



MeetingBooster

Reference Guide

DRAFT



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Introduction

MeetingBooster

MeetingBooster offers a unified and easy to use framework for scheduling and running meetings, creating and tracking tasks, and for handling meeting minutes. It is web-based and will run on virtually any computer with internet access. The web interface is intuitive, and the application integrates seamlessly with Microsoft Outlook via plug-ins, providing a familiar interface for scheduling meetings, creating and tracking tasks and sending out and accepting meeting invitations.

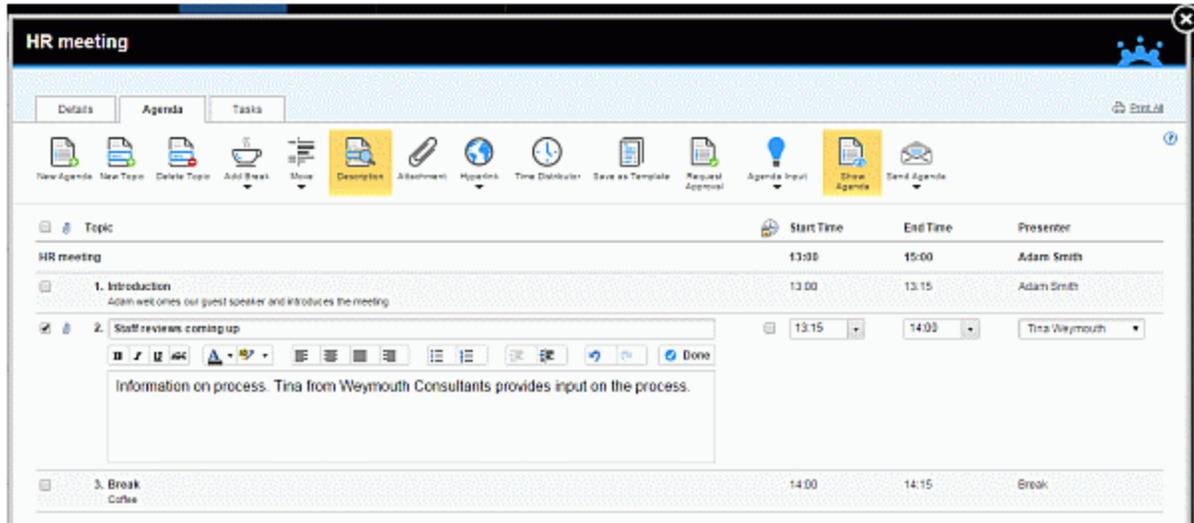
Quick and easy way to attend meetings

Meeting Title	Organizer	Date -	Time	Action	Status
Quarterly staff meeting	Adam Smith	07/07/2014	11:00 - 13:00	Join 	Accepted <input type="button" value="v"/>

For meeting attendees, using MeetingBooster is simple. All you need to do is to sign in, find your meeting in the MeetingBooster workspace, and click **Join**. If you use the Microsoft Outlook plug-in, you may also join your meetings directly from your Outlook calendar. Once you have joined the meeting, you can quickly and easily see who else is attending, view all topic notes and conclusions, download and view attachments added to the meeting, and view the meeting minutes anytime you like during the meeting.



Meeting scheduling and execution options



With the Outlook plug-in, you may send out meeting invitations automatically, greatly simplifying organization tasks. And when the meeting is executed, you may enter notes and conclusions for the entire meeting or individual topics as needed, remove topics from the agenda and reinstate them on the fly, add tasks and put various issues to the vote or illustrate them graphically using the built-in rating and pros/cons tools. When the meeting is ended, detailed minutes are automatically created, ready to be approved and then sent out to all attendees using e-mail or printed to PDF for archiving purposes. MeetingBooster integrates with GoToMeeting and WebEx for screen sharing and audio/video communication features, thus providing everything that is needed for effective meetings across borders.



Attendee Guide

The MeetingBooster window

The MeetingBooster window is made up of two main components:

- The **main window** displays information on the user's upcoming meetings and tasks. You may switch between main window views by clicking the **tabs** on top of the window. The main window also includes a system search feature.
- The **menu** on the left is used to perform various actions such as viewing or creating meetings. The commands available in the menu depend on the view chosen in the main window, your position in the user hierarchy and your security roles.

Meeting Title	Organizer	Date	Time	Action	Status
HR meeting	Adam Smith	02/07/2015	13:00 - 15:00	Join	Accepted
Regular audit meeting	Adam Smith	10/07/2015	13:15 - 14:15	Start Delete	Accepted

Main window tabs

The **Meetings** and **Tasks** tabs provide a quick overview of upcoming meetings and tasks. For meetings and tasks to be displayed in the two tabs, they must fulfil two requirements:



- They must be meetings or tasks that you have created or have been invited to attend (for meetings) or assigned to perform (for tasks).
- The date of the meeting or the due date for the task must be within the date range chosen in the date filter drop-down list.

Searching MeetingBooster

MeetingBooster includes two search features: a system search feature and a page-specific filter feature.

- The **system search** feature searches meeting titles, meeting topic descriptions, topic notes, topic presenters, task creators, task titles and task assignees in the entire MeetingBooster system of the organization. It is very useful for searching for important information across any number of projects, tasks and meetings.
- The **filter** feature filters items available on the current page based on your input. It is very useful when you want to find something on the current page quickly, for example if you want to search for all meetings under My Meetings that include the word "sales".

Note: Content that only exists in Microsoft Outlook and has not yet been synchronized with the MeetingBooster server is not searched.

Using the system search feature

Enter the search text in the field at the top right of the MeetingBooster window.

- You may search for multiple words by separating them by a space.
- You may search for a phrase by enclosing it in quotation marks.

Click **Search**  or press Enter.

All results matching the search text are displayed on a result page using yellow highlighting.



The screenshot shows a search results page titled "SEARCH RESULTS" with 30 results for "sales". At the top, there are filters for "Select All", "Topics", and "Tasks", and a "Show Meetings" dropdown set to "10". An "Export Selections" button is in the top right. The results are organized into two main sections:

Meetings	Date	# of Hits	Presenter
Corporate sales strategy Meeting Purpose: Preliminary discussions towards a redefined sales strategy for the next five years Topics (1): Corporate sales strategy	24/11/2014	3	
Dev test meeting Topics (3): Sales activity Sales person success stories Scheduled sales activity	22/01/2015	3	

- (Optional) Refine the search results to show only topics, only tasks, or both by selecting a check box as appropriate.
- Click the minus and plus buttons next to the results to collapse or expand details as needed. This is very helpful in case of lengthy search results.
- To navigate the search results, use the arrow icons below the search results.
- Click any link in the search result to go directly to the document location in the MeetingBooster system.

Exporting global search results

Agenda topics and tasks from global search results may be exported to a PDF file.

- Select the check boxes next to the items you want to export.
- Click **Export Selections**

A PDF containing the selected agenda topics and tasks is created. The PDF contains bookmarks, enabling you to quickly browse the exported search results by meeting.

The PDF also includes attachments in topics and notes. These attachments may be opened directly from the PDF by double-clicking the pin icon or by right-clicking it and selecting to open the attachment.

Using the filter feature

- Make sure that you are located on the page you want to search



- Enter the search text in the **Filter** field.

- Click **Filter** or press Enter.

The current view is filtered to show only items containing the search text.

Reset the **Filter** by doing one of the following:

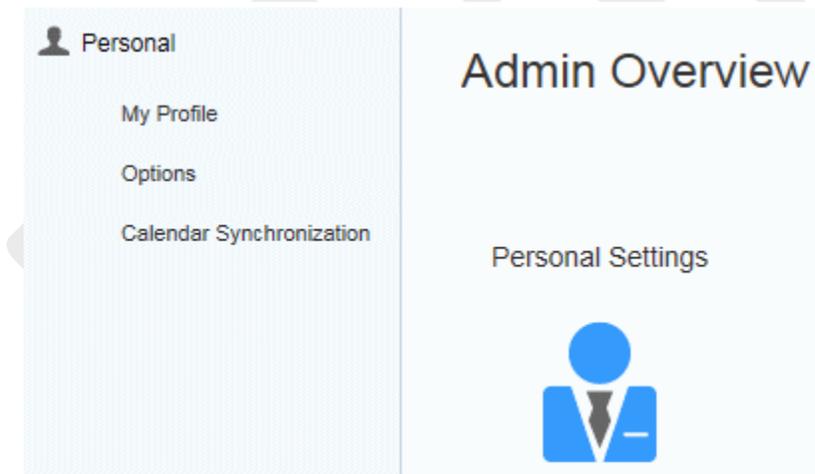
- Delete all search text in the **Filter** field and click **Filter**.
- Click **Delete** at the right of the **Filter** field.

Setting up your preferences

On the MeetingBooster site, you may change your profile information and user preferences.

Accessing the Admin section to view and change information

- Click **Settings** and select **Admin**.



Changing your name or adding a signature

- Click **My Profile** in the menu or **Personal Settings** in the main window.



Display Name	<input type="text" value="Adam Smith"/>
Full Name	<input type="text"/>
Title	<input type="text"/>
Email	<input type="text" value="adam@example.com"/>

Changing your password

- Click **Change Password**.

Old Password	<input type="password"/>
New Password	<input type="password"/>
Confirm Password	<input type="password"/>

- Enter your old password and the new one, and retype the new password to confirm it.
- Click **Save**.

Setting up calendar synchronization

MeetingBooster gives you several options for synchronizing information with various other applications and services. You can set up all of these in the Admin section.

- Click **Settings**  and select **Admin**.
- Click **Calendar Synchronization** in the menu.

Setting up calendar synchronization options

MeetingBooster can be synchronized with several other applications and services. Select which synchronization method you would like to use. The method selected here is used for notifying attendees when you have scheduled a meeting (unless you select **No synchronization**).

- **No synchronization:** Attendees are not notified directly of meetings that you schedule. They can see the meetings on the Meetings tab in the main window when they log into MeetingBooster.
- **Send RSVP email from MeetingBooster:** Attendees are notified of meetings that you schedule through RSVP e-mails sent from MeetingBooster.



- **Use Outlook to send a meeting invitation:** If you have installed the Microsoft Outlook plug-in and open Outlook, the plug-in ensures synchronization of data between MeetingBooster and Microsoft Outlook and automatically sends invitation e-mails to all attendees of meetings that you schedule when Outlook is running. If you have installed the Outlook plug-in, this is the default synchronization setting.

Viewing meetings and tasks

The Meetings and Tasks tabs in the main window show your meetings and tasks. They may be filtered and sorted according to various criteria.

On the Meetings tab, you may see the following:

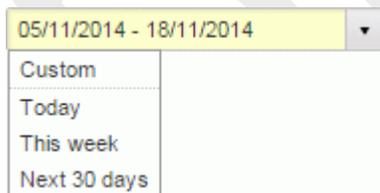
- All meetings that you have created
- All meetings that you have been invited to attend

On the Tasks tab, you may see the following:

- All tasks assigned to you
- All tasks from projects that you belong to
- All tasks in relation to meetings that you have participated in
- Tasks for users below you in the organization hierarchy (If you have permission)
- Projects in your organization (If you have permission)

Filtering by date

- Select the Meetings or Tasks tab depending on whether you want to view meetings or tasks.
- Click the date range drop-down list, and then do one of the following:



- Select **Today**, **This Week** or **Next 30 Days** to filter meetings or tasks by a preset date range.
- (Tasks only) Select **Default** to use the default date range: from one month prior to today's date to three months after today's date.
- (Tasks only) Select **Last 30 days**, **Last 3 months**, **Last 6 months** or **Last 12 months** to only display tasks in the past.
- Select **Custom** to open the date range selector and enter a start date and end date manually.



Select custom start and end dates by doing one of the following:

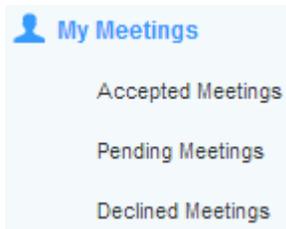
- Selecting the desired dates in the calendar view to the left
- Entering the desired dates in the date fields to the right

The list now shows all meetings or tasks within the date range selected.

The filter may be refined by status using the predefined filters in the menu on the left or by search text entered in the Search field.

Filtering using the predefined menu filters

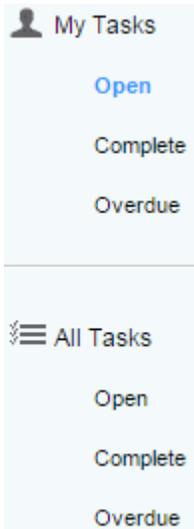
For meetings:



- Click **Accepted Meetings** to view all meetings that you have accepted in the date range selected.
- Click **Pending Meetings** to view all meetings that you have not accepted or declined yet in the date range selected.
- Click **Declined Meetings** to view all meetings that you have declined in the date range selected.



For tasks:



The Tasks view is divided into two sections: **My Tasks** showing tasks created by you or assigned to you, and **All Tasks** showing all tasks that you have permission to view. This could be tasks created at meetings that you attended or tasks assigned to employees below you in the user hierarchy.

- Click **Open** to view all tasks that have not yet been completed in the date range selected. This is the default task view.
- Click **Complete** to view all tasks that have been completed in the date range selected.
- Click **Overdue** to view all overdue tasks. The date range selected is ignored.

Accepting or declining a meeting

It is not necessary to accept a meeting before being able to attend it in MeetingBooster. Accepting a meeting, however, gives the meeting organizer advance notice that you will be attending, making planning tasks in connection with the meeting easier.

NOTE: Guests (meeting attendees who are not members of the organization's MeetingBooster installation) are not given the option to accept or decline meetings.

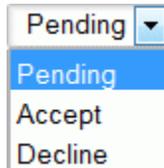
On the MeetingBooster site

- Locate the meeting on the **Meetings** tab. If the meeting has not yet been accepted, its status will read **Pending**.

Meeting Title	Organizer	Date *	Time	Action	Status
Quarterly staff meeting	Adam Smith	07/07/2014	11:00 - 13:00	Join	Pending <input type="button" value="v"/>



- Click the entry in the **Status** column. The meeting status changes into a drop-down list. (Depending on the browser you use, the column entry may already be a drop-down list.)



- Select **Accept** or **Decline**.

If you select **Decline**, the meeting is removed from your list of meetings. However, you may still view and accept it by clicking the predefined filter **Declined Meetings**. This is useful if you decline a meeting by mistake.

Note: If you are not going to participate in a given meeting, declining it in MeetingBooster not only gives the meeting organizer advance notice that you will not be participating: it also makes it possible for the administrator to achieve more accurate absence reports.

From an invitation e-mail

If you receive a meeting invitation by e-mail, you may have the same options for accepting the meeting that you normally do when using your e-mail client, or different options as described below.

- In Microsoft Outlook, there may be **Accept**, **Tentative** and **Decline** buttons.
- Other e-mail clients may provide buttons to accept the meeting as well. If they do not, click the link in the invitation e-mail to go to the MeetingBooster site and accept the invitation as described above.
- RSVP e-mails sent directly from MeetingBooster contain links that you can click to accept or decline the meeting. If you click **Accept**, you are taken to a MeetingBooster web page where you may download and save meeting information in Outlook, Gmail or iCal format.

Providing input on meeting agendas

When you have been invited to a meeting, you can send suggestions and comments to the meeting organizer from the MeetingBooster website. Such input can be very valuable to the organizer when creating or editing the agenda of the meeting.

You do not need to accept the meeting in order to provide input on it, but you cannot provide input on meetings that you have declined. You cannot provide topic suggestions for past meetings.



Entering and editing topic suggestions

On the **Topic Suggestions** tab, click **New Topic**  to add a topic suggestion, or click an existing topic suggestion to edit it.

Topic Suggestions Comments

New Topic Delete Topic Attachment Hyperlink

 Topic Suggestion

Unreliable cooling systems in machine shop
We need to look into the cooling systems ASAP. They are very unreliable and break down on a weekly basis.

Staff shortages

B *I* U abc **A** **A** ☰ ☷ ☶ ☵ ☴ ☳ ☲ ☱ ☰ ☷ ☶ ☵ ☴ ☳ ☲ ☱ Done

We need to investigate if we can get more staff to handle demand surges

- Provide a topic title.
- (Optional) Enter a topic description and format it as desired.
- (Optional) Click **Attachment** or **Hyperlink** to insert an attachment or hyperlink in the topic suggestion.

Deleting topic suggestions

Select one or more topic suggestions to be deleted, and click **Delete Topic** .

Entering comments

- On the **Comments** tab, click **Add Comment** .



Topic Suggestions
Comments


 Add
Comment


 Delete
Comment

Comment

Good thing that we're addressing this now!

B ***I*** **U** ↔ **A** ▼ **A** ▼ ☰ ▼ ☰ ☰ ☰ ☰ ↶ ↷ Done

Perhaps we should set up a meeting series or a project with the guys in maintenance?

- Enter your comment.
- Select the **Private** check box if the comment is only for the organizer or co-organizer.

Deleting comments

Select one or more comments to be deleted, and click **Delete Comment** .

Approving meeting agendas

While the meeting organizer is responsible for creating an agenda for the meeting, he or she may want you to approve the agenda to make sure that everybody agrees on the content of the meeting before starting it. Likewise, the organizer may want you to review and approve the meeting minutes to make sure that everything that happened during the meeting was recorded correctly. MeetingBooster includes an approval system for both agendas and minutes.

Note: You can provide suggestions and comments for an agenda even when you have not been requested to approve it.

The number of meetings whose agendas or minutes are awaiting your approval is shown in red next to the **Pending Approvals** option in the menu of the main window.



You also receive an e-mail notifying you of the pending approval.

- Do one of the following:



- Click the link in the e-mail.
- Click **Pending Approvals** in the MeetingBooster main window to see a list of meetings whose agenda or minutes you have been requested to approve, and open the desired meeting for approval by clicking the meeting title.

Review the agenda shown.

- (Optional) Click **Approval Status**  to see a list of attendees requested to approve the agenda, and whether they have approved or rejected it yet.
- (Optional) Click **Provide Input**  to provide input before approving or rejecting the agenda.
- (Optional) Click **Show Changes**  to compare the current agenda with previous versions if available. Select the version you would like to compare with.

A dialog opens to show you the changes between the two versions.

Coordination group meeting

04/08/2015 14:00 - 16:00

Purpose:	
Presenters:	Adam Smith, Brian Jones, Christine Jones, Dennis Meyer
Attendees:	Rasmus, Adam Smith  , Brian Jones  , Charlotte West, Christine Jones  , Dennis Meyer  
Undo Deleted text Added text Edited text	
<input checked="" type="checkbox"/> 1. Recap from last meeting	14:00 - 14:15
Short recap to get us all on the same page as regards the coordination project	
Presenter: Adam Smith	
<input checked="" type="checkbox"/> 2. Progress report	14:15 - 14:45
Dennis Meyer fills us in on progress	
Presenter: Dennis Meyer	
 3. Break	15:45 - 16:00
4. Definition of targets and expectations	14:45 - 15:30
Presenter: Brian Jones	
<input checked="" type="checkbox"/> 5. Assignment of tasks and planning of next meeting	15:30 - 15:45
Tasks for next meeting to be defined	
Presenter: Christine Jones	

Changes are shown as follows:

-  Identifies a new topic or a new attendee. In the case of an attendee, clicking the icon shows you a table with his or her meeting attributes.



Before	After
Distribution ✓	Distribution ✓
Required ✓	Required
Co-Organizer	Co-Organizer ✓
Approver	Approver

Undo

Identifies a deleted topic or a removed attendee. Clicking the icon shows you the deleted topic or the removed attendee with his/her previous attributes.

Identifies a topic that has been edited, or an attendee whose meeting attributes have changed (for example because he or she is no longer required to approve the agenda) or another meeting change.

In the case of a topic, clicking shows you what parts of the text have been added, deleted or edited.

Deleted text Added text Edited text

In the case of an attendee, clicking shows you a table highlighting the changes made to his or her attributes.

- To approve or reject the agenda, click **Approve/Reject** , select **Approve** or **Reject** as appropriate, and click **Save and Close**. If you select **Reject**, you are taken to the **Comments** tab where you may add a note for the organizer explaining why you rejected the agenda.

The meeting organizer is notified of your actions. Depending on the input and approvals/rejections received from you or other attendees, the organizer may decide to edit the agenda and resend it to you for approval.

Joining a meeting

You may join a meeting in the following ways:

- From the list of meetings under the **Meetings** tab on the MeetingBooster site
- From an invitation e-mail
- From Microsoft Outlook



When you have joined the meeting, the meeting workspace is opened in your default web browser. If the meeting organizer has set up screen sharing, you may also be able to use audio/video communication and screen sharing during the meeting.

From the list of meetings under the Meetings tab

- Locate the meeting you want to join in the list of meetings.

Meeting Title	Organizer	Date -	Time	Action	Status
Quarterly staff meeting	Adam Smith	07/07/2014	11:00 - 13:00	Join	Accepted <input type="button" value="v"/>

- Click **Join**.

From an invitation e-mail

- Click the link in the invitation e-mail. You are taken directly to the meeting site.
Note: You may have to log in using your e-mail address and password.
- Click **Join**.

From Microsoft Outlook

- Click **Calendar** in the navigation pane in Microsoft Outlook.
- Locate the MeetingBooster meeting in the calendar. Then do one of the following:
 1. Select the meeting and click **Start Meeting**  in the ribbon (Outlook 2010 and 2013 only).
 2. Right-click the MeetingBooster meeting, and click **Start Meeting**  in the shortcut menu.

Attending a meeting

MeetingBooster meetings are executed in real time using interactive online meeting workspaces that gives organizer and attendees alike many options during the meeting.

User roles in MeetingBooster meetings

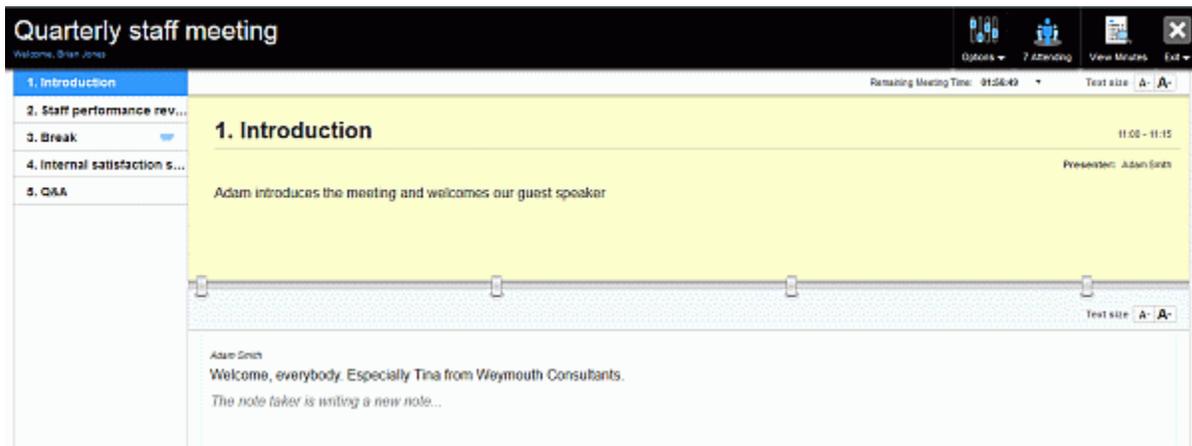
During the meeting, the people attending it have various roles and privileges as described in the table below:



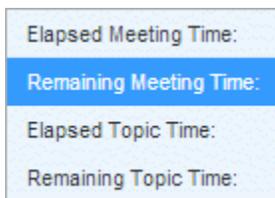
Role	Description
Attendee	A regular meeting attendee without any special privileges. The options available to regular attendees are described in this topic.
Organizer	The person who schedules the meeting. The organizer can edit the meeting prior to starting it and can assign a different host and note taker. The organizer can also add meeting tasks. The organizer ends the meeting and can edit the meeting minutes afterwards. For more information on scheduling meetings, see " Scheduling from MeetingBooster " and subsequent topics in the Organizer Guide.
Co-organizer	An attendee appointed by the organizer who has the same rights as the organizer and can take over the meeting if the organizer is absent.
Host	The host of the meeting who controls the agenda (navigates from topic to topic) and can use the meeting tools. By default, the organizer acts as host, but the organizer may assign the host role to another attendee. For more information, see " Navigating from topic to topic " under " Hosting a meeting " and " Using the meeting tools " in the Organizer Guide.
Note taker	An attendee who takes notes for individual topics and enters conclusions. The note taker may also use the meeting tools and add tasks in MeetingBooster and edit the meeting minutes after the meeting. By default, the organizer acts as note taker, but the organizer may assign the note taker role to another attendee. For more information, see " Taking meeting notes ", " Using the meeting tools " and " Editing meeting minutes " in the Organizer Guide.
Presenter	An attendee who is assigned to present a particular topic on the agenda during the meeting. Presenters may be selected for individual topics when the agenda is created; for more information, see " Creating an agenda " in the Organizer Guide.

The meeting workspace

The meeting workspace shows various information on the meeting in progress.



At the top of the workspace, you can see a time indicator showing elapsed meeting time. You may click the title of this indicator to select a different time indicator:



- **Remaining Meeting Time:** Shows the remaining meeting time (compared to the set meeting time on the agenda).
- **Elapsed Topic Time:** Shows the elapsed time for the current topic.
- **Remaining Topic Time:** Shows the remaining time for the current topic (compared to the set topic time on the agenda)

Underneath the time indicators are two panes.

- The yellow top pane is called the **topic pane** and shows the name of the presenter (if any), the title of the current topic, a description of the topic (if a description has been entered) and any attachments for the topic. The original scheduled time for the topic is also displayed. At the far left of the topic pane, the full agenda is visible.
- The bottom pane is called the **note card** and contains notes in relation to the meeting. It is updated in real time with notes created by the note taker.

Saving and viewing attachments

If attachments have been added to a topic or note, you may click them to save them to your computer, and open them from there.



Viewing the meeting tools

During the meeting, the organizer or note taker may ask the attendees for input in the form of votes, ratings or pros/cons. The results of the meeting tools are immediately visible in the meeting workspace.

Voting in progress...

Should we have more reviews?

Participants	Yes	No
Adam Smith	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Brian Jones	<input type="checkbox"/>	<input type="checkbox"/>
Charlotte West	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Christine Johnson	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edward Ajolo	<input type="checkbox"/>	<input checked="" type="checkbox"/>
George Mason	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Leave a meeting

If you wish to leave a meeting before it is ended by the organizer, click **Exit**  and select **Leave meeting**.

Note: If you leave a meeting, log out of MeetingBooster and log in again, a dialog will be shown informing you that you have a running meeting. From this dialog, you may join the meeting or click **Cancel** to go to the MeetingBooster home page.

You have a running meeting.



When the organizer ends the meeting

If you do not leave the meeting prematurely, it will end when the organizer decides to end it.

When the meeting is ended by the organizer, the final minutes of the meeting are displayed on your screen.

After the meeting has ended, you may be asked to approve the meeting minutes and/or provide feedback on the meeting.

Viewing meeting minutes

The meeting minutes are displayed automatically after the meeting has ended and show the following information regarding the meeting:

- All basic information on the meeting (title, date, purpose, attendees etc.)
- All meeting notes
- All topic notes and conclusions
- All votes, pros/cons and ratings entered
- All attachments and hyperlinks added
- All tasks entered during the meeting

Note: You may also view current meeting minutes during the meeting. The organizer or note taker may edit the meeting minutes after the meeting.

Using meeting minute views

- Click the **Minutes** tab to view the meeting minutes.
- Click the **Tasks** tab to view tasks entered during the meeting.
- Click **Conclusion** to view topic conclusions only and hide topic notes. This is very useful for getting an executive overview of lengthy meetings with many discussions.
- Click **Discussion** to view the complete meeting minutes with topic notes as well as conclusions.

Providing comments on meeting minutes

If you have suggestions for the meeting minutes, for example because you disagree with the wording of a particular note, you can provide comments on the meeting minutes for the note taker.

- Click **Provide Input**  .
A dialog opens where you may enter comments. The dialog may contain comments from you or other meeting attendees, including comments provided during agenda creation (if any). You can add new comments or edit your existing comments, as long as they have not yet been processed by the organizer.



- Click **Add Comment** .
- Enter your comment.
- Select the **Private** check box if the comment is only for the organizer or co-organizer.
- Click **Done** and **OK**.

Deleting comments

- Select one or more comments to be deleted, and click **Delete Comment** .

Searching meeting minutes

You may search for specific words or phrases in the meeting minutes.

- Enter the search text in the search field at the top of the meeting minutes.
- Click **Search** .

All occurrences of the search text in the meeting minutes are highlighted in yellow.

You may navigate from occurrence to occurrence using the arrow buttons  . The currently selected search result is highlighted in blue.



Printing meeting minutes

- Click **PDF**  to save a PDF version of the meeting minutes to your computer.

Note: Meeting minutes in PDF format do not contain tabs and cannot be filtered. They contain all information included in the meeting minutes and as such may be lengthy documents. Use the search feature of your PDF viewer to quickly find relevant information as necessary.

Approving meeting minutes

At the end of a meeting, the organizer may want you to review and approve the meeting minutes to make sure that everything that happened during the meeting was recorded correctly. MeetingBooster includes an approval system for both agendas and minutes.

The number of meetings whose agendas or minutes are awaiting your approval is shown in red next to the **Pending Approvals** option in the menu of the main window.



You also receive an e-mail notifying you of the pending approval.

Do one of the following:

- Click the link in the e-mail.
- Click **Pending Approvals** in the MeetingBooster main window to see a list of meetings whose agenda or minutes you have been requested to approve, and open the desired meeting for approval by clicking the meeting title.
- Review the minutes shown.
- (Optional) Click **Approval Status**  to see a list of attendees requested to approve the minutes, and whether they have approved or rejected them yet.
- (Optional) Click **Provide Input**  to provide comments if you feel that the host has forgotten something important, or if you think that something has been misrepresented in the minutes.

A dialog opens showing all comments made during creation and approval of the agenda, letting you add new comments or edit your own comments.

- (Optional) Click **Show Changes**  to compare the current minutes with previous versions if available. Select the version of the minutes you would like to compare with.

A dialog opens to show you the changes between the two versions.



Coordination group meeting

04/08/2015 14:00 - 16:00

Purpose:	
Presenters:	Adam Smith, Brian Jones, Christine Jones, Dennis Meyer
Note Taker:	Rasmus
Attendees:	Rasmus, Adam Smith, Brian Jones, Charlotte West, Christine Jones, Dennis Meyer

1. Recap from last meeting

14:00 - 14:15

Presenter: Adam Smith

Short recap to get us all on the same page as regards the coordination project

← Undo Deleted text Added text Edited text

Adam Smith
Please refer to the minutes from our ~~last~~ June meeting for further info. They're all in MeetingBooster, but I attach them here as a PDF just in case

 [minutes_June_meeting.pdf](#)

Conclusion

Remember to always check old minutes in MB. Saves us all a lot of time!

2. Progress report

14:15 - 14:45

Presenter: Dennis Meyer

Dennis Meyer fills us in on progress

Dennis Meyer
Development is coming along fine. A few minor issues still persist, but I am confident that we'll iron them out over the next few days.

Charlotte West
Check out this link to our sales tools

 [SharePoint folder with sales tools](#)

Conclusion

We need to get marketing on board and align expectations with management and sales

Changes are shown as follows:

-  Identifies a new note or conclusion.
-  Identifies a note or conclusion that has been deleted. Clicking  shows you the deleted element.
-  Identifies a note or conclusion that has been edited. Clicking  shows you what parts of the text have been added, deleted or edited,

Deleted text Added text Edited text



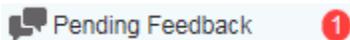
- To approve or reject the meeting minutes, click **Approve/Reject** , select **Approve** or **Reject** as appropriate, and click **Save and Close**. If you select **Reject**, you are taken to the **Comments** tab where you may add a note for the organizer explaining why you rejected the meeting minutes.

The meeting organizer is notified of your actions. Depending on the input and approvals/rejections received from you or other attendees, the organizer may decide to edit the minutes and resend them to you for approval.

Providing feedback on meetings

When the meeting has ended, you may be asked to provide feedback on the meeting.

When you must provide feedback on one or more meetings, this is indicated with a number next to the **Pending Feedback** option in the menu.



You also receive an e-mail notifying you of the pending feedback.

- Click the link in the e-mail
- Click Pending Feedback to see a list of meetings where you must provide feedback, and open the desired meeting for feedback by clicking the meeting title.

You will be directed to a feedback form like the one pictured below on the MeetingBooster site.

Meeting Feedback

Rate	Poor 1	Fair 2	Average 3	Good 4	Excellent 5	
Rate the meeting	<input type="radio"/>					
Rate yourself	<input type="radio"/>					
Rate Charlotte West	<input type="radio"/>					

- Click **Comments**  to provide additional comments if you wish, and if the administrator has enabled this feature.



Note: If you do not wish to provide any feedback on the meeting, press Esc to close the feedback dialog. The feedback request will be deleted from the system after a time if you do not provide feedback. Until it is deleted, you can provide feedback by clicking the link in the e-mail or by clicking **Pending Feedback** in the menu on the MeetingBooster home page. You will also be reminded of the feedback request in the weekly e-mails you receive from MeetingBooster.

Working with tasks

In MeetingBooster, besides being invited to meetings, you may be assigned tasks to complete. There are three different types of task:

- **Preparation tasks** that are created for specific meetings and are usually to be completed before the meeting starts
- **Meeting tasks** that are created during the meeting
- **Non-meeting tasks** that are not connected to a specific meeting

You may view all tasks assigned to you on the **Tasks** tab of the MeetingBooster site. The tasks shown may be filtered and printed as necessary. When you have completed a task assigned to you, you may mark it as closed, and you may indicate how far you have come with the task. If you use the Microsoft Outlook plug-in, you may also view and create MeetingBooster tasks from Outlook.



Organizer Guide

Scheduling from MeetingBooster

- Click **New Meeting** in the menu on the left on the MeetingBooster home page.

- Enter the title of the meeting.
- (Optional) Enter a meeting purpose and a location for the meeting.
- Select a date and start and end times for the meeting.
If there may be a conflict with the start time selected, a warning icon  is shown.
- (Optional) Select a meeting series for the meeting.
If you select a meeting series, a dialog is shown asking if you want to add all members of the meeting series to the meeting.
- Click **Add Attendee** or **+ Attendee** , select the desired attendees on the list, and click OK to add them to the meeting. You may also click **+ Guest**  to invite one or more guests to the meeting.



- (Optional) Select the **Screen Sharing** check box to set up screen sharing for the meeting.
- (Optional) Click the **Agenda** tab to add an agenda to the meeting.
- (Optional) Click the **Tasks** tab to add tasks to the meeting.
- Click **Save and Close**.

Attendee notification options

There are several options for notifying meeting attendees when you have scheduled a meeting from MeetingBooster. You can select which option to use from the Admin section.

Scheduling from Microsoft Outlook

MeetingBooster meetings can be created in Microsoft Outlook in two ways:

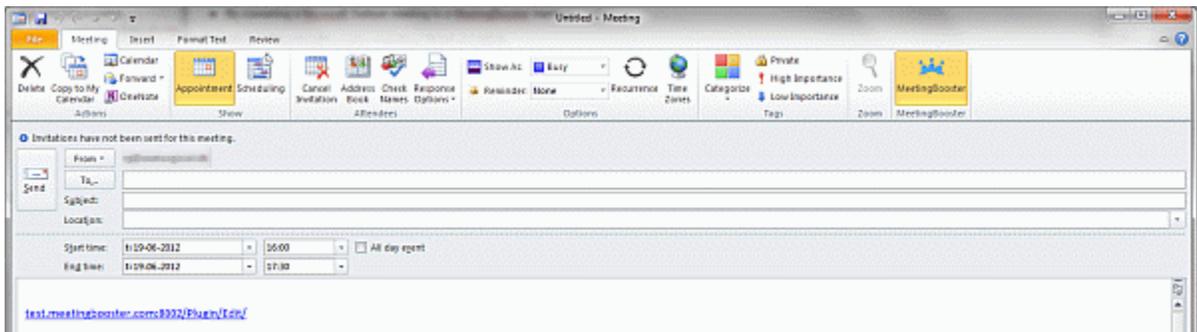
- By creating a MeetingBooster meeting from scratch
- By converting a Microsoft Outlook meeting to a MeetingBooster meeting

Creating a MeetingBooster meeting from scratch

- In Outlook 2010 and 2013, do one of the following:
 1. Select the MeetingBooster ribbon tab and click **New Meeting**.
 2. In the Calendar view, click **New Meeting** in the MeetingBooster group on the Home ribbon tab.
 3. Click **New Items** and select **MeetingBooster Meeting**.
 4. Right-click a date in the calendar, and select **New MeetingBooster Meeting** in the context menu.
- In the dialog that opens, provide all necessary meeting information.

The dialog is the same as for regular Microsoft Outlook meetings with one exception: It contains a MeetingBooster button in the ribbon that has been selected to indicate that the meeting is a MeetingBooster meeting.

If the selected meeting time conflicts with the schedule of one or more of the selected attendees, a warning dialog is shown.



Note: While it is possible to invite Microsoft Outlook contacts to MeetingBooster meetings even though they do not belong to the organization's MeetingBooster installation, they will not be able to attend the MeetingBooster meeting. Always make sure that the people you invite to MeetingBooster meetings actually belong to the organization's MeetingBooster installation. If in doubt, contact your administrator.

You may, however, invite guests to a MeetingBooster meeting if you schedule the meeting from the MeetingBooster home page

- Click **Send** to send invitations for the meeting and save it in your calendar.
- To edit the agenda or tasks for the meeting, open the meeting from the Microsoft Outlook calendar and click the link in the meeting to go to the MeetingBooster site and edit the meeting details as necessary.

When Microsoft Outlook receives responses from the invited attendees and updates the attendee status (Accepted, Declined, and so on), this status is automatically synchronized with MeetingBooster.

Note: In Microsoft Outlook, it is possible to schedule meetings as all day events. MeetingBooster does not support this feature, showing an error message if you select the **all day event** check box in Outlook. To schedule an all-day MeetingBooster meeting, enter 00:00 as the start time and 23:30 as the end time.

Converting an Outlook meeting to a MeetingBooster meeting

- Locate the meeting in the Outlook calendar, and do one of the following:
- In Outlook 2007, double-click the meeting to open it, and click the **MeetingBooster** button



- In Outlook 2010 and 2013, select the meeting and click **Convert to MeetingBooster meeting**  in the ribbon.



You may also right-click the meeting, and click **Convert to MeetingBooster Meeting**  in the shortcut menu.

A link to the converted MeetingBooster meeting is inserted in the dialog. If the selected meeting time conflicts with the schedule of one or more of the selected attendees, a warning dialog is shown.

- Click **Send Update** to send updates to all attendees, save the meeting, and close the dialog.

Scheduling a recurring meeting

Recurring meetings can be scheduled in MeetingBooster following the same basic procedure as for regular, one-off meetings. This feature is very useful for staff meetings, project status meetings or any other kind of meeting that recurs regularly and requires the same attendees to be present.

Note: MeetingBooster does not check if there are schedule conflicts for any attendees when scheduling recurring meetings. If you schedule a recurring meeting from Microsoft Outlook, the e-mail client will check if the new meeting conflicts with any existing entries in the e-mail client's calendar.

From the MeetingBooster page

- Click **New Recurring Meeting** in the menu.



- Enter the title of the recurring meeting and add all other necessary details (location, start and end times, meeting series, attendees and/or screen sharing).
- Select a meeting recurrence (**Daily, Weekly, Monthly or Yearly**), and add the necessary recurrence information:
 1. For meetings with daily recurrence, select how often the meeting should repeat (**Every x days**, where x is the amount of days between each meeting).
 2. For meetings with weekly recurrence, select how often the meeting should repeat (**Every x weeks**, where x is the amount of weeks between each meeting), and select on which days of the week meetings should recur.
 3. For meetings with monthly recurrence, select whether the meeting should repeat by a set date or on a set weekday, and enter the necessary details on the set day or date.
 4. For meetings with yearly recurrence, select whether the meeting should repeat by a set date or on a set day of the month, and enter the necessary details on the set day or date.
- Enter the date of the first meeting in the **Starts** field.
- Select whether the meeting should never end, should end after a specified number of occurrences, or should end by a set date.
- Click **Save and Close**.



From Microsoft Outlook

- Schedule a MeetingBooster meeting as normally
- Click **Recurrence** in the ribbon.
- Select recurrence options in the Appointment Recurrence dialog.

- Click **Save and Send**.

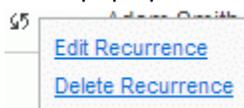
The next time Microsoft Outlook is synchronized with the MeetingBooster server, the recurring meeting is synchronized with the server.

Changing the recurrence of a recurring meeting

You may change the recurrence of a recurring meeting.

From the MeetingBooster website

- Locate the recurring meeting under My Meetings.
- Click **Recurrence**  to the left of the organizer name.
- In the pop up window that opens, click **Edit Recurrence**.





The **Details** tab of the meeting editor opens, allowing you to update all recurrence details as necessary. Please note that your changes apply to all instances of the recurring meeting.

Note: If you click **Delete Recurrence**, the recurring meeting is deleted. You will be prompted to confirm the deletion.

If you only need to edit the date and time for one instance of a recurring meeting, click the meeting title under My Meetings and edit the meeting as necessary. All other instances are unchanged.

From your e-mail client

- Locate and edit the recurring meeting as normally for your e-mail client. At the next synchronization, the meeting updates are synchronized with the MeetingBooster server.

Working with meeting series

Meetings are often related to one another because they deal with the same subjects. When such a relation between meetings is known in advance, and when the meetings recur regularly, one simple way of handling this is to set up a recurring meeting.

However, it may not always be known in advance which meetings belong together. A meeting that was originally considered completely unrelated to a particular subject may suddenly become important, and other meetings that were originally considered crucial may lose significance. Sometimes recurring meetings may need to be grouped with one-off meetings on the same subject. And very often, meetings related to the same subject are anything but regular but still need to be treated as part of the same group.

With MeetingBooster, you may group any number of meetings (including recurring meetings) using meeting series. Meetings may be added to and removed from the series as needed, providing a flexible way of keeping track of meetings related to a particular subject. You may assign members to a meeting series, making meeting scheduling easier. Meetings may be added to a meeting series when scheduling a new meeting on the MeetingBooster home page. For more information, see "[Scheduling from MeetingBooster](#)".

Viewing meeting series

- Click **Meeting Series** in the menu on the left on the MeetingBooster home page.

Name	Organizer +	Meetings	Members
HR	Adam Smith	1	3
Sales development project	Adam Smith	5	6



A list of meeting series in the organization is shown. For each meeting series, you may see the name of the organizer and the number of meetings and members in the series.

Creating a new meeting series

- Click **New Series** in the menu on the left on the MeetingBooster home page.

	Name	Title	Can create meetings	Email
<input type="checkbox"/>	Brian Jones	Head of Service	<input checked="" type="checkbox"/>	brian@example.com
<input type="checkbox"/>	Charlotte West	Sales Nordic	<input type="checkbox"/>	charlotte@example.com

A dialog opens with the **Details** tab selected.

- Enter the title of the series.
- (Optional) Click **Add Member** or **Remove** as necessary to select members for the series.
- (Optional) Select the **Can create meetings** check box next to a member if that member should be allowed to create meetings in the series.
- Click **Save** or **Save and Close**.

Editing a meeting series

- Click **Meeting Series** in the menu on the left on the MeetingBooster home page.
- Click the title of the meeting series you want to edit.
- Edit the meeting series as necessary on the **Details** tab.
- Click **Save** or **Save and Close**.

Adding a meeting to a series

You may add a meeting to a series in two ways:

- By clicking **New Meeting** in the top right corner when creating or editing a meeting series as described above.
- By selecting the meeting series on the **Meeting Series** drop-down when creating a new meeting or editing an existing meeting.



Deleting a meeting series

- Click **Meeting Series** in the menu on the left on the MeetingBooster home page.
- Click the cross ✖ next to the meeting series you want to delete.

Note: You may delete meeting series created and used by other users. To avoid deleting important information, always double-check that a given meeting series should be deleted before deleting it.

The actual meetings in the series are not deleted, but they are no longer part of any series. Edit the meetings individually as necessary to assign them to other meeting series.

Inviting attendees

When you are creating a new meeting and click **Add Attendee** or **+ Attendee** , a dialog opens where you may select attendees for your meeting. The dialog contains two tabs: one with a list displaying all users in the organization and one allowing you to invite guests.

Filtering the list of possible attendees on the Attendee tab

The filter field on the **Attendee** tab allows you to filter the list of possible attendees by name. As soon as you start entering characters in the search field, the list is filtered based on your input, and you will quickly be able to find the attendees you want.

Using the Conflict Resolver

If one or more of the selected attendees on the **Attendee** tab are not available at the meeting time, the following dialog is displayed. It suggests new meeting times that suit all attendees.



Meeting Conflicts

The following meeting time conflicts with the following attendees' schedule.

Original meeting time: **April 30, 2013 07:30 - April 30, 2013 09:00**

Name	Email	Required
Adam Smith	adam@example.com	Yes

Available time slots

- April 30, 2013 08:00 - April 30, 2013 09:30
- April 30, 2013 09:00 - April 30, 2013 10:30
- April 30, 2013 10:00 - April 30, 2013 11:30
- April 30, 2013 11:00 - April 30, 2013 12:30
- April 30, 2013 12:00 - April 30, 2013 13:30

- To disregard the conflict and schedule the meeting as originally planned, click **Use Original Time**. Note that this may create scheduling conflicts in your organization.
- To schedule the meeting at a different time, select one of the suggested available time slots in the dialog, and click **Use Selected Time**. The start and end times for the meeting are updated based on your selection.

Assigning attendee attributes

After selecting attendees, you may assign various attributes for each attendee.

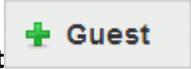
- Deselect the **Distribution** check box if an attendee should not receive the meeting agenda or the meeting minutes via e-mail when you click the **Send Agenda** or **Send Minutes** button.
- Select the **Required** check box if an attendee must attend the meeting. Note, however, that if a required attendee does not participate in a meeting, the meeting can still be executed.
- Select the **Co-Organizer** check box if an attendee is to be co-organizer of the meeting. A co-organizer has the same rights in the meeting as the organizer.
- Select the **Approve Agenda** and/or **Approve Minutes** check box if an attendee should review and approve the agenda and/or minutes of the meeting.



Adding guests

You may invite guests who are not members of the organization's MeetingBooster installation to the meeting. In this way, external consultants, lecturers, advisers and other relevant persons may participate in MeetingBooster meetings.

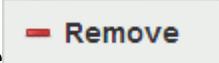
Note: Guests cannot be made co-organizers, cannot be required for meetings, cannot approve agendas and minutes, and cannot accept the meeting in advance. As the MeetingBooster server does not have availability information for the guests, it is also not possible to use the Conflict Resolver for them. These features are only available to MeetingBooster users.

- Click **+ Guest** .
- In the dialog that opens, enter a name and an e-mail address for all guests to be added.
- Click **Add** to add the guest to the list.

When the meeting is saved, all guests receive an invitation via e-mail regardless of whether an e-mail plug-in is used or not.

Removing attendees

- Select one or more attendees that you want to remove on the list of attendees, and click -

Remove .

Creating an agenda

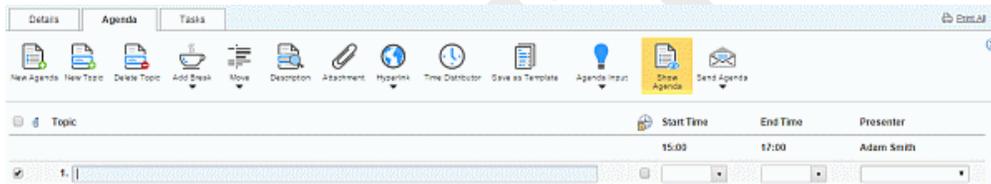
While the organizer will often create at least a preliminary agenda when scheduling the meeting, this is not necessary. It is possible to schedule the meeting without an agenda and then add an agenda for the scheduled meeting later. If an agenda still has not been added by the time the meeting is started, the organizer is prompted to create one. However, it still is not necessary to do so.

Creating an agenda from scratch

- Click the **Agenda** tab.
- In the Create Agenda dialog, select **New** and click OK.



- Provide a title and start and end times for the first topic on the agenda, and specify a presenter if desired.



- (Optional) Select the check box in the Time Lock column  to lock the start and end times for the topic. If the topic is locked, its start and end times cannot be changed using the Time Distributor.

- Click **New Topic**  to insert a new topic, and edit it as described above.
- If a topic is to be deleted, select the check box to the left of the topic, and click **Delete**

Topic

- The **Show Agenda** button is selected by default, meaning that the attendees can see the agenda. Click the button to make the agenda invisible to the attendees. This can be an advantage if the agenda contains sensitive material or is still in the early planning stages. Click the button again to make the agenda visible.
- Click **New Agenda**  to delete the current agenda and create a new one for the current meeting.
- Click **Save and Close** to save the meeting with the agenda, or click **Cancel** to abort.

Creating an agenda based on the agenda from a previous meeting

- Click the **Agenda** tab.
- In the Create Agenda dialog, select **New from existing meeting agenda** and click **Next**.
- Search for the meeting whose agenda you would like to re-use.



Adding attachments to an agenda

It is possible to add one or more attachments to the agenda. When the meeting is running, the attachments are visible in the topic panel, and all attendees may download the attachments by clicking them.

- Select the topic where the attachment is to be added.
- Click **Attachment** .
- Select the desired attachment on your computer.

Adding hyperlinks to an agenda

It is possible to add one or more hyperlinks to individual topics on the agenda. When the meeting is running, the hyperlinks are visible in the topic panel, and all attendees may click on the hyperlink to display their content.

- Select the topic where the hyperlink is to be added.
- Click **Hyperlink** , and select an option on the drop-down list.

Managing agenda approval

As organizer, you are responsible for creating an agenda for the meeting, but sometimes other people in the organization need to be involved in the process. MeetingBooster lets you send the finished agenda for approval to selected attendees and incorporate their suggestions and comments. If several cycles of approval are needed before the agenda can be finalized, you can even compare the different versions and undo changes between agenda versions individually.

- Make sure that you have set one or more meeting attendees to approve the agenda on the **Details** tab of the meeting.
- Save the meeting by clicking **Save**.
- On the **Agenda** tab, click **Request Approval** .

Note: The agenda is not sent for approval automatically, and the button only appears if you have set one or more attendees to approve the agenda. The meeting is saved and closed. Each attendee selected for agenda approval receives notification of the pending approval so that they can review, and then approve or reject the agenda.

As soon as an attendee either approves or rejects the agenda, possibly adding suggestions or comments to justify their decision, you receive an e-mail notifying you of their approval or rejection.



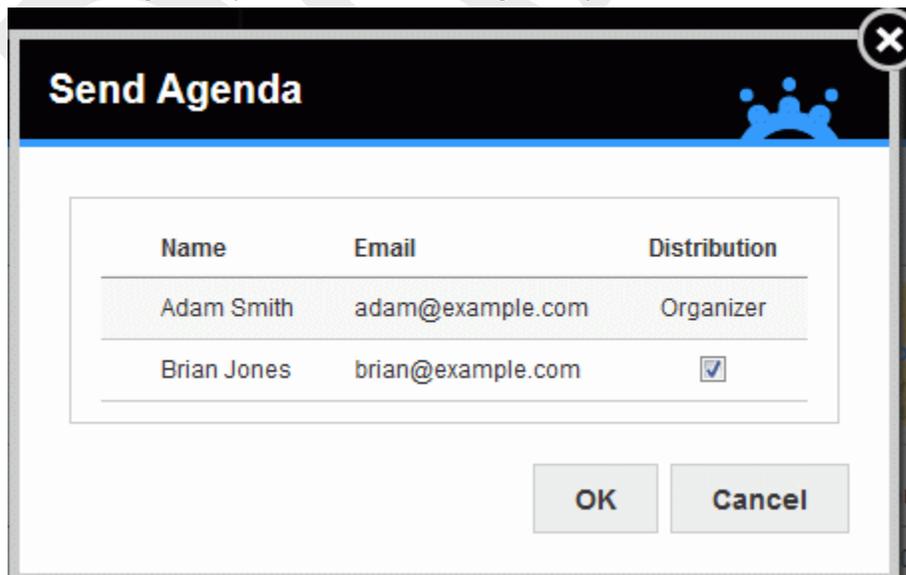
- Open the meeting again.
 1. If all the approvers have accepted the agenda, the meeting opens in view mode.
 2. If one or more approvers have rejected the agenda, the meeting opens in edit mode, so that you can make any necessary changes.
- (Optional) Compare the current agenda with previous versions if available.
- Review the attendee input, particularly if one or more attendees have rejected the agenda.
- If necessary, edit the agenda to take the approvers input into account.
- If you decide to limit the number of approvers, or conversely include new approvers, make the necessary changes on the **Details** tab.
- If you have made any changes to the meeting or agenda, click **Approval** and choose **Request Approval** to resend the agenda for approval, and repeat the process.
- Once the agenda has been accepted by all its approvers, send it to all the attendees.
- Save and close the meeting, which is now ready to be started at its appointed time.

Sending and printing an agenda

The agenda may be sent to all meeting attendees or printed to a PDF file for distribution before the meeting is started. This gives all attendees an opportunity to review the agenda, suggest topics and create tasks in relation to the meeting.

Sending an agenda

- Click **Send Agenda**  and choose **Send**.
- In the dialog that opens, check that the right recipients are selected.

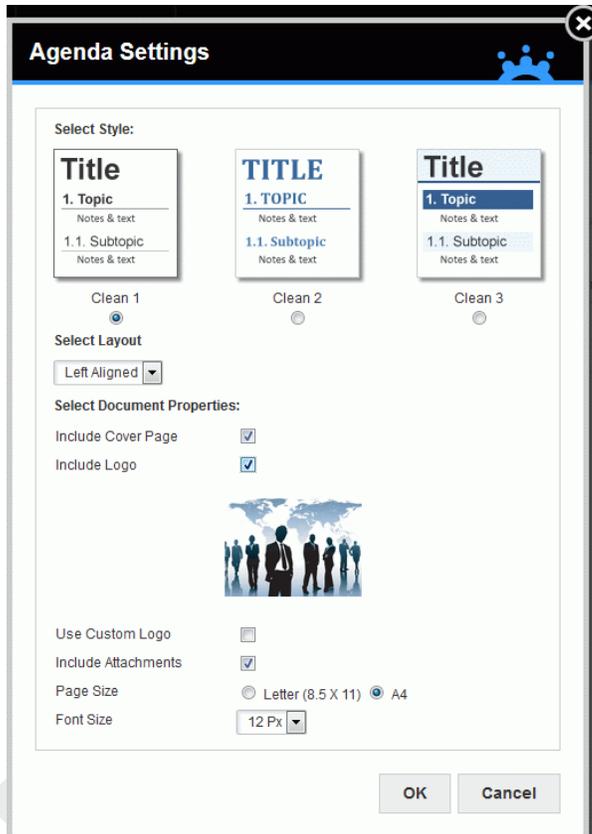




- Click **OK**.

Selecting agenda settings

- Click **Send Agenda**  and choose **Settings**.
- Select a style and layout for the agenda.



Agenda Settings

Select Style:

Title
1. Topic
Notes & text
1.1. Subtopic
Notes & text
Clean 1

TITLE
1. TOPIC
Notes & text
1.1. Subtopic
Notes & text
Clean 2

Title
1. Topic
Notes & text
1.1. Subtopic
Notes & text
Clean 3

Select Layout
Left Aligned

Select Document Properties:

Include Cover Page

Include Logo

Use Custom Logo

Include Attachments

Page Size
 Letter (8.5 X 11) A4

Font Size
12 Px

OK Cancel

- Select the **Include Cover Page** check box to include a cover page for the agenda. If you select this option, the **Include Logo** option becomes available.
- Select whether attachments should be included in the PDF file.

Note: Adding attachments can make the PDF file very large. Only select this option if the agenda attachments are fairly small, or if file size is not an issue.

- Select a page size and a font size for the agenda.
- Click **OK**.

Printing the agenda

- Click **Print All**  to save a PDF version of the agenda to your computer.



Editing a meeting

When a meeting has been scheduled and saved, all information in the meeting may be edited and updated.

- Attendees may add or edit tasks for the meeting, and they may provide topic suggestions and/or comments.
- The organizer may edit all information regarding the meeting.

Note: When you are editing a meeting, it is locked so that no one else can edit it. When you have saved your changes and closed the meeting, it is open for editing by other users with the appropriate permissions.

Accessing a meeting for editing

On the MeetingBooster site

- Click the meeting title under My Meetings.

From Microsoft Outlook

- In Microsoft Outlook 2010 and 2013, do one of the following:
 1. Select the meeting in the Calendar view, and click **Meeting Agenda**  or **Meeting Tasks**  in the ribbon.
 2. Right-click the meeting in the Calendar view, and click **Meeting Agenda**  or **Meeting Tasks** .
 3. Double-click the meeting in the Calendar view, and click the link in the dialog to go to the meeting site.

Editing options

The meeting editor is opened, and you may edit meeting details as necessary. Which details you may edit depends on your security role and your function in the meeting (i.e. organizer, co-organizer or regular attendee).

- On the **Details** tab, you may edit the meeting title, meeting purpose, location, schedule, screen sharing, meeting series, attendees and recurrence information.
- On the **Agenda** tab, you may edit the agenda.
- On the **Tasks** tab, you may edit preparation tasks for the meeting.

Note: Always remember to click **Save and Close** after editing any meeting details.



Creating a PDF with meeting details

It can sometimes be useful to create a PDF containing details for a meeting. For instance, this would allow you to study meeting details offline or send meeting details to someone outside the organization's MeetingBooster installation.

- Click **Print All**  in the top right corner.

A PDF containing meeting information such as date and time, attendees, agenda and tasks is created. Where it is saved on your computer depends on your browser and system settings.

Rescheduling a meeting

Both single meetings and recurring meetings may be rescheduled as long as they have not been executed.

From the MeetingBooster site

- Click the meeting title under My Meetings.
- Select a new date and new start and end times for the meeting.
If there may be a conflict with the meeting time selected, a warning icon is shown.
If the selected meeting time conflicts with the schedule of one or more of the selected attendees, a warning dialog is shown.
- Click **Save and Close**.

From Microsoft Outlook

- Open the meeting in the calendar.
- Select a new date and new start and end times for the meeting as you would normally do for meetings in the e-mail client.
If there may be a conflict with the meeting time selected, the e-mail client issues a warning.
Note, however, that the client will only be able to check its local calendar.
If the selected meeting time conflicts with the schedule of one or more of the selected attendees, a warning dialog is shown.
- Save and close the rescheduled meeting.

Deleting a meeting

Any meeting that has been scheduled but not executed may be deleted by the organizer who created it. In addition, an administrator or another user with a security role providing the necessary permissions may delete a past meeting; in other words, a meeting that has been executed and moved to the list of past meetings.



Deleting a meeting that has not been executed

From the MeetingBooster website

- To delete a one-off meeting or an instance of a recurring meeting, locate the meeting to be deleted in the list of meetings, and click **Delete**.

Meeting Title	Organizer	Date -	Time	Action	Status
Strategic direction meeting	Adam Smith	16/10/2013	11:00 - 13:00	Start Delete	Accepted
Weekly staff meeting	AS - Adam Smith	21/10/2013	12:00 - 14:00	Start Delete	Accepted

- To delete all instances of a recurring meeting, click **Recurrence**  to the left of the organizer name and select **Delete Recurrence** for one of the meetings.

Meeting Title	Organizer	Date -	Time	Action	Status
Strategic direction meeting	Adam Smith	16/10/2013	11:00 - 13:00	Start Delete	Accepted
Weekly staff meeting	AS  Edit Recurrence Delete Recurrence	21/10/2013	12:00 - 14:00	Start Delete	Accepted

From Microsoft Outlook

- Delete the MeetingBooster meeting from the calendar as normally. At the next synchronization, the meeting is also removed from the MeetingBooster website.

Deleting past meetings

This option requires special permissions, as described above.

- On the MeetingBooster website, click **Settings**  and select **Admin**.
- Click **Delete Past Meetings** in the menu.
- In the list of past meetings, locate the meeting to be deleted, and click **Delete**.

Starting a meeting

A scheduled meeting may be started from the MeetingBooster site or from Microsoft Outlook.

From the MeetingBooster site

- Locate the meeting in the list of meetings under My Meetings.
- Click **Start**.

From Microsoft Outlook



- Locate the meeting in the calendar, and do one of the following:
 1. Select the meeting, and click **Start Meeting** .
 2. Right-click the meeting, and click **Start Meeting** in the shortcut menu.

Initializing a meeting

After starting the meeting, the organizer must perform a few steps before entering the meeting workspace.

- Establish the screen sharing session

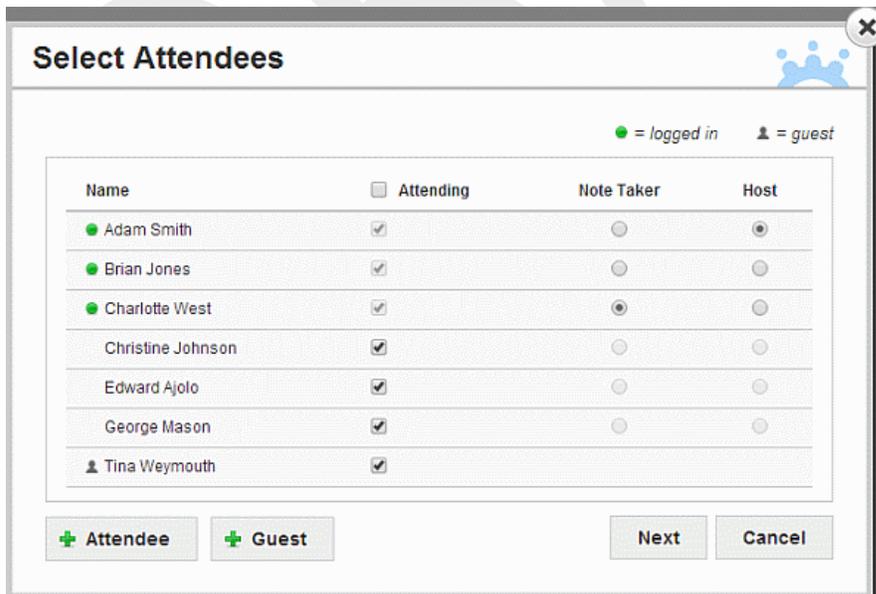
Note: The option to establish screen sharing is only offered if screen sharing was enabled for the meeting. For more information, see "[Setting up screen sharing](#)".

- Edit the agenda

Note: The option to edit the agenda is only offered if the agenda for the meeting contains time conflicts, or if an agenda was not created for the meeting prior to starting it.

- Select attendees

Check that the attendees required for the meeting are present. A green dot  next to an attendee's name means that the attendee has logged on to MeetingBooster and has joined the meeting. A black icon  next to an attendee's name means that the attendee is a guest.



Select Attendees

● = logged in 👤 = guest

Name	<input type="checkbox"/> Attending	Note Taker	Host
● Adam Smith	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>
● Brian Jones	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
● Charlotte West	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>
Christine Johnson	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
Edward Ajolo	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
George Mason	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
👤 Tina Weymouth	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>



- Review tasks

The option to review tasks is only offered if preparation tasks have been created for the meeting.

Hosting a meeting

The layout of the meeting workspace is the same whether you are participating in a meeting as a regular attendee or as an organizer. The organizer, however, has more options at his disposal than regular attendees.

Navigating from topic to topic

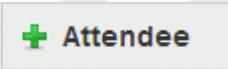
- Click **Next Topic**  or **Previous Topic**  to navigate from topic to topic in the agenda.
Or
- Click the topic name in the full agenda shown to the left.
Note: You must be host to do this.

Selecting a different note taker and host

By default, the organizer is also the note taker and host (unless someone else was appointed for these roles when initializing the meeting, but the organizer may assign the roles to other attendees during the meeting.

- Click **Attending**  and select a different note taker and/or host in the dialog that opens.

Adding attendees

- Click **Attending** 
- Click + **Attendee**  or + **Guest**  to add more attendees to the meeting if required.

Parking a topic

- Click **Parking**  to park a topic.

Taking meeting notes

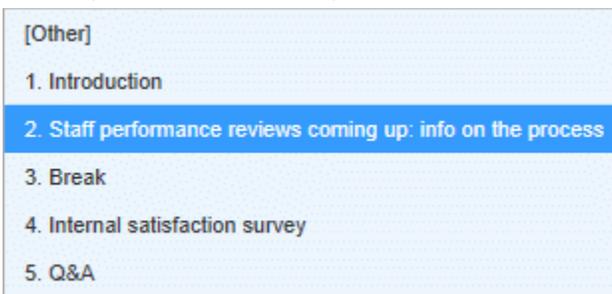
During the meeting, the note taker may take notes and enter conclusions for individual topics as well as the entire meeting. There are two types of notes that the note taker can take:



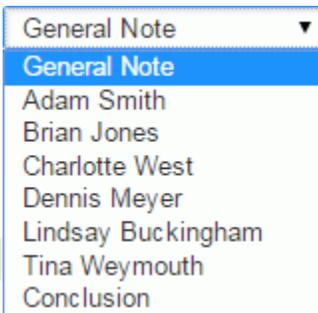
- **Meeting notes** that apply to the entire meeting, not an individual topic on the agenda
- **Topic notes** that apply to the current topic only

Entering notes or conclusions

- If this is the first note for the current topic, click **New Note** .
- To enter a meeting note, select **Other**. Otherwise, select the topic that the note applies to on the drop-down list at the top of the note card.



- On the drop-down to the left, select **General Note** if the note is a general note applying to all attendees, select the name of an attendee if the note applies to just this attendee, or select **Conclusion** if entering the conclusion for the topic.



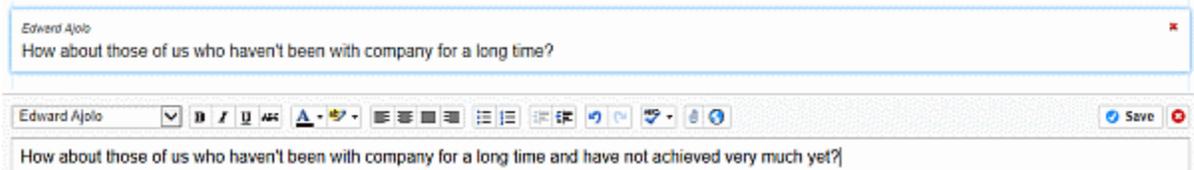
- Enter the note text.
- (Optional) Format the note text using the buttons at the top of the note editor.



- (Optional) Add attachments or hyperlinks
- Click **Save**  to save the note.

Editing a note or conclusion

- Click the note or conclusion to be edited.
- Edit and save the note or conclusion in the note editor.



Deleting a note or a conclusion

- Click the red cross  next to the note or conclusion to be deleted.

Adding attachments and hyperlinks to notes

During a meeting, you may add attachments and hyperlinks to websites or SharePoint servers in your topic notes or conclusions. All attendees will be able to view and click the links. An attachment may be any file type.

Adding an attachment

- Create or edit the note or conclusion that the attachment is to be added to.
- Click **Attachment**  in the toolbar of the note editor.
- Select the desired file using your browser.
- Save the note or conclusion.

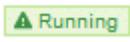
Adding a hyperlink

- Create or edit the note or conclusion that the hyperlink is to be added to.
- Click **Hyperlink**  in the toolbar of the note editor.
- On the drop-down list that opens, select **Hyperlink**.
- Enter a name and a URL for the hyperlink.
- Click OK.
- Save the note or conclusion.

Leaving or ending a meeting

When all topics have been covered, the organizer may end the meeting. In addition, the organizer may temporarily leave the meeting and come back later.

Leaving a meeting

- Click **Exit**  and select **Leave Meeting** to leave the meeting temporarily. In the My Meetings view, the meeting will be shown as running  in the list of meetings.



- Click **Join** to rejoin the meeting.

Ending a meeting

- Click **Exit**  and select **End Meeting** to end the meeting.

Note: When the meeting is ended, no more information can be added to the meeting. However, notes taken during the meeting may be edited by the organizer or note taker for a period of time defined by the administrator.

Managing meeting minutes approval

MeetingBooster lets you send meeting minutes for approval to ensure that key meeting attendees can accept the content before the minutes are filed for future use. Notes and conclusions are sometimes written hastily in the midst of busy meetings where the note taker is also focusing on other things, and the approval workflow is a good way of checking that no misunderstandings permanently find their way into the meeting minutes.

Selecting users for approving the meeting minutes

If you did not select any users for approving the meeting minutes when scheduling the meeting, you can do so after the meeting has ended. You can also edit the list of approvers by selecting other users from the organization's MeetingBooster installation, including users who did not attend the meeting.

If you do not need to select users or edit the list of approvers, proceed to "Sending the meeting minutes for approval" below.

- Click Request **Approval**.
If you have already designated users for approving the minutes, the button is called Approval and opens a submenu where you must select Edit Approvers.
A dialog opens where you can select one or more users.
- Click **Add User** to select users who must approve the meeting minutes.
- Click the cross icon ✕ next to a user to remove that user from the list of approvers.

Sending the meeting minutes for approval

- Click **Approval** .
- In the submenu that opens, select **Request Approval**.

Reviewing approvals, rejections and comments

As soon as an attendee either approves or rejects the minutes, possibly adding comments to justify their decision, you receive an e-mail notifying you of their approval or rejection.



- Open the minutes again.
- Click Attendee Input to review the attendee input, particularly if one or more attendees have rejected the minutes.
- Review the list of comments from the attendees, and then click **Read**  to mark the comment as read. If you click **Read** by accident, you can undo your decision by clicking **Revert** .
- If you have made any changes to the minutes, resend them for approval, and repeat the process.
- Once the minutes have been accepted by all their approvers, send them to all the attendees.

Editing and sending meeting minutes

The meeting minutes are displayed automatically after the meeting has ended and show the agenda (if any), information on date, time, purpose and attendees as well as all information entered by the note taker during the meeting.

Editing meeting minutes

Notes taken during meetings may be edited in the meeting minutes by the organizer or the note taker for a period of time defined by the administrator after the meeting ended. In this way, notes may be edited for accuracy and correctness before being saved in the organization's MeetingBooster system and used for further work.

- If the meeting minutes are not displayed, click the meeting whose minutes you want to edit under **Past Meetings**.
- From the meeting minutes ribbon, click **Edit** .
- Edit individual notes as desired, or click the red cross  to delete them.
- Click **New Note** or **New Conclusion**  to enter a new note or conclusion at the selected location in the meeting minutes.
- Click **Edit**  again to exit editing mode and save the minutes.

Sending meeting minutes for approval

To make sure that everybody agrees on the content of the meeting minutes, you can send them for approval. The process is similar to the process for approving agendas.

Sending meeting minutes to attendees

- Click **Send Minutes**  and choose **Send** to send the meeting minutes via e-mail to all attendees.



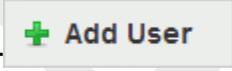
- In the dialog that opens, check that the right recipients are selected.
- Click **OK**.

Selecting meeting minute settings

- Click **Send Minutes**  and choose **Settings**.
- Select a style and layout for the minutes.
- Select whether attachments should be included in the PDF file.
- Select a page size and a font size for the meeting minutes.
- Click **OK**.

Giving viewing access to users who did not attend

You may give users who did not participate in the meeting access to the minutes.

- Click **Viewing Access** , click **+ Add User** , and select the users who should have viewing access on the list.

The users selected may now access the meeting minutes under **Past Meetings** on the MeetingBooster home page even though they did not attend the meeting.