



Creating Meeting Minutes

Meeting minutes are the live written record of a meeting. This information includes the list of attendees, related responses and final decisions taken to address any issues.

Create the Meeting Taking Minutes Update Meeting Items Create the Next Meeting in the Series Related Resources

Create the Meeting

1. Open the project.

ę	Projects -	Global search			Q	
	001		<, PT rice (NPS) ectteam.com			Edit Profile
		Action Items (0)	New	Recent Activity		
		Overdue	0	All Projects	~	

- 2. Open **Meetings** from the options that open after clicking on **Forms** in the left navigation pane.
- 3. Click the **New** button located in the top right corner.

Meetings shared with me	int
You have no Meetings yet	
Once you have access to Meetings, they will show here.	

4. To create the very first meeting in a series, click the **Create New** button.

Create New Meeting	Create Next Meeting
Create a new meeting that is unrelated to an existing meeting series. New meetings do not have any existing topics or items.	Create a meeting that is next in an existing meeting series. Ti next meeting in a series carries over all non-closed items.
Create New	Create Next

5. The meeting form will open. There are 3 required fields which will need to be completed to save the meeting document. The **Subject** is the meeting title, the **Meeting Series** will determine which series to assign future meetings to and the **Start Date and Time**. The remaining fields are optional but will add great value to any reports created for the project.

-					
DETAILS					
Subject					* Required
Type the Subject					
Meeting Series @					* Required
Type the Meeting Series					
Meeting # ⊕ 1					
Start Date/Time					* Required
					-
Location					
Type the Location					
Prepared By					
Purpose					
-> B I U S ♦ ¶ - ⊞	5 C 🖋 🎞				
1					
Invitees 🗷					🖉 Create New 🚥
Name	Phone Number		Email Address	Attended	
Discussion ()					Reorder Topics New Topic
		No Topics ha Add Topics before	ve been added yet. adding Meeting Items.		

6. Scroll to the **Invitees** section to enter a list of meeting invitees.

b	witees 💿			⊮ ^A Create New ■
	Name	Phone Number	Email Address	Attended

- 7. The **Add Invitees** window will open. Entering the **name** of a user who is already in the project directory will auto-populate the address and phone number fields. If the invitee is not in the project directory, manually enter this information.
- 8. Click the **Add & New** button to save the entry and select additional invitees or click the **Add** button to save and return to the meeting document.

Invitees	×
Add & Nev	v Add
	Invitees Add & Nev

9. To add multiple invitees at one time, use the import feature. Click the **ellipsis (three dot)** button and click **Import Rows**.

Invitees	Invitees 0					
	Name	Phone Number	Email Address	Attended	Import Rows	
~	Debra Rakes (ProjectTeam, Inc.)	(703) 961-1007	drakes@projectteam.com			
-	Susan Milis	(770) 655-5900	smills@projectteam.com			

10. The **Import Invitees** modal window will open. Click the **Download** button to open the Invitees import template.

	Import Invitees	×
1	Download template Download the template CSV file we've built which is ready for you to file in.	I
2	Prepare your data Use the template to fill in all the rows of the collection.	
3	Import rows Upload the CSV file into ProjectTeam.com. Upload	
Cancel		

- 11. Open the downloaded template.
- 12. Enter information in the applicable fields in the import document and save the document as a .csv file to a location on your computer.

Name	Phone Number	Email Address	Attended
John Smith	222-222-2222	john.smith@smithconstruction.com	
Sam Adams	321-123-1234	sam.adams@samadams.com	

13. Return to ProjectTeam and click **Upload** on the Import Invitees window.

	Import Invitees	×
1	Download template Download the template CSV file we've built which is ready for you to fill in. Download	
2	Prepare your data Use the template to fill in all the rows of the collection.	
3	Import rows Upload the CSV file into ProjectTeam.com. Upload	
Cancel		

If the information entered in the import document is correct, a successful confirmation notice will appear. Click the **Close** button to return to the meeting form.

Import Invitees	×
Import successful	
Perfect We found no errors during the import process. You've successfully imported 2 rows to the Invitees collection	
	Close

14. To reorder the Invitees, hover your mouse over the name of the attendee you would like to move up or down in the list. A crosshair pointer will appear. **Drag and drop** the name of the attendee in the list where you want them to appear.

Invitees	Invites ()					
	Name	Phone Number	Email Address	Attended		
-	Debra Rakes (ProjectTeam, Inc.)	(703) 961-1007	drakes@projectteam.com	By Phone		
-	Sam Adams	321-123-1234	sam.adams@samadams.com	By Phone		
-	John Smith	222-222-2222	john.smith@smithconstruction.com	In Person		

15 The Topics section is below the Attendees section. Before adding meeting items, topics must be added. Click the **New Topic** button.

Discussion 🕐		«* Reorder Topics	New Topic
	No Topics have been added yet. Add Topics before adding Meeting Items.		

16 The Add Topic window will open. Enter the **Topic** and click the **Add & New** button to save the topic and add another or click the **Add** button to save the topic and return to the meeting form.

	Add Topic	×
Topic Safety		
Cancel		Add & New Add

17 A separate line is added for each topic. To change the order of the topics, click the **Reorder** button.

Discussion @							Reorder Topics New Topic
	1 - Safety						Reorder Meeting Items New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
_							
× .	2 - General						Reorder Meeting Items New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
× .	3 - RFI Status						Reorder Meeting Items New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status

18 To reorder the topics, hover your mouse over the topic you would like to move up or down in the list. A crosshair pointer will appear. **Drag and drop** the topic in the list where you want them to appear.

	Reorder Topics	×
Orag and	drop the topics to reorder.	
Safety		
General	÷	
RFI Status		
Cancel		Save

19 Click the dropdown arrow beside the Save & Share button located in the top right corner of the meeting form. Click Save & Share to save the document and share with other project members or click the Save button to save the document without sharing. Save & New will allow you to create the next meeting within that set.

New Meeting		Save & Share 🔹
	Mitting One 68/55/2023	Save & Share
	Meeting Series T	Save & New
	Weekly Construction Meeting	
	Mening # 3	
	Start Bate/Time	
	07/09/2021 62:00 PM	
	Schefule Duration	
	30 minutes X	
	Location	
	Held Haue	

20 The Share this document modal window will open. Select the radio button to the left of the Share Group or User to share the Meeting with. The user can also use the **Apply distribution lists** if a distribution list has been created for sharing Meetings. Click **Share** at the bottom of the modal window to share the record.

		Share th	iis document		
Share '	To users Share To ema	ail			
Sear	:h	Q		Apply distribution li	sts
	Project Managers 🕐		ProjectTeam, Inc.		*
	ProjectTeam, Inc. 🕐		ProjectTeam, Inc.		
	Solution Guidance Corpo	oration 🕐	Solution Guidance Corporation		
	TRG Builders LLC 🕏		TRG Builders LLC		1
Users					d
	Name	Company		True Access 🕐	1
	Debra Rakes	ProjectTeam, Inc.		✓ Shared	
	Diane Urban	TRG Builders LLC			
-					-

Taking Minutes

1. Open the Meeting form log and click **the title of the meeting** to open the document.

Meetin	gs shared with me						New	Print
Show Larest Meetings Only								
	Subject 0	Meeting # 0	Start Date/Time 0	Scheduled Duration 0	Location 0	Created On -	Shared	
Meetin	series: GC Status Meeting GC Meeting	1	Tue, May 21, 2019 10:00 AM EDT	1 hour	Jobsite	5/23/19 9/26 AM	A 1	Ed.R.

2. Click the **Edit** button in the Details section.

Z DETAILS	Edit
Subject GC Meeting	
Mexing Series 0 GC Status Meeting	
Meeting # ⊗ 1	
Start Date/Time Tue, May 21, 2019 10:00 AM EDT	
Scheduled Duration	

- 3. Edit or update the information contained in the fields if needed.
- 4. To take attendance for the meeting, Check the box in the **Attended?** column beside the attendees' names.

Invitees () Create New ()						
			Name	Phone Number	Email Address	Attended?
		-	Amy Hribar	Type the Phone Number	amy_hribar@nps.gov	۵
		•	Aaron Vollbracht	Type the Phone Number	aaron_vollbracht@nps.gov	

5. Scroll to the Discussion section to add Meeting items. Select a topic and click the **New Meeting Items** button.

Discussion ()							
~	1 - General						Reorder Meeting Items New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
·	2 - RFI Status						Reorder Meeting Items New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
-	3 - Safety						Reorder Meeting Items New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status

6. Enter information about the meeting item fields. Press the **Add & New** button to add a new meeting item or the **Add** button to save the meeting item and return to the meeting form.

General - Add Meeting Items				
Item Name Sype the Item Name	This Meeting			
Pype the Rem Name Responsible Party	2 B J U & 4 9 - 田 田 % つ C			
Due Date				
Mtg Origin 1				
Priority				
Status Open X •				
Cancel	Add & New Add			

7. To reorder the meeting items within a topic, click the **Reorder Meeting Items** button.

-	1 - General						Reorder Meeting Items	New Meeting Items
		Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status	
*	1.1	Site Housekeeping	Susan Milis (ProjectTeam, Inc.)	05/23/2019	1	High X -	Open	x •
	2 B	I ∐ ÷ ≬ ¶- ⊯ ⊞	% ° °					
	Please ma	ke site housekeeping a priority. The site was c	overed in trash this weekend.					
This Meeting								
*	1.2	Building Permit	Debra Rakes (ProjectTeam, Inc.)	05/23/2019	1	High X -	Open	x •
	2 В	I ∐ \$ \$ ¶- ⊨ ≡	9 D C					
	с в	1 2 3 4 1 = =						
		ease complete the building permit request ap						

	Reorder Meeting Items	×
 Drag and drop 	the meeting items to reorder.	
Site Housekeeping Building Permit		
Cancel		Save

9. Click the dropdown arrow next to the **Save** button. Click **Save & Share** to share the meeting form or click the Save button to save the document without sharing.

Update Meeting Items

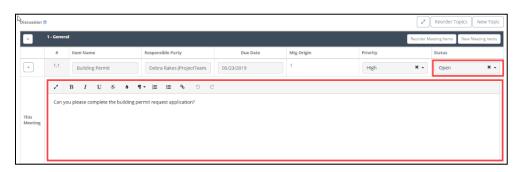
1. Open the Meeting form log and click **the title of the meeting** to open the document.

Meetin	gs shared with me						New Print
Show	Dow Latest Meetings City						
	Subject 0	Meeting # 0	Start Date/Time 0	Scheduled Duration 0	Location 0	Created Dn -	Shared
Meeting	Series: GC Status Meeting GC Meeting	1	Tue, May 21, 2019 10:00 AM EDT	1 hour	Jobsite	5/23/19 9:28 AM	1 1 Est

2. Click the **Edit** button in the Details section.

DETAILS			Edit
Subject GC Meeting			
Meeting Series () GC Status Meeting			
Meeting ≢ ⊕ 1			
Start Date/Time Tue, May 21, 2019 10:00 AM EDT			
Scheduled Duration 1 hour			
Location Jobsite			
Prepared By Susan Mills (ProjectTeam, Inc.)			
Purpose Weekly GC Status Meeting			
Invitees 🖲			~
Name	Phone Number	Email Address	Attended
Debra Rakes (ProjectTeam, Inc.)	(703) 961-1007	drakes@projectteam.com	
Susan Mills	(770) 655-5900	smils@projectteam.com	
John Smith	222-222-2222	john.smith@smithconstruction.com	
Sam Adams	321-123-1234	sam.adams@samadams.com	

3. Add additional notes in the **This Meeting** section. To change the status of the meeting item, click the **Status** dropdown and choose the new status.



4. Click the dropdown arrow next to the Save button. Click **Save & Share** to share the meeting form or click the **Save** button to save the document without sharing.

Create the Next Meeting in the Series

1. Click the **New** button in the top right corner of the Meetings Shared with Me log.

Meet	ings shared with me						New Print)
Sho	Show Latest Meetings Only							
	Subject \diamond	Meeting # ¢	Start Date/Time 😄	Scheduled Duration \protect	Location \Diamond	Created On +	Shared	
Meet	Meeting Series: GC Status Meeting							
	GC Meeting	1	Tue, May 21, 2019 10:00 AM EDT	1 hour	Jobsite	5/23/19 9:26 AM	∎1 Ed	dit

- 2. In the **Create Next Meeting** section, click the dropdown and select the **meeting set** to apply to the new meeting.
- 3. Click the **Create Next** button.

	×
Create New Meeting	Create Next Meeting
Create a new meeting that is unrelated to an existing meeting series. New meetings do not have any existing topics or items.	Create a meeting that is next in an existing meeting series. The next meeting in a series carries over all non-closed items.
* <u>**</u> +	
Create New	GC Status Meeting Create Next

4. The Details window will open. Note the new meeting number has increased. All fields are populated with the meeting information with the exception of the **Start Date/Time**. Enter the required information in this field, update the other fields and **Save & Share** or **Save** the meeting.

Z DETAILS	
Subject	
GC Meeting	
Meeting Series ()	
GC Starus Meeting	
Hercing # ⊕ 2	
	* Required
Start Date/Time	- Nedolleo
Scheduled Duration	
1 hour	× -
Location	
Jobshe	
Prepared By	
Susan Milis (ProjectTeam, Inc.)	
hurses ∠ B I Σ 6 4 ¶+ B ⊞ % 0 C	
Weekly GC Status Meeting	

5. Follow the instructions in the earlier sections of this QRG to **add/edit Invitees**, **Topic** and **Meeting Items**.

Related Resources

- Help Center Links
 - <u>Create a Meeting (projectteam.com)</u>
 - o <u>Create the Next Meeting in a Series (projectteam.com)</u>

• QRGs and Training Videos

- Project Directory
- Sharing Records
- Initiating and Completing a Workflow
- Adding Attachments
- Creating Action Items
- Making Comments
- Adding Reference links
- Running Reports
- File Management Overview
- Photo Management