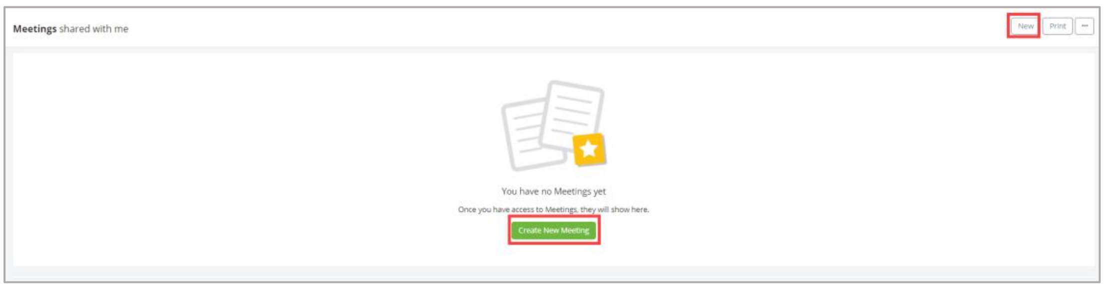
Meetings

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.

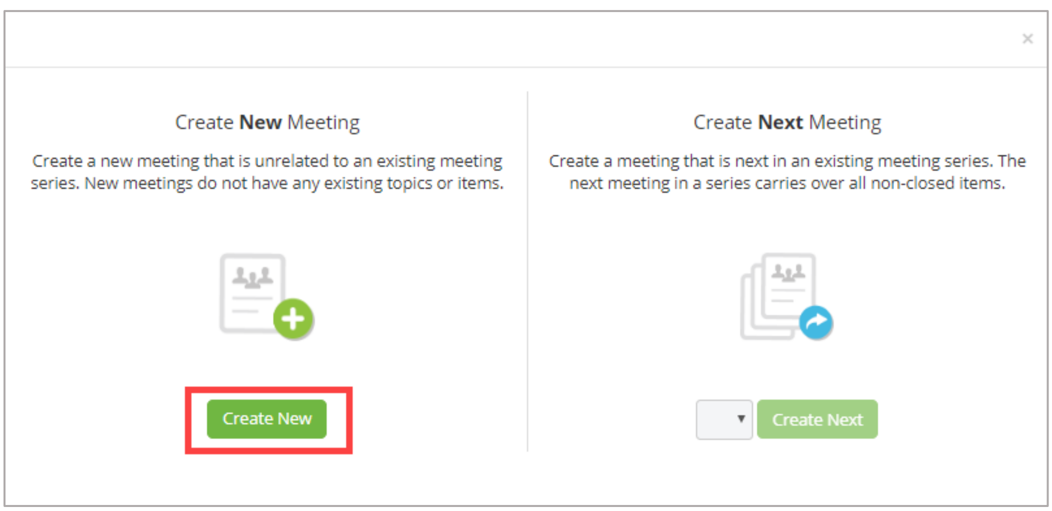
Create a New Meeting

1. Navigate to the Meeting log within a project.

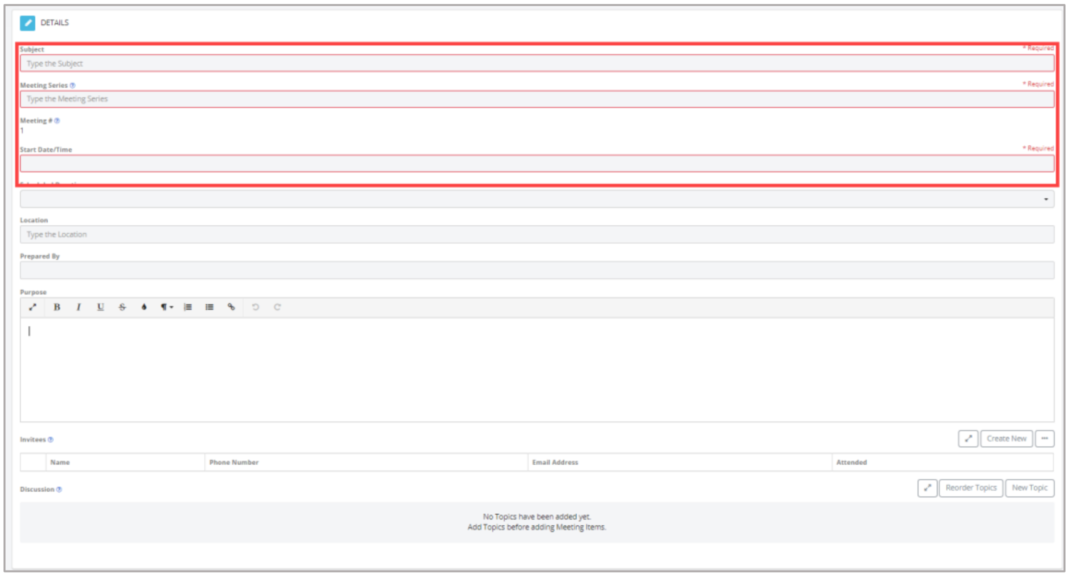
2. Click the New button on the top of the Meeting log.



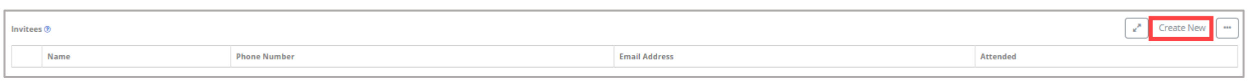
3. To create the very first meeting, click the **Create New** button.



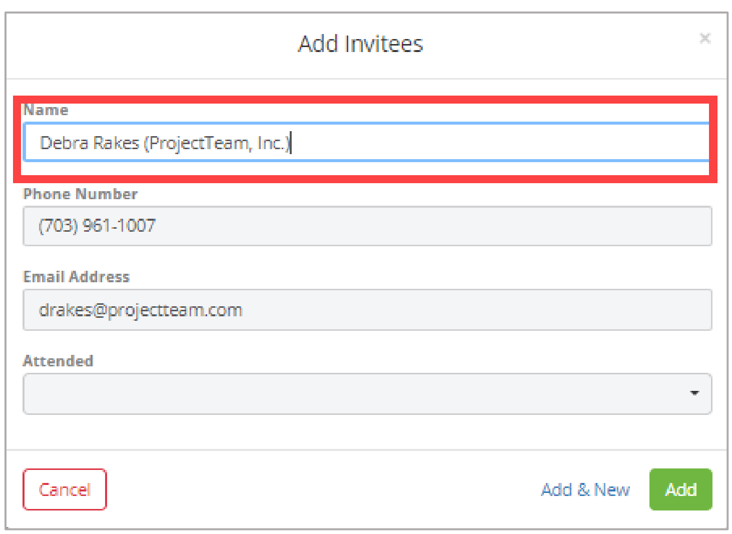
4. The meeting form will open. There are 3 required fields which will need to be completed to save the meeting document. The **Subject** is the meeting title, the **Meeting Series** will determine which series to assign future meetings to and the **Start Date and Time**. The remaining fields are optional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



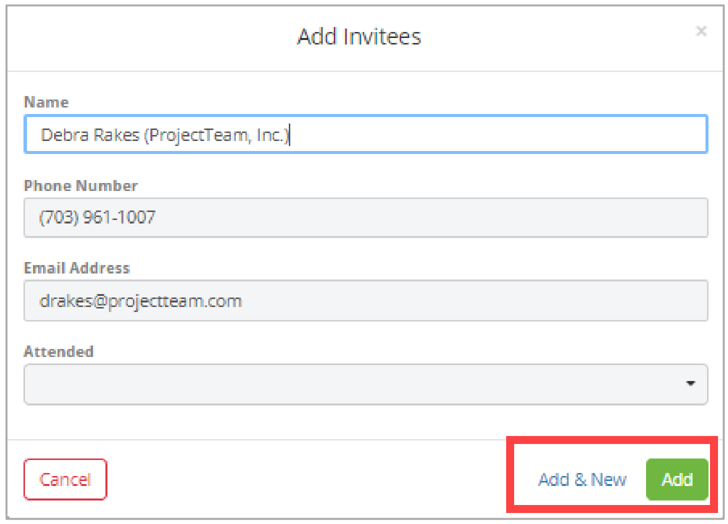
5. Scroll to the **Invitees** section to enter a list of meeting invitees.



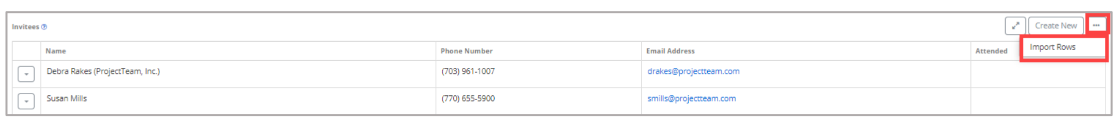
6. The **Add Invitees** modal window will open. Entering the **name** of a user who is already in the project directory will auto populate the address and phone number fields. If the invitee is not in the project directory, manually enter this information.



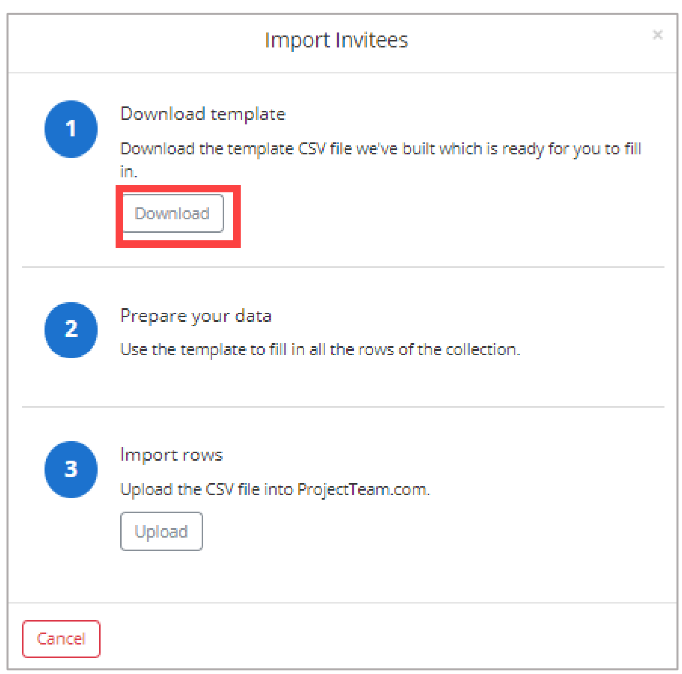
7. Click the **Add & New** button to save the entry and add a new invitee or click the **Add** button to save the invitee and return to the meeting document.



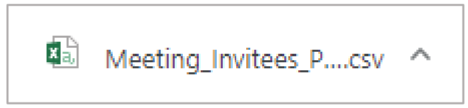
8. To add multiple invitees at one time, use the import feature. Click the **ellipsis (three dot)** button and click **Import Rows**.



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



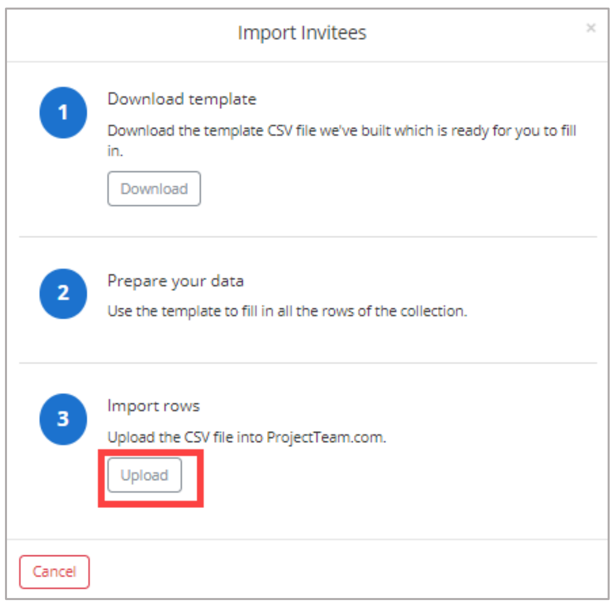
10. Open the downloaded template.



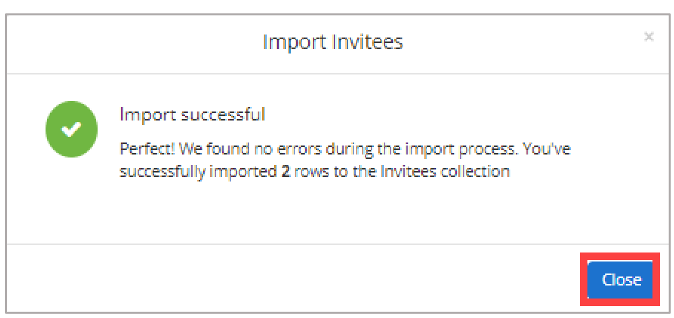
11. Enter information in the applicable fields in the import document and save the document as a .csv file to a location on your computer.

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

12. Return to ProjectTeam and press the **Upload** button on the Import Invitees modal window.

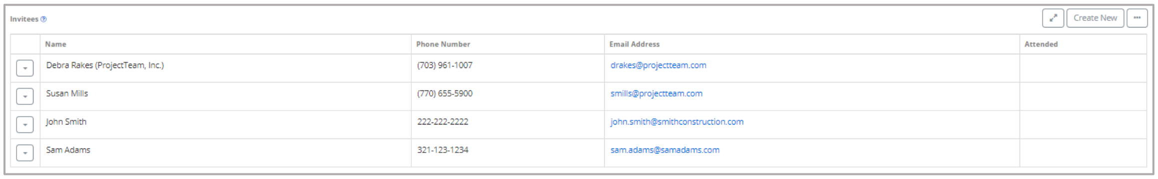


13. If the information entered in the import document is correct, a successful confirmation notice will appear. Click the **Close** button to return to the meeting form.

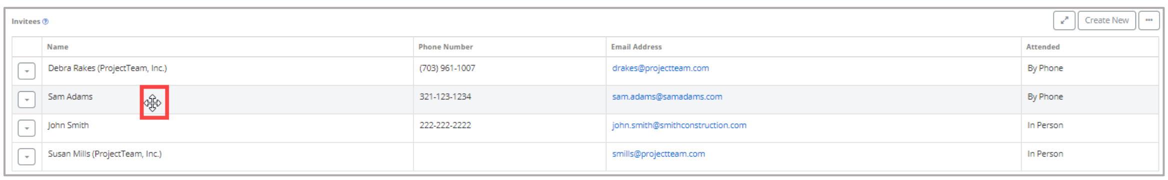


Note: If an error message is provided, return to the import document and make the required corrections and reimport the updated template.

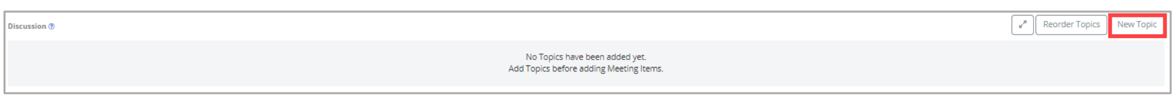
14. The imported attendees will appear in the collection.



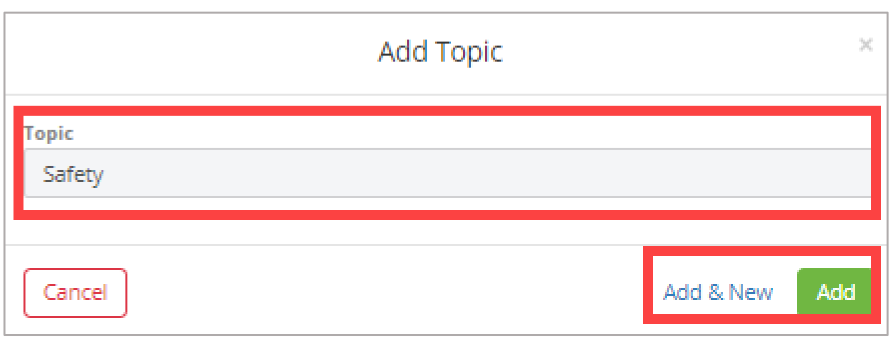
15. To reorder the Invitees, hover your mouse over the name of the attendee you would like to move up or down in the list. A crosshair pointer will appear. **Drag and drop** the name of the attendee in the list where you want them to appear.



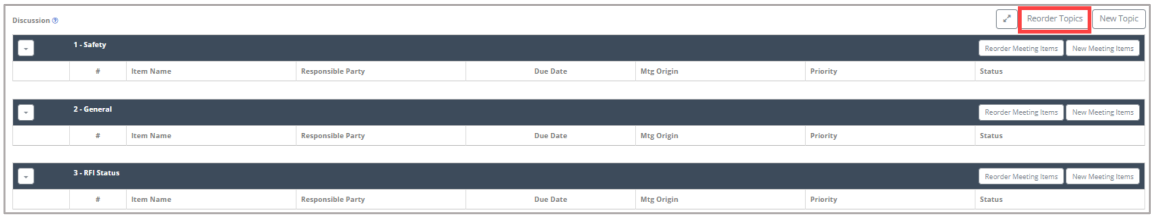
16. The Topics section is below the Attendees section. Before adding meeting items, topics must be added. Click the **New Topic** button.



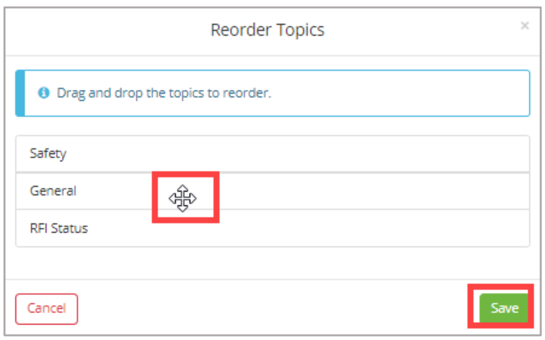
17. The Add Topic modal window will open. Enter the **Topic** and click the **Add & New** button to save the topic and add another or click the **Add** button to save the topic and return to the meeting form.



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

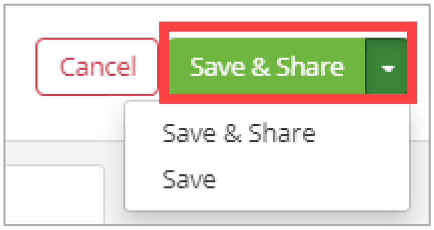


19. To reorder the topics, hover your mouse over the topic you would like to move up or down in the list. A crosshair pointer will appear. **Drag and drop** the topic in the list where you want them to appear.

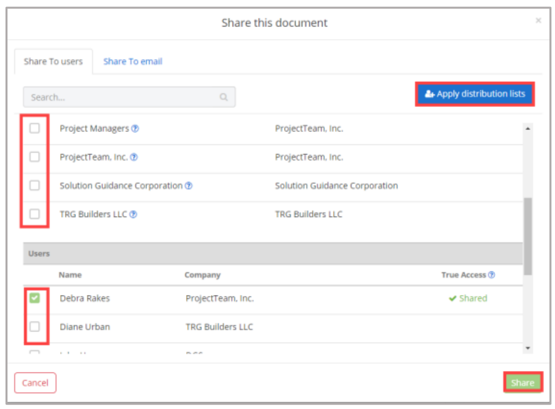


20. Click the dropdown arrow beside the **Save & Share** button located in the top right corner of the meeting form. Click **Save & Share** to save the document and share with other project members or click the **Save** button to save the document without sharing.

21. Click the dropdown arrow beside the **Save & Share** button located in the top right corner. Click **Save & Share** to save the document and share with other team members or click the **Save** button to save without granting access to the drawing package.

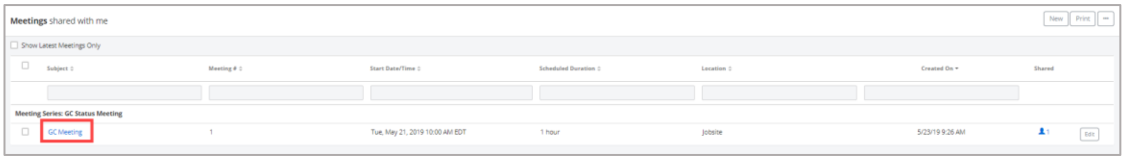


22. The Share this document modal window will open. Select the radio button to the left of the Share Group or User to share the Meeting with. The user can also use the **Apply distribution lists** if a distribution list has been created for sharing Meetings. Click **Share** at the bottom of the modal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

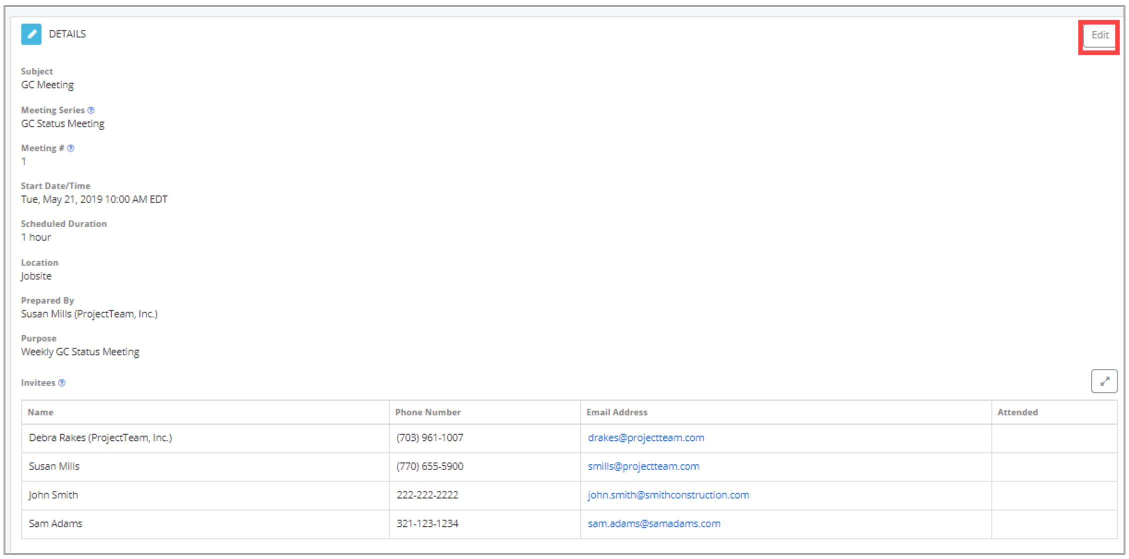


Taking Minutes

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

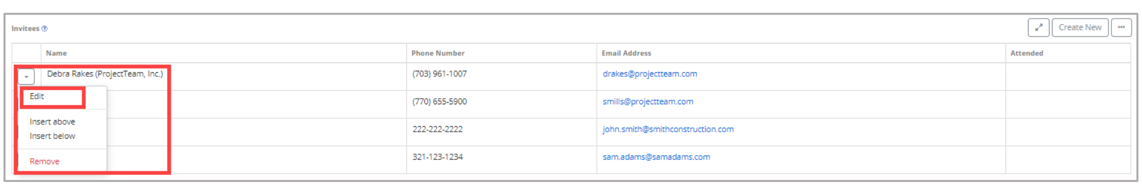


2. Click the **Edit** button in the Details section.

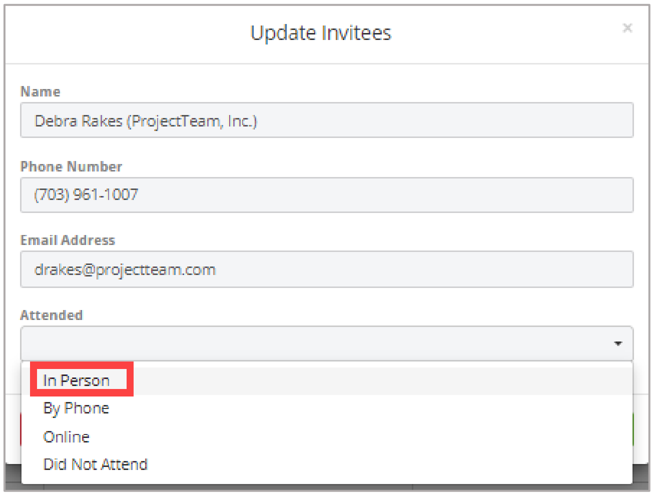


3. Edit or update the information contained in the fields if needed.

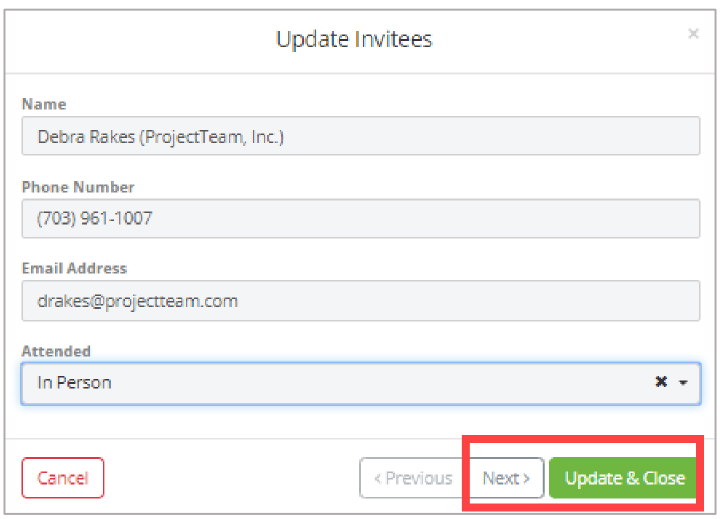
4. To take attendance for the meeting, click the dropdown arrow beside the **name of each invitee** and click the **Edit** button.



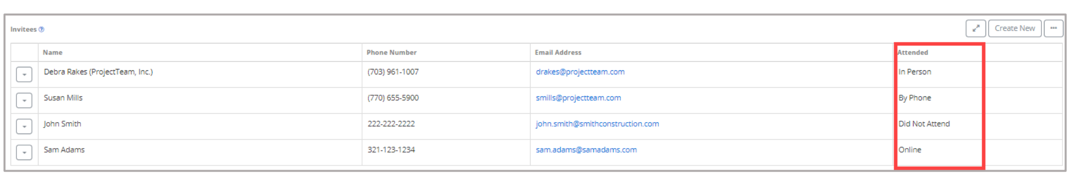
5. The Update Invitees modal window will open. Click the **Attended dropdown arrow** and click the **attended option** which applies to the invitee.



6. To update the next invitee in the list, click the **Next** button. Once all invitees are updated, click the **Update & Close** button.



7. The **Attended column** will update with the newly added information.

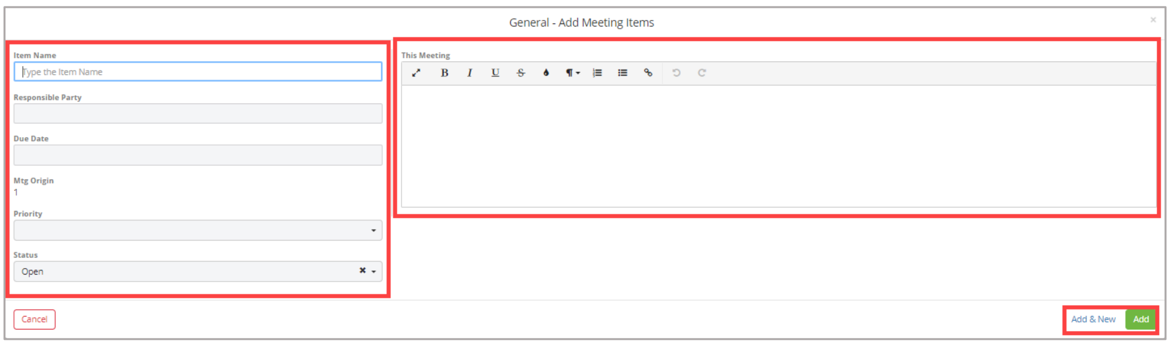


Invitees

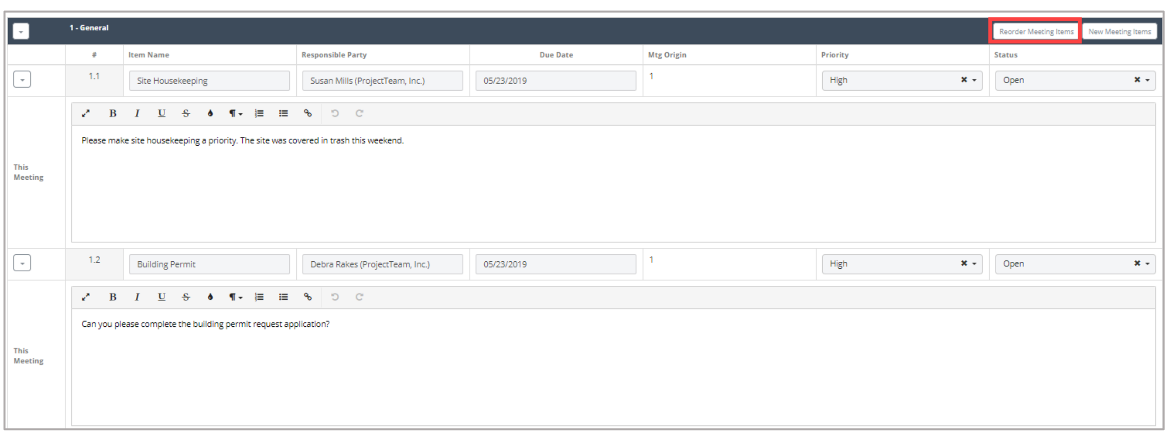
Name	Phone Number	Email Address	Attended
Debra Rakes (ProjectTeam, Inc.)	(703) 961-1007	drakes@projectteam.com	In Person
Susan Mills	(770) 655-5900	smills@projectteam.com	By Phone
John Smith	222-222-2222	john.smith@smithconstruction.com	Did Not Attend
Sam Adams	321-123-1234	sam.adams@samadams.com	Online

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

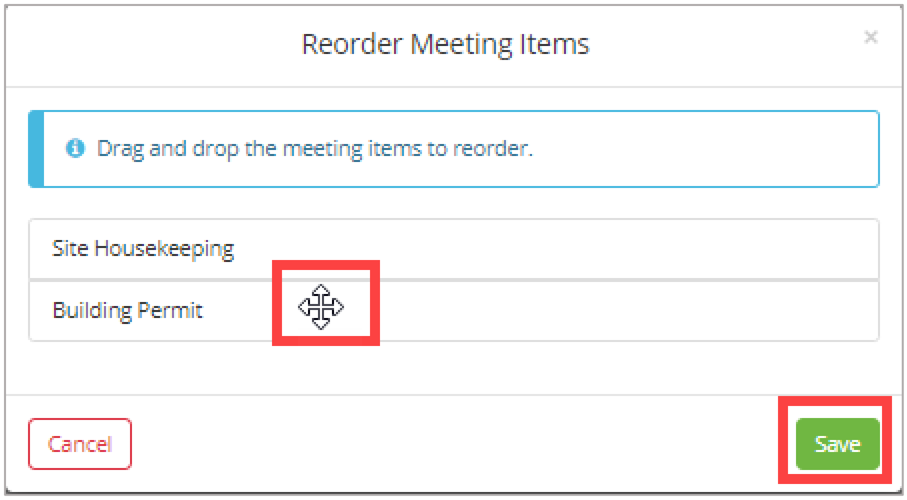
9. Enter information about the meeting item fields. Press the **Add & New** button to add a new meeting item or the **Add** button to save the meeting item and return to the meeting form.



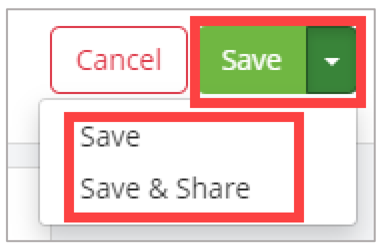
10. To reorder the meeting items within a topic, click the **Reorder Meeting Items** button.



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

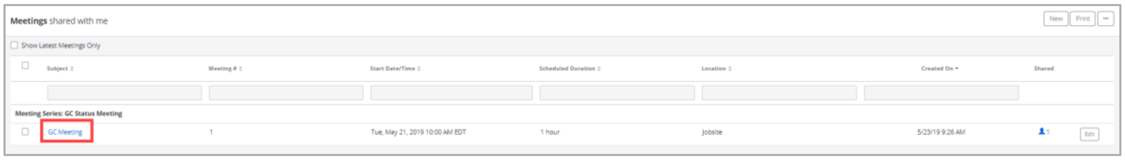


12. Click the dropdown arrow next to the **Save** button. Click **Save & Share** to share the meeting form or click the Save button to save the document without sharing.

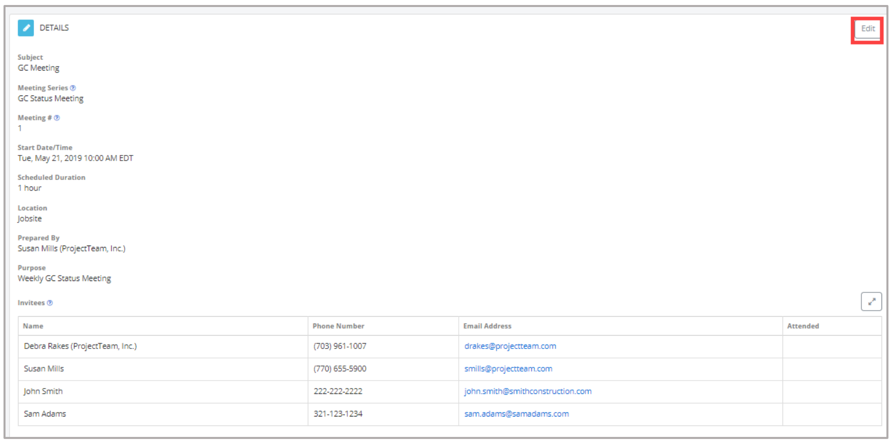


Update Meeting Items

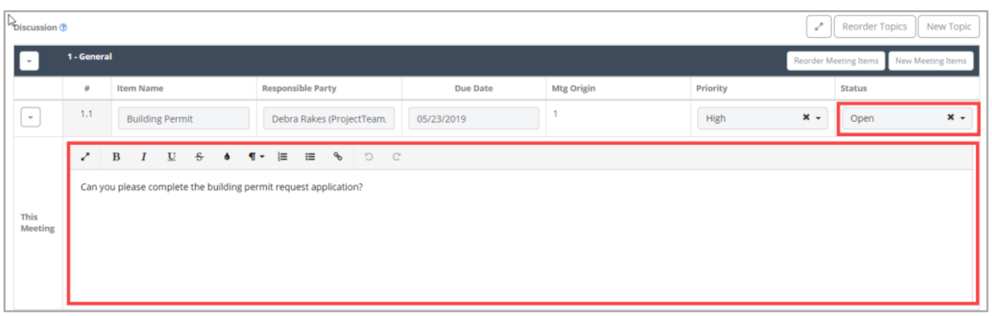
1. Open the Meeting form log and click **the title of the meeting** to open the document.



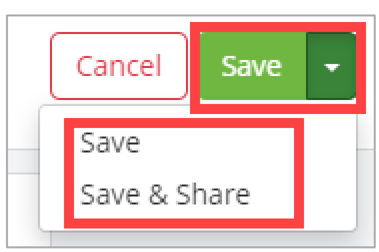
2. Click the **Edit** button in the Details section.



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.

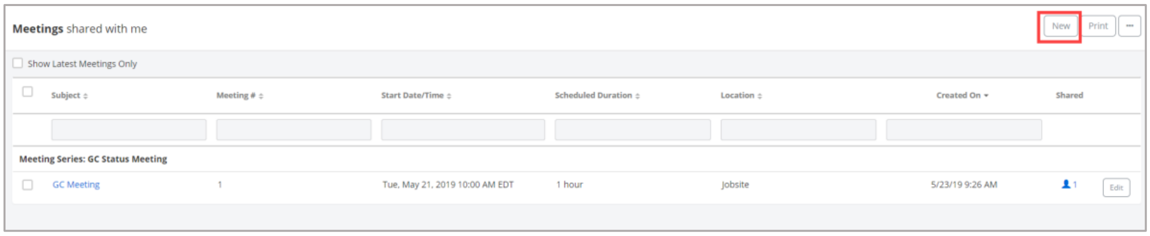


4. Click the dropdown arrow next to the Save button. Click **Save & Share** to share the meeting form or click the **Save** button to save the document without sharing.

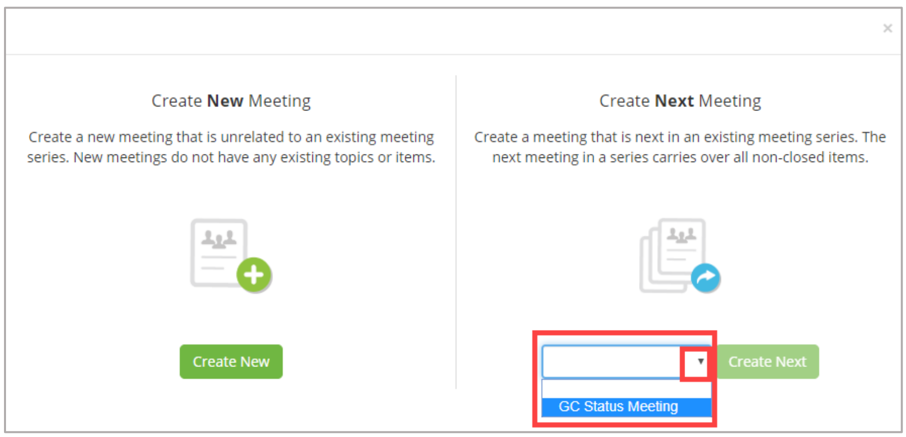


Create the Next Meeting in the Series

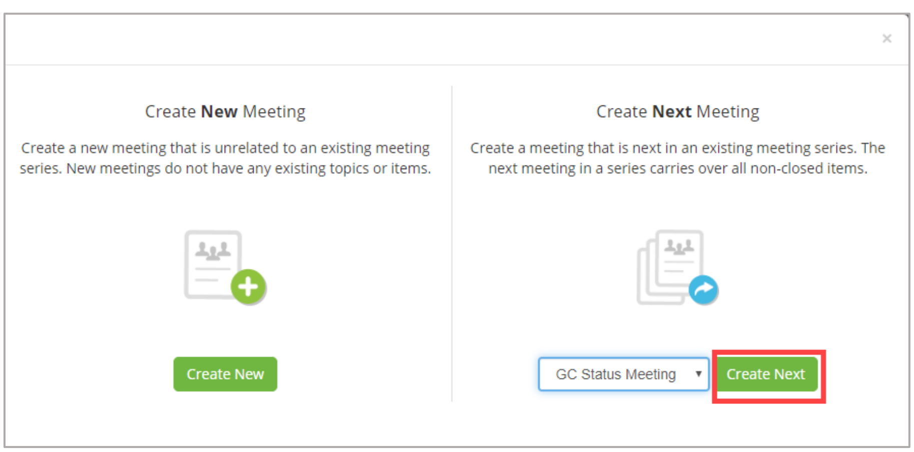
1. Click the **New** button in the top right corner of the Meetings Shared with Me log.



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.



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.

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