



ENABLE 365 - Agenda

Save time with effective meetings

AGENDA

User Manual

Introduction

Take control of your meetings with Enable 365 Agenda Meeting App

Agenda is a Microsoft Teams app to help you conduct meetings efficiently. With Agenda, meeting management will become easy, as you will have support from planning to execution and after-meeting tasks, such as distributing minutes.

After you have purchased Agenda for your business, it is ready to use on one or more Teams, depending on your license.

This guide describes how to use Agenda for all Your meetings.

Good luck!



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Table of contents

Introduction	2
Create meetings	4
Create a new meeting from scratch	4
Send a meeting invite to the attendees.	4
Meeting participants	5
Create cases	6
Title	6
Category	6
Time (minutes)	6
Description, summary, and decision	7
Responsible	7
Other (guest) participants	7
Supporting documents/attachments	7
Example of a scheduled meeting	8
Create a meeting based on a template	8
Edit a meeting	8
Change the meeting request for attendees	8
Publish the agenda/schedule as a PDF file	9
Open the generated agenda/schedule	9
Replace the agenda/schedule	9
Conduct meetings	10
Keep track of attendance	10
Case management	10
I am writing minutes/summaries.	10
Create tasks related to a case.	11
Supporting documents/attachments	11
Delete a case.	11
Remove a case from the meeting.	11
Forward a case to a later meeting.	12
Post meetings	13
Follow-up of tasks	13
Publish the report/minutes as a PDF file	13
Find the finished report	14
Replace report	14
Cases that are not planned in a meeting	15
Case processing	15
Put cases in the right place in the agenda	15
Delete meetings	16

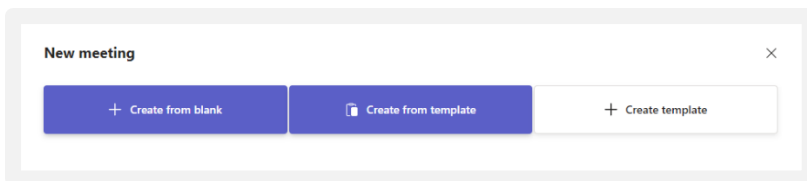
Create meetings

Meetings can either be created from scratch or a template. The procedure is similar, but using a template will save time making recurring meetings that should have the same cases, setup, and participants.

Tip! If you want to create a template, this is described in the Agenda-Setup guide.

In the following chapter, we have described how to create a new meeting from scratch.

Create a new meeting from scratch



Click "Create meeting" and then "Create from blank."

Send a meeting invite to the attendees

You can also send a meeting invite when creating a meeting. Check the "Create an event in group calendar" option, and if applicable, the "Teams meeting" if necessary (not all meetings are team meetings). When you save the meeting, all participants will get an invite from the group calendar.

Note! This option is only available when creating a new meeting. If you do not have this option, ask your admin to approve the app to connect it to the calendar feature.

Then fill in the title, time, and location.

Tip! Feel free to enter the date before or behind the title; it will be easier to find the meeting later.

Meeting participants

If there are regular participants for all meetings, they will appear as suggested participants automatically, but you can also choose to add/remove participants for a particular meeting.

Tip! If you want to add default participants for all meetings in a team, see the [Agenda Setup guide](#).

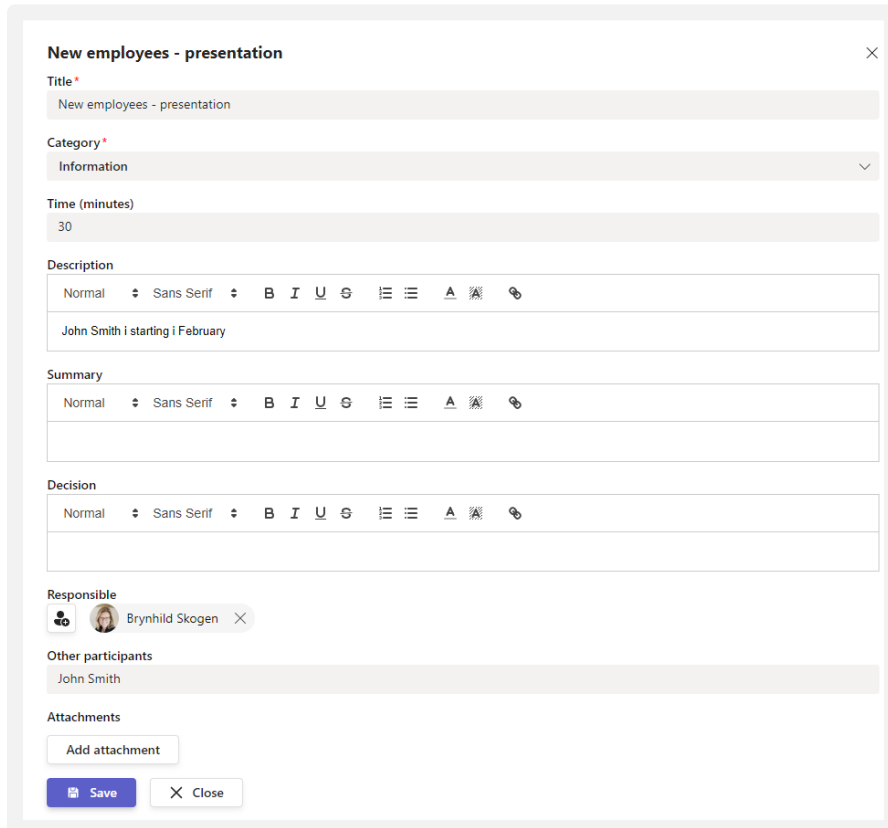
Save the meeting when you are done.

The figure below shows the new meeting ready for adding cases.

Notice a link at the top of the Teams meeting, and the participants appear in the panel on the right.

Create cases

You are only obliged to fill in the Title and Category, but you may also want to consider the other choices. See the explanation of all the fields below the image.



The image shows a screenshot of a meeting creation form titled "New employees - presentation". The form includes the following fields and options:

- Title ***: A text input field containing "New employees - presentation".
- Category ***: A dropdown menu with "Information" selected.
- Time (minutes)**: A text input field containing "30".
- Description**: A rich text editor with a toolbar (Normal, Sans Serif, Bold, Italic, Underline, Link, List, Text Color, Background Color) and the text "John Smith i starting i February".
- Summary**: A rich text editor with the same toolbar and an empty text area.
- Decision**: A rich text editor with the same toolbar and an empty text area.
- Responsible**: A dropdown menu showing a profile picture and the name "Brynhild Skogen".
- Other participants**: A text input field containing "John Smith".
- Attachments**: A button labeled "Add attachment".
- At the bottom, there are "Save" and "Close" buttons.

Title

Fill in the title of the meeting, preferably in connection with the date in front / behind.

Category

Choose what type of case it is. If you want to change/add categories, you can find a description of how to do that in the Agenda Setup guide.

Time (minutes)

By specifying the time (minutes) for a case, you automatically will calculate the start time of the following case. If you change the order, the times will be automatically recalculated.

Note! If you delete the content in the time field, the cases will only be placed in order. This can be a good choice for some types of meetings.

Description, summary, and decision

These fields are edited in the same way and support simple formatting. For example, in the Description field, you can fill in some background information for the case.

Responsible

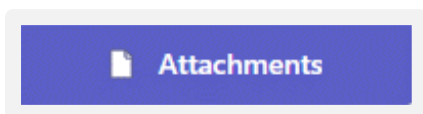
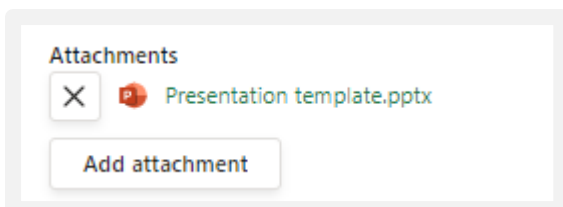
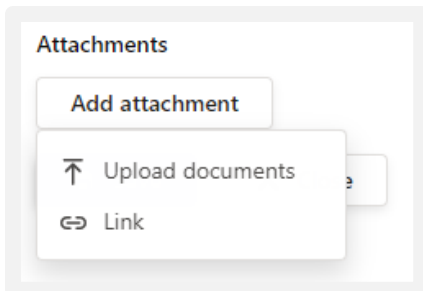
Enter the person responsible for the case.

Other (guest) participants

If someone who does not have a user on your Microsoft 365 tenant is attending a case, you can enter their name as plain text.

Supporting documents/attachments

You can choose uploading (the file will be uploaded to the library “AgendaDocuments” on your team and only available to team members), or linking to an existing file, which can be in a location where there is reading access for everyone (Intranet).



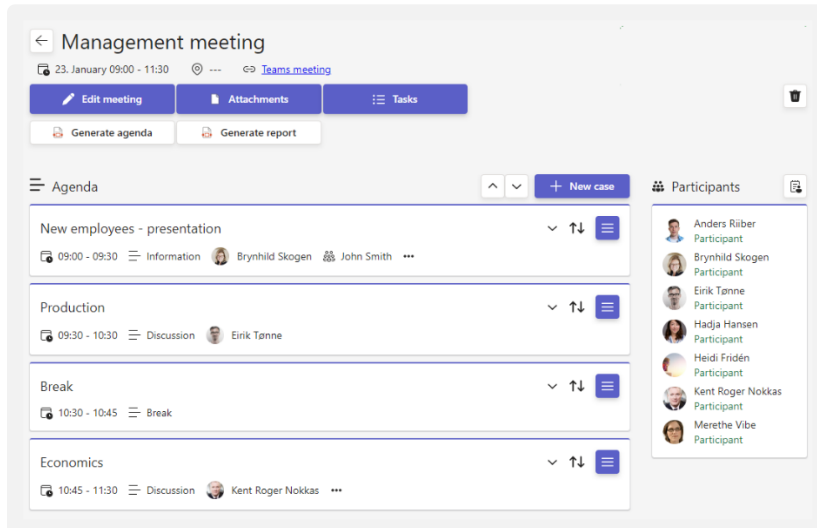
Case documents are entered and displayed per. case, but you will also find case documents for one meeting gathered under "Attachments."

Delete/remove attachments

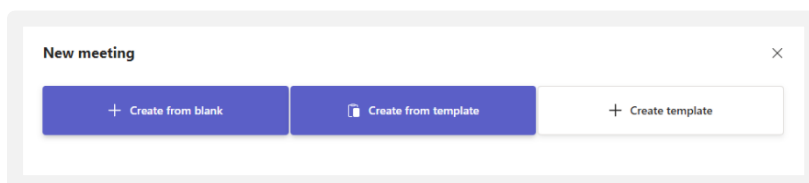
If you need to remove an attachment, you can edit the case it is posted to. The linked attachments will still be available in the original location, while uploaded attachments will be deleted.

Example of a scheduled meeting

The cases are presented as a list view, where everyone can see who is responsible and the type of case. The three dots on the first and last case indicate that information has been added.



Create a meeting based on a template



Select "Create from a template" and the template you want to use.

Tip! See the Agenda-setup guide to see how to create templates.

The meeting will consist of all the participants, and the cases that exists in the template. After the meeting is created, you can customize the meeting in the same way as for meetings based on the "Create from blank" option.

Edit a meeting

Click to open the meeting. Select the "Edit meeting" button. Here you can change the title, time, location, and participants.

Change the meeting request for attendees

If you change the start or end time, a newly updated invite will be issued to the participants.

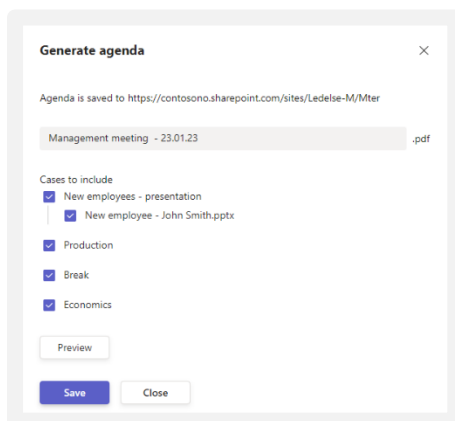
Publish the agenda/schedule as a PDF file

The agenda/schedule will be saved as a PDF, either in a library on the team or in a library on your intranet, depending on what's specified in the settings.

Tip! See the [Agenda-Setup](#) guide for how to configure saving files from Agenda.

When you select "Generate agenda," you will get a dialog box with the following information and choices:

1. If you have set an alternate location for the agenda, you will see the address at the top of the dialog box.
2. Enter file name - The meeting title and date will appear as suggestions, but you can edit this as you wish.
3. Choose which meeting cases to include in the minutes.
4. Choose which attachments to include in the minutes. Attachments are placed under a heading at the bottom of each case.
5. You can preview the agenda before selecting "Save."



Open the generated agenda/schedule

The "Open Agenda" button gives you a quick way to go to the finished agenda.

Replace the agenda/schedule

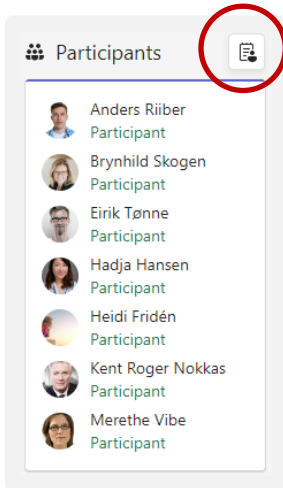
You can't save the agenda with the same name as an existing one, but you can always create new ones with a new name.

Tip! If you want to replace an agenda, you must go to the folder where the original agenda is located, delete it, and create a new one.

Conduct meetings

Keep track of attendance

Select the button to the right, and deselect the people who were not present at the meeting. Attendance will also be highlighted in the minutes.



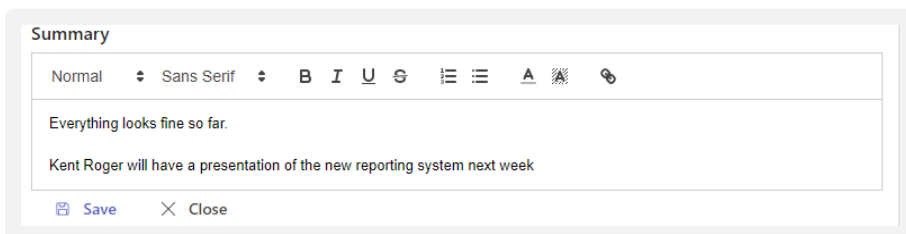
Case management

Open a case to work on it.

I am writing minutes/summaries

Write minutes in the description, summary, or decision fields. The fields will expand automatically.

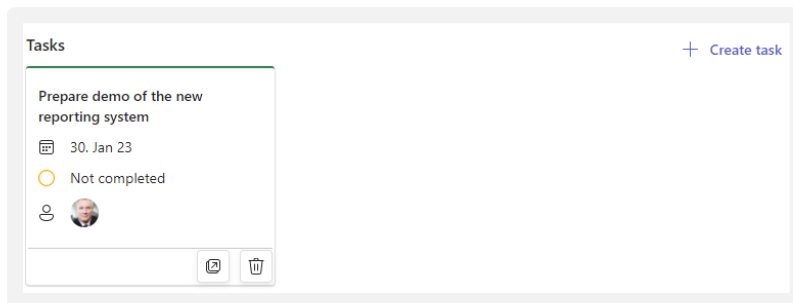
Note! The text fields only support simple formatting.



Remember to save when you are done.

Create tasks related to a case

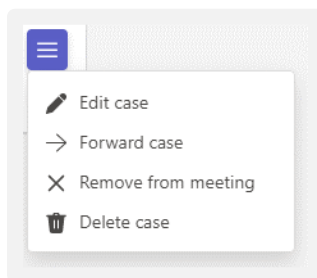
If you create tasks during a meeting, the people assigned will be reminded before the Due date. Open the case and scroll down until you see the option " + Create task."



Fill in the title, due date, description, and who will be responsible for the assignment. Once you have saved the task, it will appear at the bottom of the case.

Supporting documents/attachments

Go to the action menu for the case and select "Edit case." There you will see the option "Attachments" at the bottom, in the same way as when you created the case.



If necessary, see the description of case documents/attachments in the section about creating a case.

Delete a case

Select "Delete case" under the action menu.

Important! Deletion of a case will also delete any attachments related to the case.

Remove a case from the meeting

Select "Remove from meeting" under the action menu. When a case is removed from a meeting, it ends up in the list of cases without a meeting. See a separate chapter about case processing to learn how to move cases to upcoming meetings.

Forward a case to a later meeting

It may happen in some meetings that a case needs to be postponed to a later meeting. This meeting must be created before the case can be put there.

In the event of continuation, the content of the case, such as names, comments, etc., will be included so that you can pick up where you left off, only on a new date.

1. Select "Forward case" under the action menu.
2. Select the meeting to be forwarded to.
3. An arrow symbolizes that the meeting has been forwarded, and in the action menu, you now have the option to go to the current (last) meeting for the case.
4. The chairperson must then place the case at the desired time in the new meeting.

Post meetings

Follow-up of tasks

You can find the tasks under the case or via the "Tasks" button at the top of the meeting. The tasks will also be available via the "Tasks provided by Planner and To Do" app, which can be reached in the left navigation bar in Teams. If you don't have this button, you can add it through the dot menu. Here you get an overview of all your tasks from all the teams you are part of.

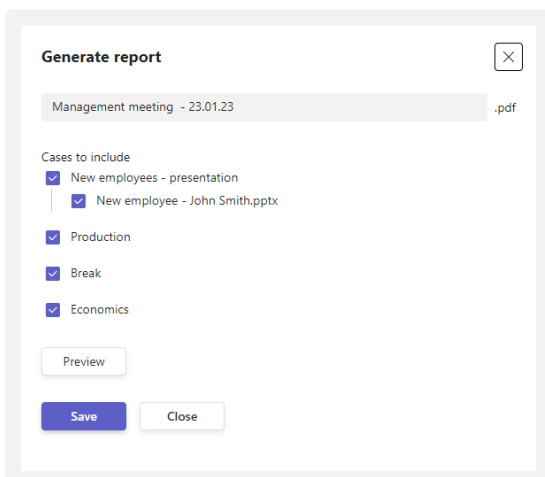
Publish the report/minutes as a PDF file

Report/Minutes are saved as a PDF file, either in a team library or in a library on your intranet, depending on what's specified in settings.

Tip! See the Agenda-Setup guide for how to configure saving files from Agenda.

When you select "Generate report," you will get a dialog box with the following information and options:

1. If you have set an alternate location for minutes, you will see the address at the top of the dialog box.
2. Enter file name - The meeting title and date will appear as suggestions, but you can edit this if you wish.
3. Choose which meeting items to include in the minutes – for example, remove breaks.
4. Choose which attachments to include in the minutes. Attachments are listed under a heading at the bottom of each case.
5. You can preview the minutes before selecting "Save."



Find the finished report

The "Open report" button gives you quick access to the finished report.

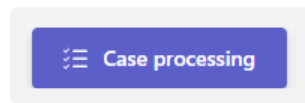
Replace report

You cannot save a report with the same name as an existing one, but you can always create a new report with a new name.

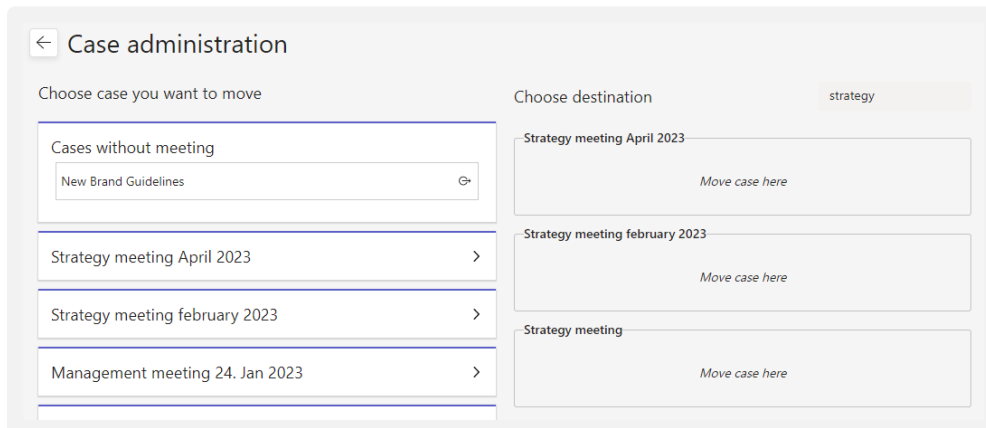
Tip! To replace a report, you must first go to the original report's folder and delete it.

Cases that are not planned in a meeting

Case processing

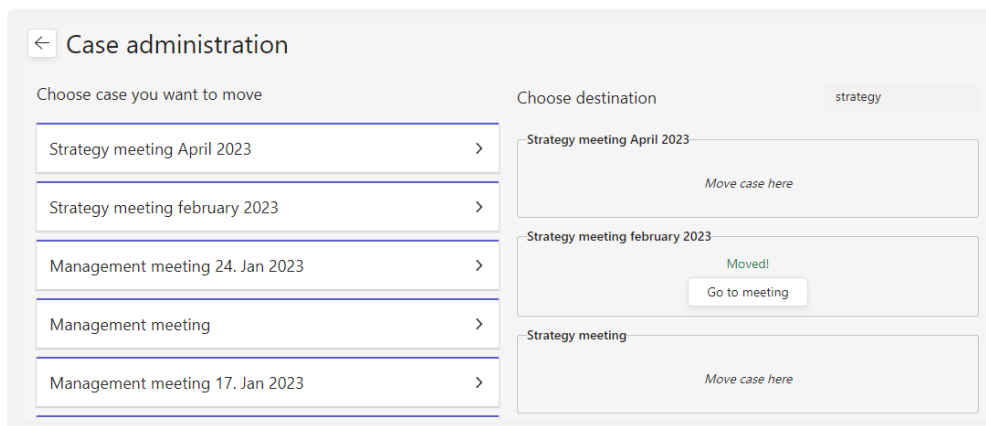


During case processing, you can find all meetings and cases, including those that is not a part of a meeting (Cases without a meeting).



You can move a case to a meeting by dragging it from the left part of the window to the desired meeting in the right part. Use search if you have many meetings.

Then you can select "Go to meeting" to plan the case in the agenda.



Put cases in the right place in the agenda

When you open a meeting with a forwarded case, you will see that it is at the top of the agenda. Grab the move symbol (up/down arrow on the far right) and drag the case into its proper place.

The case gets the start and end time based on the estimated time and order in the agenda. Every time you move a case, the times are automatically recalculated.

Delete meetings

If you want to delete a meeting, you can do so by selecting the trash icon in the top right corner when you are inside the meeting:



If you have sent a meeting request from the meeting, a cancellation will automatically go out to all attendees.

Important! Deleting a meeting will simultaneously delete all cases and any uploaded attachments.

Remember to remove items that you want to keep from the meeting before deleting the meeting. As an extra security check - before deleting the meeting, you must confirm that you are entirely sure.



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