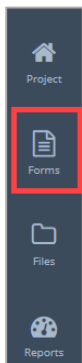


Meetings

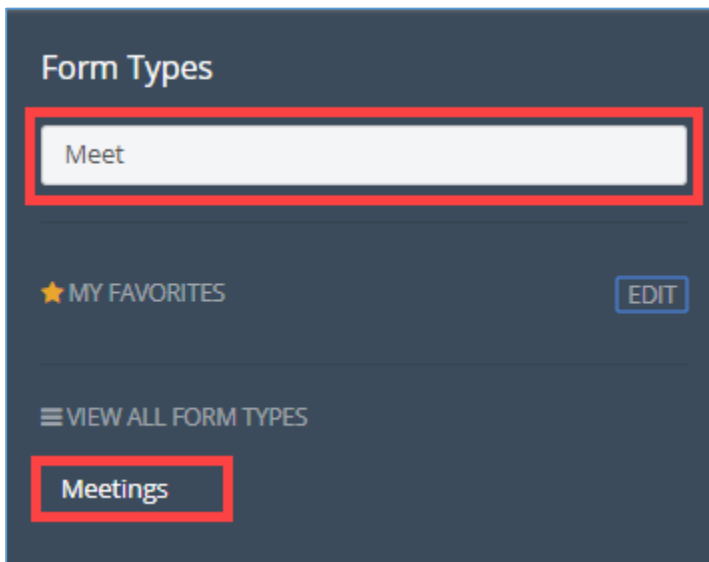
Meeting minutes are the live written record of a meeting. This information includes the list of attendees, related responses and final decisions taken to address any issues.

Creating a NEW Meeting

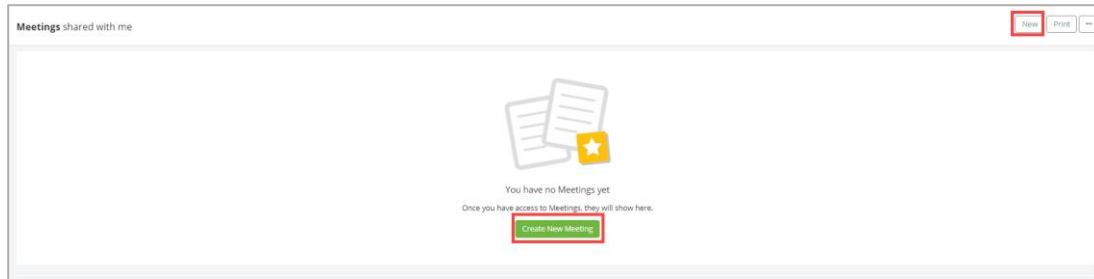
1. Within the project, click the **Forms** icon on the left navigation pane.



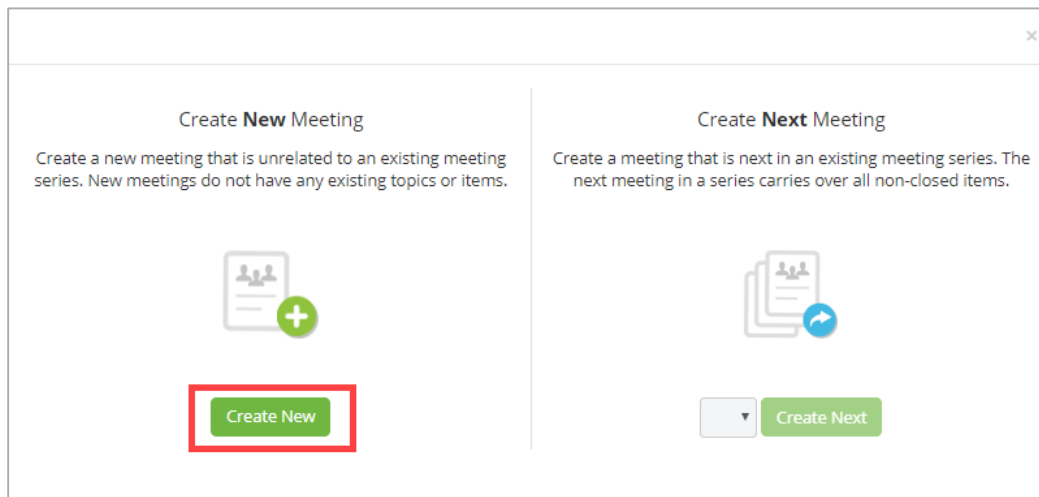
2. Using the Search box, type **meet** to easily locate the **Meeting** form. Click the Meeting form type to open the Meeting log.



3. The Meetings log will open and show any meetings shared with the logged in user. If this is the first meeting of the project, click the **Create New Meeting** button located in the middle of the log



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



5. The meeting form will open. There are 3 required fields which will need to be completed to save the meeting document. The first field is the **Subject**, which is the meeting title.

6. The second required field is the **Meeting Series** field. This field will determine which series to assign future meetings to and will auto populate as new meetings are created within the series.

7. To complete the third required field for this document, click inside the **Start Date and Time** to select the day and time the meeting will begin. Select the date first and then click the time.

8. Click inside the **Scheduled Duration** field and select how long the meeting will last.

Scheduled Duration

9. Enter the **Location** where the meeting will take place.


Location

10. Click inside the **Prepared By** field and select the name of the person who is preparing the minutes.




Prepared By

11. Enter the **Purpose** of the meeting.

Purpose



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

Invitees 				 Create New 
Name	Phone Number	Email Address	Attended	

- a. 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.

Add Invitees

Name
Debra Rakes (ProjectTeam, Inc.)

Phone Number
(703) 961-1007

Email Address
drakes@projectteam.com

Attended
▼

Cancel Add & New Add

- b. 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.

Add Invitees

Name
Debra Rakes (ProjectTeam, Inc.)

Phone Number
(703) 961-1007

Email Address
drakes@projectteam.com

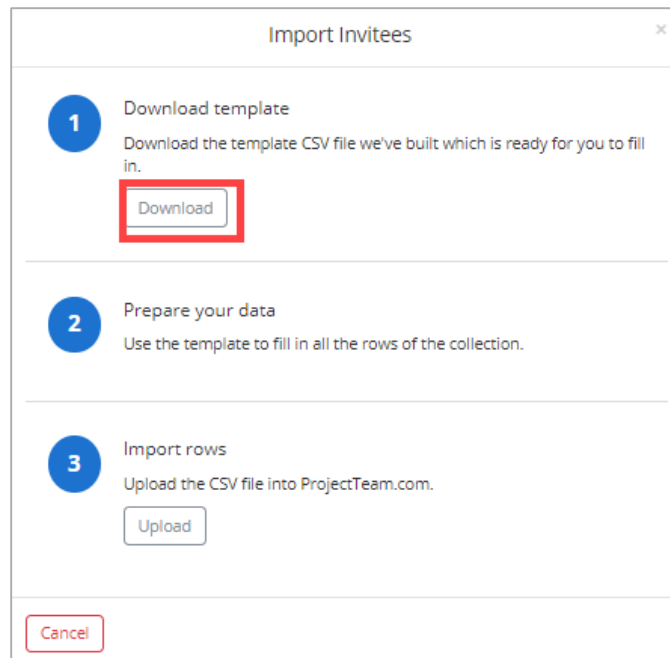
Attended
▼

Cancel Add & New Add

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

	Name	Phone Number	Email Address	Attended
<input type="checkbox"/>	Debra Rakes (ProjectTeam, Inc.)	(703) 961-1007	drakes@projectteam.com	
<input type="checkbox"/>	Susan Mills	(770) 655-5900	smills@projectteam.com	

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



The 'Import Invitees' modal window contains three numbered steps. Step 1, 'Download template', includes a 'Download' button highlighted with a red rectangle. Step 2, 'Prepare your data', has no buttons. Step 3, 'Import rows', has an 'Upload' button. A 'Cancel' button is located at the bottom left of the modal.

Import Invitees

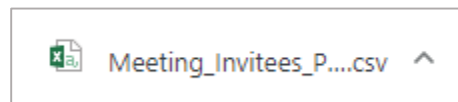
1 Download template
Download the template CSV file we've built which is ready for you to fill in.
Download

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

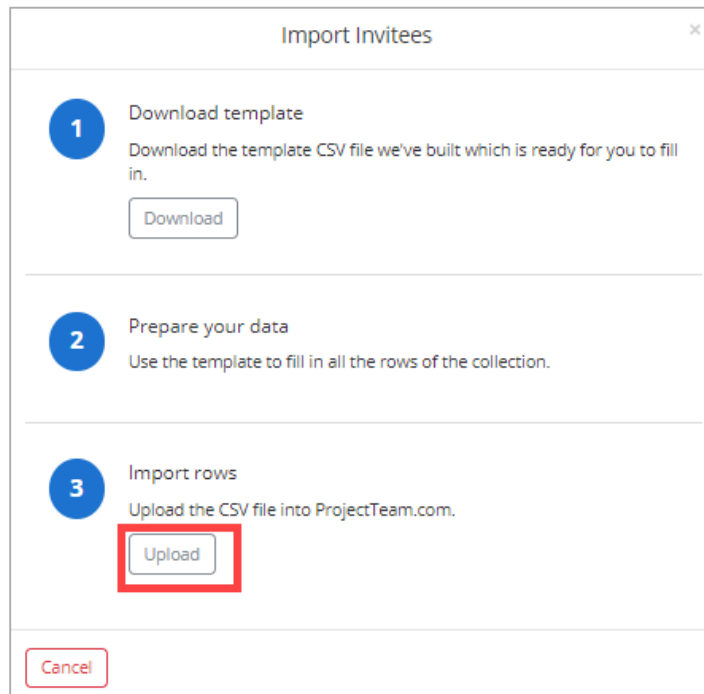
- e. Open the downloaded template.



- f. 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	

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

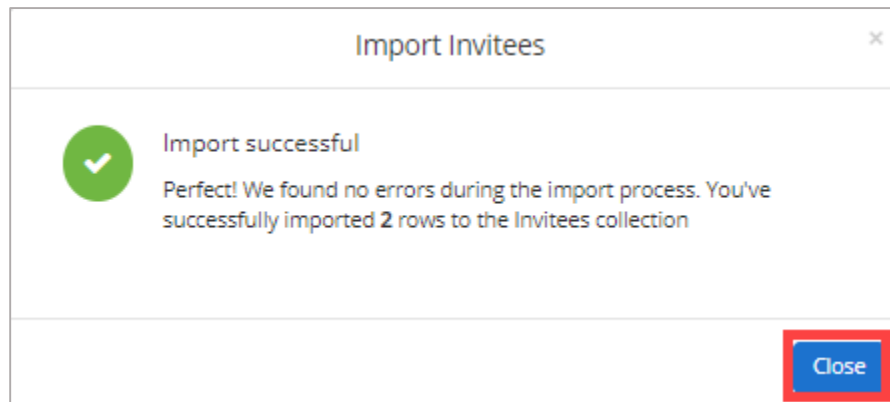


Import Invitees


- 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](#)

- h. 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](#)

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

- i. The imported attendees will appear in the collection.

Invitees 0				
	Name	Phone Number	Email Address	Attended
<input type="checkbox"/>	Debra Ralies (ProjectTeam, Inc.)	(703) 961-1007	dralies@projectteam.com	
<input type="checkbox"/>	Susan Mills	(770) 655-5900	smills@projectteam.com	
<input type="checkbox"/>	John Smith	222-222-2222	john.smith@smithconstruction.com	
<input type="checkbox"/>	Sam Adams	321-123-1234	sam.adams@samadams.com	

- j. 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 ⓘ				⌵ Create New	⌵
	Name	Phone Number	Email Address	Attended	
⌵	Debra Raies (ProjectTeam, Inc.)	(703) 961-1007	draies@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	
⌵	Susan Mills (ProjectTeam, Inc.)		smills@projectteam.com	In Person	

13. The **Discussion** 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.

- a. 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.

Add Topic
×

Topic


Safety

Cancel

Add & New

Add

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

Discussion 

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

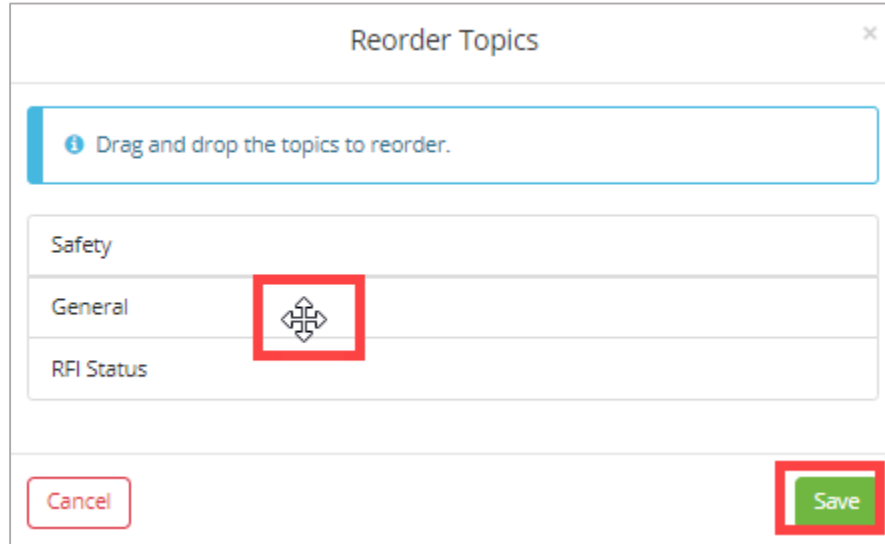
Reorder Meeting Items

New Meeting Items

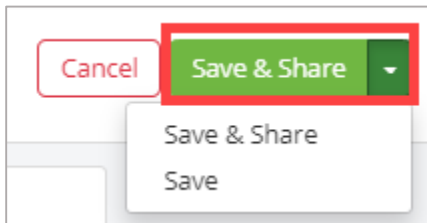
#	Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
---	-----------	-------------------	----------	------------	----------	--------

- c. 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.



14. Click the dropdown arrow beside the **Save & Share** button located in the top right corner. Click **Save & Share** to save the document and share **XXXX Share Group** or click the **Save** button to save without granting access to the drawing package.



Taking Minutes

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

Meetings shared with me

☐ Show Latest Meetings Only

Subject	Meeting #	Start Date/Time	Scheduled Duration	Location	Created On	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	

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	smills@projectteam.com	
John Smith	222-222-2222	john.smith@smithconstruction.com	
Sam Adams	321-123-1234	sam.adams@samadams.com	

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.

Invitees

Name	Phone Number	Email Address	Attended
- Debra Rakes (ProjectTeam, Inc.) Edit Insert above Insert below Remove	(703) 961-1007	drakes@projectteam.com	
	(770) 655-5900	smills@projectteam.com	
	222-222-2222	john.smith@smithconstruction.com	
	321-123-1234	sam.adams@samadams.com	

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

Update Invitees

Name
Debra Rakes (ProjectTeam, Inc.)

Phone Number
(703) 961-1007

Email Address
drakes@projectteam.com

Attended
In Person
By Phone
Online
Did Not Attend

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

Update Invitees

Name
Debra Rakes (ProjectTeam, Inc.)

Phone Number
(703) 961-1007

Email Address
drakes@projectteam.com

Attended
In Person

Cancel < Previous Next > Update & Close

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

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

6. 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 Item

#	Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status

2 - RFI Status Reorder Meeting Items New Meeting Item

#	Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status

3 - Safety Reorder Meeting Items New Meeting Item

#	Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status

- a. 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:

Responsible Party:

Due Date:

Mtg Origin:

Priority:

Status:

Cancel Add & New Add

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

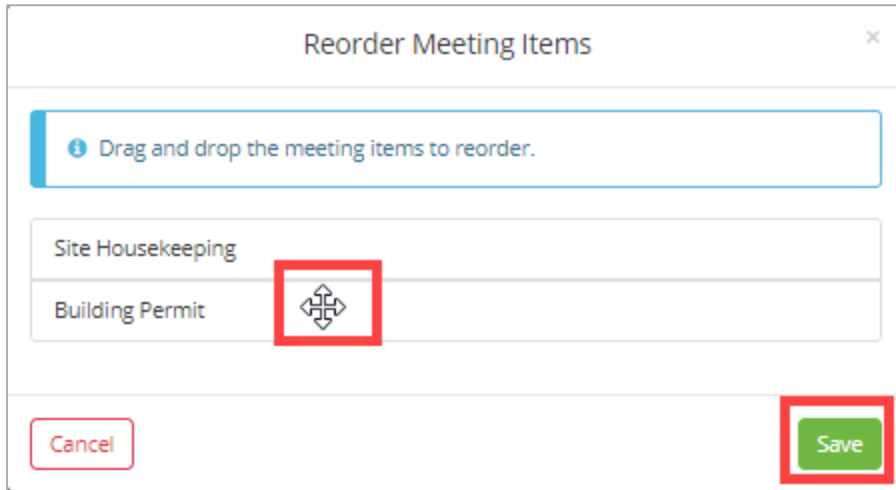
1 - General Reorder Meeting Items New Meeting Item

#	Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
1.1	Site Housekeeping	Susan Mills (ProjectTeam, Inc.)	05/23/2019	1	High	Open
1.2	Building Permit	Debra Raies (ProjectTeam, Inc.)	05/23/2019	1	High	Open

This Meeting: Please make site housekeeping a priority. The site was covered in trash this weekend.

This Meeting: Can you please complete the building permit request application?

- c. 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.



Reorder Meeting Items

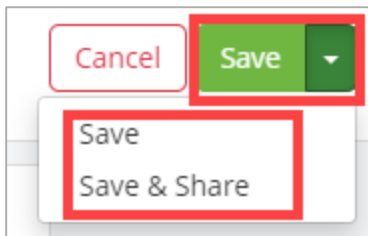
Drag and drop the meeting items to reorder.

Site Housekeeping

Building Permit

Cancel Save

- 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

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

							Share	Print	
<input type="checkbox"/> Show Latest Meetings Only									
<input type="checkbox"/>	Subject	Meeting #	Start Date/Time	Scheduled Duration	Location	Created On	Shared		
Meeting Series: GC Status Meeting									
<input type="checkbox"/>	GC Meeting	1	Tue, May 21, 2019 10:00 AM EDT	1 hour	JobSite	5/23/19 9:26 AM	1	Share	

- 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	smills@projectteam.com	
John Smith	222-222-2222	john.smith@smithconstruction.com	
Sam Adams	321-123-1234	sam.adams@samadams.com	

- 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.

Discussion Reorder Topics New Topic

1 - General Reorder Meeting Items New Meeting Item

#	Item Name	Responsible Party	Due Date	Mtg Origin	Priority	Status
1.1	Building Permit	Debra Rakes (ProjectTeam)	05/23/2019	1	High	Open

This Meeting

Can you please complete the building permit request application?

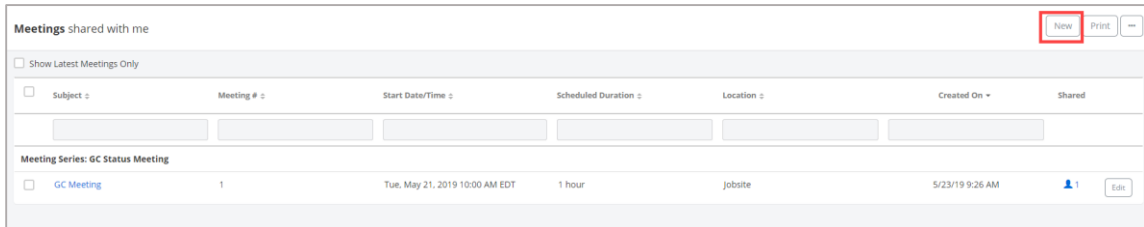
- Click the dropdown arrow next to the Save button. Click **Save & Share** to share the meeting form or click the **Save** button to save the document without sharing.

Cancel Save ▼

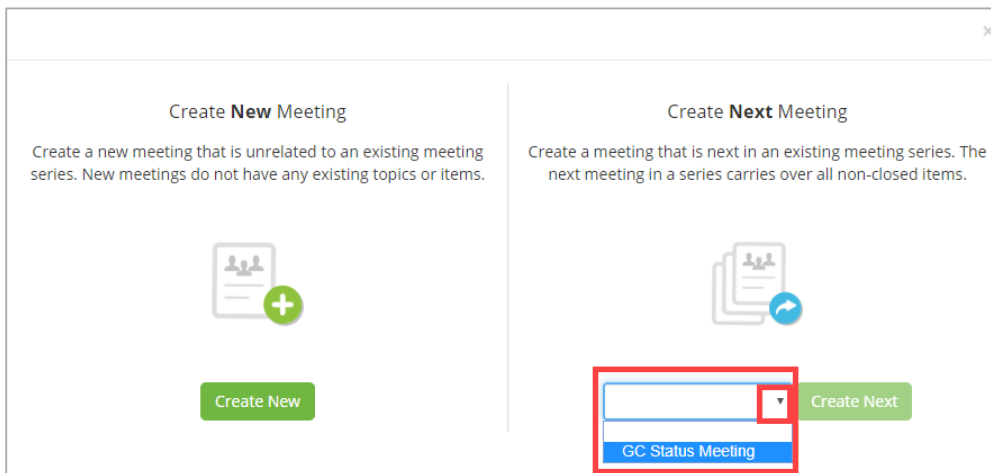
Save
Save & Share

Create the Next Meeting in the Series

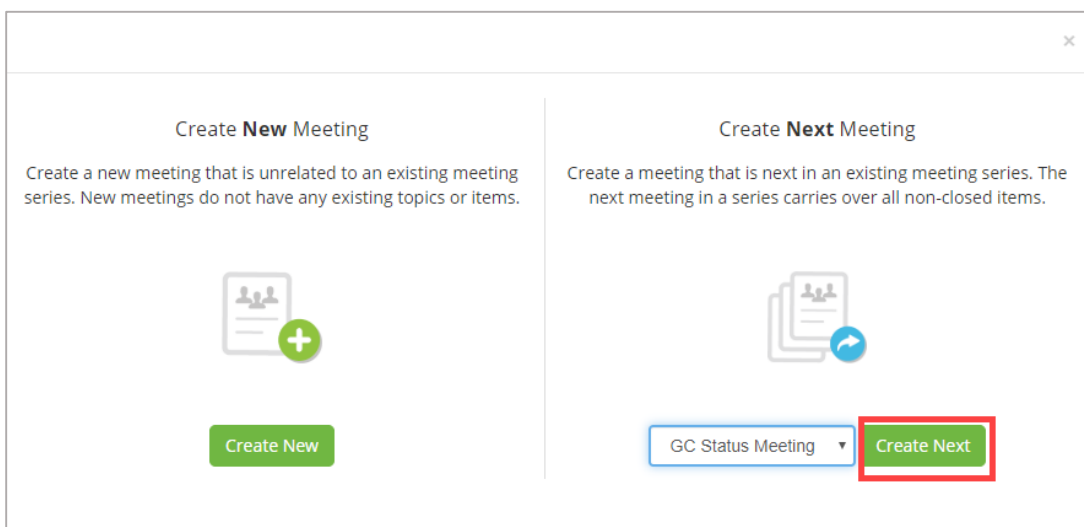
1. Click the **New** button in the top right corner of the Meetings Shared with Me log.



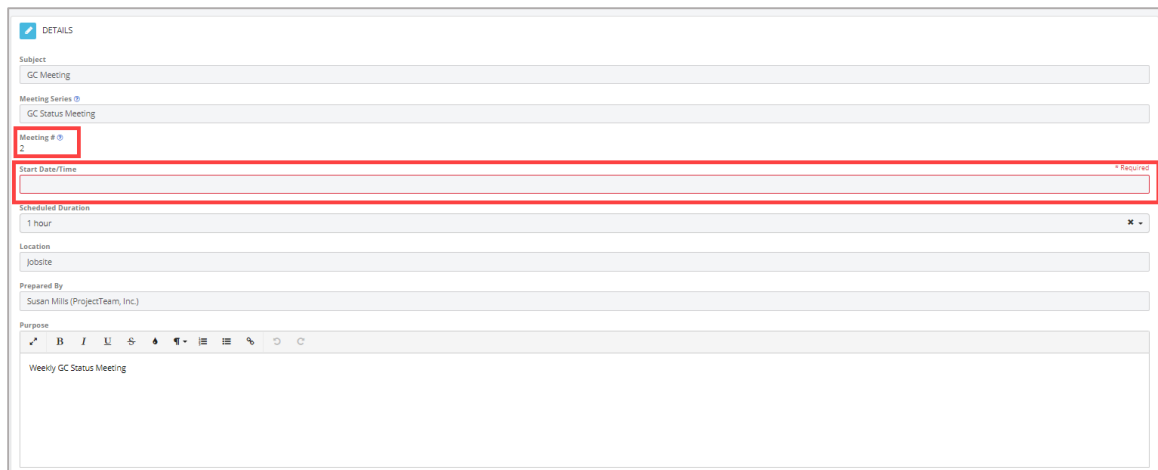
2. In the **Create Next Meeting** section, click the dropdown and select the **meeting set** to apply to the new meeting.



3. Click the **Create Next** button.



- 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.



The screenshot shows a 'DETAILS' window for a meeting. The fields are as follows:

- Subject:** GC Meeting
- Meeting Series:** GC Status Meeting
- Meeting #:** 2 (highlighted with a red box)
- Start Date/Time:** (empty, highlighted with a red box, and marked as 'Required')
- Scheduled Duration:** 1 hour
- Location:** jobsite
- Prepared By:** Sudan Mills (ProjectTeam, Inc.)
- Purpose:** Weekly GC Status Meeting

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