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MeetingSense™ 3.0

User Guide

MeetingSense is an affordable hosted software service that empowers teams to easily capture, distribute and collaboratively manage meeting information and action items online in real time. MeetingSense has proven to eliminate hours of wasted time, save thousands in operational costs and dramatically decrease IT burden while providing standardized meeting structure that drives overall business productivity.

You can get started using MeetingSense to make your meetings more productive by registering for a new account and downloading and installing MeetingSense Capture today. Follow the simple instructions below to begin.

REGISTER FOR MEETINGSENSE

1 Go to http://www.meetingsense.com/go/conferencecall.html.
2 Complete and submit the form.
3 MeetingSense will send you a welcome email. Log in using your temporary password located in the email.
4 Fill in your name, security question and password and click **OK**.
5 In Step 2, download MeetingSense Capture when prompted and then double-click **meetingsense_capture.exe** to install into your Microsoft Outlook® calendar.

INSTALLING MEETINGSENSE CAPTURE

1 Download MeetingSense Capture one of two ways:
- During registration: download MeetingSense Capture in Step 2.
- From the Home page: access your My Account link and click **Download MeetingSense Capture**.

2 Follow the step-by-step directions given by the installation wizard. MeetingSense requires three dependencies to work correctly: Microsoft® .NET Framework 2.0, Microsoft Web Services Enhancements 3.0 and Windows Media Encoder 9. If these items aren't already installed on your computer, MeetingSense will help you install them.
3 Once the installer has finished, open Outlook and then schedule, start or prepare a meeting from the newly installed MeetingSense toolbar or right-click to view the menu options.

ADDITIONAL RESOURCES TO HELP YOU GET STARTED

Along with this MeetingSense user guide, there are a number of online resources to help you quickly become a MeetingSense power user.

For more information:

800.624.6687
www.conferencecall.com

. Please utilize the resources below:

- Visit the online support center from within MeetingSense by clicking **Help** and selecting **Online Support** or access online support directly by visiting http://www.meetingsense.com/support.
- MeetingSense contains a complete help system accessible via the Help menu and selecting **MeetingSense Help (F1)** or simply hit **F1** on your keyboard.

Revolutionary Meeting and Action Item Collaboration

MeetingSense is easy-to-use meeting productivity software that lets teams capture, track and then collaboratively manage meeting information and action items online. Integration with Outlook adds instant structure and best practices to help optimize meeting scheduling and preparation. At meeting time, use MeetingSense Capture to efficiently record all meeting aspects and then instantly distribute those notes and action items via email or publish it all online.

ENHANCE

1 Enhance current meeting workflows via Outlook integration:
- Improve current Outlook meeting scheduling.
- Use the MeetingSense Agenda Wizard for structured meeting invitations.
- Start every meeting utilizing industry-accepted best practices.
- Ensure that meeting invitees come to meetings fully prepared.

CAPTURE

2 Capture all critical meeting information and action items:
- Accurately record every aspect of your meetings.
- Create contextually linked meeting record archives.
- Ensure that action items are always captured and tracked.
- Keep meeting minutes and other information completely organized.

DISTRIBUTE

3 Automatically distribute your meeting information:
- Distribute meeting information immediately following your meetings.
- Publish your meeting information online for instant, anytime access.
- Email neatly stylized and easy-to-read meeting summaries.
- Look like the consummate meeting professional at every meeting.

MANAGE AND COLLABORATE

4 Manage and collaborate on meetings and action items:
- Revolutionary real-time, team meeting information and action item collaboration.
- Shared meeting record repository with online participant access.
- Wiki-like pre-and post-meeting collaboration with change audit trails.
- Collaborative online team file management means reduction in IT resources.

MeetingSense Feature Descriptions

CHANGE MEETINGSENSE PREFERENCES TO SUIT YOUR STYLE

Easily change preferences to customize MeetingSense to your needs. Change general settings, default notes font and audio recording options.

1. Choose preferences from the File menu by clicking **Tools**, then **Preferences**.
2. Make any changes that better suit your personal use of MeetingSense.
3. Click **Ok** to have those new changes applied to MeetingSense Capture.

SEND MEETING INVITATIONS WITH AGENDA AND CONFERENCING INFORMATION

Automatically place any information that you have included in the MeetingSense Agenda tab of your Outlook meeting request into the body of that meeting's invitation.

For new meeting requests:

1. Click **Schedule Meeting** on the MeetingSense toolbar in Outlook.
2. Enter your agenda and conferencing information and click **OK**.
3. Note the agenda and conferencing information automatically copied into the body of your meeting request.
4. Enter the rest of your meeting information in the meeting request and click **Send** to automatically distribute all information.

For existing meetings on your calendar:

1. Double-click the meeting on your Outlook calendar to open the meeting request.
2. Click **Agenda** at the top of the meeting request. (For Outlook 2007, go to the Add-Ins tab, then click **Agenda**.)
3. Enter your agenda and conferencing information and click **OK**.
4. Send the update to automatically distribute all information.

PREPARE MEETINGSENSE MEETINGS AT ANY TIME

Open, prepare and then save your meeting information days or even months in advance of a scheduled meeting. Ensure that your meeting record will open just as you want it at the time of your meeting.

1. Prepare any upcoming meeting from either the MeetingSense Today screen or the upcoming meeting listing area.
2. Prepared meetings will be shown in the dashboard with a green icon in the Prepared Meetings list on the Home page.

CONDUCT SCHEDULED MEETING IN MEETINGSENSE CAPTURE

Launch your Outlook meeting in MeetingSense Capture one of three ways:

From the invitation:

1. When the Outlook meeting reminder appears, double-click it to open it, then click **Start Meeting**. (For Outlook 2007, go to the Add-ins tab then click **Start Meeting**.)
2. The meeting console will be loaded with information pulled from your original Outlook meeting invitation, including participants, any meeting files and the agenda.

Context menu:

1. Right-click any meeting on your Outlook calendar.
2. Select **Start** or **Prepare** from the context menu.

Outlook toolbar:

1. Select any meeting on your Outlook calendar.
2. Click **Start** or **Prepare** in the Outlook toolbar above your calendar.

OPEN AND START CAPTURING A SPONTANEOUS QUICKMEETING

Start a spontaneous QuickMeeting in MeetingSense Capture any time simply by clicking one button.

1 From Microsoft Outlook, click **QuickMeeting** in your Outlook toolbar.
2 Enter a meeting subject and location, then click **OK** to open the meeting in MeetingSense Capture.
3 Use MeetingSense like normal to access the meeting record through the dashboard.

EDIT PREVIOUS MEETINGS AND THEN SEND A NEW UPDATE OR SAVE AND CLOSE

Easily edit previously prepared or conducted MeetingSense meetings using your online dashboard. Just find that meeting in the dashboard and click **Edit**. The meeting record will open in MeetingSense Capture exactly as it was left when the meeting ended. Then, change anything in the old meeting console and resend the summary or save and close the console.

1 Select the meeting to edit in the meetings list on the Meetings page of your dashboard.
2 Click **Edit**.
3 MeetingSense Capture will open and load the selected meeting.
4 Make any desired changes, then send a new update or save and close. (Note: Only meeting organizers will have the option to edit a meeting.)

CUSTOMIZE YOUR MEETINGSENSE CAPTURE INTERFACE TO SUIT ANY MEETING

Completely customize the MeetingSense console to fit any meeting. There are six default layout templates with MeetingSense, but you can drag and drop Pods around the interface, close or open individual Pods or resize Pods to save a new layout.

1 Choose a default layout to start with and then open or close Pods.
2 Move Pods by clicking, holding and dragging them around the interface.
3 Select **Layouts**, then **Save Layout** from the File menu, then name your new layout.

GROUP MEETINGS BY PROJECT

Group any number of meetings or action items under a specific project listing. Project grouping allows multiple meetings to be linked together for easy grouping and access in the online dashboard.

1 In an open meeting, use the Meeting Details button to access this functionality.
2 Using the project area, assign this meeting to a current project from the drop-down or click **New** to create a new project for this meeting series.

MEETING-TO-MEETING ACTION ITEM MANAGEMENT

Easily manage open and/or overdue action items across a recurring Outlook meeting series or within a MeetingSense project grouping. Meeting-to-meeting action item management ensures all action items are completed.

1 Assign an open meeting to a project series or Outlook recurring meeting.
2 Open and overdue action items from past meetings will automatically appear in the current meeting's Action Item Pod.
3 Complete any closed action items. These results will be shown in the output email.

IN-MEETING ATTENDANCE (ROLL CALL)

Take attendance or roll call for full accountability. Roll taken during the meeting will be noted and sent with any output.

1 In an open meeting, double-click or select and click **Attended/Not Attended** in the Invited Participants Pod toolbar.
2 To change status back to the original designation, repeat this step.

ACCESS PERSISTENT MEETING INFORMATION FOR RECURRING MEETINGS

Display a list of the previously held meetings in MeetingSense Capture if they are part of a recurring meeting series in Outlook. Clicking an old meeting link will open that meeting in a separate tab with all of the persistent meeting data.

1. Designate the meeting as a recurring meeting when creating it in Outlook.
2. From the second meeting on, the Past Meetings Pod will be displayed.
3. Click a previous meeting link and that meeting's console will open in a tab on the right with all of the information exactly as you left it.

ACCESS PUBLISHED MEETINGS AND ACTION ITEM RECORDS FOR ONLINE COLLABORATION ANYWHERE, ANYTIME

The MeetingSense online dashboard gives you instant access to all prepared and captured meeting and action item information, including files and team collaboration, through your browser.

1. Log into you online dashboard (https://ms1.meetingsense.com).
2. Find the desired meeting on the Home page or via the Meetings tab.
3. Find the desired action item on the Home page or via the Action Items tab.
4. Find files in the Files tab within each individual meeting or action item record.

USE ALERTS TO STAY UPDATED ON EVERYTHING HAPPENING IN YOUR MEETINGSENSE WORLD

The MeetingSense online dashboard's Alerts Pod is your communication center for all of the important actions happening as others communicate with you through MeetingSense.

1. Log into you online dashboard (https://ms1.meetingsense.com).
2. On the Home page, look at your alerts. (Note: Newly arrived alerts have a red X and are bold; already selected and read alerts will not have bold text).
3. To access the item associated with each alert, click on the title of the item. You can also choose to read all or dismiss all alerts.

SEARCH FOR ANY PIECE OF MEETING OR ACTION ITEM INFORMATION

Use the search functionality to find your meetings and action items.

1. Enter your search term in the Search box.
2. Click **Go**.
3. Click the desired search result to access the desired meeting or action item.

USE POWERFUL ACTION ITEM FILTERING AND SORTING

Use the powerful, intuitive action item sort and filter capability to create a custom action items view for any need.

1. Log into you online dashboard (https://ms1.meetingsense.com).
2. On the Home page (or in the Action Items tab) access the action item section with the filter and sort function at the top.
3. The filter defaults to show you your open action items.
4. To change the filter, click **Filter by** and choose one of the default filters, all action items or click **Advanced Filter** to build your own filter. To build your own filter, simply select the appropriate string of attributes. Each new attribute will be listed in your new filter.
5. Click on any underlined attribute to choose another value.
6. To sort, click the blue arrow to change the order of the listed action items or click the underlines attribute itself to change the value.

EASILY IDENTIFY MEETINGS BY DASHBOARD ICON

See the specific type or state of a listed meeting by its dashboard icon. Blue icons designate QuickMeetings, red icons are conducted MeetingSense meetings and green icons are prepared meetings (located in the Prepared Meetings list on the Home page).

1. Log into MeetingSense online dashboard.
2. Browse the Conducted and Prepared meetings list to see the type or state of all meetings.

QUICKLY FIND THE MEETING THAT YOU ARE LOOKING FOR

The Meetings tab provides you with multiple ways to instantly find any meeting in your repository. You can find meetings with the interactive calendar, by day, week, month or all or filter meetings by project.

1. On your Meetings tab, to find a meeting with the interactive calendar:
   - Click on a day to display that day's meetings in the list below.
   - Use the arrows at the top corner of the calendar to navigate months.
   - Use the tabs above the list to designate day, week, month or all meetings.
2. To filter meetings by project, select a project in the drop-down menu to show meetings for only that project.

ASSIGN AN ACTION ITEM TO ANYONE FROM THE ONLINE DASHBOARD

The Add Action Item button on the Meetings page gives you the ability to assign an action item to anyone, whether they are part of your license pack or not.

1. Go the Action Items page and click **Add Action Item**.
2. Fill in the details of the action item and click **Save**. (Note: The owner(s) field requires the full email address.)
3. Users who are part of your license pack will receive an email and an alert. By clicking on the links provided in the email, they will have full access to the Action Item in their dashboard.
4. Users who are not a part of your license pack will receive the Action Item, an email and an alert. They will also become FreeAccess Users, which gives them the ability to log into their Home page and view and complete the status of their action items.

REQUEST ACTION ITEM UPDATES FROM THOSE YOU'VE ASSIGNED

With one click, request updates from those who have not completed their assigned action items.

1. On the Home page, find the action item in the Action Items pod using the desired filter.
2. Click **Request Update**.
3. Add a comment and send the request to the Action Item owner.

PRINT AND EMAIL MEETING OR ACTION ITEM DETAILS IN ONE CLICK

Share meeting or action item details with those who weren't part of the original meeting using the MeetingSense online dashboard.

1. In the dashboard, choose the meeting or action item you would like to share.
2. Choose to either print the details or send them in an email. (Note: Only meeting organizers will have access to the Send Summary button.)