Using MeetingSquared as an Administrator

Use the MeetingSquared *web interface* to set up and manage your meeting. MeetingSquared is part of SharePoint within Office 365 so you use a web browser to log in using your existing Office 365 username and password. When you log in you will see your *MeetingSquared SharePoint site* containing a large blue banner- click the banner to open the *MeetingSquared web interface*.

Getting Started

− Open a web browser and log in to your MeetingSquared SharePoint site using your usual University username (in the format *userID@abdn.ac.uk*) and password.

> **Important:** If you are setting up a meeting for the first time or are adding users to an existing meeting group, it is advisable to check that access permissions are set up correctly in SharePoint (see **Appendix** for instructions on how to do this). You may also need to check and amend the SharePoint site permissions when people leave or join committees.

− Click the large blue Meeting Squared banner to go to the MeetingSquared web interface.

> Add the site to your Favourites list in the browser to make it easier to find. Alternatively, you can follow the site in SharePoint (see page 6).

Change the default email notification text

When you publish a meeting, all attendees will receive a notification email. On a new site the email uses the MeetingSquared default text but we recommend that you change this. We have created a template to help you do so, as you must change the html code via the MeetingSquared settings. Click the link below to find the code and instructions on how to make the necessary changes.

Email html instructions

Note: You will only have to do this once. When you have changed the code, the text will apply to all emails you send when publishing.

Create a Meeting Group

When you create a meeting, you associate it with a particular *meeting group* (equivalent to a committee). As an Administrator, you can create and manage these groups within the MeetingSquared web interface. By default, members of a meeting group are automatically added to the Attendee list for the meeting, but you can edit this list if required.

− Click **+ Meeting Group** at the bottom left of the screen.

− Type a name and description for the new group and click **OK**.

Add Group Members

– Click (or hover over) the **group name** to display the People/Edit/Delete buttons.

– Click **People** to add members to the group.

  – If you can see the person's name in the list at the left, click the **Add** button opposite their name to add them to the group.

  – If you can't see their name, click into the Search box at the top of the for people in the format [Last Name, First Name].

– Click **Add** to add them to your group- by default users will have *Member* permissions, but you can allocate different levels of permissions, if required. Hover over the icons at the bottom of the screen for more details of each level.

– Click **OK** when you have finished adding group members**.**

– **Warning**: only people who have been given access to the SharePoint site will be able to access the meeting information.

Create a Meeting

– Click **+ Meeting** at the top of the Meeting List Pane.

  – Choose the **Meeting group** from the drop-down list.

  – Type a **name** for the meeting.

  – Set the **Start date** by clicking the calendar icon and the **Start time** by clicking the clock icon.

  – Set the **End date** by clicking the calendar icon and **End time** by clicking the clock icon.

  – Type a **description** for the meeting.

  – Click **Next** to move to the Location tab, if desired.

  – Enter the location of the meeting.

  It's best to start with the postcode, so the map finds the general location. Additional information, e.g. room, building can be added manually, but remember the map may not be pinpoint accurate.

  – If you have conferencing details, click **Next** to move to the Conference tab and enter the details.

– Click **Save**.

Build the Agenda

– Click the title of the meeting to select it.

– Click the **+ Agenda** button at the right of the screen.

– Type the first agenda item and press [**Enter**].

– Continue typing agenda items- they are numbered automatically.

  Note: if you want to create a sub-item, select an existing agenda item, then click the Agenda button from the same row. A new row appears beneath it with automatic numbering applied.

| 1	Install the app
2	Access the site
3	Working with papers
3.1	Annotate papers
3.2	Bookmark papers
4	AOB

> If you regularly use the same agenda structure or attendee list, you can copy them from a previous meeting allocated to the same meeting group. To do so, click the **Import** button at the top of the Agenda window. Click the agenda (or attendee list) you want to copy and click **OK**.

Edit the Agenda

- Click an agenda item and click **Edit**

- The Edit agenda window opens-change/add details as required.

  - Presenter names and further notes can be added here.

- Click **Save and Close** when finished.

Attach Meeting Papers to the Agenda

- Click an agenda item to select it.

- Click the **drop-down arrow** on the Agenda button and click **Document.**

- Browse to the document on your computer and click **Open** to add it to the agenda. The document appears underneath the agenda item.
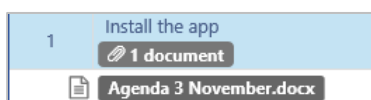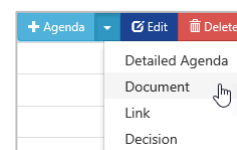
- Continue adding documents as required.
  Note: clicking a document in the agenda displays buttons to let you preview, download, edit the name or delete the document. Previewing a document will open a pane to the right where you can view the contents.

> You can also drag and drop documents onto an agenda item or into the area below the agenda (if the document is not directly associated with a particular agenda item). Open File Explorer or Computer and drag the document(s) onto the agenda item or into the area at the bottom of the agenda.

Redact agenda items

Sometimes you might want to restrict some agenda items from individual attendees. You can do this by redacting the agenda.

  - Click the **Redact agenda** button at the top of the agenda and tick the boxes for the items you want to redact and click **Next**. Click **Remove** against the name of the attendee(s) you want to prevent from seeing the redacted items, then click **OK**. The items will show a Redacted icon in the agenda.

Note: if you create a meeting pack, all items (including any redacted items) will be included. To remove these items, you will have to edit the PDF (using Adobe Acrobat Pro DC[1]).

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[1] Don't have Acrobat Pro? You can request the software for University managed devices via the IT Service Desk at servicedesk@abdn.ac.uk

Publish the Meeting

Once you have finalised the agenda, you should publish the meeting. This sends an email notification to all attendees containing details of the meeting-including a link for those who wish to use the web interface- and ensures that everyone sees it in their list of meetings.
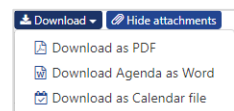
> ⚠️ To ensure that you (as the Administrator) also receive a copy of the meeting notification email, add yourself to the Attendee list- click **Show More** at the right of the Agenda screen to open the Attendees pane then click **+Attendee**. Type the first few letters of your last name and click it from the list when it appears. Click **OK**.

− Double-check the Attendee List by clicking **Show more** at the top right of the screen.   `Show more ➜`

− Check the list and edit it as required:

    o   To add an attendee: Click **+ Attendee** and search for them by name

    o   To delete an attendee: Hover the mouse over the name until the Delete button appears- click to delete and confirm the deletion.

− Click **Close** to close the panel.   `✖ Close`

− Click **Publish** at the top of the meeting window.   `✈ Publish ▾`

− Type a comment and click **OK**.

− Attendees will receive an email from the system with details of the meeting.

Create a Meeting Pack

A Meeting Pack is a PDF document containing the meeting details, attendee list, agenda and accompanying papers, which you can save on your computer as a historical record of the meeting, if requiredss.

− Click the **drop-down arrow** on the **Download** button and click **Download as PDF**.

− A banner at the bottom of the screen will prompt you to save or open the PDF once it has been generated.

    `⬇ Download ▾  🔗 Hide attachments`
    `📄 Download as PDF`
    `📄 Download Agenda as Word`
    `📅 Download as Calendar file`

Hints and Tips

- Need to add/re-order/delete agenda items after you have published the meeting?

  – Edit the agenda and add or delete the items as described earlier. When attendees next launch the meeting they will automatically see the new content. If you need to do this during a meeting then attendees will see the changes after they refresh the meeting.

- Need to insert a new agenda item into the existing agenda?

  – Click **+ Agenda** and type the title of the agenda item and click OK.

  – Hover the mouse over the item number and click and drag it into position

- Set the order of the documents attached to an agenda item (if you have multiple documents attached to the same item):

  – Click the name of the document you want to appear first and click **Edit**. Type '1' or 'A' at the start of the document name and click **OK**. Repeat this step with subsequent documents, using '2' or 'B' etc. MeetingSquared will arrange the documents in ascending order.

- Make it easy to navigate to your MeetingSquared SharePoint site by adding it to your browser favourites list, or by following the site within SharePoint:

  o To add the site to your Favourites- go to your site and click the Star at the top right of the screen to access the Favourites menu.

  o To follow the site in SharePoint, log in to the site then click the **Follow** button at the top right of the screen. Now you can find your way to the site whenever you are logged into Office 365 by clicking the Office 365 app launcher grid and choosing **SharePoint**. You will see a list of the sites you are following-click to open your MeetingSquared site.

Appendix

Before you can add someone to a meeting, you must to add them to a SharePoint group to grant them access to the meeting site. All SharePoint meeting sites contain a **Members** group to which you should add attendees.
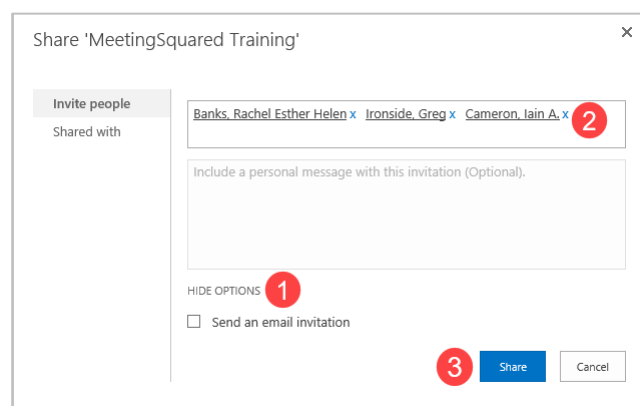
1
Meeting Administrator
- Adds attendees to Sharepoint site as Members

→

2
Meeting Administrator
- Adds attendees to MeetingSquared meeting group

→

3
Meeting Attendee
- Accesses meeting via mobile device or laptop

Check that user is a member of your site

- Click the **cog** icon at the top right of the SharePoint window and Click **Site settings**.

- In the *Users and Permissions* section, click **People and groups.**

Change the look
Site settings
Getting started

Users and Permissions
People and groups
Site permissions
Site app permissions

- The groups are listed at the left of the screen. Click the **[Your site Name] Members** group to select it. The list of current members is displayed.
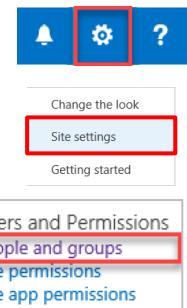
Add users to your site

New ▾   Actions ▾   Settings ▾

- Click **New** to display the Share window and add users to the site.

1. Click **SHOW OPTIONS** to display the *Send an email invitation* checkbox. **Click the checkbox** so it is **not ticked**.

2. In the box at the top, type the **last name** (or userID) of the person you want to add- SharePoint will display a list of matching users. Click the person's name from the list.

3. Continue to add users as required and click **Share** to add them to the Members group for your site.

Share 'MeetingSquared Training'   ×

Invite people
Shared with

Banks, Rachel Esther Helen x Ironside, Greg x Cameron, Iain A. x **2**

Include a personal message with this invitation (Optional).

HIDE OPTIONS **1**

☐ Send an email invitation

3 Share   Cancel

- Click **Home** to return to the front page of your meeting site.

- Click the large blue Meeting Squared banner to go to the MeetingSquared meeting site.

UNIVERSITY OF ABERDEEN   Home   ✎ EDIT LINKS

- • To follow the site so you can find it easily, click **Follow** at the top right of the SharePoint screen.

☆ FOLLOW

- To find the site, log into Office 365 and click the **app launcher** at the top left of the screen and click **SharePoint**. The sites you follow are listed on the left. Click your MeetingSquared site.