



ENABLE 365 - Agenda

- Save time with effective meetings

AGENDA

Setup

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 with 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 setup and get started with Agenda in your team.

Good luck!



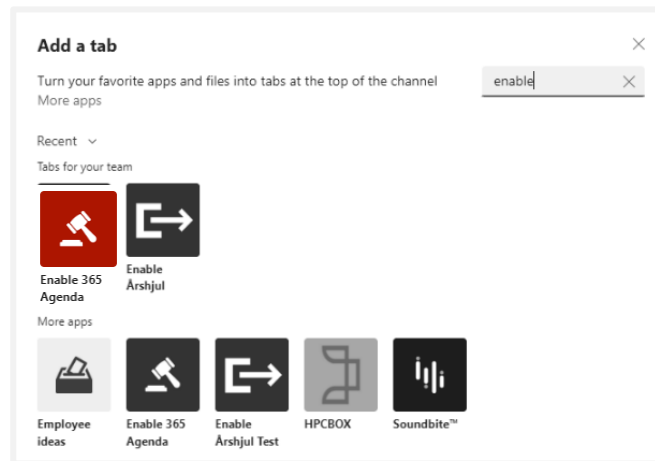
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From "Settings," you can add regular participants, set a fixed location for minutes/agenda, and adjust settings related to tasks, etc. These settings can be changed at any time and will primarily affect new meetings. The settings are described in the sections below.	4
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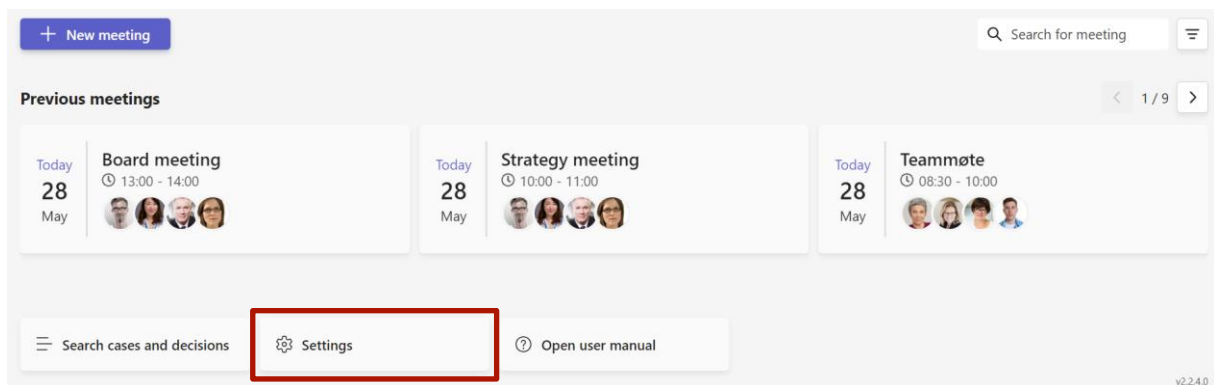
Getting started with Agenda in your Team

Add Agenda as a Tab

Go to the team's channel where you want to add Agenda, click the plus symbol to add a tab, search for "Agenda" and select "Enable 365 Agenda" in the list of available apps:



Settings for Agenda in your Team



From "Settings," you can add regular participants, set a fixed location for minutes/agenda, and adjust settings related to tasks, etc. These settings can be changed at any time and will primarily affect new meetings. The settings are described in the sections below.

Group Calendar

By selecting this, you will have the option to send a meeting invite to the participants when the meeting is being created.

Enable group calendar integration

Requires your IT Administrator to provide consent to Agenda. Visit <https://enable365.io/support/itadmin> for more information and an email template you can send to IT.



Note! If the selection is not active, you must send a request to your administrator to approve the app for this.

Planner Tasks

To create Planner tasks directly during the meeting, you first need to specify which Plan the tasks should be added to. The Plan must be created in advance. You can either select an existing Plan from the dropdown list or create a new plan by clicking the plus sign. Then, enter the desired name for the new plan.

Enable Microsoft Planner integration

Existing plan:

Select Existing Microsoft Planner



Create new plan



Regular Meeting Participants




Add the people who will automatically be participants in all new meetings.



Note! This option can be overridden for meeting templates and for individual meetings. This means that you can have diverse groups of participants in different types of meetings, even in the same Team.



To add a person, click on the icon to add people, then enter the name in the search field. Select the correct person from the list of suggestions that appears.



Add default participants for meetings in this team

☐ Team's member group

  Hadja Hansen 

 Merethe Vibe 

 Kent Roger Nokkas 

 Eirik Tønne 

Participants can be removed by clicking the cross to the right of their name.

To add the entire team's member group as standard meeting participants, activate this option here. This requires permission to read the group's members and must be approved the first time the option is activated.

Add default participants for meetings in this team

☒ Team's member group

Case Categories

Add the categories you want to use for your meetings. Just enter a category name and click the plus sign to add them:

Agenda items categories

Decisions ×

Discussions ×

Possibilities ×

Briefing ×

Planning ×

Add

+

Tip! Create a category called "Break," and you will get that planned too.

Meeting Categories

Add the categories you want to use for your meetings. Just enter a category name and click the plus sign to add them. Categories can be removed by clicking the cross to the right of the category.

Meeting categories

Status ×

Strategy ×

Board ×

Customer ×

Development ×

Add

+


Publish the agenda/schedule as a PDF File

In Agenda it is possible to publish the agenda as a file in PDF format. By default, the file is saved in the "Agendas" library in the team's associated SharePoint site. If you want the agenda to be published elsewhere on the intranet, you can change this by clicking "Choose Folder."

To select a different location, enter the name of the site you want to publish to, then select the library and folder you want to use.

Select save location for agenda

Overwrite the default save location for agendas

 /sites/TeamHR/Agendas

[Select folder](#) [Remove](#)

NOTE! Make sure that the ones who are going to publish the agenda/schedule also have write access to the library on the intranet.


Publish the report/minutes as a PDF File

In Agenda it is possible to publish the report as a file in PDF format. By default, the file is saved in the "AgendaReports" library in the team's associated SharePoint site. If you want the minutes to be published elsewhere on the intranet, you can change this by clicking "Choose Folder."

To select a different location, enter the name of the site you want to publish to, then choose the library you want to use.

Select save location for minutes

Overwrite the default save location for minutes

 Default

[Select folder](#)

NOTE! Make sure that that the ones who are going to publish the report/minutes also have write access to the library on the intranet.

Specify Storage Location for Each Save

To specifically choose the storage location for documents each time an agenda or minutes is generated, activate this option here. This provides users with the flexibility to select the location for each save of both the agenda and minutes.

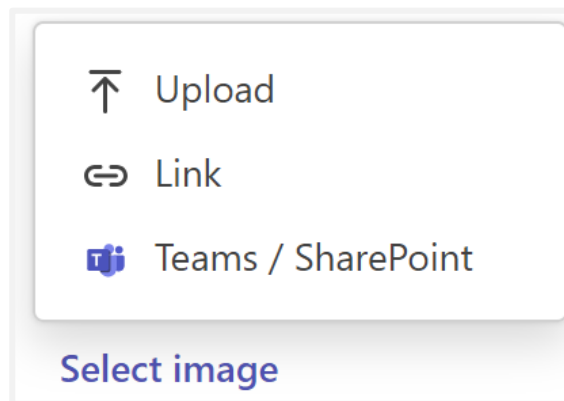
Specify a save location every time a document is saved



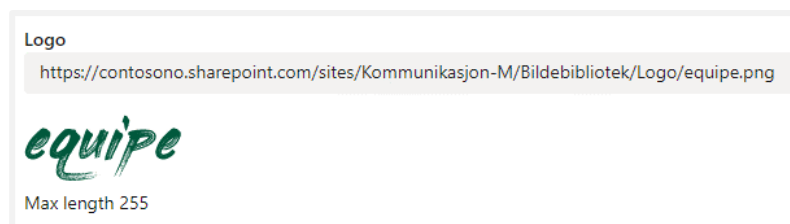
Specify a save location

Add a Logo for Agenda and Minutes

To add a standard logo that will be placed in the top left corner of agendas and minutes, you can do so here. There are three options for adding the logo:



1. **Upload:** Upload a logo from your local device; the image will be stored in your list.
2. **Link:** If the desired image is located either in Teams or on a SharePoint site, paste the link to the logo you wish to use, following the exact format as the example below (a standard hyperlink will not work).

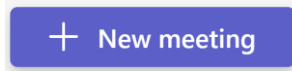


3. **Teams/SharePoint:** Allows you to navigate through the file structure on your SharePoint site and select the logo.

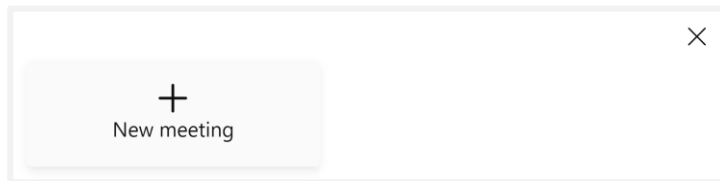
Create Meeting Templates

Creating templates for regular meetings can save a lot of time. Issues, participants, and responsible parties are stored in the template, making it easy to set up new meetings in a meeting series.

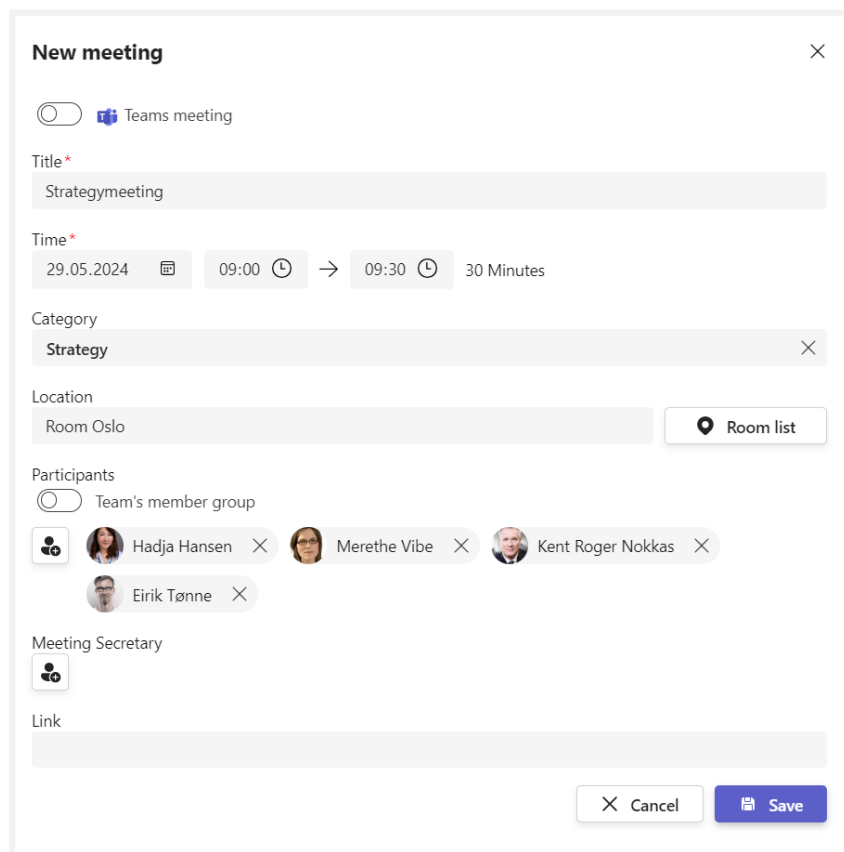
Start by selecting "New Meeting."



Then, choose "New Meeting" in the dialog that appears.



Fill in the meeting title, start and end time, optional location, and participants.



New meeting [X]

☐ Teams meeting

Title*
Strategymeeting

Time*
29.05.2024 [calendar icon] 09:00 [clock icon] → 09:30 [clock icon] 30 Minutes

Category
Strategy [X]

Location
Room Oslo [Room list button]

Participants
☐ Team's member group

[Group icon] [Profile icon] Hadja Hansen [X] [Profile icon] Merethe Vibe [X] [Profile icon] Kent Roger Nokkas [X]
[Profile icon] Eirik Tønne [X]

Meeting Secretary
[Group icon]

Link
[Empty text field]

[X] Cancel [Save]

The current date is filled in automatically, but it does not affect the meeting template. New meetings created based on the template will be suggested on the current date regardless.

Click "Save" to save the meeting.

Today
29
May 24

Strategy
Strategymeeting

🕒 09:00 - 10:00 📍 Room Oslo 👤 4 Participants

☰ Agenda 👤 Participants 📎 Attachments

There are no agenda items attached to this meeting. Click the plus button below to create one.

⊕

- Edit
- Generate agenda
- Generate minutes
- Save as meeting template
- Delete

Save the meeting as a template by choosing “Save as meeting template”

←

Today
29
May 24

Strategy
Strategymeeting

🕒 09:00 - 10:00 📍 Room Oslo 👤 4 Participants

☰ Agenda 👤 Participants 📎 Attachments

There are no agenda items attached to this meeting. Click the plus button below to create one.

⊕

Success
Template created

The template has been created and can be found in the list within the "New Meeting" dialog under Templates.

⊕
New meeting

Templates
Choose a meeting template you want to use. Agenda items saved in the template will also be created.

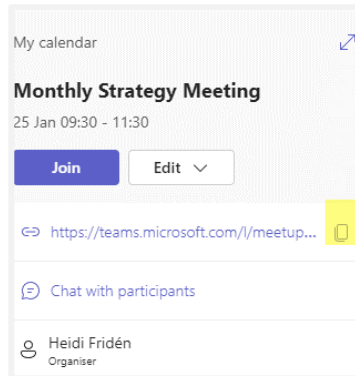
Teamsmeeting
🕒 08:30 - 10:00 ✎

Board meeting
🕒 13:00 - 14:00 ✎

Strategymeeting
🕒 09:00 - 10:00 ✎

Meeting link to a meeting series

When creating a template for a meeting series you already have planned, you may want to add a link to the meeting series in the template. Find the meeting in the calendar in Teams and copy the link, then paste the link in the "Link" field.



New meeting ×

☐ Teams meeting

Title *
Strategymeeting

Time *
29.05.2024 09:00 → 09:30 30 Minutes

Category
Strategy

Location
Room Oslo Room list

Participants
☐ Team's member group
Hadja Hansen × Merethe Vibe × Kent Roger Nokkas ×
Eirik Tønne ×

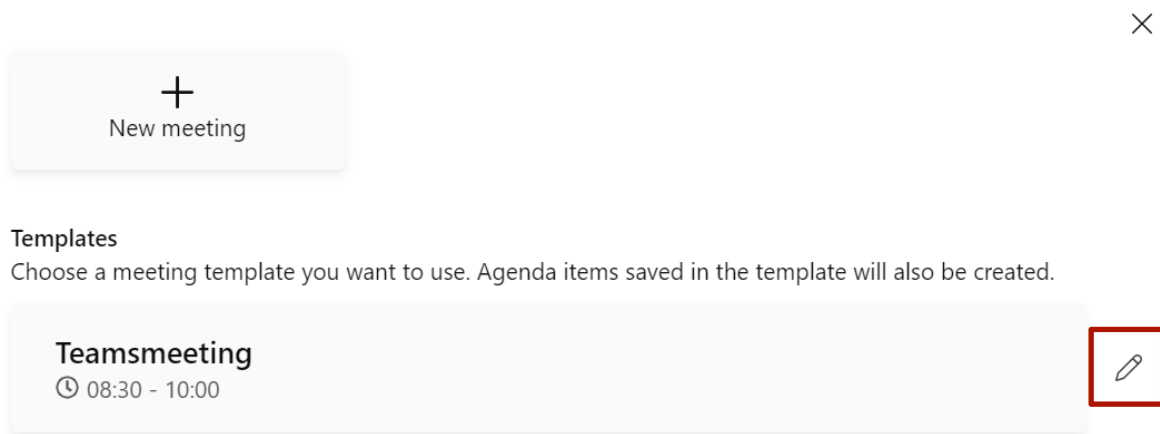
Meeting Secretary
☐

Link

× Cancel Save

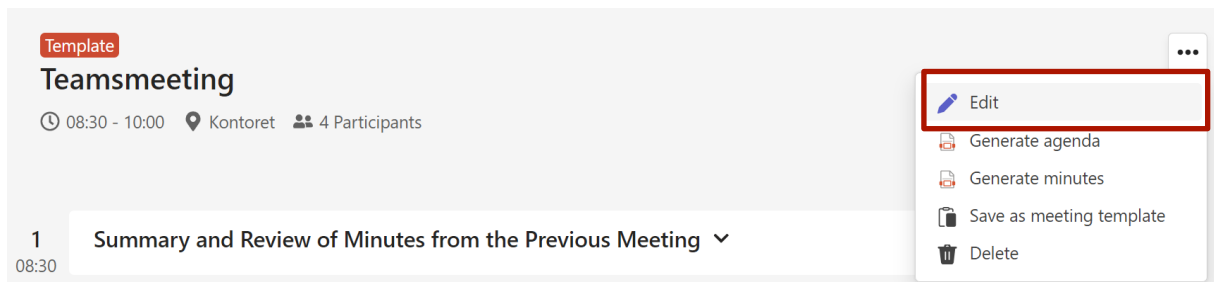
Edit Meeting Template

To find the templates, click on “New Meeting” and then click on the edit icon.



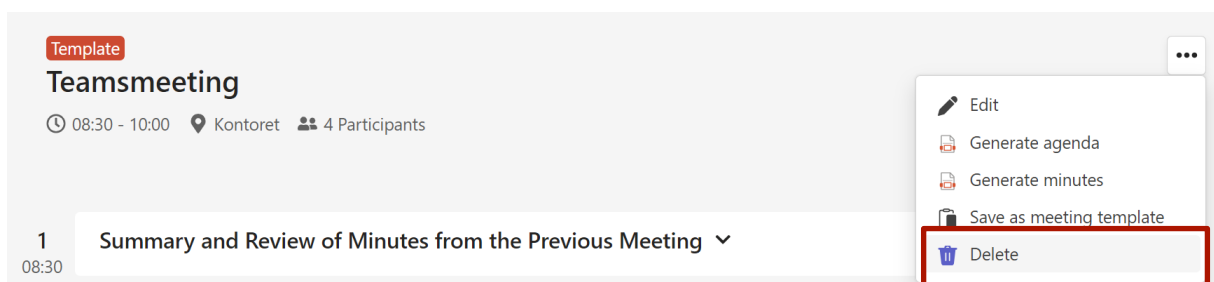
Edit General Information

Click on the menu button represented by three dots and select “Edit”. You can then change the general information of the meeting template.



Delete Meeting Template

Select "Delete" from the menu within the meeting, then click on the trash can icon and confirm to delete the meeting template.

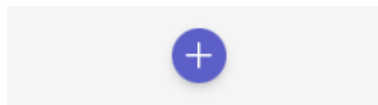


Create a Fixed Agenda for Meeting Template

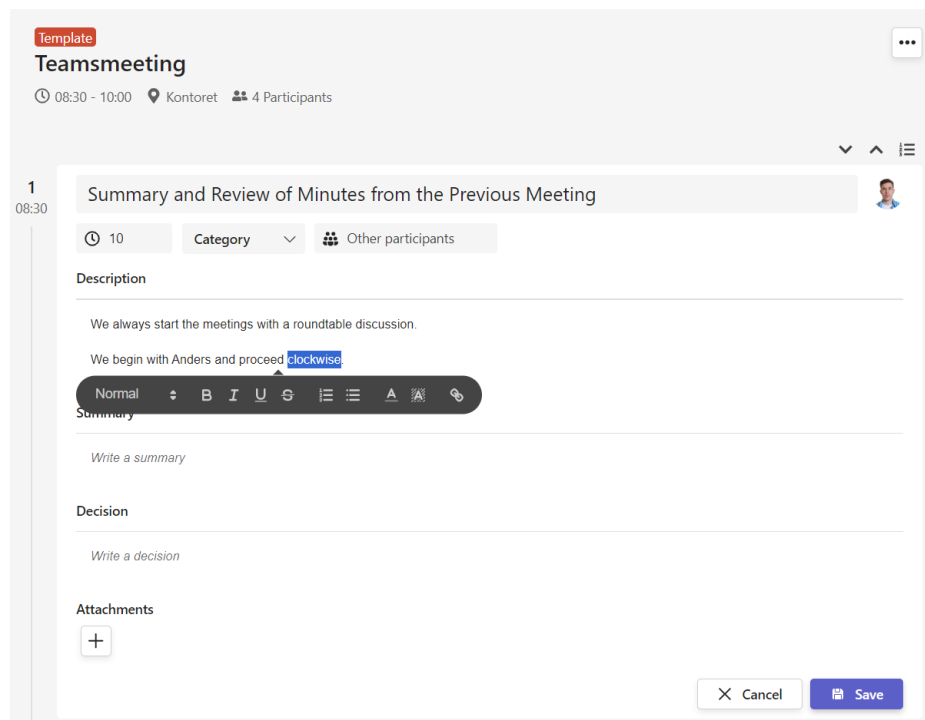
To create fixed agenda items in a meeting template, you can add the items when editing the template. This ensures that the fixed points are automatically included in all meetings based on this template.

New Item

Add a new item to the agenda by clicking the plus sign in the list on the Agenda tab.



The only fields you *must* fill out are the title and category. However, it might be beneficial to consider the other options as well. See the explanation of all fields below the image for a better understanding of their functions and how they can be tailored to your needs.



Category

Shows what type of case it is.

Time

By specifying the time (minutes), it automatically will calculate the start time of the next case. If you change the order of the cases afterwards, the time will automatically recalculate.

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. To format the text, highlight the text you want to format, and a toolbar will appear. If you want to have fixed text in the description field, you can add this to the template.

Responsible

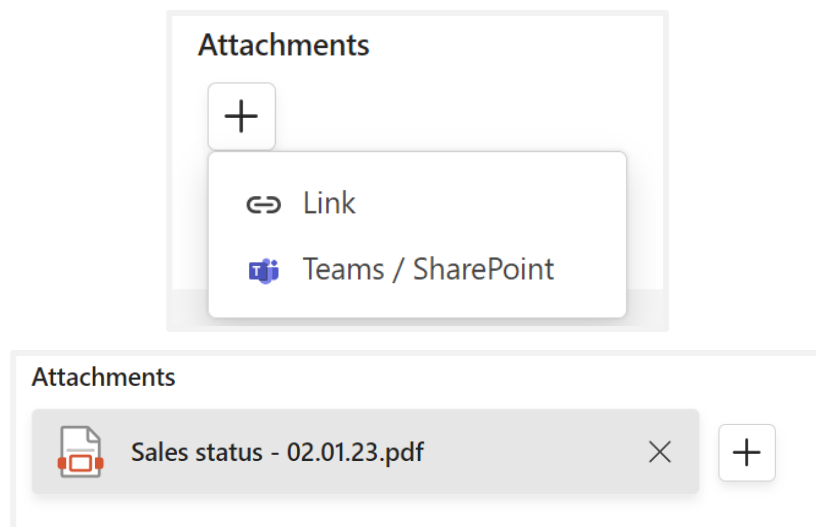
Enter the person responsible for the case.

Other (guest) Participants

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

Documents/Attachments

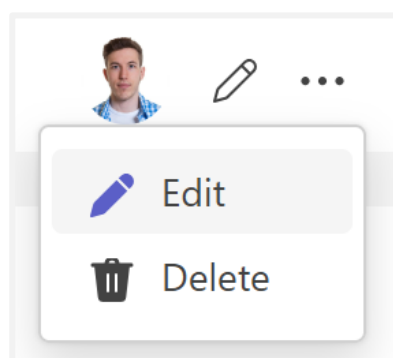
Choose between navigating to the correct file in SharePoint or linking to an existing file that is accessible to everyone.



Case documents are added and displayed per case, but you will also find a comprehensive overview of case documents under "Attachments."

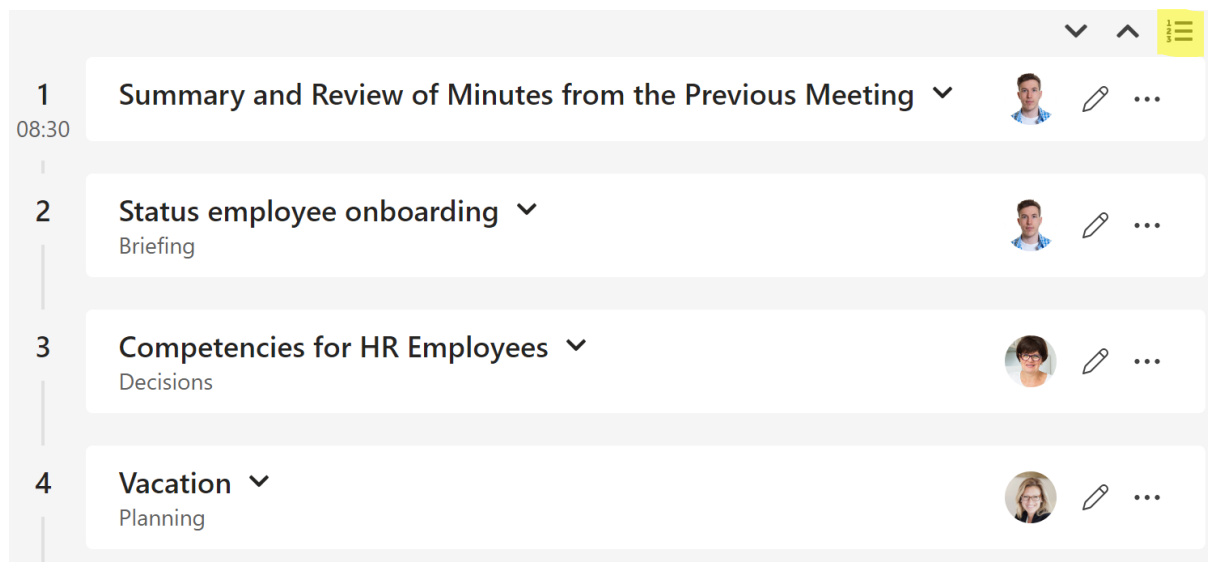
Edit or Delete a Case

Click on the action button and choose what you want to do.



Change the Case Order

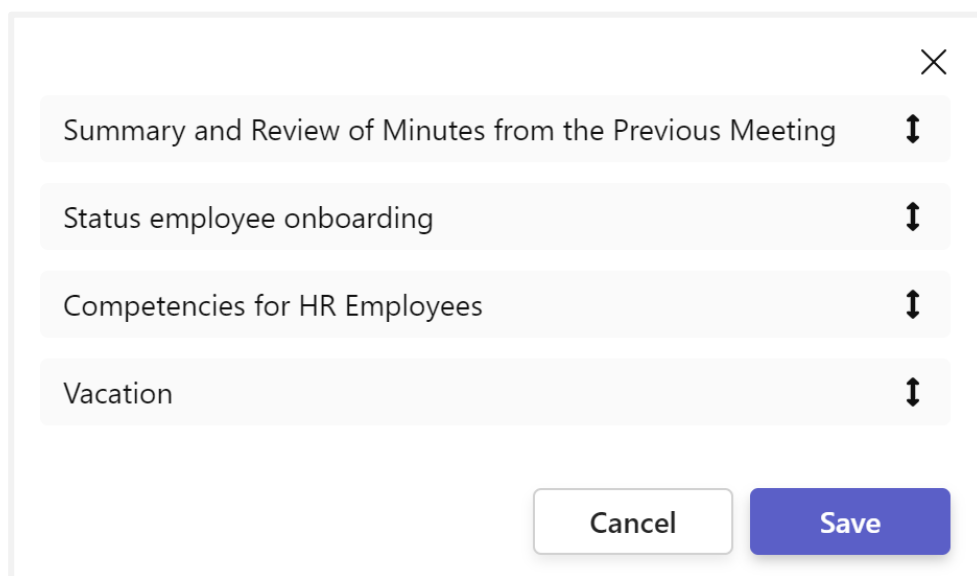
Click on the symbol as shown in the picture below.



The screenshot shows a meeting agenda with four items. Each item is represented by a card with a number, a title, a dropdown arrow, a user profile icon, an edit icon, and a more options icon. The items are:

- 1. Summary and Review of Minutes from the Previous Meeting (08:30)
- 2. Status employee onboarding (Briefing)
- 3. Competencies for HR Employees (Decisions)
- 4. Vacation (Planning)

And click and drag the different items to arrange them in the order you prefer. Then click Save.



The screenshot shows a drag-and-drop interface for reordering meeting items. The items are listed in a box with up and down arrows next to each item. The items are:

- Summary and Review of Minutes from the Previous Meeting
- Status employee onboarding
- Competencies for HR Employees
- Vacation

At the bottom of the interface are two buttons: "Cancel" and "Save".

Example of a Completed Meeting Template

The agenda items are listed in a view where everyone can see who is responsible and the type of each item.

Template


Teamsmeeting

🕒 08:30 - 10:00 📍 Kontoret 👥 4 Participants

▼ ▲ ☰


1
08:30

Summary and Review of Minutes from the Previous Meeting ▼

 ✎ ...


2

Status employee onboarding ▼
Briefing

 ✎ ...


3

Competencies for HR Employees ▼
Decisions

 ✎ ...

4

Vacation ▼
Planning

 ✎ ...

+

See also the separate user documentation with tips on how to create and conduct meetings.
