ENABLE 365 - Agenda

- Save time with effective meetings

AGENDA

User Manual

Introduction

Boost Your Meetings Efficiency with Enable 365 Agenda

Enable 365 Agenda is a powerful and user-friendly app designed to optimize meeting management – integrated within Microsoft Teams. With Agenda, you streamline every stage of your meetings—planning, execution, and follow-up. Effortlessly create agendas, assign tasks, and share meeting minutes to keep your team aligned and on track.

Agenda brings all your meeting information together in one centralized location, helping you stay organized and ensuring everyone has access to the latest updates. The app offers customizable meeting templates, tailored settings, and seamless integrations with tools like Outlook Calendar and Microsoft Planner, saving you time and eliminating duplicate work.

Once purchased, Agenda is ready to use across one or multiple Teams. This guide will walk you through the setup process and help you get started with Enable 365 Agenda.

Let's make your meetings more productive—good luck!

ENABLE 365 - Agenda
- Save time with effective meetings

Table of Content

Agenda – Key Concepts

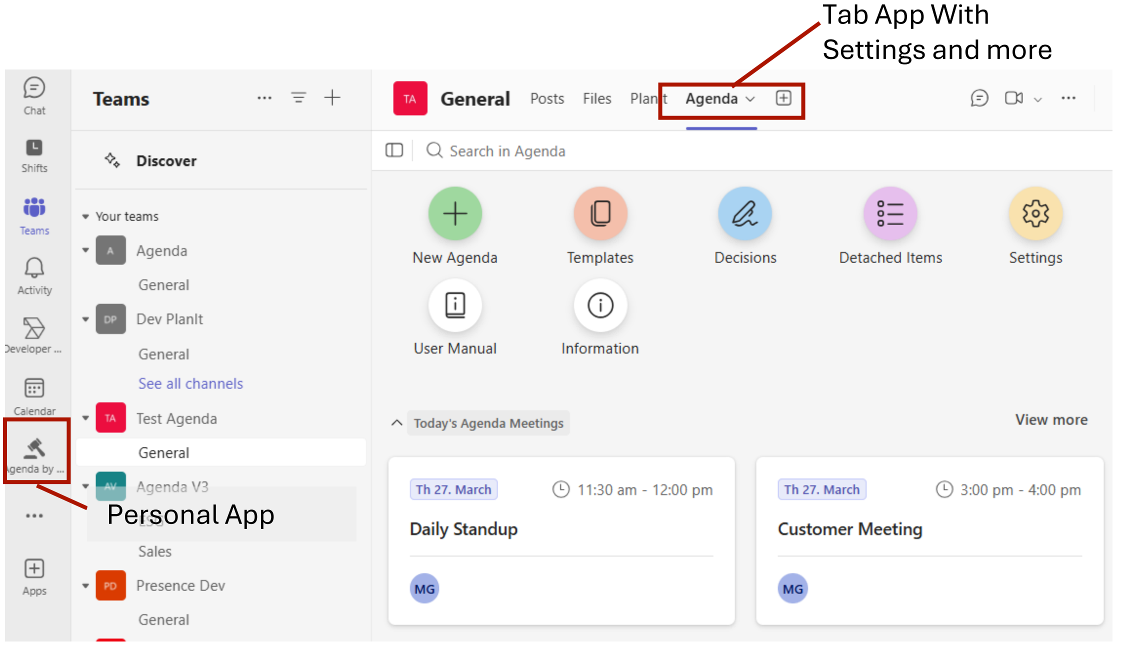
Create Professional Meeting Agenda's Based on your Calendar Meetings:
With the Agenda app you create professional meeting agendas based on your Outlook/Teams meetings. This way, Agenda picks up participants, room location, date and time.

Personal App and Tab App:
Agenda is available as both a Personal App in Microsoft Teams and as a Tab App within a Team Channel. To ensure a well-structured and organized experience, Agenda is designed to align with the information architecture of Microsoft Teams.

When creating an Agenda meeting based on your Outlook or Teams events, you determine which Team the meeting belongs to. All related meeting data—such as the agenda, meeting minutes, agenda items, and supporting documents—will be securely stored in Agenda within the selected Team.

Settings for Agenda are configured in the Tab App within each Team, giving you the flexibility to customize settings for individual Teams. For example, you can set unique meeting agenda templates, define archiving locations for minutes and agendas, and adjust other settings to match each Team's specific requirements.

The Personal App in Microsoft Teams provides you with a comprehensive overview of all the meetings you participate in. This makes it easy to stay organized and track your responsibilities across various Teams and events.



Agenda – Your Personal App

What is a Personal App?

Agenda is available as a standard Teams app in the team tab (as described in the setup) and also as a personal app! A personal app tailored to you can be found in the Microsoft Teams menu on the left.

Agenda's advantage as a personal app is that it provides a comprehensive overview of all the meetings you participate in. You create Agenda meetings using from your calendar (Outlook/Teams) events.

Note! Agenda as a personal app is not available for users with the team license solution from Enable

Agenda – Your Personal App

How to Add a Personal App

To add Agenda as a personal app, follow these steps:

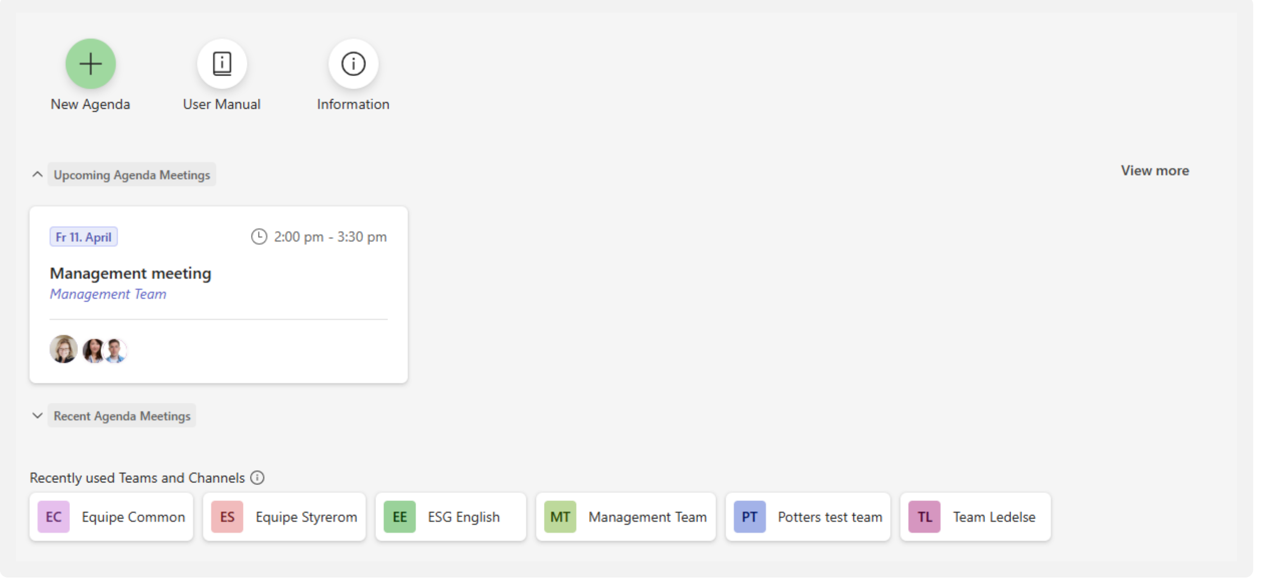
- Click on the three dots in the left-hand menu or select "Apps" from the same menu.
- Search for "Agenda."
- Click "Add as a personal app."

Alternatively, an IT administrator can pin Agenda to the left-hand menu. In that case, Agenda will already be available, and you can start using it as a personal app immediately! The app will then continuously sync with your calendar, ensuring that your schedule is always up to date. It will retrieve meetings, but keep in mind that if a meeting is not in your calendar—for example, because it was created through Agenda—the personal app will not be able to display that meeting.

Note! The personal app will not use the settings configured for Agenda in the team

Agenda – Your Personal App

Overview of the Home Page in your Personal app



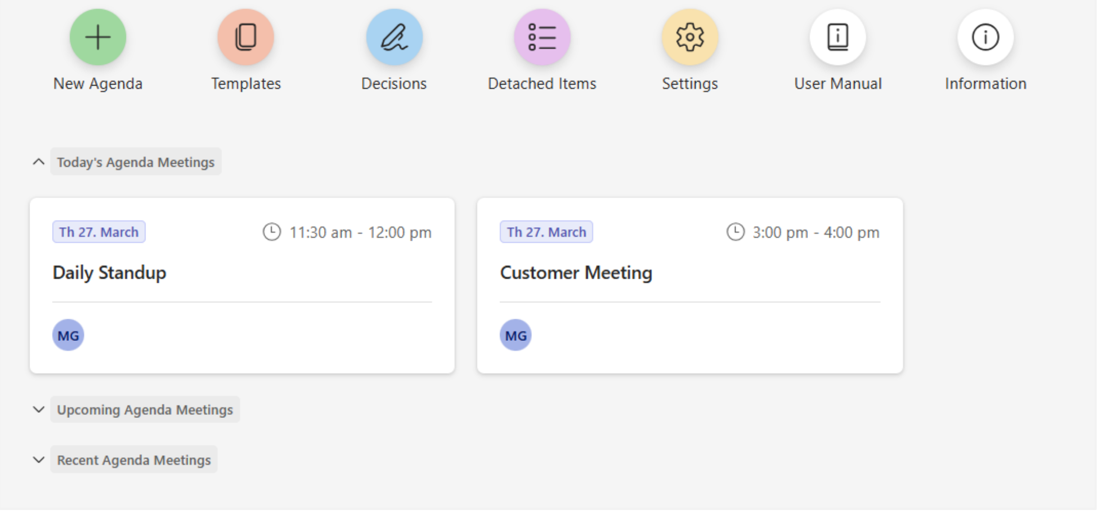
1. **New Agenda:** To connect an existing outlook calendar event to Agenda
2. **User Manual**: Links to the Agenda User Manual
3. **Information**: Information about support and version, as well as the first-time introduction wizard.

Today's, upcoming, and **recent** agenda meetings are displayed on the home page, providing a clear and comprehensive overview.

Recently used Teams and Channels lets you easily navigate to your last used Teams.

Agenda Home Page

Overview of the Home Page in a Team



1. **New Agenda:** To connect an existing outlook calendar event to Agenda
2. **Templates**: Create or select existing templates
3. **Decisions**: Overview of decisions made in previous meetings
4. **Detached Items**: Overview of Agenda items that have been detached from meetings
5. **Settings**: Settings for the Agenda app
6. **User Manual**: Links to the Agenda User Manual
7. **Information**: Information about support and version, as well as the first-time introduction wizard.

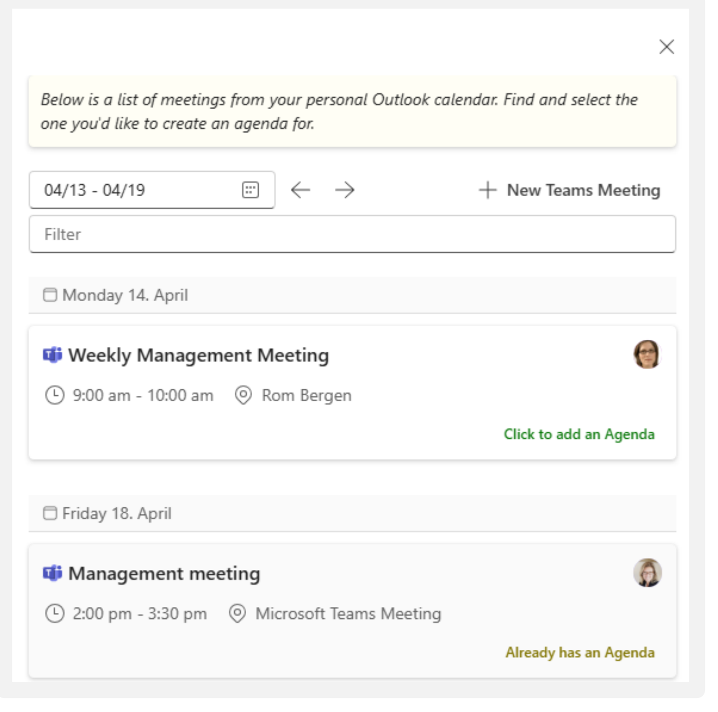
Today's, upcoming, and **recent** agenda meetings are displayed on the home page, providing a clear and comprehensive overview.

Create Agenda

Teams Meetings

Using Agenda in meetings scheduled through Teams or Outlook allows you to benefit from Teams' solutions for conducting meetings while also taking advantage of the structure provided by Agenda.

You can create the meeting event in your Outlook or Teams Calendar, where you invite participants and meeting resource(s).



Then, to Create a professional meeting agenda:

1. Navigate to the Agenda App (Personal App or Tab App)
2. Click on “New Agenda” and navigate to the date to find the meeting you want to add a professional meeting agenda.
3. You will then be prompted to select the Team where the agenda should be saved. You should choose a Team that all meeting participants can access, allowing them to view the content easily.

Now, the Agenda is ready to use for your meeting!

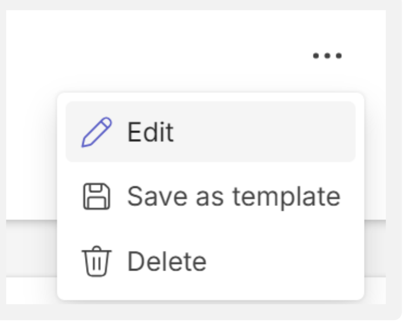
Note: Only the meeting organizer can link the Agenda to the Teams meeting. Once the meeting organizer has done so, Agenda will become visible in your personal app.

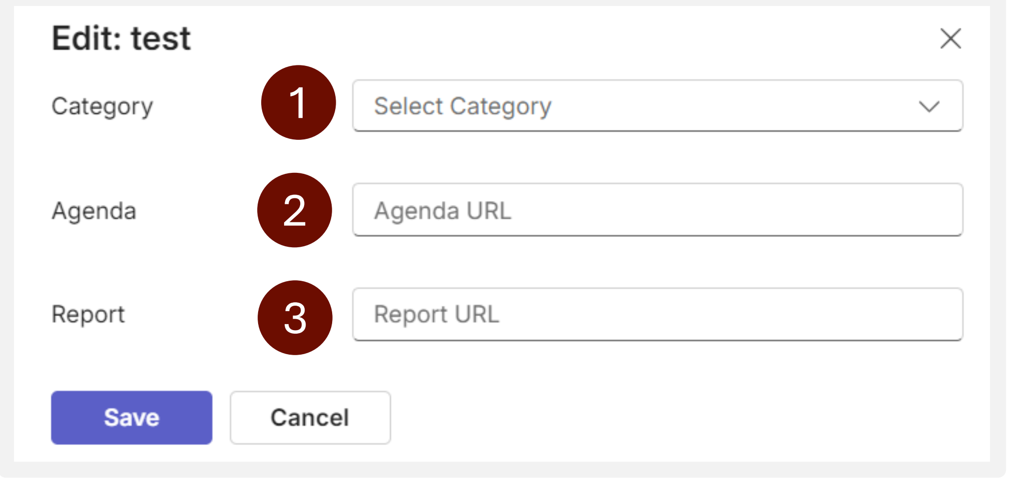
Edit Agenda Details

To change meeting information related to the Teams meeting, you must go to your calendar and edit the meeting from there.

To edit specific meeting details

- Click on the "..." (More Options) button and select "Edit."





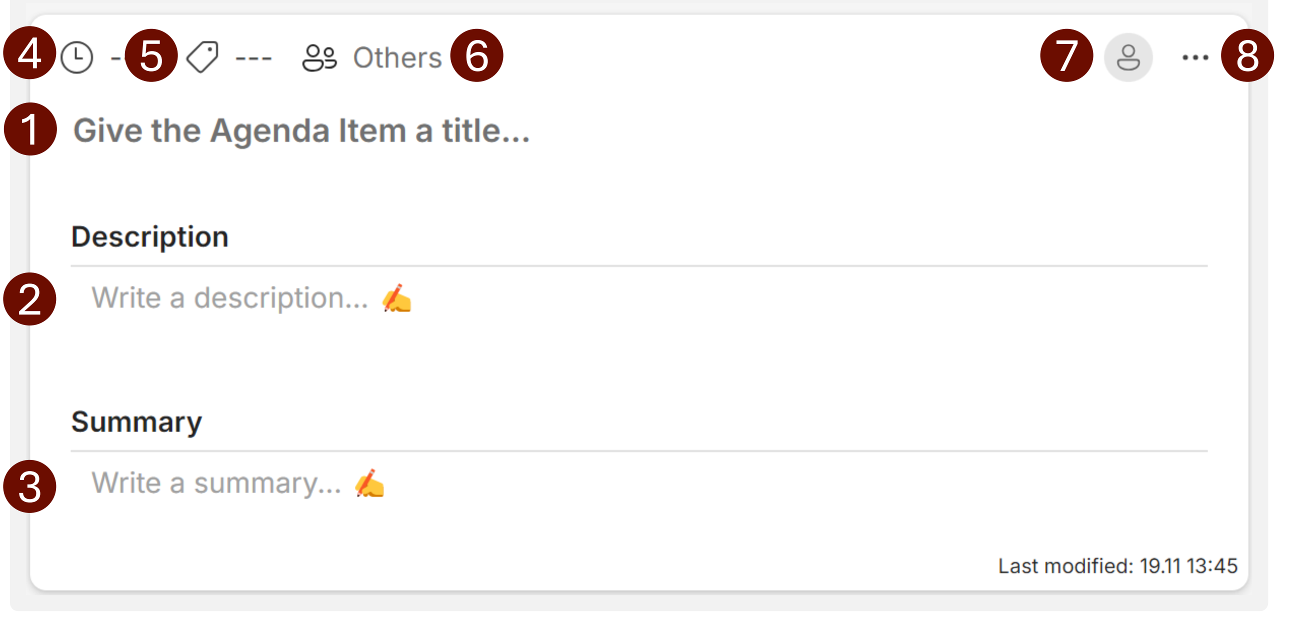
1. Edit the Category of the Meeting
2. Edit the Link to the Agenda PDF
3. Edit the Link to the Minutes PDF

Agenda Items

Creating Agenda Items

To make your meeting a fully functional agenda, you need to create items for the meeting. When you click on "New Agenda Item," a form will open where you can add details for a new agenda item:

1. **Title:** Provide a clear and concise title for the agenda item.
2. **Description:** Write a short description that provides the necessary context for the item.
3. **Summary:** Add a summary that can be updated during or after the meeting.
4. **Estimated Time:** Specify the estimated time needed for discussing the item.
5. **Category:** Choose a category to improve the organization and overview of agenda items.
6. **External Participants:** Add external participants if needed.
7. **Responsible Person:** Select the person responsible for the agenda item.
8. **More Options:** Click this option to reveal additional settings and possibilities.

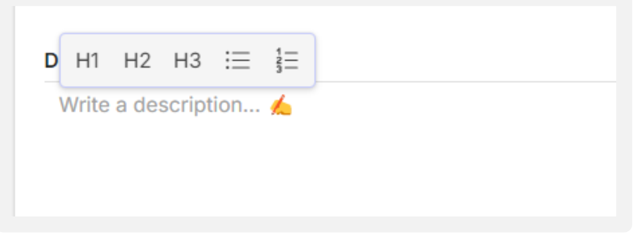


Agenda Items

Text Formatting

When you start writing in the description, summary, or decision fields, you can enhance the text format with the following options:

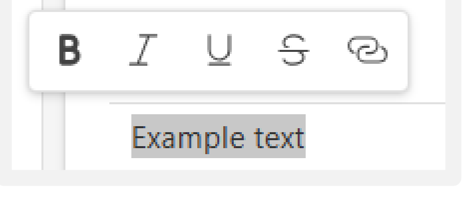
1. H1, H2, or H3 Headers:
    - Use these to create structured headings for better readability.
2. Bullet List:
    - Organize content into simple, unordered lists.
3. Numbered List:
    - Use for ordered or sequential items.



To format specific parts of the text in description, summary, or decision fields, highlight the text you want to format

Choose from the following options:

- **Bold:** Make text stand out.
- *Italic*: Add emphasis or style to text.
- Underline: Highlight important text.
- ~~Strikethrough~~: Indicate removed or completed items.
- Link: Add hyperlinks to provide additional context or references.



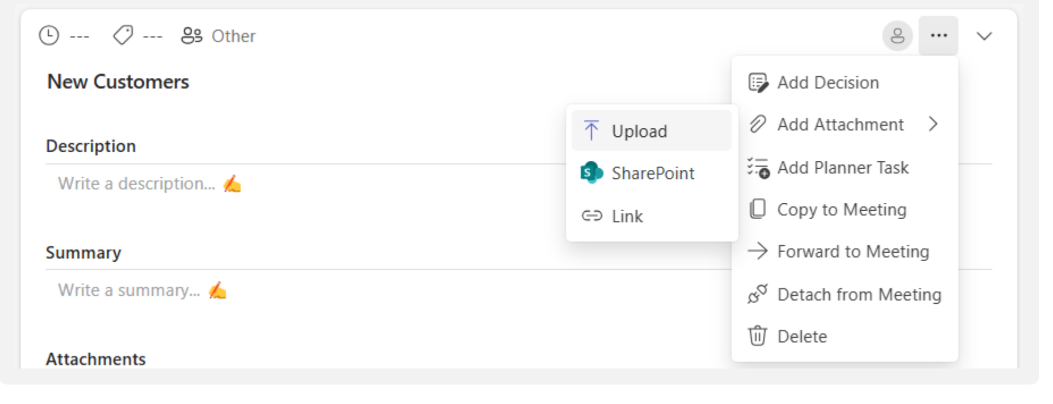
Agenda Items

Add a New Attachment

You can add relevant attachments to each agenda item. Follow the steps below to add a new attachment:

1. On the agenda item where you want to add an attachment, click on the three dots (More Options) at the top right of the item.
2. Select "Add Attachment" and choose where you want to retrieve the attachment from:
   - **Upload**: Upload a document from your computer. The document will then be stored in the team's area and only available to team members.
   - **SharePoint**: Navigate to the desired file in SharePoint. When selecting the file, you can either link to it or copy it into the agenda.
   - **Link**: Add a link to an existing file accessible to all team members.

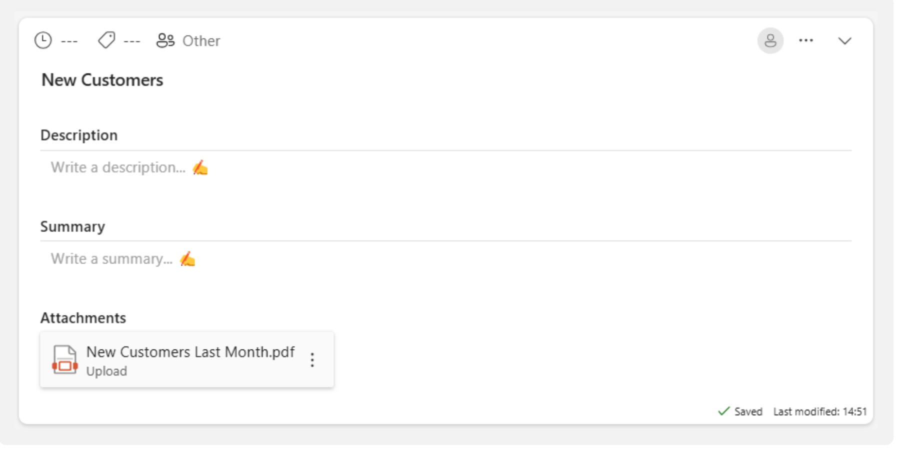
Attachments make it easier to share supporting documents, ensuring all relevant files are organized and accessible within your agenda.



Agenda Items

See Attachment in the Agenda Meeting

After you add an attachment to an Agenda Item, it will be visible under «Attachments» on the Agenda Item.

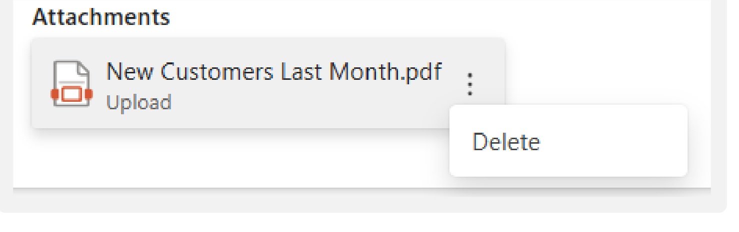


Remove an Attachment

To remove an attachment, click on the three dots to the right of the attachment you want to delete. Then click «Delete» and confirm your choice by clicking «OK».

Uploaded attachments will be deleted from the library.

Items linked to the Agenda Item will only have the link removed, not the actual document.

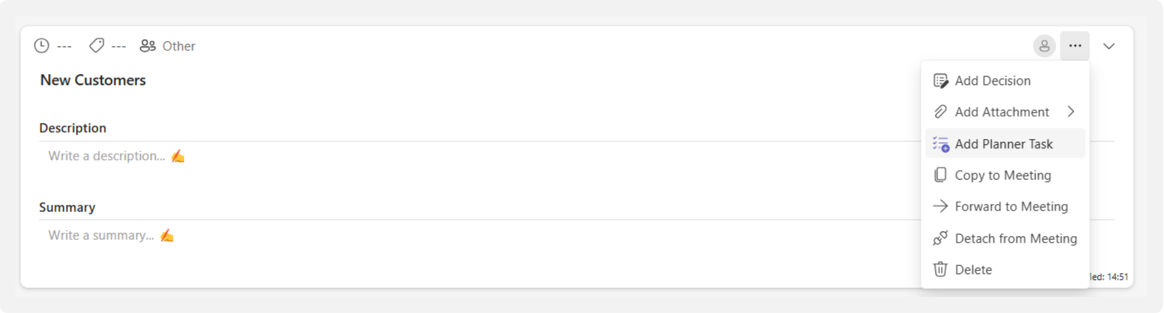


Agenda Items

Add a Planner Task

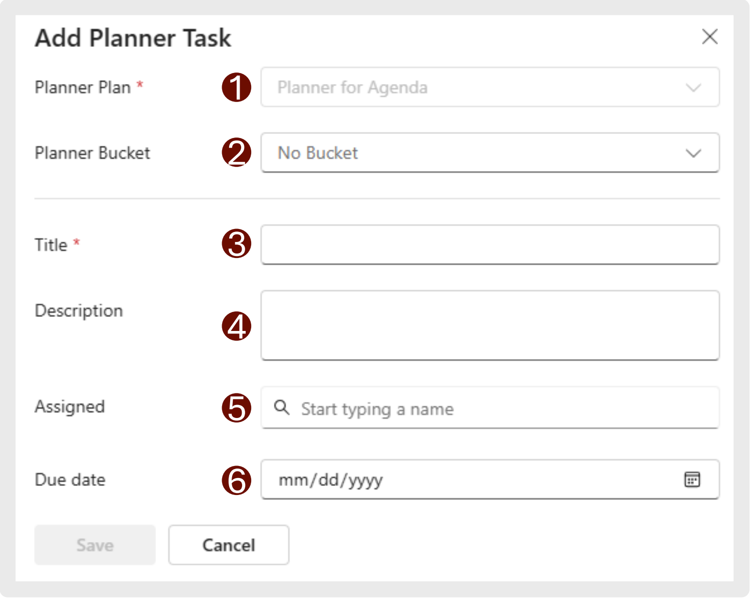
To link one or more Planner tasks to an Agenda Item, follow these simple steps:

1. On the desired Agenda Item, click on the three dots in the top-right corner.
2. Select «Add Planner Task» from the menu.



Next, you need to create the Planner task by filling out the following details:

1. **Planner Plan**: Select the plan you want to associate the task with. If the plan is set in settings, this is default selected and can not be changed.
2. **Planner Bucket:** Select the bucket you want to associate the task with.
3. **Title**: Enter a title for the task.
4. **Description**: Provide a brief description of what the task is about.
5. **Assignment**: Search for and select the person responsible for the task. This person will be assigned the task in Planner.
6. **Due Date**: Set a deadline for when the task needs to be completed.



Once you've filled out these fields, the Planner task will be linked to your Agenda Item for easy tracking and management."

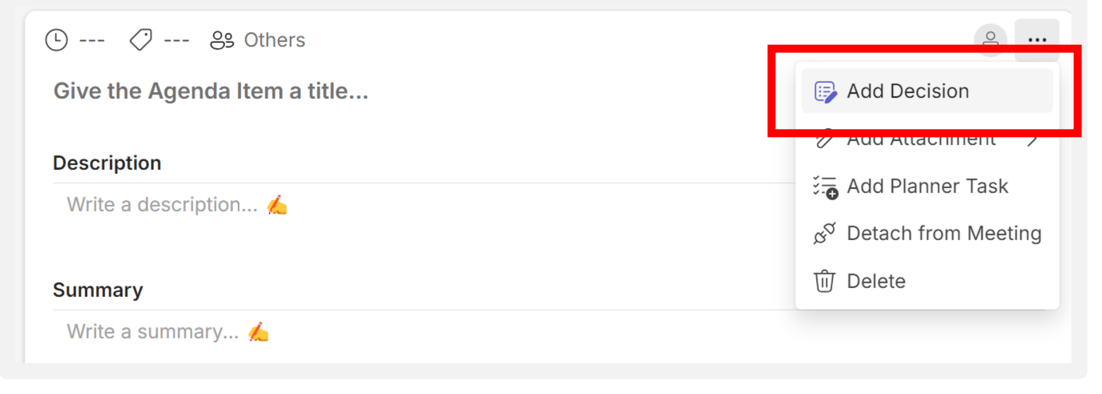
Note: *Only Planner Plans connected to the team will be displayed in the dropdown*

Agenda Items

Add a Decision

It is possible to add a decision to an Agenda Item. To do this, follow these steps:

1. On the agenda item where you want to link a decision, click on the "…" in the top right corner.
2. Click on "Add Decision"
3. The decision field will now be visible, and any decisions entered here can easily be found under the "Decision" tab on the Agenda home screen



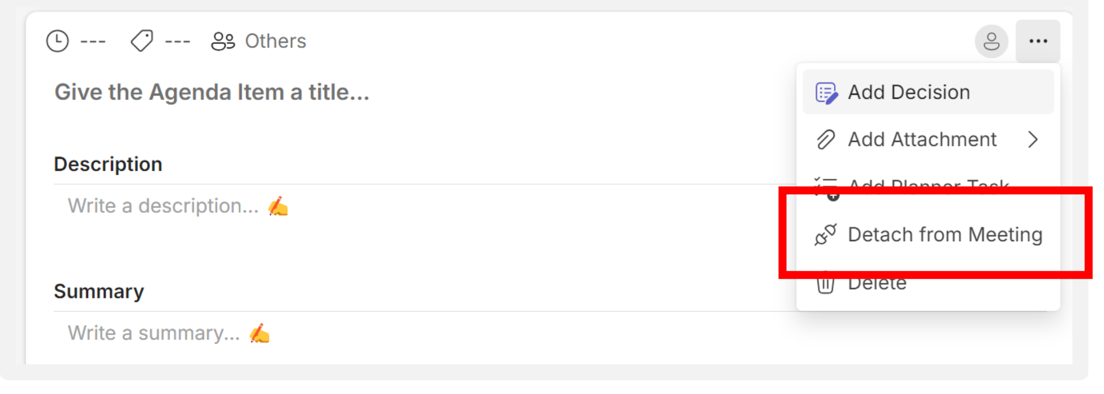
Agenda Items

Remove an Agenda Item from a Meeting

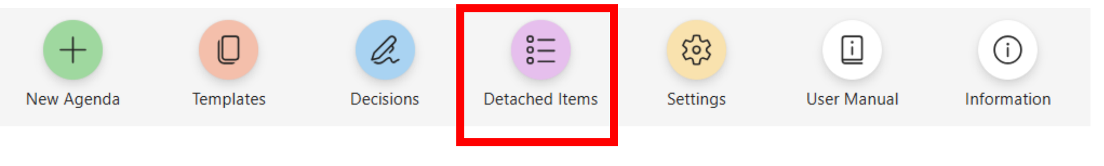
To remove an Agenda Item from a meeting, follow these steps:

1. On the Agenda Item you want to remove, click on the three dots (...) in the top-right corner
2. Select «Detach from Meeting» from the menu, and confirm

The Agenda Item will no longer be associated with the meeting but will remain available for future reference or reassignment.



Agenda Items that are not linked to a meeting can be found under the **'Detached Items'** tab.

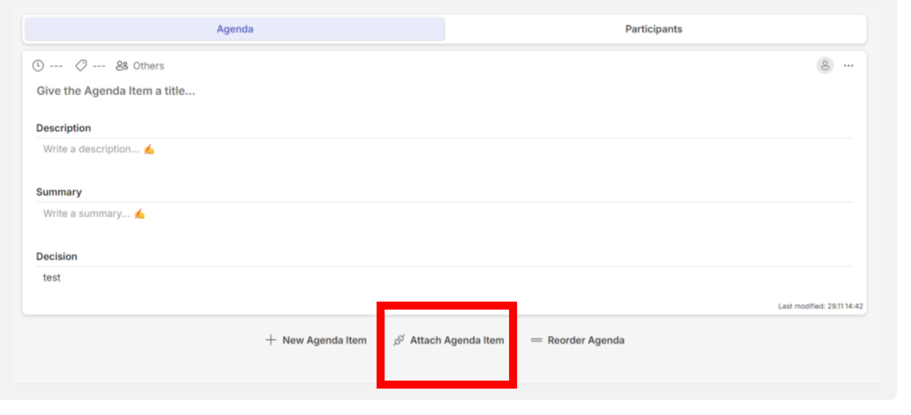


Agenda Items

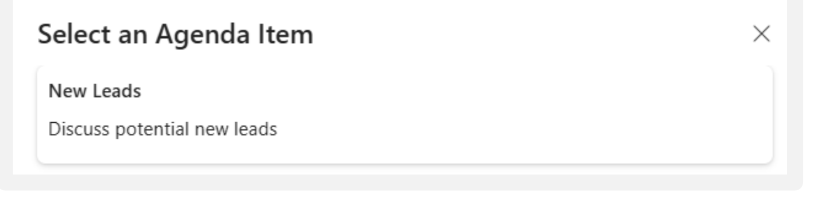
Add an Existing Agenda Item to a Meeting

To add an Agenda Item that was previously removed from a meeting, follow these steps:

1. In the meeting, click on **'Attach Agenda Item'** at the bottom center of the meeting screen.



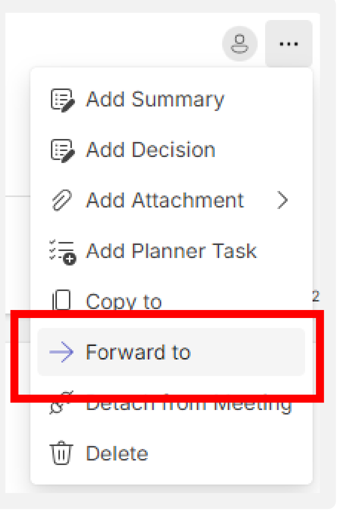
2. Next, select the Agenda Item you want to link to the meeting from the menu on the right and click **'Select'**.



3. The Agenda Item will then be visible in your meeting, and you can edit and adjust it as needed.

Agenda Item

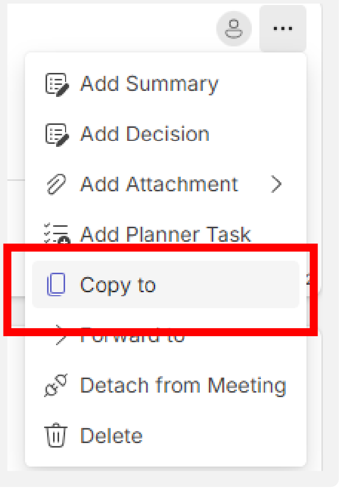
Forward an Agenda Item



To carry forward an Agenda Item to a future meeting, follow these steps:

1. On the Agenda Item you want to carry forward, click on the three dots (**...**) in the top-right corner of the Agenda Item.
2. Select **«Forward to»**
3. Choose the meeting where you want to carry the item forward.
4. The Agenda Item will now be linked to the selected future meeting, allowing you to continue working on it or discuss it further."

Copy an Agenda Item



If you want to copy an Agenda Item from one meeting to another, you can easily do this in the Agenda. The item, including all its content, will be duplicated and exist as two separate items in the respective meetings.

To copy an Agenda Item:

1. On the Agenda Item you want to copy, click on the three dots (**...**) in the top-right corner of the item.
2. Select **«Copy To»** from the menu.
3. In the panel on the right, select the meeting where you want to copy the item.
4. Confirm by clicking **«Select»** at the bottom of the panel.

A copy of the Agenda Item will now appear in the selected meeting, allowing you to work with it independently.

Note: *Both forwarding and copying of items require that a future meeting exist.*

Send Agenda in the Calendar Invite

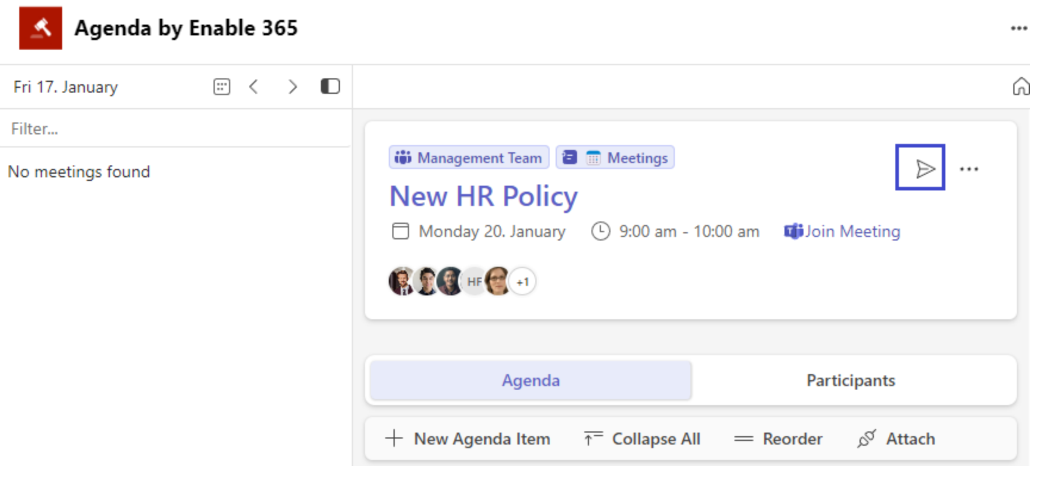
Sending the Meeting Agenda to Participants

To share the newly created meeting agenda with participants and update the calendar invitation in Outlook:

1.Click the **'Send'** button.

2.The meeting invitation will be updated to include the meeting agenda.

This ensures that all participants have access to the agenda and are well-prepared for the meeting.



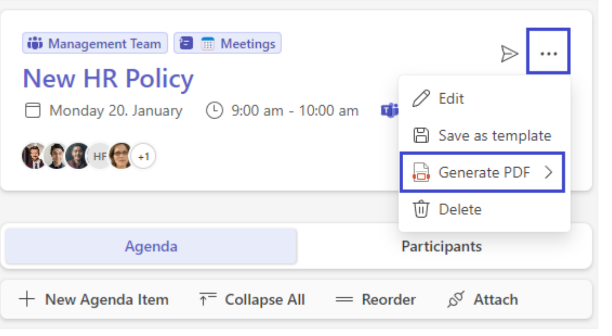
***Note:** Any participant can send and update the calendar invitation if the Calendar Meeting is a Channel Meeting. For regular Calendar invites, only the organizer can send and update the calendar invitation.*

Export Agenda Meetings

Generate Agenda as PDF

To save an agenda or meeting minutes, click on '...' at the top-right corner of the meeting. Then select 'Generate PDF,' choose either agenda or minutes and fill in the following information.

Depending on the configured settings, the agenda is saved as a PDF, either in a library within the Team or an intranet library.



1. **Specify File Name:** The meeting title and date are suggested as the default file name, but you can edit it as needed.

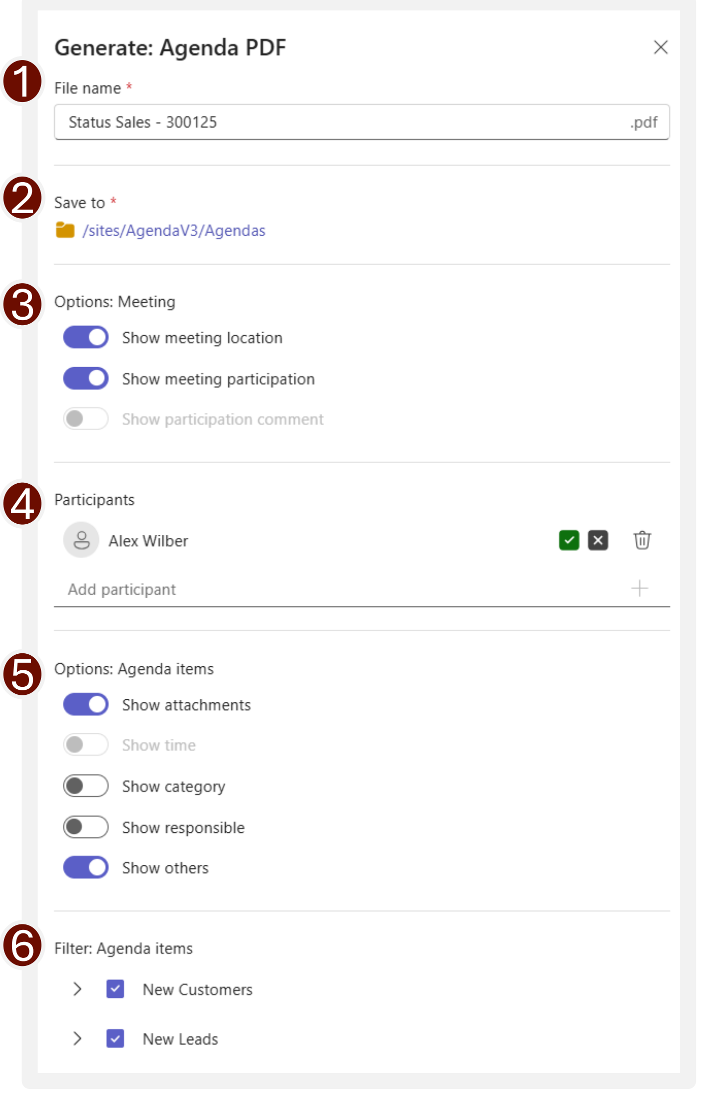
2. **Select Storage Location:** Choose where the file should be saved (e.g., a Team library or intranet library, depending on your settings).

3. **Include Meeting Information:** Decide what meeting-related details should be included in the PDF.

4. **Participants**: Show participants who were absent or not in the meeting

5. **Select Agenda Items:** Choose which agenda items to include in the PDF.

6. **Attach Supporting Documents:** Select the attachments to include in the minutes. Attachments will be listed under a heading at the bottom of each relevant agenda item.



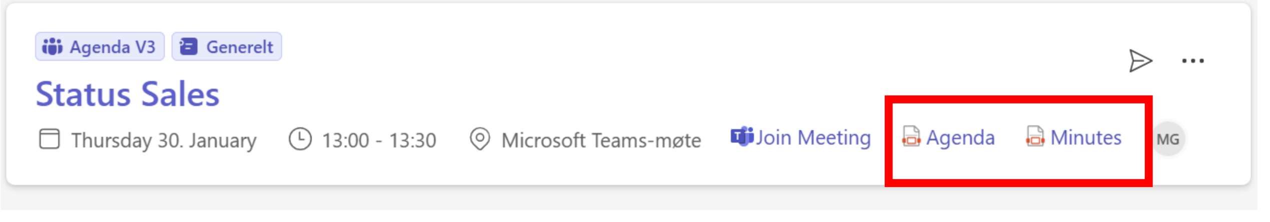
Note: *A meeting must have at least one agenda item before you can generate a PDF.*

Export Agenda Meetings

Generate Agenda as PDF

Save the file by clicking 'Save' at the bottom of the page. You can also download the PDF of the exported Agenda by clicking "Download".

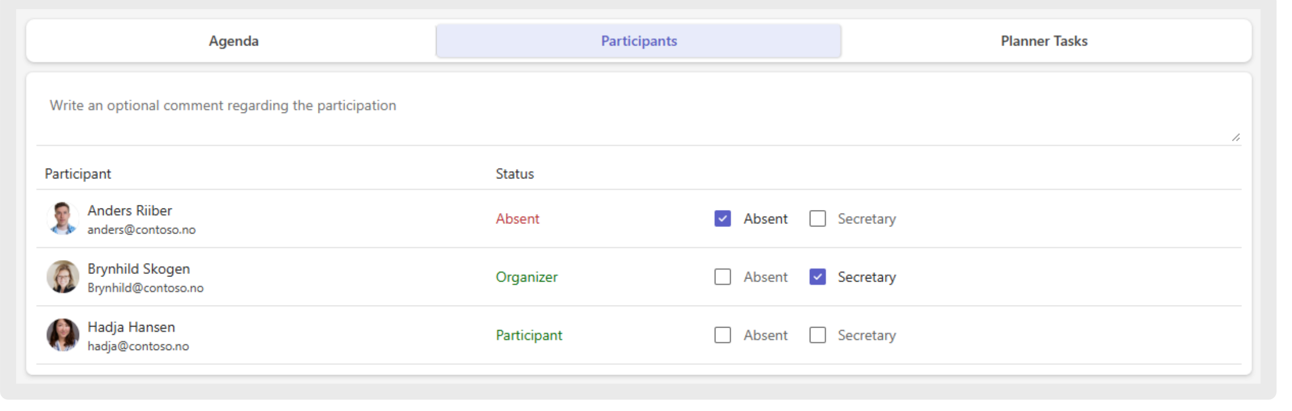
You can view the generated PDF files by clicking either 'Agenda' or 'Minutes' at the top of the meeting menu.



Conducting Meetings

Participation and Absence

In the **Participants tab**, you can uncheck the names of individuals absent at the meeting. Participation will also be reflected in the meeting minutes. Additionally, you can assign one or more note-takers by checking the appropriate boxes.

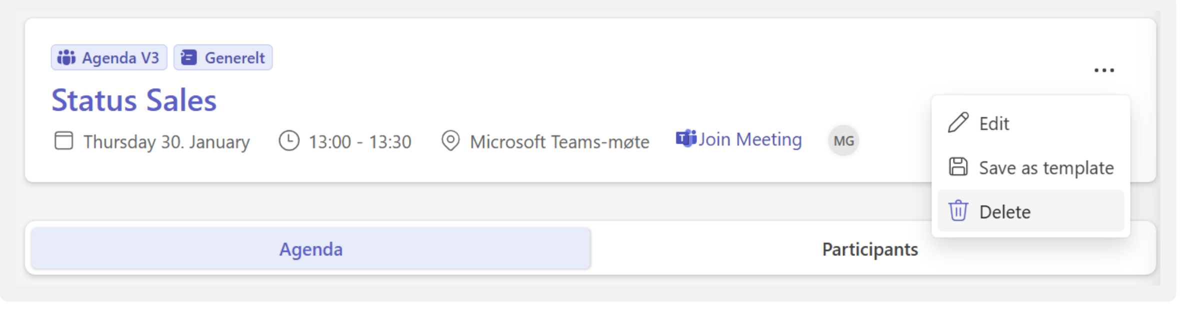


A free-text field is also available at the top, where you can add additional comments about attendance.

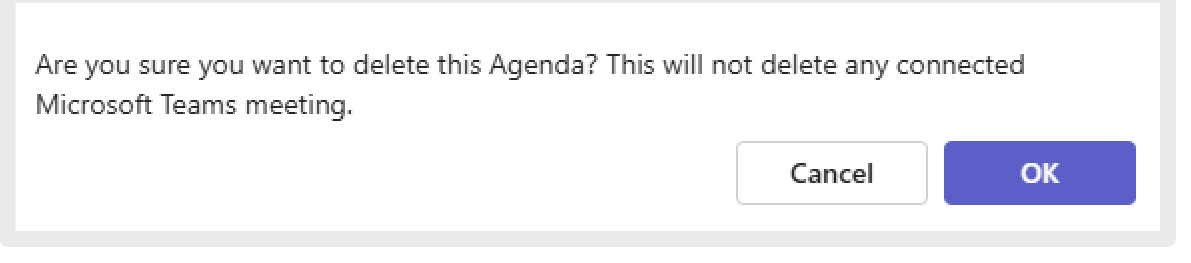
Delete Agenda

Deleting Agenda

If you wish to delete a Agenda, you can do so by selecting "..." in the top right corner of the Agenda you want to delete.



Agendas containing items cannot be deleted. They must either be deleted individually, carried forward, or disconnected from the Agenda.

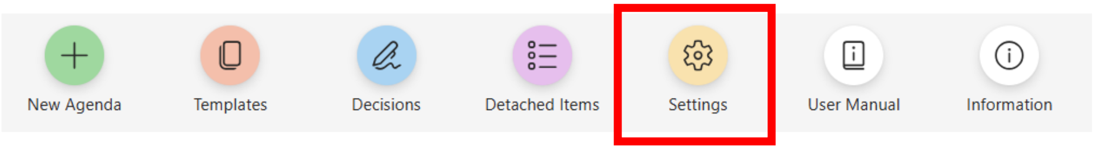


Deleting Agendas will not remove the connected Teams meeting.

Settings

Who can Manage Settings?

Only team owners have access to the settings menu in Agenda.



Current Channel Only

The "Current Channel Only" option controls whether only meetings associated with Agenda in the current channel are displayed. If this option is disabled, all team Agenda meetings will be visible.

Settings

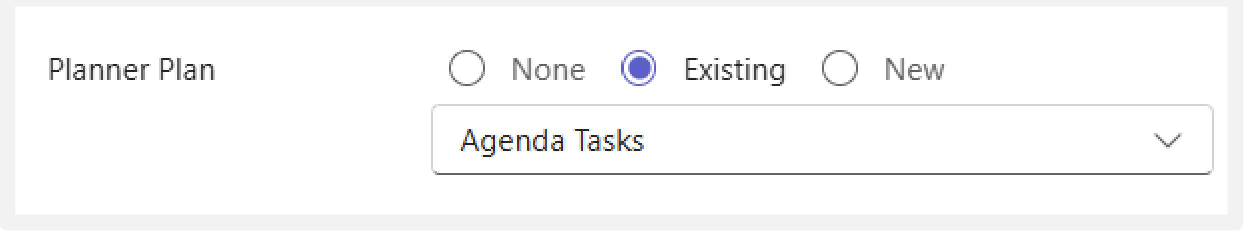
Planner Plan

You can easily integrate Planner into the Agenda app. In settings, you can choose the default option for Planner in Agenda:

- **None:** Each Planner task created through Agenda can choose freely which Planner Plan and bucket it should be placed in

- **Existing:** Choose between existing Planner Plans. This option will force all Planner tasks created through Agenda to be placed in this Plan. The user can still choose the bucket.

- **New:** Create a new Planner Plan through Agenda.



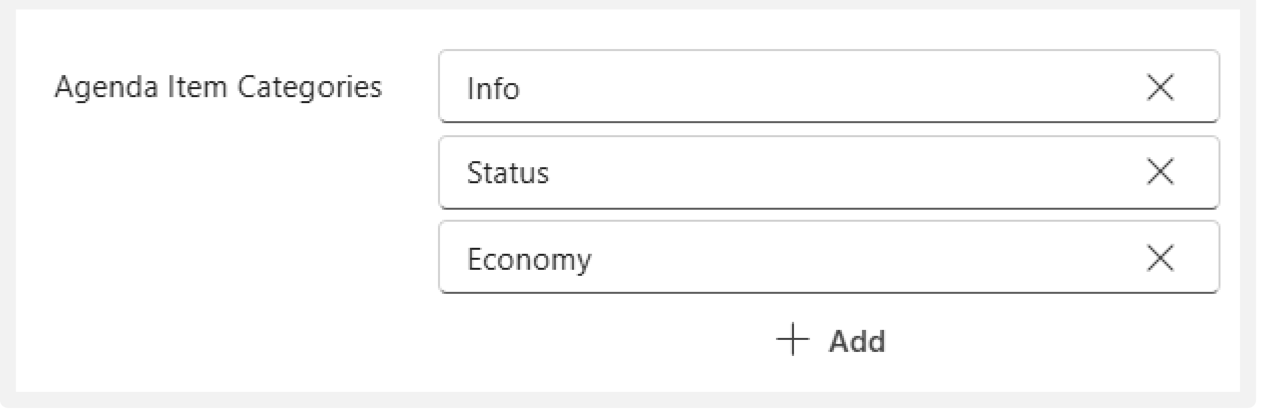
Meeting Categories

For easier meeting management, labeling each meeting with its category is possible. You can add and remove new categories by either pressing “Add” to add or “X” to remove the category.

Settings

Agenda Item Categories

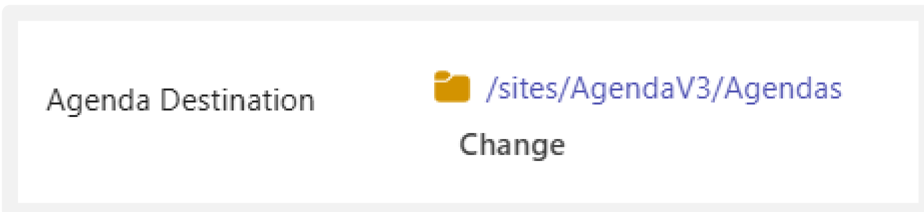
Labeling each Agenda Item with its category is possible for easier meeting item management. You can add and remove new categories by either pressing “Add” to add or “X” to remove the category.



Settings

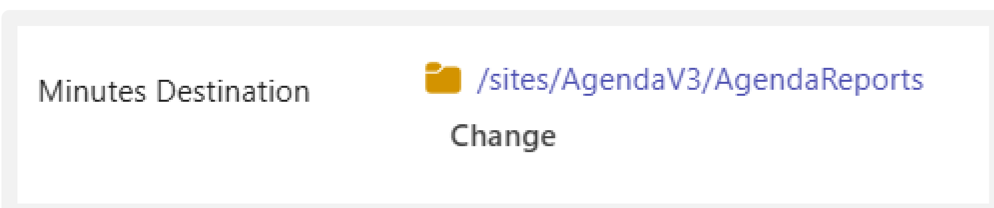
Agenda Destination

You can change the default location of where Agenda PDFs are stored by clicking "Change" and navigating to the desired folder.



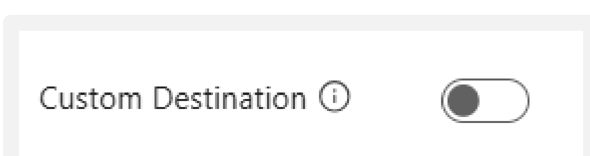
Minutes Destination

You can change the default location of where Minutes PDFs are stored by clicking "Change" and navigating to the desired folder.



Custom Destination

Enabling this allows users to select a different save location when creating Agendas or Minutes each time they export to PDF.



***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.*

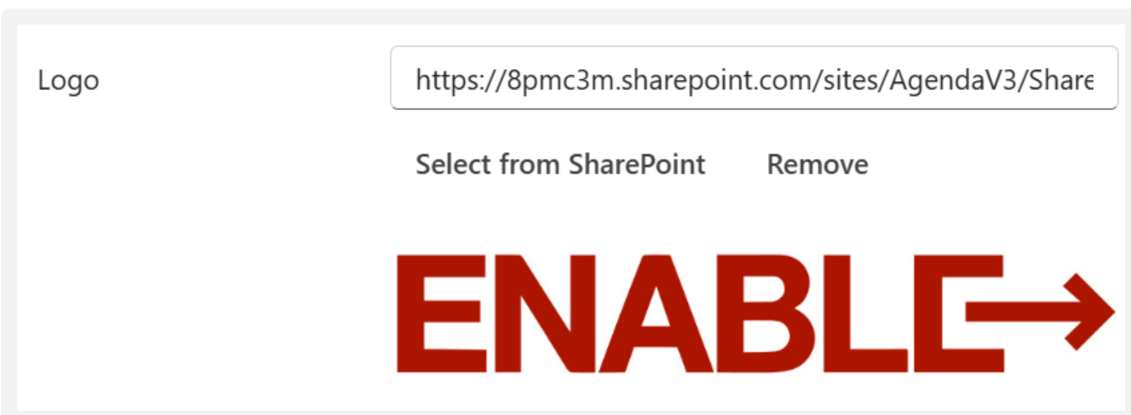
Settings

Logo

You can add a standard logo that will be placed in the top left corner of agendas and minutes here. There are two options for adding the logo:

1. **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).

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



Remember to save!
