Meetings

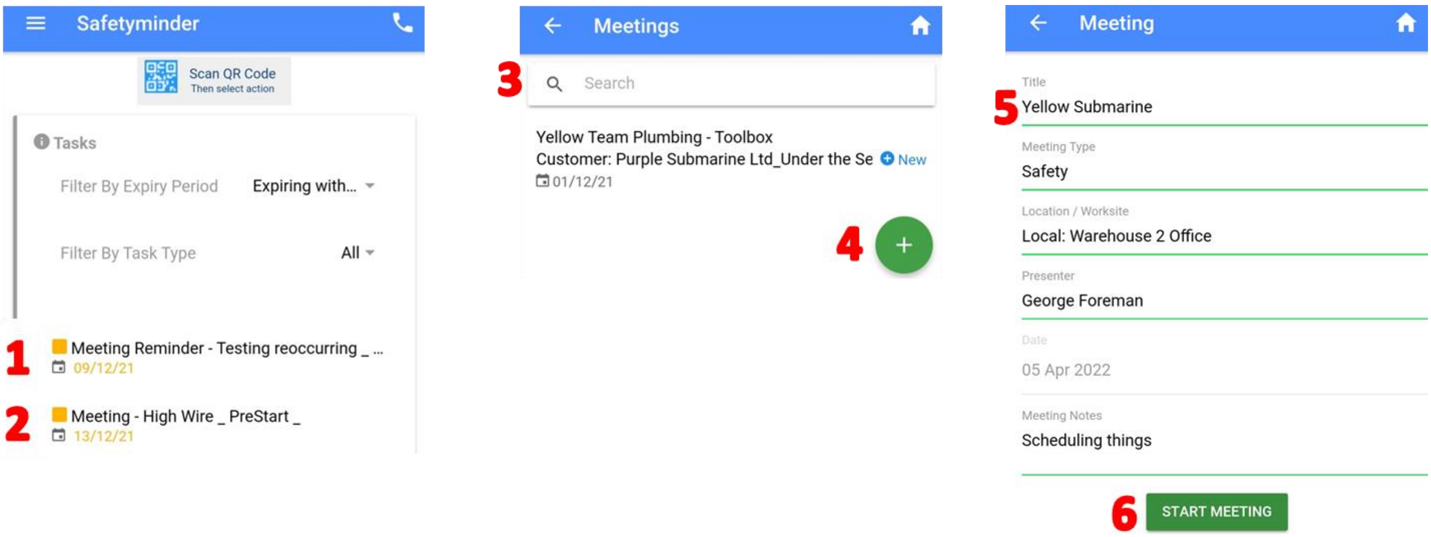
1. On the home page you will see Meeting Reminders where you have been selected as an attendee.
   These are for your reference only and do not have a tasks assigned to them.

2. When you are the presenter you will have a Meeting task on your home page, clicking on this will take you to Registers/Meetings.

3. Use the search field to narrow down the display.
4. Click + to add a new meeting – see below for creating new meetings.

5. The meeting information will populate as shown, including any notes.

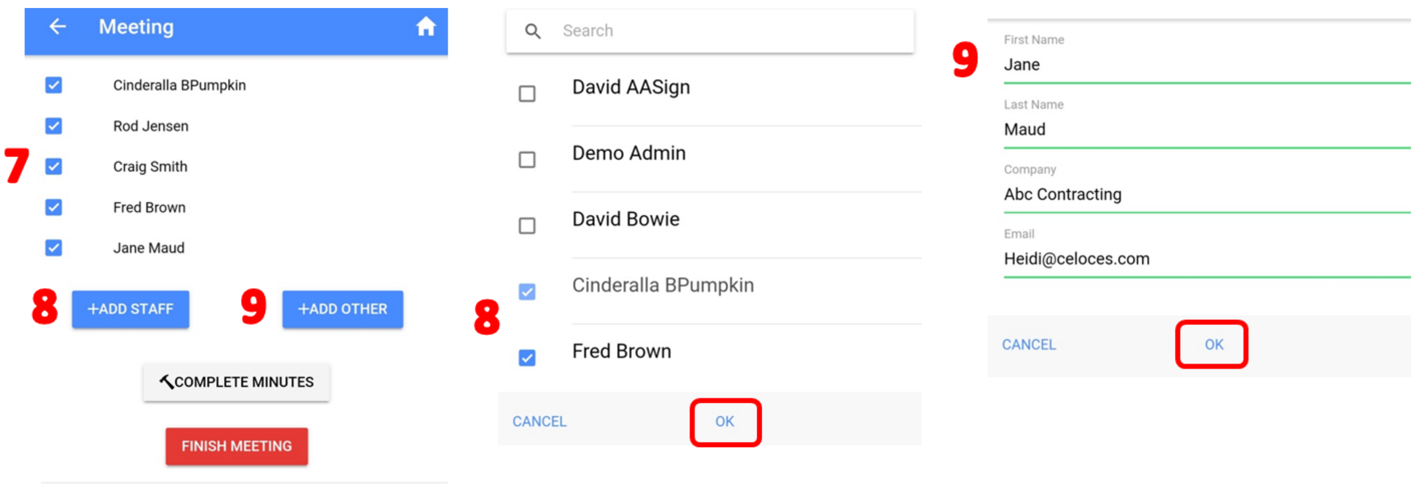
6. Click **START MEETING**.



7. Tick Staff who are in attendance.

8. Click **+ADD STAFF** to include more staff, tick additional staff required & click OK.
   Staff already selected will show in light blue.

9. Click **+ADD OTHER** to include other external attendees e.g. supplier representative etc.
   Complete the details as shown and click OK.



10. Click COMPLETE MINUTES. This will open the form selected, fill in as required.

11. Click **COMPLETE** once the form has been completed. Information like the meeting title, type, location & notes can be auto populated into the template. There is also a special widget to create a list of attendees for sign off.

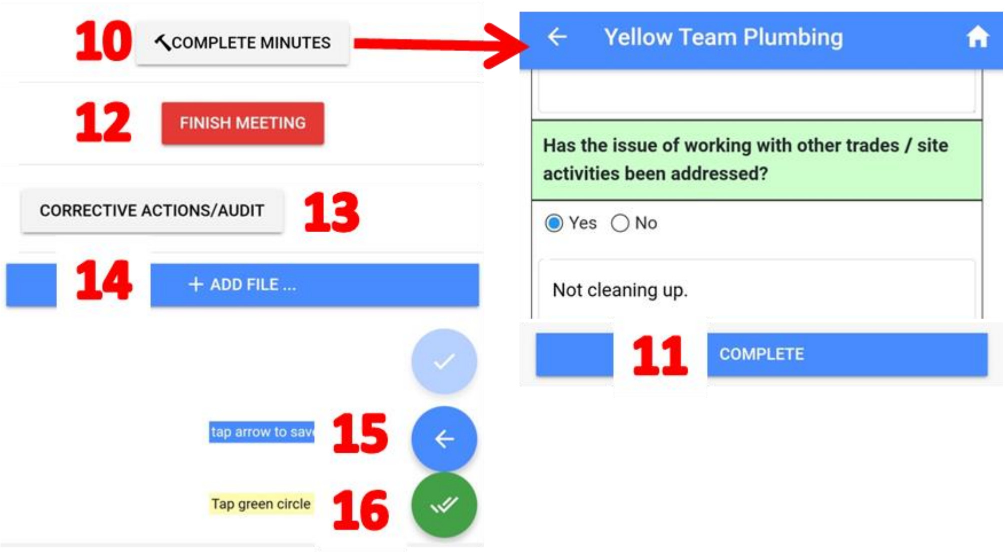
12. Click **FINISH MEETING** when done. This can be done after corrective actions & adding files.

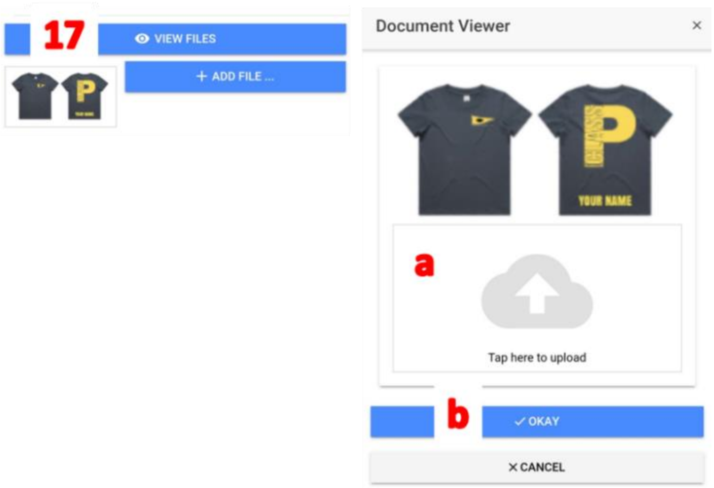
13. Click CORRECTIVE ACTIONS/AUDITS to add items required to this register.

14. Click **+ADD FILE**, to attach other files – see below.

15. Click to save and return at any stage.

16. Click when everything has been completed to sign off the meeting.





17. Click **VIEW FILES** to see any documents attached or add new files.

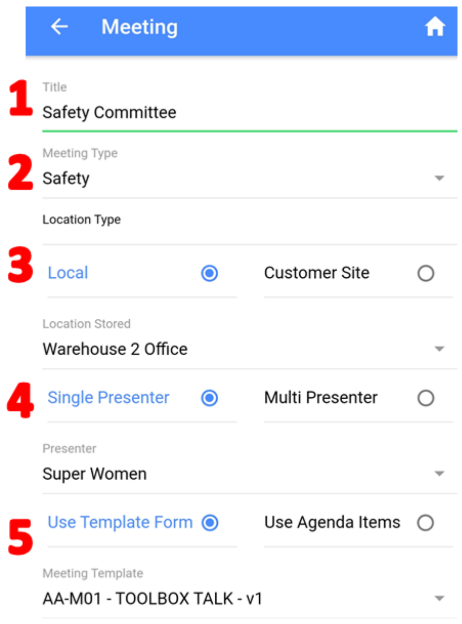
    a. Click in the box to **upload a file**.

    b. Click **✓ OKAY** when done.

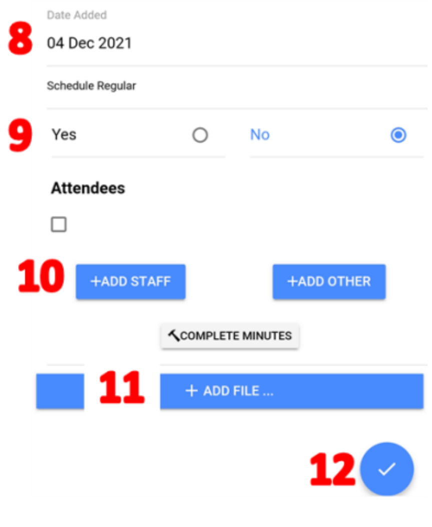
Create New Meeting

1. Type in a Title for the meeting.
2. Select the Meeting Type.
3. Select Location Type either Local or Customer Site & select details as required.
4. Single Presenter will be the default – this is the only option currently working.
5. Use Template Form will be the default – this is the only option currently working.
   Select the Meeting Template.

   NOTE: Only forms with type = Meeting & Status = Locked will show.



6. Click on Requested Start Date & Time – scroll through and select the required date & time.
7. Click DONE when it's correct.
   Repeat the process for Requested Finish Date & Time.



8. Date Added will auto populate.
9. Schedule Regular will default to No. Change to Yes if you want regular meetings to be created & select the frequency.
10. Click for attendees.
11. Click to include any documents.
12. At this stage you need to click ✓ to save.

Reopen the task and complete as per above.