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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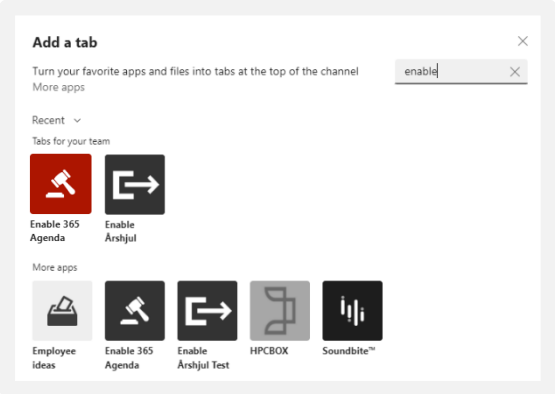
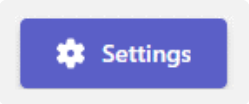
Getting started with Agenda in your Team

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:



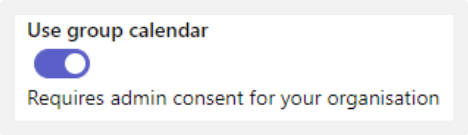
Settings for Agenda in your team



From "Settings" you can add regular participants, location for reports/minutes and agenda, and whether you are going to use Planner for tasks etc. The settings can be changed at any time and will then affect new meetings.

Group calendar

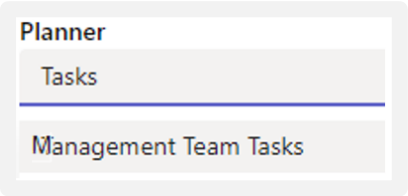
By selecting this, you will have the option to send a meeting invite to the participants when the meeting is being created.



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

Create Planner tasks from Agenda

To create Planner tasks during meetings, you must first specify which Plan your team's tasks belong to. The plan must be created in advance.

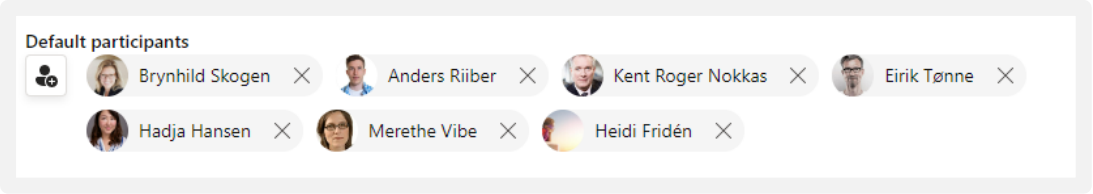


Regular meeting participants

Add the people who should automatically appear as 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.

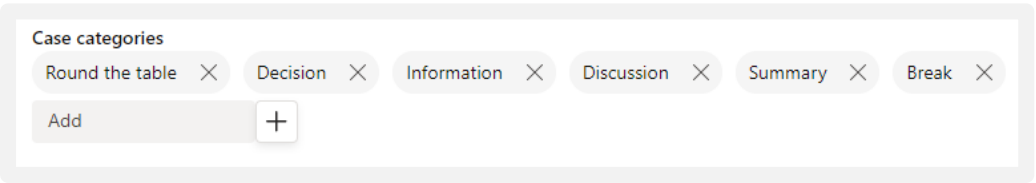
Do lookups by typing the name of the person you want to add.



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

Case categories/case types

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

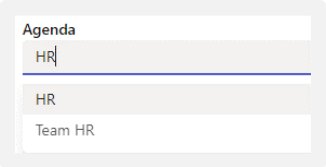


Tip! Create a category called "Break," and you will get that planned too.

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 to the "Agendas" library in your team's associated SharePoint site. If you would rather publish the agenda to some other place on the intranet, you can change this in the box "Agenda".

Type to search for the site where you want to publish the agenda, and then select the library you want to use.



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

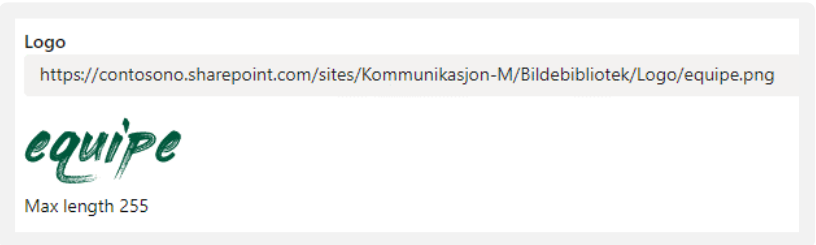
In Agenda it is possible to publish the report as a file in PDF format. By default, the file is saved to the "AgendaReports" library in your team's associated SharePoint site. If you rather would publish the reports somewhere on the intranet, you can change this in the box "Reports".

Type to search for the site you want publish the report, and then select the library you want to use.

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.

Add a logo for the agenda and report

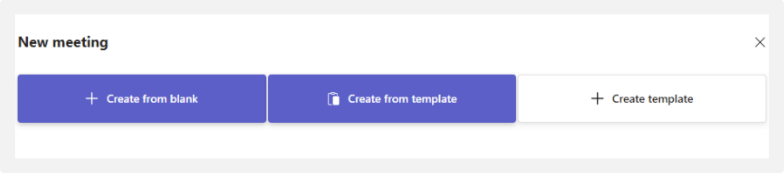
Paste a link to the logo you want to use *in the same format* as in the example below (a standard sharing link will not work).



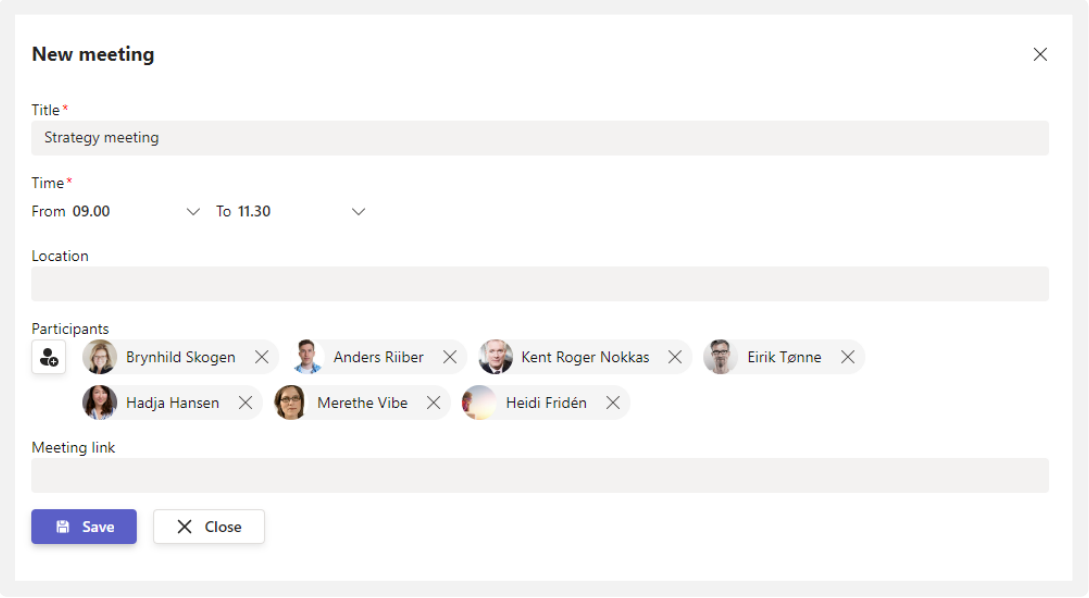
Create meeting templates for your regular meetings

Creating templates for your regular meetings can save you a lot of time. Cases, attendees, and case managers are all stored in the template, making it easy to create new meetings based on the template.

Start by selecting "Create meeting" and then "Create template."



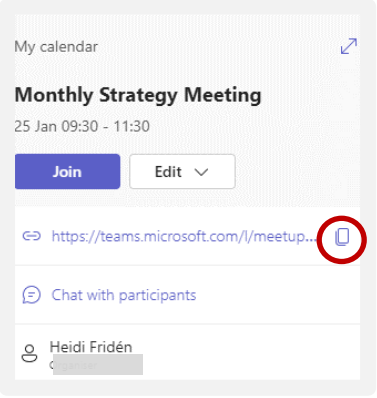
Fill in the meeting title, start and end time, location (if you have one), and participants.



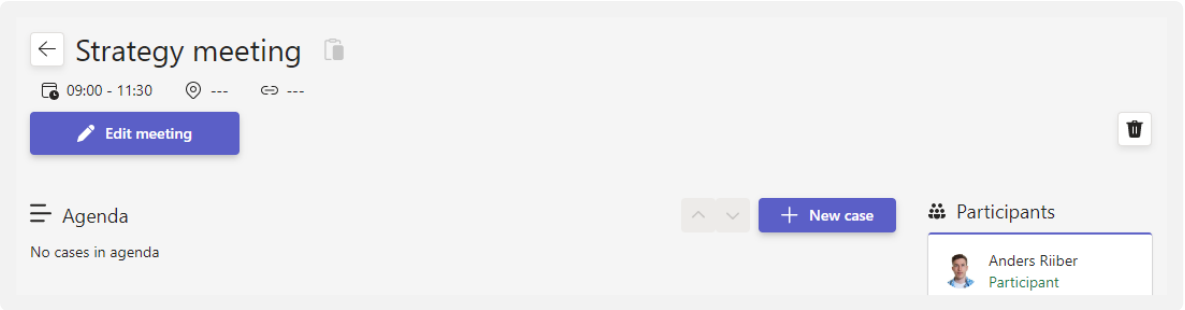
Today's date is filled in automatically but has no significance for the meeting template. New meetings created based on the template will have the current date proposed.

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 "Meeting link" field.

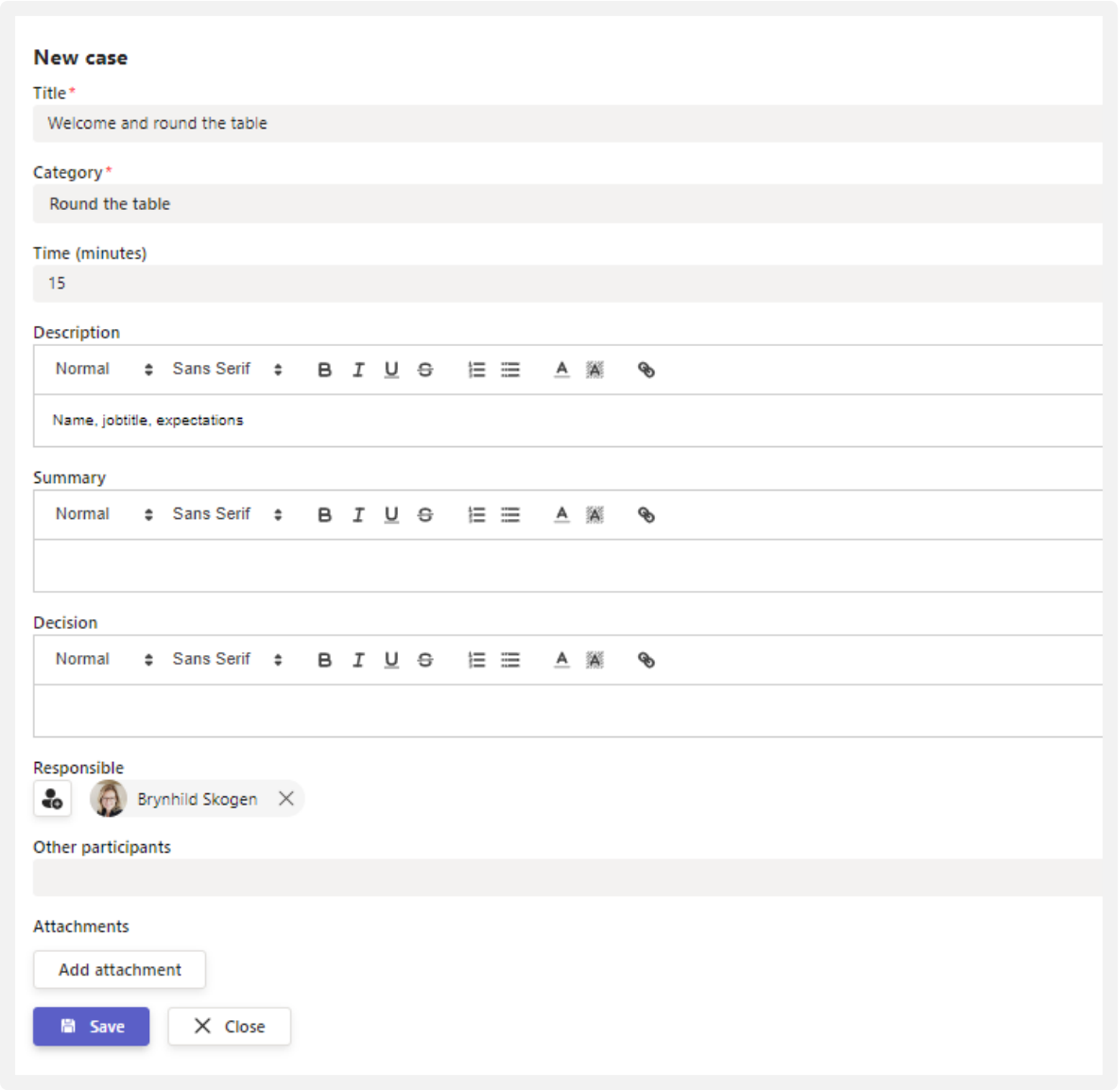


Add cases to the meeting template



New case

The only thing *you have to* fill in, is the title and category, but you may want to consider the other choices as well. See explanation of all the fields below the image.



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.

Responsible

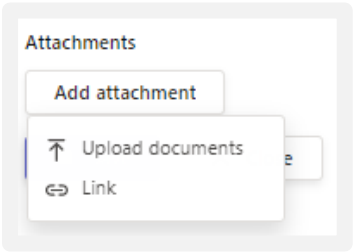
Enter the person responsible for the case.

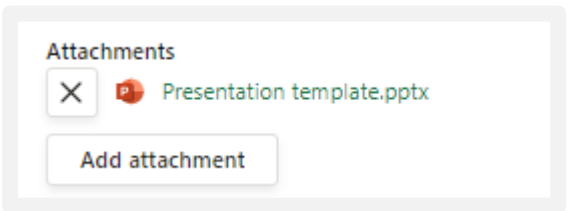
Other (guest) participants

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.

Supporting documents/attachments

You can choose between uploading (the file will be uploaded to the library “AgendaDocuments” on your team and only available to team members) or linking to an existing file, which can be in a location where there is reading access for everyone (Intranet).

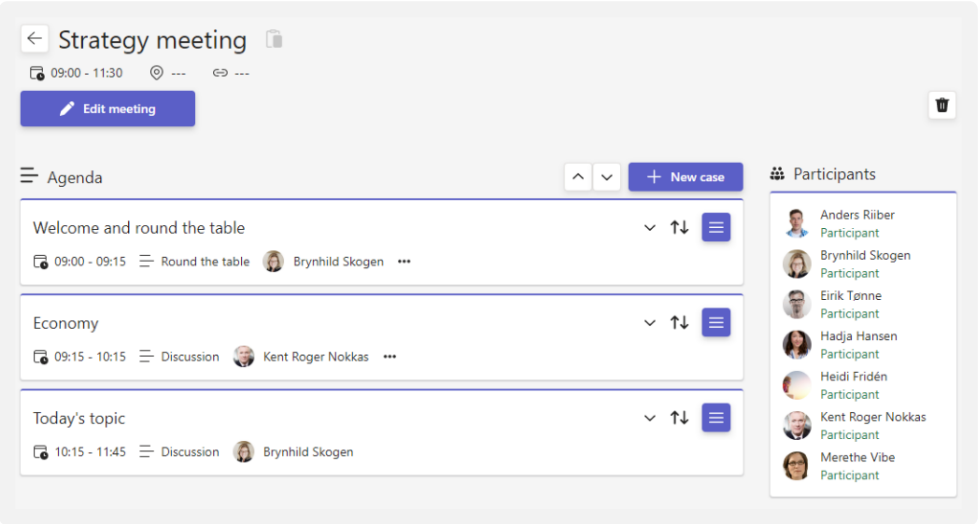




Case documents are entered and displayed per. case, but you will also find case documents collected for a meeting under "Attachments".

Example of a ready-made meeting template

The cases are presented as a list view, where everyone can see who is responsible and the type of case.



Edit a meeting template

Templates are located on Agenda's home page under «Templates».

Click the template you want to edit.

Edit the general information

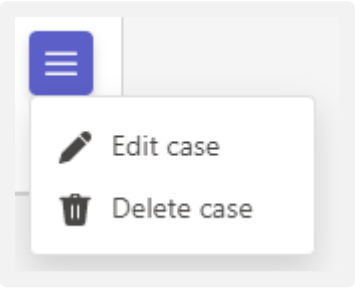
Click "Edit meeting" and make your changes.

Add a new case

Select "New case", then do the same as when you created the template.

Edit or delete a case

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



Note! Deleting a case will also delete the uploaded attachments connected to the case.

Change the case order

Grab this handle (up/down arrow) and drag the cases up or down.

Delete a meeting template

Click the Trash Can in the top right corner and confirm that you want to delete the template.

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