Business Solution ELO Meeting Premium

Business Solution ELO Meeting 1.00

Table of contents

Introduction

Structure of the documentation

The goal of this documentation is to explain all functions of Business Solution ELO Meeting Premium.

Basics

The Basics chapter explains the basics of the ELO Meeting Premium program interface.

Possible actions

The remaining chapters address possible actions using ELO Meeting Premium.

Target audience

This documentation is addressed to Business Solution ELO Meeting Premium users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

Roles

The documentation structure is based on the roles that are required in connection with meetings:

Role	Meaning
Board manager	The only task board managers have is to create meeting boards. Board managers are not authorized to perform other functions.
Board organizers	Board organizers are authorized for all functions within their board. However, they cannot create meeting boards.
Item submitters	Item submitters have access to all functions relating to items, e.g. *New item* and *Create proposal*. People who create and prepare items do not have to be members or guests of a meeting board.
Members and guests	Members are people who attend all meetings in this meeting board. Guests are additionally created for individual meetings. Members and guests are authorized to view the meeting and its contents. Depending on the setting, they may also be authorized to create items. Members and guests can participate in voting and be assigned tasks to work on.

Role	Meaning
Minute takers	Only minute takers and organizers are authorized to write minutes. Minutes takers are authorized to view the meeting and its contents even if they are not a member or guest. However, they are only granted this permission once the meeting starts.

Basics

Basic principle

Business Solution ELO Meeting Premium provides optimal support in planning, carrying out, and following up on meetings.

Departments can jointly prepare items for meetings. All relevant information and decisions are documented during the meeting, and minutes are created after the meeting.

A meeting board provides a framework for all meetings, which means that general information, such as members or recurring items, only needs to be entered once.

ELO Meeting Premium features an integrated app:

- The calendar function allows users to join meetings they are authorized to attend.
- The app maps the entire meeting process. The scope of functions differs depending on what your role is in a meeting. If you are the meeting organizer, you can plan meetings in the app, for example. Or if you are a member of a meeting board, you can view the agenda ahead of a meeting and take part in voting during meetings.

General note

ELO Meeting works with the following clients:

- ELO Web Client
- ELO Java Client

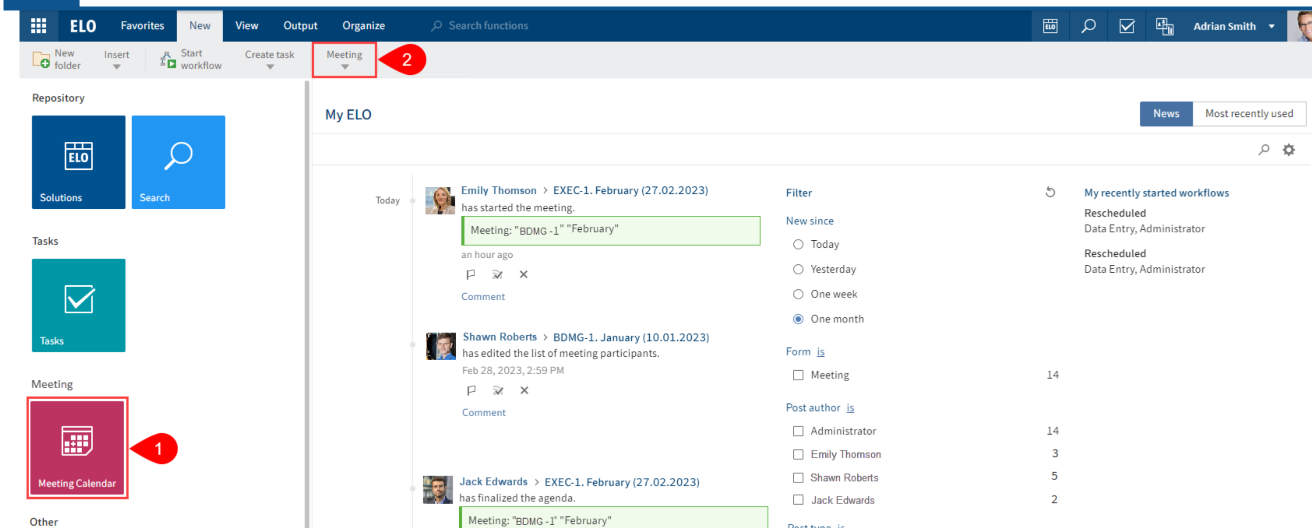
> **Information**
>
> In this documentation, we use screenshots from the ELO Web Client.

Requirements

Your administrator must have configured ELO Meeting Premium for you.

Program interface

You will find ELO Meeting Premium functions in the following areas:



1 'Meeting calendar' tile

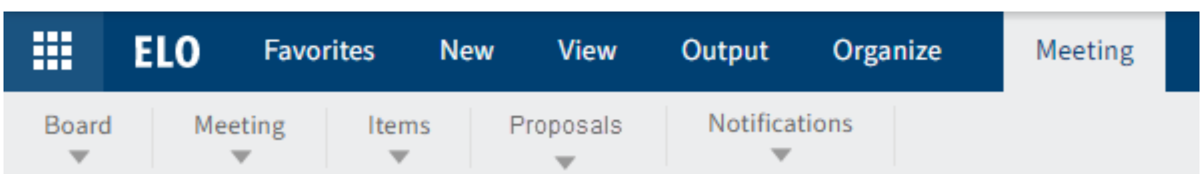
The meeting calendar gives you access to all meetings that you are authorized to attend.

2 'Meeting' group on the 'New' tab

You can use the functions in this group to create meeting boards, meetings, items and item pools.

> **Information**
>
> You can only create meeting boards and meetings if you have the corresponding permissions.

'Meeting' tab



As soon as you select a meeting board, this tab appears. You can use this tab to create and edit meetings, for example, and to create and register items to be raised for discussion.

> **Information**
>
> In most cases, you will only have access to some functions.

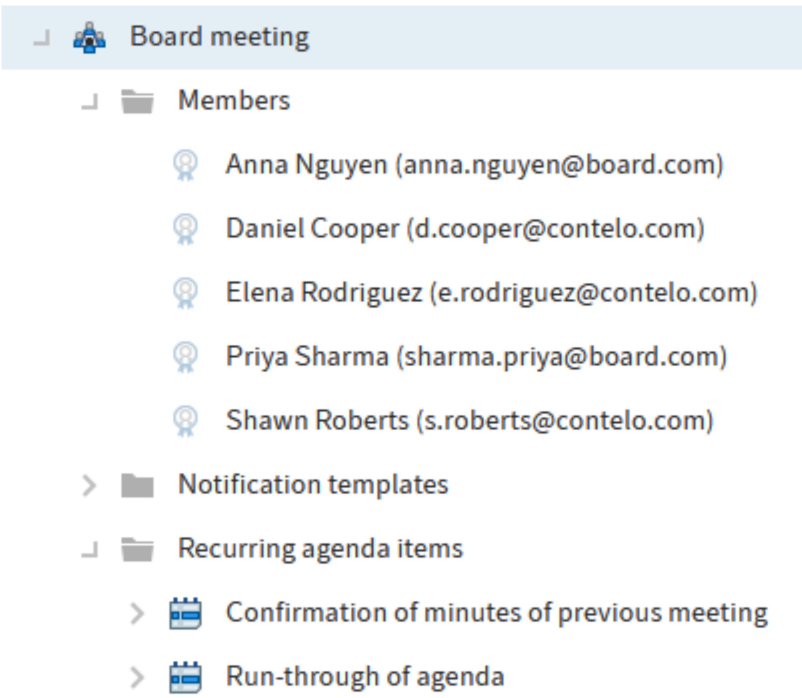
'Repository' work area

> **Information**

If you are authorized for a meeting board that is in a folder that you do not have permission to access, you will not be able to navigate to it from the *Repository* work area. In this case, you have the following options:

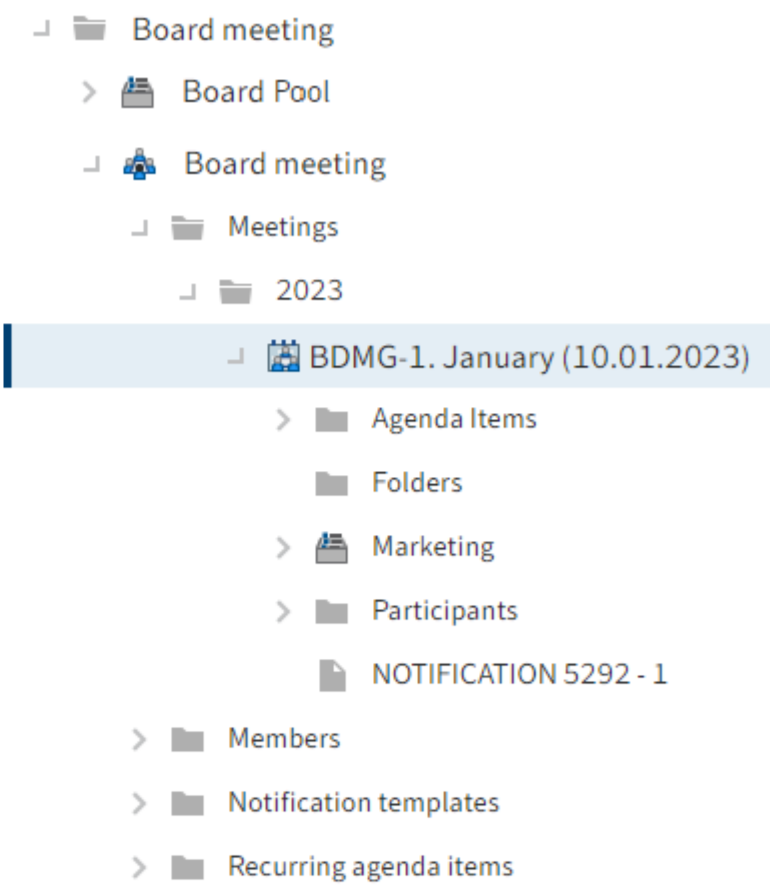
- Meeting calendar: You can see all your meetings in the calendar.
- Link: You will receive a link to the meeting.
- QR code: During the meeting, you will see a QR code that you can scan.
- Search: You can search for meeting boards and meetings in the *Search* work area.

The structure and appearance of the repository depend greatly on your specific configuration. The default settings are described here.



You can create meeting boards anywhere in the repository, but not within another meeting board.

The Elements of a meeting board chapter describes all elements in detail.



You will find the individual meetings within the meeting boards.

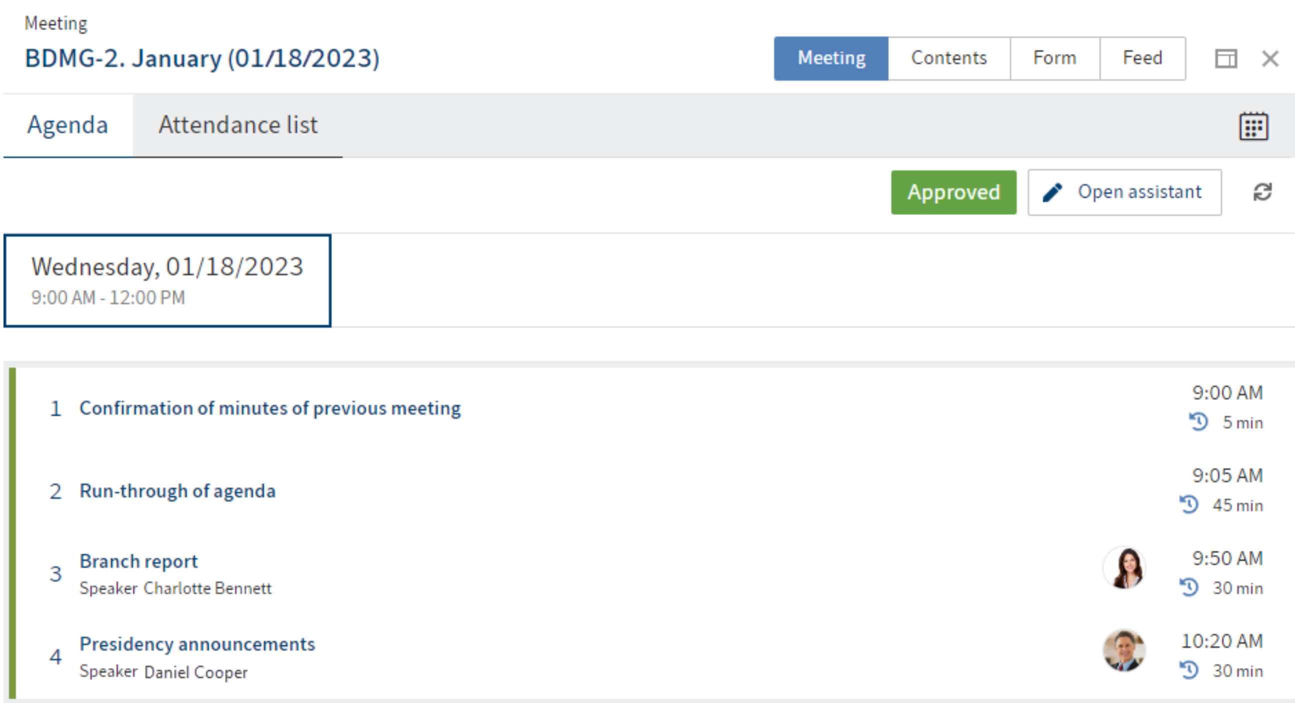
The Elements of a meeting chapter describes all elements in detail.

Meeting app

In the meeting app, you will find information about the meeting, such as the agenda with information about all items.

To find out how to access a meeting, refer to the ['Repository' work area] chapter.

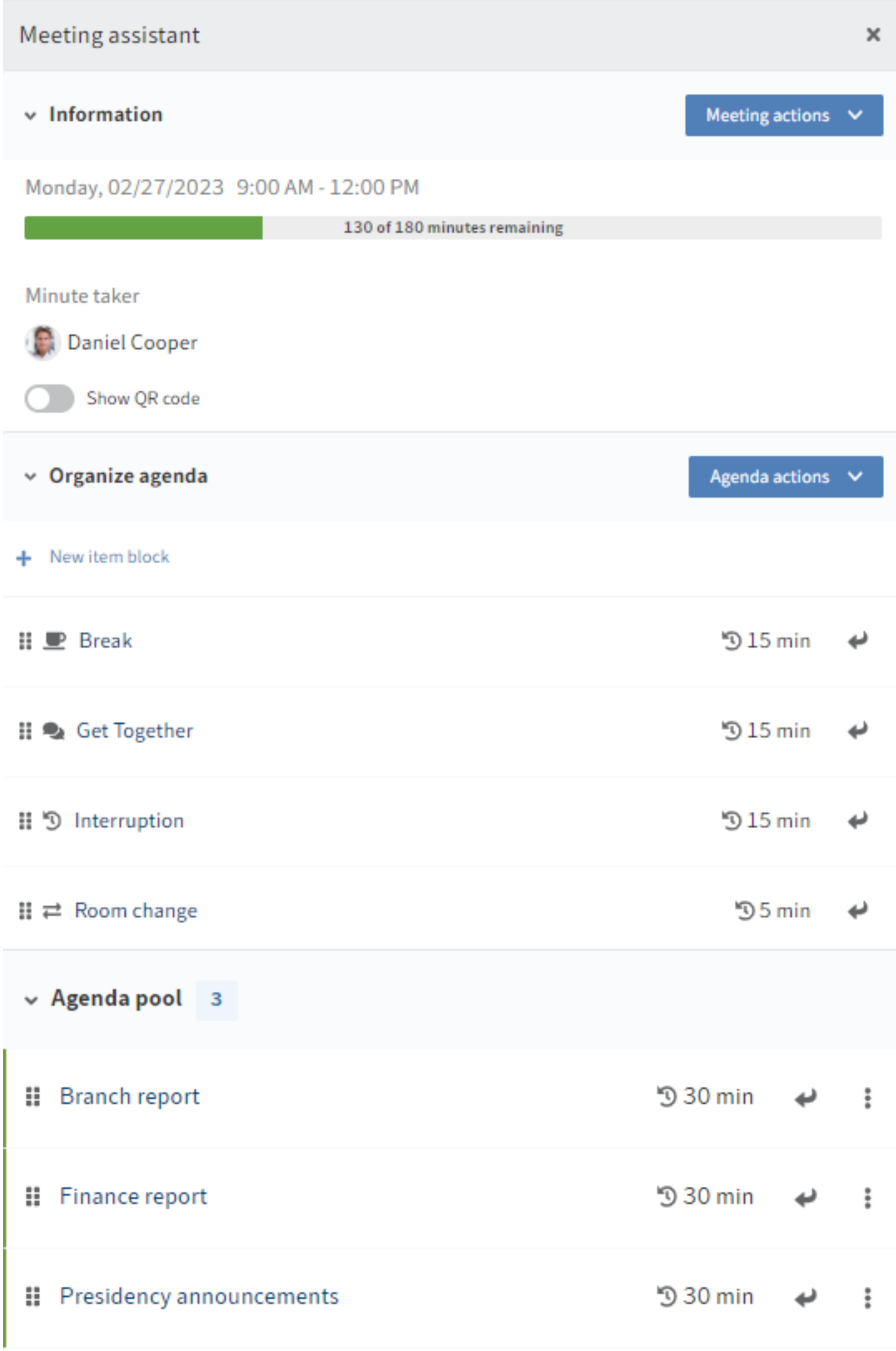
You can access the meeting app from the *Meeting* tab.



As a member of a meeting board, you use the meeting app to view agenda items and to take part in any votes.

For more information, refer to the Meeting app chapter.

If you have organizational rights, you can access the meeting assistant by clicking the *Open assistant* button.



You can prepare and conduct meetings in the meeting assistant.

For more information, refer to the Meeting assistant chapter.

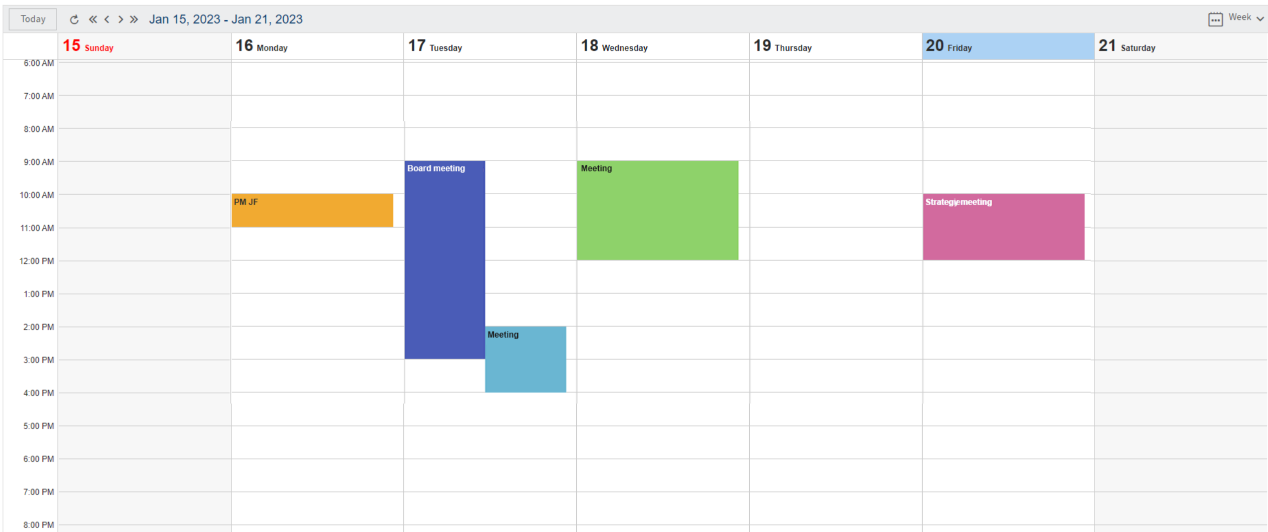
Calendar

The calendar provides an overview of your meetings.

There are two different calendars:

- Meeting calendar
- Meeting board calendar

Meeting calendar



The general meeting calendar shows all meetings that you are authorized to attend. It is not restricted to a specific meeting board.

You can access this calendar from your *My ELO* home screen > *Meeting calendar* tile.

Meeting board calendar

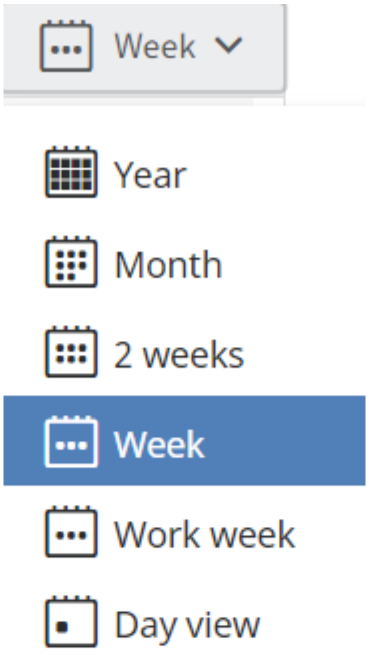
A meeting board calendar shows you all the meetings in the meeting board.

You can open this calendar in the following ways:

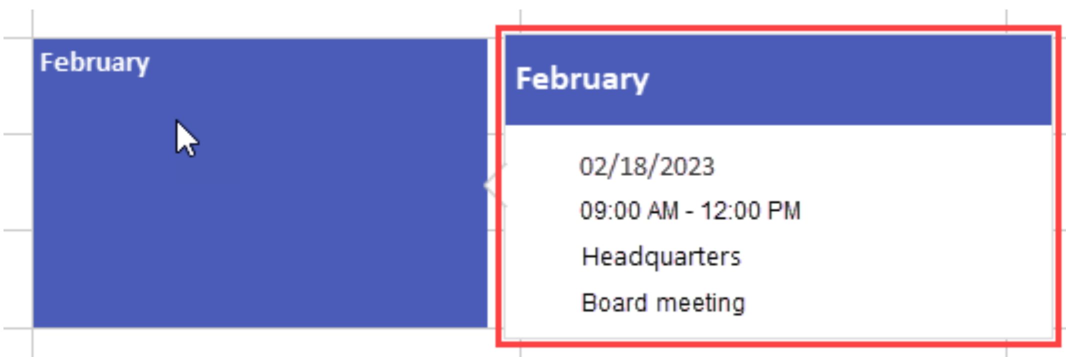
- Select a meeting board and then select the *Meeting board* tab.
- If you are in the app (*Meeting* tab), select the calendar icon.

Functions

You have the following options in the calendar:



You can switch the calendar view using the drop-down menu.



You can view important information about the meetings by moving the mouse over a meeting.

Jump to a meeting

Clicking on a meeting takes you to the meeting in the preview area. Double-clicking the meeting takes you to the meeting in the repository.

Meeting board

Introduction

A meeting board is an area in which all meetings held by a committee or other body are created.

When you create a meeting board, you enter information that is inherited by all meetings within this meeting board, such as members and recurring items.

> **Information**
>
> To avoid meeting boards being created unnecessarily, only a few people are authorized to create meeting boards.

Permissions

Meeting boards do not inherit the permissions of the folder that they are created in. This means that people can be authorized for a meeting board but not have permission to access the folder that the meeting board is stored in. Therefore, if you are a member of a meeting board and you do not have access to the folder containing the meeting board, you will not be able to access the meeting board from the *Repository* work area.

In this case, you have the following options:

- Meeting calendar: You can see all your meetings in the calendar.
- Search: You can access the meeting board using the search function.
- Link: You receive an e-mail with the link to the meeting board or meeting.

There is also the option to display a QR code during a meeting. This takes participants to the respective meeting and not to the meeting board.

The following list contains the permissions for a meeting board:

Board manager

- Only board managers are authorized to create meeting boards.
- Creating meeting boards is the only task that board managers have unless they are granted other permissions.

Organizer

- Organizers are selected by the board manager when they are creating a meeting board.
- It is possible to appoint multiple organizers for each meeting board.
- Meeting board organizers can select other organizers.
- There is only one function that is not available to organizers: New meeting board.

Member

-

Members are authorized to view a meeting board and access the meetings within the meeting board.

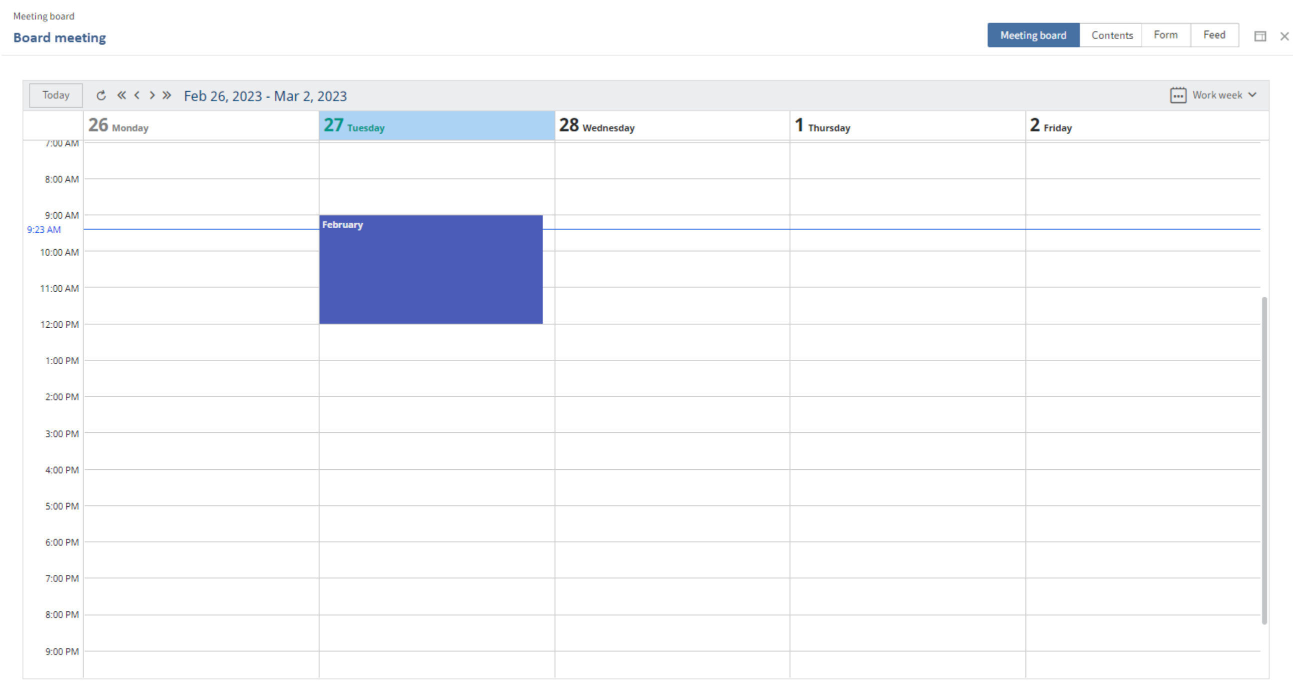
Minute taker

- You can only select one minute taker for each meeting board.
- It is possible to change the minute taker for individual meetings.
- Minute takers are authorized to write minutes.
- If a minute taker is not a member of the meeting board, they are not granted access to the meeting board. They are granted access once the meeting has started.

Elements of a meeting board

Each meeting board features a calendar (Meeting board tab), a form, contents, and a feed.

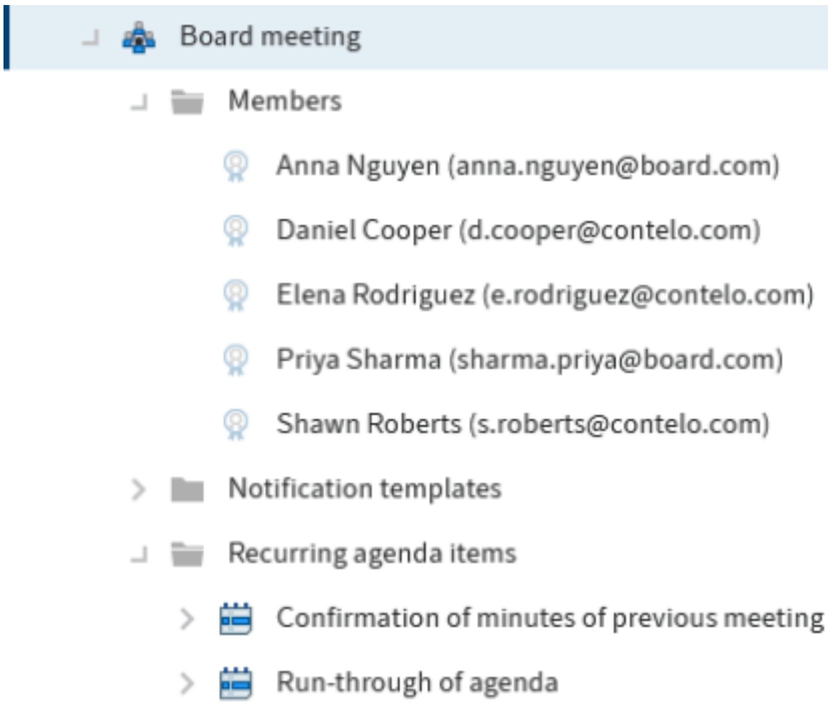
'Meeting board' tab



You will find the meeting board calendar on the *Meeting board* tab. This calendar displays all meetings within the meeting board.

For more information, refer to the Meeting board calendar chapter.

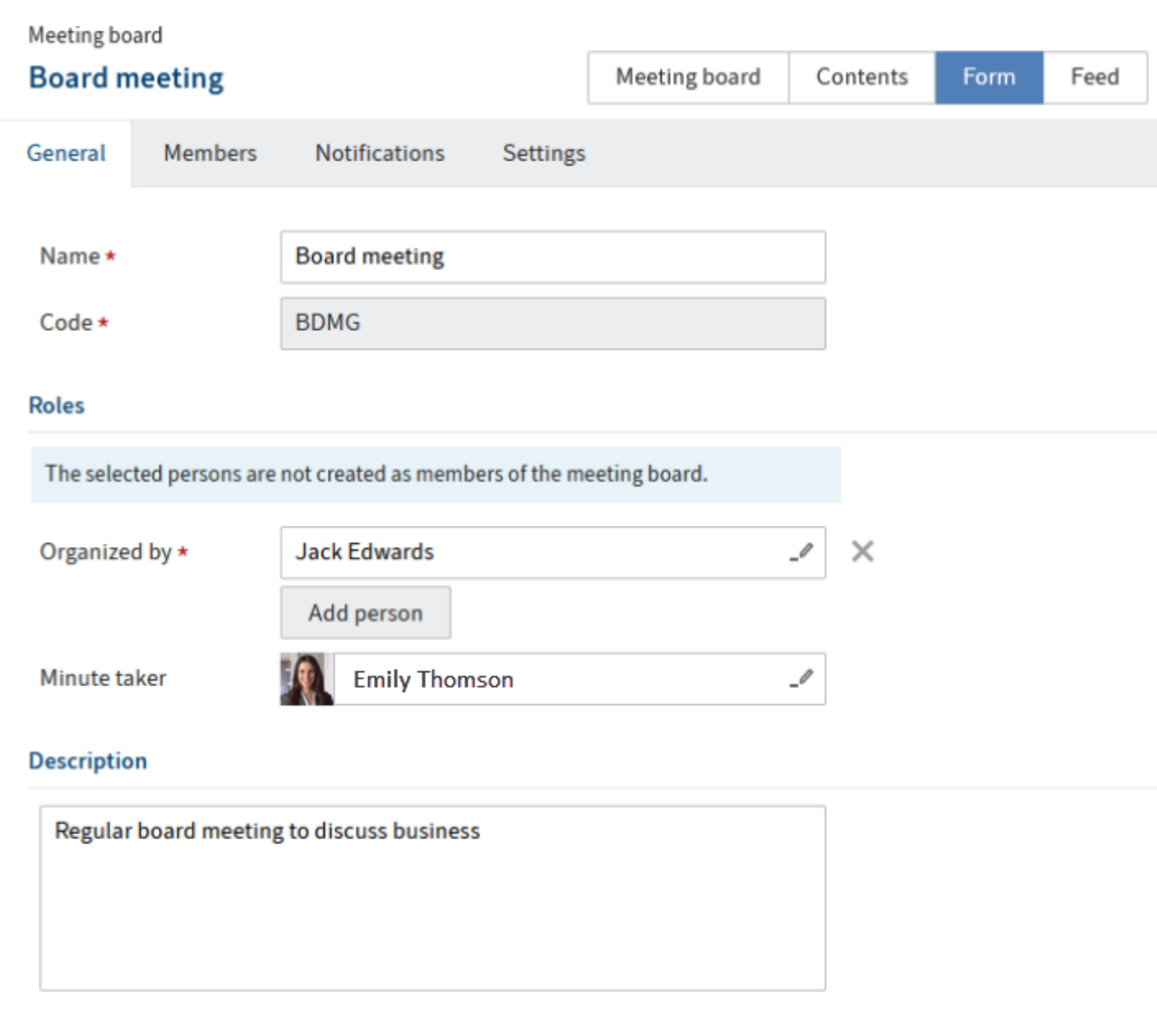
Contents



You will find the meeting board entries on the *Contents* tab and in the repository:

- Notification templates: All templates in this folder can be used for the entire meeting board or just for individual meetings within the meeting board. Refer to the Create notification template chapter to learn how to create notification templates. To find out how to use notification templates, refer to the Create meeting board chapter.
- Members: This folder contains all active and inactive members of the meeting board. They are automatically inherited by meetings within the meeting board but can be removed from individual meetings.
- Meetings: This folder contains all meetings in the meeting board. If the folder doesn't exist, no meetings have been created yet.
- Recurring items: Recurring items are automatically inherited by meetings in the meeting board.

Form



You will find the basic meeting board settings on the *Form* tab. It contains information such as the purpose of the meeting board in the *Description* field, or its members.

Feed

Refer to the client documentation for information about the feed:

- Web Client
- Java Client

Create meeting board

> **Information**
>
> This chapter is aimed at board managers. If you need a meeting board and do not have the necessary permissions, contact a board manager at your company.

A meeting board provides the framework for all meetings. You need to create a meeting board in order to be able to create meetings.

When you create a meeting board, you enter information that does not change during the meeting series, such as members and notifications. This information is inherited by all meetings within the meeting board and therefore only needs to be entered once.

Once a meeting board has been created, the organizers can edit it.

Requirements

- You are a board manager.
- You cannot create meeting boards with existing meeting boards, item pools, or items.

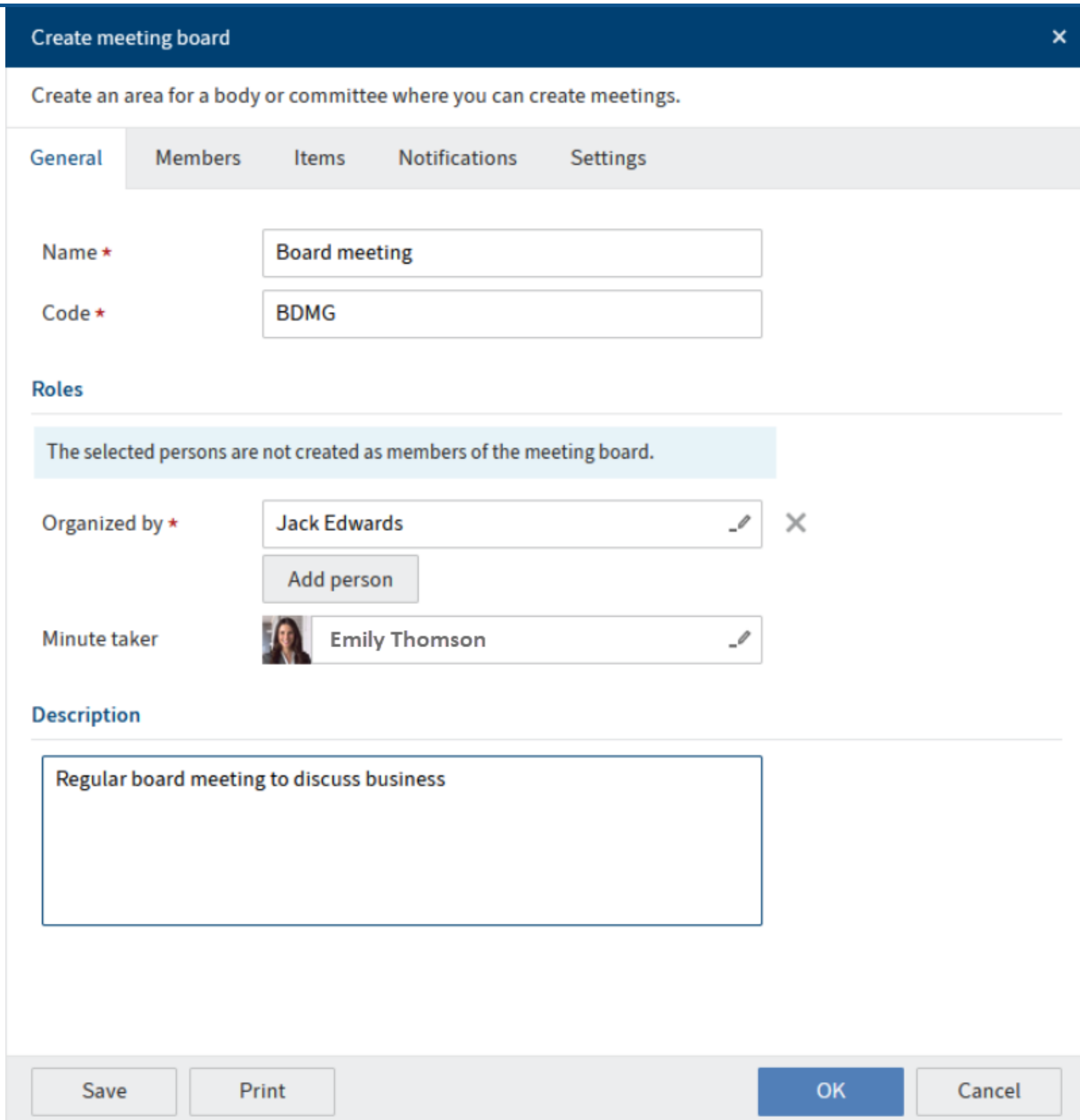
Method

1. In the *Repository* work area, select the folder you want to create the meeting board in.

2. On the ribbon, go to the *New* tab and select *Meeting* > *New meeting board*.

3. Complete the fields in the *Create meeting board* dialog box as required.

   'General' tab

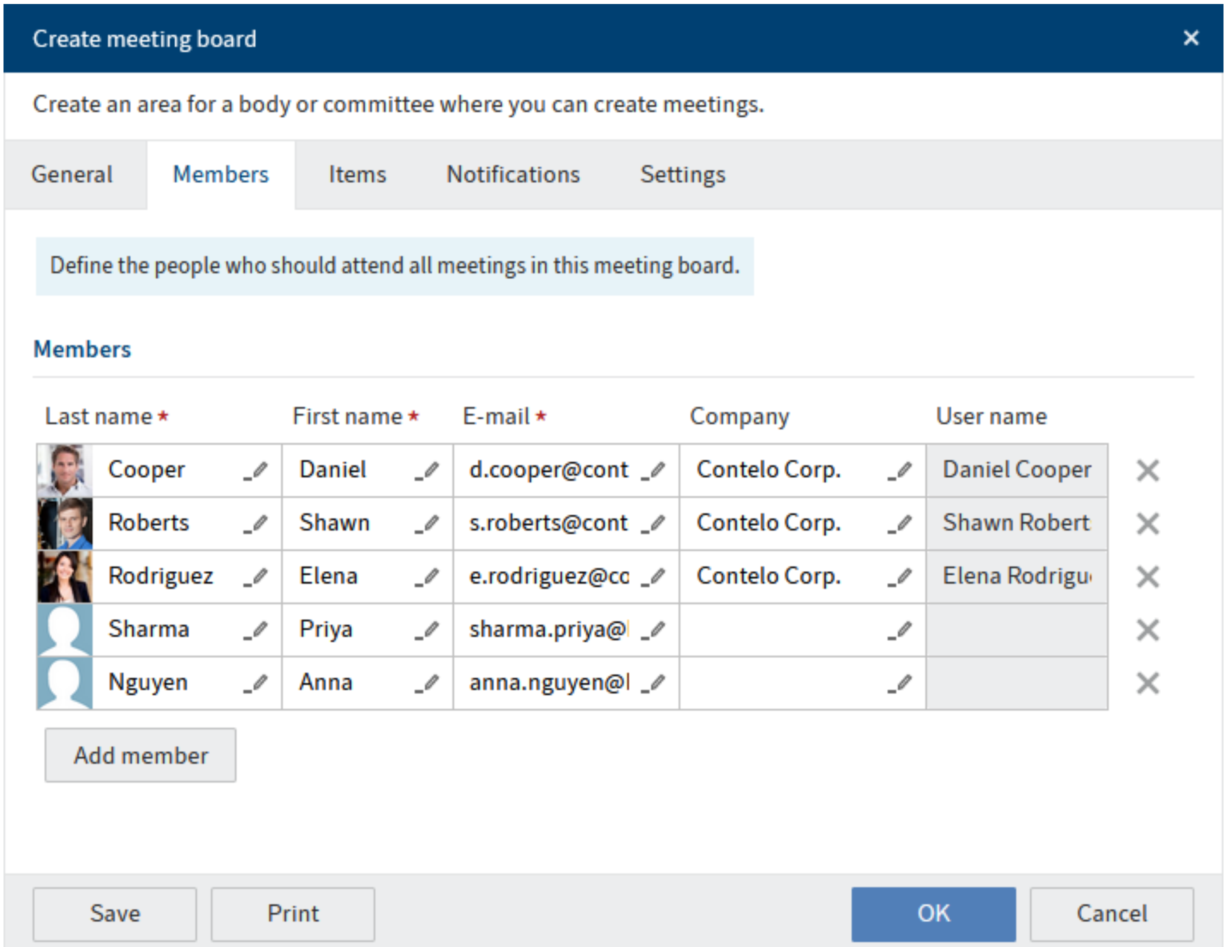


This tab already contains some general information about the meeting board.

Field	Explanation
Name	This is the name of the meeting board. It can be edited.
Code	This code is placed before the name of all meetings in the meeting board. It consists of two to five characters and must not contain special characters or letters with accent marks. The code cannot be changed.
Organizer	Each meeting board can have multiple organizers. You can only select someone who has been granted permission to organize meeting boards. If you also want these people to be members, you need to add them on the *Members* tab.

Field	Explanation
Minute taker	The user selected here is inherited by all meetings in the meeting board. It can be changed in the individual meetings. If you also want this person to be a member, you need to add them on the *Members* tab.

'Members' tab



On this tab, select the people who are expected to attend all meetings in the meeting board.

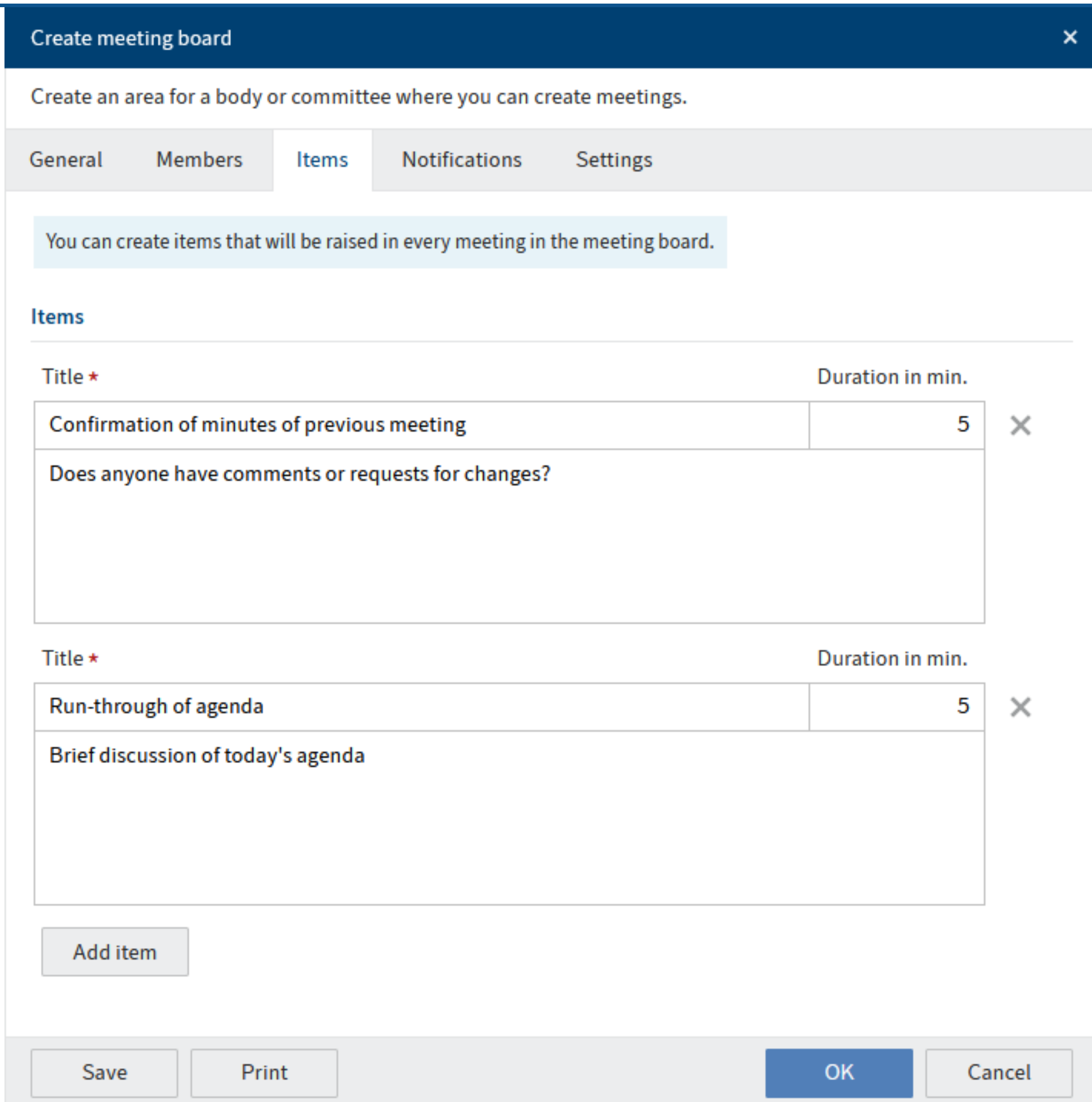
Members do not require an ELO account. You can either import contacts from ELO Contact or type in their data.

Additional members can be added later using the Add members function.

Information

Members cannot be deleted. This is to prevent any effects on meetings already held. When members step down or leave the company, the status can be set as Inactive.

'Items' tab



On this tab, you can create items that are discussed at every meeting. They are automatically placed on the agenda of every meeting, but can be removed if required.

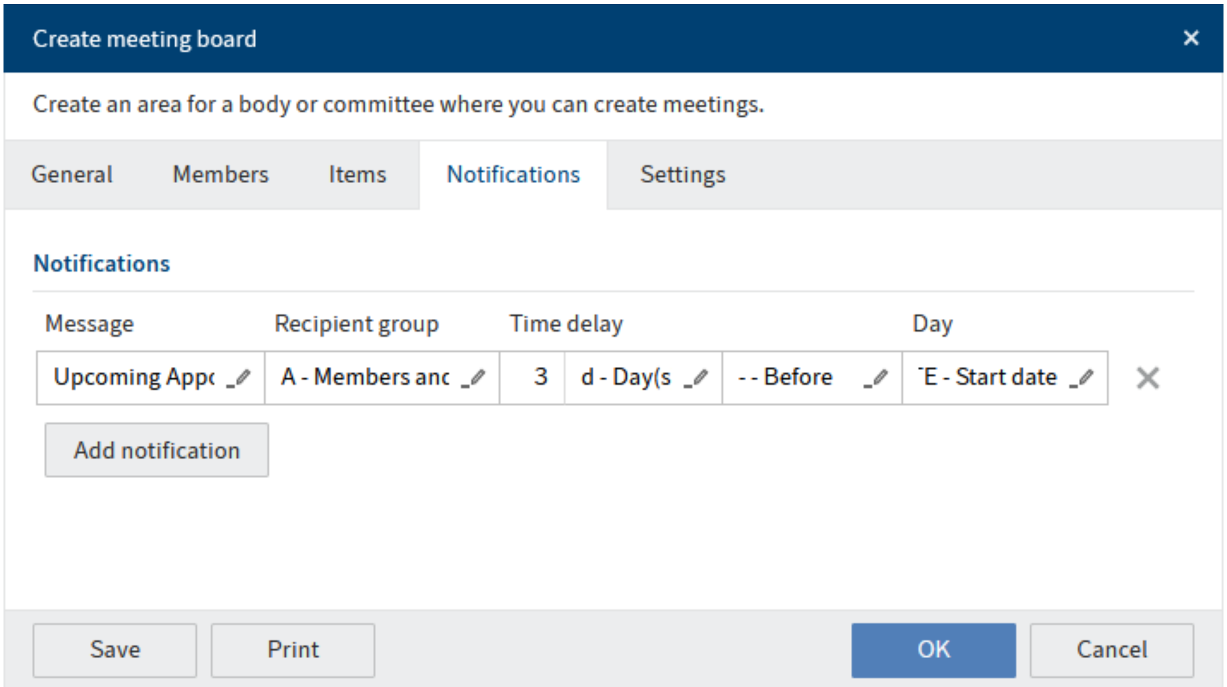
Field	Explanation
Duration in min.	The time you enter here is automatically stored for every meeting. However, you have the option to change the time allotted in the settings of a meeting.

You can add recurring items later using the New recurring item function.

Information

Organizers can add information about items in the corresponding form.

'Notifications' tab



On this tab, you can select messages that will be sent to the selected recipient group before or after each meeting.

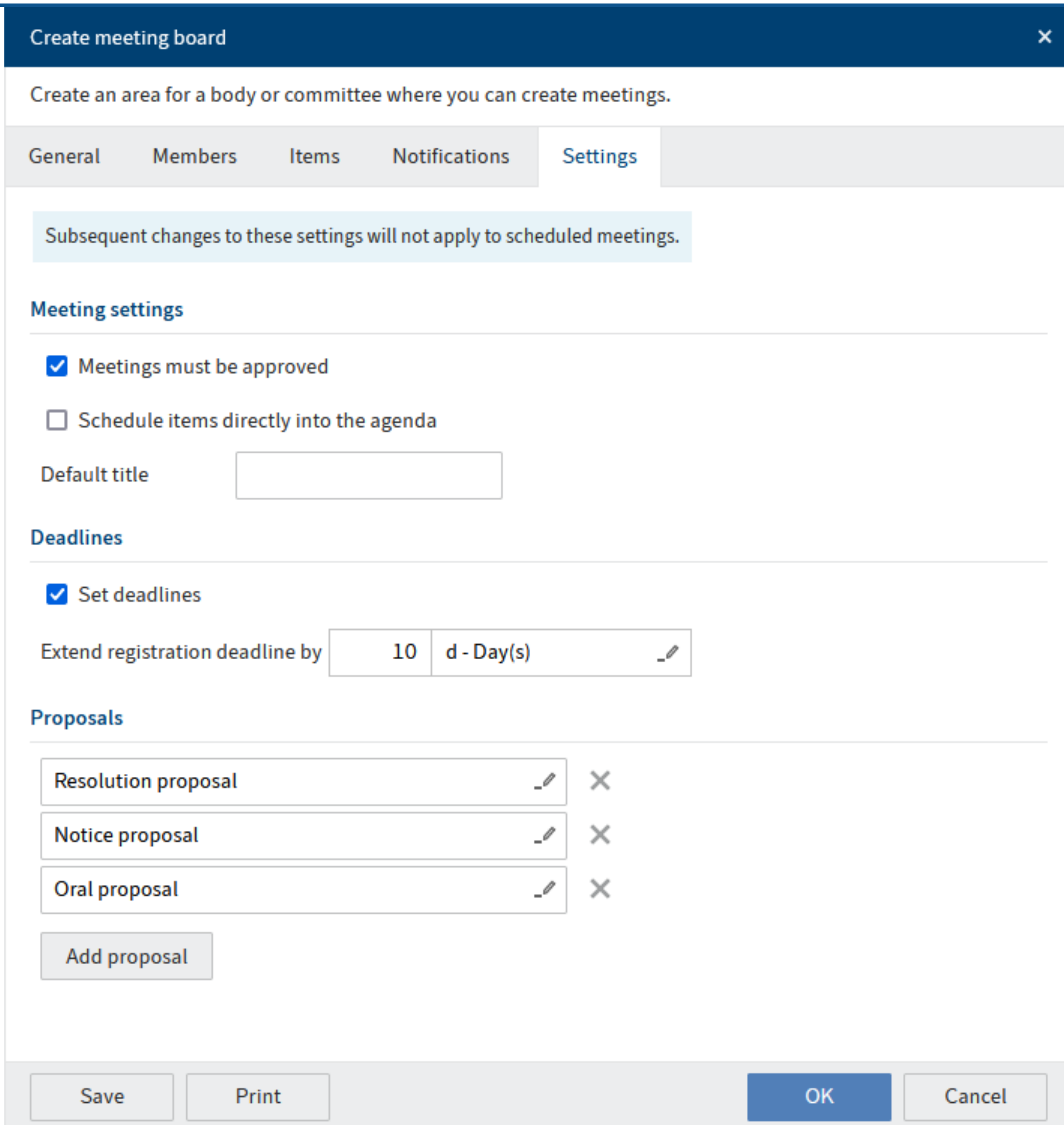
For example, if you want to remind members to submit their items on time, you could enter something like this:

Message	**Recipient group**	**Time delay**		**Day**
End of registration deadline	M - All members	3 d - day(s)	--Before	Registration deadline

With this information, the recipients would get an e-mail reminder three days before the end of the registration deadline. For this to work, an administrator must have created the global template *End of registration deadline*.

You can create your own notification templates specifically for the meeting board later.

'Settings' tab



On this tab, you can make additional settings for the meeting board.

Meeting settings:

Field	Explanation
Meetings must be approved	If you select this option, meetings always have to be approved using the Approve meetings function. This enables you to set up tentative meetings. Once they have been approved, you can start planning them.
Schedule items directly into the agenda	If you select this option, when you create an item in a meeting, you can directly place the item at the end of the agenda. Otherwise, it is placed in the agenda pool and has to be moved to the agenda manually.

Field	Explanation
Default title	If you enter a default title, all meetings within the meeting board are automatically given this name.

Deadlines:

Field	Explanation
Set deadlines	This option enables users to set deadlines.
Registration deadline	The registration deadline specifies the deadline for submitting items to meetings. When you are creating a meeting, this deadline can be accepted or changed.

Proposals:

The proposals you select here are available for items that are created for the meeting board. Proposals must have been created by an administrator beforehand.

4. Select *OK*.

Result

The meeting board is created in the selected folder. It can now be used by the committee or body it was created for.

The meeting board contains the *Notification templates*, *Members*, and *Recurring items* folders.

Outlook

After you have created the meeting board, it can be edited and used by the organizers.

You can make any changes to the meeting board in the form. For more information, refer to the Edit basic meeting board settings chapter.

Edit meeting board

Information

This chapter is aimed at meeting board organizers.

You can make changes to the meeting board. Changes to the meeting board only affect meetings that did not exist the time of the change.

You should therefore follow these steps before you create the first meeting in the meeting board:

Task	Explanation
Check and/or edit the basic settings in the meeting board form	Any missing or incorrect information should be added or corrected so that it is not inherited by the meetings.
Check recurring items	Check the *Recurring items* folder to make sure that it contains all the required items. Create additional recurring items if you need to.
Edit recurring items	When you create the meeting board, you will not be asked to enter all data about items. You can add this information in the form.
Create notification templates	If you want to use additional notification templates for all meetings in the meeting board, create them at the start. If you want to use additional notification templates for individual meetings only, you can create them later.

You can make the following changes to the meeting board:

Task	Explanation
Add members	When new members join a committee or other body, you can create them afterwards.
Set members as inactive	Members cannot be deleted. This is to prevent any effects on meetings already held. If a member steps down from a committee or board, you can change their status to *Inactive* to ensure that they will not appear as attendees at future meetings.
Create recurring items	If you have topics that you want to raise at every meeting, you can create recurring items.

Edit basic meeting board settings

You can edit some meeting board settings retroactively.

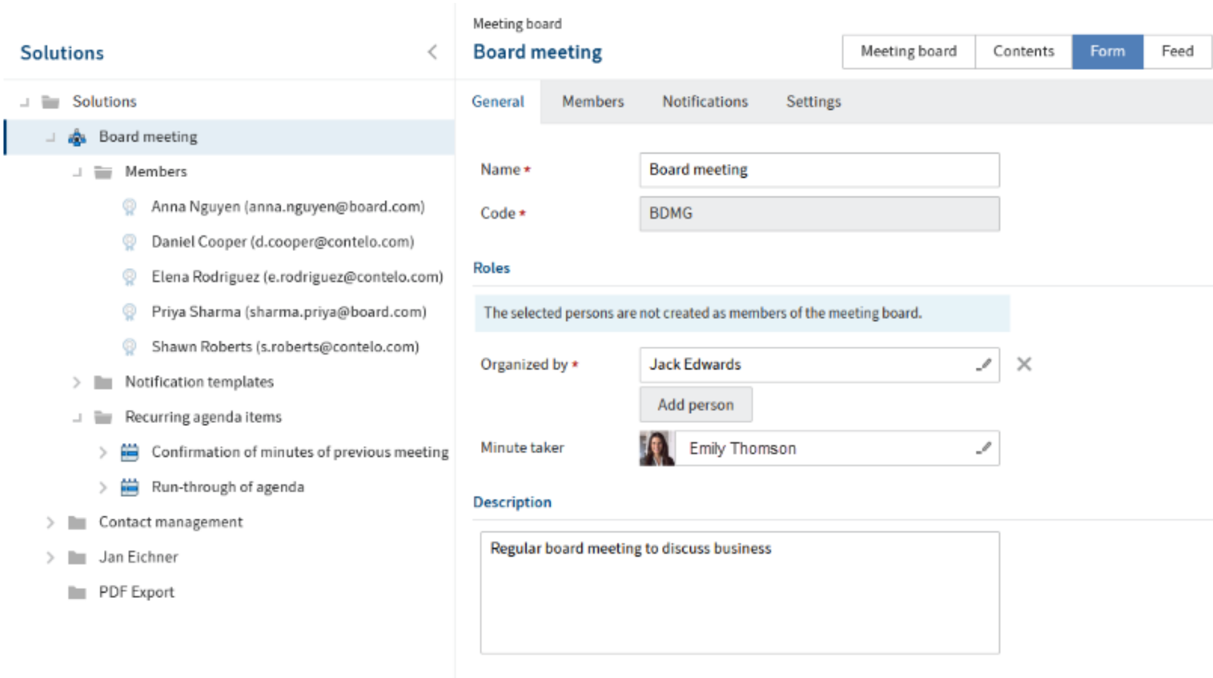
Information

Changes to the meeting board only affect meetings that did not exist at the time of the change.

Method

1. Select the meeting board.

2. Select the *Form* tab.



Refer to the Create meeting board chapter for details of the settings that you can make.

> **Information**
>
> Fields that are grayed out cannot be edited.

You cannot use the form to add members. In this case, you need to use the Add members function.

You cannot delete members. However, you can change their status to *I - Inactive*. For more information, refer to the Set member as inactive chapter.

If you want to send notifications but the corresponding template is not yet available, you first need to create a notification template.

3. Select *Save*.

Result

The changes are applied to the meeting board. They do not affect existing meetings.

When you create additional meetings for the meeting board, they have the new settings.

Create notification template

You can create notification templates for a meeting board. These can be used for the entire meeting board or just for individual meetings, but not for other meeting boards.

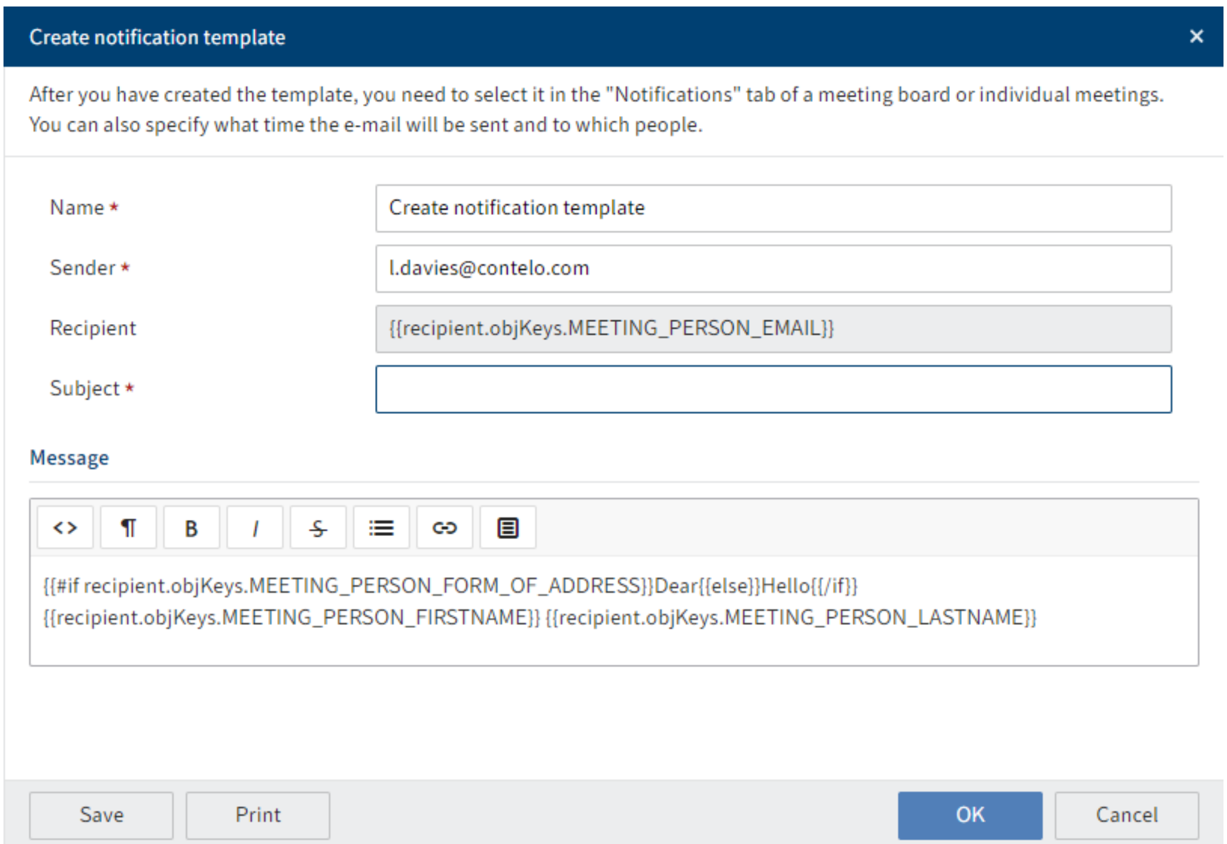
The notifications are sent by e-mail.

Alternative

You can also contact the participants of individual meetings in the meeting board using the Send message function. There are no templates for this.

Method

1. Select the meeting board.
2. On the ribbon, select *Meeting > Notifications > Create notification template*.



3. Complete the fields in the *Create notification template* dialog box as required.

Field	Explanation
Name	Notification templates are selected based on their name. You should therefore enter a name that indicates what the content is.
Sender	You need to enter the sender's e-mail address here.

Field	Explanation
Recipient	You cannot edit this field. You select the recipient group when you select the template for a meeting board or meeting.
Message	The title or form of address is already entered. You can type and format a message. You have the option to use clips to help you write text. They contain information about the respective meeting (e.g. location) and can be inserted into the text. To use clips, select the position in the text where you want to insert information and click *Clips*.

4. Select *OK*.

Result

The notification template is created in the *Notification templates* folder of the meeting board. It is now available for use in the meeting board.

Outlook

- You can use the notification template for the entire meeting board. Select the meeting board > *Form* tab > *Notifications* tab. Refer to the Create meeting board chapter for details of the settings.
- You can also use the notification template for individual meetings in the meeting board. Select the meeting > *Form* tab > *Notifications* tab.

The notification will be sent by e-mail to the selected recipient group at the designated time.

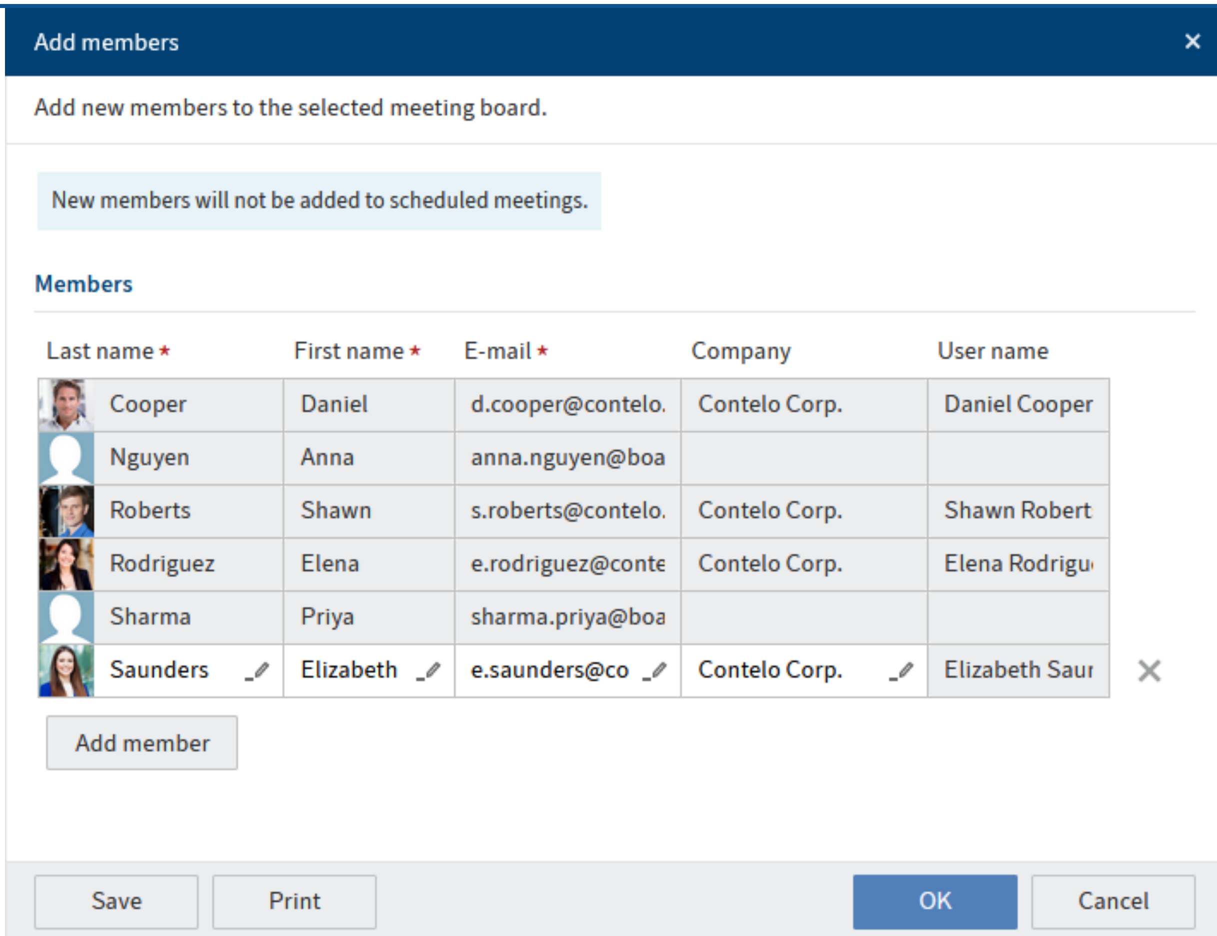
Add members

You can add members to a meeting board.

> **Information**
>
> If you only want to add guests to individual meetings, use the Edit list of participants function.

Method

1. Select the meeting board you want to add members to.
2. On the ribbon, select *Meeting > Board > Add members*.



3. Add members as required.

   Members do not require an ELO account. You can either import contacts from ELO Contact or type in their data.

   > **Information**
   >
   > Members cannot be deleted. This is to prevent any effects on meetings already held. When members step down or leave the company, the status can be set as *Inactive*.

4. Select *OK*.

Result

The members are added to the meeting board. The change does not affect existing meetings.

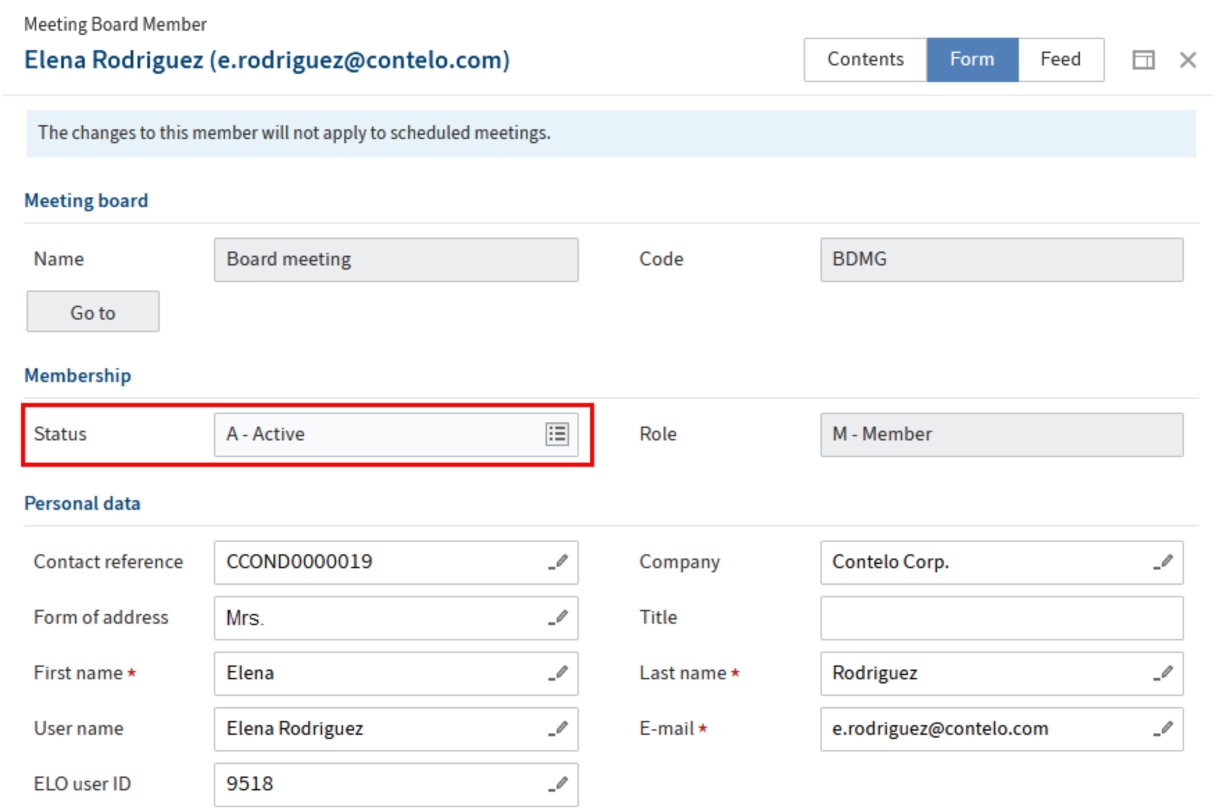
When you create additional meetings for the meeting board, newly created members are added to the list of participants.

Set member as inactive

Members cannot be deleted. This is to prevent any effects on meetings already held. When members step down or leave the company, you can set their status as *Inactive*.

Method

1. Select the meeting board.
2. Select the *Members* tab in the form.
3. Select *Go to* for the departing member.



4. Change the status to *I - Inactive*.
5. Select *Save*.

Result

The member is now inactive.

When you create additional meetings for the meeting board, the member no longer appears in the list of participants.

Information

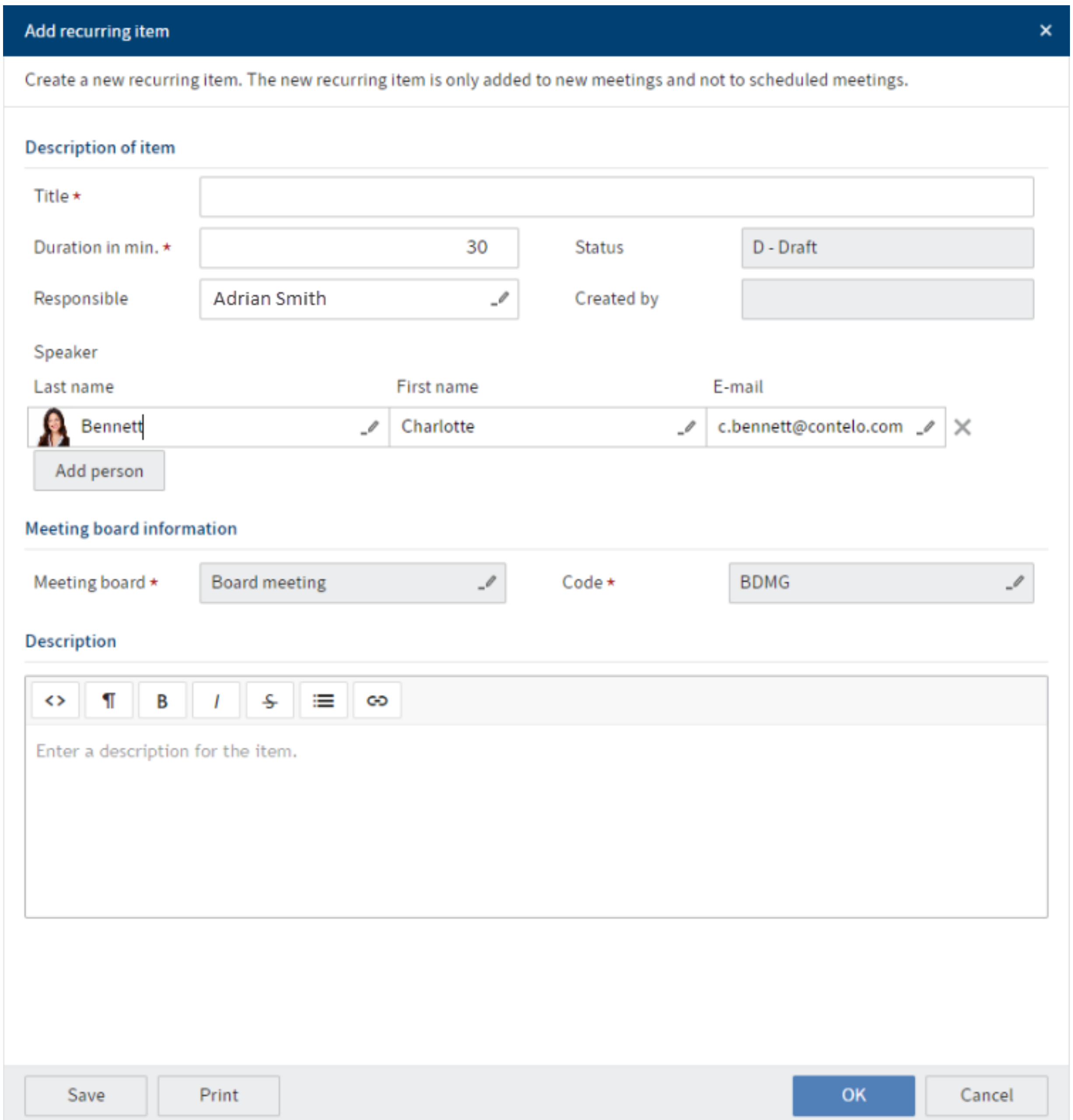
If you have already created meetings with the inactive member, you can remove them from each meeting using the Edit list of participants function.

Create recurring item

You can add recurring items to a meeting board.

Method

1. Select the meeting board.
2. On the ribbon, select *Meeting > Board > New recurring item*.



3.

Complete the fields in the *Add recurring item* dialog box as required.

Field	Explanation
Responsible	The person responsible is granted advanced permissions and can edit the item.
Speaker	The speakers are granted advanced permissions and can edit the item. You can select multiple people.

4. Select *OK*.

Result

The item is stored in the *Recurring items* folder.

When you create additional meetings for the meeting board, the item appears on the agenda.

Edit recurring items

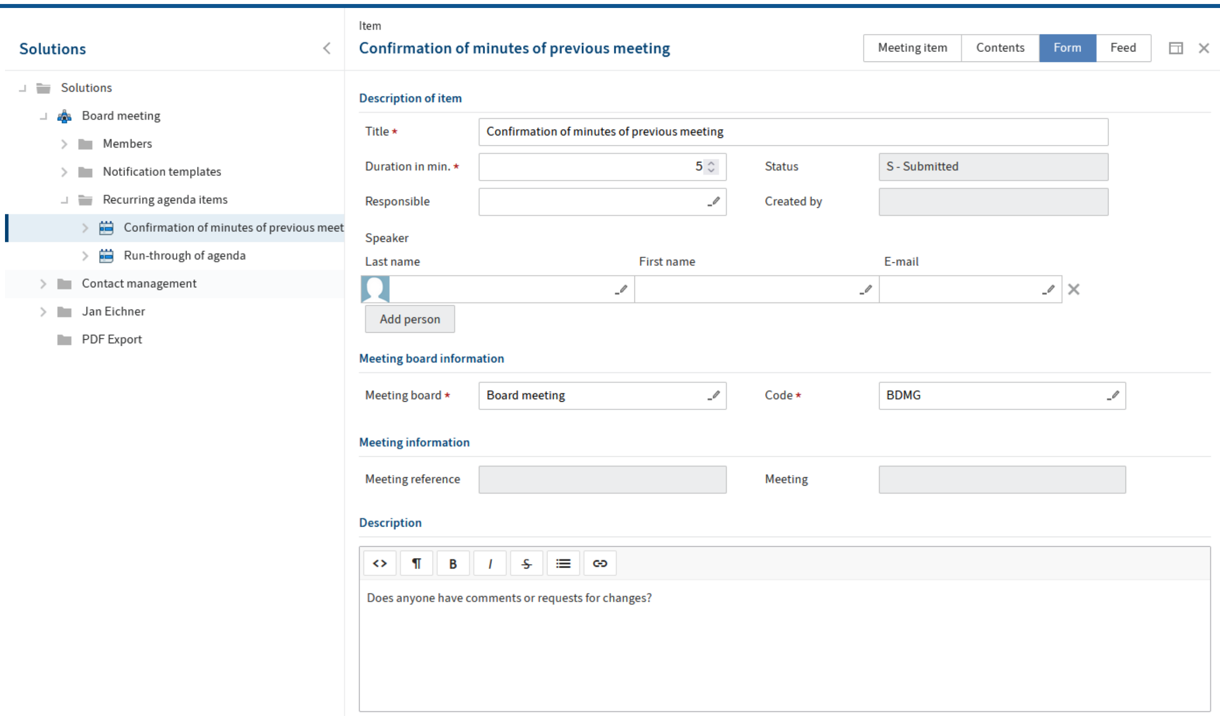
When you create a meeting board, you can only enter the title, duration, and a description of a recurring item. If the same people are going to prepare and present the item in every meeting, you can store this information globally for the meeting board.

Information

You can also upload documents that are needed in every meeting to the folder of the recurring item. In this case, you can use either the standard functions or the item detail page (*Recurring items* folder > Select item > *Meeting item* tab).

Method

1. Select the meeting board.
2. Select the form.



3. Edit the fields.

Field	**Explanation**
Responsible	The person responsible is granted advanced permissions and can edit the item.
Speaker	The speakers are granted advanced permissions and can edit the item. You can select multiple people.

4. Select *Save*.

Result

When you create additional meetings for the meeting board, the item appears on the agenda with the new information.

Meeting board calendar

Every meeting board has its own calendar. The calendar displays all meetings that you are authorized to attend within the meeting board.

For more information, refer to the Calendar chapter.

Meetings

Introduction

Each meeting is part of a meeting board. Without a meeting board, therefore, you cannot create meetings.

You see the meetings that you are authorized to attend. The functions that are available to you in a meeting depend on your role in that meeting.

Permissions

Since most meeting permissions are based on the permissions of a meeting board, they correspond to the meeting board permissions. For more information, refer to the Permissions chapter in the section on meeting boards.

You can also add guests to individual meetings.

Guest

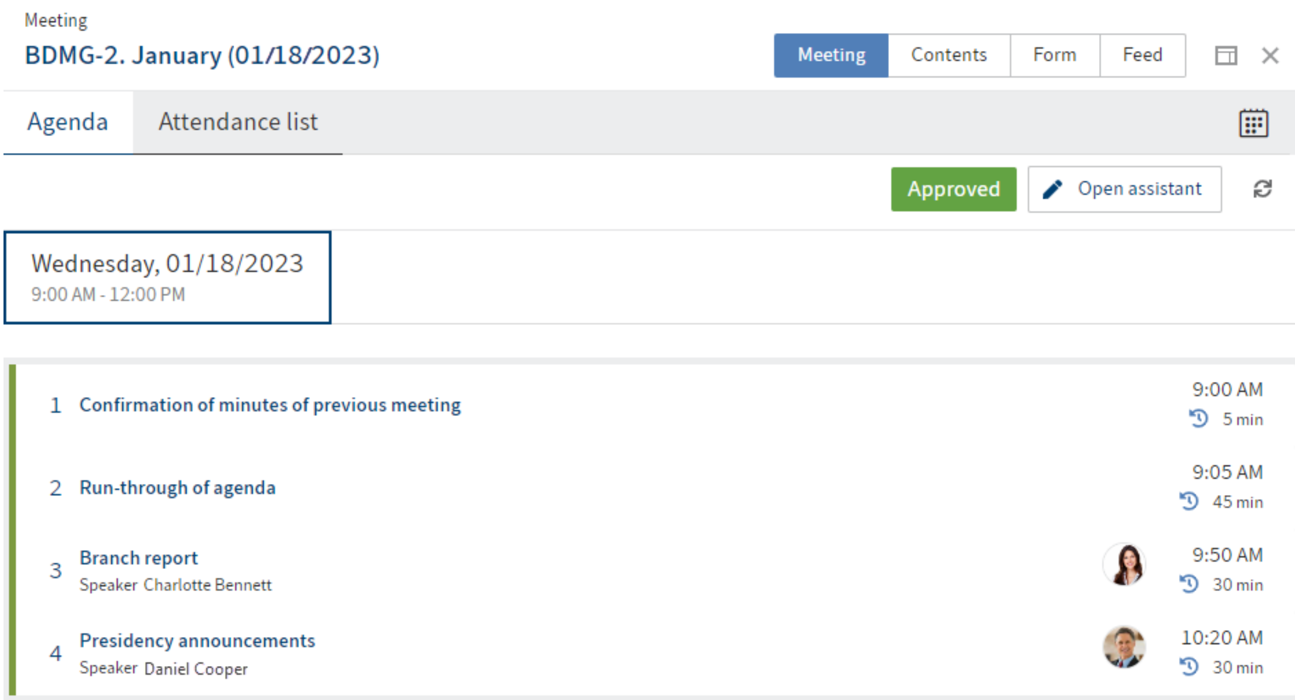
- Guests are authorized to access individual meetings within the meeting board.
- Since guests do not have meeting board permissions, they cannot navigate to the meeting from the *Repository* work area.

Elements of a meeting

Each meeting has a meeting app ('Meeting' tab), a form, contents, and a feed.

> **Information**
>
> If you have been given a direct link to the standalone app, you go straight to the meeting app and you will not see the other elements.

'Meeting' tab



You will find the meeting app in the *Meeting* tab. In the meeting app, you can see the scheduled agenda and select the individual items, for example. The meeting app is the main tool for conducting a meeting.

For more information, refer to the Meeting app chapter.

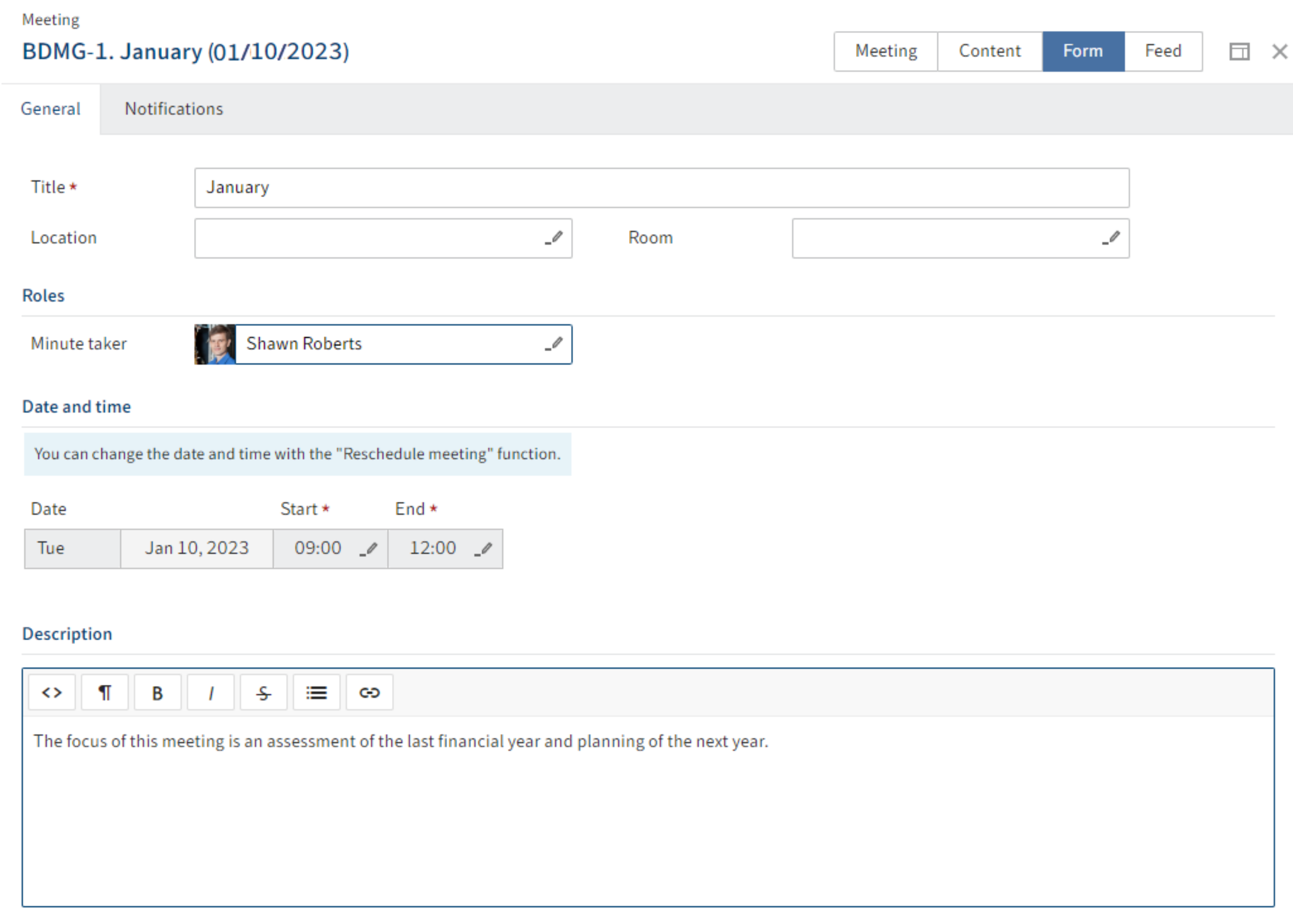
Organizers access the meeting assistant via the meeting app.

Contents

You will find the meeting board entries on the *Contents* tab and in the repository:

- Files: This folder is generated when a meeting file is created.
- Minutes: This folder is generated when minutes are created.
- Items: This folder automatically contains all recurring items. It also contains registered and submitted items.
- Participants: This folder contains all members and guests who have been registered for the meeting.

Form



You will find the meeting settings on the *Form* tab. It contains information such as the purpose of the meeting board in the *Description* field, or the location and exact time.

Feed

Refer to the client documentation for information about the feed:

- Web Client
- Java Client

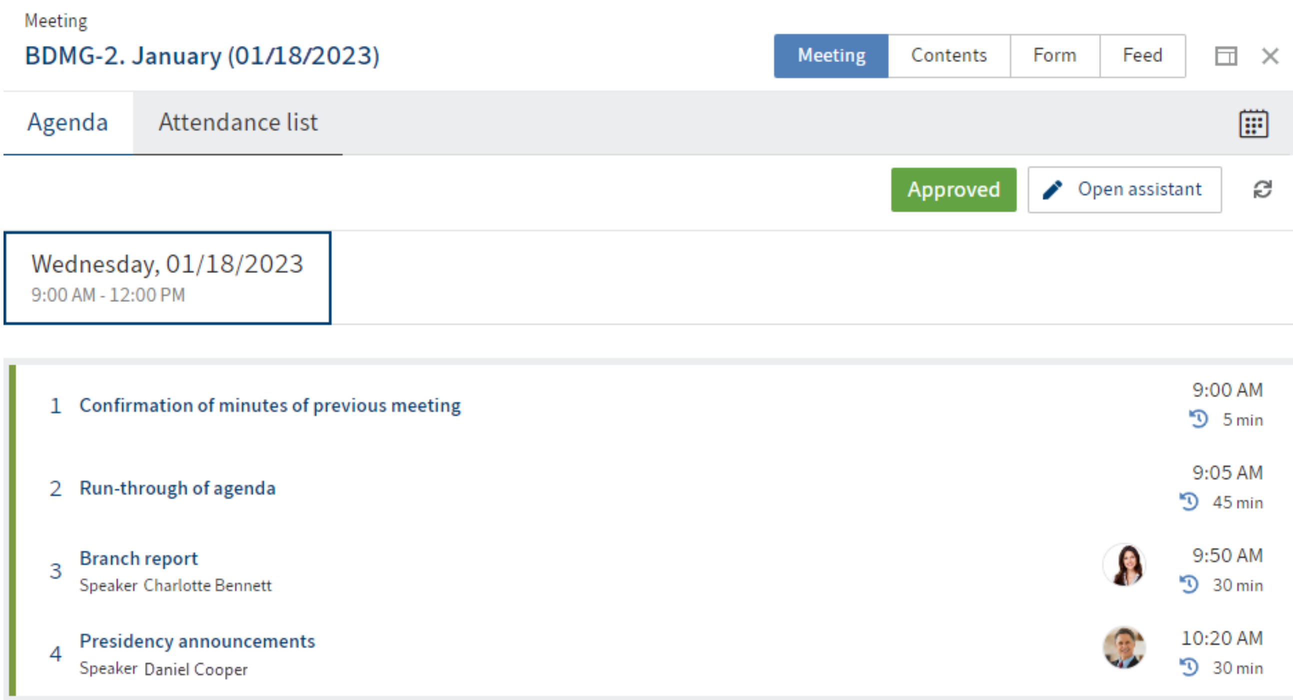
Meeting app

The meeting app guides you through the meeting. The app provides regular participants with all the information they need for the actual meeting as well as details of the items.

You will find the meeting app on the *Meeting* tab of a meeting. It can also be used as a standalone app. You will need the direct link or the QR code for this.

The meeting app features the Agenda and Attendance list tabs.

Agenda

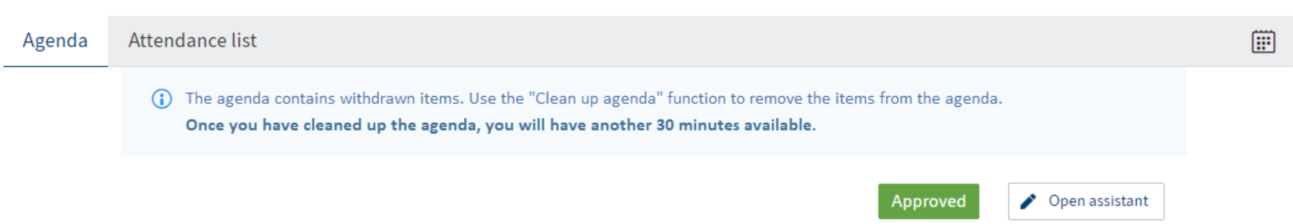


The agenda contains all scheduled items and organizational items.

If you have meetings that are held on multiple days, you can navigate back and forth using the date tabs.

The agenda takes you to the detail pages of all scheduled items.

Information for organizers

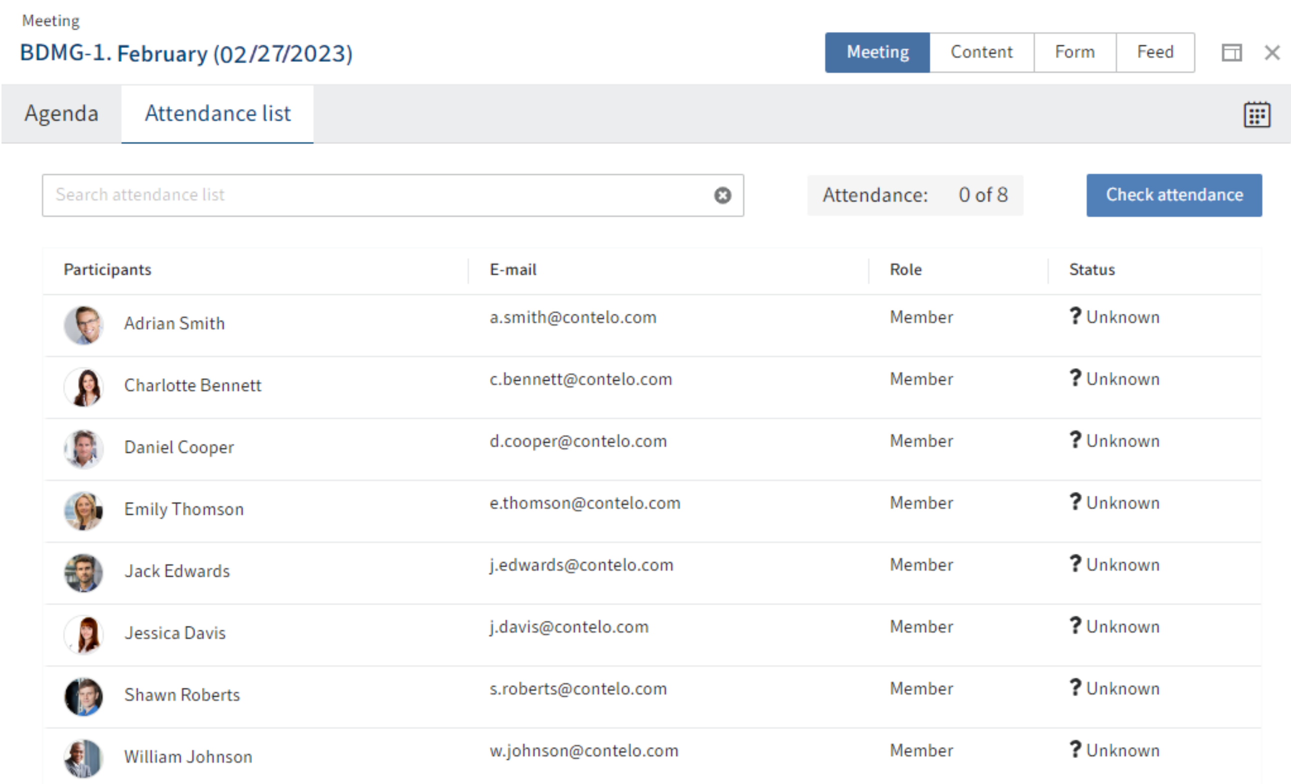


Organizers are notified if there are items on the agenda that have been withdrawn. To clean up the agenda, you need to open the meeting assistant, which you also use to plan the agenda.

Attendance list

The attendance list contains all members and guests who are registered for the meeting.

Information for organizers



At the start of the meeting, you can check who is in attendance. The attendance status cannot be reversed once confirmed.

Prepare meeting

> **Information**
>
> This chapter is aimed at meeting board organizers.

To prepare for a meeting, some steps are necessary, while others are optional. The list below provides an overview of the process.

> **Information**
>
> Make sure that the meeting board settings are correct before you create the first meeting. For more information, refer to the Edit basic meeting board settings chapter.

Task	Explanation
Create item pool	An item can either be created in a meeting directly or in an item pool. An item pool first has to be created before you can start creating items in it. Not only organizers can create item pools. It is important that the item pool is in a folder that everyone who needs to create items has access to.
Create meeting or extraordinary meeting	You have to create a meeting board before you can create a meeting.
Approve meeting	In the meeting board settings, you can define whether the meetings require approval or not. If they need to be approved, you can only start preparing the meeting once the approval has been issued.
Prepare meeting	Meetings are prepared in the meeting assistant. This is where you create the agenda.
Optional: Create meeting file	You can create a meeting file containing the information compiled so far for the meeting. You can send it to the meeting participants using the *Send message* function.
Optional: Send message	You can send messages to the participants of the meeting. You also have the option to attach documents, e.g. the meeting file.

Create meeting

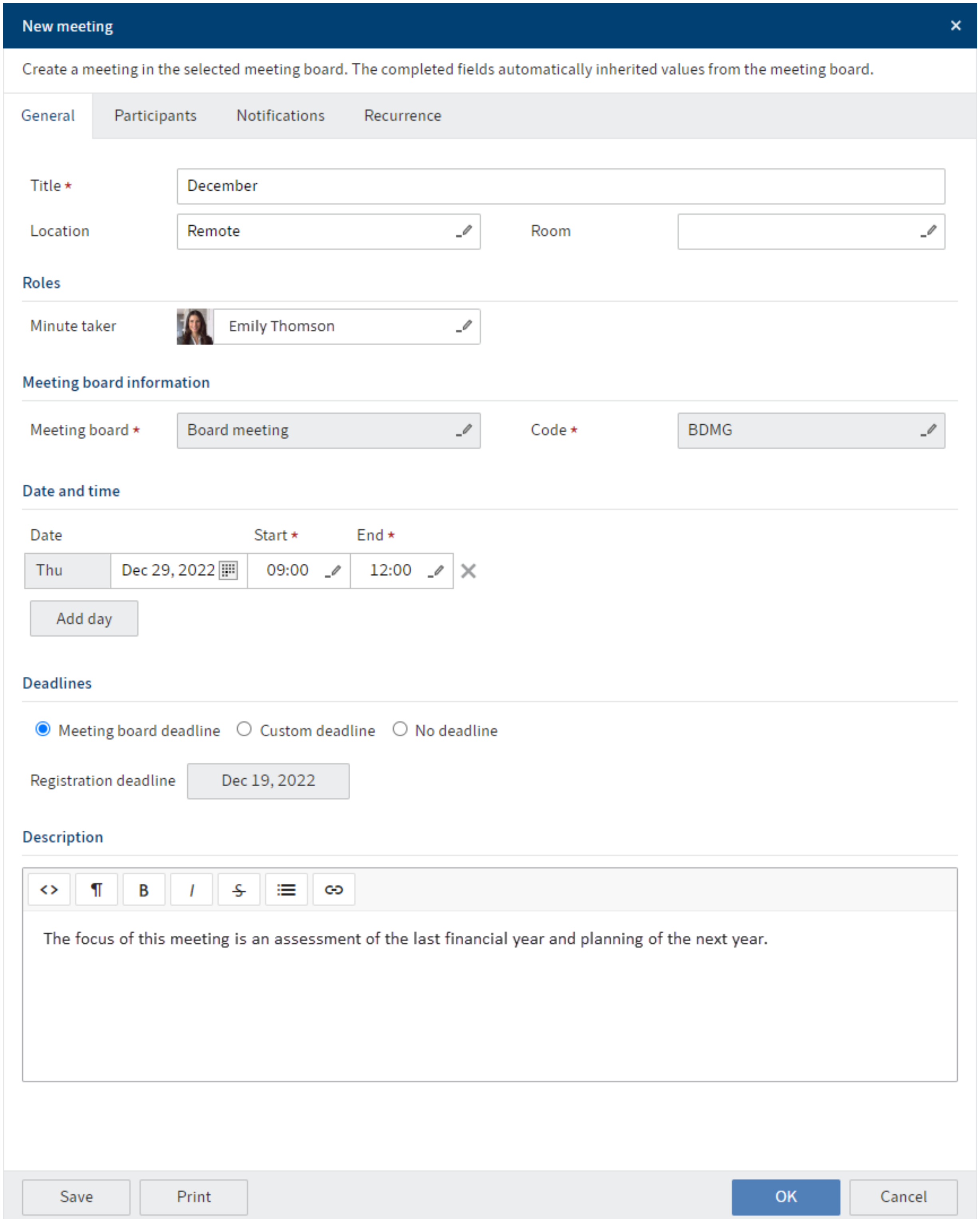
You can create meetings in a meeting board that you are an organizer of. The short names of all meetings are automatically given a consecutive number as well as a code that was stored when the meeting board was created.

Method

1. Select the meeting board.
2. On the ribbon, select *New > Meeting > New meeting*.
3.

Complete the fields in the *New meeting* dialog box as required.

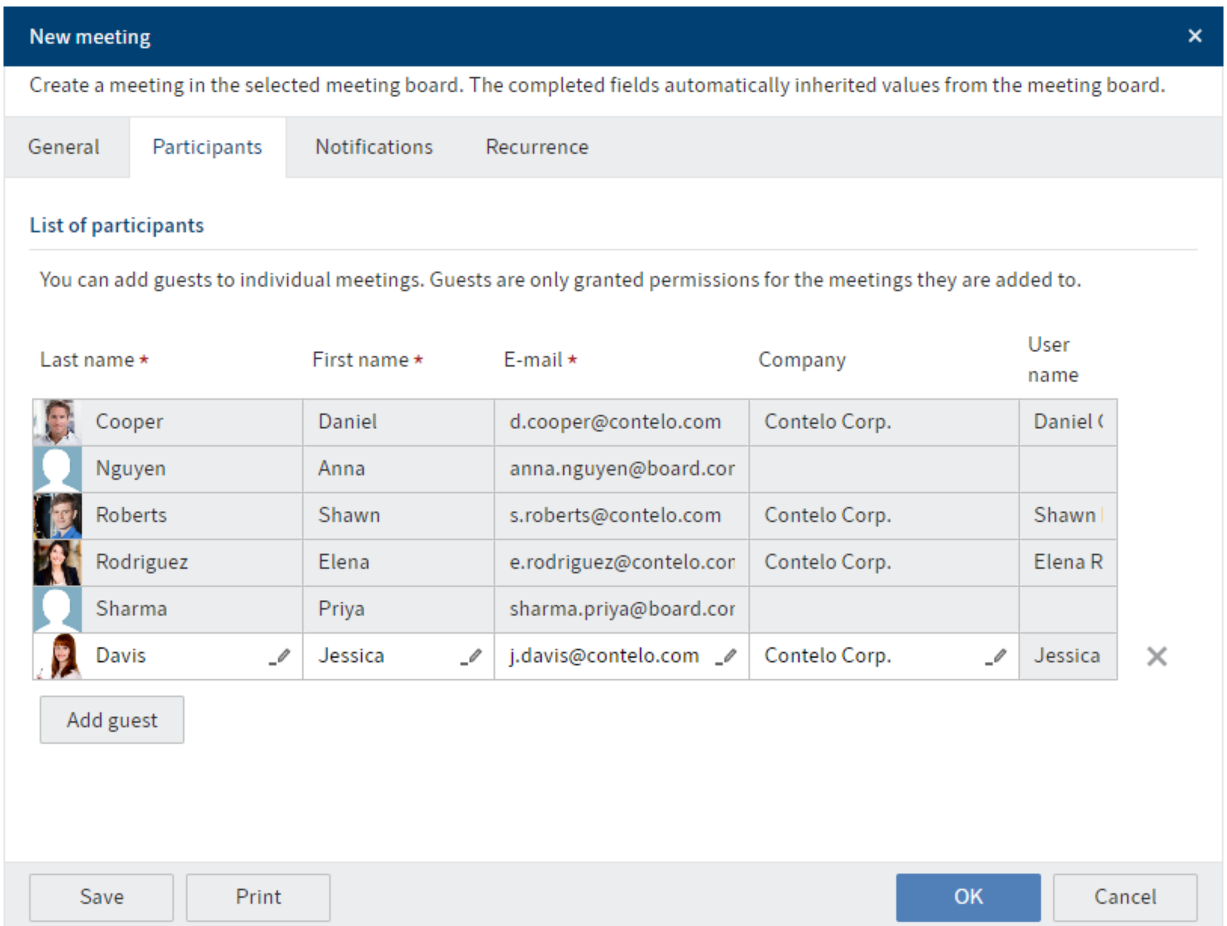
'General' tab



This tab already contains some general information about the meeting board.

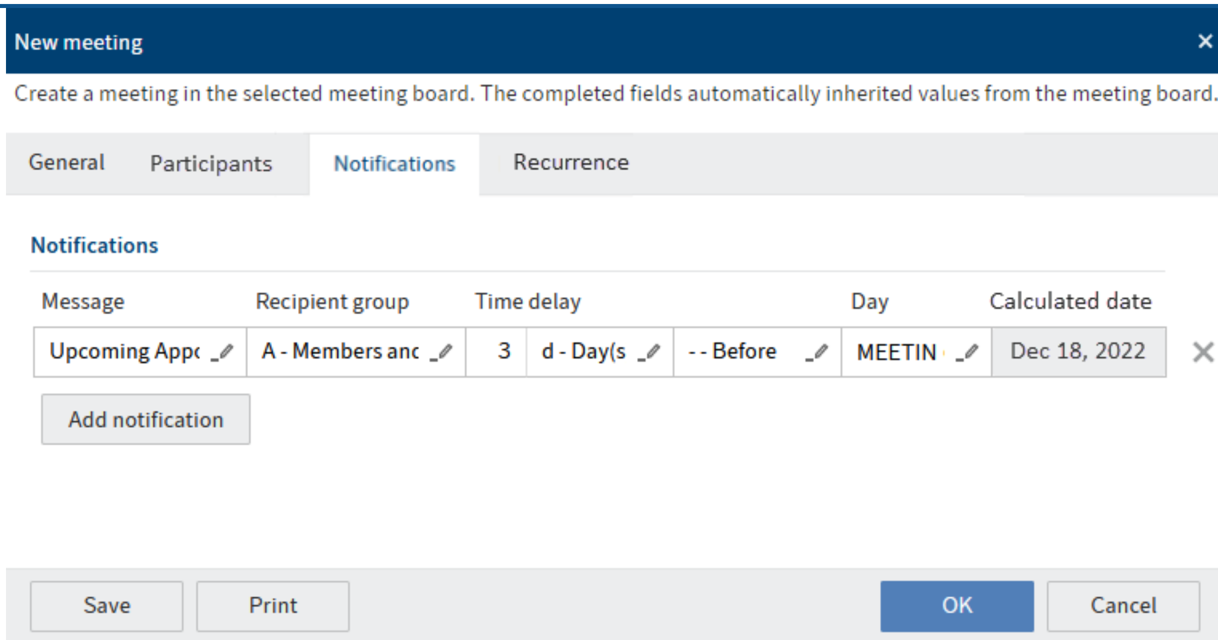
Field	**Explanation**
Title	If the meeting board has already been given a default name, this is already entered.
Minute taker	You can retain the person who was entered as the minute taker for the meeting board, or you can select someone else.
Add day	You can create multi-day meetings. You cannot create recurrences for multi-day meetings (see *Recurrence* tab).
Registration deadline	If a registration deadline was entered for the meeting board, it is selected here. However, you can also set a custom deadline or turn off the deadline. Once the registration deadline has passed, you can no longer register, submit, or withdraw items.
Description	If you create recurrences for these meetings, the description is used for all recurrences.

'Participants' tab



This tab contains the members of the meeting board. You also have the option to add guests. They will only be authorized for the meeting you are currently creating. If you create recurrences for the meeting, guests are only added to the first meeting.

'Notifications' tab



This tab contains the notifications that have already been created for the meeting board. You can add notifications to the meeting. Messages will be sent to the selected recipient group before or after the meeting, depending on the settings.

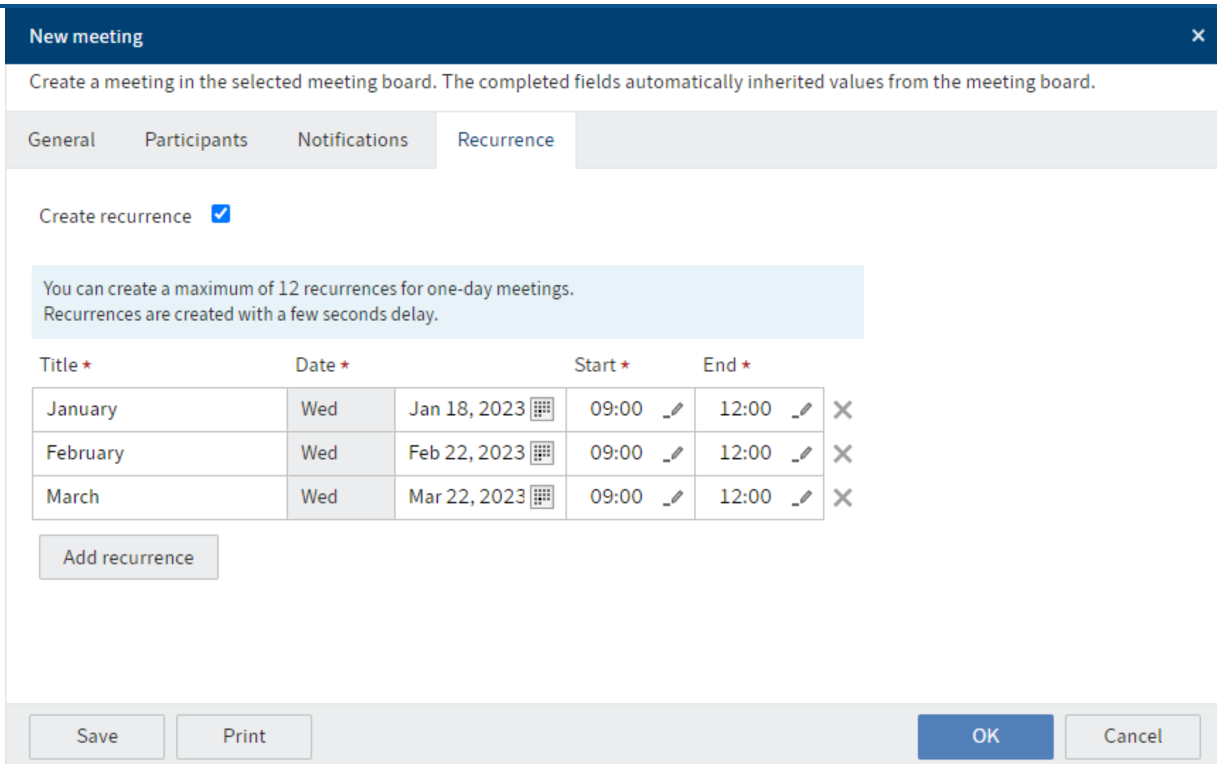
> **Information**
>
> If you want to send a notification that is not yet available, you first need to create a notification template.

For example, if you want to remind members to submit their items on time, you could enter something like this:

Message	**Recipient group**	**Time delay**	**Day**
End of registration deadline	M - All members	3 d - day(s) --Before	Registration deadline

With this information, the recipients would get an e-mail reminder three days before the end of the registration deadline. For this to work, an administrator must have created the global template *End of registration deadline*.

'Recurrence' tab



You can create a maximum of twelve recurrences of the meeting.

4. Select *OK*.

Result

The meeting is created. If you have created recurrences, they will appear after a few seconds when you refresh your client (*View > Refresh* or F5).

If there are meetings in your meeting board that need to be approved, the meeting will be in *Draft* status. At this point, they cannot be edited in the app.

Meetings that do not need to be approved will be in *Approved* status. They can be edited directly.

Outlook

- Once the date and time has been decided, you can approve it so that you can start preparing the meeting.
- If the meeting has already been approved, you can start to plan the agenda with the meeting assistant.

Create extraordinary meeting

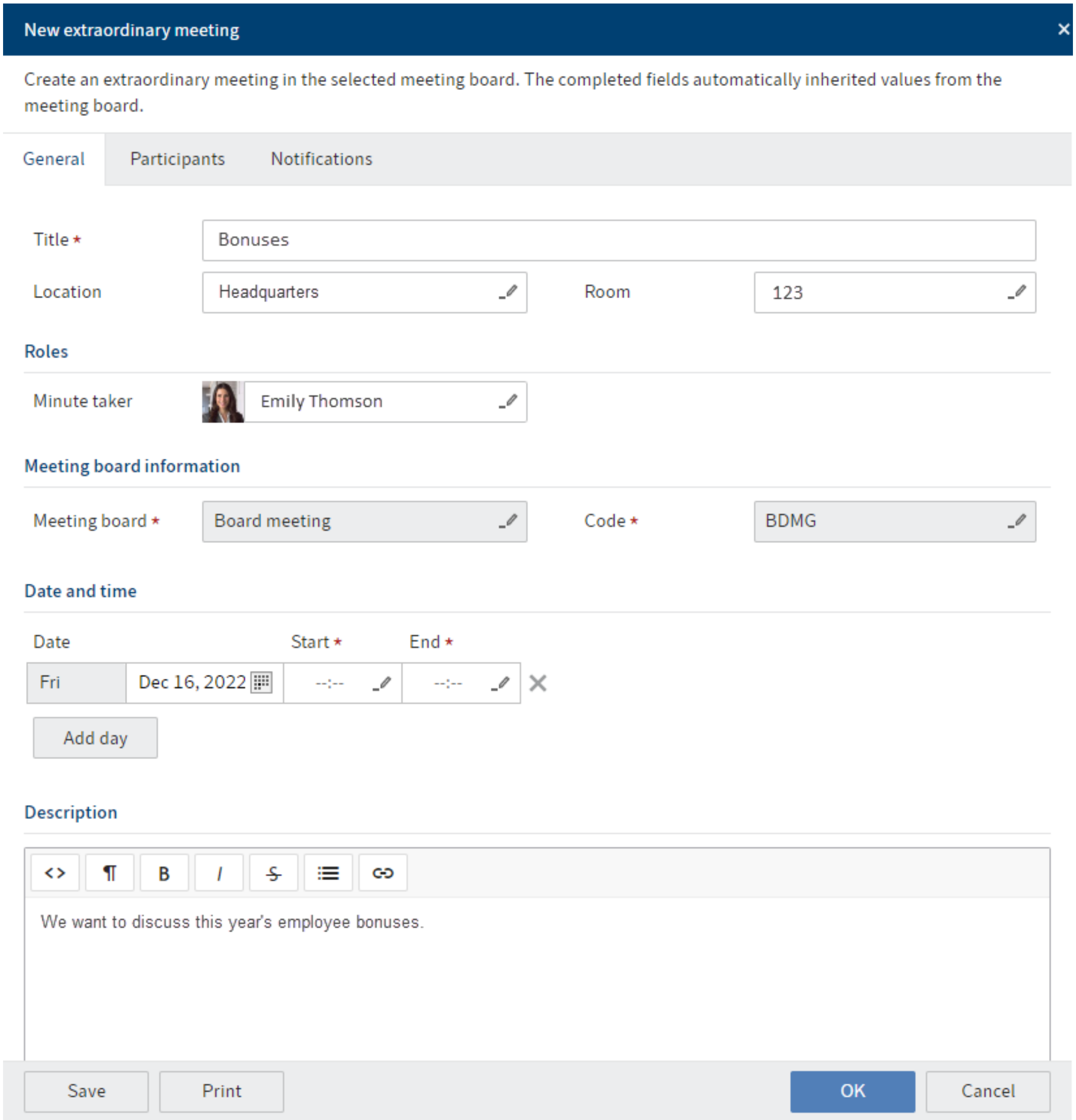
You can create extraordinary meetings in a meeting board that you are an organizer of. Extraordinary meetings have a different number range than regular meetings.

Method

1. Select the meeting board.

2.

On the ribbon, select *New > Meeting > New extraordinary meeting*.



3. Complete the fields in the *New extraordinary meeting* dialog box as required.

'General' tab

This tab already contains some general information about the meeting board.

Field	**Explanation**
Title	If the meeting board has already been given a default name, this is already entered.
Minute taker	You can retain the person who was entered as the minute taker for the meeting board, or you can select someone else.

Field	Explanation
Add day	You can create multi-day meetings. You cannot create recurrences for multi-day meetings (see *Recurrence* tab).

'Participants' tab

This tab contains the members of the meeting board. You also have the option to add guests. They will only be authorized for the meeting you are currently creating.

'Notifications' tab

This tab contains the notifications that have already been created for the meeting board. You can add notifications to the meeting. Messages will be sent to the selected recipient group before or after the meeting, depending on the settings.

For example, if you want to remind members to submit their items on time, you could enter something like this:

Message	Recipient group	Time delay	Day
End of registration deadline	M - All members	3 d - day(s)	--Before Registration deadline

With this information, the recipients would get an e-mail reminder three days before the end of the registration deadline. For this to work, an administrator must have created the global template *End of registration deadline*.

4. Select *OK*.

Result

The meeting is created.

Extraordinary meetings have the name code *AO* and a separate number range.

If there are meetings in your meeting board that need to be approved, the meeting will be in *Draft* status. At this point, it cannot be edited in the meeting assistant.

Meetings that do not need to be approved will be in *Approved* status. They can be edited directly.

Outlook

- Once the date and time has been decided, you can approve it so that you can start preparing the meeting.
- If the meeting has already been approved, you can start to plan the agenda with the meeting assistant.

Approve meetings

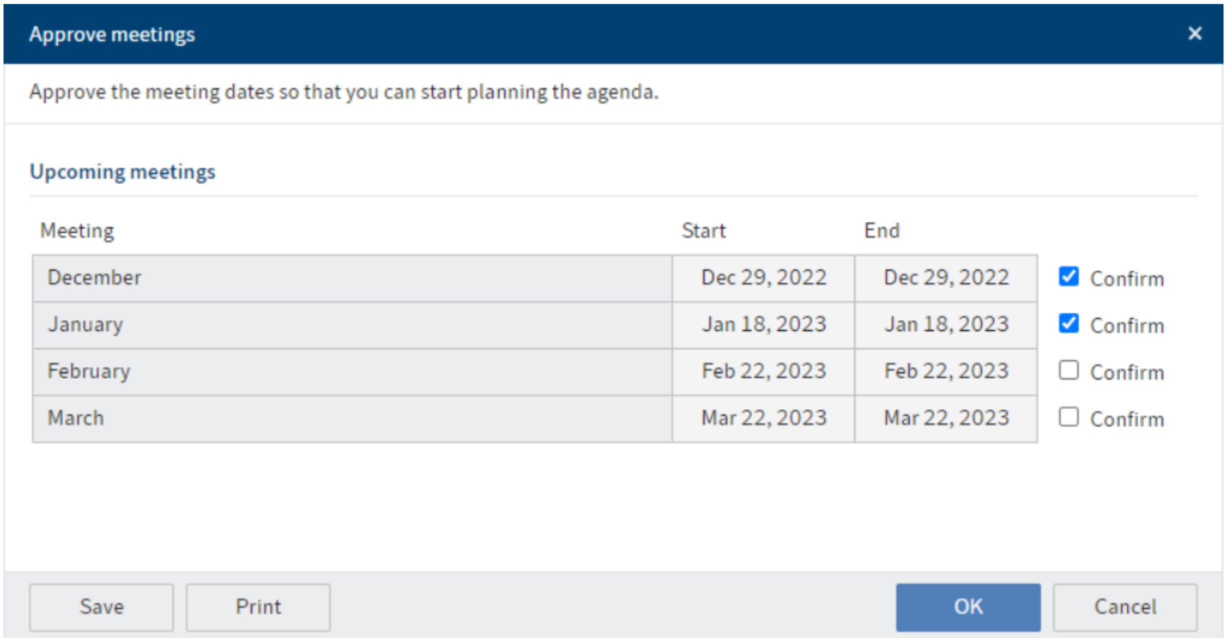
If your meeting board is subject to an approval process, you can approve the meeting dates.

Method

1.

Select the meeting board you want to approve meetings for.

2. On the ribbon, select *Meeting > Board > Approve meetings*.



3. In the *Approve meetings* dialog box, check *Confirm* next to all meetings you want to approve.

   If you cannot approve a meeting, it means that it has already been approved.

4. Select *OK*.

Result

The meeting is now in *Approved* status.

Outlook

- You can now start registering items for the meeting.
- You can prepare the meetings with the meeting assistant.

Prepare meeting

You use the meeting assistant to prepare for meetings. In particular, you have the option to insert agenda items from the agenda pool and rearrange them as required.

For more information, refer to the separate Meeting assistant chapter.

Create meeting file

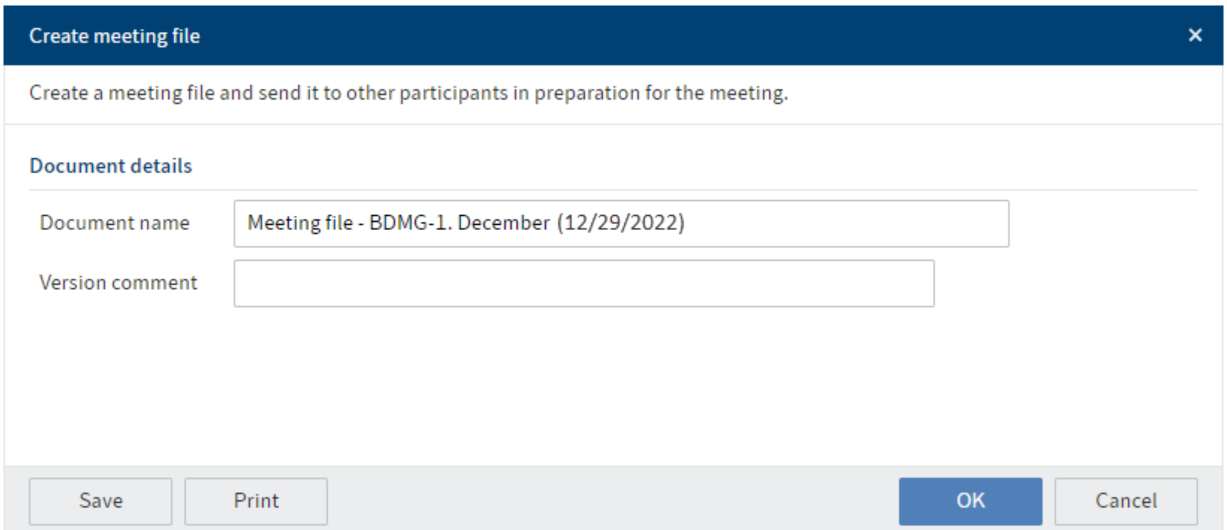
You can create a meeting file that you can share with the other meeting participants.

A meeting file is a PDF with the following information:

Information	**Details**
Meeting metadata	Title, date, location, status, start, end, minute taker
Agenda	Title of all items
Participant list with information on all members and guests	Name, e-mail address, role
Information on the items	Title, duration, speaker, description, proposals (possibly with attachments)

Method

1. Select the meeting.
2. On the ribbon, select *Meeting > Meeting > Create meeting file*.



3. You also have the option to enter a version comment in the *Create meeting file* dialog box.

   The document name is generated automatically. You can edit it if necessary.
4. Select *OK*.

Result

The meeting file is created in the meeting folder in the *Files* folder.

Outlook

You can send the meeting file to the meeting participants, e.g. using the Send message function.

Edit meeting

Information

This chapter is aimed at meeting board organizers.

If there are significant changes after you have created a meeting, you have the following options:

Task	Explanation
Edit basic settings in the meeting form	You can use the meeting form to edit some general settings and the notifications.
Reschedule meeting	You can reschedule the meeting to another time on the same day or to another day.
Cancel meeting	You can cancel the meeting. Items that are already on the agenda can be rescheduled to another meeting.
Edit list of participants	You can remove members and guests from the meeting or add guests.

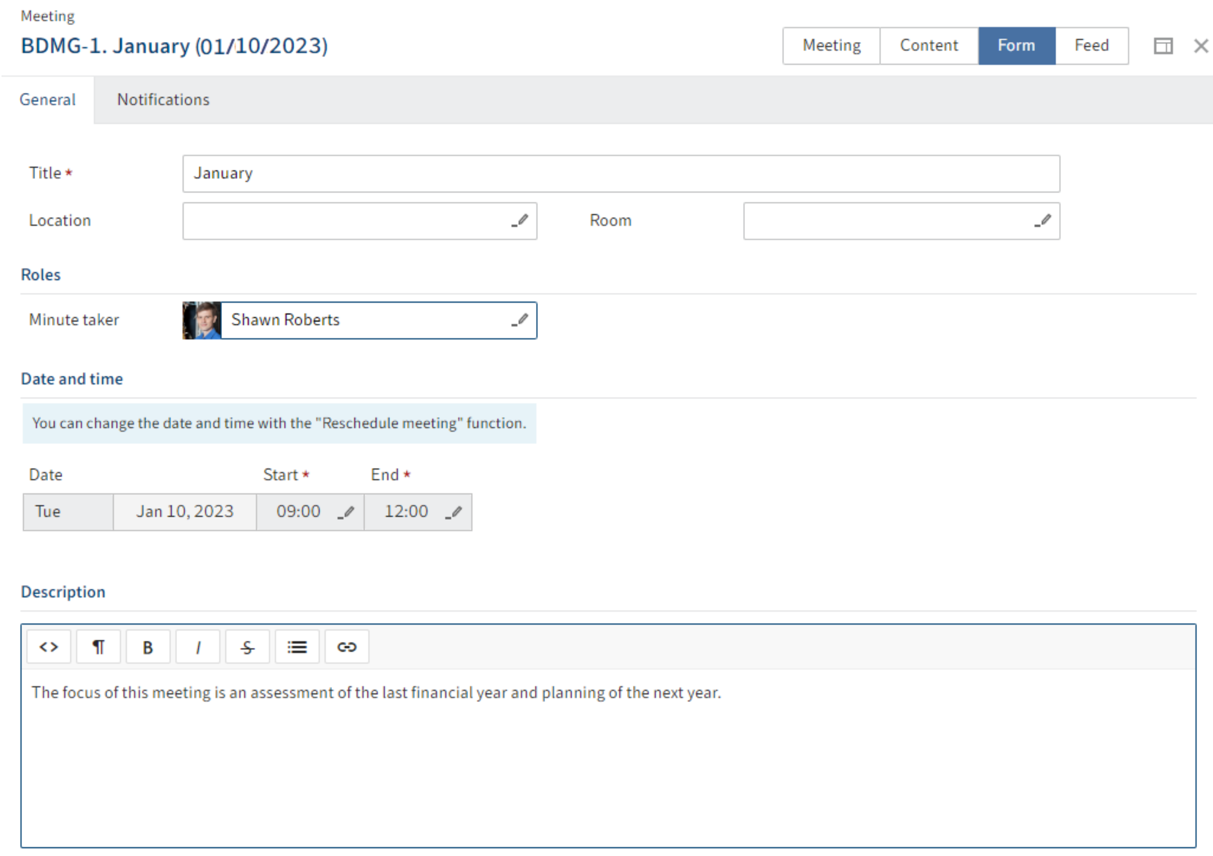
You also have the option to send a message to participants to notify them of any changes. For more information, refer to the Send message chapter.

Edit basic meeting settings

You can edit some meeting settings retroactively.

Method

1. Select the meeting.
2. Select the *Form* tab.



Refer to the Create meeting chapter for details of the settings that you can make.

To change the time and date of a meeting, use the Reschedule meeting function.

You cannot use the form to add or remove participants. Use the Edit list of participants function for this.

3. Select *Save*.

Result

The changes are applied.

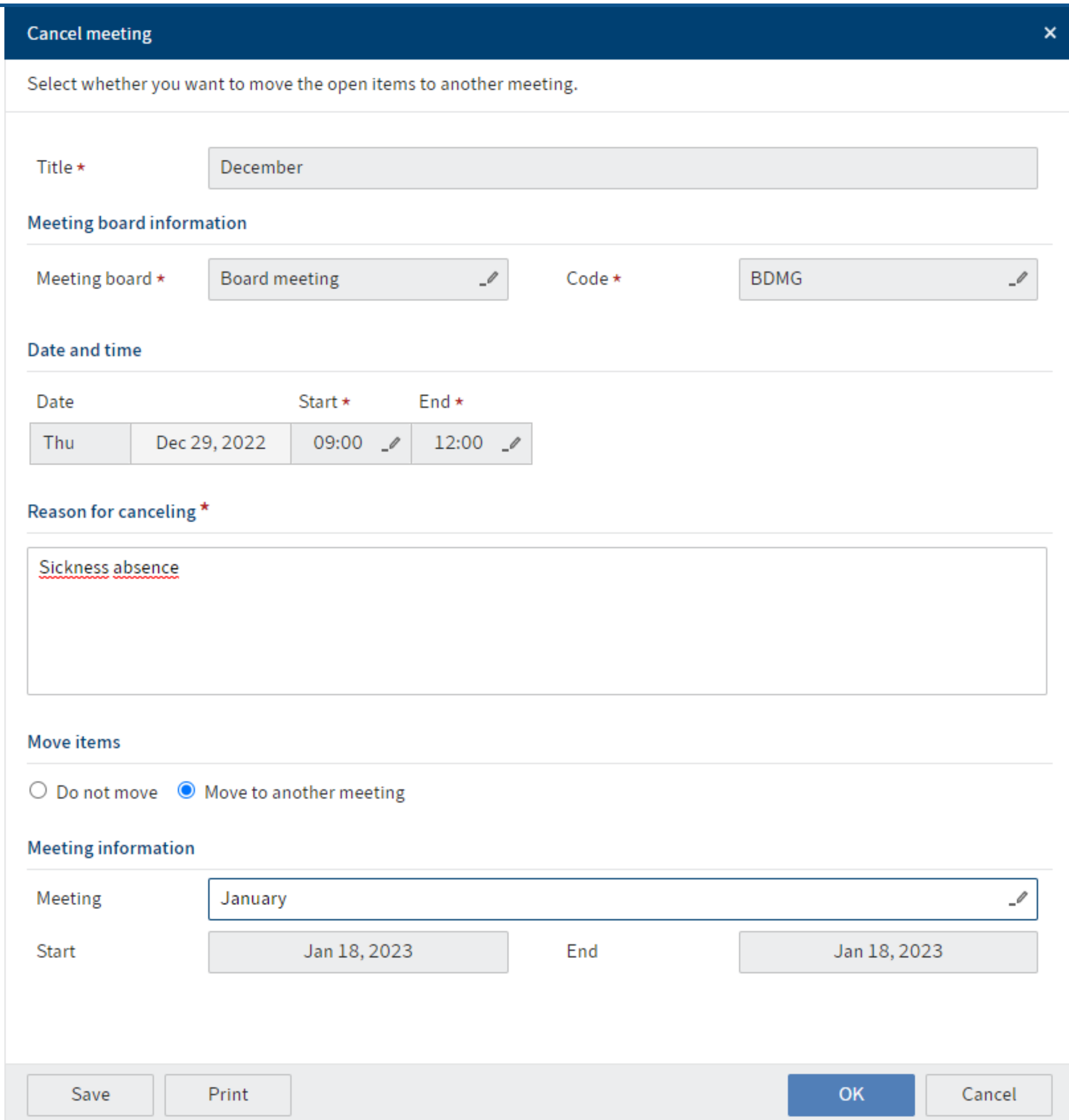
Cancel meeting

You can cancel a meeting that has already been scheduled. If there are already items on the agenda for that meeting, they can be rescheduled to another meeting in the meeting board.

Method

1. Select the meeting.

2. On the ribbon, select *Meeting > Meeting > Cancel meeting*.



3. Complete the fields in the *Cancel meeting* dialog box as required.

Field	**Explanation**
Reason for canceling	A meeting cannot be canceled without a reason. The reason is documented in a feed post.
Move items	You can choose whether you want to move items to another meeting. If you don't move them, the items remain in the meeting being canceled and are not discussed.

4. Select *OK*.

Result

The meeting is now in *Canceled* status.

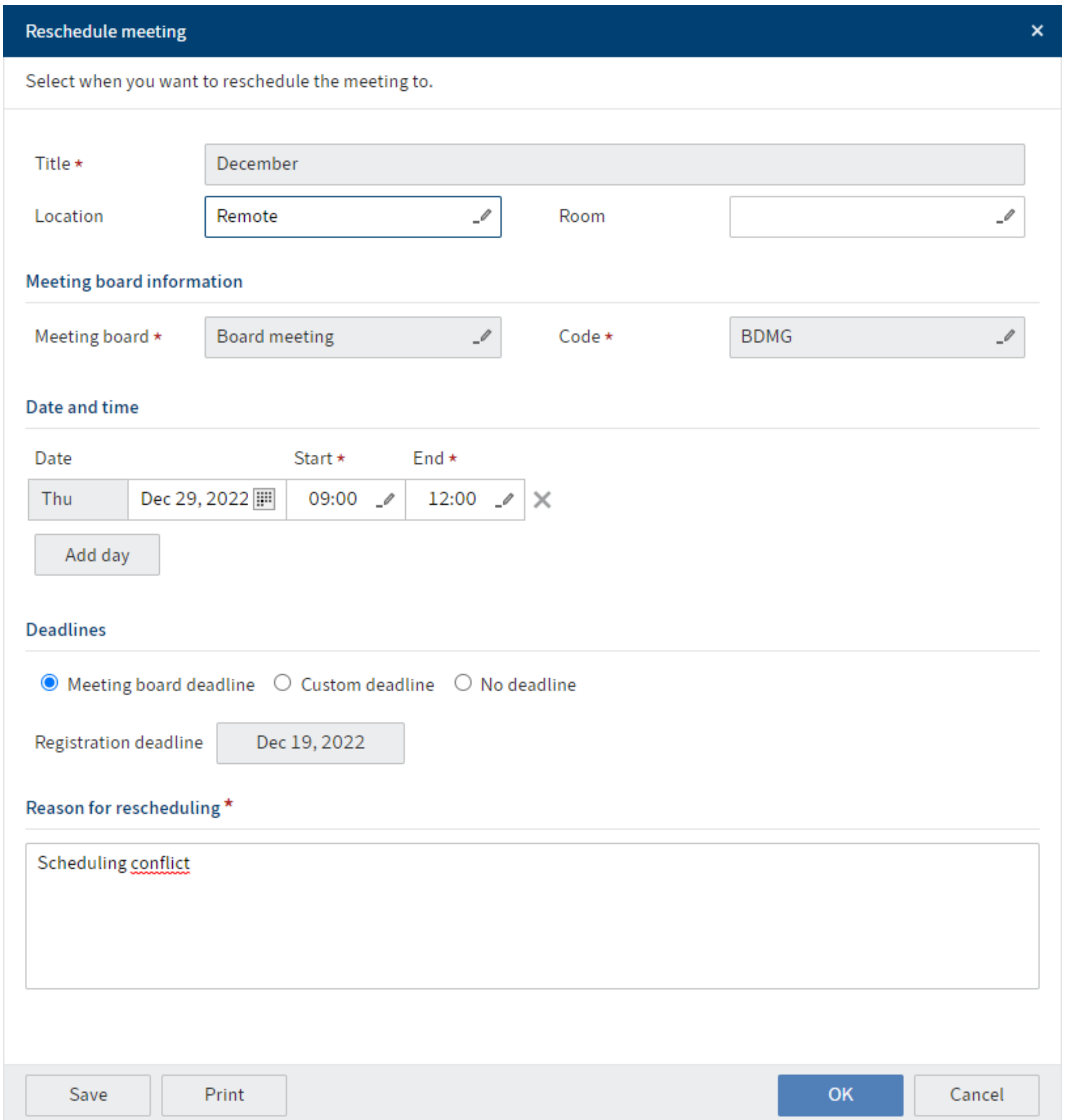
If you have moved items, you will find them in the agenda pool of the selected meeting.

Reschedule meeting

You can reschedule the meeting to another time.

Method

1. Select the meeting.
2. On the ribbon, select *Meeting > Meeting > Reschedule meeting*.



3.

Change the date, time, or number of days.

4. Enter the reason for rescheduling the meeting.

5. Select *OK*.

Result

The meeting is rescheduled.

Edit list of participants

You can remove members from individual meetings, create or remove guests.

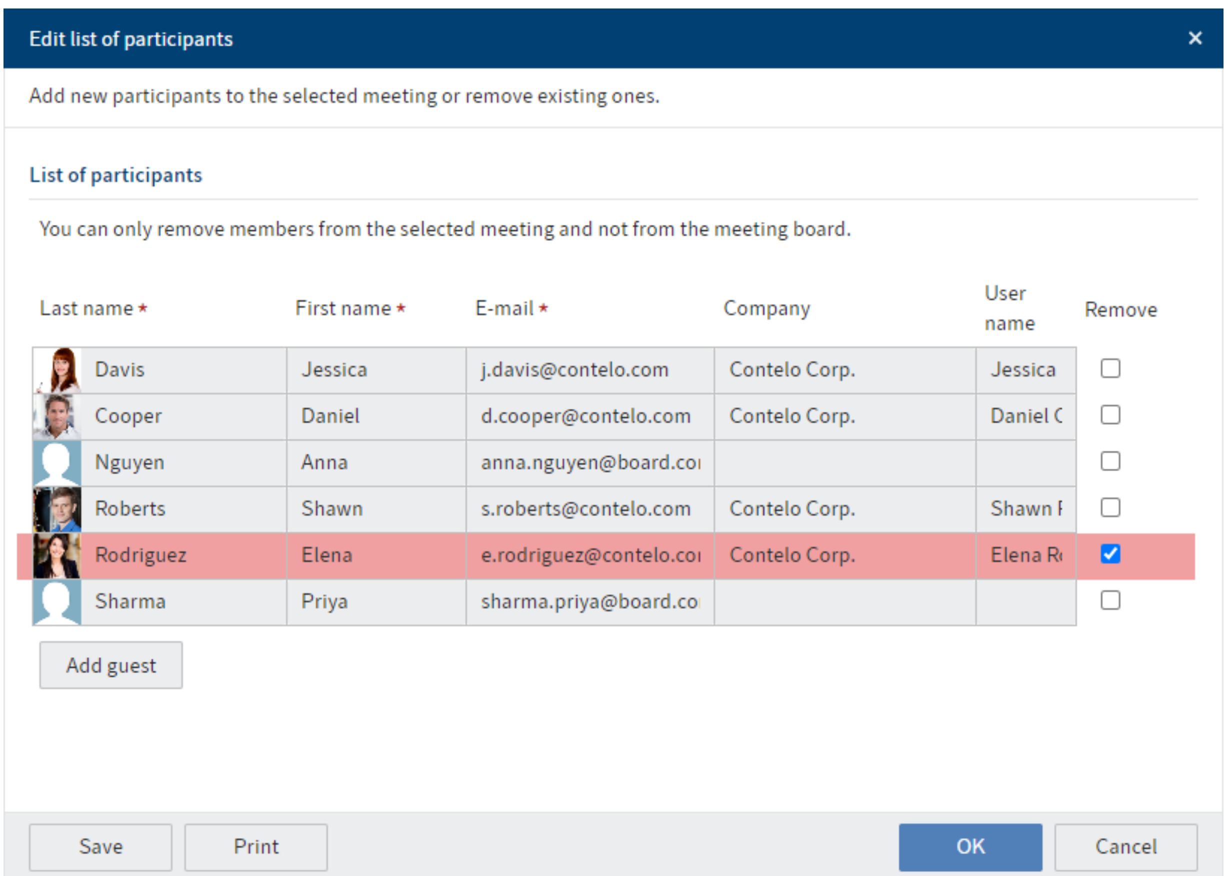
Alternative

If a member is leaving the committee or body for an extended period of time, change their status to Inactive.

Method

1. Select the meeting.

2. On the ribbon, select *New > Meeting > Edit list of participants*.



In the *Edit list of participants* dialog box, you can see the members and guests who are currently registered for the meeting.

Action	**Explanation**
Remove	If you remove a member, it is only removed from the meeting. It remains a member of the meeting board.
Add guest	With this function, you can add guests to the selected meeting, but not add members to the meeting board.

3. Select *OK*.

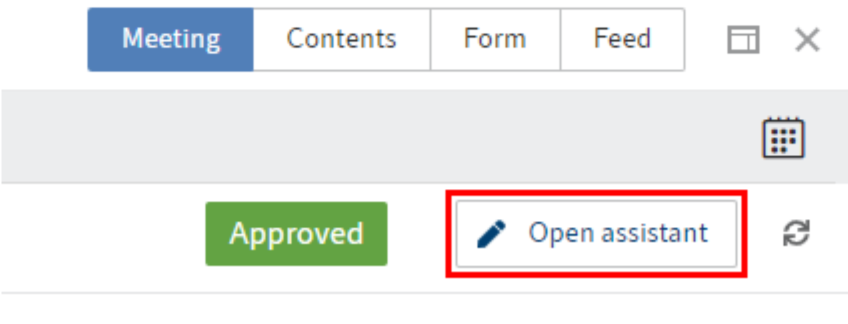
Result

The corresponding participants are deleted from the *Participants* folder. Guests lose their permissions for the meeting, whereas members retain them.

Meeting assistant

> **Information**
>
> This chapter is aimed at meeting board organizers.

You can prepare and conduct meetings in the meeting assistant.



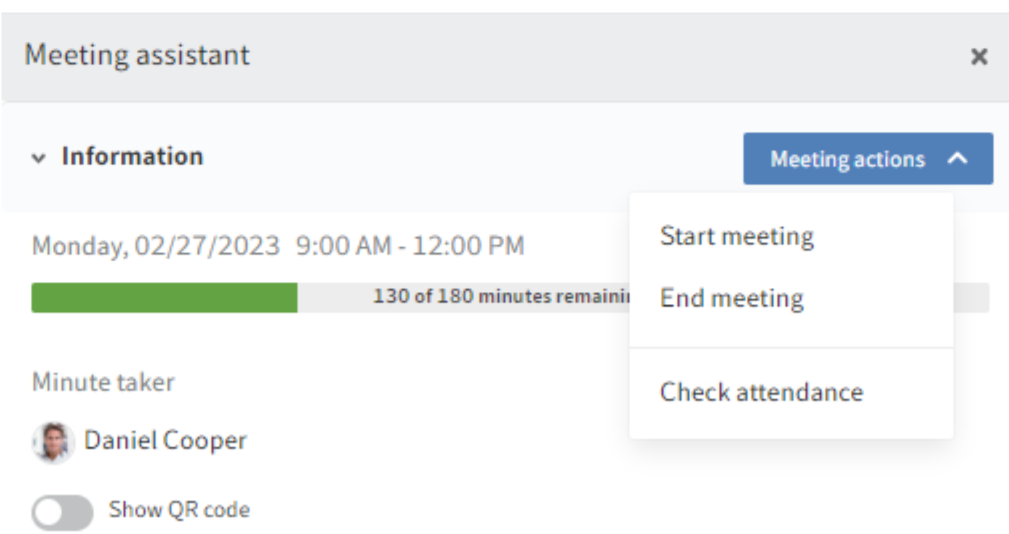
You can access the meeting assistant through the meeting app (Select meeting > *Meeting* tab > *Open assistant* button).

The meeting assistant consists of the following areas:

- Information
- Organize agenda
- Agenda pool

When you open the meeting assistant, you also get access to agenda functions.

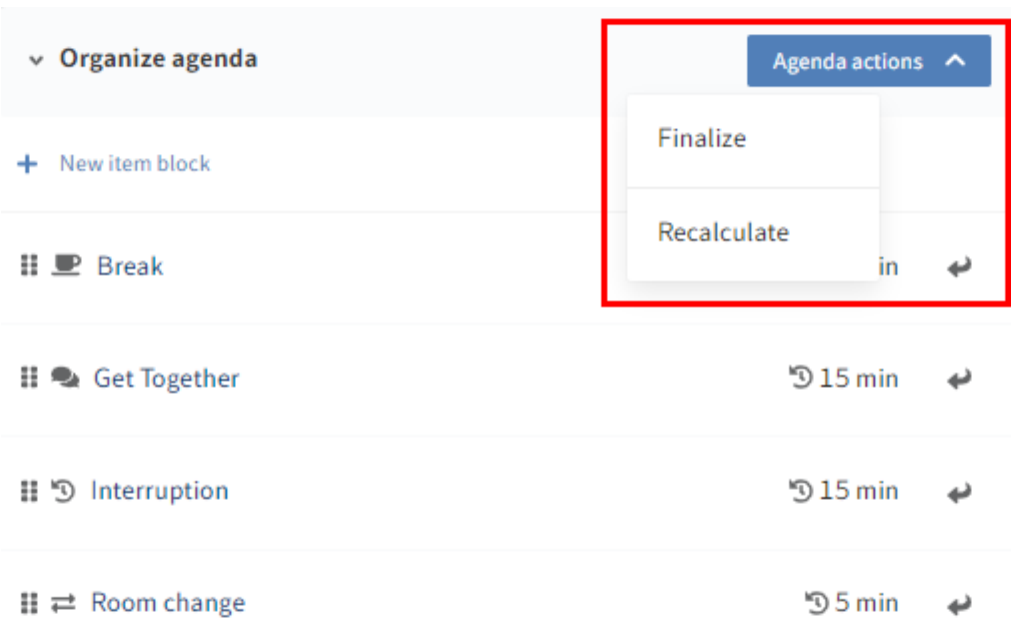
Information



You have the following options in this area:

Time information	The timeline function shows whether there is enough time remaining for other items or whether the allotted meeting time has run over.
Show QR code	The show QR function allows you to open the meeting as a standalone app. You can use the slider to zoom in and out of the QR code. When you close the meeting assistant, the QR code remains on the agenda and can be scanned by the participants.
Start meeting	You can start the meeting (Meeting actions > Start meeting). Once the meeting has started, you can start writing minutes on the item detail pages.
End meeting	You can end the meeting. After the meeting has ended, you can do the follow-up.
Check attendance	You can check attendance. The button takes you to the attendance list.

Organize agenda



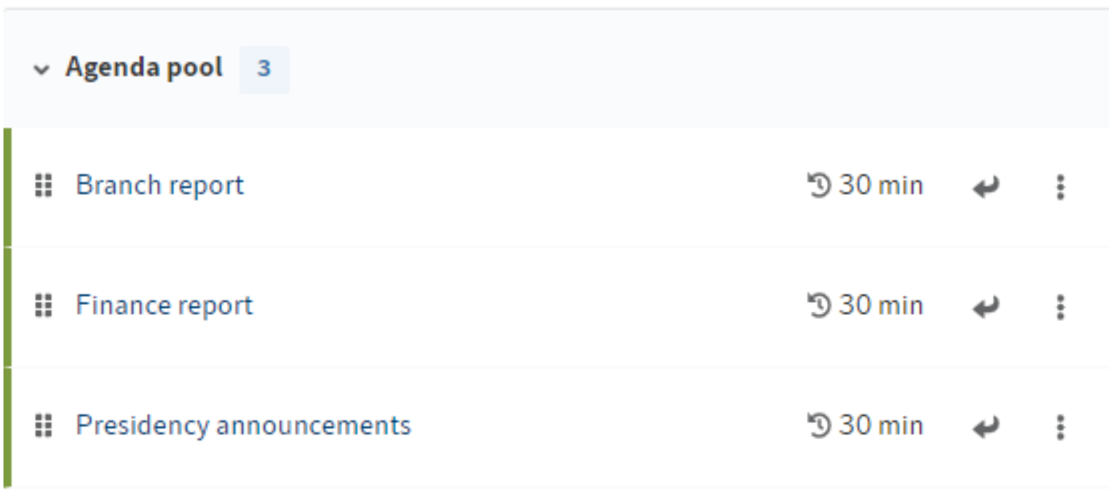
This area contains the following organizational items:

- Get-together
- Break
- Room change
- Interruption: This item can be inserted to document any unscheduled interruptions in the meeting. You also have the option to enter the reason why the meeting was interrupted in the form.

You have the following options:

Create item block	You can create item blocks. An item block is inserted directly into the agenda and you can add items to it.
Add organizational item	You can add organizational items to the agenda. You can insert each organizational item as many times as you like. You can either drag and drop the items or use the arrow buttons. Once an organizational item has been added to the agenda, you can edit its duration.
Finalize agenda	You can finalize the agenda (Agenda actions > Finalize agenda). Once the agenda is finalized, participants know that there are not going to be any more changes. You can use the Send message function to notify participants that the agenda is final.
Check attendance	You can check attendance. The button takes you to the attendance list.

Agenda pool



The agenda pool contains all items that can be scheduled for the agenda.

There are different ways to put items in the agenda pool:

- The item was registered directly when the meeting was created.
- The item was created in an item pool and was registered for the meeting from there. In this case, you cannot view the contents of the item yet. However, you can see the form and can schedule the item.
- The item was created in an item pool and was submitted to the meeting from there.

You have the following options:

Insert item	You can insert items into the agenda. You can either drag and drop the items or use the arrow buttons.
Open detail page	You can view the full details of an item on the item detail page. To access the page, select the title of the item or click the three-dot menu > *Open detail page*.

Agenda

You can edit the agenda as long as the meeting assistant is open. When you select an item, you will see buttons that allow you to edit the item.

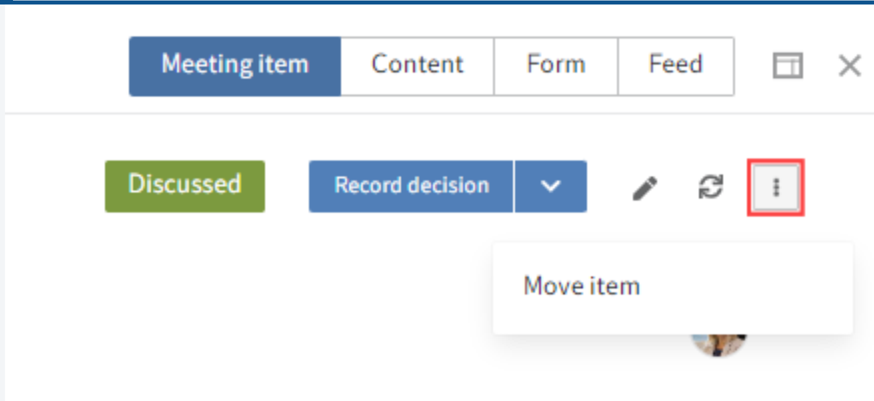
You have the following options:

Edit duration	You can edit the allotted duration of the item. Click on the item and select the plus or minus button. Alternatively, you can click the three-dot menu and type in the duration in the input field.
Remove item	You can remove items from the agenda. Delete organizational items by clicking the three-dot menu > *Delete*. You can move items to the agenda pool by dragging and dropping them or by clicking the three-dot menu > *Move to agenda pool*.
Open detail page	You can view the full details of an item on the item detail page. To access the page, select the title of the item, click the three-dot menu > *Open detail page*, or press the D key.
Rearrange items	You can rearrange the items on the agenda. The table below contains more information about this:

You have the following options for moving an item in the agenda:

Move	You can move the item up or down in the following ways: - Drag-and-drop - Single and double arrow buttons - Three-dot menu: You will also find the corresponding keyboard shortcuts here
Insert into item block	You can insert items into item blocks. To insert an item into a item block, the item must be below the item block on the agenda. You have the following options: - Drag-and-drop - Right arrow curving down button (level down)
Move to another day	If you have meetings that are held on multiple days, you can move the item to another day. You can select the day using the three-dot menu.

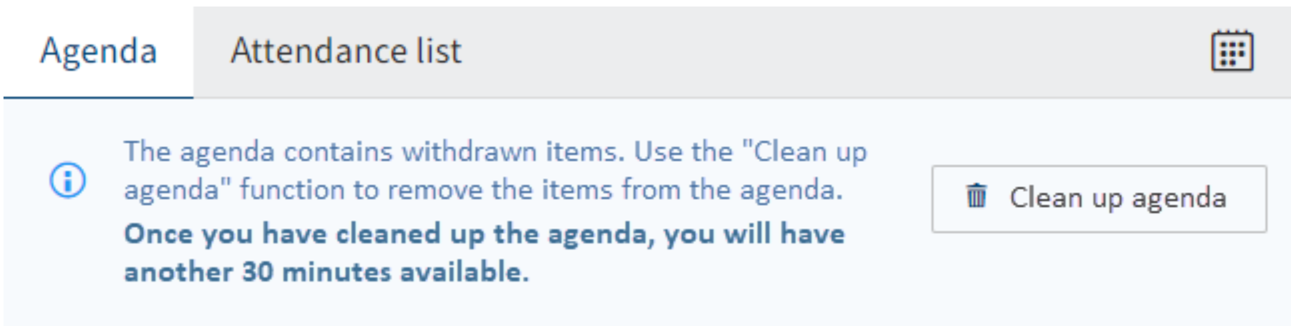
Information



If you want to move an item to another meeting, go to the item detail page > three-dot menu > *Move item*.

Clean up agenda

If an item that has already been put on the agenda is withdrawn, you need to clean up the agenda.



The item is removed from the agenda.

Conduct meeting

Information

This chapter is aimed at meeting board organizers.

Meeting level

During a meeting, you can open the meeting app to perform the following tasks:

- Start the meeting and then check who is in attendance.
- When the meeting is finished, you end the meeting.

Item level

At the item level, you can perform the following tasks:

- You can document resolutions for the individual items.
- You can move items as required.
- You can conduct voting.

Follow up on a meeting

After a meeting has been conducted, there are still a few tasks you can perform:

Task	Explanation
Create minutes	As soon as the meeting has ended and all texts are final, you can create the minutes.
Send message	You can contact the participants after the meeting, e.g. to send them the minutes.

Create minutes

You can create minutes and share them with the other meeting participants.

Information

Organizers and minute takers can create minutes.

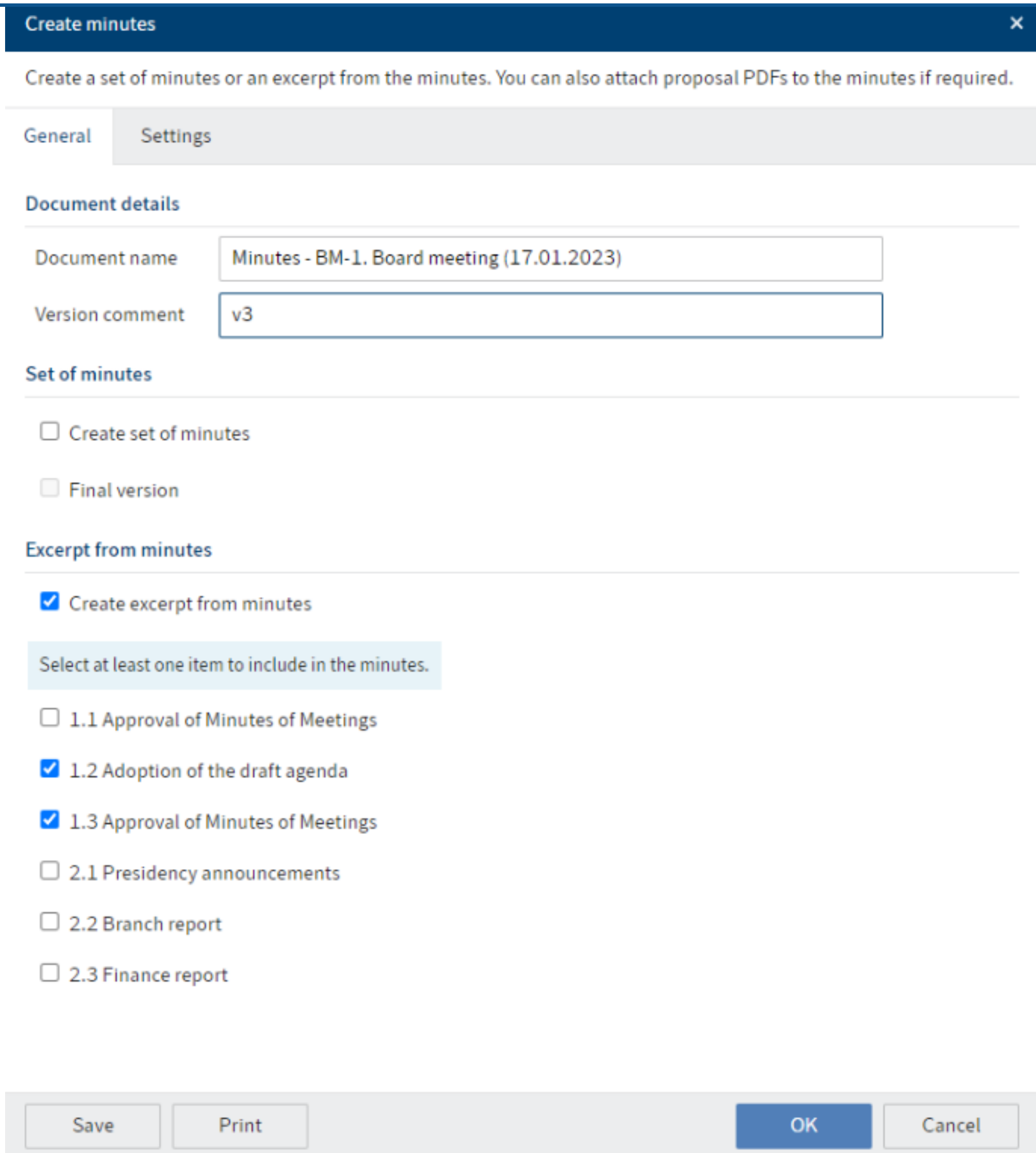
The minutes are a PDF with the following information:

Information	Details
Meeting metadata	Title, date, location
Participant list with information on all members and guests	Present/absent, name, e-mail address, role
Minutes text	On the detail page of each item, there is a field for the minutes text. The minute taker and organizer have access to this text field.
Information on the items	Title, duration, speaker, description, proposals (possibly with attachments)
Decisions	
Voting results	Voting issue, result, x of y votes cast
Notes relevant to the minutes	Title of note, created by, content

Method

1. Select the meeting.

2. On the ribbon, select *Meeting* > *Meeting* > *Create minutes*.



3. Complete the fields in the *Create minutes* dialog box as required.

   'General' tab

Field	Explanation
Document name	The document name is generated automatically. You can edit it if necessary.
Create set of minutes	A set of minutes contains all meeting items. You can create new versions until you mark the set of minutes as final.

Field	Explanation
Final version	As soon as you have created a final version of the set of minutes, you cannot create more sets of minutes. You can still create excerpts from the minutes.
Create excerpt from minutes	If items are only relevant for some of the participants, you can create an excerpt from the minutes for these items. You can select the items individually.

> **Information**
>
> You can create a set of minutes and an excerpt from the minutes at the same time.

'Settings' tab

Field	Explanation
Attach proposal PDF to minutes	If you select this option, the proposal PDFs are attached to the minutes.

4. Select *OK*.

Result

The minutes are created in the meeting file in the *Minutes* folder.

Outlook

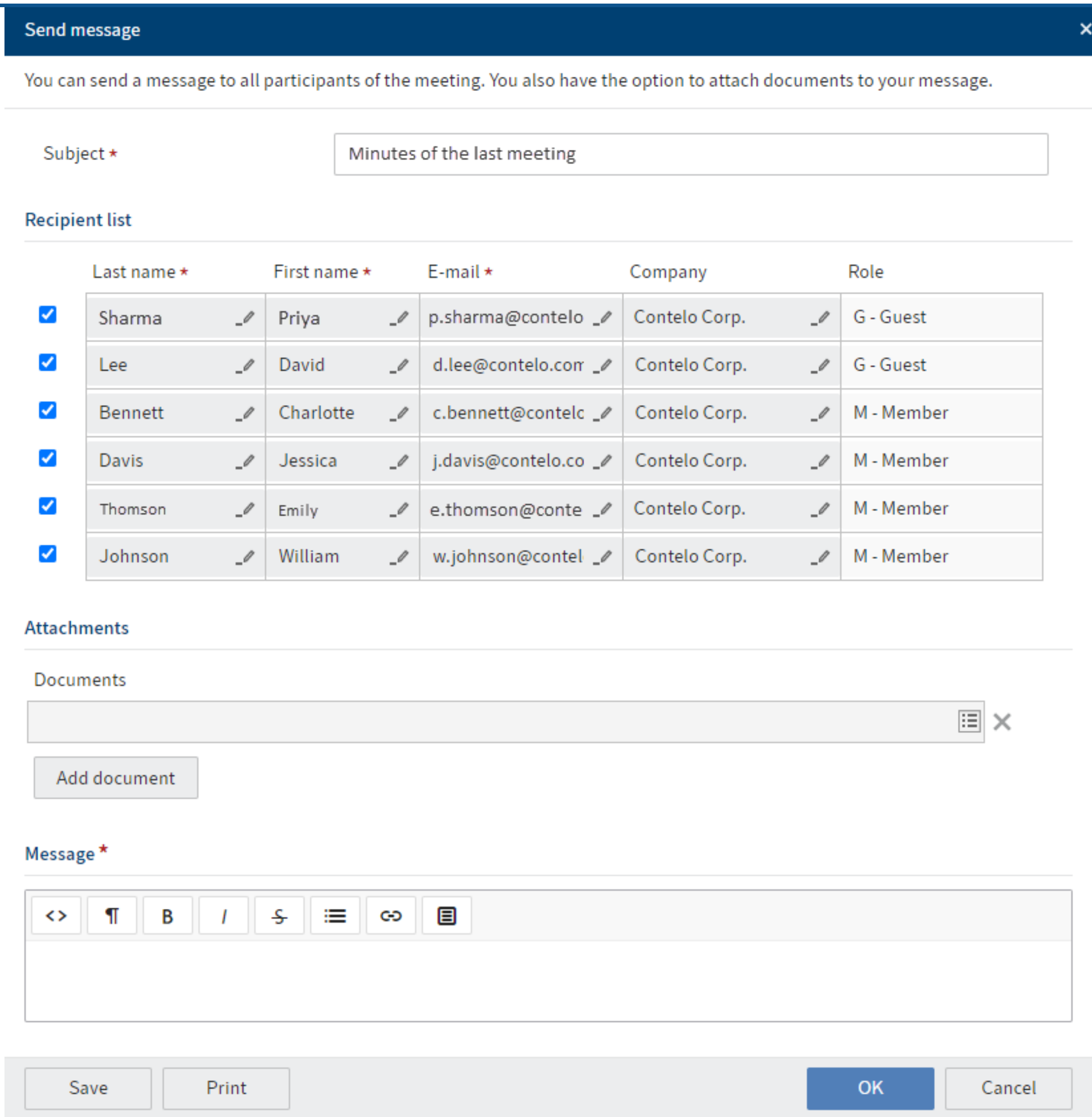
You can send the minutes to the meeting participants, e.g. using the *Send message* function.

Send message

You can send a message to the participants of the meeting.

Method

1. Select the meeting.
2. On the ribbon, select *Meeting* > *Notifications* > *Send message*.



3. Complete the fields in the *Send message* dialog box as required.

Field	Explanation
Recipient list	The recipient list automatically contains all meeting participants. You can remove individuals from the list.
Attachments	You can attach documents that are stored in the meeting folder to your message, e.g. the meeting file or the minutes.
Message	You can type and format a message. You have the option to use clips to help you write text. They contain information about the meeting (e.g. location) and can be inserted into the text. To use clips, select the position in the text where you want to insert information and click *Clips*.

4. Select *OK*.

Result

The participants receive an e-mail with the selected documents attached.

Items

Introduction

With ELO Meeting Premium, departments can create and prepare items to be raised for discussion at committee and board meetings.

Permissions

The permissions for an item depend on its current location and the assigned roles.

Item location	Permissions
Item pool	When an item is in an item pool, all people who have at least read access to the item pool can view the item. The permissions depend on which permissions have been set for the item pool. The roles described below always have full access to the item.
Meeting	When an item is in a meeting, all meeting participants can view the item, upload attachments or documents, and create tasks and notes.

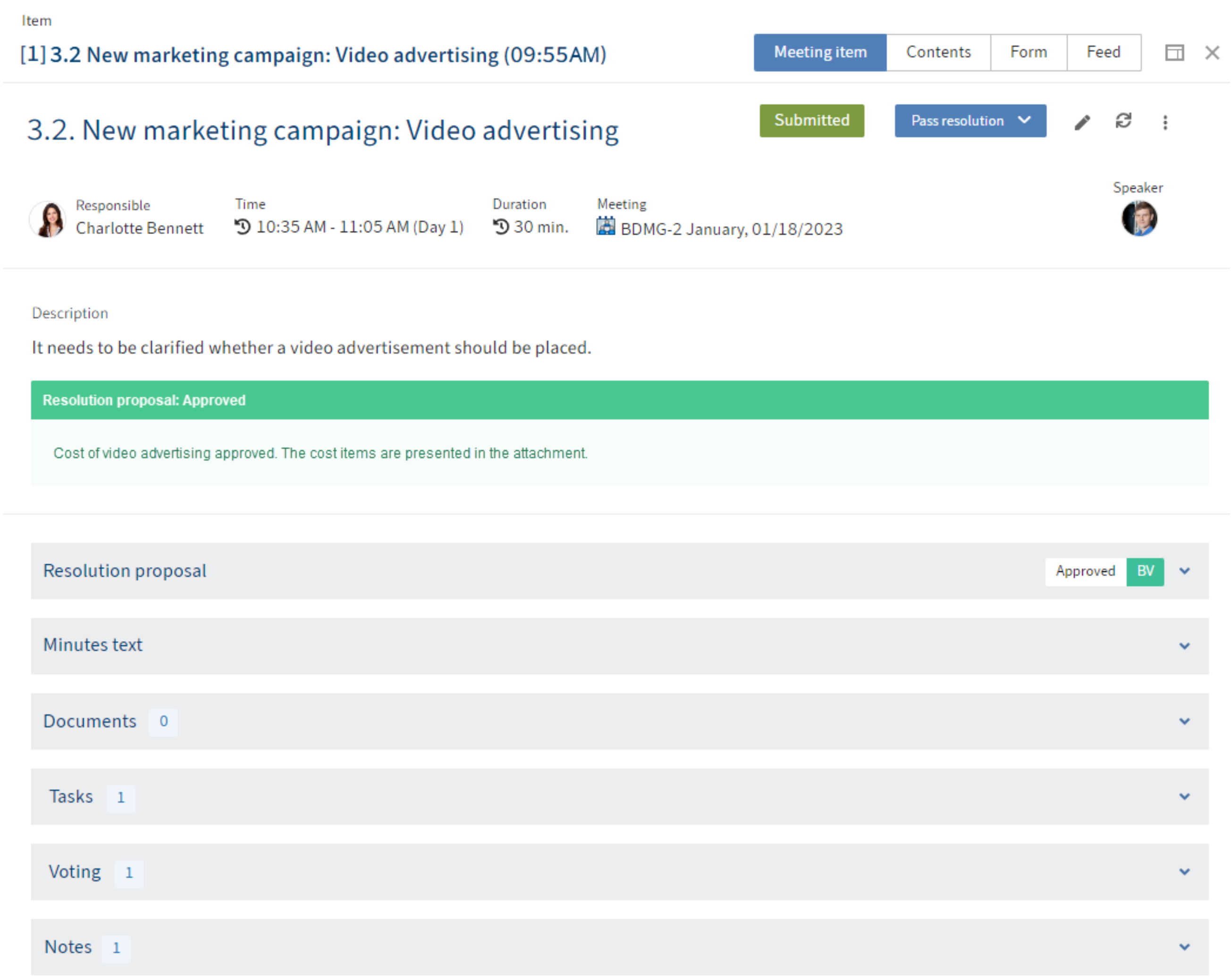
Roles	Permissions
Responsible Speaker Created by	People assigned one of these roles are granted full access to the item. Only they and organizers can create votes on the item detail page.
Minute taker	People assigned this role are granted access to the minutes text field for all items once the meeting has started.

Elements of an item

Each item has a form, a detail page ('Meeting item' tab), contents, and a feed.

> **Information**
>
> If you have been given a direct link to the standalone app, the agenda will take you straight to the detail pages of the item and you will not see the other elements.

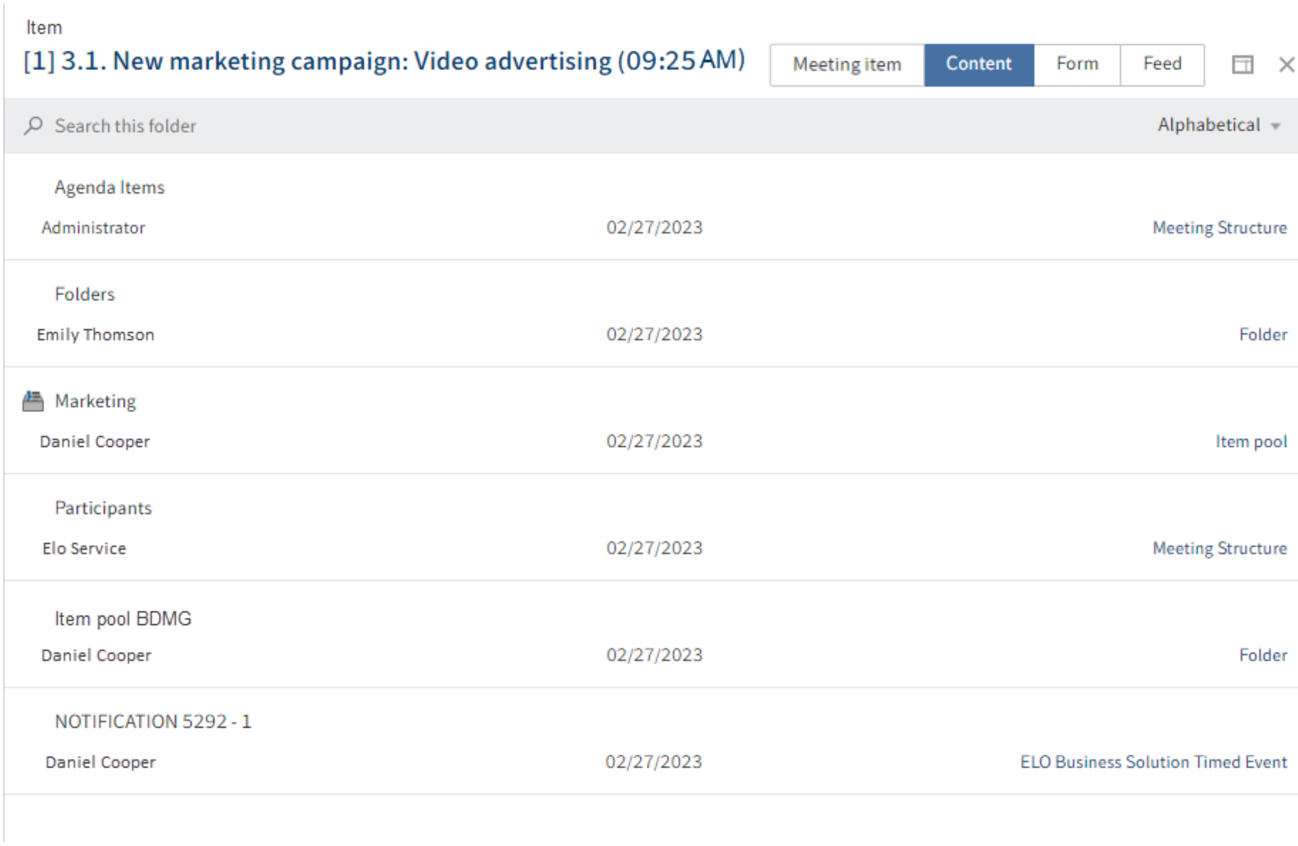
'Meeting item' tab



You will find the item detail page on the *Meeting item* tab. This page contains all information that has been recorded for the item so far. Depending on your permissions, you also have the option to add information.

For more information, refer to the Item detail page chapter.

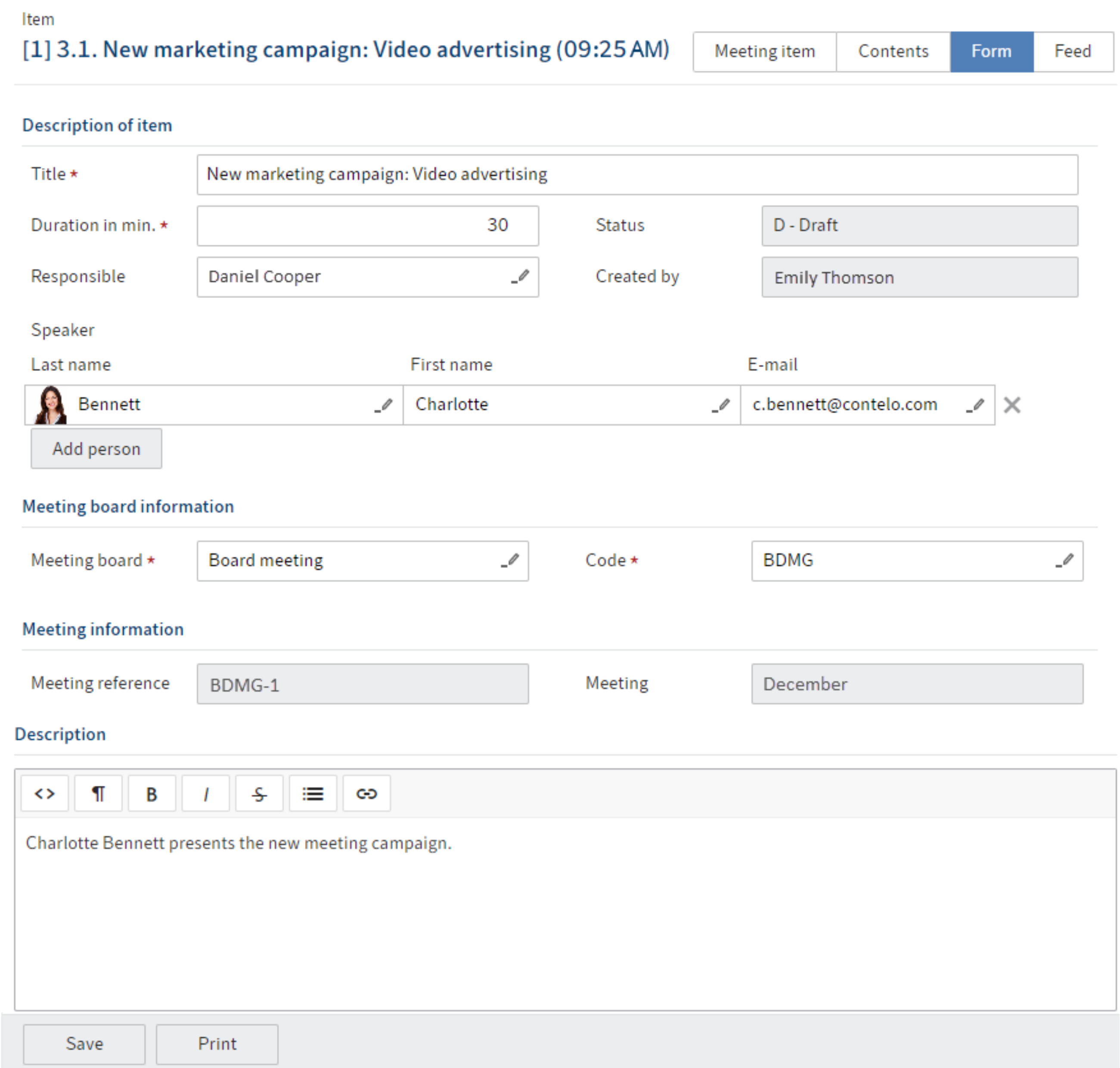
Contents



You will find the item entries on the *Contents* tab and in the repository:

- Documents: Documents are stored in the item folder. You can upload documents on the item detail page.
- Votes: Votes are created on the item detail page.
- Tasks: Tasks are created on the item detail page.
- Proposal: A folder is created for proposals.You can also store PDFs and attachments here.
- Notes: Notes are created on the item detail page. Personal notes are not stored in this folder, but in the user's personal area.

Form



Feed

Refer to the client documentation for information about the feed:

- Web Client
- Java Client

Prepare item

You can create items to be discussed during a meeting. An item can either be created in a meeting directly or in an item pool.

> **Information**
>
> You can create items for a meeting board even if you are not a member. In this case, you need to create the item in a item pool. Someone with the appropriate permissions must move it to the meeting board for you. For example, if you prepare an item for your supervisor (member of the meeting board), enter this person in the *Responsible* field. This means that your supervisor is authorized for both the agenda item and the meeting board and can register and submit the agenda item.

You then edit the item by adding documents or a proposal, for example.

If the item is in a item pool, you still have to register it for a meeting and/or submit it. The difference is that only you can view the contents of a registered item. As soon as you submit your item, the contents can be viewed by other members and organizers. This allows you to announce an item of business and schedule it for the agenda.

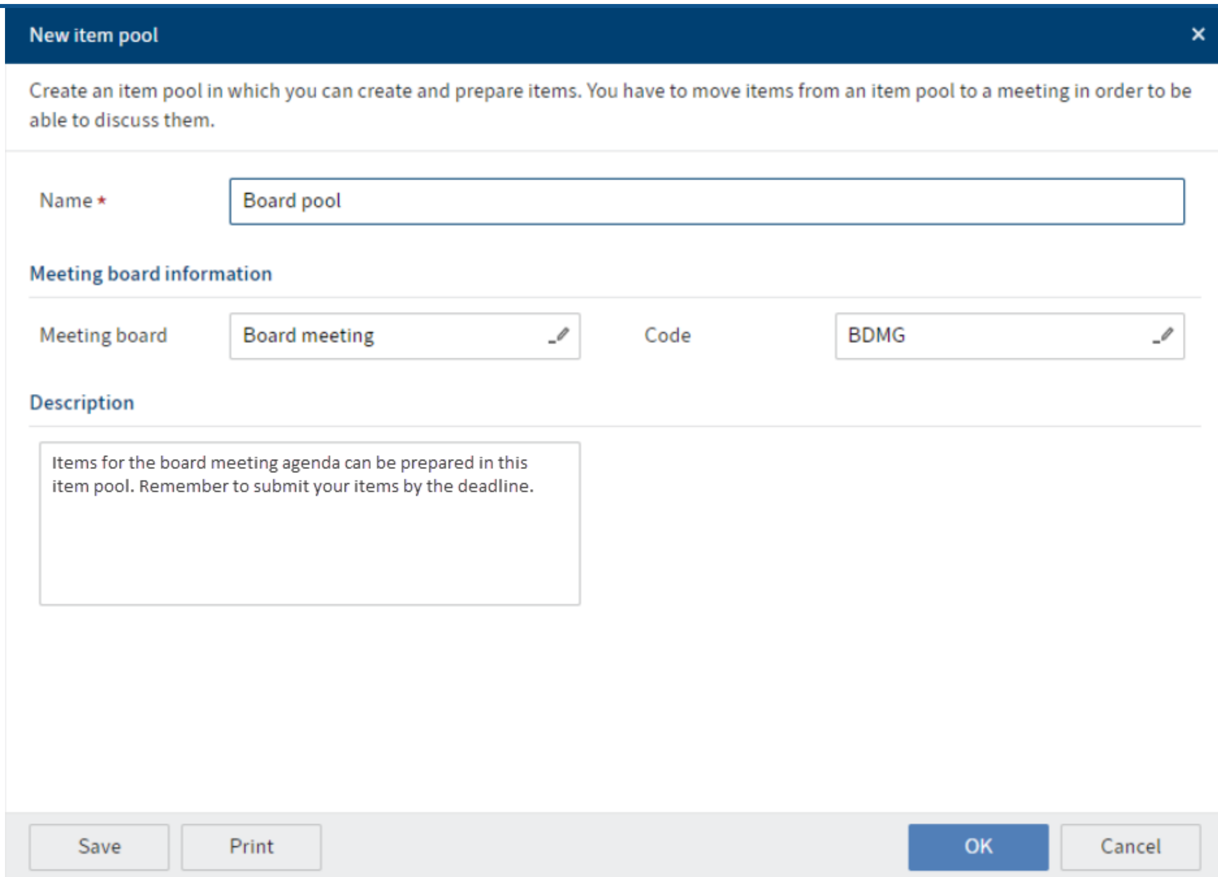
Create item pool

An item pool is a folder in which you can create and prepare items.

Item pools inherit the permissions of the folder they were created in. You may have to first create a folder with the necessary permissions using the *New folder* function (Ribbon > *New tab*).

Method

1. Select the location in the repository where you want to create the item pool.
2. On the ribbon, select *New > Meeting > New item pool*.



3. Complete the fields in the *New item pool* dialog box as required.

Field	Explanation
Name	The name should indicate what the item pool will be used for.
Meeting board information	If you select a meeting board here, the item pool will be linked to it. This link enables items to use the proposals that were defined for the meeting board.

4. Select *OK*.

Result

The item pool is created at the selected location. Everyone with permissions can create items in it.

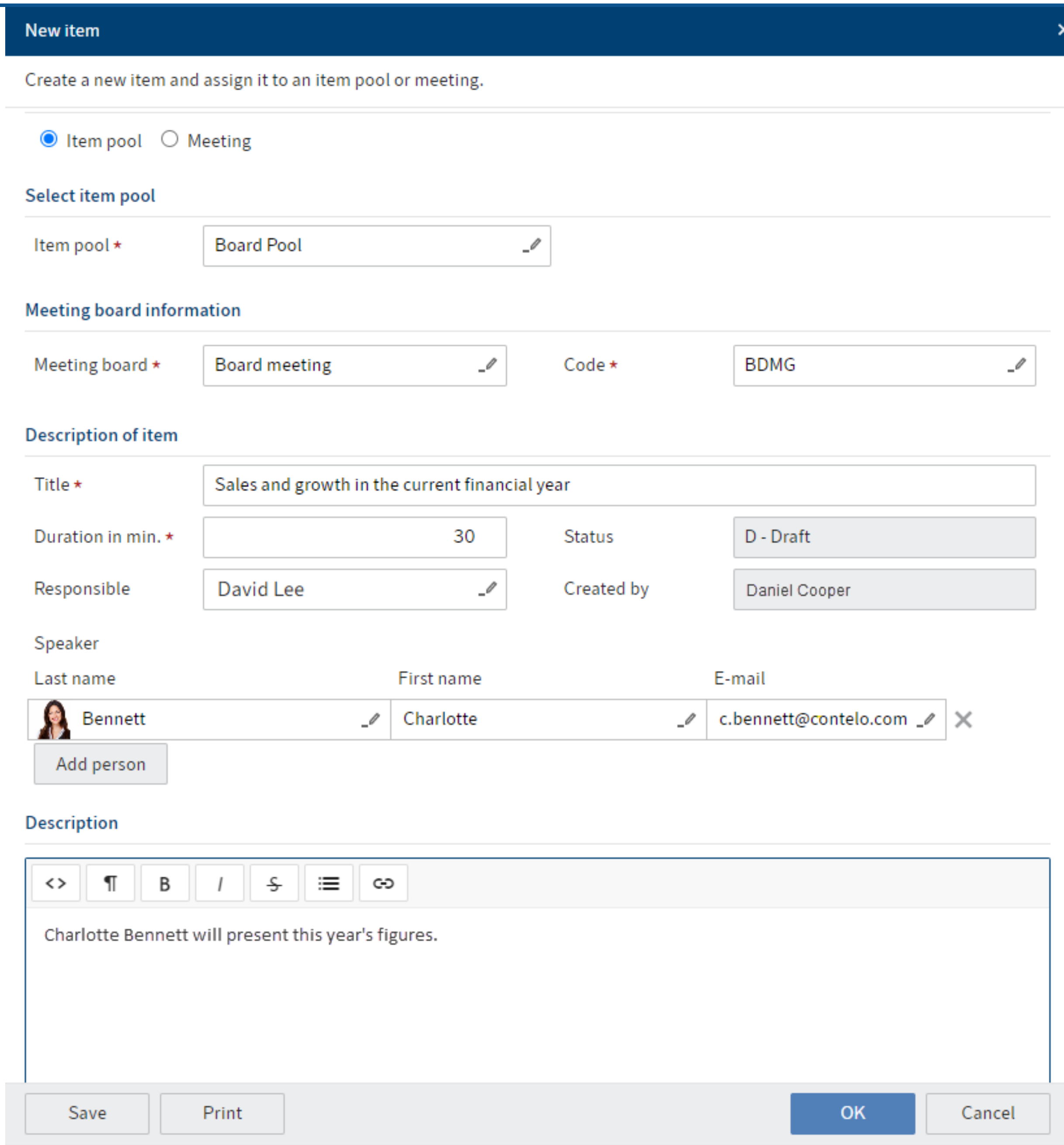
Create item

You can create an item to prepare it for a meeting.

An item can either be created in a meeting directly or in an item pool.

Method

1. Select the meeting or item pool in which you want to create the item pool.
2. Select *New > Meeting > New item*.



In the *New item* dialog box, the radio button is already selected to indicate that the item is assigned to an item pool or a meeting. Information about the item pool or the meeting is already entered. However, you can change this setting.

3. Complete the other fields as required.

Field	**Explanation**
Responsible	The person responsible is granted advanced permissions and can edit the item.
Speaker	The speakers are granted advanced permissions and can edit the item. You can select multiple people.

4. Select *OK*.

Result

The item is created in the meeting directly or in the item pool.

Outlook

- You can now prepare the item on the item detail page and prepare a proposal, for example.
- If the item is in the item pool, you must register it for meeting in good time so that it can be scheduled accordingly. The item then has to be submitted. Alternatively, you can also directly submit the item.

Prepare proposal

Depending on the meeting board settings, you may need to prepare a proposal before you are able to register the item for a meeting.

Proceed as follows:

1. Create the proposal.
2. Have the proposal approved.
3. Create a proposal PDF.

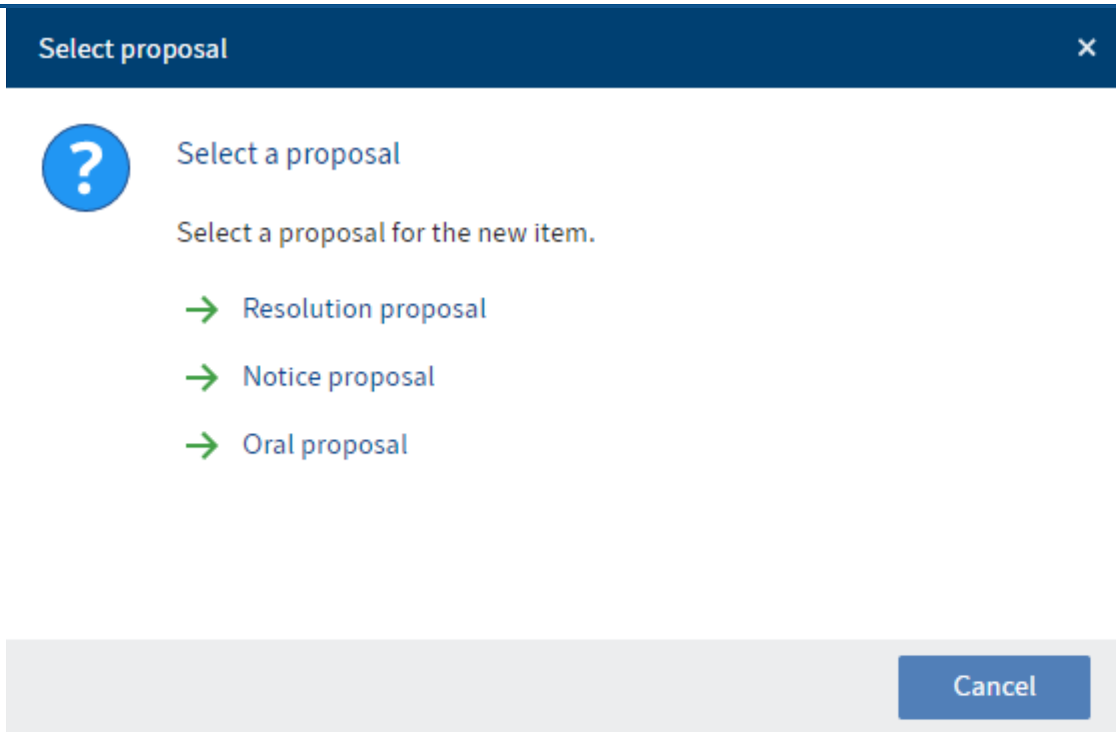
Create proposal

You can create a proposal for your item.

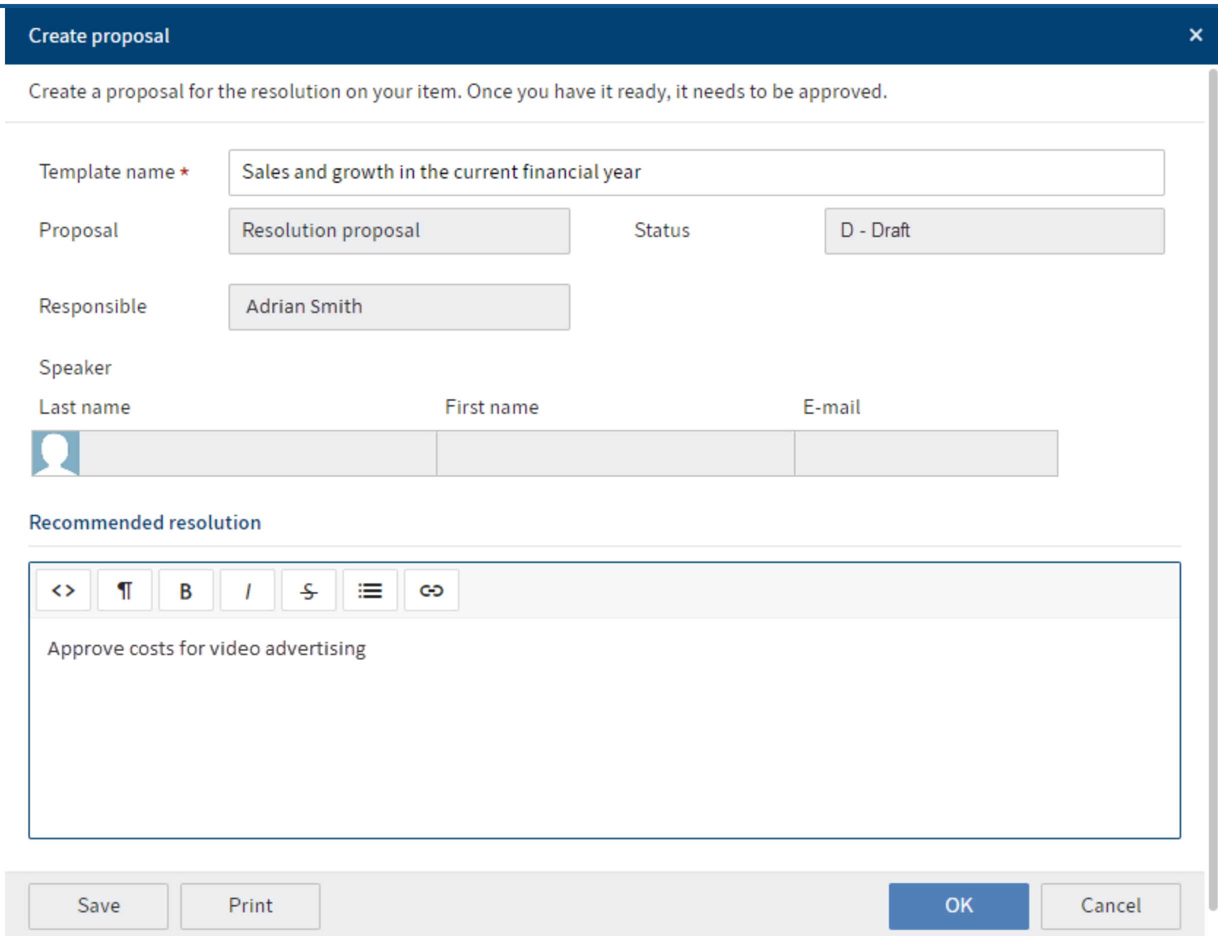
Method

1. Select the item.

2. On the ribbon, select *Meeting > Proposals > Create proposal*.



If multiple proposals are available for the meeting board you are creating the item for, select the type of proposal.



In the *Create proposal* dialog box, the proposal name is already entered. However, you can change this name.

3. Enter a recommended resolution. You can also edit this field later using the form.

4. Select *OK*.

Result

The *Resolution proposal* folder is created in the item folder.

The form in this folder contains the data you entered.

Depending on the proposal type, the folder can contain a Word document.

Outlook

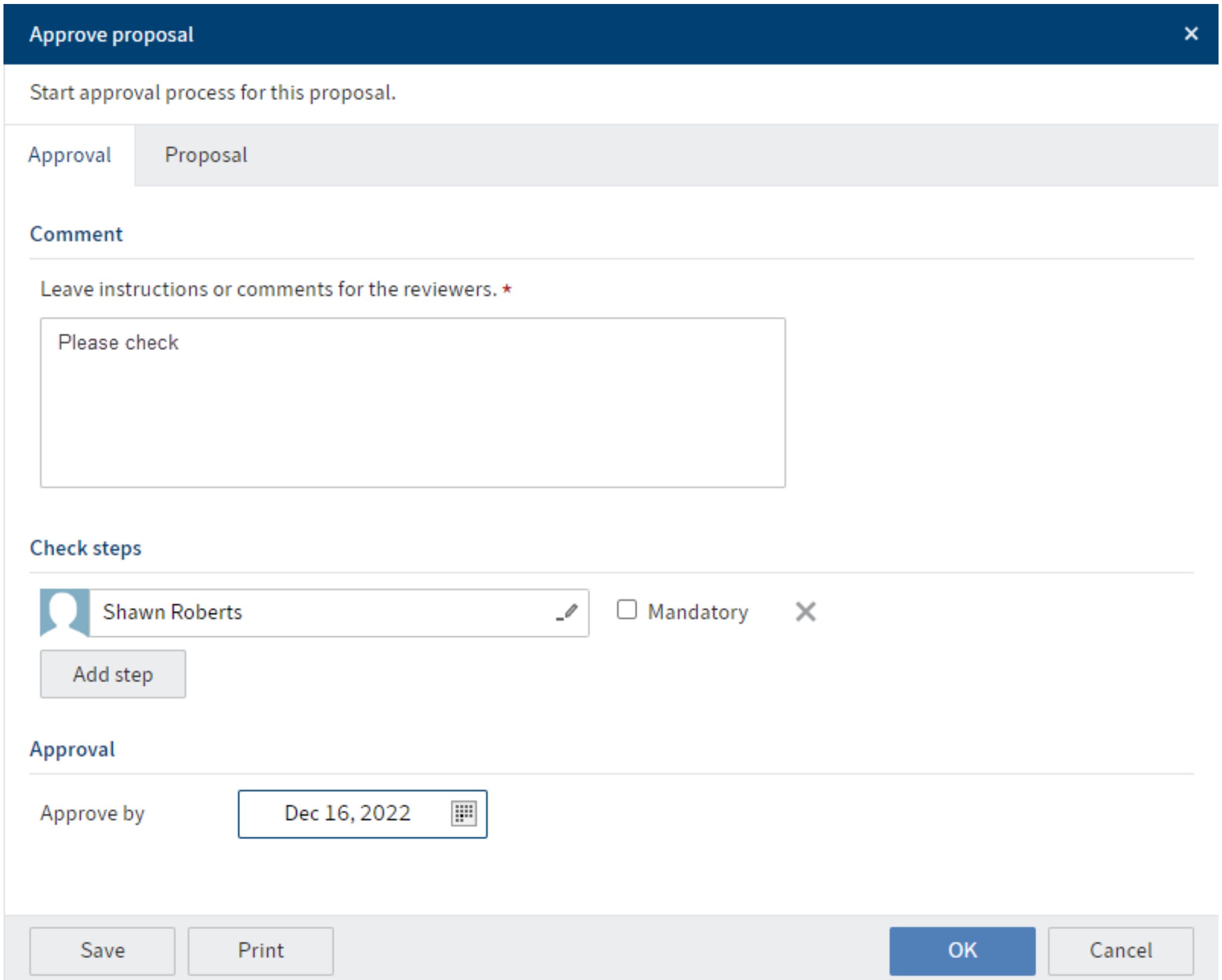
- You can edit the Word document with the standard functions.
- Once you have finished the proposal, you can submit it for approval.

Initiate approval

After you have finished preparing the proposal, you still need to have it approved.

Method

1. Select the *Resolution proposal* folder.
2. On the ribbon, select *Meeting > Proposals > Initiate approval*.



3. In the *Approve proposal* dialog box, enter a comment for the people you select to review the proposal.
4. Under *Check steps*, select who should approve the proposal.

   Optional: Enter a deadline for approval.

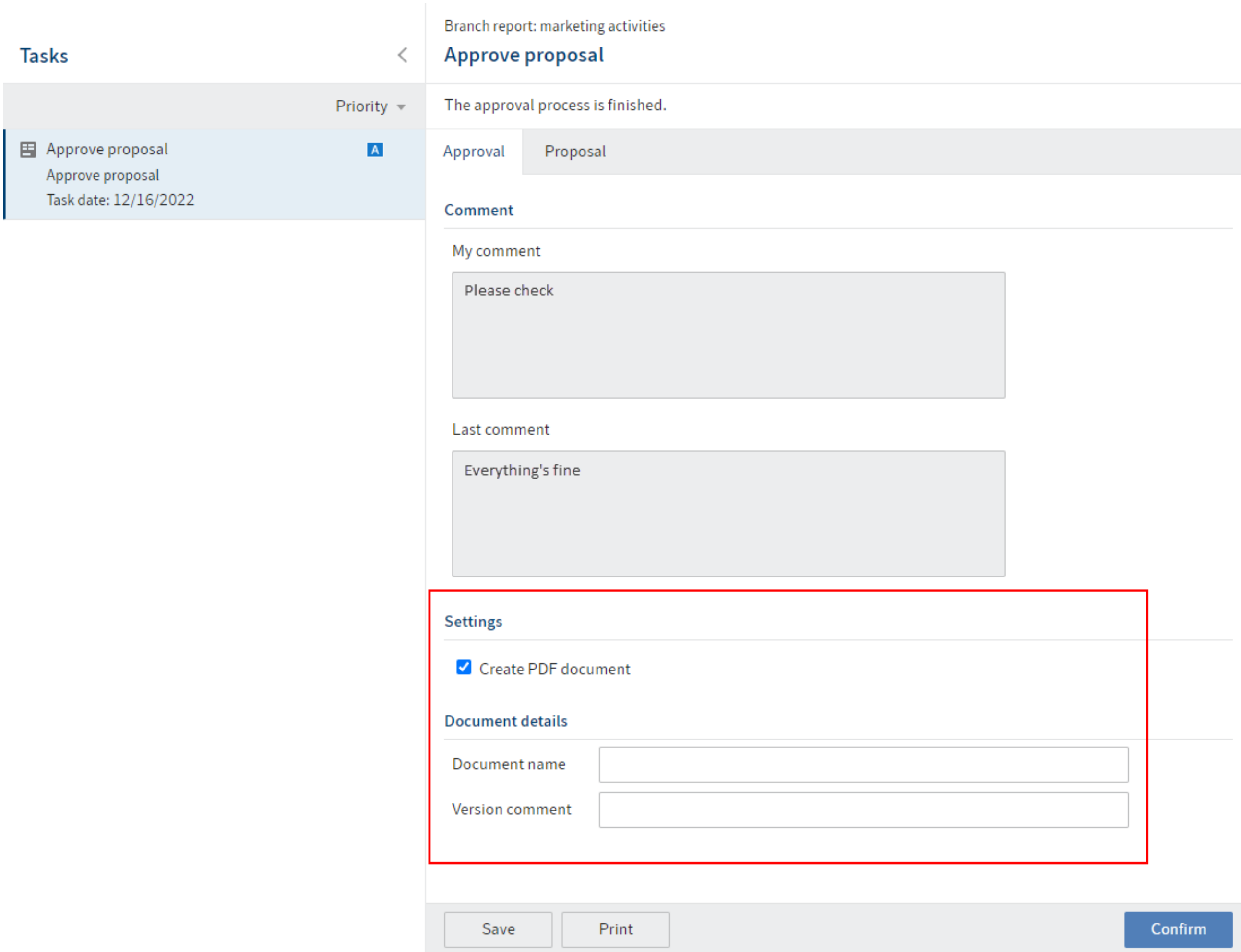
   The *Proposal* tab is just for overview purposes and cannot be edited.
5. Select *OK*.

Result

The reviewers are assigned a corresponding task.

Outlook

Once the approval has been granted, you will get a notification in your task area that your proposal has been approved. You can see the comment entered by the last reviewer in the *Last comment* box on the *Form* tab.



If you leave the *Create PDF document* option checked, you can immediately create a PDF document of the proposal. Enter a name for the document and an optional version comment. Once you select *Confirm*, the PDF document is created in the proposal folder.

If the proposal has attachments, a second PDF is created from the attachments.

If you did not create a PDF document, the task disappears from your task area. However, you can create a PDF at any time with the Create proposal PDF function.

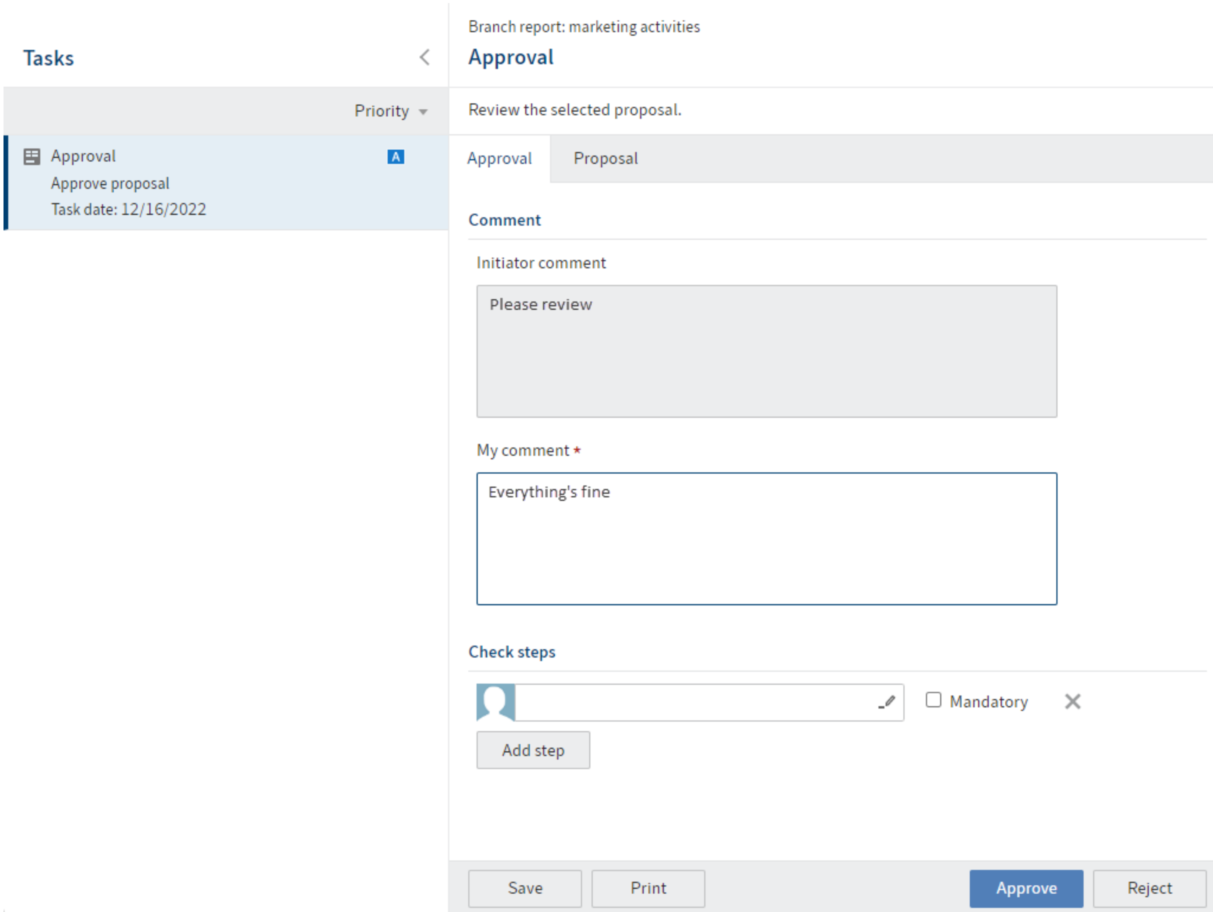
Approve proposal

If you need to approve a proposal, you will find the task in your task area.

Method

1. Select the *Approve proposal* task.
2.

Select the *Form* tab. On this tab, you will see the message from the person who assigned you the approval task.



You will find the recommended resolution on the *Proposal* tab of the form.

On the *Contents* tab, you will find the additional documents that were created.

3. As soon as you have finished reviewing the proposal, select *Approve*.

Result

The task disappears from your task area. The proposal is approved.

The person who triggered the approval process gets confirmation that the proposal has been approved.

Create proposal PDF

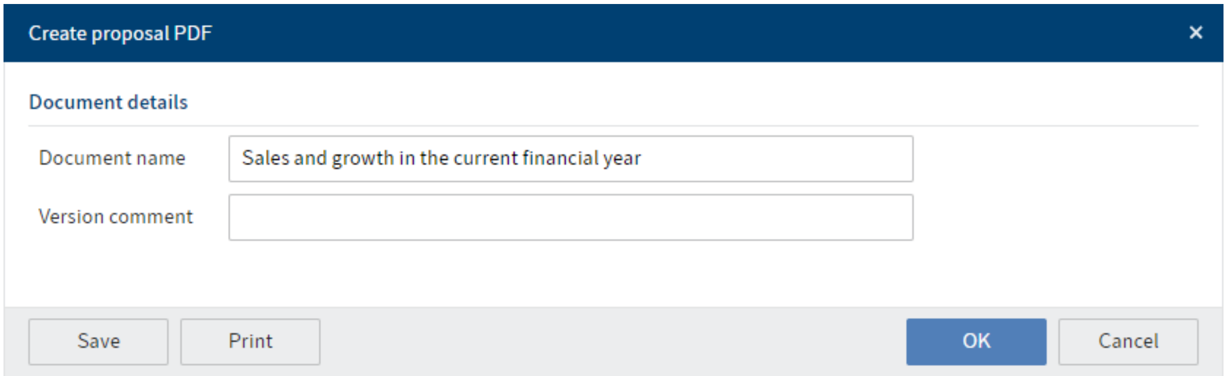
You can create a PDF of a proposal. This PDF is added to the meeting file and can be attached to the minutes.

Method

1. Select the proposal folder.

2.

On the ribbon, select *Meeting > Proposals > Create proposal PDF*.



In the *Create proposal PDF* dialog box, the document name is already entered. However, you can change this name.

You also have the option to enter a version comment.

3. Select *OK*.

Result

A PDF is created in the proposal folder.

The PDF consists of the following elements:

- Item metadata and recommended resolution from the form
- Contents of the Word document

If the proposal has attachments, a second PDF is created from the attachments.

Outlook

- You can repeat this step. Each time, a new version of the PDF is created, which becomes the new working version.
- The PDF document is added to the meeting file and can be included in the minutes.

Register item

You can register an item in advance of a meeting while you continue to edit it. This allows you to schedule the item for agenda consideration. The contents cannot yet be viewed via the meeting.

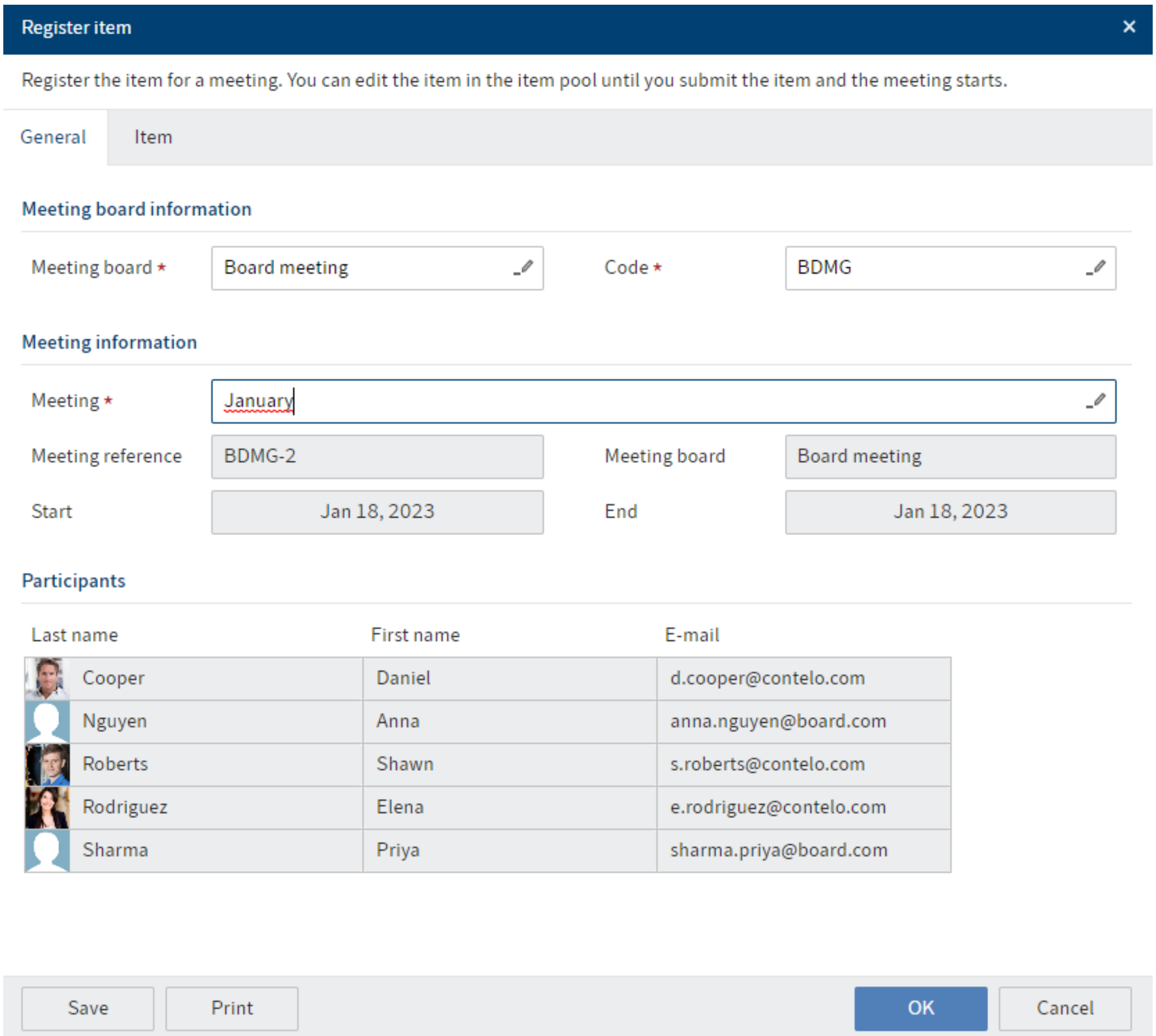
> **Information**
>
> Be aware of the registration deadline. Once the registration deadline has passed, you can no longer register items for a meeting.

Alternative

Submit item: If the meeting participants are allowed to see the contents of the item, you can submit it directly.

Method

1. Select the item.
2. On the ribbon, select *Meeting > Item > Register item*.



In the *Register item* dialog box, the meeting board is already selected.

3. Select the meeting you want to register an item for.

   You have the option to make changes to the item on the *Item* tab if you need to.

4. Select *OK*.

Result

The item is now registered for a meeting. The item remains in the item pool. The form for scheduling the item is visible in the meeting.

Outlook

- You can continue to edit the item on the item detail page.
- You can submit the item as soon as you want to share its contents with the meeting participants.
- You can also withdraw the item.

Submit item

You can submit an item that is in a item pool to a meeting. You can continue to edit the item, but the other meeting participants can already see its contents.

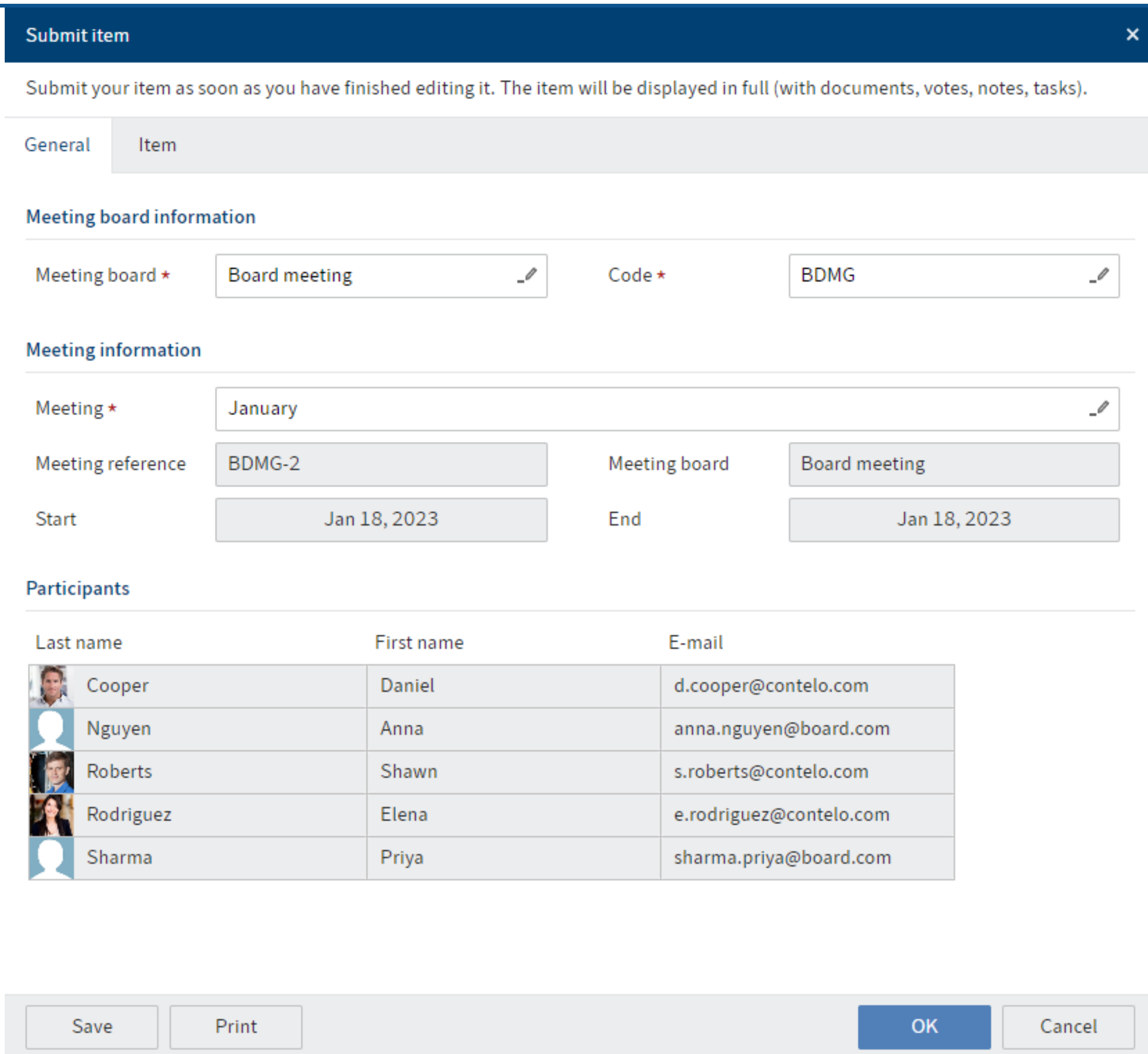
> **Information**
>
> Be aware of the registration deadline. Once the registration deadline has passed, you can no longer submit items to a meeting.

Alternative

Register item: If you don't want the meeting participants to be able to see the contents of the item yet, you can register the item and submit it later.

Method

1. Select the item.
2. On the ribbon, select *Meeting > Item > Register item*.



In the *Submit item* dialog box, the meeting board is already selected.

If the item is already registered, the meeting is also already selected. If not, select the meeting you want to submit your item to.

You have the option to make changes to the item on the *Item* tab if you need to.

3. Select *OK*.

Result

The item has now been submitted to the meeting. All its contents can be viewed by the meeting participants. A reference to the item remains in the item pool.

Outlook

- You can continue to edit the item on the item detail page.
- You can also withdraw the item.

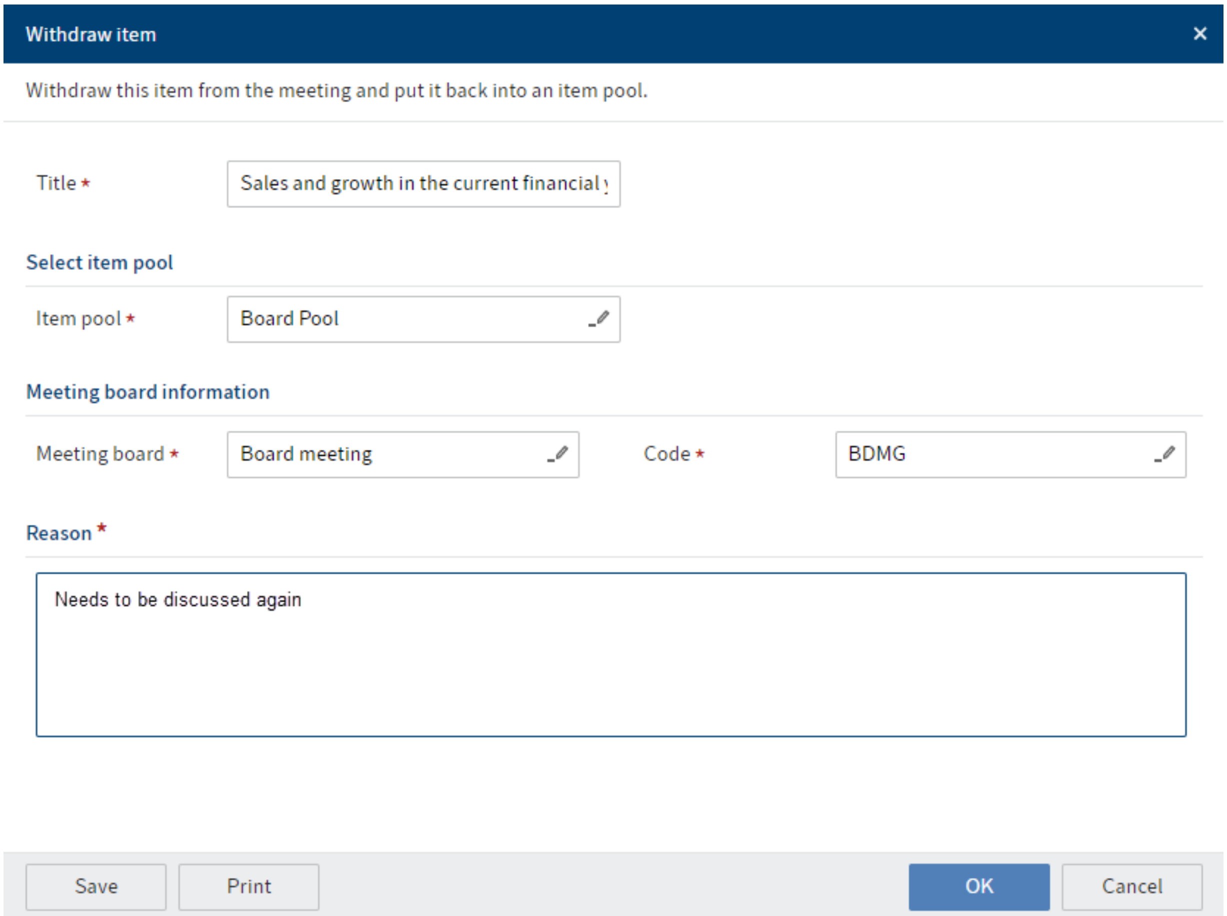
Withdraw item

You can withdraw an item from a meeting. It makes no difference whether the item was created in the meeting directly or in the item pool.

Method

1. Select either the item reference in the item pool or the item in the meeting.

2. On the ribbon, select *Meeting > Item > Withdraw item*.



3. In the *Withdraw item* dialog box, the item pool that contains the item reference is already selected. You can change this if you need to.

4. You must specify a reason for withdrawing the item.

5. Select *OK*.

Result

The item is in the selected item pool. If this is not the original item pool, there is still a reference in the original item pool.

Item detail page

The item detail page is where you record all information about an item before and after the meeting.

With the exception of proposals, you can enter all information on the item detail page.

You can access the item detail page as follows:

Via the item:

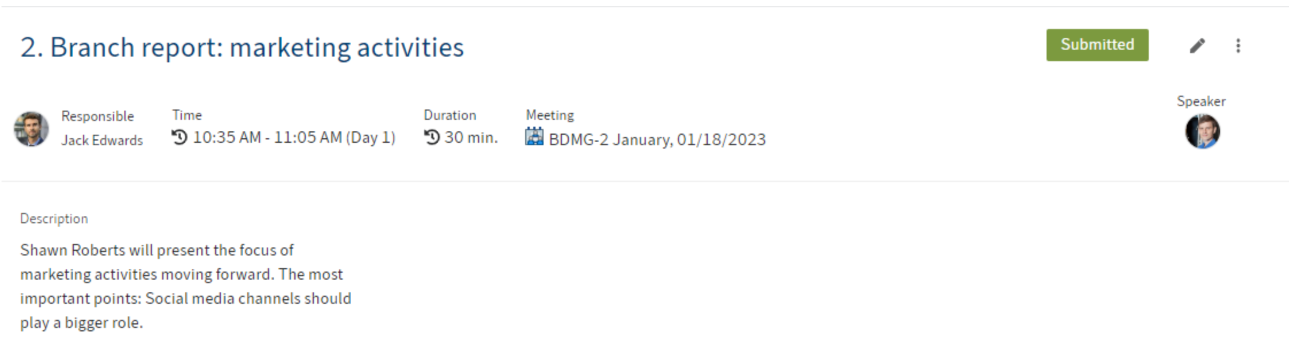
1. Select the item.
2. Select the *Item* tab.

Via the meeting:

1. Select the meeting.
2. Select the *Meeting* tab.
3. Select the item.

Header

The header part of the page contains the following information about the item:



Element	**Explanation**
Title	
Status	While you are preparing an item, it can have the status *Draft*, *Registered*, or *Submitted*. Refer to the Prepare item chapter to learn how to submit an item.
Responsible	
Time (duration)	Until an item has been submitted to an agenda, you will only see the scheduled duration here. Once it is on an agenda, you will see the actual time.
Meeting	This element is only displayed if the item has been assigned to a meeting.
Description	The item description that was entered in the form is displayed here.
Speaker	The person or persons presenting the item is displayed here.

Element	Explanation
Proposal status	If a resolution was passed, it is displayed here.

You can click the button with the pencil icon to edit some information about the item. The data that you can change corresponds to the information you entered in the form. Always use this function if you want the changes to be immediately displayed on the item detail page.

The menu with three dots takes you to the *Go to* function. This function enables you to go straight to the corresponding *Items* folder. This function only appears if you opened the item via a meeting.

Information for organizers

You can use the menu with three dots to move the item to another meeting.

As soon as an item has been discussed, use the *Pass resolution*/*Record decision* button. This option depends on the proposal type.

'Proposal' area

This area is displayed if a proposal was created for the item.

The following elements are displayed:

Element	Explanation
Status	You see whether the proposal status is currently *Draft*, *Approval initiated*, or *Approved*.
Recommended resolution	If a recommended resolution has been defined, the text is displayed here. You can change this text on the *Form* tab of the proposal folder.
Files	All contents of the proposal folder are displayed and can be opened from here.
Upload attachment	You can use the *Upload attachments* button to upload attachments to the item. Refer to the Upload files chapter for more information about attachments.

'Minutes text' area

Minute takers and organizers are authorized to write minutes. They can do so as soon as the organizer has started the meeting. For more information about starting a meeting, refer to the Meeting assistant chapter.

The minutes text for all items is recorded in the minutes.

'Documents' area

In the *Documents* area, you can access all the documents that have already been uploaded for an item.

Use the *Upload documents* button if you want to store additional documents.

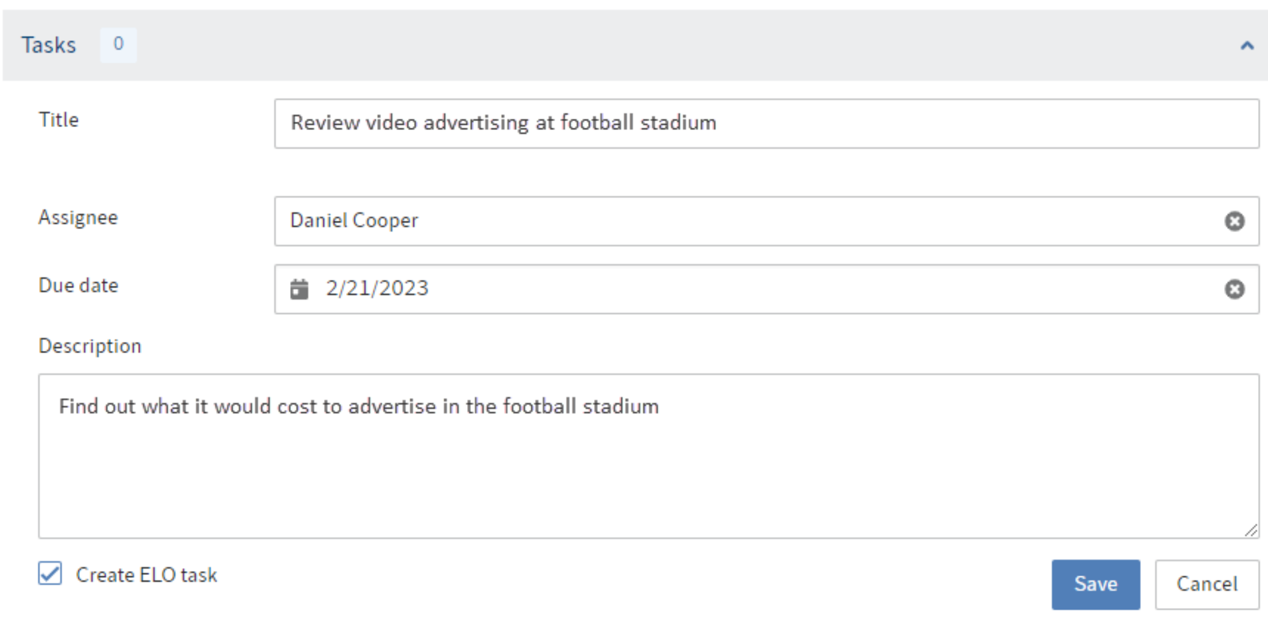
Refer to the Upload files chapter for more information about documents.

'Tasks' area

In the *Tasks* area, you can see all tasks relating to an item.

Create task

Click the *Create new task* button to create a task.



Field	Explanation
Assignee	In this field, you can select from a list of the meeting participants with an ELO account. Alternatively, you can type in the name of people without an ELO account.
Due date	If you select this field, a calendar opens in which you can select a date. If you create an ELO task, it will escalate once the due date is exceeded.

Field	Explanation
Create ELO task	If you have selected someone with an ELO account under *Assignee*, you can create an ELO task that will appear in that user's task area.

Edit task

If an ELO task was created, it will show up in the task area of the user whom the task has been assigned to. Once the ELO task has been edited, it is assigned the status *Done*.

If an ELO task was not created, the task is assigned the status *Done* using the check box next to the task.

A task can be closed oder deleted using the menu with three dots.

'Voting' area

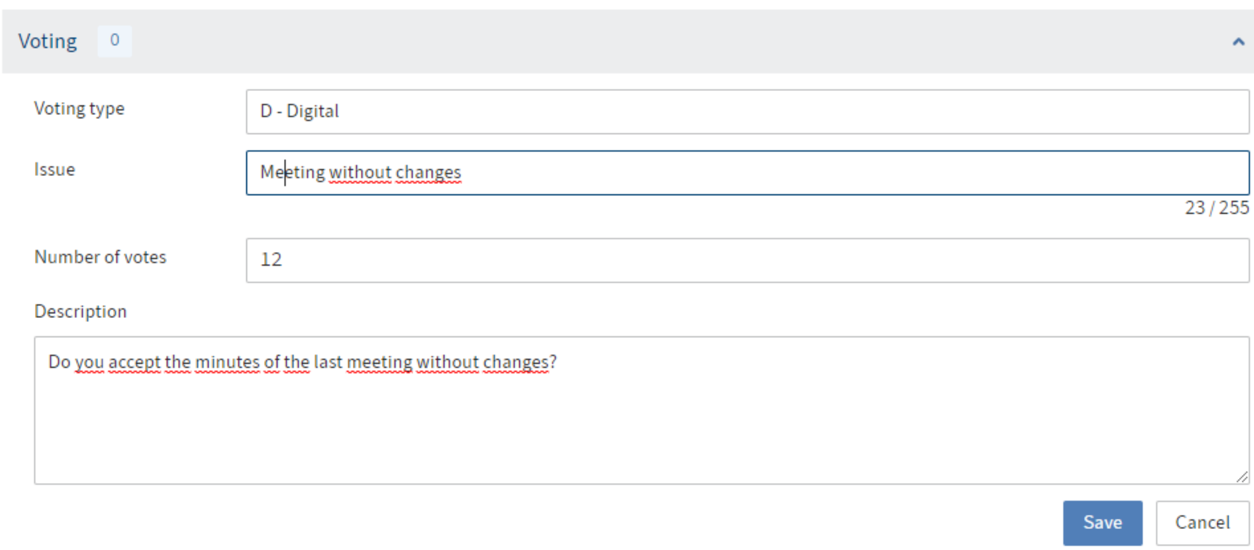
In the *Voting* area, you can see all votes relating to an item.

You cannot cast a vote until the vote has been started.

Create vote

Click the *Create new vote* button to create a vote.

Only organizers, speakers, and users responsible for an item can create votes.



Field	Explanation
Template	You have to select a template for additional fields to appear. With electronic voting, all members of the meeting board with an ELO account have the option to cast their vote themselves. If votes are cast by a show of hands, the person organizing the meeting enters the result.

Field	Explanation
Number of votes	As soon as the specified number of votes is reached, no more votes can be cast.

Hold vote

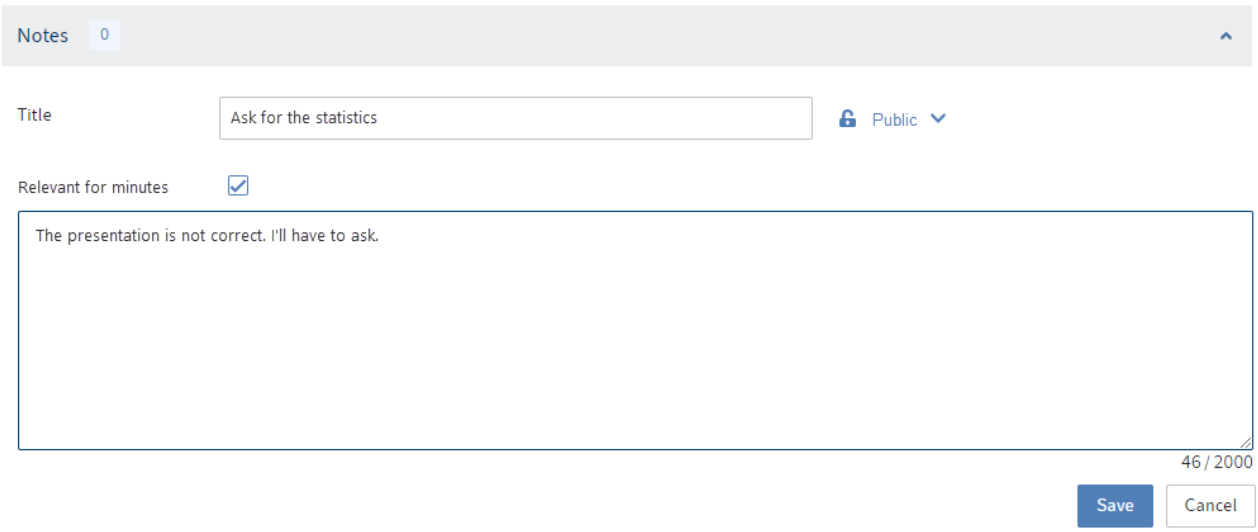
An organizer must start the vote. As soon as the maximum number of votes is reached, no more votes can be cast.

'Notes' area

The *Notes* area contains all public notes as well as your own private notes about an item.

Create note

Click the *Create new note* button to create a note.



There are the following types of notes:

Private	Only you can see this note.
Public	All people who can see your item can see this note.
Relevant for minutes	You can mark a public note as relevant for the minutes. In this case, it is included in the minutes.

You can edit all notes after they have been created. If you have marked a note as relevant for the minutes, you also have the option to undo this.

Upload files

You can upload files that are required for discussing an item.

In this context, there is a difference between documents and attachments. They are both files that are stored for an item. However, they are used differently.

Method

You can upload files in the app. For more information, refer to the Documents and Attachments chapters.

Alternatively, you can use the standard functions. However, make sure that you store the files in the correct place in each case as described in the subchapters.

- Insert file
- Document from template
- Drag-and-drop

The following table illustrates the differences between attachments and documents.

	Document	**Attachment**
Filing location	Item folder	Proposal folder
Appears in the meeting file	No	Yes

Documents

Documents are stored in the item folder. There must not be any other child folders at intermediate levels.

On the item detail page, you store documents by opening the *Documents* area where you will find the *Upload documents* button. Your explorer will open and you can select a document.

Attachments

Attachments are created in the proposal folder. There must not be any other child folders at intermediate levels.

On the item detail page, you store attachments by opening the proposals area where you will find the *Upload attachments* button.

You can then create a PDF from all the attachments using the Create proposal PDF function.