Notate Meetings for BlackBerry

Make meetings easy and productive

User Guide – version 1.1

What is Notate Meetings for Blackberry?

A shared virtual meeting space for every meeting keeps all the team's information in one place, easy for everyone to access.

Notate Meetings Features

- Notate Meetings helps you make meetings more productive by keeping all of the meeting information in one place where everyone can collaborate.

- PRE-MEETING - Shared meeting space where users can see the agenda and make notes prior to the meeting, to help the meeting be more productive.
- DURING MEETING - Everyone can take notes in the shared meeting space. Anyone can add action items and assign them to attendees.
- POST-MEETING - Follow up on past action items and see what still needs to be done. Easily see the notes and action items from the last recurring meeting.

- Meetings integrates with Outlook and Notate so attendees can easily follow up on assigned action items, and completed action items will be reflected in the Meetings app.

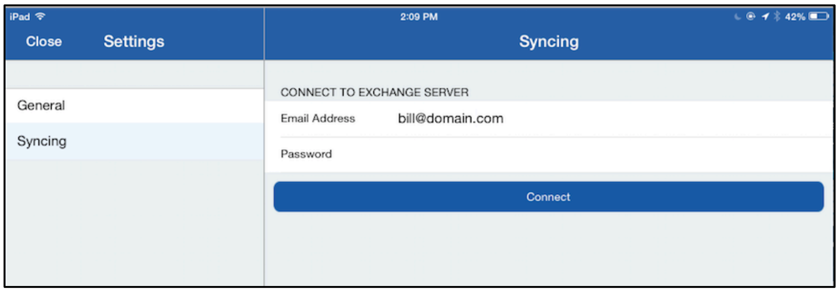
- COMMUNICATE CLEARLY - When you assign an action item to someone, they will get an email letting them know about the item, and if they are a Meetings user, they will also see the action item in their Outlook or Notate to-do list.

- PUBLISH MINUTES EASILY - With just a tap, at the end of the meeting all the meeting information including attendees, agenda, notes, and action items will automatically be emailed to all meeting attendees.

- COLLABORATE WITH PEERS - A shared meeting space increases productivity by helping workers prepare before the meeting, and to follow up with results after the meeting.

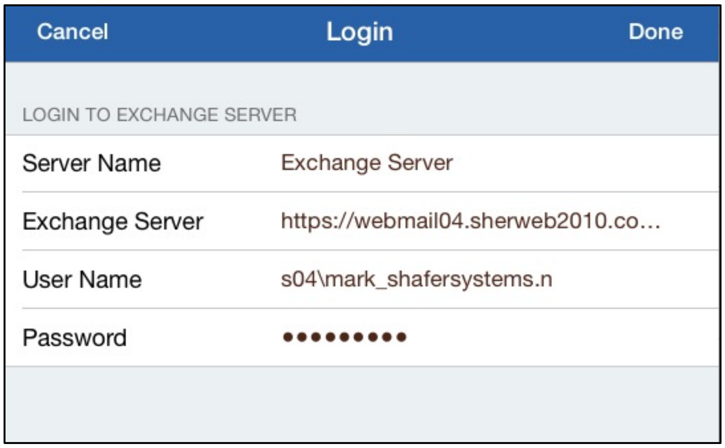
Exchange Configuration

After entering in your access key and information, your email address should automatically be prefilled. To complete the sync set-up, enter your Email password and tap connect. Synchronization will begin immediately following authorization.



Email Address bill@domain.com
Password

In some cases, you may be requested to enter your domain user name and the Exchange Server EWS URL to complete the process.



Server Name Exchange Server
Exchange Server https://webmail04.sherweb2010.co…
User Name s04\mark_shafersystems.n
Password •••••••••

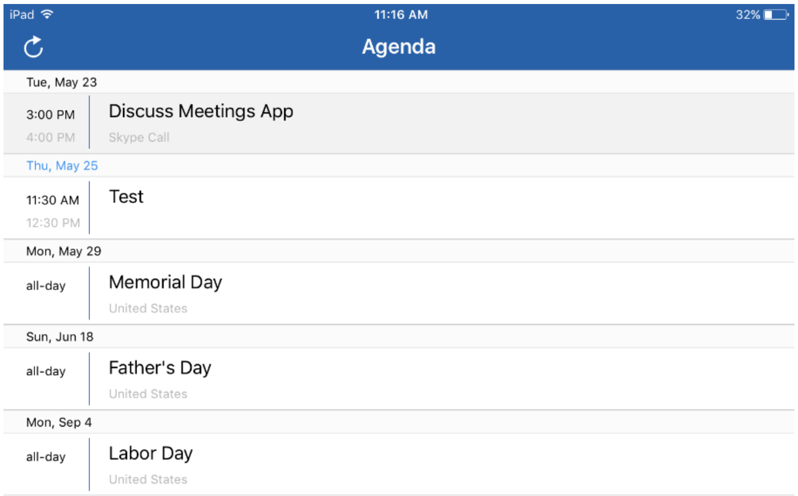
How Shared Workspaces Operate

It’s important to understand how Meetings creates shared workspaces for users. The shared workspaces are stored securely on the Exchange server. In order for a shared meeting workspace to be set up for a user, the user must open the Meetings app and open the meeting workspace. Before the user opens the meeting, the shared workspace is not set up for them, so they will not be able to be able to see tasks that have been assigned to them in Outlook.

However, it is not necessary for all attendees to use the Meetings app in order to still benefit. Even if an attendee doesn’t use the meetings app, action items may still be assigned to them, and they will get an email notifying them about the task, and they can also receive the meeting minutes emailed by one of the other attendees of the meeting.

Agenda View

Agenda view shows any events scheduled. By tapping on an event, you will be taken to the meeting and shown the meeting information. By tapping the back arrow, you will be taken back to the Agenda view.



Tue, May 23

3:00 PM
4:00 PM
Discuss Meetings App
Skype Call

Thu, May 25

11:30 AM
12:30 PM
Test

Mon, May 29

all-day
Memorial Day
United States

Sun, Jun 18

all-day
Father's Day
United States

Mon, Sep 4

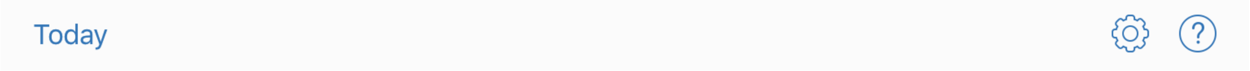
all-day
Labor Day
United States

Date Range

In Agenda view, you can navigate back to the first of the month, and can go to future dates as far as the next year.

Today

By tapping the word Today at the bottom of the agenda, you will be taken back to the current date.

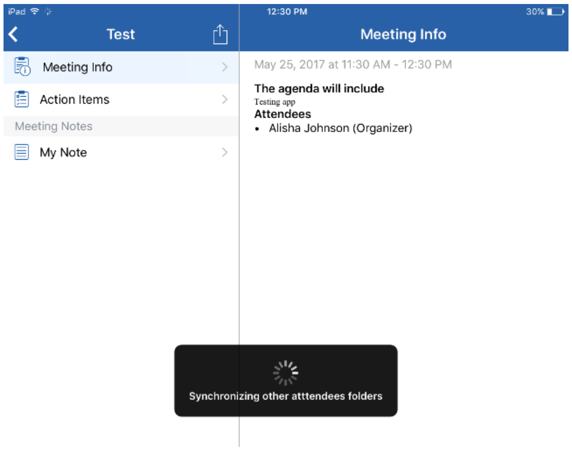


Recurring Meetings

Recurring meetings will be shown on the days that they occur (Ex. Every day, every two weeks, once a month).

Syncing

When you tap on a meeting, your folder and notes will be synchronized with any other participants. You will be able to see their notes and they will be able to see yours. Any edits to action items will also be synchronized amongst the participants.


iPad
12:30 PM
30%
Test
Meeting Info
Meeting Info
Action Items
Meeting Notes
My Note

May 25, 2017 at 11:30 AM - 12:30 PM

The agenda will include

Testing app

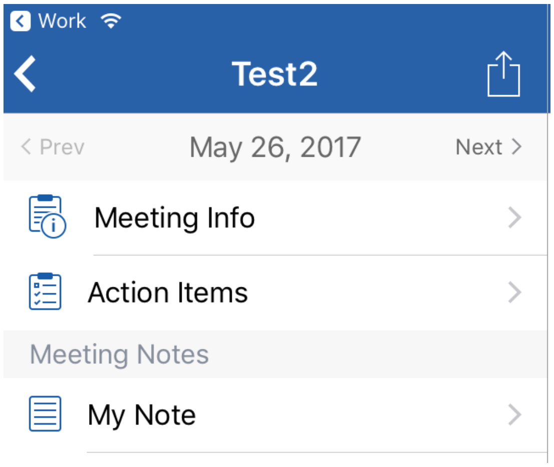
Attendees

- Alisha Johnson (Organizer)

Synchronizing other atttendees folders

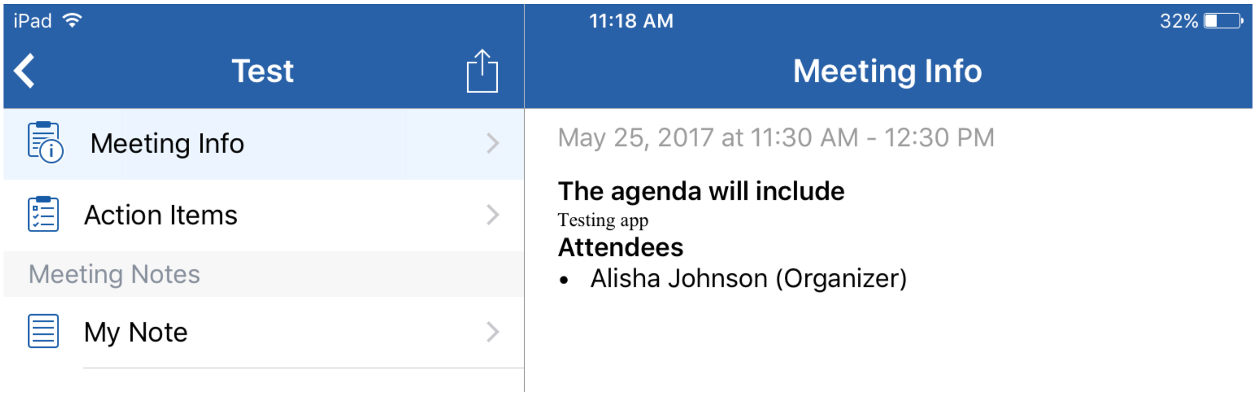
Navigating Recurring Meetings

When you are in the meeting, you can also go forward and back to recurring meetings. There will be a next button and a previous button that allows you to scroll among recurring meetings.


Work
Test2
< Prev
May 26, 2017
Next >
Meeting Info
Action Items
Meeting Notes
My Note

Meeting Info

Meeting information includes any notes on the agenda, and the attendees, including the organizer and any participants. The date, time range and any other specifics (Skype call, etc.) are also included.


iPad
11:18 AM
32%
Test
Meeting Info
Meeting Info
Action Items
Meeting Notes
My Note

May 25, 2017 at 11:30 AM - 12:30 PM

The agenda will include

Testing app

Attendees

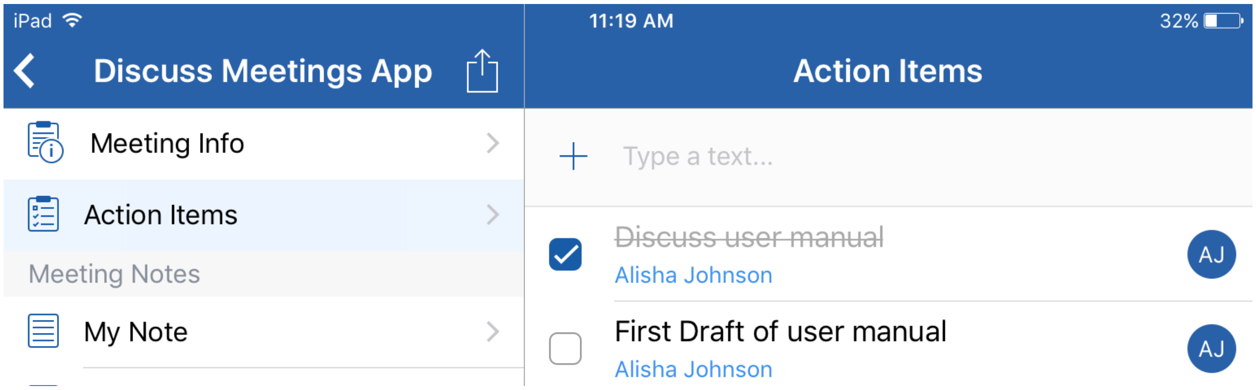
- Alisha Johnson (Organizer)

Action Items

Action items are items that can be created and assigned to attendees, and works like a checklist.

Creating Action Items

To create an action item, simply tap on Action Items, and then tap the plus symbol and type any text. When finished, tap done.

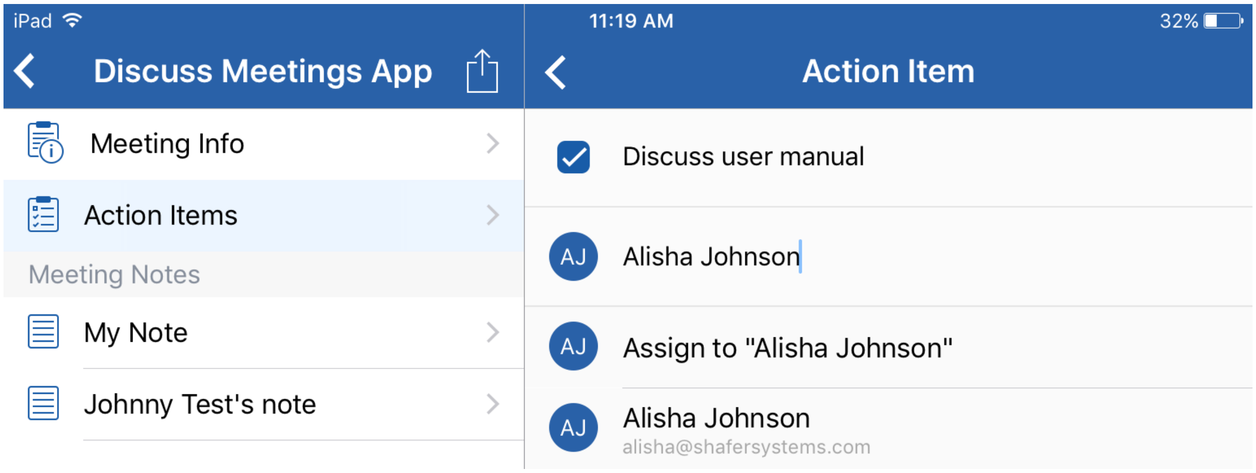

iPad
11:19 AM
32%
Discuss Meetings App
Action Items
Meeting Info
Action Items
Meeting Notes
My Note
+
Type a text...
AJ
AJ

☑ ~~Discuss user manual~~ Alisha Johnson

☐ First Draft of user manual Alisha Johnson

Assigning Action Items

To assign an action item, tap on the action item, and then tap on the name of the person it is currently assigned to. You can then type a name or select a name from the drop down list, if available. The item is then reassigned to someone else.


iPad
11:19 AM
32%
Discuss Meetings App
Action Item
Meeting Info
Action Items
Meeting Notes
My Note
Johnny Test's note

☑ Discuss user manual

AJ Alisha Johnson

AJ Assign to "Alisha Johnson"

AJ Alisha Johnson
alisha@shafersystems.com

What happens when an action item is assigned

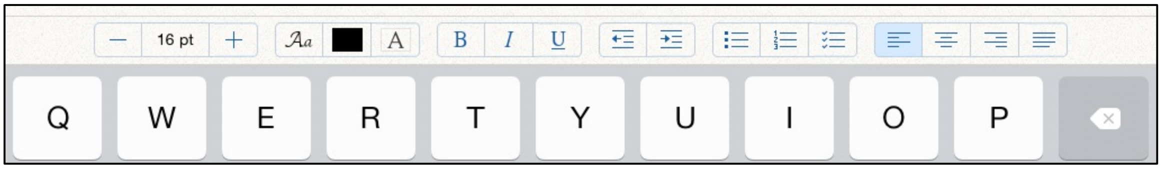
When an action item is assigned to a person, the assignee will receive an email, and the action item will be copied to their Outlook tasks and Notate tasks.

When an action item is completed remotely in Outlook or Notate

When an action item is completed and checked off in either Outlook or Notate, the action item will appear as being crossed off the list in the Notate Meetings app.

Note Editor Features

A note in the Notate Meetings app can be edited using the note editor. This editor has several features.


16 pt
Aa
A
B
I
U
Q
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R
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Y
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P

Font Formatting

To bring up the formatting menu, tap anywhere in the body of the note. Press the up or down arrow to raise or lower the font size respectively. You can also press on the Font point size button and bring up a menu of sizes to choose from.

Font colors & text highlighting

Font colors can be select from the middle menu item displaying all the color options available for text. The Meetings app also supports a text highlighting option by selecting the A button prior to starting text input, or through the use of selection of text.

Font styles

The Notate Meetings app has many of the same formatting features as the most popular word processing applications. Select the text to stylize and tap the **Bold**, **Italics**, or **Underline** buttons to add style changes to your note.

Alignment and indentation

Alignment options include **Left**, **Center**, **Right**, and **Justified**. Select the text you wish to align and select the corresponding alignment icon in the formatting menu.

To indent a single line, select anywhere on the line or paragraph and tap the **Increase** or **Decrease Indentation Button**. The same action can be done for a paragraph by selecting an entire paragraph.

Bullets

Tapping the bulleted list icon from the formatting menu will add bullets to the selected line of text by default. Tapping the **Return** button on the keyboard will add a new bullet point. Use the indentation buttons to create lists. With the Meetings app, you can create bulleted, numbered, and check lists. The Meetings app does not currently support nested lists, although lists may be indented.

Other's Notes

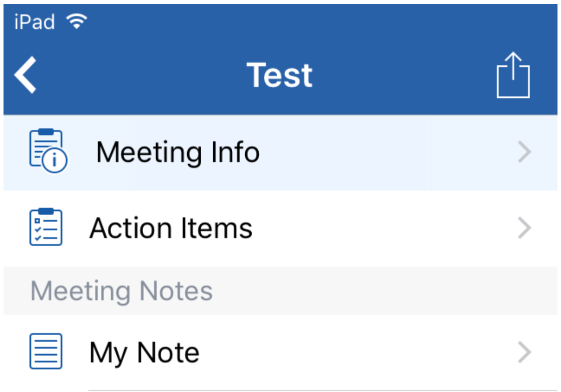
Other attendees' notes can be viewed by tapping on their note under Meeting Notes. Their notes will automatically sync and update if they make any changes to it, and will be visible for any other attendees to see. Their notes will also be exported in the Meeting Minutes.

File Sharing

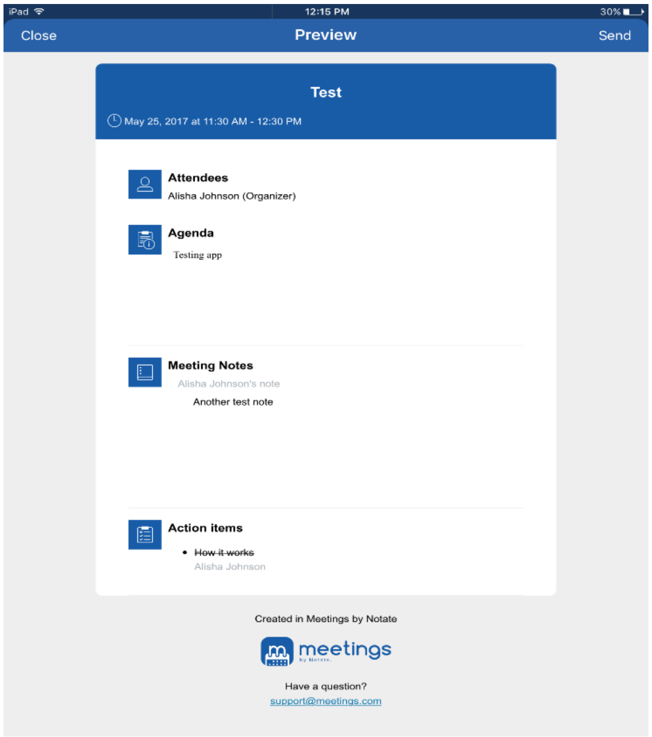
In a later release, you will be able to share files amongst participants in the meeting.

Sending Meeting Minutes

To send meeting minutes, tap on the icon (A box with an arrow pointing outside). This will create a PDF file of the meeting minutes.



A preview will be shown. When finished, tap send, which will bring up an email with the option to input any email addresses needed. Information in the PDF includes attendees, agenda notes, meeting notes and action items.



Test

May 25, 2017 at 11:30 AM - 12:30 PM

Attendees

Alisha Johnson (Organizer)

Agenda

Testing app

Meeting Notes

Alisha Johnson's note

Another test note

Action items

- ~~How it works~~
  Alisha Johnson

Created in Meetings by Notate

meetings

Have a question?

support@meetings.com

Notate Integration

The Meetings app is integrated with Notate. When meeting notes and action items are opened in Notate, more advanced features become available.

Notes

When Meeting notes are opened in Notate, they become searchable and also allow for deeper editing (Ex. Scrolling and zooming, more text editing features, etc.).

Action Items

When action items are opened in Notate, reminders and due dates are available. If an action item has been completed and checked off in the Meetings app, it will also show as being checked off in Notate.

Support and Feedback

It’s easy to get in touch with us to request product support or to offer suggestions and other feedback. Simply tap the gear icon on the app toolbar and press the “Send Feedback” button, or email us at support@shafersystems.com.