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QuickMinutes

A quick guide for UCC staff



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IT SERVICES

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What is QuickMinutes for?

In the UCC context QuickMinutes is to be used to help organise and manage large scale committee meetings.

Regularly scheduled meetings with detailed agendas and associated documents can be and should be easily set up and managed using QuickMinutes.

What is it not for?

QuickMinutes is not for your one to one meetings, or smaller team meetings. Outlook or MS Teams work best for smaller groups especially where there might be a need for all meeting participants to work and edit files.

QuickMinutes is not for project documentation. Collaborative projects and associated documentation should be made available to a project team either through NAS, MS Teams, or a Google Team Drive. For more information on the available storage options see <https://www.ucc.ie/en/it/storage/>.

LOGIN PAGE

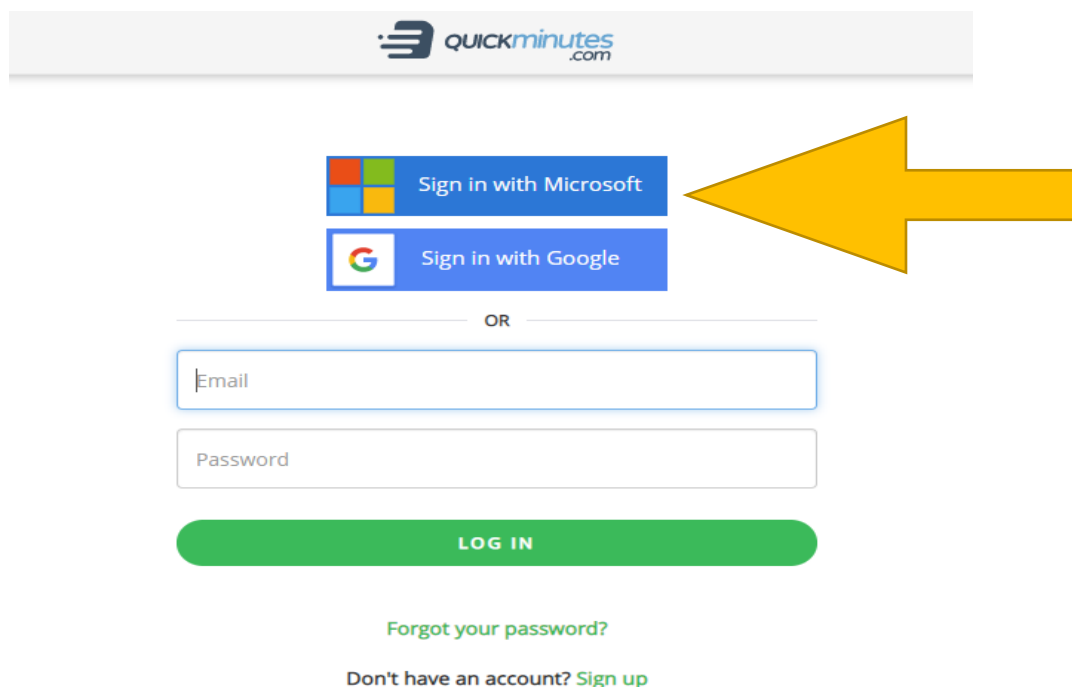
Go to <https://quickminutes.com/login>

UCC staff can access QuickMinutes using their Microsoft Office 365 account

Figure 1: QM login page

Log In

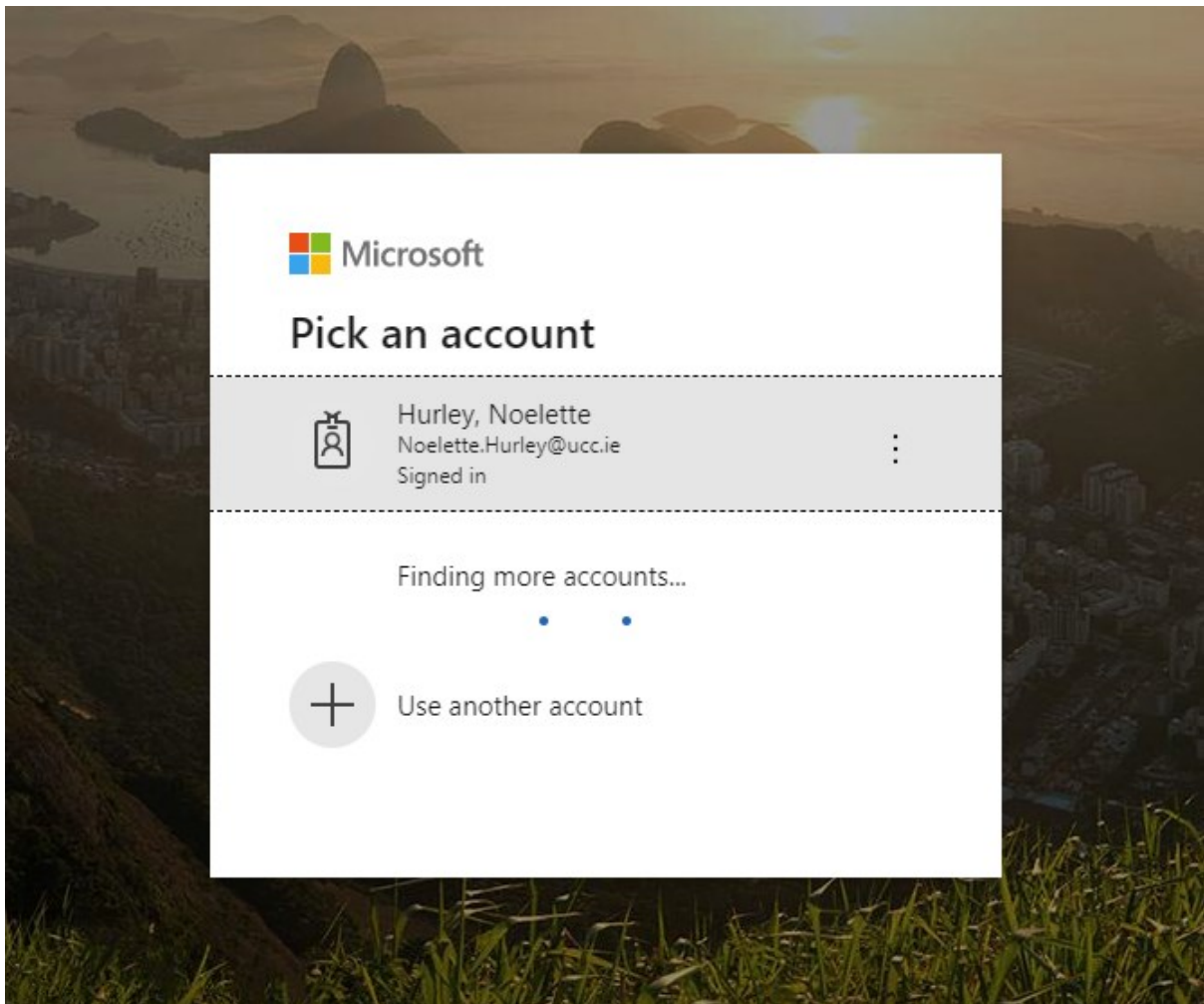
Click the sign in with Microsoft.



The screenshot shows the QuickMinutes login interface. At the top is the QuickMinutes logo. Below it are two social login buttons: 'Sign in with Microsoft' and 'Sign in with Google'. A large yellow arrow points to the 'Sign in with Microsoft' button. Below these buttons is an 'OR' separator, followed by an email input field, a password input field, and a green 'LOG IN' button. At the bottom, there are links for 'Forgot your password?' and 'Don't have an account? Sign up'.

Log in Credentials

Use your UCC email address, you will then be redirected to our sign in page. Enter your UCC password.



Create a Committee

Step 1: Click the 'Create Committee' button on the "My Committees" page.

Step 2: Enter the Committee name – Prefix your committee name with your department. You may have committee members that are on several 'Operations Committee'

Step 3: Select the Organisation that the Committee belongs to – **University College Cork**

Step 4: Enter the Committee Description.

Step 5: Click 'Create'.

Step 6: Now the Committee has been created. Please note that invitations will not be sent to members until you 'Create' your first 'Meeting'.

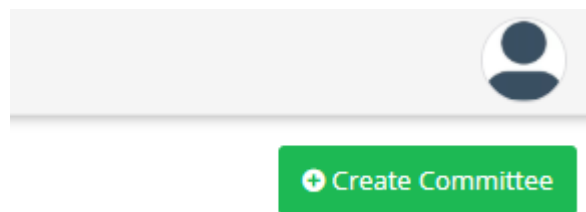


Figure 2: create committee button

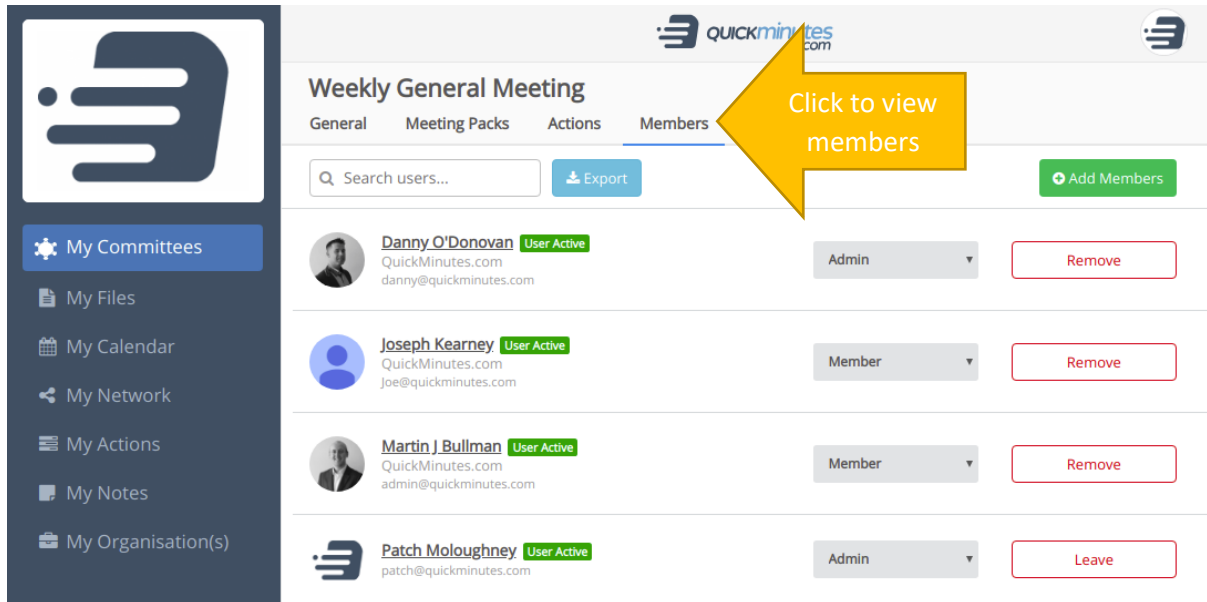
A screenshot of a "Create Committee" form. The form has a dark blue header with the title "Create Committee" and a close button (X). On the left side, there are three icons: a group of people, a building, and a list. The form contains three main input areas: 1. A text field with the value "Finance Committee" and a group icon to its left. 2. A dropdown menu with the value "QuickMinutes.com" and a building icon to its left. 3. A rich text editor with a toolbar containing bold (B), italic (I), bulleted list, numbered list, and link icons. The text in the editor reads: "The *Finance Committee* is a committee of *Governing Body*; its role is to provide oversight on financial matters on behalf of the *Governing Body*. These oversight responsibilities are set out in the QuickMinutes Code of Governance **January 2012** and in the Meeting Management Acts **1992 – 2006**." At the bottom right of the form is a green "Create" button.

Figure 3: Committee basics

Access to a Committee

If you create a committee you are automatically the administrator of that committee. You determine who have access and at what level.

Access to a committee can be granted and revoked within the member's section of a committee.

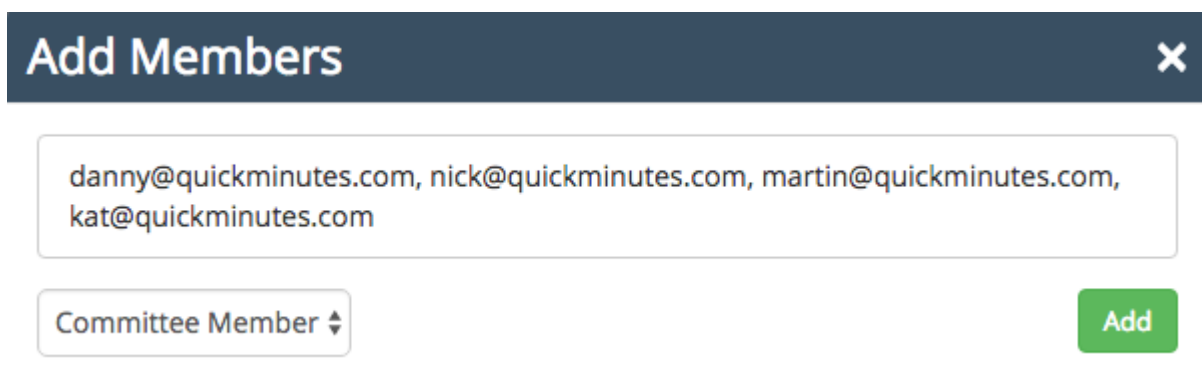


The screenshot shows the 'Weekly General Meeting' page in the QuickMinutes system. The 'Members' tab is selected, displaying a list of four members. A yellow arrow points to the 'Members' tab with the text 'Click to view members'. The members list includes:

Name	Status	Role	Action
Danny O'Donovan	User Active	Admin	Remove
Joseph Kearney	User Active	Member	Remove
Martin J Bullman	User Active	Member	Remove
Patch Moloughney	User Active	Admin	Leave

Figure 4: QM Manage committee access

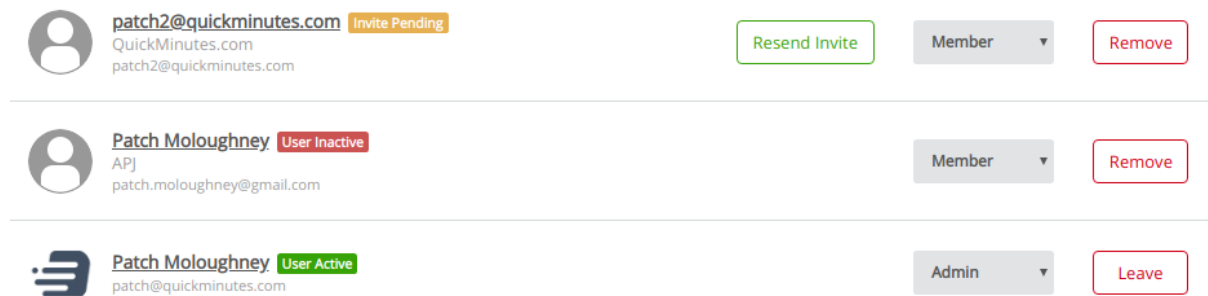
Clicking the Add Members button will launch a pop-up that enables you to add multiple members by copy & pasting multiple email addresses and clicking 'Add'. At this point you can also specify the user's permissions within the committee i.e. Committee Administrator or Committee Member.



The 'Add Members' modal window is shown, featuring a text input field containing the email addresses: danny@quickminutes.com, nick@quickminutes.com, martin@quickminutes.com, and kat@quickminutes.com. Below the input field is a dropdown menu set to 'Committee Member' and a green 'Add' button.

Figure 5: QM add members modal

The Members area also gives the Administrator high-level insights as to the status of an individual user.



The screenshot displays a list of three users in a table-like format. Each user entry includes a profile icon, name, email, status, role, and action buttons. The first user, 'patch2@quickminutes.com', has a status of 'Invite Pending' and a 'Resend Invite' button. The second user, 'Patch Moloughney', has a status of 'User Inactive' and a 'Remove' button. The third user, also 'Patch Moloughney', has a status of 'User Active' and a 'Leave' button.




	patch2@quickminutes.com Invite Pending QuickMinutes.com patch2@quickminutes.com	Resend Invite	Member ▼	Remove
	Patch Moloughney User Inactive APJ patch.moloughney@gmail.com		Member ▼	Remove
	Patch Moloughney User Active patch@quickminutes.com		Admin ▼	Leave

Figure 6: QM pending invite page

User Active: Means the user has been active within the last two months.

User Inactive: Means that the user has signed up but has not been active within the last two months.

Invite Pending: Means the user has been invited but has not signed up yet. Invite can be reissued by clicking the yellow envelope.

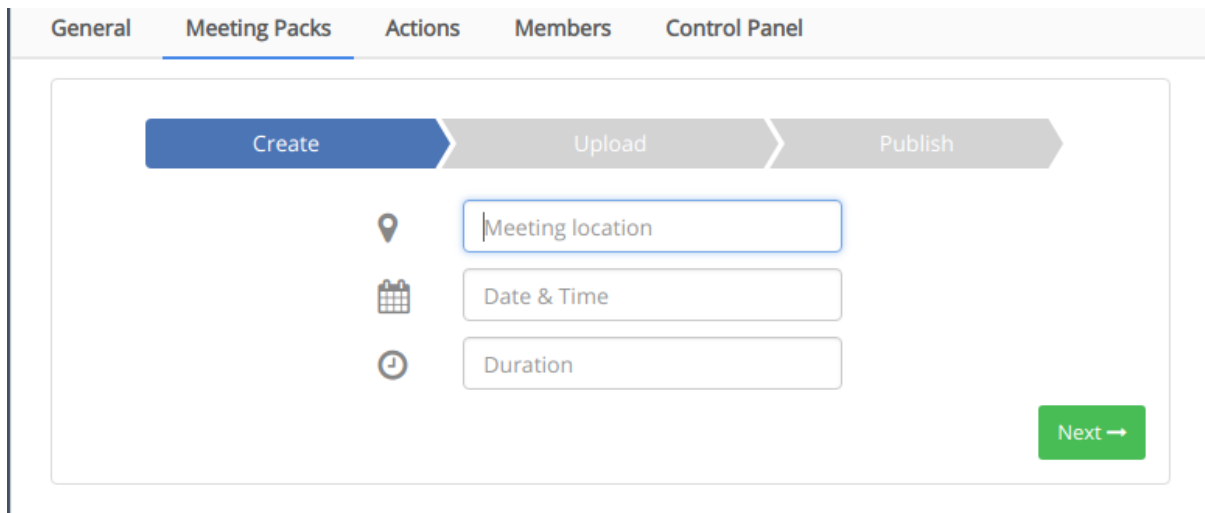
Important Note:

All Committees must have an admin. If you are the sole admin of a committee but are moving or leaving the department it would be best practise to assign a new admin before leaving.

Create a Meeting / Meeting Pack

If you are the 'Committee Admin' you can easily manage documentation, create actions and create meetings which will be automatically populated in the respective 'Committee Members' calendar.

Step One: In the 'Meeting Packs' section of a committee, click 'Create Meeting' and follow the on screen instructions.



The screenshot shows a navigation bar with tabs: General, Meeting Packs (selected), Actions, Members, and Control Panel. Below the navigation bar is a modal window with a progress indicator at the top showing three steps: 'Create' (active, blue), 'Upload' (disabled, grey), and 'Publish' (disabled, grey). The main content area contains three input fields: 'Meeting location' (with a location pin icon), 'Date & Time' (with a calendar icon), and 'Duration' (with a clock icon). A green 'Next →' button is located at the bottom right of the modal.

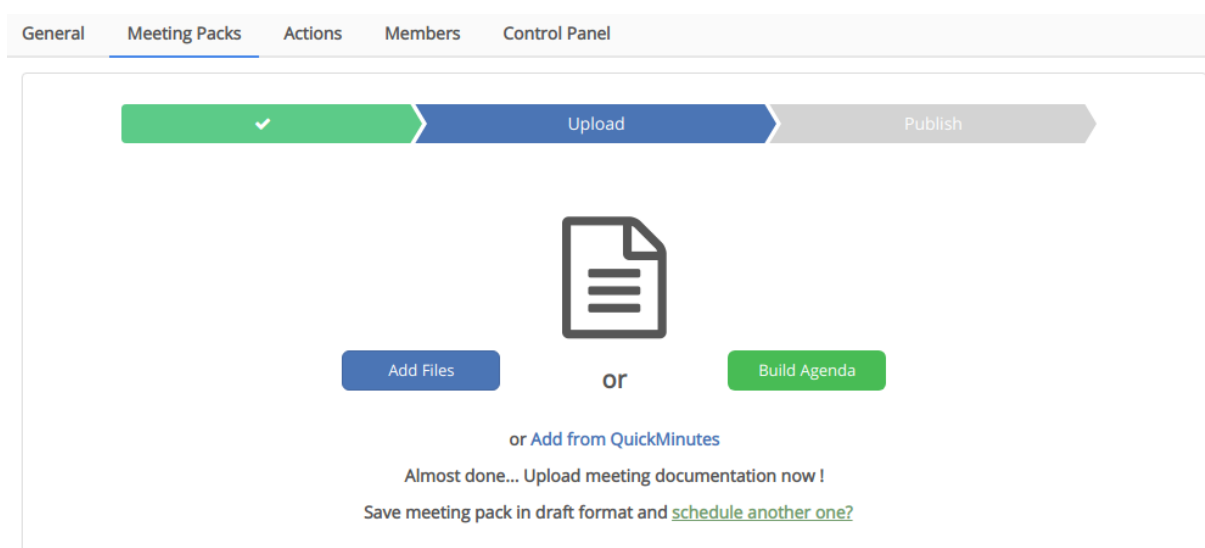
Figure 7: QM create meeting pack modal

Step Two: Populate the 'Meeting Pack' with meeting documentation. You have three options.

Option A: 'Add Files' from your computer

Option B: 'Add Files' from QuickMinutes' i.e. Minutes from last meeting or crossover documentation from another committee

Option C: 'Build Agenda' within QuickMinutes and add the files directly to the Agenda



The screenshot shows the same navigation bar as Figure 7. The modal window's progress indicator shows the first step completed (green with a checkmark), the second step 'Upload' active (blue), and the third step 'Publish' disabled (grey). The main content area features a document icon in the center. Below the icon are two buttons: 'Add Files' (blue) and 'Build Agenda' (green), separated by the word 'or'. Below these buttons is the text 'or Add from QuickMinutes' in blue. At the bottom, there is a message: 'Almost done... Upload meeting documentation now !' followed by 'Save meeting pack in draft format and [schedule another one?](#)'.

Figure 8: QM add documentation to meeting pack

Step Three: The last step is to click 'Publish'. Selected members will then receive the following email notification where the Committee member then has the option to quickly access meeting documentation or submit their apologies.

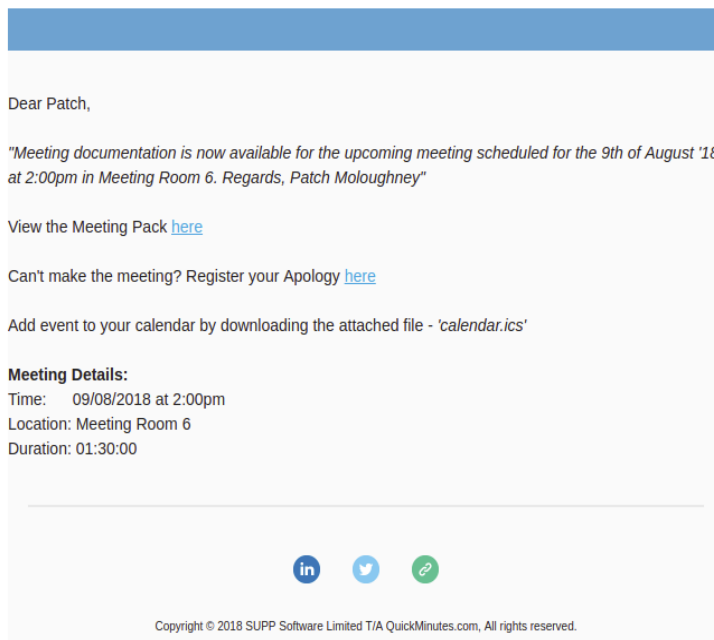


Figure 9: QM meeting pack notification

Editing the Agenda

Oftentimes agendas are built slowly over time. With QuickMinutes if you have used the agenda builder you can come back and edit your agenda several times before choosing to publish it. Just use the edit agenda button shown in Figure 10

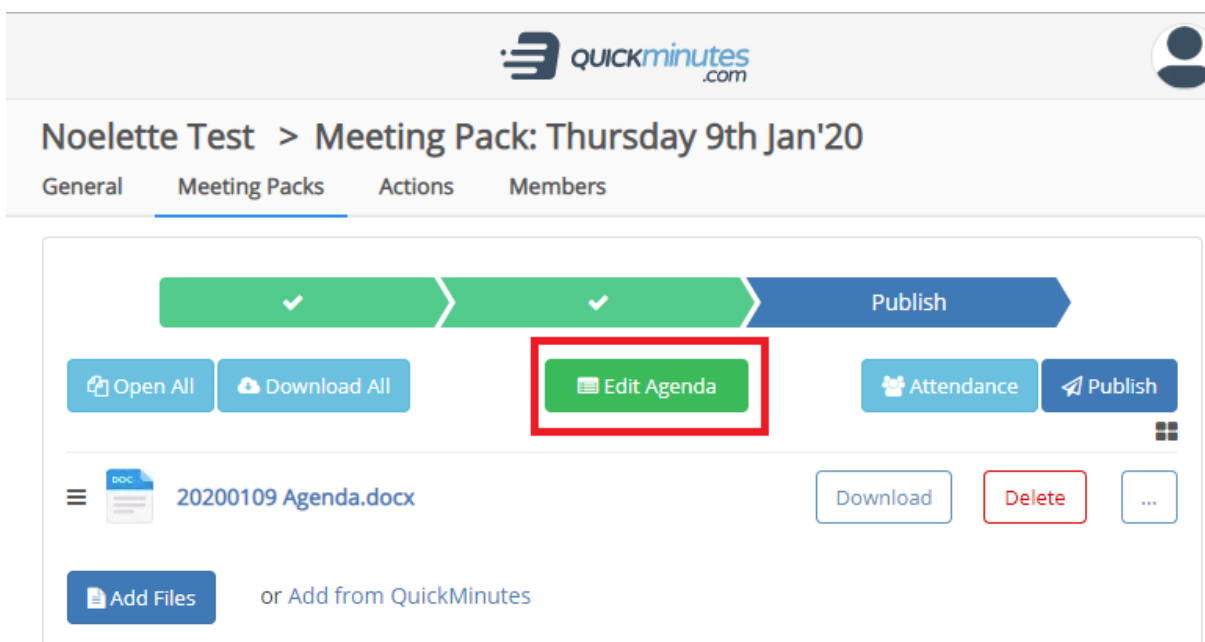


Figure 10: Edit Agenda

Meeting updates

You can notify Members of updates to the 'Meeting Pack' by using the 'Notify' option within the 'Meeting Pack'.

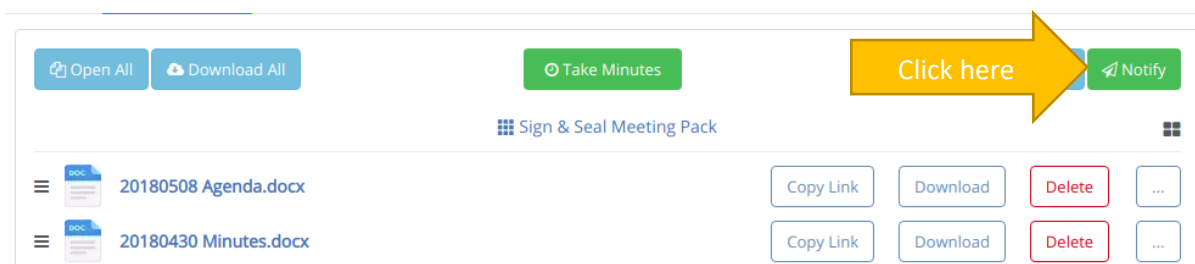


Figure 11: Notify

Agenda Builder

The Agenda Builder is an interactive feature that allows the committee administrator upload meeting documentation directly to the 'Meeting Pack' where members can access, engage and participate in the meeting in a paperless fashion.

The Agenda Builder can:

- Create an Agenda template on click;
- Automatically populate Meeting Details i.e. Date, Time, etc;
- Enable you to, remove or reorder Agenda items with drag & drop;
- Automatically number Agenda items with a numbering protocol;
- Enable you to directly attach document(s) to Agenda items;
- Enable you to update a document(s) status as well as 'Info' on specific Agenda (sub) items;
- Can automatically generate a .docx to be made available for members.
- Work harmoniously with existing QuickMinutes functionality;

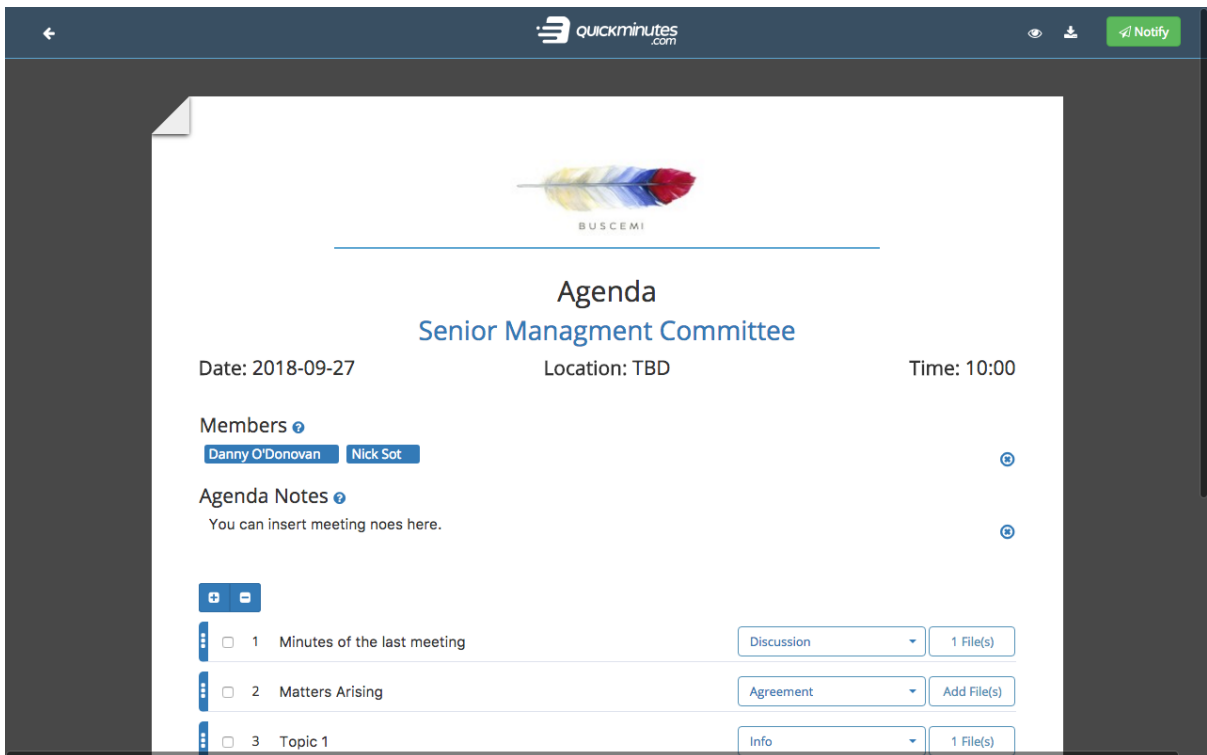


Figure 12: Agenda Builder


Taking Minutes

Once a meeting begins, click the 'Take Minutes' button, just above the files of the meeting pack, this will open the 'Minutes Builder'. The 'Minutes Builder' comes pre-populated with the items from the corresponding Agenda.

From here you can;

- Mark Attendance and Apologies
- Take notes on each item
- Set the outcome for each item
- Assign an owner for each item
- Assign a due date for each item

Save & Exit Notify





Weekly General Meeting

Location: Office
Time: 2:52 pm
Date: Monday, 20 August, 2018

In Attendance
 Patch, Danny ⊙

Apologies
 Martin ⊙

Meeting Minutes

1.	Item A	Note	N/A	Owner	Due Date	
2.	Item B	All in agreement, Patch to take lead on resolution of Item B	Action	Patch	2018/08/23	

Figure 13: Taking Minutes

Additional Support Materials

QuickMinutes provide additional support materials on line in their FAQ:

<https://quickminutes.com/faq>

