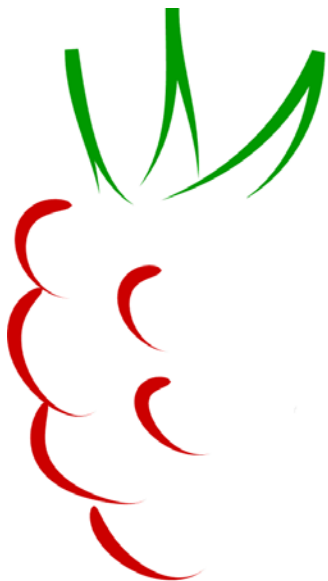


# Minute Minder 1.0

## User Documentation

---



Raspberry Software Limited  
42J Barrack Square,  
Martlesham Heath,  
Ipswich,  
Suffolk,  
IP5 3RF

[www.raspberrysoftware.com](http://www.raspberrysoftware.com)

Copyright © Raspberry Software Limited 42J Barrack Square, Martlesham Heath, Ipswich, Suffolk, IP5 3RF. All rights reserved.

Issue 1.

Compiled: 18th April 2005  
Revision: 1.0  
Software Version: 1.0

No part of this documentation may be stored in a retrieval system, transmitted or reproduced in any way, except in accordance with the terms of the applicable software license agreement. This documentation contains proprietary information of Raspberry Software Limited, and/or its suppliers.

## **Trademark Acknowledgements**

All other trademarks or registered trademarks referenced are the property of their respective owners.

## Contents

---

<b>WELCOME TO MINUTE MINDER</b> .....	<b>5</b>
WHAT IS MINUTE MINDER?.....	6
WHO SHOULD USE THIS GUIDE? .....	6
MINUTE MINDER FUNCTIONALITY .....	6
TECHNICAL SUPPORT & ADDITIONAL INFORMATION .....	7
FUTURE DEVELOPMENT.....	8
DOCUMENT CONVENTIONS .....	8
<b>INSTALLATION</b> .....	<b>10</b>
PREREQUISITES.....	11
INSTALLING MINUTE MINDER .....	11
UNINSTALLING MINUTE MINDER .....	15
INSTALLATION TROUBLESHOOTING.....	18
LICENSE KEY .....	19
<b>APPLICATION OVERVIEW</b> .....	<b>20</b>
STARTING MINUTE MINDER .....	21
MINUTE MINDER FILE LIST .....	21
EDITING OR CREATING A MEETING.....	23
MINUTE MINDER APPLICATION MAP.....	23
<b>CREATING A MEETING</b> .....	<b>26</b>
CREATING A MEETING .....	27
MEETING TITLE .....	28
MEETING DATE & TIME.....	28
INVITING MEETING ATTENDEES USING CONTACTS .....	30
INVITING MEETING ATTENDEES WHO ARE NOT IN CONTACTS .....	32
CREATING A MEETING AGENDA .....	34
REMOVING AGENDA ITEMS .....	36
MODIFYING AGENDA ITEMS .....	37
DETERMINING AGENDA ITEM ORDER .....	38
<b>BOOKING THE MEETING</b> .....	<b>39</b>
BOOKING THE MEETING. ....	40
<b>TAKING MEETING MINUTES</b> .....	<b>43</b>
AGENDA ITEMS & CONTRIBUTORS .....	44
MINUTE CATEGORIES .....	45
NAVIGATING MINUTED ITEMS .....	46
NEW AND DUE.....	48
NOTE TEXT.....	48
ADDING MINUTE NOTES.....	49
MODIFYING MINUTE NOTES .....	50
MANIPULATING NOTES TEXT .....	50
SAVING NEW AND MODIFIED MINUTE NOTES .....	51
CREATING NEW AGENDA ITEMS AND NEW CONTRIBUTORS .....	52
<b>DISTRIBUTING MEETING MINUTES</b> .....	<b>54</b>
STEPS PERFORMED AS PART OF THE DISTRIBUTE PROCESS.....	55
<b>QUICK IMPORT</b> .....	<b>60</b>
<b>MINUTE MINDER OPTIONS</b> .....	<b>63</b>

SETTABLE OPTIONS .....	64
<b>CUSTOMIZING TEMPLATES.....</b>	<b>66</b>
TEMPLATE TAGS.....	68
REPEATING AND NON-REPEATING TAGS .....	68
NON-REPEATING TEMPLATE TAG DEFINITIONS.....	69
REPEATING TEMPLATE TAG DEFINITIONS .....	72
EXAMPLE TEMPLATE FILE .....	76

This chapter briefly describes Minute Minder and outlines the contents and the intended audience of this guide. Product registration and technical support information is also included, along with a brief description of the document conventions used within this guide.

## What is Minute Minder?

Let me start by asking two questions:

### Question 1

Ever attended a meeting and been coerced into taking the meeting minutes? Not being prepared you reach for the nearest scrap of paper or borrow some sheets from a colleague. After leaving the meeting with pages of notes do you then spend the next hour or so typing these minutes into a formatted document?

### Question 2

Ever attended a meeting where not everyone is clear of the purpose of the meeting, what the agenda of the meeting is and who is attending the meeting. Ever left these meetings feeling that nothing was decided or even feeling more confused than when you went in?

While not a betting person I would lay good odds that you said yes to at least one of these questions.

Congratulations in purchasing Raspberry Software's Minute Minder. Minute Minder has been designed by engineers who have worked in large companies and are no strangers to attending meetings with the qualities described by the two questions above.

## Who should use this guide?

This guide is intended for complete novices of Minute Minder. While this document will guide you through the installation process it is assumed that the user is familiar with the basic navigation of their mobile device.

The guide has been created as a reference guide whereby usability is described step-by-step by visiting the appropriate chapter.

## Minute Minder Functionality

Minute Minder helps you manage all activities associated with arranging a meeting, minuting the meeting and publishing the meeting minutes. Features of the application include:

### Pre-Meeting Activities

- Gather Attendee information using the Contacts on your mobile device.
- Determine a date and time for your meeting.
- Create an agenda for a meeting associating sequencing, times and owners for each agenda item.
- Sending calendar invites to all those invited to the meeting attaching to the invitation the detailed agenda you created via Minute Minder.

### Meeting Activities

- Using your mobile device to easily record minutes of the meeting using the input methods supported by your mobile device.

## Minute Minder

---

- Easily associating minute notes taken with who contributed to them and to what agenda items they relate to.
- Easily navigating through notes already taken to add or amend notes or read back what was said at any one time.
- Automatically associating reference numbers to the notes taken and durations of how long a topic was discussed.
- Automatically time stamping minuted agenda items in order to profile where time has been spent during the meeting.

### **Post-Meeting Activities**

- Previewing the notes taken in the meeting making amendments where necessary.
- Automatically generating formatted minutes which will be sent to all those who attended the meeting via the Microsoft Outlook Calendar using an RFT formatted attachment.
- Providing a mechanism for generating customized formatted minutes using user generated output templates.

Within a short space of time you will not only be more organised within meetings but your colleagues will be better informed as to the purpose of the meeting and the decisions and actions that resulted of your meetings.

You will soon start to wonder how you managed before Minute Minder!

## Technical Support & Additional Information

While every effort has been made to ensure the product is as intuitive as possible we recognise that from time to time questions will need to be answered about Minute Minder. At Raspberry Software we see every item of feedback as an opportunity to improve our products and therefore welcome any emails regarding Minute Minder or any of our services.

Should you have a technical question regarding Minute Minder please email:

[support@raspberrysoftware.com](mailto:support@raspberrysoftware.com)

Should you require some general information regarding Minute Minder or any of Raspberry Software's products then please email:

[info@raspberrysoftware.com](mailto:info@raspberrysoftware.com)

Should you wish to provide us with some general feedback on any aspect of Raspberry Software activities then please email:

[feedback@raspberrysoftware.com](mailto:feedback@raspberrysoftware.com)

A Minute Minder forum has been created whereby users of Minute Minder can share their experiences of using the product. Forums can be visited using:

<http://www.raspberrysoftware.com/forums/>

### Future Development

If you have an idea for an application for a mobile device but have no sponsor to turn the vision into reality, then email:

[feedback@raspberrysoftware.com](mailto:feedback@raspberrysoftware.com)

for a no-obligation non-disclosure discussion.


### Document conventions

This guide uses the following conventions:

- Commands and buttons  
For easy recognition within procedures, User Interface (UI) features appear in bold type. For example: On the **File** menu, click **New**.
- Monospaced font indicates data that you enter using your mobile device. For example:

In the **Meeting Title** enter:

Project Update Meeting

- Information that the user is requested to make special note of is marked with a  symbol.  
For example:



The date format that dates will be displayed in are controlled by the default date format set for you mobile device.

- In order to use this User Guide as a reference manual, specific aspects of the applications step-by-step instructions are provided in the following style to allow quick scanning of the document. For example:

## Minute Minder

The Start and Finish time, and Date of the meeting are entered as follows:

1. Select the start time by altering the hour, minutes, seconds and AM/PM elements of the **Start** time.
2. Select the date you wish to hold the meeting by changing the date elements of the **Date** field or use the dropdown calendar control to select a date.
3. Select the start time by altering the hour, minutes, seconds and AM/PM elements of the **Finish** time.

The screenshot shows the 'Minute Minder' application window. The title bar includes the Windows logo, the text 'Minute Minder', a back arrow, the time '10:29', and an 'ok' button. The main content area is titled 'Meeting Time' and is divided into two sections: 'Start' and 'Finish'.  
In the 'Start' section, there is a clock face with a green hand pointing to 10:45. To the right of the clock are two dropdown menus: the top one is set to '10:45 AM' and the bottom one is set to '18/07/05'.  
In the 'Finish' section, there is a clock face with a red hand pointing to 11:15. To the right is a dropdown menu set to '11:15 AM'.  
Below the 'Finish' section, the text 'Meeting Length: 30mins' is displayed. At the bottom right of the window, there is a small icon of a keyboard and an upward-pointing arrow.

This chapter describes the process by which you install and uninstall Minute Minder to your mobile device. In addition this chapter provides some details on troubleshooting the installation process.

## Prerequisites

Before you install Minute Minder you need to ensure the following:

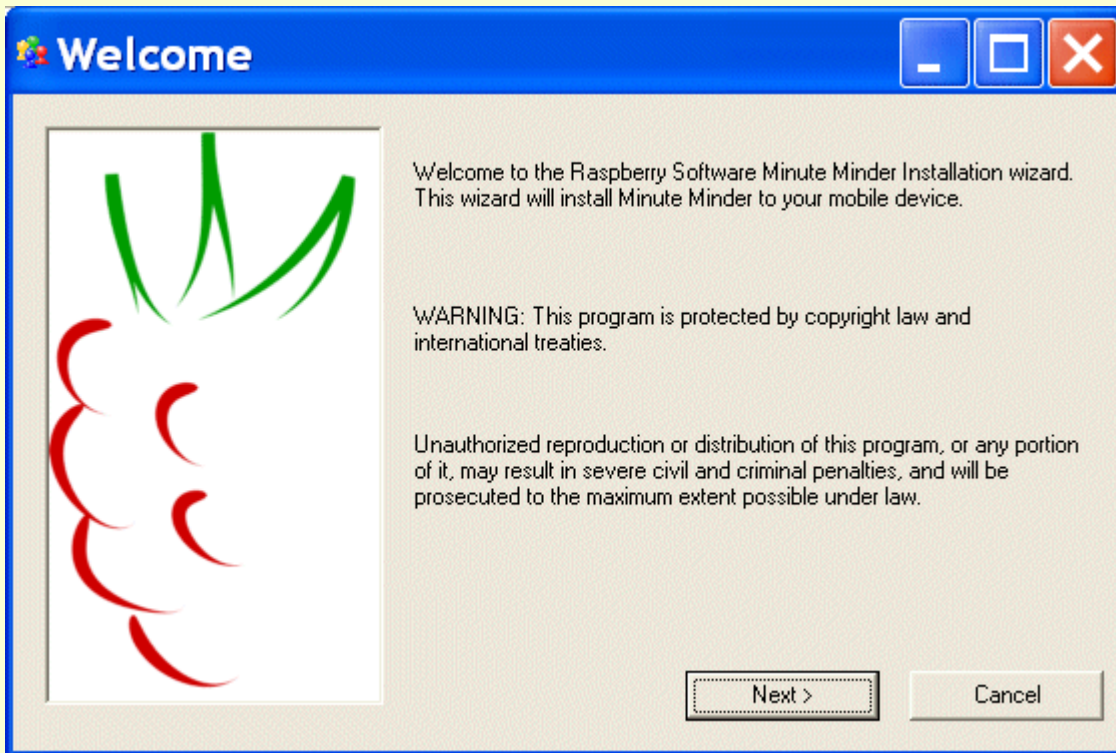
1. You are installing to the PocketPC (PPC 2002 or PPC 2003) Operating System. At this time no other mobile devices are supported by Minute Minder.
2. You have ActiveSync installed and your Mobile Device is connected to the PC you are installing Minute Minder from.
3. You have the necessary installation files located within the same directory:
  - Setup.exe
  - Minuteminder.cab
  - Minuteminder.dat
  - Minuteminder.ini
4. You have removed any previous version of Minute Minder from your mobile device. Refer to Uninstalling Minute Minder.

If all the above conditions have been satisfied you are ready to install Minute Minder.

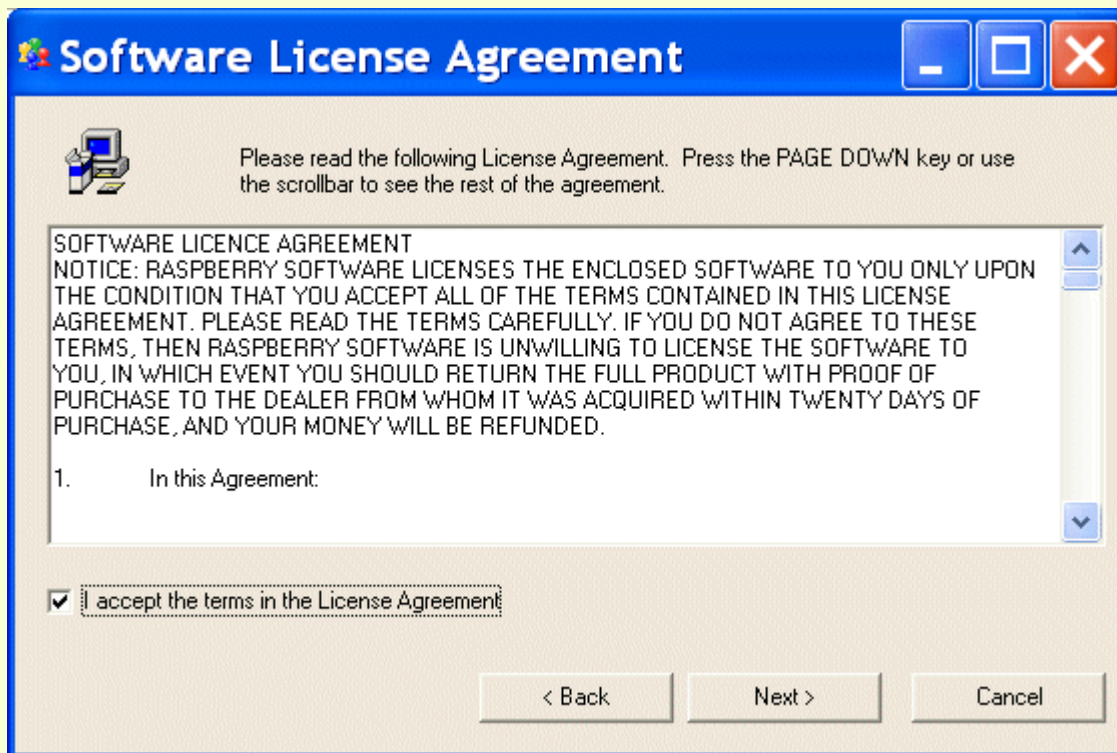
## Installing Minute Minder

To install Minute Minder on your mobile device:

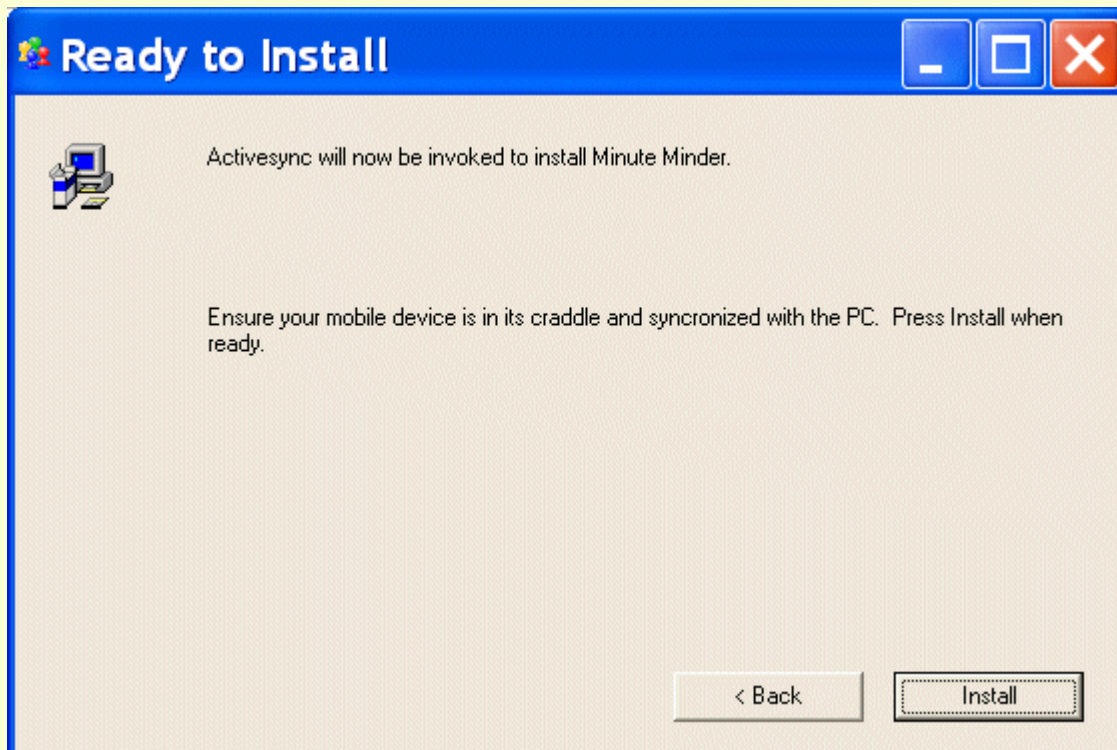
1. Double click **Setup.exe**. The following Dialog will be presented.



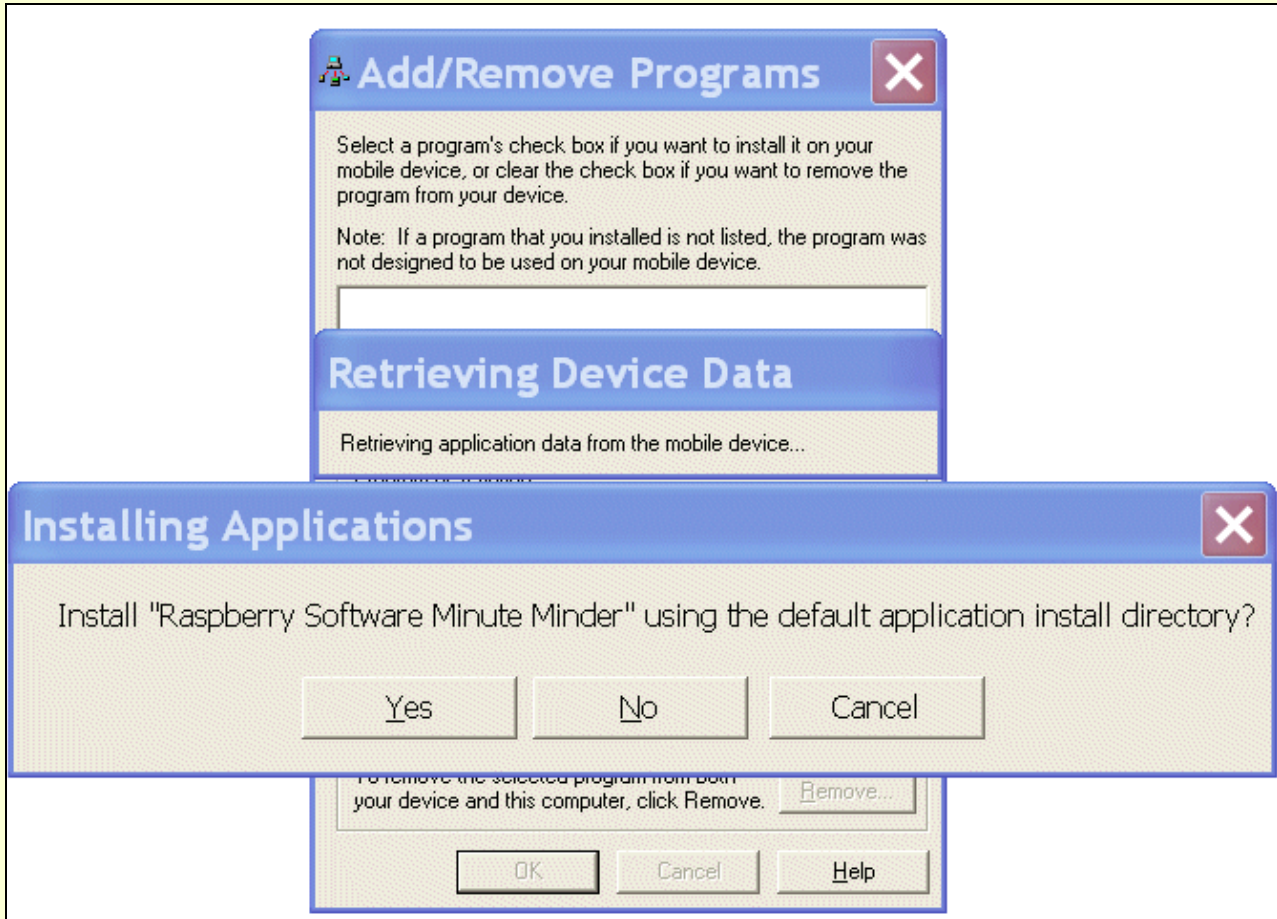
2. Click **Next** to continue with the installation (**Cancel** will abort the installation).



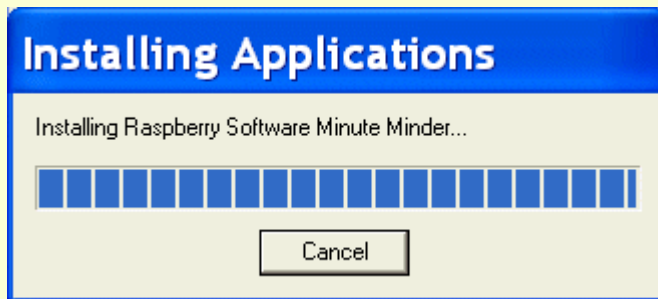
3. Read the License text fully. If you agree with the conditions within the License Agreement select the "I accept the terms in the License Agreement" checkbox and then press **Next**.



- Now press **Install**.



- The installation will now invoke the ActiveSync Application Manager. The Application Manager manages the installing and removing of programs from your mobile device. Once prompted to install Minute Minder select **Yes**.



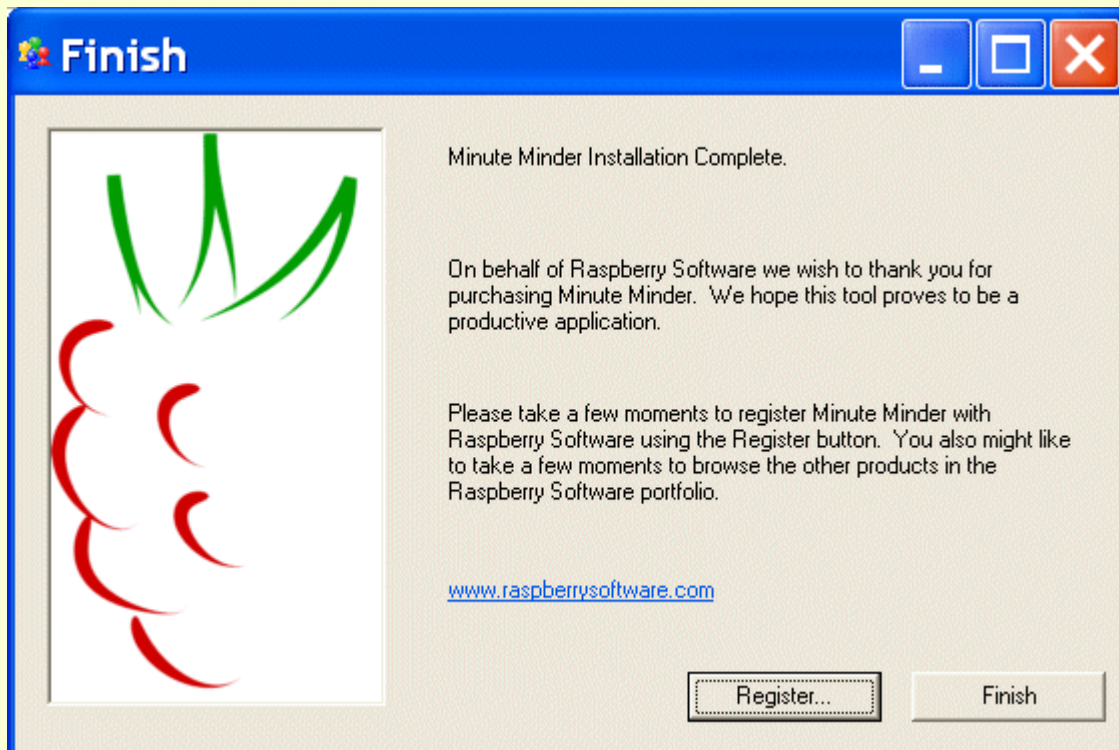
- All the necessary files will be transferred from your PC and installed onto your Mobile Device.

### Application Downloading Complete

Please check your mobile device screen to see if additional steps are necessary to complete this installation.

OK

7. You will notice that your mobile device will display a progress bar as the install progresses. Simply click OK to the above dialog, ActiveSync will and close return control the Minute Minder Installer.

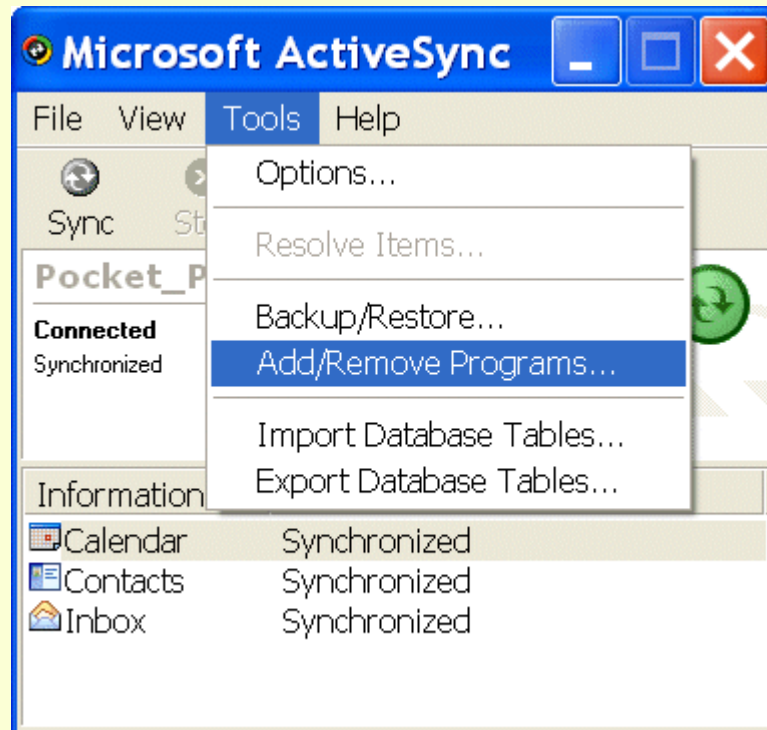


8. Select **Register...** to register with Raspberry software as a user of Minute Minder. Registering will provide support for the product and provide notifications of new versions/patches of the Minute Minder product. It is strongly recommended you Register Minute Minder. Once you have Registered select **Finish** to close the installer.
9. To run Minute Minder select **Programs** from the **Start Menu** on your mobile device and run Minute Minder.

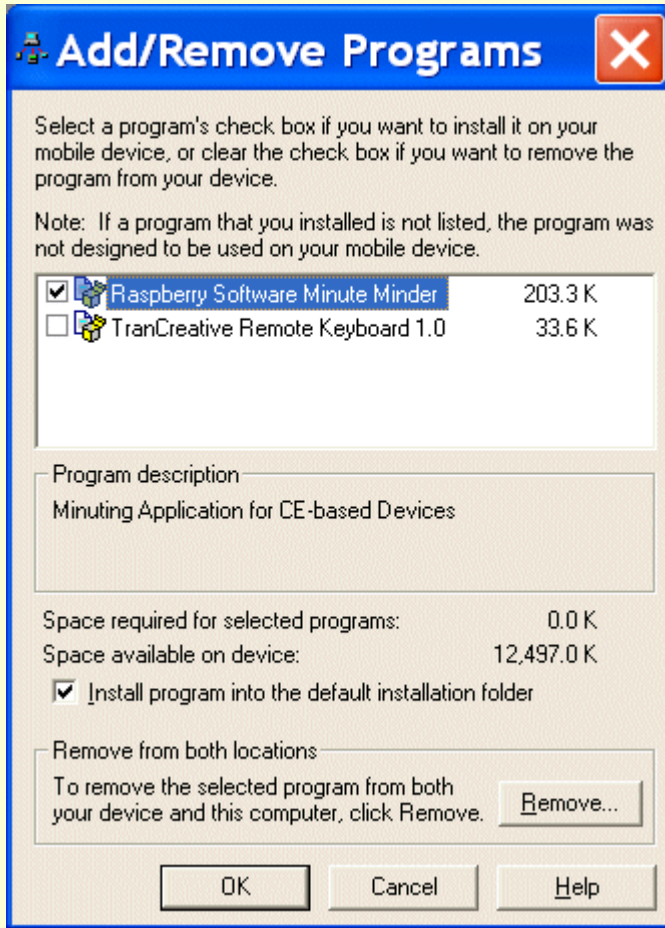
### Uninstalling Minute Minder

To Uninstall Minute Minder from you Mobile device:

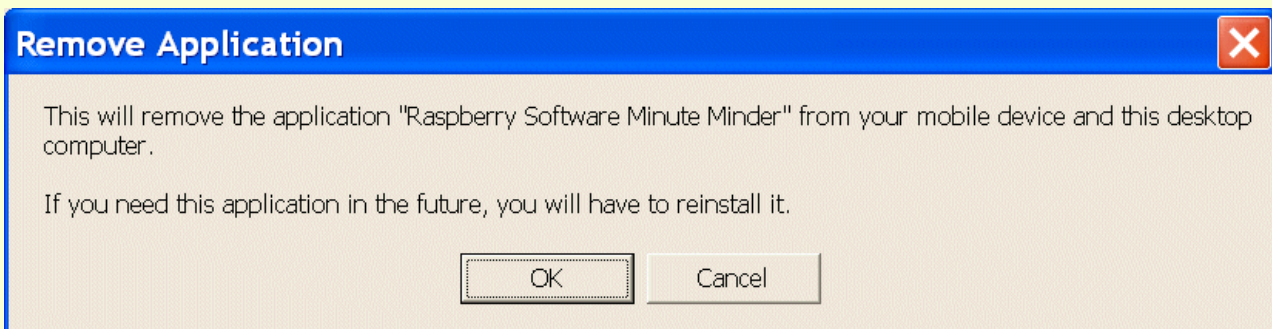
1. Using ActiveSync with your mobile device connected, select **Add/Remove Programs** from the **Tools** menu.



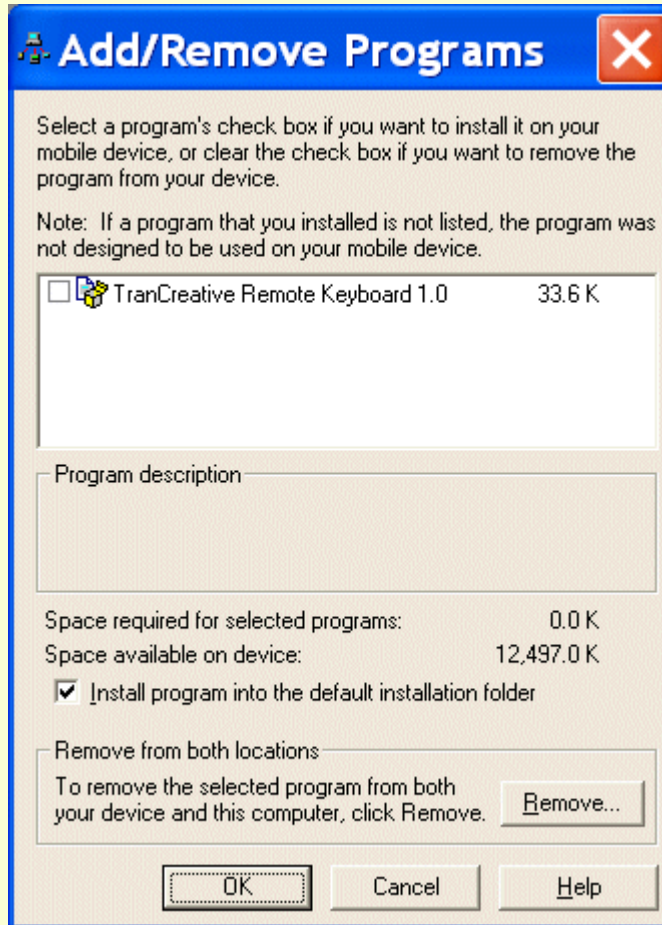
2. A dialog will be presented displaying a list of all the applications installed on your mobile device.



3. Select **Raspberry Software Minute Minder** from the list and then press **Remove...**



4. A prompt will be displayed to confirm that you wish to remove Minute Minder from your mobile device and your desktop PC. Select **OK** if you wish to proceed with the uninstall.



5. Once uninstalled you will be returned to the Add/Remove programs screen. All Minute Minder application files and shortcuts will have been removed from your mobile device. Minute Minder will no longer appear in the installed programs list. Press **OK** to close the dialog.

### Installation Troubleshooting

The following provides a series of questions and answers that should address any issues you encounter within the installation process. Should your question not be answered below then please email your query to [support@raspberrysoftware.com](mailto:support@raspberrysoftware.com)

**Q1.** I receive an error message “Error: Unable to locate ActiveSync (CEAPPMGE.EXE) within registry. Unable to proceed with install.”

**A1.** The ActiveSync executable CEAPPMGE.EXE is invoked by the Minute Minder installer to manage the installation process onto your mobile device. The location of CEAPPMGE.EXE is determined by a registry lookup of:

HKLM\software\Microsoft\Windows\CurrentVersion\App Paths\CEAppMgr.EXE.

This registry key is created as part of the ActiveSync installation process. There may be a problem with the ActiveSync installation. Uninstall and then reinstall ActiveSync.

---

**Q2.** I receive an error message:

“Error: Unable to locate all the files necessary to complete the installation of Minute Minder.

The missing file(s) is:

CEAPPMGE.EXE. This is usually located within C:\Program Files\Microsoft\Activesync\  
...”

**A2.** The ActiveSync executable CEAPPMGE.EXE cannot be found in the location identified by registry setting:

HKLM\software\Microsoft\Windows\CurrentVersion\App Paths\CEAppMgr.EXE

This executable is created as part of the ActiveSync installation process. There may be a problem with the ActiveSync installation. Uninstall and then reinstall ActiveSync.

---

**Q3.** What files are installed on my mobile device?

**A3.** The following files are installed on your mobile device as part on the installation process:

*Files:*

My Device\Program Files\Raspberry Software\Minute Minder\Minute Minder.exe

My Device\Program Files\Raspberry Software\Minute Minder\Templates\standard.rtf

*Shortcuts:*

My Device\Windows\Start Menu\Programs\Minute Minder <-maps to-> Minute Minder.exe above.

### License Key

Minute Minder is protected by a License key. Once installed the product will be useable for 14 days without a license key being entered into the product. This time period provides a “try before you buy” trial period.

Once the time period has expired a valid license key will need to be entered into Minute Minder. Your license key may be provided with the download of the product, if this is not the case please contact the supplier of Minute Minder.

The license key should be entered using the **Help - About** menu option.

# Application Overview

3

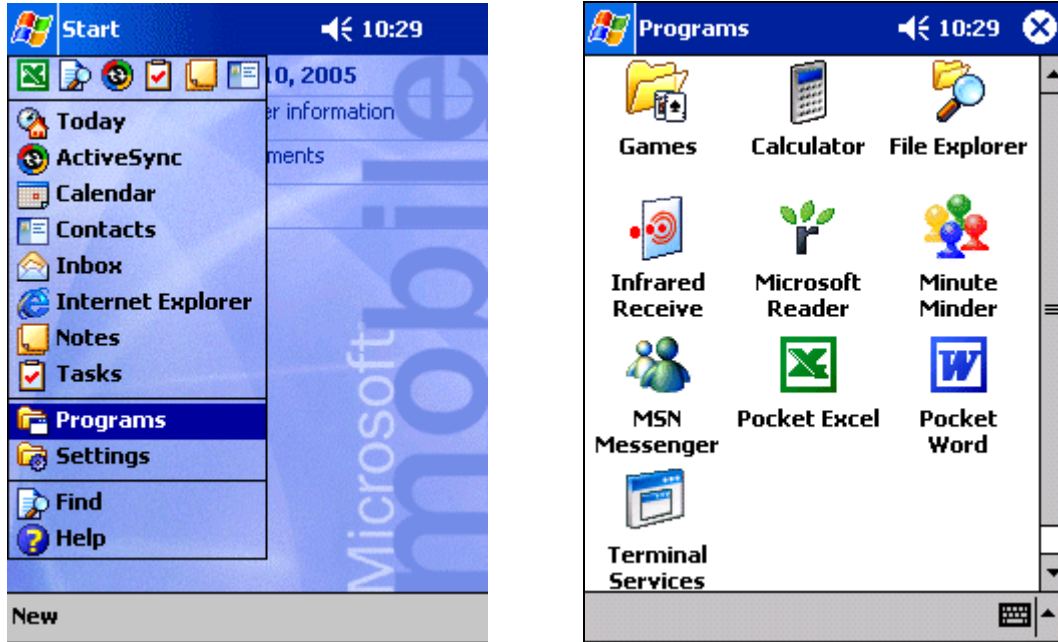
---

This chapter provides an overview of the general layout of Minute Minder. Specifically it will provide an overview of the features available and a general overview of how you access these features via the application.

# Minute Minder

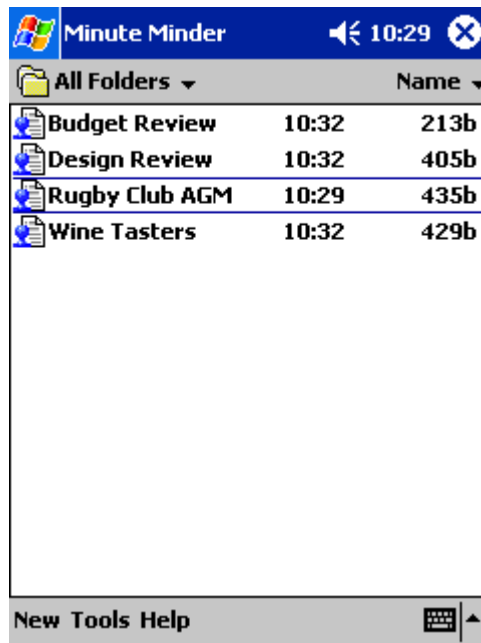
## Starting Minute Minder

Once installed, Minute Minder can be started from the **Start** menu via **Programs**.



## Minute Minder File List

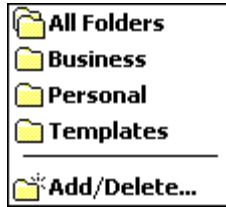
Once started a list of previously stored meetings will be presented. If entering the application for the first time the list of files will be blank.



## Minute Minder

---

By default, all Minute Minder saved files are displayed in the file list, however, the contents for specific folders can be displayed by using the **All Folders** dropdown and selecting an alternative folder.



The files within the list can be manipulated by clicking holding on a specific file. The following menu will be displayed.



**Create Copy** is a useful option if you wish to create a new meeting based on a previous meeting. For example you may have a meeting that has the same Attendees, by copying the existing meeting file to a new meeting then this provides a starting point in creating a new meeting.

**Delete** permanently removes the file from your mobile device. This operation is irreversible.

**Select All** highlights all files in the list. Actions on click and holding (such as Delete) will apply to all files.

**Send via E-mail** attaches the file to an email in order to send the Minute Minder file to a friend or colleague.



These files are unique to Minute Minder and will not be viewable outside Minute Minder.

**Beam File** provides a facility to send the selected file via infra-red to another mobile device. Please refer to the note above.

**Rename/Move** opens another dialog allowing the user to rename the file and/or move it to another location.

## Editing or Creating a Meeting

Previous meetings can be edited by simply clicking on one of the files in the file list. Alternatively if you wish to create a new meeting select **New** from the menu bar.

## Minute Minder Application Map

The following provides an overview of the functionality provided by Minute Minder, it details the functionality provided by each Minute Minder option as well as the menus available for each option.

Minute Minder Option	Able to Access Functionality	How?
<i>File List Screen</i>	<p><b>Setup Meeting</b> dialog (New)</p> <p><b>Setup Meeting</b> dialog (Edit exiting meeting)</p> <p>Import the next or current meeting from your Calendar.</p> <p>Change Minute Minder Options.</p> <p>View Minute Minder version number and view or enter a License Key.</p> <p>Manipulate existing Minute Minder Files.</p> <p>Navigate existing folder structures.</p>	<p><b>New</b> from the menu bar</p> <p>Select a file from the file list.</p> <p><b>Tools – Quick Import</b> from the menu bar.</p> <p><b>Tools – Options...</b> from the menu bar.</p> <p><b>Help – About...</b> from the menu bar</p> <p>Click and Hold on an existing file to present a menu of choices.</p> <p>Select the Folders dropdown list.</p>
<b>Setup Meeting</b> (New/Edit)	<p>Set/Edit the Title for your meeting</p> <p>Set/Edit the Meeting Start/End time and date using <b>Meeting Time</b> dialog.</p> <p>Choose/Edit Attendees for the meeting using <b>Attendees</b> dialog.</p> <p>Set/Edit the Agenda using <b>Agenda</b> dialog.</p> <p>Send meeting invite using Calendar invite to selected attendees. (Only available after meeting title, time, attendees and agenda items have been created via <b>Meeting Setup</b> dialog)</p>	<p>Use the meeting title field.</p> <p>Use the <b>Set...</b> button.</p> <p>Use the <b>Choose...</b> button.</p> <p>Use the <b>Set...</b> button.</p> <p><b>Tools – Book</b> from the menu bar.</p>

# Minute Minder

	<p>Record minutes against the meeting created. (Only available after meeting title, time, attendees and agenda items have been created via <b>Setup Meeting</b> dialog)</p> <p>Distribute formatted minutes of a recorded meeting to those who attended the meeting. (Only available after meeting has been created and minutes recorded.)</p> <p>Change Minute Minder Options.</p> <p>View Minute Minder version number and link to Raspberry Software web site.</p>	<p><b>Tools – Minute...</b> from the menu bar.</p> <p><b>Tools – Distribute</b> from the menu bar.</p> <p><b>Tools – Options...</b> from the menu bar.</p> <p><b>Help – About...</b> from the menu bar.</p>
<p><b><i>Book Meeting via Calendar Invite.</i></b></p>	<p>Send a Calendar invite to all invitees of a previously created meeting.</p>	<p><b>Tools – Book</b> from the menu bar from the <b>Setup Meeting</b> dialog.</p>
<p><b><i>Minute Meeting</i></b></p>	<p>Create a New minute note.</p> <p>Select Agenda Item to record Minute notes against.</p> <p>Select Contributor to record Minutes against.</p> <p>Select Agenda Type to record Minutes against.</p> <p>Record the text associated with a minuted note.</p> <p>Choose a Due date a minuted item should be complete by. (Only available for Minutes notes with a type of ACTION.)</p> <p>Navigate to another agenda item.</p> <p>Manipulate the minuted text (Copy, Cut, Paste etc.)</p>	<p>Use the <b>New</b> button.</p> <p>Use the <b>Agenda Item</b> dropdown list.</p> <p>Use the <b>Contributor</b> dropdown list.</p> <p>Use the <b>Type</b> dropdown list.</p> <p>Use the text box below the navigation buttons.</p> <p>Use the <b>Due</b> button.</p> <p>Use the various arrow navigation buttons.</p> <p>Use the <b>Edit</b> menu on the menu bar.</p>

## Minute Minder

---

<b><i>Distribute Formatted Minutes to All Attendees of the meeting.</i></b>	Using the minutes previously recorded, automatically format the minutes using the Template selected within <b>Tools Options...</b> to all attendees of the meeting.	<b>Tools – Distribute</b> from the menu bar the <b><i>Setup Meeting</i></b> dialog.
<b><i>Set Minute Minder Preferences</i></b>	Set the preferred output type of formatted minutes.  Select a preferred template the formatted minutes will adhere to. (Only available if outputting in RTF format only).	<b>Tools – Options...</b> from the menu bar.

# Creating A Meeting

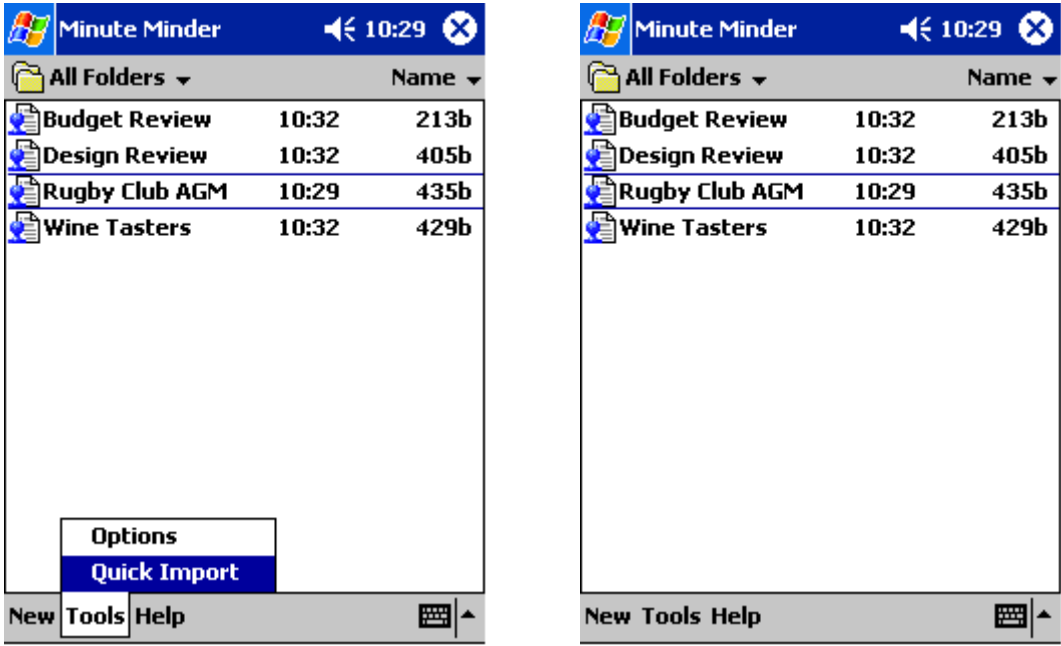
---

4

This chapter guides you through the process of creating a new meeting. Specifically the chapter will guide you through creating a name for a meeting, setting a date and time, choosing mandatory and optional attendees and creating agenda items for the meeting.

## Creating a Meeting

In this chapter we will create a new meeting to review the project your team is currently working on. After launching Minute Minder you will be presented with the following dialog. This dialog will contain no meeting files if you have not previously created meetings with Minute Minder.



From the file list we can either edit a previously created meeting by clicking on one of the files or create a new meeting by selecting **New** from the menu bar. As we are creating a new meeting we will select **New** which will present the following dialog.



# Minute Minder

---



If the meeting you are taking minutes on has already been sent as a calendar invite external to Minute Minder, Minute Minder can import this meeting and thus creating many of the elements of Meeting Setup such as meeting title, attendees and date and time. Refer to chapter Quick Import.

Within the dialog we can choose a title for our meeting, select a date/time for the meeting, choose mandatory and optional attendees for the meeting and finally construct an agenda for our meeting.

## Meeting Title

The **Enter a title for this meeting:** allows us to create a subject for our meeting. The title you choose here will appear in the Subject field of the Microsoft Outlook Calendar invite and is therefore an important field for your audience to get a first understanding of the purpose of the meeting.

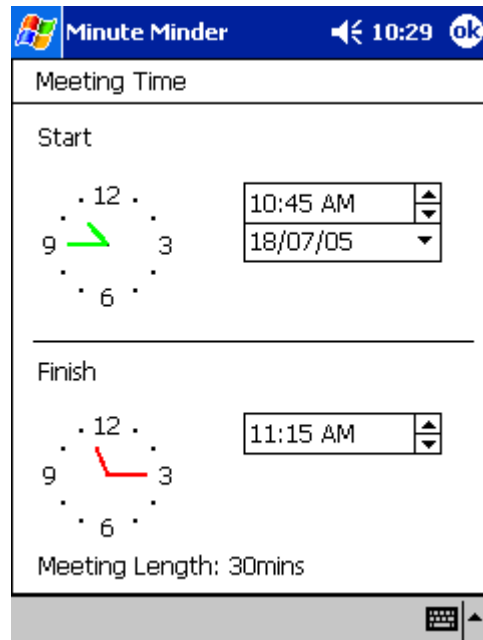
In addition the name of the meeting entered will be used as the filename the meeting will be saved to. Please refer to Minute Minder File List.



## Meeting Date & Time

The **Set** button within **Date/Time** allows you to select the date and start and finish time of the meeting.

**The Start and Finish time and Date of the meeting are entered as follows:**

1. Select the start time by altering the hour, minutes and AM/PM elements of the **Start** time.
2. Select the date you wish to hold the meeting by changing the date elements of the **Date** field or use the dropdown calendar control to select a date.
3. Select the finish time by altering the hour, minutes and AM/PM elements of the **Finish** time.
4. Press **OK** to close the Meeting Time dialog. The date/time of the meeting will be reflected in the **Setup Meeting** dialog.



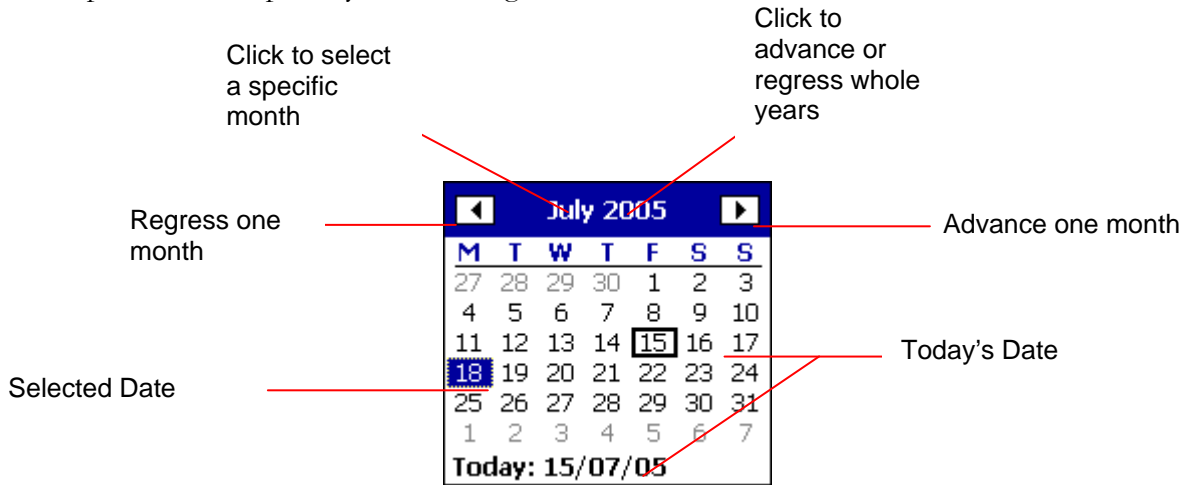
The Start and Finish times of the meeting can be altered by selecting the element of the time that requires changing (e.g. the Hour part of the field) and either using the   buttons to advance the time

# Minute Minder

element forwards or backwards, or, using your preferred IME device e.g. Keyboard or Block Recogniser to make time alterations.

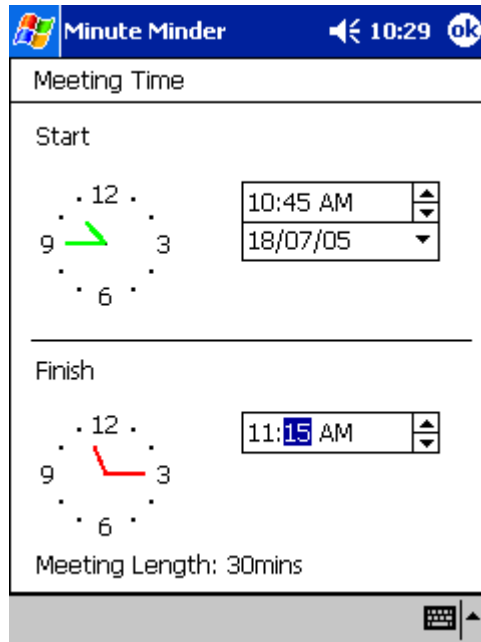
The Date of the meeting can be altered by selecting the element of the date that requires changing (e.g. the Day part of the field) using your preferred IME device e.g. Keyboard or Block Recogniser.

Alternatively the Date can be altered by the selecting the dropdown calendar control. This powerful control provides multiple ways of selecting the desired date.



Clicking on a day within the calendar control will result in the calendar closing and the meeting date field being updated with the date you selected.

If creating a meeting to run from 10:45 AM to 11:15 AM on the 18<sup>th</sup> July 2005 our Meeting Time dialog would look as follows:





## Minute Minder

Attendees for a meeting are selected as follows:

1. If a proposed attendee is to be a mandatory invitee to the meeting then the **Req** checkbox should be checked.
2. If a proposed attendee is to be an optional invitee to the meeting then the **Opt** checkbox should be checked.
3. If an invitee does not appear within this list then use the **Other** button to add additional attendees. (See below.)
4. Checking the **Only show selected contacts** checkbox will filter all contacts that have not been selected as a required (**Req**) or optional (**Opt**) attendees. This checkbox allows easy viewing of who has been invited to the meeting.

The screenshot shows the 'Minute Minder' application window. At the top, there is a title bar with the application name, a back arrow, the time '10:29', and an 'ok' button. Below the title bar is a section titled 'Attendees'. This section contains a grid of buttons for alphabetical filtering: '#ab', 'cde', 'fgh', 'ijk', 'lmn', 'opq', 'rst', 'uvw', and 'xyz'. Below these buttons is a table with columns for 'Name', 'Req', and 'Opt'. The table lists several attendees with their respective checkbox states. Below the table is an 'Other...' button and a checkbox labeled 'Only show selected contacts'. At the bottom of the window, it displays '5 attendees - 4 Req, 1 Opt.' and a keyboard icon.

Name	Req	Opt
Andy Bowen	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bob Holt	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Diane Fish	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gary Jarvis	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Greg Crystal	<input type="checkbox"/>	<input type="checkbox"/>
Heidi Lee	<input checked="" type="checkbox"/>	<input type="checkbox"/>
John Grant	<input type="checkbox"/>	<input type="checkbox"/>

The **Req** and **Opt** checkboxes are mutually exclusive given a meeting attendee cannot be a mandatory attendee and an optional attendee. As either the **Req** or the **Opt** checkboxes are selected then the other checkbox is greyed indicating that it cannot be altered. To reverse the selection firstly uncheck the checkbox that has been selected, this action will result in both checkboxes being available for selection.

Contacts can be located by using the vertical scrollbar (if you have more than one page worth of Contacts) or using the alphabetical buttons at the top of the display. Each press of these buttons will display names starting with the corresponding letter. For example pressing the **lmn** button once will display all names beginning with “l”, pressing **lmn** again will selected all names starting with “m”. Finally selecting the button a third time will result in all names being displayed that start with “n”. A forth press of the button will restart the cycle by selecting all names starting with “l”.



Minute Minder uses the persons name and email address to provide a unique reference point to the person selected. If you have a two Contacts or Attendees added via **Other** with the same name and email addresses (or no email addresses) Minute Minder will inform you that a duplicate Contact has been selected. In this situation deselect one of the duplicate entries to continue.

### Inviting Meeting Attendees Who Are Not In Contacts

If there is a person not listed in the Contacts list who you wish to invite to the meeting then the **Other** button should be used on the **Attendees** dialog.

#### To enter an invitee who is not listed in Contacts:

1. Press the **Other** button on the **Attendees** dialog.
2. **Name** allows entry of the invitee's name.
3. Use **Job Title** to optionally describe their role within an organisation.
4. **Department** provides optional entry to describe the department the person works for within an organisation.
5. **Company** describes the organisation they work for.
6. **Work tel** provides optional entry of the person's telephone number.
7. **E-mail** allows entry of the persons email address. This email address will be used when the meeting invite is sent, and therefore is important to be entered correctly.
8. The **Add To Contacts** button will save the details entered to your mobile device to **Contacts** and close the **Other** dialog. Alternatively pressing OK will add this attendee to your list of invitees without saving the details to **Contacts**.

Minute Minder 10:29 OK

Attendee Details

Name: Steve Pipe

Job title: QA Analyst

Department: R&D

Company: Raspberry Software

Work tel: 3324

E-mail: steve.pipe@raspberrysoft











Add To Contacts

The name of the person you have just created will appear on the list allowing you to invite this person to the meeting.



Minute Minder uses the persons name and email address to provide a unique reference point to the person selected. If you have a two Contacts or Attendees added via **Other** with the same name and email addresses (or no email addresses) Minute Minder will inform you that a duplicate Contact has been selected. In this situation deselect one of the duplicate entries to continue.

Each Contact will have an icon displayed beside each person's name.

	Indicates that the person exists within Contacts and has one email address associated with its entry.
	<p>Indicates that the person exists within Contacts and has more than one email address associated with its entry. By default the first populated email field will be used by Minute Minder in precedence order email1, email2 or email3. Alternatively a choice can be made as to which email address should be used for the purposes of sending the meeting invite.</p> <p>To make this selection click and hold on the person's name, this will result in a menu of available email addresses being displayed allowing the user to select one of the email addresses. Having made this selection the icon will change to show either a ,  or  indicating whether <b>email</b>, <b>email2</b> or <b>email3</b> is used respectively.</p> <p>Making no selection will assume the email address stored in the <b>email</b> field.</p>
	Indicates that the person exists within Contacts however the Contact has no email address associated with its entry. If selected this Contact will need to have an email associated with its entry in order for the intended attendee to be invited to the meeting.
	Indicates that the person does not exist within Contacts but instead has been added using the <b>Other</b> button. See below.
	Indicates that the person does not exist within Contacts but instead has been added using the <b>Other</b> button however no email has been provided. See below.
	Indicates that the person does not exist within Contacts and has been created automatically as this is the Owner of the mobile device. See Minute Minder Options.
	Indicates that the person does not exist within Contacts and has been created automatically as this is the Owner of the mobile device however no email information is available for this person. See Minute Minder Options.



In order for Minute Minder to successfully send the Calendar invite, all contacts included in the meeting invite must have a valid email address. Attendees who do not have an email address, or who have an invalid email address, will not receive an invitation to the meeting.

When all required and optional attendees have been selected click on the OK button to save the attendee invites and return to the **Setup Meeting** dialog. The **Setup Meeting** dialog will display the number of Required and Optional attendees you have created for your meeting.



If additional attendees decide to join the meeting there is an opportunity of creating new attendees from the Minutes dialog. See Taking the Minutes chapter.

### Creating a Meeting Agenda

We have now determined the title for our meeting, selected a date and time for the meeting and chosen who we wish to invite. The next step is to create Agenda items for the meeting.

Minute Minder allows you to create agenda items, associate these agenda items to an owner and optionally specify how long the agenda item should be discussed in the meeting.

To create Agenda items select **Set...** from **Agenda** of the **Setup Meeting** dialog, the following dialog will be displayed.

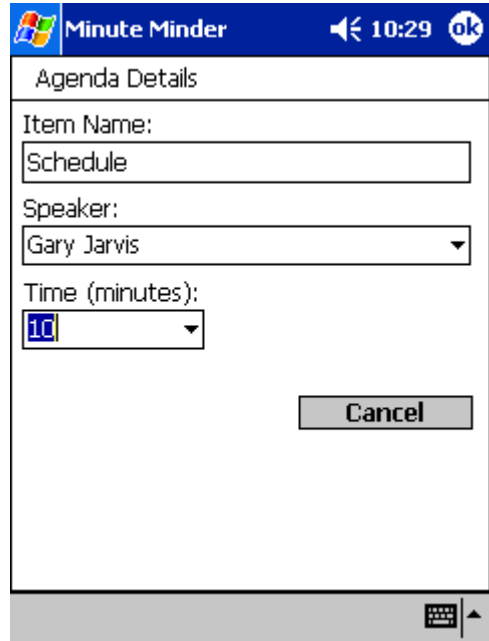


This dialog not only allows creation of agenda items with associated owners and times but also allows choice of the sequencing of Agenda Items.

# Minute Minder

## To create agenda items:

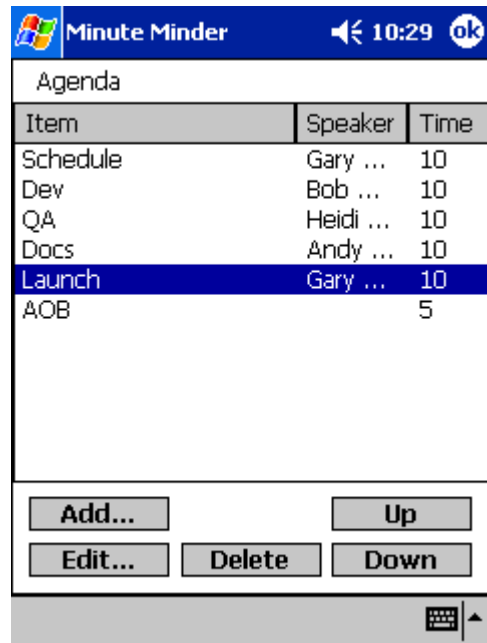
1. Select **Add** from the **Agenda** dialog to present the **Agenda Details** dialog
2. Enter the subject of the Agenda item into **Item Name**.
3. Optionally select a speaker for this agenda item from the **Speaker** list. Only people selected as Attendees of the meeting will appear in this list as these will be notionally the only people attending your meeting.
4. Optionally select or enter a time allocated to this agenda item using the **Time (minutes)** field.
5. On completing your agenda item creation, select **OK** to close the Agenda Details dialog. Your Entry will be appended to the Agenda list.
6. Repeat the steps above until all Agenda Items have been created.



### Removing Agenda Items

**To remove agenda items:**

1. Click on the Agenda item you wish to remove from the Agenda list.
2. Press the **Delete** button to permanently delete the selected Agenda item. The Agenda item will be removed from the Agenda list.



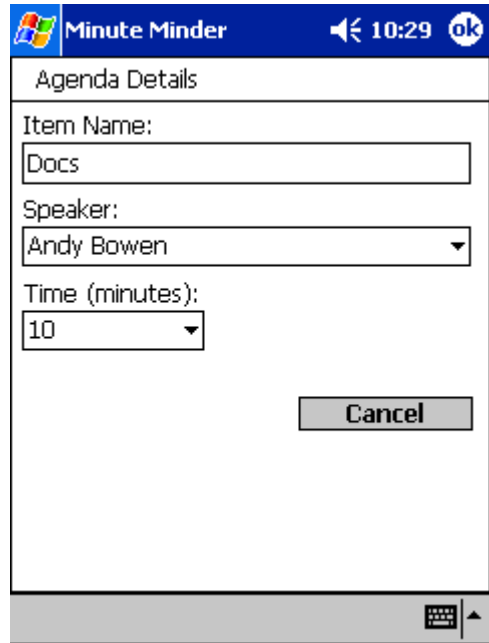
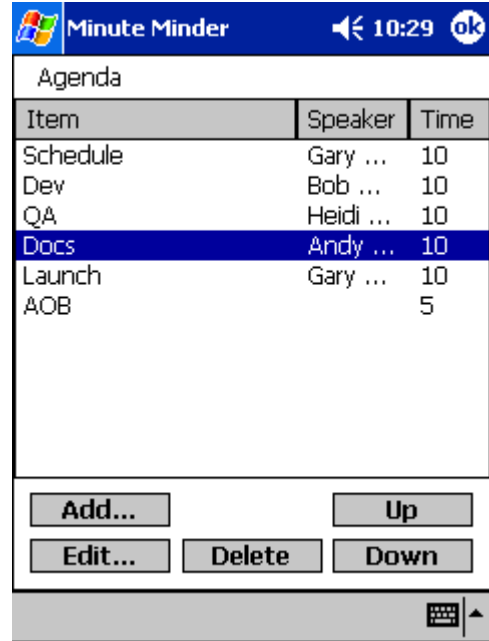
Using the example above agenda item **Launch** will be removed from the meeting schedule.

## Modifying Agenda Items

Having entered our agenda items it is likely you may wish to revisit some of these agenda items to make amendments.

**To modify agenda items:**

1. Click on the Agenda item you wish to edit using the agenda list.
2. Press the **Edit** button to open the Agenda Details dialog. The dialog will be automatically populated with the item you chose to edit.
3. Use the **Item Name**, **Speaker** and **Time (minutes)** fields to make the necessary adjustments to the selected Agenda Item.
4. Use the **OK** button to save the changes or alternatively press **Cancel** to dismiss the changes.

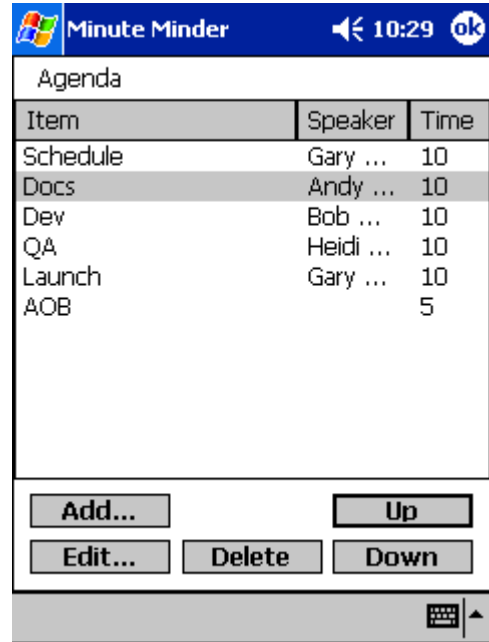


## Determining Agenda Item Order

It is possible that the order in which Agenda Items have been entered into Minute Minder is not the order by which the meeting should be conducted. Minute Minder provides **Up** and **Down** buttons to facilitate altering the sequence of agenda items. Using our example above it transpires that Andy Bowen needs to leave the meeting early and has therefore requested that his **DOCS** agenda item be moved to the beginning of the meeting.

**To change Agenda the order:**

1. Click on the Agenda item you wish to move either up or down the agenda list.
2. Use the **Up** button to move the item up one in the Agenda list. When the Agenda items reaches the top of the list this button will set to unavailable.
3. Use the **Down** button to move the item down one in the Agenda list. When the Agenda items reaches the bottom of the list this button will set to unavailable.



To move the **DOCS** agenda item to be the second agenda item within our meeting, click on **DOCS** within the agenda list and then press the **Up** button twice.

Once all agenda items have been created and the sequencing determined then press **OK** to save changes. On saving the changes Minute Minder will verify the total time for all agenda items does not exceed the duration of the meeting. If the total agenda items exceeds the meeting time then a warning message will be presented inviting the user to either extend the meeting time to accommodate the agenda items or allow the user to adjust the agenda item times to fit the meeting time.

Having created our Meeting the next step in the process is to book the meeting by sending out calendar invites to our Required and Option attendees.

This chapter guides you through the simple steps of sending meeting Invites.

## Booking the Meeting.

Having created a title, chosen a time for, selected attendees and created an agenda for the meeting the next step in the process is to Book the meeting by sending out a meeting invite.

The act of booking the meeting will place a Calendar invite in each attendees Inbox for them to accept or decline. The content of the Calendar invite will contain:

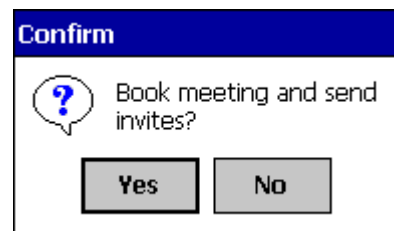
- A list of all the Attendees of the meeting
- The Date/Time the meeting is scheduled for.
- The Agenda with Speakers and Times.

Before booking the meeting ensure you have chosen the correct attendees, selected the correct date/time and created all the agenda items and placed them in the correct sequence.

Finally ensure that each of your attendees has a correct email address associated with them. It will be this email address that is used to send the meeting booking. (Refer to Creating A Meeting)

### To Book the meeting invite:

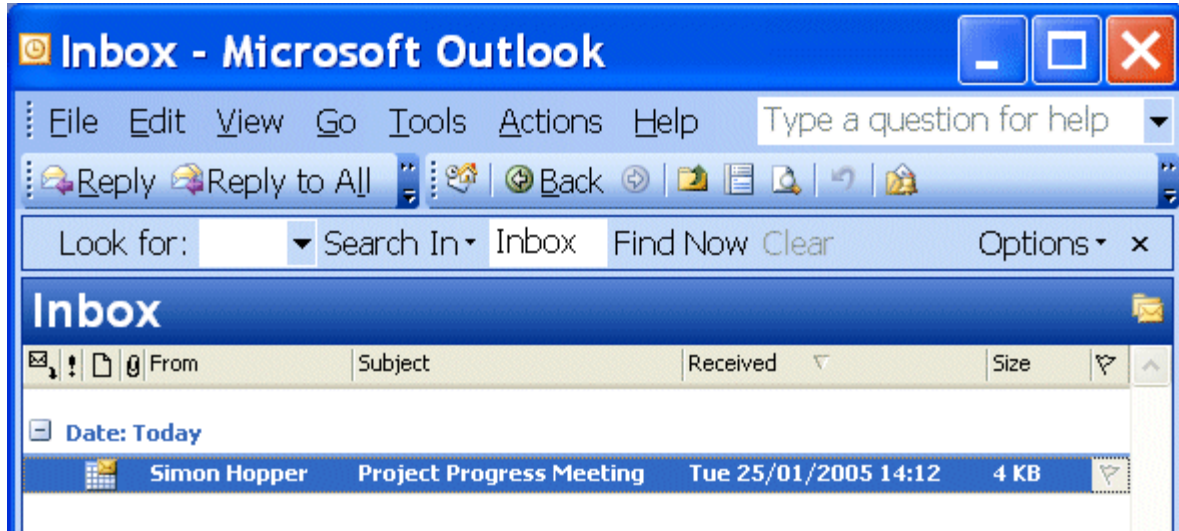
1. Select **Book** from the **Tools** menu of the **Setup Meeting** dialog.
2. A confirmation prompt will be presented to ensure you wish to send the meeting invite. Press **Yes** to send the meeting invite or **No** to abandon the Booking.



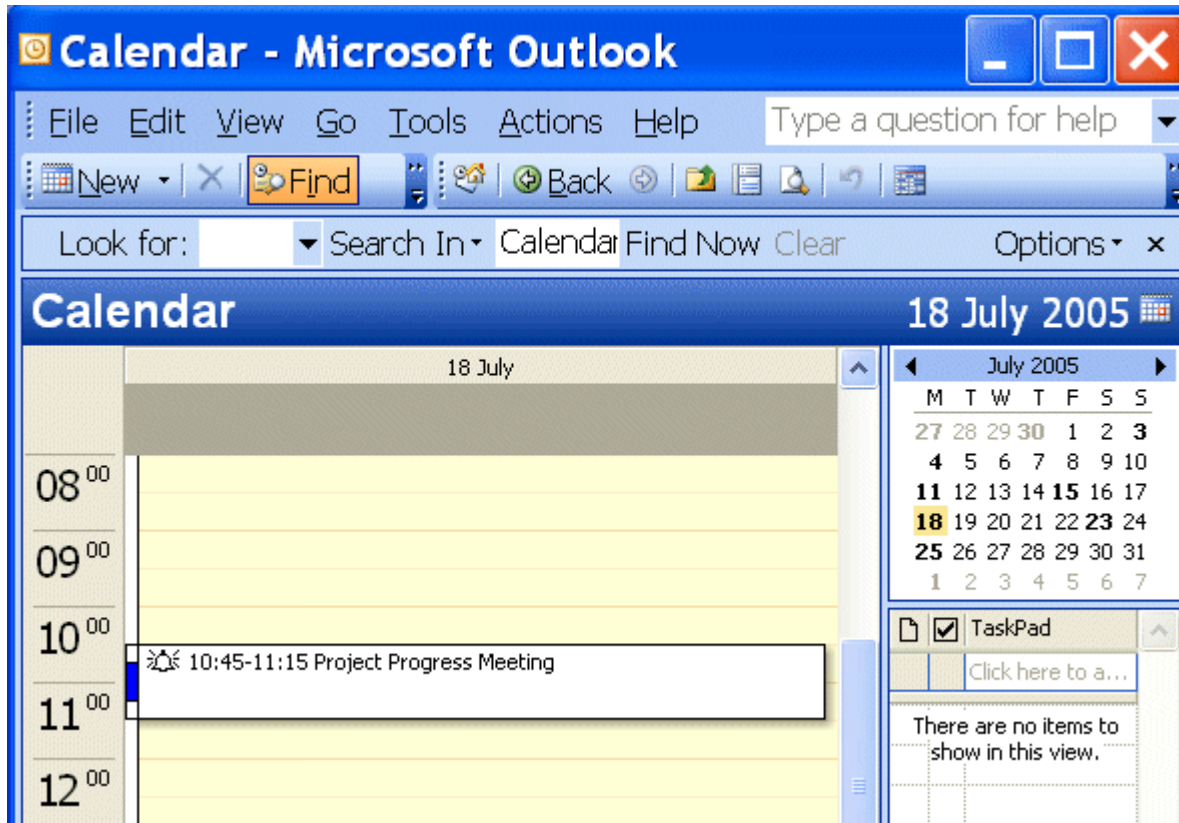
## Minute Minder

---

Minute Minder will use ActiveSync to post the meeting invite. The invite for the meeting will appear within each attendees Inbox as follows (Microsoft Outlook client used as an example):



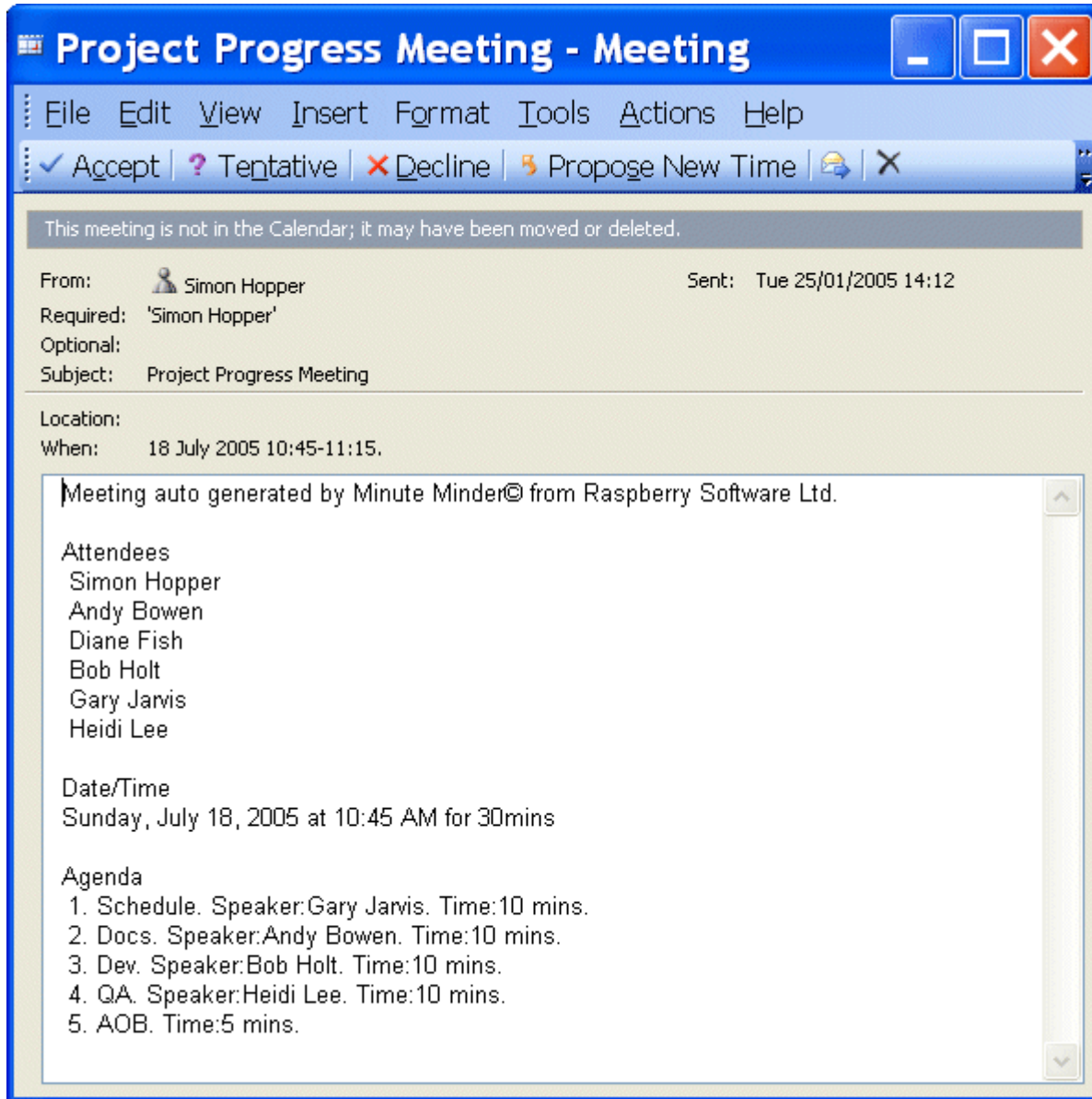
The meeting will be booked to each attendees Calendar as follows (Microsoft Outlook client used as an example):



## Minute Minder

---

The Calendar invite will provide all the necessary details about the scheduled meeting in order for an attendee be fully prepared to attend and contribute to the meeting.



Simply press **Accept** to confirm you will be attending the meeting or **Decline** to reply back to the sender that you will not be able to attend.

You have now created your meeting and booked it with your colleagues. You are now fully prepared and you have primed your colleagues as to the purpose of the meeting and who will be attending.



When the meeting is booked, there is currently no programmatic way of setting an attendee as Optional within a Calendar invite as this flag is not accessible on the mobile device. Instead Optional Attendees will be flagged as optional in the body text of the meeting invite.

# Taking Meeting Minutes

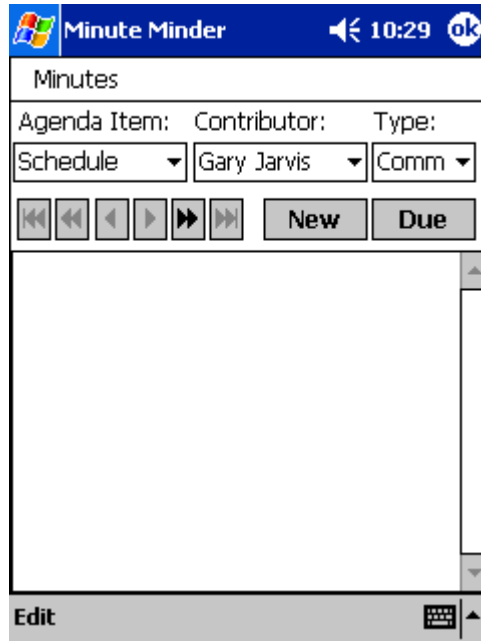
It is very rare that meetings are conducted at the speed by which minutes can be taken. Minute Minder provides an efficient mechanism for recording minutes against agenda items. It is also recognised that often minutes need to be revisited to add additional details. Minute Minder provides a sophisticated navigation mechanism to navigate through previously taken minute notes or skip to notes to complete agenda items.

This chapter guides you through the process of taking minutes within a meeting, it describes the process of entering minutes against a given agenda item and describes the process of navigating through previously taken minutes.

## Minute Minder

---

Having successfully scheduled our meeting we are now ready to take minutes within the meeting. Select **Minutes** from the **Edit** menu. You will be presented with a dialog similar to the following:



The following sections describe the main controls on this dialog and their usage.

### Agenda Items & Contributors

The **Agenda Item** dropdown list contains all the agenda items we scheduled for our meeting and the sequence in which they will be discussed within the meeting.

New Agenda items can be created from the **Agenda Item** dropdown list. See Creating New Agenda Items and New Contributors.

The **Contributor** dropdown list contains a list of all mandatory and optional attendees associated with the meeting. By default the Contributors name will default to the Speaker of the Agenda item that we created in the Creating Meetings chapter. The Contributors name can be overridden by selecting another person from the **Contributor** list.

Additional Attendees may attend the meeting than were originally invited. It is often important to record who attended the meeting for later reference. In order to avoid having to revisit the **Meeting Setup** screen Minute Minder provides a shortcut facility for you to add additional Attendees using **<new>** from the **Contributor** dropdown list of the Minutes Screen. See Creating New Agenda Items and New Contributors.

### Minute Categories

The **Type** dropdown list details the type of minute being taken; there are three categories to choose from:

Minute Type	Description
<b>Action</b>	<p>A minuted item should be marked as Action when a task is placed upon a person. An Action usually has associated with it a time by which the Action should be completed. For more details on setting the completion time on an Action please refer to the <b>Due</b> button below. An example of an Action might be:</p> <p><i>Gary Jarvis to complete first draft of Documentation by 26<sup>th</sup> July</i></p>
<b>Comment</b>	<p>A Comment provides a record of something someone has said in a meeting. An example of a Comment might be:</p> <p><i>Gary Jarvis stated that the Import chapter of the product is now complete.</i></p>
<b>Decision</b>	<p>A Decision provides a record of where consensus was agreed around a particular item being discussed. An example of a Decision might be:</p> <p><i>The project team agreed that the product needs to be released by Christmas if we are not going to miss market opportunity.</i></p>

## Navigating Minuted Items

While it would be nice to imagine that meetings followed the sequence of agenda items created prior to the meeting, in reality this typically is not the case. It is not uncommon that Agenda items will be discussed out of order and/or revisited many times during the meeting. Minute Minder provides a series of powerful navigation buttons to guide you through previously taken minutes.

The navigation buttons provide a quick and easy method allowing access to previously entered minutes records. Consider that the following sequence of Minutes have been taken against the following agenda:

1. Schedule
2. Docs
3. Dev
4. QA
5. AOB

Sequence of Minutes Recorded	Minute Text	Agenda Item	Contributor	Type
1	Code Complete 2 weeks behind schedule.	Schedule	Gary Jarvis	Comment
2	QA complete 3 weeks behind schedule due to illness	Schedule	Heidi Lee	Comment
3	Documentation sent to translators	Docs	Andy Bowen	Comment
4	Documentation now adheres to the new style guide.	Docs	Andy Bowen	Comment
5	Documentation expected to be 3 weeks ahead of schedule	Schedule	Andy Bowen	Comment
6	QA have 250 bugs to recheck as a result of developer bug fixing	QA	Heidi Lee	Comment
7	All automated testing has been completed.	QA	Heidi Lee	Comment
8	Scaleability testing cannot start until Code Complete has been declared	QA	Heidi Lee	Comment
9	Launch party preparations are underway	AOB	Gary Jarvis	Comment
10	Forgot to mention I will be on vacation for the next two weeks	QA	Heidi Lee	Comment





The following describes the action of the navigation buttons using the above minute sequence as an example of each navigation buttons use.

## Minute Minder

	Action	Examples(s)
▶	<p>Moves to the next minute note in the sequence of the current agenda item.</p> <p>If on the last available minute note within any given agenda item, this button will be unavailable.</p>	<p>If on minute note 2 pressing ▶ will move to minute note 5 as the next available note on Schedule was entered as note 5</p>
◀	<p>Moves back to the previous minute note in the sequence of the current agenda item.</p> <p>If on the first available minute note within a given agenda item this button will be unavailable.</p>	<p>If on minute note 4 pressing ◀ will move back to minute note 3 as this minute note is the previously recorded minute note against Docs</p>
▶▶	<p>Moves to the last minute note of the next Agenda item. The next agenda item is governed by the order in the <b>Agenda Item</b> dropdown list.</p> <p>If the next agenda item has no minute notes associated with it then a new note will be presented for this agenda item. If no text is entered against this note and a new note is navigated to then this note will not be saved.</p> <p>If on the last agenda item then this button will be unavailable.</p>	<p><u>Example 1</u> If on minute note 1 pressing ▶▶ will move to minute 4. This is governed by the fact that Docs is the next agenda item after Schedule and minute 4 is the last recorded minute note against Docs .</p> <p><u>Example 2</u> If on minute note 4 pressing ▶▶ will present a new minute record for Dev. This is determined by the fact that Dev is the next agenda item after Docs however given no minutes notes have been created for Dev then a new record is presented for minute entry. This note will only be saved if text is entered into the notes area of this record.</p>
◀◀	<p>Moves to the last minute note of the previous Agenda item. The previous agenda item is governed by the order in the <b>Agenda Item</b> dropdown list.</p> <p>If the previous agenda item has no minute notes associated with it then a new note will be presented for this agenda item. If no text is entered against this note and a new note is navigated to then this note will not be saved.</p> <p>If on the first agenda item then this button will be unavailable.</p>	<p><u>Example 1</u> If on minute note 9 pressing ◀◀ will move to minute 10. This is governed by the fact that QA is the previous agenda item before AOB and minute note 10 is the last recorded minute note against QA .</p> <p><u>Example 2</u> If on minute note 7 pressing ◀◀ will present a new minute record for Dev. This is governed by the fact that Dev is the previous agenda item before QA however given no minutes notes have been created for Dev then a new record is presented for minute entry. This note will only be saved if text is entered into the notes area of this record.</p>

## Minute Minder

---

	<p>Moves to the last minuted note of the last agenda item.</p> <p>If on the last minute note of the last agenda item or there are less than two minute notes then this button will be unavailable.</p>	<p>If on minute note 4 pressing  will move to minute note 9 which is the last minuted item of the last agenda item.</p>
	<p>Moves to the first minuted note of the first agenda item.</p> <p>If on the first minute note of the first agenda item or there are less than two minute notes then this button will be unavailable.</p>	<p>If on minute note 4 pressing  will move to minute note 1 which is the first minuted item of the first agenda item.</p>

## New and Due

The **New** button creates a new minute note. By default the agenda item for the previous minute note will be used as the default agenda item for the new note however this can be overridden by simply selecting an alternative agenda item from the **Agenda Item** dropdown list.

The **New** button will append a new note at the end of the current agenda item.

The **Due** button allows a date to be entered against an agenda item. A Due date can only be recorded against Action agenda items to indicate the target date the action is to be completed. On entering a Due date a calendar control the same as that described in Chapter 5 will be presented.

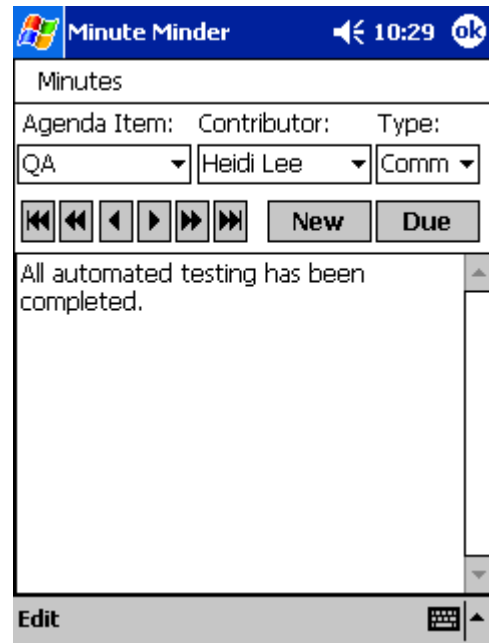
## Note Text

The text box provides an area to record minuted text for any given agenda item. Text is entered using your preferred IME data entry devices.

### Adding Minute Notes

#### To enter a new minute:

1. Click on the **New** button, this will present a new minute record for data entry.
2. Select the **Agenda Item** the minuted note refers to if it is different to the default one displayed.
3. Select the **Contributor** who provided the minute information within the meeting if it is different to the default one displayed.
4. Select the **Type** to indicate whether the minute refers to a **Comment, Decision** or an **Action**.
5. If the **Type** refers to an **Action** optionally select a **Due** date the action is to be completed by.
6. Finally enter the text that represents the minute into the text field.
7. To save the minuted note either click on OK to close the **Minutes** dialog, press **New** to enter a new record or navigate to a previously minuted note using the navigation buttons.

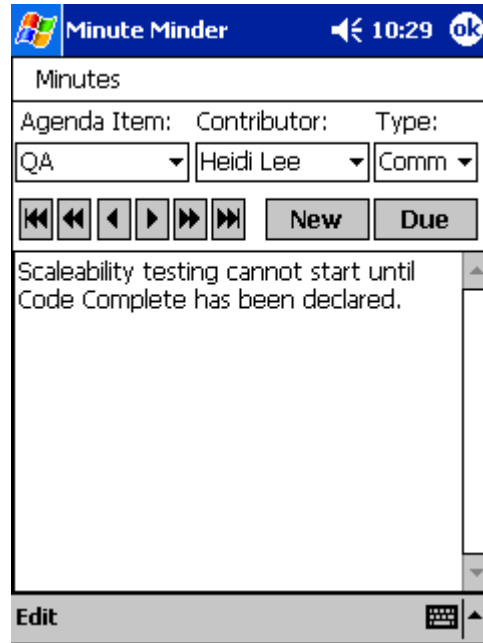


## Modifying Minute Notes

It is not uncommon for previously minuted items to be revisited to remind attendees of the meeting what was said or to add or amend information.

**To modify a previously entered minute note:**

1. Use the navigation button to locate the minute note that requires modification. Refer to Navigating Minuted Items.
2. The **Minutes** dialog will be populated with the details of the minuted item displaying the **Agenda Item, Contributor, Type** and **Minuted Text**.
3. Make alterations to the **Agenda Item, Contributor, Type** and **Minuted Text** fields as required.
4. To save the minuted note either click on OK to close the **Minutes** dialog, press **New** to enter a new record or navigate to previously minuted note using the navigation buttons.



If altering the **Agenda Item** for a previously taken minute it should be noted that the order by which the minuted note will be navigated using the navigation button will change. Refer to Navigating Minuted Items.

## Manipulating Notes Text

The **Edit** menu provides a number of options to manipulate the notes text. These options again assist in fast note taking which is essential in a meeting notes taking environment. The following table provides details on the functionality of each **Edit** menu option.

Edit menu option	Functionality
<b>Undo</b>	Undoes any previous data entry in the text of the minute note.
<b>Redo</b>	Reapplies what was previously undone with <b>Undo</b> .
<b>Cut</b>	<b>Cut</b> is only available when text has been highlighted. <b>Cut</b> will remove the selected text from the note and save it to the clipboard.
<b>Copy</b>	<b>Copy</b> is only available when text has been highlighted. <b>Copy</b> saves the selected text to the clipboard. Unlike <b>Cut</b> the text is not removed from the meeting note.
<b>Paste</b>	<b>Paste</b> is only available when there has been something saved to the clipboard

## Minute Minder

---

	either via using <b>Cut</b> or <b>Paste</b> from Minute Minder or via another clipboard compliant application. <b>Paste</b> will insert the text within the clipboard into the text from the position of the cursor within the Notes text.
<b>Clear</b>	<b>Clear</b> will remove all text from the notes text.
<b>Select All</b>	<b>Select All</b> will highlight all Notes text. This is a useful feature if you want to copy the contents of one Note to another if used in conjunction with <b>Copy</b> .
<b>Find/Replace</b>	<b>Find</b> will prompt the user to enter some text to find within the Note. On selecting OK you will be able to step through all occurrences of that text. This operation will apply to all Notes entered.  <b>Replace</b> will prompt the user to enter some text to find within the Note and some text to replace it with. On selecting OK all occurrences of the find text will be replaced by the replace text. This operation will apply to all Notes entered.

## Saving New and Modified Minute Notes

To facilitate ease of use Minute Minder is set to be in a permanent editable state. What this means is that as a previous entered minute note is navigated to the note is available to be edited. As the user closes the **Minutes** dialog, presses the **New** button or navigates to a different note then this action will automatically save the current note.

Similarly if a new minute note is entered using the **New** button then this note is automatically saved as the **Minutes** dialog is closed or a previous note is navigated to. The only exception to this rule is if no minute text is entered against a note in which case the note will be discarded as the dialog is closed or a previous record is navigated to.



Notes can be removed from the system by removing all the text of a note and then navigating away from that note.

## Creating New Agenda Items and New Contributors

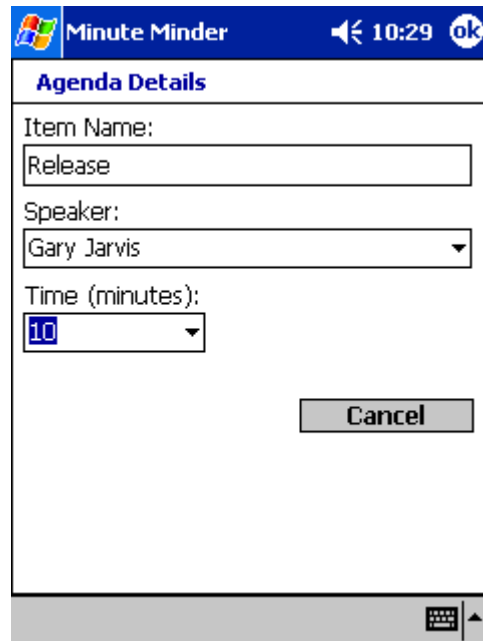
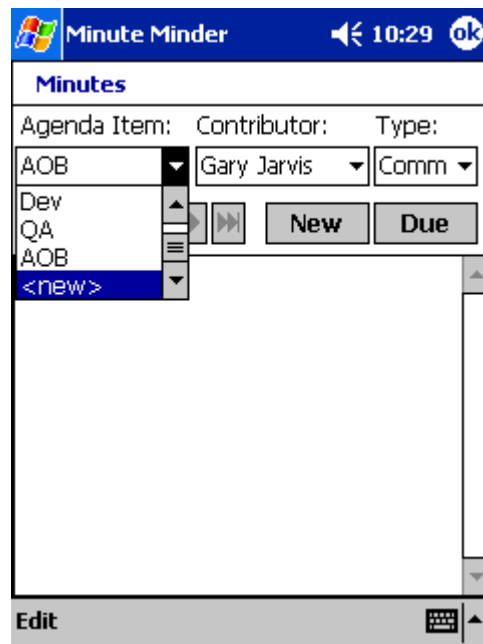
It is not uncommon for new agenda items to be raised during meeting or on occasions additional attendees attend the meeting. It is important to have a means of creating these new items quickly from within Minute Minder without having to exit the notes taking screen.

### To create a new Agenda Item from the Minutes dialog:

1. Select **<new>** from the **Agenda Item** dropdown list.
2. The **Agenda Details** screen will be presented for you to append a new agenda item to the meeting.
3. Enter the subject of the Agenda item into **Item Name**.
4. Next select a speaker for this agenda item from the **Speaker** list. Only people selected as Attendees of the meeting will appear in this list as these will be the only people attending your meeting.
5. Optionally select or enter a time allocated to this agenda item using the **Time (minutes)** field.
6. Use the **OK** button to save the changes or alternatively press **Cancel** to dismiss the changes.

NOTE1: If the new Agenda Item is to be associated with a person who was not originally invited to the meeting then this person will need to be added as a Contributor before the new agenda item is created. (See below).

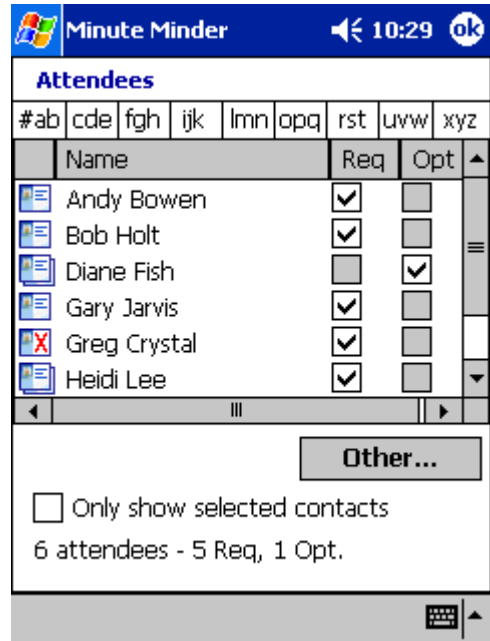
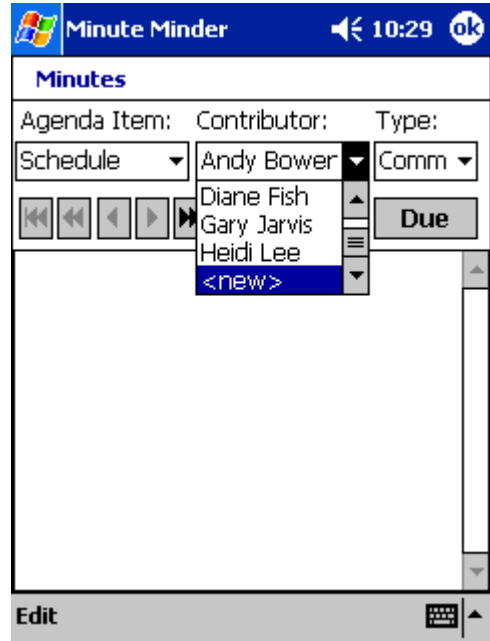
NOTE2: If you are currently editing a note, e.g. you have some notes text associated with the note then selecting **<new>** agenda item will effectively change the agenda item for that note. If this is not what is desired then the **New** button must be used to create a new note prior to using the **<new>** option in the agenda item list.



**To add an additional Contributor to the meeting from the Minutes dialog:**

1. Select **<new>** from the **Contributor** dropdown list.
2. The **Attendees** screen will be presented for you to select a new Attendee.
3. Select either the **Req** or **Opt** checkboxes to add new attendees to the meeting.
4. If an invitee does not appear within this list then use the **Other** button to add additional attendees. (Refer to section of 'Creating a Meeting' chapter)
5. Use the **OK** button to return to the **Minutes** screen. If additional **Attendees** were selected then these will appear in the **Contributor** dropdown list of the **Minutes** screen.

NOTE1: If you are currently editing a note, e.g. you have some notes text associated with the note then selecting to create a **<new>** contributor will effectively change the contributor for that note. If this is not what is desired then the **New** button must be used to create a new note prior to using the **<new>** option in the Contributor list.



# Distributing Meeting Minutes

---

7

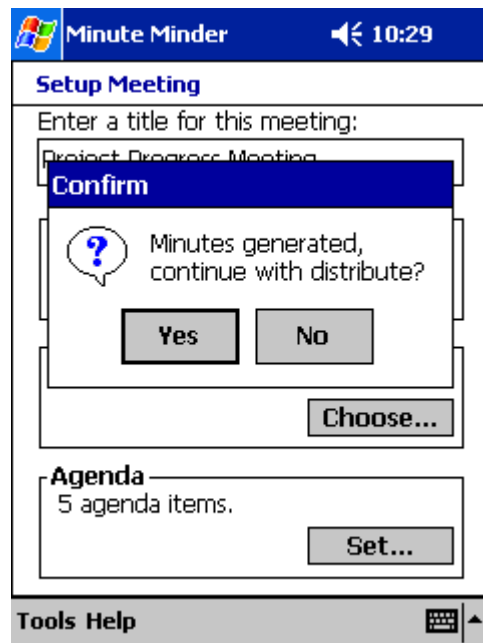
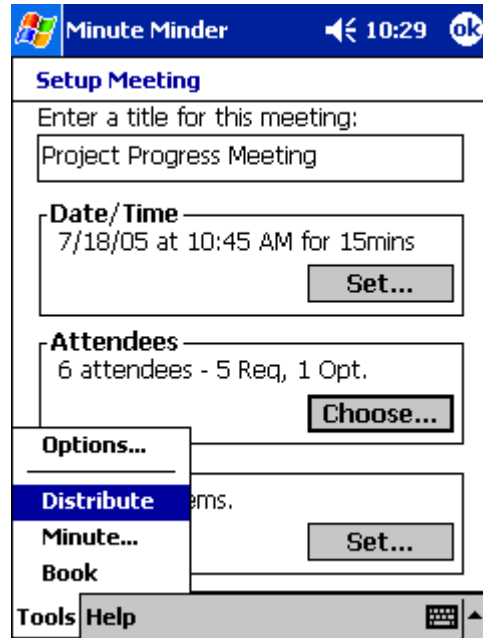
This chapter details how meeting minutes recorded within Minute Minder can be distributed to all Attendees of the meeting. The minutes will automatically be processed into formatted minutes using the output preference and template supplied within **Tools Options**.

## Steps Performed As Part Of The Distribute Process.

One of the powerful features of Minute Minder is its ability to automatically generate formatted minutes from the minute notes taken in the meeting. No longer do you need to spend hours trying to read your hastily scribbled notes from the meeting and re-entering these into a word processor in order to produce formatted minutes. A simple selection of a menu item in Minute Minder will generate these minutes for you and distribute them to all attendees of the meeting.

### To Distribute the Minutes:

1. Select **Distribute** from the **Tools** menu from the **Setup Meeting** dialog.
2. A prompt will be displayed informing the user the minutes have been generated and saved to the mobile device. A question is then asked if you wish to send the minutes at this time or defer the sending to a later time. Select **Yes** to send the minutes or **No** to defer the send operation. If the user chooses to send the minutes then all attendees of the meeting will be sent the minutes as a mail attachment. Minute Minder will inform the user when the minutes have been sent.



## Minute Minder

---

Completing the above operation will perform the following actions:

- The Output format (RTF or Plain Text) and the Template (RTF only) selected in **Tools Options** will be used to generate the formatted minutes. All information created in the process of creating the meeting and recording the minutes will be pushed through the template to produce formatted minutes. The minutes file created by the template will be stored in My Device\Program Files\Raspberry Software\Minute Minder\Output\. The generated minutes file name will be the same name as the file that stored the meeting minutes but instead of having an .RSM file extension the file will have a .RFT or .TXT file extension depending on the output format selected by the user. The output directory provides the user an opportunity to review the minutes file before sending out the minutes. This file can either be viewed on the mobile device or via copying the file to the PC to review.



Amendments to the meeting minutes should be made by editing the minute notes using Minute Minder on the mobile device as this forms the master version of the minutes. When the Minutes are later regenerated and sent then all alterations will be honoured.



For more information regarding the format of the created minutes please refer to Chapter 10 Customizing Templates.

- Once the formatted minutes have been created and the user requests to send the minutes an email will be created with the formatted minutes attached. This email will be sent to everyone who was invited to the meeting.

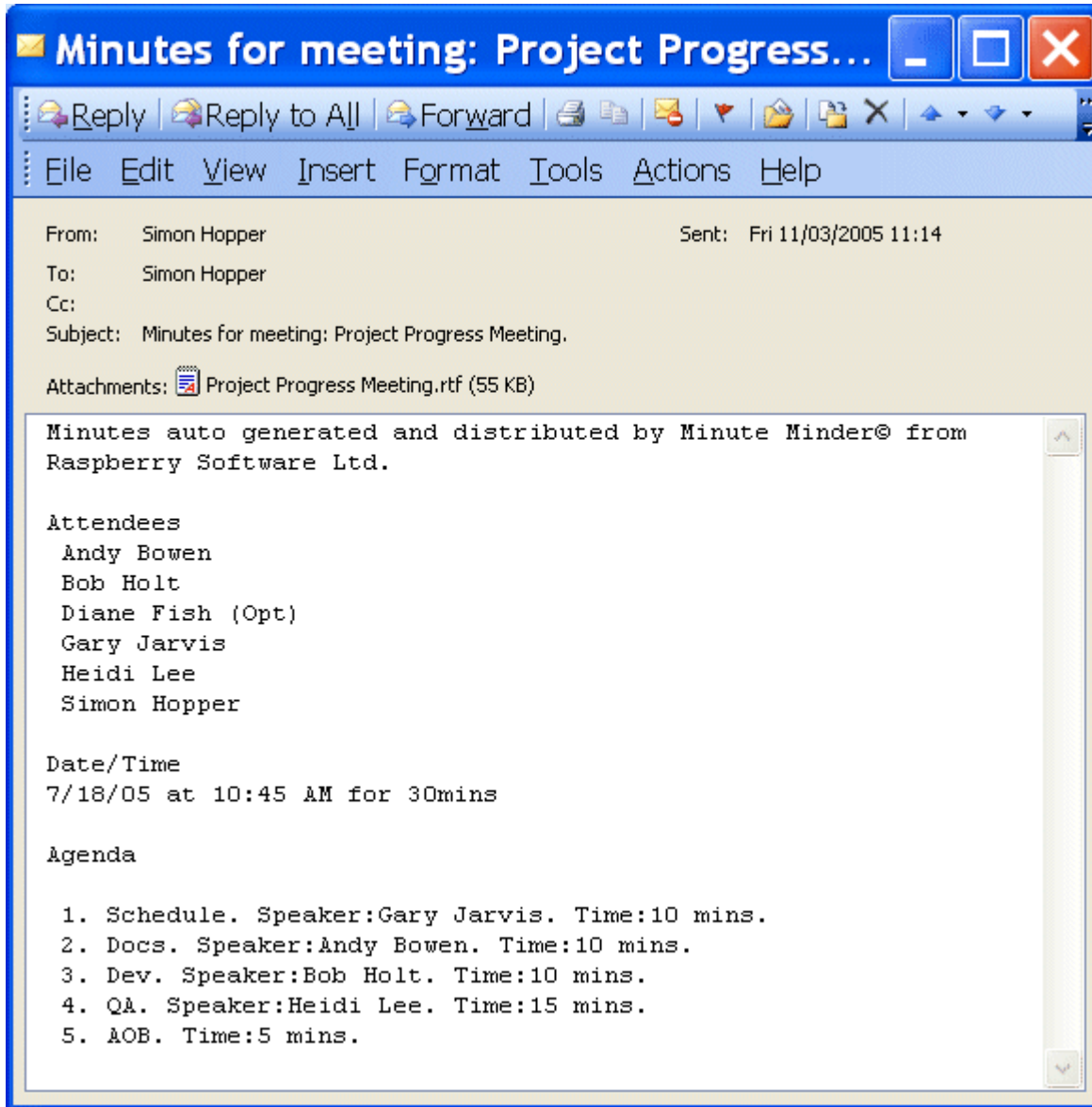


If the **Tools Distribute** option is executed more than once then the old output minute file generated in the Output directory will be overwritten by the new version.

## Minute Minder

---

An example of the email sent by Minute Minder is as follows:



# Minute Minder

---

An example of the formatted minutes attachment is as follows:

Start

Company Confidential

---

Minutes from the **Project Progress Meeting** held on **Monday, July 18, 2005** at **10:45 AM** and scheduled for **30mins**.

Those asked to attend the meeting were as follows:

Name	Required
1. Andy Bowen	Required
2. Bob Holt	Required
3. Diane Fish	Optional
4. Gary Jarvis	Required
5. Heidi Lee	Required
6. Simon Hopper	Required

The agenda set for the meeting was as follows:

Item	Sponsor	Time Allowed
1. Schedule	Gary Jarvis	10
2. Docs	Andy Bowen	10
3. Dev	Bob Holt	10
4. QA	Heidi Lee	15
5. AOB		5

## Minutes

Item. Type	Speaker	Note	Due Date
1.C	Gary Jarvis 10:20:54 AM	<b>Schedule</b> Code Complete 2 weeks behind schedule.	
2.C	Heidi Lee 10:22:33 AM	QA complete 3 weeks behind schedule due to illness	
3.C	Andy Bowen 10:25:56 AM	Documentation expected to be 3 weeks ahead of schedule	
4.C	Andy Bowen 10:27:00 AM	<b>Docs</b> Documentation sent to translators	
5.C	Andy Bowen 10:30:10 AM	Documentation now adheres to the new style guide.	
6.C	Heidi Lee 10:35:31 AM	<b>QA</b> QA have 250 bugs to recheck as a result of developer bug fixing	
7.C	Heidi Lee 10:36:36 AM	All automated testing has been completed.	

## Minute Minder

---

8.C	Heidi Lee 10:40:38 AM	Scaleability testing cannot start until Code Complete has been declared	
9.C	Heidi Lee 10:43:38 AM	Forgot to mention I will be on vacation for the next two weeks	
10.C	Gary Jarvis 10:45:27 AM	<b>AOB</b> Launch party preparations are underway	

This file 'Project Progress Meeting.rtf' was generated from 'Project Progress Meeting.rsm' on Friday, March 11, 2005, 11:25 AM.

---

End

Ever attended a meeting where at the last minute you have been volunteered to take the minutes? More often than not you scabble for your notepad and struggle to record the attendees names as well as note take as the meeting gets into full swing.

With Minute Minders “Quick Import” feature this is not longer an issue. Quick Import provides a facility for you to Import the current or next meeting from your calendar into Minute Minder.

This chapter guides you through this simple but powerful feature of Minute Minder.

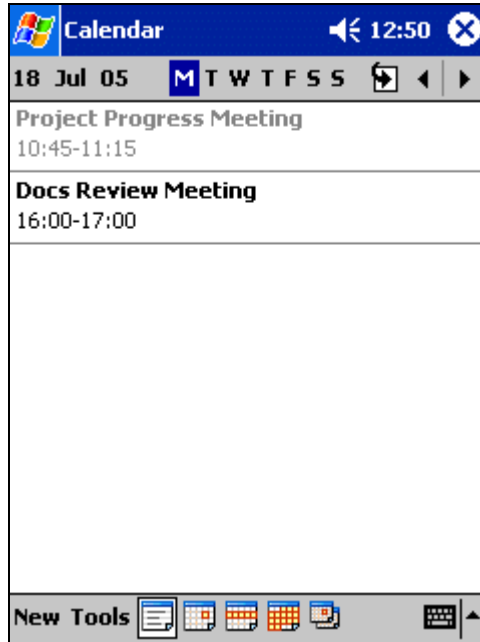
## Minute Minder

---

The **Quick Import** feature will create a new Minute Minder meeting by importing all the details it can from the current or next calendar appointment on your mobile device. This functionality provides a quick start to any meeting and avoids duplicated effort in entering data into Minute Minder that already exists elsewhere on your mobile device.

The Calendar appointment subject will be used as the title for the meeting. In addition all the invitees to the Calendar appointment will be imported into the imported meeting.

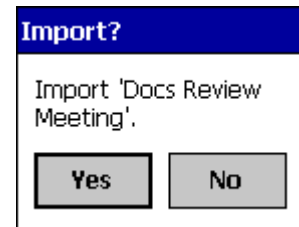
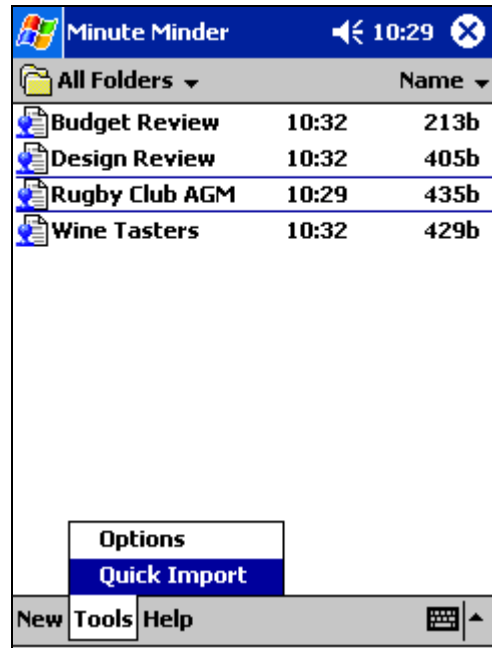
Imagine your Calendar looks as follows:



Notice the time is 12:50, our Project Progress Meeting has passed and our next appointment is at 16:00, Docs Review Meeting. Imagine you have been requested to take minutes in this meeting. **Quick Import** allows you to prepare for minute taking for this next appointment.

## To Import the next Calendar appointment into Minute Minder:

1. Select **Quick Import** from the **Tools** menu from the File List screen.
2. Minute Minder will determine the current or next appointment and provides a Yes/No dialog requesting whether this meeting should be imported.
3. Selecting **No** will abort the import process and return back to the File List Dialog.
4. Selecting **Yes** will create a new meeting.
  - The Subject of the Calendar appointment will be imported into the Meeting Title field.
  - The Date and Time of the Calendar appointment will be imported into the Date, Start/Finish time of the meeting.
  - The Attendees in of the Calendar appointment will be imported as Attendees of the meeting.



Once imported, the meeting can then be modified to create agenda items in readiness for the meeting.

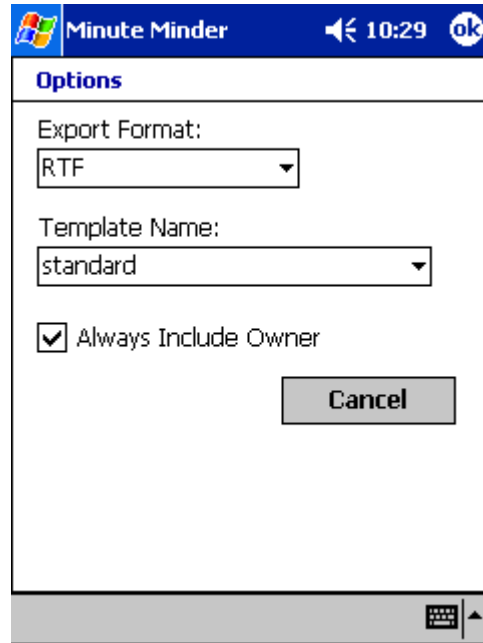
This chapter details the settable options from within Minute Minder.

## Settable Options

The Options setting within Minute Minder allows the user to set their preferred file format when distributing the meeting minutes and set whether the owner should be added as a default attendee when creating new meetings.

### To change the Options within Minute Minder:

1. Select **Options...** from the **Tools** menu from the **File List** screen OR select **Options...** from the **Tools** menu from the **Setup Meeting** screen.
2. Use the **Export Format:** dropdown list to choose between distributing minutes as RTF format or Plain Text.
3. If RTF format has been selected then you can optionally select the Template Name you wish the output to be produced in the style of.
4. Finally check the **Always Include Owner** checkbox if you wish Minute Minder to automatically create the owner of the device as an attendee of the meeting. If this checkbox is unchecked then the owner of the mobile device will not automatically be created as an attendee of new meeting.



RTF stands for Rich Text Format and is a format supported by Microsoft Word and Microsoft Wordpad (available on most operating systems). As the name implies RTF allows text to be formatted to produce rich output. The types of formatting supported include:

- Bold/Italic/Underline
- Colours
- Tables
- Fonts & Sizes

Plain Text supports no formatting characteristics and supports only fixed width fonts. The advantage of using Plain Text over RTF is that the files produced are ASCII and hence can be read by many applications.

One Template is provided with Minute Minder that produces well formatted minutes. Minute Minder provides a powerful means of adding your own Templates to suit different situations. Refer to Customizing Templates within the Distributing Meeting Minutes chapter.

The options set are global and hence apply to all Minute Minder files that are opened.

## Minute Minder

---

If the **Always Include Owner** option is checked then the Name and Email address of the mobile device is read from Owner Information (Start Menu, Settings, Owner Information) and used to create an automatic attendee when new meetings are created. The owner of the meeting is denoted by a green icon in the Attendee list if the owner is not already in Contacts in which case it will align to Contacts.

This option is useful as by default the creator of the meeting is not created as an attendee and therefore would need to be explicitly included as an Attendee by selecting them from Contacts or creating them as an **Other** attendee.

This option has no effect when creating a meeting via Quick Import as in this situation the owner of the meeting is automatically read from Calendar invite.



If the mobile Device Owner Information contains no data in the Name field then not attendee is automatically created.



The Owner Information is read in by Minute Minder at the point Minute Minder is started. If you change the Owner Information be sure to stop Minute Minder from running in memory in order for it to recapture the new Owner information the next time it is started.

# Customizing Templates

10

---

By default Minute Minder ships with one predefined Minutes Template, Standard.rtf. However a sophisticated template generation process is available to allow users to create their own customized templates in order to use different output templates to suit different situations. This chapter guides you through the process of creating the templates.

# Minute Minder

---

The format the Minutes are created in is determined by the Template file currently selected within the Tools Options menu (See Minute Minder Options chapter). By default Standard.rtf is used within Minute Minder, however, this chapter guides you through creating your own custom templates.

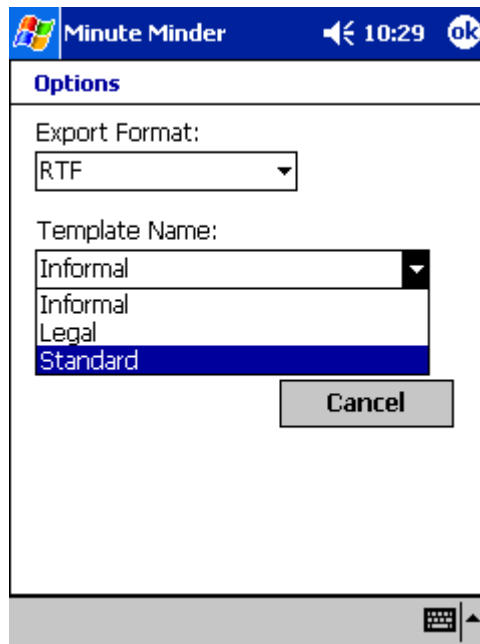
Minute Minder provides a mechanism for users to create their own Template files. For example the format of minutes produced for a Rugby Club AGM might be different to the format required within a Business Meeting.

Template files contain a number of tags that signify the data to be output within the formatted Minutes document. These tags can be formatted to create a rich Minuted Output document.

New Templates must be produced as .RTF files (supported by Microsoft Word and Microsoft Wordpad). Once created these files must be uploaded to the Templates directory of the Minute Minder install. Typically this is within the following location

My Device\Program Files\Raspberry Software\Minute Minder\Templates

For example uploading new Template files Legal and Informal to the above location on your device would present these new templates as selectable within Tools Options.



**Under no circumstances should the Standard.rtf template be modified.**



It should be noted that if creating your Customized Template using Microsoft Word the RTF file created by Word may contain a number of additional pieces of information not visible to the user. For example if modifying a file, change history is automatically added to the RTF files without the user knowing. These automatic insertions into the file could cause issues within Minute Minder. It is highly recommended that once the Customized Template has been created using Word it be opened and saved using Microsoft WordPad. WordPad will automatically filter out the additional content added by Microsoft Word creating a purer RTF Template file.

The remainder of this chapter will describe the generation of a new Template file and detail the Minute Minder tags that can be contained within it.

## Template Tags

An example of a Tag within a Template file is as follows:

Minutes from the **^meeting\_name^** held on **^meeting\_long\_date^**

Once invoked via the **Tools Distribute** option this would produce formatted minutes as follows:

Minutes from the **Sales Meeting** held on **Sunday, March 31, 2005**

This simple example highlights a number of rules associated with tags.

1. All tags are enclosed within the an opening ^ and a closing ^ character
2. The text enclosed within the ^ characters has to be text that means something to Minute Minder. Using our example above the ^Meeting\_name^ will be substituted with the text the user entered for the meeting title for the meeting they created. See later in the chapter for a complete list of supported tags.
3. Text that is not enclosed within ^ characters will simply be output as literal text. Using the above example “Minutes from the ” and “ held on” will simply be pushed through to the output document preserving any formatting applied.

Note the tags can be formatted as can any other text within the template file. In the above example the meeting name and date have been formatted as bold. Simply format the tag using the desired formatting attribute and this will be adhered to in Formatted Minute output.

## Repeating and Non-Repeating Tags

There are two types of Tags within Minute Minder, those that repeat and those that do not.

Non-Repeating tags apply to data that contains only one element of data. An example of a Non-Repeating tag is Meeting Name. See example above.

## Minute Minder

---

A Repeating tag is where there are multiple instances of data for a particular tag. Examples of repeating tags are Attendees or Agenda Items. For example adding the following tag to your template will repeat the tag for every Attendee invited to your meeting.

```
^attendee_list "%d. %n" ^
```

Would produce something like:

1. Andy Bowen
2. Bob Holt
3. Diane Fish
4. Gary Jarvis
5. Heidi Lee

In this example the tag `attendee_list` denotes that we wish to output the meeting Attendees. The tag `Attendees_list` accepts a number of parameters which determine the type of output to be generated as part of this tag. In the above example we have used the following parameters:

```
%d – nth Attendee  
%n – Attendee Name
```

The key concept here is the tag `^attendee_list "%d. %n" ^` will repeat for every Attendee invited to the meeting meaning all attendees will be showed in the formatted minutes output.

## Non-Repeating Template Tag Definitions

This section describes all the Non-Repeating tags that can be used within a Minute Minder Template. For each tag we describe its syntax, its meaning and an example of the output. Refer to “Example Template File” to see an example of how these tags can be used.

Tag	Definition & Example
<code>^meeting_name^</code>	<p>The Title of the meeting as specified in the <b>Setup Meeting</b> dialog. Example: <b>Minutes of the ^meeting_name^.</b></p> <p>Produces: <b>Minutes of the Project Progress Meeting.</b></p> <p>Where “Project Progress Meeting” is the title of the meeting.</p>
<code>^meeting_date^</code>	<p>The date the meeting was held in short form (format determined by the locale of the PDA). Example: <b>Meeting date: ^meeting_date^</b></p> <p>Produces <b>Meeting date: 18/7/2005</b></p> <p>Where “18/7/2005” is the date set for the meeting.</p>

## Minute Minder

<p>^meeting_long_date^</p>	<p>The date the meeting was held in long form (format determined by the locale of the PDA).</p> <p>Example:  <b>Meeting date: ^meeting_long_date^</b></p> <p>Produces:  <b>Meeting date: Monday, July 18, 2005</b></p> <p>Where Monday, July 18, 2005 was the date set for the meeting.</p>
<p>^meeting_start^</p>	<p>The time the meeting was due to start (format determined by the locale of the PDA).</p> <p>Example:  <b>Start Time: ^meeting_start^</b></p> <p>Produces:  <b>Start Time: 10:45 AM</b></p> <p>Where “10:45 AM” is the start time for the meeting.</p>
<p>^meeting_length^</p>	<p>The duration of the meeting.</p> <p>Example:  <b>Meeting Duration: ^meeting_length^</b></p> <p>Produces:  <b>Meeting Duration: 30mins</b></p> <p>Where “30mins” is the scheduled duration of the meeting.</p>
<p>^minute_file^</p>	<p>The mobile device file that the minutes were saved into during the meeting. Typically this file is named after the meeting title. It is this file that was used to generate the output file.</p> <p>Example:  <b>Minutes Recorded To: ^minute_file^</b></p> <p>Produces:  <b>Minutes Recorded To: Project Progress Meeting.rsm</b></p> <p>Where “Project Progress Meeting.rsm” was the name of the PDA meeting file.</p>
<p>^output_file^</p>	<p>The name of the RTF file that contains the formatted minutes.</p> <p>Example:  <b>Formatted Minutes File: ^output_file^</b></p> <p>Produces:</p>

## Minute Minder

---

	<p><b>Formatted Minutes File: Formatted Minutes.rtf</b></p> <p>Where Formatted Minutes is the name of the output file.</p>
<code>^output_time^</code>	<p>The date and time the Formatted Minutes were generated. (format determined by the locale of the PDA).</p> <p><b>Example:</b> <b>Formatted Minutes Produced: ^output_time^</b></p> <p><b>Produces:</b> <b>Formatted Minutes Produced: 7/18/2005 3:52 pm</b></p>
<code>^output_long_time^</code>	<p>The date and time the Formatted Minutes were generated (format determined by the locale of the PDA).</p> <p><b>Example:</b> <b>Formatted Minutes Produced: ^output_long_time^</b></p> <p><b>Produces:</b> <b>Formatted Minutes Produced: Monday, July 18, 2005 3:52 pm</b></p>

## Repeating Template Tag Definitions

This section describes all the Repeating tags that can be used within a Minute Minder Template. For each tag we describe its syntax, its meaning and an example of the output. Refer to “Example Template Example File” to see an example of how these tags can be used.

Within the following sections the "<parameters>" section is repeated for each occurrence of the repeating item.

### Attendees

Tag	Definition
<code>^attendee_list</code> <code>"&lt;parameters&gt;"^</code>	List of attendees for the meeting.
<b>Parameters</b>	
<code>%d</code>	Nth item being output.
<code>%n</code>	Name of the Attendee
<code>%r</code>	Shortened “Required” (outputs as <b>Req.</b> ) or “Optional” (outputs as <b>Opt.</b> ) flag for meeting attendance.
<code>%R</code>	Full “Required” (outputs as <b>Required</b> ) or “Optional” (outputs as <b>Optional</b> ) flag for meeting attendance.
<code>%l</code>	If there was a value returned by the previous parameter, move to a new line before outputting the next parameter. This parameter avoids throwing a linefeed unnecessarily if the last parameter contained no value.

Example:

Name	Required
<code>^attendee_list "%d. %n</code>	<code>%R</code>

"^

NOTE: The "^" is carried onto the next line to force each attendee onto a new line.

Produces:

Name	Required
1. Andy Bowen	Required
2. Bob Holt	Required
3. Diane Fish	Optional
4. Gary Jarvis	Required
5. Heidi Lee	Required

# Minute Minder

---

## Agenda List

Tag	Definition
<code>^agenda_list</code> <code>"&lt;parameters&gt;"^</code>	List of agenda items for the meeting.
<b>Parameters</b>	
<code>%d</code>	Nth item being output.
<code>%i</code>	Agenda item name
<code>%n</code>	Name of the Agenda item speaker.
<code>%t</code>	Duration set for the agenda item.
<code>%l</code>	If there was a value returned by the previous parameter, move to a new line before outputting the next parameter. This parameter avoids throwing a linefeed unnecessarily if the last parameter contained no value.

Example:

Item	Sponsor	Time Allowed
<code>^agenda_list "%d. %i</code>	<code>%n</code>	<code>%t</code>

"^

NOTE: The "^ is carried onto the next line to force each Agenda Item onto a new line.

Produces:

Item	Sponsor	Time Allowed
1. Schedule	Gary Jarvis	10
2. Docs	Andy Bowen	10
3. Dev	Bob Holt	10
4. QA	Heidi Lee	10
5. AOB		5

# Minute Minder

## Minute Notes

Tag	Definition
^minutes "<parameters>"^	Output of each Minute Note for the meeting.
<b>Parameters</b>	
%d	Nth item being output.
%b	Body text for Minute Note
%s	Name of the item speaker for the Minute Note.
%a	Short type of Minute Note classification item. A, C, or D meaning Action, comment or Decision.
%A	Long type of Minute Note classification item, Action, Comment, or Decision
%i	Agenda Item the Minute Note is associated with.
%I	Agenda Item the Minute Note is associated with. Only emitted when the agenda item changes from the previous note. Use of this parameter avoids unnecessary repeating of Agenda Items if the output has not changed.
%t	Due date for item in short form (format determined by the locale of the PDA). Only applies to Actions which have Due dates set against them.
%T	Due date for item in long form (format determined by the locale of the PDA). Only applies to Actions which have Due dates set against them.
%x	Timestamp denoting when the note was first written to (format determined by the locale of the PDA).
%l	If there was a value returned by the previous parameter, move to a new line before outputting the next parameter. This parameter avoids throwing a linefeed unnecessarily if the last parameter contained no value.

Example:

Item. Type	Speaker	Note	Due Date
^minutes "%d.%a "^	%s %x	<u>%I</u> %I%b	%t

NOTE: The "^" is carried onto the next line to force each Minute Note onto a new line.

Produces:

Item. Type	Speaker	Note	Due Date
1.C	Gary Jarvis 10:17:00 AM	<u>Schedule</u> Code Complete 2 weeks behind schedule.	
2.C	Heidi Lee 10:19:00 AM	QA complete 3 weeks behind schedule due to illness	
3.C	Andy	<u>Docs</u>	

## Minute Minder

---

	Bowen 10:21:00 AM	Documentation sent to translators	
3.C	Andy Bowen 10:23:00 AM	Documentation now adheres to the new style guide.	



It should be noted that if font attributes such as colour, size, bold, underline etc. are applied to output parameters then these attributes must be applied to both the % and the parameter name as a pair. For example:

These are permitted:

**%b**  
**%b**  
%b

These are NOT permitted:

%b  
%b  
%b



Failure to adhere to the exact tag syntax such as pairing up ^'s or not closing "'s might generate unexpected results.

## Example Template File

The following is an example Template file with typical output it will generate.

### Template file

---

Start

---

# Raspberry Software Limited

Company Confidential

Minutes of the `^meeting_name^`.  
Meeting date (Short): `^meeting_date^ (^meeting_long_date^)`  
Meeting date (Long): `^meeting_long_date^`  
Start Time: `^meeting_start^ for ^meeting_length^`

Those asked to attend the meeting were as follows:

Name	Required
<code>^attendee_list "%d. %n</code>	<code>%R</code>

"^

The agenda set for the meeting was as follows:

Item	Sponsor	Time Allowed
<code>^agenda_list "%d. %i</code>	<code>%n</code>	<code>%t</code>

"^

## Minutes

Item. Type	Speaker	Note	Due Date
<code>^minutes "%d.%a</code>	<code>%s %x</code>	<code>%l%l%b</code>	<code>%t</code>
<code>"^</code>	<code>"^</code>	<code>"^</code>	<code>"^</code>

Minutes Recorded To: `^minute_file^`  
Formatted Minutes File: `^output_file^`  
Formatted Minutes Produced (Short): `^output_time^ (^output_long_time^)`

---

End

---

**Formatted Minutes File**

Start

---

# Raspberry Software Limited

Company Confidential

Minutes of the  
Meeting date (Short):  
Start Time:

**Project Progress Meeting.**  
**18/7/2005 (Monday, July 18, 2005)**  
**10:45 AM for 30mins**

Those asked to attend the meeting were as follows:

Name	Required
1. Andy Bowen	Required
2. Bob Holt	Required
3. Diane Fish	Optional
4. Gary Jarvis	Required
5. Heidi Lee	Required

The agenda set for the meeting was as follows:

Item	Sponsor	Time Allowed
1. Schedule	Gary Jarvis	10
2. Docs	Andy Bowen	10
3. Dev	Bob Holt	10
4. QA	Heidi Lee	10
5. AOB		5

## Minutes

Item. Type	Speaker	Note	Due Date
1.C	Gary Jarvis 10:17:00 AM	<a href="#">Schedule</a> Code Complete 2 weeks behind schedule.	
2.C	Heidi Lee 10:19:00 AM	QA complete 3 weeks behind schedule due to illness	
3.C	Andy Bowen 10:21:00 AM	<a href="#">Docs</a> Documentation sent to translators	

Minutes Recorded To:  
Formatted Minutes File:  
Formatted Minutes Produced (Short):

**Project Progress Meeting.rsm**  
**Formatted Minutes.rtf**  
**7/18/2005 3:52 pm (Monday, July 18, 2005 3:52 pm)**

End

---