

### Create a meeting

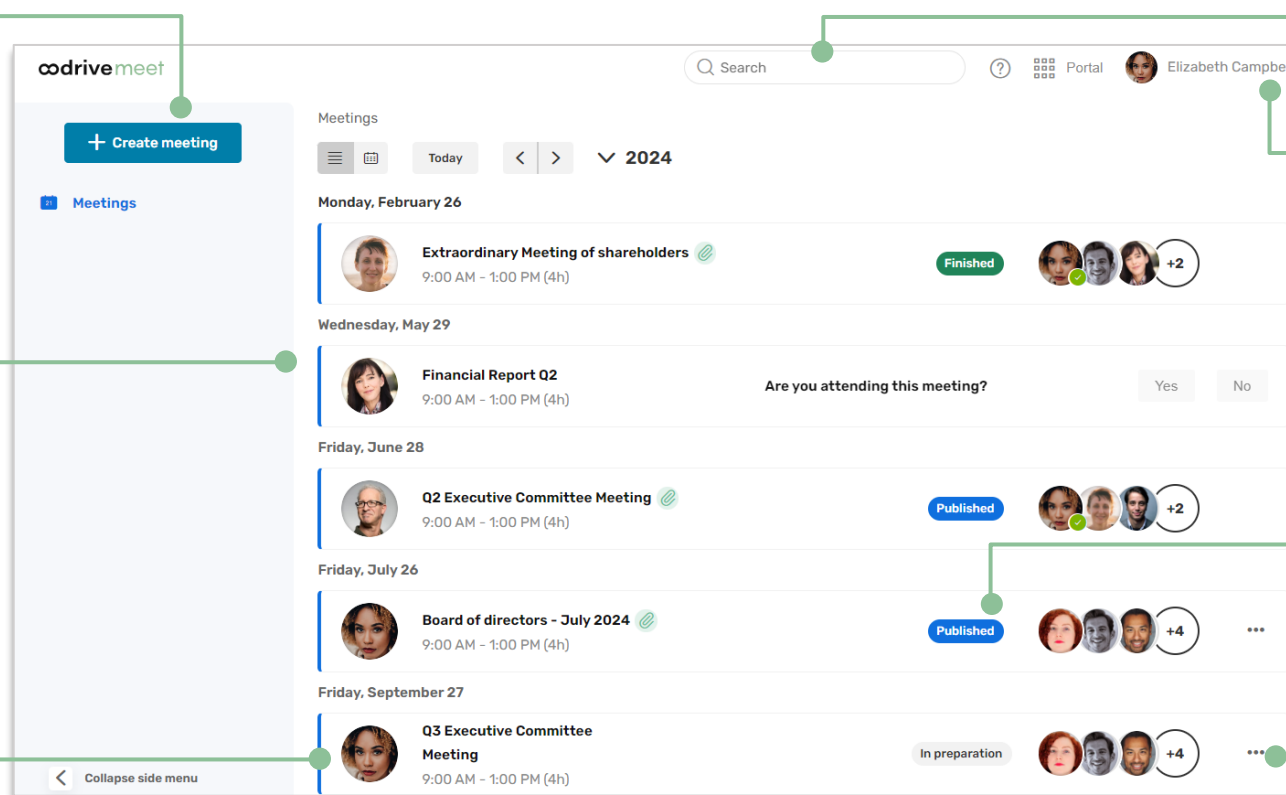
Create a new meeting using the quick create menu.

### Browse your meetings

View all the meetings you are organizing, as well as the meetings to which you have been invited.

### Prepare a meeting

Click on a meeting you are organizing to access its detailed view. You will then be able to edit the meeting's details, manage the list of participants, add documents, or organize a vote.



### Find meetings

Search results include meeting names, descriptions, agenda items and attached documents.

### Access your account

You can view and modify your personal information and preferences, manage your delegations and log out of your session.

### Check meeting status

The meeting status informs your participants about the state of progress of a meeting: In preparation, Published (all meeting elements are available) or Finished (there will be no more changes). Only you can see the meetings still In preparation.

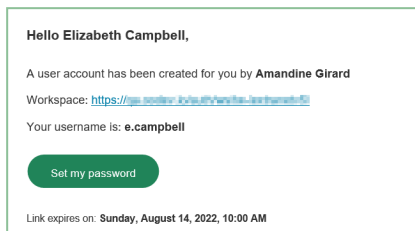
### Access more options

Click the three dots to perform quick actions on the meeting (duplicate or delete)

# 1 Log in to your workspace

## First login

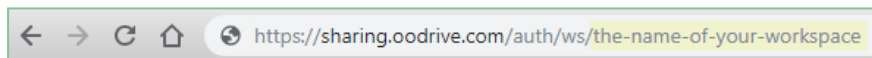
1. Retrieve the username emailed to you when your account was created.
2. Click **Set my password**.



3. You will be redirected to a browser page asking you to set a password and confirm before clicking **Validate**.
4. Click **Log in** to access the login page.
5. Enter your username and password, then click **Log in**.
6. From the Portal, click on the **Oodrive Meet** or **Meeting** service.

## After the first login

1. Retrieve the username emailed to you when your account was created.
2. In your web browser, go to the login page for your workspace:



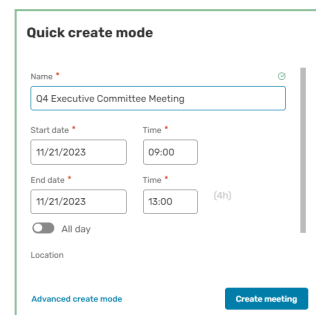
3. Enter your username and password, then click **Log in**.

If you have forgotten your password, click **Forgot your password?**

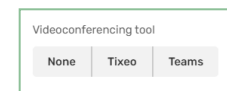
4. From the Portal, click on the **Oodrive Meet** or **Meeting** service.

# 2 Plan a new meeting

1. In the navigation panel, click **Create**, then **Create meeting** to access the new meeting menu.
2. Fill in the main fields: name, date, start and end time, and location of the meeting.

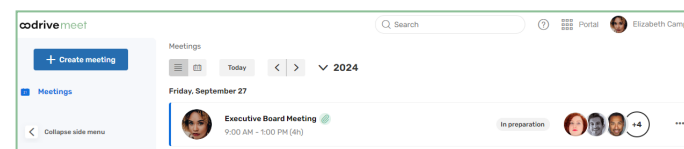


3. Click **Advanced create mode** to add a description or a video conferencing link.



4. Click **Create meeting** to save your planned meeting.

The meeting status is set to "in preparation" and will remain invisible to participants until you publish it

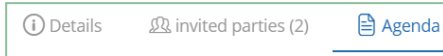


You can make changes to the meeting details at any time. To do so, go to the **Meetings** section and click on the meeting you want to modify.

**Tip:** You can duplicate an existing meeting from its detailed view, via the **Manage** button or the recurrence menu. New meetings created this way will keep the title, participants and agenda of the original meeting.

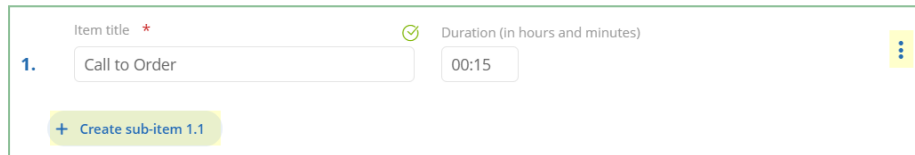
### 3 Define the agenda

1. In the **Meetings** section, select the meeting for which you want to define the agenda.
2. From the meeting's detailed view, click the **Agenda** tab.

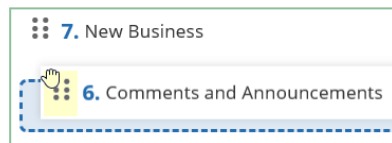


3. Click **Create item**, then fill in the item's title and, if you want to, its duration.
4. To add to an item, click on the three dots to the right of its name and select an element to add: **Description**, **Files** or **Vote**.
5. Add as many items as necessary by clicking **Create item** again.

You can also add sub-items by clicking **Create sub-item** under the parent item of your choice.



6. Once created, you can reorganize your items into the order of your choice. To do this, click on the six dots to the left of an item to move via drag-and-drop.



7. When you have finished, click **Save** to save the agenda.

Return to the **Agenda** tab at any time to make changes to the agenda.

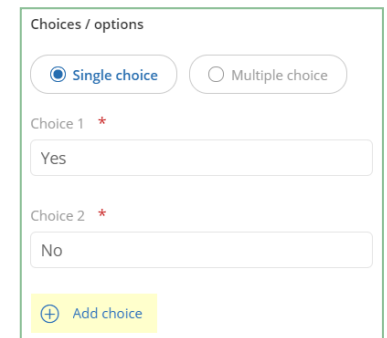
### 4 Create a vote

1. In the **Meetings** section, select the meeting for which you want to organize a vote.
2. In the **Votes** section, click **Add vote**.

**Tip:** To attach a vote to a specific item in the **Agenda** tab, click on the three dots to the right of the item and select **Vote**.

3. Enter the question that will be voted on by the meeting participants.
4. Select a voting method: **Anonymous** or **Show of hands**.

5. In the **Choices / options** section, select **Single choice** or **Multiple choice**, depending on whether you want to allow participants to select several responses.

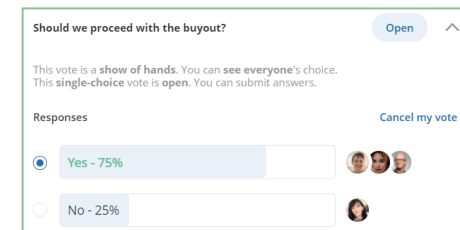


6. Specify the possible answers. You can add as many responses as necessary by clicking **Add choice**.
7. When you have finished, click **Save**.

#### Open the voting session once the meeting is published

- In the meeting's detailed view, select your question and click **Open voting**, then **Save**.

**Tip:** Click on a question to view its progression in real-time.



- Close the voting session by clicking your question, then **Close voting**.

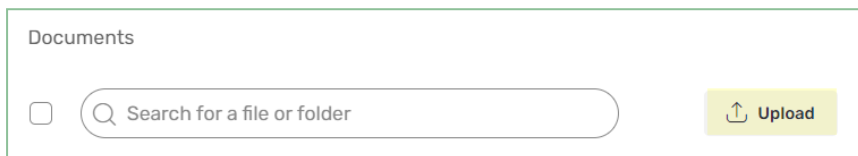
## 5 Add meeting documents

### Step 1: Attach documents to a meeting

1. In the **Meetings** section, select the meeting to which you want to attach files.
2. In the **Related documents** section near the bottom of the page, click **Add files**.

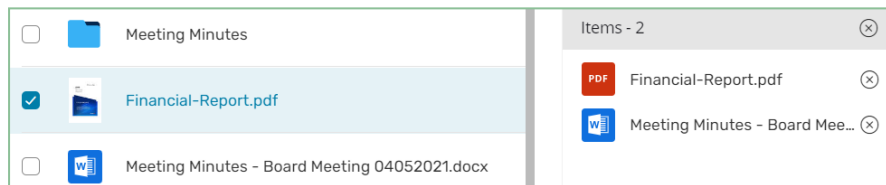
**Tip:** To attach documents to a specific item in the **Agenda** tab, click on the three dots to the right of the subject and select **Files**.

3. Click **Upload** in the upper-right corner of the window.



**Tip:** If Oodrive Work is available on your workspace, you can also browse your workspace files and select the documents you want to attach to the meeting.

4. Browse the file explorer on your computer and select one or more files by holding down the **Ctrl** key.
5. Click **Open**.

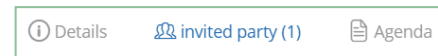


The files are uploaded to your workspace and will be available next time you want to attach documents to a meeting.

6. Click **Add to meeting**.

### Step 2 : Define participant permissions

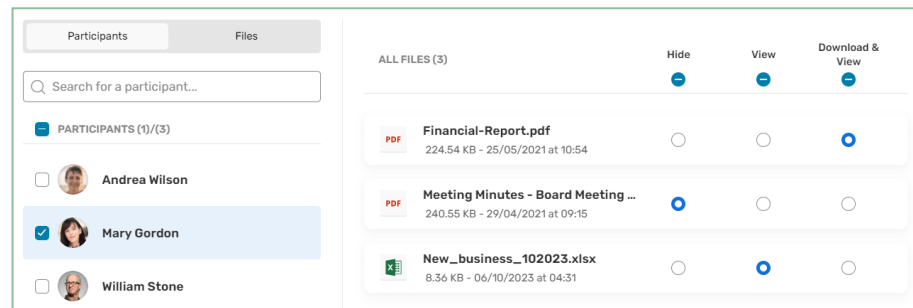
1. In the meeting's detailed view, click the **Invited party** tab.



2. In the **Invite participants** section, click **Manage permissions**.

You will now be able to define the access level of each participant for all meeting documents.

3. By default, all participants are selected. Adjust the selection as needed in order to set permissions for a specific group or a single participant
4. Select the access level you want to grant the participant(s) for each document.



5. When you have finished, click **Finish**, then **Save**.

## 6 Add participants

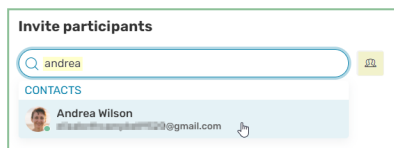
1. In the **Meetings** section, select the meeting for which you want to define the participants.
2. In the meeting's detailed view, click the **Invited party** tab.



3. If you plan to attend the meeting you are organizing, click **yes** in the banner along the top of the window.



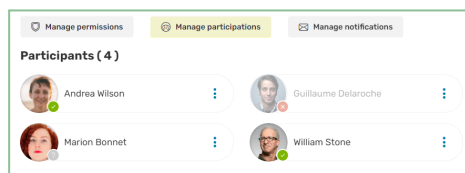
4. In the **Invite participants** section, enter the name of a participant or a group to add them to the meeting.



**Tip:** Click  to select participants directly from your address book.

5. If you need to remove a participant, click on the three dots to the right of the participant's name, and select **Delete**.

Return to the **Invited parties** tab at any moment to modify the list of participants or view their attendance status.

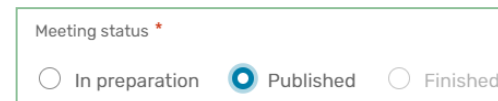


You also have the possibility to define the attendance status of guests by clicking **Manage participations**.

## 7 Notify participants

### Publish the meeting

1. In the **Meetings** section, select the meeting you want to publish.
2. In the **General information** section, select the **Published** status.

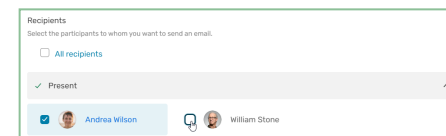


3. Click **Save** to save the new status. This action cannot be reversed.

### Send invitations to participants

The application never sends automatic notifications. You can choose to send an email notification to the invited parties whenever convenient.

1. In the **Meetings** section, select the meeting for which you want to send notifications.
2. In the **Invited parties** tab of the meeting's detailed view, click **Manage notifications**.
3. In the **Recipients** section, select the participants to which you want to send an email.



4. In the **Templates** section, select an email template and, if needed, make any necessary changes to the subject and body of the email.

**Tip:** Click **Email preview** in the bottom-left corner of the window to preview the email that will be sent to the invited parties.

5. When you have finished, click **Notify**.


## 8 Have the attendance sheet signed.

As the meeting organizer, the signed attendance sheet allows you to account for those in attendance and to certify that the quorum is present.

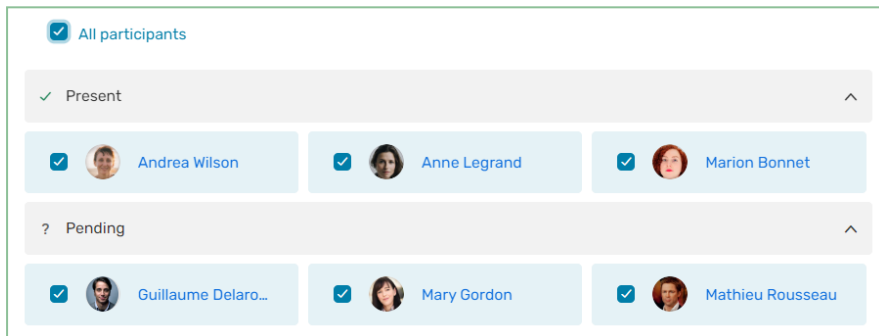
The attendance sheet becomes available to be sent for signature as soon as your meeting starts.

### Send the attendance sheet for signature

1. In your meetings list, select the meeting you are conducting.
2. From the meeting detailed view, tap the **Agenda** tab.
3. When the meeting starts, click **Send Attendance Sheet**.

A blue button with a white document icon and the text "Send attendance sheet".

4. Select the participants who will be required to electronically sign the attendance sheet, then click **Next**.

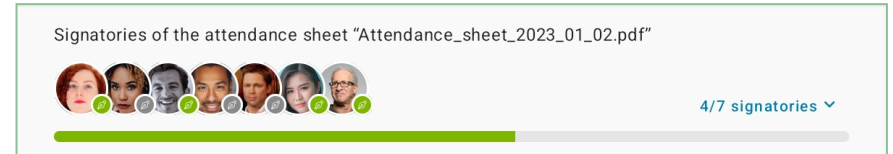


**Note:** By default, participants who have confirmed their presence and those who have not yet responded are pre-selected.

5. Modify the document title if needed, then go to the location where you want to save the attendance sheet.
6. When you have finished, click **Send** to send the attendance sheet for signature.

Participants will then receive an email allowing them to sign the attendance sheet.

**Tip:** You can track the progression of signing in real time from the **Agenda** tab:



By default, the attendance sheet closes automatically when all participants have signed it.

However, if necessary, you can also close the attendance sheet manually (on condition that at least one participant has signed it) by clicking **Close the attendance sheet**.

### Download the signed attendance sheet

Once closed, the attendance sheet can be viewed and downloaded from the **Agenda** tab of your meeting.

Participants will also receive an email allowing them to download a copy of the signed attendance sheet.

1. In your meetings list, select the finished meeting.
2. Go to the **Agenda** tab.
3. Click the three dots next to the attendance sheet and select **View** or **Download**.

