oodrive meet

User Guide

Organizing a meeting

oodrivemeet

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1. Getting started with Oodrive Meet

Oodrive Meet is a tool for digitalizing governance meetings that allows you to plan and conduct your sensitive meetings online in a secure and sovereign environment.

As the meeting organizer, you have full control over the entire meeting planning and conducting process. The following table lists actions you can take to organize and conduct a digital meeting in Oodrive Meet.

| Before the meeting	During the meeting	After the meeting
• Create a meeting (date, location, description, video conferencing link) • Define the agenda • Plan voting session • Select participants and send invitations • Add sensitive files and manage permissions • Manage sending notifications to the invited parties	• Participate to the meeting in video conferencing mode • Have the attendance sheet electronically signed to ensure quorum • View and annotate meeting documents • Take personal notes under each agenda item • Voting anonymously or by show of hands	• View documents, votes and personal notes once the meeting is over • Publish meeting minutes

1.1. Log in to your workspace

Depending on the authentication method your organization has chosen, you can log in:

- using your Oodrive login credentials
- using your company login credentials

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Log in with your Oodrive login credentials

1. Retrieve the username emailed to you when your account was created and click **Set my password**.
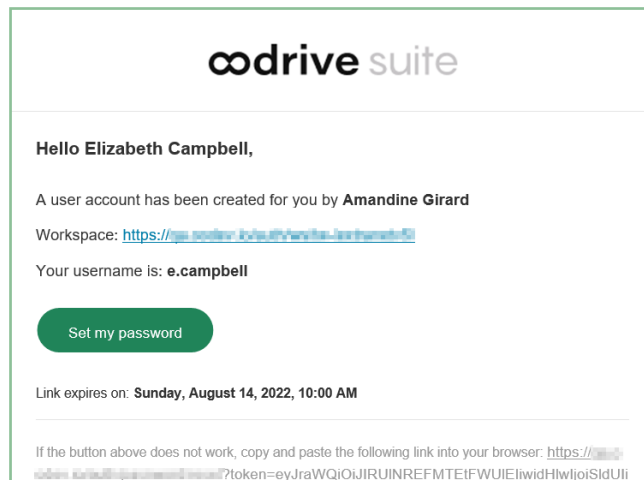
2. You will be redirected to a browser page asking you to set a password and confirm it before clicking **Validate**.

3. Click **Log in** to access the login page.

   Please note: If the Oodrive login field is not displayed, click **Log in using your login credentials** to access it.

4. Enter your username and click **Next**.

5. Enter the password you have just specified, then click **Log in**.
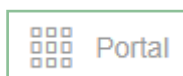
   Careful: After 5 failed login attempts, a security code will automatically be sent via email. This code will be required in addition to your password.

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

   If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

6. Next, you will access the Oodrive Suite portal, where you will find all the applications and configuration modules to which you have access.
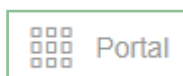
To return to the portal at any time, click on in the upper-right corner of the page, then select **Portal**.

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Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity (or after 4 hours if the Oodrive Work discussion feature is enabled). You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

Log in with your company login credentials

1. Click the **Log in using SSO** button.
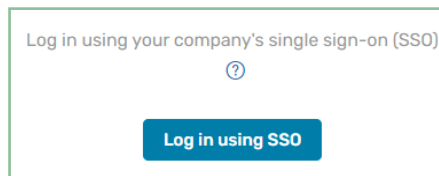
If the button is not available, click **Log in using your company's single sign-on (SSO)**

2. Enter your company login credentials and click **Log in**.

If you have forgotten the password associated with your company username, please contact your company's IT administrator.

If two-factor authentication has already been configured on your workspace, you will also be asked to enter the code received on your mobile device.

3. Next, you will access the Oodrive Suite portal where you will find all the applications and configuration modules to which you have access.


To return to the portal at any time, click on [Portal icon] in the upper-right corner of the page, then select **Portal**.

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Please note: As a security measure, you will be automatically logged out of your session after 30 minutes of inactivity (or after 4 hours if the Oodrive Work discussion feature is enabled). You can extend your session by clicking **Continue to browse** when the logout warning appears on the screen.

Log out at any time by clicking on your name in the upper-right corner of the page, then on **Logout**.

1.2. View your meetings

The **Meetings** section includes all the meetings you organize and are invited to.

You can change the display of your meeting according to your preferences. You can switch between the **List** and **Calendar** display at any moment.

To modify your meeting display mode:

1. Access your meeting application Oodrive Meet.

2. In the **Meetings** section, click the ▤ icon to select the **List** display or the ▦ icon to select the **Calendar** display.

   Below is an example of the **List** display:
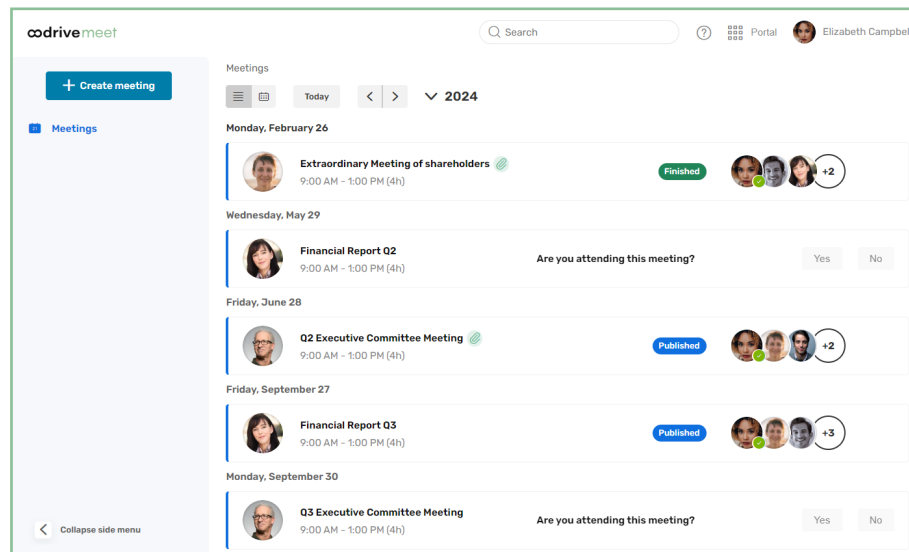
   You can now browse all of your meetings according to your display preferences.

Tip: To distinguish between meetings in which you are the organizer and meetings in which you are just a participant, you can view the organizer's profile picture that appears on the left side of each meeting tile.

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1.3. Search for a meeting or document

Quickly find a meeting or document through keyword search. Research is done on all meeting content in your calendar, including:

- the title and description of the meeting
- the title and content of the agenda items
- the title and content of documents attached to meetings

Please note: Search on document content is not available in SecNumCloud-qualified Private Cloud environments.

1. Click the search bar in the upper-right corner of the application.

2. Enter words or key phrases appearing in your meeting invitations, then press the **Enter** key.
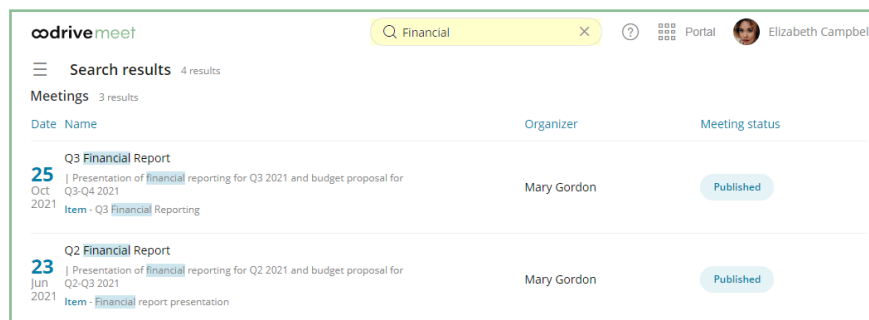
3. Access the meeting or document matching your search by clicking on it.

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2. Plan a new meeting

As the meeting organizer, you are responsible for preparing the necessary elements for the smooth running of the meeting.

To schedule a new meeting in Oodrive Meet, you will have to:

- Create the meeting (name of the meeting, date, time, location, description...)
- Generate a video conferencing link if the meeting is remote
- Define the agenda
- Plan possible voting sessions
- Select participants
- Upload meeting documents

2.1. Create a meeting

There are two ways you can create a new meeting: by using the **Create meeting** button or by duplicating an existing meeting. Once created, you can also choose to make your meeting recurring.

Create 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.

Create a meeting based on an existing meeting

Duplicating a meeting allows you to retrieve information from a meeting to create a new one on the same template. Meeting duplication is especially useful for managing the recurrence of the meetings you organize.

Please note: The new meeting will only keep the general information (title, location and description), participants and the original meeting agenda. You won't be able to keep the following items:

- related documents and agenda files
- the Microsoft Teams video conferencing link
- votes

1. In the **Meetings** section, select the meeting you want to duplicate.

2. In the meeting's detailed view, click on the **Manage** button in the upper-right corner of the window and select **Duplicate**.
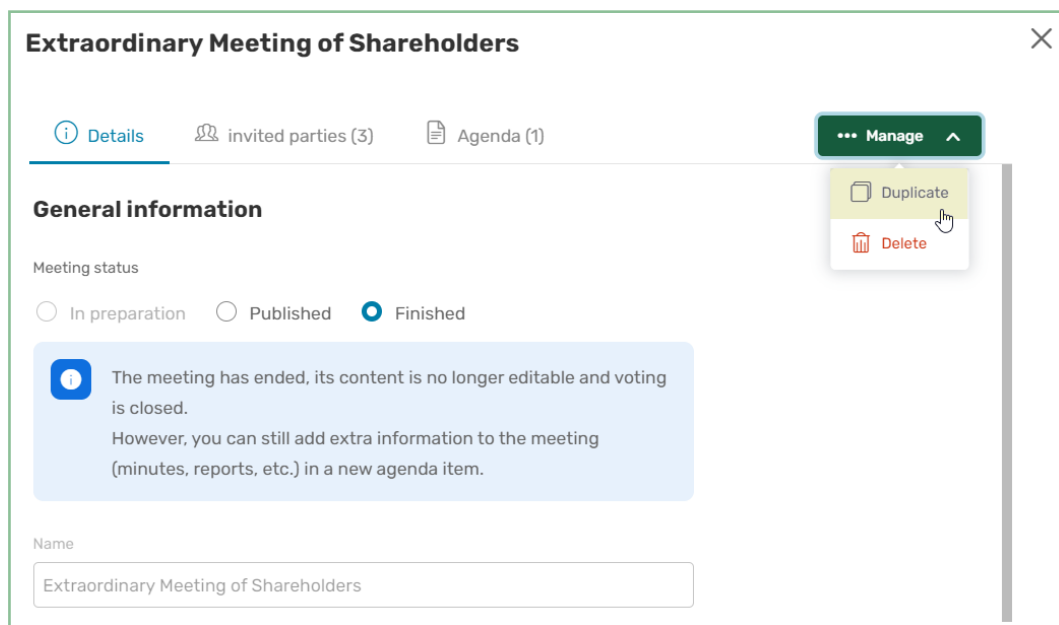
Please note: You also can do this action from the **Meetings** section by clicking on the three dots to the right of the meeting then selecting **Duplicate**.

3. The first time you duplicate a meeting, a message is displayed on the screen telling you which items will not be kept during the duplication.

   If you no longer want to see this message, check **I understand, don't show this message again** and then click **Duplicate**.

4. The duplicated meeting is displayed on the screen. Make the necessary changes to prepare your new meeting.

5. Once you have finished, click **Create duplicated meeting**.

Create a recurring meeting

You can make a meeting you've organized into a recurring one. To do so, you must start by preparing the first meeting of the series before setting up a recurrence.

Depending on your preferences, your meeting can be held weekly or monthly. When you enable the recurrence, your meeting is automatically duplicated into 5 copies **In preparation**, one week or one month apart from each other.

These subsequent instances of your meeting will only keep the general information (title, location and description), participants, and agenda of the original meeting. The following items are not kept:

- Related documents, agenda files and meeting minutes
- The Microsoft Teams video conferencing link
- Votes

Please note that each instance is considered to be a meeting of its own, independent from the other instances in the recurrence. This means that you can modify or delete any one of the instances without affecting the others.

![oodrive meet logo]

1. In the **Meetings** section, select the meeting that needs to be repeated periodically.

2. In the meeting's detailed view, click on the **Does not repeat** drop-down menu and select the frequency of the recurrence:

   - Every week
   - Every month

   The displayed options are adapted to the day selected for your original meeting.
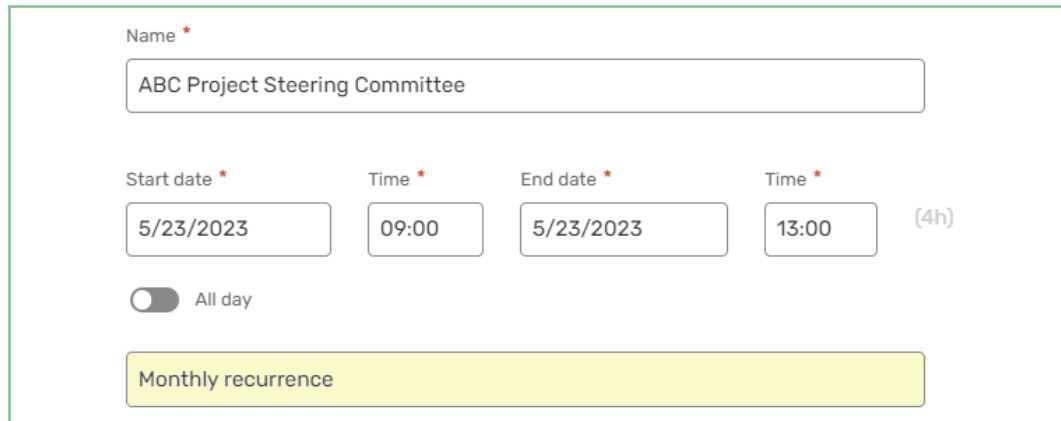
Important: Once your recurrence is created, you will not be able to modify or delete it.

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3. When you have finished, click **Save**.

   The meeting is duplicated into 5 copies. In the detailed view of each copy, you will find the label **Weekly recurrence** or **Monthly recurrence** depending on the frequency you have chosen.

When your agenda is set to **List view**, the ⟳ icon allows you to identify an instance of a recurring meeting.

2.2. Add a Microsoft Teams link

If your administrator has enabled this feature, you can add a Microsoft Teams video conferencing link to your meeting so that invited parties may participate remotely.

To add a Microsoft Teams video conferencing link to a meeting:

1. In the new meeting creation menu, or in the **Details** tab of an existing meeting, enable the **Teams** option.

2. Log in to your Microsoft account.

3. If this is your first time using the Teams feature, you must allow Oodrive Meet to access your Microsoft account.

   To do so, view the requested permissions, then click **Accept**.

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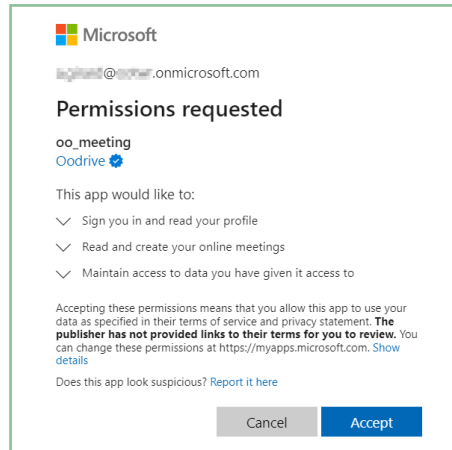
The meeting link is generated.

4. Finish creating or modifying your meeting, then save it.

You can disable your video conferencing link at any moment by selecting **None**.

2.3. Add a Tixeo link

If your administrator has enabled this feature, you can add a Tixeo video conferencing link to your meeting so that invited parties may participate remotely.

To add a Tixeo video conferencing link to a meeting:

If you do not already have the Tixeo desktop application, you will need to install it to launch the meeting.

1. In the new meeting creation menu, or in the **Details** tab of an existing meeting, enable the **Tixeo** option.

The **Join Tixeo meeting** button is displayed in gray.

2. Finish creating or modifying your meeting, then save it.

The meeting link is generated.

The next time you open this meeting, the Tixeo button will be active and in orange.

Please note: You cannot add a Tixeo link to a meeting that has already started.
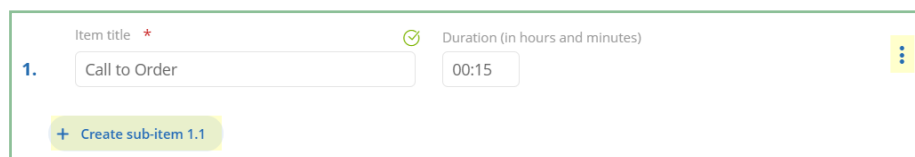
You can disable your video conferencing link at any moment by selecting **None**.

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2.4. Define the agenda

You can associate a duration, a description, a file or a vote to each agenda item to make it easier to keep track of your meeting.

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.

   If you want to remove an item or sub-item from the agenda, click the three dots to its right and select **Delete**.

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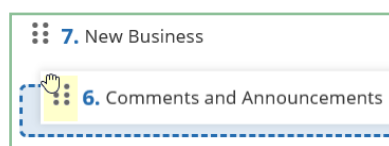
7. When you have finished, click **Save** to save the agenda.

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

2.5. Create a vote

You can create a vote to get feedback from meeting participants on an agenda item or to gather any other information. It is also possible to associate a vote with each item on the agenda.

If you are also a participant in the meeting you are organizing, you will also have the opportunity to vote.

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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**.

As long as you do not open the voting session, you can return at any time to the meeting details to delete a vote or make changes.

Open the voting session once the meeting is published

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

   Tip: When the voting session is open, you can click on a question at any time to view its progression in real-time.
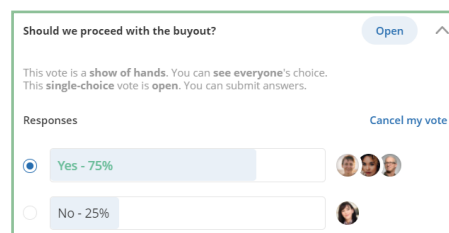
2. Close the voting session by clicking your question, then **Close voting**.

2.6. Add participants

From the quick or advanced meeting creation form, you can add contacts, users and groups as participants using your workspace address book.

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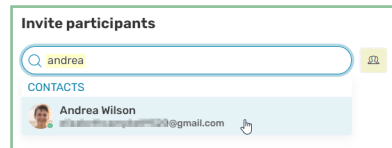
Tip: Click to select participants directly from your address book.

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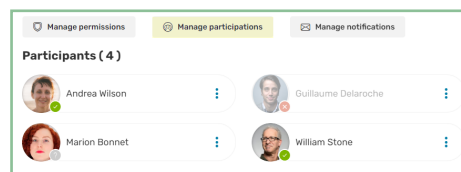
You also have the possibility to define the attendance status of guests by clicking **Manage participations**.

2.7. Add meeting documents

You can make meeting documents available to your invited parties. Documents can be added as related documents or attached to a specific agenda item.

With the granular management of permissions provided by Oodrive Meet, you can define exactly which documents each invited party has access to and the scope of their actions on each document.

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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 **Import** 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**.

   If you want to remove a document from the related documents or the agenda, click on the three dots to its right and select **Remove**.

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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.

   Tip: To define the permissions associated with a specific document in the **Details** or **Agenda** tab, click on the three dots to the right of that document and select **Manage permissions**.

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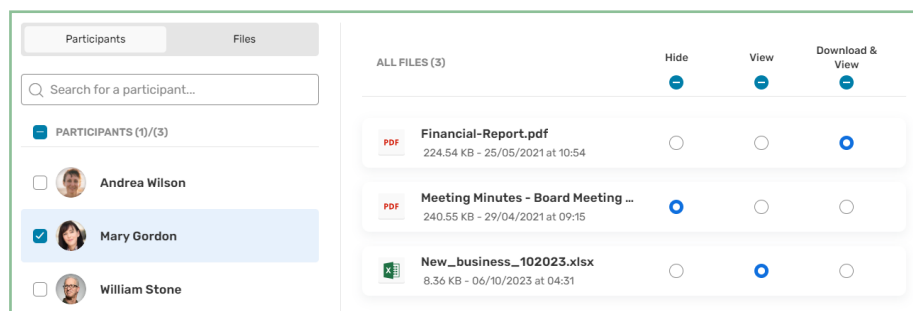
5. When you have finished, click **Finish**, then **Save**.

2.8. Generate a Boardbook

You can generate a Boardbook from the detailed view of your meeting. This feature allows you to merge multiple PDF files into a single document, preserving their original order and providing a clear, hierarchical structure.

The Boardbook includes:

- the meeting agenda,
- a summary of the documents related to the agenda, with the PDF files sorted in the planned order,
- a summary of the attached files, added at the end and also sorted in order of appearance,

Files related to the agenda are merged first, followed by any attached files.

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Create a Boardbook

Requirements: To generate a Boardbook, the following conditions must be met:

- Only PDF files can be grouped together.

- Each file must be less than 50 MB in size.

- The files must be available to all participants.

1. In the **Meetings** section, select the meeting for which you want to generate a Boardbook..

2. Under **Boardbook**, click **Generate the Boardbook**.

3. In the window that appears, browse your folders and go to the location where you want to save your Boardbook.

4. When you have finished, click **Generate the Boardbook**.

   The Boardbook will then appear in the dedicated section, automatically using the name of the meeting as its title. An orange dot indicates that the Boardbook is currently being generated.

5. Once the Boardbook has been generated, the orange dot disappears and it is attached to your meeting. It will be available to meeting participants as soon as the meeting is published.

Below is an example of a Boardbook:

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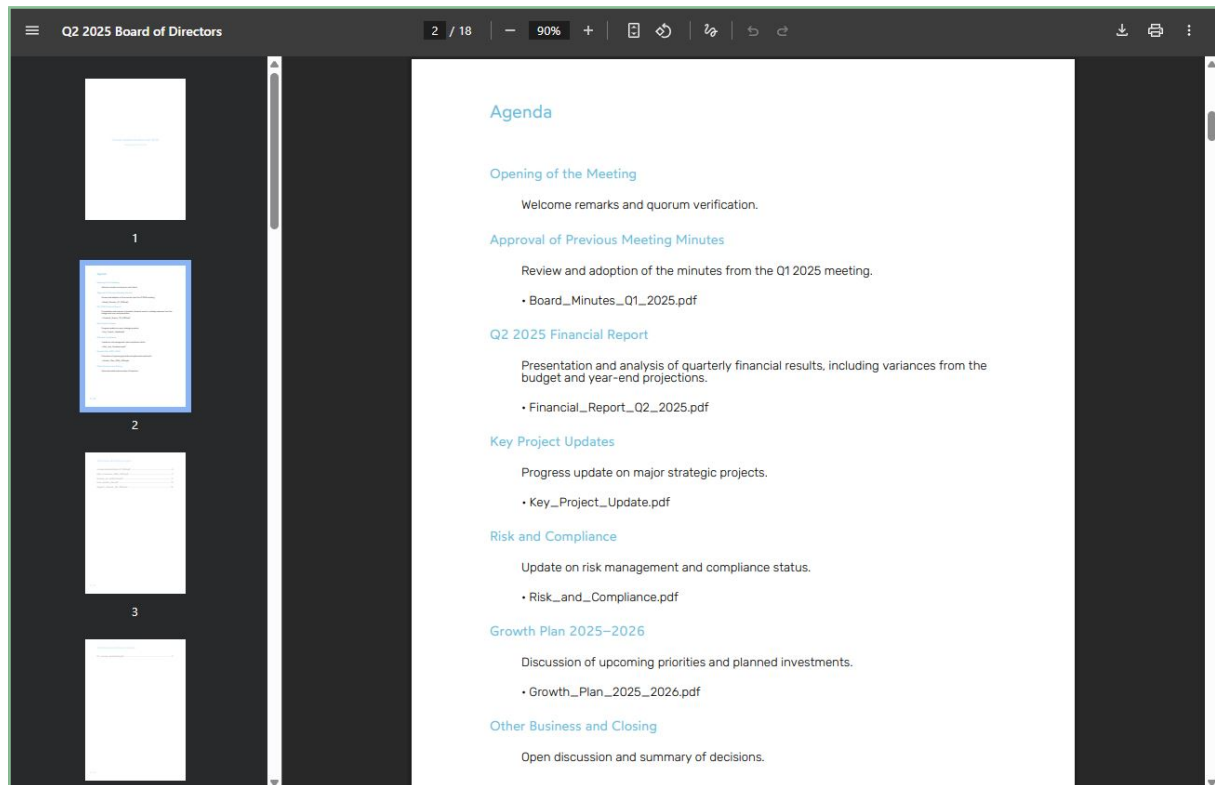
Download the generated Boardbook

Once generated, the Boardbook is available from the detailed view of your meeting: you can view or download it, while participants can only view it.

1. From your meeting list, select the meeting containing the Boardbook you need.

2. Under **Boardbook**, click the three dots next to the Boardbook, and select **View** or **Download**.
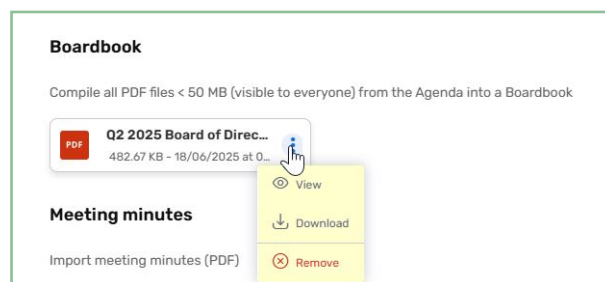
Remove the generated Boardbook

You can remove the Boardbook generated from your meeting, particularly if you want to replace it with an updated version, fix an error, or temporarily restrict access to it. This action allows you

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![oodrive meet logo]

to maintain control over the documents shared with participants and ensure that the information distributed is relevant.

1. From your meeting list, select the meeting containing the Boardbook you want to remove.

2. Under **Boardbook**, click the three dots next to the Boardbook, and select **Remove** .

3. Confirm removal of the Boardbook by clicking **Remove**.

The Boardbook is removed from the meeting but remains available in your files.

Please note: If the generated Boardbook no longer appears in your files or in your meeting without you deliberately deleting it, you can regenerate it at any time by clicking on **Regenerate the Boardbook**.

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3. Notify participants

3.1. Display participant view preview

You can view a meeting as a participant before publishing it and making it available to your invited parties.

Please note: The participant view preview is available regardless of the meeting status.

1. In the **Meetings** section, select the meeting you are organizing

2. In the meeting's detailed view, click on **Participant view preview: Disabled** along the bottom of your screen to switch to the participant view

   The meeting is displayed as it appears to the participants. Click on the **Details**, **Invited parties** and **Agenda** tabs to view each one.
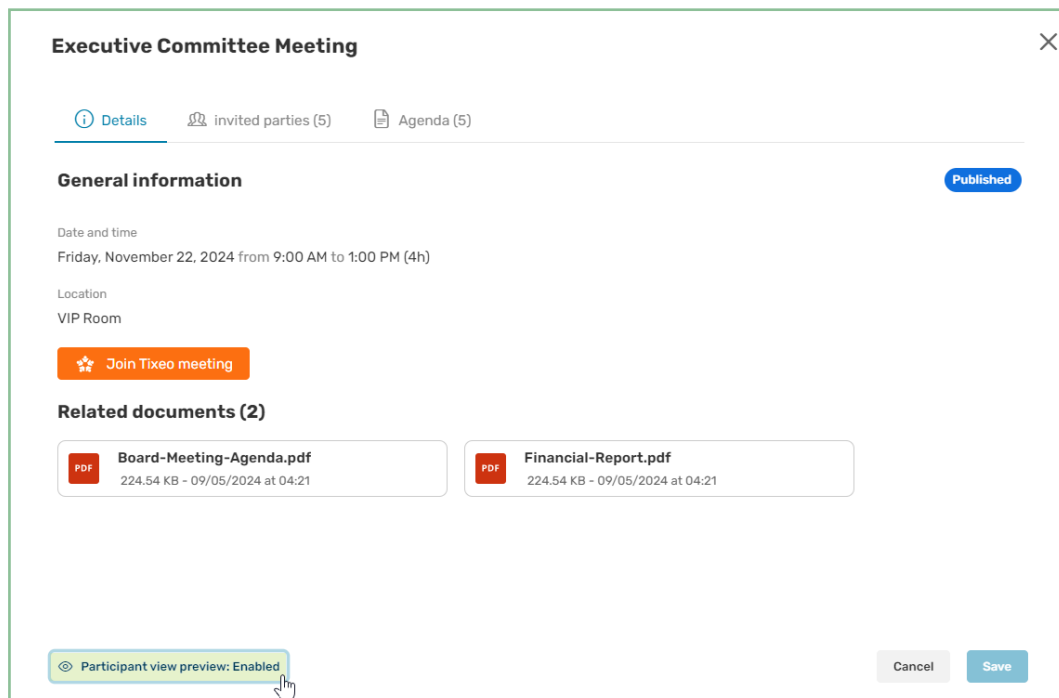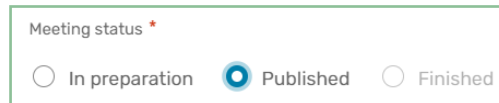
3. Once you have finished, click on **Participant view preview: Enabled** along the bottom of your screen to switch back to the organizer view.

3.2. Publish the meeting

When you have finished preparing your meeting, you must publish it in order to make it available to your invited parties. Once published, it will immediately appear in your invited parties' calendars enabling them to access its content (agenda, documents, votes...).

Please note: you cannot go back to the **In preparation** status after publishing the meeting.

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1. In the **Meetings** section, select the meeting you want to publish.

2. In the **General information** section, select the **Published** status.

Meeting status *

○ In preparation ⦿ Published ○ Finished

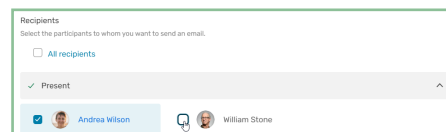3. Click **Save** to save the new status. This action cannot be reversed.

3.3. 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.

    If your meeting is not published, you will only be able to send a notification in the **Save the date** format.

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.

Recipients
Select the participants to whom you want to send an email.
☐ All recipients

✓ Present   ⌃

☑ 👤 Andrea Wilson   👤 William Stone

4. If applicable, select the individual who must be informed of the meeting in the **Informed individuals** section.

    They will receive an Outlook invitation to add the event to their calendar, but they will not have access to the meeting.

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5. In the **Templates** section, select an email template (**Save the date**, **Convocation**, **Update** or **Cancellation**) and, if needed, make any necessary changes to the subject and body of the email.

   Please note: You can notify your participants of the changes made to the meeting by checking **Add update for this event to recipient's calendar**.

   If your meeting is **In preparation**, you can add the agenda to the notification email by checking **Add agenda**.

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

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

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4. Manage your meetings

As the meeting organizer, you can manage your meetings and change details as needed. You can also fill in the presence or absence of meeting participants and even delete meetings if necessary.

4.1. Edit a meeting

You can change your meeting details at any moment as long as that its status is **In preparation** or **Published**.

If it is **Finished**, you can add minutes but not change the meeting's information.

1. In the **Meetings** section, select the meeting you want to edit.

2. Go to the detailed view **Details** tab to edit items related to the meeting planning. You can :

   - Edit the start and end date and time of the meeting.
   - Edit the name, location and description of the meeting.
   - Enable or disable the Microsoft Teams video conférencing link.
   - Add or delete a vote or a related document.

3. Go to the detailed view **Invited parties** tab to edit items related to participants. You can :

   - Add or delete an invited party
   - Modify the access permissions to the documents assigned to each invited party
   - Change the participation status of an invited party

4. Go to the detailed view **Agenda** tab to edit items related to the agenda items. You can:

   - Add or delete an item
   - Change the order of items
   - Edit the description and duration of an item
   - Add or delete a file related to an item
   - Add or delete a vote related to an item

5. Depending on whether you want to notify the invited parties of your changes, make sure to check or uncheck the **Notify invited parties** option.

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6. Click **Save**.

    Please note: If you have generated a Tixeo link, be sure to make all changes in the Oodrive Meet application. Changes made in the Tixeo application will not be taken into account.

7. If you have enabled notifications, select the invited parties you want to notify and deselect the others.

    If desired, you can edit the content of the notification email.

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4.2. Register guest attendance

If your administrator has enabled this feature, as the meeting organizer, you will be able to register the attendance or absence of participants before or during the meeting.

1. in the **Meetings** section, select the meeting for which you want to register attendance.

2. In the detailed view of the **Invited parties** tab, click the **Manage participations** button.

3. In the **Participations** section, select the guest for whom you wish to register attendance.

4. Under the question asking whether the invited party will attend the meeting, click **Yes** or **No**.

   You can specify in the **Additional Informations** field how you obtained the guest's attendance information.

5. Repeat steps 3 and 4 to indicate the presence of other invited parties at the meeting.

6. When you have finished, click **Save**.

You can return to this menu at any time to make changes to the attendance status of guests according to the latest information you have.

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4.3. Delete a meeting

You can delete a meeting created by error or one that is obsolete. it will disappear from your calendar and (if it had already been published) from the invited parties' calendar.

Please note: Any meeting deletion is final and irreversible.

1. In the **Meetings** section, select the meeting you want to delete.

2. In the meeting's detailed view, click on the **Manage** button in the upper-right corner of the window and select **Delete**.

3. Depending on whether you want to notify the invited parties of the meeting's deletion, make sure to check or uncheck the **Notify invited parties** option.

4. Click **Delete**.

5. If you have enabled notifications, select the invited parties you want to notify and deselect the others.

   If desired, you can edit the content of the notification email.

Please note: You also do this action from the **Meetings** section by clicking on the three dots to the right of the meeting then selecting **Delete**.

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5. Conduct a meeting

You can do the following to conduct your meeting

- Launch the video conferencing for remote invited parties
- Have the attendance sheet signed to confirm attendance and absences during the session
- Take personal notes on each item and sub-item of the agenda
- Open and close votes to gather feedback from participants on multiple topics
- Close a finished meeting for archiving

5.1. Launch your Teams meeting

If you chose to add a Microsoft Teams video conferencing link when planning your meeting, launch the video conferencing and allow participants waiting in the lobby to join the meeting.

1. In the **Meetings** section, select the meeting you are conducting.

2. In the meeting's detailed view, click **Join Teams meeting** and log in to your Microsoft account.

   | Videoconferencing tool | |
   | None | Teams |

   [🎤 Join Teams meeting]

3. Once you are logged in, you'll be redirected to the meeting in your Microsoft Teams application.

   if prompted, authorize Microsoft Teams to access your microphone and camera.

4. Click **Join now** to join the virtual meeting.

   As a security measure, participants will wait in the lobby until you admit them into the meeting.

5. In the window that appears, click **View lobby** to view the list of participants that are waiting in the lobby.

6. Admit each participant into the meeting by by clicking on the checkmark ✅ next to their name.

   Tip: You can also click **Admit all** to admit everyone currently in the lobby.

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5.2. Conduct a Tixeo Meeting

Log in to the Tixeo desktop application

Depending on the authentication method your organization has chosen, you can log in:

- using your Tixeo login credentials
- using your oodrive login credentials

Requirements: You need the Tixeo desktop application installed on your computer in order to log in and launch the meeting.

Log in with your Tixeo login credentials

If your company uses a private server, you'll need to enter the address of your private server first. If you do not have this information, please contact your IT department.

1. Select the server type (private or public) used by your company and enter the server address.

2. Enter your Tixeo username and click **Sign in**.

3. Enter the password, then click **Sign in**

4. Upon accessing your Tixeo dashboard, you will be able to find all of your upcoming meetings.

Log in with your oodrive login credentials

1. If prompted, select the private server type and enter the address of the server used by your organization, then click **Connection**.

2. Click **Via oodrive**.

3. Enter your oodrive username and click **Next**.

4. Enter the password, then click **Log in**.

5. Upon accessing your Tixeo dashboard, you will be able to find all of your upcoming meetings.

Launch your Tixeo Meeting

If you chose to add a Tixeo video conferencing link when planning your meeting, launch the video conference and allow participants waiting in the lobby to join the meeting. Participants can also join the video conference by clicking on the Tixeo link in the participant view of your Oodrive Meet meeting.

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1. In the **Meetings** section, select the meeting you are conducting.

2. In the meeting detailed view, click **Join Tixeo meeting**.

3. You will be redirected to a browser page asking you to choose between opening the desktop application or downloading it:

   - If you already have the desktop application, click **Open Tixeo** Then **Open Tixeo Communication Client**.

   - If you don't yet have the desktop application, click **Download** then select the version corresponding to your operating system.

4. After opening the Tixeo application, log in to your account.

5. Once logged in, select the meeting you're conducting and click **Join the meeting**.

6. As a security measure, participants will wait in the lobby until you admit them into the meeting.

   Participants who logged in to Tixeo via Oodrive SSO will join the meeting directly, without having to go through the lobby.

7. From the **Pending** section of the **Attendees** tab, authorize each participant to join the meeting by clicking on **Accept** next to their name.

Tip: You can also admit all those on hold by clicking on the three dots ⋮ and selecting **Accept All**.

Share Oodrive Work files in your Tixeo meeting

You can share Oodrive Work files in a Tixeo meeting using a share link.

1. In your Tixeo meeting, click on the **Discussion** tab.

2. Click on the paperclip icon and select **Oodrive Work**.

3. Browse your Oodrive Work file explorer and select the item(s) you wish to share.

4. Click **Share the link**.

   With this link, participants will be able to access the share and will have the option of viewing and downloading the items it contains.

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5.3. 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**.

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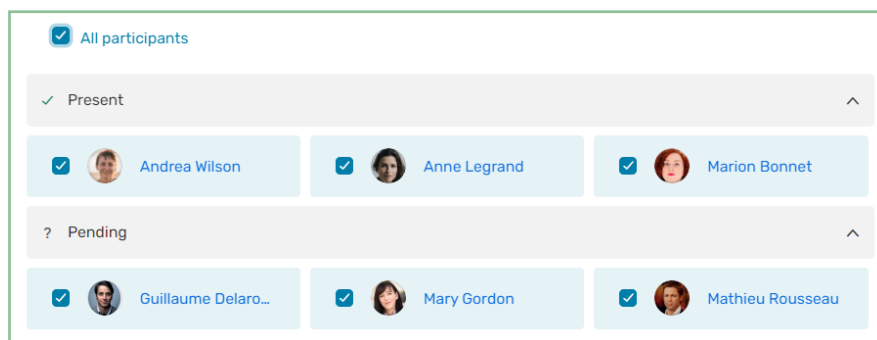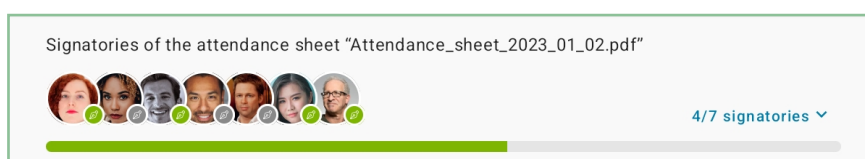

Note: By default, participants who have confirmed their presence and those who have not yet responded are pre-selected.

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:

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Close the attendance sheet

By default, the attendance sheet closes automatically when all participants have signed it. However, if necessary, you can also close the attendance sheet manually, provided that at least one participant has signed it.
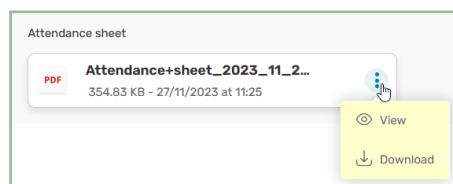
1. In your meetings list, select the meeting you are conducting.

2. Go to the **Agenda** tab.

3. Click **Close the attendance sheet**, then **Close**.

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.

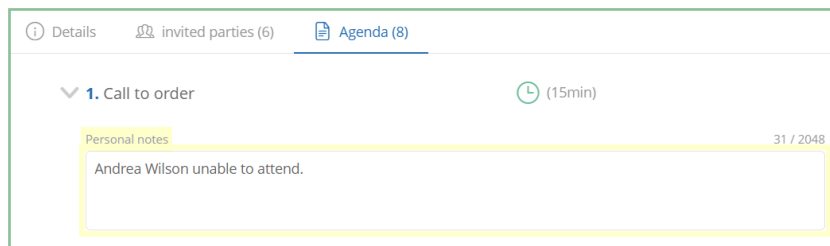3. Click the three dots next to the attendance sheet and select **View** or **Download**.

5.4. Take personal notes

When you are attending a meeting, you may take notes on each item or sub-item of the agenda. These notes are strictly personal and are visible only to you.

1. In the **Meetings** section, select the meeting you are conducting.

2. In the meeting's detailed view, click the **Agenda** tab.

3. Expand the item or sub-item to which you want to add notes.

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4. Write your notes in the dedicated field.

Once added, personal notes are automatically saved and are immediately available to you across all Oodrive Meet (web and mobile).

Please note: If you are the organizer for a meeting, you will only be able to take and view notes from your mobile application.

5.5. Open and close a vote

As a meeting organizer, you have the possibility to gather feedback from meeting participants on a variety of topics via voting. Once created, votes can be opened or closed at any time from the detailed view of the meeting.

Opening a vote

1. In the **Meetings** section, select the meeting you are conducting to access its detailed view.

2. View the voting questions in the **Information** or **Agenda** tab.

3. To open a vote **In preparation**, Click **Open vote** twice to confirm the opening of the vote.
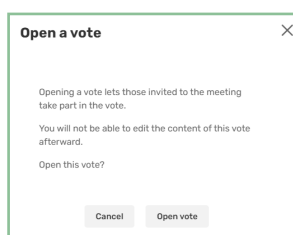
Once voting is open, meeting participants will be able to cast their vote. As the organizer, you have the possibility to take part in the vote if you are also a participant.

Closing a vote

1. In the **Meetings** section, select the meeting you are conducting to access its detailed view.

2. View the voting questions in the **Information** or **Agenda** tab.

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3. Select the **Open** vote you'd like to close, and Click **Close vote** twice to confirm the closing of the vote.
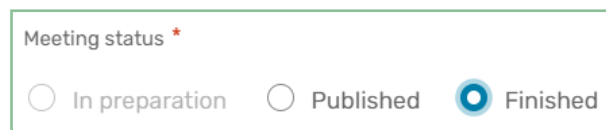
Once the voting session has been closed, results are frozen and participants may no longer participate in the vote. You will then be able to view the final results.

5.6. Conclude the meeting

When your meeting is finished, you can change its status from **Published** to **Finished** to officially conclude the session.

Once this change is made, the meeting content will no longer be editable but documents can still be added as related documents or added to a new agenda item, especially if you wish to add meeting minutes.

1. In the **Meetings**, select the meeting you want to conclude.

2. In the meeting's detailed view, select the **Finished** status.

Meeting status *

○ In preparation   ○ Published   ● Finished

3. Click **Save**.

5.7. Add the meeting minutes

Once the meeting is finished, you can add minutes.

1. In the **Meetings** section, select the meeting to which you want to add minutes.

2. Under **Meeting minutes**, click **Select the minutes**.

3. Click **Import** in the upper right corner of the window.

Documents

🔍 Search for a file or folder   ⬆ Import

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

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4. Browse the file explorer on your computer and select your minutes document in PDF format.

5. Click **Open** to upload the document to your workspace.

6. Click **Add to meeting** then **Save**.

The minutes are added to your meeting. All participants may view and download them.

If you want to modify the participants' permissions over the document, click on the three dots to its right and select **Manage permissions**. In the same manner, If you want to remove the document in order to replace it, select **Remove**.
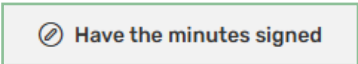
5.8. Have the minutes signed

As the organizer, you can choose to have the meeting minutes signed by the participants. This enables you to officially validate the content of the minutes, guaranteeing their authenticity, reliability and the agreement of the participants on the decisions made.

The minutes become available to be sent for signature once your meeting is **Published** or **Finished**.

Send the minutes for signature

Requirements : To be able to send your minutes for signature, you must first have added them to the meeting.

1. In the **Meetings** section, select the meeting to which you want the minutes signed.

2. Under **Meeting minutes**, click **Have the minutes signed**.

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3. Select the participants who will be required to electronically sign the minutes, then click **Next**.

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

4. Modify the document title if needed, then go to the location where you want to save the minutes.

5. When you have finished, click **Send** to send the minutes for signature.

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

Tip: You can track the progression of signing in real time from the detailed view of your meeting:
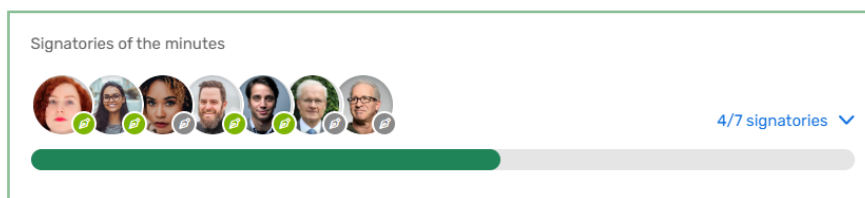
By default, the minutes closes automatically when all participants have signed it.

Close the attendance sheet

By default, the minutes closes automatically when all participants have signed it. However, if necessary, you can also close the minutes manually, provided that at least one participant has signed it.
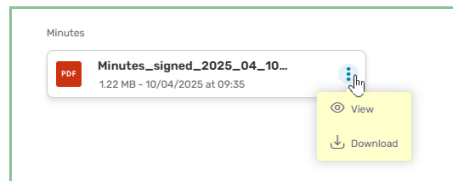
1. In the **Meetings** section, select the meeting to which you want to close the minutes.

2. Under **Meeting minutes**, click **Close the minutes**, then **Close**.

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Download the signed minutes

Once signature collection is complete, the minutes can be viewed and downloaded from the detailed view of your meeting.

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

1. In your meetings list, select the finished meeting.

2. Under **Meeting minutes**, click the three dots next to the minutes and select **View** or **Download**.

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