



Board Connect

Team Owners guide

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Boardconnect.app

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1 Introduction



Preparing and reviewing material for board reports can be extremely time consuming and intensive for admin teams, senior leaders, and board members. In most businesses, preparing, reviewing, and collaborating on board-related documentation is time consuming and inefficient and often done through disorganised processes including emails or ad-hoc conversations. Besides wasting time, this process exposes businesses to unnecessary security risks.

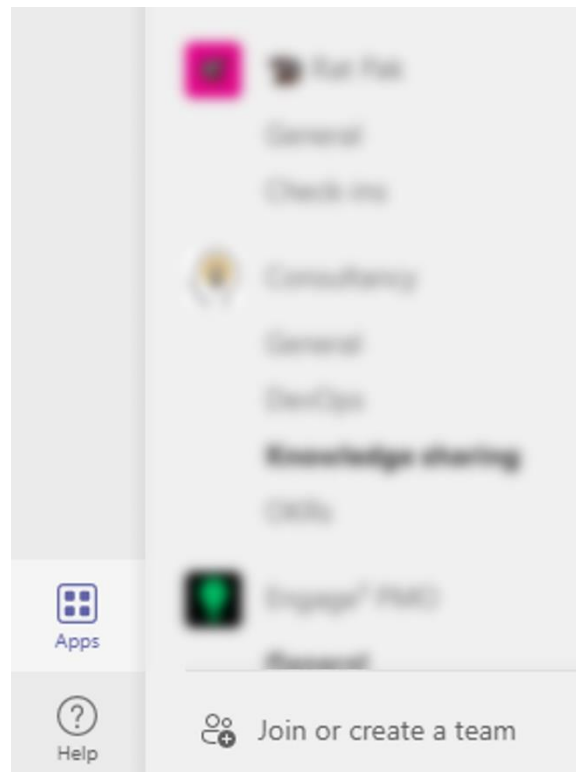
Board Connect is built on Microsoft Teams and addresses the challenges faced by board members, executives, committees, and administrators by improving communications, simplifying collaboration, and enhancing administration documentation preparation and sign-off for committee or board meetings.

Executives, administrators, and committee members benefit from a secure platform for information exchange, improved visibility of the meeting preparation process, a reduction in emails and problems with version management that are all too familiar when using email and file share-based processes.

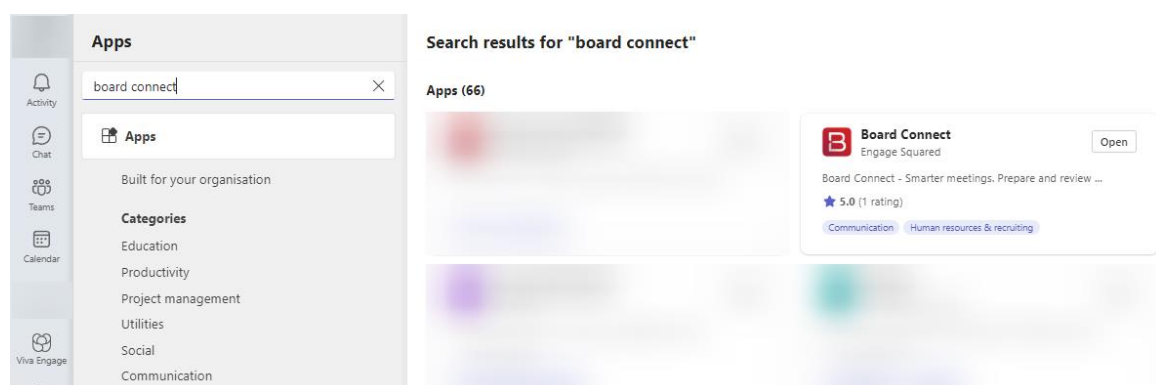
2 Installing Board Connect to the tenant for the first time

To add Board Connect to the tenant;

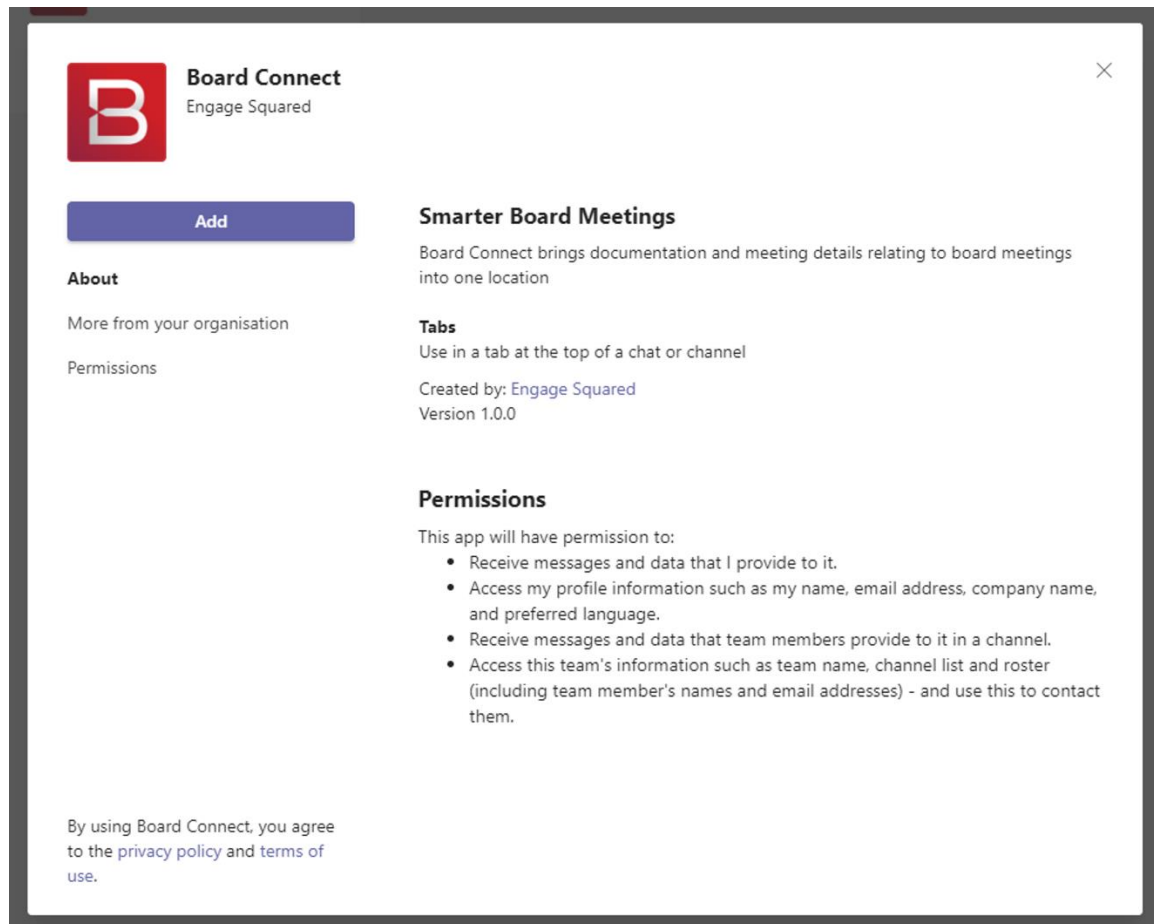
1. From Microsoft Teams, log in as a global administrator so that the account can grant consent.
2. Select 'Apps' in the bottom-left of Teams.



3. Search for Board Connect.



4. Select Board Connect from the list.
5. Click Add.



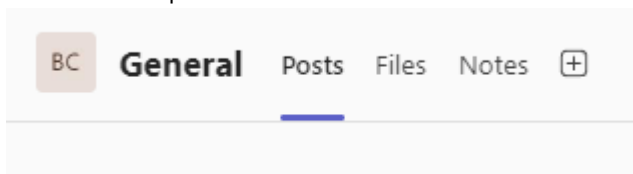
6. If this is the first time Board Connect is being added to Microsoft Teams, a global administrator will need to log in to the app.
7. A Microsoft admin consent dialog will appear, requesting the admin to review and accept the permissions for the organisation. Click Accept.
8. Click Save on the configuration dialog.
9. Click Login to start using Board Connect.

3 Adding Board Connect to a Team

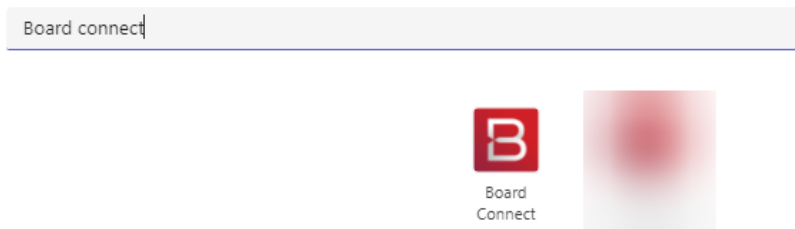
Start by setting up a Microsoft Team specifically for board or committee meetings.

To add Board Connect to the Team:

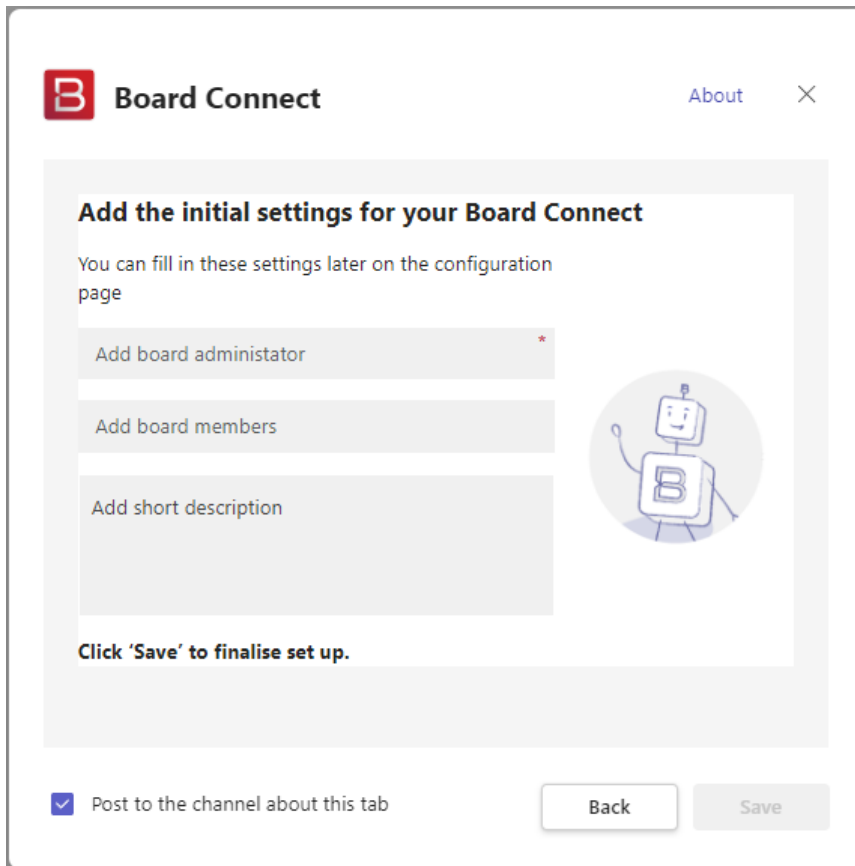
1. Navigate to an existing Team or create a new Team.
2. Navigate the desired channel for Board Connect. Usually this will be the 'General' channel, but in existing Teams or with Teams with multiple channels, this could be a specific channel.
3. From the top of the channel, select the + icon to add a tab



4. Search for 'Board Connect' within the Apps screen search box.
5. Select Board Connect from the Microsoft Teams App Store.

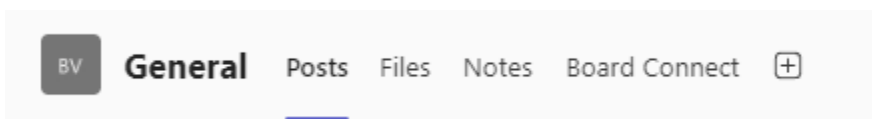


6. Follow the prompts in the Board Connect app. These include selecting a Board Administrator, Board Members and a description. You can choose to post to the channel about this new tab by selecting the checkbox.



Note: For further information on setting up draft meeting functionality, refer to Section 7 – Draft Meetings.

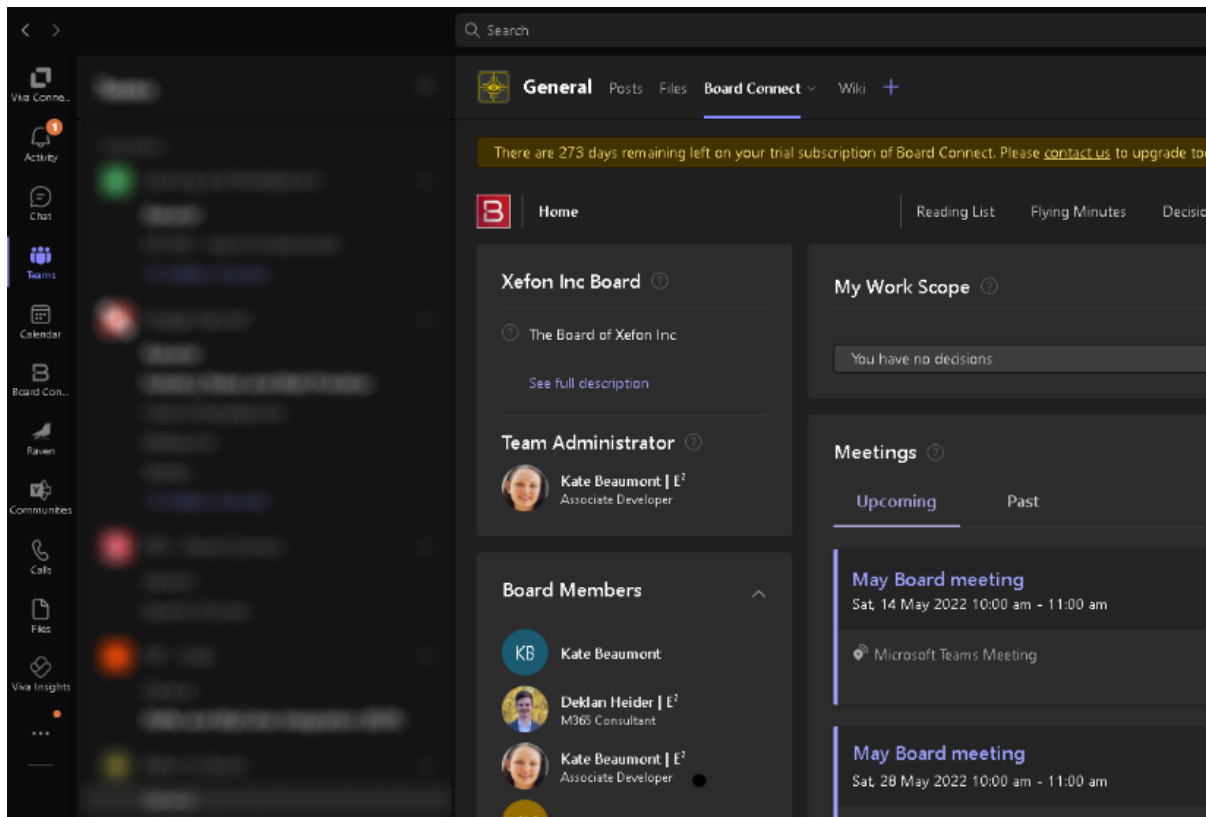
7. Click Save to continue
8. A Board Connect tab will now appear in the selected channel of the team (usually the General channel).



4 Adding a Board Connect tab to the App Bar

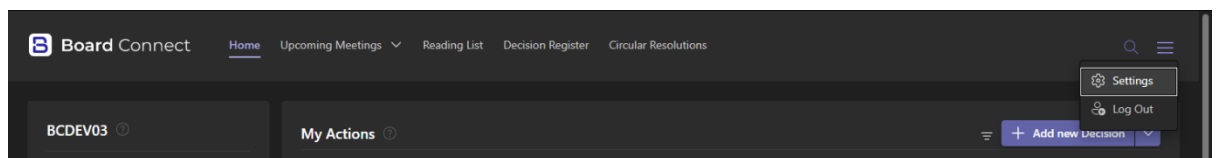
As a team owner who may manage multiple teams, or a Board Member, it can be handy to have fast access to Board Connect.

To add Board Connect to the Teams App Bar, it must first be enabled, then it needs to be pinned.

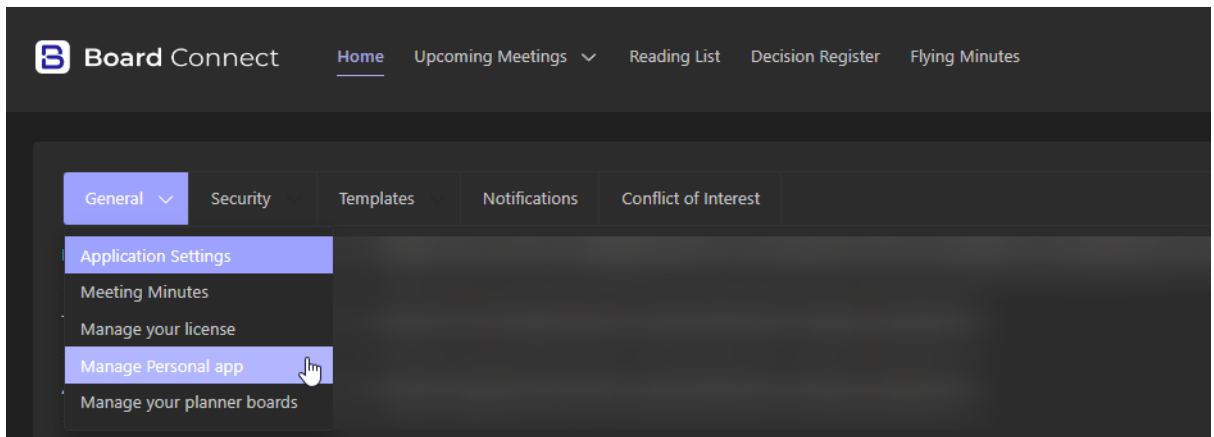


4.1 Enable the Personal Tab

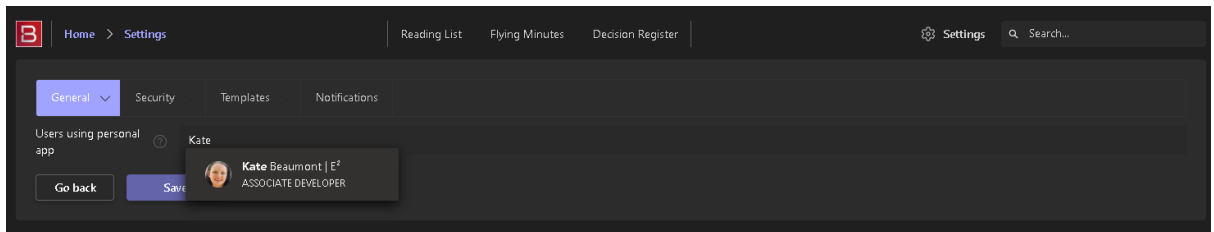
1. Within the Board Connect Dashboard, click on the menu in the top right and select Settings.



2. From the General drop-down, click on *Manage Personal app*



3. Under the *Users using personal app* list, type the names of those who need the app to appear in the toolbar and click on them to select them. Click Save when all the names have been added.

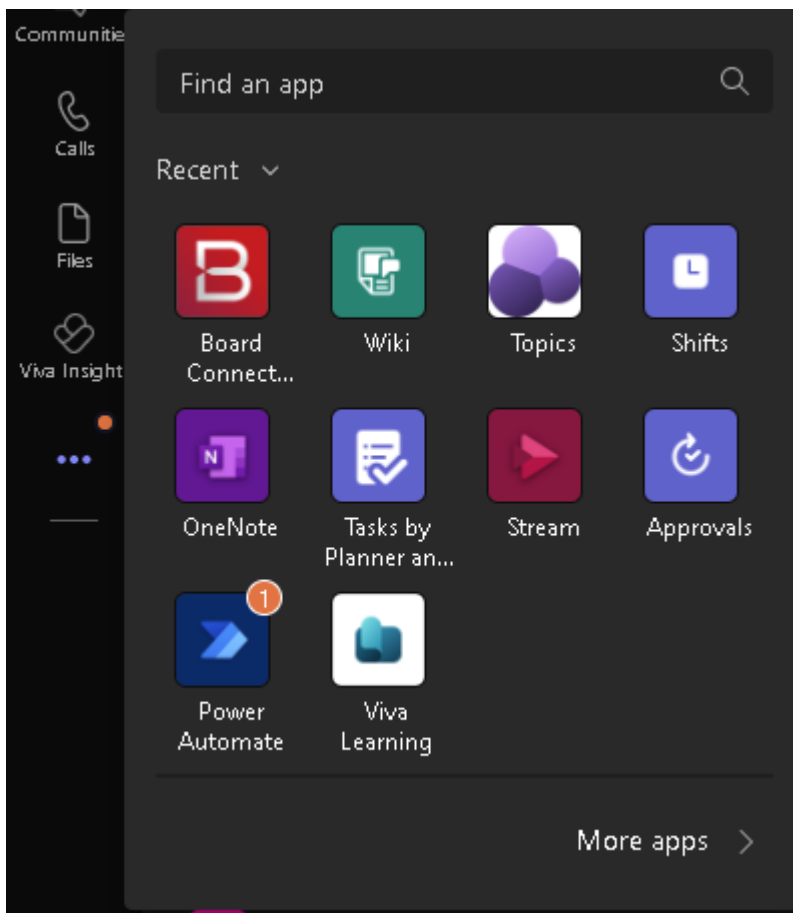


4. To remove users, click on the x next to an existing users' name & Click on Save

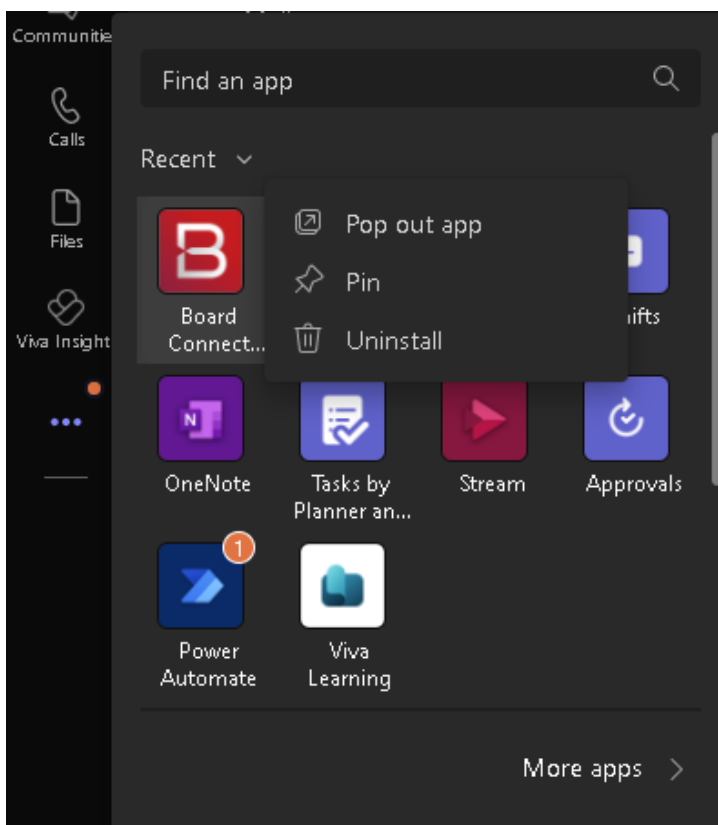
4.2 Pinning Board Connect to the App Bar

Note: the App Toolbar has a maximum of 11 icons displayed at once. If there are already 11 icons present in the bar, one will need to be unpinned prior to pinning Board Connect.

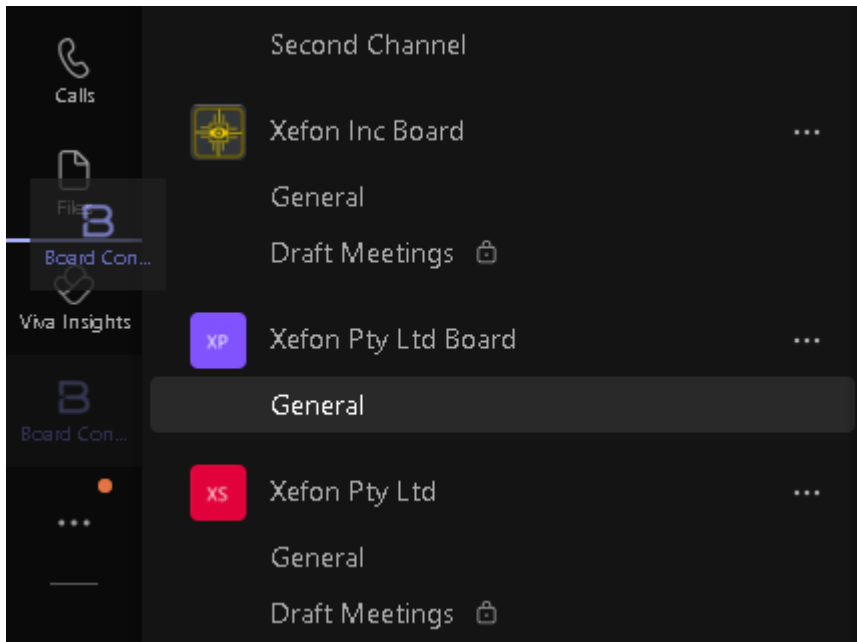
1. In the App bar, click on the ellipsis. Then right-click on Board Connect.



2. Click on the *Pin* option.

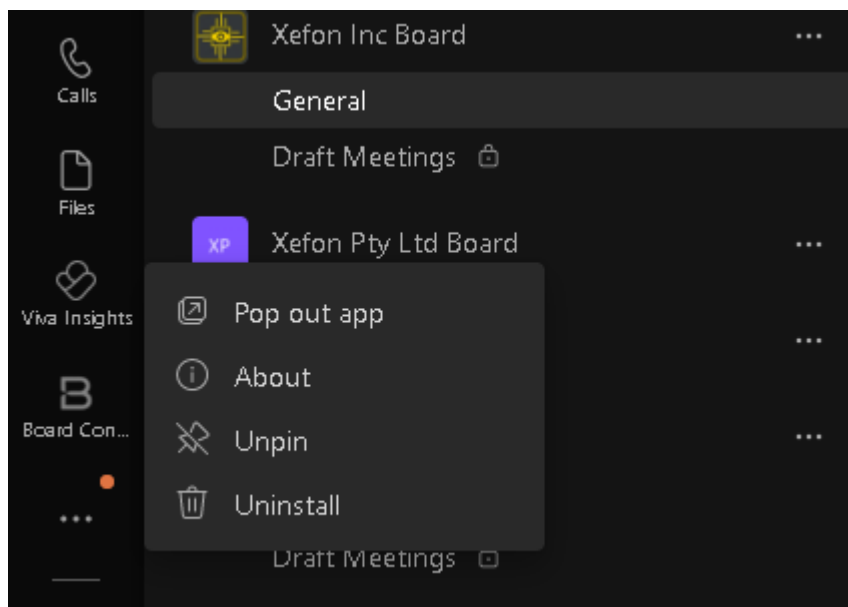


3. To move the app around the bar, click and hold and drag it up or down as desired.



4.3 Removing an App Icon from the Icon Bar

1. Right-click on the target app and click *Unpin*.

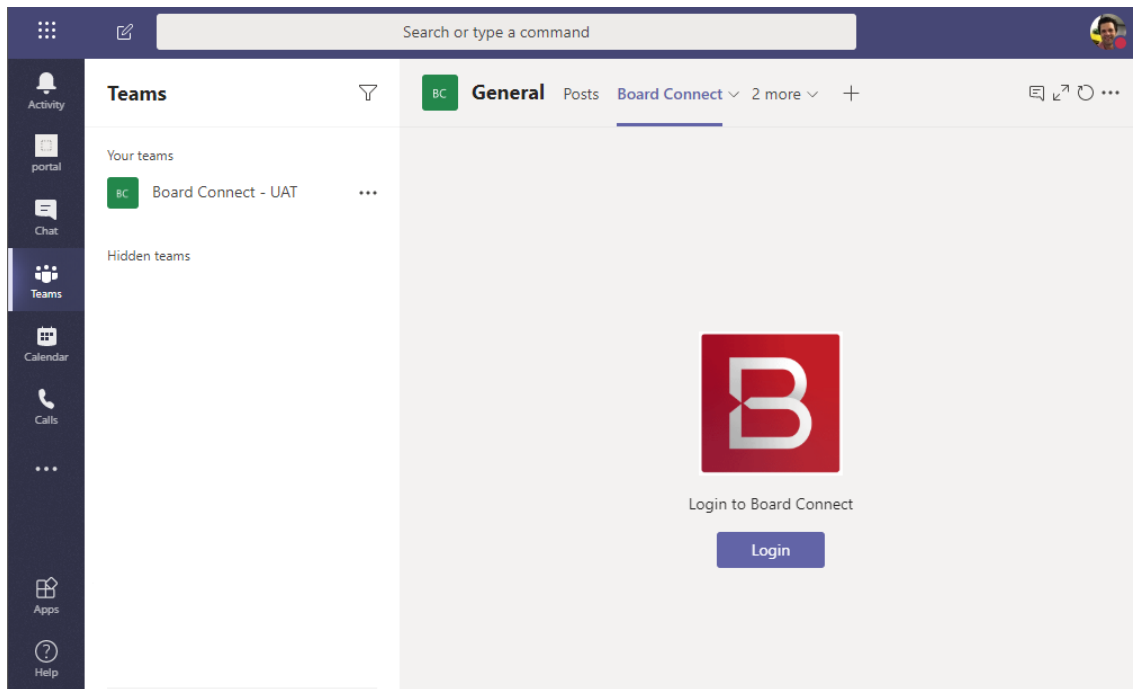


5 Getting the Board Microsoft Team ready

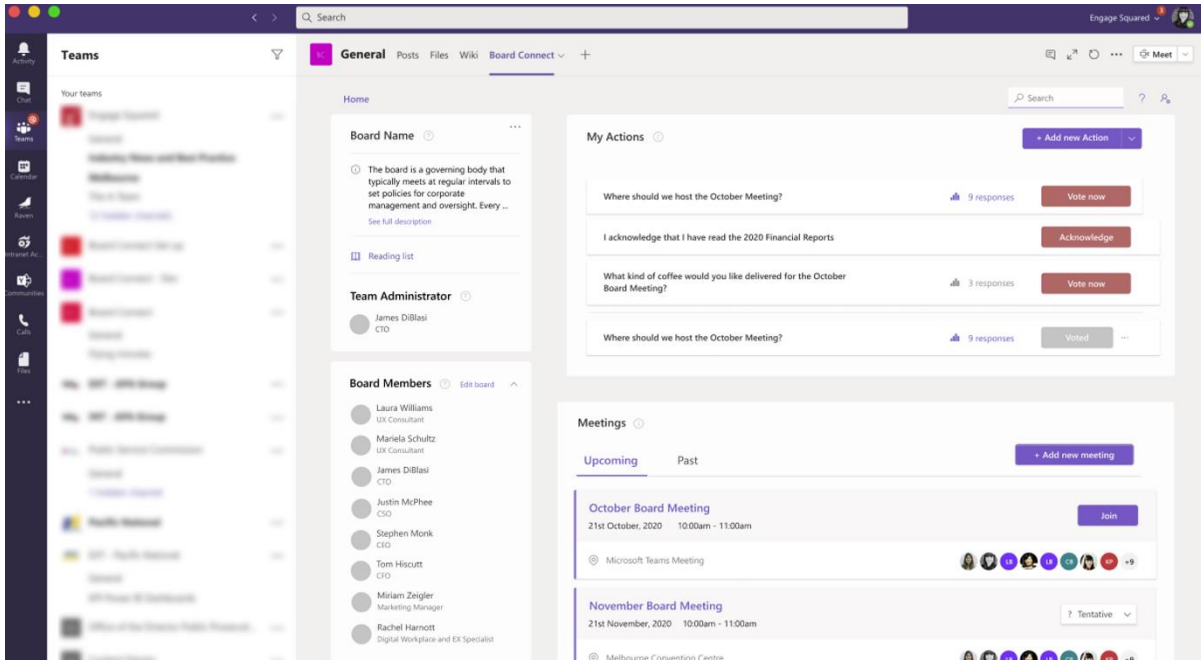
Success! Board Connect has been installed as a new app in the Team.

5.1 Authentication

After clicking on the Board Connect tab in the Team, there will be a prompt to Login. Use the usual O365 account to login.



After logging in, the Board Connect tab will appear within the channel of the relevant Team (usually the General channel). From this view, the details of the Board and its meetings can be entered. These details will be displayed on this landing page.

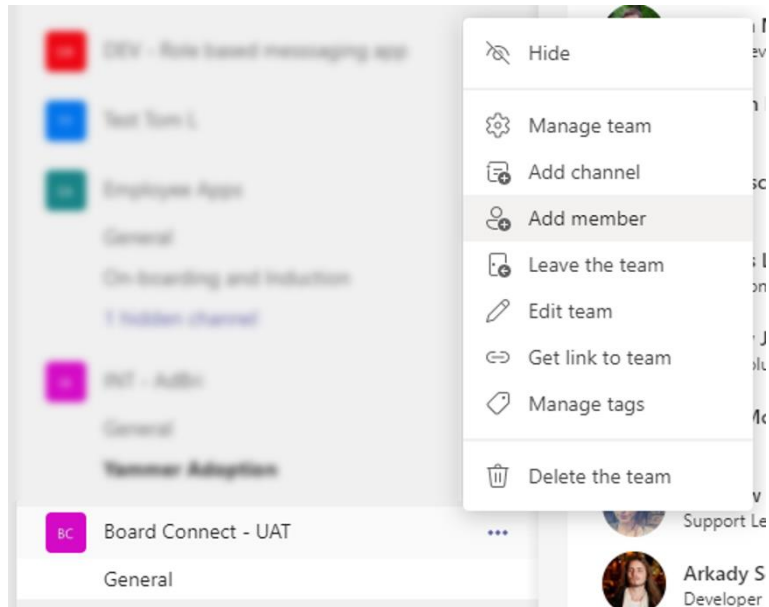


The dashboard landing page enables management and coordination of all administrative aspects of the Board. This includes viewing all upcoming and past meetings from the Board Connect dashboard.

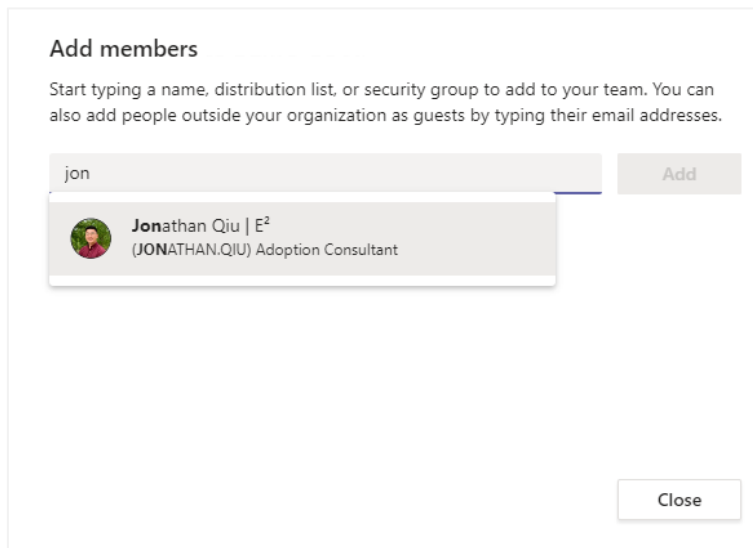
6 Managing Team members

6.1 Add a member

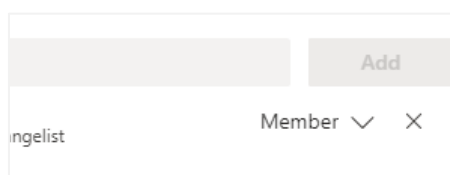
1. Click on the ellipsis button (...) next to the Team name and click 'Add member'.



2. Type the name in the box, select the person from the dropdown list and click Add.



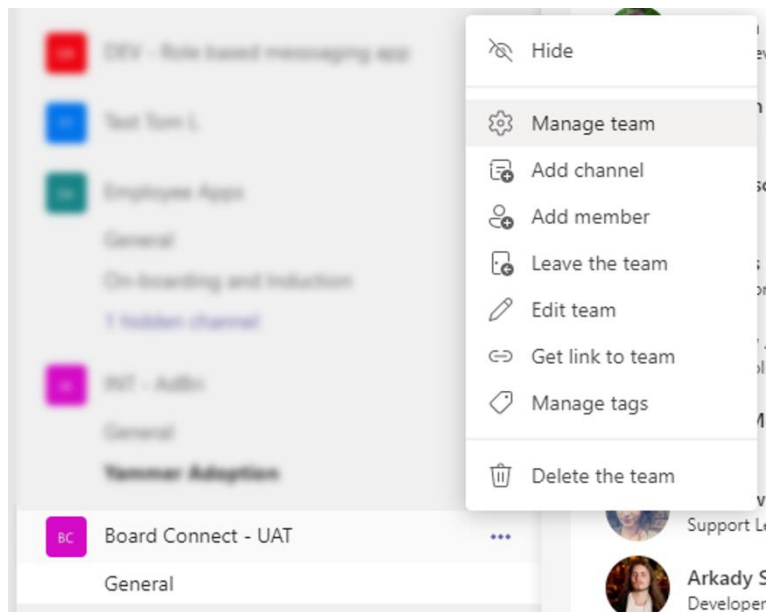
3. Ensure they are set to be a member and click Close.



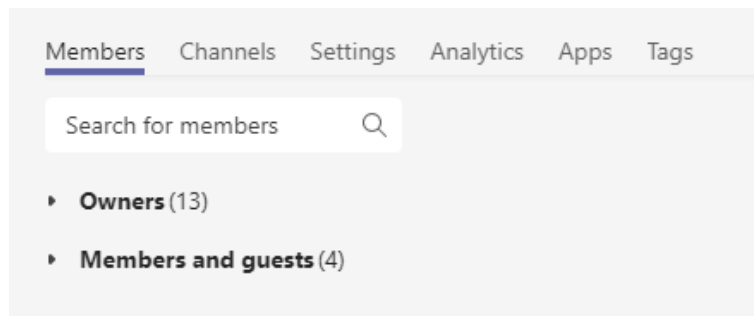
6.2 Remove a member

Note: To remove an owner, first make them a member as shown in 6.3.





1. Click on the ellipsis button (...) next to the Team name and click Manage Team.



2. Click on the Members and guests heading to open the section.

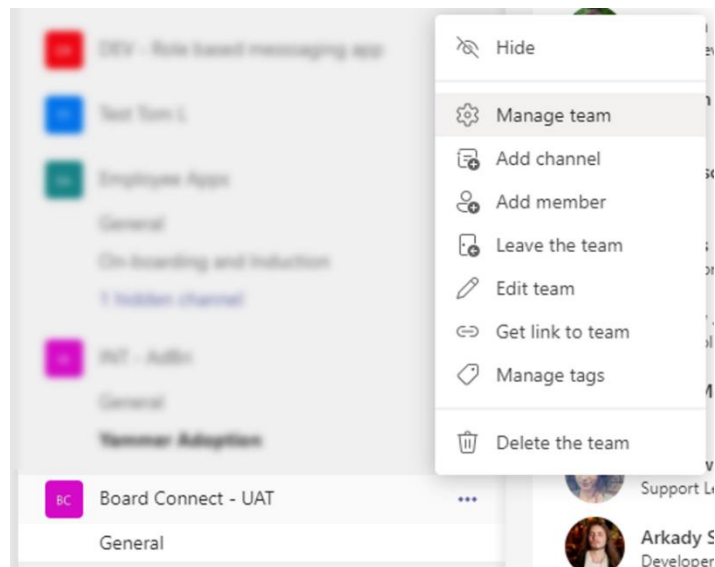


3. Click on the × beside the person to be removed from the team.

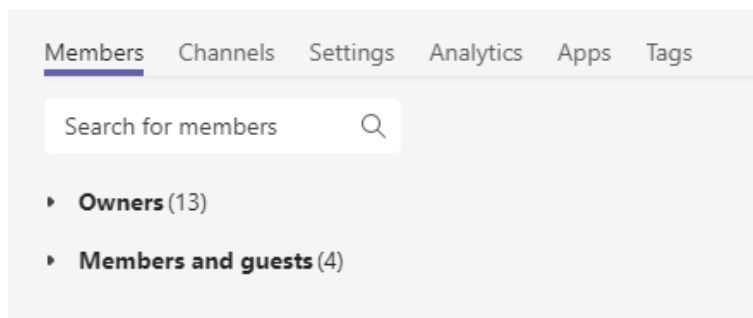
Members and guests (4)				
Name	Title	Location	Tags	Role
 Kirsty Walker E ²	Cloud Consultant	Brisbane		Member ▼ ×
 Andrei Butyrchyk E ²				Member ▼ ×
 David Fogarty E ²	Senior Project Manager	Sydney		Member ▼ ×
 Vladislav Mihasev E ²				Member ▼ ×

6.3 Change a member's role

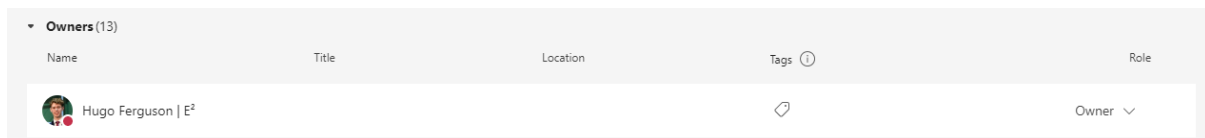
1. Click on the ellipsis button (...) next to the Team name and click Manage team.



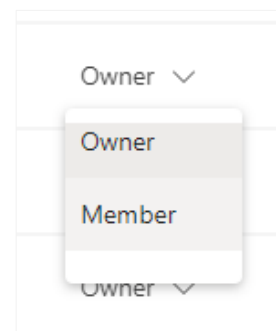
2. Click on the Owners heading or Members heading to open the section.



3. Click the Role dropdown button next to the Team Member.



4. Select Member to reduce privileges to the Member, or Owner to elevate privileges.

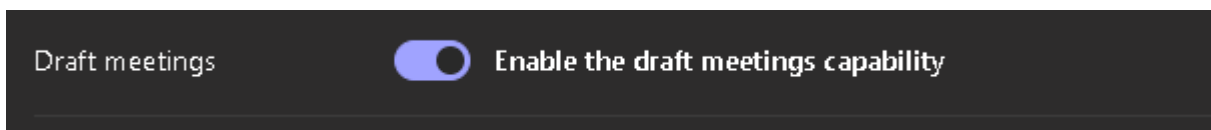


7 Draft Meetings

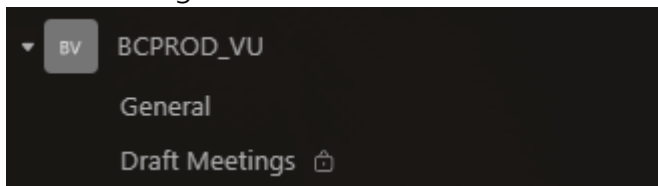
Draft Meetings is a private channel which acts as a collaboration space for board secretaries, both to add staff to manage documents and to finalise information prior to issuing invitations to board meetings.

7.1 Setting up a Board for Draft Meetings

1. Under Board Configuration > General > Application settings menu, under Draft Meetings, check the Enable the draft meetings capability slider.

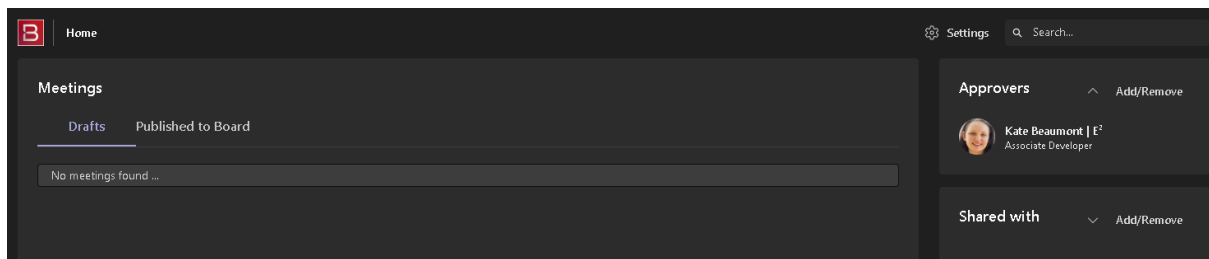


2. Click Save
This will create a Teams Channel called "Draft Meetings" to review the draft meetings.

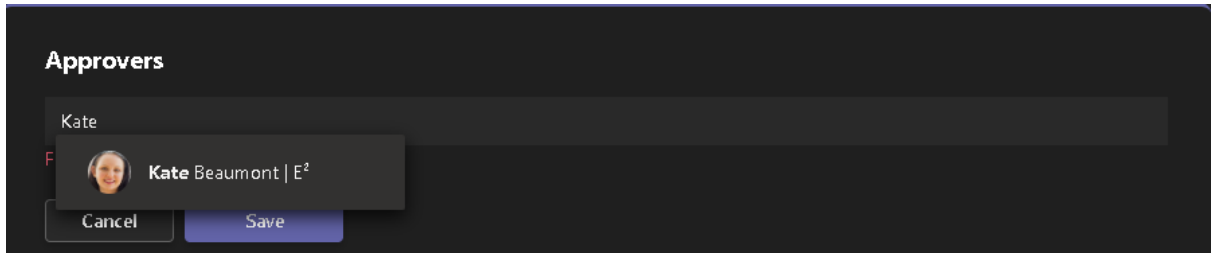


7.2 Setting Approvers for Draft meetings

When draft meetings are created, team members can be selected to approve 'draft meetings'.



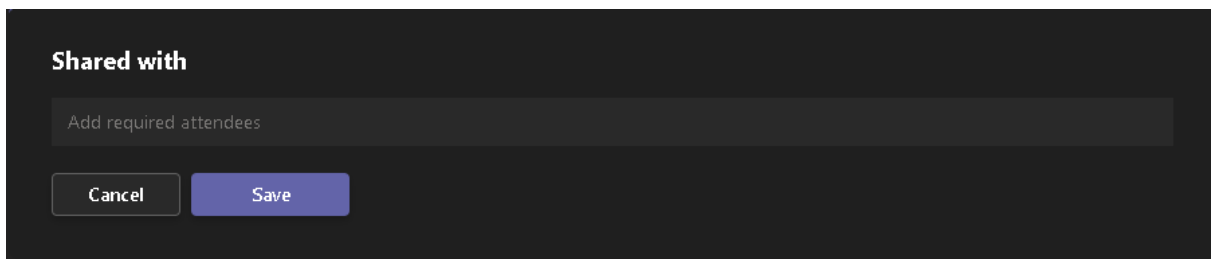
1. Browse to the Draft Meetings Channel > Board Connect tab.
2. Under Approvers, click Add/Remove.
3. Type in the team member/s, click on their name to select them, and click Save.



7.3 Setting notifications of Draft meetings

When draft meetings are created, specific team members can be sent notifications.

1. Under Shared With, click Add/Remove.
2. Type in the team member/s, click on their name to select them, and click Save.



7.4 Scheduling a Draft meeting

1. While creating the meeting, check the Create as a draft meeting checkbox.

Add new meeting

General Attendees Permissions Documents Summary

Add meeting title

Start Date & time

20 Dec 2023 10:00 AM

End Date & time

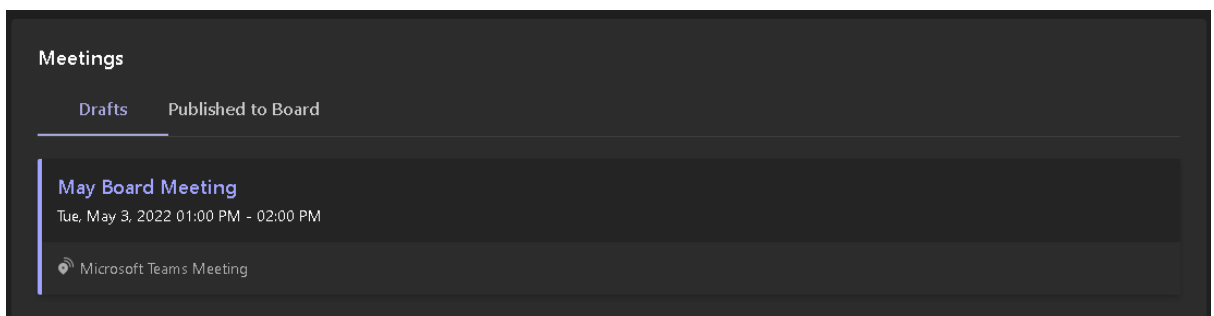
20 Dec 2023 11:00 AM

Add a location

Add short description

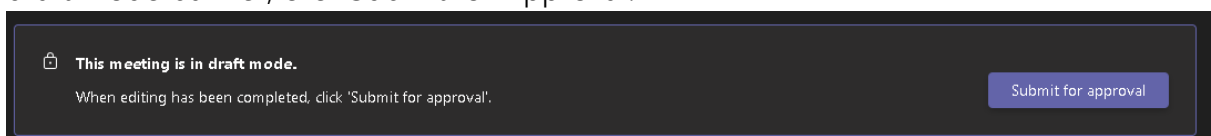
Create as a draft meeting ?

- Any draft meetings will appear under the Drafts tab. When a meeting is 'approved', it will appear under the Published to Board tab.



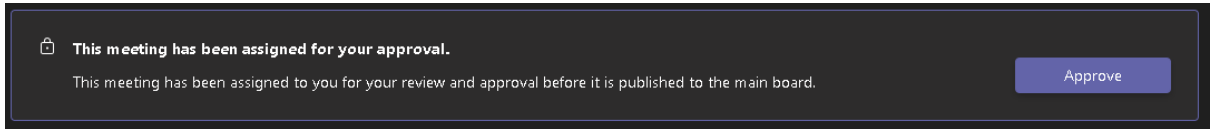
7.5 Editing and submitting Draft meeting for approval

- Open the meeting by clicking on the meeting title.
- Once all required changes have been made, within the This meeting is in draft mode banner, click Submit for Approval.

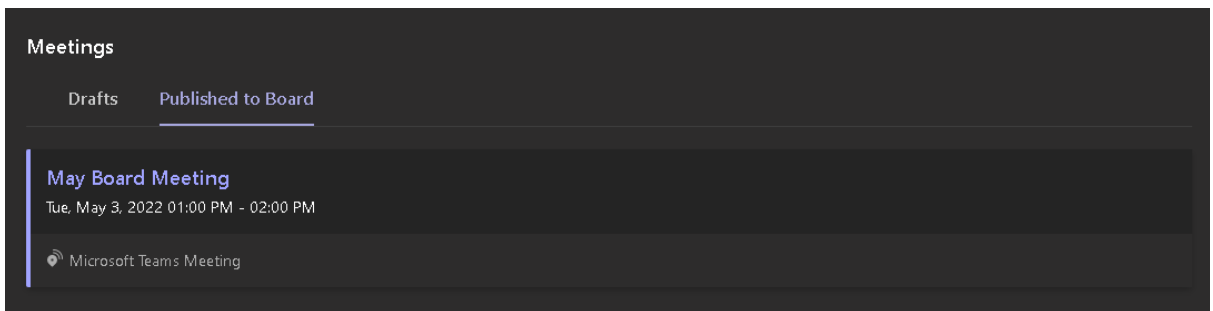


7.6 Approving a draft meeting

1. As an approver, in the Draft Meetings channel, browse to the Board Connect tab & Open the meeting by clicking on the meeting title.
2. Within the This meeting has been assigned for your approval tab, click Approve.



3. The meeting will be moved to the Published to Board tab and will appear in the General channel.



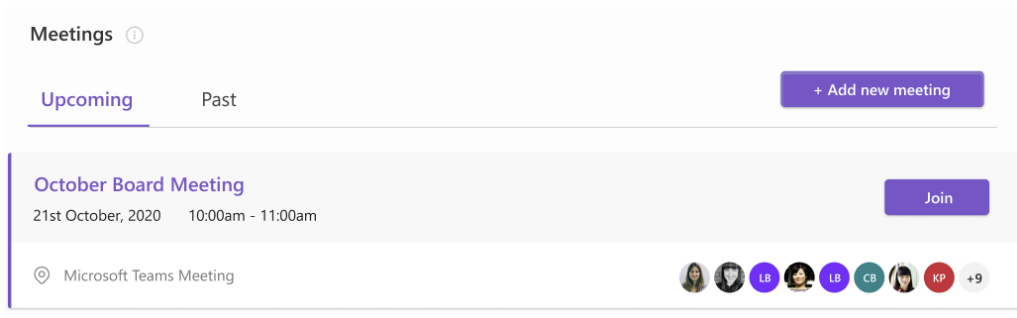
Note: once meetings have been approved, they cannot be reverted back to a draft version.

8 Manage meetings

To create a meeting in the Board Connect-enabled Team, click the Add new meeting button and enter details that describe key meeting information. This provides a point of reference for key board meeting details and acts as a point of collaboration for information before, during and after the meeting.

8.1 Add a new meeting

1. Click + Add new meeting.



2. Enter the General details of the meeting and click 'Next' to move to the Attendees tab. Do the same for Attendees, Permissions and Documents. On the final Summary tab, review the meeting details. Any missing required fields will be highlighted in red. At any time, you can click on a tab name to jump to that section. Once the meeting details are correct, click 'Save' on the Summary tab to save and create the meeting.

General details

Field Name	Description
Add meeting title	The name of the meeting. This value will be used as the meeting invitation title, and will be the consistent reference within Board Connect
Start Date & Time	The date and time the meeting is to commence
End Date & Time	The date and time the meeting is expected to conclude. This expected time is not a hard stop, and the Microsoft Teams meeting will continue to run for as long as the participants need.
Add a location	The location field to be displayed within the Microsoft Teams Calendar, and within the email calendar invitation.
Add a short description	A description of the meeting that will be displayed to users in the meeting details.
Create as a draft meeting	Create the meeting in draft mode (see Section 7 – Draft Meetings)

Attendees details

Field Name	Description
Meeting owner	<i>Note: Only one user can be the meeting owner.</i> The meeting owner provides the selected user account extra functionality to be able to assist in managing the meeting with items such as: <ul style="list-style-type: none"> - Attendance - Minutes - Editing the meeting

Add required attendees	Users allocated in the required attendees will be added to the 'Required' field within the email invitation.
Add optional attendees	Users allocated in the optional attendees will be added to the 'optional' field within the email invitation.

Permissions details

Field Name	Description
Set your permission for the meeting	<p>Everyone has access to manage the meeting; This allows all meeting invitees to have access to manage the meeting, change board papers, conduct roll call etc.</p> <p>Only the Board Administrators and meeting organizer can manage this meeting;</p> <p>This restricts access so that only the Board Administrator and the meeting organizer (referred to as the meeting owner) can manage the meeting.</p>

Documents

Field Name	Description
Copy meeting minutes from	Select and copy previous meeting minutes from a previously held meeting.

Once a meeting has been created a folder will automatically be created within the Team's General 'Files' tab, this folder is used to store all related documents for the meeting.

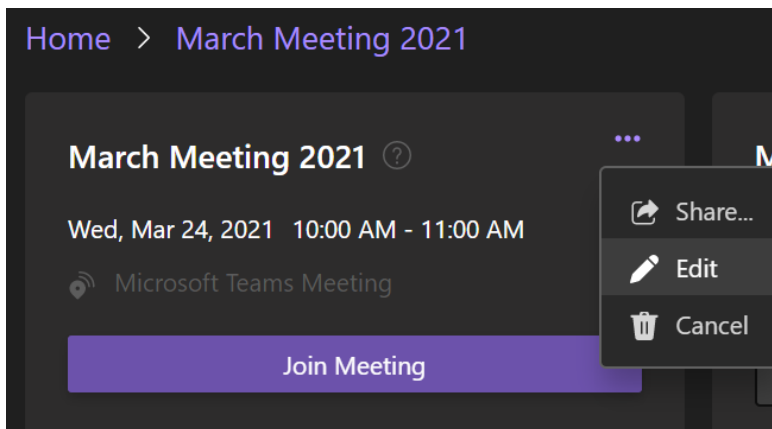
Selecting an individual meeting from the Board Connect landing page will open a new window with further details regarding the meeting's documents, topics, templates, team members and contact information.

8.2 Editing a meeting

Once a meeting has been created, both administrators and the *Meeting Owner* can change the name, description and the date/time of the event.

To edit the meeting;

1. Browse to the Board Connect landing page.
2. Open the meeting you want to edit by clicking on its title.
3. Click the ellipsis button (...) beside the meeting title, then Edit.

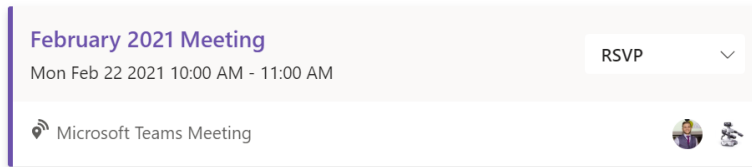


4. After making your changes, go to the Summary tab & click Save

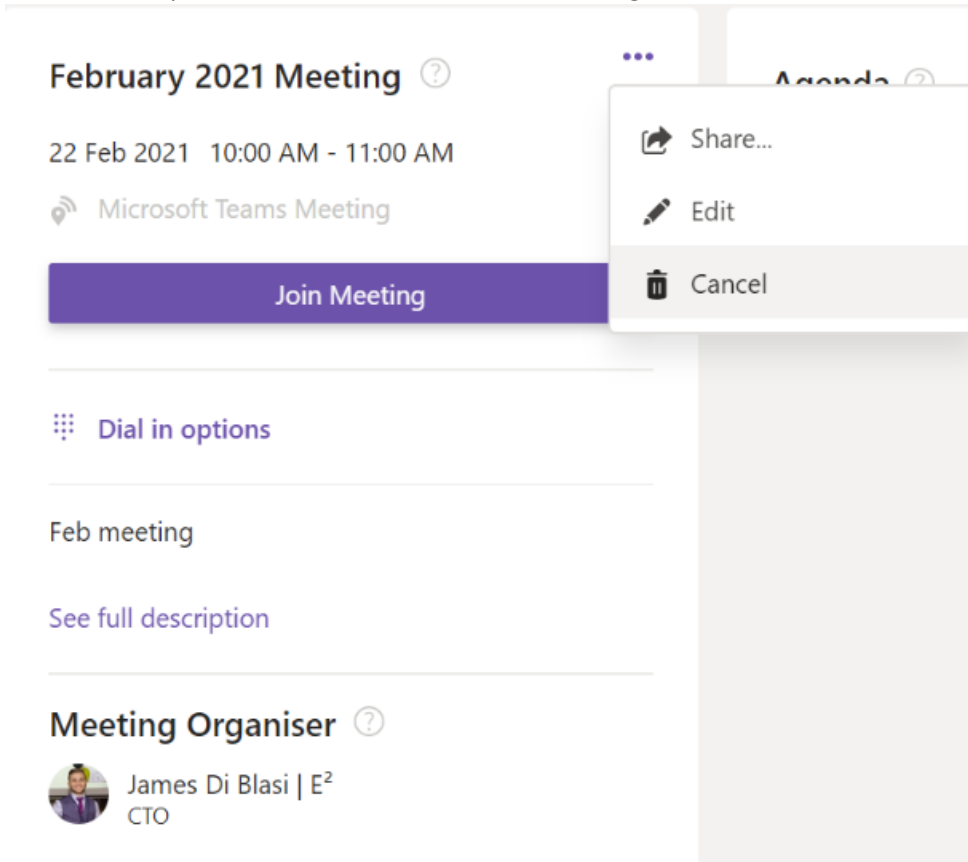
8.3 Cancelling a meeting

To cancel a meeting;

1. Browse to the Board Connect landing page.
2. Open the meeting you want to cancel by clicking on its title.

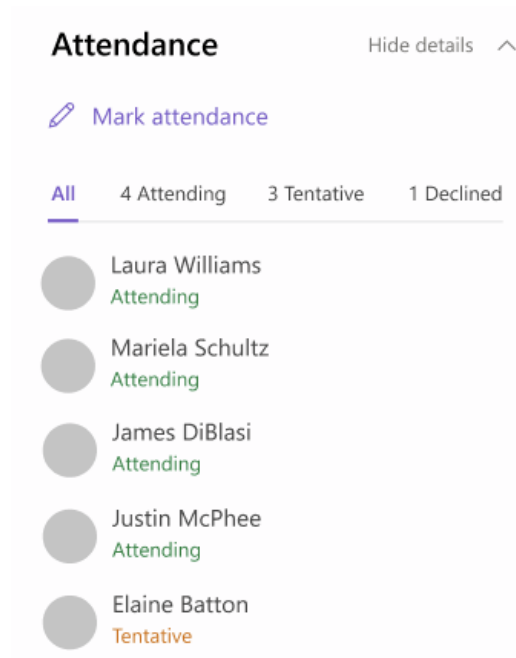


3. Click the ellipsis button (...) beside the meeting title and click **Cancel**.



8.4 Meeting responses

When a meeting is created within Board Connect, a meeting invitation is sent to all invited users. Responses to the meeting invitation are displayed within the Attendance panel of the selected meeting.



8.5 Marking attendance

Typically, at the end of the meeting the Board Secretary will select whether the user has attended the meeting. This data is recorded and can be reported on accordingly.

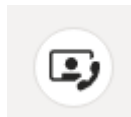
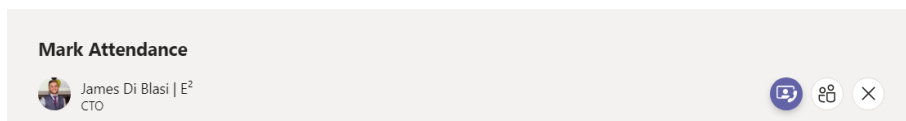
Note: To mark the attendance of the meeting, the logged-on user must be selected as the 'Meeting Owner'. For more details about the Meeting Owner role, please see section 6.

To mark attendance of the meeting;

1. Browse to the meeting for attendance marking.
2. Click Mark attendance.



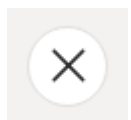
3. The Mark Attendance dialog will appear, for each user select whether the user attended via teleconference, in person, or the user did not attend at all.



User attended via teleconference



User attended in person



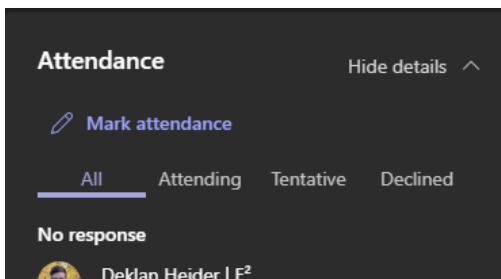
User did not attend

8.6 Closing a meeting

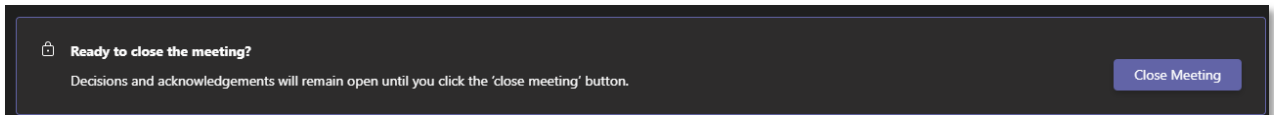
After a meeting has ended, the option to close the meeting is available after which the polls, decisions, actions, and meeting minutes are locked and shown in a summary of the meeting.

Before closing a meeting, it is important to make any changes to meeting minutes including generating minutes, actions etc. first, as these items will be locked once the meeting is closed. The attendance of the meeting must be recorded before a meeting can be closed, if this is not done, the meeting cannot be closed.

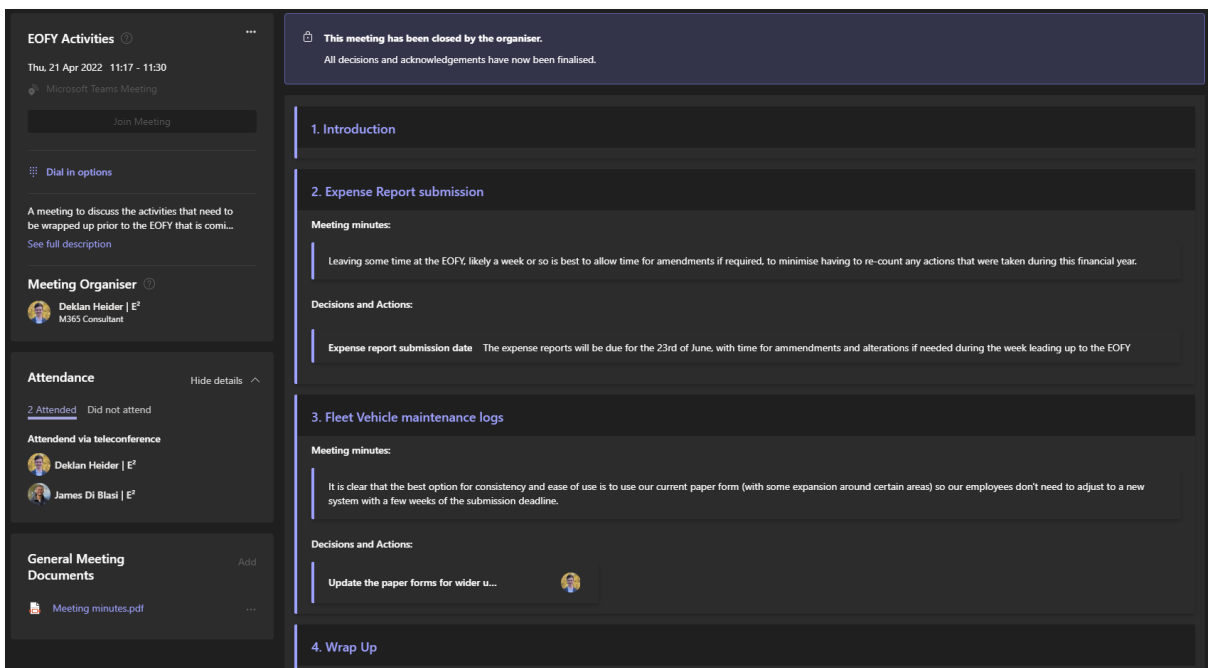
1. Navigate to the meeting, using the past meetings tab on the landing page.
2. Mark the attendance (if already completed, skip this step).



3. Click Close Meeting.



4. The meeting summary screen is now visible.

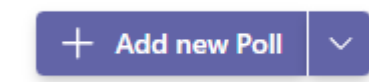


9 Voting

The voting feature of Board Connect provides organisations the ability to create quick polls or decisions, assign them to users and receive responses and/or make decisions more quickly and effectively.

9.1 Creating a Poll

1. Navigate to the meeting for the poll.
2. To create a poll, click Add new Action button.



3. A dialog box will show, requesting key information regarding the poll. Fill out all required fields and click Save.

Title	Title of the poll
Description	Further context for the responder of the poll to review.
Options	Voting options the responders of the poll can select. A poll can support up to 10 options.
Start Date & time	The start date & time when a poll can be available for responses.
End Date & time	The end date & time when a poll can be available for responses.
Responses required from	<p>The responses required from option allows the poll creator to select who should receive the request to respond to the poll.</p> <p>This includes:</p> <ul style="list-style-type: none">• Everyone on the Board; All users who have been added as the Board Member role.• Select team members; Manually select users from the team to respond to the poll

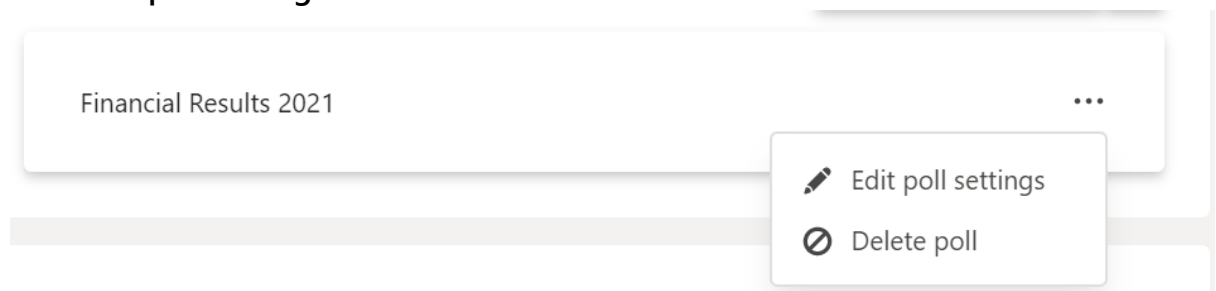
Anonymous voting	Hides member votes and only shows poll response.
Associate a document	Associating a document allows for organisations to directly vote against approving a specific document.

9.2 Edit a Poll

Once a poll has been created, all poll fields can be edited before the scheduled start poll time.

To edit a poll, follow these steps

1. From the My Actions Panel, click the ellipsis button (...) next to the Poll title.
2. Click **Edit poll settings**.

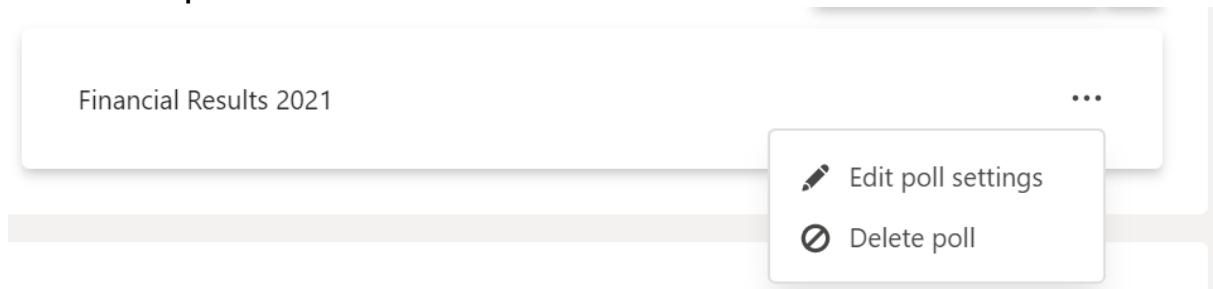


3. Update the poll settings and click **Save**.

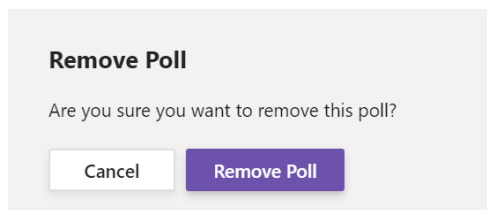
9.3 Remove a Poll

To remove a poll;

1. From the My Actions Panel, click the ellipsis button (...) next to the Poll title.
2. Click **Delete poll**.



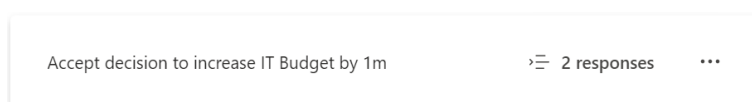
3. You will be prompted to confirm deletion of the poll. Click Remove Poll to remove the poll.



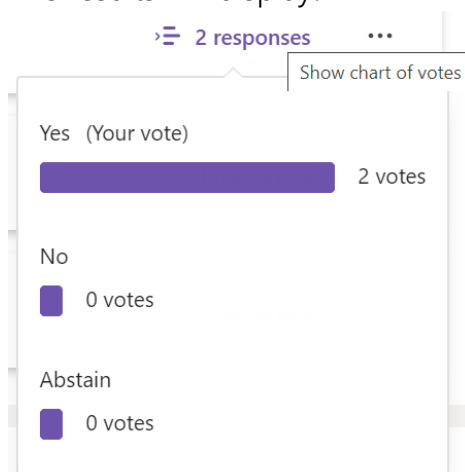
9.4 Check results of a Poll

To check the results of a poll;

1. From the My Actions Panel, hover over the number of responses.



2. The results will display.



10 Flying Minutes

Flying Minutes are decisions that are to be made outside of meetings by one or more board members. Flying Minutes are an efficient means of making decisions when a meeting is not required to reach a decision.

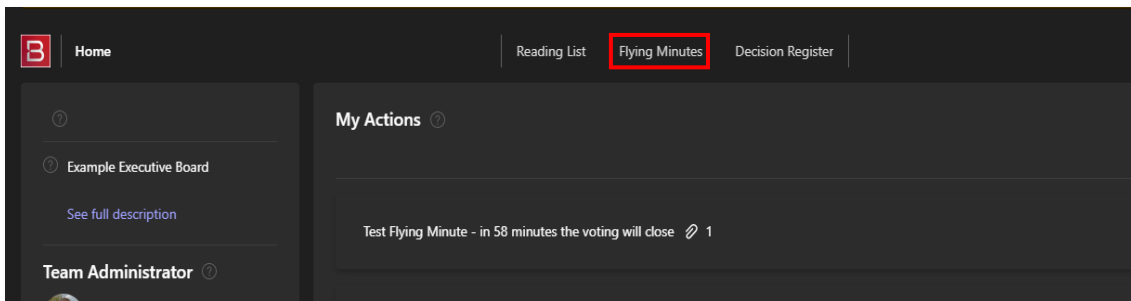
When a Flying Minute is created, an email with links to the attached files is sent out to the relevant members. The board administrator creating the Flying Minute can choose whether to request responses from the whole board or select individuals as well as whether the Flying Minute votes should be anonymous.

Each member can then vote during the allocated decision time, after which the Flying Minute is closed for voting and responses.

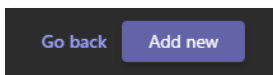
Once the allocated end time has passed, users can no longer respond to the Flying Minute or change their vote.

10.1 Creating a Flying Minute

1. Navigate to the Flying Minutes tab at the top of the app.



2. From the right side, click the Add new button.

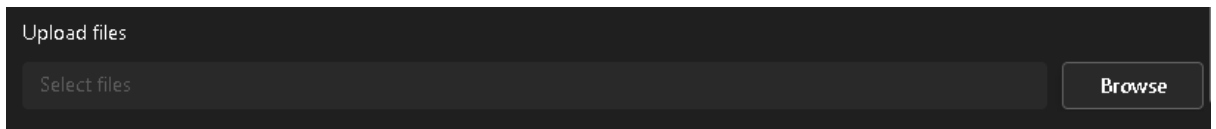


- A dialog box will show, requesting key information regarding the poll. Fill out all required fields and click Save.

Title	Title of the flying minute
Description	Further context for the responder of the flying minute to review.
Options	Voting options the responders of the poll can select. A flying minute can support up to 10 options.
Start time	The start time when a poll can be available for users to respond to.
End time	The end time when a poll can be available for users to respond to.
Responses required from	<p>The responses required from option allows the poll creator to select who should receive the request to respond to the poll. This includes:</p> <ul style="list-style-type: none"> • Everyone on the Board; All users who have been added as the Board Member role. • Select team members; Manually select users from the team to respond to the poll
Anonymous voting	Allowing anonymous voting will ensure that no names are shown, only votes.

Supporting Attachments	Attach files that are relevant for decision makers' consideration in relation to the Flying Minute.
------------------------	---

4. Upload any documents that are required for the decision makers consideration when voting on the flying minute.



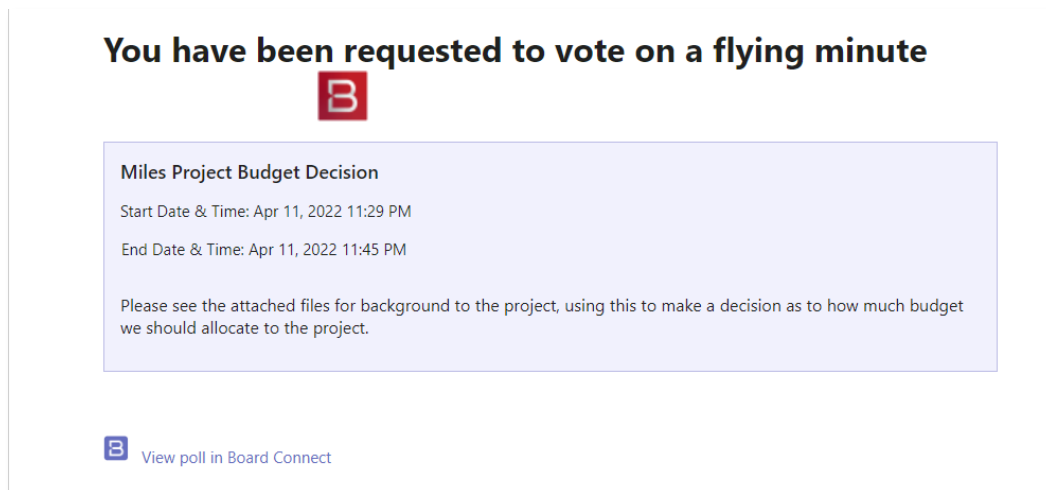
5. Click Save.

Once the flying minute is created an email will automatically be sent out to the selected team members or entire board.

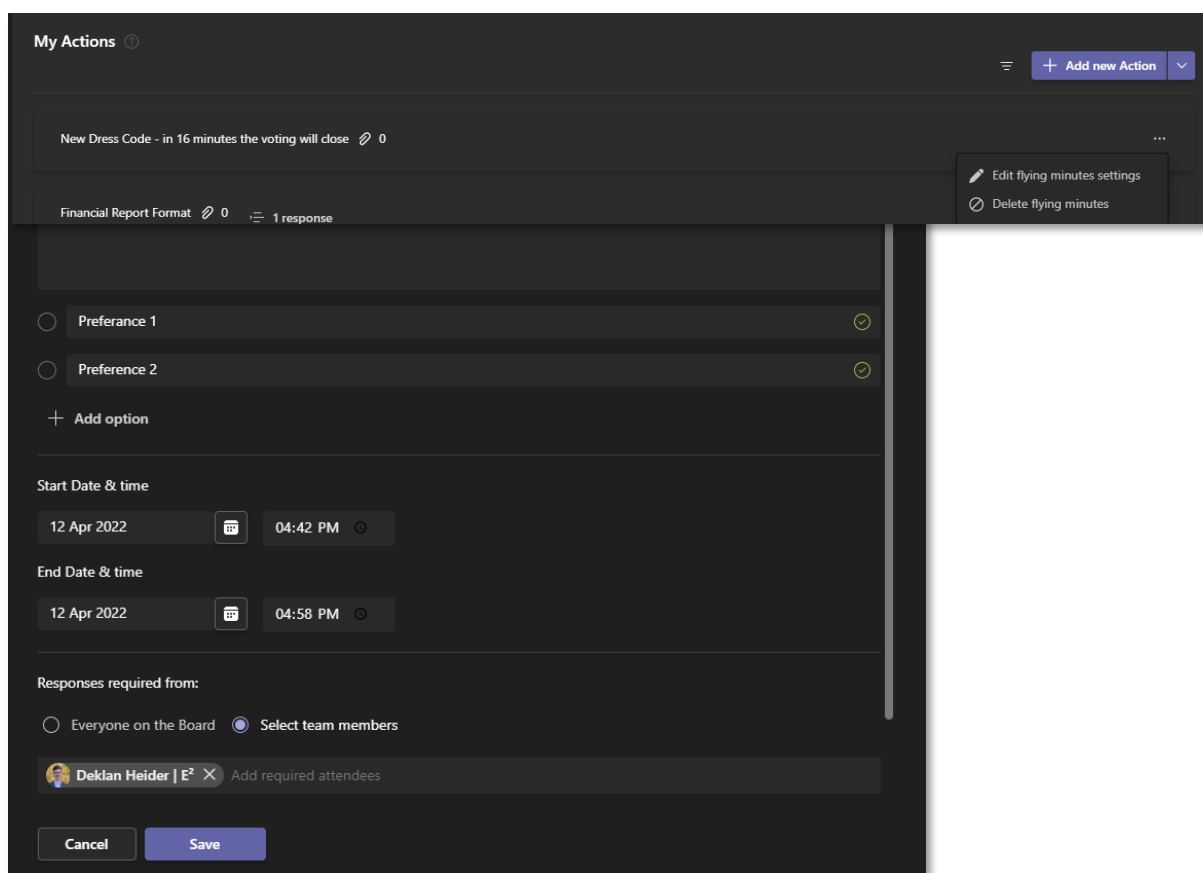
Voting on the flying minute can only occur during the start date & end time selected, users cannot vote outside of these times, and the vote now button will disappear after the allotted time has passed.

10.2 Editing a Flying Minute

Flying Minutes can only be edited by their authors, and only before the Flying Minute has reached the end of its set time.



1. From the landing page, find the Flying Minute in the My Actions section.
2. Click the ellipsis button (...) next to the Flying Minute.



3. Make the edits and press Save.

10.3 Viewing the results

1. Find the closed Flying Minute in the Flying Minute tab.
2. Click on the title of the Flying Minute to see the results. This includes the votes and who voted for what options (unless the poll is set to anonymous). Attached documents are also listed.

Miles Project Budget Decision Closed

Please see the attached files for background to the project, using this to make a decision as to how much budget we should all...

Voting Results

2 Votes (\$35k)

- James Di Blasi | E²
- Deklan Heider | E²

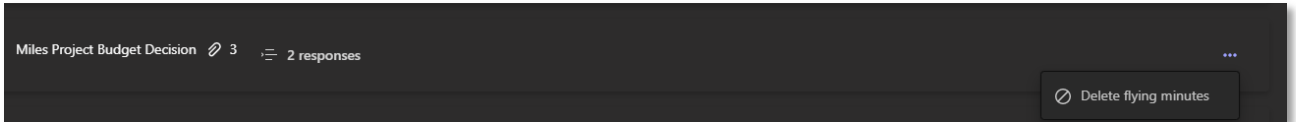
Example Presentation.pptx
 Invoice Template.docx
 Sample Employee Business Expense Policy.docx

Cancel

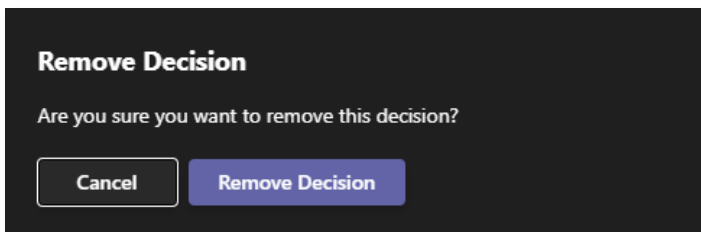
10.4 Deleting a Flying Minute

Board Administrators can delete any Flying Minute;

1. From My Actions, find the Flying Minute for removal.
2. Click the ellipsis button (...) on the right of the Flying Minute.



3. Select Delete flying minutes.
4. Select Remove decision.

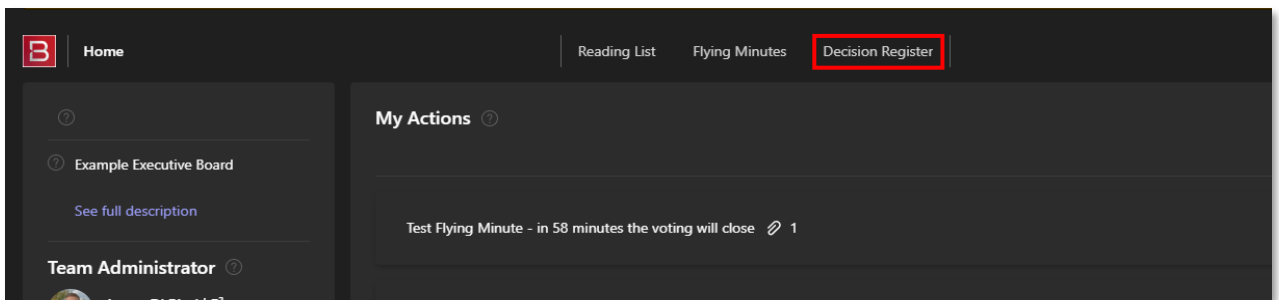


11 Decision Register

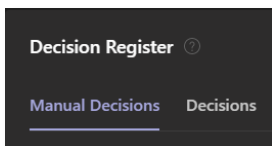
The Decision Register contains all the decisions that have been made or are to be made in the board. These decisions can be viewed in greater detail to see how the decision was made, resources around the decision, as well as the time the decision was made or to be made if it is in the future. Decisions are automatically made by Flying Minutes, or can be manually created by making a manual decision.

11.1 Viewing decisions

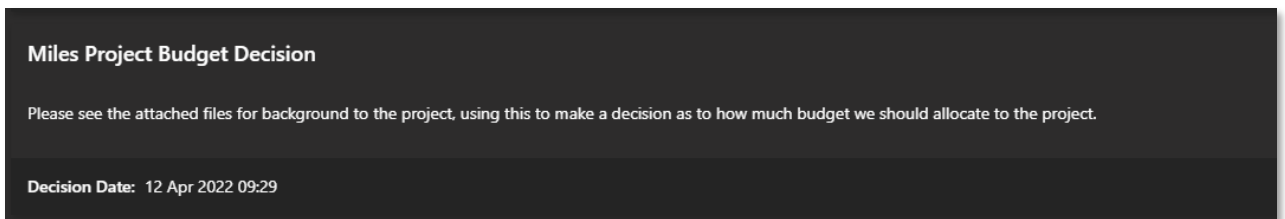
1. Navigate to the Decision Register tab.



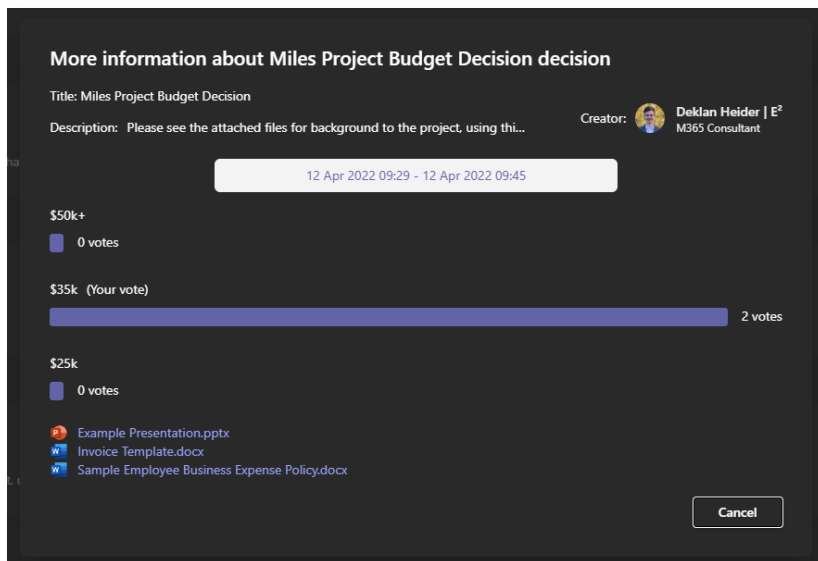
2. Select Manual Decision for decisions that were not made using a poll or Flying Minute, select Decisions for all other decisions.



3. Find the decision for review.

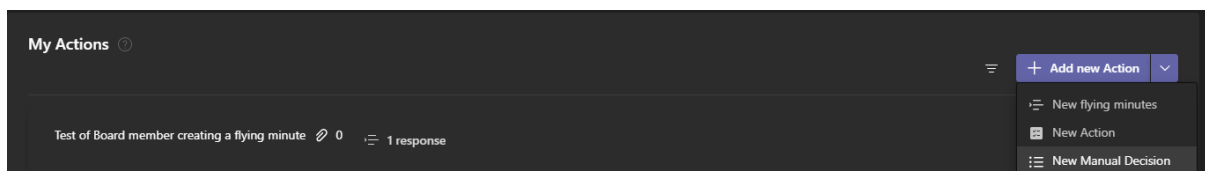


- Click on the title of the decision to view its details and documents. There will also find a breakdown of the votes for the decision (if there was a poll) and the documents associated with this decision will be listed.

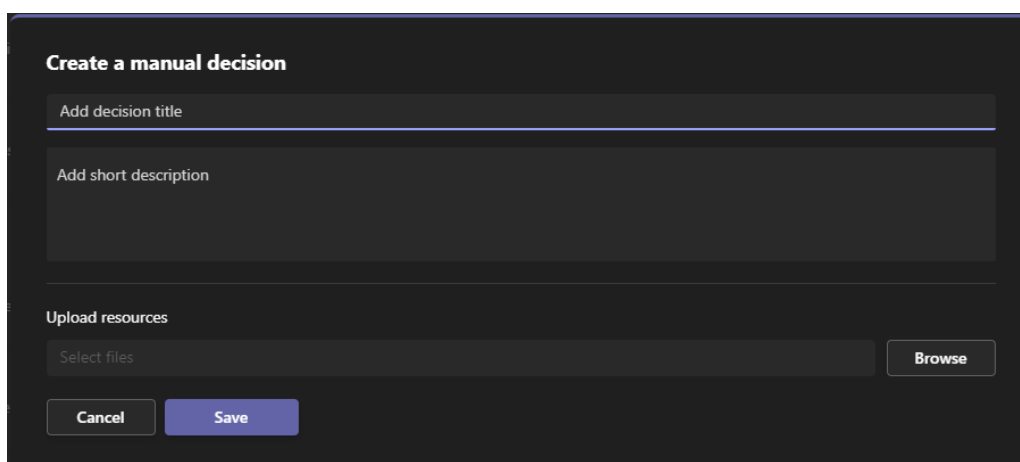


11.2 Creating a manual decision

- From the landing page, click on My Actions.
- Click on the dropdown and click New Manual Decision.



- Add detail and related documents to the decision.

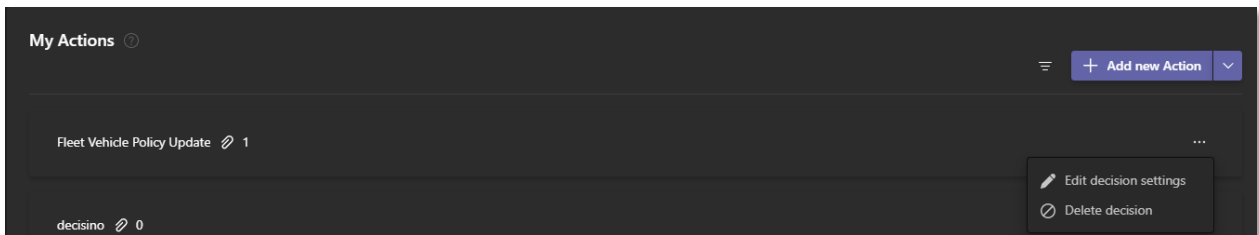


- Click Save.

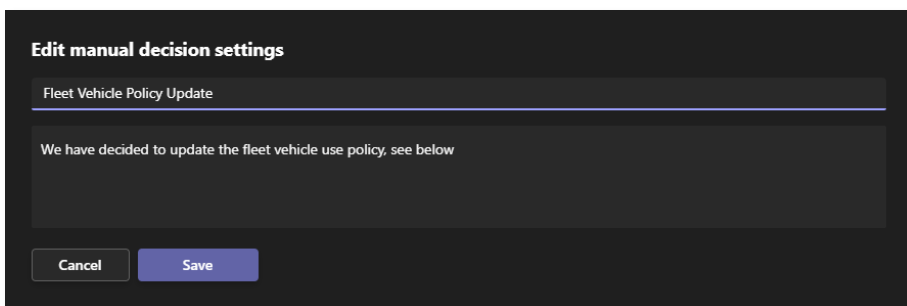
11.3 Editing a manual decision

Only authors of Manual Decisions can edit them.

1. From the landing page, find the manual decision in the My Actions section (Use the Filter if needed).
2. Select the ellipsis button (...) next to the manual decision.
3. Select Edit decision settings.



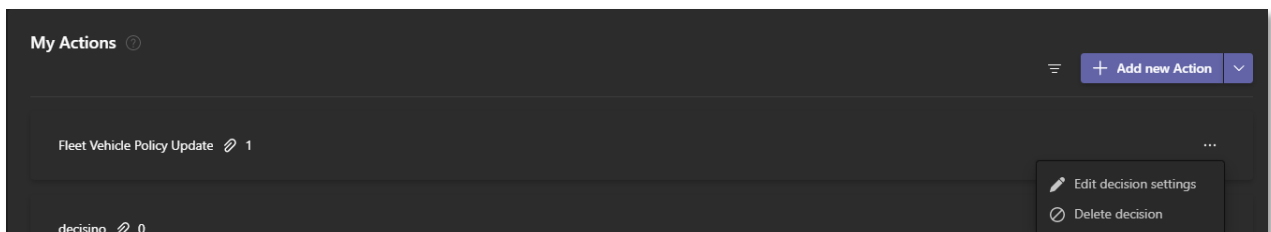
4. Make any changes required, then select Save.



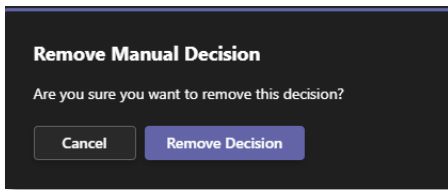
11.4 Deleting a manual decision

Board Administrators can delete any manual decision.

1. From the landing page, find the manual decision in the My Actions section (Use the Filter if needed).
2. Select the ellipsis button (...) next to the manual decision.
3. Select Delete decision.

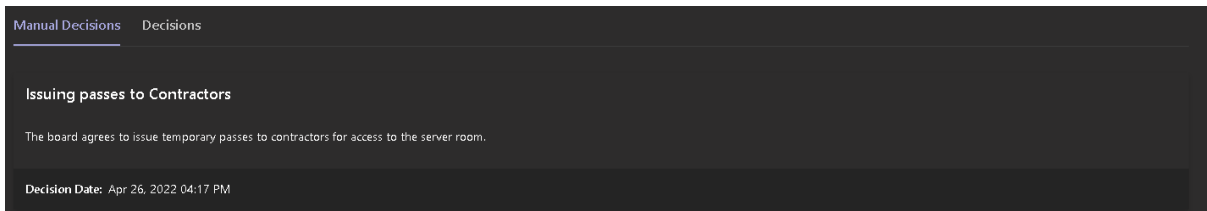


4. Select Remove Decision.

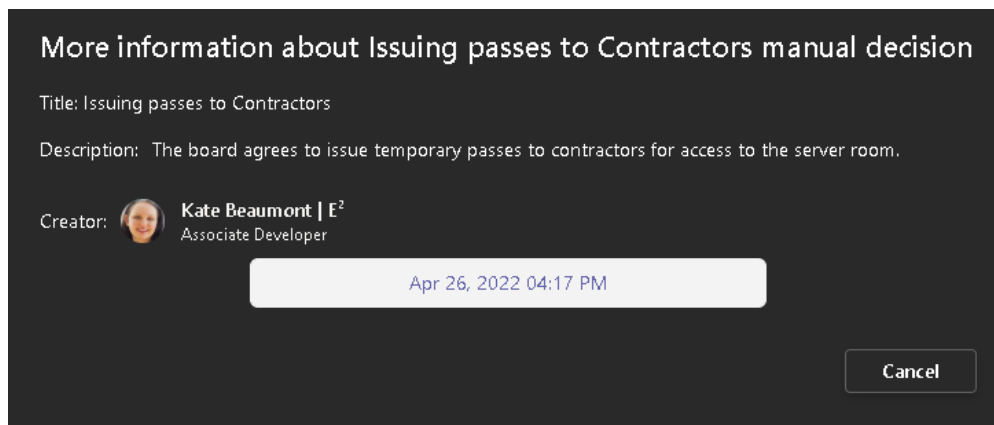


11.5 Viewing a manual decision

1. From the landing page, find the manual decision in the My Actions section (Use the Filter if needed).
2. To view the decision, select on the title of the relevant manual decision.



3. A window will display, displaying further information including who created the decision.

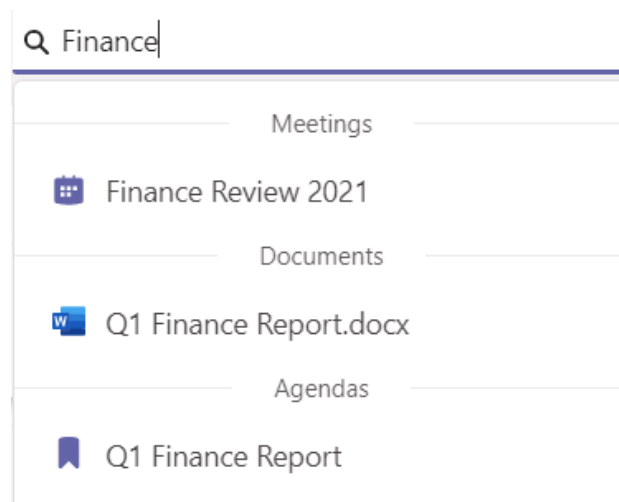


12 Searching

Searching is an integral part of any good software. Board Connect provides an easy way to search for meetings, agenda items and documents that are contained within each of the board instances.

To search for a meeting, document, or agenda item in Board Connect;

1. Open any Board Connect page.
2. Locate the search box in the top right of the window.
3. Begin typing the search term. The instant search drop-down will show any matching items, categorised into sections for meetings, documents and agenda items.



4. Click on an item to open it.

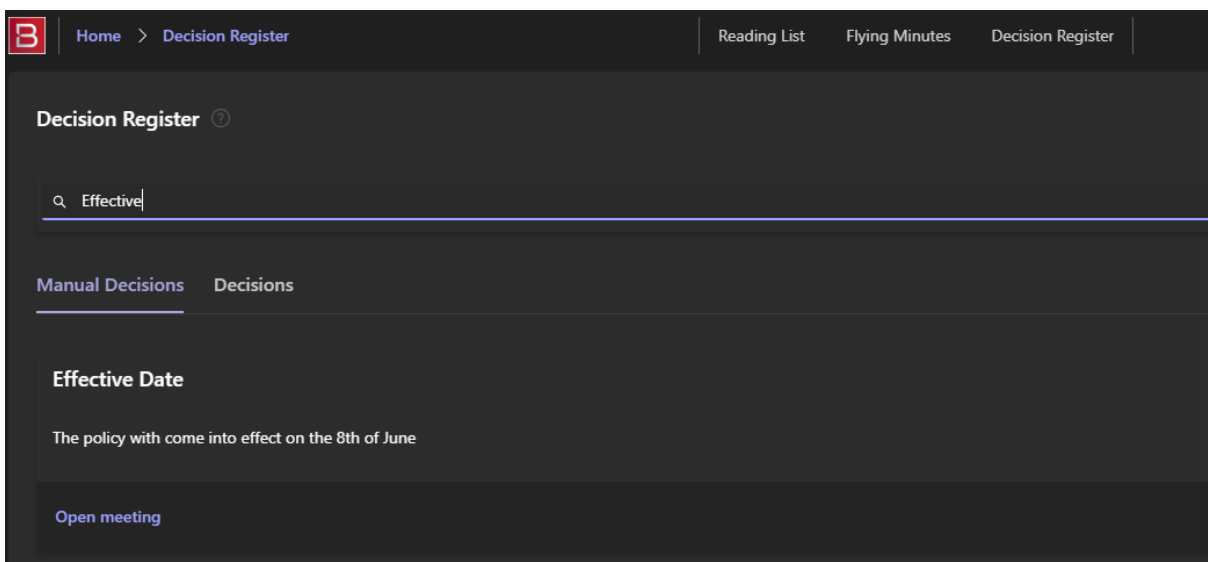
12.1 Page-Specific Search

Aside from the standard search, there are also 3 more searches all of which apply only to one page each, with the Reading List, Flying Minutes, and Decision Register. These search bars only return results from the relative page they are sitting on.

1. Navigate to any of these pages from the top navigation pane.



2. At the top of the page, locate the search bar.
3. Begin typing a search term. The list of search results will dynamically update as you type



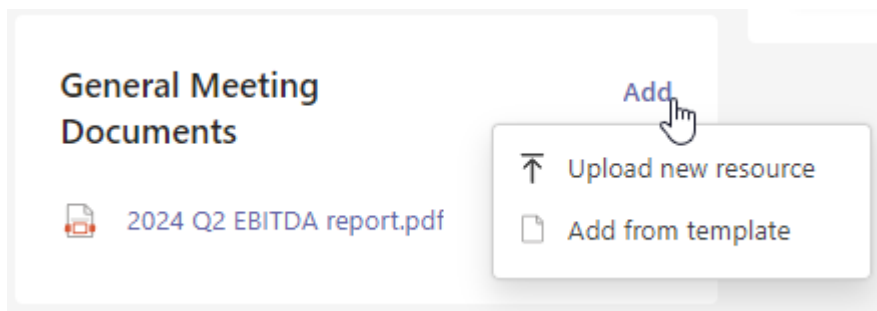
13 General Meeting resources

The meeting resources section is where all the relevant and/or formalised documents for the upcoming board meeting will be stored.

There are two ways to upload documents to the meeting's resources:

1. Upload via Board Connect

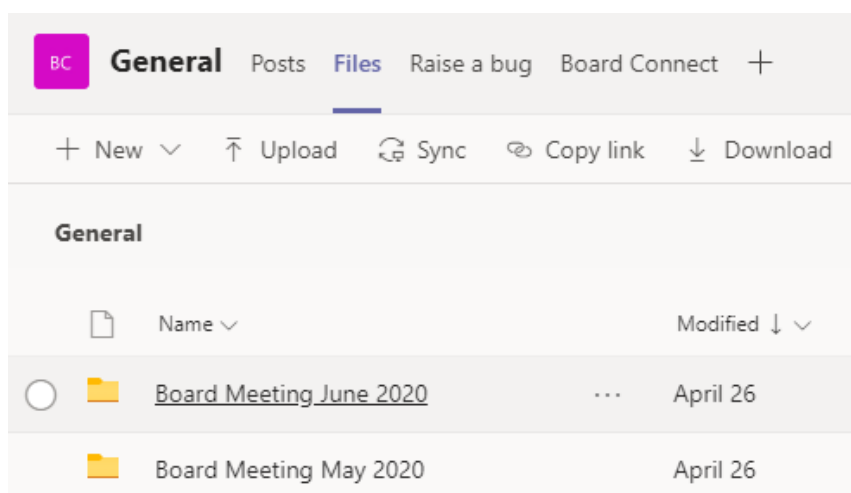
Upload a document by either using the 'Add' > 'Upload new resource' function within the selected meeting. This is the standard and expected way recommend to upload general meeting resources to a meeting.



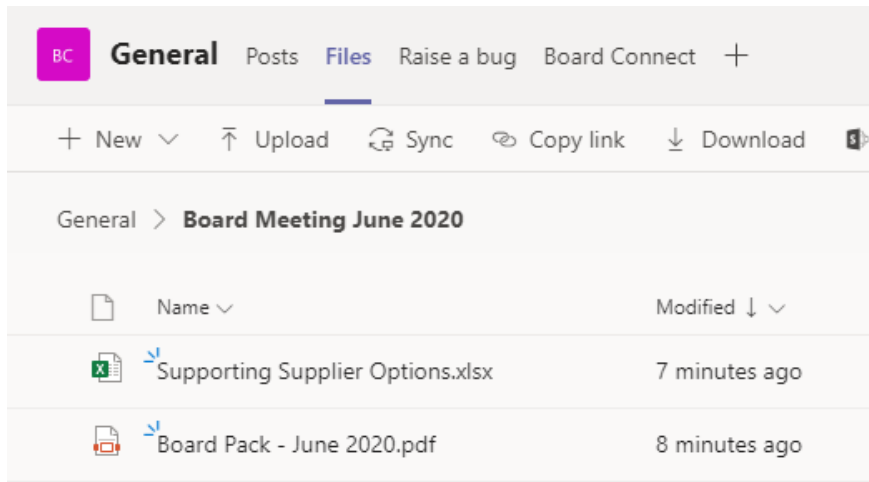
2. Upload via teams

The second way to upload a document is to use native Microsoft Teams functionality, located in the Files tab.

To upload files via the MS Team's 'Files' tab, navigate to the corresponding meeting folder within the file library.



Documents can be dragged and dropped into the Meeting folder or uploaded using the 'Upload' button in the toolbar.




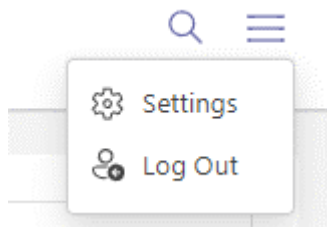
14 Templates

Ensuring the information is prepared in the correct document format is important, as it ensures accuracy and saves time when compiling information for formal meeting documents. Storing templates enables members to start creating artefacts in the required format from the outset.

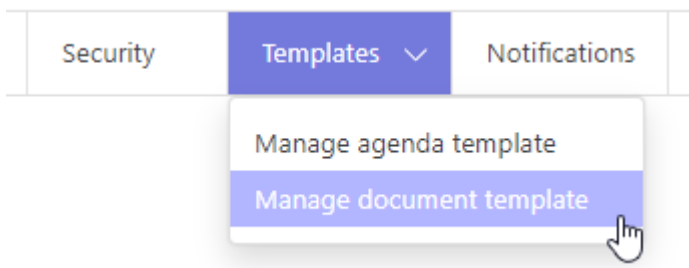
14.1 To add a Document template

Note: Only Team Owners or Board Administrators can upload templates.

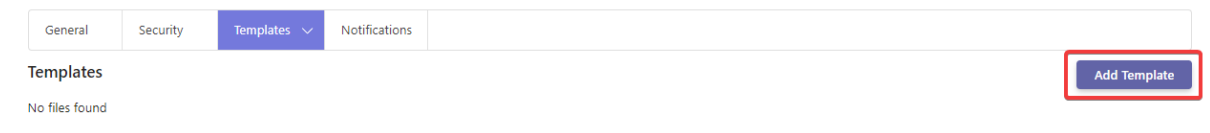
1. From the 'Board Connect' tab, click the 'Settings cog' () to go to the Board Connect Configuration screen



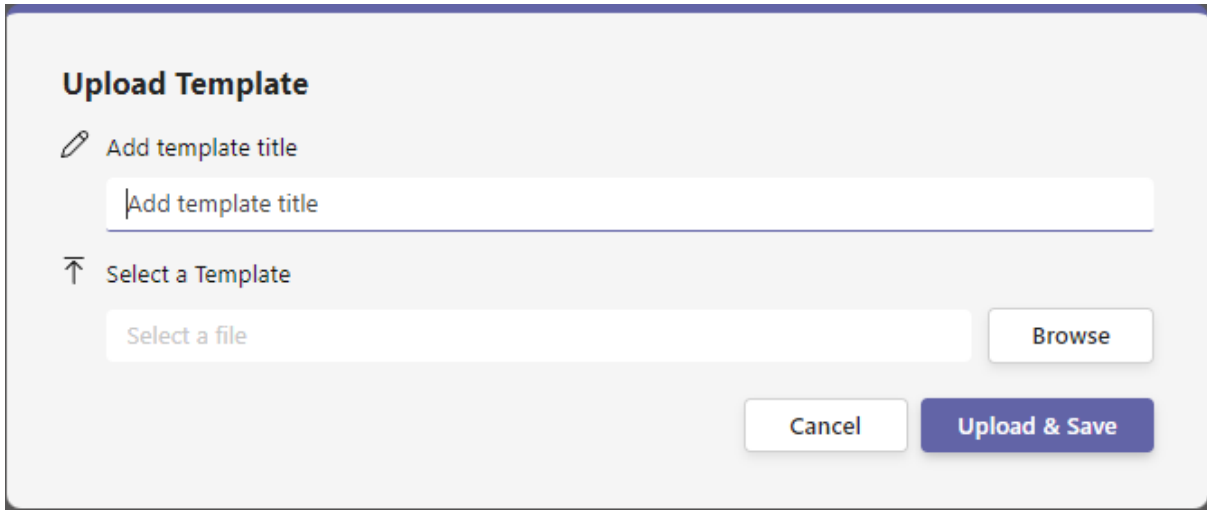
2. Select the Templates > Manage Document Template navigation item



3. The uploaded templates (if any) will be displayed at the bottom of the page.
4. To add new templates, click 'Add Template' on the right-hand side of the page



5. Provide a title for the template, then upload a template from OneDrive or PC by clicking the empty field or clicking the Browse button, then click Upload & Save.

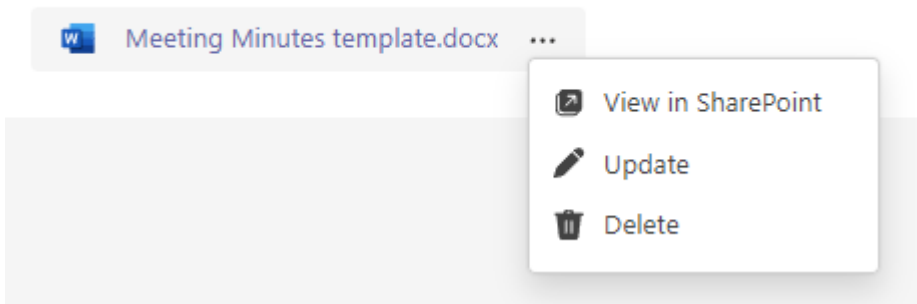


The screenshot shows a dialog box titled "Upload Template". It contains a text input field with a pencil icon and the placeholder text "Add template title". Below this is another text input field with the placeholder text "Select a file" and a "Browse" button to its right. At the bottom of the dialog, there are two buttons: "Cancel" and "Upload & Save".

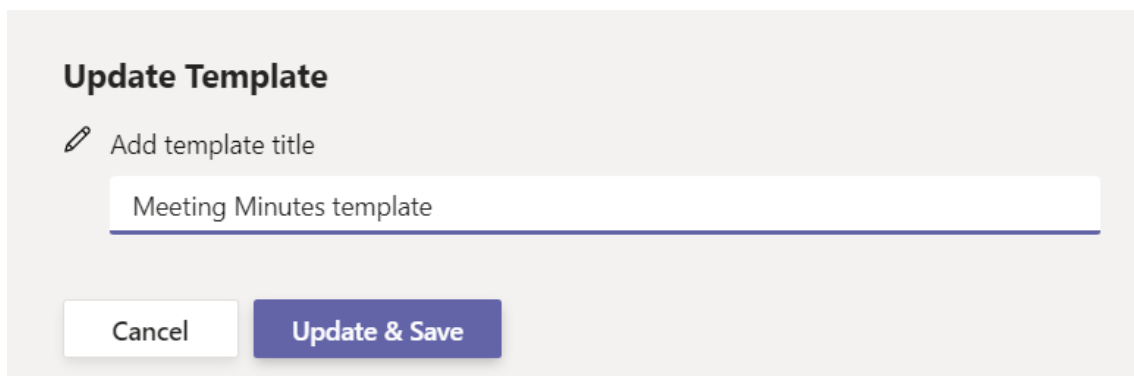
14.2 Edit a template name

1. Click the ellipsis button (...) next to the desired template to update and select Update.

Templates



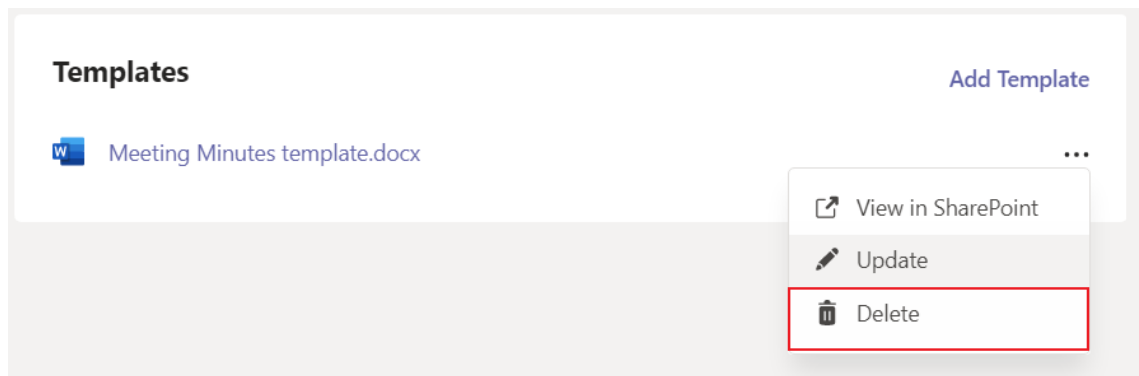
2. Provide a new name for the template, then click Update & Save.



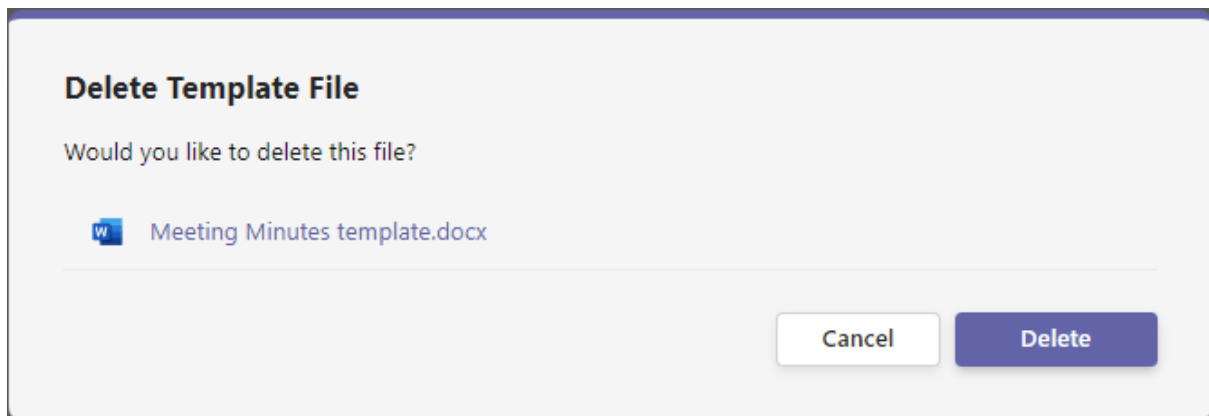
The screenshot shows a dialog box titled "Update Template". It contains a text input field with a pencil icon and the placeholder text "Add template title". The input field contains the text "Meeting Minutes template". At the bottom of the dialog, there are two buttons: "Cancel" and "Update & Save".

14.3 Delete a template

1. Click the ellipsis button (...) next to the template to be removed and select Delete.

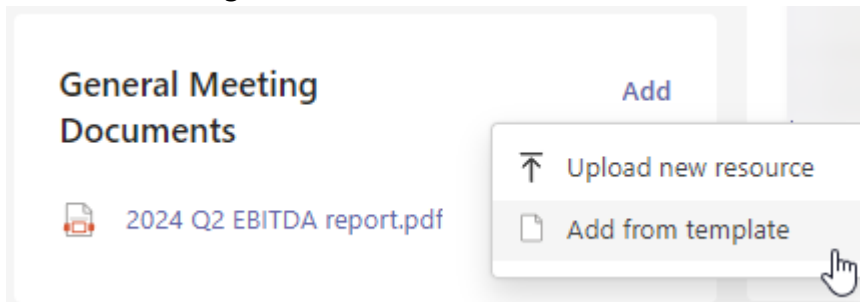


2. Click Delete to confirm deletion.

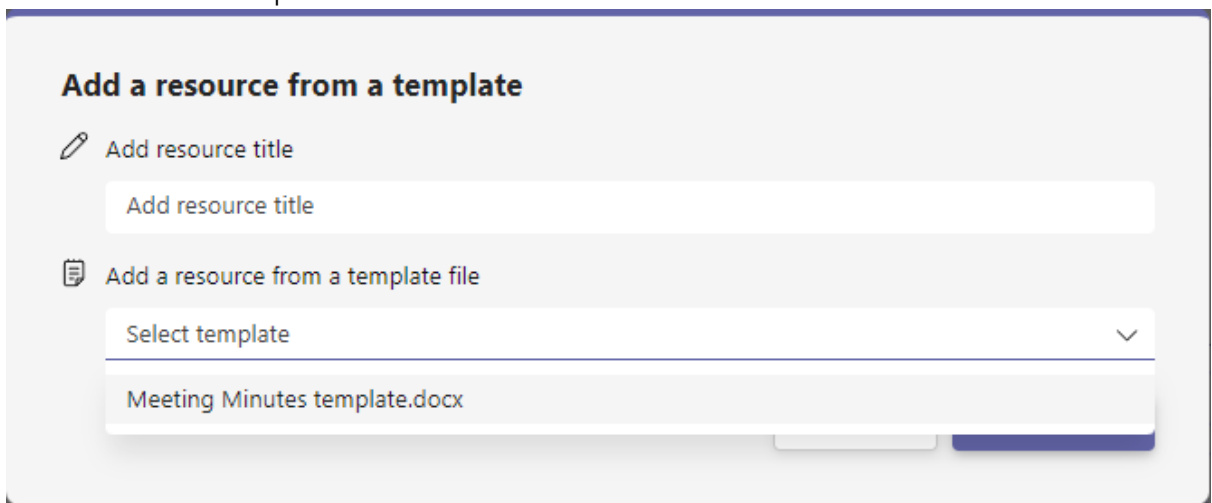


14.4 Add a template document to a meeting

1. Click Add from template to begin the process of adding a template to a selected meeting.



2. Click Add from template.



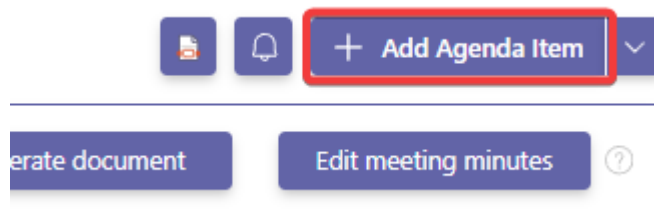
3. Select the desired template from the drop-down menu.
4. Click Save.

15 Agendas

Creating agendas for a meeting is a tool that can be used to indicate what will be discussed and what needs to be done in preparation for the upcoming meeting. Colleagues can view meeting agendas to see who is responsible for them and any resources related to the agenda.

15.1 Create an Agenda item

1. Within the Agenda panel of a meeting, click the Add Agenda Item button, loading the new agenda item form.



2. When creating a new agenda, the following are mandatory fields:
 - Title
 - Agenda owner
 - Notes

Optionally, when creating the agenda item, a time allocation on the agenda can be entered which signifies how long the agenda owner plans to speak / discuss this agenda item.

Additionally, when creating agenda items, pre-uploaded resources / templates to the meeting can be associated to the agenda item being created at that time, but also can be updated subsequently if required.

Add new agenda item

Add agenda title

Select the agenda owner from a list of people who are invited to the meeting

Notes on this agenda

Input time allocation min ▼

Add resources for agenda ▼

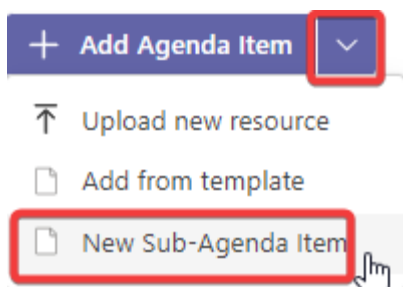
Cancel Save

3. Click Save when done

15.2 Create a Sub-Agenda item

A sub agenda item lets you see your board papers and agenda items in a layered way, e.g. 1.1, 1.2, 1.3 etc.

1. To create a sub-agenda item. Click the New Sub agenda-Item as shown below.



2. Fill out the sub-agenda title, select the parent item of the sub-agenda, which are required; and add the sub-agenda notes.

Create sub-agenda item

Sub-agenda item title

Assigned agenda item Associate your item to an agenda

Sub-agenda notes

Add a document (optional)

Select an existing meeting document

Cancel Create

- To add a document, tick the checkbox, and select the document to include

Add a document (optional)

Select an existing meeting document

Meeting minutes.docx

- Click Create.

15.3 Edit an Agenda Item

- Click the ellipsis button (...) and click Edit agenda item.

10:00 AM - 10:15 AM 1. Introduction ... Speaker: James Di Blasi | E² CTO

Edit agenda item

Delete agenda item

- Enter any changes to the Agenda details and click Save.

Edit agenda

Introduction

James Di Blasi | E² ×

Introduction to the meeting

15 min

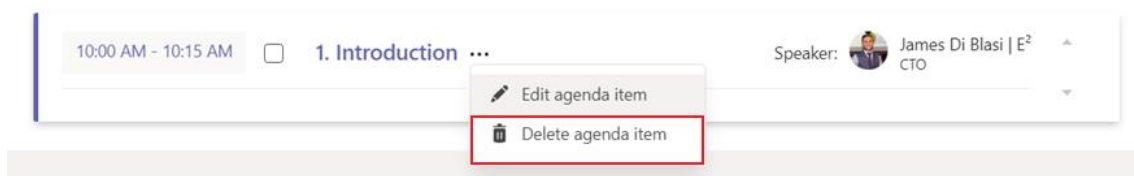
Add resources for agenda

Cancel Save

15.4 Delete an Agenda Item

To delete an Agenda item within a meeting;

1. From the agenda item to be removed, click the ellipsis button (...) and click Delete agenda item.



2. A confirmation dialog will appear. Click Remove Agenda to confirm removal.

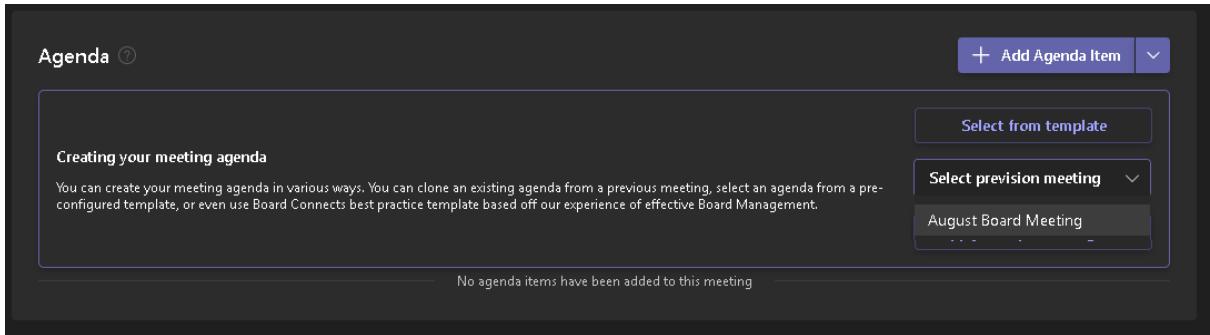
Remove Agenda

Are you sure you want to remove this agenda from the meeting?

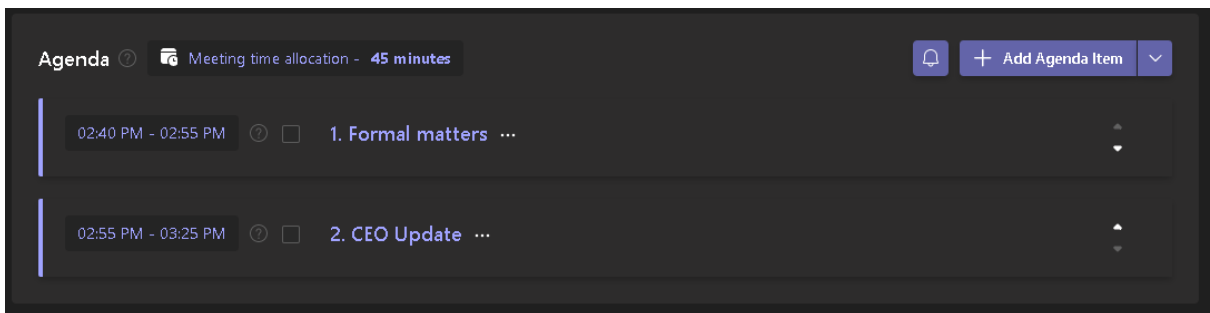
Cancel Remove Agenda

15.5 Clone an Agenda Item from a previous meeting

1. To clone all the items on an agenda from a previous meeting, once the meeting is set up, in the Creating your Meeting Agenda pane, click Select Previous meeting. Click on the desired agenda.

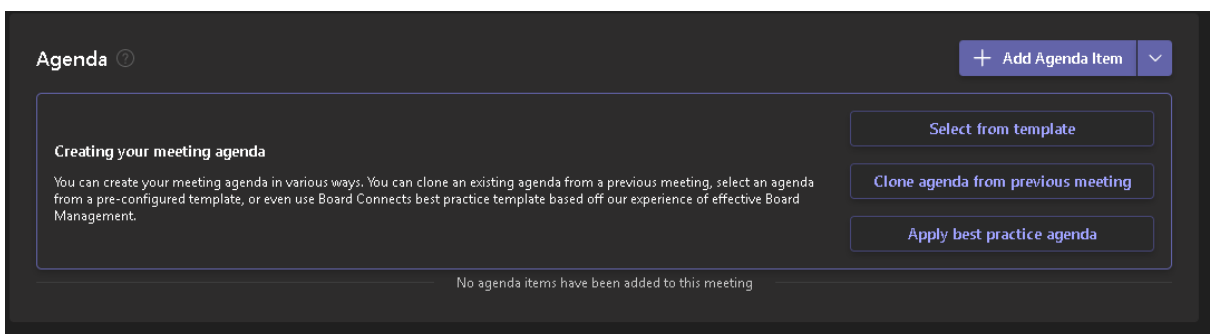


2. The previous agenda will be cloned into the current meeting. The cloned agenda can be edited if desired and editing will not amend the previous meetings' agenda.



15.6 Apply the Best Practice Agenda

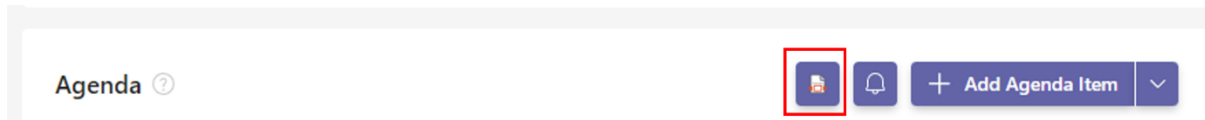
1. To apply the 'Best Practice' agenda to the current meeting, within the Agenda pane click Apply Best Practice Agenda.



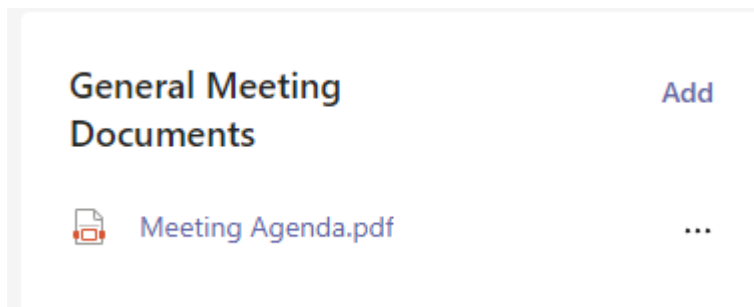
15.7 Combine your agenda into a PDF

If you have prepared your agenda in Board Connect and wish to send it via email, you may choose to convert it to a PDF format. To accomplish this, kindly adhere to the following guidelines from the meeting page:

1. From the Agenda panel, click the PDF icon.



2. This will generate the Agenda into a PDF located in the General Meeting Documents section

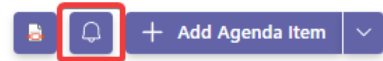


15.8 Notify Board Members that a Meeting Agenda is ready

An option to have the ability to send an email notification to board members that a meeting agenda is ready has been built in, however it needs to be first enabled in the Settings Configuration panel. Please see section Notifications for instructions.

1. Select a meeting and create your meeting agenda as required.
2. Once your meeting has been generated, click on the bell icon to bring up the agenda notification window

Meeting Agenda ⓘ



Meeting minutes



Generate document

Edit meeting minutes



1. Agenda Item 2 ...

test Agenda Item 2

3. In the Agenda notification window, fill text for the body of the message. Select whether you want a separate PDF to be generated & attached to the email notification. If you select this option, the Agenda will still appear in the body of the email. Select the intended recipients.

Agenda notification

Enter the message text to send a notification to users

Vladislav Mihasev | E² Vu Dang | E²

Select all

Cancel Send

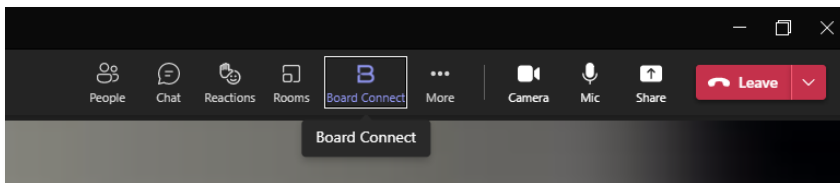
4. Click Send when done.

16 Meeting Minutes

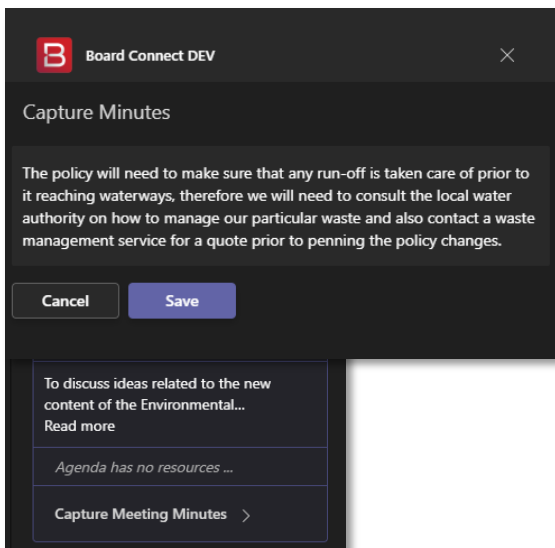
Meeting Minutes are notes that are attached to agenda items that are taken during a meeting. Only one can be attached to an agenda item. Minutes can be edited and deleted after the meeting has concluded up to when the meeting is closed by the meeting organiser.

16.1 Managing meeting minutes from within the call

16.1.1 Creating a Meeting Minute from within the call



1. Select the Board Connect app from the top bar while in a meeting.
2. In the sidebar, expand the Agenda tab.
3. Select the desired agenda item and select Capture Meeting Minutes.
4. Write the notes on the discussion about the agenda item and click Save.

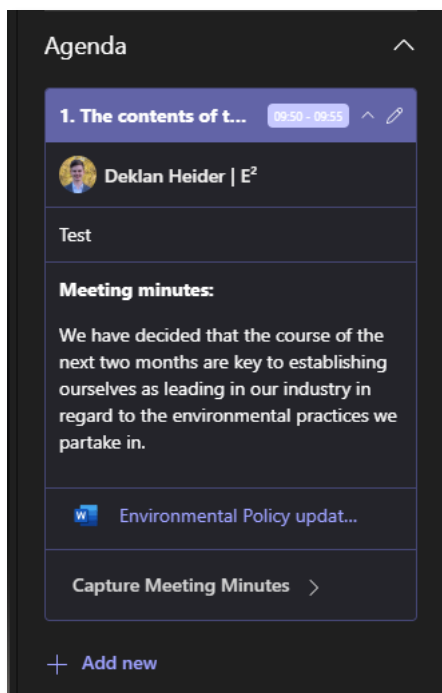


16.1.2 Editing a Meeting Minute during a meeting

A Meeting Minute previously made against an agenda item during the meeting can be edited, including after the meeting has ended.

To modify the meeting minutes during the meeting;

1. Navigate to the agenda item with the Meeting Minute for editing and click Capture Meeting Minutes.
2. Make any required edits and click Save.

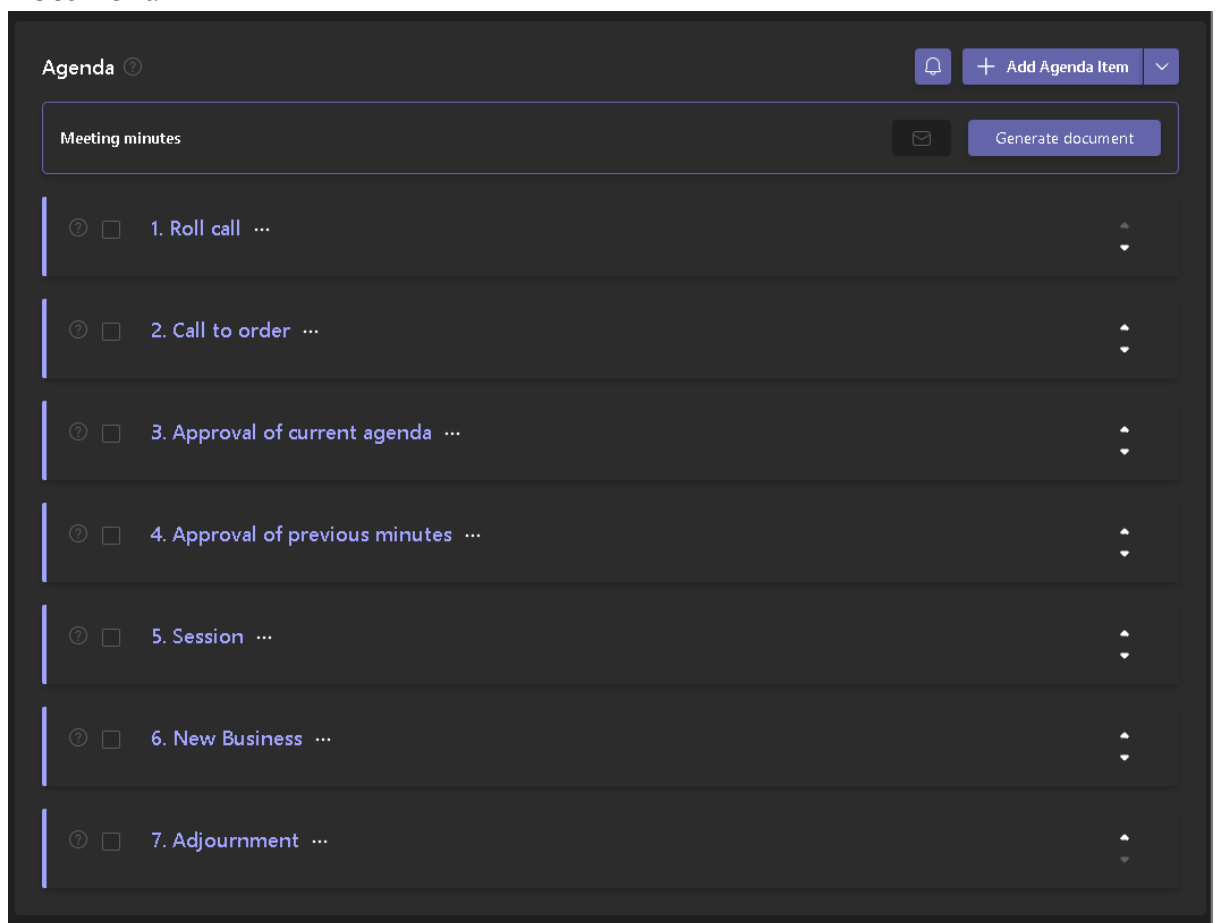


16.2 Collate meeting notes

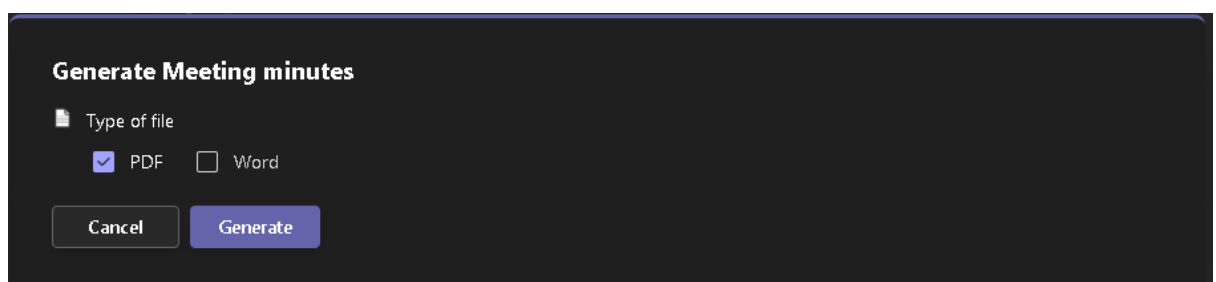
Notes collation into minutes allows organisations to save all the notes that were taken against a meeting. The notes are collated into single file, saved, and recorded against the meeting.

Note: a collated notes document can only be generated prior to a meeting being closed by the meeting organiser.

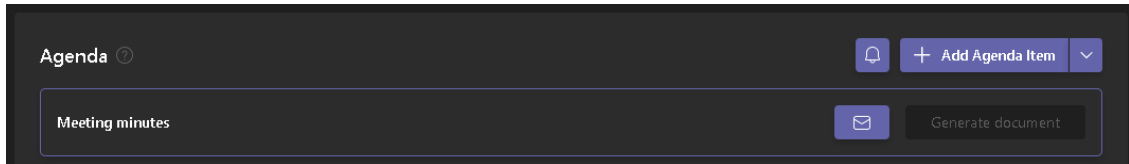
1. In the meeting view pane, under the Agenda section click Generate Document.



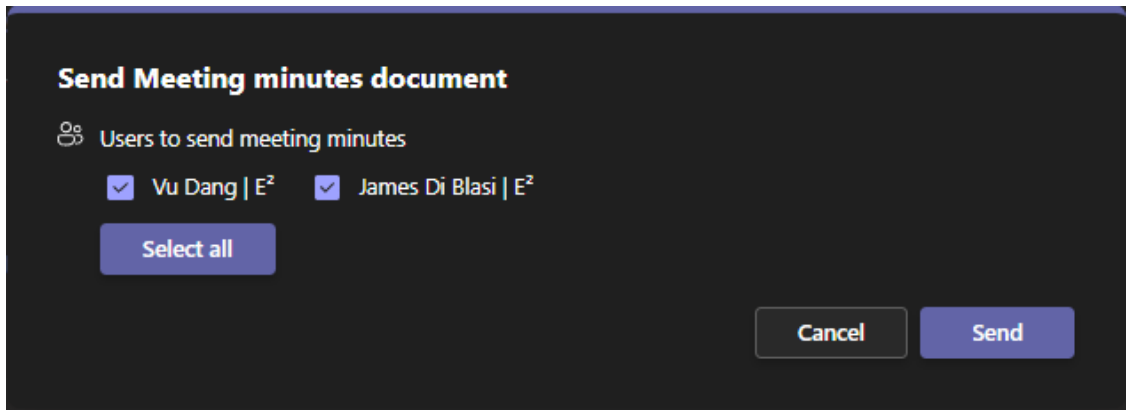
2. In the Generate Meeting Minutes window, select either a PDF document or Word Document, and click Generate.



3. When the minutes are generated, a green alert will appear in the top right, indicating that the minutes are ready.
4. Once the minutes are generated, they can be viewed or emailed and the email button will become available. Click on the email button to email a copy of generated minutes to users.



5. Select the users to send a copy of the generated minutes, and click send.



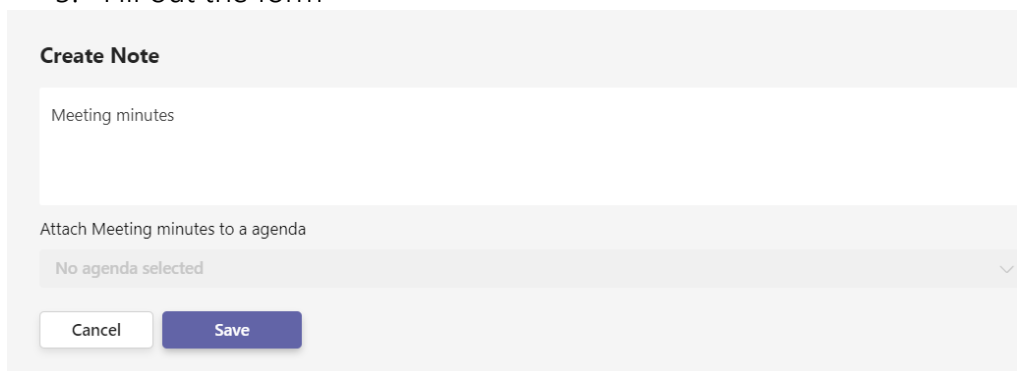
17 Meeting Minutes Editor

The Meeting Minutes Editor allows adding a new item (Meeting Minutes, manual decisions, and actions) to an agenda, edit existing items and delete them all from the same place.

17.1.1 Adding minutes to a meeting

You can record minutes from the 'Edit meeting minutes' page by:

1. Browse to the meeting minute editor
2. Clicking Add Note
3. Fill out the form

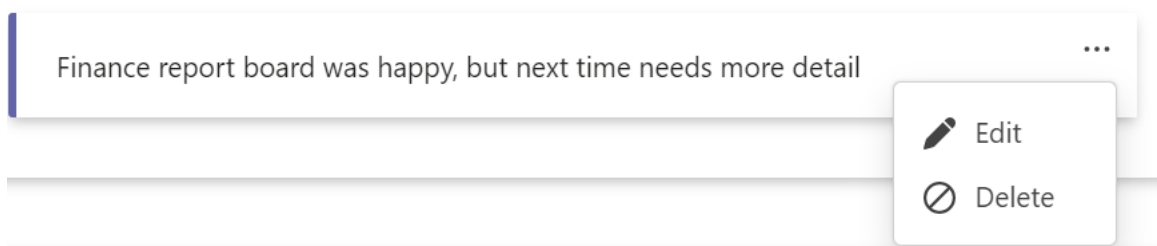


The screenshot shows a 'Create Note' form. At the top, there is a text input field containing the text 'Meeting minutes'. Below this field is a section titled 'Attach Meeting minutes to a agenda' with a dropdown menu currently showing 'No agenda selected'. At the bottom of the form, there are two buttons: a 'Cancel' button and a 'Save' button.

17.1.2 Editing minutes of a meeting

1. Browse to the meeting minute editor
2. Select the Minute you would like to edit and click the ellipsis (...) on the right-hand side.
3. Click Edit

Meeting minutes:

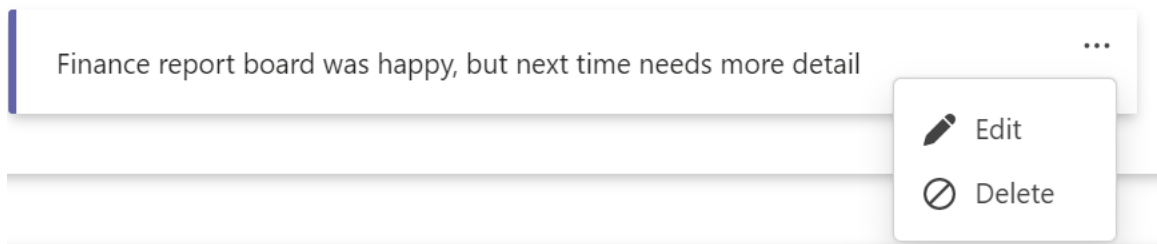


4. Save your changes.

17.1.3 Deleting a minute (note)

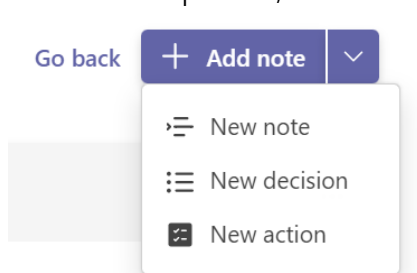
1. Browse to the meeting minute editor
2. Select the minute (note) you would like to remove
3. Click Delete

Meeting minutes:



17.1.4 Adding a new decision

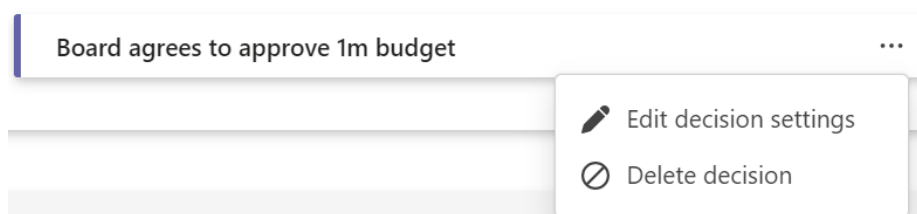
1. Browse to the meeting minute editor
2. Click the dropdown, and select Add new decision



3. Fill out the form (these are the same steps [listed here](#)).

17.1.5 Editing a decision

1. Browse to the meeting minute editor
2. Select the decision you would like to edit
3. Click Edit decision settings

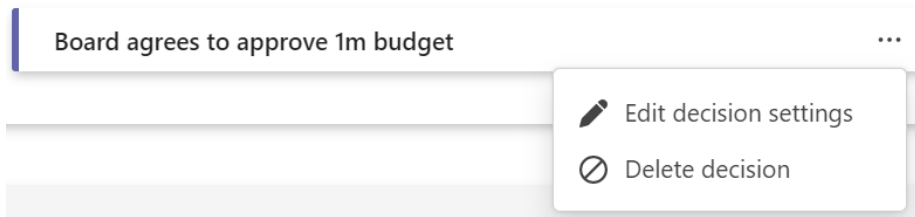


4. Update your decision, and click Save

17.1.6 Deleting a decision

4. Browse to the meeting minute editor

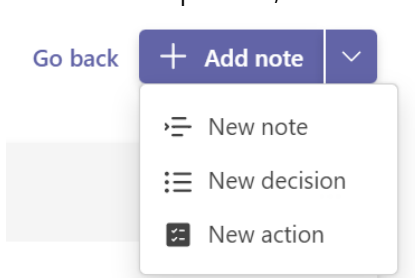
5. Select the decision you would like to remove
6. Click Edit decision settings



7. Update your decision, and click Save

17.1.7 Adding an action

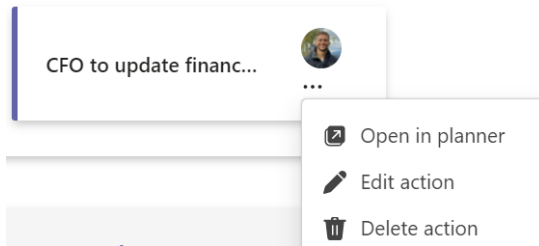
1. Browse to the meeting minute editor
2. Click the dropdown, and select Add new action



3. Fill out the action form and click Save

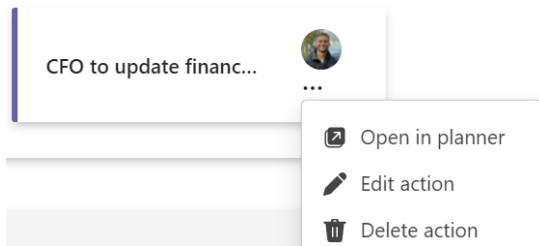
17.1.8 Edit action

1. Browse to the meeting minute editor
2. Select the action you would like to edit
3. Click the dropdown, and click Edit action



17.1.9 Delete action

4. Browse to the meeting minute editor
5. Select the action you would like to delete
6. Click the dropdown, and click Delete action



18 Board Configuration Settings

The Board Configuration settings provides access to all owners of the Microsoft Team and users who have been set as the Board Administrator role within Board Connect to control permissions and settings of Board Connect.

To access the Board Configuration page, or change any of the board setting options the user must be one of the following:

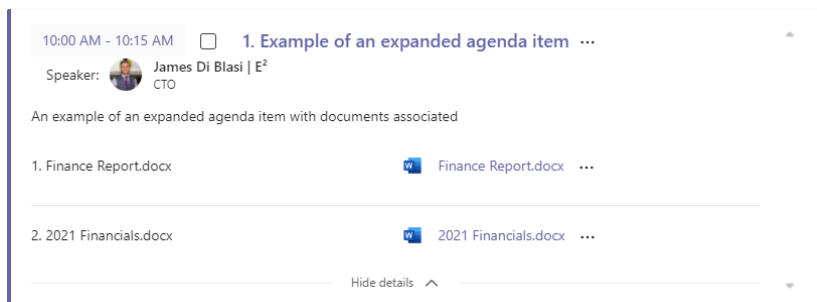
1. User is logged on as an owner of the Microsoft Team
2. User is set as the Board Administrator

18.1 General tab

18.1.1 Hide resources


Turning on the hide resources function requires users to click the expanding section to see document resources within an agenda item. By default, each agenda is pre-expanded.

Pre-expanded



Not expanded

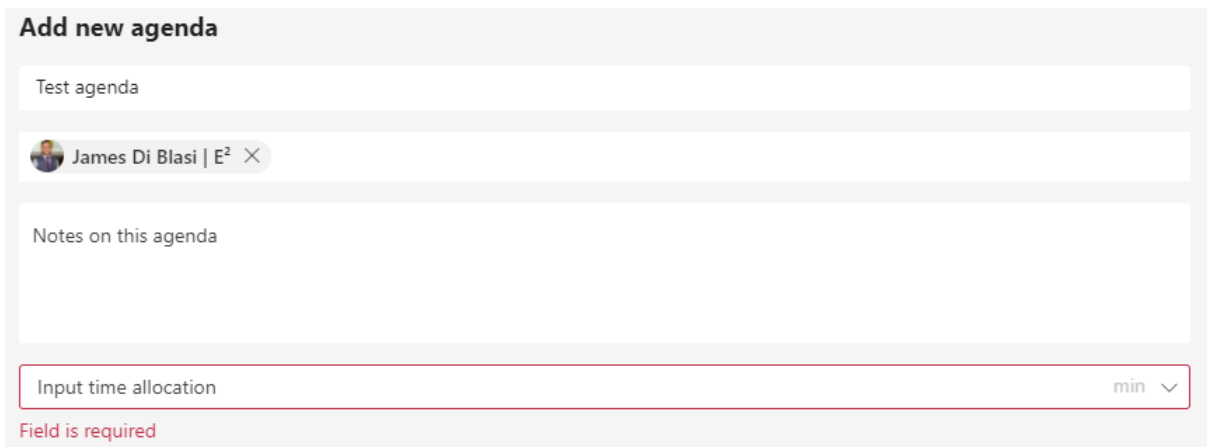


1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the window.
3. Select Board Configuration.

Hide resources Require users to click an expanding section to see document resources associated to each agenda item in the Meeting Agenda panel

18.1.2 Time Allocation field required

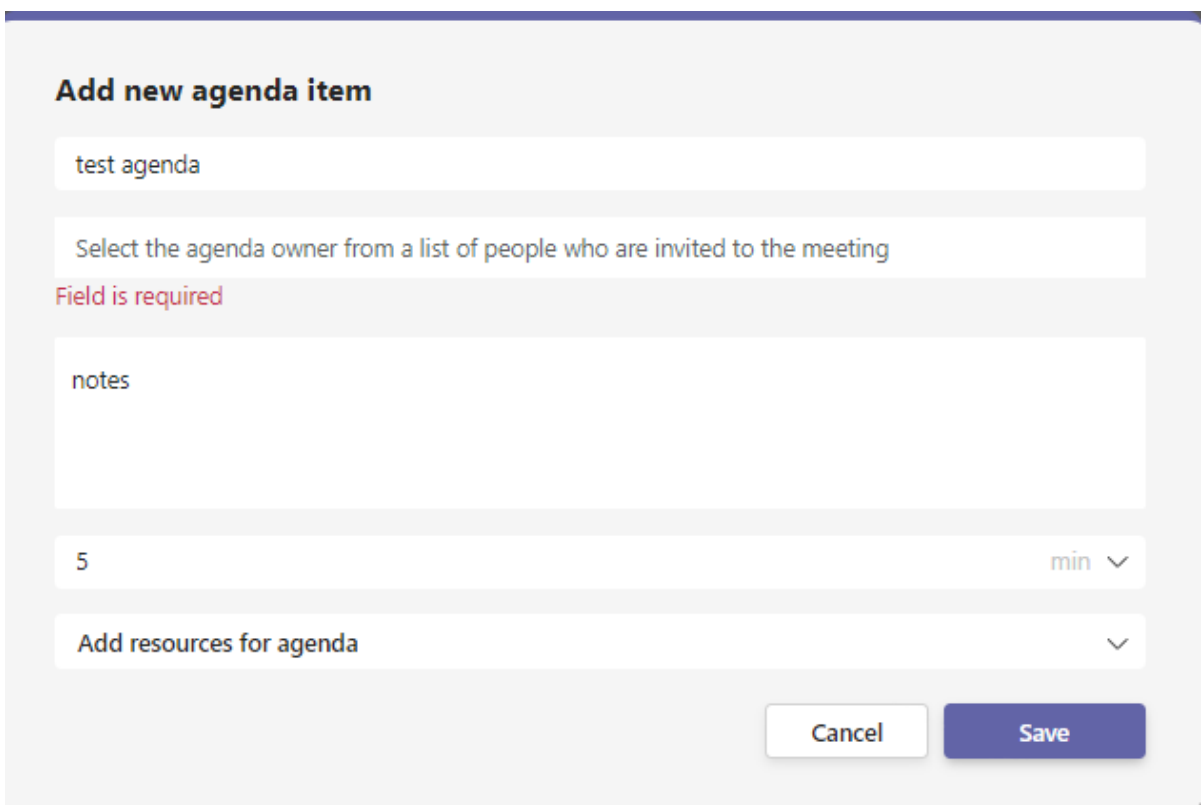
The time allocation required field enforces a time selection when creating an agenda item.



The screenshot shows a form titled "Add new agenda". It contains a text input field with the value "Test agenda". Below it is a user selection field showing a profile picture and the name "James Di Blasi | E²" with a close button. A larger text area is labeled "Notes on this agenda". At the bottom, there is a time allocation field with the text "Input time allocation" and a dropdown menu set to "min". A red error message "Field is required" is displayed below the time allocation field.

18.1.3 Agenda owner field required

The agenda owner required option enforces an owner when creating an agenda item



The screenshot shows a form titled "Add new agenda item". It contains a text input field with the value "test agenda". Below it is a dropdown menu with the text "Select the agenda owner from a list of people who are invited to the meeting". A red error message "Field is required" is displayed below the dropdown menu. Below the error message is a text area with the value "notes". At the bottom, there is a time allocation field with the value "5" and a dropdown menu set to "min". Below the time allocation field is a dropdown menu with the text "Add resources for agenda" and a downward arrow. At the bottom right of the form are two buttons: "Cancel" and "Save".

18.1.4 Opening documents in the browser

Specify whether browser-enabled documents should be opened in the Teams app client or browser by default.


Open behavior for documents

- In browser
- In Teams app

18.1.5 Disable the in-app meeting experience

Disabling the in-app meeting experience stops the Board Connect app from being added to the Microsoft Teams call.

Note: to learn more about teams meeting extensibility, please refer to the following Microsoft article; <https://techcommunity.microsoft.com/t5/public-sector-blog/meetings-extensibility-in-microsoft-teams-meetings/ba-p/2111965>


1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page.
3. Select Board Configuration.
4. Turn on the Disable installing the app into the meeting option.

Turning this option on means that the Board Connect application will no longer be added to meetings created through Board Connect.

Disable the in app meeting experience **Disable installing the app into the meeting**

18.1.6 People picker search limit


For large organisations, there may be a number of staff members with similar names that show within the people picker. Accordingly, there is a setting to restrict how many people can be returned when using the people picker.

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page.
3. Select Board Configuration.
4. In the general tab scroll to the bottom of the page and change the Maximum number of displayed users in the search to the desired number.

Maximum number of displayed users in the search

18.1.7 Checking a Board Connect license

To check the current license of the organisation using of Board Connect;


1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the window.
3. Select Board Configuration.
4. The Type of Licence will display beneath License Tab.

Type of license: Trial


License	Description
Trial	Trial license provides access to all features available on Board Connect.
Standard	Standard Board Connect license offers installation of Board Connect on up to 3 boards.
Premium	Premium Board Connect provides organisations Installation of Board Connect on up to 10 teams.
Enterprise	<p>Board Connect Enterprise is designed for enterprise organisations looking to roll-out Board Connect across an unlimited amount of Boards.</p> <p>The Enterprise version of Board Connect includes all the same functionality as the Premium version, while also including Integration with Adobe Sign & DocuSign as well as providing an SLA backed support agreement.</p>

18.1.8 Setting Board Description

To set the board description displayed on the landing page of Board Connect;

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page.
3. Select Board Configuration.
4. Within the Board description section, of the General tab. Enter the board description and click Save.

Example Executive Board


 Details about the executive board summary
[See full description](#)

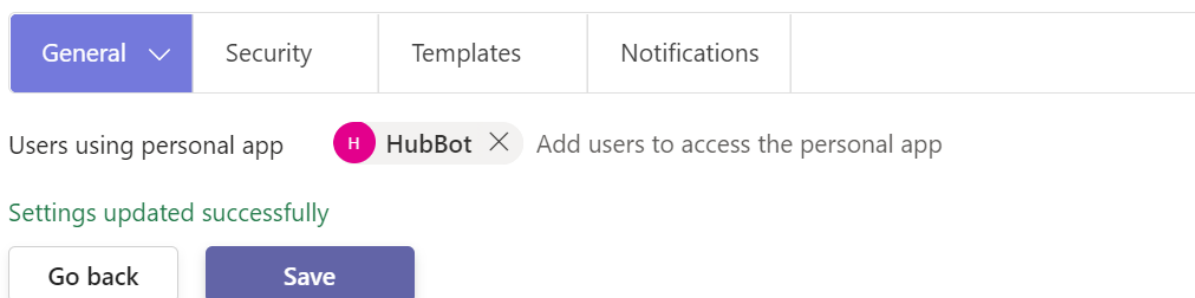
18.1.9 Manage Personal app

Managing the personal app allows the administrator of the board to add the Board Connect personal app bar by default.

The user will still need to prioritise the app if there are more then six apps added to the users personal app bar by default.

The following instructions make Board Connect available to the users personal app bar.

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right-hand side of the page.
3. Select Board Configuration.
4. Select General > Manage your personal app
5. Select any users that you want Board Connect to be added to the personal app bar




The screenshot shows a settings menu with tabs: General (selected), Security, Templates, and Notifications. Below the tabs, it displays 'Users using personal app' with a user card for 'HubBot' (indicated by a red 'H' icon) and an 'Add users to access the personal app' button. A green message states 'Settings updated successfully'. At the bottom, there are 'Go back' and 'Save' buttons.

18.1.10 Disable guest user access

In some scenarios, organisations would like to restrict guest users being able to access the Board Connect application. Should it be desirable to restrict access to Board Connect, it is suggested approaching this from both Board Connect and Microsoft Teams.

To restrict guest user access directly from Board Connect, please follow these steps.


6. Browse to the Board Connect landing page.
7. Click the settings cog () on the right-hand side of the page.
8. Select Board Configuration.
9. Within the general tab of the board configuration page, click the Disable guest users option.

Disable guest users Disable the ability to use the app for guest users

Note: to restrict guest access at the Microsoft Teams level, please consult the relevant IT Administrator about restricting Teams guest access.

18.1.11 Change the 'Flying Minutes' label

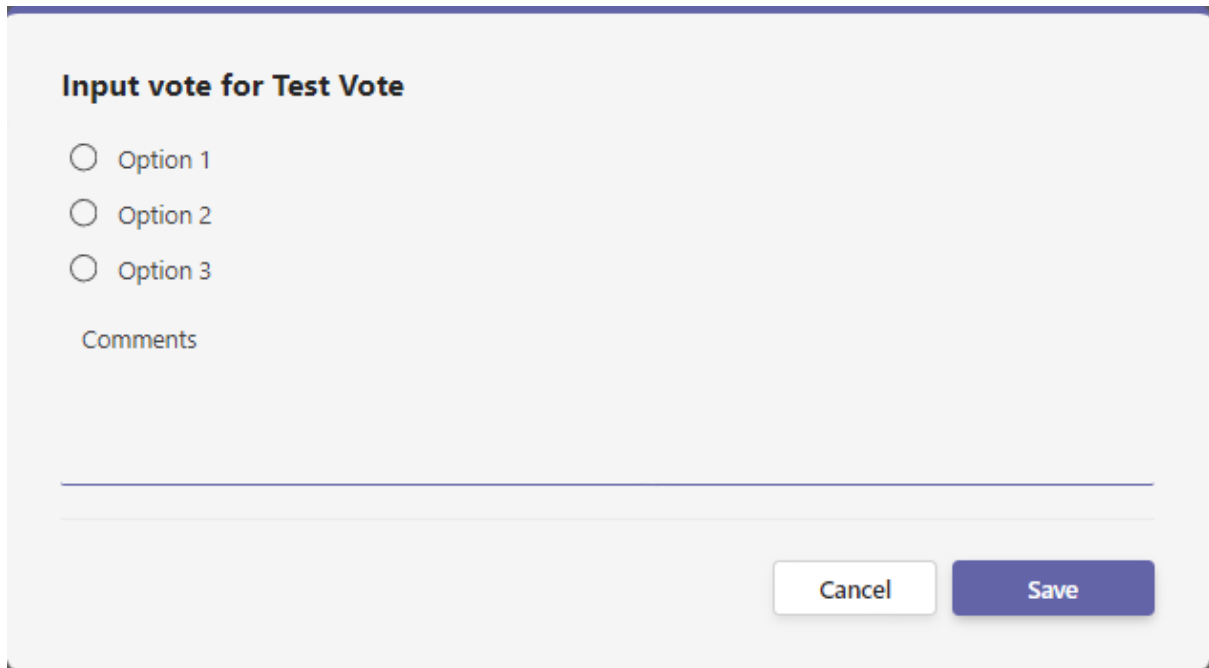
Within Board Connect, 'Flying Minutes' is seen throughout the system. Flying Minutes is also often referred to as 'Circular Resolutions' throughout different geographies. The following steps allow the administrator to change from 'Flying Minute' to 'Circular Resolution' and vice-versa.

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right-hand side of the page.
3. Select Board Configuration.
4. Make your selection of the 'Flying Minutes label'

Flying Minutes label Flying Minutes
 Circular Resolutions

18.1.12 Voting comments

This setting allows for a comment to be captured when a vote is cast.



Input vote for Test Vote

Option 1

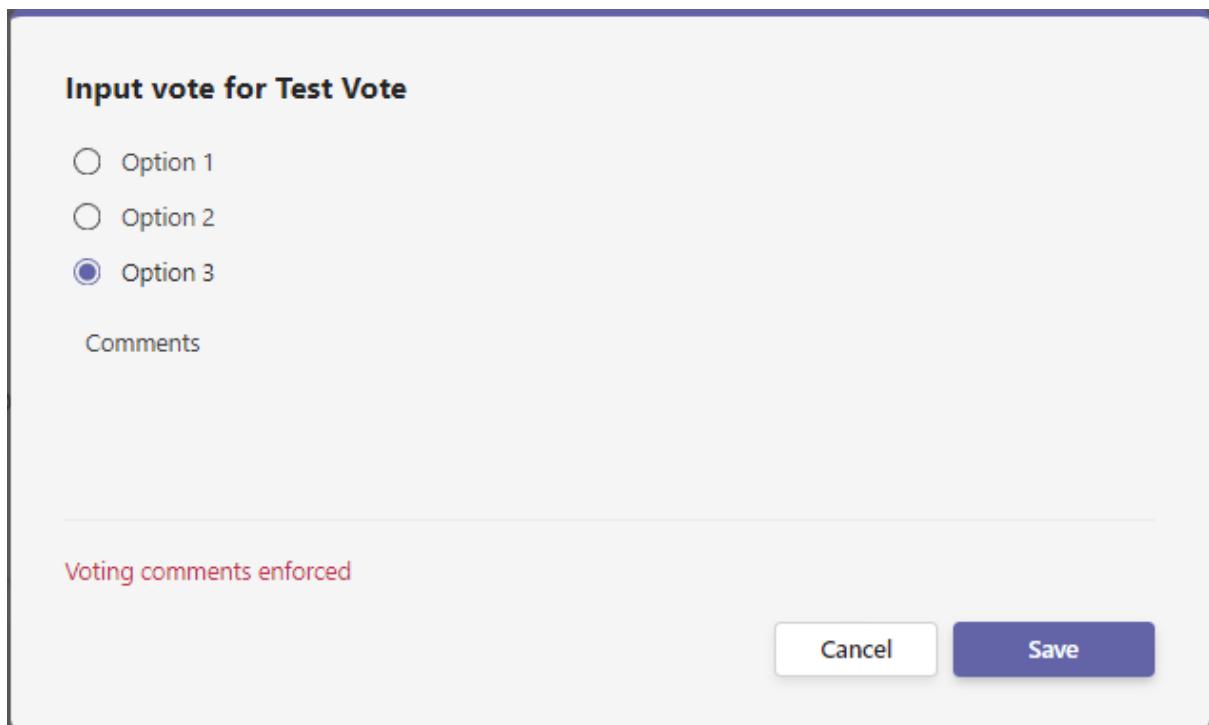
Option 2

Option 3

Comments

18.1.13 Enforced voting comments

This setting enforces a comment to be left when a vote is cast.



Input vote for Test Vote

Option 1

Option 2

Option 3

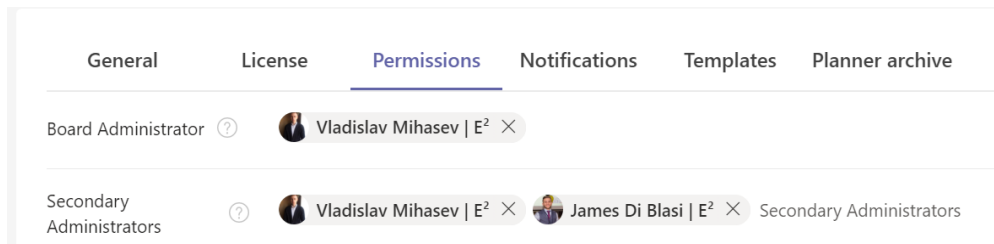
Comments

Voting comments enforced

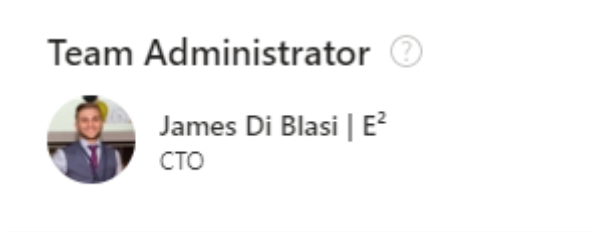
18.2 Permissions

18.2.1 Board Administrator & Secondary Administrators


Both the Board Administrator and Secondary Administrator role provides additional capability and functionality to Board Connect.



There are no functional differences between the Board Administrator and Secondary Administrators. However, only the Board Administrator will display as the “Team Administrator” on the Board Connect landing page.



18.2.2 How to update the Board Administrator Role

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page.
3. Select Board Configuration.
4. Within the Board Administrator section, of the Permissions tab.
5. Within either the Board Administrator people field or Secondary Administrators, add the user to be added as the Team Administrator.

Note: Only one user can be added as a Board Administrator, whereas up to ten users can be added as a secondary administrator.

Board Administrator



James Di Blasi | E² ✕

6. Click **Save**.

18.2.3 Merge Documents flow

The Board Connect software allows for integration with Power Automate, and specifically Adobe Acrobat to provide the capability to merge multiple documents associated to the meeting into one single merged file.

The url of the workflow process can be set within the configuration section of your Board.

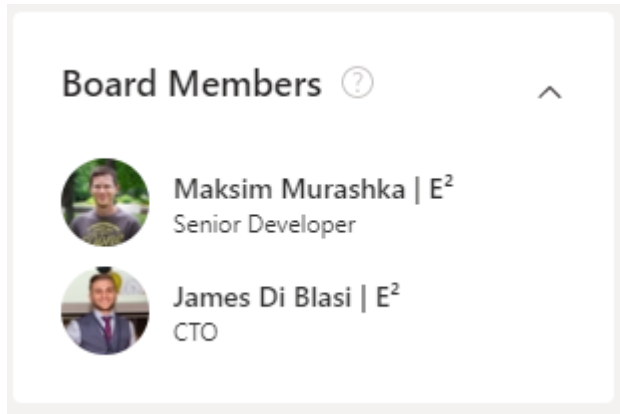
Full details on how to import and configure the workflow can be found [here](#).

Merge Documents flow
URL


Flow URL

18.2.4 Board Members

The Board Members role is a way to signify who are members of the Executive Board, or committee itself. In some scenarios, additional users may have access to the Microsoft Team, however – are not Board or Committee members. Setting the Board Members updates the list of users on the landing page of Board Connect but will also be tied into functionality of future releases.



To update the Board Members component;

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page.
3. Select Board Configuration.
4. In the Permissions tab > Within the Board Members section, type in the name of the desired member and click on them to populate their name. Click Save when all the desired Board members have been added.



Please note: Adding a user as a Board Member adds the user as a member of the Microsoft Team if they are not already added.

18.3 Templates

Board Connect allows two different types of templates to be consistently added to your meetings: Agenda templates and Document templates.

18.3.1 Agenda Template

An agenda template helps staff organising their meetings to consistently create meetings with the same agenda structure. To create an agenda template, please follow these steps:

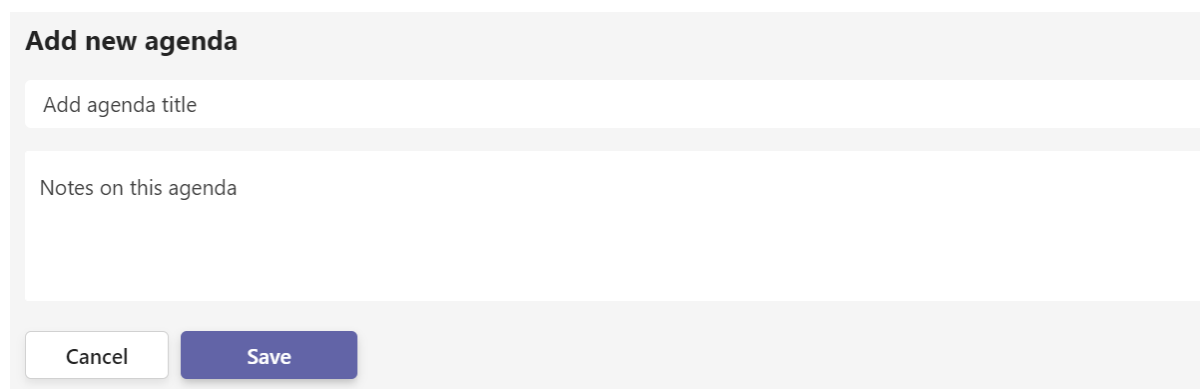
1. Browse to the Board Connect landing page.
2. Click the settings cog
3. Click Templates

From here, you can start to manage the Agenda template.

18.3.1.1 Creating an Agenda template Item

In the Agenda Templates tab, select Manage agenda template

1. Click on + Add Agenda Item
2. Add a title & description for the templated agenda item



Add new agenda

Add agenda title

Notes on this agenda

Cancel Save

3. Click Save

18.3.1.2 Adding an Agenda template sub-item

In the Agenda Templates tab, select Manage agenda template

1. Next to Add Agenda Item > Select + Add Sub-agenda Item

18.3.2 Document Templates

Document templates can be added by doing the following:


2. Browse to the Board Connect landing page.
3. Click the settings cog
4. Select Board Configuration.
5. Click Templates > Managed document template
- 6.

From the Templates tab, click

18.4 Notifications

Notification settings allow team owners and administrators of Board Connect to control when end users receive Board Connect related Teams notifications.

To turn on or off Notifications;

4. Browse to the Board Connect landing page.
5. Click the settings cog () on the right side of the page.
6. Select Board Configuration.
7. Click Notifications.

General License Permissions **Notifications** Templates


8. Find and enable / disable the notification of interest.

Meeting attendees Send an email and activity feed notification to all meeting invitees

18.4.1 Agenda is ready notification

The Agenda is ready notification sends a templated email and teams activity feed notification message, outlining the meetings' agenda to users who are invited to the meeting.

To turn on or off the functionality to send an agenda is ready notification;

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page
3. Select Board Configuration.
4. Click Notifications.

5. Turning on the option, will show the button to send the activity feed and email for meeting respondents.

Agenda is ready
notification




Show button to send Activity Feed notification for meeting respondents

18.4.2 Send notification when assigned a decision.

To enable notifications to be sent in the scenario of a decision or flying minute (circular resolution) being assigned, please follow these steps:

To turn on or off the functionality to send an agenda is ready notification;

1. Browse to the Board Connect landing page.
2. Click the settings cog () on the right side of the page
3. Select Board Configuration.
4. Click Notifications.
5. Turning on the option, "Decisions respondents"

Decisions respondents



Send notification to a user who is added to a decision or flying minutes respondents

19 Conflict of Interest

Conflict of interests can be configured for this board.

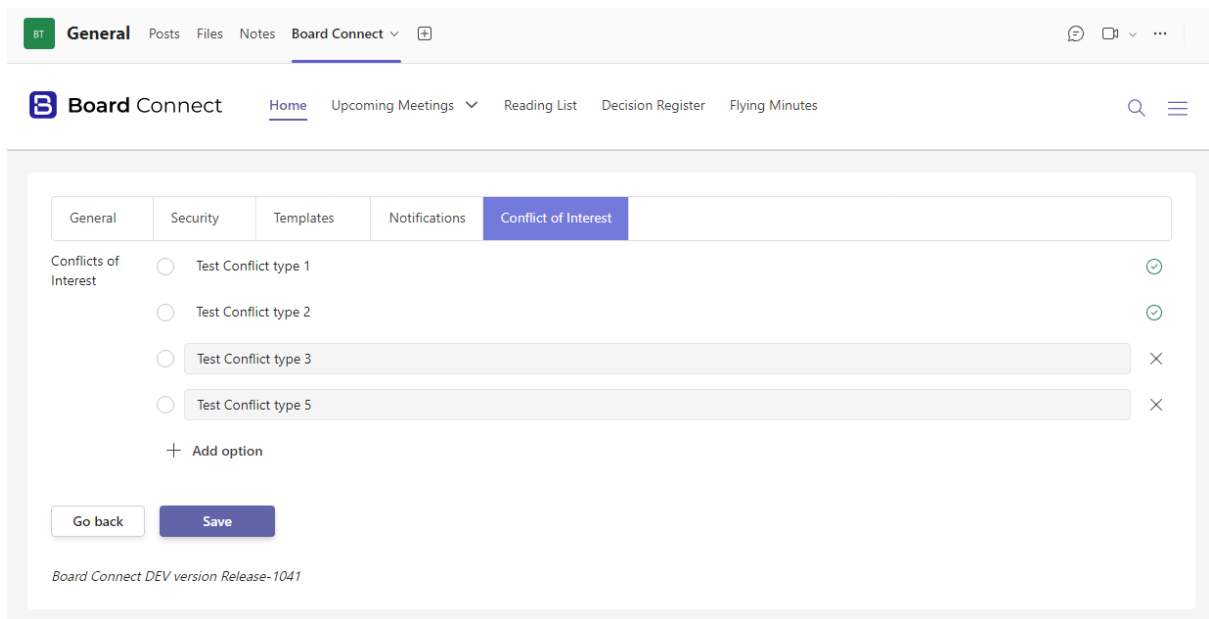
There is a requirement of at least 1 conflict, and a maximum of 5 Conflict of Interests configured.

The conflict of interest must fit in a single line of text.

19.1 Editing Conflicts of Interest

To Add/Remove/Edit Conflicts of interest:

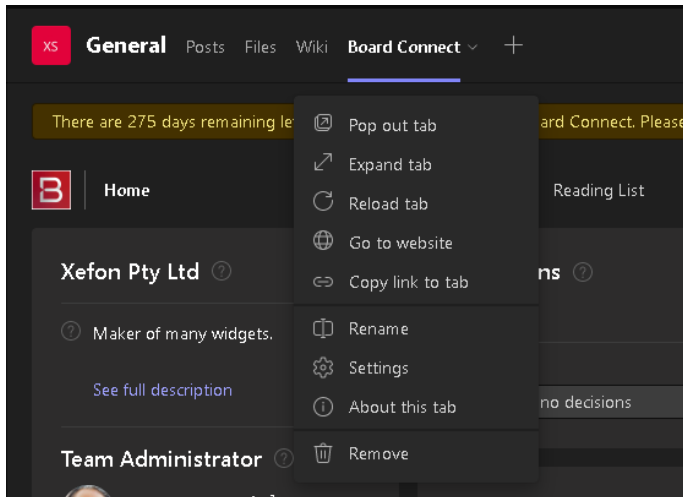
1. Go to the Settings page
2. Click on the Conflict of Interest tab
3. Click on the + Add option button
4. Edit the text in the new field that has been added
5. Click Save to confirm your changes, or Go back to exit without saving.



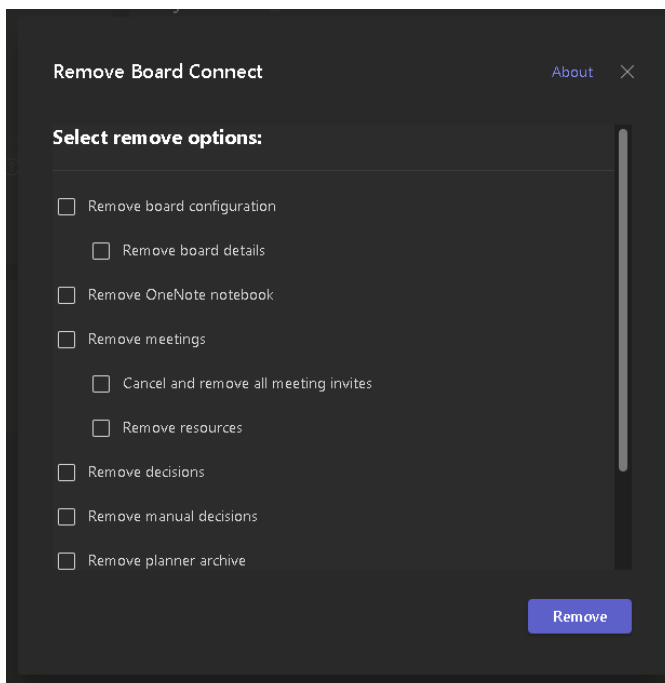
20 Removing Board Connect

20.1 Removal Process

1. In the Dashboard, click on the drop down to see the tab options. Click on Remove.



2. The Remove Board Connect window will appear.
3. Select the items for removal. Once removed, any residual files will be permanently deleted from your Tenant.



19.2 Removal Options

When removing Board Connect, the files it created can be retained or removed from the tenant.

1. Remove Board Configuration

Removes settings saved within the Board Configuration window. If only the *Remove Board Details* item is checked, only the details of the board will be removed, but the settings files will be retained.

2. Remove OneNote notebook

Deletes the notebook that was created at the time of installation.

3. Remove Meetings

Deletes all meetings and notifies all meeting invitees of meeting cancellation as well as removing all files associated with previous and future meetings.

Cancel and remove all meeting invites will issue cancellations to all meeting invitees.

Remove resources will delete all attachments to meetings.

4. Remove Decisions

Deletes all decisions including their results and attachments, including flying minutes and decisions made within a meeting.

5. Remove Manual Decisions

Deletes all manual decisions and any attachments, including those made within a meeting

6. Remove Planner Archive

Deletes all tasks assigned as part of meetings from Microsoft Planner.

7. Remove collaboration app

If created upon installation, removes the Draft Meetings channel and all associated data.

8. Remove templates

Deletes all meeting agenda templates.

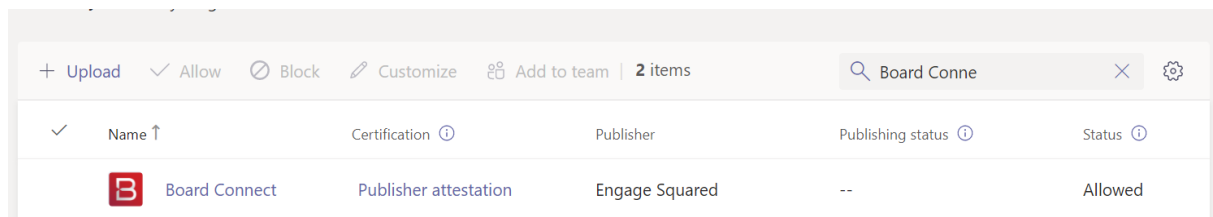
21 Licensing

21.1 Check the teams where Board Connect is installed


To check what teams have installed Board Connect;

Note: Teams Administrator access is required to review Board Connect's installation locations.

1. Browse to the [Teams administrator](#) page
2. Search for Board Connect



The screenshot shows the Microsoft Teams application interface. At the top, there is a navigation bar with options: '+ Upload', 'Allow', 'Block', 'Customize', and 'Add to team | 2 items'. A search bar on the right contains the text 'Board Conne' and a search icon. Below the navigation bar is a table with the following columns: 'Name ↑', 'Certification ⓘ', 'Publisher', 'Publishing status ⓘ', and 'Status ⓘ'. The table contains one row with the following data: 'Board Connect' (with a red 'B' icon), 'Publisher attestation', 'Engage Squared', '--', and 'Allowed'.

✓	Name ↑	Certification ⓘ	Publisher	Publishing status ⓘ	Status ⓘ
	 Board Connect	Publisher attestation	Engage Squared	--	Allowed

22 Managing SharePoint permissions

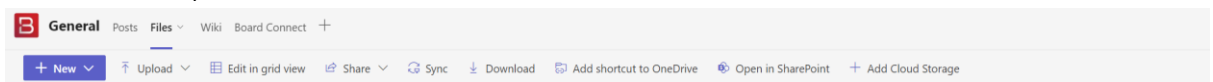
In some rare instances, you may want to control the permission to the documents within your SharePoint folders. The following instructions take you through how to break inheritance of permission, so that you can create a new set of permissions.


Note: Undertaking this action and setting the incorrect permission for a user, may lead to an access is denied error.

22.1 Updating document permissions for all meetings

Pre-Requisites: User must be a Primary or Secondary Administrator within Board Connect

1. From the General channel of the Board Connect team, click Files.
2. Click Open in SharePoint. This will open your default web browser (Note: you may need to log into your tenant, if you are not authenticated)



3. Click the settings cog () in the top right-hand corner of the page
4. Click Library settings
5. Click More library settings

Library settings ×

Name *

Description

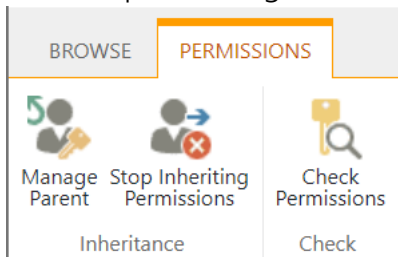
[More library settings](#)

6. Click Permissions for this document library

Permissions and Management

- [Permissions for this document library](#)
- [Manage files which have no checked in version](#)
- [Workflow Settings](#)
- [Apply label to items in this list or library](#)
- [Enterprise Metadata and Keywords Settings](#)

7. Click Stop Inheriting Permissions



8. Select the Members & Visitors group. – Please note, the name of this group will depend on your Teams Name. However, Members, and Visitors will be consistent.

<input type="checkbox"/>	<input type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/>	Board Connect - Production Demo Members	SharePoint Group	Edit
<input type="checkbox"/>	Board Connect - Production Demo Owners	SharePoint Group	Full Control
<input type="checkbox"/>	Board Connect - Production Demo Visitors	SharePoint Group	Read

9. From the Top Ribbon, click Remove User Permissions