


Minute Keeper (Web) Database

Initial Setup

Version 1.1



Minute Keeper

Your meetings online, anytime, anywhere!

Dashboard Meetings Actions Documents Contacts Admin

accountholder@youremailaccount.com

Account

Details Password Settings

Avatar

Title

Ms

First Name

Sample

Last Name

Account Holder

Email

accountholder@youremailaccount.com

Phone

Account Holder's phone number


Home

Dashboard

Account

Help Desk

Logout



Minute Keeper

Your meetings online, anytime, anywhere!

Dashboard Meetings Actions Documents Contacts Admin

accountholder@youremailaccount.com

Admin Settings

Save

Company Settings Permissions Lists Theme

Meeting List















Meeting Details

Meeting Actions List

Meeting Actions Details

Document List

Document Details

Actions	User Role	Read	Modify	Delete
	Standard User			
 	Administrator			
 	Staff			

Minute Keeper Database

Initial Setup

Thanks to:

- Microsoft® Corporation
- Martin Iannuzzi
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The sample data is fictional.

If you wish to offer comments and/or suggestions, please email Mark O'Reilly.

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Screen shots within this text are reprinted by permission from Microsoft® Corporation.

Note that screen images presented in this manual may vary from those on your computer depending on your current Internet browser, and the current version of the Minute Keeper database.

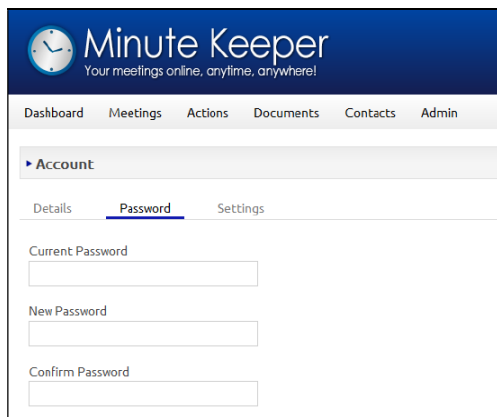
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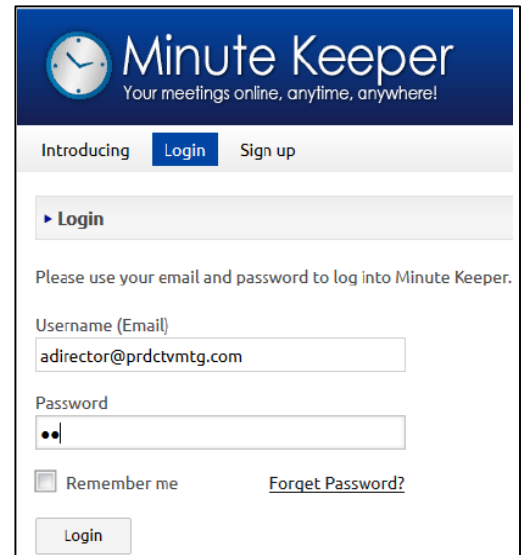
Initial Setup

Logging In

1. Bring up the Minute Keeper (Web) Database (<http://my.minutekeeper.com>) using your web browser of choice.
2. Click on the **Login** menu option. Login to Minute Keeper using the username and password supplied.
3. You may be prompted to change your password.



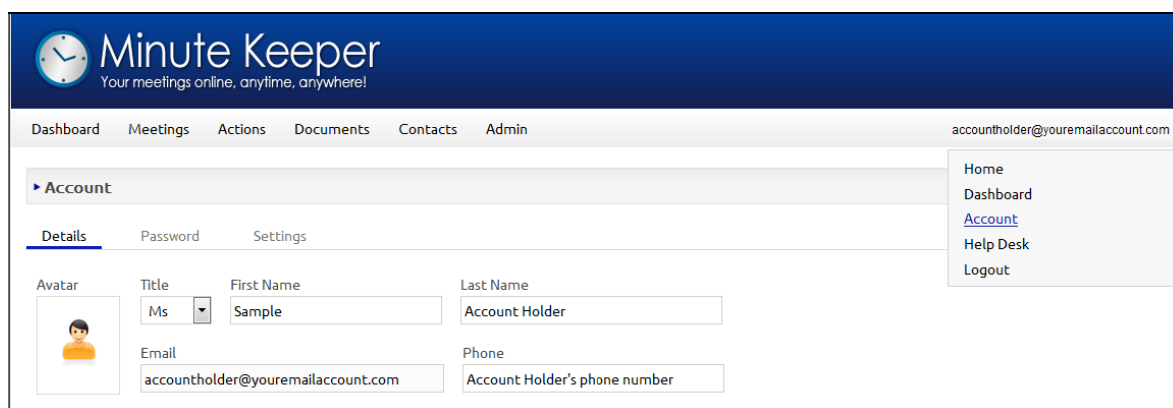
The screenshot shows the Minute Keeper web application interface. At the top, there is a navigation bar with the Minute Keeper logo and the tagline "Your meetings online, anytime, anywhere!". Below the navigation bar, there is a menu with options: Dashboard, Meetings, Actions, Documents, Contacts, and Admin. The main content area is titled "Account" and has three tabs: Details, Password, and Settings. The "Password" tab is currently selected. Under the "Password" tab, there are three input fields: "Current Password", "New Password", and "Confirm Password".



The screenshot shows the Minute Keeper web application login page. At the top, there is a navigation bar with the Minute Keeper logo and the tagline "Your meetings online, anytime, anywhere!". Below the navigation bar, there is a menu with options: Introducing, Login, and Sign up. The "Login" option is currently selected. Below the menu, there is a "Login" button. Below the button, there is a message: "Please use your email and password to log into Minute Keeper." Below the message, there are two input fields: "Username (Email)" and "Password". The "Username (Email)" field contains the text "adirector@prdcvtmtg.com". The "Password" field contains two dots. Below the input fields, there is a checkbox labeled "Remember me" and a link labeled "Forget Password?". At the bottom, there is a "Login" button.

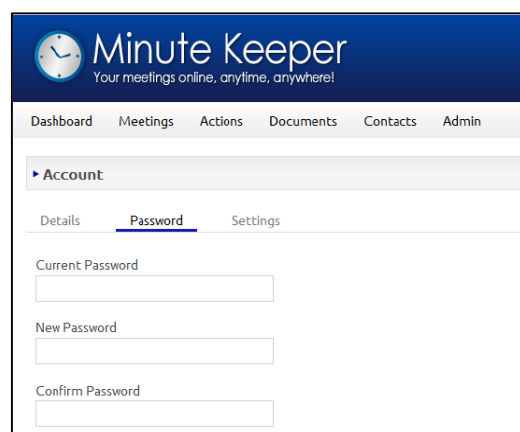
Account Setup

1. Click on your email address on the top right hand side of the Minute Keeper screen.
2. From the drop down menu, select: [Account](#)



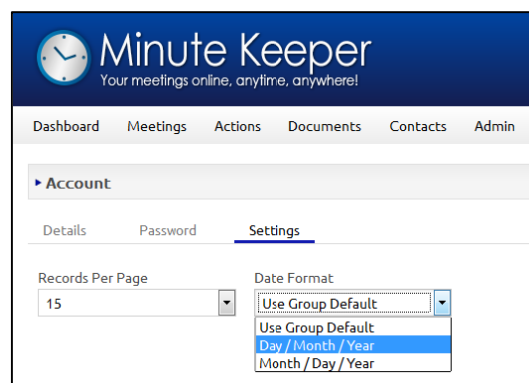
The screenshot shows the Minute Keeper web application interface. At the top, there's a blue header with the Minute Keeper logo and tagline "Your meetings online, anytime, anywhere!". Below the header is a navigation bar with links: Dashboard, Meetings, Actions, Documents, Contacts, and Admin. On the right side of the navigation bar, the user's email address "accountholder@youremailaccount.com" is displayed. Below the navigation bar, there's a dropdown menu with options: Home, Dashboard, **Account** (highlighted), Help Desk, and Logout. The main content area is titled "Account" and has three tabs: Details, Password, and Settings. The "Details" tab is currently selected. It contains a form with the following fields: Avatar (with a default user icon), Title (a dropdown menu showing "Ms"), First Name (text input with "Sample"), Last Name (text input with "Account Holder"), Email (text input with "accountholder@youremailaccount.com"), and Phone (text input with "Account Holder's phone number").

3. On this screen, edit the details of the primary user for your group.
4. Save your updates by clicking on the **Save** button on the top right of this screen.
5. To change your current password, click on the **Password** tab. Enter your current password and your new password as indicated.
6. Again, click on the **Save** button on the top right of this screen to save your changes.



This screenshot shows the "Password" tab selected in the Account setup screen. The form contains three password input fields: "Current Password", "New Password", and "Confirm Password". The "Save" button is visible in the top right corner of the form area.


7. Click on the **Settings** tab to change the number of entries (records) you wish to view on the various list pages, and to select your default Date format.
8. Again, click on the **Save** button on the top right of this screen to save your changes.

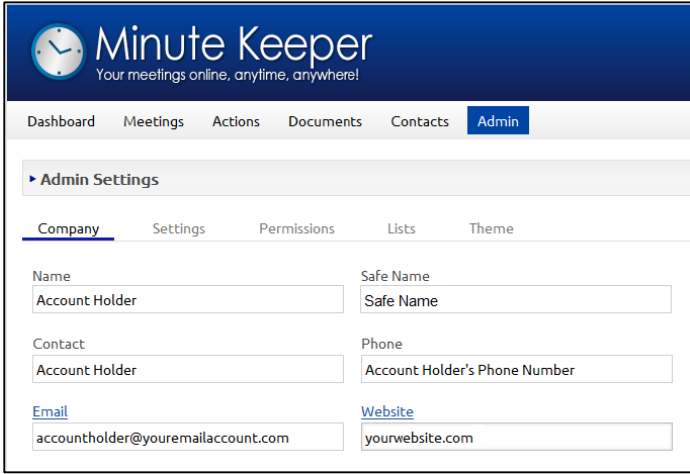


This screenshot shows the "Settings" tab selected in the Account setup screen. The form contains two settings: "Records Per Page" (a dropdown menu showing "15") and "Date Format" (a dropdown menu with options: "Use Group Default", "Use Group Default", "Day / Month / Year" (highlighted), and "Month / Day / Year"). The "Save" button is visible in the top right corner of the form area.

Setting up your Admin Settings

Adding/Editing Company Details

1. From the Main Menu click on the **Admin** button. The **Admin Settings** menu will be displayed along with the Company Details screen.
2. Edit your company details – Contact Name, Phone Number, primary Email Address and Website as required.
3. Click on the **Save**  button on the top right of this screen to save your changes.

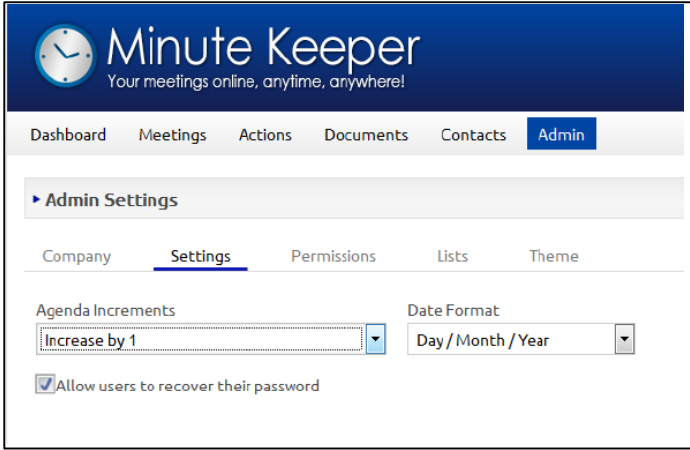


The screenshot shows the Minute Keeper Admin Settings interface. The top navigation bar includes Dashboard, Meetings, Actions, Documents, Contacts, and Admin. The Admin Settings menu is expanded, showing tabs for Company, Settings, Permissions, Lists, and Theme. The Company tab is active, displaying fields for Name (Account Holder), Safe Name (Safe Name), Contact (Account Holder), Phone (Account Holder's Phone Number), Email (accountholder@youremailaccount.com), and Website (yourwebsite.com). A Save button is visible on the top right.


Adding/Editing Settings

4. Click on the **Settings** tab within the Admin Settings menu.
5. You may wish to auto-increment your agenda items by whole numbers (1, 2, 3, 4...) or by fractions (1.0, 1.1, 1.2, 1.3...) – select as preferred.

Within this screen, you are also able to select your preferred Date format, and select whether you wish to allow users to recover their password.



The screenshot shows the Minute Keeper Admin Settings interface with the Settings tab selected. The Settings tab displays fields for Agenda Increments (Increase by 1) and Date Format (Day / Month / Year). There is also a checkbox for Allow users to recover their password, which is checked. A Save button is visible on the top right.

6. Click on the **Save**  button on the top right of this screen to save your changes.

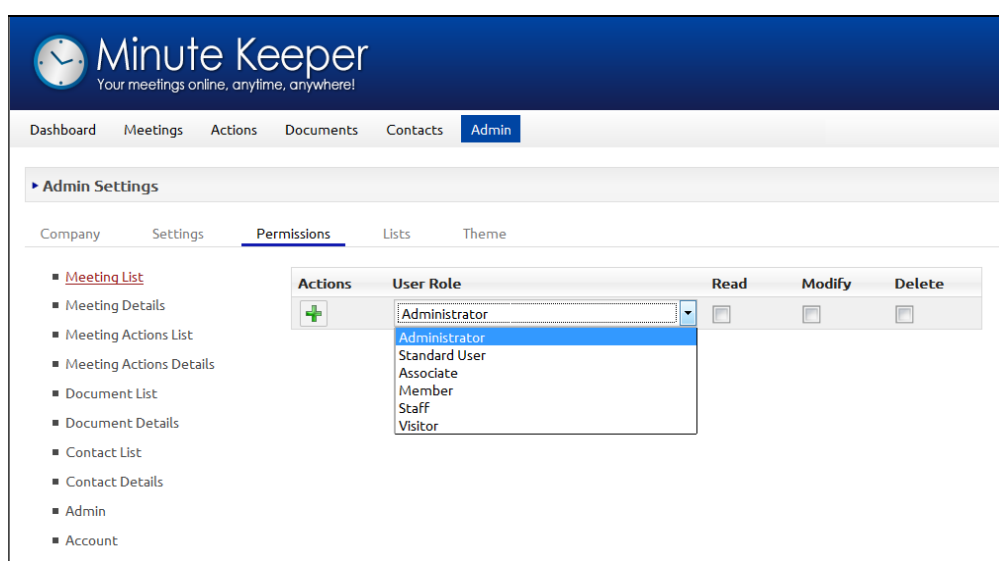
Managing Permissions

7. Click on the **Permissions** tab within the Admin Settings menu.
8. For each of the various components within Minute Keeper you are able to allocate which User Roles (groups of users) have permission to read (view), modify (add & edit) and delete entries (records).

Note: You are able to add and remove User Roles within the Admin - Lists component – discussed in the next section (Managing Lists) of this manual.

9. Select each component listed - in turn - on the left hand side menu. Then add your User Roles to allocate their permissions. For instance:


- 9.1 Click on Meeting List on the menu on the left hand side of the screen.

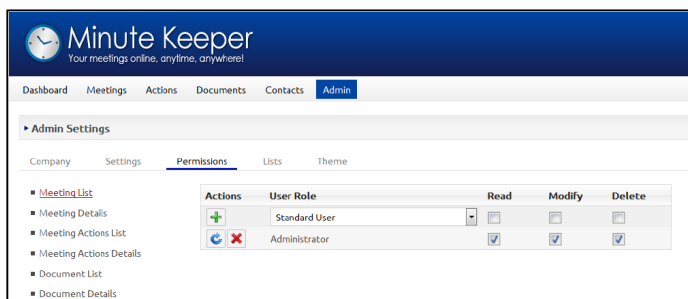


- 9.2 Select: **Administrator** under User Role.

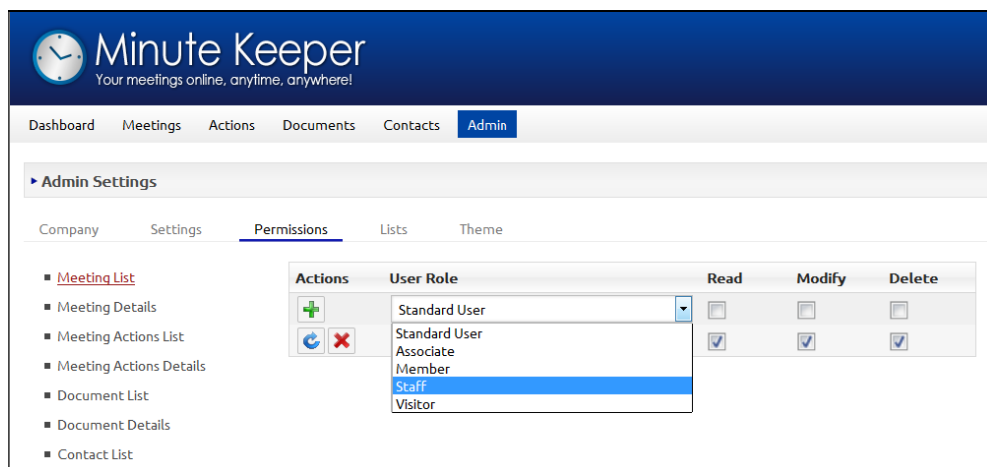
- 9.3 Add ticks to the relevant check boxes only where you wish these users to be allowed to:

- ☒ Read Meeting List entries.
- ☒ Modify Meeting List entries and/or...
- ☒ Delete Meeting List entries.

- 9.4 Click on the **Add**  button under **Actions** to add your **Administrator** Role permissions.



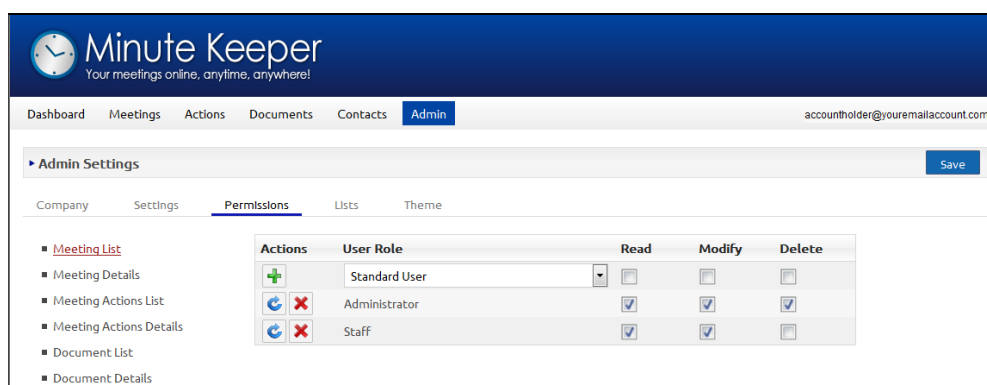
- 9.5 With Meeting List still selected on the left hand menu, select your next User Role, for instance: **Staff**.



- 9.6 Again add ticks to the relevant check boxes only where you wish **Staff** users to be allowed to:

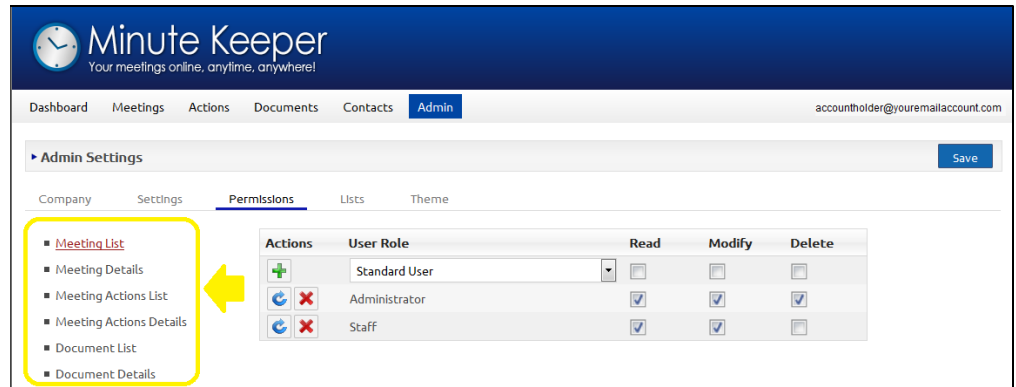
- ☐ Read Meeting List entries.
- ☐ Modify Meeting List entries and/or...
- ☐ Delete Meeting List entries.

- 9.7 Click on the **Add** button under **Actions** to add your **Staff** Role permissions.



Note: you are able to edit your selections for each user group and then resave using the **Update** button to the left of each User Role. You are able to use the **Delete** button to delete the User Role from the current database component.

- 9.8 Repeat steps 9.2 to 9.7 for each of the menu options listed on the left hand side of the screen.








Minute Keeper
Your meetings online, anytime, anywhere!

Dashboard Meetings Actions Documents Contacts Admin accountholder@youremailaccount.com


Admin Settings Save

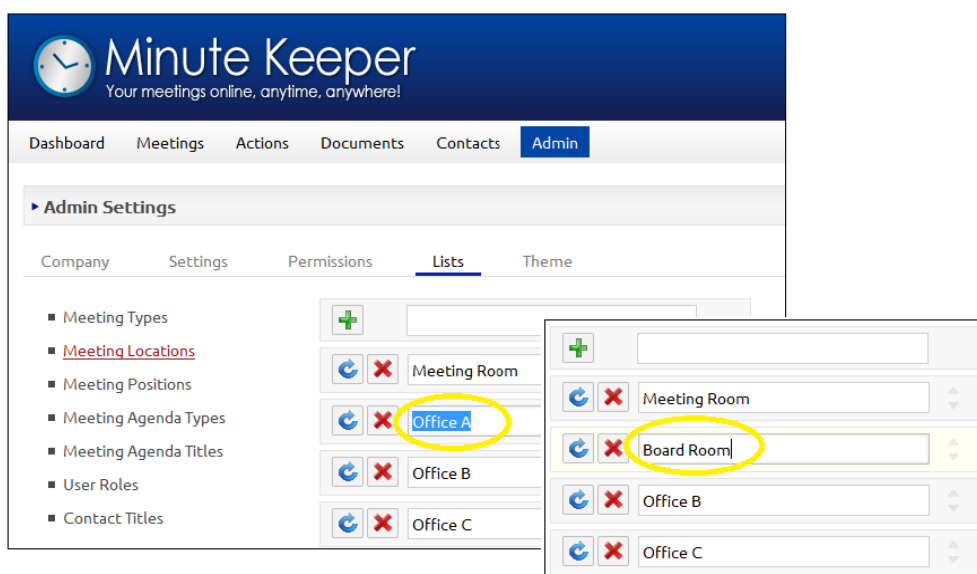
Company Settings Permissions Lists Theme


- Meeting List
- Meeting Details
- Meeting Actions List
- Meeting Actions Details
- Document List
- Document Details

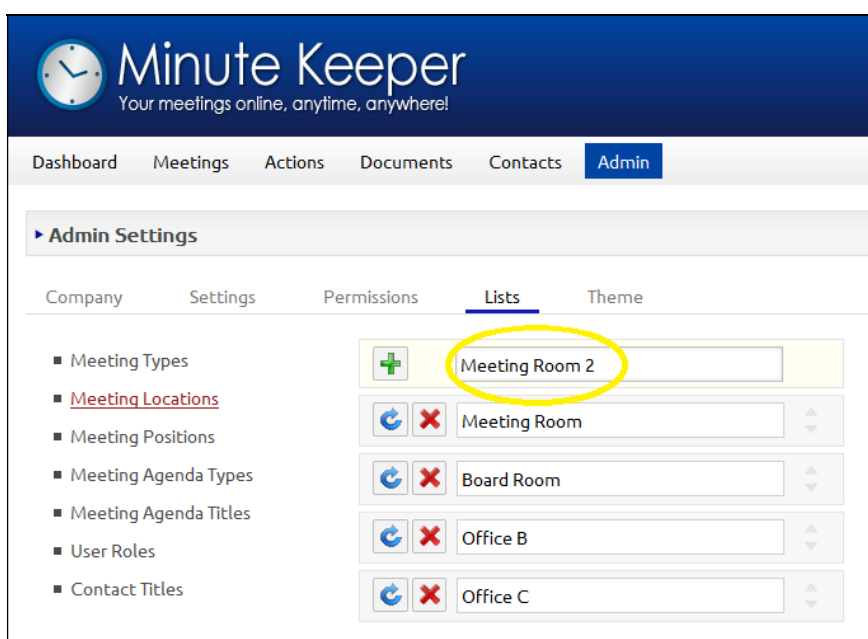
Actions	User Role	Read	Modify	Delete
	Standard User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 	Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>


Managing Lists

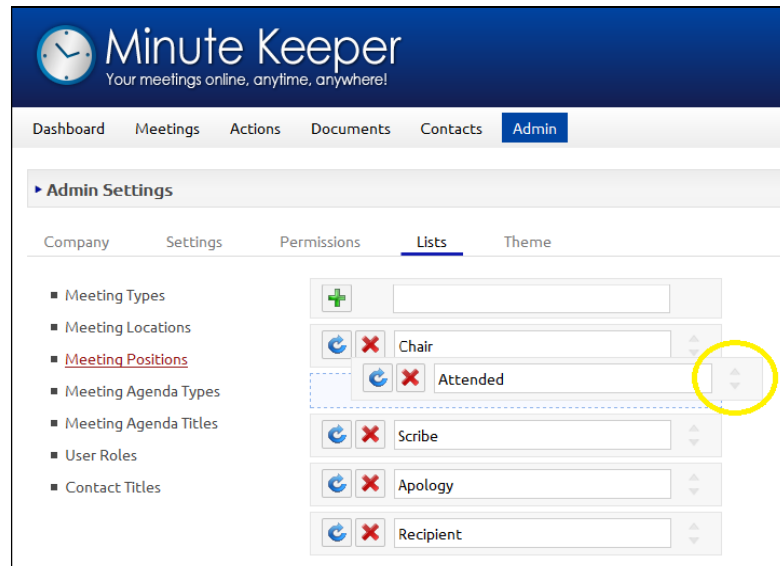
10. Click on the **Lists** tab within the Admin Settings menu. Again a set of menu options will be displayed on the left hand side of the screen. Clicking on these menu options will display a series of lists to the right of this menu. These lists are used within the various drop-down lists within the Minute Keeper application.
11. Click on each menu options in turn (*on the left of the screen*) and review the default list entries provided. Within each list, you are able to:
 - 11.1 **Edit** an existing entry by typing the change directly into the applicable text field and then clicking the **Refresh**  button to the left of the entry.



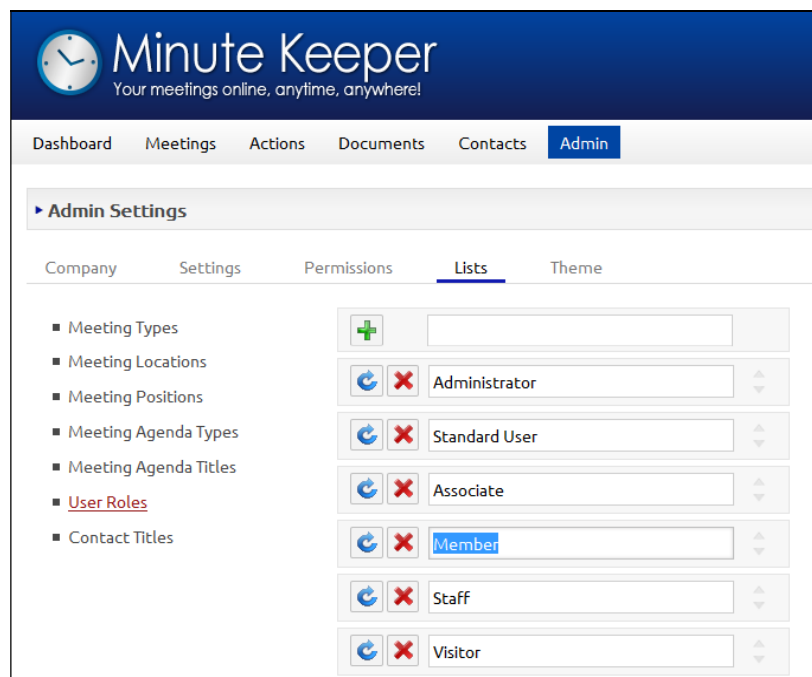
- 11.2 **Add** an existing entry by typing the entry directly into the text field at the top of the list and then clicking the **Add**  button to the left of the entry.



- 11.3 **Delete** an existing entry by clicking the **Delete**  button to the left of the entry you wish to remove. Complete this action with due care.
- 11.4 **Reorder** existing entries by clicking the right-hand side of an entry and dragging it into the required list position.

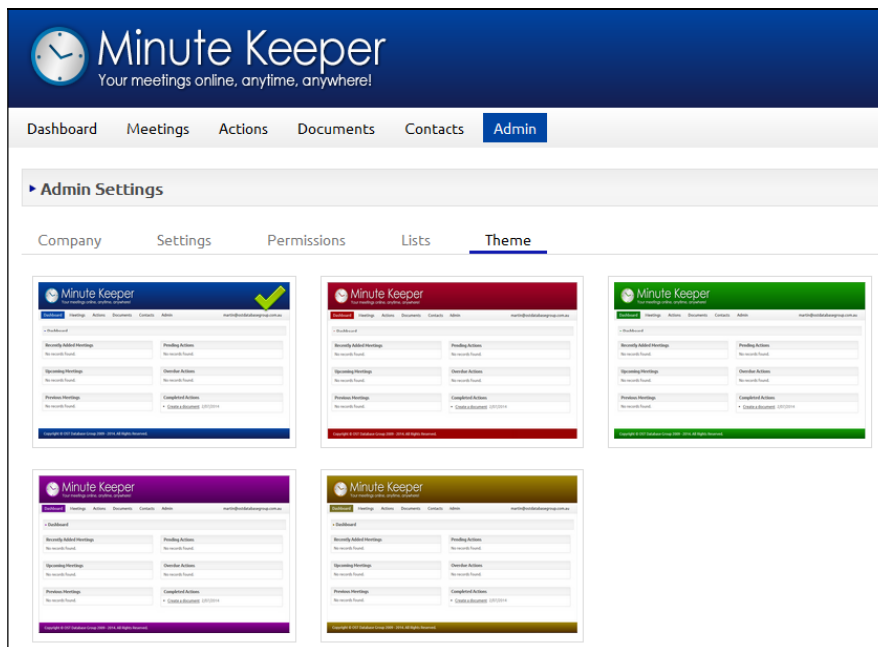


12. Note the menu option and list provided for you to add, edit and delete **User Roles** applicable to your user group or team.



Setting a Theme

13. Click on the **Theme** tab within the Admin Settings menu.
14. Click on an image to select your theme preference.

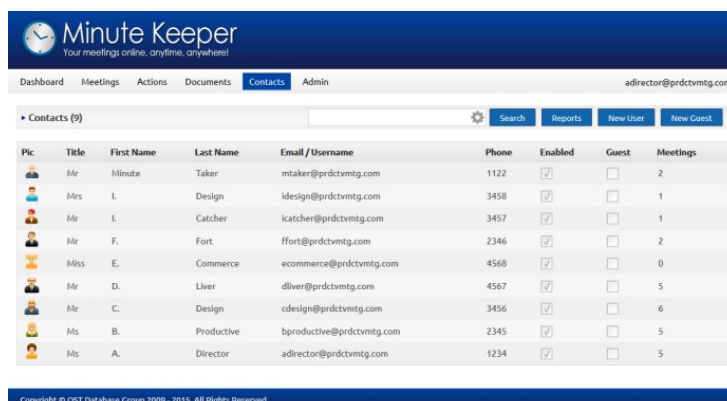


Managing Contact Details

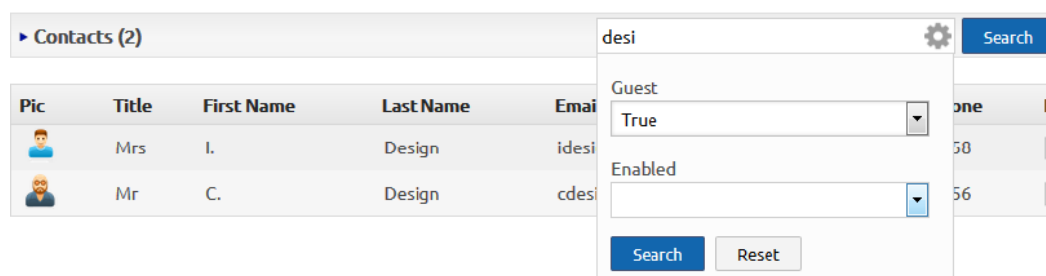
From the Main Menu click on the **Contacts** button. The Contacts List screen will be displayed.

Viewing and Searching Contacts

In the top middle of the Contacts List screen, you are able to enter a **search string** to filter the contact list. For instance, you may wish to display people with the surname 'Design' in the list. In this case you would type the string - *desi* - into the search string text box and press either the **ENTER** key on the keyboard or the **Search** button to the right of the search box. The list will be filtered accordingly, and will display only people where the letters – *desi* – occurs in their name.



You are also able to click on the **Cog** button **within the Search box** so that you might also filter contacts that are Guests and are currently enabled. Drop down the lists attached to these entries and select your applicable preference. Click on the **Reset** button to reset all the filters.



The list of items in the middle of the screen provides access to the Contact Details screen, on which you can add a new contact, edit a contact's details, and/or delete a contact:

- You are able to **click on any part of the rows** in the middle of the screen. A Contact Details screen will be presented within which you can edit the details.
- You can **click on the New User or New Guest** buttons to **create** a new contact entry.
- You can **click on the Reports** button to **view and print** a report of the entries currently displayed in the list.

Adding Users and Guests

The **Contact Details** screen allows you to enter the details of meeting participants.

Add the details in the usual way, moving between fields using the TAB key on the keyboard.

Note the **enabled** option on the top right of the contact detail. This can be used (*for instance*) where you need a contact to remain in the system - as they have meeting items attached to them - but they are not currently active in your team.

The screenshot shows the 'Contact Details' screen for a user named 'A. Director'. The interface includes a navigation bar with 'Dashboard', 'Meetings', 'Actions', 'Documents', 'Contacts' (selected), and 'Admin'. Below the navigation bar, the user's name 'A. Director' is displayed with an 'Enabled' checkbox. The 'Details' tab is active, showing fields for Avatar, Title (Ms), First Name (A.), Last Name (Director), Email (adirector@prdctvmtg.com), and Phone (1234).

Where permissions allow, click on the **User** tab to add / edit the user's password, or to add or remove (*manage*) the user's roles.

The screenshot shows the 'User' management screen for 'A. Director'. The 'User' tab is active, displaying fields for Username (adirector@prdctvmtg.com) and Password (masked with dots). Below these fields, there is a 'User Roles (Add / Remove)' section. It shows a list of roles: 'Administrator' and 'Standard User'. A yellow box highlights the 'Standard User' role, indicating it is being managed.

To add a role, click on the **User Roles Add / Remove** link. Using the left hand mouse button, click on and drag one of the roles in the right hand list and drop it into the list on the left.

Do the reverse to remove a role.

The diagram illustrates the role management process using three overlapping screenshots. The top screenshot shows the 'User Roles (Add / Remove)' section with a list of roles: 'Standard User' and 'Administrator'. A yellow box highlights the 'Standard User' role. The middle screenshot shows the 'Standard User' role being dragged from the right-hand list to the left-hand list. The bottom screenshot shows the 'Standard User' role in the left-hand list, indicating it has been successfully added.

To delete an individual contact, you need to click on the **Delete** button on the top right of the contact detail page. You will be provided with two options - to make this user inactive or to delete them all together.



How would you like to delete this contact?

Soft Delete will remove Martin from the contacts list and you won't be able to assign them to new meetings and actions.

Hard Delete is similar to soft delete but will also remove Martin from all previous meetings, agendas and actions.

Note: *Be very careful using the latter option* - contacts will be linked to meetings and agenda items, so it is important that they are not completely removed from the database without due consideration. That said:

- You may wish to remove their access and/or change their password.
- You may wish to remove their details and/or name and enter place holder information, eg: initials instead of names, a default/non-specific business email address for their live email address, and remove their phone contact details.