Getting started with **My ContractManager**

My ContractManager is your intelligent virtual assistant for all your contract management needs. Manage your entire contract life cycle, including email traffic, meetings, tasks, documents, requirements, contract changes, and automated performance updates.

Welcome to MyContractManager, your digital assistant to manage your contracts effectively and save more time! It contains 6 modules in total:

1. Meetings
2. Requirements
3. Emails
4. OGSM
5. Stakeholder issues
6. Contract Calendar

This module provides guidance on how to use the Meetings Module.

This guide is designed to provide documentation for people who will use this tool on a day-to-day basis. This document can be read by any user.

Contents

1. Why use a digital assistant to improve your Meetings?

1.1 Most people feel that meetings could be more productive

- Greater than 60% of the meetings are actually not required
- Most people think meetings are waste of time
- People who have back to back meetings are more stressed
- Participating in meetings that are not necessary to be present becomes unproductive
- A disorganized meeting leads in loss of interest

1.2 Tips for perfect meetings

- Have an Agenda
- Agenda items should be written in a form of question to be answered
- Meetings should not be scheduled for an hour. Use 55 minutes or 25 minutes as a best practice to give participants time between meetings, as well as yourself time to complete the meeting notes
- Send meeting documentation at least 24 hours before the meeting

- What is a perfect meeting name ' <Topic/clients/meeting type> : <purpose of meeting(what should be the result of the meeting)> e.g. <Team | Bizaline | Weekly meeting: Business plan discussion>
- Who should be invited to the meeting, who needs to actually attend the meeting, who is optional and who needs to be informed?
- Is this meeting linked to a previous one?
- Were there outstanding actions from the last meeting and what is the status?
- If due dates arrive before the next meeting, find the person responsible for the action and get a status update?

1.3 Questions to take into consideration when organizing a meeting

- Do you actually need to talk to each other or can you send the information and have them respond without a scheduled meeting?
- Do you need to see the participants face to face or can you see them online?
- What should be the result of this meeting?
- Are your agenda points written as a decision or just to share information?
- Who will be making the decisions on the agenda point?
- How long will it take for the discussion around the agenda point and who is in the lead for the discussion?
- Is this a regular meeting with the same participants?
- Are there people that need to be informed of the results of the meetings but they may not be participating?
- Are there decisions that are made during the meeting that need to be documented?
- Is this a project related meeting or a departed meeting or a client meeting or a one to one meeting?
- Do you need to store the minutes/notes/summary of the meeting?
- Do you need to send the minutes to the participants for approval? Yes
- Are you setting up a meeting or are you writing up notes from the meeting?
- Has the meeting already finished or are you preparing for the meeting?
- Is this an internal meeting or an external meeting?
- Is this related to a specific project?

1.4 Why use MyContractmanager?

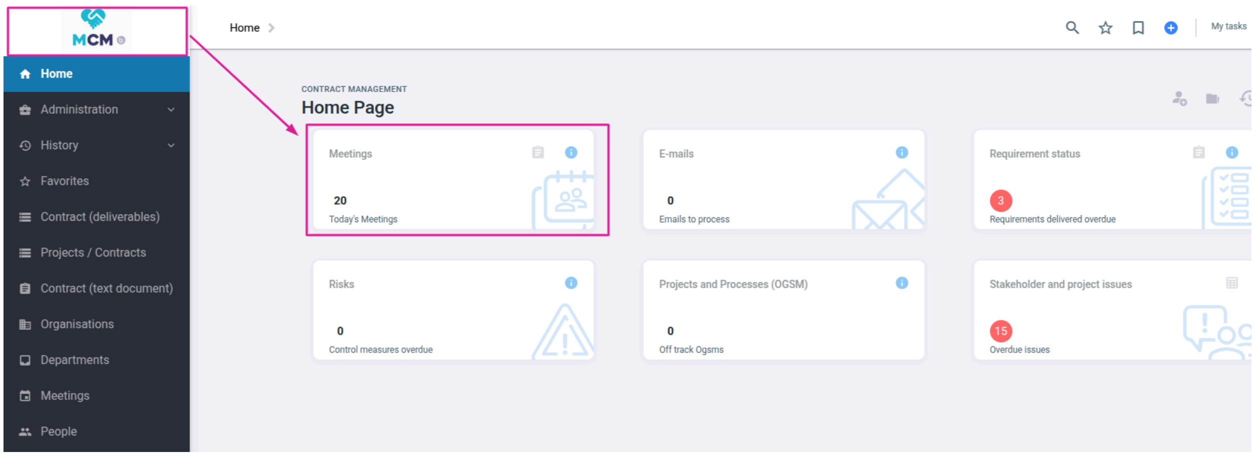
MyContractmanager has an answer for each question above. It will help you not maintain the history of the meetings during the time and also stay organized by filling the agenda with the needed information. You will be able to take notes, decisions, set actions and there are plenty of other features that will help you monitor your agenda.

2 Get started with the Meetings Module

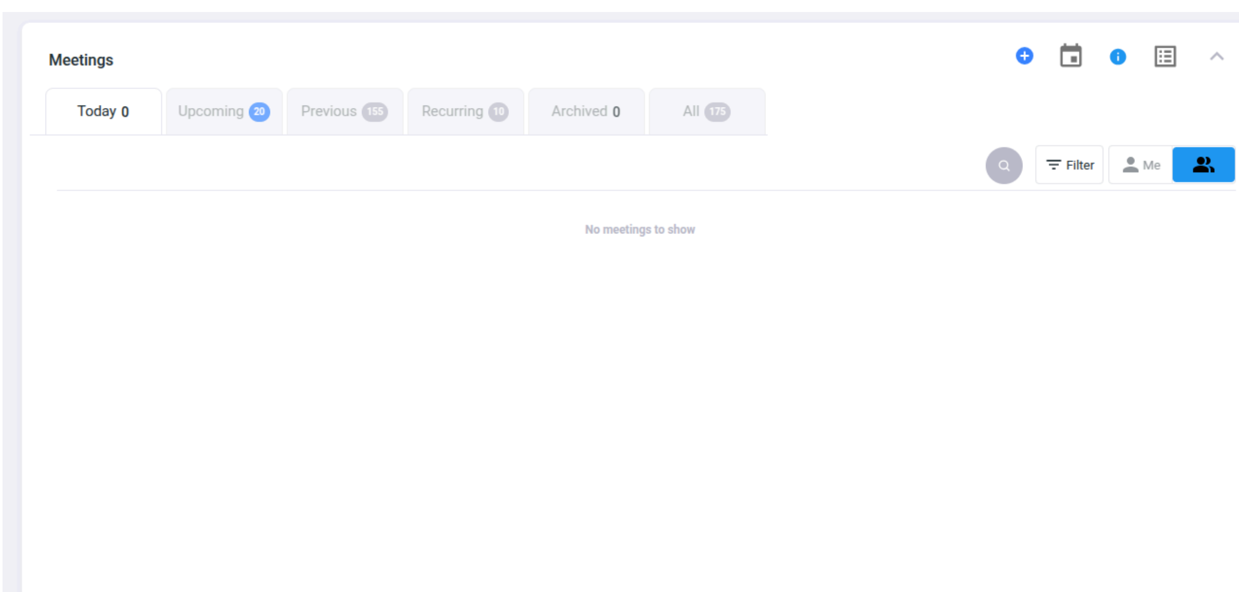
This manual assumes you already have access to MyContractmanager. If not please contact us info@bizaline.com and we will help you create your workspace.

First step: Go to your Dashboard page and open the meeting tile

Click on the company logo on the top-left corner and you will see the dashboard with different fast sections (tiles) that allow you to do more in a few clicks.



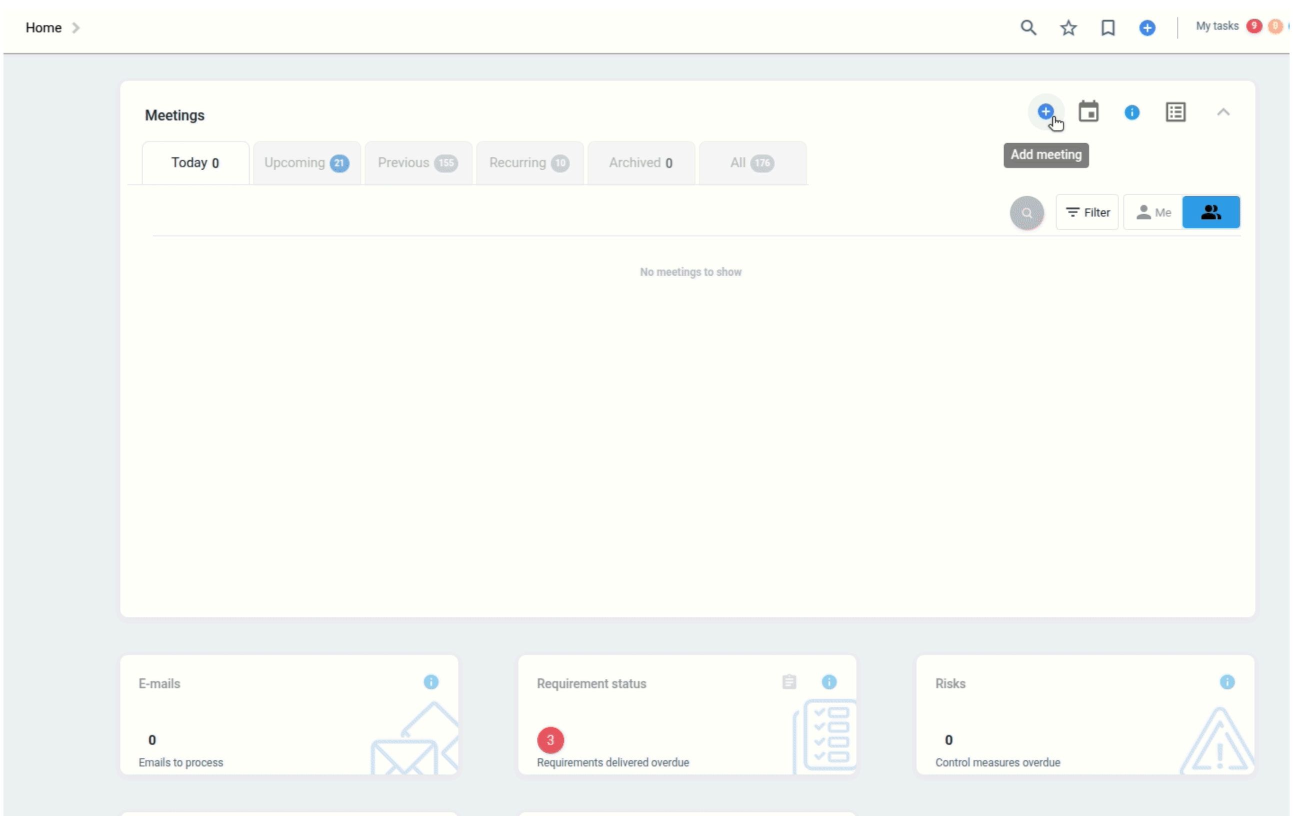
By clicking on the meeting tile, you will be able to have a panoramic view of all meetings, but on the first sight you will see today's meeting. Here we show what it looks like:



After opening the Tile, you will be able to see directly the meetings of today. General information is given, such as the date and time when the meeting will be held, duration, name of the meeting, attendees.

2.1 Schedule a Meeting

Inside the Meetings tile, the user can click on the plus blue button on the top right corner (top bar) to schedule a new meeting. Doing so, we display a popup with the following information: Name (mandatory field), date, time, duration, status, desired results/output of meeting and the action buttons 'cancel' and 'create'.



2.2 Meeting status

Organizing a meeting can be seen as a mini-project. In particular when your meetings have a more formal character it is important to close off each phase of the meeting correctly. You start by making a draft agenda, which you share with your participants of the meeting or other stakeholders. You can offer them the opportunity to make suggestions. Then you publish your agenda to your invitees and other stakeholders. The same process can be adopted when you publish your meeting minutes: first you publish your draft minutes for review, then when all agree you can publish your minutes.

Meeting Status Bar

At the top of the meeting popup, you'll see the Meeting Status Bar.
This bar shows the different stages of a meeting, from **Agenda Draft** all the way to **Archived**.

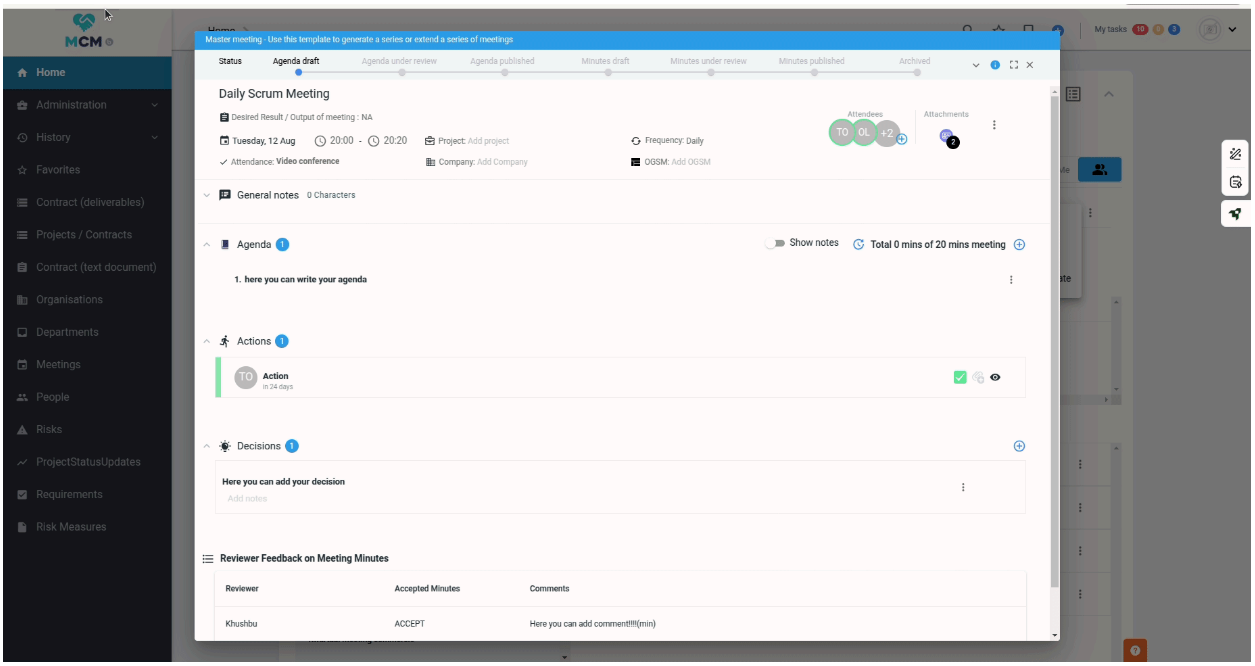
You can also change the status directly from here.

Example: Once your agenda is ready, move it from **Agenda Draft** → **Agenda Under Review** → **Agenda Published**.
Later, when minutes are prepared, you can move them through **Draft** → **Review** → **Published**, and finally **Archived**.

Status of the meeting is an optional field. The list allows you to choose the specific status

Statuses of a meeting are:

- AGENDA DRAFT - Prepare the first version of the agenda.
- AGENDA UNDER REVIEW (for comments/ suggestions) - Collect feedback and approvals from reviewers.
- AGENDA PUBLISHED - Final agenda is visible to all attendees.
- MINUTES DRAFT - Record the first version of meeting notes.
- MINUTES UNDER REVIEW (for comments / suggestions) - Reviewers can add comments, edits, or approvals.
- MINUTES PUBLISHED - Final minutes are confirmed and shared with everyone.
- ARCHIVED - Meeting is formally closed and stored for future reference.



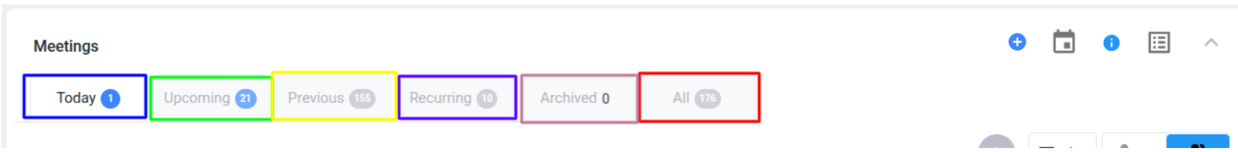
Why Do We Need Meeting Status?

Meeting Status acts like a roadmap for your meeting. It shows where things currently stand, what comes next, and ensures that nothing is missed.

Here’s why it’s important:

- **Clarity for Everyone** – Attendees instantly know whether they are looking at a draft, something under review, or finalized minutes.
- **Structured Workflow** – Meetings follow a proper step-by-step lifecycle (Draft ⟶ Review ⟶ Published ⟶ Archived), just like a project.
- **Accountability & Transparency** – Each stage has a clear purpose, so it’s easy to track responsibilities and know who needs to act next.
- **Better Collaboration** – Review stages allow participants to share feedback, suggest edits, and approve before moving forward.
- **Future Reference** – Once a meeting is archived, it’s stored in an organized way for easy access later.

In short, Meeting Status keeps meetings structured, transparent, and easy to follow—avoiding confusion while building a clear history of every meeting.



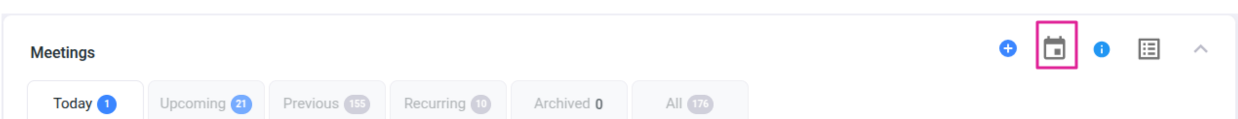
Depending on the date, the meeting will be shown in the specific tab as explained below:

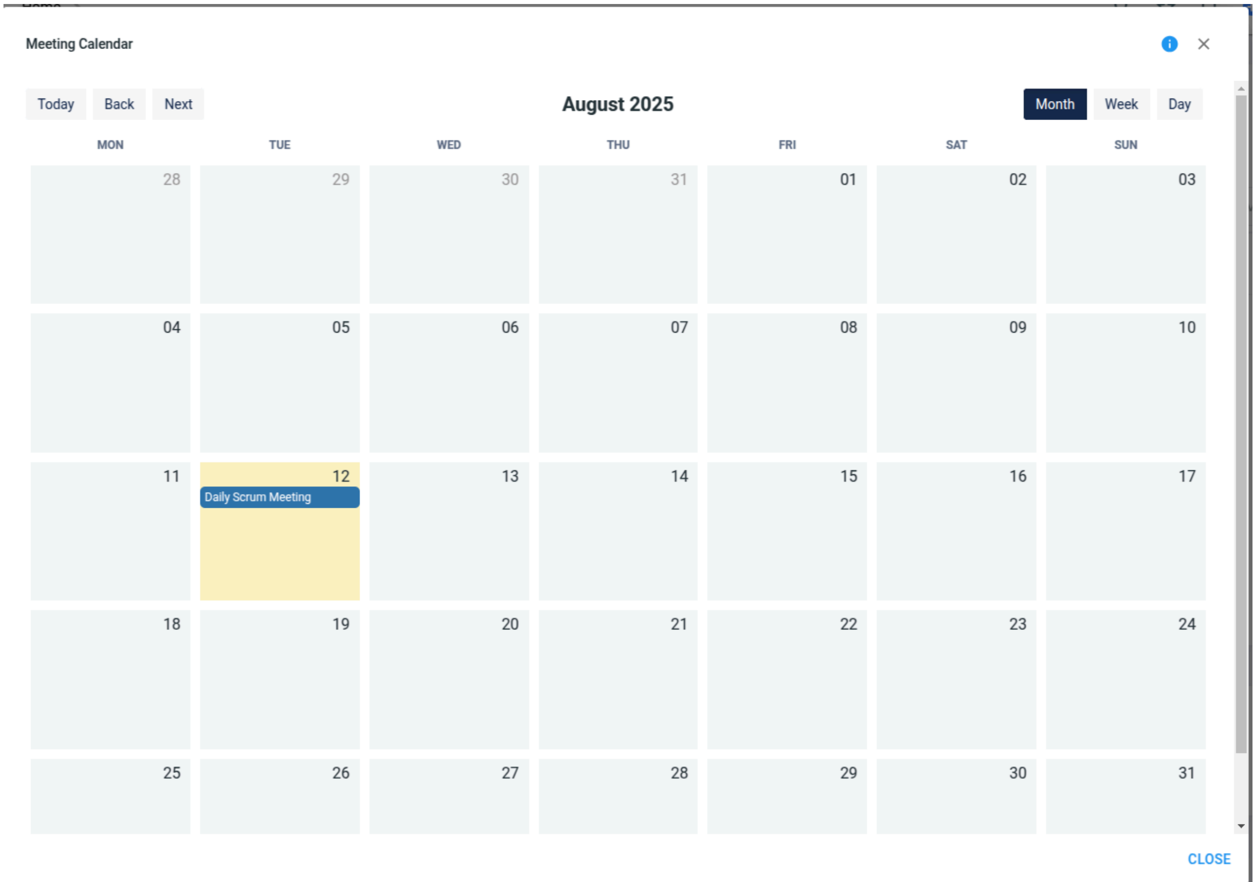
- Today: In this tab are shown all the meetings that have the today date
- Upcoming: Here are present all the meetings that have been scheduled for later today or a day bigger than today
- Previous: Are shown all the meetings that have happened before
- Recurring: In this tab are presented all the meetings that have repeated meetings
- Archived: A complete record of past meetings, including agendas, minutes, actions, decisions, and attendees, is available for viewing in the archived meetings section.
- All: Here we have all meetings listed inside other tabs (Today, Upcoming, Previous and Recurring) are listed here.

From the list you can add attendees and also upload an attachment if necessary. When adding an attendee, if the person you are searching is not listed, it is probably because this person is not added yet in your workspace. By clicking on "Create <name being typed>" it is possible to create a new person or user directly from there.

2.3 See your Your Calendar View

Next to the '+' button it is the calendar icon. By clicking on the calendar you are able to see all the meetings of the month/week and day in a very structured way.





The yellow color is the current date. This way you have a panoramic view of the agenda.

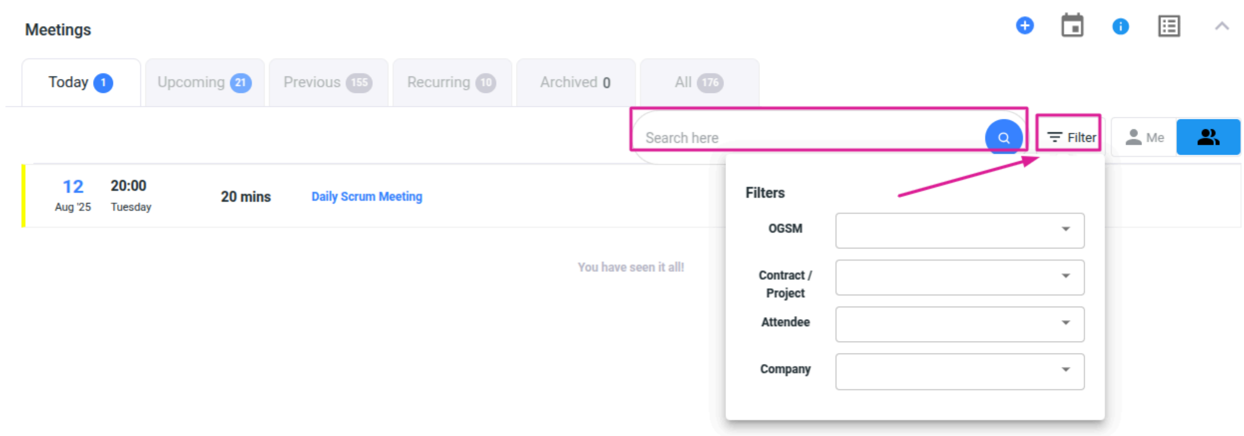
2.4 List Page

You can find this Icon next to the '+' , calendar Icon and Manual. This button sends you to the 'Meetings list' where you can add/delete or edit meetings.

2.5 Search by meeting tile, filter & Icons of people

To simplify your work you can search by the meeting name so it is easy for you to access the specific meeting that you are looking for.

The three Icons allow you to filter by only meetings you will attend or all the meetings created regardless of the attendees and by selecting specific OGSM, contract/project, attendee & company.



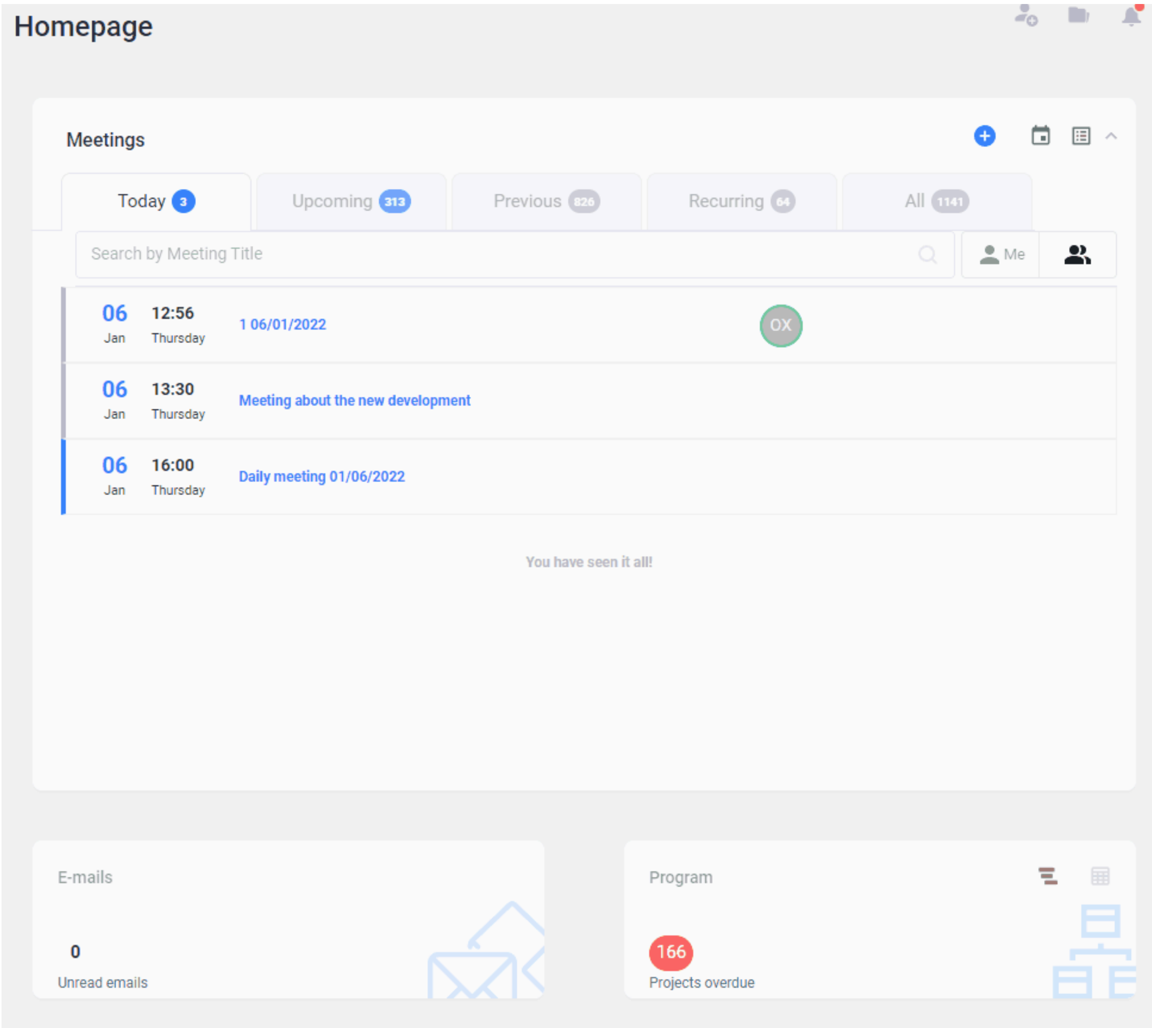
2.6 Add an attendee to the meeting

You can add an attendee in the meeting by searching the name registered in the software. When you start typing an attendee name, the autocomplete will propose a list of names so you can choose one.

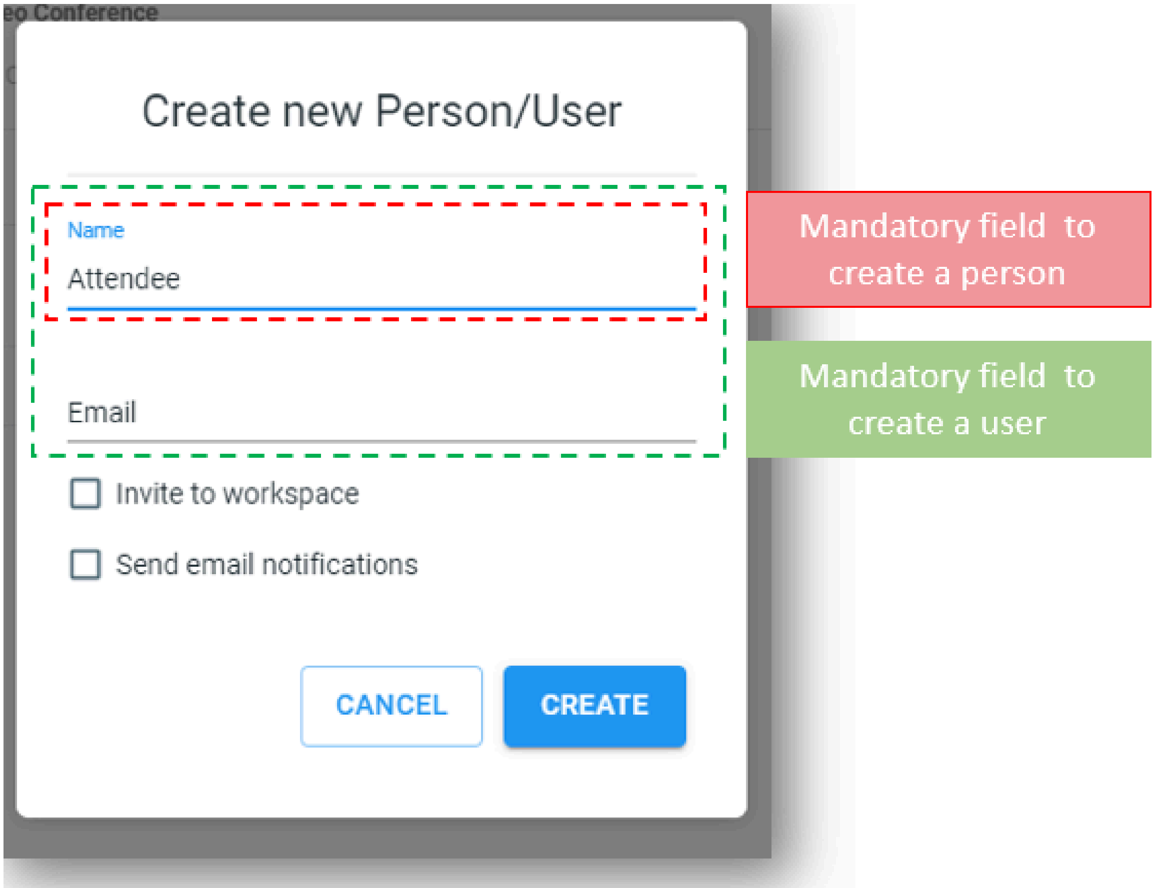
In one meeting there can be as many attendees as you want.

2.6.1 Create a person/user

The creation of a person/user in the meeting can be done from the list of meetings, by hovering the mouse over the line, or in the detailed meetings.



If you want to create a person you can fill the field name and save the changes, if you want to create a user then you should also complete the email field.



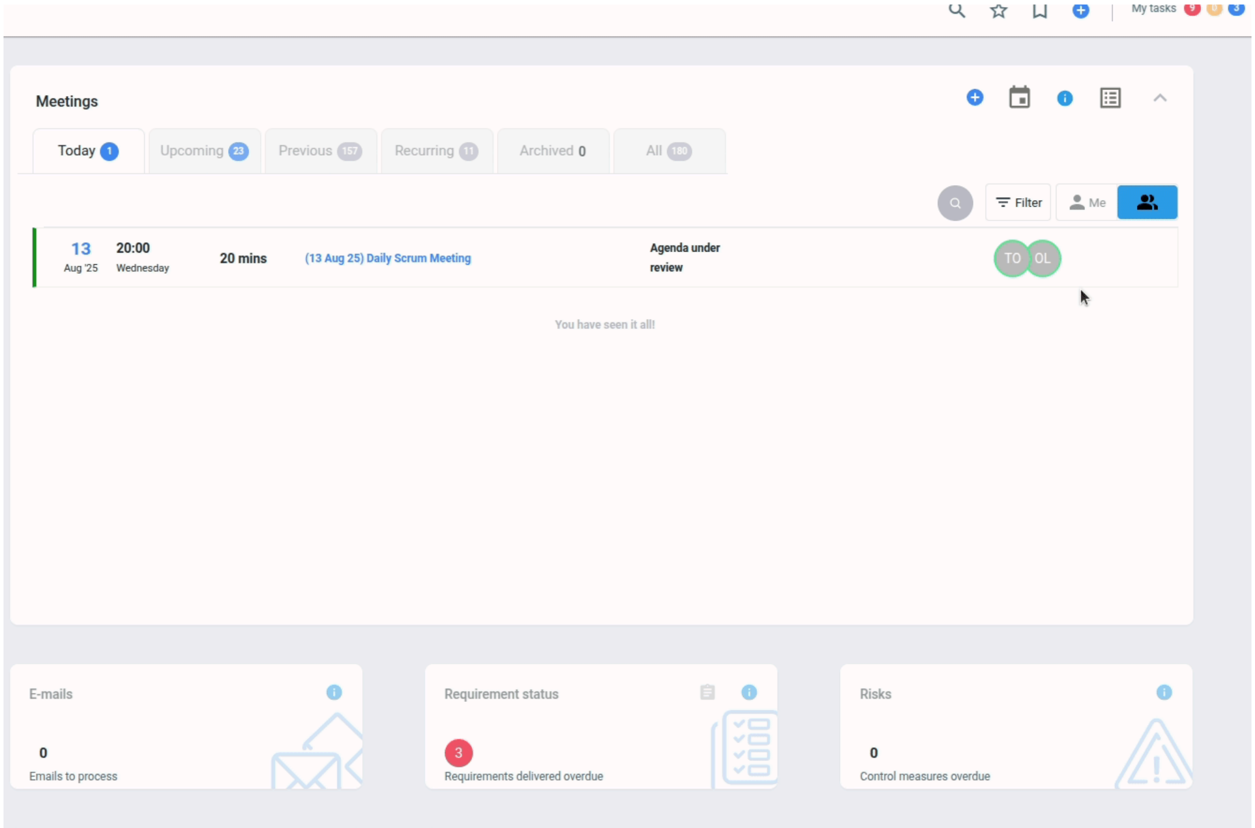
There are also 2 options when creating the user. You can invite this user to the workspace or simply send email notifications. After creating this person/user it will be an attendee of the specific meeting we created it.

2.6.2 Adding User/Person by clicking on existing attendee

You can also add new participants directly from the meeting list.
To do this, click on the attendee icons (profile pictures or initials) already shown for the meeting.
A participant window will open, where you can:

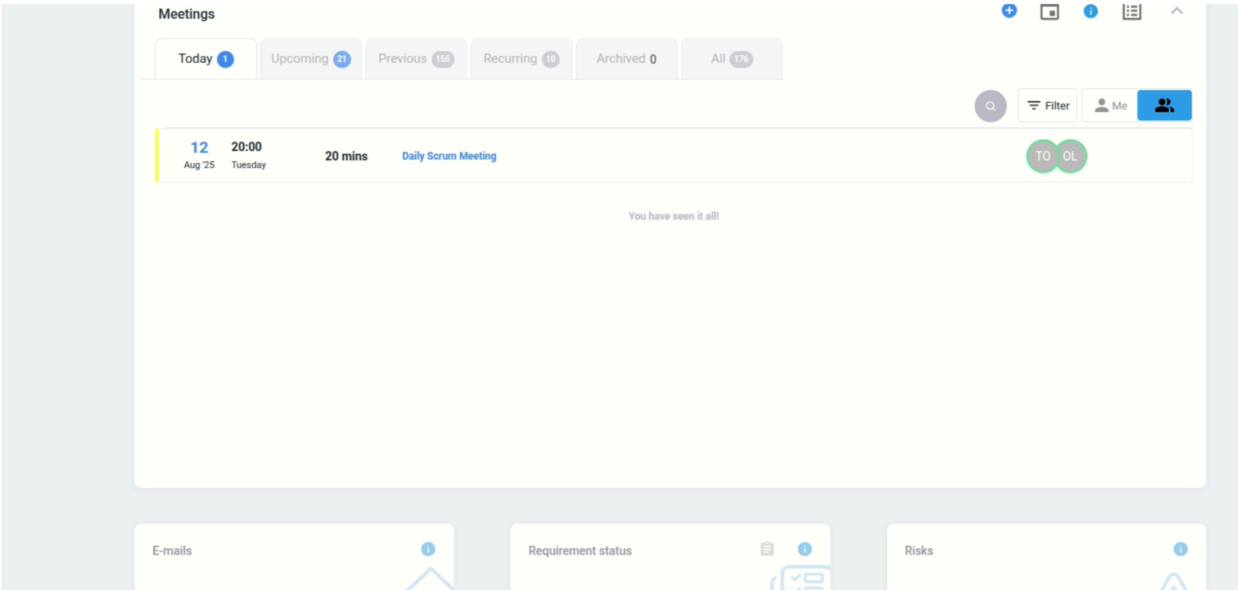
- Search for the person you want to add
- Select their name from the list
- Confirm to add them as a meeting attendee

This method provides a quick way to update participants without opening the full meeting details.



2.6.3 Update information of an attendee in the meeting

You can change attendee information from the meetings list or inside a specific meeting.
This can be done by clicking on the name of the person, clicking in the arrow next to the person image and a small popup will appear.



For the specific attendee you can change the role, status, activate/deactivate 'Minutes Reviewer' or 'Agenda Items Reviewer' and by default invited and attended is selected,you can exclude also.

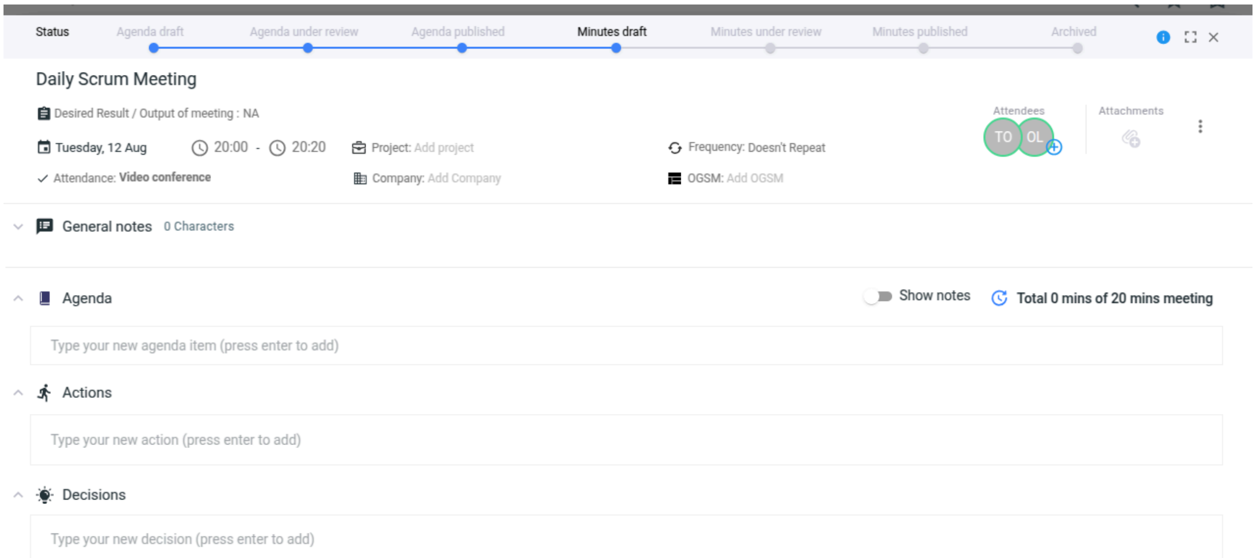
The attendee is initially required as a participant but you can change the role to:
- Chair
-Required
-Optional
-Non participant

Status is also 'Accepted' initially but also this is an information editable:
-Accepted
-Declined
-Delegated
-Needs action

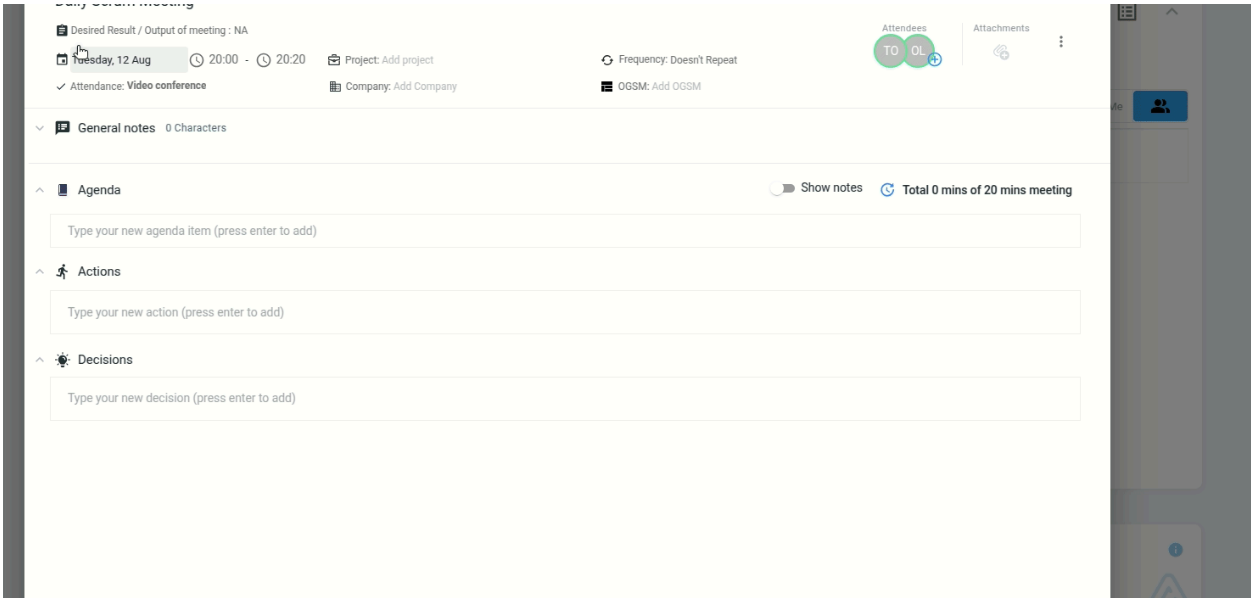
2.7 Your Meeting in detail

You can open the meeting details by clicking in the row of the existing meeting.

Our meeting popup right after creating a meeting should look like this:

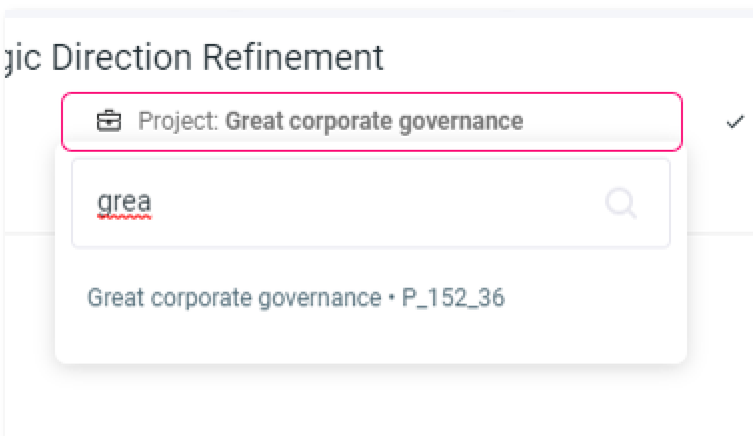


You are able to change the date and time of the meeting. This can be done by clicking on the date below the name of the meeting and next to it in the time. By updating the date the duration will also change the position of the meeting in the tab.



There are plenty of other features that help you keep track of everything.

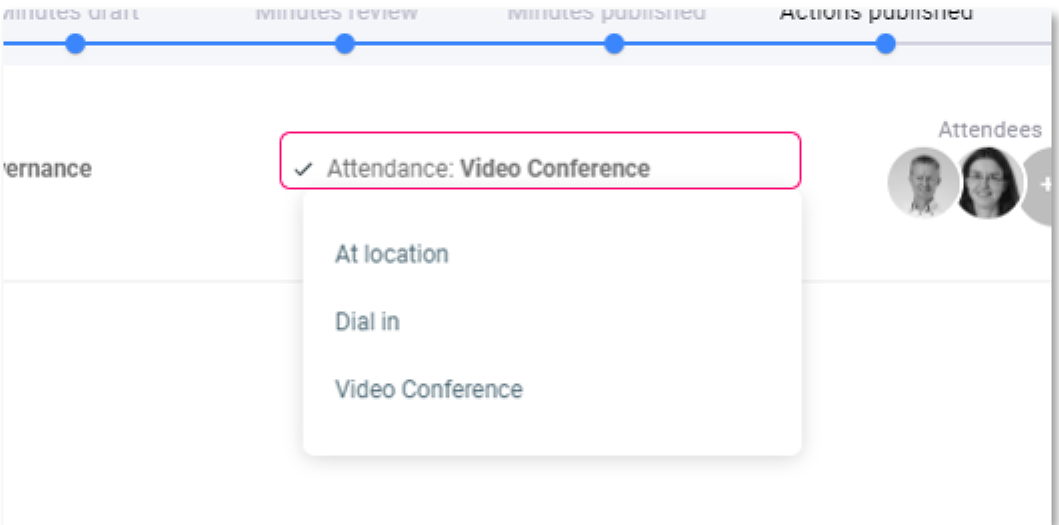
- **Project:** You can choose the project by clicking on the specific field and searching if the project exists or if not, you can create a new one.



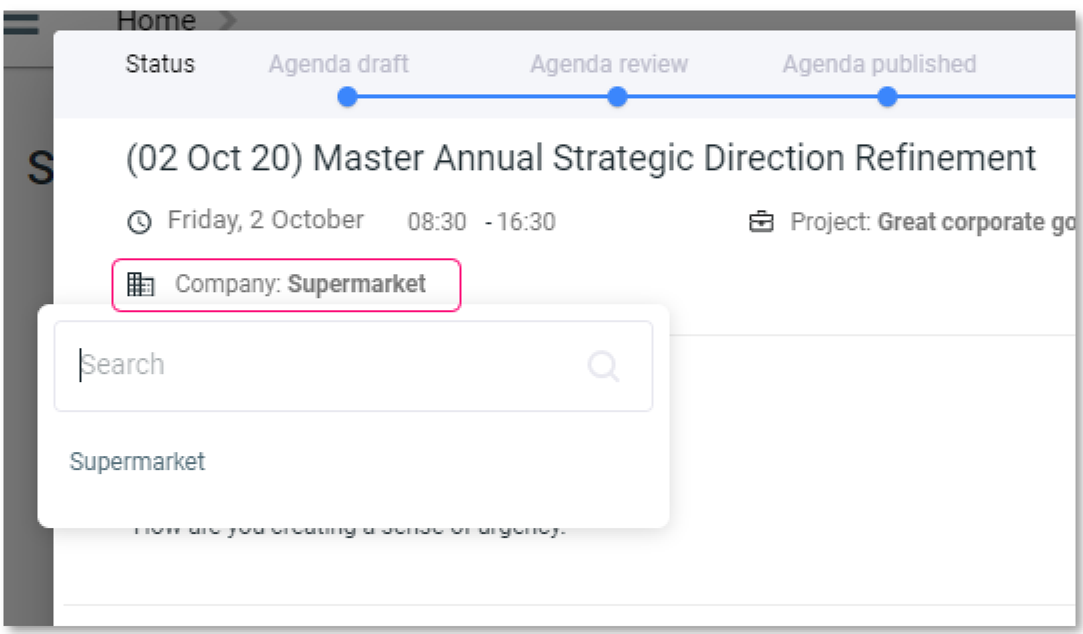
The list with all the projects created will appear giving you the possibility to choose one directly from the list.

- **Attendance:** From statistics most meetings are attended online and that is why we directly propose the attendance in 'Video Conference' by default. But you can choose where the attendance is held. The options are:
  - At location

- Dial in
- Video Conference



- **Company:** You can choose which company this meeting is related to. Same behavior as the project. You can choose a company from the list, and if it does not exist you can create one directly from there.

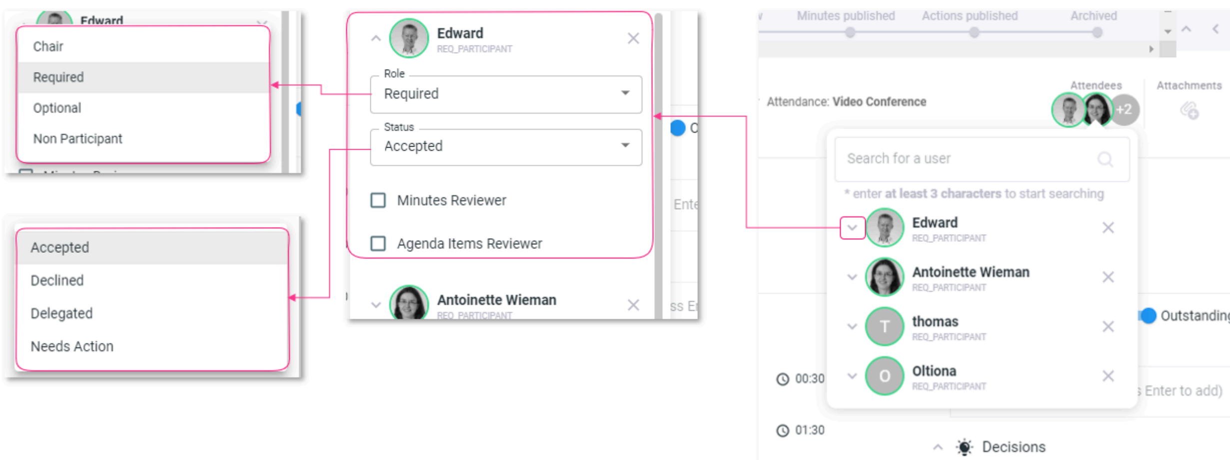


2.7.1 Attendee roles

You are allowed to add as many members as this meeting with different roles.
Click in the Attendees field and search the attendees.

Every attendee should have a role in the meeting. When choosing a participant our software creates this person as a required participant. This role can be changed by putting the specific importance of the role.

We have four different roles of attendees:
- Chair
- Required
- Optional
- Non participant



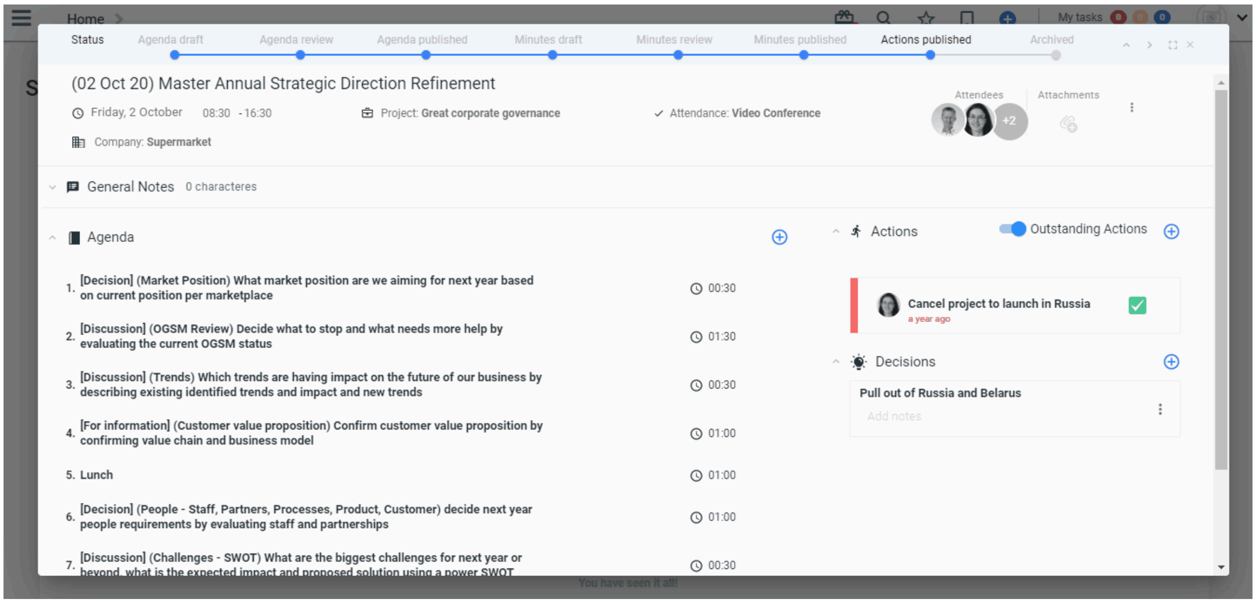
The statuses of the attendees are:

- **Accepted**- If the attendee has accepted the meeting, the circle of the member becomes green
- **Declined**- If the attendee declines to participate in the meeting, the circle of the member becomes red
- **Delegated**- If the attendee chooses the status ‘Delegated’ the circle of the member will become black
- **Needs action**- If the attendee has not yet responded to the meeting invitation, the circle of the member remains gray.

2.7.2 Just documenting a meeting that already took place?

If the meeting has already finished and this meeting is created only to write down the general notes we offer a specific field to write general notes about this meeting.

You have many options to emphasize some parts of notes and this way in the printing page you will have everything set as you want.



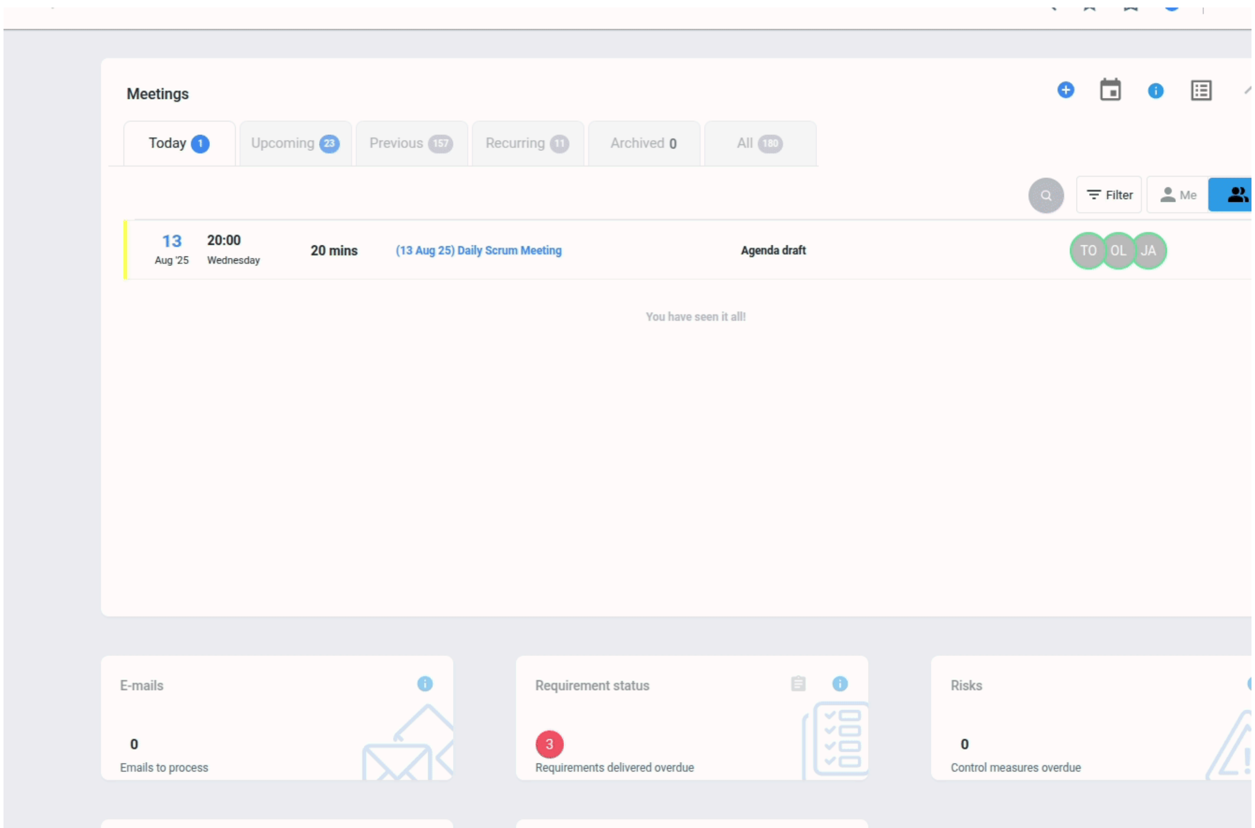
2.7.3 Viewing Notes in Detail Using the Show Notes Option

To view your meeting notes, first click on the meeting you have created.
A meeting popup will open, and near the agenda section you will see the **Show Notes** toggle.

- **For Agenda (Draft, Under Review, and Published):**
  You can use the Show Notes toggle to control the visibility of notes.
  - **Toggle ON:** Notes related to each agenda item will appear in detail below it.
  - **Toggle OFF:** Notes will be hidden, giving you a cleaner view.
- **For Minutes (Draft, Under Review, and Published):**
  Notes will remain **visible by default** and cannot be hidden. The toggle will not apply here.

- **For Archived Meetings:**
  Notes are **hidden by default**. If you want to see them, simply turn the Show Notes toggle ON.

This way, you can easily switch between a **summary view** and a **detailed view** for agendas and archived meetings, while minutes will always show notes to ensure full visibility.



2.7.4 Dynamic meeting coloring

The meeting color feature is designed to help you quickly understand the status and progress of your meetings. Based on certain conditions like how far the meeting is scheduled, whether agenda items or attendees are added, or if the meeting is archived, a specific color is assigned. This visual indication makes it easier for you to manage and prioritize your meetings without needing to open each one individually.

When the meeting is more than 2 days away

- **Grey**: You haven't added any attendees or agenda items yet.
- **Yellow**: You've added either attendees or agenda items, but the meeting is still in draft.
- **Green**: The meeting is confirmed or finalized.
- **Blue**: The meeting is already archived.
- **Red**: Not used in this case.

When the meeting is exactly 2 days away

- **Red**: No attendees added.
- **Yellow**: Meeting is still in draft.
- **Green**: Meeting is confirmed or finalized.
- **Blue**: Meeting is archived.
- **Grey**: Not used here.

When the meeting is happening right now

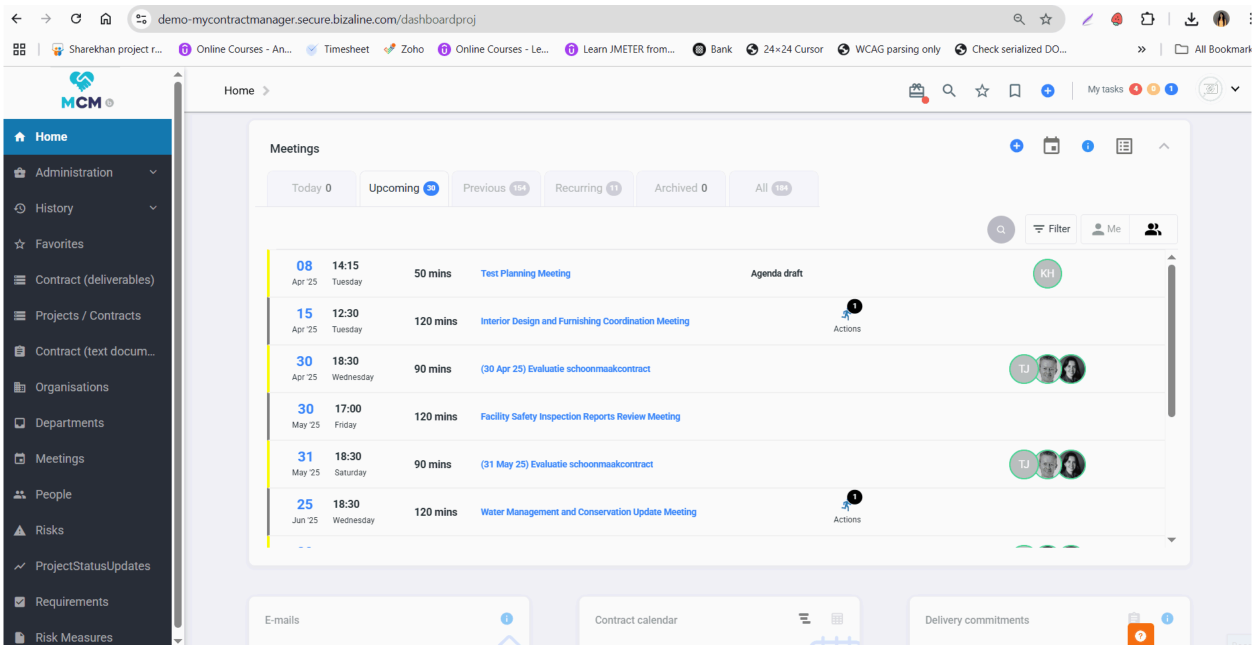
- **Red**: Meeting is still in agenda stage (not started minutes yet).
- **Yellow**: Minutes have been started but not finished.
- **Green**: Minutes are under review or already published.
- **Blue**: Meeting+ is archived.
- **Grey**: Not used here.

When the meeting ended less than 2 days ago

- **Red**: Meeting stayed in agenda stage and was not completed.
- **Yellow**: Minutes were started but not finished.
- **Green**: Minutes are under review or published.
- **Blue**: Meeting is archived.
- **Grey**: Not used here.

When the meeting ended more than 2 days ago

- **Red**: Minutes were never completed.
- **Yellow**: Minutes are under review.
- **Green**: Minutes are published.
- **Blue**: Meeting is archived.
- **Grey**: Not used here.



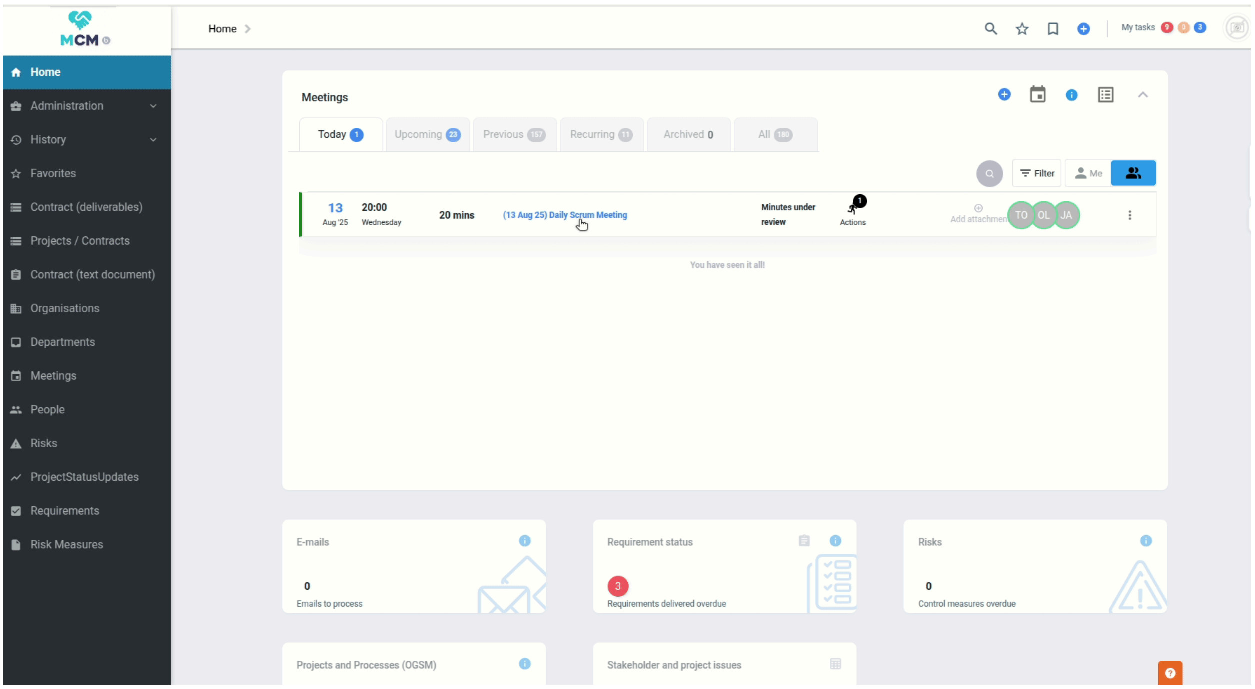
2.7.5 Viewing in Full Screen Mode

Full screen mode allows you to focus entirely on the meeting content without any side distractions. This feature is especially useful when you want a clear, uninterrupted view of the agenda and discussions.

You can enter full screen mode in two simple ways:

1. **From the Meeting Popup**
   - Open the meeting details popup.
   - Look for the **full screen icon** (usually in the top-right corner).
   - Click it to expand the meeting view into full screen.
2. **From the Agenda Section**
   - Go to the agenda section of your meeting.
   - Find the **full screen icon** next to the agenda.
   - Click it to switch the agenda into full screen view.

Once in full screen, all unnecessary menus and panels are hidden, giving you a clean layout focused only on the meeting details. You can easily exit full screen by pressing the **Esc** key or clicking the **exit full screen** icon.

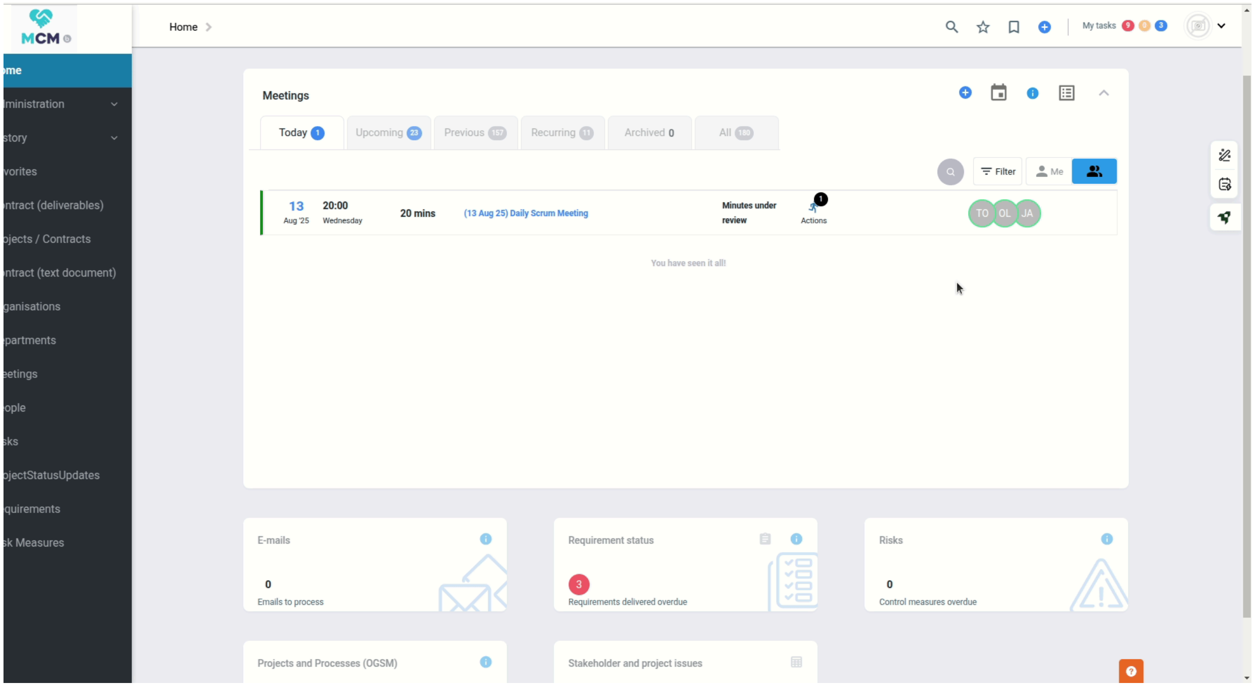


2.7.6 Dynamic Attendee Status Color Indicators in Meetings

The color ring around a user's profile picture indicates their meeting status:

- **Accepted:** Green ring
- **Declined:** Red ring
- **Delegated:** Black ring
- **Needs Action:** Blue ring

This visual cue allows for quick identification of each attendee's current status.

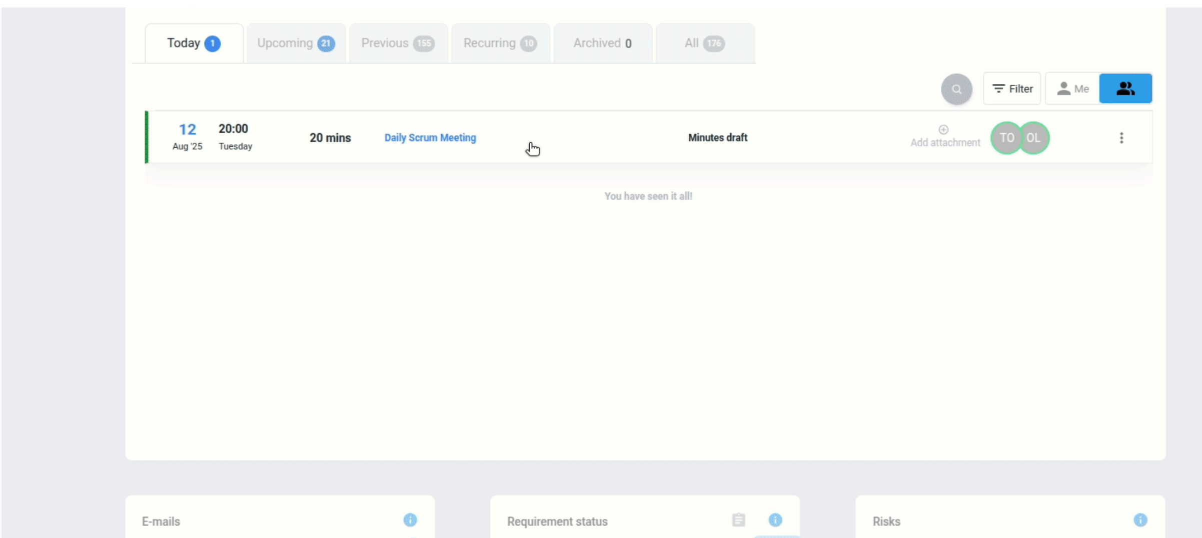

Home
Meetings
Today 1
Upcoming
Previous
Recurring
Archived 0
All
Filter
Me
13
Aug '25
20:00
Wednesday
20 mins
(13 Aug 25) Daily Scrum Meeting
Minutes under review
Actions
You have seen it all!
E-mails
0
Emails to process
Requirement status
3
Requirements delivered overdue
Risks
0
Control measures overdue
Projects and Processes (OGSM)
Stakeholder and project issues

3. Creating your meeting agenda & notes

3.1 Creating Agenda Items 📕

In every meeting it is suggested that you create your Agenda items. You can create as many agenda items as you want. Once you create one, only by clicking enter it will be saved and automatically create a next item ready to be added

For the Agenda Item you can:
- write down notes
- add minutes
- attach files,links and images(It is also possible to attach this all in meeting tile)



Availability of Notes and Minutes

- **Future and Ongoing Meetings:** The system displays the **Add Notes** option only.
- **Past Meetings (Agenda Draft):** The system displays the **Add Minutes** option.

Important: The logic is based on both **date and time** of the meeting.

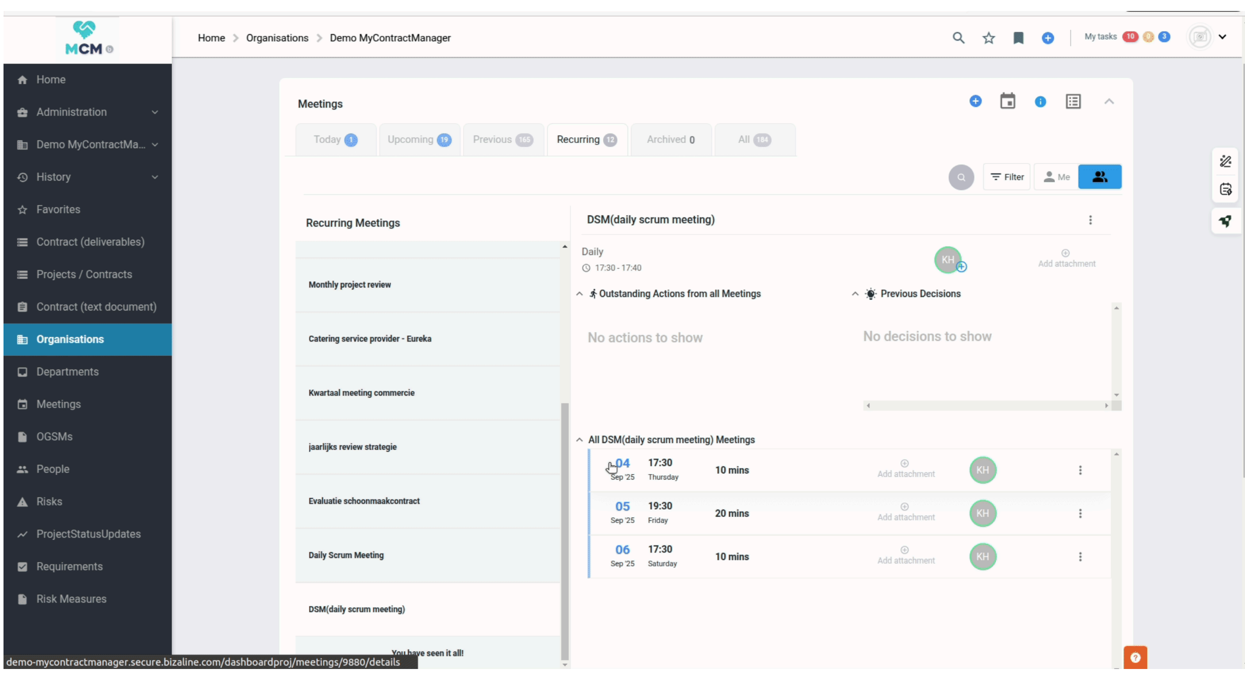
Example:
Refer to the Recording below for clarification:

Date	Current Time	Status	Options available
4 Sep’25	18:00	past(if current time>17:30)	Add Minutes
5 Sep’25	19:30	future(if current time<19:30)	Add notes
6 Sep’25	17:30	Future(if current time<17:30)	Add notes

If today is **5th September** and the current time is **5:30 PM**:

- The **17:30 meeting on 5th Sept** is **past**, so it will show **Add Minutes**.
- The **19:30 meeting on 5th Sept** is **future**, so it will show **Add Notes**.

Tip: This ensures participants capture notes during live or upcoming meetings and finalize discussions as minutes only after the meeting time has passed.

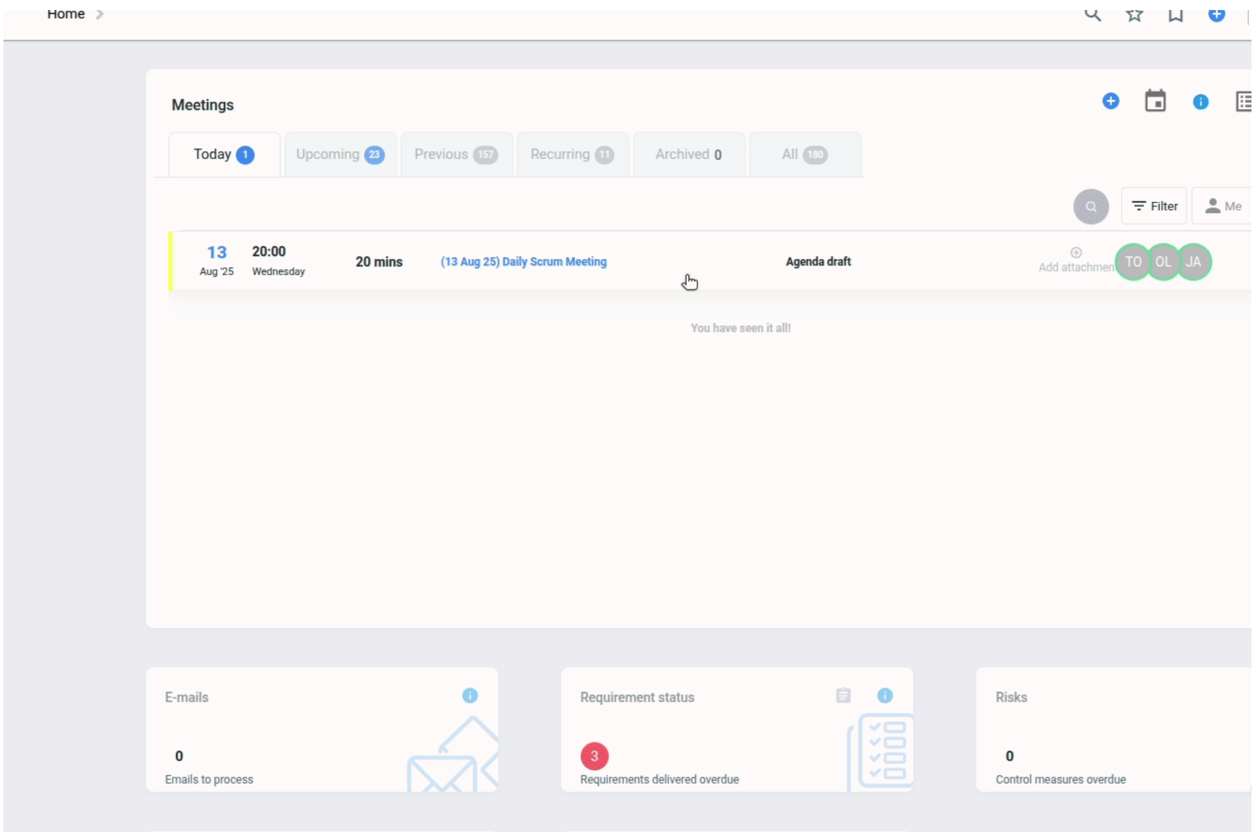


3.2 Adding a Sub-Agenda to Your Agenda

After creating your main agenda item, you can break it down into smaller points by adding a sub-agenda.

To do this, just hover over the agenda item and you'll see an option to add a sub-agenda, or you can click the "+" button next to it. Once you add it, type in the title or details, and it will show up slightly indented under the main agenda item.

This makes your agenda look more organized and helps you cover every point without missing anything.



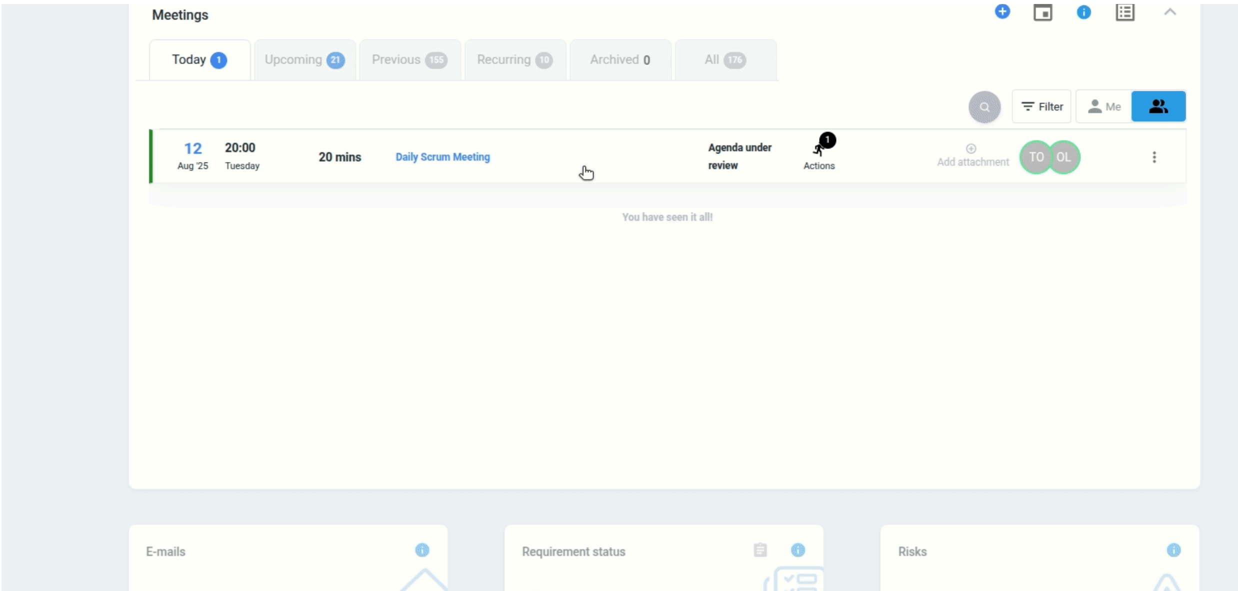
3.3 Documenting your Actions 🏃

We call a meeting successful when we are able to take actions and decisions from the discussion.

You can create an action by hovering the mouse over the action field and type the actions taken. After you have done this in the eye icon you can add more information about the action.

By doing this we integrate your action in the specific kanban so you know the status, priority, client etc.

Example:



After you create the action and associate it with a project and/or a project sprint, we will be able to see the action in the right project sprint with the status of it.

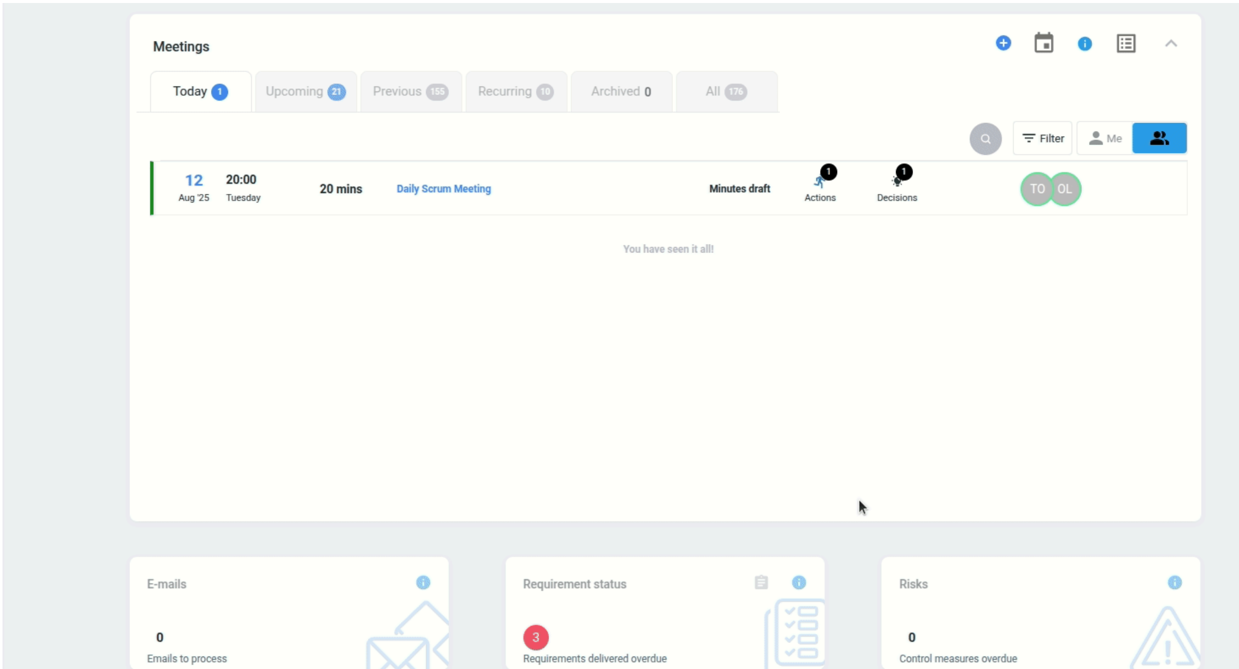
We can track the progress of the action from the meetings but also from the Kanban

- You can reorder actions by using the drag and drop icon
- Done You can set the action as done by clicking on the kebab menu and 'Done'
- You can assign this action to a person by clicking on the 'Person' icon and searching by the person's name.
- Also by selecting show in gant and milestone task option you can easily see this all as your milestone progress & as a chart

3.4 Document your Decisions 🌟

This section is below the Actions.

You are allowed to create decisions for this meeting and leave notes for every decision.



Just click enter and you can create a new decision easily.Also you can edit the decision by clicking ⋮ on kebab menu . While editing, you can:

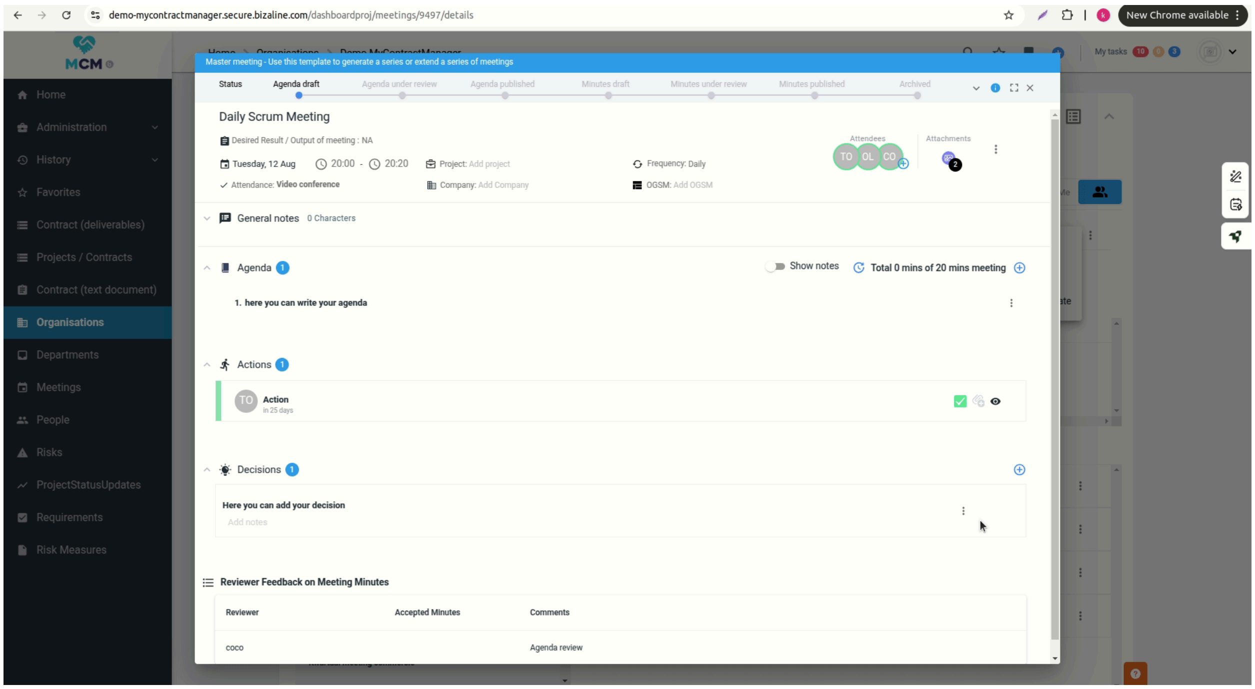
- Add or update the **name of the decision**
- Select the **company, project, and department**
- Link the decision to a specific **agenda item**
- Link related **requirements**

How to do it:

1. Go to the decision you want to edit.
2. Click on the **three dots (⋮)** menu.
3. Select **Edit**.

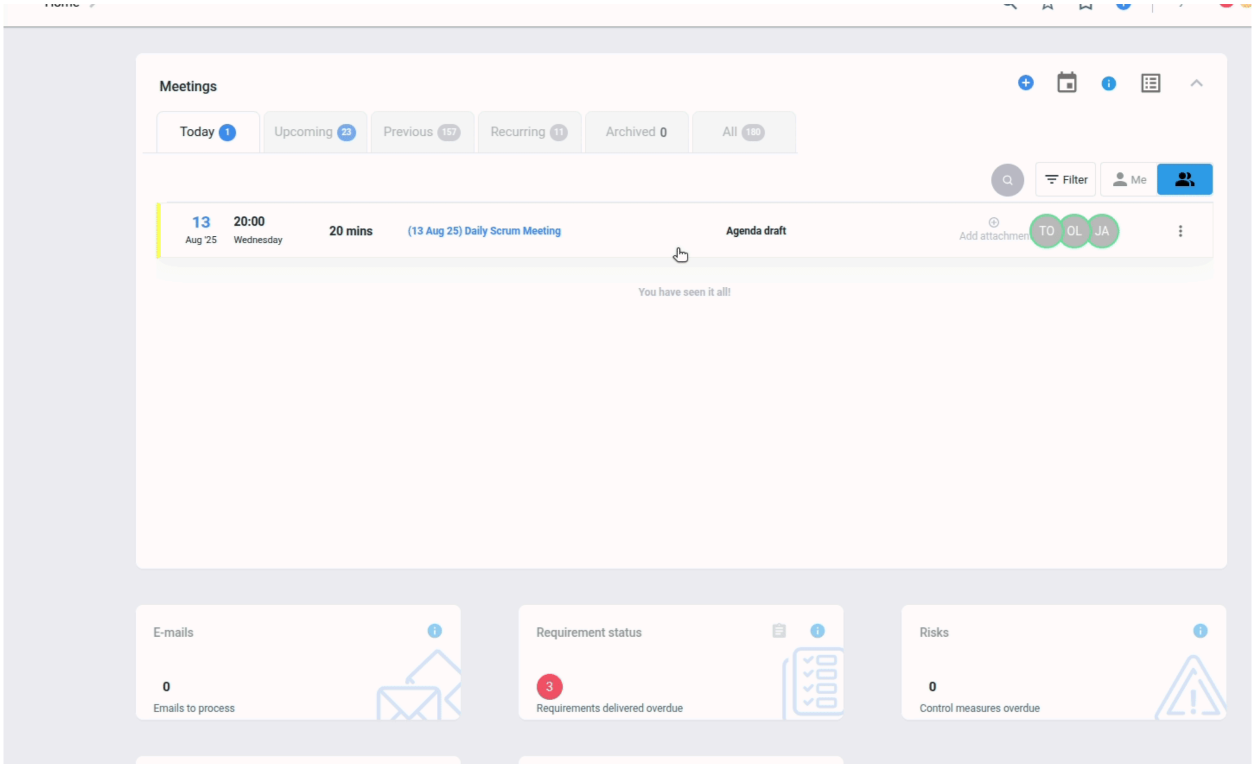
4. Update the details as needed, then **Enter**

This ensures that decisions are clearly documented and properly linked to projects and agendas.



3.4.1 Viewing Decisions Using the Toggle

When it is **off**, the decision list will be hidden for a cleaner view.The "Show All Decisions" toggle allows you to control the visibility of recorded meeting decisions. When enabled, all decisions are displayed in detail; when disabled, the decision list is hidden for a cleaner view.


Meetings
Today 1
Upcoming 23
Previous 157
Recurring 11
Archived 0
All 188
Filter
Me
13
Aug '25
20:00
Wednesday
20 mins
(13 Aug 25) Daily Scrum Meeting
Agenda draft
Add attachment
TO
OL
JA
You have seen it all!
E-mails
0
Emails to process
Requirement status
3
Requirements delivered overdue
Risks
0
Control measures overdue

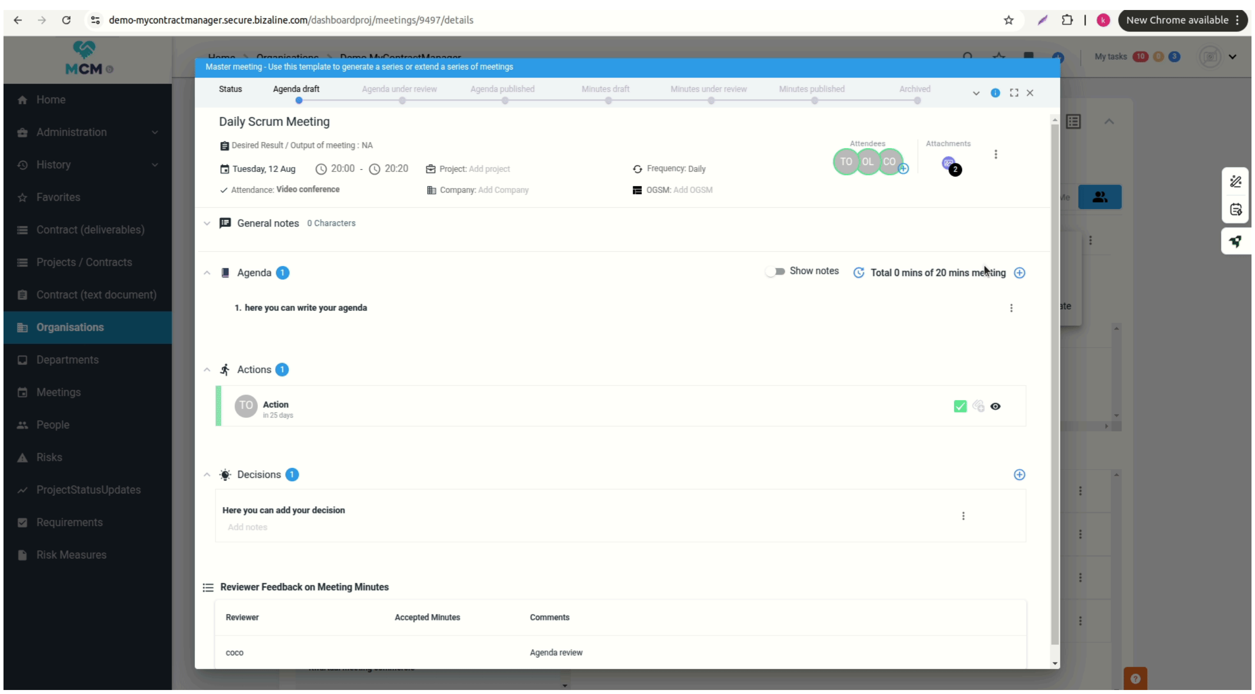
3.5 Linking Projects & Requirements in Agenda

You can easily link a **project** or its **requirements** to any agenda item, helping to connect meeting discussions with actual project details.

How to link a project or requirements:

1. Navigate to the desired agenda item.
2. Click the **three dots (⁝)** menu next to the agenda item.
3. Select **Edit**.
4. In the edit view, locate and select the option to link **project & requirements**.
5. Choose the project or requirement you wish to link and save your changes.

Once linked, all meeting participants can directly access the project or requirement details from the agenda, promoting more effective collaboration.



4. Organizing your recurring Meetings

There is no need to manually create single meetings that occur frequently. Recurring meetings can be set once and our software will automatically create the meetings based on the given information.

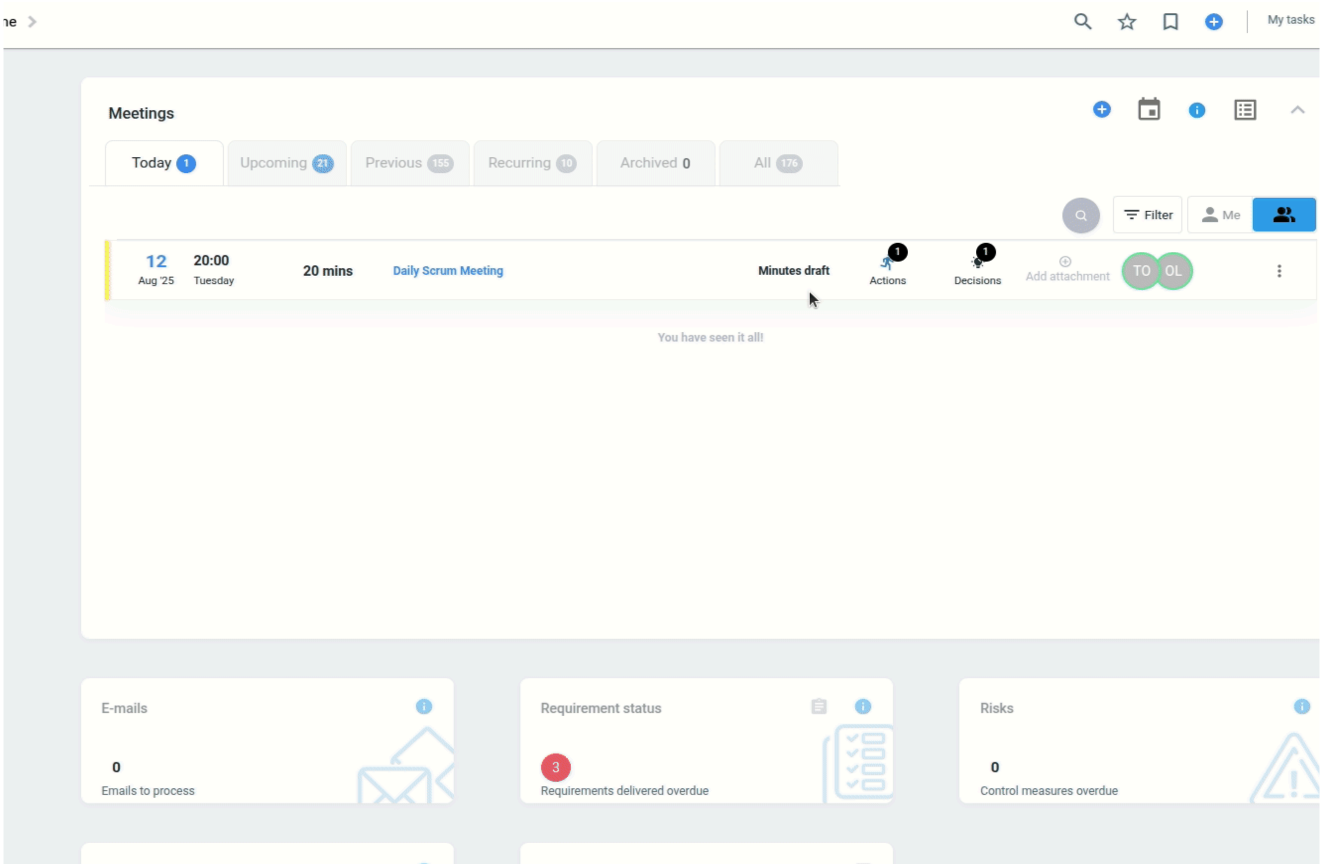
How to turn a meeting into a template?

In order to have repeated meetings that share the same content, we should set the necessary information in order to generate the repeated meetings.When you set a meeting as a template, its recurring instances will have a blue line as their status. This makes it easy to tell them apart from actual meetings.

This can be done in two ways.

Method 1

The quickest way to create a series of meetings is by clicking on the specific meeting where you want to make the generation. After you have created a meeting, there is a field called 'Frequency'. By choosing the frequency of the meeting you will be able to create repeated meetings.



4.1 Scheduling options include:

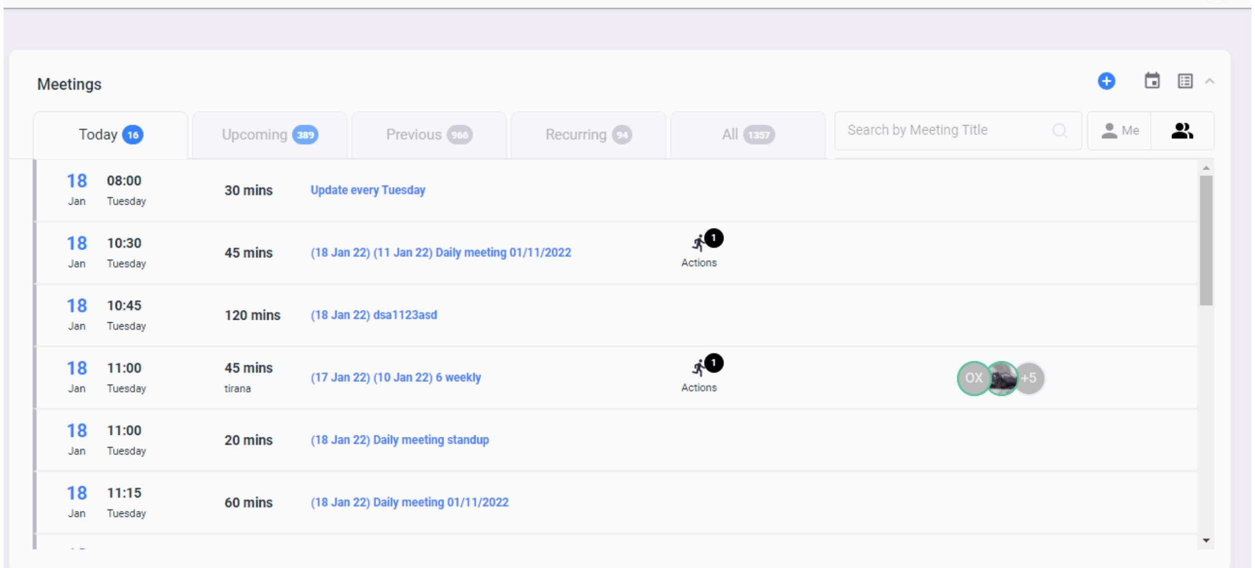
- **Daily**: The task will recur every day
- **Weekly**: Recurs once a week on the day you choose
- **Biweekly:** Recurs once in two weeks on the day you choose
- **Monthly**: Option to recur on the same day each month that you've chosen, a select weekday of the month till the end date.
- **End of Month:** Recurs once a month on the end of the month, beginning with the current month.
- **Yearly**: Recurs once a year on the day you choose
- **Quarterly:** Recurs once in 3 months on the day you choose
- **End of Quarter:** Recurs once in 3 months in the end of the month
- **Quadrimester:** Recurs once in 4 months on the day you choose

- **Half-yearly:** Recurs twice a year in the selected date
- **End of Year:** Recurs once a year on the end of it, specifically on 31 december
- **4 Weeks:** Recurs once in 4 weeks on the day you choose
- **3 Years:** Recurs once in 3 years in the selected date
- **5 Years:** Recurs once in 5 years in the selected date
- **2 Years:** Recurs once in 2 years in the selected date
- **6 weekly:** Recurs once in 6 weeks on the day you choose
- **Custom :** In this option you can customize the Recurrence of the meeting

Right after you choose the frequency, for the generation of a series of meetings, it is requested also the 'Start date' and 'End date'.
Everything will be easy for you because we will make all the calculations on how many meetings should be generated based on the data you have given to us.

*If you have generated this meeting before but you need to regenerate, you have the option to delete the series of meetings generated before.

4.2 Example:Generate weekly meetings on a specific day



If for some reason some information needs to be updated in upcoming meetings, you can update the master meeting and try to regenerate by clicking 'Regenerate future meetings only'. In this way you will be able to update all the future meetings and the previous ones.
Ex: If an attendee has been a participant in this recurring meeting but he is no longer needed in the

meeting, you can remove this participant from the 'Master meeting' and click 'Regenerate future meetings only' by clicking on the 'Frequency'.

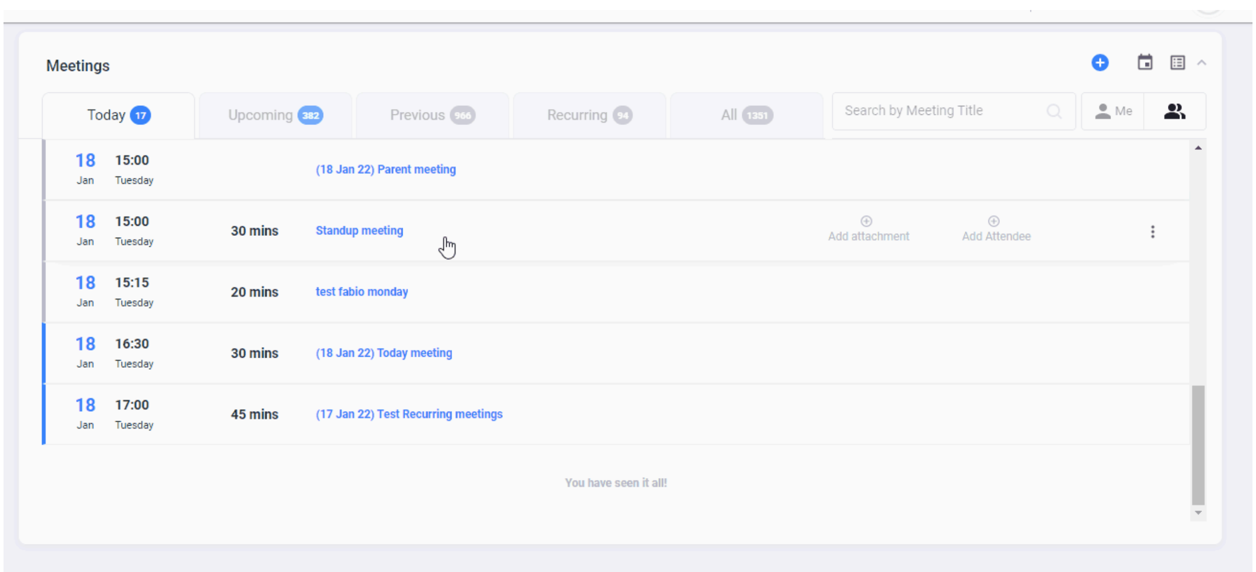
4.3 Custom Recurring meeting

Example: Generate daily meetings skipping weekend days:

You can do this by choosing the frequency Repeat every - 1- -Weeks-

As you click 'Weeks' the new options are shown so you select all the week days you want this meeting to occur.

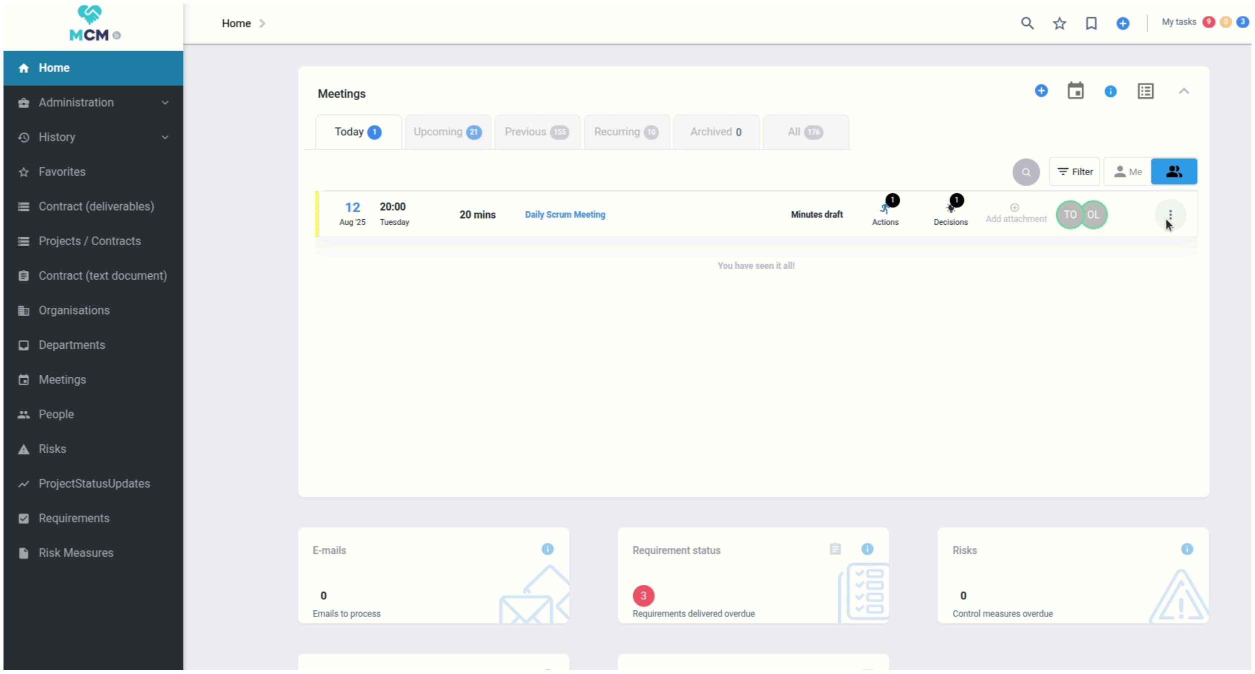
Choose the End date of this meeting and then confirm the data.



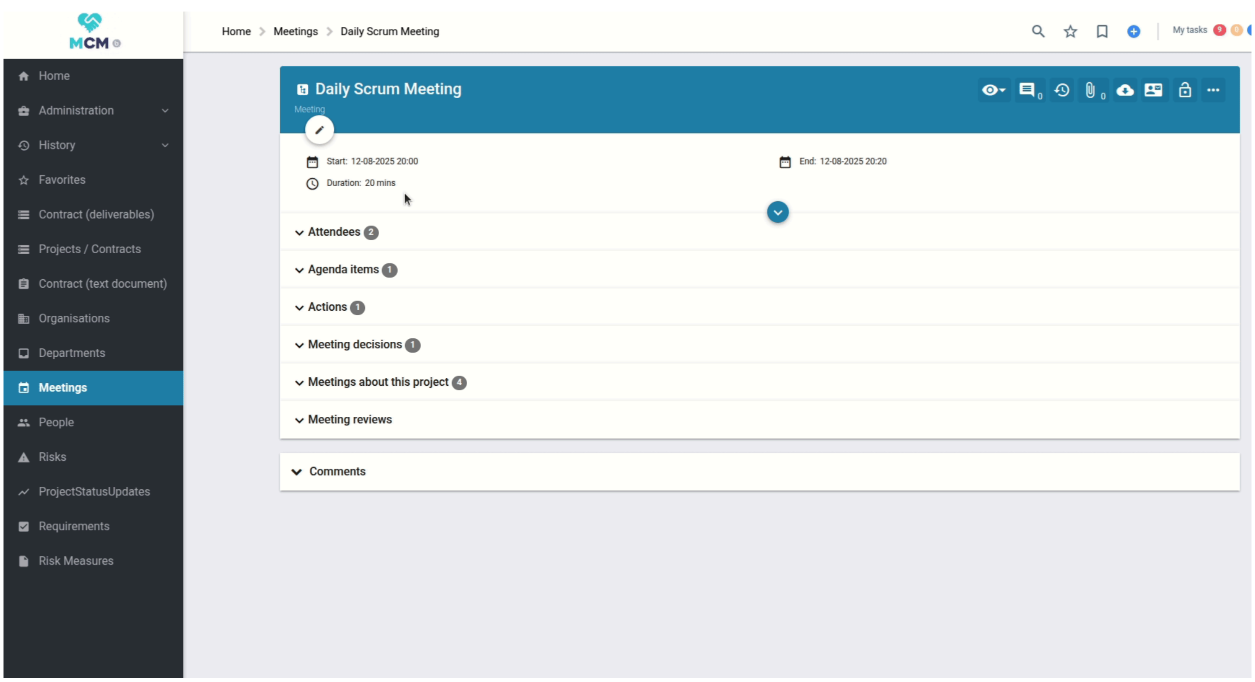
Right after you choose the frequency, for the generation of a series of meetings, you should confirm Start date and the end date. If you have generated this meeting before but you need to regenerate, you have the option to delete the series of meetings generated before.

Method 2 To choose the frequency click on the kebab menu ⋮ of a meeting, Meeting detail and then the fields needed are in the advanced tab.

Step 1: First you have to activate the option ‘Use this meeting as future template’, then define the Frequency and select start and end date for the meeting series:



Step 2: After it, you need to refresh the page and click on the three dots and choose the ‘Series of meetings’ to generate them:



The generated items will inherit from the template the name (with the date in front of it),

attendees, agenda items, duration, notes and so on.
You can edit every information that is given in the generated meetings.

When you are generating a series of meetings, in the pop up of the generation the software will give you the option to choose **‘Delete all existing child meetings before generation?’.** If you choose this option, all the previous generations will be deleted and will be replaced with the new updated ones.

The new meetings will appear in the specific tab, depending on the date of the meeting (Today, Upcoming, Previous), but also in the ‘Recurring tab’.

4.4 How to regenerate the series of meetings after a change in the master meeting.

It is common for recurring meetings to change information. Our tool will help you regenerate the series of meetings with the updated information, so you won’t need to manually update the data.

Below we will explain a real case of a recurring meeting happening in a company:

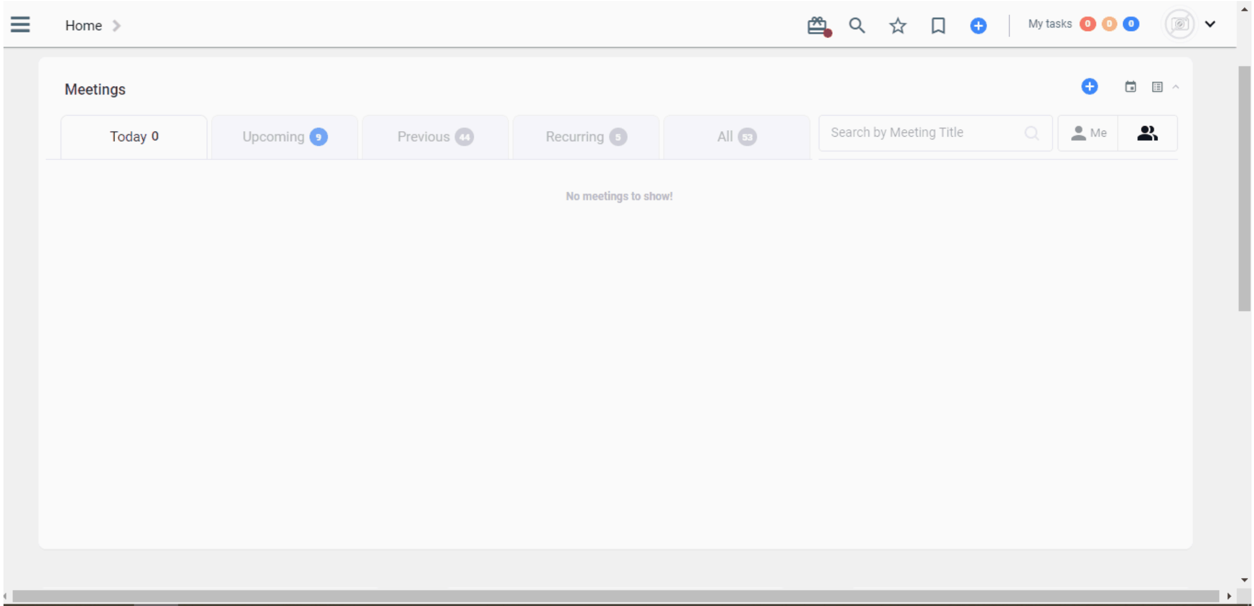
Each month in 2022 we have a meeting with developers discussing the sprint progress where we also discuss impediments.

One of the developers that has been working in the company for more than a year (Fatjon) left the company in July and now we have a new developer (Jasmin). What needs to be done is change in the master meeting the attendees. We remove Fatjon and add Jasmin. After doing so, we can regenerate the series of meetings. Below you will find the example with a gif.

Steps:

- Click in the recurring meetings tab and open the master meeting detail.

- Make the specific modifications and click in the three dots.

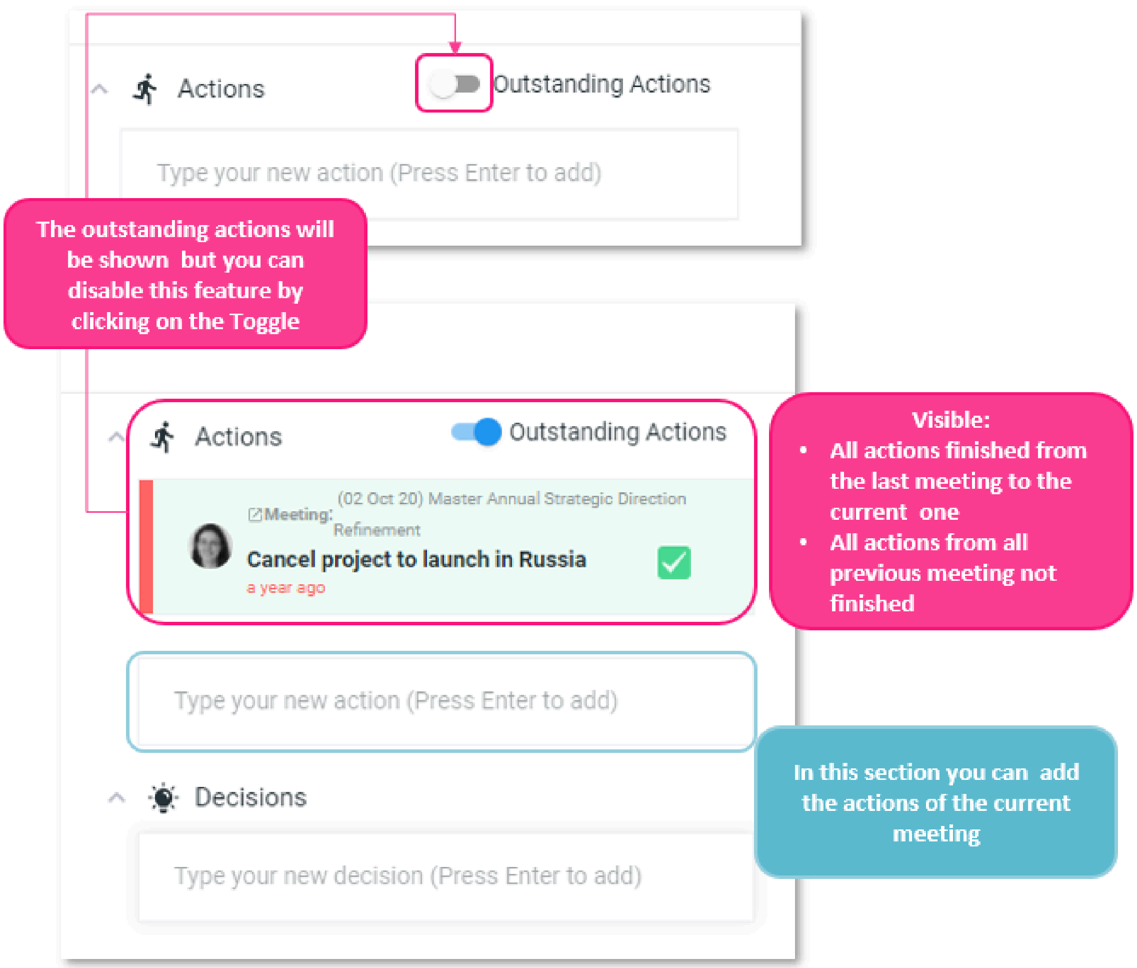


- Regenerate meetings. You have two options:
  - **Delete ALL existing child meetings before generation?**
  - **Regenerate FUTURE meetings only?**

In regenerate future meetings only we can generate only the meetings from the current date till the end date of the recurring meetings.

5. Manage your Outstanding Actions & Decisions

It won't be necessary anymore to check all the meetings one by one and see what actions are not finished. With the new feature 'Outstanding actions' you will be able to watch all the actions from previous meetings that have a status different from 'Done' and also all the actions accomplished from the last meeting to the current meeting. You will save time because there is no need to check all the meetings one by one and see what actions are not finished.



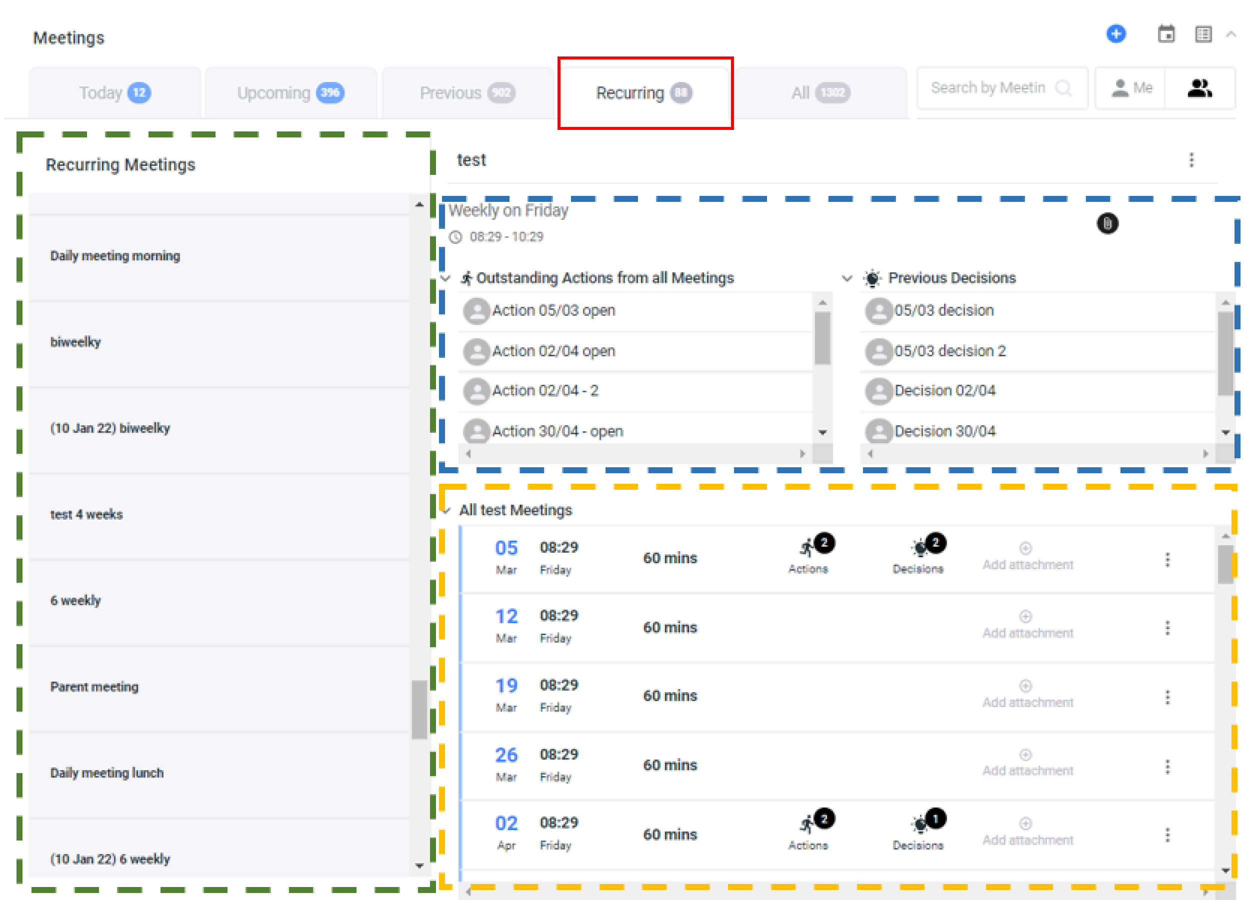
In the outstanding actions you can:

- View the actions in detail by clicking on the '...' and then 'Edit'
- Delete the actions from the previous meetings
- Change status to 'Done' or 'Doing' by checking or unchecking the box

- Go in the parent meeting of the specific action by clicking on the name of the meeting.

5.1 manage outstanding actions & decisions of your Recurring meetings

The recurring meetings will also appear in the 'Recurring' tab



This tab gives you all the necessary information on the first sight. It is divided into three sections.

On the left we have the list of all the recurring meetings and by clicking on one of them, on the right we have detailed information about the specific series of meetings.

On the right, in the upper part we have the information of the all series of meetings (parent meeting), more in detail:

- Name of the meeting
- When the meeting is occurring
- Duration of the meeting
- Possibility to upload attachments if needed directly from the tab

- List of all actions created in all meetings and the assignees
- List of all decisions made in all meetings.

On the right, on the bottom we have the list of all the meetings generated with the specific information:
-Date of the meeting
-Time of the meeting
-Number of actions taken
-Number of decision taken
-Possibility to upload attachments

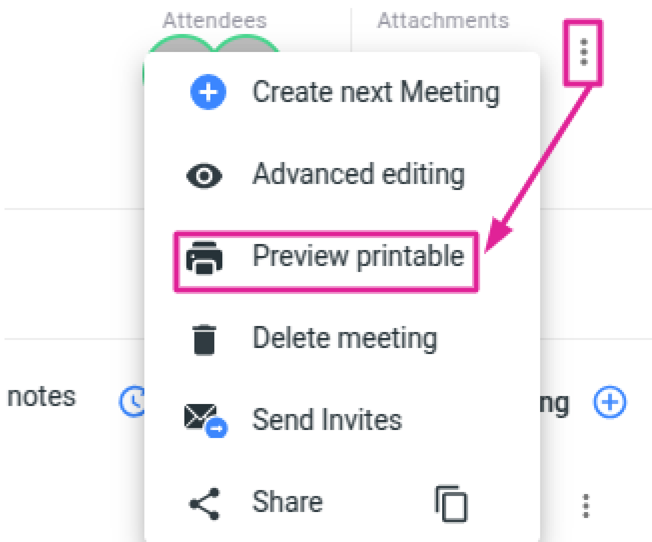
If you click in one of the meetings, a pop up will open and you will be able to see/edit the specific meeting.

The kebab menu ⋮ on the right enables the user to see the meeting details.

6. Send out your meeting minutes (for approval)

6.1 Preview Printable

After you have completed the compilation of the meetings with all the necessary information you can print it in only one page and then send it to the participants or the ones interested in the meeting.



6.2 **Review and Approval Process**

6. 2. 1. Reviewing an Agenda

When the meeting status is **Agenda Draft**, you can send the agenda for review.

- Click on the **3 dots (⁝)** on the top-right of the meeting popup and select **Request Review**.
- Select the person(s) who should review it.
- The selected reviewer(s) will receive an email notification with a link.

- On opening the email, they will see the option to **Review Agenda**.

Reviewers can then:

- Add comments
- Approve
- Mark as *Requires Decision*
- Cancel

After the review, the agenda can still be edited again if required.

6.2.2. Reviewing Minutes

When the meeting status is **Minutes Draft**, you can also request a review for the meeting minutes.

- Click on the **3 dots (⁝)** on the top-right of the meeting popup and select **Request Minutes Review**.
- Select the reviewer(s) → Email is sent → Reviewer opens email → Reviewer sees option to **Review Minutes**.

Reviewers can then:

- Add comments
- Approve
- Mark as *Requires Decision*
- Cancel

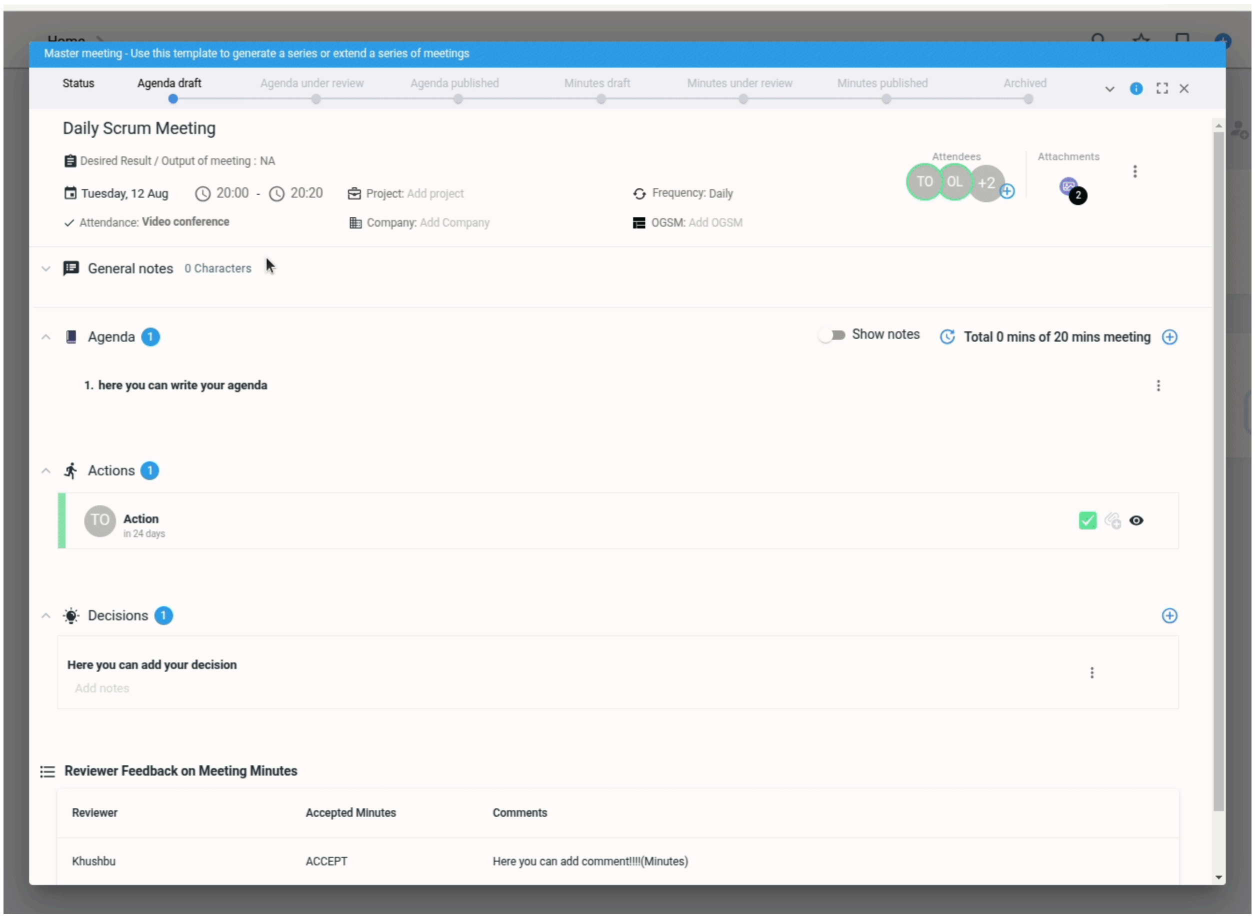
The minutes can also be edited again after review if needed.

6.2.3. Tracking Reviewer Feedback

In the **Reviewer Feedback** section of the meeting, you can see all responses clearly:

- **Reviewer Name** – Who provided the feedback
- **Accepted/Rejected Status** – Whether they approved or required changes
- **Comments** – Any additional notes or suggestions from the reviewer

This makes it easy to track approvals and suggestions, ensuring that both agendas and minutes go through a proper validation process before being finalized.



7. Q&A: How to keep track of discussions on a specific topic over time?

Complex programs often have lengthy timelines.
There may be personnel changes in the interim, which makes it difficult to rely on collective memory to trace exact agreements.
It is inefficient to search through scattered minutes for decisions on specific topics and projects.

The Meeting Module within *MyContractManager* helps you maintain a comprehensive record:

- **Agenda Item,** e.g., "purchase of new charging stations."
- Record all key agreements related to this agenda item as an **Action** or **Decision.**
- Link the action or decision to a **Project.**
- The project displays all decisions made over time and links to the agenda item, allowing you to view the full minutes associated with it.
- You can also generate a report containing decisions, explanations, meeting dates, and minutes for the relevant agenda item.

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Record all key agreements related to this agenda item as an Action or Decision.

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The project displays all decisions made over time and links to the agenda item, allowing you to view the full minutes associated with it.

You can also generate a report containing decisions, explanations, meeting dates, and minutes for the relevant agenda item.

7.1. How to Add/Remove and Restore attachment in the meeting

How to add attachment to the meeting?

1. Open the specific meeting where you want to add the attachment.
2. Look for an "Attachments"
3. Click on "upload new file".
4. Select file from your system and save.
5. Once uploaded, the file should appear in the attachment list for that meeting.

How to remove attachment from the meeting?

1. Open the specific meeting where you want to remove the attachment.
2. Look for an "Attachments"
3. Click on it.

4. In the uploaded files section, you'll see a delete button next to each file. Click it to remove the file you want to delete.
5. The file will get removed.