



# iMeetingX

Getting Things Done  
for Business



User Manual

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# Getting Things Done for Business

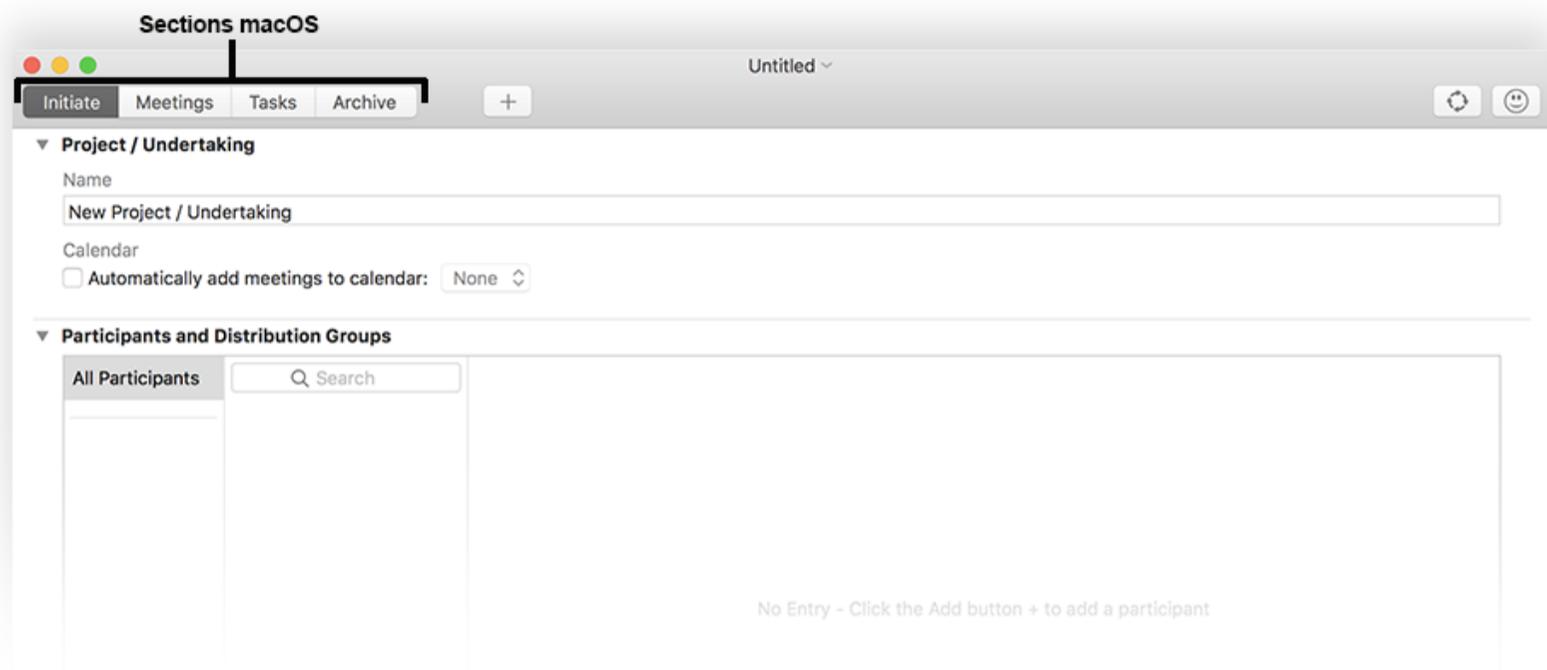
Good meetings result in defined tasks, defined tasks need meetings to follow-up. In a business environment, it's also essential to track decisions, create and distribute meeting invitations, reminders and minutes. To meet all these business requirements in iMeetingX, we have expanded the easy to use Getting Things Done task management tools with advanced meeting organization and automatic meeting minutes management options.

Getting Things Done for Business has also a strong focus on projects, which are now commonplace in business environments. To cater for this project focus, a project can be created as a **single project file in iMeetingX that contains information on an unlimited number of meetings, as well as actionable/actioned items, attachments, and can be stored in a user-specified place.**

The screenshot displays the iMeetingX application interface. At the top, there are navigation tabs: 'Initiate', 'Meetings', 'Tasks', and 'Archive'. Below these is a search bar and a window title 'webseite-2018 — Edited'. The main content area is titled 'Web 2018' and is divided into three columns. The left column, 'Smart Lists', contains a list of filters such as 'Inbox' (5 items), 'Obsolete', 'Requirements | Notes' (1), 'Decisions', 'All current Action Items' (6), 'Overdue (15.01.2018)' (7), 'My current Action Items', 'Delegated current Action Items' (6), 'Completed Action Items', and 'All' (12). The middle column, 'Action Items, Decisions and Notes', shows a list of tasks with details like 'Prepare and submit CR for flip function' (Due-Date 26.11.2016, Id 6), 'Container box has to be updated and Confex4 is currently in the process of updating art work...' (Id 7), 'Project participants will receive weekly team meeting minutes directly from project manager' (Due-Date 18.11.2016, Id 9), 'The status of the QG2 deliverables (QG2 check list) was reviewed today...' (Due-Date 18.11.2016, Id 23), and 'Extra project review with PMO is scheduled for 01/21/2017' (Id 26). The right column, 'Title', shows the details for the selected task: 'Container box has to be updated and Confex4 is currently in the process of updating art work and delivery of boxes is scheduled for early December.' It includes fields for 'Description', 'Information' (Type: Idea / N..., State: Waiting), 'Responsible' (Andreas Aigner), 'Priority' (No explicit Priority), 'Start-Date', 'Due-Date', 'Created' (18.11.2016, 15:22), and 'Last Change' (19.11.2016, 11:19, Responsible).

# Basics in iMeetingX

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iMeetingX supports a variety of working methods, whether it is planning and holding meetings in a classic way or collecting ideas or tasks during the daily work on a project, that need to be discussed later in a meeting.

- Under **„Initiate“** relevant settings for the project / undertaking can be defined. These range from the definition of the team to the visual design of the meeting invitations, minutes and lists.
- In the **„Meetings“** section, one can create or manage meetings and, optionally, send invitations.
- **„Tasks“** allows action items, decisions, ideas / notes and requirements to be recorded, similar to a log that can be automatically sent to all or only selected participants.  
In addition, there is the option of attaching other information to each task. These are stored in iMeetingX throughout the project progression.
- In **„Archive“** all invitations, meeting minutes and attachments of concluded meetings are stored and can be easily accessed for research or evaluation purposes.

Every project / undertaking in iMeetingX is stored in a single project file and can contain information on an unlimited number of meetings, tasks and attachments. This makes it easy to find all relevant project information in one place.

Furthermore, all your favorite cloud-storage-services or local sever can be used to share and store the project files.

## Hint

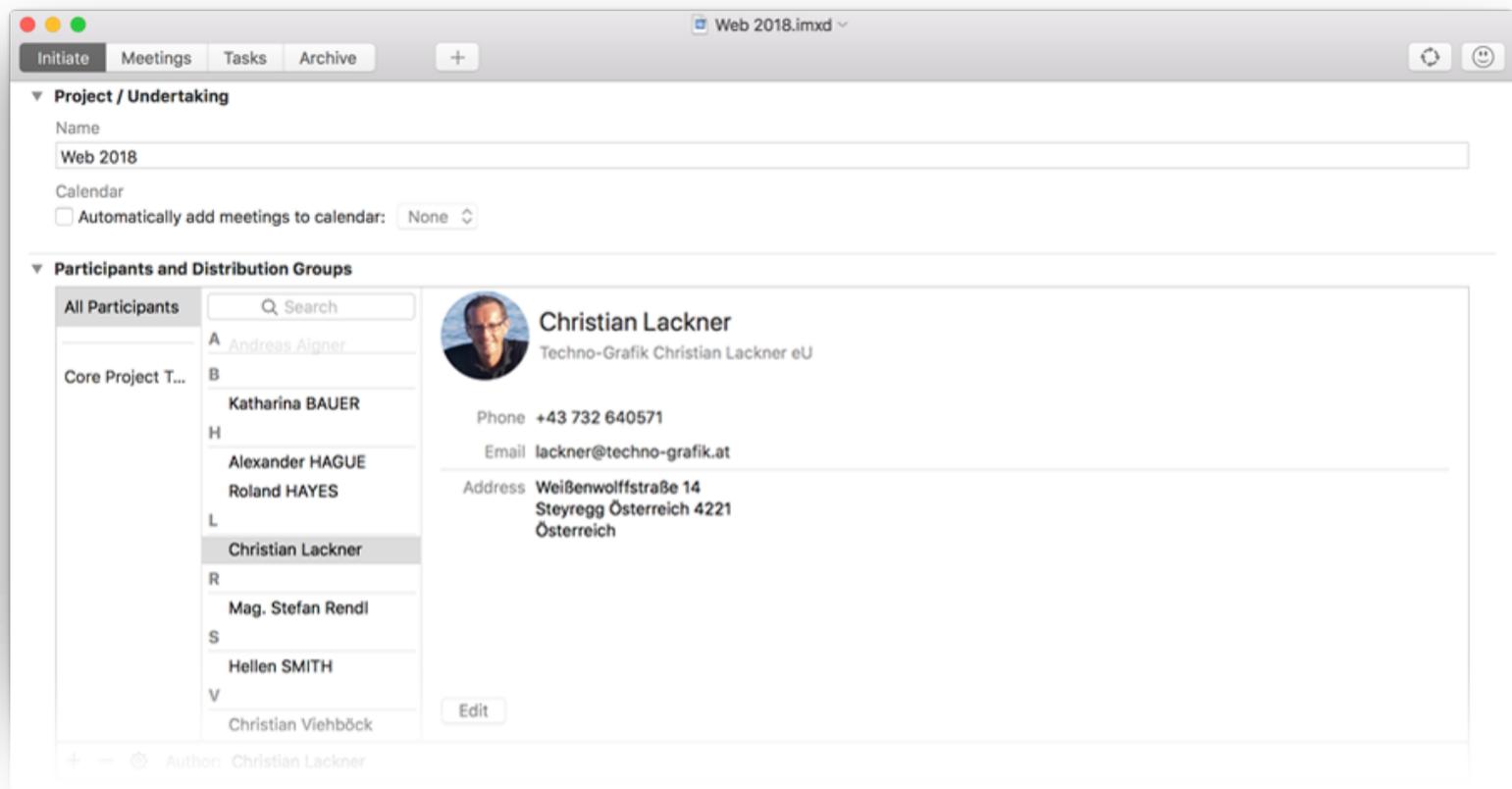
In iMeetingX, entries can be added with the + button and deleted with the – button. Additional functions are available in various context menus and can be opened by clicking on the corresponding object with the right mouse button or by clicking on the corresponding „action“ button ☹.

## General

- To activate the spell check function, point in the menu bar to „Edit“ > „Spelling and Grammar“ > „Check Spelling while Typing“.
- To view several projects / undertakings in separate windows or in a tabbed window, then point in the menu bar and select „Window“ > „Move Tab to New Window“ or „Merge all Windows“.
- The size of sidebars and workspaces can be customized and saved using the menu bar under „Windows“ > „Save Workspace as Default“. The „Reset Workspace“ option in this menu resets the changes back to the factory settings.
- To change the iMeetingX preferences, such as the application language or email settings, select „iMeetingX“ > „Preferences“ in the menu bar.
- iMeetingX supports commonly used macOS keyboard shortcuts. For example, „CMD+Z“ can be used to undo previous actions step-by-step.

# Set up a project for unlimited tasks and meetings

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In this section, the general conditions of your project / undertaking are established. This information provides the foundation for all future meetings and tasks.

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## PROJECT / UNDERTAKING

Find a descriptive and relevant project name that will clearly identify the project / undertaking to all participants.

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## CALENDAR

Select „Automatically add meetings to calendar” to automatically create a calendar entry in your calendar application for all future meetings. iMeetingX will create a new calendar and manage it automatically.

Alternatively, an already existing calendar can be selected, and the dates of your scheduled meetings added.

Supported calendar applications:

- Calendar (macOS)

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## PARTICIPANTS AND DISTRIBUTION GROUPS (AUTHOR)

All participants, who are involved in the project can be added to this list. Participants are added or deleted by pressing the + or – button respectively.

Use the „action” button  to access the context menu. Select „Import Participants” in the context menu to import participants from the following application:

- Contacts
- iTaskX
- iMeetingX

Create or delete distribution groups using the + or – button. The benefit of distribution lists is that you can later assign a whole group of participants to a meeting in just one step.

To add participants to a group, select the desired participants and use drag & drop to assign them.

### Note

If a participant is deleted from a distribution group, they are only removed from the distribution group. Note, this participant will remain in the project.

### Author

In iMeetingX, the author is usually the person who plans and holds the meetings, add tasks and sends meeting minutes (for example, a project manager). iMeetingX also considers the author for some Smart Lists in the „Tasks” section, for example, for the Smart List „My current Action Items”. If the author is changed, the assigned tasks in the relevant Smart Lists will also change.

**To define the author, use drag & drop to move a participant from the list into the intended field.**

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## MEETING TYPES

Meeting types are used in iMeetingX to analyze and specify different meetings. iMeetingX already has a few predefined default meeting types. Use the + or – button to add or remove meeting types. Examples of meeting types include: Daily Scrum Meeting, Client Meeting, Department Meeting, etc.

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## APPEARANCE

Double-click on the respective icon to open the „Appearance” window. Here the layout of meeting invitations, minutes and lists can be changed and personalized (for example, accent color, header and footer...), and print settings chosen.

Furthermore, the title of your invitations, minutes or lists as well as grouping of meeting minute entries can also be changed here.

iMeetingX offers two grouping options under „Layout”:

- **„Grouping Mode: Entry Type”**: The entries of the meeting minutes are listed under the categories „Action Item, Decision, Idea / Note and Requirement”. The sorting of the entries in the different categories corresponds to the setting defined in the task list.
- **„Grouping Mode Agenda Item”**: This option lists the entries of the meeting minutes under the created agenda items. The sorting of the entries under the different agenda items corresponds to the setting defined in the task list.

To activate a header and footer row, click the corresponding option in the right inspector. Once activated, the header or footer will appear in the preview and can be edited. If needed, automatic generated text elements such as page number, project name, system date, etc. can be inserted. These so-called „Smart Fields” are listed in the mini toolbar above the page preview.

To add pictures to your header or footer, for example a logo, use the button „Add Image” in the inspector.

### Hint

To use these settings (footer, header, colors...) in other document templates, use the menu bar and click on „Edit” > „Assign Print Info to”.

To save the chosen settings and close this view, click on the „Done” button below the inspector.

# Plan meetings for your project and send invitations

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iMeetingX already offers a range of templates for the most important meeting types. Of course, new meetings or templates can be created with a few clicks.

Once a meeting is created using the + button, it will be displayed in the left sidebar in the „Meetings” area. iMeetingX now ensures that changes to meetings, regardless of where they are made, are updated in all relevant areas and sections of the application.

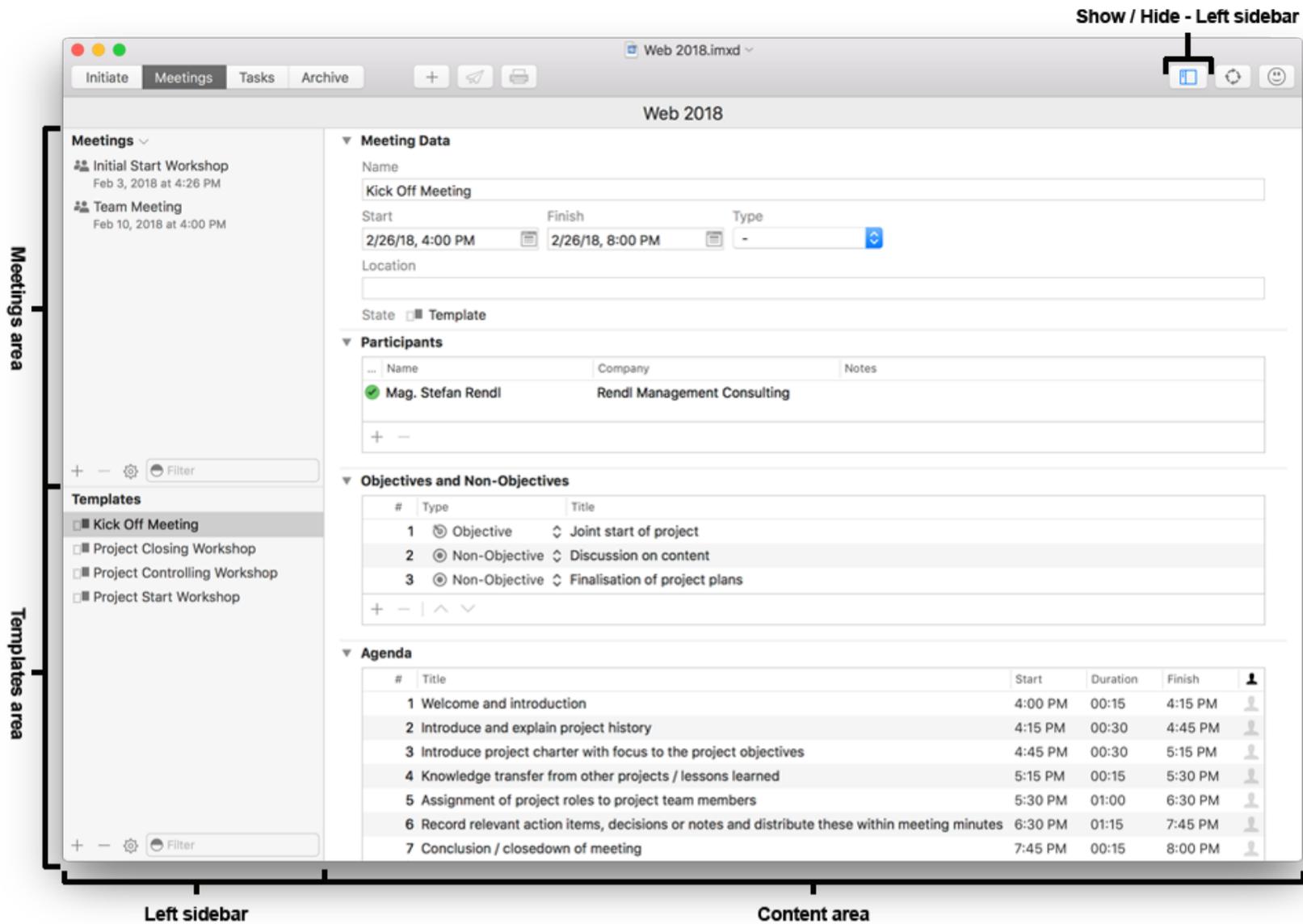
When the planning of the meeting is complete, iMeetingX can be used to either email or print an invitation. To do this, select the desired meeting in the „Meetings” area and either click „Send Invitation” or „Print Invitation” in the toolbar.

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## LEFT SIDE BAR - „MEETINGS” AREA

All planned meetings are listed in this area. Archived meetings will be automatically removed from this list.

Further options to show or hide planned meetings are available by clicking on the  button next to the heading „Meetings”.



Use the + or - button to create new meetings or to delete unwanted meetings. In the context menu („action” button ☰) there are also functions like: „Duplicate Meeting”, „Save Meeting as Template”, „Send or Print \_Invitation”, „Archive Meeting”, etc.

After „Send Invitation” or „Print Invitation” is activated at the end of this process, the meeting status changes from „Planned” to „Invited”. iMeetingX sends invitations per Email as PDF files, attachments are automatically attached, and an ICS document with the meeting appointment is also attached. The PDF file of the created invitation is accessible under „Attachments” in the content area.

Once „Automatically Add Meetings to Calendar” in the section „Initiate” is activated, the appointment will be entered into the selected calendar.

## LEFT SIDE BAR - „TEMPLATES” AREA

Predefined templates can be accessed, or new templates can be created here.

Use the + or - button to create or delete templates or choose „Add Template” in the context menu („action” button ☰).

In iMeetingX, any planned meeting can be saved as a template. To do this, click on the corresponding meeting and choose „Save Meeting as Template” from the context menu („action” button ☰).

To create a meeting from a template, click on the preferred template and choose „Create new Meeting from Template” from the context menu („action” button ☰).

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## CONTENT AREA

Depending on the selection, the properties of the meeting or template are shown.

### Meeting Data

- **Name:** Description of meeting. The meeting name will also be visible later in the invitation or the meeting minutes.
- **Start:** Time of meeting start. This value will also be used as the starting time in the agenda.
- **Finish:** Time of the meeting conclusion. If you are planning an agenda, you do not need to enter a value, as iMeetingX will do this for you automatically.
- **Type:** Allocation of a defined meeting type from „Meeting Type” in the „Initiate” section.
- **Location:** If possible, describe the place of the meeting, for example using an address, to ensure that all participants will find their way to the meeting place.

### Participants

Use the + button to assign participants or groups involved in the meeting that you have created in the „Initiate” section.

The status of a participant („Present”, „Absent Excused”, „Absent without Excuse”) or a note for a participant can be recorded by double-clicking on that participants name.

### Objectives and Non-Objectives

Here, you can define the purpose of the meeting or identify topics that will or will not be the focus of the meeting. Use the + and - button to add or remove entries.

## Hint

- To rearrange entries, select the desired row(s), click the left mouse button and drag the row(s) to the desired location.

## Agenda

The agenda items are defined in the agenda area. Click the + button to create a new entry, name the agenda item and enter the duration. iMeetingX will automatically calculate the start and the finish. Of course, you can also set your own start and finish values. To add a responsible participant to an agenda item, double-click on the people button at the end of the row. Once the menu has appeared, select the chosen person and press the „Assign” button. If the desired person does not appear in the list, go back to the „Initiate” section and add this person to the „Participants and Distribution Group” area.

## Hint

- To rearrange entries, select the desired row(s), click left mouse button and drag the row(s) to the desired location.

## Attachments

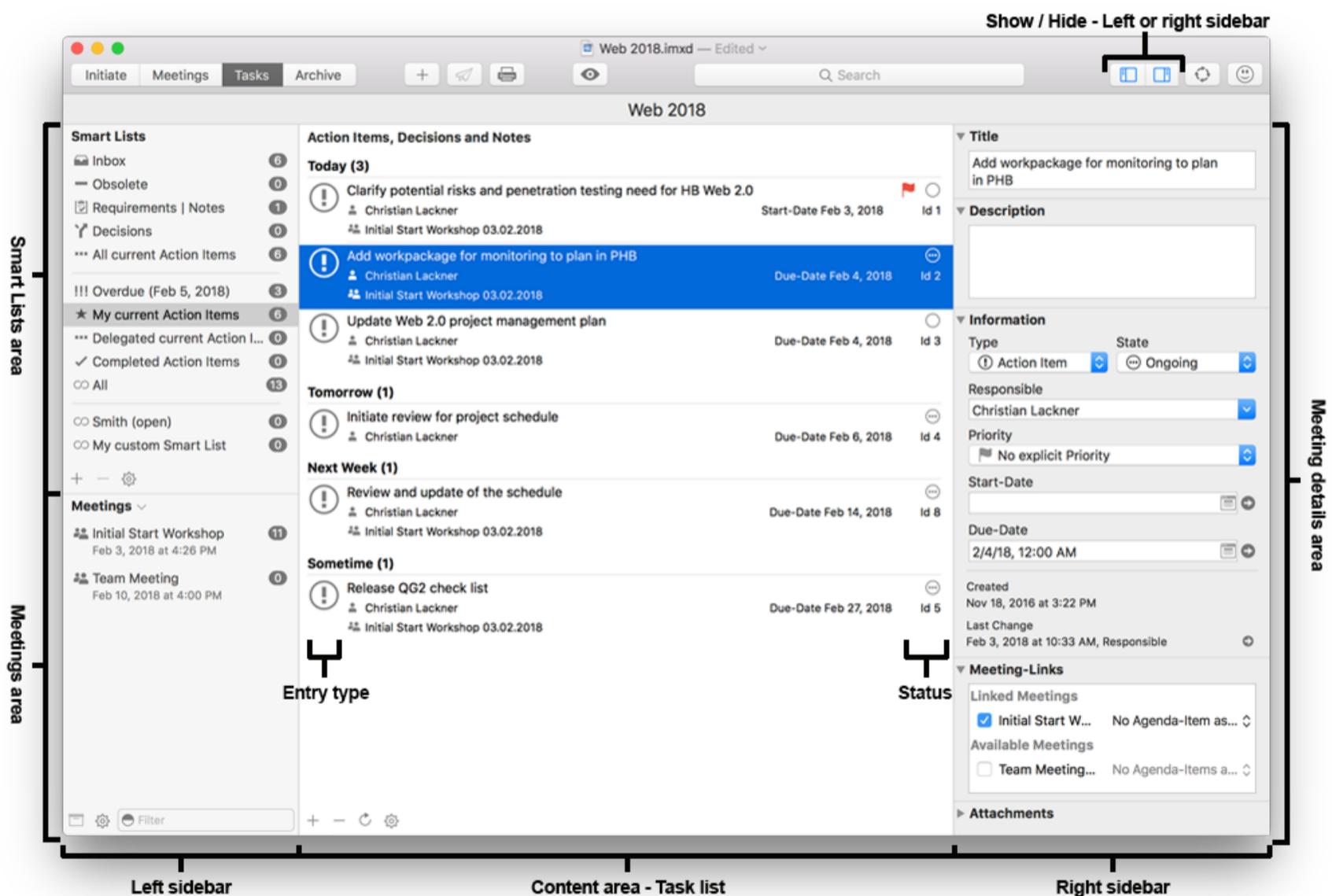
Press the + button or use drag & drop to add external documents to your meeting. These are attached to the invitation and the meeting minutes when sending an email. If you don't want to send a specific attachment with your invitation or meeting minute, click on „Edit Attachment” in the context menu („action” button ☹) and deactivate the option „Include in Mails”.

# Manage tasks, hold meetings and send meeting minutes

All necessary tools to manage tasks and assign them to meeting minutes are available in the „Task” section. To manage tasks, iMeetingX uses the project management method „Getting Things Done” (GTD).

Action items, decisions, ideas / notes or requirements can be added before, during or after a meeting. It's also possible to assign further information, incl. start and due date, responsible person, priority, description, status, attachments, etc., to each entry in the task list.

If necessary, these entries can be assigned to a specific meeting or agenda item, or additional documents. Unlimited attachments can be assigned to each entry. All attachments are automatically managed in the iMeetingX project file.



As soon as the meeting is over, you can send or print with just one click on „Send Meeting Minutes” or „Print Meeting Minutes” in the toolbar or in the context menu („action” button ☰).

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## LEFT SIDE BAR - „SMART LIST” AREA

iMeetingX provides smart lists for task management based on the project management method "Getting Things Done". This will automatically assign your entries to a smart list depending on the status, responsible person and due date.

Of course, the + button or the context menu („action” button ☹) can be used to create user defined smart lists, which meet individual needs. The editor for user-defined smart lists contains all conceivable filter variants.

### By default, iMeetingX includes the following smart lists:

- **Inbox:** New entries automatically have the status „Waiting”. Ideas or thoughts can be captured in the inbox immediately and can be specified or planned later. Only when the status is set to „Open” or „Ongoing” are these entries relevant to the task management; for example, they can be automatically assigned to the smart list „All current Action Items”. Entries with the status „Waiting” are not available in any other smart lists.
- **Obsolete:** Shows you all currently not relevant entries. An entry can be set as „Obsolete” by changing the status in the right detail-area.
- **Requirements / Notes:** Shows all entries with the type „Idea / Note” or „Requirement”. Entries with the status „Waiting” or „Obsolete” are excluded.
- **Decisions:** Shows all entries with the type „Decision”. Entries with the status „Waiting” or „Obsolete” are excluded.
- **All Current Action Items:** Shows all entries of the type „Action Item” with the status „Open” or „Ongoing”.
- **Overdue:** Shows all entries with a due date of today or in the past.
- **My Current Action Items:** Shows all entries assigned to the author with the status "Open" or "Ongoing".
- **Delegated Current Action Items:** Shows all entries of the type „Action Item”, where the responsible person isn't the author, and the entry has the status „Open" or „Ongoing".

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## LEFT SIDE BAR - „MEETINGS” AREA

This area shows all meetings that were created in the section „Meetings”. Meetings, which are listed in the section „Archive”, are not available in this list.

Meetings can be displayed or hidden with a click on the  button, located to the right of the heading „Meetings”.

To see all details of a Meeting, such as participants or the agenda, simply double-click on the meeting name.

**To reschedule a meeting, switch back to the section „Meetings” by clicking on the „Meetings” toolbar button. Changes can then be made before switching back to the section „Tasks”.**

To change the status of a participant, double-click on the name of the participant or right click on the name of the participant and use the context menu („action” button .

There is a function in this context menu to send minutes to the chosen person.

**To „freeze” the current state of entries assigned to a meeting, move them into the „Archive” section using the „Archive” button or the context menu („action” button ). It's recommended to do this after the minutes of a meeting have been sent.**

### Note

A meeting, which is already moved to the „Archive” section, can't be reactivated after the iMeetingX application is closed. Meetings in the „Archive” section are only available for research purposes! Entries assigned to an archived meeting are still available in the task list and can be edited or assigned to other meetings.

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## CONTENT AREA - TASK LIST

Use the + or - button in the toolbar or at the bottom of the content area to add or remove entries.

### Hint

The shortcuts „ALT+ENTER” or „DEL” (macOS) can also create or delete entries.

In the context menu („action” button ) there are a lot of additional functions applicable to entries. For example, a task list can be exported as a CSV file to allow further editing in an external application (Excel, Numbers, iTaskX, FileMaker, etc.).

To export individual entries, select them before choosing the export option, or use a different smart list.

The sorting of the task list can be customized either with the button „Appearance" in the toolbar or in the context menu („action" button ☹) under „Appearance".

## Hint

To keep the task list compact, long titles and descriptions can be shortened by disabling the „Show whole title" or „Show description" options in the „Appearance" dialog from the toolbar.

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## RIGHT SIDEBAR - DETAIL-AREA

All options for the selected entry are displayed here and will change when another entry in the task list of the content area is selected.

Structure of Entries:

- **Title:**  
A comprehensible, short and concise description of the document items.
- **Description:**  
Supplementary factual information. This field adapts automatically and can be any length.
- **Type:**  
iMeetingX distinguishes between four entry types:
  - ⓘ **„Action Item"** is used to capture all activities that require an action. This is the default entry type in iMeetingX.
  - ⚡ **„Decision"** is intended for decisions, votes and decisions to be taken.
  - 📋 **„Idea / Note"** should be used for subordinate or participant-specific information.
  - 📌 **„Requirement"** captures a claim or expectation (e.g., of the client).
- **State:**  
For more detailed monitoring, a status can be assigned to each entry:
  - 📁 **„ Waiting"**
  - **„ Open"**
  - ⋯ **„ Ongoing"**
  - ☑ **„ Completed"**
  - ⊖ **„ Obsolete"**

New entries automatically have the status „Waiting”. Ideas or thoughts can be captured in the inbox immediately and can be specified or planned later. Only when the status is set to „Open” or „Ongoing” are these entries relevant to the task management, and can for example, be automatically assigned to the smart list „All current Action Items”.

For more information about how smart lists are affected by a status change, see the smart lists description.

- **Responsible:**

A person performing a task, making a decision or making a note.

- **Priority:**

Importance or ranking of the entry.

- **Start-Date:**

Is an optional input which determines the time from when, for example, an action item can be started.

- **Due-Date:**

Time until an action item must be finished, or a decision / comment must be made. The deadline.

- **Created:**

Creation date of the entry.

- **Last Change:**

Complete documentation of all changes that are made to an entry. If necessary, the change history can be saved as a CSV file or the change log can be deleted.

macOS: Click on the arrow at the end of the row and choose „Save Log” or „Clear Log”.

- **Meeting-Links:**

Every entry to a meeting and agenda item can be assigned using the meeting-links in iMeetingX.

To create meeting minutes, the desired entries must be assigned to a meeting.

To group entries in minutes under various agenda items, these entries have to be first assigned to the desired agenda items and then the option „Grouping Mode Agenda Item” chosen in the section „Initiate” > „Meeting Types and Appearance” > „Meeting Minutes” (double-click on this icon).

If this option is not selected, iMeetingX will group the entries in your meeting minutes by entry type (Action Items, Decisions, Ideas / Notes and Requirements).

The sorting of the entries under the agenda items or entry types corresponds to the setting defined in the task list.

A detailed description of how the appearance of invitations, meeting minutes or lists can be customized can be found in section „Initiate”.

Entries to meetings can be assigned with drag & drop or also with the use of the „Meeting-Links” function in the right detail-area. An assignment can be adjusted at any time as long as the meeting has not been archived. Assignment changes, like all other changes, are listed in the change-log.

- Use drag & drop to assign entries

Step 1: Assign an entry to a meeting

Select the desired entries in the task list, which should already be assigned to a meeting, and drag them to the relevant meeting in the left sidebar („Meetings” area) with the mouse button pressed down. The entries are assigned upon release of the mouse button.

Step 2: Assign an entry to an agenda item

Double-click on a meeting name to open the meeting’s details. Then select the desired entries and drag them to the relevant agenda item. The entries are assigned upon release of the mouse button.

The created assignments will appear in the detail-area under „Meeting-Links” > „Linked Meetings”. Meetings are listed on the left and the associated agenda items on the right.

- Use the detail-area to assign entries

Highlight an entry in the task list, which should already be assigned to a meeting, point to the box „Meeting-Links” in the detail-area and choose the desired meeting under „Available Meetings”. If needed, the corresponding agenda item beside the meeting can be further specified.

- **Attachments:**

Use the + or - button to add or delete attachments to the selected entry. As usual, this function is also available in the context menu („action” button ☰).

Another option is to use drag & drop to attach relevant documents to an entry. Select the document and drag it with pressed mouse button to the „Attachments” box in the detail-area. The attachment is assigned upon release of the mouse button.

Notes

- Documents can only be assigned with drag & drop from the Finder (macOS). For example, to assign an email, it should first be dragged to the Finder (macOS), and the mouse button released. Drag & drop can now be used to assign it to an iMeetingX entry.

- Once an attachment has been assigned to an entry or meeting, iMeetingX takes over the file management. Document changes remain saved in iMeetingX.

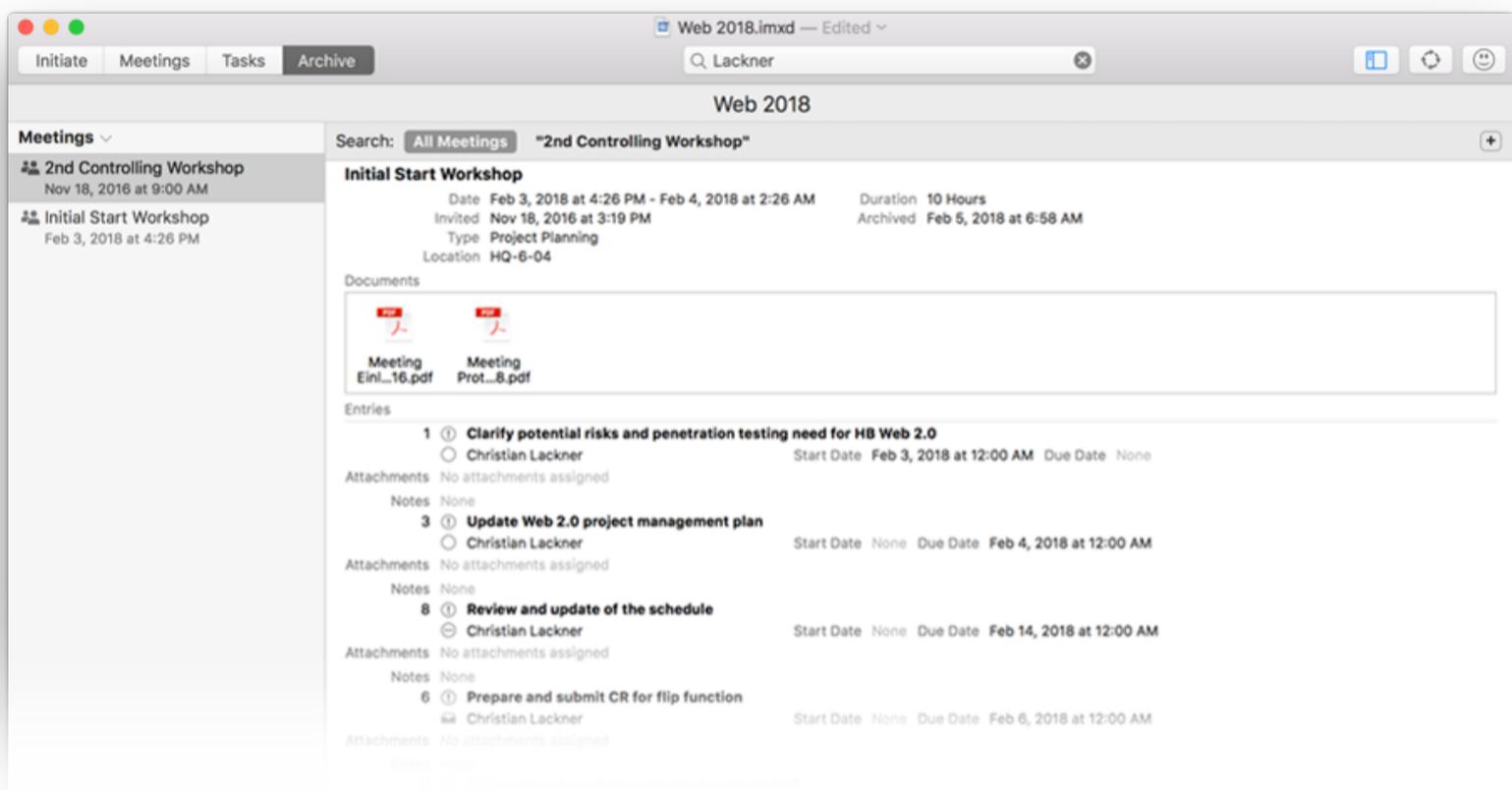
When a meeting is moved to the „Archive” section, copies of the assigned attachments are saved with the current state of the documents.

Of course, further editing of an entry and its attachments can be done at any time in the „Tasks” section.

# Work with the archive in iMeetingX

A meeting can be moved to the archive via the context menu („gear” or „•••” button) or by clicking the button „Archive Meeting” in the „Tasks” section. The context menu for this feature is available in the „Meetings” and „Tasks” section. Once the meeting is moved to the archive, it can be used exclusively for research purposes.

The left sidebar shows a list of all archived meetings. In the right area, all meeting information for the selected meeting with all attached documents, including meeting minutes or invitations, are first displayed and then the assigned entries. If an entry has an attachment, this attachment can be viewed for each entry under „Documents”.



The search function in this view, enables iMeetingX to search in the meeting that you have selected in the left side bar. To search in all archived meetings, click on „All Meetings” in the mini toolbar.

## Note

An archived meeting cannot be reactivated! The assigned entries can, of course, be further edited in the „Tasks” section.