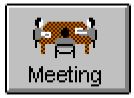
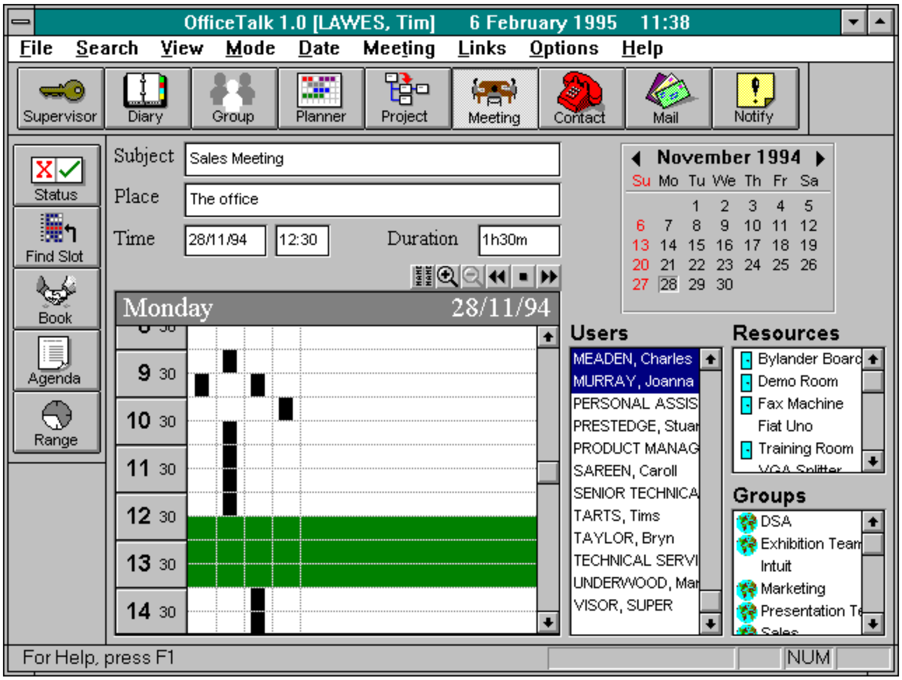
Meeting Mode 

Meeting Mode lets you organise meetings simply and efficiently. From within Meeting Mode, you can check other users and resources availability, write meeting agendas, send out meeting invitations and monitor the replies. Meeting Mode works closely with the OfficeTalk mail system which is explained in the **Mail Mode** chapter.



Meeting Mode

The following steps detail how to go about inviting users, booking resources, choosing a time for the meeting and then finally booking the meeting.

Giving the Meeting a Name

When you book a meeting, you will usually want to give the meeting a name to identify what the meeting is about. Enter a single line description for the meeting in the *Subject* field. It is important that you enter some form of description in this field so that at a glance users, who are invited to the meeting, can have an idea of what the meeting is about.

Selecting the Meeting Date

You can use the calendar to select the date of the meeting. The selected date is shown at the top of the Multi Bookings Window.

Inviting Users to the Meeting

Selecting the users that you want to invite to a meeting is straightforward. Simply select their names from the Users List in Meeting Mode by clicking on them using the left mouse button. As soon as you select a user from the list, that users availability for the selected date will be shown in the Multi Bookings Window.

Welcoming a User

Normally, when you invite a user to a meeting, the user must reply that he/she can attend before the meeting goes ahead. However, it is possible to invite certain users as *welcome to attend*. This means that those users will receive an invitation saying that they are welcome to attend the meeting, but if they decline the invitation then the meeting will still go ahead as planned.

You can invite a user as *welcome to attend* by keeping the CTRL key pressed when selecting the user from the list. The user's availability will be displayed in a hatched colour instead of a solid colour and the user's name will be highlighted in *green* rather than *blue* to distinguish it from availability of users who must attend the meeting.

Booking Resources for the Meeting

Resources may be reserved for meetings. This is done by selecting the appropriate resource from the resource list. There are two types of resource:

- Fixed resource
- Non-fixed resource

You may only reserve one fixed resource. This is because OfficeTalk uses the fixed location of the resource as the meeting location. A *fixed* resource is, for example, a meeting room.

You may reserve as many non-fixed resources as you like.

Specifying a Location for the Meeting

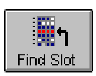
You can specify a location for a meeting by entering the location into the *Place* field. If you reserve a fixed resource by selecting it from the Resource List, the location of the resource will be displayed in the *Place* field.

Selecting the Time and Duration

> **Note:** You should select the *date* of the meeting prior to selecting the time and duration. See **Selecting the Meeting Date** earlier in this chapter.

You can specify the meeting time and duration by clicking the left mouse button down on the relevant timeslot in the Multi Bookings Window (defining the start of the meeting) and, whilst keeping the left button down, dragging the mouse down. As you drag the mouse down, each half hour timeslot in the Multi Bookings Window will highlight green, to indicate that all of the selected users and resources are available, or red to indicate that one or more users or resources are unavailable during that time, or *blue* to indicate that *welcome* users are unavailable during that time. The duration of the meeting will be defined by how many timeslots you highlight. If any of the timeslots are red, you have three choices:

❶ You can try another starting time on the current day or another day until all the timeslots selected remain green.

❷ You can press the 

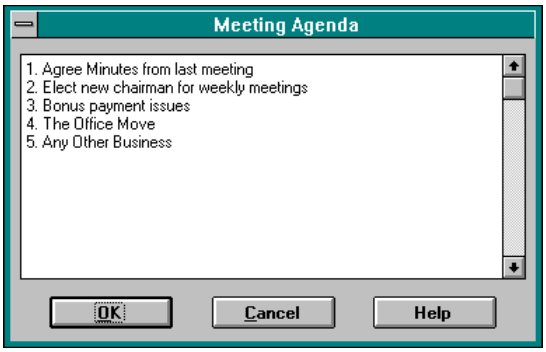
button . This will look for the next time when all invited users and resources are free for the duration of the meeting.

❸ If the meeting *must* go ahead at a certain date and time, you can choose to go ahead and book the meeting, letting the recipients decide for themselves whether or not to attend the meeting instead of doing what they originally planned. You should remember that their original bookings may not easily be changed and if they are definitely required to attend the meeting then it may help to go into their diary and look at exactly what they had planned.

Specifying an Agenda

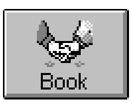
You can specify an agenda for a meeting by pressing the 

button. An Agenda dialog box will appear letting you enter a free-format agenda. You can cut and paste text from any Windows™ application, i.e. a word processor into the agenda.



Agenda dialog box

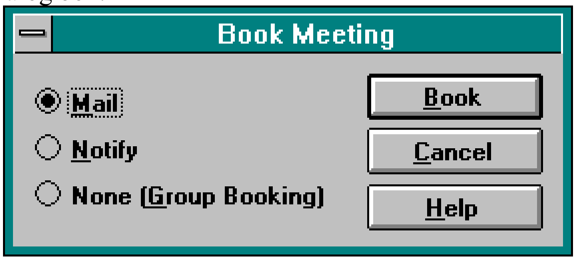
Press **OK** to save the agenda. When you book the meeting, the agenda will be cleared.



Booking the Meeting

When you have filled out the subject, selected the users and resources, optionally added the agenda and specified the date, time and duration of the meeting, you can press the 

button. OfficeTalk will pop up a Book Meeting dialog box.



Book Meeting dialog box

OfficeTalk gives you the choice of three ways of informing the users of the meeting.

Œ Mail
 Notify
Ž None (Group Booking)

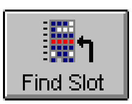
Select one of these radio buttons and press the 

button.

If you select the **Mail** radio button, OfficeTalk will put a *tentative* appointment in every invited user's diary and will put a firm appointment in every reserved resource's diary. OfficeTalk will also mail each invited user, informing them of the meeting time, place, duration, agenda, invited users and booked resources. If an invited resource has an owner, then that owner will be mailed to inform them that their resource is required at the meeting.

If you select the **Notify** radio button, OfficeTalk will do as described above, except, instead of *mailing* the users, a notification will be used (see **Notify Mode**). This is often more useful if a meeting has to be called at very short notice.

If you select the **None (Group Booking)** radio button, then OfficeTalk will put a firmed appointment in all selected users' and resources' diaries and will neither mail nor notify the users. This can be very useful when you wish to book the same appointment for a group of users and resources and there is no need to ask for availability confirmation.

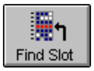


The Find Slot Button

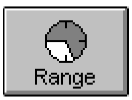
OfficeTalk can automatically find a time when all selected users and resources are available for the duration specified. You can do this in the following way:

❶ Select all the users and resources that you wish to invite

❷ Specify the time and duration for the meeting by clicking the left mouse button on the appropriate timeslot (to specify the start time) and, while keeping the left mouse button depressed, drag the mouse downwards to specify the duration. Then release the left mouse button.

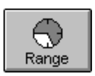
❸ Press the  button

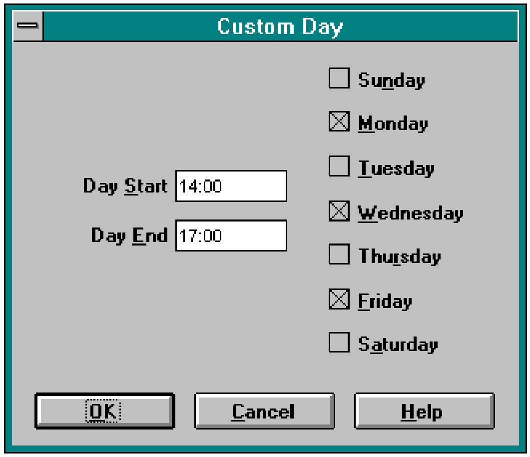
OfficeTalk will look for the next available time that all invited users and reserved resources can attend. The display will change to show the available timeslots. The search for the next available time will begin from the currently selected timeslots, or the current time, if no slots are selected, and will end when the next available time has been found. Once OfficeTalk has found an available time, you can either book the meeting straight away, by pressing the  button, or you can instruct OfficeTalk to search for another time by pressing the  button again. Find Slot works in conjunction with the Meeting Range button. (See **Meeting Range** later in this chapter).



Meeting Range

OfficeTalk lets you define a range over which the Find Slot functionality will operate. For example, you could specify that you wish to search for availability only on Mondays, Wednesdays and Fridays between 2:00pm and 5:00pm.

You can do this by pressing the  button to pop up the Custom Day dialog box.



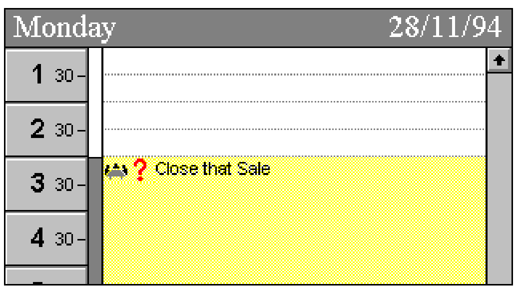
Custom Day dialog box

Choose the range for the availability searches and press **OK**. The Find Slot functionality will use this range for the remainder of the OfficeTalk session or until the range is changed again.

Note:	When OfficeTalk starts up, the range is set to be the same as the workgroup custom day.

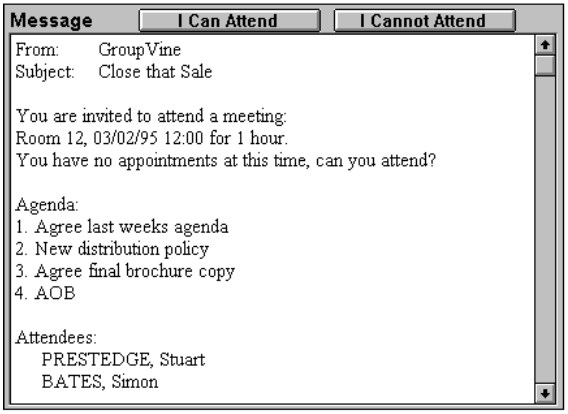
Replying to a Meeting Invitation

If you have been invited to a meeting, you will receive both a *tentative* booking in your diary and a mail message (or notification) inviting you to the meeting.



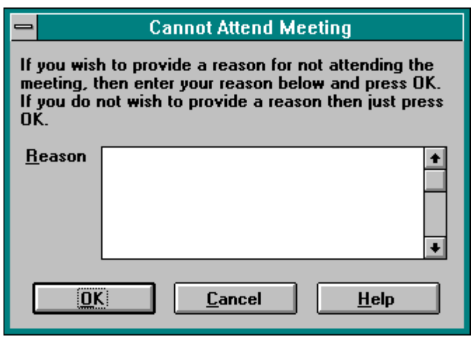
Tentative booking

A tentative booking may only be created by the OfficeTalk Meeting Mode. You can distinguish it from a normal booking because it has a ? marker drawn in the top left corner. You may not move or change the duration of a tentative booking. If the meeting organiser mailed you an invitation then this will appear in your Incoming Mail folder in Mail Mode.



Meeting Invitation

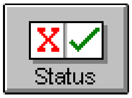
The mail message will inform you of the meeting date, time, duration, place and agenda and provides you with a list of other invited users. The message will show two buttons at the top of the message: an I Can Attend button and an I Cannot Attend button. Press the relevant button when you wish to reply to the invitation. Your reply will be accessible by anyone looking at the progress of the meeting using the **Status** button (See **Monitoring Invitation Responses** later in this chapter). If you decline the meeting invitation, OfficeTalk will display a Cannot Attend Meeting dialog box, letting you provide a reason for why you cannot attend the meeting.



Cannot Attend Meeting

If you wish to provide a reason, then enter your comments in the **Reason** window and press **OK**. If you do not wish to provide a reason then just press **OK**. If you do not want to decline the meeting invitation then press the **Cancel** button. For more information on sending mail, see the **OfficeTalk Mail** section.

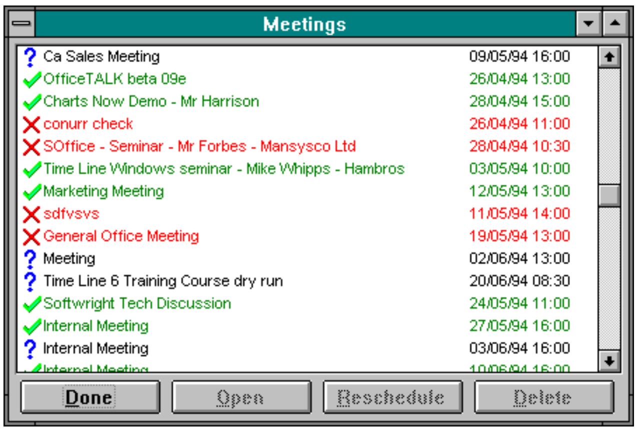
If you decline the meeting invitation, the tentative appointment will be removed from your diary. If you accept the meeting invitation, the appointment will remain tentative until all invited users have accepted the invitation at which point the appointments will become firmed in all invited users' diaries.



Monitoring Invitation Responses

Once you have booked a meeting you can monitor the responses to your invitation by pressing the 

button. A Meeting List will appear, presenting you with a list of booked meetings.



Meeting List

Each meeting will be either confirmed, undecided or rejected. A meeting is *confirmed* when all those who were invited have replied that they *can* attend. A *confirmed* meeting is shown in *green* and has a ✓ marker prefixed to the text. A meeting is *rejected* if one or more users, who were invited, decline the invitation. A *rejected* meeting is shown in *red* and has a ✗ marker prefixed to the text. A meeting is *undecided* if there are one or more users who have not yet replied but no-one has declined the invitation. An *undecided* meeting is shown in black and has a ? marker prefixed to the text.

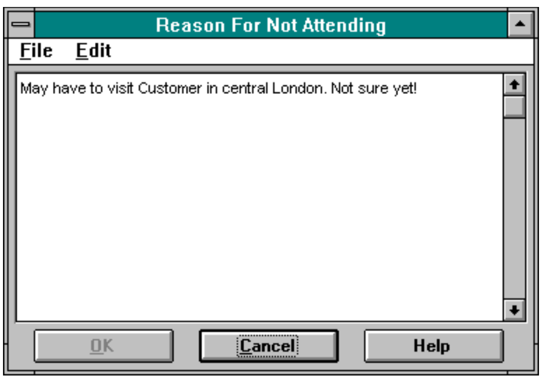
Meetings which are currently *in progress* are shown in *blue*. Meetings are always shown in date order and will remain in the Meeting List until you, or any other user, delete them.

Opening a Meeting

You may wish to view individual's responses to a meeting request and find out who has accepted and who has declined a particular meeting invitation. This can be done by *opening* a meeting. To do this, select the meeting that you wish to open from the Meeting List and press the Open... button. A Meeting Window will appear. This dialog box will display which users have accepted (displayed with a green *tick*), which users have declined (displayed with a red *cross*) and which users have not yet replied (displayed with a ? marker).

Viewing Reasons for Declining

If a user has declined a meeting invitation then you may find out the reason by selecting the user, from the Meeting Window, and pressing the Reason... button. If the user has provided a reason, then the comments will be displayed in a dialog box, as shown below.



Reason For Not Attending dialog box

If the user has not provided a reason then the Reason... button will be disabled.

Removing Users from a Meeting

If a user has declined a meeting request, yet the meeting will still be going ahead, then the user should be removed from the meeting. You can remove a user from a meeting in the following way:

1. Press the **Status** button to bring up the Meetings List
2. Select the relevant meeting and press the **Open...** button
3. Select the user that you wish to remove
4. Press the **Delete** button

OfficeTalk will confirm that you wish to remove the user. If you reply **Yes**, then OfficeTalk will remove the user from the meeting.

If a user has accepted the meeting invitation, you may still remove the user from the meeting to indicate that he/she is no longer required at the meeting. In this case, OfficeTalk will inform the user, using EMail, that he/she is no longer required at the meeting.

Removing Resources from a Meeting

A resource may be removed from a meeting at any time. You can remove a resource from a meeting in the following way:

1. Press the **Status** button to bring up the Meetings List
2. Select the relevant meeting and press the **Open...** button
3. Select the resource that you wish to remove
4. Press the **Delete** button

OfficeTalk will confirm that you wish to remove the resource. If you reply **Yes**, then OfficeTalk will remove the resource from the meeting.

Adding Users or Resources to a Meeting

Sometimes, you may wish to invite users or book resources to a meeting which has already been set up. You can do this in the following way:

❶ Press the 

button to bring up the list of meetings

❷ Select the relevant meeting

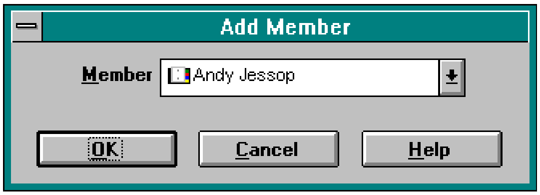
❸ Press the 

button to pop up the list of invited users and resources.

❹ Press the 

button**.**

The Add Member dialog box will appear.



Add Member dialog box

This dialog box contains a mixed list of users and resources. Note that none of the users or resources already invited to the meeting will appear in this list. Select the user that you wish to invite or the resource that you wish to book to the meeting and press **OK**. OfficeTalk will mail an invitation to an invited user or will inform the owner of a booked resource, as appropriate.

If you try to add a resource which already has an appointment at the time of the meeting, OfficeTalk will warn you of this by displaying the Override Resource Appointments dialog box. For more information on this see **Overriding Resource Bookings** later in this chapter.

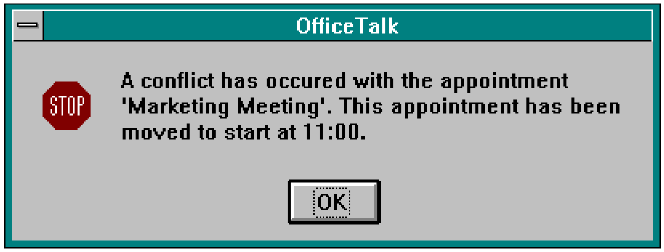
Overriding Resource Bookings

If you try to book a resource in your meeting which has an appointment at that time, then OfficeTalk will warn you of this by popping up an Override Resource Appointments dialog box.

Override Resource Appointments dialog box

The Override Resource Appointments dialog box gives you three choices:

Œ Overriding the existing appointment(s). This will move the existing appointment such that the new booking may be made. OfficeTalk will inform you where the existing appointment has been moved.



OfficeTalk Warning

You can override an existing appointment by pressing the Override button.

 Skipping the resource booking. This will not override the existing appointment and will not book the resource to the meeting. You can do this by pressing the Skip button.

Ž Cancel the entire meeting booking. You can do this by pressing the Cancel button.

Note: OfficeTalk will not let you override a resource's appointment if the appointment is a *meeting* appointment. In this case, the Override button is disabled.

Looking at a Meeting's Agenda

When you receive your meeting invitation, whether via a mail message or via a notification, the message will contain the meeting agenda, if one was written. Any user may view the meeting agenda in the following way:

❶ Press the Status button to bring up the list of meetings
❷ Select the relevant meeting
❸ Press the Agenda button

This will pop up the Meeting Agenda dialog box.

Rescheduling a Meeting

If certain key people decline your meeting invitation, you may choose to reschedule the meeting so that they can attend. OfficeTalk lets you reschedule a meeting so that all you need do is choose another time and place for the meeting. OfficeTalk will then mail all invited users, informing them that the meeting has been rescheduled and will ask them to confirm that they can attend. You can reschedule a meeting in the following way:

❶ Press the Status button to bring up the Meetings List.
❷ Select the relevant meeting and press the Reschedule button. The User and Groups List will be replaced by a Cancel Reschedule button.
❸ Choose the time and place of the meeting as usual
❹ Press Book to book the meeting or Cancel Reschedule to cancel.

OfficeTalk will effectively cancel the old meeting and all the associated tentative bookings and will re-book the meeting at the new time and place. It will also reset the status of all invited users.

Note that OfficeTalk does not place tentative appointments into users' diaries during a meeting reschedule. Instead, when the individual users reply that they can attend, a tentative appointment is added. When all users have replied that they can attend, then only then will all the tentative appointments become *firmed*.

Deleting a Meeting

Meetings will remain in the Meeting List until you, or any other user, delete them. OfficeTalk lets you delete a meeting which has already been booked. You can do this in the following way:

1. Press the 

button to bring up the Meeting List
2. Select the relevant meeting and press the 

button

Linking Meetings to Other Data

OfficeTalk lets you link meetings to other OfficeTalk data. You can do this in the following way:

1. Press the 

button to bring up the Meeting List
2. Select the relevant meeting and then select **Start Link** from the **Links** menu
3. Select another linkable item and press the  button above that items window or select **Finish Link** from the **Links** menu.

The meeting will now be linked to that item. A  symbol will appear next to the meeting. For more information on linking, see the **Linking** section in the chapter named **General OfficeTalk Features**.