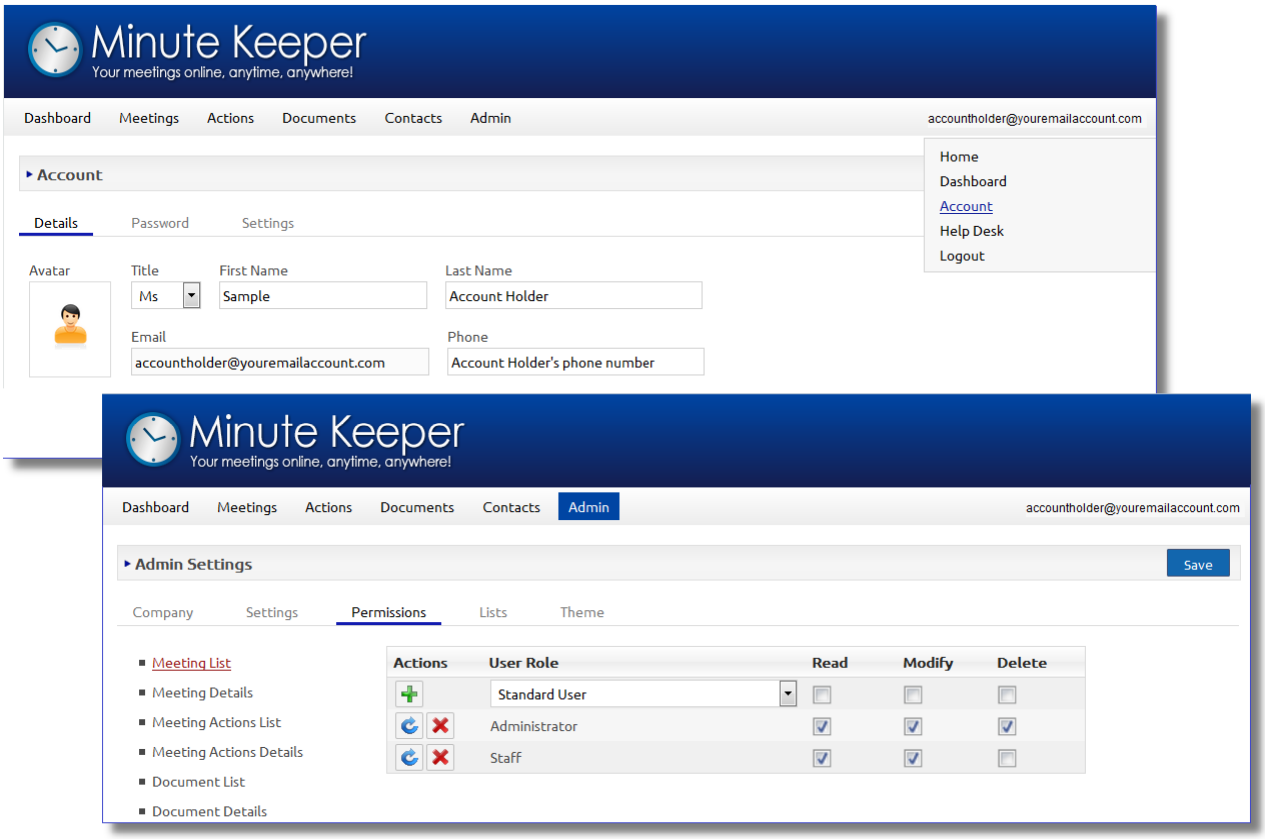
Minute Keeper (Web) Database

Initial Setup

Version 1.1



OST Database Group

Minute Keeper Database
Initial Setup

Thanks to:

- Microsoft® Corporation
- Martin Iannuzzi
- All those who have offered comments and corrections

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The sample data is fictional.

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

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

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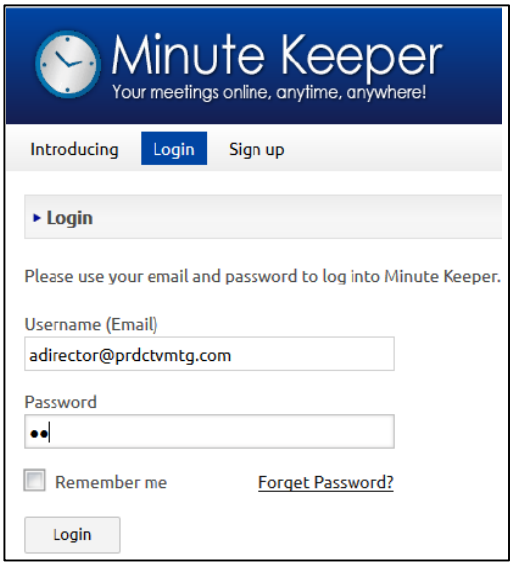
Initial Setup

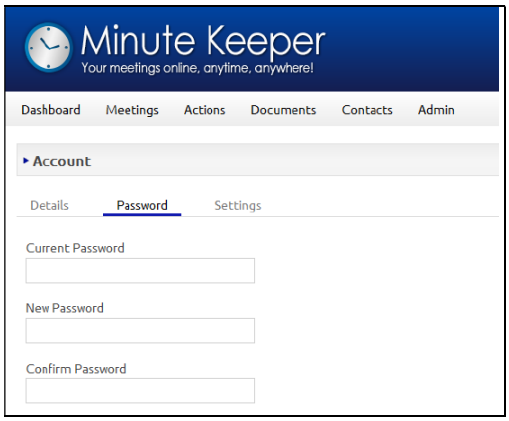
Logging In



1. Bring up the Minute Keeper (Web) Database (http://my.minutekeeper.com) using your web browser of choice.

2. Click on the **Login** menu option. Login to Minute Keeper using the username and password supplied.

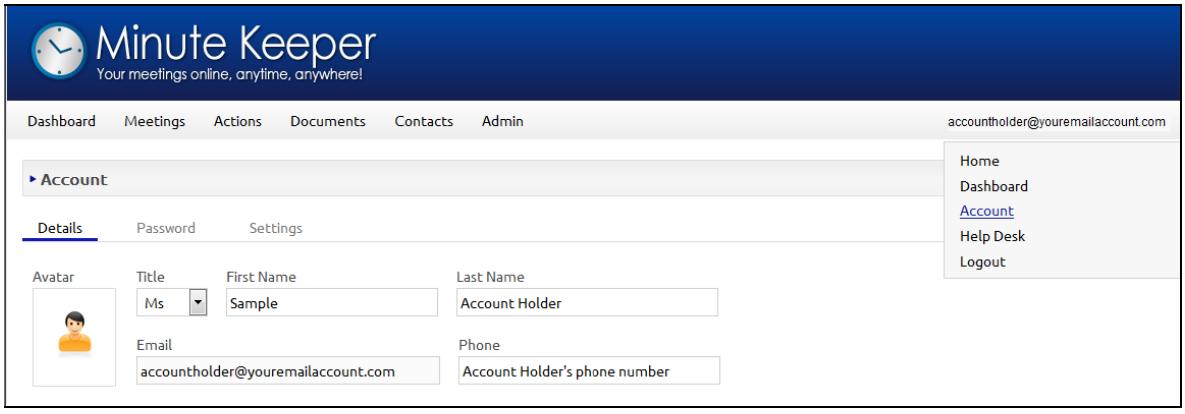
3. You may be prompted to change your password.



Account Setup

1. Click on your email address on the top right hand side of the Minute Keeper screen.

2. From the drop down menu, select: Account

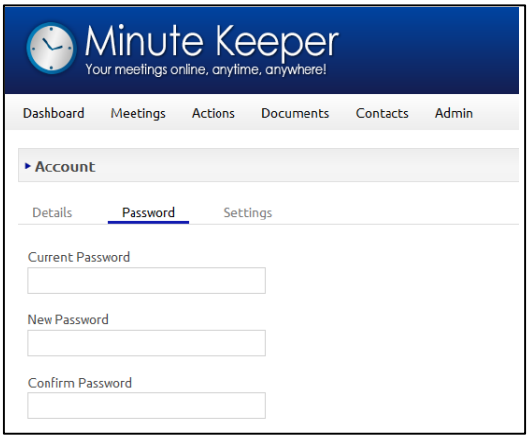


3. On this screen, edit the details of the primary user for your group.

4. Save your updates by clicking on the **Save** button on the top right of this screen.

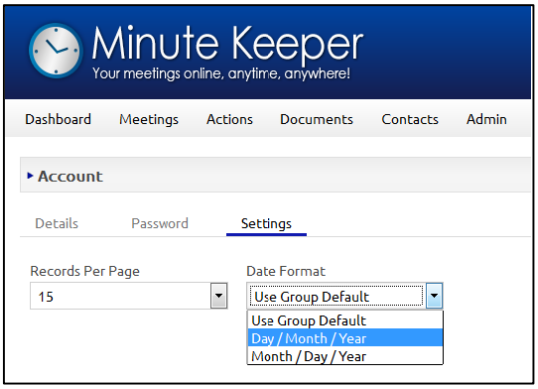
5. To change your current password, click on the **Password** tab. Enter your current password and your new password as indicated.

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



7. Click on the **Settings** tab to change the number of entries (records) you wish to view on the various list pages, and to select your default Date format.

8. Again, click on the **Save** button on the top right of this screen to save your changes.



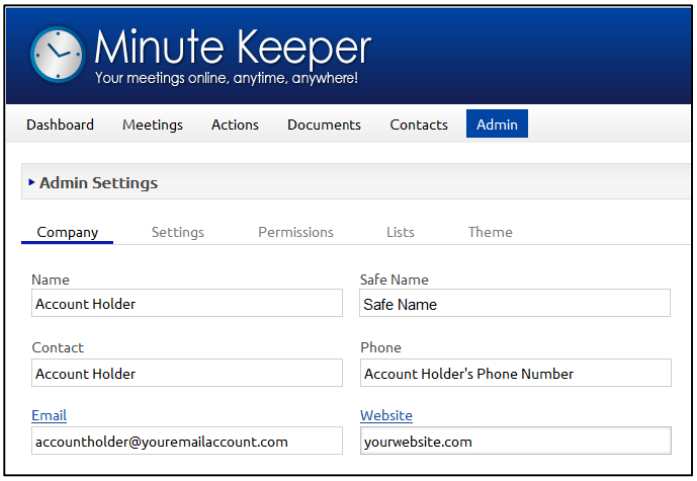
Setting up your Admin Settings

Adding/Editing Company Details

1. From the Main Menu click on the **Admin** button. The **Admin Settings** menu will be displayed along with the Company Details screen.

2. Edit your company details – Contact Name, Phone Number, primary Email Address and Website as required.

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

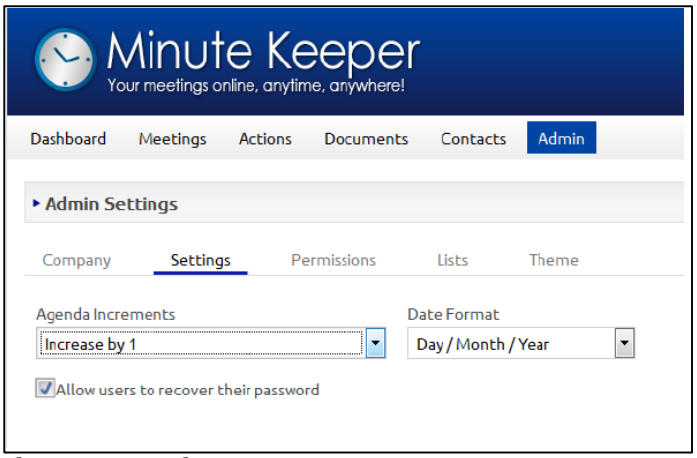


Adding/Editing Settings

4. Click on the **Settings** tab within the Admin Settings menu.

5. You may wish to auto-increment your agenda items by whole numbers (1, 2, 3, 4…) or by fractions (1.0, 1.1, 1.2, 1.3…) – select as preferred.

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



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

Managing Permissions

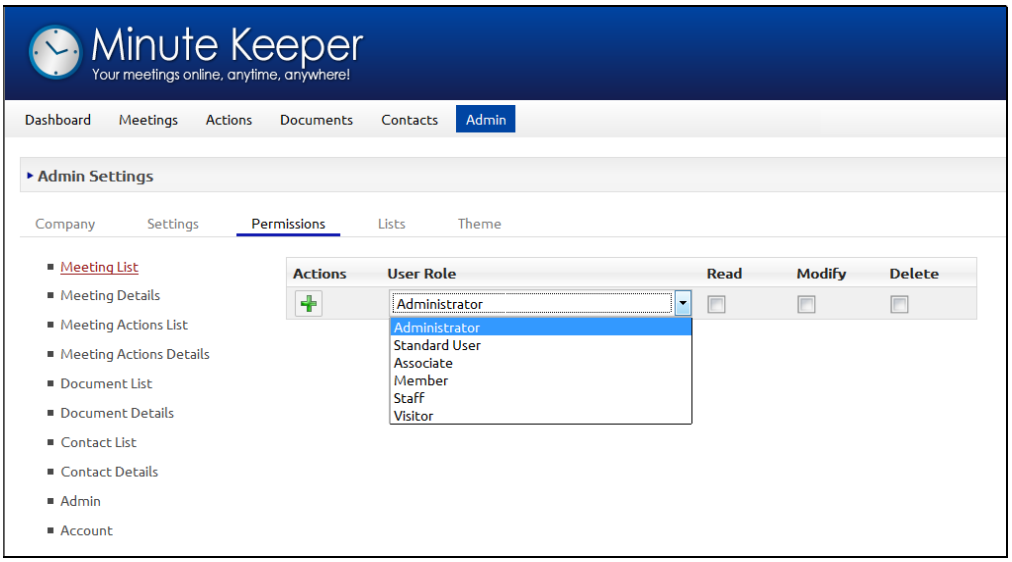
7. Click on the **Permissions** tab within the Admin Settings menu.

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

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

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

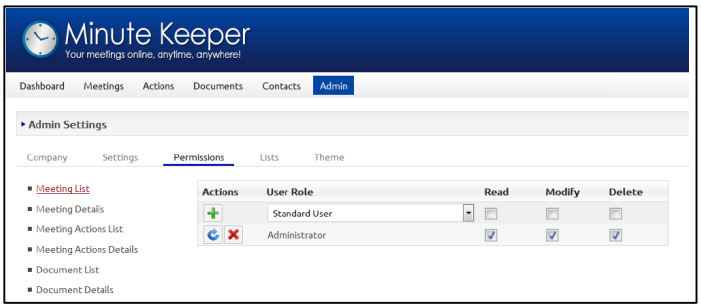
   9.1 Click on Meeting List on the menu on the left hand side of the screen.



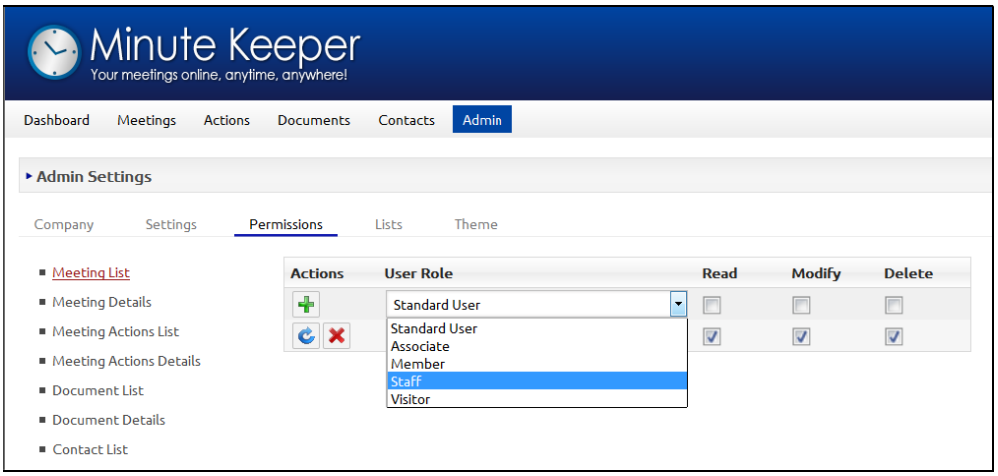
   9.2 Select: ***Administrator*** under User Role.

   9.3 Add ticks to the relevant check boxes only where you wish these users to be allowed to:
   - ☑ Read Meeting List entries.
   - ☑ Modify Meeting List entries and/or…
   - ☑ Delete Meeting List entries.

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



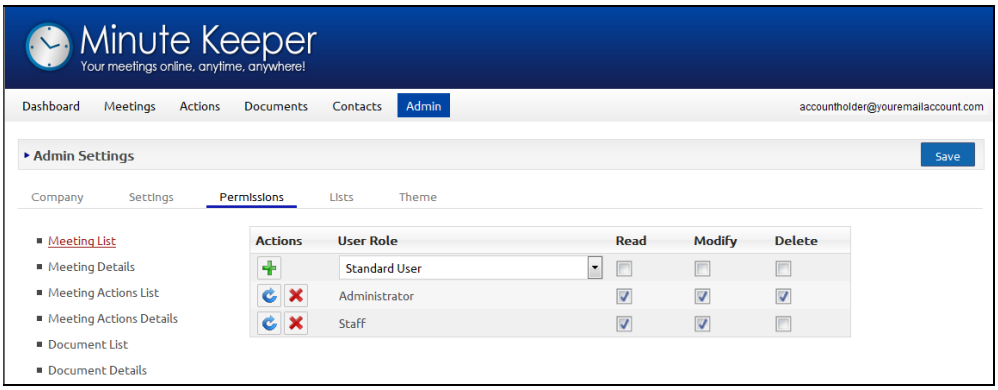
9.5 With Meeting List still selected on the left hand menu, select your next User Role, for instance: ***Staff***.



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

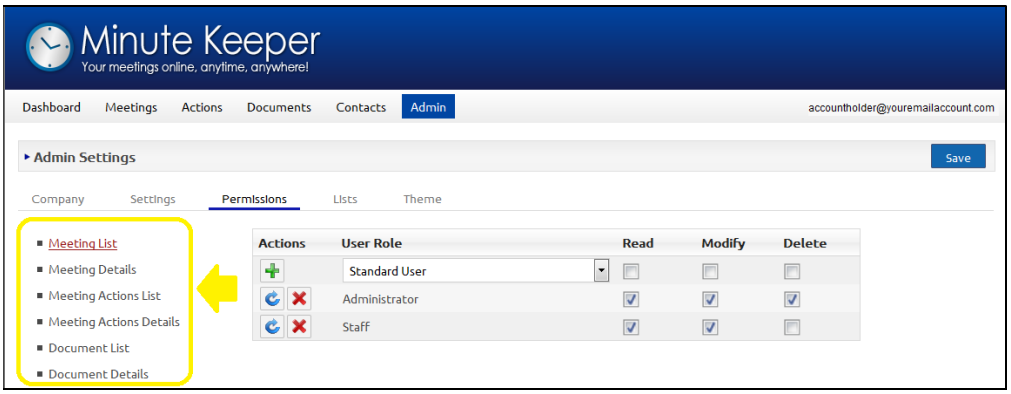
- Read Meeting List entries.
- Modify Meeting List entries and/or…
- Delete Meeting List entries.

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



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

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

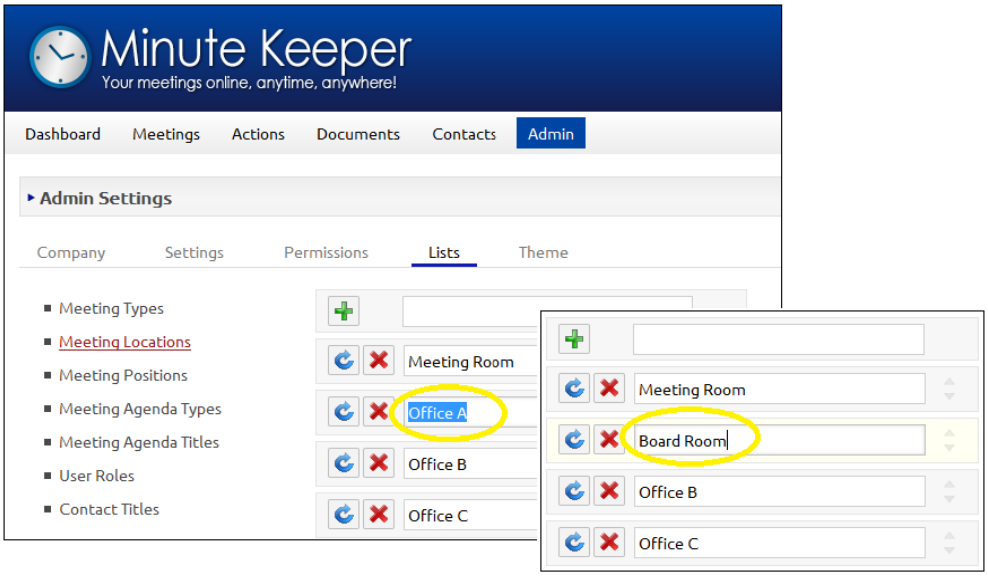


Managing Lists

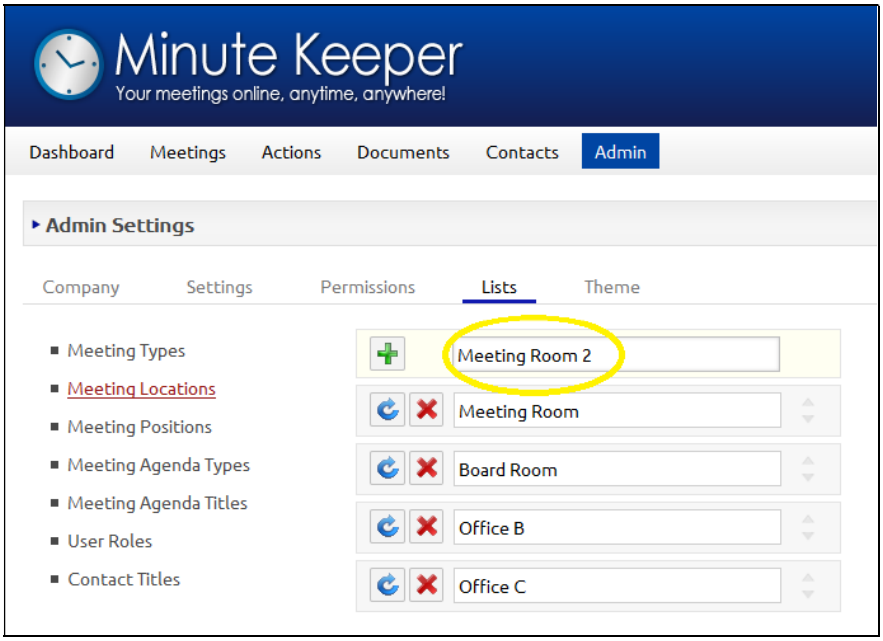
10. Click on the **Lists** tab within the Admin Settings menu. Again a set of menu options will be displayed on the left hand side of the screen. Clicking on these menu options will display a series of lists to the right of this menu. These lists are used within the various drop-down lists within the Minute Keeper application.

11. Click on each menu options in turn *(on the left of the screen)* and review the default list entries provided. Within each list, you are able to:

    11.1 **Edit** an existing entry by typing the change directly into the applicable text field and then clicking the **Refresh** button to the left of the entry.

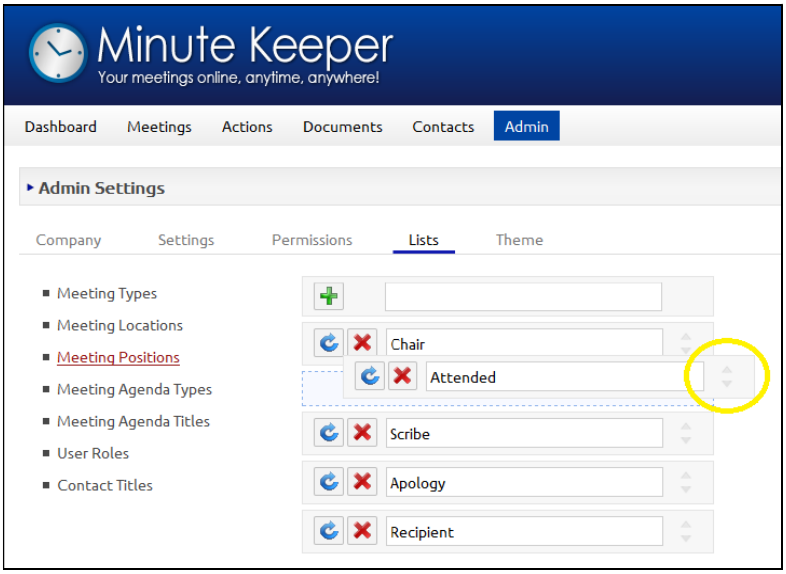


    11.2 **Add** an existing entry by typing the entry directly into the text field at the top of the list and then clicking the **Add** button to the left of the entry.

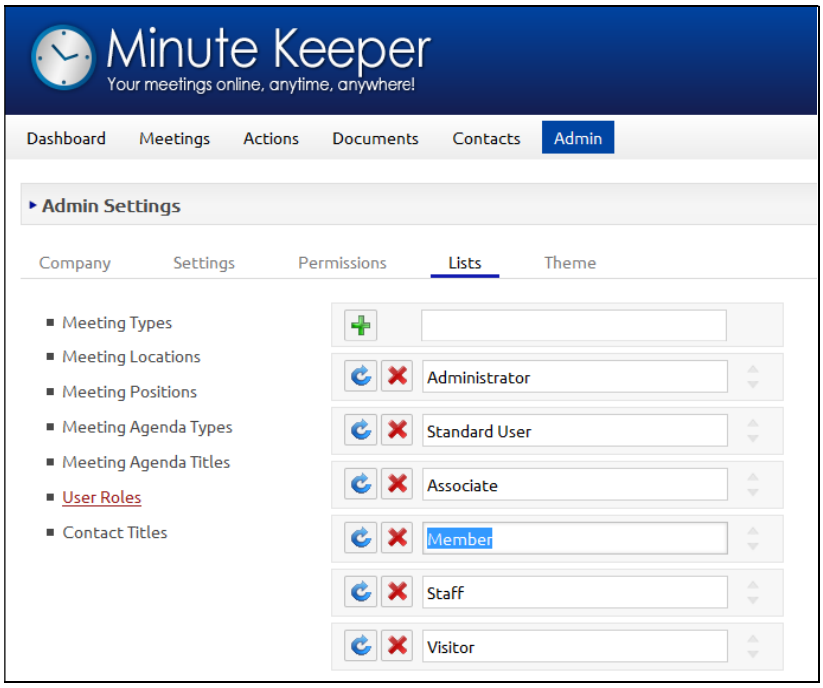


11.3 **Delete** an existing entry by clicking the **Delete** button to the left of the entry you wish to remove. Complete this action with due care.

11.4 **Reorder** existing entries by clicking the right-hand side of an entry and dragging it into the required list position.



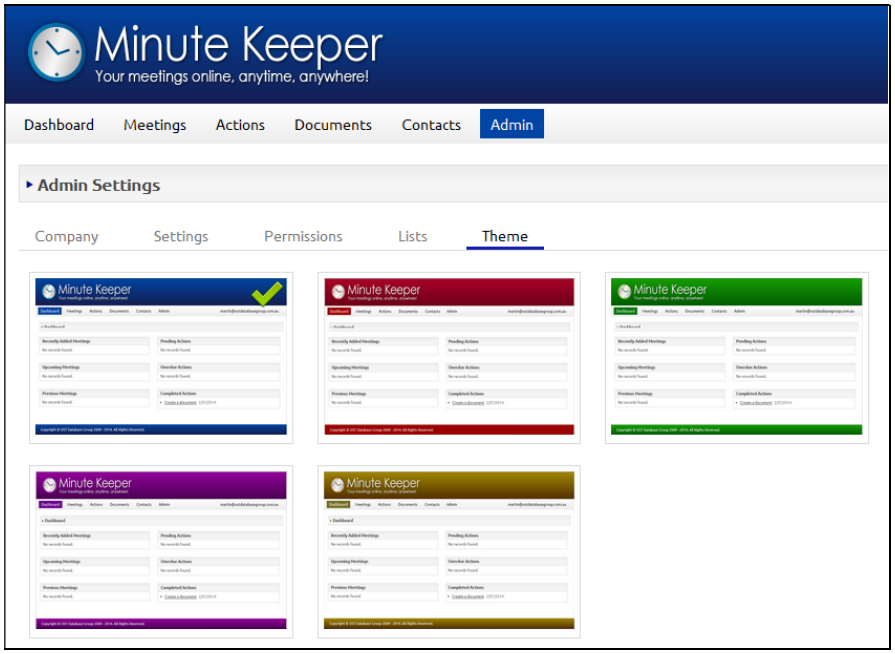
12. Note the menu option and list provided for you to add, edit and delete **User Roles** applicable to your user group or team.



Setting a Theme

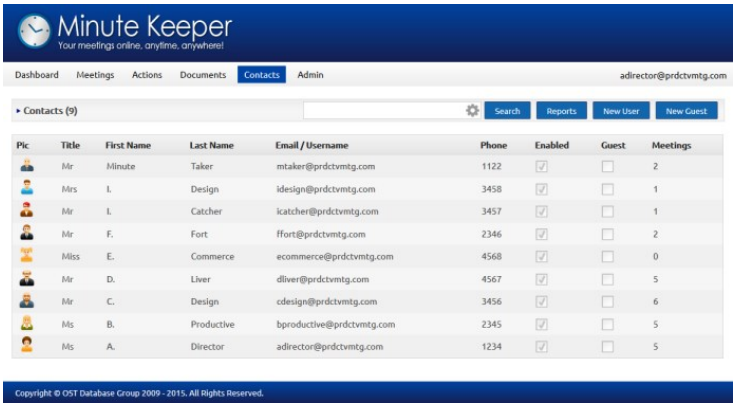
13. Click on the **Theme** tab within the Admin Settings menu.

14. Click on an image to select your theme preference.



Managing Contact Details

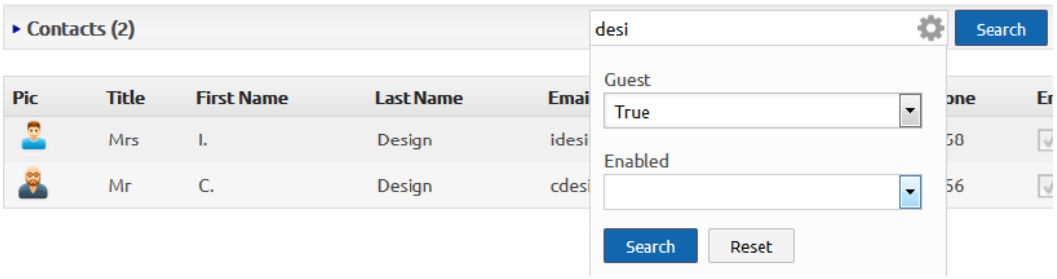
From the Main Menu click on the **Contacts** button. The Contacts List screen will be displayed.



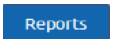
Viewing and Searching Contacts

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

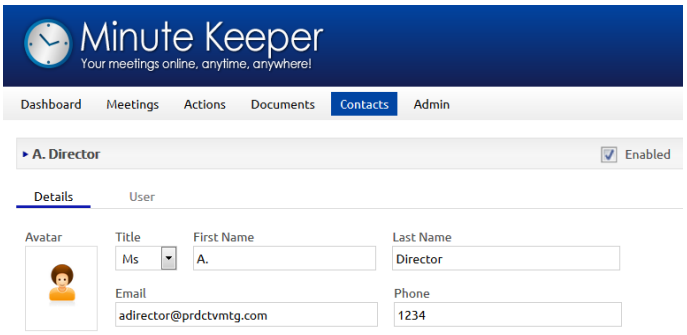
You are also able to click on the **Cog** button **within the Search box** so that you might also filter contacts that are Guests and are currently enabled. Drop down the lists attached to these entries and select your applicable preference. Click on the **Reset** button to reset all the filters.



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

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

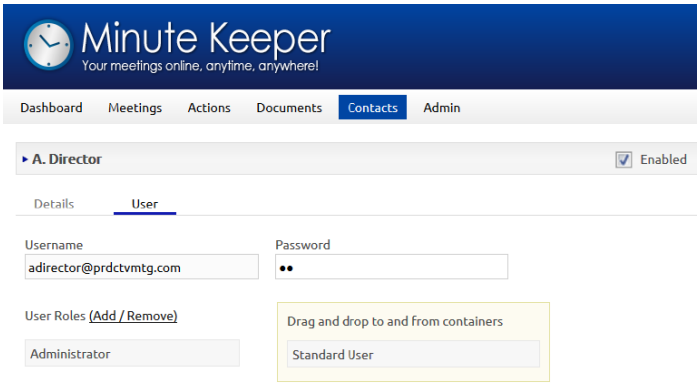
Adding Users and Guests



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

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

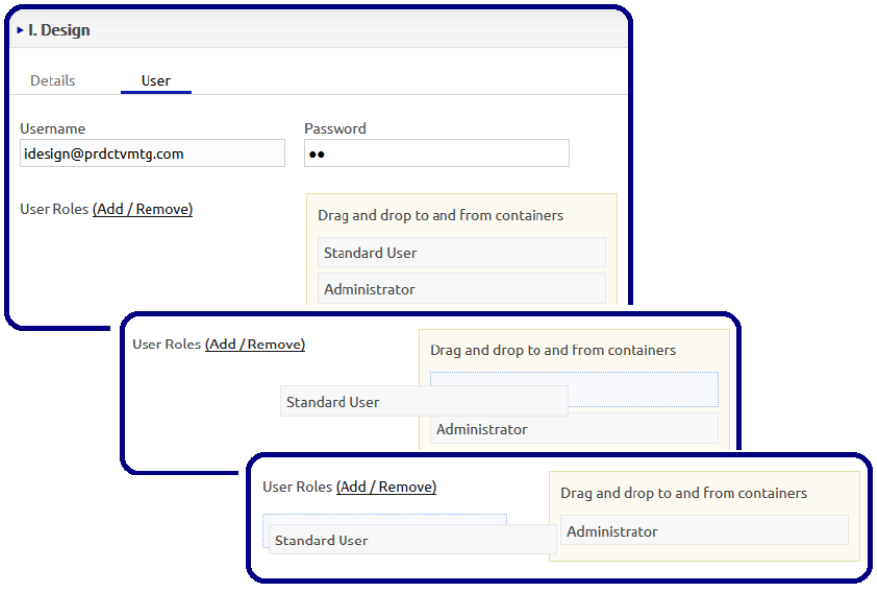
Note the **enabled** option on the top right of the contact detail. This can be used *(for instance)* where you need a contact to remain in the system - as they have meeting items attached to them - but they are not currently active in your team.

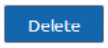


Where permissions allow, click on the **User** tab to add / edit the user's password, or to add or remove *(manage)* the user's roles.

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

Do the reverse to remove a role.



To delete an individual contact, you need to click on the **Delete** 

button on the top right of the contact detail page. You will be provided with two options - to make this user inactive or to delete them all together.

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

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