Lucid Meetings

New User Guide



Table of Contents

- Start Here: My Dashboard
- **Review Upcoming and Past Meetings**
- 3. My Action Items
- My Settings & Notifications 4.
- 5. **Daily Notification & 10-Minute Reminder**
- Create a Meeting 6.
- Add a Title, Date, and Start/End Time
- Add Meeting Attendees 8.
- **Remove Meeting Attendees** 9.
- 10. Organize and Edit the Agenda
- 11. Add Items to the Agenda (documents, etc.)

LUCID meetings

- 12. <u>Send Meeting Invitations</u>
- 13. <u>Review Invitation Details, Send Email</u>
- 14. <u>Reschedule, Cancel, Copy, Delete</u>
- 15. Start and End a Meeting
- 16. <u>Participate in a Meeting: Attendee</u>
- 17. <u>Run a Meeting: Facilitator</u>
- 18. <u>Add/Edit Notes & Action Items: During a Meeting</u>
- 19. <u>Add/Edit Notes & Action Items: After a Meeting</u>
- 20. Send Follow-up Email
- 21. Leave or Join Meeting Rooms



Start Here: My Dashboard

Link: https://meet.lucidmeetings.com

Dashboard: Overview

- Today's Meetings
- Two Weeks at a Glance
- Overdue Action Items
- Upcoming Action Items
- Upcoming Meeting Preparation





eting	Action Items (5)	l Records	Search	🚨 Tricia	B Suppo
Nov	ember 13, 2	2019			

Nov 10 – 23, 2019

Mon	Tue	Wed	Thu	Fri	Sat		
11	12	12 13		15	16		
E: Finish the report	4p Weekly Check-In 🗟	DUE: Introduce the ne	2p Category Manager				
E: Review buyer ag							
18	19	20	21	22	23		
	4p Weekly Status Upd			DUE: Report back to th			
-05:00)							
ltems		Action Items		Preparat	ion		
	2 Due Next	Week	Upc	Upcoming Meetings			
products at our n	ext 🗌 Ask Car	rla about the dairy-fre	e initiative Cate	Category Manager Weekly Call 🜩			

Edit

Category Managers

Thursday, November 14, 14:00 (55 minutes)

Dairy Buyers Team

Due Nov 25, 2019



Review Upcoming and Past Meetings



If you were invited to a meeting as a Gue **Records** link in the top navigation and c **Meeting History** to review all of the me been invited to attend.



			<u> </u>				
	iii Meetings	le Documents	Action Items 11	Notes			
	Meetings						
	E List View 🛗 Calen	dar View					
2	Upcoming Meeting	gs					
	Meeting		Date & Time	è			
	Weekly Status Update	2	November 19, 16:00				
	Weekly Status Update		November 2	6, 16:00			
3	Past Meetings						
	Meeting	👚 Dashboa	rd + Add Meet	ting 🔽	Ation Iten	as (2)	l Recor
	Weekly Check-In	Dashbua		ung 💌	ion iten		eeting Histo
		Retail Mar	nagers » River Run Fa	rmers » We	e xiy Leader	✓ Ac	ction Items
est, find the		Wee	kly Leade	ership	Call		otions
lick	on		r, January 9, 16:00 - d editable until Janu				ecisions sues
eetir	ngs you've	E Reco		🗎 Agen			arking Lot otes earch
					_		



My Action Items

Review Action Items:

- Click on Action Items
- Click Down Arrow next to item
- Edit or Mark complete

<u>Learn more about Action Items</u>

Action Items

Dashboard

+ Add action item

🔳 Menu

Showing 3 of 3 records, sorted by Date descending. **T** Filter

Action Item ≑

Action Item

Review buyer agreements be

Created by Tricia Harris, August 8, 2 Last updated by Tricia Harris, Decer

Action Item

Create the facilities report for

Created by Tricia Harris, August 5, 2 Last updated by Tricia Harris, Decer

Action Item

Introduce the new products a

Created by Tricia Harris, June 18, 20 Last updated by Tricia Harris, Decer





	10 25	50 100 250	Dates 🗙 🏾 🎜
	Room 🗢	Date 💌	Actions
efore the next meeting , 2019 ember 24, 2019	Stonegate Farmers	Dec 30, 2019 Upcor Edit Mark c	• complete
or the next meeting. , 2019 ember 24, 2019	Stonegate Farmers	Dec 26, 2019 Upcoming	*
at our next meeting 2019 ember 8, 2019	Shepherds Purse Cheeses	Dec 11, 2019 Overdue	*

My Settings & Notifications

Click Your Name to Access:

- Profile Settings
- Display Preferences
- Email Notifications

<u>Learn more about Account Settings</u>

The Dashboard

Notification Preferences

Enable meeting reminders

Receive 10-minute reminder email Check this box to receive a reminder email approximately 10 minutes before each meeting.

Enable daily calendar email

Receive your daily calendar via email Check this box to receive a morning reminder email on days with scheduled meetings.

Enable weekly calendar email

 Receive your weekly calendar via email Check this box to receive a weekly reminder email with scheduled meetings and open action items.

Enable RSVP notification email

Receive attendee RSVP notifications via email Check this box to receive an email when attendees RSVP for a meeting you create.



Action Items (5) + Add Meeting 📋 Records 💄 Tricia Search Account Profile Settings Tricia Harris » Set Notification Preferences Display Preferences Set Notification Preferences Email Notifications Authorize Applications Browser Check 🕞 Log Out



Daily Notification & 10 Minute Reminder

Get Ready for Today's Meetings

Thursday, January 9, 2020

BUYER-SUPPLIER STATUS UPDATE 2:30 PM - 3:25 PM London (GMT +00:00)

Room: Stonegate Farmers

Purpose: Review latest updates, discuss weekly specials, and plan the week ahead.

Invited: Amanda Richardson, Ed Riley, Fred Meisner, Janice Kramer, Steve Ritchie, Stewart Johnson, Tricia Harris, Trina Charlton

View meeting

WEEKLY LEADERSHIP CALL 4 PM - 4:55 PM London (GMT +00:00)

Room: Stonegate Farmers

Purpose: Review latest updates, discuss weekly specials, and plan the week ahead.

Invited: Amanda Richardson, Ed Riley, Fred Meisner, Janice Kramer, Steve Ritchie, Stewart Johnson, Tricia Harris, Trina Charlton

View meeting

Related Action Items

Action Item

Review payroll stubs for accounting.

Room: Stonegate Farmers Created by Tricia Harris, August 5, 2019 Due Monday, January 13th View action item or Mark as complete

Today's Meetings & Related Action Items



STARTING IN 10 MINUTES! Weekly Leadership Call

Thursday, January 9, 4 PM - 4:55 PM London

Click to open the meeting »

Or paste this link into your browser: https://demo.lucidmeetings.com/lucid/invite/1016564536705613

Instructions for accessing the meeting

Please visit:

https://demo.lucidmeetings.com/lucid/invite/1016564536705613

You will need a modern browser and an internet connection to access the meeting. There is nothing to download or install.

Meeting Agenda

Thursday, January 9, 2020

Purpose: Review latest updates, discuss weekly specials, and plan the week ahead.

Invited to this Meeting

Amanda Richardson (The Dalton Company), Ed Riley (Stanton Team), Fred Meisner,

10 Minute Reminder Email

Create a Meeting:

- 1. Select **Room**
- 2. Select **Template**
- 3. Click Schedule meeting

Learn more about Meeting <u>Scheduling</u>



🗐 Calendar

■ Menu

Site Manager

🗜 Log Out

Meeting Rooms

Dairy Buyers

Belton Farm

Butlers Cheeses

Category Managers



Create a Meeting



Add a Title, Date, and Start/End Time

Title, Date and Time:

- 1. Review/Update Title
- 2. Choose Date, Start/End Time, and/or Repeat
- 3. Click "Save and next"





Meeting type (required)

Supplier Check-In Meeting 🔷 🌲

Select a Meeting Type to prefill your agenda. If you're unsure which type to use, select the Blank Agenda or Basic Agenda to start. You can always switch to a different agenda later if necessary.

ng title <i>(requ</i>	ired)						
t Status Update							
ng date	Start time	End time	Time zone				
/2019	19:00	19:55	GMT -05:00 US/Eastern	\$			
epeat							
e and next	or Cancel						



Add Meeting Attendees

Next, add Meeting Attendees:

1. Select Room Members,

2. Select Guests, OR

Add new members/guests using email address

To add more attendees, select the Attendees tab and click "Add attendees"

🗎 Agenda	L Attendees	Audio	Instructions	Settir
Attendees				
Showing 3 of	3 records, sorted	by Name asce	ending. T Filter	
Name 📤	Cor	npany ≑	Time Zone 🌲	Meeting Rol
Ed Riley	y Stai	nton Team	London	Participant
SJ Stewar	t Johnson Self		US/Eastern	Participant





Add Attendees

Members may see all prior meeting records, search meeting room history, and be assigned to action items; guests may only see meetings to which they have been invited.

Select Room Members

The following room members are available for quick selection.

Select all current members







Select Room Guests

The following guests are available for quick selection.

Select all prior guests





Remove Meeting Attendees

To Remove an Attendee:

- Navigate to the Meeting page and select the Attendees tab.
- Beside the person's name, use the down arrow to select "Remove Attendee."

Attendees
Showing 8 of 8 records, s
Name 📤
Amanda Richardso
Ed Riley
FM Fred Meisner
JK Janice Kramer
SR Steve Ritchie



ndees	Audio	🖻 Ins	tructions	\$	Settings	: Mo	ore					
						🖾 Send	l invita	ation	ıs	A	dd atte	ndees
, sorte	ed by Name asce	nding.	Filter			10	25	5	0	100	250	C
	Company ≑		Time Zone	\$	Meeting I	Role ≑	RSV	P ≑			Ac	tions
son	The Dalton Com	npany	Los Angele	S	Guest		Sent	on	01/(07/202	20	*
	Stanton Team		London		Participar	nt	Sent	on		07/202	20	*
	Self		London		Guest		Sent	or	y	Edit Chang Chang	e RSVP	
	Self		Los Angele	S	Guest		Sent	or		Send i	nvitatio	
	Self		Los Angele	s	Guest		2 ent	or		Remov Conta	ve atter ct	ndee



Organize and Edit the Agenda

볩 Agenda	Attendees	Audio	lnstructions	🏶 Settings	: More			
Agenda							🔎 Edit 🛛 🗄 Organize	2
▼ 1.0 Wel	come							
▼ 2.0 Disc	ussion			<	\$ 1.0 We	elcome		

On the Meeting page:

- Click **Organize** on the Agenda tab to Add arrange items
- Click Add another agenda item to add more items
- Use the Arrows to move items or click and drag
- After organizing, click **Edit** to add and change text





Add Items to the Agenda

Add documents, presenters, action item reviews, and more.

- First, click **Edit** on the Agenda (see previous slide)
- Next to the agenda item, click the down arrow
- Use the drop down menu to add a document, URL, presenter, timer, motion, or tag
- Select "Add list" to review Action Items in the meeting

Learn more about working with agendas

~	2.0 R
	1.
	2.
	3.
~	3.0 N
	Add do
S	Add a
	Add a Add pr
•	
• •	Add pr
• • •	Add pr Set tim
• • •	Add pr Set tim Add lis
• • • •	Add pr Set tim Add lis Add m







Send Meeting Invitations

To Invite Meeting Attendees:

- When your meeting is ready, select "Send invitation email"
- If the prompt does not appear, send invitations using the down arrow next to the meeting title

<u>Learn more about inviting attendees</u>





Weekly Status Update 🗸

Friday, January 3, 1 PM - 1:55 PM US/Eastern 🛗

Tell people about this meeting.

You still need to send invitations to 6 people.

Send invitation email

ail or Skip this step



Tip 1 of 2 🔶

Review Invitation Details, Send Email

In the next step, review:

- Message Delivery Priority and Sensitivity Level
- Options to include the agenda, calendar file, and **RSVP** email
- Recipient list
- Click "Send email"

Learn about how Lucid works with common calendars





All email messages are important, but some are more important

How sensitive it is to disclose this message to people other than

Amanda Richardson, Ed Riley, Fred Meisner, Janice Kramer, Steve Ritchie, St

People who have not yet received an invitation

People who have not yet received an UPDATED invitation

Amanda Richardson, Ed Riley, Fred Meisner, Janice Kramer, Steve Ritchie, St

Amanda Richardson, Ed Riley, Fred Meisner, Janice Kramer, Steve Ritchie, St

MEETING INVITATION **Buyer-Supplier Status Update**

Wednesday, January 8, 1 PM - 1:55 PM US/Eastern

View Meeting »

Or paste this link into your browser: https://demo.lucidmeetings.com/lucid/invite/9958338554194197

Instructions for accessing the meeting

Please visit:

https://demo.lucidmeetings.com/lucid/invite/9958338554194197 You will need a modern browser and an internet connection to access the meeting. There is nothing to download or install. Test your system here.

Meeting Agenda

Wednesday, January 8, 2020

Purpose: Review latest updates, discuss weekly specials, and plan the week ahead.

Invited to this Meeting

Amanda Richardson (The Dalton Company), Ed Riley (Stanton Team), Fred Meisner, Janice Kramer, Steve Ritchie, Stewart Johnson, Tricia Harris (Belton Farm), Trina Charlton (Aqua Supply Co.)

Agenda Items

1.0 Welcome

Let's take a moment to get settled and review past action items.

Meeting Invitation Email



Reschedule, Cancel, Copy, Delete

Use the down arrow next to the meeting name to access the **Meeting Actions** menu.

Common actions include:

- Reschedule
- Cancel
- Copy
- Delete

Retail Managers » River Run Farmers » Buyer-Supplier Status Update

Buyer-Sup

Friday, January 10, 9



Purpose: Review la

Desired Outcom

Click to add desired ou





nnlier 9	Status	Update	~				
•••						1	
9 AM - 9:55 AN	/I US/Eastern (##		Refresh			
				Change your RSVP	Yes		
our meet	ing setup	is complet	Ċ	View report			
ase return at	9 AM US/Easte	ern on Jan 10, 202	٠	Edit settings		g session.	
			•	Add more people			
				Download attende	es		
			٢	View requests 0			
latest updates	discuss woo		\boxtimes	Send invitations			
atest updates	s, discuss wee	kly special and i	i	Reschedule meetin	g		
nes			0	Cancel meeting			
outcomes for th	is meeting.		Ē	Copy meeting			
			F	Move meeting			
Attendees	< Audio	🖻 Instructions		Make template			
			Ê	Delete meeting			
			_			6	



Start and End a Meeting

Notes Tricia Harris @ 11:20 AM Meeting notes should be comprised of **important facts**. Basic example: "Ted is flying to Denver on Tuesday." The sentence captures who, what, when, and where.

Issues and decisions are also important to record. Capture **action plans** that result from the issues raised or decisions made. Example: "Sarah will book the flights and hotel, and Sally will purchase conference tickets."

Exit Meeting

X End Meeting

Start a Meeting:

Click "Start your meeting now" on the meeting home page OR on your Dashboard

End a Meeting:

Click on "Meeting" and "End **Meeting**" in the bottom tray







Participate in a meeting:

- View agenda items (top)
- Add/present a document (with presenter role)
- Add Notes and Action Items (with note taker role)
- Chat with other attendees (right)

Learn more about participating in meetings





Participate in a Meeting: Attendee

Weekly Status Update			
	50	🚨 Attendees	×
2.0 Weekly Updates Add document Add document Document the past week.	1	 Present 3 Amanda Richardson FM Fred Meisner Tricia Harris Facilitator Absent 2 	View atte
• preview	1	R Chat	×
this week Tricia Harris @ 9:21 AM rials for suppliers January 14, 2020 Tricia Harris @ 9:23 AM ricia Harris @ 9:23 AM Tricia Harris @ 9:25 AM Tricia Harris @ 9:25 AM		Group Chat Tricia Harris Where is Stewart today? Amanda Richardson I'm not sure. He's not in the offi I just remembered - he had a cu is running late.	
★ Decision III Issue Rearking Lot			C
Decision, Issue, Parking Lot item		Type to chat and hit enter to se Group + New	nd.
📞 Audio		• Time Remaining:	37 m 59 s

Exit meeting, View agenda, Search, view Audio





Run a Meeting: Facilitator

Facilitate a meeting: (see previous slide for more)

- Advance the agenda
- Exit, Break, or End the Meeting
- Edit the Agenda, Search records, change Audio preference
- Change the Meeting Timer
- Invite More People
- Change Attendee Roles

Learn more about facilitating a meeting

2.0 3.0 4.0			Weekly	Status Upda	e	8 .	Attendees	Invite mor
2.0 3.0 4.0	2.0 Weel	kly Updat	tes		next >	1.	Present 3 Amanda Richardson	Invite More
	Add docume	nt 🖄 Add m	otion	Advand	ce agenda	_	M Fred Meisner	2 🖵
Everyone shares updates fr	om the past week.						Tricia Harris Facilitate	or
Weekly Specials.pdf 12.95 KB • added Today at 9:16	AM • preview				Show	_	Absent 2 J Stewart Johnson	
Notes						-	Trina Charlton	
We'll run 3 weekly speci				Trici	Harris @ 9:21 AM		Dhat	>
Create marketing ma				Trici	Harris @ 9:21 AM	Tr	oup Chat icia Harris here is Stewart today?	9:25 AM
 Most specials this we In January, the team Next summer, we'll a 	eek are holiday-theme will plan yearly specia	lls.			Harris @ 9:23 AM Harris @ 9:25 AM	l'n Lju	manda Richardson n not sure. He's not in the ust remembered - he had a nning late.	
Add note	em 🛨 Decision	Issue	Parking L	ot	Z			
, or End Meeting	g					Ту	pe to chat and hit enter	to send.
						Gr	roup + New	
								ining: 41 m 43 s

Ex









Add/Edit Notes & Action Items: During a Meeting

Meeting Notes (facilitator & note taker role)

- To add a note during a meeting, click "Add Note," type your note, and Save.
- To **Edit** a note, simply click on the note text to start editing.

<u>Click here to learn about tagged notes</u>

Action Items

- To **Add** an Action Item, click "Action Item," and type your text.
- Select an Owner and Date, then **Save**.
- To **Edit** an Action Item, click on the text, owner or date to make changes.



What will you b	e proud to share	about this proje	ect 3 months	after the project	launch?
Notes					
🔎 Add note	Action item	★ Decision	Issue	Parking Lot	
Notor					
Notes There is now a	process and syst	tem in place to	identify:		Tricia Harris @

- 1. Who attended a meeting
- 2. What they agreed to, and
- 3. When it took place.
- Locate the original project documents for archiving

Ed Rile	y ×				
🛅 Janua	ary 15, 2020				
I Add	tag				
Save	or Cancel				
Add note	Action item	★ Decision	Issue 🛤	Parking Lot	





G

Add/Edit Notes & Action Items: After a Meeting

To add or edit a note or action item after a meeting, click on the **Notes** tab on the meeting page and select **Edit**. When finished, click **Done editing**.

Meeting Notes

- To add a note, select **New Note** under the correct agenda item.
- To **Edit** a note, simply click on the note text to start editing.

Action Items

- To add an Action Item, click "**New Action Item**" and type your text. Select an Owner and Date, then **Save**.
- To **Edit** an Action Item, click on the text, owner or date to make changes. <u>Learn</u> more about Action Items.





Send Follow-Up Email

Custom

Message

- 1. When your meeting notes are complete, select "Send follow-up email" on the meeting page.
- 2. In the next step, add a custom follow-up message. (optional)
- 3. Review Message Delivery Priority, Sensitivity Level, Options, and Recipient list.
- 4. Click "Send email."

Learn more about sharing Meeting Records

Weekly Leadership Call 🗸							
	ary 9, 11 AM - 11:55 AM US/Eastern able until January 12, 4:12 PM						
	Your meeting has ended. Send a followup email to attendees (8) when you're ready.						
	Send followup email or Skip this step						



MEETING NOTES Weekly Leadership Call

Hi everyone,

Thanks for attending the meeting on such short notice. Next week, be sure to plan for 1.5 hours on Thursday to discuss the latest projects in the queue.

Thanks,

Ed

You can find the complete notes from our meeting here: https://demo.lucidmeetings.com/lucid/invite/1015891454558819

Meeting Record

Thursday, January 9, 2020

Purpose: Review latest updates, discuss weekly specials, and plan the week ahead.

Meeting Attendance

In Attendance

Amanda Richardson (The Dalton Company), Ed Riley (Stanton Team), Fred Meisner, Janice Kramer, Stewart Johnson, Tricia Harris (Belton Farm)

Regrets

Steve Ritchie, Trina Charlton (Aqua Supply Co.)

Action Items

Action Item	Assigned	Due Date	Completed	
Locate the original project documents for archiving	Ed Riley	Jan 15		

Follow-Up Email

- 1. Select an Organization/ **Category** in the left navigation under Meeting Rooms.
- 2. To Leave a Meeting Room, click the down arrow, and select **Remove myself.**
- 3. To Join a Meeting Room, click the down arrow and select Add myself.



Menu

🗜 Log Out

Retail Managers Dundee Farms Fountain Lakes River Run Farmers Store Managers Cranberry Corner

Rockdale Foods



Leave or Join Meeting Rooms



55

Open Rooms

Manager

River Run Farmers

You may preview or join any of the following open rooms Showing 2 of 2 records, sorted by Room ascending.▼ Filter

Room 📤	Meetings	Members	Guests	Actions
15 Acre Dairy	0	1	0	~
Jackson Stores	6	1	4	~
			Room hor	ne
		3	+ Add myse	lf



Remove myself

☆ Hide from menu