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## SECTION 2- USING THE MEETING TOOL

### Working With an Existing Event (Meeting)

#### 2.0 ADDING A NEW EVENT (Meeting)

From the IEEE Calendar- List of Events page, click the New Event tab to create a new event.

The screenshot shows the IEEE Calendar - List of Events page. The top part of the page has a green header with the text "IEEE Calendar - List of Events". Below the header, there is a "Filter by Business Unit" dropdown menu set to "Please Select". A table with three columns is shown: "Start Date", "Business Unit", and "Meeting Name". The first row of the table is: 12/8/2012, Technical Activities, EDS AdCom Meeting in conjunction with IEDM. The "New Event" tab is highlighted with a yellow arrow. A red circle highlights the "New Event" tab in the bottom screenshot, and a red line connects it to the "New Event" tab in the top screenshot.

Start Date	Business Unit	Meeting Name
12/8/2012	Technical Activities	EDS AdCom Meeting in conjunction with IEDM

Start Date	Business Unit	Meeting Name	Edit Event	Agenda Home
12/8/2012	Technical Activities	EDS AdCom Meeting in conjunction with IEDM	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
12/5/2012	Technical Activities	ComSoc Board of Governors2 2012	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/15/2012	Technical Activities	Board of Directors, IEEE EMC Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/13/2012	Technical Activities	IEEE Computer Society Board of Governors (Nov. 2012)	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/12/2012	Technical Activities	IEEE Computer Society Board of Governors Caucus	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/12/2012	Technical Activities	IEEE Computer Society Executive Committee (Nov 2012)	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/10/2012	Member and Geographic Activities	MGA Board Meeting (10 November 2012)	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/9/2012	IEEE USA	IEEE-USA Board of Directors Meeting	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/8/2012	Technical Activities	IEEE Conferences Committee	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/3/2012	Technical Activities	IEEE Nuclear Plasma Sciences Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/13/2012	Technical Activities	IEEE Robotics and Automation Society Ad Com	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/7/2012	Technical Activities	2012 IAS Q3 ExecBoard Meeting	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/4/2012	Technical Activities	IEEE Signal Processing Society Board of Governors Meeting	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/1/2012	Technical Activities	Consumer Electronics Society AdCom Meeting Face-to-Face Meeting	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
9/23/2012	Technical Activities	IEEE Photonics Society AdCom/BoG	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>

1 2 3 4 5 6 7 8 9 10 ...

The Add New Event Page has 3 Sections

Calendar New Event

Add New Event - [HELP](#)

**All Users (\* - Required Fields)**

\* Title / Name 1

\* Business Unit Please Select

\* Meeting Type

\* Meeting Group

\* Start Date [List of Holidays](#)

\* End Date

\* Contact Name

\* Contact Email

Contact Phone

Venue 2

State /Province

City

Country

Venue URL

This event should NOT appear in the IEEE calendar

**Agenda Tool Users Only**

Start Time (24hr date format e.g. 0830)

Duration (e.g. 9am - 5pm)

Agenda Policy

Attachment Policy

Contributors

Custom Agenda Header 3

(Please enter "Tool" if you plan on using the agenda tool, or provide an alternate URL to your events agenda. Leave blank if you do not want your agenda linked to the IEEE calendar.)

Clear Form Submit

## Section 1: All Users (\* - Required Fields)

**Title/Name:** Enter the name of your meeting. For example, Technical Activities Board Meeting

**Business Unit:** From the dropdown menu, select the Organizational Unit that applies to this meeting. If you are a Society Council, select Technical Activities for business unit.

**Meeting Type:** From the drop down menu, select what type of meeting this is (for example, (committee, board, etc).

**Meeting Group:** Select which committee, board, etc applies to this meeting.

**Start Date:** Enter the date on which the meeting starts. Click the calendar to select the start date or type in a date. The format is dd-mm-yyyy.

**List of Holidays:** Confirm meeting does not fall on a holiday by checking this list of holidays by country.

**End Date:** Enter the date on which the meeting ends. Click the calendar to select the end date or type in a date. The format is dd-mm-yyyy.

**Contact Name:** Enter the name of the individual who input the meeting, or who should be contacted by the Agenda Tool Administration team if there is a problem with the event or information is needed about the event.

**Duration:** Enter the start and end time for the meeting. This is a free text field. For example: 9:00 am – 5:00 pm PDT.

**Meeting Room:** Enter the room name for the meeting. For example, Board Conference Room

**Agenda URL:** Use this field if you have a separate url for your meeting agenda in pdf form that you wish to display. You may also use this field to link the agenda to the IEEE calendar. To link the agenda to the calendar, enter 'Tool' in this field.

**Add New Event Help:** Located as a hyperlink at the top center of the page, this popup provides definitions of most fields for this page.

## **Section 2: Optional Fields**

**Contact Phone:** Enter the phone number for the individual to be contacted.

**Venue:** Enter the hotel or conference location for the meeting. For example, Hyatt Regency Hotel.

**State/Province:** Enter the state or province where the meeting will take place.

**City:** Enter the city where the meeting will take place.

**Country:** Enter the country where the meeting will take place.

**Venue URL:** If available or known, enter the url for the hotel or conference location for the meeting.

**This Event should NOT appear in the IEEE calendar:** All meetings are automatically listed in the public list of meetings that displays on the [www.ieee.org](http://www.ieee.org) website. If you do not wish to have this meeting listed, please check this box. You will however still be able to see the meeting in the Meeting and Agenda Tool Calendar and work within it from the Agenda Homepage.

## **Section 3: Agenda Tool Users Only Section**

If you wish to create an agenda for your event (meeting/teleconference) the following data fields will need to be populated.

**Start Time:** Enter the start time for the meeting. You must enter the start time in the 24 hour format. For example if the meeting start time is 8:30 am, the time would be entered as 0830. If the meeting start time is 1:00 pm, the time would be entered as 1300.

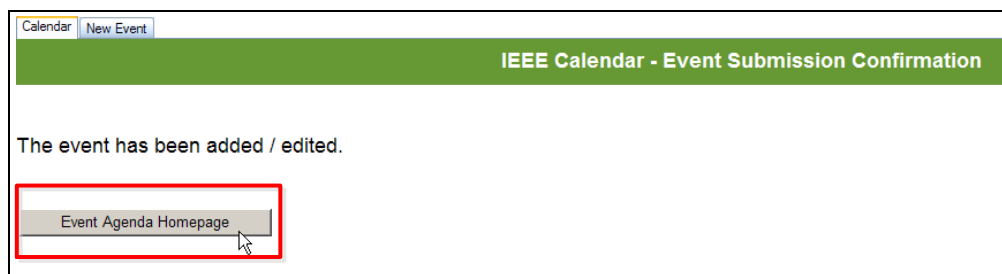
**Agenda Policy:** Choose the appropriate level of security for this meeting's agenda. Options are: everything is public (can be viewed by anyone who has the agenda url), IEEE Members and Staff only can view the agenda, or the agenda is private to a certain committee. For the last option, choose 'Agenda shares the access of the Attachment Policy' and make the appropriate selection in the Attachments Policy field. Please note, once a selection is made it cannot be changed later in the build of the agenda.

**Attachments Policy:** Choose the appropriate level of security for viewing attachment to this meeting's agenda. Attachments may be public, viewable to IEEE Members and Staff with a IEEE Account, or restricted to certain committees. Please note, once a selection is made it cannot be changed later in the build of the agenda.

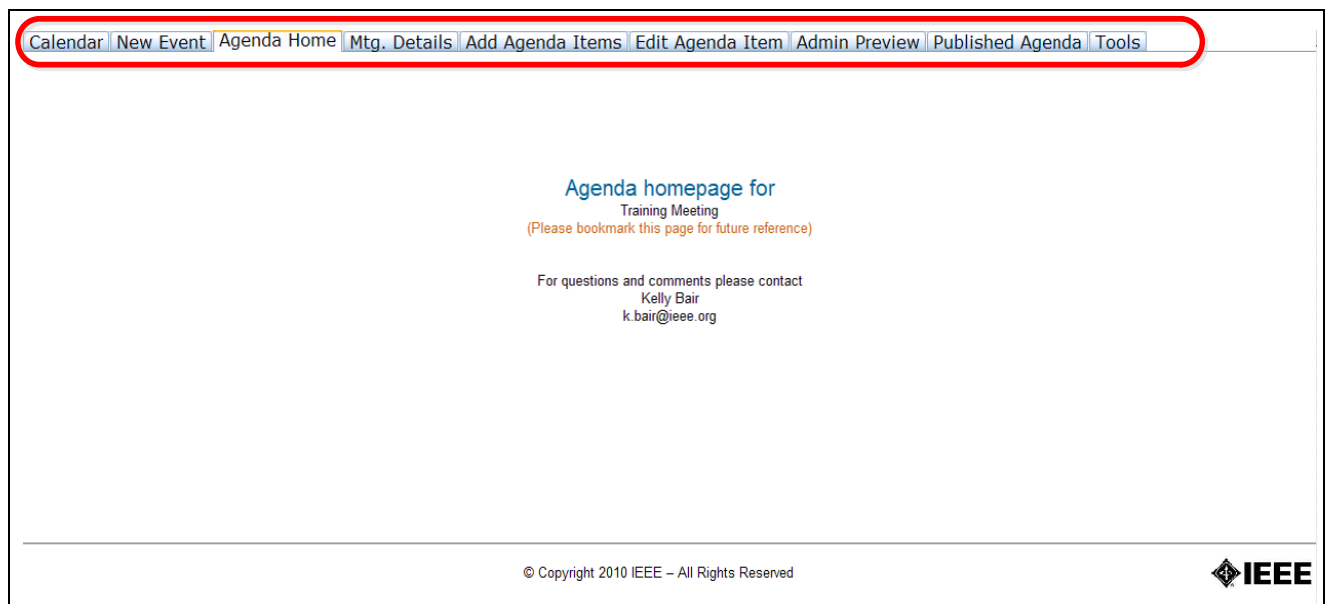
**Contributors:** Contributors are people who you allow to view the administrative version of the agenda, make edits, updates and upload attachments to the agenda. Contributors must have an ieee.org email address. List all contributors by email address only, separating each entry with a comma. Example: [j.doe@ieee.org](mailto:j.doe@ieee.org), [e.sample@ieee.org](mailto:e.sample@ieee.org), etc.

**Custom Agenda Header:** Use this field to add additional information to the Agenda Header. This does not replace the standard text in the Agenda Header, meeting name, date, start and end times. This field is commonly used if the meeting spans non-sequential days.

When finished, click 'Submit'. A confirmation screen will display. Click 'Event Agenda Homepage' to continue.



This brings you to the Agenda Homepage:



To view your newly created meeting in the calendar, click on the Calendar tab and search for the meeting as previously described.

## 2.1 Making Edits to Event (Meeting) Details

There are two ways to make edits to event (meeting) details

- 1) To make an edit to an event (meeting), go to the IEEE Calendar – List of Events, and navigate to your event. When you locate your event click on ‘Edit Event’:



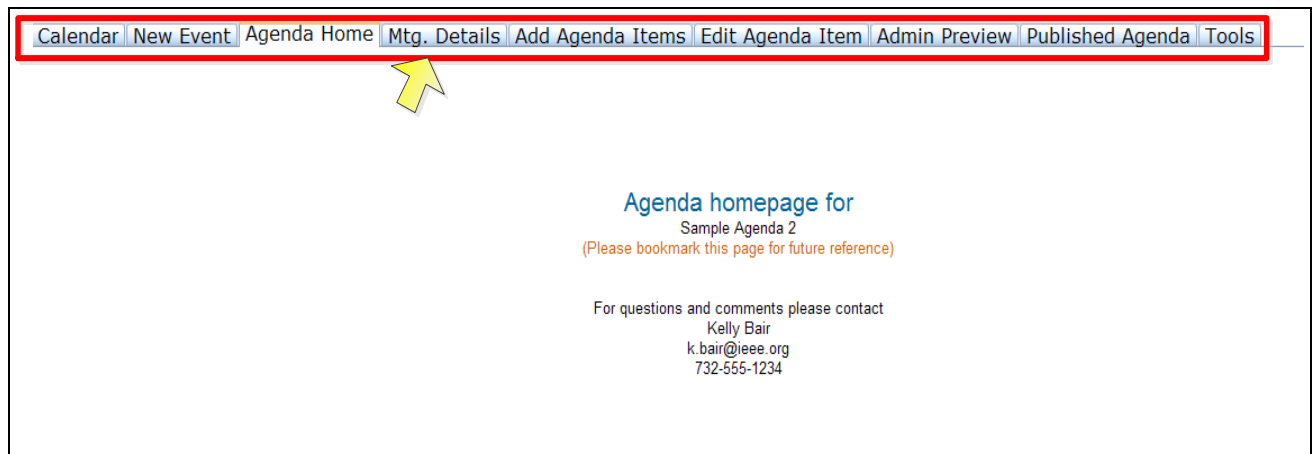
Calendar [New Event](#)

IEEE Calendar - List of Events

Filter by Business Unit :

Start Date	Business Unit	Meeting Name	
12/8/2012	Technical Activities	EDS AdCom Meeting in conjunction with IEDM	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
12/5/2012	Technical Activities	 ComSoc Board of Governors2 2012	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/15/2012	Technical Activities	Board of Directors, IEEE EMC Society	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>

- 2) Go to the Event Agenda Homepage and click on the Mtg. Details tab.



[Calendar](#) [New Event](#) [Agenda Home](#) [Mtg. Details](#) [Add Agenda Items](#) [Edit Agenda Item](#) [Admin Preview](#) [Published Agenda](#) [Tools](#)

Agenda homepage for  
Sample Agenda 2  
(Please bookmark this page for future reference)

For questions and comments please contact  
Kelly Bair  
k.bair@ieee.org  
732-555-1234

Either way, the user is taken to the Meeting Details (Mtg. Details) page where updates may be made to the event's (meeting's) basic details.

All Users (* - Required Feilds)	
* Title / Name	Sample Meeting Agenda for Training
* Business Unit	Technical Activities
* Meeting Type	Board Meeting
* Meeting Group	Technical Activities Board
* Start Date	19-Jan-2012 <a href="#">List of Holidays</a>
* End Date	19-Jan-2012
* Contact Name	Kelly Bair
* Contact Email	k.bair@ieee.org
Contact Phone	732-555-5555
Venue	
State /Province	
City	
Country	
Venue URL	
<input type="checkbox"/> This event should NOT appear in the IEEE calendar	

Agenda tool users only	
Start Time	0800 (24hr date format e.g. 0830)
Duration	8:00am -4:00pm (e.g. 9am - 5pm)
Agenda Policy	Agenda is public
Attachments Policy	All Staff and Members
Contributors	(Comma Seperated list of email address of individuals who can contributed agenda items)
Custom Agenda Header	Sample Meeting Agenda for Training


(Please enter "Toot" if you plan on using the agenda tool, or provide an alternate URL to your events agenda. you do not want your agenda linked to the IEEE calendar.

Agenda Home  
Submit

Once updated, click 'Submit', or if no changes are needed, click 'Agenda Home'.

Agenda tool users only	
Start Time	0800 (2
Agenda Policy	Agenda is public
Attachments Policy	All Staff and Members
Contributors	(Comma Seperated list of email address contributed agenda items)
Custom Agenda Header	Sample Meeting Agenda for 1

Agenda Home  
Submit



Calendar | New Event

## IEEE Calendar - Event Submission Confirmation

The event has been added / edited.

[Event Agenda Homepage](#)

## 2.2 Searching For an Existing Event (Meeting)

Calendar | New Event

## IEEE Calendar - List of Events

Filter by Business Unit : Please Select

Filter Business Unit with Drop Down Box

Start Date	Business Unit	Meeting Name		
12/8/2012	Technical Activities	EDS AdCom Meeting in conjunction with IEDM	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
12/5/2012	Publications Products and Services	ComSoc Board of Governors2 2012	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/13/2012	Educational Activities	Board of Directors, IEEE EMC Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/13/2012	Corporate Activities	IEEE Computer Society Board of Governors	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/12/2012	IEEE Foundation	IEEE Computer Society Board of Governors Caucus	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/12/2012	Business Administration	IEEE Computer Society Executive Committee	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/12/2012	Sales and Marketing	IEEE Nuclear Plasma Sciences Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
11/3/2012	IEEE USA Standards	IEEE Robotics and Automation Society Ad Com	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/13/2012	Staff	2012 IAS Q3 ExecBoard Meeting	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/7/2012	Technical Activities	IEEE Signal Processing Society Board of Governors Meeting	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
10/4/2012	Technical Activities	IEEE Photonics Society AdCom/BoG	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
9/23/2012	Technical Activities	ComSoc OpCom2 2012	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
9/21/2012	Technical Activities	Engineering in Medicine and Biology Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
8/25/2012	Technical Activities	Board of Directors, IEEE EMC Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
8/5/2012	Technical Activities	IEEE Nuclear Plasma Sciences Society	<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>
7/7/2012	Technical Activities		<a href="#">Edit Event</a>	<a href="#">Agenda Home</a>

Search by Date and /or Meeting Name



1 2 3 4 5 6 7

Click to advance through Pages

Once logged in the user will be directed to the IEEE Calendar- List of Events page. Search for existing meetings by 1) Date and Meeting Name or 2) By Business Unit to narrow the search more. Navigate through by clicking the pages at the bottom of the screen. Meetings are listed from the furthest date out to the oldest.



Once the event has been located, there are three options; 1) Click on the paperclip icon next to the Meeting Name to view the current agenda, 2) Select 'Edit Event' on the far side of the event line or 3) Select 'Agenda Home' on the far side of the agenda line. Clicking on the paperclip will send you to the meeting agenda. 'Edit Event' will allow the user to make changes to the meeting details (Title, Date, Time etc.) 'Agenda Home' will go to the Agenda Homepage which is the starting point for creating an agenda.

Calendar		New Event	
IEEE Calendar - List of Events			
Filter by Business Unit : <input type="text" value="Please Select"/>			
Start Date	Business Unit	Meeting Name	
12/8/2012	Technical Activities	EDS AdCom Meeting in conjunction with IEDM	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
12/5/2012	Technical Activities	 ComSoc Board of Governors2 2012	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/15/2012	Technical Activities	Board of Directors, IEEE EMC Society	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/13/2012	Technical Activities	IEEE Computer Society Board of Governors	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/12/2012	Technical Activities	IEEE Computer Society Executive Committee	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/12/2012	Technical Activities	IEEE Computer Society Board of Governors Caucus	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/10/2012	Member and Geographic Activities	MGA Board Meeting (10 November 2012)	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/9/2012	IEEE USA	 IEEE-USA Board of Directors Meeting	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/8/2012	Technical Activities	IEEE Conferences Committee	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
11/3/2012	Technical Activities	IEEE Nuclear Plasma Sciences Society	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
10/13/2012	Technical Activities	IEEE Robotics and Automation Society Ad Com	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
10/7/2012	Technical Activities	2012 IAS Q3 ExecBoard Meeting	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
10/4/2012	Technical Activities	IEEE Signal Processing Society Board of Governors Meeting	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
10/1/2012	Technical Activities	Consumer Electronics Society AdCom Meeting Face-to-Face Meeting	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>
9/23/2012	Technical Activities	IEEE Photonics Society AdCom/BoG	<a href="#">Edit Event</a> <a href="#">Agenda Home</a>