User Manual
AgreeDo Plugin for Outlook

© 2020 by Siehec GmbH
Last update: 5/27/2020
Version 1.0.0.36

Installation

Create an AgreeDo Meeting in Outlook

Deleting an appointment from outlook

Receiving an invitation from AgreeDo

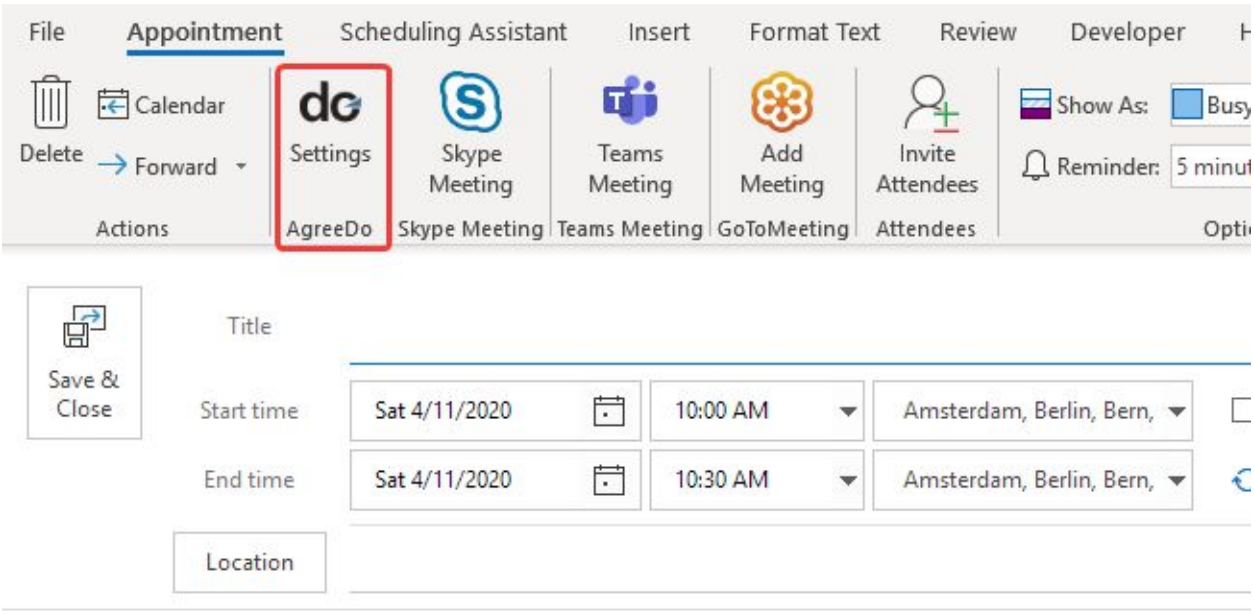
Known Issues

Installation

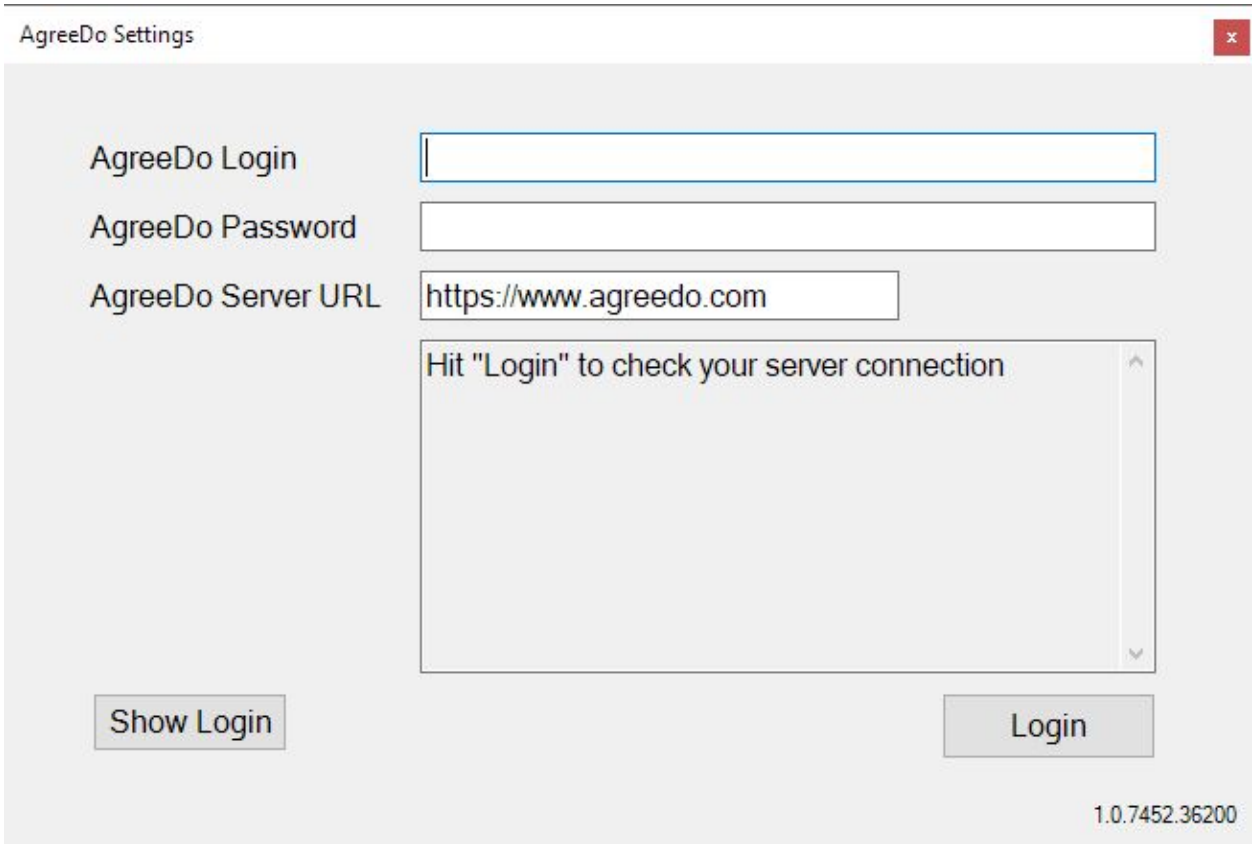
1. Close Outlook. Make sure Outlook is not running during installation
2. Optional: Uninstall any previous version of AgreeDo for Outlook first.
3. Run the setup
4. After the setup completed successfully start Outlook again

For Outlook 2016 Users:

5. Create a new Appointment in your calendar. The ribbon shows the following two buttons:



6. Click on “Settings”. This will show you the settings dialog as follows:



7. Enter your AgreeDo account login under “AgreeDo Login”. This is your email address with which you login to AgreeDo.

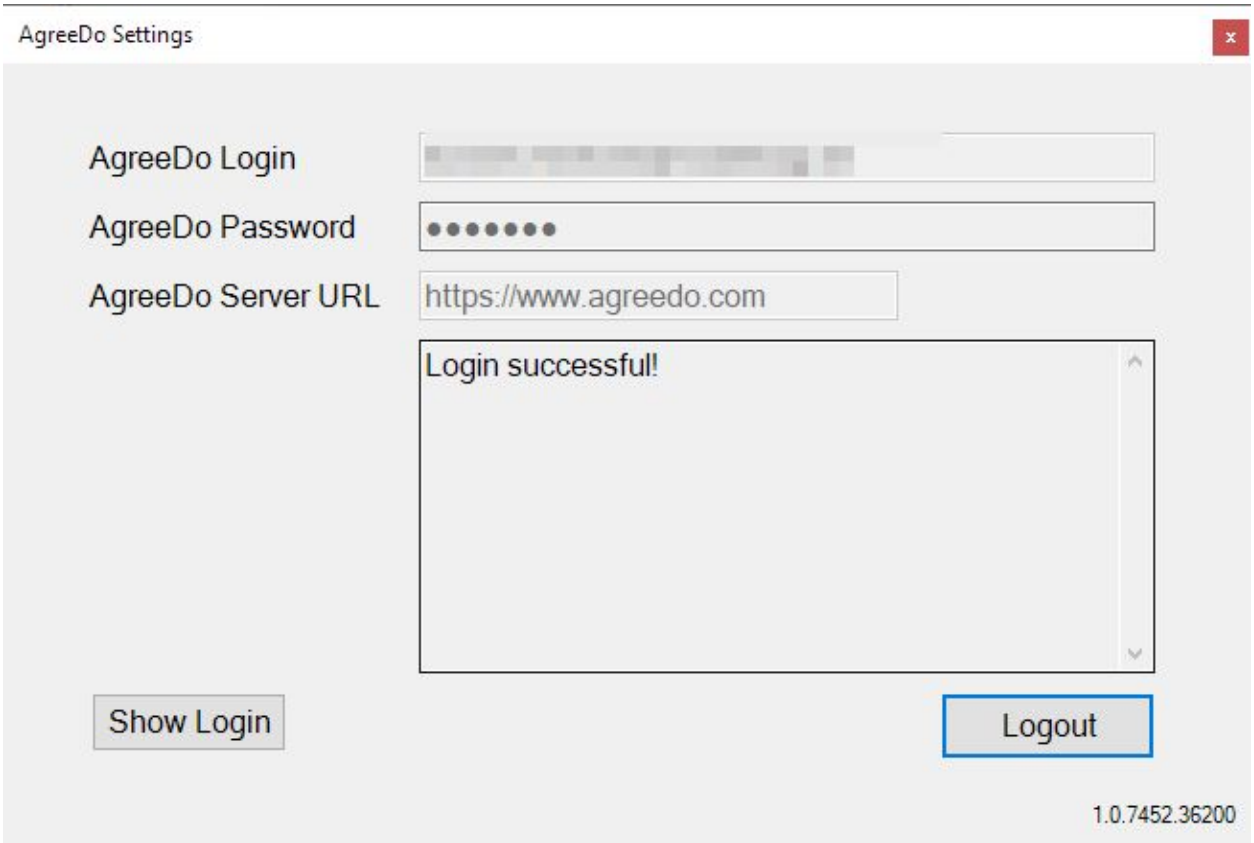
8. Enter your AgreeDo password into the “AgreeDo Password” field.

Unless you use a locally hosted AgreeDo server leave the AgreeDo Server URL unchanged

Please note: Currently the AgreeDo Plugin for Outlook does not support Google Login

Please note: In case you run your own local AgreeDo server, make sure to use only compatible versions of AgreeDo Plugin for Outlook. In case you are not sure please request help from support@agreedo.com. **If you use incompatible version you may lose date!**

9. Hit the Login button. In case the server accepted your user credentials the dialog changes to:

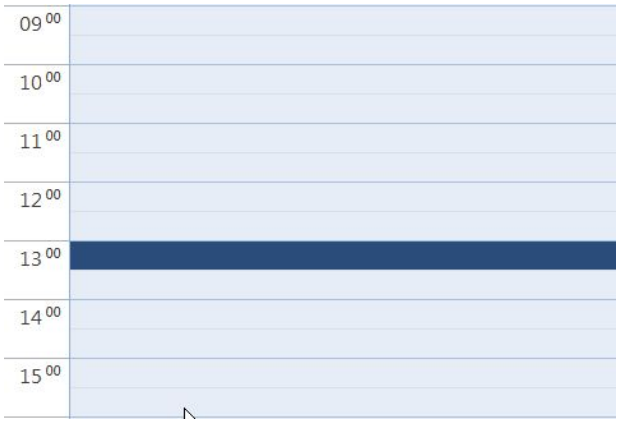


10. Now hit the “OK” button. Also “Login successful” will be displayed. In case you received and error message, make sure to recheck your login / password and the correct url which reads: https://www.agreedo.com. Try your login and password for a login using a web browser to make sure your entered the correct values. As long you are able to login using a web browser at https://www.agreedo.com you should also be able to login with the AgreeDo Plugin for Outlook.

11. Hit “OK” button to close the settings dialog. You are now ready to use AgreeDo from within Outlook.

Create an AgreeDo Meeting in Outlook

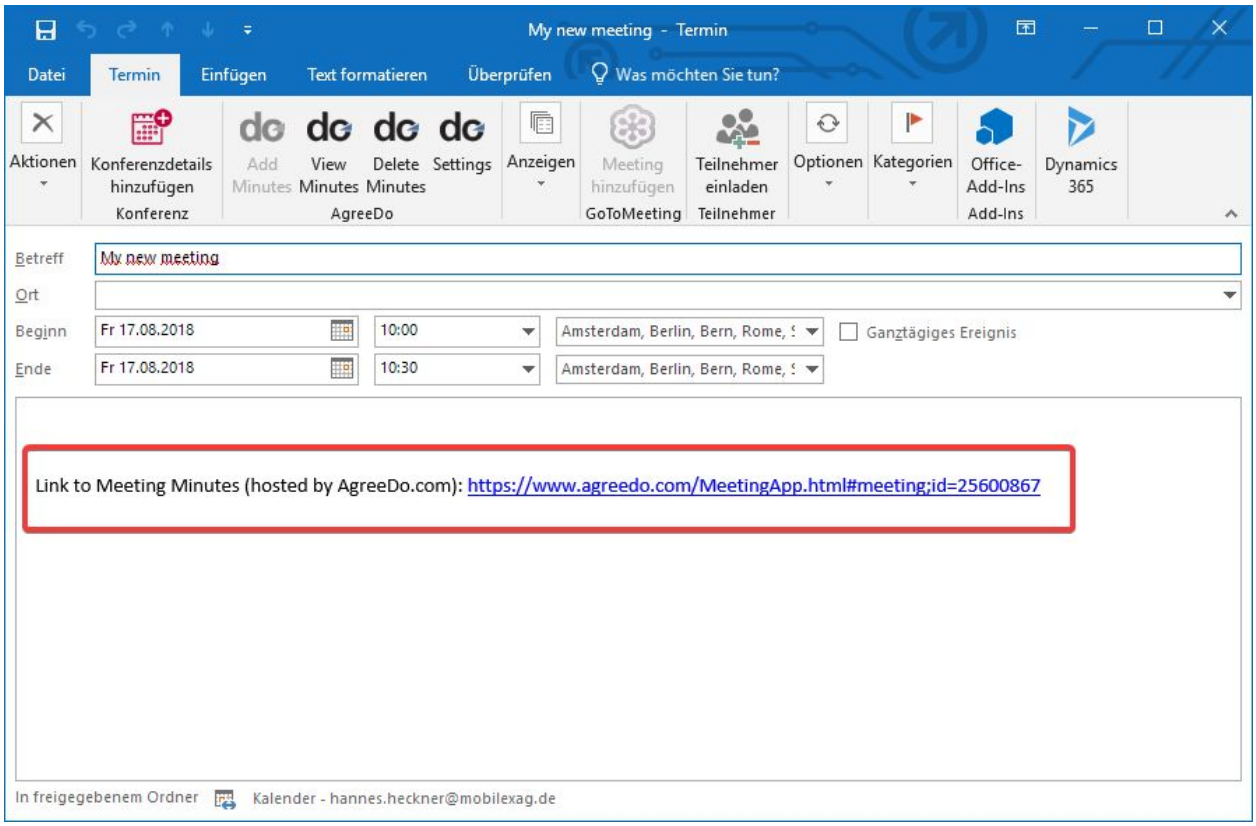
To create an AgreeDo meeting in outlook just open your calendar and add another appointment:



When opening the appointment dialog in Outlook you should see the AgreeDo buttons in the ribbon above as follows:

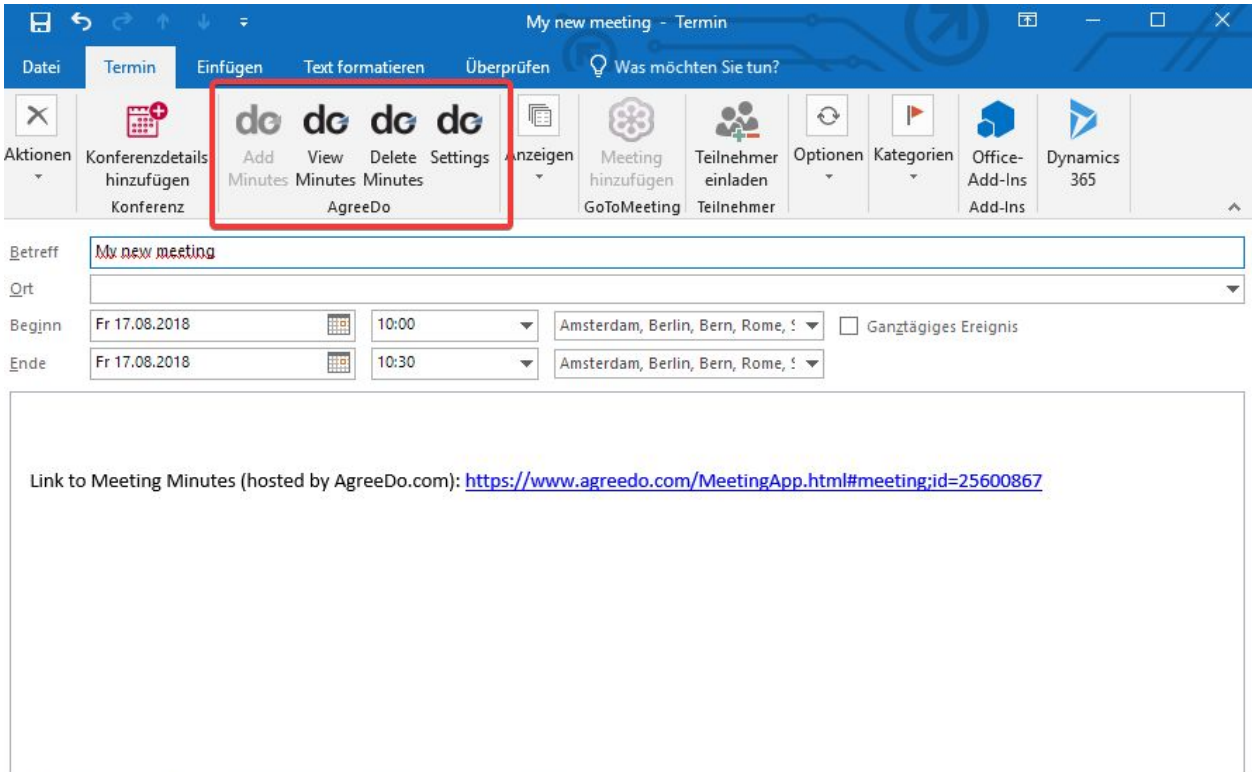
Hit the “Add Minutes” button to add an AgreeDo meeting to this appointment. After hitting the button your default web browser will open with the newly created meeting.
By default the AgreeDo Plugin for Outlook uses the title of the appointment as the title for the AgreeDo meeting and the appointment’s participants as the participants for the AgreeDo meeting.
You can now write your meeting minutes in AgreeDo.

The AgreeDo Plugin for Outlook adds a link to the AgreeDo meeting to the body of the appointment.



Every invitee will have access to the agenda by clicking on the link (as long as he is an authorized user, or course). For more on access privileges find our blog post about this topic at: https://www.agreedo.com/blog/2018/02/access-rights-for-meeting-minutes/

When the AgreeDo Plugin for Outlook is installed each appointment which has a link to an AgreeDo meeting will show this Ribbon:

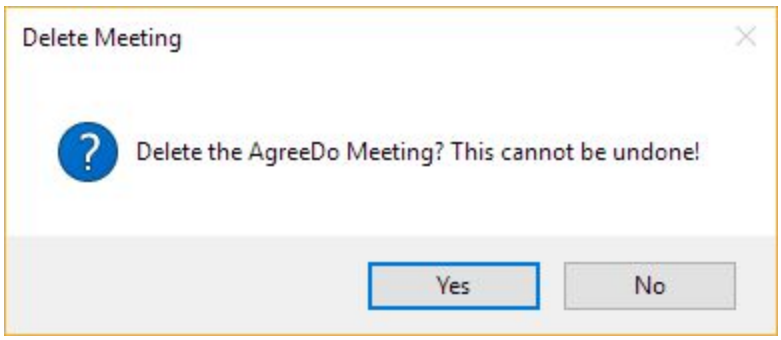


So you may also

- View the AgreeDo meeting or
- Delete the AgreeDo meeting minutes

Deleting an appointment from outlook

If you delete an appointment from outlook which has an attached AgreeDo agenda, outlook will also ask you whether to delete the agenda, too:



Hit “Yes” to delete the AgreeDo meeting. Please note, this cannot be undone.

Receiving an invitation from AgreeDo

If someone sends you an invitation using www.agreedo.com the AgreeDo Plugin for Outlook plugin will also show a button to view the agenda directly from outlook

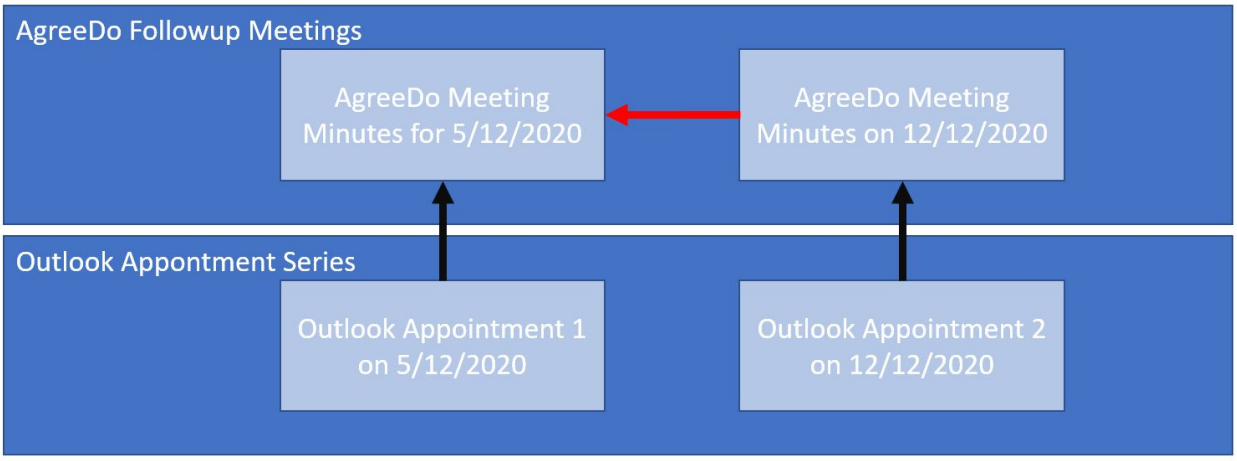
Just click on the “View Minutes” from the ribbon menu. This will open your default browser to view the meeting minutes.

Recurring Meetings

AgreeDo Plugin for Outlook also supports recurring meetings. Please note the following usage:

If you create a meeting series you cannot attach an AgreeDo meeting to the master of the series. Meeting minutes can only be recorded for a single meeting not for a series.

If you use AgreeDo on the next appointment in a series AgreeDo automatically searches for the most recent appointment in the series. If it finds one it will create the new meeting minute as a follow up this meeting.
Example



If you create add an AgreeDo meeting to Appointment 2 in Outlook, it will look for previous Outlook appointment. It”l find the meeting on 5/12. If this appointment links to an AgreeDo meeting it”ll be linked to the newly create AgreeDo meeting (red arrow above).

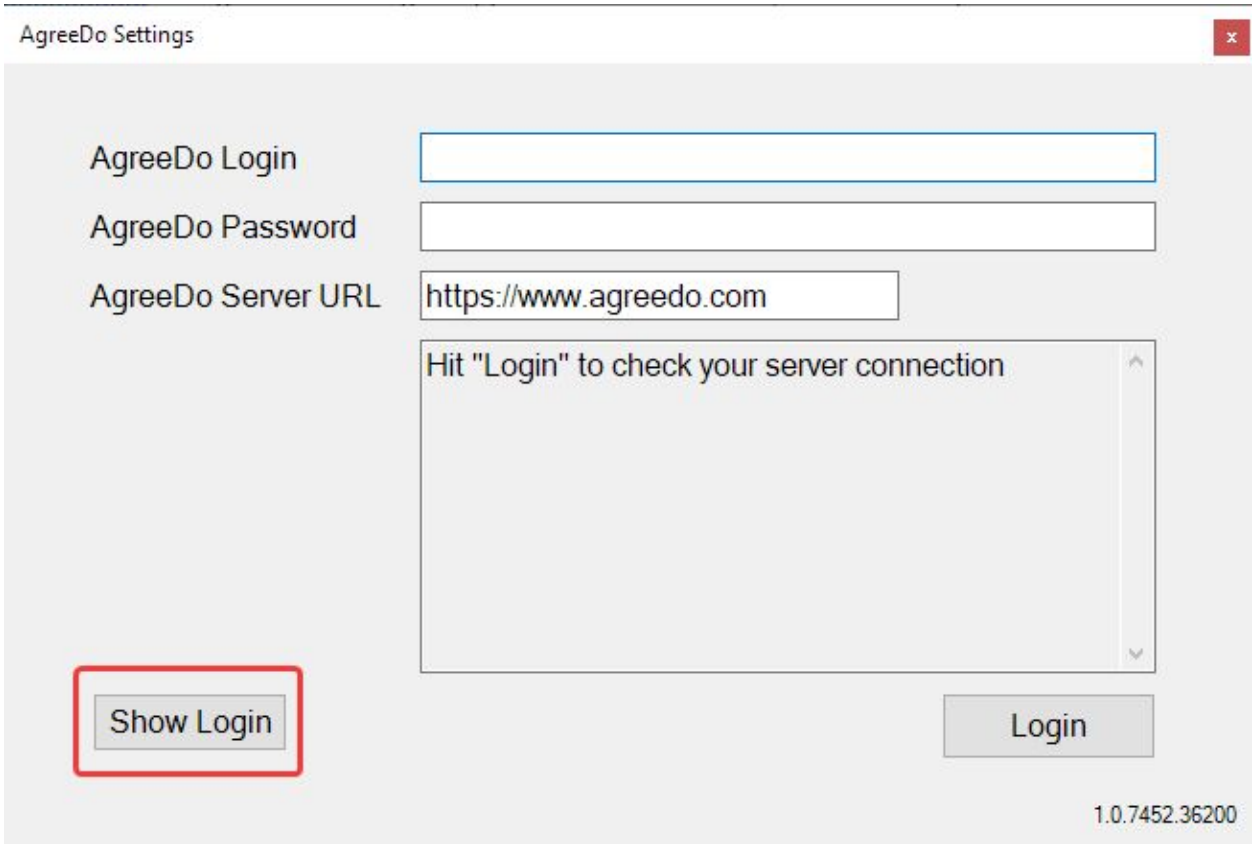
Manual linking an Outlook Appointment to an AgreeDo meeting

In some cases it can be useful to manually link an Outlook Appointment to an AgreeDo meeting. How can you do that.
Step 1: Open you AgreeDo meeting in your favorite browser
Step 2: Copy the URL of this meeting. It:”ll look something like
https://www.agreedo.com/MeetingApp.html#meeting;id=31710621
Step 3: Open the details of your Outlook Appointment and copy the URL to the body of your Appointment
Step 4: Save and Close the Appointment

Troubleshooting

If you experience any serious trouble please contact support@agreedo.com and attach the logfile along with a complete problem description (step by step description of how to reproduce the problem). You can copy and paste the logfile from the settings dialog:

Step 1: Click Show Logfile



Notepad will open with the logfile
Step 2: Copy and paste all contents from the notepad to the email.

Step 3: Send you email to support@agreedo.com.

Known Issues

- Currently only 2 languages (DE / EN) are supported in AgreeDo Plugin for Outlook user interface.
- Currently the AgreeDo Plugin for Outlook does not support Google Login.