Meetings

This page contains information about the "Meetings" module in the ACC Build tool.

Creating Meetings

The **Meetings** module allows you to schedule, manage, and track meetings efficiently. Follow these steps to create and manage a meeting.

Step 1: Create a Meeting

1. Click **Create Meeting**.
2. Fill in the meeting details:
   - **Title**
   - **Date & Time**
   - **Location** (click the **pencil icon** to edit)
3. Prepare your agenda and invite attendees.

Tip: You can also create meetings using **preset templates**.
See: *Create Meetings from Template*.

Note: Even if you don’t add a title or details, the meeting will appear in the **Meeting Series List**. Click the title to open and edit.

Step 2: Add Meeting Details

- After creating the meeting, you can edit details anytime.
- By default, the meeting starts in **Agenda** mode.
  You can switch to **Minutes** after the meeting ends to lock it.
  See: *During Meetings* for more info.

Step 3: Add a Video Conference Link

1. Click **Add Link**.

2. Choose **Microsoft Teams** or **Zoom**.
    - For **Teams**: Edit the generated link using the **pencil icon**.
    - For **Zoom**: Sign in and authorize Autodesk Construction Cloud on first use.

Important Notes:

- Meeting times may differ in Zoom—refer to the time shown in the Meetings tool.
- Adding a video link does **not** create a calendar entry in Teams or Zoom.
  See: *Video Conference Links* for details.

Step 4: Invite People

1. Click the **Invitees icon**.
2. Click **Add Invitees**:
    - Select project members.
    - Or create a **nonmember** (add name, company, email).
3. Click **Confirm**.

Roles & Permissions:

- Assign **Organizer** role via the **More menu** next to the invitee’s name.
- Remove invitees if needed.
  See: *Meetings Permissions* for role details.

Step 5: Share the Agenda

Inviting people does **not** send an email automatically. To share:

1. Click the **More menu**.
2. Select **Share with invitees**.
3. Choose:
    - **Email with meeting link**
    - **Link to agenda in Autodesk Build**
4. Click **Share** to finish.

Step 6: Add Meeting to Your Calendar

- Click the **More menu** and select **Add to calendar (.ics)**.

Step 7: Manage Meeting Discussion

- Discussions are organized into **Topics** and **Items**.
- Example: Topic = *Safety*, Items = *Equipment availability issues*.

To add items:

1. Create a topic first.
2. Click **Add Item** for each item.
    - Press **Enter** to add a line within the same item.
    - Click **Add Item** again for a new item.

Item Management:

- Each item starts with **Open** status (can be changed).
- Use **More menu** to:
    - Add due dates
    - Assign people
    - Add references
- Delete items or topics using the **Trash icon**.

Step 8: Add References

- Click **References** to view/manage meeting references.
- **Meeting-level references:** Documents or sheets relevant to the entire meeting.
- **Item-level references:** Attach files, sheets, RFIs, issues, photos, submittals, assets, forms, schedule items, plan tasks, or cost items via the **More menu**.

What’s Next?

- After the meeting, switch from **Agenda** to **Minutes** to lock the meeting.
- Track action items and follow up using the Meetings module.

During Meetings

During a Meeting in Autodesk Construction Cloud

As your meeting begins, go to the **Meetings tab** in the **Meeting tool**. From the **Meeting Series List**, open the meeting you want to manage. You can track attendance, take notes, and export meeting minutes in PDF format at the end.

Step 1: Record Attendance

- As invitees join, toggle the **checkboxes** next to their names in the **Invitees list**.

Step 2: Take Notes

You can add notes to any meeting item during the meeting:

- Click the item and press **Enter** to insert a line break.

Within **Meeting Discussion**, you can:

- **Change status or flag items for follow-up meetings**
  Use the **status drop-down** to close items during the meeting. Closed items won't appear in follow-up meetings.
- **Delete items and topics**
  Hover over the topic or item and click the **Trash icon**.
- **Create topics and items**
  Click **+ Add Topic** or **+ Add Item**.

- **Assign follow-up work, due dates, attachments, or references**
  Hover over the item and click the **Hamburger menu icon**.
- **Reorder topics or items**
  Hover over the topic or item, click the **Handle icon**, and drag to reorder.
  Tip: Items can be moved between topics. Numbering updates automatically.

Meeting Summary:
You can also write in the **Meeting Summary** section.

- Summary content does **not** carry over to follow-up meetings.
- Follow-up meetings copy the current meeting description, non-closed agenda items, invitees, and location.

Step 3: Filter Items

To focus on specific items during the meeting, use **filter options** to view only relevant action items.
See: *Filter Items During a Meeting* for detailed instructions.

Step 4: Mark as Minutes

Once notes are complete:

1. Open the **drop-down list** in the top-left corner.
2. Select **Minutes**.
   - Notes become **read-only**.
   - Organizers and administrators can still reopen and edit if needed.

Tip: Inform attendees they can export a PDF of the meeting minutes.
See: *Export Meeting Information* for details.

What’s Next

After completing your meeting:

- Mark the meeting as **Minutes** to finalize the record.
- Create **follow-up meetings** for ongoing discussions.

- Export meeting information to share with stakeholders.
- Manage meeting records as needed.

Parent Page: *Working with Meetings*