



Information classification: Internal

**MEETINGSUITE BY BRAINLOOP FOR IOS APP**

# User Guide

# Contents

1	Overview .....	4
1.1	Key features .....	4
1.2	Screen orientation.....	5
1.3	Navigation .....	5
1.4	Profile & Settings .....	5
1.5	Frequently asked questions (FAQs).....	6
2	Get started .....	8
2.1	Download and install the app from the Apple App Store.....	8
2.2	Activate the device's screen lock .....	8
2.3	Create an access code for the app.....	8
2.4	Add and select a server .....	9
3	How to ... ..	11
3.1	Work with Brainloop MeetingSuite accounts.....	11
3.1.1	Sign in into your account.....	11
3.1.2	Sign out of your account .....	11
3.2	Work with Flows (meetings and circular resolutions).....	12
3.2.1	View meetings and meeting details .....	12
3.2.2	View resolutions and resolution details.....	13
3.3	Work with documents.....	14
3.3.1	Add annotations and markups to documents .....	14
3.3.2	View and delete annotations and markups .....	18
3.3.3	Change the outline of documents .....	18
3.4	Work with votes in a Flow .....	19
3.4.1	Cast your vote .....	19
3.4.2	Change your vote.....	20
3.4.3	View vote results .....	20
3.5	Work with actions .....	21

3.5.1	View tasks and task details .....	21
3.5.2	View subtasks and subtask details .....	22
3.5.3	View polls and poll details.....	22
3.5.4	Cast your vote in a poll.....	23
3.5.5	Change your vote in a poll .....	23
3.5.6	View poll results .....	24
3.6	Work with Files .....	24
3.6.1	View files from your data rooms.....	24
3.6.2	View shared folders .....	25
3.6.3	Share files .....	26
3.7	Search for items .....	26
3.8	Manage settings and account details.....	27
3.8.1	Change organization .....	27
3.8.2	Settings.....	27
3.8.3	Help .....	29
3.8.4	Legal Notice, Privacy Notice, Terms of Use .....	29
3.8.5	Lock the app and sign out .....	29

# 1 Overview

The iOS app MeetingSuite by Brainloop allows you to access your meetings, resolutions, and votes (Flows), your actions (Action Center), your personal data room (MyRoom), and your team data rooms (TeamRoom).

This guide covers the functionalities of the iOS app MeetingSuite by Brainloop.

- > For information about the data room functionalities (MyRoom and TeamRoom) of MeetingSuite, please refer to the MyRoom and TeamRoom User Guide or the MyRoom and TeamRoom Admin Guide, as appropriate for your role (see "How can we help?" at [https://help.brainloop.com/ix/help/en\\_us](https://help.brainloop.com/ix/help/en_us)).
- > For information about the Flow functionalities of MeetingSuite, please refer to the MeetingSuite Flows User Guide or the MeetingSuite Flows Admin Guide, as appropriate for your role (see "How can we help?" at [https://help.brainloop.com/ix/help/en\\_us/](https://help.brainloop.com/ix/help/en_us/)).
- > For information about the Action Center functionalities of MeetingSuite, please refer to the MyRoom and TeamRoom User Guide (see "How can we help?" at [https://help.brainloop.com/ix/help/en\\_us/](https://help.brainloop.com/ix/help/en_us/)).

## 1.1 KEY FEATURES

The MeetingSuite by Brainloop app allows you to access your Flows and actions as well as your personal data rooms and team data rooms from your iOS device.

The key features of the app are:

- > Detailed overview of all your meetings on the **Meetings** page and circular resolutions on the **Resolutions** page.
  - View all your meetings and circular resolutions, participate in your votes and circular resolutions, and view the vote results.
- > Detailed overview of all your Action Center content via the **Actions** button on the **Tasks** and **Polls** pages.
  - View all your tasks and polls, add comments, cast your vote, and view the poll results.

**Note:** The button is only shown if the Action Center is activated for your organization.
- > Access your personal data room (MyRoom) and your team data rooms (TeamRoom) to view and download your files on the **Files** page.
  - Add your private annotations and markups to your documents.
- > Search for meetings, votes, and meeting documents on the **Search** page.

## 1.2 SCREEN ORIENTATION

Depending on your iOS device and its screen orientation, buttons and information can be displayed differently. This guide describes the usage of MeetingSuite by Brainloop from a vertical point of view.

## 1.3 NAVIGATION

By default, navigation in the MeetingSuite by Brainloop app starts on the **Meetings** page. The bottom navigation bar allows you to switch between the main functionalities of MeetingSuite by Brainloop:

- > **Meetings:** You can choose between viewing your upcoming or finished meetings and access their details.
- > **Resolutions:** You can choose between viewing your upcoming or finished circular resolutions, access their details and votes.
- > **Actions:** You can choose between viewing your tasks or polls and access their details.
- > **Files:** You have access to all files in your personal data room and all files in your team rooms.
- > **Search:** Allows you to search for documents, folders, and Flows.

**Note:** Archived Meetings and Resolutions are not displayed in the list for finished Meetings and Resolutions.

## 1.4 PROFILE & SETTINGS

You can access your profile by tapping on your profile picture (your initials by default) from any page.

The **Profile** page contains the following options:

- > **Change organization:** Allows you to switch to a different organization.
- > **Settings:** Allows you to view your personal information, select your preferred language, enable and disable biometric authentication, set a time frame limit for the automatic lock, change your access code or switch to a more complex and secure access code.
- > **Help:** The **Help** option directs you to the ["How can we help?"](#) page which gives access to the user guides for Brainloop MeetingSuite.
- > **Legal notice, Privacy notice, and Terms of use**
- > **Lock app and Sign out**

## 1.5 FREQUENTLY ASKED QUESTIONS (FAQS)

### Which operating systems are supported?

- > iOS 18 or newer

### Where and how can I get the app?

- > Go to the Apple App Store and search for "MeetingSuite by Brainloop". You need a compatible iOS device and an Apple ID.

### Is it possible to solely use the app or do I have to be active in a data room?

- > You must be a member of an organization. To be able to see team rooms, meetings, circular resolutions, and actions you also have to be invited accordingly or be a participant.

### Where do I find contact data for Brainloop?

- > On the **Profile** page (accessible via your initials or profile picture), select **Help**, scroll down to **Service** section at the bottom and select [Contact Support](#) for the phone numbers and email address of Brainloop Support.


### Where do I find the online help?

- > On the **Profile** page, select **Help** and navigate to the respective topic.

Direct links:

- [User Guide for MyRoom and TeamRoom](#)
- [Admin Guide for MyRoom and TeamRoom](#)
- [User Guide for MeetingSuite Flows](#)
- [Admin Guide for MeetingSuite Flows](#)

### Why are my annotations no longer visible after I've added them?

- > If you can't find your annotations in the open document after you have added them, you can find them in the annotations list. To open the list, select the annotations pane icon  within the document, switch from **Outline** to **Annotations** at the top of the annotations pane, and select the item to view it on the corresponding page of the document.

- > Another reason you might not be able to find your annotations can be that a new document version was published in the meantime. Currently, you can access older versions of documents only from the web version of Brainloop MeetingSuite. To view your annotations in older document versions in the web version, select **⋮** next to the item, select **Properties > Versions**, and then select **Edit annotations** next to the required document version to view and edit your annotations.

## 2 Get started

### These are the main steps to get started:

1. Download and install the MeetingSuite by Brainloop app from the Apple App Store.
2. Activate the screen lock of your device (recommended).
3. Create an access code.
4. Add and select a server.

**Note:** A precondition for using the iOS app MeetingSuite by Brainloop is to be a registered MeetingSuite user. The invitation to your data room is generally sent to you by email. The email includes an explanation of the registration process and a link to the registration page of Brainloop MeetingSuite. Use this email address, i.e. your username, to sign in into your data rooms.

### 2.1 DOWNLOAD AND INSTALL THE APP FROM THE APPLE APP STORE

The MeetingSuite by Brainloop app can be downloaded and installed free of charge from the Apple App Store. Type "MeetingSuite by Brainloop" into the search field to search for this app and install it according to the instructions displayed on the screen.

### 2.2 ACTIVATE THE DEVICE'S SCREEN LOCK

To increase the protection level of your data, we recommend activating the screen lock on your device. This adds another layer of security on your device and also protects documents from other apps. We recommend that you use a complex, alphanumeric password. For instructions on how to set a screen lock, please refer to the documentation for your device. **Note:** To be able to use biometric authentication, the device's screen lock has to be turned on.

### 2.3 CREATE AN ACCESS CODE FOR THE APP

When you open the MeetingSuite by Brainloop app for the first time, you first have to create an access code for the app. By default, the simple access code is configured, which requires 6 digits. It's possible to change to a more

complex access code or to biometric authentication on the **Profile** page after you have signed in into an organization.

- > Enter an access code of your choice and confirm the access code by entering it a second time.
- > Enter the access code a third time to actually access the app.
- > If you have forgotten your access code, select the **Forgot your access code?** link and follow the instructions to create a new access code.

## 2.4 ADD AND SELECT A SERVER

In the MeetingSuite by Brainloop app, you can either select the default server (<https://services.brainloop.net> or <https://services.brainloop.net>) or add a different data room server, such as your own company's server or your country-specific server. If you are using the default server, you can skip the following step.

### To add a different server:

1. Open the MeetingSuite by Brainloop app.
2. Type in your access code or use biometric authentication.
3. On the **Server selection** page, select **Custom data room server**.
4. On the **Company's data room server** page, enter a name and the correct server URL. You can also add a description of your server.
5. Select **Submit**.

### To select a server:

1. Open the **MeetingSuite by Brainloop** app.
2. Type in your access code or use biometric authentication.
3. On the **Server selection** page, select the default server or your added server.
4. The app will show a prompt for you to confirm the server address for signing in.
5. Enter your **Email address** for the account that you want to use and select **Next**.
6. Enter your **Password**, and select **Sign in**.
7. If your account requires secondary authentication, enter the PIN that has been sent to your mobile phone or email address and select **Submit**.
8. Select **OK** to confirm that you want to connect to your account.
9. If there are several organizations for your account, select the desired organization.

**Note:** To delete a server connection, tap and hold an existing connection, swipe to the left, and select the trash can icon.

## 3 How to ...

### 3.1 WORK WITH BRAINLOOP MEETINGSUITE ACCOUNTS

#### 3.1.1 SIGN IN INTO YOUR ACCOUNT

1. Open the MeetingSuite by Brainloop app.
2. Type in your access code or use biometric authentication.
3. On the **Server selection** page, select the default server or an added server.
4. The app will show a prompt for you to confirm the server address for signing in.
5. Enter your **Email address** for the account that you want to use and select **Next**.
6. Enter your **Password**, and select **Sign in**.
7. If your account requires secondary authentication, enter the PIN that has been sent to your mobile phone or email address and select Submit.
8. Select **OK** to confirm that you want to connect to your account.
9. If there are several organizations for your account, select the desired organization.

If you have several different Brainloop MeetingSuite accounts, you may need to sign out of one account via the **Profile** page to be able to access your other accounts. For instructions on how to sign out, please refer to the following section.

#### 3.1.2 SIGN OUT OF YOUR ACCOUNT

Select the **Profile** icon in the top-left corner and select **Sign out > Sign out**.

You are signed out of your account and are redirected to the page for entering your access code.

When you want to sign back into an account, enter your access code. The Server selection page is shown immediately after opening the app and you can follow the steps described in the chapter "[Sign in into your account](#)".

## 3.2 WORK WITH FLOWS (MEETINGS AND CIRCULAR RESOLUTIONS)

You can find your **Flows** on the **Meetings** page and the **Resolutions** page, respectively.

### 3.2.1 VIEW MEETINGS AND MEETING DETAILS

#### To view the Meetings list:

- > The list of your current and upcoming **Meetings** is opened by default when you sign in into an account.
- > To view meetings that have been concluded, select **Finished meetings** in the top-right corner.
- > To sort the meetings by date ("Oldest to newest" and "Newest to oldest"), select the more options icon in the top-right corner and choose a sorting order.

#### To go to the Meetings list from elsewhere in the app:

- > Select the **Meetings** icon in the bottom navigation bar to display the **Meetings** list.

#### To view details for a meeting:

1. Select the **Meetings** icon in the bottom navigation bar to display the **Meetings** list.
2. Select the desired meeting to display the meeting details.

#### The following meeting details and options are available:

- > **Name** of the meeting
- > Current **status** and **date and time** of the meeting
- > **Location** of the meeting, if available
- > **Additional information:** Up to three lines are displayed. To view the whole information text, select the **Show more** option.
- > **Invitation text:** Up to three lines are displayed. To view the whole invitation text, select the **Show more** option.
- > Total number of **Participants** of the meeting, with names and profile icons of the first four participants shown in the order of their roles. To view all participants, select the **Show all participants** option.
- > **Use offline:** Select the slider to download the meeting documents attached to this meeting to your device.
- > **General documents**
- > **Agenda items**, numbered as defined in the web interface, including start times, attached documents, and votes.  
**Note:** Select any document to open it. You can also add notes to the documents.

The details page of a meeting contains all the documents that have been attached to the meeting. Meeting documents are, for example, the meeting agenda and the documents relating to the individual agenda items.

### 3.2.2 VIEW RESOLUTIONS AND RESOLUTION DETAILS

#### To view the list of circular resolutions:

- > The list of **Resolutions** can be opened via the **Resolutions** icon in the bottom navigation bar.
- > To view resolutions that have been concluded, select the **Finished** option.
- > To switch to resolutions that are still in progress, select the **In progress** option.
- > To sort the resolutions by name (A to Z and Z to A), select the more options icon in the top-right corner and choose a sorting order.

#### To view details for a circular resolution:

1. Select the **Resolutions** page in the bottom navigation bar.  
The **Resolutions** list is displayed.
2. Select the desired circular resolution to display the meeting details.

#### The following circular resolution details and options are available:

- > **Name** of the circular resolution
  - > Current **status** of the circular resolution
  - > Voting options (**Approve, Reject, Abstain**)
  - > **Summary**
  - > **Documents**
  - > **Votes:** Who voted how.
  - > **Participants:** Names and their roles.
  - > **Vote organizer:** The person who organized the circular resolution.
- Note:** Select any document to open it. You can also add notes to the documents.

The details page of a resolution contains all the documents that have been attached to the circular resolution. Documents are, for example, the cover page and the documents relating to the individual resolution.

### 3.3 WORK WITH DOCUMENTS

Documents can be attached to meetings or resolutions, or they can be saved to your personal data room or team data room. For further information on navigating to documents, please see section "[View files from your data rooms](#)". You can also open documents you find via the search functionality.

#### To open a document:

- > Simply tap on the individual document.

#### Supported file types:

Currently, MeetingSuite by Brainloop supports the following file types:

- > Images (.gif, .jpg, .jpeg, .png)
- > Word (.doc, .docx, .docm, .dotx, .dotm)
- > Excel (.xls, .xlsx, .xlsm, .xltx, .xltm)
- > PowerPoint (.ppt, .pptx, .pps, .ppsx, .pptm, .potx, .potm)
- > Adobe Acrobat (.pdf)
- > Text file (.txt)
- > Richt text file (.rtf)

#### Other file types:

The MeetingSuite by Brainloop app does not support audio and video files (e.g. .wav, .mp3, .mp4, .avi, etc.).

However, you can download these files and play them using the corresponding iOS apps. Make sure the downloaded audio or video files are properly protected on your device.

#### 3.3.1 ADD ANNOTATIONS AND MARKUPS TO DOCUMENTS

You can add annotations and markups to documents and save them. You can add annotations and markups even if you are not connected to the internet. You can access your documents including your annotations and markups in the web version of Brainloop MeetingSuite.

**Note:** If you download originals from the web version of Brainloop MeetingSuite, the annotations and markups will not be downloaded as well.

## To add annotations or markups to a document:

1. Open the document to which you want to add your annotations or markups.
2. Tap into the document.

The tools and menu bars are displayed at the top and at the bottom.


3. Select the markup or text tool from the tool bar at the top and start working. Depending on the tool, some **Style** options for color, thickness, size, and opacity appear in the tool bar at the top or in a drawer at the bottom.

### Annotation and markup tools available:

1. Highlight
2. Freehand highlight
3. Ink
4. Draw
5. Write with keyboard
6. Note
7. Underline

**Note:** The annotation and markup tools are provided by a third-party and are subject to change.

4. The two arrows in the right corner of the toolbar at the top allow you to undo any annotations or markups.
5. Close the document via the **Close** button in the top-right corner and your annotations and markups are saved. They will be automatically synchronized if you have internet access.

**Note:** To view your annotations and markups in the annotations list, select the annotations pane icon  in the left corner of the menu bar at the bottom. Select an item to view it on the corresponding page of the document. If your annotations are no longer visible in the open document after you have added them, you can find them in this list.

## To add a note:

1. Select the sticky note icon.
2. Double tap on the position in the document where you want to place the sticky note.
3. Type your comment into the **Note** text box.

**Tip:** To delete a note again, tap on the sticky note in the document and select **Delete**.

## To highlight:

1. Select the highlight or the freehand highlight tool icon.
2. Swipe on the text or place you want to highlight.
3. To extend the highlight, tap on it so that pin icons are displayed.
4. Draw the corresponding pin icon to the desired position.

5. Tap on the highlighted area to display the available settings:
  - **Style** to select the **Color**, **Thickness**, and **Opacity** of the highlight.
    - **Color:** Select the colored circle, choose the desired color and tap into the document.
    - **Thickness:** Move the slider to select a pen thickness between 1 pt and 12 pt.
    - **Opacity:** Move the slider to select the desired opacity between 10 % and 100 %.
  - **Note** to add an additional note text.
  - **Flatten**
  - **Type** (text highlight only):
    - **Underline**
    - **Squiggly line**
    - **Strikeout**
    - **Highlight** (if you have chosen any other type)
  - **Duplicate** (freehand highlight only)
  - **Copy:** Copy the highlight to the Clipboard.
  - **Delete** to delete the highlight.

### To add freehand comments:

1. Select the ink icon.
2. Use your finger or pen to write text or draw directly into the document.
3. To change the freehand comment or drawing tap on it and choose one of the following options:
  - **Style**
    - **Color:** Select the colored circle, choose the desired color and tap into the document.
    - **Thickness:** Move the slider to select a pen thickness between 1 pt and 12 pt.
    - **Opacity:** Move the slider to select the desired opacity between 10 % and 100 %.
  - **Note** to add an additional note text.
  - **Flatten**
  - **Duplicate**
  - **Copy:** Copy the comment to the Clipboard.
  - **Delete** to delete the comment.

### To draw:

1. Select the draw icon.
2. Use your finger or pen to draw directly into the document.
3. To change the drawing tool, choose one of the options from the drawer at the bottom. The options include:


- **Fineliner**
- **Pencil**
- **Ball pen**
- **Marker**
- **Eraser**
- **Crayon**
- **Color**
- **Ruler**
- **Undo buttons**
- **Minimize** and move the drawer
- **Options** for the drawer

### **To add text using the device's keyboard:**

1. Select the text icon.
2. Tap on the desired position in the document.
3. You can change the following properties of your annotation in the tool bar at the top:
  - **Text Color:** Select the colored circle, choose the desired color, and tap into the document.
  - **Border Color:** If you want a frame around your text, select the colored circle and choose the color.
  - **Fill Color** of the text box
  - **Font:** Select the font name, choose a different font, and tap the **< Text** option in the top-left corner of the menu.
  - **Horizontal Alignment** of the text in the box
  - **Vertical Alignment** of the text in the box
  - **Thickness:** Move the slider to select a pen thickness between 1 pt and 12 pt.
  - **Text Size:** Move the slider to select a size between 4 pt and 72 pt.
  - **Opacity:** Move the slider to select the desired opacity between 10 % and 100 %.
4. Type your text using the iOS keyboard and close the keyboard when you are finished using the **Close** button in the top-right corner of the keyboard.
5. To change the text, tap on it and choose one of the following options:
  - **Style** (see above)
  - **Edit:** Opens the keyboard and to change the text in the text box.
  - **Flatten**
  - **Copy:** Copy the text to the Clipboard.
  - **Duplicate**
  - **Delete** to delete the text.

### 3.3.2 VIEW AND DELETE ANNOTATIONS AND MARKUPS

#### To view all annotations and markups in a document:


1. In the open document, tap and select the annotations pane icon  in the left corner of the menu bar at the bottom. Switch from the **Outline** to the **Annotations** page.

All annotations are displayed in the **Annotation** pane on the left side.

2. To jump to an annotation or markup, tap on it.
3. Close the menu by tapping on the annotations pane icon again.

**Note:** You can delete all markups and annotations at once or sort by page number, creation or modification date by selecting the more options menu in the bottom-left corner of the annotations page.

#### To delete comments from the Annotations pane:

1. In the open document, tap and select the annotations pane icon  in the left corner of the menu bar at the bottom. Switch from the **Outline** to the **Annotations** page.

2. Tap and hold **Edit** at the bottom of the pane.
3. Tap on the red minus icon of the markup or annotation you want to delete and select **Delete**.
4. Select **Done** at the bottom of the pane.
5. Close the menu by tapping on the annotations pane icon again.


**Note:** You can delete all markups and annotations or sort by page number, creation or modification date by selecting the more options menu in the bottom-left corner of the annotations page.

### 3.3.3 CHANGE THE OUTLINE OF DOCUMENTS

You can add, change, and remove sections of a document.

1. Open the document in which you want to change the **Outline**.
2. Tap into the document.

The tools and menu bars are displayed at the top and at the bottom.

3. In the open document, select the annotations pane icon  in the left corner of the menu bar at the bottom and switch from the **Annotations** to **Outline**, if necessary.

All Outline elements are displayed in the **Outline** pane on the left side.

4. To jump to a section, tap on it. To expand or collapse a section with subsections, tap on the arrow next to it. You can collapse or expand all sections by tapping on one of the two icons at the bottom-left corner of the **Outline** pane.
5. Tap Edit in the bottom-right corner of the **Outline** pane to change the Outline. You can:
  1. Add new elements by tapping on the plus icon at the bottom. Add a title in the dialog and confirm with **Done**.
  2. Edit any element by tapping into the circle next to it and then tapping the edit icon at the bottom. Confirm in the dialog with **Done**.
  3. Delete any element by tapping into the circle next to it and then tapping the trash can.
  4. Move any element by tapping into the circle next to it and then tapping the arrows icon. Move the element in the dialog and confirm with **Move**.
6. Select **Done** at the bottom of the pane.
7. Close the menu by tapping on the annotations pane icon again.

## 3.4 WORK WITH VOTES IN A FLOW

With the MeetingSuite by Brainloop app, you can easily participate both in circular resolutions and in votes that are included in meetings. On the votes page, you can cast your vote, change your vote, and view the vote results.

### To open the votes page:

- > **Resolutions:** The votes page is visible when you select a circular resolution.
- > **Meetings:** When a vote is included in a meeting, select the vote icon next to it.

### 3.4.1 CAST YOUR VOTE

#### To cast your vote:

1. Open the votes page, either
  - for **Resolutions:** The votes page is opened when you select a circular resolution or
  - for votes in **Meetings:** For the relevant vote, select **Vote for this topic**.
2. In the vote area of the vote details page, select **Approve**, **Reject**, or **Abstain**.
3. Add a comment in the **Comment** field.
4. Select **OK**.

Your vote is immediately visible to all vote participants.

**Note:** You can change your vote at any time while voting is still in progress.

### 3.4.2 CHANGE YOUR VOTE

As long as the vote is open, you can change your vote, even if you have already submitted it.

#### To change your vote:

1. Open the votes page, either
  - for **Resolutions:** The votes page is opened when you select a circular resolution or
  - for votes in **Meetings:** For the relevant vote, select **Vote for this topic**.
2. In the vote area of the vote details page, select **Approve, Reject, or Abstain**.
3. Add a comment in the **Comment** field.
4. Select **OK**.

Your vote is immediately visible to all vote participants.

### 3.4.3 VIEW VOTE RESULTS

#### To view the results of a vote:

1. Open the vote details.
  - **Resolutions:** The list of circular resolutions already shows the status and result of a vote. Select an item to view all vote details.
  - **Meetings:** Select a meeting and, for the relevant vote, select **Vote for this topic** to view all vote details.  
**Note:** The **Attached Documents** section is not available for votes in meetings.
2. On the details page of the vote, the following details are shown:
  - **Name** of the voter and **Status** of his vote.
  - **Name** of the person who organized the vote ("Vote organizer").
  - **Vote result:** If a vote is finished, this area shows the overall vote decision and the number of individual votes (**Approved, Rejected, Abstained, and Not voted**).
  - **Votes:** This area shows the names and votes of the voting participants and their comments.
3. To close the page, select the **X** icon at the top left.

## 3.5 WORK WITH ACTIONS

With the MeetingSuite by Brainloop app, you can view and work on your **Tasks** and **Polls** from the **Actions** menu. This button is shown in your app if the Action Center is activated for your organization.

For information on how to create tasks and polls in the Action Center via the web interface of Brainloop MeetingSuite, please refer to [The Action Center](#).

### 3.5.1 VIEW TASKS AND TASK DETAILS

#### To view the list of tasks:

- > To open the **Tasks** list, select **Actions > Tasks** in the bottom navigation bar.
- > For every task, the task name, current status, owner (**Created by**), start and due dates as well as information on the number of attached files and added comments are displayed.
- > To sort the tasks by date (“Oldest to newest” and “Newest to oldest”), select the more options icon in the top-right corner and choose a sorting order.

#### To view details for a task:

1. Select the **Actions** icon in the bottom navigation bar and then select **Tasks**.  
A list of the tasks that you have created or that are assigned to you opens.
2. Select the desired task to display the task’s details.

#### The following task details and options are available:

- > **Details** tab:
  - **Start** date and **Creation** date
  - Owner (**Created by**)
  - **Description**
  - **Comments** section: here you can add, edit, or delete your comments.
- > **Files** tab:
  - A list of the attached files.  
Select the desired file to view it.
- > **Participants** tab:

- **Assignee, Co-owners, Watchers** tabs

### 3.5.2 VIEW SUBTASKS AND SUBTASK DETAILS

#### To view the subtasks of a task:

1. Select a task with subtasks from the **Tasks** list.
2. Select **Show subtasks**.  
A list of the subtasks of the relevant tasks opens.
3. Select the desired subtask to view the subtask's details.

#### The following subtask details and options are available:

- > **Details** tab:
  - **Start** and **Creation** date
  - Owner (**Created by**)
  - **Description**
  - **Comments** section: here you can add, edit, or delete your comments.
- > **Files** tab:
  - A list of the attached files.  
Select the desired file to view it.
- > **Participants** tab:
  - **Assignee, Co-owners, Watchers** tabs

### 3.5.3 VIEW POLLS AND POLL DETAILS

#### To view the list of polls:

- > To open the list of polls, select **Actions > Polls** in the bottom navigation bar.
- > For every poll, the poll name, current status, owner (**Created by**), start and due dates as well as information on the number of responses, attached files, and added comments are displayed.
- > To sort the polls by date ("Oldest to newest" and "Newest to oldest"), select the more options icon in the top-right corner and choose a sorting order.

### To view details for a poll:

1. Select the **Actions** icon in the bottom navigation bar and then select **Polls**.  
A list of the polls that you have created or that are assigned to you opens.
2. Select the desired poll to display the poll's details.
3. The following poll details and options are available:
  - > **Details** tab:
    - **Start** date and **Due** date
    - **Creation** date
    - Owner (**Created by**)
    - **Description**
    - **Question** section, including the question and the answer options with the current results.  
Here you can cast your vote, see "[Cast your vote in a poll](#)".
    - **Comments** section: here you can add, edit, or delete your comments.
  - > **Files** tab:
    - A list of the attached files.  
Select the desired file to view it.
  - > **Participants** tab:
    - **Respondents, Co-owners, Watchers** tabs

### 3.5.4 CAST YOUR VOTE IN A POLL

#### To cast your vote in a poll:

1. Select **Actions > Polls** in the bottom navigation bar and open the desired poll.
2. In the **Question** section, select either one answer option or, if desired, more in the case of a multi-select question. Your answer is immediately visible to all poll participants.

**Note:** You can change your answers at any time while the poll is active.

### 3.5.5 CHANGE YOUR VOTE IN A POLL

As long as the poll is active, you can change your vote even if you have already selected your answers.

### To change your vote:

1. Open the relevant poll.
2. In the **Question** section, simply select another answer option or in case of a multi-select question, deselect your previous choices, and then select other options.

Your answer is immediately visible to all poll participants.

## 3.5.6 VIEW POLL RESULTS

### To view the results of a poll:

1. Select the **Actions** icon in the bottom navigation bar and then select **Polls**.  
A list of the polls that you have created or that are assigned to you opens.
2. Select the desired poll to display the poll's details.  
On the **Details** tab of the poll, a graph as well as the overall percentages and the number of votes cast are given for each answer option.
3. Select **Show results** to open an overview of the poll's results.
4. To see who voted for which answer, select **Show individual responses** underneath the relevant answer option.

## 3.6 WORK WITH FILES

The **Files** page gives you access to the files and folders in your personal data room and in your team data rooms:

- > My data room
- > Team data rooms, if available

**Note:** You cannot create or modify folders in the MeetingSuite by Brainloop app, but you can delete them by tapping and holding the folder name and then selecting **Delete**.

### 3.6.1 VIEW FILES FROM YOUR DATA ROOMS

#### To open a file in the MeetingSuite by Brainloop app:

1. Go to the **Files** view and select your personal data room or a team data room.

**Note:** To open a document that is attached to a meeting or a circular resolution, go to the **Meetings or Resolutions** view and select a meeting or circular resolution.

2. Select a document to open it directly in the MeetingSuite app.

For further information on commenting on documents, see sections "[Add annotations and markups to documents](#)" and "[View and delete annotations and markups](#)".

**Note:** There is a whitelist of file types that we allow to be opened directly in the app. File types that are not on the whitelist can only be downloaded to the device.

### Supported file types:

Currently, MeetingSuite by Brainloop supports the following file types:

- > Images (.gif, .jpg, .jpeg, .png)
- > Word (.doc, .docx, .docm, .dotx, .dotm)
- > Excel (.xls, .xlsx, .xlsm, .xltx, .xltm)
- > PowerPoint (.ppt, .pptx, .pps, .ppsx, .pptm, .potx, .potm)
- > Adobe Acrobat (.pdf)
- > Text file (.txt)
- > Rich-text file (.rtf)

### Other file types:

The MeetingSuite by Brainloop app does not support audio and video files (e.g. .wav, .mp3, .mp4, .avi, etc.).

However, you can download these files and play them using the corresponding iOS apps. Make sure the downloaded audio or video files are properly protected on your device.

## 3.6.2 VIEW SHARED FOLDERS

You can view the folders that have been shared with you and folders that you have shared with someone in the MeetingSuite web version.

### To view shared folders:

1. Go to the **Files** view and select either **Shared with me** or **Shared by me**.
2. Select a folder to open its items directly in the **MeetingSuite by Brainloop** app.

### 3.6.3 SHARE FILES

Currently, the **Send link** or **Share folder** functionalities from the MeetingSuite web version are not available in the MeetingSuite by Brainloop app. Use the native **Share** option of your iOS device to provide others with a copy of a file from your personal data room or team data room from the app. Make sure the person receiving the file is authorized to get it.

#### To share a file via the native iOS "Share" option:

1. Tap on the name of a file and hold.
2. Select **Share**.
3. Select the app you want to use to share the file.
4. Complete the iOS share process.

### 3.7 SEARCH FOR ITEMS

Use the **Search** page to easily find your meetings, meeting documents, circular resolutions, or votes. You can search for the name or part of the name of one of these items. **Note:** To find documents in your data room folders, you first have to open these folders in the MeetingSuite by Brainloop app once to ensure that they are indexed.

#### To search for items:

1. Select **Search** in the bottom navigation bar.
2. Select your category (**All, Documents, Flows**).
3. Tap in the **Search** field.  
The device's keyboard opens automatically.
4. Type at least two characters contained in the name of the item.  
The matching items are displayed immediately.
5. To open the item, tap on it.

## 3.8 MANAGE SETTINGS AND ACCOUNT DETAILS

The app is installed with certain default settings, such as locking the app after a user's inactivity. You can customize these default settings on the **Profile** page at any time. On this page, you can also change your access code or view support information, for example.

### To access the Profile page:

- > Select the **Profile** icon (your initials by default) in the top-left corner of the app.

### 3.8.1 CHANGE ORGANIZATION

If your Brainloop MeetingSuite account is connected to several organizations, you can switch between those organizations.

### To switch organizations:

1. Select the **Profile** icon (your initials by default) in the top-left corner of the app.
2. Select **Change organization**.
3. Select your organization.

**Note:** If you want to switch to a different account, you need to sign out of your current account on the **Profile** page.

### 3.8.2 SETTINGS

On the **Settings** page, you can view your profile information, change the access code, define the automatic lock timer and enable biometric authentication.

### To access the Settings page:

1. Select the **Profile** icon (your initials by default) in the top-left corner of the app.
2. Select **Settings**.

### Profile information:

- > At the top of the **Settings** page, you can view all details for the selected account, such as your name, email address, and phone number.

### To enable Biometric authentication:

- > Activate **Biometric authentication** by toggling the slider next to it. Afterwards, you can access the MeetingSuite by Brainloop app via TouchID or FaceID if you have configured biometric authentication for your iOS device.

### To change the Automatic lock timer:

- > Tap on **Automatic lock** and change the number of minutes using the slider in the dialog. Tap anywhere outside the dialog to get back to the **Settings** page. MeetingSuite by Brainloop is now locked automatically once the set number of minutes has passed, provided you did not interact with the app in that time frame.

**Note:** If your iOS device locks itself the MeetingSuite by Brainloop app will lock itself, too.

### Change your access code:

1. Select **Change access code**.
2. Type in your **current access code** in the corresponding line.
3. Type in your **new access code** in the corresponding line.
4. Confirm your **new access code** by typing it into corresponding line.
5. Confirm by selecting **OK**.

### Switch to a complex access code:

You can switch to a more complex access code. The simple access code requires 6 digits. The **Complex access code** requires at least six characters and allows for digits, special characters, letters, and capital letters.

1. Select **Change access code**.
2. Toggle the switch next to **Complex access code**.
3. Type in your **current access code** in the corresponding line.
4. Type in your **new access code** in the corresponding line.
5. Confirm your **new access code** by typing it into corresponding line.
6. Confirm by selecting **OK**.

### 3.8.3 HELP

You can open the present guide and other user guides or admin guides on your mobile device or contact the Brainloop Support if you are connected to the internet.

#### To open the online help from within the app:

1. Select **Help** to open the [How can we help?](#) page for Brainloop MeetingSuite in a browser window.
2. Select the relevant help topic or user guide from the page (see also [FAQs](#)).

#### To contact Brainloop Support:

1. Select **Help** to open the [How can we help?](#) page for Brainloop MeetingSuite in a browser window.
2. Navigate to the bottom and select **Contact Support**. Here, you find the email address and the phone numbers to contact [Brainloop Support](#).

This is the preferred way of communicating issues with MeetingSuite by Brainloop to Brainloop Support.

### 3.8.4 LEGAL NOTICE, PRIVACY NOTICE, TERMS OF USE

#### To read the Brainloop Legal notice, Privacy notice, or Terms of Use for using the Brainloop services:

- > Select **Legal notice**, **Privacy notice**, or **Terms of use**.

Note: Brainloop's Legal notice, Privacy notice, or Terms of use are hosted on Brainloop's [Customer Service Portal](#).

### 3.8.5 LOCK THE APP AND SIGN OUT

#### To lock the app:

- > Select **Lock app** and you are navigated to the app lock screen and have to enter your access code again to use MeetingSuite by Brainloop.

#### To sign out of your account:

- > Select **Sign out** and you are navigated to the app lock screen.