document_map: true

SoloStaff Meeting Secretary - User Guide

Document Map

- **Using the Terminal** - This section explains how to use the Terminal, a tool that provides direct access to all CLI commands within the browser.

- **Settings** - This section explains how to configure API credentials and application preferences on the Settings page.

- **Troubleshooting** - This section explains how to troubleshoot common issues that may arise when using the application.

- **Getting Help** - This section explains how to get help and support when using the product or service.

- **Appendix: Quick Reference** - This section provides a quick reference guide to the key concepts, features, and functionality covered in the documentation.

Version 0.7.0 Alpha - Early Release

Table of Contents

Welcome

Thank you for joining the SoloStaff Meeting Secretary Early Release program!

SoloStaff Meeting Secretary is an AI-powered application that automates the entire meeting lifecycle for Microsoft 365 users. It handles:

- **Agenda Collection**: Automatically requests and collects agenda items from participants
- **Agenda Generation**: Uses AI to compile submissions into professional agendas
- **Meeting Scheduling**: Creates Microsoft Teams meetings with proper invitations
- **Minutes Generation**: Automatically generates meeting minutes from Teams transcripts
- **Distribution**: Sends finalized agendas and minutes to all participants

All of this happens automatically based on your meeting schedule, with human approval at key checkpoints to ensure quality.

System Requirements

Supported Operating Systems

- **Windows 10/11** (64-bit)
- **macOS 12 (Monterey)** or later
- **Linux** (Ubuntu 20.04+, Debian 11+, or equivalent)

Microsoft 365 Requirements

- Microsoft 365 Business Basic, Business Standard, Business Premium, E3, or E5 subscription
- Microsoft Teams license (included in most Microsoft 365 plans)
- Ability to register applications in Microsoft Entra ID (Azure AD)
- Administrator consent may be required by your organization

OpenAI Requirements

- OpenAI API account with billing enabled
- API key with access to GPT-5+ models
- Recommended: $10-50 monthly budget for API usage

Network Requirements

- Internet connection for Microsoft 365 and OpenAI API access
- Outbound HTTPS (port 443) to:
- `login.microsoftonline.com`
- `graph.microsoft.com`
- `api.openai.com`

Installation

Step 1: Extract the Archive

1. Locate the downloaded archive file: `solostaff-meeting-secretary-0.7.0-alpha.zip`
2. Extract the archive to your preferred location:
3. **Windows**: Right-click → "Extract All..."
4. **macOS**: Double-click the archive
5. **Linux**: `unzip solostaff-meeting-secretary-0.7.0-alpha.zip`

Step 2: Locate the Application

After extraction, you'll find:

```
solostaff-meeting-secretary/
├── solostaff-secretary          # Application (Linux/macOS)
├── solostaff-secretary.exe      # Application (Windows)
└── SoloStaff-User-Guide.pdf     # This guide
```

Step 3: Make Executable (Linux/macOS only)

On Linux or macOS, you may need to make the application executable:

```
chmod +x solostaff-secretary
```

Step 4: (Optional) Add to PATH

For convenient command-line access, add the application to your system PATH:

Windows:

1. Open System Properties → Advanced → Environment Variables
2. Edit the `Path` variable and add the folder containing `solostaff-secretary.exe`

macOS/Linux: Add to your shell profile (`~/.bashrc` , `~/.zshrc` , etc.):

```
export PATH="/path/to/solostaff-meeting-secretary:$PATH"
```

First Launch

Starting the Application

Windows:

- Double-click `solostaff-secretary.exe` , or
- Open Command Prompt and run: `solostaff-secretary.exe ui`

macOS/Linux:

- Open Terminal and run: `./solostaff-secretary ui`

Initial Setup

On first launch, the application will:

1. Create a configuration directory at `~/.solostaff-secretary/`

2. Initialize the database

3. Open your default web browser to `http://localhost:8080`

You'll see the Dashboard with a message indicating that configuration is needed.

The User Interface

The application runs a local web server and provides a modern web interface accessible at `http://localhost:8080`. The interface includes:

- **Dashboard**: Overview of meetings, workflows, and recent activity

- **Meetings**: Detailed view of each meeting's workflow progress

- **Approvals**: Review and approve AI-generated content

- **Terminal**: Run commands directly from the browser

- **Settings**: Configure API credentials and preferences
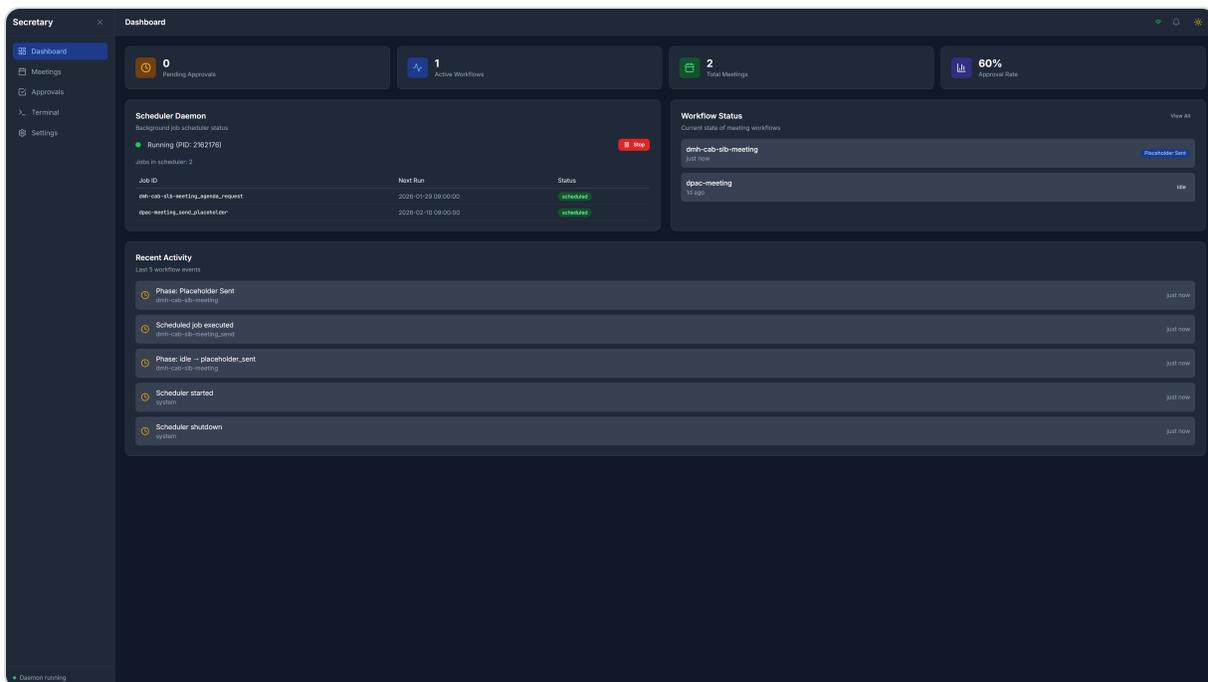
The Dashboard provides an at-a-glance view of your meetings and workflow status

---

Microsoft 365 Setup (OAuth)

SoloStaff Meeting Secretary needs permission to access your Microsoft 365 account to send emails, create meetings, and retrieve transcripts. This is done through a secure OAuth connection.

What You'll Need

- Access to the Azure Portal
- Administrator or Application Administrator role in your organization
- Approximately 15-20 minutes to complete setup

Step 1: Create an App Registration

1. Go to portal.azure.com
2. Sign in with your Microsoft 365 administrator account

3. Search for "**App registrations**" in the top search bar

4. Click **App registrations** in the results

Azure Portal Search

1. Click **+ New registration**

Step 2: Configure the App Registration

Fill in the registration form:

Field	Value
Name	`SoloStaff Meeting Secretary`
Supported account types	"Accounts in this organizational directory only"
Redirect URI - Platform	Public client/native (mobile & desktop)
Redirect URI - Value	`http://localhost:8400`

Click **Register**.

Step 3: Copy Your Application IDs

After registration, you'll be taken to the app's Overview page. Copy these two values - you'll need them later:

Value	Where to Find It
Application (client) ID	Displayed prominently on the Overview page
Directory (tenant) ID	Also on the Overview page, below the client ID

Tip: Click the copy icon next to each ID to copy it to your clipboard.

Step 4: Configure API Permissions

1. In the left sidebar, click **API permissions**
2. Click **+ Add a permission**
3. Select **Microsoft Graph**
4. Select **Delegated permissions**
5. Search for and check each of these permissions:

Permission	Purpose
`Mail.ReadWrite`	Read and write emails
`Mail.Send`	Send emails on your behalf
`Calendars.ReadWrite`	Create and manage calendar events
`OnlineMeetings.ReadWrite`	Create and manage Teams meetings
`User.Read`	Read your basic profile

1. Click **Add permissions**

Step 5: Grant Admin Consent (If Required)

If your organization requires admin consent:

1. Click **Grant admin consent for [Your Organization]**
2. Confirm when prompted
3. Wait for all permissions to show "Granted" status

Note: If you don't have admin permissions, you may need to request consent from your IT administrator.

Step 6: Enable Public Client Flows

This is a critical step that's often missed:

1. In the left sidebar, click **Authentication**

2. Scroll down to **Advanced settings**

3. Find **Allow public client flows**

4. Set it to **Yes**

5. Click **Save**

Step 7: Enter Credentials in SoloStaff

1. Open the SoloStaff Meeting Secretary application

2. Navigate to **Settings** in the sidebar

3. In the **API Credentials** section, select the **Azure AD** tab

4. Enter your credentials:

5. **Client ID**: Paste the Application (client) ID you copied

6. **Tenant ID**: Paste the Directory (tenant) ID you copied

7. **Client Secret**: Leave blank (not needed for device code flow)

8. Click **Save** for each field
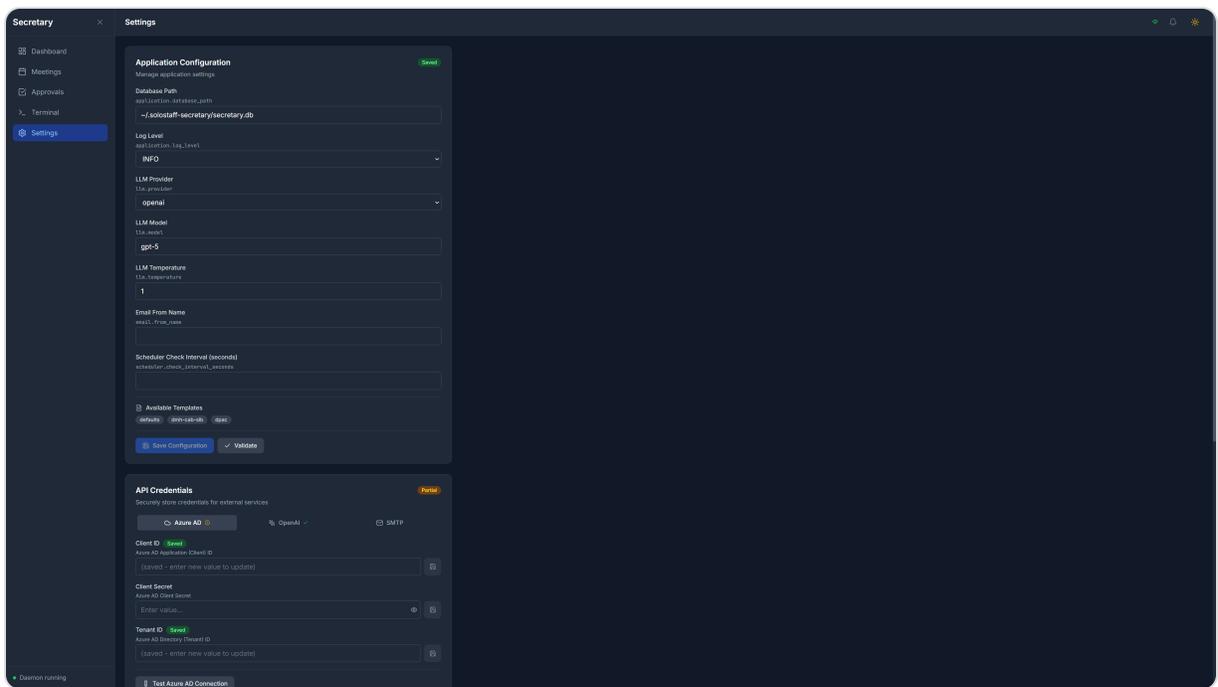
The Settings page where you configure Azure AD credentials

Step 8: Authenticate

1. In Settings, find the **Microsoft 365 Authentication** section

2. Click **Sign In**

3. A device code will appear - copy it

4. Click the link or go to microsoft.com/devicelogin

5. Enter the device code

6. Sign in with your Microsoft 365 account

7. Review and accept the permissions

8. Return to SoloStaff - you should see "Connected" status

OpenAI API Setup

SoloStaff Meeting Secretary uses OpenAI's GPT models to generate professional agendas and meeting minutes from transcripts.

Step 1: Create an OpenAI Account

1. Go to platform.openai.com
2. Click **Sign up** (or **Log in** if you have an account)
3. Complete the registration process

Step 2: Set Up Billing

OpenAI API requires a payment method:

1. Go to platform.openai.com/account/billing
2. Click **Add payment details**
3. Enter your payment information
4. Set a monthly spending limit (recommended: $10-50 for typical usage)

Cost Estimate:

- Agenda generation: ~$0.05-0.10 per meeting
- Minutes generation: ~$0.10-0.50 per meeting (depends on transcript length)
- Monthly cost for weekly meetings: ~$2-10

Step 3: Create an API Key

1. Go to platform.openai.com/api-keys
2. Click **+ Create new secret key**
3. Give it a name: `SoloStaff Meeting Secretary`
4. Click **Create secret key**
5. **Important:** Copy the key immediately - you won't be able to see it again!

Security Warning: Treat your API key like a password. Never share it or commit it to version control.

Step 4: Enter API Key in SoloStaff

1. Open the SoloStaff Meeting Secretary application
2. Navigate to **Settings** in the sidebar

3. In the **API Credentials** section, select the **OpenAI** tab

4. Enter your API key in the **OpenAI API Key** field

5. Click **Save**

Step 5: Verify Connection

The Settings page will show the connection status. You can also test from the Terminal:

1. Go to **Terminal** in the sidebar

2. Type: `config validate`

3. Press Enter

You should see confirmation that the OpenAI configuration is valid.

Configuring Your First Meeting

Now that your API credentials are configured, you can set up your first automated meeting.

Understanding the Configuration File

Meeting configuration is stored in `~/.solostaff-secretary/config.yaml`. You can edit this file directly or use a text editor.

Location:

- **Windows:** `C:\Users\YourName\.solostaff-secretary\config.yaml`
- **macOS/Linux:** `~/.solostaff-secretary/config.yaml`

Basic Meeting Configuration

Here's a minimal example for a monthly team meeting:

```yaml
meetings:
  - id: monthly-team-meeting
    name: "Monthly Team Meeting"
    active: true

    participants:
      - email: you@yourcompany.com
        name: Your Name
        role: organizer

      - email: colleague1@yourcompany.com
        name: Colleague One
        role: participant

      - email: colleague2@yourcompany.com
        name: Colleague Two
        role: participant

    schedule:
      recurrence: monthly
      day_of_month: 15
      time: "14:00"
      timezone: America/New_York
      duration_minutes: 60

      # Workflow timing
      placeholder_days_before: 7
      agenda_request_days_before: 5
      agenda_compilation_days_before: 2

    email:
      subject_prefix: "[Team Meeting]"
      from_address: you@yourcompany.com
      reply_to: you@yourcompany.com

    teams:
      create_meeting: true
      auto_record: true
      transcript_language: en-US
```

Key Configuration Options

Option	Description
`id`	Unique identifier for the meeting (no spaces)
`name`	Display name shown in the UI
`active`	Set to `true` to enable automation
`recurrence`	`once`, `daily`, `weekly`, or `monthly`
`day_of_month`	For monthly meetings: 1-31
`day_of_week`	For weekly meetings: Monday, Tuesday, etc.
`time`	Meeting start time in 24-hour format
`timezone`	IANA timezone (e.g., `America/New_York`, `Europe/London`)

Workflow Timing Explained

The automated workflow runs on a schedule relative to your meeting:

1. **placeholder_days_before** (default: 7)

2. Sends initial meeting invitation with Teams link

3. No agenda included yet

4. **agenda_request_days_before** (default: 5)

5. Emails participants requesting agenda items

6. Participants reply with their topics

7. **agenda_compilation_days_before** (default: 2)

8. AI compiles all submissions into a formal agenda

9. Agenda sent to you for approval

After the meeting:

- • Transcript is retrieved from Teams

- • AI generates meeting minutes

- • Minutes sent to you for approval

- • Approved minutes distributed to participants

Validating Your Configuration

After editing the configuration file:

1. Go to **Terminal** in the sidebar

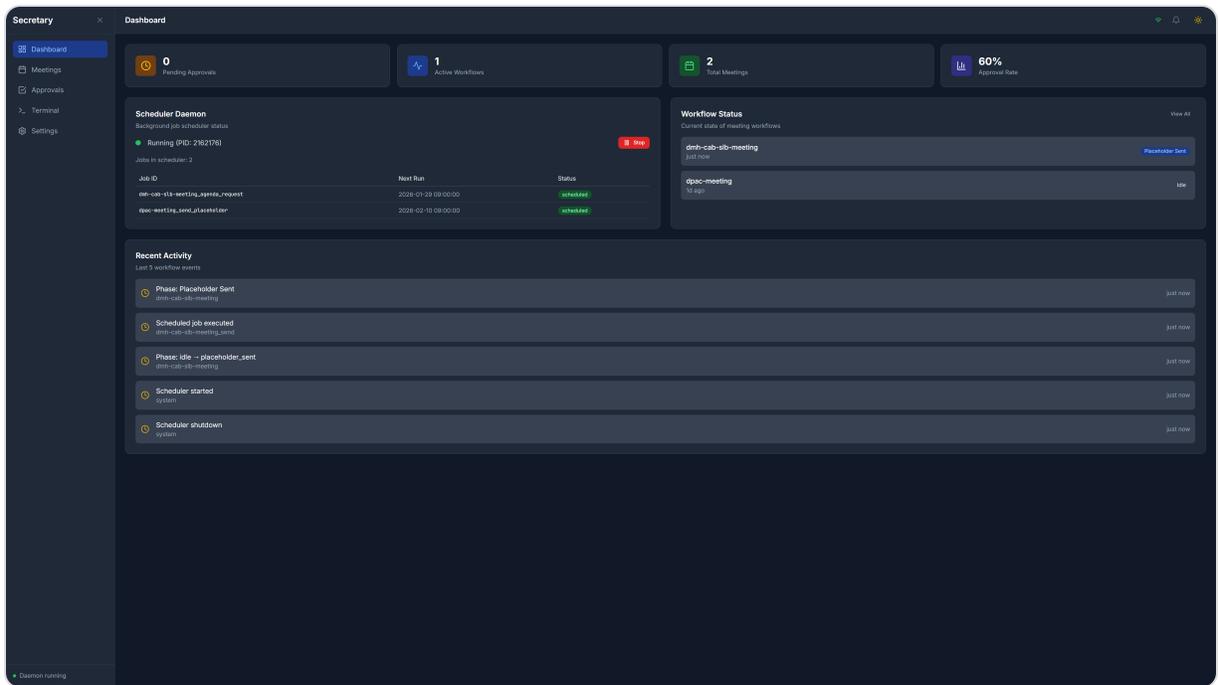2. Type: `config validate`

3. Press Enter

If there are errors, they will be displayed with guidance on how to fix them.

Using the Dashboard

The Dashboard is your central hub for monitoring meeting activity.

Status Cards

At the top of the Dashboard, you'll see four status cards:

Card	Description
Pending Approvals	Number of agendas or minutes waiting for your review
Active Workflows	Meetings currently in progress through the workflow
Total Meetings	Number of meetings configured in the system
Approval Rate	Percentage of AI-generated content approved vs. rejected

Scheduler Daemon

The **Scheduler Daemon** card shows the status of the background automation:

- **Running**: Automation is active and executing scheduled tasks
- **Stopped**: Automation is paused - click **Start** to resume

• **Jobs in Scheduler**: Number of pending automated actions

Workflow Status

The **Workflow Status** panel shows each meeting and its current state:

Status	Meaning
Idle	No active workflow; waiting for next scheduled meeting
Scheduled	Workflow is active and processing
Awaiting Approval	Paused, waiting for you to approve content

Recent Activity

The **Recent Activity** feed shows the last 5 workflow events, including:

• Phase transitions (e.g., "Generating Agenda → Awaiting Approval")

• Completed actions (e.g., "Agenda distributed")

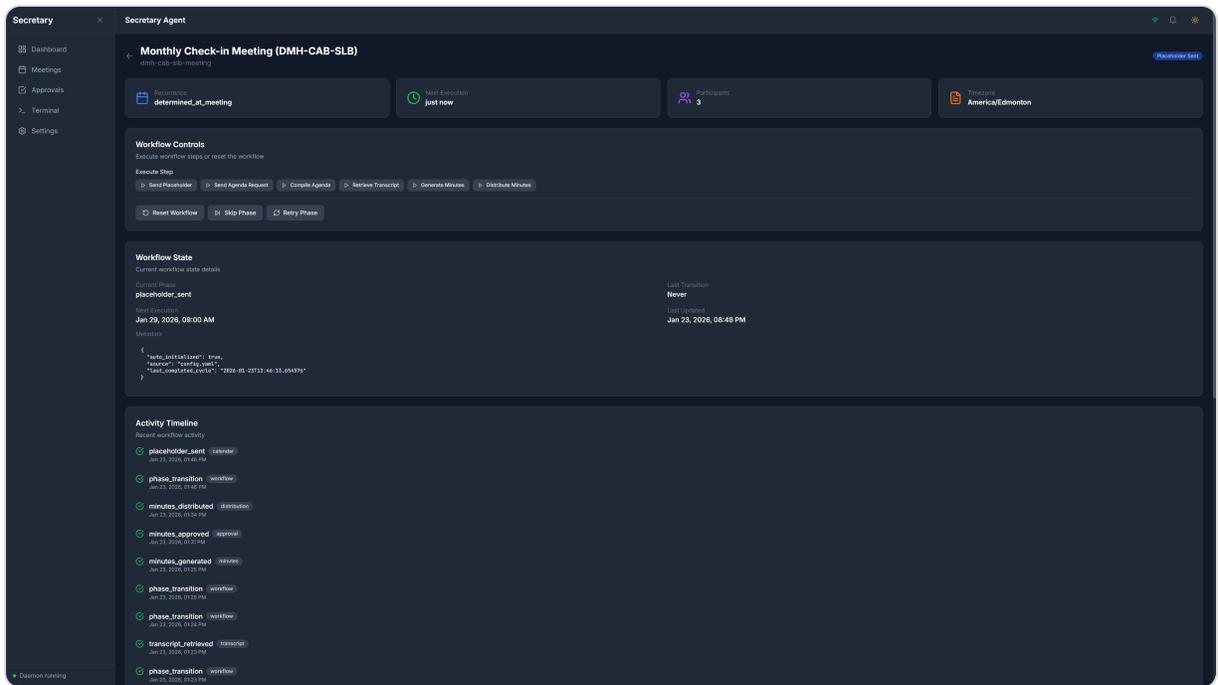• Approvals and rejections

---

Managing Meetings

The Meetings page provides detailed control over each meeting's workflow.
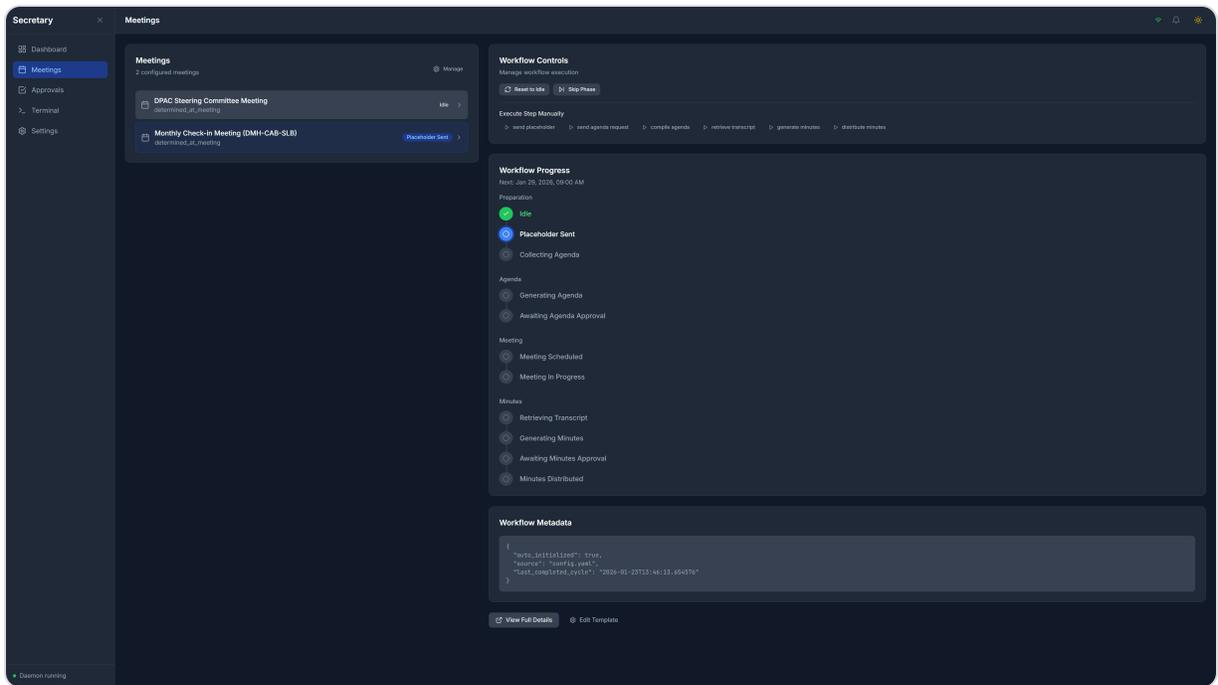
The Meetings page shows all configured meetings with quick status indicators

Meeting Detail View

When you select a meeting, you'll see the detailed view with all configuration options and workflow controls.

The meeting detail view shows workflow progress, configuration, and manual controls

Selecting a Meeting

The left panel lists all configured meetings. Click a meeting to view its details.

Workflow Controls

At the top of the meeting detail view:

Control	Action
Reset to Idle	Cancels current workflow and returns to idle state
Skip Phase	Skips the current phase and moves to the next

Warning: Use these controls carefully - they can interrupt automated processing.

Execute Step Manually

If you need to trigger a specific workflow step immediately:

1. Find the **Execute Step Manually** section
2. Click the step you want to run (e.g., "send agenda request")
3. Confirm when prompted

This is useful for testing or recovering from errors.

Workflow Progress

The **Workflow Progress** section shows all phases with checkmarks for completed steps:

Preparation Phase:

- Idle (starting state)
- Placeholder Sent
- Collecting Agenda

Agenda Phase:

- Generating Agenda
- Awaiting Agenda Approval

Meeting Phase:

- Meeting Scheduled
- Meeting In Progress

Minutes Phase:

- Retrieving Transcript
- Generating Minutes
- Awaiting Minutes Approval
- Minutes Distributed

Workflow Metadata

The bottom section shows technical details about the current workflow, including:

- Teams meeting URL

- Calendar event ID

- Timestamps for each action

Meeting Configuration

Each meeting has configurable settings for schedule, participants, and templates:

Configure meeting schedule, participants, and email settings

Template Customization

You can customize the agenda and minutes templates for each meeting:

Secretary Agent

< Back **Monthly Check-in Meeting (DMH-CAB-SLB)**
dmh-cab-slb

Dashboard
Meetings
Approvals
Terminal
Settings

⚙ Configuration   📄 Agenda Template   📄 Minutes Template   ⊘ Stylesheets

Agenda Template
Edit the agenda markdown template

```
# Meeting Agenda: {{meeting_name}}

**Date:** {{meeting_date}}
**Time:** {{meeting_time}} {{default timezone ""}}
**Location:** {{default meeting_location "Virtual Meeting"}}

**Organizer:** {{organizer_name}} {{{organizer_email}}}

---

## Previous Meeting Follow-up

{{#if previous_action_items}}
The following action items from previous meetings require attention:

| # | Action Item | Assigned To | Status |
|---|-------------|-------------|--------|
{{#each previous_action_items}}
| {{inc @index}} | {{task}} | {{assignee}} | {{default status "Open"}} |
{{/each}}
{{else}}
No open action items from previous meetings.
{{/if}}

---
```

💾 Save Agenda Template

● Daemon running

Customize the agenda template with placeholders and formatting

---

Secretary Agent

< Back **Monthly Check-in Meeting (DMH-CAB-SLB)**
dmh-cab-slb

Dashboard
Meetings
Approvals
Terminal
Settings

⚙ Configuration   📄 Agenda Template   📄 Minutes Template   ⊘ Stylesheets

Minutes Template
Edit the minutes markdown template

```
# Meeting Minutes: {{meeting_name}}

**Date:** {{meeting_date}}
**Time:** {{meeting_time}}
**Duration:** {{default meeting_duration "Not recorded"}}
**Location:** {{default meeting_location "Virtual Meeting"}}

---

## Attendees

{{#if attendees}}
{{#each attendees}}
- {{this}}
{{/each}}
{{else}}
- Attendee list not available
{{/if}}

{{#if absent_participants}}
### Absent
{{#each absent_participants}}
- {{this}}
{{/each}}
{{/if}}
```
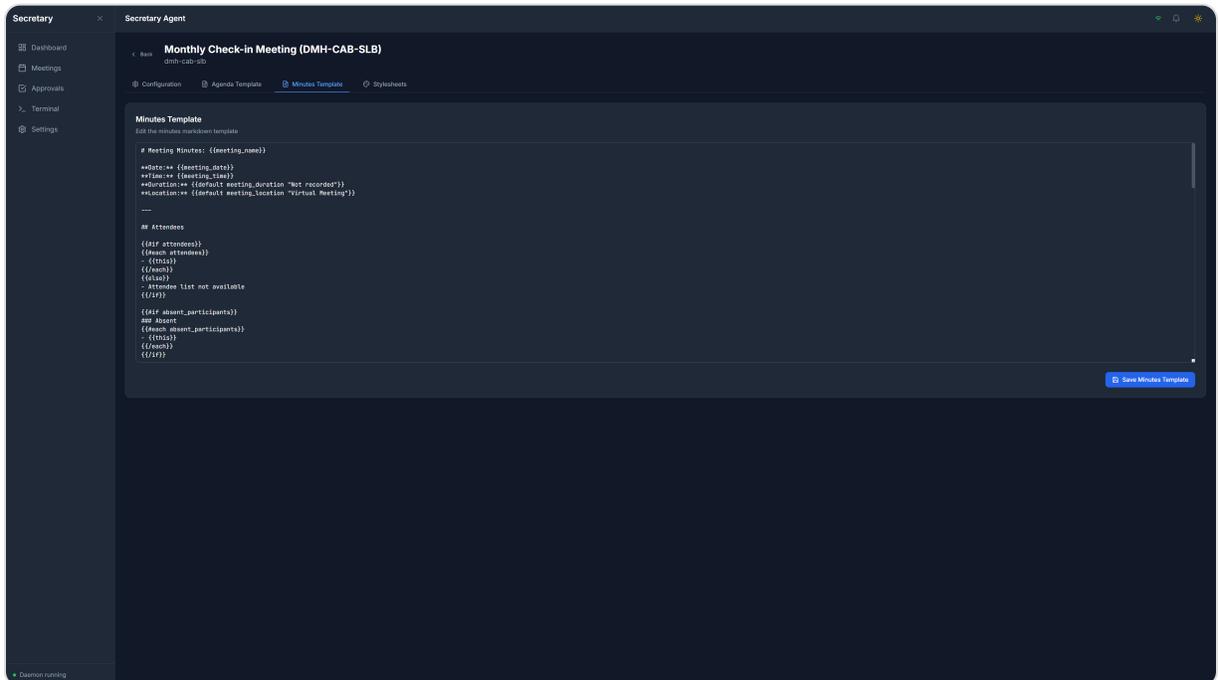
💾 Save Minutes Template

● Daemon running

Customize the minutes template for consistent formatting
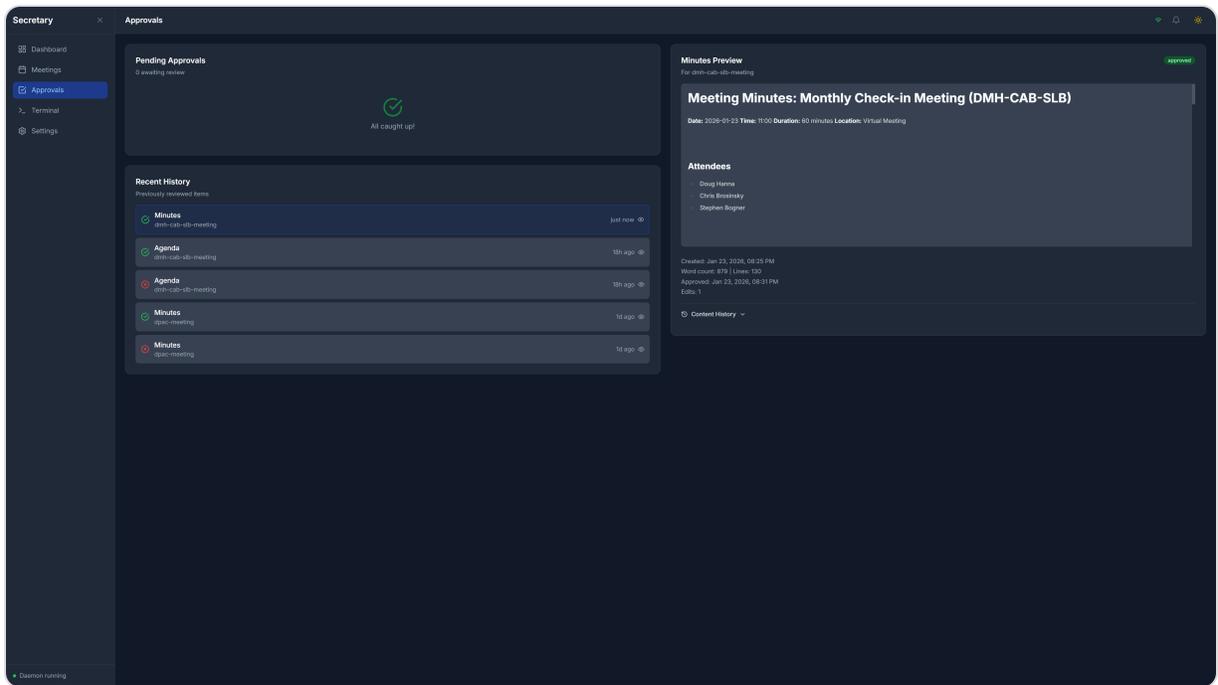
Stylesheet Settings

Configure the visual styling for generated documents:
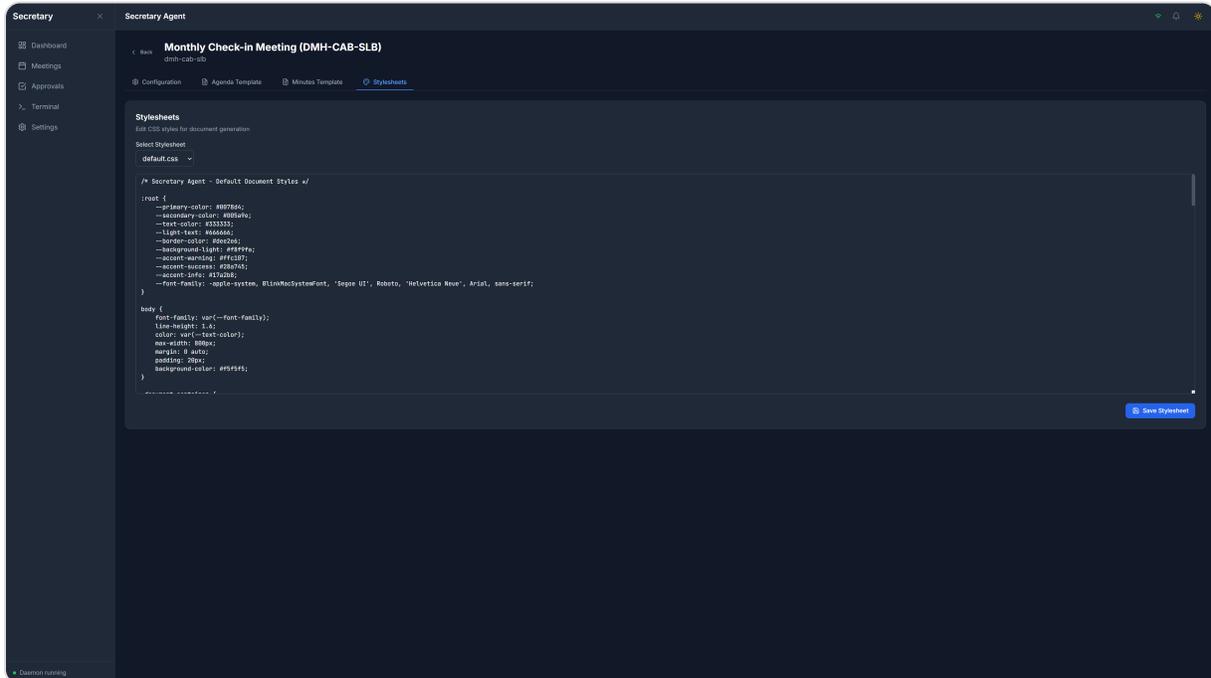
Adjust PDF styling and email formatting options

Reviewing Approvals

The Approvals page is where you review and approve AI-generated content before it's distributed.

Pending Approvals

When an agenda or minutes document needs your review:

1. It appears in the **Pending Approvals** section
2. Click on an item to see the preview
3. Review the content carefully

Approval Actions

After reviewing, you can:

Action	Result
Approve	Content is distributed to participants
Edit	Make changes before approving
Reject	Content is discarded; you can regenerate it

Recent History

The **Recent History** section shows previously reviewed items with their status:

- Green checkmark: Approved
- Red X: Rejected

Click any historical item to view its content.

Best Practices for Review

1. **Check for accuracy**: Verify names, dates, and decisions are correct
2. **Review action items**: Ensure assignees and due dates are accurate
3. **Verify confidentiality**: Confirm no sensitive information should be redacted
4. **Check formatting**: Ensure the document is professionally formatted

---

Using the Terminal

The Terminal provides direct access to all CLI commands from within the browser.
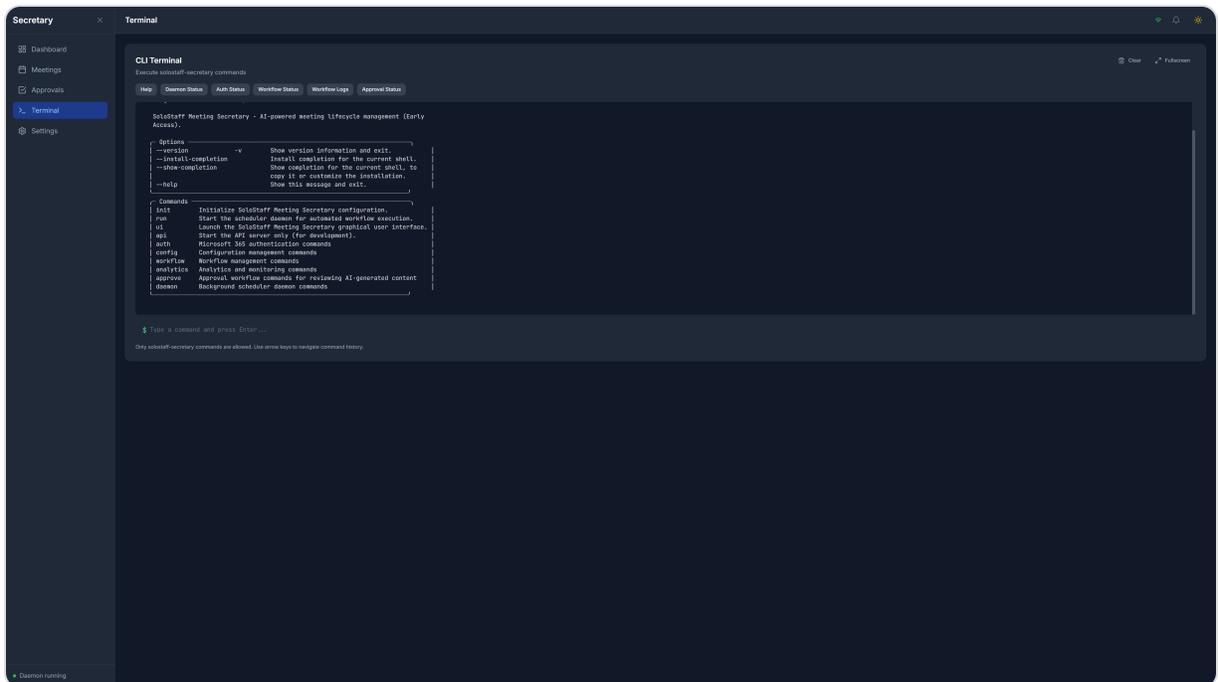
Quick Action Buttons

At the top, you'll find buttons for common commands:

- **Help**: Show available commands

- **Daemon Status**: Check scheduler status

- **Auth Status**: Check Microsoft 365 connection

- **Workflow Status**: Show current workflow state

- **Workflow Logs**: View recent activity logs

- **Approval Status**: Check pending approvals

Common Commands

Command	Description
`--help`	Show all available commands
`auth status`	Check Microsoft 365 authentication
`auth login`	Start authentication flow
`config validate`	Validate configuration file
`workflow status`	Show current workflow state
`workflow logs`	View recent workflow logs
`daemon status`	Check scheduler daemon status

Command Examples

Check authentication:

```
auth status
```

View last 50 log entries:
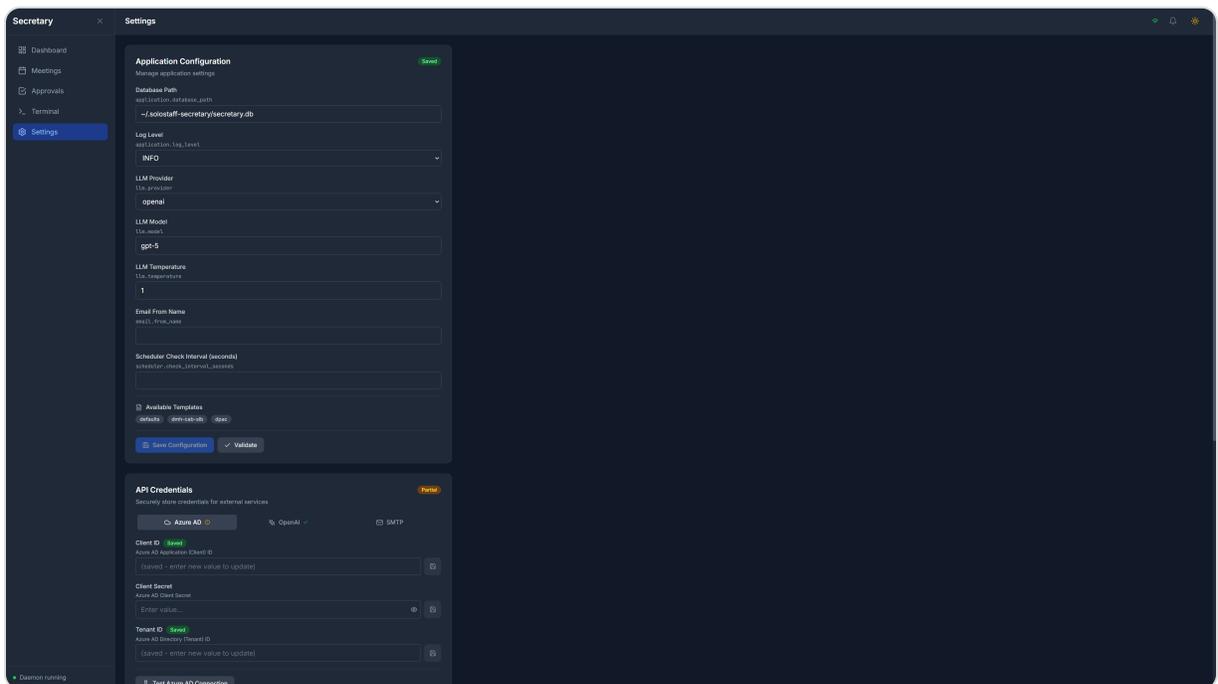
```
workflow logs --lines 50
```

View only errors:

```
workflow logs --level ERROR
```

Show help for a specific command:

```
workflow --help
```

Settings

The Settings page allows you to configure API credentials and application preferences.

API Credentials

Configure connections to external services:

Azure AD Tab:

- Client ID: Your Azure app registration client ID

- Client Secret: Leave blank for device code flow

- Tenant ID: Your Azure directory (tenant) ID

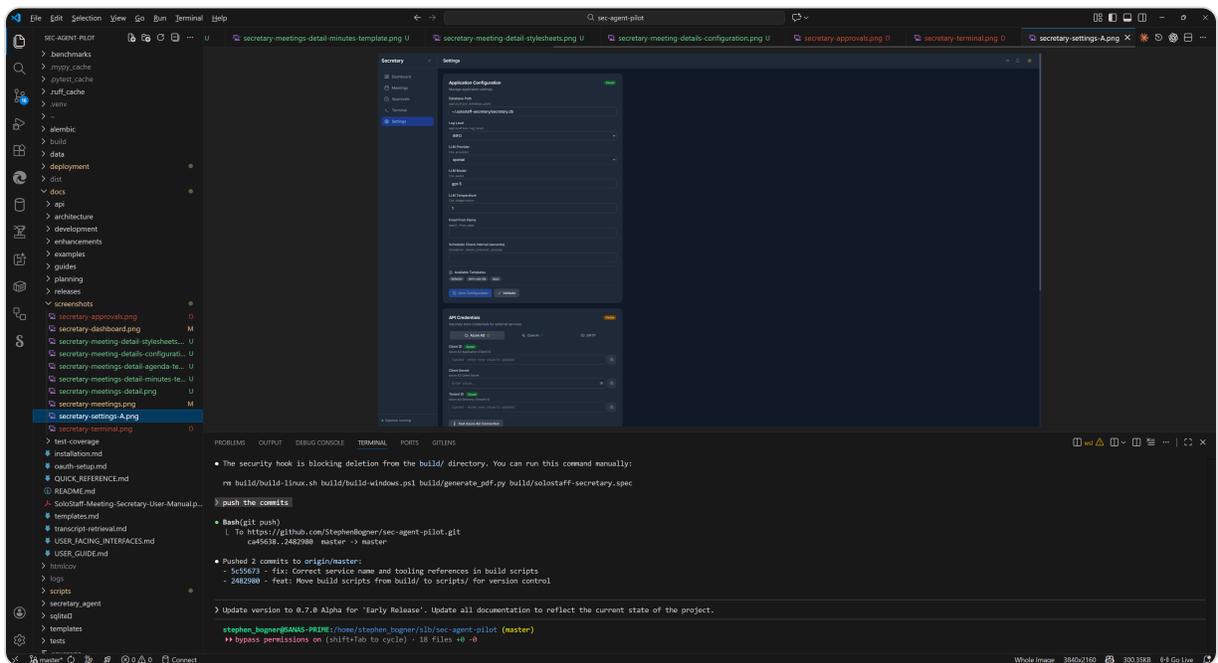**OpenAI Tab:**

• OpenAI API Key: Your OpenAI API key

SMTP Tab (Optional):

• Configure custom SMTP server if not using Microsoft 365

Microsoft 365 Authentication

Shows your current authentication status:

• **Connected**: Authenticated as your-email@domain.com

• **Refresh Token**: Request a new token

• **Sign Out**: Disconnect from Microsoft 365

Additional settings including appearance, system info, and developer resources

Appearance

• **Dark Mode**: Toggle dark/light theme

System Information

- **Database**: Location of the SQLite database file
- **Version**: Current application version

Developer Resources

Links to API documentation:

- **Swagger UI**: Interactive API explorer
- **ReDoc**: API reference documentation

Troubleshooting

Authentication Issues

Error: AADSTS7000218 - The request body must contain the following parameter: 'client_assertion' or 'client_secret'

Solution: Enable "Allow public client flows" in your Azure AD app registration:

1. Go to Azure Portal → App registrations → Your app
2. Click Authentication
3. Set "Allow public client flows" to **Yes**
4. Click Save

Error: AADSTS650052 - The app needs access to a service that your organization has not subscribed to

Solution: Have your IT administrator grant admin consent:

1. Go to Azure Portal → App registrations → Your app
2. Click API permissions
3. Click "Grant admin consent for [Organization]"

Error: Token expired or invalid

Solution: Refresh your authentication:

1. Go to Settings

2. Click "Refresh Token" or "Sign Out" then sign in again

OpenAI Issues

Error: Invalid API key

Solution:

1. Verify your API key at platform.openai.com/api-keys

2. Ensure the key hasn't been revoked

3. Create a new key if necessary

Error: Rate limit exceeded

Solution:

- Wait a few minutes and try again

- Consider upgrading your OpenAI plan for higher rate limits

Error: Insufficient quota

Solution:

- Add funds to your OpenAI account at platform.openai.com/account/billing

---

Workflow Issues

Meeting not appearing in workflow

Solution:

1. Verify the meeting is set to `active: true` in config.yaml

2. Run `config validate` to check for errors

3. Check the Meetings page for the meeting status

Emails not being sent

Solution:

1. Verify Microsoft 365 authentication is connected (Settings → green "Connected" status)
2. Check that the from_address matches an email you have send-as permission for
3. Review workflow logs for specific errors: `workflow logs --level ERROR`

Transcript not available

Solution:

- Ensure the Teams meeting has recording and transcription enabled
- Wait 15-30 minutes after the meeting ends for transcript processing
- Verify the transcript language matches your config (`transcript_language: en-US`)

Database Issues

Error: Database is locked

Solution:

1. Close any other instances of the application
2. If using the CLI and UI simultaneously, ensure they're not conflicting

---

Error: Database not found

Solution:

1. Run `solostaff-secretary init` to create the database
2. Check that the database_path in config.yaml is valid

General Tips

1. **Check the logs first**: Most issues are explained in the workflow logs

2. **Validate configuration**: Run `config validate` after any config changes

3. **Restart the daemon**: Sometimes stopping and starting the scheduler resolves issues

4. **Check network connectivity**: Ensure you can reach Microsoft and OpenAI servers

---

Getting Help

Early Release Support

As an Early Release user, you have direct access to support:

- **Email**: stephenbogner@stephenbogner.com

- **GitHub Issues**: github.com/StephenBogner/sec-agent-pilot/issues

Reporting Issues

When reporting an issue, please include:

1. **What you were trying to do**

2. **What happened instead**

3. **Error messages** (copy/paste from Terminal or logs)

4. **Screenshots** (if applicable)

5. **Your operating system and version**

Providing Feedback

Your feedback is essential for improving SoloStaff Meeting Secretary:

- **Feature requests**: What would make the product more useful?

- **Usability issues**: What was confusing or difficult?

- **Documentation gaps**: What wasn't clear in this guide?

Appendix: Quick Reference

CLI Commands

Command	Description
`solostaff-secretary ui`	Launch the web interface
`solostaff-secretary run`	Start the automation daemon
`solostaff-secretary init`	Initialize configuration
`solostaff-secretary --version`	Show version
`solostaff-secretary auth login`	Authenticate with Microsoft 365
`solostaff-secretary auth status`	Check authentication status
`solostaff-secretary config validate`	Validate configuration
`solostaff-secretary workflow status`	Show workflow status
`solostaff-secretary workflow logs`	View recent logs

Default Paths

Item	Windows	macOS/Linux
Config Directory	`C:\Users\You\.solostaff-secretary\`	`~/.solostaff-secretary/`
Database	`...\secretary.db`	`~/.solostaff-secretary/secretary.db`
Token Cache	`...\tokens.cache`	`~/.solostaff-secretary/tokens.cache`
Logs	`...\logs\secretary.log`	`~/.solostaff-secretary/logs/secretary.log`

Keyboard Shortcuts (Terminal)

Shortcut	Action
`↑` / `↓`	Navigate command history
`Enter`	Execute command
`Ctrl+C`	Cancel current command

SoloStaff Meeting Secretary v0.7.0 Alpha

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