

# User Guide - Meeting to Action.

## Introduction



### Purpose of the App

After meetings, teams often struggle with turning unstructured notes into actionable tasks. Important details are buried inside Word docs, PDFs, or chat logs, and manual Jira issue creation is time-consuming.

**This Forge app solves the problem by:**

- Allowing upload or typing of meeting notes.
- Extracting and understanding the text.
- Automatically mapping items into Jira issues.
- Reducing manual effort while improving traceability.

### Target Audience

- **Project Managers** – want quick action items.
- **Scrum Masters** – need backlog items from sprint meetings.
- **Developers** – get clear tasks without retyping notes.
- **Business Teams** – sales/marketing teams can log follow-up items.

# Installation

## Requirements

- Jira Cloud (Data Center not yet supported).
- Admin permissions to install apps.
- Supported file formats: .txt, .docx.
- Modern browser (Chrome, Edge, Firefox).

## Steps to Install

- Log into your Jira Cloud instance.
- Navigate to **Apps → Explore more apps**.
- In the Atlassian Marketplace, search for:

### Meeting Minutes to Jira Issues

- Click **Install**.
- Review app permissions (must include: read projects, create issues, temporary storage).
- Approve and finish installation.

After install, the app will appear under:

**Apps → MoM Issue Creator**

# Configuration

## Users can:

- Define **default issue type mapping** (e.g., “Decision” → Story, “Action Item” → Task).
- Configure **priorities** (e.g., “urgent” = High).

## User Access

- Any licensed Jira user can access the app.
- Permissions depend on their ability to create issues in the chosen project.

# Using the App

## Opening the App

From Jira menu: **Apps** → **MoM Issue Creator**.

The main interface has 3 key elements:

- **Text area** – type or paste notes.
- **Upload file button** – for MoM files
- **Submit button** – process notes into issues.

# Entering Meeting Notes

## Manual Typing

- Click inside the **textarea**.
- Type or paste notes.
- Notes are **auto-saved every 0.5 seconds** after typing stops.
- You can leave and come back – your last draft is preserved.

## Upload File

- Click Upload MoM file.
- Select a .txt, .csv
- When a file is uploaded, its text is extracted and automatically displayed in the textarea.

## Submitting Notes

Click Submit.

The button shows “**Working...**”.

Behind the scenes:

- Your text is sent to the backend resolver.

- AI analyzes notes to detect **issues, tasks, bugs, decisions**.
- The app suggests **Jira issue types**.

## Issue Creation in Jira

Once confirmed:

- Issues are created in the mapped Jira project.
- Each issue includes:
  - **Summary** – short description from your notes.
- You'll see a Jira notification:
  - issues created successfully.

## Features in Depth

- **Dual Input** – text box + file upload.
- **File Parsing** – extracts plain text from .txt, .csv.
- **AI Classification** – smart mapping to issue types.
- **Flexible Mapping** – admin rules for issue creation.
- **Error Handling** – clear messages for missing input, unsupported file, or server errors.
- **Scalable** – can process single or multiple issues at once.

# Advanced Usage

## Multiple Issues in One Go

- If multiple action items are found, the app **splits them into separate Jira tasks**.

## Security

- Hosted fully inside Atlassian Forge → **no external servers**
- Temporary storage only for processing.
- Access limited to approved permissions.

## Glossary

- **MoM:** Minutes of Meeting.
- **Forge:** Atlassian's serverless app platform.
- **Issue Type:** Jira classification (Task, Story, Bug).
- **AI Matching:** Natural Language Processing to classify notes into tasks