BY FORGEPOINT

SUTRADHAR USER MANUAL

Sales meeting capture, Voice ID, TOC minutes of meeting and action tracking

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Online version: https://sutradhar.forgepoint.in/help/

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Sutradhar (सूत्रधार, "the one who holds the threads") records sales meetings, works out who said what (by **Voice ID**, or by Teams name for remote people), writes **minutes of meeting (MoM)** in the Theory of Constraints (TOC) format, and tracks every commitment as an **action item** until it is closed.

Open the app at **https://sutradhar.forgepoint.in** on a laptop or phone. You can add it to your phone's home screen like an app.

This manual is also in the app under **Help**, where you can search it or use ⇩ **Download PDF** to save a copy.

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GETTING STARTED

Sign in

1. Enter your work email and tap **Email me a code**.
2. Type the **6-digit code** from the email (sender: *Sutradhar <noreply@forgepoint.in>*). On a phone, typing the code is more reliable than tapping the link, because mail apps often open links in their own browser.
3. If the browser reloads while you fetch the code, you return to the code screen. Always use the **latest** code; older ones stop working.

After that, you stay signed in on that device, even offline.

Set up your profile (first time only)

Enter your **full name**, **organization**, **role** (search the list, or type a new role to add it), and optionally your **mobile**.

- A mobile number can belong to only one person.
- If you signed in with the wrong email, click **Not you, or wrong email? Sign out** on this screen.

The menu under your initials

Top right. It shows your name and email, the **Email reminders** switch, **Send me a test email**, and **Sign out**.

YOUR VOICE ID

A Voice ID is a voiceprint that lets Sutradhar credit what you say to you. Without one, you appear as an unknown speaker until the host names you.

Create it

Go to **Voice ID** in the top menu and follow the steps:

1. Read and accept the **biometric consent** (DPDP Act, 2023). Nothing is recorded without it.
2. **Clip 1**: hold the phone about 15 cm from your mouth and read the sentence shown.
3. **Clip 2**: put the phone on the table, as in a meeting, and read the second sentence.
4. Tap **Create my Voice ID**. If the two clips differ a lot (for example, in a noisy room), re-record somewhere quieter.

You can **Re-record my Voice ID** at any time. Your Voice ID improves slightly each time you are confidently recognized in a meeting.

Other ways to get one

- When you join a meeting by QR code, choose **Record two short clips now** or **Create it from my speech in this meeting**.
- If a host names you after a meeting, you receive a **consent link**. Your Voice ID is built from that meeting only if you agree.

RECORDING AN IN-PERSON MEETING

Works on a laptop or a phone, with or without internet.

1. Go to **Record** and choose **In-person**.
2. Optionally open **Meeting details**:
   - **Title**
   - **Host organization**: your side; it defaults to your profile's organization.
   - **Customer organization**
   - **Expected attendees**: people you have met in earlier meetings; you are ticked by default.
3. Optional: tap **+ Invite participants first** to get the QR code and join link before the meeting begins (see Before the meeting).
4. Tap **Start**. The timer turns red and a level meter shows the microphone is hearing the room.
5. Tap **Stop** when the meeting ends.

Tips for good results

- Put the phone or laptop **in the middle of the table**, within about 2 metres of everyone.
- On a phone, **keep the app open and the screen on**. Phone browsers may pause the microphone if you switch apps or lock the phone.
- The audio is saved on the device every 5 seconds, so a crash or flat battery loses at most a few seconds.

Offline

Recording works without internet. The recording stays on the device and **uploads automatically** when you are back online. The badge in the top bar shows **Online / Offline** and how many recordings are waiting to upload.

Do not sign out while recordings are still waiting; the app warns you if you try.

ADDING PARTICIPANTS SO THEY ARE RECOGNIZED

You don't have to add anyone before you start: **Expected attendees** only lists people you have met in earlier meetings, and new people can join at any point until you tap **Stop**. Inviting early just gives people time to set up their Voice ID.

Before the meeting (needs internet)

1. On **Record**, fill in the meeting details, then tap **+ Invite participants first**.
2. The **Invite** card appears with the **QR code and join link**, and lets you add people by mobile or email. People can join and create their Voice ID straight away.
3. When the meeting begins, tap **Start**. The recording belongs to the same meeting, so everyone who already joined is included.

The set-up meeting is remembered on that device (and shows as **scheduled** on **Home**), so you can close the page and come back. To drop it, tap **Cancel this meeting** under the Start button.

During the meeting (needs internet)

After you tap Start, an **Invite** card appears with a **QR code and join link**.

- Each attendee scans the QR with their phone camera, signs in with an email code, and chooses:
  - **Record two short clips now** (about 30 seconds, most accurate)
  - **Create it from my speech in this meeting** (no recording now)
  - **Just join, no Voice ID**

  People who already have a Voice ID are simply matched.
- You can also add people **by mobile or email** in the Invite card. It opens your own WhatsApp or email app with the join link ready to send.
- The **Participants** list shows who has joined.

Anyone who joins at any time before you tap **Stop** is included. Voice matching happens after the upload, not live.

After the meeting

Unknown voices appear under **Speakers** on the meeting page. See Reviewing a meeting.

HYBRID MEETINGS (ROOM + TEAMS)

Use this when some people are in the room and some are on Microsoft Teams.

1. Run the Teams call on the room laptop **with its speakers on** (not headphones), and turn on **Teams transcription**.
2. In Sutradhar, go to **Record → Hybrid (room + Teams)** and tap **Start**. Recording and QR joining work exactly as for an in-person meeting.
3. After the call, download the Teams **transcript (.vtt)** from the meeting chat or Recap. Optionally, also download the **attendance report (.csv)** (Teams → Attendance → Download); its emails make name matching exact.
4. Open the meeting in Sutradhar and, in the **Microsoft Teams** card, upload the file(s) and tap **Merge with Teams**.

You can also add a Teams transcript to an in-person meeting afterwards.

What the merge does

- It lines up the room recording with the Teams transcript. The card says how, for example "Teams is 47 s ahead of the room recording", and warns if confidence is low.
- It finds the **room's own Teams account**: the one name that carries several room voices. That name is marked **In the room**, and its lines are identified by Voice ID instead.
- **Remote people** are named from Teams, with Teams' text of what they said. Copies of their voices coming through the room loudspeaker are removed.
- If a name is placed wrongly, change **Remote / In the room** in the card. **auto** restores the automatic choice. Then use **Regenerate** on the MoM.

How Teams names are matched to people

Evidence is tried strongest first:

1. **Learned earlier**: you confirmed this exact Teams name before.
2. **Attendance email**: from the attendance report.
3. **Exact name**: after removing extras such as "(Guest)", "| Acme" and "Mehta, Rahul".
4. **Similar name**, such as "Srini V" or "R Mehta". This is only **provisional**; please confirm it.
5. **Name + voice**: in a hybrid meeting, the remote voice heard in the room agrees with the name.

When you confirm a Teams speaker under **Speakers**, Sutradhar remembers that name, so you only confirm each person once.

IMPORTING A TEAMS MEETING (EVERYONE REMOTE)

1. In Teams, record the meeting with **transcription** on.
2. Go to **Record** → **Import MS Teams**, add the meeting details, and upload the **transcript (.vtt)**, optionally with the **attendance report (.csv)**. Upload the **recording (.mp4)** only if transcription was off; it then runs full voice identification.
3. Review the meeting as below. Remote speakers never get a Voice ID from Teams audio.

REVIEWING A MEETING

Open the meeting from **Home**. Processing takes a few minutes after the upload, and the page refreshes by itself.

Header

The title, **Host organization ↔ Customer organization**, and the date. The host can click **Edit details** to change the title or either organization, even after the meeting. Regenerate the MoM afterwards if you want it to use the new names.

Audio player

Every ▶ **00:42** time badge in the MoM plays the audio proof from that moment.

Speakers

Each detected speaker shows a match level:

- **verified**: a strong Voice ID match, or a confirmed Teams name.
- **provisional**: a likely match. Please confirm it.
- **unregistered**: unknown.

To confirm or correct a speaker, click **Change**, then pick a person, **+ New person…** (name plus mobile or email), or leave them as a guest. Then click **Confirm**.

If you name someone who has no Voice ID, you get a **consent link** to send by WhatsApp or email. Their Voice ID is built from this meeting only if they agree. People who already agreed when joining are enrolled automatically.

After fixing speakers, click **Regenerate** so the MoM uses the right owners.

Minutes of meeting (TOC format)

- **System goal & scope**, and **attendees**.
- **Undesirable effects (UDEs)**: the problems raised, who raised them, and when.
- **Suspected core constraint**: the bottleneck that best explains the UDEs.
- **Evaporating cloud**: the underlying conflict, when there was enough discussion to map it.
- **Proposed injections**: changes proposed in the meeting.
- **Action items**: each commitment, with the **exact words** spoken (in Hinglish where spoken), owner, due date ("Friday tak" becomes a date), and a time badge.
- **Open questions & next checkpoint**: anything ambiguous is listed here instead of guessed.

The host can change an action item's **owner** and **due date** before approving. **"No verified owner: reminders won't be sent"** means the owner is not linked to a person yet; pick them from the list.

Approve

The host clicks **Approve MoM**. Its action items then go to the action tracker. **Print / PDF** saves a copy.

ACTION ITEMS (TRACKER)

Go to **Actions** for everything you can see, or open a meeting to see only its items. The table follows the ForgePoint issue-tracker template. All data is stored in Sutradhar.

Columns

Column	Meaning
Engagement	The meeting the item came from, or *Internal*
Industry	The customer organization
Task	What has to be done
BP	**Buffer penetration**: working days used ÷ working days allowed, from Created to Due
Created	Start date (the meeting date for items from a MoM)
Assigned to	The owner
Status	NOT STARTED, IN-PROGRESS, COMPLETED, MONITOR, CLOSED, POSTPONE, CANCELLED, DUPLICATE
Priority	0 - Critical … 3 - Low
Due date	Current commitment. Each change is logged; click the history marker to see all changes
First due	The original commitment, captured at the first change
Delay	Working days between first due and current due
Remarks	Latest dated remark. **+ New** starts a new one, and the old one becomes history
Blocks	Whether this item blocks others

BP colors

Color	Zone	Meaning
Cyan	Not started	Created date is in the future
Green	On track	Below 30% of the time used
Yellow	Watch	30–67% used
Red	At risk	67–100% used
Black	Overdue	Past the due date
Grey	No dates set	Created or due date missing

Completed, monitored, closed, postponed, cancelled and duplicate items show no BP.

Using the table

- Click a column header to sort: ascending, then descending, then off. Blank values always sort last.
- Use the filter row under the headers. **Status** lets you tick several values at once.
- ⇩ **Excel** exports exactly what you see (current filters and sort).
- ⛶ **Maximise** gives the table the full screen.
- ＋ **Add item** adds an **Internal** item (on the Actions page) or an item on a meeting you host (on that meeting's page).

Who can change what

- **Meeting host**, or the creator of an Internal item: everything.
- **Owner**: status, due date, remarks and blocks.
- **Everyone else who can see the meeting**: view only.

REMINDERS

Reminder emails come from *Sutradhar <noreply@forgepoint.in>*. You get them only for items where you are the **verified owner**.

- **New action item**: sent as soon as someone else makes you the owner. It includes the task, due date, BP and the words you said.
- **Daily digest**: sent on working days from 9:00 IST, and only when something needs attention:
  - **overdue** items, with working days late
  - items **due today**
  - items **due in the next 2 working days**
  - items **running out of buffer** (BP of 67% or more)
- **Monday, for hosts**: open items from your meetings that have **no verified owner**, so you can assign them.

Turn reminders on or off with the **Email reminders** switch in the menu under your initials, or with the **Stop reminder emails** link in any reminder. **Send me a test email** checks that delivery works.

JOINING SOMEONE ELSE'S MEETING

1. Scan the host's QR code, or open the link they sent.
2. Sign in with an email code. If you are new, fill in your name and organization.
3. Choose how you want to be recognized (see During the meeting) and give consent if you are creating a Voice ID.
4. That's it. You can put your phone away.

You can see the meetings you were invited to, and their MoM, on **Home**. You can update the action items you own in **Actions**.

PRIVACY AND CONSENT

- A Voice ID is created **only with your explicit consent** (DPDP Act, 2023). This applies whether you register, join a meeting, or follow a host's consent link. Declining is fine: hosts can still credit you by name.
- People named by a host without consent are **credited by name only**. No voiceprint is created.
- Remote Teams participants never get a Voice ID from Teams audio.
- You see only meetings you **hosted, joined, or were invited to**, plus action items you own or created.
- Meeting recordings, transcripts, MoMs and action items are stored in Sutradhar's own database (Supabase) and server.

TROUBLESHOOTING

Problem	What to do
No code in the email	Check spam. Make sure you typed your email correctly. Codes can take a minute to arrive.
"Too many codes requested"	Use the most recent code if you have one. Otherwise wait a few minutes and try again.
Signed in with the wrong email	On the profile screen, click **Not you, or wrong email? Sign out**.
"That mobile number is already linked to someone else"	The number belongs to another profile, often your own under a different email. Sign in with that email instead.
Recording stopped on my phone	Keep the app on screen with the screen on. What was recorded until then is safe on the device.
The recording didn't upload	Check the top bar: "… to upload" means it is waiting. Open the app while online, and it uploads automatically.
A speaker is wrong or unknown	Fix it under **Speakers**, then **Regenerate** the MoM.
No QR code during recording	The device was offline when you pressed Start. Identify people after the meeting under **Speakers**.
The MoM didn't generate	Click **Generate MoM** (or **Regenerate**) on the meeting page.
No reminder emails	Check the **Email reminders** switch, and make sure you are the **verified owner** of the items. Use **Send me a test email** to check delivery.