

Downloading the PDF Packet (Board Packet)

Whether downloading as part of a recommended local archive, or simply to review the meeting materials offline, BoardBook makes it easy to download your meeting materials. Using the steps described below you'll be able to download a PDF packet, hereafter referred to as the Board Packet, containing your agenda and attachments. We strongly recommend always downloading and storing a copy of your Board Packet for each meeting.

NOTE: Only attachments eligible for download will be available to be included in the packet.

In this document we will cover the following subjects:

- Creating the Board Packet
- Configuring the Board Packet
- Downloading the Board Packet
- Navigating the Board Packet

Creating the Board Packet

The Board Packet is downloaded from the Agenda Report screen. There are two different ways to get to this screen.

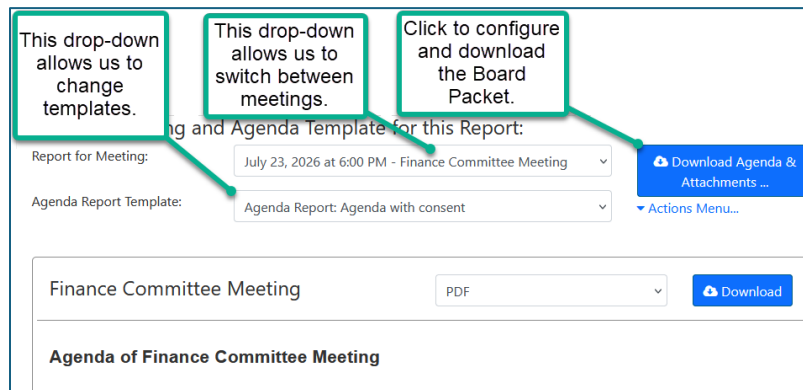
On the Home Screen, we can click the meeting's Date, Time, Title link and choose 'Agenda Report' from the resulting menu. Below are examples of the Date, Time, Title, and Agenda Report links:

July 10, 2026 at 7:30 PM - Regular Meeting

 [Agenda Report](#)

The Agenda Report page can also be reached from the Meetings, Minutes, and Agendas screen by looking in the right-hand column for the meeting.

Once you reach the agenda report screen you will see a layout similar to that shown below:



The screenshot shows the 'Agenda and Agenda Template for this Report' section. It includes two drop-down menus: 'Report for Meeting:' (set to 'July 23, 2026 at 6:00 PM - Finance Committee Meeting') and 'Agenda Report Template:' (set to 'Agenda Report: Agenda with consent'). A large blue button labeled 'Download Agenda & Attachments ...' is on the right. Below these is a section for 'Finance Committee Meeting' with a 'PDF' drop-down and a 'Download' button. The main content area displays 'Agenda of Finance Committee Meeting'.

Callouts in the image:

- 'This drop-down allows us to change templates.' points to the 'Agenda Report Template:' dropdown.
- 'This drop-down allows us to switch between meetings.' points to the 'Report for Meeting:' dropdown.
- 'Click to configure and download the Board Packet.' points to the 'Download Agenda & Attachments ...' button.

In most cases, for most users, we will simply click the big blue Download Agenda & Attachments button.

Configuring the Board Packet

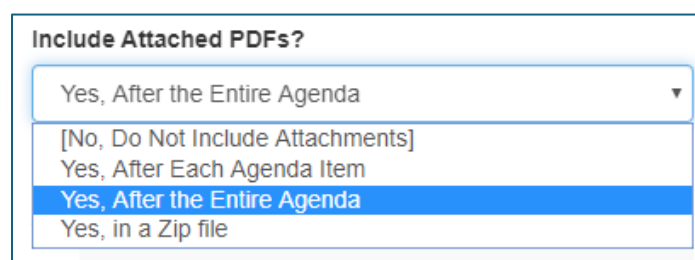
Having clicked the blue 'Download Agenda & Attachments' button, we will see a sidebar where we can configure the packet. We will be covering three options, picking a different template, choosing how attachments are included in the packet, and how to exclude attachments if desired.

Picking a different template

Generally, the desired template should already be chosen for the packet, however if you wish to use a different template, there is a drop-down menu labeled Template where this choice can be made.

Choose how attachments are included in the packet

The 'Include Attached PDF's' drop down will allow you to choose from four different options concerning how the attachments are included and arranged. Each option is described below the screenshot:



The screenshot shows a dropdown menu titled 'Include Attached PDFs?'. The menu is open, displaying five options: 'Yes, After the Entire Agenda' (selected), '[No, Do Not Include Attachments]', 'Yes, After Each Agenda Item', 'Yes, After the Entire Agenda', and 'Yes, in a Zip file'.

No Do Not Include Attachments – This will simply create and download the Agenda Report.

Yes, After Each Agenda Item – Similar to the meeting ‘quick view’ this will list the agenda down until the first item with an attachment. Any attachment or attachments for that item will be displayed and then the agenda will continue with the next agenda item continuing in this fashion, breaking for each attachment.

Yes, After the Entire Agenda – This will display the complete agenda followed by the attachments in the order they are placed in the meeting.

Yes, in a Zip file – This downloads a single zip file containing individual PDFs of the agenda and the attachments.

Excluding attachments

Below the ‘Include Attached PDFs’ option, is a list of each agenda item which contains at least one attachment. For each item, the attachments are listed. Each attachment has a check box. If you wish your downloaded packet to exclude certain attachments, they can simply be unchecked.

Downloading the Board Packet

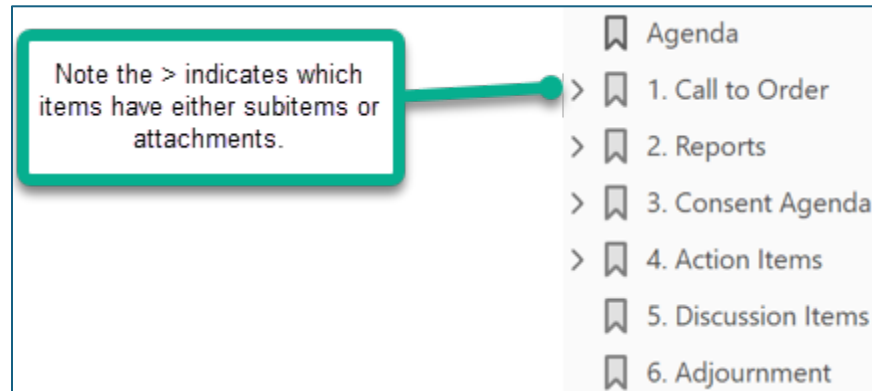
When you are ready click the blue Download button to download the packet. Note that the size and number of attachments can impact how long it may take for the system to prepare the packet and start the download.

Navigating the Board Packet

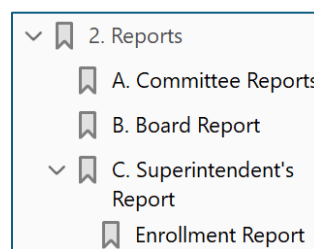
Let’s have a quick look at the created packet. For this example, we will be looking at a packet created using the ‘Yes, After the Entire Agenda’ option where the attachments follow the complete agenda.

NOTE: While there are dozens of PDF readers available, for consistency all screenshots are shown using a downloaded packet opened with Adobe Acrobat Reader DC. Other PDF readers may display or use bookmarks differently or may not display or use them at all.

In our downloaded PDF we will have bookmarks available for each agenda item. Clicking on an Agenda Item bookmark will place that agenda item at the top of the screen. Notice in the screenshot below that items with either subitems or attachments are shown with a > next to the bookmark.



In the example below I have clicked on > next to item 2. Reports and you can now see the subitems under that item. I've then clicked on the subitem C. Superintendent's Report, and we can see the attachment 'Enrollment Report'. Clicking on the 'Enrollment Report' attachment would navigate to that page in the PDF packet.



In this manner, a bookmark may be used to navigate to any item or attachment.