

## Change how Your Agenda Items Number

In your agenda, the items at different levels, top level, subitem, subitem of subitem etc., can be numbered following different patterns. When your organization's account was first set up, this order was set by looking at a sample agenda, typically from your website. If a sample agenda wasn't available, the default pattern was used. If your organization would like your agenda items to be numbered differently this can be changed in settings. This document may refer to videos or handouts on related subjects. These can be found on our support page. The support page can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Administration and Meeting Management Help'.

In this document we will cover the following subjects:

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## Agenda item numbering

How agenda items are numbered basically covers three different things:

First, what number, letter or symbol is used at each level in the agenda. For example in the sample below, three levels of numbering are seen. An Arabic number has been used for the top level item with an alphabet letter used for the two subitems. The second subitem has a subitem of its own which is numbered using a lower case roman number:

- 6. Reports
  - A. Board Reports
  - B. Committee Reports
    - i. Finance Committee

The available options at each level are

Arabic Numerals (1,2,3)

Roman Numbers (upper case I,II)

Roman Numbers (lower case I,ii)

Alphabet upper case

Alphabet lower case

You can specify your choices for up to nine levels deep.

Second, you can select what punctuation, if any, should follow the item number.

The available options, which can be set differently at each level if desired, are:

Period After

Parenthesis After

Parenthesis Before & After

None.

While the first and second options are controlled in settings, a third option, which only impacts downloaded reports can be configured in the individual settings for your report templates.

Third, a template setting controls how agenda item numbers display on the downloaded reports. The options are:

Options are shown based on the numbering seen in the earlier example, each with an example:

Show this agenda item's number only i. Finance Committee

Show this agenda item's number preceded by its parent's item numbers 6.B.i. Finance Committee

Do not show any agenda item number Finance Committee

## What options are available

As specified above there are essentially three categories of settings:

Agenda Item Numbering. What number, letter or symbol will be used at each level and what punctuation, if any will be included. Note that while you can specify numbering for up to nine levels of agenda items it is fairly common to only specify four or five unique levels then simply repeat either the last two or three levels.

The available numbering options at each level are

- Arabic Numerals (1,2,3)
- Roman Numbers (upper case I,II)
- Roman Numbers (lower case I,ii)
- Alphabet upper case
- Alphabet lower case

The available punctuation options, which can be set differently at each level if desired, are:

- Period After
- Parenthesis After
- Parenthesis Before & After
- None.

Note that the third option is a report template setting.

The report template report numbering format options are:

- |  |                          |
|--|--------------------------|
| Show this agenda item's number only                                  | i. Finance Committee     |
| Show this agenda item's number preceded by its parent's item numbers | 6.B.i. Finance Committee |
| Do not show any agenda item number                                   | Finance Committee        |

## Making a change

Note: ***Changing system settings incorrectly can cause issues which may be very difficult to recover from, should you choose to revert them at some point in the future. It is best to use caution, and not to assume the function of unfamiliar settings based off of their names. Please only change or update settings as specifically described in these instructions to ensure the best outcomes.*** Please remember that you always have the option to ask us to make the changes for you.

The user permission Settings Manager is required to make any changes in settings. To check for this permission, look at options in the gray menu bar, if you have settings listed you have this permission.

In the gray menu bar select 'Settings' and then 'Action Options'

From 'Action Options' you will scroll UP approximately 5 pages to a section titled 'Specify the Number Format for Agenda Items:'.

This will show nine layers, representing the top level items and then eight additional layers of subitems. Each layer has drop downs where the numbering and punctuation can be selected.

Make your selection and save.

To set the report template report numbering format option you will need to update the settings on the individual report template. For more information see the Working with Report Templates handout on our support page.

## Requesting a change

Instead of making the change yourself, you can contact our support team and ask us to make the change for you. Below is the information we will need:

Before requesting any change, please ensure you fully understand both the capability described and the options which are available.

Overall, what do you want to change? Please refer to the subject of this handout.

Specify the desired numbering option and punctuation option for each of nine layers based on the options below:

The available numbering options at each level are

- Arabic Numerals (1,2,3)
- Roman Numbers (upper case I,II)
- Roman Numbers (lower case I,ii)
- Alphabet upper case
- Alphabet lower case

The available punctuation options, which can be set differently at each level if desired, are:

- Period After
- Parenthesis After
- Parenthesis Before & After
- None.

Typically, these might be specified somewhat simply in either of the manners below:

1. A. i. 1. i. 1. i. 1. i.

Or

1.  
A.  
i.  
1.  
i.  
1.  
i.  
1.  
i.

To set the report template report numbering format option you will need to update the settings on the individual report template. For more information see the Working with Report Templates handout on our support page.