

BoardBook Premier – Working with Custom Documents Custom Agenda, Custom Public Notice, Custom Minutes

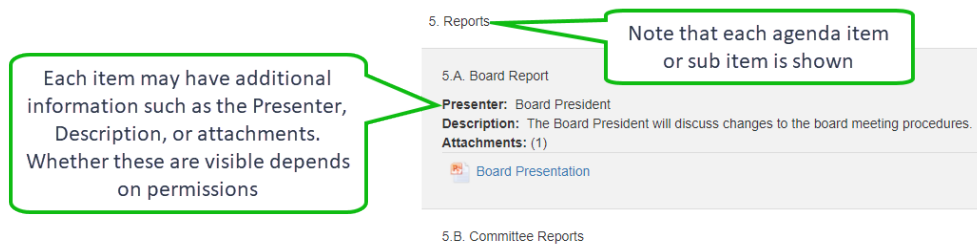
In BoardBook® Premier, the display of the agenda, public notice, and minutes to the public can be managed by the program. In some cases, this is likely what we want to happen, in others we may want to override what the program does and display what we refer to as a ‘Custom’ document. These come in the form of ‘Custom Agenda’, ‘Custom Public Notice’, and ‘Custom Minutes’.

This document will explain how to use such documents, why they might or might not be desired. Throughout this document these will simply be referred to as custom documents unless the information is relevant to a specific instance such as the agenda or minutes.

What is a custom document?

Literally a custom document is one that an agenda, or minutes manager uploads as a specific document for a meeting (the agenda, public notice, or minutes).

The BoardBook program can populate agenda, public notice, and minutes information automatically using the ‘Quick View’. Quick View is, by default, how the public agenda for most organizations is displayed. When a member of the public clicks on the agenda for a meeting they typically see a list of the agenda items and sub items as well as any additional information that is configured and permissioned for the public. This might include information from ‘presenter’, ‘description’, ‘rational’ and or other fields, and or one or more attachments. Below is an example of what the Quick View might look like:

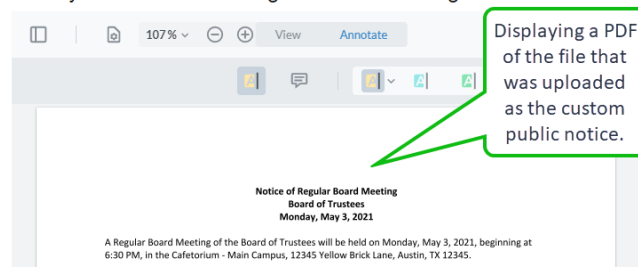


The screenshot shows a list of agenda items. The first item is "5. Reports". A callout box points to it with the text: "Note that each agenda item or sub item is shown". Below "5. Reports" is "5.A. Board Report". A callout box points to this item with the text: "Each item may have additional information such as the Presenter, Description, or attachments. Whether these are visible depends on permissions". The details for "5.A. Board Report" are: "Presenter: Board President", "Description: The Board President will discuss changes to the board meeting procedures.", "Attachments: (1)", and a link for "Board Presentation". Below this is "5.B. Committee Reports".

If a custom document is used instead, a PDF of the uploaded document will be seen. See the example below of a custom public notice:

May 3, 2021 at 6:30 PM - Regular Board Meeting Version 1

County School District - Regular Board Meeting



The screenshot shows a PDF viewer displaying a document. A callout box points to the document with the text: "Displaying a PDF of the file that was uploaded as the custom public notice." The document content includes: "Notice of Regular Board Meeting", "Board of Trustees", "Monday, May 3, 2021", and "A Regular Board Meeting of the Board of Trustees will be held on Monday, May 3, 2021, beginning at 6:30 PM, in the Cafetorium - Main Campus, 12345 Yellow Brick Lane, Austin, TX 12345."

Note that custom documents are uploaded and managed in a specific way and are not the same as attachments or Tier 2's 'online documents'

Limitations of Custom Documents:

When comparing using a Custom Document verses the Quick View there are a couple of limitations that it's important to understand:

Custom Documents are static: Once uploaded, a Custom Document is not impacted by any changes you may make to a meeting. If the date, location, or an agenda item is changed, or even if just a spelling mistake is corrected this change will not be seen unless the existing Custom Document is removed and replaced with an updated copy. Any of these same changes would be automatically made in the Quick View.

Custom Documents limit how the public can access attachments: With the Quick View a member of the public can choose to look at or perhaps download any attachment that had the appropriate permissions. When using a Custom Document, you can still specify that attachments available to the public can be downloaded, however they can only be downloaded as a PDF packet containing ALL of the public downloadable attachments. There is no option for a member of the public to pick a choose which attachments to be viewed or download.

Common Use:

With these limitations in mind, what we see with most of our public organizations make different choices for different documents:

Agendas are typically displayed as Quick View as to take advantage of the flexibility of that format.

Public Notices, if they are used, are typically displayed as Custom Documents. This has the added benefit of allowing the displayed Public Notice to be scanned in with signatures, and or to have organization logos or other graphics which are not practical with the 'Quick View'.

Minutes are almost always displayed as Custom Documents. As with Public Notices this allows them to be scanned in with signatures, and or to have organization logos or other graphics which are not practical with the 'Quick View'.

Creating Your Custom Document:

Your Custom Documents can be created in any way you'd like, again they are simply documents that an agenda, or minutes manager uploads as a custom document. The most common way to create these documents is using the Report features in BoardBook Premier, creating and then downloading the Agenda Report, Public Notice Report, and or Minutes Report. Note that each of these reports has a variety of options available when downloading (Two different Word options, a text option, HTML or PDF). Once the file has been downloaded in can simply be uploaded as the custom document, or edited and saved, or printed, signed, and then scanned in.

Uploading Your Custom Document:

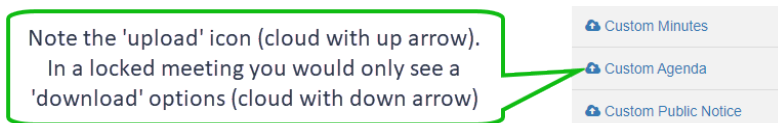
Whatever method you used to create your custom document you'll need to know two things prior to uploading:

Where is the file located: When adding a custom document you'll need to tell the program where to find the file. Common locations include your Documents, Desktop, or Downloads.

What is the file called: When adding a custom document you'll need to pick it out of the list of other files at the same location.

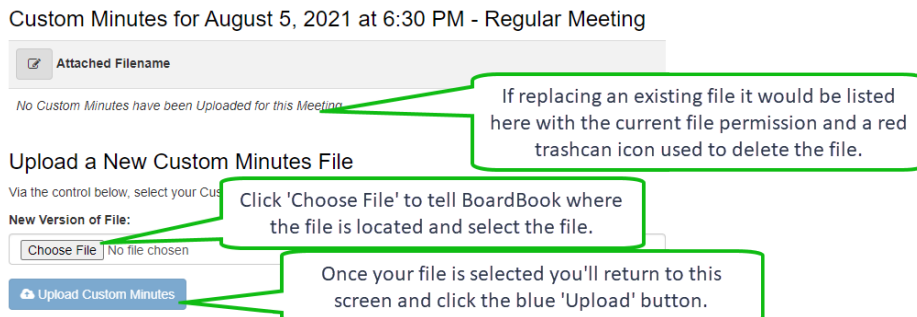
Here are the steps for uploading a custom document:

First click on the 'meeting date, time, title' link. If the meeting is locked, unlock the meeting. From the list of options choose on the appropriate 'Custom' choice.

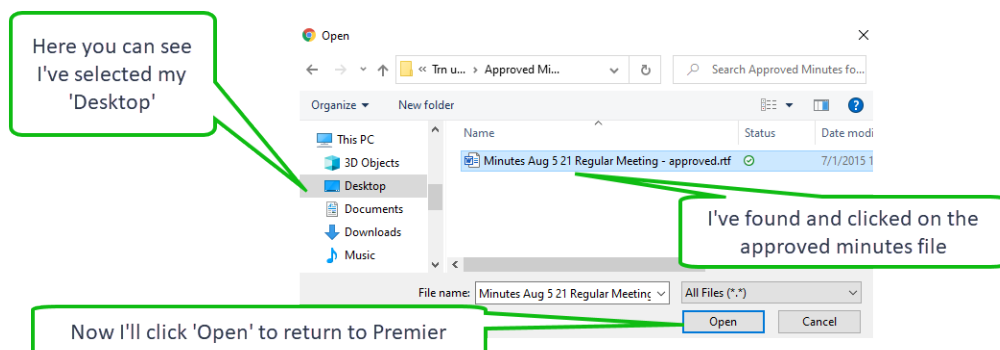


In this example I'll show uploading a saved copy of my approved meeting minutes as the Custom Minutes.

I've clicked on the 'meeting date, time, title' link and chosen **Custom Minutes** (upload Custom Minutes). This is the screen I'll see at this point:



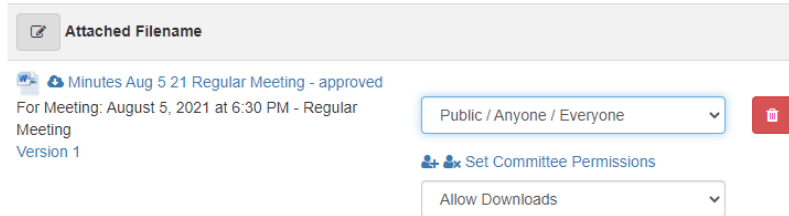
Here's what using the 'Choose File' button looks like. Note this process uses your computer's file browser so it will look different on a Macintosh computer or a PC computer running a different version of Windows.



Now that I've selected and 'opened' the file this is what I'll see:



You'll now see the uploaded file listed with all the same permission, download, and delete options you're familiar with from working with attachments.



Note that uploading a custom document does not change the meeting status. For example, once I've uploaded my 'Custom Minutes' (approved minutes) I will still need to update the meeting status to 'Completed' in order for those 'Custom Minutes' to be available to my users and public.