

Quick tips – Working with Agenda Items

Quick tips are intended as list of very minimal how-to information covering a specific area, in this case working with Agenda Items. For more detailed instructions please see the subject training videos.

Subjects Covered:

- How to Import Agenda Items
- How to Copy Items to Another Meeting
- How to Move Items Using Positioning Information
- How to Move Items Using Drag and Drop
- How to Delete or Deactivate Items
- How to Add a New Item or Sub-Item
- How to Edit an Existing Item or Sub-Item
- How to Add an Attachment

The starting point for all instructions is the ‘Manage Agenda: Meeting’ screen, also referred to as the ‘Edit Agenda’ screen

How to Import Agenda Items

To the right of the blue ‘Create Meeting Agenda Item’ button, click on the gray ‘Import Agenda Item(s) button. You can use the ‘Parent Agenda Item’ and ‘Before Agenda Item’ to position your imported items in your current meeting.

NOTE: If you skip positioning all items and sub-items will be added to the bottom of your agenda.

Use the ‘From Agenda’ drop down to pick the meeting you want to import from.

NOTE: This will produce a list of the items and sub-items from you selected meeting

Check any item(s) and or sub-item(s) you want to import

Select the Agenda Items Sections (fields such as description or information like attachments), checked items will be imported along with the agenda items they are associated with.

Click ‘Import Agenda Item(s)’

How to Copy Items to Another Meeting

NOTE: You can only copy items to an active (unlocked) meeting, or a meeting template

In your Agenda Item List, check any item(s) and or sub-item(s) you want to copy

Click on the ‘Copy’ action button, located above your list of agenda items

Use the ‘For Agenda’ drop down to pick the meeting you want to copy items to.

You can use the ‘Parent Agenda Item’ and ‘Before Agenda Item’ to position your imported items in your current meeting.

NOTE: If you skip positioning all items and sub-items will be added to the bottom of the agenda.

Select the Agenda Items Sections (fields such as description or information like attachments), checked items will be imported along with the agenda items they are associated with.

Use the ‘What do you want to do next?’ drop down to choose to either stay working on your current agenda, switch to working on the agenda you copied items to.

Click ‘Import Agenda Item(s)’

How to Move Items Using Positioning Information

Items or sub-items can be positioned either when created or after the fact. For moving items during creation skip to line three of these instructions.

To move an item or sub-item that already exists, click on the item to edit it.

In the right-hand column, you'll use the two drop downs

The first drop down 'Parent Agenda Item' is used to identify if your item should be a sub-item of some other item, or a top-level item. Use the drop down to either select the item which should be the parent item of the item you're working on, or at the bottom of the list of items pick 'None (this is a top-level Agenda Item)

The second drop down 'Before Agenda Item' is used to position your item among other items at the same level (either all top-level, or all the other items under the same parent item). Pick the item you want your item to appear before.

How to Move Items Using Drag and Drop

Above your agenda item list, and on the right side of the screen click on the blue 'Re-order Agenda Items' button.

This will take you to a new screen featuring two buttons at the top, green for save, red for cancel, and a list of your agenda items. Note, any items with sub-items will be collapsed, click on the arrow next to the item to expand and show sub-items.

You will move items using drag and drop. The two drag and drop actions you can use are:

Drop in – Click on the item you want to move, drag so that your mouse pointer is on the item you want to make your dragged item a sub-item of. (place your pointer as if you were going to click on the item) The item will now display in a shaded box. Drop your item and it will be dropped as a sub-item.

Drop below – Click on the item you want to move, it may be helpful to drag the item a bit to the right. As you move the item up or down in the agenda, you'll notice an arrow or spear appearing to the left of your agenda items. Dragging up or down you can move this 'spear' where you want your dragged item to appear. Drop the item in place.

Save or Cancel If everything ended up where you wanted, click the green Save button. If not, you can retry, or click the red Cancel button.

NOTE: Because of the amount of movement and visual clues involved with drag and drop viewing the full video 'Rearranging items in the meeting' from our support page may be more helpful.

How to Delete or Deactivate Items

NOTE: Deleted items CANNOT be recovered, if there is any chance you may need an item again, we recommend deactivating instead of deleting.

Check any item(s) and or sub-item(s) you want to delete, or deactivate,

Click on the 'Delete', or 'Deactivate' action button, located above your list of agenda items.

Your item(s) and or sub-item(s) will be deleted or deactivated based on which button you chose.

Note: If you need to recover a deactivated item, it can be reactivated into the same meeting. To do so, click on the 'Inactive' agenda item list, check any item(s) and or sub-item(s) you want to reactivate and click the 'Re-activate' action button, located above the list of inactive items.

How to Add a New Item or Sub-Item

Click on the blue 'Create Meeting Agenda Item' button located above the list of agenda items.

The left-side column contains information about the agenda item, including the subject, which is required, and other information fields as well as attachments. Add this information as desired

The right-side column contains the positioning information, used for identifying where in your agenda this item should appear once created. You'll use the two drop downs to set this information.

The first drop down 'Parent Agenda Item' is used to identify if your item should be a sub-item of some other item, or a top-level item. Use the drop down to either select the item which should be the parent item of the item you're working on, or at the bottom of the list of items pick 'None (this is a top-level Agenda Item)

The second drop down 'Before Agenda Item' is used to position your item among other items at the same level (either all top-level, or all the other items under the same parent item). Pick the item you want your item to appear before.

How to Edit an Existing Item or Sub-Item

In the list of your agenda items click directly on the title of the item or sub-item you wish to edit.

The left-side column contains information about the agenda item, including the subject, which is required, and other information fields as well as attachments. Update this information as desired

The right-side column contains the positioning information, used for identifying where in your agenda this item should appear once created. You'll use the two drop downs to update this information if desired.

The first drop down 'Parent Agenda Item' is used to identify if your item should be a sub-item of some other item, or a top-level item. Use the drop down to either select the item which should be the parent item of the item you're working on, or at the bottom of the list of items pick 'None (this is a top-level Agenda Item)

The second drop down 'Before Agenda Item' is used to position your item among other items at the same level (either all top-level, or all the other items under the same parent item). Pick the item you want your item to appear before.

How to Add an Attachment

Attachments can be added to an item or sub-item either during item creation or by editing the item.

Once you're on the 'Create Agenda Item', or 'Edit Agenda Item' screen, look in the left-hand column.

Scroll down until you find the 'Attachments' section

Attachments can be added on one of two ways:

Click the 'Click to Open the File Browser' button and using your computers file browser to find and select the attachment or attachments.

Drag the attachment or attachments into the gray 'Drag & Drop New Attachments Here' space.

Once added, your attachments can be renamed, the permissions can be changed, or they can be deleted.

Note: For more attachment options watch the 'Adding, deleting, and updating attachments' video on our support page.