BoardBook® Premier

Understanding Template Types

BoardBook Premier utilizes two different types of templates (meeting templates and report templates) to give our users maximum control in the customization of their meeting materials. To maximize efficiency within the BoardBook Premier program it is absolutely critical that users understand the differences between the two types of templates.

Meeting Templates control meeting settings (e.g. date, location, time, etc.) and content (e.g. agenda topics, order, attachments, etc.) for a meeting. Meeting templates do *not* control how a downloaded or printed agenda will look. Meeting templates let a user easily replicate similar meetings without constructing them from scratch. Note: Once a Meeting Template has been applied to a meeting it cannot be changed; likewise, modifying a Meeting Template will not affect meetings that have already been created with that template.

Report Templates control how downloaded or printed documents will look. This includes things like logos, letterhead, font, etc. Report templates do *not* control any meeting specific information – *anything specific to an individual meeting should be altered within an individual meeting, not at the template level*. To maintain consistency and minimize confusion keep your templates to an absolute minimum.

You may also refer to the video tutorial for this topic: https://player.vimeo.com/video/454489098

Understanding How Templates and Meetings Interact

The Meeting Template is purely structural in function. It dictates things like the when, where, and what of a meeting. The Agenda Report Template is purely aesthetic in function. It dictates what a downloaded or printed agenda will look like. It may help to think of the Meeting Template as the skeleton of your meeting and the Agenda Report Template as the skin.

When you create a new meeting in BoardBook Premier, the Meeting Template will automatically set up the logistics (title, time, location, etc.) of the meeting as well as some of the basic topics that will be included. *At this point in the process, the Agenda Report template is not important.*

Once you have gone through the process of adding your meeting topics and attachments, you are ready to make use of the Agenda Report Template. This template will *only* adjust how your meeting materials are organized and customize how they will appear.

An Agenda Report template contains both static and dynamic text. Static text stays the exact same, every time, such as the size and placement of your organization's name or logo. Dynamic text is inserted from meeting's information (e.g. the title, time, or location of your meeting). The Note and Reason fields are two incredibly useful dynamic text fields. Use the Note or Reason field to include specific text, legal language, or announcements needed for a specific meeting. Using the dynamic fields correctly will alleviate the need to create and maintain multiple Agenda Report templates.

Meeting Templates

From the gray navigation bar click 'Meetings' and select 'Templates.' Clicking on a Meeting Template's title will allow you to update an existing template and clicking the blue 'Create New Meeting Template' button will allow you to build a new one.

Meeting Settings: In either case, the next page will allow you to control the basic settings for a meeting. Here you can control a meeting's usual date, time, location, et cetera; as well as settings that control public display, which Agenda Report Template is applied by default, and more.

Meeting Agenda Items: At the bottom of the 'Edit Meeting Template' page, you can select 'View/Edit Meeting Template Agenda Items' to control which items and attachments will automatically be added to meetings that utilize that Meeting Template. This is also where you will set the order for those items.

You may also refer to the video tutorial for this topic: https://player.vimeo.com/video/454489511

Report Templates

From the gray navigation bar click 'Meetings' and select 'Templates.' At the bottom of the page, click the text that says 'Show Advanced Templates.' Clicking on an Agenda Report Template's title will allow you to update an existing template and clicking the blue 'Create New Agenda Report Template' button will allow you to build a new one.

From here, if you are creating a new Agenda Report Template, you can choose to create a File template or an HTML template. In general File templates are much easier to control than HTML templates. Previously created templates cannot have their format converted (HTML to File or File to HTML).

File templates must be download first to be edited. Once any changes have been made, you will then upload the new version back to BoardBook Premier. HTML templates can be edited directly through your browser. Most users find the file templates the easiest to create and edit.

Placeholders: Regardless of the format you choose, the Agenda Report Template works the same. Essentially, you can set up your document to automatically fill in meeting specific information by using placeholders.

EXAMPLE: A {{MeetingTitle}} will be held at {{Time}} on {{Date}} at {{Location}}.

The above example will automatically insert the meeting title, time, date, and location into an Agenda Report. By utilizing the Meeting Title placeholder, you can have one Agenda Report Template for any number of different types of board or committee meetings.

Agenda Item Formatting

You can also make use of a separate set of placeholders to determine the information and format of your agenda items and subitems.

EXAMPLE:
      {{AgendaItemStart}}
      {{Name}}
      {{Speaker}}
      {{Description}}
      {{AgendaItemEnd}}

The above example will automatically include the Agenda Topic, Speaker, and Description for each and every agenda item and subitem.

Be aware that the Note, Reason, and Posting Information placeholders will insert a blank line into your document even if the fields are empty.

You may also refer to the video tutorial for this topic: https://player.vimeo.com/video/454489476

Template Best Practices, Tips, and Tricks

Here are some suggestions to help you get the most out of your BoardBook Premier templates.

#1) To ensure consistency throughout your BoardBook Premier agendas having fewer Report Templates is ideal. Anything that is meeting specific can *and should* be adjusted at the meeting level, not within a template. Ideally, you should only have one Agenda Report template.

#2) Using the Note and Reason field you can add specific text, legal language, or announcements to a single meeting without creating a new template. Please be aware that any text added to these fields may also show up on your public page. This capability is controlled by settings. Contact support if you need assistance configuring this – 888-597-2665.

#3) If you want a placeholder to produce a result that is all caps follow these steps:
- Copy the placeholder
- Paste as plain text
- After the placeholder has been pasted select the placeholder and use the font option to designate all caps.

#4) Updating a Meeting Template will not impact any meeting which has already been created. Updating a Report Template updates any report run from that template, past or future.