

Downloading a PDF Packet in BoardBook Premier

While BoardBook Premier was designed with an emphasis on making online use easy for your users, options have been included to make offline use of the materials easy. Using the steps described below you'll be able to download a PDF packet containing your agenda and attachments.

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 PDF Packet
 - Using a different Template
 - Changing how information is ordered / displayed
 - Excluding attachments from the packet
- Navigating the PDF Packet

Creating the PDF Packet

From the Meetings, Minutes, and Agendas, screen, find your meeting and in the right-hand column click 'Agenda Report'. On this screen you can download a copy of the agenda without the attachments if you desire. To continue and download the PDF Packet, click on the large blue 'Download Agenda & Attachments' button.

This will open a side menu which shows each item which has at least one attachment to download. Each individual attachment is shown with a check box allowing you to exclude or include attachments:

Template:

Agenda with consent ▼

[Download](#) [Close](#)

Include Attached PDFs?

Yes, After the Entire Agenda ▼

Notify me via email when the download is ready.

Check all the Attachments you want to include.

Approve Last Meeting's Minutes

<input checked="" type="checkbox"/>	Minutes of Last Meeting	Anyone with a Login
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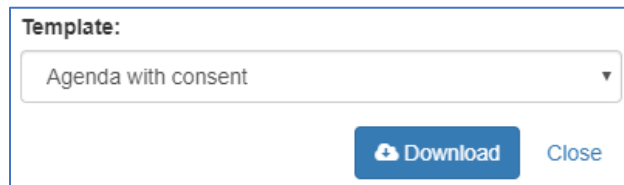
Financials

<input checked="" type="checkbox"/>	Check Register	Public / Anyone / Everyone
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Working from the top of the menu let's see what each section does:

Template

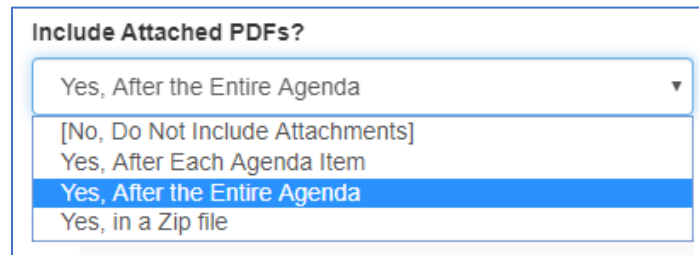
The 'Template' drop down allows you to choose which 'Agenda Report Template' will be used to generate the report. The default agenda report template for the meeting will be chosen. To choose a different 'Agenda Report Template' simply use the drop down.



A screenshot of a web interface showing a dropdown menu labeled 'Template:'. The selected option is 'Agenda with consent'. Below the dropdown are two buttons: 'Download' (with a cloud icon) and 'Close'.

Include Attached PDF's

The 'Include Attached PDF's' drop down will allow you to choose from four different options. Each option is described below the screenshot:



A screenshot of a web interface showing a dropdown menu titled 'Include Attached PDFs?'. The dropdown is open, showing 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 listing agenda item starting with the next item, breaking for each attachment.

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

Yes, in a Zip file – This downloads the agenda report and a zip file containing the attachments.

Notify me via email when the download is ready.

For very large packets you may wish to check this option. The system will send you an email when the packet is ready to download.

Check all the Attachments you want to include.

If you wish to create a download which excludes one or more attachments you can remove the check mark from any attachment or attachments and they will not be included in the download

Check all the Attachments you want to include.

Approve Last Meeting's Minutes

Minutes of Last Meeting

Financials

Check Register

Financial Report

Discuss and possibly approve construction of a Bus Barn

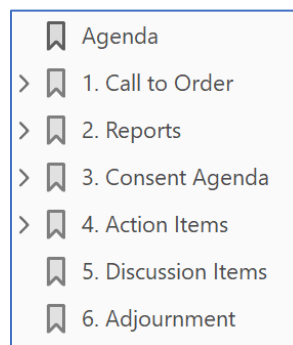
Bus Barn (Construction Masters) contract

Navigating the PDF Packet:

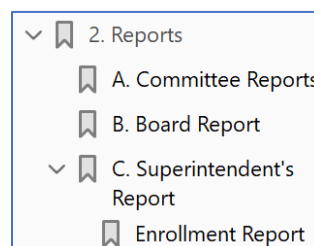
Let's have a quick look at the created packet. For this example, we will be looking at a packet created using the 'Yes, After the Entire Agenda' option where the attachments follow the complete agenda.

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 adjust the packet to display 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 user may use the bookmarks to go to any item or attachment easily.