

Create a Saved Agenda Item

As an agenda manager you may run into situations where you simply want to create an agenda item, either without going to the trouble of getting to the Edit Agenda screen, or for a meeting which hasn't yet been created. The good news is that you can do this using the 'Create Saved Agenda Item' link on the Meetings, Minutes, and Agendas Screen.

Note, this document covers a capability which is only available to users with the 'Agenda Manager' capability. You can quickly identify whether you have this permission by going to either the Home or Meetings, Minutes, and Agendas screens. If on these screens you see a 'Create New Meeting' button you have this permission.

In this document we will cover the following subjects:

Creating a saved agenda item:	page 2
Adding your saved agenda item to an agenda:	page 3

Creating a saved agenda item:

Navigate to the Meetings, Minutes, and Agendas screen by choosing 'Meetings' in the gray menu bar then selecting 'Meetings, Minutes, and Agendas'.

In the row of links below the 'Create New Meeting' button, click the 'Create Saved Agenda Item' link.

Fill in the information about the agenda item, Subject, Presenter, Attachments etc.

Save.

Adding your saved agenda item to a meeting:

Navigate to the Edit Agenda screen for whichever meeting you want to add your item to.

Note, you may already be on this screen.

In the Agenda Item Lists located in the left-hand sidebar, click 'Saved'

This will show you a list of all your saved agenda items.

Note that you can edit or view an agenda item as normal by clicking on the name of the agenda item. Either saving, or cancelling once the item is open will take you to the Edit Agenda screen. Click back on the Saved link in the left-hand toolbar to return.

Here you can either add or delete an item, or items to the agenda.

Place a check in the box next to the item or items you wish to add to the agenda.

Note that by checking the desired items and choosing the 'Delete' button in the multicolor floating toolbar you can instead delete any unneeded items. NOTE: This is not reversable, and deleted items cannot be recovered.

Click the 'Add to Agenda' button in the multicolor floating toolbar.

Once you have clicked 'Add to Agenda'

You will have the following options:

For Agenda

Parent Agenda Item

Before Agenda Item

Where do you want to go next

What agenda/meeting do you want to add the item to?

Along with Before Agenda Item these are used to position the item within the agenda.

Do you wish to go to the agenda you just placed your saved item into, or stay on the agenda you are currently editing?

When you are ready click the 'Add to Agenda Selected Agenda Items'.