Adding or Customizing Agenda Item Fields

To provide a unified training experience, accounts are typically created with a limited number of fields configured in a default way. This document will discuss how fields not initially used can be added to your agenda and how these and the fields you already use may be customized. This document may refer to videos or handouts on related subjects. These can be found on our support page. The support page can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Administration and Meeting Management Help'.

NOTE: Changing system settings incorrectly can cause issues which may be very difficult to recover from. Many of the settings are NOT intuitive. Please only change or update settings as specifically described in these or other specific BoardBook supplied instructions. If you have questions about other settings, please contact us **before** making any changes.

The permission 'Settings Manager' is required for all content in this document.

NOTE: Before customizing any of the agenda item fields, we strongly recommend making a record of the names and settings and then update this record with any changes which are made. This is information that may be helpful, or even critical for us to be able to help you moving forward.

In this document we will cover the following subjects:

Overview of agenda item fields

General categories of item fields:

Text Fields:

These are fields for which the program has no special or expected use. In general, they can be renamed and moved within the agenda item with no issues and can handle any general text.

An example of a text field is Description. While generally used to provide additional information there is nothing in the program that depends on its use in that fashion.

List of Text Fields: Description*, Comments, Time, and Rationale.

Special Purpose Fields:

These are fields for which the programmers and therefore the program have certain expectations about their use. These may be more problematic if renamed or used in a fashion other than expected.

An example of a special purpose field is Discussion. The discussion field is explicitly set aside for the minutes and interacts with the discussion minutes manager tool as well as minutes reports and their templates.

List of Special Purpose Fields: Subject*, Presenter*, Discussion*, Recommended Motion*, Action(s)*, Attachments*, Goals*, Notes*, Links, Forwarded From, Consent Agenda, Item Type, Heading, Workflow Responses, and Policies.

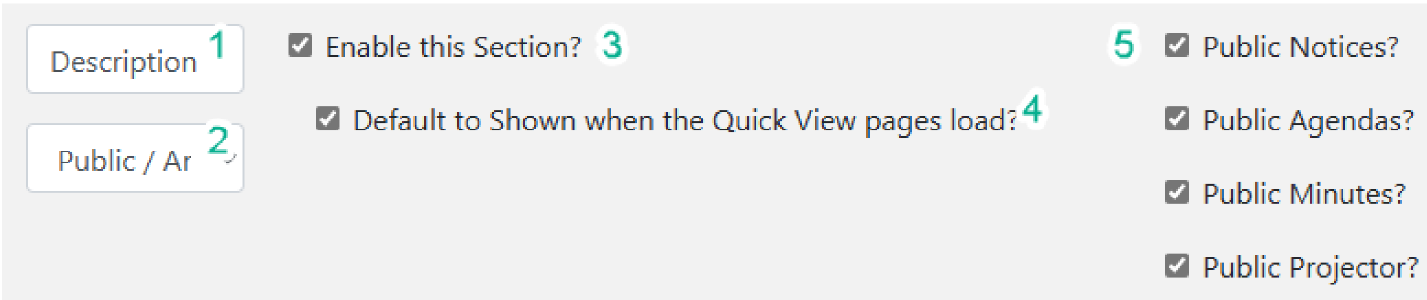
Here is a brief note for each of the special purpose fields to indicate what they do, or are tied to:

Subject*	Agenda item name. Cannot have a permission assigned.
Presenter*	
Discussion*	Explicitly set aside for the minutes and interacts with the Discussion tool as well as minutes reports and their templates.
Recommended Motion*	Explicitly tied to both the motion display text template and the Take Action tool.
Actions(s)*	Explicitly tied to the Take Action tool.
Goals*	Explicitly tied to Goals management and reporting
Notes*	Explicitly tied to user permissions and the display of agenda item information on both the Meeting Quick View and View Meeting Details screens.

* As of mid-2024 through the time of this document's creation, these fields are enabled for new accounts by default.

Typical options:

Let’s have a look at a typical field and discuss the most common changes one might choose to make:



1. This is the name of the field, for general text fields this can be changed with little to no consequences. For special purpose fields it can be changes but this is not recommended. *If you change the name of a field keep a record of this and be prepared to tell support what the original name was as this may be needed.*

2. This is a drop down allowing you to set the default permission for the field. Note that the permission of a field can be changed for any specific agenda item if needed. In general, changing the default permission is pretty low risk.

3. This check box allows needed fields to be enabled and unneeded fields to be disabled. Placing a check in the box enables the filed. Enabled fields will show up when creating or editing an agenda item. NOTE: If you enable a previously disabled field, it will be available automatically on online views. In order to add fields to any of your downloaded reports (Agenda Report, Minutes Report, or Public Notice) the relevant report template(s) will need to be updated. For more information on report templates see the Working with Report Templates handout on our support page.

4. This check box controls whether information in this field will be visible by default or need to be enabled by the user on the meeting quick view, and the quick view for your public. Our general recommendation is to enable this for general text fields. Most organizations prefer this to be unchecked on Actions and Notes.

5. If quickview is selected for the Public Notices, Public Agendas, and or Public Minutes checking the box enables the program to display information in this field provided it is set to Public/Anyone/Everyone. This also is true if the Public Projector is being used. In general, for fields where you expect to be displaying information to the public these should usually be checked.

Some specific fields to be aware of

Some fields, or field settings have information that is less intuitive, or is helpful to know more about.

Attachments Note that the permission selected here is for the field, not for the individual attachments. If this is set to any permission other than Public/Anyone/Everyone the system cannot display ANY attachments to the public regardless of the permission set on the attachment itself.

Consent Agenda For the most part, this field controls how items in the consent agenda interact with the 'Take Action' tool causing it to move directly to the next non-consent item if the 'Move to the Next Agenda Item' option is used.

Policies For public organizations we do not recommend using this field. This field allows you to link directly to a file stored in any of your online documents 'document types' provided they are configured as 'books type'. Because this produces a situation where a past meeting might be altered by someone changing or removing an online document it is not recommended that public organizations use this field. For more information see our Online Documents handouts in the Advanced Features section of our support pate.

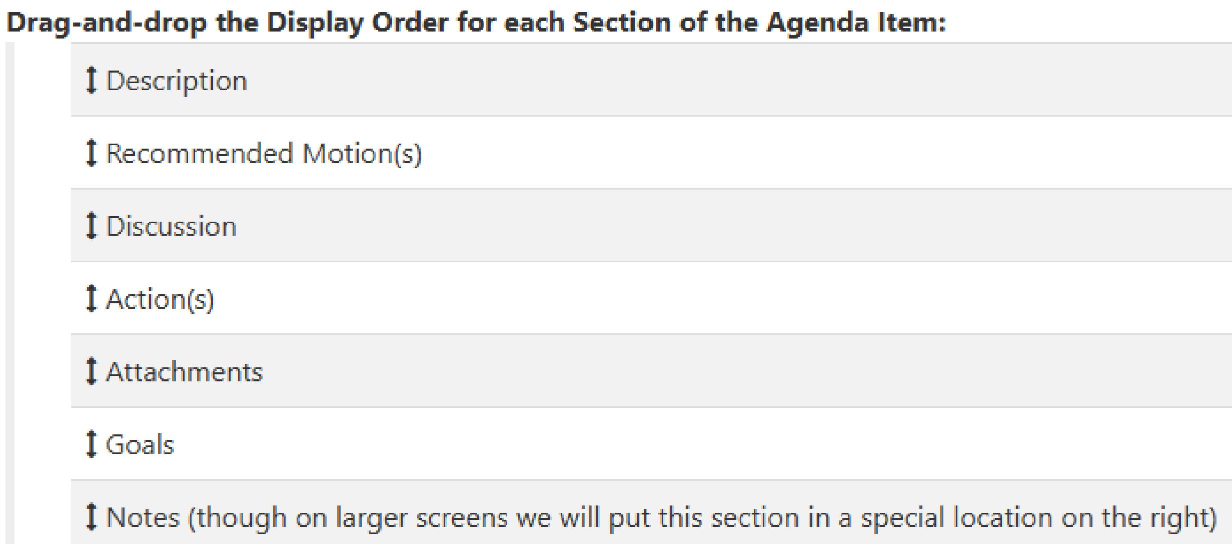
Heading This field allows you to add text above the subject of the agenda item. Some organizations use this to label sections of the agenda.

Changing the order of your agenda item fields

If you've added one or more new fields, or just in general you may want to change the order that your agenda item fields appear.

NOTE: The settings being discussed below only control the order of item fields in the various online views. The report templates control their order for any of the downloaded reports (Agenda Report, Minutes Report, or Public Notice)

Below the last of the agenda item fields you will find a section that look similar to the screenshot below:



Using drag and drop you can move the fields into the order you want. Note some exceptions below:

Heading	As heading automatically appears above the subject it will not appear on the list and its position cannot be changed.
Subject	All of the fields except Heading appear below the subject, as such it also does not appear on this list.

Making a change

Note: ***Changing system settings incorrectly can cause issues which may be very difficult to recover from, should you choose to revert them at some point in the future. It is best to use caution, and not to assume the function of unfamiliar settings based off of their names. Please only change or update settings as specifically described in these instructions to ensure the best outcomes.*** Please remember that you always have the option to ask us to make the changes for you.

The user permission Settings Manager is required to make any changes in settings. To check for this permission, look at options in the gray menu bar, if you have settings listed you have this permission.

In the gray menu bar select 'Settings' and then 'Meeting and Agenda Options
Scroll down to the 'Define your Organization's Agenda Item Sections for Meetings and the Public Page' section

NOTE: As previously mentioned, if you change the name of a field keep a record of this and be prepared to tell support what the original name was as this may be needed.

Enable, update and reorder as desired, document any changes and save.

Requesting a change

Instead of making the change yourself, you can contact our support team and ask us to make the change for you. Below is the information we will need:

Before requesting any change, please ensure you fully understand both the capability described and the options which are available.

Overall, what do you want to change? Please refer to the subject of this handout.

For any currently disabled field you want enabled or changed provide the following information:

Name of the field:
Name you want for the field if different:
Default permission:
Should the field be shown be default on Quick View pages?
If the default permission is Public/Anyone/Everyone, which of the following should display the field:

- Public Notices
- Public Agendas
- Public Minutes
- Public Projector

Where in the list of agenda item fields should this appear?

Note: Even if you have us make the change, it is still your responsibility to know and be prepared to inform us of any changes made to your agenda item fields.