**BoardBook**®

**Postponing a Meeting in BoardBook Premier**

In this document we will go over a feature which makes it easy to postpone meetings in BoardBook Premier program.  This document contains references to other documents and videos located on our support page.  As always access the support page by clicking on the blue circle with the question mark (found at the top of the BoardBook page) and selecting 'BoardBook Help'.

# Subjects

# Postponing a Meeting

Cancelling a meeting has been part of BoardBook Premier since the beginning and is a common way to handle cancelled meetings, notifications, and public postings. For more information see the 'Cancelling a Meeting in BoardBook Premier' located on our support page. Features like Import Agenda Items have made it easy to reschedule meetings as needed.

With the Postpone Meeting feature which came with the February 2024 update, the creation of the new meeting, importing of the agenda items from the postponed meeting and in many cases notification for your public subscribers and on your public page are very nearly automatic.

In short, when you Postpone a meeting, the 'postponed' meeting is cancelled, and a new 'rescheduled' meeting is created with the same Meeting Title, Type, Time, Location, and Agenda Items as those in the original meeting. You will be left to set the Date and update any other changes needed for the meeting. The meeting will be in the 'In Development' status until this is changed manually.

NOTE: When a meeting in the 'Published' status is cancelled the meeting may or may not be displayed in an updated format on the 'Public Page', and notification emails may or may not be sent to users and public subscribers. The settings and configuration for these situations are covered in the 'Cancelling a Meeting in BoardBook Premier' located on our support page. We recommend reviewing this document if you intend to use the Postpone Meeting feature.
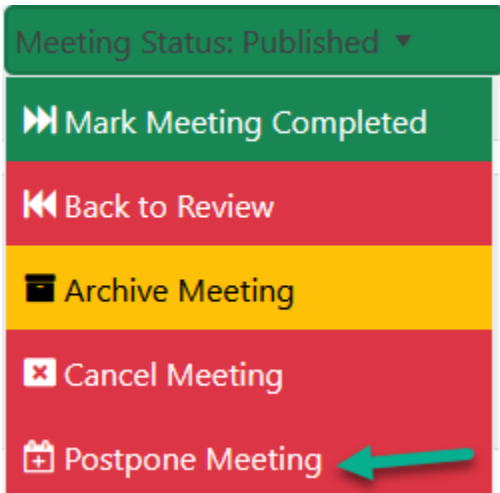
# How to Postpone

Postponing a meeting is very straightforward.

Find the meeting you wish to postpone
Simply click that meetings on the current meeting status and choose 'Postpone Meeting' from the drop down.
NOTE:  Depending on your settings related to cancelled meetings you may want to update the 'Reason' field for the meeting before postponing.



The meeting you've chosen to postpone, hereafter referred to as the postponed meeting, the status of this meeting will be set to 'Cancelled'.  Any actions setup on your account to be taken for cancelled meetings will occur.  (This will be discussed in more detail in the next section 'What happens when a meeting is Postponed'.

The settings, excluding the meeting date, and the list of agenda items for the postponed meeting will be used to create a new meeting and you will be taken to the 'Edit Meeting' screen for this new meeting.

You will set the new meeting date for the meeting as well as make any other needed changes.
Your new meeting will have the same agenda items, attachments etc., as the postponed meeting.

NOTE:  It is only possible to use the Postpone Meeting option a single time for a meeting.  If a meeting needs to be rescheduled again we recommend the following steps:

Cancel the meeting
Create a new meeting
Import the agenda items from the Cancelled meeting

# What happens when a meeting is Postponed:

Let's look at a listing of the steps and timeframe of what happens when a meeting is postponed:

Optional step:  Add a note as to the reason for postponing/cancelling the original meeting.  This is typically done in the 'Reason' field of the to be postponed meeting.

Meeting status is set to postponed

<u>Original meeting is cancelled</u>
If the original meeting was in the Published status the following steps may occur depending on settings
Public page updated to show the meeting as cancelled
Text from the 'Reason' field added to public page for the meeting in the meeting column
Emails to public page subscribers sent concerning cancelled meeting, these contain any 'Reason field text

NOTE:  The 'cancelled' meeting can be viewed / reviewed from the 'Meetings, Minutes, and Agendas' page by clicking the 'Cancelled Meetings' link located above the list of meetings.
NOTE:  For more information on what happens, or controlling what happens when a meeting is cancelled, see the 'Cancelling a Meeting in BoardBook Premier' located on our support page.

<u>User is taken to the Edit Meeting screen for the 'new' rescheduled meeting.</u>

The meeting will be in the 'In Development' status
Any agenda items for the original meeting will be replicated in this meeting.  This will include any agenda item fields such as presenter, description, or attachments.
Meeting Date will be populated but may need to be changed
Any other meeting settings should be updated at this time
Click 'Save & Add Agenda Items to Meeting' to save any changes and continue to the Edit Ageda screen
Click 'Save & Close' to save any changes

At this point, effectively the Postpone Meeting feature is complete and the meeting may be treated the same as any other meeting with a single exception.  It is only possible to use the Postpone Meeting option a single time for a meeting.  If a meeting needs to be rescheduled again we recommend the following steps:

Cancel the meeting
Create a new meeting
Import the agenda items from the Cancelled meeting