

## Working with File Based Report Templates

In this document we will go over Report Templates in the 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'.

Report templates format your downloaded Agenda, Public Notice, and Minutes Reports. In this document you will see where and how you can modify existing templates as well as add new ones.

This handout has four sections:

<b>Report Template Fundamentals:</b>	Starting on page 2
<b>Working with the RTF or Word template:</b>	Starting on page 4
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NOTE: While report templates are used for Agenda, Public Notice, and Minutes Reports for the purposes of simplicity in this document we'll simply use the terms Report and Template or Report Template.

# Report Template Fundamentals

## What is a Report Template?

A report template formats the downloaded agenda report, minutes report, or public notice. It controls the 'look and feel' of the downloaded document.

## What does a Template do?

A report template essentially does three things:

Sets the page formatting: This is everything from margins and headers to page size.

Places and formats text: Controls what text is included as well as where on the page it appears. The font, font size and style of the text in a template will be seen in the report. NOTE: This applies for most common fonts. Not all fonts are supported.

Replaces 'placeholders' with information from your meeting or agenda: This will be explained in more detail later but simply you would have a placeholder for something like the date. When the report is run this placeholder is replaced with the meeting date. This is the same concept that is used with a mail merge.

## How does Page Formatting and Fixed or Static text Work?

As described briefly in the 'What does a Report Template do' section, how a template page is formatted, margins, headers etc., will be replicated in the downloaded report. This is the same for static or fixed text. In short, this means you can treat the report template just as you would a Word document.

## How do placeholders work?

Placeholders are used to insert information that changes or is dynamic between meetings, into your report. For example, even for a regularly scheduled meeting, things like the date, location, and agenda items will vary from one meeting to the next. Placeholders take that information from the specific meeting you're running the Agenda Report for and replace the 'placeholder' with the actual meeting date, location' and list of agenda items. See the example below:

Here is a paragraph of text from an Agenda Report run for a Regular Meeting:

A Regular Meeting of the Board of Directors of County School District will be held Thursday, September 9, 2021, beginning at 6:30 PM in the Cafetorium - Main Campus, 12345 Yellow Brick Lane, Austin, TX 12345.

Here is what that same paragraph looks like in the Agenda Report Template used to create the Agenda Report:

A {{Title}} of the Board of Directors of County School District will be held {{Date}}, beginning at {{Time}} in the {{Location}}.

You'll notice that in the text above there are certain words which are enclosed within double braces {{}} these are called placeholders. When this template is used the program inserts information from the specific meeting in place of the placeholders. This is how 'A {{Title}} of the Board of Directors' becomes 'A Regular Meeting of the Board of Directors'. As you can imagine this makes a single template very flexible because it can be used with almost any meeting with no changes.

## Template Settings

In addition to the template file, there are settings that control the behavior of the template when used. Unlike Placeholders this information doesn't appear on the word document but rather are controlled on the update report template screen. For example, the placeholder {{date}} will, as discussed previously, insert the date into the report. Specifically, how that date is formatted, is controlled by a setting on the management page for that specific template.

## Where the magic happens.

In BoardBook Premier two things are required for a user to manage templates, the user must have the 'Agenda Manager' permission, and the Organization's Account must be configured to allow template changes.

To manage your report templates, follow these steps:

In the Gray Menu bar click on 'Meetings'.

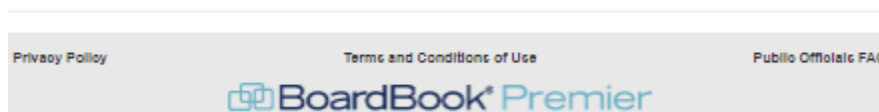
Now choose 'Templates'

On this screen you will see your 'Meeting Templates'. Meeting Templates have their own video.

Below any meeting templates you'll find a 'Show Advanced Templates link centered on the screen.

This will be just above the BoardBook 'name block' at the bottom of the screen.

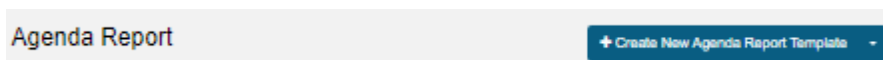
[\[Show Advanced Templates\]](#)



Click on [\[Show Advanced Templates\]](#)

On this screen you'll find options for different kinds of templates. As previously mentioned this handout only covers Agenda Report, Minutes Report, and Public Notice.

NOTE: If in the right-hand column for Agenda Report, Minutes Report, and Public Notice, you don't see a blue 'Create New Agenda Report Template' button, as shown below, your organization account isn't setup to allow you to manage templates. Contact BoardBook support to get this setting enabled.



# Working With the RTF or Word Template

## Step One: Creating a new template or modify existing.

### Create New:

If you are going to create a new template, the easiest way to do this is to copy an existing template to modify. To do this follow these steps:

Navigate to the Templates screen and choose [Show Advanced Templates] as previously described.

Scroll down to the type of report template you want to create (Agenda, Minutes, Public Notice)

Click the blue 'Create New (type) Report Template' button

Choose 'Create: File'

On this next screen you can 'Create An Empty Template', or 'Copy an Existing File Template'

We recommend using the 'Copy' option, this will create a new template that already has your template settings and text in place. You can then modify the template and template settings as desired.

Once you've made your choice, you'll be taken to the 'Create Agenda Report Template' screen.

Find the 'Agenda Report Template Name' field in the right-hand column and give your template a unique name.

### Modify an Existing File Template:

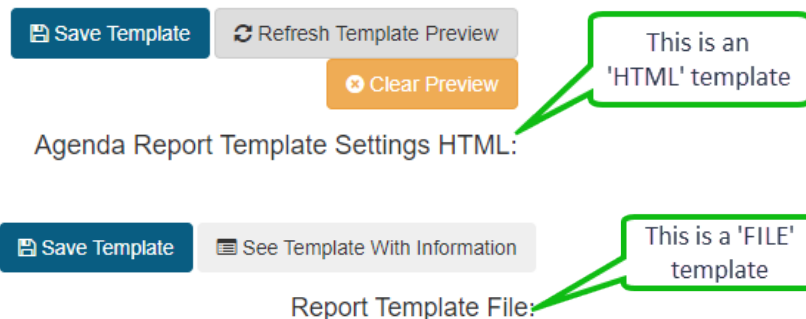
To modify an existing file template, follow these steps:

Navigate to the Templates screen and choose [Show Advanced Templates] as previously described.

Scroll down to the type of report template you want to create (Agenda, Minutes, Public Notice)

On the right-hand side, click on the name of the template you want to modify

NOTE: There are two formats for templates, File and HTML, this handout only relates to working with file templates. You'll need to make sure the template you are modifying is a 'File' template as opposed to an 'HTML'. To do this look in the right-hand column and see examples below:



Ensure you are working with a 'File' template.

## Step Two: Downloading the template file

Whether you're modifying an existing template, or creating an entirely new one, this step will be the same.

In the right-hand column click the gray 'Download Report Template File'

Note: You will need to know where this file has been downloaded on your computer in order to open and edit it in the next step.

Note: The file will download with the name of your organization, and the type of template e.g., County School District – Agenda.RTF. The download will NOT have the name of the template.

### **Step Three: Modifying the template file**

Note: As previously mentioned, the downloaded file will be either an RTF or Word file type. Either of these can be opened and modified in most word processing programs such as Word. To any extent that specific instructions are given they will be applicable to Word. We presume that any user wanting to modify their templates is familiar with their word processor of choice.

Modifying the template file may involve making one or more of the following changes:

Changing the margins

Changing the header / footer contents or formatting

Changing, adding, removing, or formatting text

Working with placeholders

Changing, adding, removing, or formatting graphics

Each of these begins with opening the downloaded RTF file in Word or your word processor of choice. Each section below will presume you have the file open, and will be addressed below:

Changing the margins: This is one of the most straight forward changes, simply set the margins in the template to the settings you want for your downloaded report.

Changing the header / footer contents or formatting: Like changing the margins, simply format the header / footer as you want your downloaded report to appear.

Changing, adding, removing, or formatting text: Like changing the margins, any text in the template can be added, edited, deleted, or formatted as you normally would. NOTE: As previously noted, not all fonts are supported. If you have an unsupported font in a template a supported font will simply be substituted when you download the resulting report.

Working with placeholders: This is where things get interesting for your templates. As we've previously discussed, placeholders are simply replaced by the information for the specific meeting or agenda. Therefore, the placeholder {{title}} will simply be replaced with the 'Meeting Title' for the meeting. There are some notes for placeholders.

Meeting Placeholders: There are two distinct types of placeholders, meeting placeholders are used for meeting information, and to identify where the list of agenda items should appear.

Agenda Item Placeholders: These placeholders identify information about the agenda item list. They identify which agenda item fields, e.g., Item Name, Presenter, Description, should appear in the downloaded report, what order they should appear and control general formatting, font, font size, font style.

Adding a Placeholder: Adding a placeholder is as simple as either typing into your template or copying it from BoardBook into your template. When the information represented by the placeholder is displayed in the report any formatting, font, font size, font style, used on the placeholder will be seen in the report. See the example below:

I've updated the template we looked at earlier to bold the date and time placeholders and underlined the location placeholder:

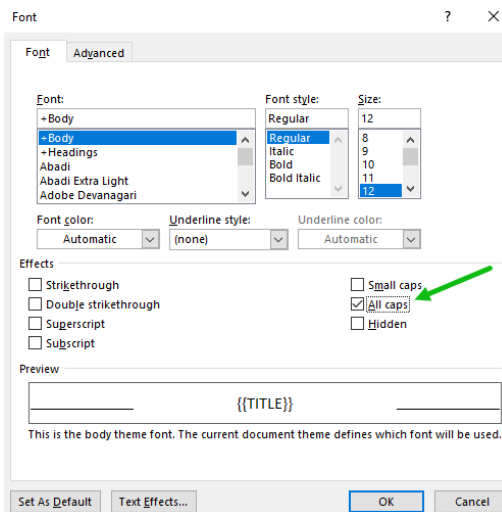
A {{Title}} of the Board of Directors of County School District will be held **{{Date}}**, beginning at **{{Time}}** in the {{Location}}.

When we run the report, we see the result below:

A Regular Meeting of the Board of Directors of County School District will be held **Thursday, September 9, 2021**, beginning at **6:30 PM** in the Cafetorium - Main Campus, 12345 Yellow Brick Lane, Austin, TX 12345.

### Notes about placeholders:

Placeholders are case sensitive. {{Title}}, will produce your meeting title, {{title}} will simply be read as text and display {{title}} instead of your meeting title. Likewise {{TITLE}} will not work. If you want a placeholder to display as all caps you must use font formatting to accomplish this. For example, if we type or copy the placeholder in as {{Title}} then (in Word) select the placeholder, right click, choose 'Font', (or otherwise navigate to font options), I can place a checkmark for 'All caps' to get the desired result.



A placeholder on a line by itself will take up a line even if empty. Most of the commonly used placeholders are required to create a meeting, for example a meeting has to have a time, date, and location. Some, such as Note, Reason, and Posting Information, are optional. At this time if one of these 'optional' fields is on a line with no other text, it will take up a single line even if the field is blank. In the example text below we see the note placeholder is on a line by itself:

1 The line below contains the Note placeholder  
{{Note}}

3 The line above contains the Note placeholder

See below, in the downloaded report there is a blank line between line 1 and 3

1 The line below contains the Note placeholder

3 The line above contains the Note placeholder

Changing, adding, removing, or formatting graphics: Adding graphics, such as an organization logo to your templates can make your downloaded reports stand out. Because any instructions on managing graphics in a document is very dependent on the program being used, we will only be discussing general guidelines:

NOTE: Graphics will not typically show up, or show up correctly on the template preview or, on the report preview. You will need to download the preview or report to see them correctly.

Adding a graphic to an RTF document can greatly impact the file size. As a quick reminder, file size relates to how much space in memory, or on a hard drive that a file takes and is not generally related to the number of pages in a template. Templates are rarely more than one or two pages although the downloaded report created using a template report may be dozens or hundreds of pages.

Generally larger graphics will result in a larger template file size. Most word processors have a function or tool that can be used to reduce the file size of a graphic.

Working with Text Boxes or Tables: Both text boxes and tables can be used in file templates. Like graphics I will not go into any specifics but will provide some general guidelines:

NOTE: Like graphics, information in text boxes and tables may not show up, or show up correctly on the template preview or, on the report preview. You will need to download the preview or report to see them correctly.

For text boxes you may need to fine tune their position. Upload your template, download the preview and then make changes based on the downloaded preview.

Text within the table or text boxes generally shows up as expected but it's a good idea to download and check a preview. If there's an issue adjust the text box or table in your template, upload the updated template and recheck the download.

#### **Step Four: Uploading and Review Your New or Updated Report Template**

On the same screen where you download your report template you'll find the 'Upload New Report Template File' button. Clicking this will allow you to upload your updated file. The upload works the same way as adding attachments with both a file browser and drag and drop options.

Once your file is uploaded the system will generate a sample report using your current template and template settings. Just as when running a report, the preview may not accurately reflect formatting and graphics.

Download a copy to check the formatting of all text, margins and graphics. Ensure this looks as you expect. If it doesn't update the template on your computer, save, reupload and check again.



# Working with Template Settings

On the same screen where you can download or upload your template, you'll see a list of template options running down the right-hand side of the screen. In this document we will not cover each individual setting but rather cover those which are most commonly used. Most of these settings have a blue circle / question mark icon next to them where additional information can be found.

If the Meeting Date is included, how is it formatted: This setting offers several choices for formatting the date in your template. NOTE the selected formatting will be used for all occurrences of the date placeholder.

If the Meeting Location is included, select how it should be displayed: Basically, you have inline or wrapped options, or to just display the address, or just the location/room information.

Indent Child Agenda Items: Checking this option will cause child items to be indented

Would you like any Agenda Item Subjects bolded: You can bold top-level items, or parent items. To bold all items, bold the {{Name}} placeholder on your agenda.

Would you like any Agenda Item Subjects underlined: Similar to the proceeding option.

Include Attachment Page Numbers with your Agenda Item Subjects: If the Agenda and Attachments are downloaded this will place the page number of the first attachment to the right of any agenda item which includes attachments in the downloaded packet.

Action Settings: Generally, only used on Minutes Templates by organizations using the Minutes Manager Tools.

Attendance Settings: Generally, only used on Minutes Templates by organizations using the Minutes Manager Tools.

List Trailing Character for Agenda Item Numbers: This provides options related to how item text appears to the right of the item number. Here are examples of the options:

## Space

### IV. Consent Agenda

Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time. Consent agendas typically contain routine or self-explanatory non-controversial items. Typically any board member may request that any item be removed from the consent agenda for separate discussion and or action.

- A. Approve minutes from last months meeting(s)  
Draft minutes for September Regular Meeting

## Tab

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- A. Approve minutes from last months meeting(s)  
Draft minutes for September Regular Meeting
- B. Finance Report

## Nothing

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Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time. Consent agendas typically contain routine or self-explanatory non-controversial items. Typically any board member may request that any item be removed from the consent agenda for separate discussion and or action.

- A. Approve minutes from last months meeting(s)
- Draft minutes for September Regular Meeting

# Managing Your Templates for Your Meetings

Now that you have your new or updated template you may want to set or change how it's used for your meetings. This typically will involve either changing the 'Preferred Template' or using default overrides.

**Preferred Report Templates:** For both the Agenda and Public Notice reports, you can set a preferred template. You have two preferred options for each template category. These options work as described below:

**Preferred Report Template:** Any time you or your users run a report of this type, Agenda, or Public Notice, this template will automatically be selected. The user running the report can manually choose to use a different report template.

**Preferred Report Template for the public page:** If you have your public page configured to allow the public to download a report, any time a member of the public chooses to download a copy of the agenda or public notice this report template will be used. Unlike users who login, the public does not have an option to choose a different report template.

**NOTE:** This setting is only applied if both the 'quick view' is being used to display the report, and the public page options have been set to allow the public to download the report for the meeting in question.

**Template Overrides:** Template overrides are used if you want a specific meeting, or for example all of the meetings created with a specific meeting template, to use a different report template than that which is set as the preferred report template. For example, imagine I have an Agenda Report template that I use for all of my Monthly and Special meetings but I want my committee meetings to use a different Agenda Report Template. The simplest option is to create a meeting template to use for my committee meetings and in that meeting template specify a report template override.

**Setting a Template Override** This setting can be made while creating a meeting, or meeting template, or can be edited after the fact. Here are the steps for configuring an existing meeting to use a template override.

Click on the meeting and choose 'Edit Meeting'

Scroll to the bottom of the screen, just above the 'Save & Add Agenda Items to Meeting' click the [Show Advanced Options] link.

Note: If you don't see this option, your Advanced Options are already being displayed and you can scroll up to find them.

Find the 'Template Advanced Options'

For each of your template report categories you will have a drop down, click the drop down

Each drop down will offer the option to [Use the Default Template] which will be the preferred template, the other options will be any other report template you have in this category.

Once you've made any changes remember to scroll to the bottom and save.

Similar steps are used to modify a meeting template. You can learn more about meeting templates on our support page.