

Working with Meeting Templates

In this document we will go over Meeting 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'.

Meeting templates are used to replicate meeting settings and agenda items as part of the initial meeting creation.

Note: If you are interested in formatting or changing the format of your downloaded reports, such as the agenda or minutes report. That would involve report templates which are discussed in the 'Working with Report Templates' handout.

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Meeting Template Fundamentals

What is a Meeting Template?

A meeting template is a collection of settings and possibly agenda items which can be applied to a meeting during meeting creation.

Benefits of using a Meeting Template?

Consistently: All meetings created with the same meeting template will have the same initial settings and agenda items.

Makes working with non-standard meetings easier: Meeting Templates are very helpful when your meetings have different initial setups.

Does using a Meeting Template lock a meeting into certain settings?

No, a Meeting Template sets the initial settings, these can always be changed for the specific meeting being working on.

Who can create or modify a Meeting Template?

Except for meeting templates for committee meetings, a user with the Agenda Manager permission can create or modify any Meeting Templates. To create or modify a meeting template for a committee the user must have the 'Agenda Manager' permission for the committee. It is recommended that a user have some experience with setting up meetings and agendas prior to working with meeting templates.

Does updating and existing Meeting Template make any changes to existing meetings?

No, the information / settings from a meeting template are only applied when the meeting is created. Once created, the meeting template no longer has any control over a meeting

Create a new Meeting Template

Navigate to the Templates screen (click on Meetings in the Gray Menu Bar and choose Templates). This will show any Meeting Templates you already have in the left column and have a blue 'Create New Meeting Template' button in the right column.

Click the 'Create New Meeting Template' button.

You will quickly notice that this screen looks very much like the 'Create Meeting' screen you are familiar with.

Add a Template Name. (template description is optional)

Fill in or update the settings and fields you want to be used when you select this Meeting Template.

Recurring Meetings: For meetings on a consistent day of week / week of month schedule, for example first Monday of the Month, you can pick 'Meeting Day' and 'Week of the Month' to automatically pick meeting dates. Note, that at the time you create a new meeting it will simply populate the next upcoming date which meets the criteria.

Note: If you are not familiar with the Advanced Options (seen below the 'Meeting Footer' field), we have a video on our support page covering 'Advanced Meeting Options'.

Once you've configured the information and settings the way you want click the 'Save Meeting Template' button at the bottom of the screen.

Once you've saved, you'll be taken to a screen where you can add agenda items to your Meeting Template if you wish. Details on this process are covered in the 'Adding Agenda Items to a Meeting Template' section.

Adding Agenda Items for a Meeting Template

Once you've saved a newly created Meeting Template, or if you've clicked the 'View/Edit Meeting Template Agenda Items' link on an existing template you'll be taken to a mostly familiar looking screen.

On this screen you can build, or edit an agenda which will be applied along with the other 'Meeting Template' settings for any meeting created with this Meeting Template.

While it looks a little different, for the purposes of adding or managing agenda items this screen works exactly like the 'Edit Agenda' screen.

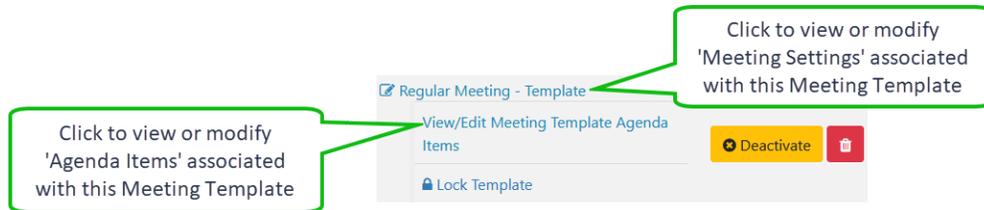
Modify an Existing Meeting Template:

To modify an existing meeting template, follow these steps:

Navigate to the Templates screen and find your existing meeting template in the left hand column.

To update the meeting settings for the template click on the template name.

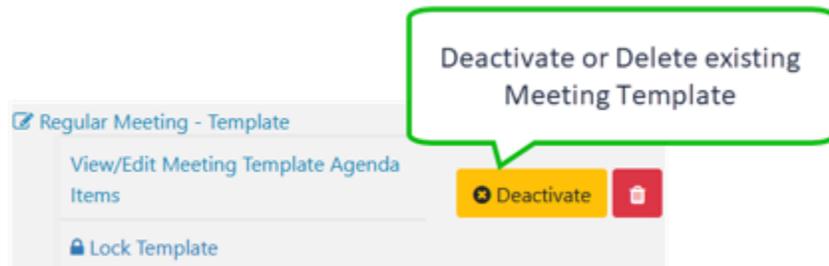
To update the agenda items associated with a meeting template click on the 'View/Edit Meeting Template Agenda Items' link for the specific template.



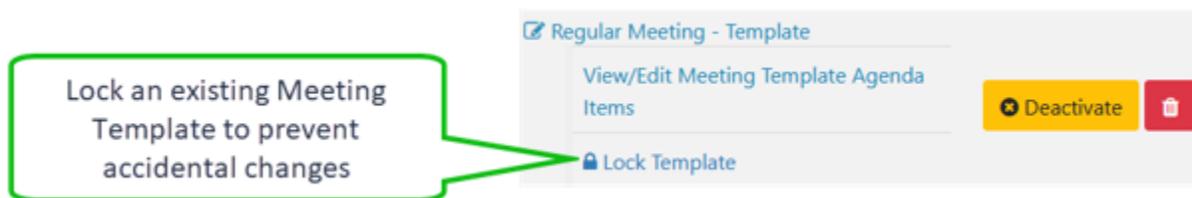
NOTE: Making changes to a Meeting Template will not apply those change to any meetings which have already been created. Changes will only apply to meetings created after the changes have been made.

Other Meeting Template Options

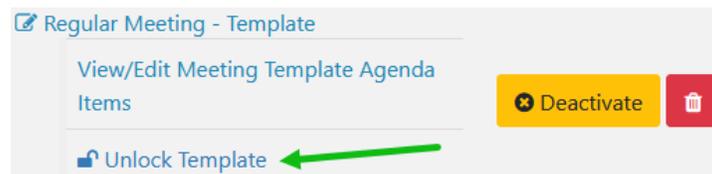
Individual Templates may be either Deactivated or Deleted using the orange 'Deactivate' button, or red Trash Can icon associated with a given template



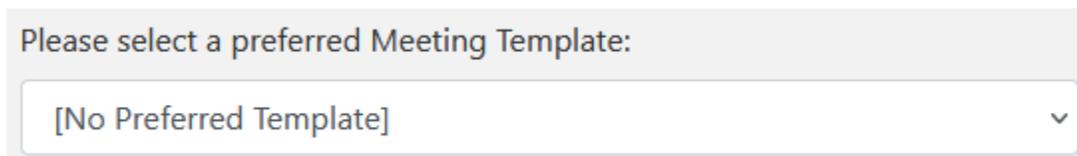
Templates may be locked by clicking the 'Lock Template' button.



A locked Meeting Template works very much like a locked Meeting or Agenda. Changes cannot be made without unlocking the template first. A locked template will have an 'Unlock Template' option as shown below:



A template may be set as 'Preferred'. This will automatically select that template when a new meeting is created.



At this time, we are recommending against using the preferred meeting template. This is because of an issue where settings made by a meeting template may not be properly cleared if the user switches to a different template.

Situations where Meeting Templates Shine

In general Meeting Template are quite helpful, however there are some situations where that are particularly useful.

Meetings with either different report templates, or and or different publication expectations.

Meetings of these sort will typically use the advanced meeting options. Having meeting templates setup for these situations minimizes the chance that you, or someone else may forget to update the advanced options. A common example is a Committee Meeting which may use different report templates than meetings of your full board.

Meetings which follow a very similar agenda layout or pattern.

While using Import (import agenda items) makes this pretty easy, having the items populate automatically can be even easier.