Agenda Online

user's guide

➢ *for board members*

agenda online

Agenda Online Version: 1.0

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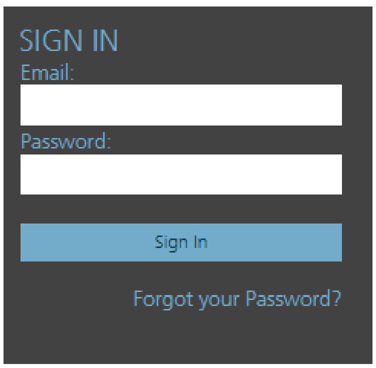
Logging In

Tip: Once you reach the Portal login, you may want to add this page to your Favorites list on your computer or create a shortcut on your desktop so you can access it faster in the future.

To Log In:

1. Go to your District's Agenda Online Homepage. [district.agendaonline.net]
2. On the right side of the page, type in your entire email address in the email box.
3. In the password box, type in your password.
4. Click on Sign In.



If you forget your password:

1. Click Forgot Your Password?
2. A pop up window will ask you to type in your email address.
3. Type your email address.
4. Click Send Password.
5. Your password will be emailed to you.

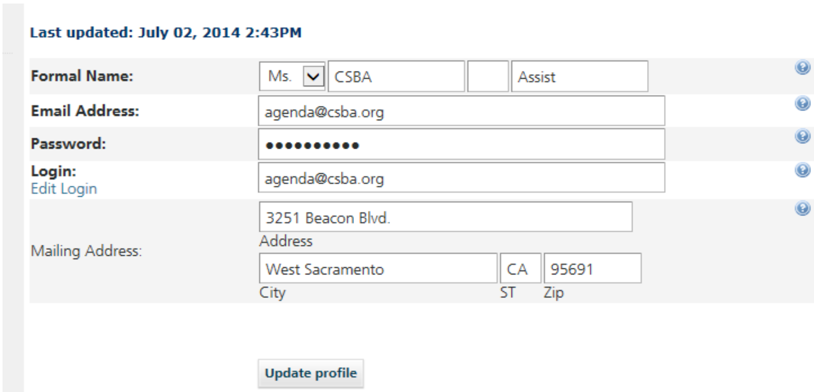
My Account

Agenda Online Users can easily manage their own account information using My Account.

My Account: Making Edits

To edit your account:

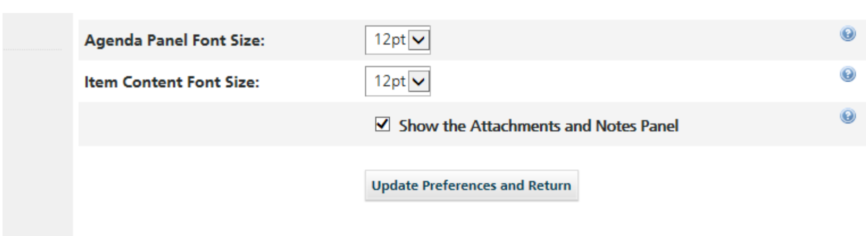
1. Click my account located on the top right side of the home page
2. Select click to the edit
3. Users may edit their contact information, email address, and password.
4. When finished, click update profile located at the bottom of the page.



My Account: Preferences

Users may set individual preferences to make viewing Agenda Online easier. Agenda font size and agenda content font size may be set individually. To set user preferences:

1. Click on My Account in the upper right hand corner.
2. Click Preferences on the left side of the screen.
3. Using the drop-down box, select the Font Size for the Agenda Panel. This is the agenda that is displayed on the left side of the item content.
4. Using the drop-down box, select the font size for the Item Content. This is the area that shows in the middle of the screen and includes Recommendation, Rationale, Speaker, etc.
5. Click Update Preferences and Return to activate the changes.

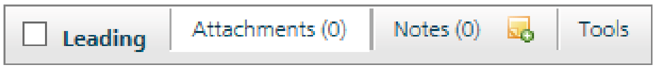


Reviewing an Agenda

When a meeting is complete, the Meeting Manager will send an E-mail to Board Members notifying them that the agenda is published and ready to be viewed.

To review a meeting:

1. Open the meeting from home page by clicking on either the meeting list on the right side of the screen, or on the meeting listed on calendar
2. From the meeting tool bar, select attachments.



3. This screen will show the complete agenda. Links to agenda attachments will appear below the agenda item.
4. To open the attachment, click the underlined link. The attachment will open for review. When finished reviewing the document click the X at the top right of the screen to close the document and return to the agenda.

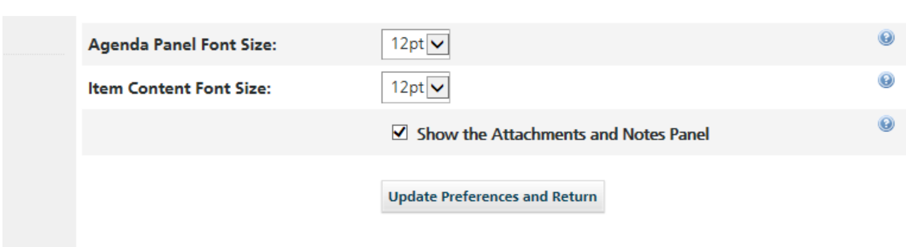
Reviewing the Agenda: Changing the Size of the Agenda Area

The Agenda Area size may be changed by hovering your curser over the vertical line that separates the Agenda Area from the Rationale Area on the meeting Screen. When the curser changes to a double sided arrow, click and drag the vertical link to make the Agenda Area larger or smaller.

Reviewing the Agenda: Changing Font Size of the Agenda

Agenda font size and agenda content font size may be set individually. To set user preferences:

1. Click on My Account in the upper right hand corner.
2. Click Preferences on the left side of the screen.
3. Using the drop-down box, select the Font Size for the Agenda panel. This is the agenda that is displayed on the left side of the item content.
4. Using the drop-down box, select the font size for the Item Content. This is the area that shows in the middle of the screen and includes Recommendation, Rationale, Speaker, etc.
5. Click Update Preferences to activate the changes.



During a Board Meeting

To view the Agenda for a Board Meeting:

1. Open a meeting agenda from the homepage by clicking on either a meeting listed on the right side of the screen, or a meeting displayed on the calendar.
2. You will be routed to The Meeting Agenda page.
3. On the left is the agenda in its entirety. You can use the scroll bar to move up or down.
4. In the center is where the rationale will be displayed.
5. In the upper left corner above the name of the meeting are arrows which allow you to navigate through the agenda items. Click on the right arrow to move forward in the agenda or click on the left arrows to move backwards in the agenda.
6. In the center is the Meeting Toolbar which has the options of Leading, Attachments, Notes and Tools. Please continue reading to see the description of each item on meeting toolbar.

Meeting Toolbar: Leading/Autopilot

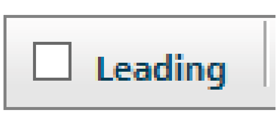
Leading

During a Board meeting there is the option of Leading; which allows a designated user to lead the meeting and all other user's screens to follow as the leader navigates through the agenda. Only one person can lead the meeting at a time.

Tip: One option would be to designate the Board President as the leader and the computer that is projected to the audience would be on autopilot.

To Lead:

1. Open a meeting agenda from the homepage by clicking on either a meeting listed on the right side of the screen, or a meeting displayed on calendar.
2. From the Meeting Toolbar select Leading.



Autopilot

Board members may select Autopilot which gives the Leader navigational control of the member's meeting screen. When the Meeting Manager, or designated leader, advances through the agenda, the Board member's screen automatically changes within a few seconds.

To turn on Autopilot:

1. Open a meeting agenda from the homepage by clicking on either a meeting listed on the right side of the screen, or a meeting displayed on calendar.
2. From the Agenda Panel on the left side, select Autopilot.

Members may navigate the meeting on their own by un-checking the Autopilot box or by clicking on an attachment of other agenda items. To return to Autopilot, simply click the box again.

Autopilot only controls the movement from one agenda item to the next. Attachments must be opened on each individual computer. If a board member has been designated as the leader, personal notes will not be shared with those who have selected autopilot, unless that individual's screen is being projected.

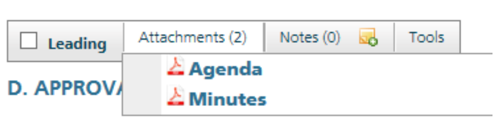
Note: If a member clicks on another item or opens an attachment while on Autopilot, the action will automatically take them off Autopilot. Autopilot must be selected again to return the screen to autopilot.

Meeting Toolbar: Attachments

If the Meeting Manager has attached documents to an agenda item, Board Members or other users may access those attachments in two locations from the Agenda Meeting screen.

Option 1:

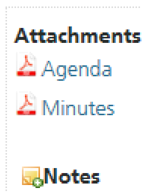
1. Hover the mouse over the word attachments in the meeting toolbar.
2. A list of attachments will appear in a dropdown box.



3. The user may open the attachment by clicking on the name of the attachment.

Option 2:

1. On the right side of the screen there is the heading Attachments which lists all attachments for that specific agenda item.



2. Click on the name of the attachment.
3. The device you are using will determine how the attachment opens.

NOTE: Please remember that users must open an attachment themselves to see it on their computer screen while in Autopilot mode. When the Leader opens an attachment, it will only show on the public screen, if projected.

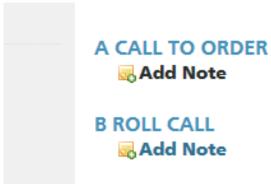
Meeting Toolbar: Notes

The Notes feature is designed to enable individual users to attach private reminders and comments to a particular agenda item. Although Board Member notes will not be projected on the public meeting screen or included in an agenda or minutes report, only appropriate information should be added as a note. If the Meeting Managers screen is the one that will be projected during a meeting, that individual will need to pay particular attention to information entered through the Notes feature as they will be displayed to the public.

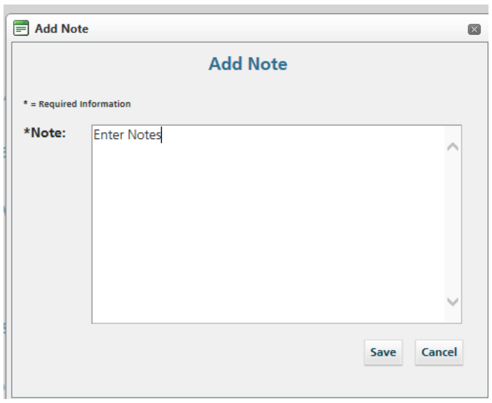
Agenda Online provides three options to use the Notes feature:

Option 1:

1. Open your meeting.
2. From the Meeting Toolbar select Notes.
3. From here you have the ability to add a new note:
    a) Select add note under the agenda item you wish to add a note to.



b) Type in the reminder/comment in the New Note screen.



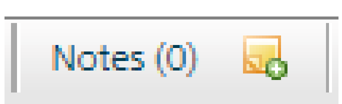
c) When finished, click on Save or Cancel

4. You may delete a note that was previously entered by clicking on the post-it symbol with a red circle. A pop up box will as if you want to delete this note. Select Delete Note or Cancel.

5. You may edit a note by clicking the post-it symbol with the pencil icon. Click Save when you are done editing.

Option 2:

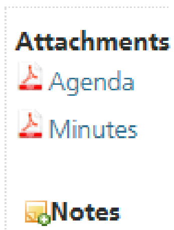
1. Open your meeting, from the left side of the screen select the item you would like to add a note to.
2. Find the image to the right of Notes on the meeting tool bar. The image looks like a post-it note with a small plus sign.



3. Click on this image; a new window will pop up that allows the user to enter a note.
4. Click save, the note is added and the user is taken back to the meeting. Click Cancel to cancel note and return to meeting.

Option 3:

1. Open your meeting.
2. On the right side you will see the word Notes and symbol that looks like a post-it note with a small plus sign.



3. Click on this image; a new window will pop up that allows the user to enter a note.
4. Click save, the note is added and the user is taken back to the meeting. Click Cancel to cancel note and return to meeting.

Important: Notes created in Agenda Online are only accessible by the user who created the note. You may add as many notes as you would like to any agenda item. Notes may be deleted.

Meeting Toolbar: Tools

Meeting Links

Users assigned to Agency Administrator or Meeting Manager Roles may create links to other websites that are important to your Agency.

To access links during a meeting:

1. Hover over Tools from the Meeting Toolbar.
2. Two options will drop down.
3. Hover over Meeting Links.
4. The links available will open to the right.

5. Click on the link you would like to access.

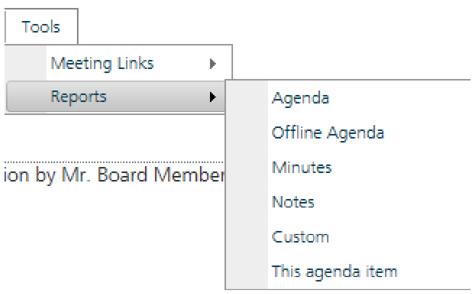
6. The device you are using will determine how the link is opened.

Meeting Toolbar: Reports

Although the idea with Agenda Online is to go paperless, there are still some users that may want to have a paper copy. We have conveniently located all printing options in the meeting toolbar.

To access the reports:

1. Hover over Tools on the Meeting Toolbar.
2. Two options will drop down.
3. Hover over reports.



4. All options will be displayed to the right of reports.
5. Click on the report you would like to open and or print.

Agenda

Select Agenda to open a printable version of the Agenda which can be exported to Pdf or Word format for customization. Select the check box for Outline only, if you prefer this option. This Agenda does not include attachments.

Offline Agenda

This tool can be used to create an offline version of the agenda to view the entire Board Packet without internet access. It can also be used during a meeting, should the Internet connection be lost.

To create an Offline Agenda:

1. Click on Offline Agenda.
2. A new window will appear, click on Download Offline Agenda with Attachments Zip File.
3. You can choose to open the file or save as to save to your computer.

4. The Offline Agenda will appear in two sections. The attachments will be saved in a File Folder and the Agenda will save in an HTML document.

Minutes

Select minutes to print the minutes in a word document.

Notes

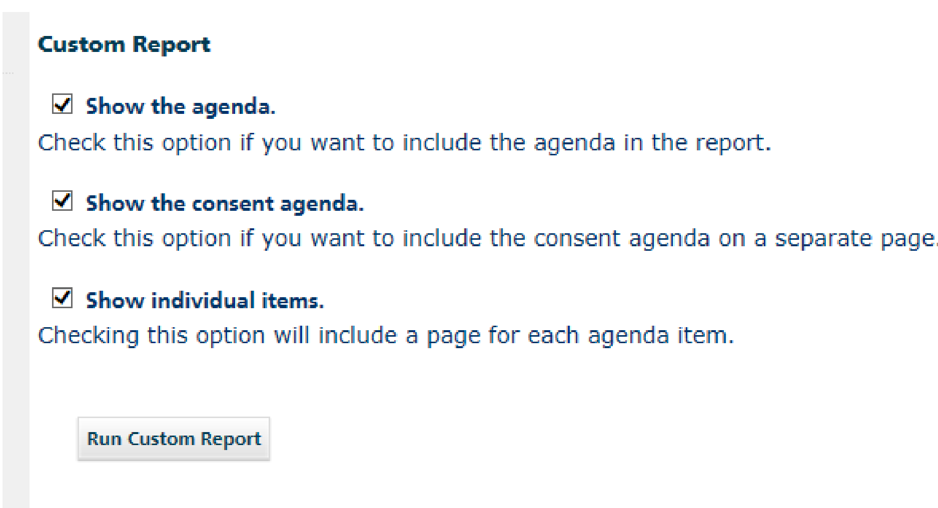
If you would like a printable version of the notes you have taken separated by agenda item select notes.

Custom

Print a Customer Report by selecting which features they want included in the report.

To create a Custom Report:

1. Click Custom.
2. Select the features you would like to include in the report.
3. Select Run Custom Report.



This Agenda Item

If you would like a single agenda item to be printed, select This Agenda Item.

Logging Out

When finished using Agenda Online it is important to sign out of the program. To sign out click the sign out from the quick links located in the top right of the page.