



Agenda*Online*

user guide

*This user guide can be used as a whole manual, or sections, depending on the user's access permissions to **AgendaOnline**.*

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AgendaOnline home page

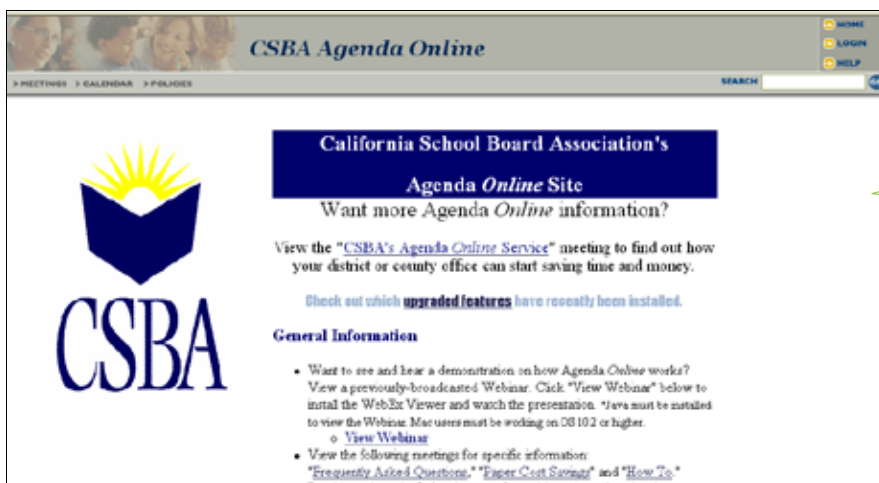
After connecting to your district's web page for **AgendaOnline** (AO), the site comes up in the "public" view.

General Features

Use the grey menu bar along the top of the screen to access meetings and information.

→ Meetings

Click **MEETINGS** to bring up the next scheduled meeting.



Home pages may be customized with district-specific information.

→ Calendar

Click **CALENDAR** to bring up a calendar for the current month. On the right side of the screen, a listing of meetings will appear for the eight months previous and eight months into the future of the current month.

Only meetings that have been published will appear on the calendar.

Click on a meeting from the list or from the calendar to access the agenda.



➔ Policies

Click **POLICIES** to bring up the GAMUT *Online* home page, a separate subscription service of the CSBA. Users must have a user ID and password to access GAMUT.

Other Features

➔ Home

Click **HOME** to return to the AO/district home page.

➔ Login



Click **LOGIN** in order to log in and view different AO features. Authorized staff or board members can enter a *User Name* and *Password* and click **SUBMIT** to log in. See further chapters for details on specific features available to authorized users.

➔ Help

Click **HELP** to access a PDF of the Users Guide. This guide will open in a new window.

➔ Search Field



The **SEARCH** feature allows user to search all published meetings for items on a specified keyword. The search looks at the following: meeting, section and item titles, and all fields on the item detail page. Results returned are ranked by the most relevant being displayed first; extra weighting is given to items with the keyword in the item's title.

To use the search feature:

1. Type a keyword in the search field and click **GO**.
2. Click the item hyperlink to view the item.
3. Clicking the meeting hyperlink will take you to the meeting agenda, not the specific item.
4. To narrow your search results by dates, enter start and end dates and click **SEARCH AGAIN**.



Progress	Item Title	Meeting Agenda
100%	Field Trip - Jefferson High Cheer Squad Meeting: 03/20/05 3:00 PM	Meeting Agenda
61%	Field Trips Meeting: 03/23/05 09:00 AM	Meeting Agenda
61%	Field Trips Meeting: 03/23/05 10:00 AM	Meeting Agenda
59%	Field Trips Meeting: 03/23/05 07:00 AM	Meeting Agenda Items

AgendaOnline

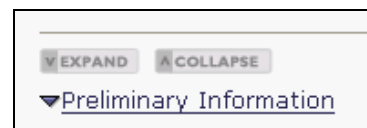
navigating agendas

By clicking on a meeting hyperlink under **CALENDAR** or clicking the **MEETINGS** link, you can view meeting agendas.

Viewing Complete Agendas

Collapsed agendas show only section headings. Expanded agendas show section headings with items listed underneath.

- Click **EXPAND** to open the entire agenda so all items beneath the agenda sections display.
- Click **COLLAPSE** to close up the entire agenda so only agenda section headings are displayed.



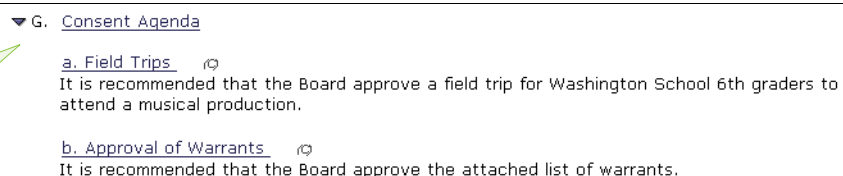
An agenda in expanded view.

Viewing Agenda Items

An underlined section heading indicates there are items under the section. Expand a single section in one of two ways:

- Click on the triangle ▼ to the left of the section.
- Click on an underlined title. ▼ G. Consent Agenda

The triangle next to Consent Agenda is pointing downwards, so items a and b are displayed.



Note: Items under the Closed Session section will only display the Title and Quick Summary/Abstract field, in compliance with open meeting laws, for the public view. Users with confidential item access will see expanded details.

Tip: To view other items on the agenda without going back to the main agenda screen, use the **NEXT ITEM** or **PREVIOUS ITEM** buttons.

Viewing Other Information

If an item title is underlined, there is more information available. Click on the underlined title to view the details.

➔ Attachments

The *Supporting Documents* area shows if there is an online document, an attached PDF document, or a hyperlink.

Note: Users need to have Adobe® Reader to view PDF documents.

- Click **DOWNLOAD NOW** to download the file in a separate window.
- Click on the name of the hyperlink to view it. A new browser window will open the specified link.



Optional Agenda Features

The bottom of each meeting agenda has two links: *Official Attendees* and *Goal Scorecard*. These links may or may not contain information, as it is dependant on the site's optional usage of these features.

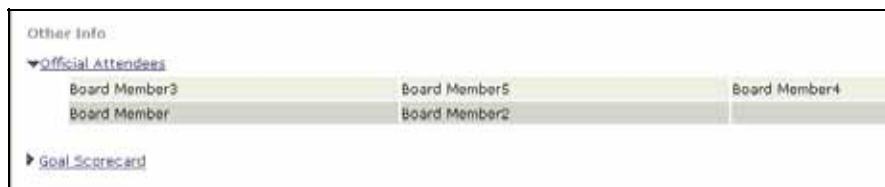
Other Info

- ▶ [Official Attendees](#)
- ▶ [Goal Scorecard](#)

➔ Official Attendees

The names of the official attendees of the meeting show under the *Official Attendees* link.

- To view the attendees of a meeting, click the arrow to the left of the *Official Attendees* title or click the title.



Note: No names will appear if the site does not use the minutes feature and/or the minutes have not been published.

➔ Goals Scorecard

The *Goal Scorecard* link will appear at the bottom of each agenda.

To view goals:

- Click on the arrow to the left of the *Goal Scorecard* title or click on the title itself to view which goals are addressed by the agenda being viewed.
- A list of goals will appear. To view which items on the agenda addressed each goal, click on the underlined title of the goal.



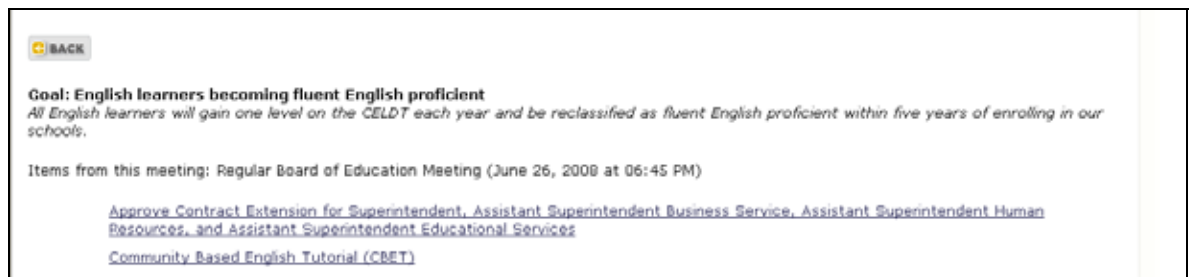
Other Info

▶ Official Attendees

▼ Goal Scorecard

This Meeting # of agenda items which address each goal for this meeting.	
1	Program Improvement
2	English learners becoming fluent English proficient
1	California Standards
1	Graduation
11	General District Business
1	Attendance

- The next screen will list each agenda item addressed by the goal. Click on the item title to view the item's details.



[BACK](#)

Goal: English learners becoming fluent English proficient
All English learners will gain one level on the CELDT each year and be reclassified as fluent English proficient within five years of enrolling in our schools.

Items from this meeting: Regular Board of Education Meeting (June 26, 2008 at 06:45 PM)

[Approve Contract Extension for Superintendent, Assistant Superintendent Business Service, Assistant Superintendent Human Resources, and Assistant Superintendent Educational Services](#)

[Community Based English Tutorial \(CBET\)](#)

Note: No goals will appear if the site does not use the goals feature.

AgendaOnline

quick overview

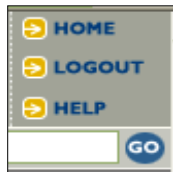
General Navigation

→ Log In



1. Click **LOGIN** from the home page.
2. Enter your *User Name* and *Password*. Names and passwords are case sensitive.
3. Click **SUBMIT** to enter **AgendaOnline**.

→ Log Out



Use the **LOGOUT** button in the upper-right side of the screen to leave the system. Using this feature will keep others sharing your computer from accessing AO.

→ Tools

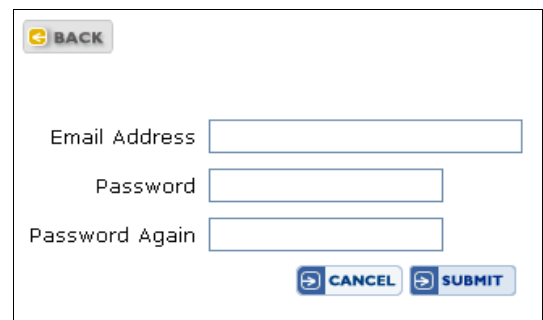
When an authorized user logs in, a new option, **TOOLS**, appears in the menu bar at the top of the screen. Click **TOOLS** to bring up the **GENERAL ADMINISTRATION** menu.

- **My Information** allows users to change their password.

The first time you log into **AgendaOnline**, or after having a password reset, you should change your password to something that is not guessable, yet easy to remember. To change your password:

1. Enter the new password in both password fields. The **Email Address** field can be left blank.
2. Click **SUBMIT** to change your password.
3. Click **CANCEL** to exit without changing the password.

Did you forget your password? Contact your meeting administrator to reset forgotten passwords. The meeting administrator can only reset passwords and is unable to see the user's current password.



Specific Agenda Functions

Some of the following features may be viewable to some and not others. If you see a feature you cannot access, contact your Meeting Administrator.



➔ Accessing Meetings

Click **MEETINGS**, located along the top menu bar, to bring up the most currently published meeting agenda. Click **CALENDAR** to bring up a list of all meetings.

- In the **MEETINGS** view, click the back or forward arrows on the meeting header to view a different meeting.
- To view a full agenda, click **EXPAND** to see section titles and item details.
- Click **COLLAPSE** to view only agenda section titles.



Sticky Notes

Sticky notes allow users to make notes regarding the entire agenda, a section of the agenda, or specific items on the agenda. Sticky notes are only viewable while you are logged in. No one else can see your notes.

A sticky note with a check  indicates that a note exists.

To create a note:

1. Click on the appropriate sticky note to view the *Personal Note* screen.
2. Type the contents of the sticky note.
3. Click **SAVE AND CLOSE** to save and return to the agenda. The screen will refresh and a check mark will appear on the sticky note icon.
4. Click **DELETE** to delete a note.

Note: If the **CANCEL**, **SAVE**, and **CLOSE** buttons do not appear on the screen, scroll down in the window to access them. Just closing the window will not save the note.



Sticky Note Print Feature



To print a single item detail with sticky notes, click the **PRINTABLE VERSION** button with the sticky note in the upper-right corner of the item detail screen.



To print an entire agenda with sticky notes, click the **PRINTABLE VERSION** button, then check the box to *Show Sticky Notes*.

1. The printable page will open in a new window.
2. Use the *File* menu to print.
3. Close the window to return to the agenda.

Note: You must turn on your internet browser's background printing option for stickys to print with the yellow or grey bar

Closed Session Items

Some authorized users can have access to closed session item details not available in the public view.

- If there is not an underlined item title hyperlink to click on, you do not have access to the information.
- If you do have a hyperlink, click on it to display the item detail which includes links to any attachments.

▼ F. Closed Session

a. Student Expulsion 09-05

b. Student Expulsion #08-05 pursuant to Education Code 48918 Time Certain: 08:00 PM

c. Conference with Property Negotiator pursuant to Government Code 54956.8
Negotiators: For the district: Jacob Dillsworth, CBO, Alex Jameson, District Attorney; For Wilson Properties: Fred Wilson, President and Marcia Thomas, Vice President
Property: 2568 Schoolbook Drive

BACK May 19, 2006 Training Meeting of the XY2 School District 7. Closed Session

a. Student Expulsion #08-05 pursuant to Education Code 48918 Time Certain : 08:00 PM EDIT

PREVIOUS ITEM NEXT ITEM

EXPAND COLLAPSE

▼ Rationale

From CSBA's **BB 9321 Closed Session Purposes and Agendas**

*The Board shall meet in closed session to consider the expulsion of a student, unless the student submits a written request at least five days before the date of the hearing that the hearing be held in open session. Regardless of whether the expulsion hearing is conducted in open or closed session, the board may meet in closed session for the purpose of deliberating and determining whether the student should be expelled. (Education Code 48918)

Note: Although Government Code 54954.2 requires the agenda to have a brief general description of all closed session items to be discussed, Government Code 54954.5 provides no specific description of agenda items related to closed sessions authorized by the Education Code. Since the purpose of conducting the closed session is to protect student privacy rights, the following optional paragraph provides that student names shall not be included on the agenda.

Agenda items related to student matters shall briefly describe the reason for the closed session, such as "student expulsion hearing," "grade change appeal," without violating the confidentiality rights of individual students. The student shall not be named on the agenda, but a number may be assigned to the student in order to facilitate record keeping. The agenda shall also state that the Education Code requires closed sessions in these cases in order to prevent the disclosure of confidential student record information.

▼ Supporting Documents

Student Expulsion 10_04 DOWNLOAD NOW

Expanded information of Section F, item b.

- Click **DOWNLOAD NOW** to download the supporting document.
- To view the next item on the agenda, without going back the main agenda screen, click **NEXT ITEM**.

➔ Accessing the Calendar

Clicking **CALENDAR**, located along the top menu bar, brings up a current month calendar. The right side of the screen lists meetings for the eight months previous and into the future of the current month.

The screenshot displays a web interface titled "Meeting Calendar & List". On the left, there is a calendar for August 2007. The calendar shows days of the week (Sun to Sat) and dates from 1 to 31. On the right, there is a list of meetings with columns for "Date" and "Name". The date range for listed meetings is 12/21/2006 to 04/22/2008. The meeting list includes various board meetings such as District Board Meeting, County Board Meeting, and Social District Board Meeting.

Date	Name
Aug 15, 2007	District Board Meeting
Jul 12, 2007	County Board Meeting
Jul 12, 2007	District Board Meeting
Jun 21, 2007	District Board Meeting
Jun 21, 2007	County Board Meeting
Jun 07, 2007	District Board Meeting
May 09, 2007	Social District Board Meeting
May 24, 2007	District Board Meeting
May 24, 2007	County Board Meeting
May 30, 2007	District Board Meeting
Apr 26, 2007	District Board Meeting
Apr 26, 2007	County Board Meeting
Apr 12, 2007	District Board Meeting
Mar 22, 2007	County Board Meeting
Mar 22, 2007	District Board Meeting

- To access meetings that may have been created earlier or later, use the arrows on the top of the calendar to move to a different month or year. The calendar will adjust the meeting list accordingly.
- To access a meeting, click on the date hyperlink on the meeting list or the hyperlink on the calendar.

➔ POLICIES Menu

Click **POLICIES**, located along the top menu bar, to bring up the GAMUT Online home page, a separate subscription service of CSBA. Users must have a user ID and password to access GAMUT.

Timing Out

AgendaOnline will log you out if you leave it inactive for an extended period of time.

Click **HOME** to return to the homepage and log in.

If this happens frequently, contact CSBA to increase the length of time before a session times out.

The screenshot shows a web page with a navigation bar at the top containing "MEETINGS > CALENDAR > POLICIES" and a search box with a "GO" button. The main content area is mostly blank, with a red message in the center: "Your session has expired due to inactivity. Please log in again."

AgendaOnline printing

To print an agenda or minutes, use the  menu on the upper right-hand side of the screen.

Printing Options

➔ Agendas and Abstracts

The information displayed under the item title is an abstract. In the example below, the information starting with “Negotiators:” is the abstract. Not all items will include abstracts.

“The agenda shall provide members of the public the opportunity to address the Board on any agenda item before or during the Board’s consideration of the item. The agenda shall also provide members of the public an opportunity to testify at regular meetings on matters which are not on the agenda but which are within the subject matter jurisdiction of the Board. (Education Code 35145.3; Government Code 54954.3)”

- A. Call to Order
- B. Roll Call
- C. Pledge
- D. Approval of Agenda
- ▶ E. Approval of Minutes
- ▼ F. Closed Session
 - a. Student Expulsion 09-05
 - b. Student Expulsion #08-05 pursuant to Education Code 46918 Time Certain: 08:00 PM
 - c. Conference with Property Negotiator pursuant to Government Code 54956.8
Negotiators: For the district: Jacob Dillsworth, CBO, Alex Jameson, District Attorney; For Wilson Properties: Fred Wilson, President and Marcia Thomas, Vice President
Property: 2568 Schoolbook Drive

In this agenda, section F, item c is an example of an item that has abstract information.

1. Under the **PRINTABLE VERSION** menu, click **AGENDA**.
2. Check the *Include Abstracts* box so the information in the *Quick Summary/Abstract* field will be displayed and printed. Check *Use Condensed Spacing* to eliminate unneeded lines between sections

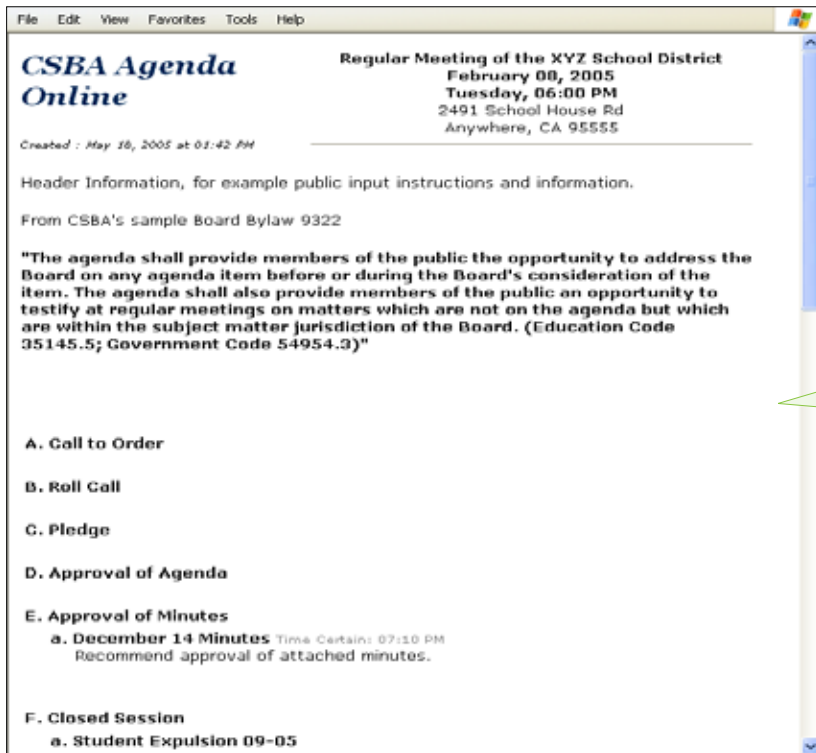
Print Options

Include Abstracts (if available)

Use Condensed Spacing

3. Click **GENERATE PRINTABLE VERSION** to open a new window with the printable agenda.

4. Print the agenda from the *File* drop-down menu or right click to find the Print option.



The print agenda screen will open in a new window.

5. Close the print agenda window to return to **AgendaOnline**.

➔ Minutes

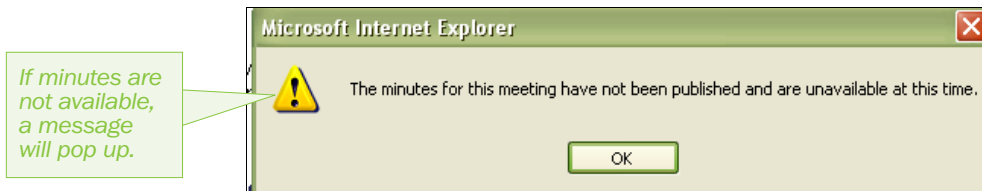
If minutes have been recorded and published for a meeting, they can be printed as well.

1. Click **MINUTES** under the **PRINTABLE VERSION** menu.
2. If minutes are available, they will open in a new screen.




3. Use the *File* menu or right click in the open window to print the minutes.
4. Close the minutes window to return to **AgendaOnline**.

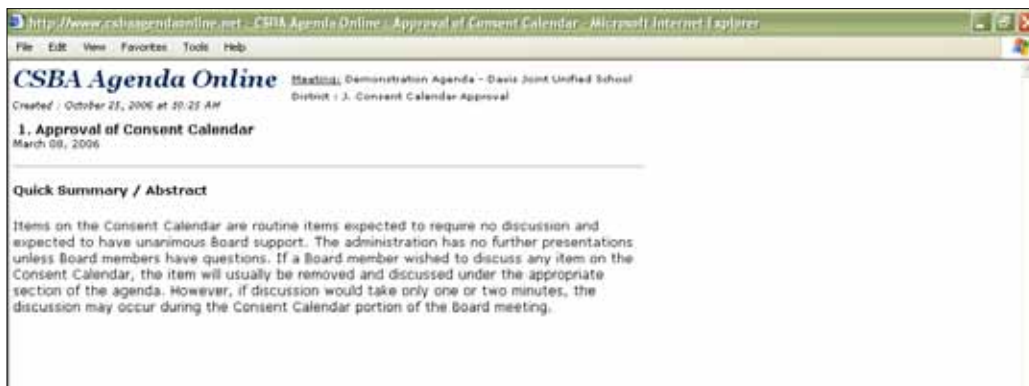
Alternatively, you can copy and paste the minute's window contents into a word processing program for editing or printing.



➔ Item Details

AgendaOnline allows users to print details for a particular item without printing the entire agenda.

1. Open an agenda item by clicking on the underlined hyperlink.
2. Click the  **PRINTABLE VERSION** button in the upper-right side of the page. A new window will open with the item information.
3. Use the *File* menu or right click in the open window to print the item detail.
4. Close the window to return to **AgendaOnline**.



Note: Closed session items will only print for users with access to confidential items.

➔ Attached Documents

To print attached documents, open the document and use the Adobe® viewer or *File* menu print feature to print the document.

board member access

Board members and other authorized users have additional **AgendaOnline** features not available in the public view.

Agenda Functions

→ Meetings

Click **MEETINGS** to display the most current posted meeting.



Sticky Notes

Sticky notes allow you to make notes regarding the entire agenda, a section of the agenda or a specific item on the agenda.



To create a note:

1. Click on the appropriate sticky note.
2. Type the contents of the sticky note.
3. Click **SAVE** and **CLOSE** to save and return to the agenda. The screen will refresh and a check mark will appear on the sticky note in the agenda.
4. Click **DELETE** to delete a note.

A sticky note with a check  indicates that a note exists.

Note: If the **CANCEL**, **SAVE**, and **CLOSE** buttons do not appear on the screen, scroll down in the window to access them. Just closing the window will not save the note.

Closed Session Items

Board members have access to closed session item details not available in the public view. Click on the underlined hyperlinks to display the item detail and/or attachments.

▼ F. Closed Session 

a. Student Expulsion 09-05 

b. Student Expulsion #08-05 pursuant to Education Code 48918  Time Certain: 08:00 PM

c. Conference with Property Negotiator pursuant to Government Code 54956.8 
 Negotiators: For the district: Jacob Dillworth, CBO, Alex Jameson, District Attorney; For Wilson Properties: Fred Wilson, President and Marcia Thomas, Vice President
 Property: 2568 Schoolbook Drive

Click **DOWNLOAD NOW** to download the supporting document.

Feb 08, 2005 : Regular Meeting of the XYZ School District : Closed Session

Student Expulsion #08-05 pursuant to Education Code 48918

Time Certain : 08:00 PM

PREVIOUS ITEM NEXT ITEM

EXPAND COLLAPSE

▼ Rationale

From CSBA's **BB 9321 Closed Session Purposes and Agendas**

*The Board shall meet in closed session to consider the expulsion of a student, unless the student submits a written request at least five days before the date of the hearing that the hearing be held in open session. Regardless of whether the expulsion hearing is conducted in open or closed session, the Board may meet in closed session for the purpose of deliberating and determining whether the student should be expelled. (Education Code 48918)

Note: Although Government Code 54954.2 requires the agenda to have a brief general description of all closed session items to be discussed, Government Code 54954.5 provides no specific description of agenda items related to closed sessions authorized by the Education Code. Since the purpose of conducting the closed session is to protect student privacy rights, the following optional paragraph provides that student names shall not be included on the agenda.

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▼ Supporting Documents

Student Expulsion 10_04 **DOWNLOAD NOW**

Tip: To view other items on the agenda, without going back the main agenda screen, use the **NEXT ITEM** or **PREVIOUS ITEM** buttons.

Tools Menu

When an authorized user logs in, a new option, **TOOLS**, appears in the menu bar at the top of the screen. Click **TOOLS** to bring up the **GENERAL ADMINISTRATION** menu.

- Click on *My Information* to change your password.

Print Features

To print individual item details with sticky notes:

1. Click the **PRINTABLE VERSION** button with the sticky note in the upper-right corner of the item detail screen.



2. The printable page will open in a new window.

CSBA Agenda Online **Meeting:** Regular Meeting of the XYZ School District : Approval of Minutes

Created : September 28, 2005 at 09:32 AM

December 14 Minutes

February 06, 2005

Time Certain: Dec 04, 2004 07:10 PM

Quick Summary / Abstract

Recommend approval of attached minutes.

Associated File Attachments

Minutes December 14 (Files)

Minutes (Files)

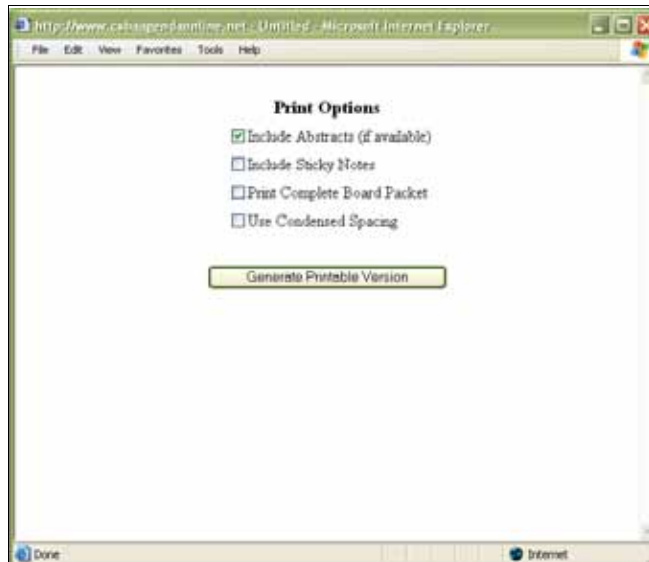
Sticky Note : This is my sticky note.

3. Use the *File* menu or right click to print.
4. Close the window to return to the agenda.

Note: You must turn on your internet browser's background printing option for stickys to print with the yellow or grey bar.

To print an entire agenda:

1. Click AGENDA under **PRINTABLE VERSION**.



2. Select any of the following print options, then click **GENERATE PRINTABLE VERSION**:

- *Include Abstracts* prints summaries under item titles
- *Include Sticky Notes* includes sticky notes with the agenda. In order for sticky notes to print in color or with a grey background, enable your browser's background printing picture.
- *Print Complete Board Packet* prints all item details (if applicable). Attachments must be printed separately.
- *Use Condensed Spacing* prints on less paper and eliminates unneeded blank lines.

agenda item submitters

Staff may be given authorization to submit agenda items.

Submitting an Item

Submitted items do not appear on the agenda until they are approved by an authorized user who reviews and approves submitted items.

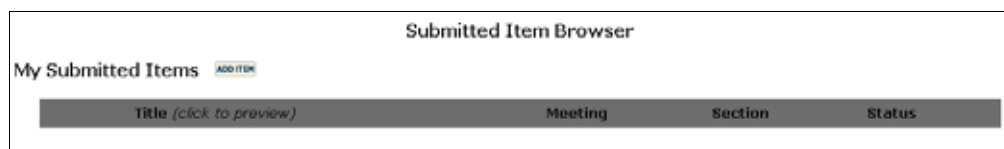
→ Tools Menu

To submit an item for an agenda:

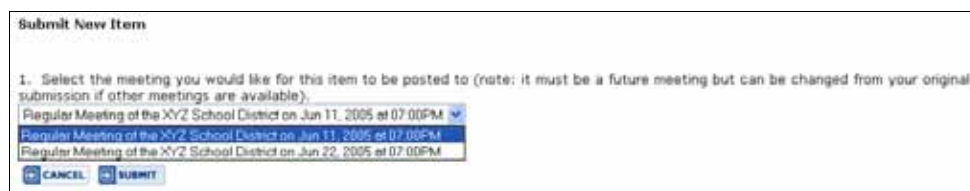
1. Click on **TOOLS**.
2. Click on Submitted Items to view the *Submitted Item Browser* screen.



3. Click on the **ADD ITEM** button.



4. Choose the appropriate meeting from the drop-down list and click **SUBMIT**.



5. Choose a section of the agenda to post the item and click **SUBMIT**.
6. When the *Item Inspector* screen appears, enter data in the necessary fields.

➔ Item Inspector Screen

The *Item Inspector* screen displays all the fields available for user input. Entering information in every field is not required.

The screenshot shows the 'Item Inspector' interface. At the top left is a 'BACK' button. Below it is a 'PREVIOUS ITEM' button. The main area is titled 'ITEM' and contains a large text field with 'Untitled Item'. Below this is the 'Visibility' section, which includes a 'DO NOT USE' checkbox, a 'Reason' text field, and a 'Limited / Board View (general public sees only title)' checkbox. The 'Section' dropdown menu is set to 'Adjournment'. Below the section are 'EXPAND' and 'COLLAPSE' buttons. A 'Requested Action' section is visible with a large text area. On the right side, there is a 'Ready for Meeting' checkbox, a 'PREVIEW ITEM' button, and a date field set to 'June 11, 2005'. Below these are checkboxes for 'Can Vote', 'Discussion Item', and 'Consent Item'. At the bottom right, there is a 'Time Certain' checkbox and a time selection field showing '01:00 PM'. A green callout box points to the 'DO NOT USE' checkbox with the text: 'Caution: Do not check the DO NOT USE box under Visibility; using this feature violates state open meeting laws.' At the bottom left, there is an 'OPEN HTML EDITOR' button.

Note: The *Can Vote* text can be changed to *Action Item*. Contact CSBA to request this change.

- Large text fields may be formatted and spell checked with the **OPEN HTML EDITOR** button. For more information on this feature, see the HTML Editor section later in this chapter.
- Check the *Limited/Board View* check box under *Visibility* to designate a closed session item. Even though the item may be placed on the agenda under a section named *Closed Session*, the check box needs to be clicked.
- For votes to be recorded, the *Can Vote* check box must be checked.
 - A (V) will appear next to the item on the agenda and a voting ballot will appear for the minutes taker.
- The *Discussion Item* and *Consent Item* check boxes may also be used with appropriate items.
 - If *Discussion Item* is checked, a (D) will appear next to the item on the agenda.
 - If *Consent Item* is checked, a (C) will appear next to the item on the agenda.
- The *Time Certain* check box allows the user to input a time when the agenda item is supposed to take place during the meeting. *Time Certain* and the time entered will appear next to the agenda item.

A collapsed view of the Item Inspector screen shows all available input fields.

- Scroll down the *Item Inspector* screen to view other fields that are available for input.
- After inputting all information, click **SAVE** to save the information and keep the *Item Inspector* screen displayed.
- Click **SAVE AND CLOSE** to save and exit.

➔Attaching Supporting Information

1. Save the information on the page.
2. Scroll down and expand the *Supporting Documents* field with the triangle (if it is not already expanded).
3. Click **ATTACH FILE/HYPERLINK**.
4. Choose the type of attachment.

What do you want to attach to this item?

An Online Document This is for simple text-based documents that you can either type or paste in along with a title and author name.

An Uploaded File This is for large and/or graphic intensive documents and files that cannot be expressed as plain text. This can include spreadsheets, Word, and PowerPoint documents though it is highly recommended that you convert those formats to [Adobe PDF](#) (Portable Document Format) .

A Hyperlink This allows you to create a link to an existing resource on the web. A good trick is to open a new window in your web browser, navigate to the resource you wish to include and copy the URL ("http://....") out of the location bar of you browser and paste it into the 'Link' field on the following page.

- Click *An Online Document* to add simple text-based information by typing or copying and pasting text. If you paste information, formatting will be lost.

- Click *An Uploaded File* to attach a file.

- Click *Browse* to select a file to be uploaded. [CSBA recommends converting files to be uploaded into PDF format to protect data and make the file accessible to all downloaders.]
- Click **SUBMIT** to save the file to the agenda.
- In the *Display Name* field, choose a name for the file to replace “untitled”.

- Searches do not search contents in attached documents; therefore, a *Keywords* field has been provided. If desired, enter a keyword (or multiple keywords, separated by spaces).
- Click **SUBMIT**.
- Click *A Hyperlink* to create a link to an existing web resource.
 - Enter a title in the *Label* field.
 - Paste or type the URL in the *Link* field.
 - Click **SUBMIT**.

Check to make sure all supporting documents have been added by going back to the *Item Inspector* page.

- Click **DOWNLOAD NOW** or *Test* to view the attachments /hyperlinks.
- Click **DELETE** to delete an attachment/hyperlink.

Items may be edited or deleted by the submitter until they have been approved for the meeting. Once an item is approved for an agenda, only those with access to edit the agenda can make revisions.

➔HTML Editor

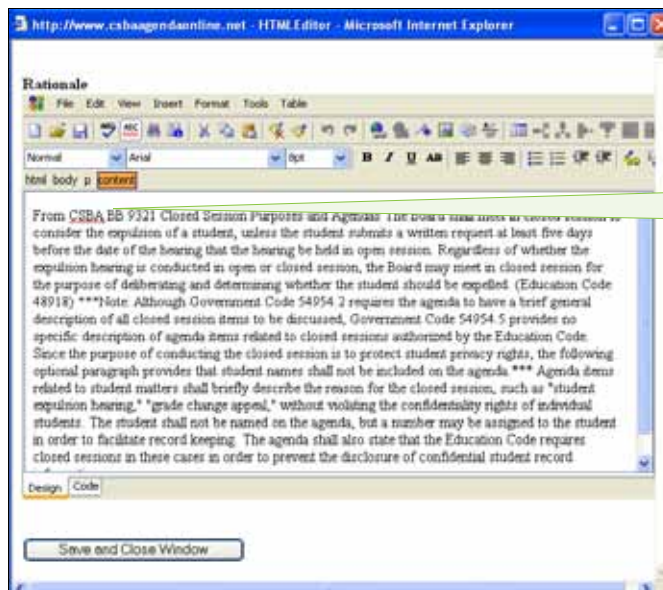
Some text fields on the *Item Inspector* page have an **OPEN HTML EDITOR** button. These fields can contain special formatting and can be spell checked.

To use the editor:

1. Before, during, or after typing in text, click the **OPEN HTML EDITOR** button. A separate window will open. The page will take a few seconds to load.

Note: You may be asked to trust a security certificate from Ephox, the editor licensing company. If you click **YES**, you will be asked to trust the certificate at the beginning of each editor session. If you click **ALWAYS**, you will not be asked again, unless there are updates.

2. Use any of the editor features to perform functions such as: numbering/bulleted, spell checking, centering, bolding or underlining text. To get suggestions for an underlined word, highlight the word and click the spell check button in the toolbar.



3. Click **SAVE AND CLOSE WINDOW** to save any changes you have made in the editor window. To discard changes, close the window without clicking **SAVE AND CLOSE WINDOW**.
4. After closing the editor window you will be returned to the *Item Inspector* page. HTML codes are included in the character count for the field, will be inserted with the text in the field(s) and are only seen on the *Item Inspector* page.

▼Rationale


```
<p>From CSBA's <b>BB 9321 Closed Session Purposes and Agendas</b></p>
```

```
<p>&quot;The Board shall meet in closed session to consider the expulsion of a student, unless the student submits a written request at least five days before the date of the hearing that the hearing be held in open session. Regardless of whether the expulsion hearing is conducted in open or closed
```

OPEN HTML EDITOR

HTML coding in the *Item Inspector* field.

CAUTION: If you enter too many characters in a limited character field, the information entered will not save. Refer to the *Item Template Inspector* section of the *Meeting Administrator* chapter for details about field limitations.

5. Click **SAVE** or **SAVE AND CLOSE** at the bottom of the page to save any changes.
6. Once you have saved the changes you can view the results of the formatting by clicking .

Note: Field names may be customized for your district; contact CSBA for assistance.


Resubmitting an Item

Items on agendas can be resubmitted to another, future agenda. Resubmitted items do not appear on the agenda until they are approved by an authorized user who reviews and approves submitted items from the *Submitted Item Browser*.



The screenshot shows a web interface for managing agenda items. At the top, there is a section header 'X. Actions Items' with an 'ADD ITEM' button. Below this, a list of items is displayed. The first item is '1 a. Loomis Basin Charter School Report', with a sub-note 'report would be attachment to this item'. To the right of the item title, there are three buttons: 'EDIT', 'COPY', and 'RESUBMIT'. A yellow folder icon is also visible next to the item title.

To find an item to resubmit to a future agenda:

1. Find the item to be resubmitted by performing a search to find the item and/or finding the item on an agenda from the calendar list.
2. To the right of the item title, click the  button.
3. Choose the appropriate meeting from the drop-down list and click **SUBMIT**.
4. Choose a section of the agenda to post the item and click **SUBMIT**.
5. Make any necessary changes to the Item Inspector screen.

***Note:** Resubmitted items do not carry over any attachments.

The item now appears in the *Submitted Item Browser*.

6. Click **SAVE AND CLOSE**.

If an item is resubmitted to a section and/or a section which has had a modified item template that does not have the same fields, there may be some fields which do not appear on the item inspector page, but will show on the full item details when viewed or printed. Contact your meeting administrator to make adjustments to the item template for that section.

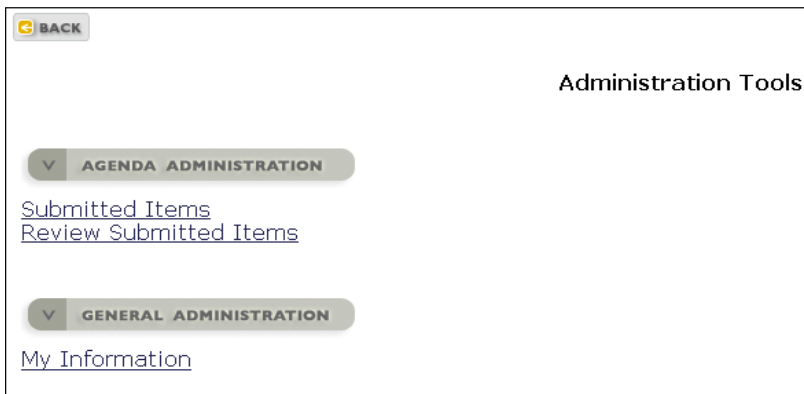
Submitted agenda items must be approved by an authorized reviewer before they appear on the meeting agenda.

agenda item reviewers

Reviewing an Item

→ TOOLS Menu

Click *Review Submitted Items* under **AGENDA ADMINISTRATION** to enter the *Submitted Item Browser*.



A list of submitted items will appear. Depending on preferences set by the meeting administrator, you may or may not have all the features described. Reviewers can view submitted items and may have rights to delete, approve, modify and edit.

Reviewing Submitted Items

From the **TOOLS** page, click *Review Submitted Items*. The *Submitted Item Browser* lists all items submitted to different meetings.

Sort the page by clicking on the underlined column titles (*Title*, *Submitter*, *Meeting*, *Section*, and *Status*) along the grey bar.

Submitted Item Browser				
My Submitted Items				
Title	Submitter	Meeting	Section	Status
Board Agenda - Service Agreements with CUSA		Regular Meeting of the Board of Trustees August 29, 2000 09:00:00 AM	Consent	Not Approved
Board Items - Material Audit		Regular Meeting of the Board of Trustees August 29, 2000 09:00:00 AM	Consent	Not Set
All Submitted Items				
Title	Submitter	Meeting	Section	Status
Board Agenda - Board Policy and Supervision, SRA, L...	Mr. Smith	Regular Meeting of the Board of Trustees, August 29, 2000 09:00:00 AM	Action Items	Ready for Board/Member Review

- Click on an item title to view the item details.
- Click *Delete* to delete the item.
- Click *Approve* to automatically add the item to the agenda. *Check with your meeting administrator before using the approve feature.
- Click *Modify* to change the meeting to which an item is submitted, take away the submitter's editing rights, and make changes to item details. This action is useful for a final review process.
- Click *Edit* to make changes to the item details while still retaining the submitter's edit rights.

CAUTION: *If you select a different agenda section that uses a different item template that does not have all the same fields as the original template, data may be lost.*

meeting administrator capabilities

Meeting administrators can create, edit and delete meetings, meeting templates and item templates. They may also be assigned to submit and review items. It is highly recommended that districts have more than one Meeting Administrator.

Creating and Editing Meetings

The **TOOLS** menu allows you to view the **AGENDA ADMINISTRATION** page; the starting point for all meeting administration duties.

➔ Meetings Link

To create, edit or delete a meeting, click **MEETINGS**. A screen will appear with a list of the meetings in **AgendaOnline**.

After clicking **TOOLS**, the **AGENDA ADMINISTRATION** page will appear.

AGENDA ADMINISTRATION

- Meetings
- Meeting Templates
- Item Templates
- Goals
- Submitted Items
- Review Submitted Items

Meetings

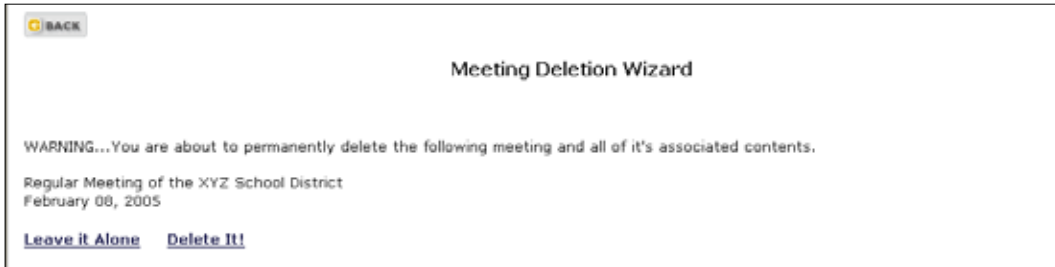
	Name	Date Time	Delete
+	Regular Meeting of the XYZ School District	Jun 22, 2005 07:00 PM Wed	DELETE
+	Regular Meeting of the XYZ School District	Jun 11, 2005 07:00 PM Sat	DELETE
+	CSBA's Agenda Online Service	Mar 31, 2005 06:00 PM Thu	DELETE
+	Reguar Meeting	Feb 25, 2005 06:00 PM Fri	DELETE
+	Special Meeting	Feb 25, 2005 06:00 PM Fri	DELETE
+	Regular Meeting of the XYZ School District	Feb 08, 2005 06:00 PM Tue	DELETE
+	California School Boards Association Board of Directors Meeting	Oct 16, 2004 09:00 AM Sat	DELETE
+	BMS Training Meeting	Aug 04, 2004 03:08 PM Wed	DELETE

Editing a Meeting

Click **EDIT** next to the meeting to edit. You can change any of the header information, section headings and order, or footer information.

Deleting a Meeting

Click **DELETE** next to the meeting you want to delete. The *Meeting Deletion Wizard* screen will appear.



BACK

Meeting Deletion Wizard

WARNING...You are about to permanently delete the following meeting and all of it's associated contents.

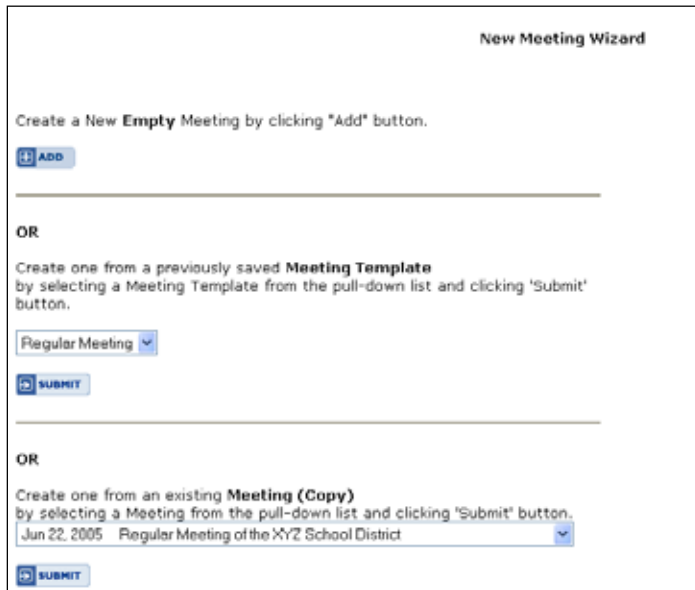
Regular Meeting of the XYZ School District
February 08, 2005

[Leave it Alone](#) [Delete It!](#)

- Click *Delete It!* to permanently delete the meeting.
- Click *Leave it Alone* to cancel deletion.

Adding a New Meeting

1. Click **ADD**.
2. The *New Meeting Wizard* page will appear.



New Meeting Wizard

Create a New **Empty** Meeting by clicking "Add" button.

ADD

OR

Create one from a previously saved **Meeting Template** by selecting a Meeting Template from the pull-down list and clicking "Submit" button.

Regular Meeting

SUBMIT

OR

Create one from an existing **Meeting (Copy)** by selecting a Meeting from the pull-down list and clicking "Submit" button.

Jun 22, 2005 Regular Meeting of the XYZ School District

SUBMIT

3. Choose one of the following options to create the meeting:
 - a. An *Empty Meeting* will not contain any information.
 - b. A *Meeting Template* will include the information stored in the template. See the “Creating a Template” section later in this chapter for more details.
 - c. Creating a *Meeting (Copy)* from an existing meeting will copy the entire meeting’s contents, including attachments.

Choosing any of these options will bring up the *Meeting Inspector* screen. The following pages will describe the fields on the *Meeting Inspector* page.

➔ Meeting Inspector Page Features: Heading Information

The screenshot shows the 'Meeting Inspector' interface. At the top left is a 'BACK' button. The title 'Meeting Inspector' is centered. On the right, there are 'PREVIEW MEETING' and 'REVISIONS' buttons. The form includes:

- Meeting Title:** A text input field containing 'Regular Meeting of the XYZ School District'.
- Meeting Date & Time:** A date/time picker showing 'Feb 08 2005' and '05:00 AM (PST)'.
- Location:** A text input field containing '2431 School House Rd' and 'Anywhere, CA 95555'.
- Header Info:** A text area containing HTML code: '<p>Header Information, for example public input instructions and information.</p>' and '<p>From CBA's sample Board Bylaw 5322</p>'.

Title of Field	Use
Meeting Title	Used to indicate the type of meeting being held; for example, Regular Meeting, Special Meeting. Length=128 characters
Meeting Date	Date the meeting is to be held.
Meeting Time	Time the meeting is to start.
Location of Meeting	Could include name of meeting location, along with the street address, room number, etc. Length=512 characters
Header Info	Shows as Preliminary on the agenda. This field is a place to put general meeting information. No character limit

➔ Meeting Inspector Page Features: Sections and Numbering

The screenshot shows the 'Sections' management interface. At the top, there are two dropdown menus: 'Section Numbering' with options 'A, B, C' and 'Item Numbering' with options 'a, b, c'. Below these is a table with the following columns: 'Order', 'Seq.', 'Label', 'Item Field Template', 'Unfold', and 'Delete'. The table contains ten rows of sections, labeled A through J. Each row has a small triangle icon for reordering, a 'Seq.' field, a 'Label' field, an 'Item Field Template' dropdown (all set to 'All'), an 'Unfold' checkbox, and a 'DELETE' button. The 'Closed Session' row (F) has its 'Unfold' checkbox checked. At the top and bottom of the table are 'ADD SECTION' buttons with '(Add at Top of List)' and '(Add at Bottom of List)' labels respectively.

Title of Field	Use
Section Numbering	A drop-down menu to choose the type of section numbering.
Item Numbering	A drop-down menu to choose the type of item numbering.
Sections	Titles may describe what is taking place at the meeting, such as: Call to Order or Pledge of Allegiance or describe the types of agenda items that will appear under it. Each section added has an item template associated with it which controls the fields that will appear for each item. Use the up and down triangles to reorder sections. Length=64 characters
DELETE	Deletes a section.
ADD SECTION	Adds a section at either the top or bottom of the agenda.
Unfold	If this box is checked, that agenda section will automatically appear in expanded format.

➔ Meeting Inspector Page Features: Footer Information

Footer Info

Static Snapshot

This will create static html files, folders and supporting images and files into a directory on the application server along with a .zip archive that users can download from the meeting page.

Attach Documents Additional Documents *(Make sure you save the item before adding files.)*

Press to use this meeting as a template for future meetings.

Title of Field	Use
Footer Info	Used to indicate the type of meeting being held; for example, Regular Meeting, Special Meeting. Use the OPEN HTML EDITOR button to open a new window where footer text can be spell checked and formatted. Length=2048 characters
Static Snapshot	Allows authorized users to create an offline version of the meeting. Only individuals authorized to access confidential items should be authorized to download a static snapshot. Static snapshots will not include sticky notes.
Attach Documents	Allows supporting documents or hyperlinks to be added to the meeting. Save the meeting before attaching a document.
Save as Template	Allows the meeting format to be saved as a template for future meetings. Once a meeting has been created the Meeting Administrator page will show new icons that allow items to be added, edited, copied and deleted. At this point, items may also be submitted by other users who have been given authorization.

Once a meeting has been created, the *Meeting Administrator* page will show new icons that allow items to be added, edited, copied and deleted. At this point, items may also be submitted by other users who have been given authorization.

Reviewing and Approving Submitted Items

From the **TOOLS** page, click *Review Submitted Items*. The *Submitted Item Browser* lists all items submitted to different meetings.

Sort the page by clicking on the underlined column titles (*Title, Submitter, Meeting, Section, and Status*) along the grey bar.

Submitted Item Browser								
My Submitted Items <small>ADD ITEM</small>								
		<u>Title (click item to preview)</u>	<u>Meeting</u>	<u>Section</u>	<u>Status</u>			
Modify	Delete	Service agreement with CSBA	Regular Meeting of Any Board of Trustees August 20 2009 09:00:00 PM	Consent Agenda	Supt. Approved			
Modify	Delete	warrant report	Regular Meeting of Any Board of Trustees August 20 2009 09:00:00 PM	Consent Agenda	Not Set			
All Submitted Items								
		<u>Title (click item to preview)</u>	<u>Submitter</u>	<u>Meeting</u>	<u>Section</u>	<u>Status</u>		
Delete	Approve	Modify	Edit	Approve Board Policy and Regulation 5144.1 - Suspension and Expulsion	Jim Smith	Regular Meeting of Any Board of Trustees 8/20/09 09:00:00 PM	Action Items	Ready for Superintendent Review
Delete	Approve	Modify	Edit	Field Trips	Jim Smith	Regular Meeting of Any Board of Trustees 8/20/09 09:00:00 PM	Action Items	Not Set
Delete	Approve	Modify	Edit	Service agreement with CSBA	Kim Ludwig	Regular Meeting of Any Board of Trustees 8/20/09 09:00:00 PM	Consent Agenda	Supt. Approved
Delete	Approve	Modify	Edit	warrant report	Kim Ludwig	Regular Meeting of Any Board of Trustees 8/20/09 09:00:00 PM	Consent Agenda	Not Set

- Click on an item title to view the item details.
- Click *Delete* to delete the item.
- Click *Approve* to automatically add the item to the agenda.

TIP: As items are approved they are added to the bottom of the agenda section. If you have a long list of items to approve and want to control the order in which they appear on the agenda, approve them in the order in which you would like them to appear.

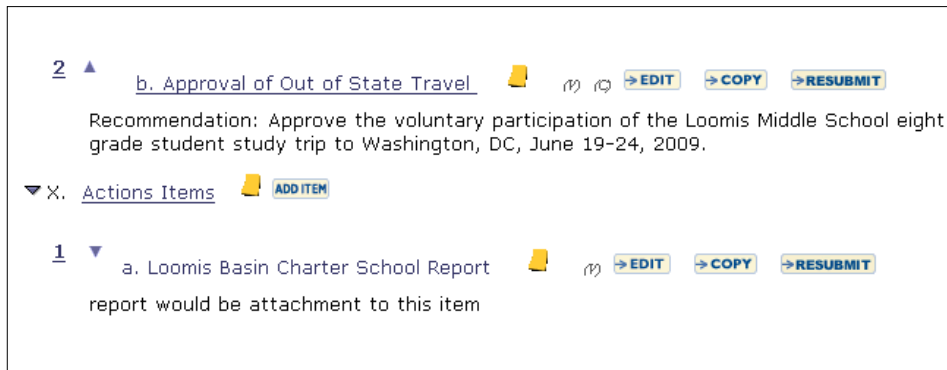
- Click *Modify* to change the meeting to which an item is submitted, take away the submitter's editing rights, and make changes to item details. This action is useful for a final review process.
- Click *Edit* to make changes to the item details while still retaining the submitter's edit rights.

CAUTION: If you select a different agenda section that uses a different item template that does not have all the same fields as the original template, data may be lost.

Adding Items to an Agenda

When a meeting administrator views a meeting there is an option to the right of each section to add an item to the agenda. This is different than submitting an item; adding an item in this location will put the item on the agenda automatically.

From the meeting agenda page, click **ADD ITEM** next to the appropriate section.



Editing Items

Once items have been added to an agenda, they can be edited, copied and deleted. Items approved by a reviewer will appear on the meeting agenda as a pending item.

- Click **EDIT** to open the item on the *Item Inspector* page. Edit any of the fields, delete the entire item, and/or check the item as “Ready for Meeting.”
- Click **COPY** to copy an item from one meeting to another or from one section to another. Copying brings all the item details and attachments to the new meeting or section.
- Click **RESUBMIT** to submit the item to the *Submitted Item Browser* to a future meeting. Resubmitted items do not carry over attachments.
- Refer to the Item Submitter chapter for instructions on using the *Item Inspector* page.

Moving Items

Items appear on the agenda in the order they were approved. There are two ways to move an item to a different spot within a section:

- Click the ▲ ▼ to the left of the item title to move an item up or down one spot at a time.

2 ▲ ▼ Pending-2. Removal of Item(s) from Consent Agenda or

- Click the underlined number (in this case, 2) to the left of the item title and arrows.
 - a. After clicking, the page will refresh and a text box will appear.
 - b. Click the text box and enter the number in which you want to move the item. (Note: Refer to the underlined numbers, not your custom item numbering.)
 - c. Click the Enter/Return key on the keyboard. The item will move, adjusting the numbering accordingly.

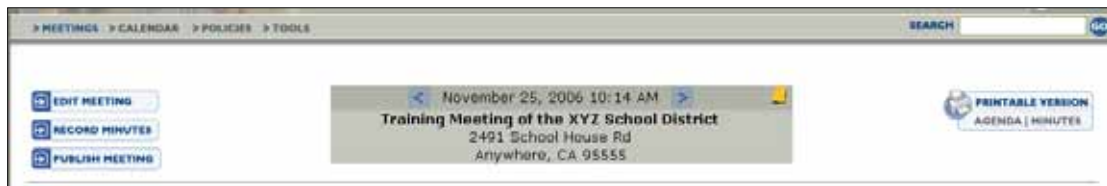
- If you enter a non-number, an error message will appear.

Error: A valid number was not entered. Renumbering was not completed. Please check your items and try again.

- o To delete the error, click the underlined number again.
- o Then, enter a valid number or perform another action, such as editing or viewing an item, editing the meeting, or navigate to another meeting.
- If you decide *not* to move an item's order after the text box appears, click the Enter/Return key on your keyboard without entering another number.

Publishing a Meeting

Meetings are not visible to all users until they are published.



1. Click **PUBLISH MEETING** on the meeting agenda page.
2. To make the agenda viewable to all and make all pending items viewable, the check boxes next to *Mark this meeting as "public"* and *Mark all attached agenda items "Ready for Meeting"* are automatically checked.
3. Click **SUBMIT** to publish the meeting.



Hiding a Meeting

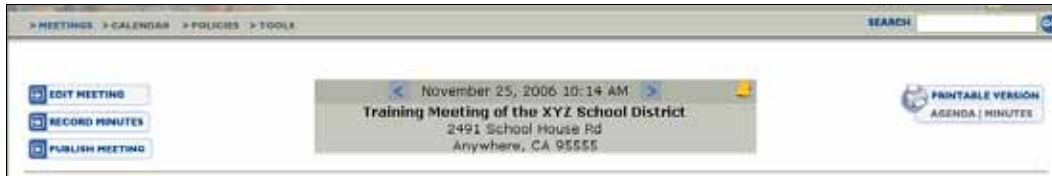
Meetings that are published can be hidden (unpublished). This action will take the meeting out of the public view and marks all items on the agenda as "pending."

1. Click **HIDE MEETING** on the upper-left side of the meeting agenda page.
2. The check box next to *Mark all attached agenda items "Pending" (not ready for meeting)* box is already pre-selected.
3. Click **SUBMIT**.



Minutes

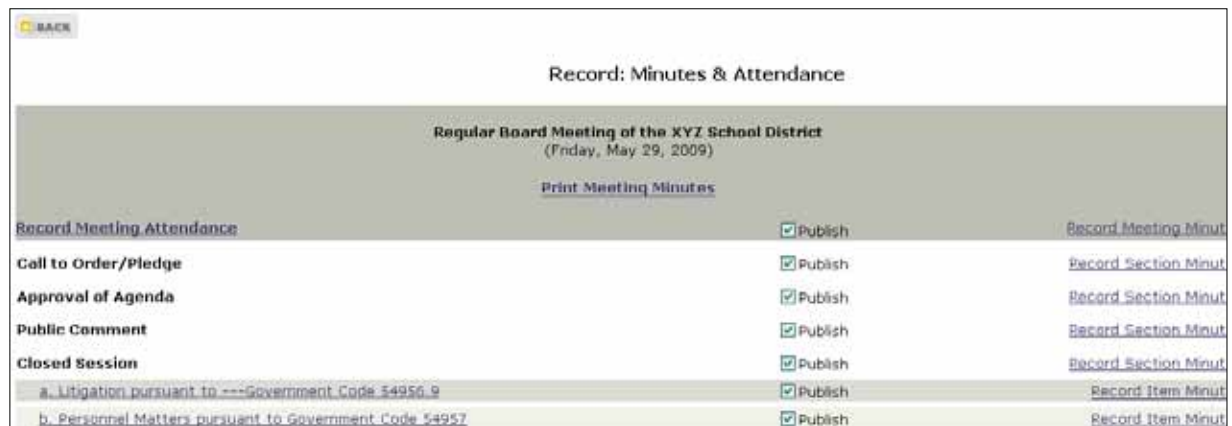
The meeting administrator or other authorized users can record meeting attendance, minutes and votes. After approval, minutes need to be published to be seen by all users. Note: If your district does not want to use the minutes feature, you may want to contact CSBA to delete the *Official Attendees* section of all agendas.



Recording Minutes

From the main meeting agenda page, click **RECORD MINUTES**.

Click *Record Meeting Attendance* to record attendees. These names show on the published agenda under the *Other Info, Official Attendees* section and on voting items. Recording attendance first will allow voting menus to appear for voting items.



Click on an item title to view item details.

Click *Record Item/Section Minutes* next to each item/section to record minutes.

- Enter text directly into the text box and/or use the HTML editor screen to format minutes.
- Click the **IMPORT RECOMMENDATION** button to import the recommended action into the minutes. (*This field may not be used or may have been renamed per your site's customized needs; contact CSBA for details.*)
- Click **SAVE** or **SAVE AND CLOSE** to save your input.



➔ Recording Votes

Board members marked as attending a meeting will show in the minutes window for voting items.

- Motions and votes can be recorded individually by clicking on the appropriate radio button next to the voter.
- If all board members vote the same, click **YES**, **NO** or **ABSTAIN** in the *Set All Votes To:* row.
- If no radio button is marked, votes will display as “No Vote.”

Votes							
Note: You must register a voter as an attendee before they will appear on the ballot.							
Reset Ballot							
Set All Votes To:	Motion Made By	Motion Seconded By	Yes	No	Abstain	Recuse	Not Present
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board Member	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board Member2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board Member3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board Member4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board Member5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NOTE: Currently a unanimous vote shows as “Unanimously Approved/Rejected.” Board member names can be listed with their votes, even if the vote is unanimous. Contact CSBA for details.

➔ Publishing Minutes

Check *Publish* next to a section to make minutes available to all users.

Discussion Items	<input type="checkbox"/> Publish	Record Section Minutes
a. School Boundary Changes	<input type="checkbox"/> Publish	Record Item Minutes
Adjournment	<input type="checkbox"/> Publish	Record Section Minutes
Publish all minutes		Unpublish all minutes

Use the *Click here to publish all minutes* link to publish the entire set of minutes for a meeting for public viewing. Use the *Unpublish all minutes* link to hide minutes from public viewing.

Templates

➔ Meeting Templates

Meeting templates can be created from existing meetings. Once the template has been created, it may be revised by clicking *Meeting Templates* under the **AGENDA ADMINISTRATION** menu.

Meeting Templates				
	Meeting Type Name	Default Time	Default Duration	Delete
<input type="button" value="EDIT"/>	Special Meeting	07:00 PM		<input type="button" value="DELETE"/>
<input type="button" value="EDIT"/>	Regular Meeting	07:00 PM		<input type="button" value="DELETE"/>

- Click **EDIT** to view the Meeting Template Inspector page. Edit the information on this page in the same manner as the *Item Inspector* page.
- Click **DELETE** to delete a template.

➔ Item Templates

Item templates control available fields for agenda items. Templates can be added and edited from the *Item Template* link under **AGENDA ADMINISTRATION**.

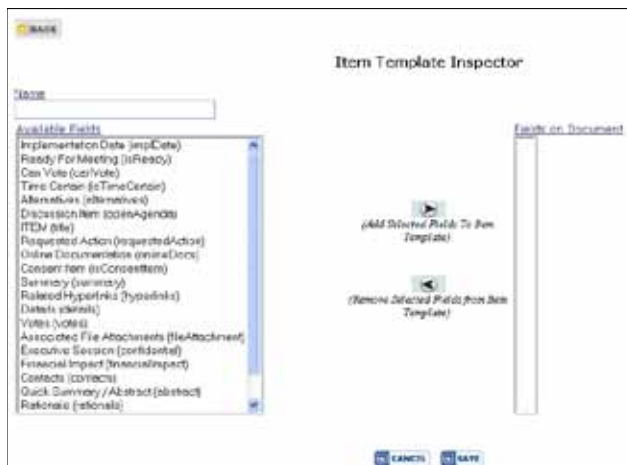
- Click **EDIT** to change an existing template.
- Click **ADD** to add a new item template.

Different types of information may be required for an item that is information only as compared to a consent or closed session item.

ADD	Type	Delete
EDIT	All	DELETE
EDIT	Financial Impact	DELETE
EDIT	Consent Item	DELETE
EDIT	Informational Item	DELETE
EDIT	Executive Session	DELETE
EDIT	Informational Items	DELETE
EDIT	Test Board Action	DELETE
EDIT	diannatest	DELETE

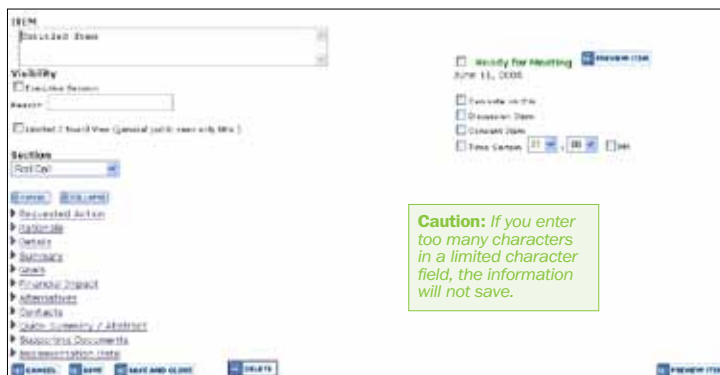
➔ Item Template Inspector

Add or delete fields by using the arrows in the center of the screen. Highlighting information and clicking the arrows moves items between the *Available Fields* and the *Fields on Document* column.



Note: If the item template has previously been used for agenda items, data could be lost if fields are deleted from an existing template.

Items will appear on the *Item Template Inspector* page in the following order, regardless of the order in which they are selected.



See the descriptions of item template fields below for more details on their use and placement on agendas.

Note: Some field names may be changed per your district's needs

Alternatives: Adds *Alternatives* input field of 512 characters on the item detail screen.

Associated File Attachments: Adds function to attach supporting documents. Links to attached documents appearing under *Supporting Documents* on the item detail screen.

Board Action Taken: Adds field for recording minutes.

Can Vote: Adds *Can vote on this item* check box. When box is checked, (V) appears next to the agenda item.

Consent Item: Adds *Consent Item* check box. When checked, (C) appears next to the agenda item.

Contacts: Adds *Contacts* input field of 512 characters on the item detail screen.

Details: Adds *Alternatives* input field of 2048 characters on the item detail screen.

Discussion Item: Adds *Discussion Item* check box. When box is checked, (D) appears next to the agenda item.

Executive Session: Adds *Visibility* section to the Item Inspector page; including check boxes for **DO NOT USE** and *Limited/Board View*. **Note:** *California districts will be in violation of the state's open meeting laws if they check the DO NOT USE box.*

Check *Limited/Board View* for closed session items. When checked, the *Title* and *Quick Summary/Abstract* fields will show on the agenda for all users. Further information is visible only to users having confidential items permission.

Financial Impact: Adds *Financial Impact* input field of 2048 characters on the item detail screen.

Goals: Adds a list of district goals, with check boxes, to the Item Inspector page. Goals boxes may be checked to indicate that an agenda item relates to a goal.

Implementation Date: Adds *Implementation Date* input field of 255 characters to the item detail screen.

ITEM: Automatically appears in Item Inspector page. This is the 1024 character input field for the title/description of the item.

Online Documents: Adds function to create supporting information online. Online documents appear under *Supporting Documents* on the item detail screen.

Quick Summary/Abstract: Adds *Quick Summary/Abstract* input field on the expanded agenda and may be printed with the agenda. There is not a limit to the number of characters in this field; however, the more information included, the longer it takes to display. For large amounts of information, attach a supporting document.

Rationale: Adds *Rationale* input field of 2048 characters on the item detail screen.

Ready for Meeting: Automatically included in Item Inspector. Creates a check box to mark whether the item is ready for the meeting.

Related Hyperlinks: Adds function to link to a specific web page. Hyperlinks appear under *Supporting Documents* on the item detail screen.

Requested Action: Adds *Requested Action* input field of 2048 characters on the item detail screen. Appears in minutes with *Import Recommendation* button.

Summary: Adds *Summary* input field on the item detail screen. No character limit; however, the more information included, the longer it takes to display. For large amounts of information, attach a supporting document.

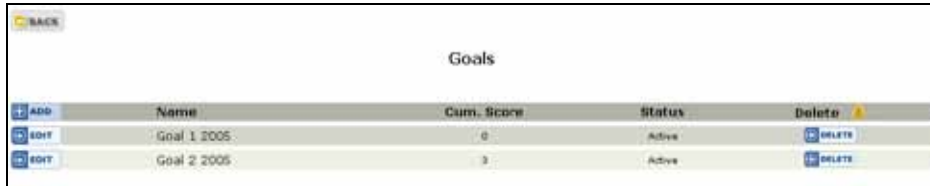
Time Certain: Adds *Time Certain* check box. When checked, a time can be input to indicate a specific time in the meeting that the item will be heard. The time entered will appear next to the item on the agenda.

Votes: Required field for recording votes when taking minutes.

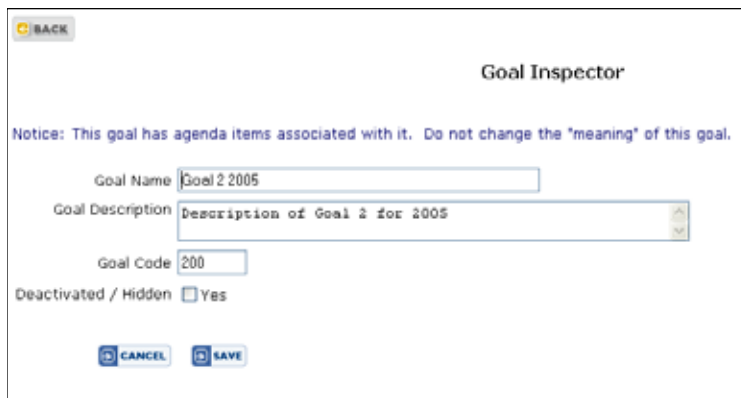
➔ Goals

District goals can be entered so agenda items can be related to a goal. When the goals feature is used, a *Goal Scorecard* will appear at the bottom of the meeting agenda showing how many agenda items have related to the specified goals.

Under **AGENDA ADMINISTRATION**, click *Goals*.



	Name	Cum. Score	Status	Delete
ADD	Goal 1 2005	0	Active	DELETE
EDIT	Goal 2 2005	3	Active	DELETE



BACK

Goals

ADD EDIT DELETE

Goal Name: Goal 2 2005

Goal Description: Description of Goal 2 for 2005

Goal Code: 200

Deactivated / Hidden: Yes

CANCEL SAVE

- Click **ADD** or **EDIT** to bring up the *Goals Inspector* page.
- Add or revise information.
- Click **SAVE** to return to the *Goals* page.

Caution! Goals from previous years may be hidden or deactivated, but should not be deleted if they have agenda items associated with them.

Managing Users

Meeting administrators have the ability to create new users, edit user preferences, and change users' passwords.

➔ Setting Up New User Accounts

To access user accounts, click on *Users* under **USER ADMINISTRATION**.

Click **ADD** to add a new user. Details about the fields on the User Inspector page appear on the following table.



Users

ABCDEFGHIJKLMNOPQRSTUVWXYZ ALL

ADD	Name	Expires	Voter	Roll	Id	Status	Delete
-----	------	---------	-------	------	----	--------	--------

➔ User Inspector fields

The screenshot shows the 'User Inspector' form with the following fields and options:

- User ID: [Text Input]
- Email: [Text Input]
- First & Last Name: [Text Input]
- Organization: [Text Input]
- Password: [Text Input]
- Password (Again): [Text Input]
- Expiration: [Text Input]
- Account is active
- User can vote
- Include in meeting roll call list
- Supervisor - Use carefully. This bypasses the Roles Engine and allows access to every part of the system.
- Role: [Dropdown Menu] (Selected: eAgenda)
- Buttons: [CANCEL] [SAVE]

User ID	Name the user will used when logging into AO. ID's are case sensitive.
Email	Will store the user's e-mail address. Caution: Field can be left blank. E-mail features are not available.
First & Last Name	Stores the user's name; this is the name that will be displayed when the user logs into AO.
Organization	Can be filled in or left blank.
Password and Password (Again)	The password must be entered twice; entries must match.
Expiration	AO will default a date; access will not be affected by this date.
Account is active	Check to make a user active; uncheck to deactivate a user.
User can vote	Check to have user's name appear on the roll call list while recording minutes and votes.
Include on meeting roll call list	If the check box for voting is checked, this will automatically be checked.
Role	The drop-down menu lists the available user roles. A user's role determines the user's access to AO features.

➔ Editing User Accounts

From the *Users* page; accessible from the **USER ADMINISTRATION** menu:



	Name	Expires	Voter	Roll	Id	Status	Delete
ADD	Member, Board	08/30/05	Y	Y	board	Active (Deactivate)	DELETE
EDIT	Member2, Board	05/26/05	Y	Y	board2	Active (Deactivate)	DELETE
EDIT	Member3, Board	05/26/05	Y	Y	board3	Active (Deactivate)	DELETE
EDIT	member4, board	06/27/05	Y	Y	board4	Active (Deactivate)	DELETE
EDIT	Member5, Board	06/27/05	Y	Y	board5	Active (Deactivate)	DELETE

- Click a letter or **ALL** to display users that have already been created.
- Click **EDIT** next to a name to edit the user's preferences.
 - See the *User Preferences* section for details about user and group roles.
- Click **SAVE** after making necessary changes.

➔ Deactivating Non-Voting Users

Regular, non-voting users can be deactivated in one step.

1. Login.
2. Click on **TOOLS**.
3. Click on *Users*.
4. From here, you can click the word "Deactivate" next to the user. The user's status will change to "Disabled."




Name	Expires	Voter	Roll	Id	Status
Administrator, Meeting	06/27/05			mgadmin	Active (Deactivate)
ADMIN, CSRA	06/09/07			admin	Active (Deactivate)
board, test	11/19/08	Y	Y	board	Active (Deactivate)
Brandes, Jo Anne	04/14/06			brandes	Disabled (Recover)
Cash, Bryan	07/02/06			cash	Disabled (Recover)
Frank, Bob	07/13/05			frank	Active (Deactivate)
Luthe, Kim	12/04/06			luthe	Active (Deactivate)
Member, Board	06/30/05	Y	Y	board	Active (Deactivate)
Member2, Board	06/26/05	Y	Y	board2	Active (Deactivate)
Member3, Board	06/26/05	Y	Y	board3	Active (Deactivate)
Member4, Board	06/27/05	Y	Y	board4	Active (Deactivate)
Member5, Board	06/27/05			board5	Disabled (Recover)

➔ Deactivating Board Members

Deactivating board members requires preplanning and requires a few steps. First, make sure you have taken attendance and votes for the meetings in which the board member had been involved. Then proceed with the deactivation steps below.

1. Login.
2. Click on **TOOLS**.
3. Click on *Users*.
4. Click **EDIT** next to the board member you wish to deactivate.



User Inspector

NAME: Board

TITLE: Member

STATUS: Active

ROLES:

- BOARD_MEMBER
- USER_ADMIN
- BOARD_MEMBER_ADMIN

PERMISSIONS:

- SUPERVISOR - (see notes: This bypasses the Role Engine and allows access to every part of the system.)

Save: [Save] [Cancel]

NOTE: Do not delete a board member. Deleting the board member's user account will delete their entire voting history!

5. You will need to uncheck the boxes next to: “Account is active” and “Include in meeting role.”
6. Click **SAVE**.

Are you still seeing a former board member’s name appearing in the printed minutes?

If the current meeting being used was copied from an older meeting (not a template) in which the user account may have still been active or attendance was recorded for a meeting prior to deactivating a user account, the board member’s name may still appear on the printed version of the minutes and the user accounts will not show in the record meeting attendance screen to be unchecked. The steps below will fix the problem, in most cases. If you do not obtain the desired results from the steps below, please contact CSBA for assistance.

1. **EDIT** the user’s account from the Users page.
2. Check the boxes next to: “Account is active” and “Include in meeting role.”
3. Click **SAVE**.
4. Navigate back to the meeting(s) minutes and uncheck the member from the “Record Meeting Attendance” screen.
5. Go back and follow the steps for deactivating a user account.



➔ Sending Messages to Active Users

Do you have important or emergency information to be conveyed to all users? Text will appear for all views, including the public view.

1. Click on *Send Message to Active User* under **USER ADMINISTRATION**.



2. Enter text to be displayed in the box and click **SUBMIT**.
3. To remove the displayed text, follow step 1. In step 2 delete, instead of enter, text.

Creating Item Status Labels

A feature you may choose to have added to your **AgendaOnline** site is the ability to track an item's status as it moves through the submission and review process. Contact CSBA to have this feature turned on.

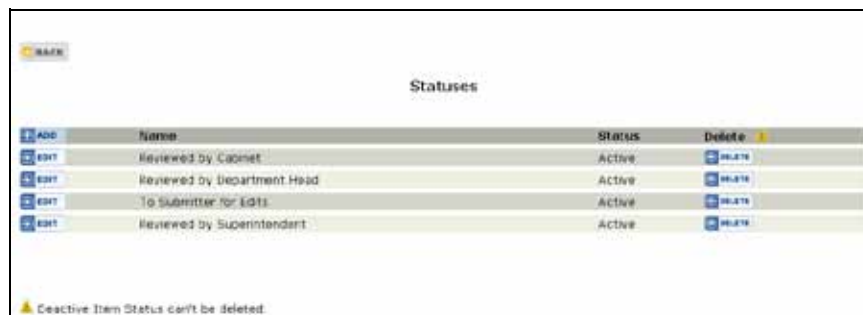
Only authorized users, usually meeting administrators and reviewers, can create, edit, and delete item status labels.

➔ To create item status labels:

1. Click **TOOLS**.
2. Click *Item Statuses* under the **AGENDA ADMINISTRATION** menu.



3. The *Statuses* page will appear. From this page you can **ADD**, **EDIT**, or **DELETE** statuses.



➔ Adding a New Status

1. From the **TOOLS** page, click *Item Statuses*.
2. Click the **ADD** button from the *Statuses* page.
3. Complete the *Status Name* and *Status Code/Order* fields. To have the status active and usable, leave the *Deactivated/Hidden* box unchecked.

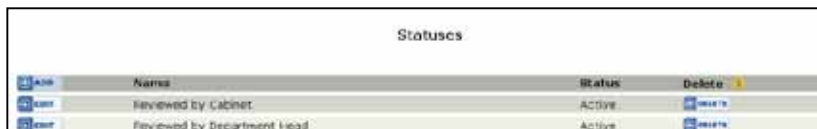


4. Click **SAVE** to save the information or **CANCEL** to delete.

Note: Once a status is added, it cannot be deleted from the list. Using the **DELETE** button only deactivates the status.

➔ Deleting a Status

1. Click on **TOOLS** then *Item Statuses*.
2. Click the **DELETE** button next to the appropriate status name from the *Statuses* page.



	Name	Status	Delete
	Reviewed by Cabinet	Active	
	Reviewed by Department Head	Active	

3. The status will change to “Deactive.”

➔ Reactivating a Status

1. From the **TOOLS** page, click on *Item Statuses*.
2. Click the **EDIT** button next to the deactive status from the *Statuses* page.
3. Uncheck the box next to *Deactivated/Hidden* on the Status Inspector page.

Note: If items currently in review are using this status label, the following message will appear: “Notice: This status has agenda items associated with it. Do not change the “meaning” of this status.” This assures that changing the status does not affect pending reviews by other individuals.

4. Click **SAVE**.

➔ Changing Item Statuses

In order to change an item’s status, the meeting administrator must first have set up item status labels and given a user the ability to alter an item’s status. To turn on this feature for a group or individual, see the “User and Group Preferences” section.

1. Access the *Item Inspector* screen one of three ways:
 - a. Click **EDIT** next to a submitted item.
 - b. Click **APPROVE**, and then **EDIT**, from the *Submitted Item Browser*.
 - c. Add/Submit a new item to the agenda.

- From the *Item Inspector* screen, use the drop-down menu next to the Status field on the right side of the screen to choose the appropriate status.

- Make any other necessary changes, then click **SAVE** or **SAVE AND CLOSE** on the bottom of the screen.

➔ Viewing an Item's Status

There are two ways to check the status of an item.

- From the **TOOLS** menu, click on *Review Submitted Items* or *Submitted Items*. Next to the appropriate item, click *View*, *Edit* or *Modify*.
- Open/Edit an item from the agenda.

For more information about editing the *Item Inspector* screen and using the *Submitted Item Browser*, refer to the “Submitter,” “Reviewer,” or “Meeting Administrator” sections.

static snapshots

Static snapshots are helpful for individuals who want to view the meeting, including all closed session items and attachments, while not connected to the internet. Static snapshots are also a highly recommended way to keep meeting records.

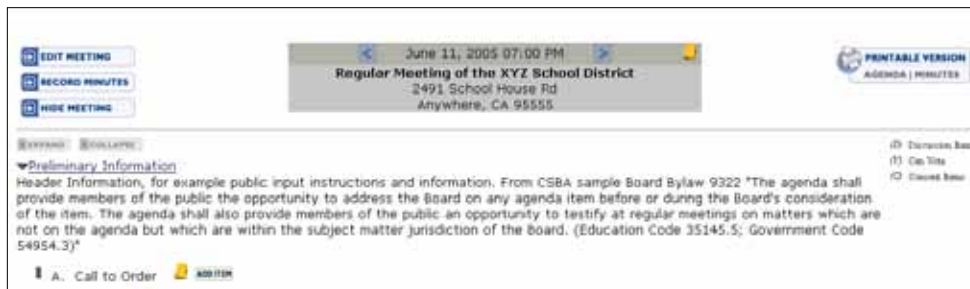
CSBA recommends using this function to make a backup before each meeting. The offline version may be used if internet connectivity is lost during a meeting.

Creating Static Snapshots

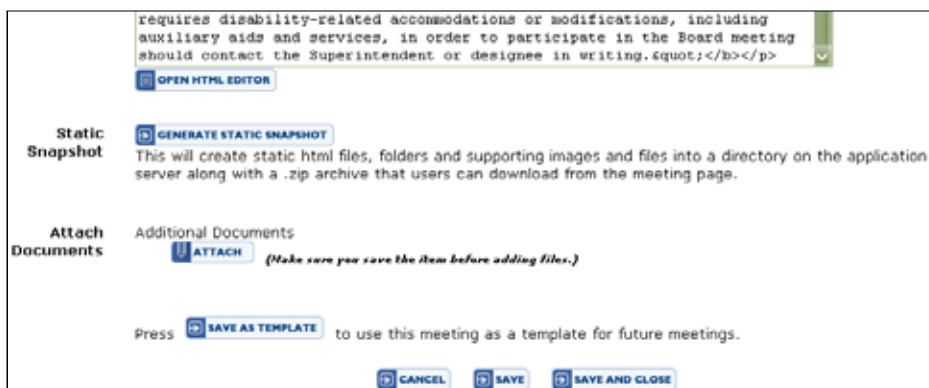
Only authorized users can create a static snapshot. These snapshots create a .zip file which contains all the agenda information, including attachments and confidential items. Once created, only users who have been given access can download the file.

To create a static snapshot:

1. Enter the appropriate meeting and click **EDIT MEETING**.



2. Scroll to the lower portion of the screen and click **GENERATE STATIC SNAPSHOT**.



3. An underlined link, which reflects the date and time the snapshot was created, will appear. This is the link to the .zip file containing meeting information.

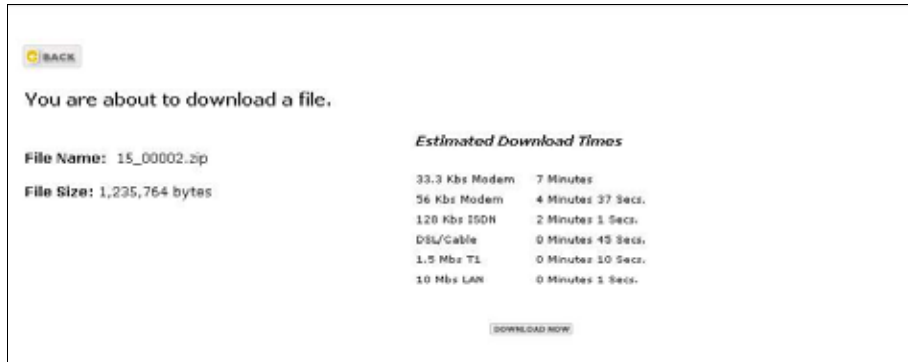
Accessing Static Snapshots

Only authorized users, usually the meeting administrator and board members, can download static snapshots. Caution: Do not download the meeting to a computer used by others, as it can contain sensitive information.

1. Click the underlined date link accessible from the *Meeting Inspector* screen or under the *Offline Version* section on the agenda page.
2. Click **DOWNLOAD NOW** to download the .zip file to your computer.

Other Info

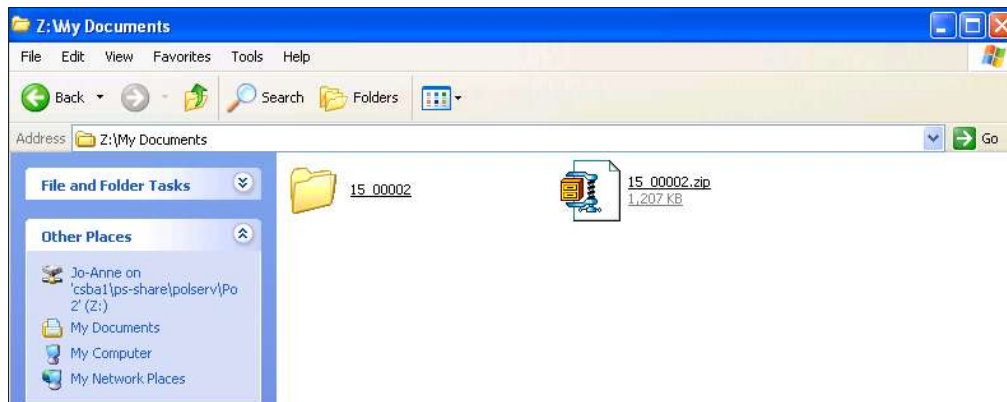
- ▶ [Official Attendees](#)
- ▶ [Offline Versions](#)



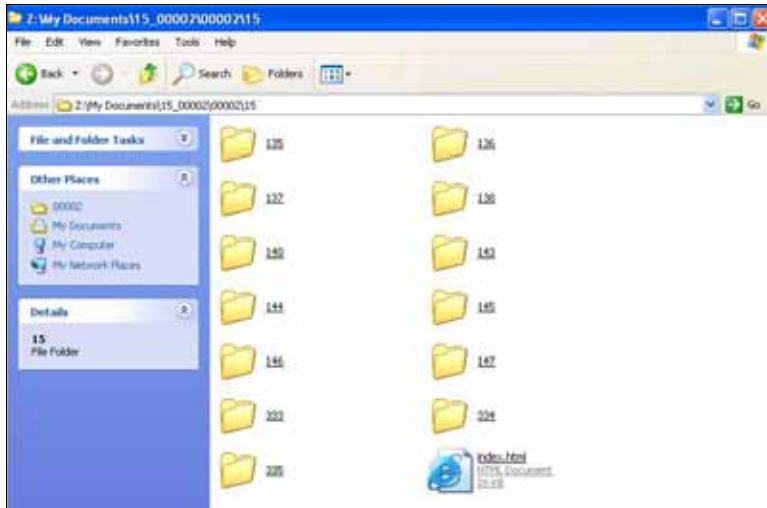
3. Click Save to save the file to your computer.



4. Double click the .zip file and extract the files to a location on your hard drive. A folder will be created on your hard drive.



5. Open the folder. The folder contains additional folders and an index.html file.



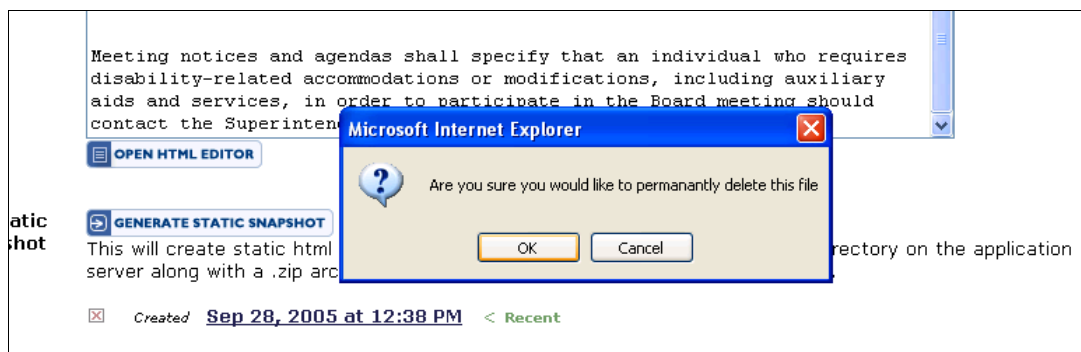
6. Double click index.html to open the meeting. It will open the meeting agenda in your default browser.

At this point you can click on any links as you would when accessing the meeting online.

Note: These steps may vary slightly depending on the file extraction method your system uses.

Deleting a Static Snapshot

Only a meeting administrator can delete a static snapshot. Deleting the file will NOT delete the meeting. It only deletes the static snapshot.









To delete snapshot, click the small red  next to the file name.

buttons and icons

This section outlines the various **AgendaOnline** buttons and icons.

General Buttons and Icons









Some users may not see all the buttons or icons listed below. An asterisk (*) indicates items that function for authorized users only.

Button/icon	Screen found	Function
	Homepage	Searches all published meetings for keyword entered
	Multiple	Saves data entered in fields on screen
 	Multiple	Saves data entered and closes window
	Multiple	Saves data entered/submits data to agenda
	Multiple	Cancels transaction/ does not save entered data
	Multiple	Deletes selected fields/ does not save screen
	Item detail	Moves directly to next item detail without going back to full agenda
	Item detail	Moves directly to prior item detail screen
	Multiple	Moves back to previous screen
	Agenda	Closes all sections; section and item details hidden
	Agenda	Opens all sections; section and item details visible

Button/icon	Screen found	Function
	Multiple*	Adds a new agenda item
	Item Inspector*	Allows users to attach a supporting document
	Attach File/ Hyperlink	Allows users to search for files to attach
	Multiple*	Downloads a previously attached supporting document
	Item Inspector	Shows how items will appear on agenda
	Agenda*	Click on icon to add a sticky (personal) note
	Agenda*	Displays when an item, section, or agenda has a sticky note
	Agenda	Closes or opens details; *allows sections or items to be moved up or down
	Item Inspector	Opens a new window with an editor to format data
	Multiple*	Adds information, depending on access screen
 	Multiple*	Allows changes to data
	Agenda	Copies information from one section or agenda to another section or agenda
	Printable Version	Formats agenda for printing
	Agenda	Submits item to new meeting via submitted item browser

Meeting Administrator Only Buttons

The buttons below are specific to meeting administrator functions since they have the ability to perform functions not available to other users.

Meeting administrator only buttons	Screen found on	Function
 RECORD MINUTES	Agenda	Opens <i>Record: Minutes & Attendance</i> screen
 PUBLISH MEETING	Agenda	Publishes an agenda so it appears on the calendar for public viewing
 HIDE MEETING	Agenda	Removes an agenda from public view
 GENERATE STATIC SNAPSHOT	Meeting Inspector	Creates an offline version of the meeting; includes all attachments
 SAVE AS TEMPLATE	Meeting Inspector	Saves meeting format to be used as a template for use in future agenda creation
 PREVIEW MEETING	Meeting Inspector	Shows how the agenda will look with newly added information
 ADD SECTION	Meeting Inspector	Adds a new section
 IMPORT RECOMMENDATION	Record: Minutes and Attendance	Imports the Recommended Action field into minutes (if applicable)

user preferences

Before editing a user, please review the following user and group preference details. Preferences can be added or deleted for the different group roles or for specific individuals by clicking the *User Role Preferences* link under the TOOLS menu.

User Preferences

The preferences below may be used to provide user access to **AgendaOnline** features. Some preferences work independently of other features. Depending on the nature of access needed, multiple preferences may need to be used to achieve the desired access results.

➔ User Preference Details

canAccessTools	Causes TOOLS to appear; needed for any function that appears under General, Agenda, or User Administrations or Application Preferences.
canAccessUnPublishedMinute	Allows users to view unpublished minutes.
canADDAgendaItem	Controls ability to add an agenda item to a meeting.
canADDDHyperlinks	Controls ability to add a hyperlink to an agenda item.
canAddOnlineDocumentsToItems	Controls ability to add an online document to an agenda item.
canAddUser	Controls ability to add a user. Dependency= canAdminUsers
canAdminUsers	Controls general access to the user administrator. Dependency= canAccessTools
canApproveSubmittedItems	Controls ability to approve, edit and delete submitted items
canCreateAgendaItem	Controls ability to add an agenda item.
canCreatePrefWalletEntities	Controls ability to create higher-level entities in the PrefWallet engine. Dependency= canAccessTools
canDeactivateUser	Controls the ability to activate/deactivate users. Dependency= canAdminUsers
canDeleteAgendaItem	Controls ability to delete agenda items.
canDeleteAgendaItemFiles	Controls ability to delete an attached file.
canDeleteHyperlinks	Controls ability to delete an attached hyperlink.
canDeleteOnlineDocsFromItems	Control ability to delete online documents.
canDeleteUser	Controls ability to delete a user. Dependency= canAdminUsers

canDownloadStaticVersion <i>*Static versions are only available if an authorized person has created one.</i>	Controls user's ability to download a static meeting version. <i>Do not give this permission to anyone who is not authorized to view confidential documents.</i>
canEditAgendaItem	Controls user's ability to edit agenda items.
canEditAgendaItemFiles	Controls user's ability to add, modify, or delete item file attachments.
canEditGoals	Gived access to add and edit goals.
canEditGroupPrefs	Can access the pref management tools.
canEditHomePage	Allows a user to edit the contents on the homepage.
canEditHyperlinks	Allows a user to edit the associated hyperlinks.
canEditOnlineDocs	Allows a user to edit the online document text.
canEditPrefWallet	Allows a user to access the pref admin tools.
canEditPrefWalletPrefs	Allow a user to access the prefs component of the pref admin tools.
canEditRoll	Part of the minutes feature; allows user to record and edit the meeting roll.
CanEditStatus	Allows user to add, edit or delete item statuses (<i>Site must be configured for this ability to function: ask CSBA for details</i>).
canEditUser	Allows user editing.
canFlagAgendaItemCommentsForResponse	User can check that a comment needs a response. <i>Not recommended for use.</i>
canMarkAgendaItemReady	User can mark agenda items as ready for meeting and alter an item's status (<i>If site is configured for Item Status ability</i>).
canPostAgendaItemComments	User can post comments about an item. <i>Not recommended for use.</i>
canReadPostedComments	User/group can read posted comments. <i>Not recommended for use.</i>
canRebuildIndex	User can reindex the database.
canRecordMinutes	Allows user to record minutes for a meeting.
canRecordVotes	Allows user to record votes for a meeting.
canReOrderAgendaItem	Allows user to access the ordering tools.
canReplyToAgendaItemComments	User can post reply to agenda item comments. <i>Not recommended for use.</i>
canReplyToFlaggedAgendaItemComments	User can only reply to flagged comments. <i>Not recommended for use.</i>
canReviewSubmittedItems	Allows user to view submitted items. No edit rights are given.
canSubmitItem	Allows user to submit items, attach supporting documents/hyperlinks, edit the submitted item until it is approved for the agenda and resubmit items.
canUploadAgendaItemFiles	User can use the uploader to attach files to agenda items.

canViewConfidentialAgendaItems	User can view confidential and closed session items. Only users authorized to view confidential documents used for closed session items should be given this preference.
canViewNonReadyItems	User can view non-ready items.
recentChangeThreshold	Number of days for recent changes to show icon on agenda.
canUseStickyNotes	User can use the sticky note feature.

Group Preferences

Recommended group default settings are listed below. Group preferences can be changed to meet individual needs. Individual accounts can also be edited to meet individual role requirements.

→ Group Role Settings

	<i>meeting administrator</i>	<i>submitter</i>	<i>board member</i>	<i>management/superintendent</i>	<i>reviewer</i>
canAccessTools	●	●	●	●	●
canAccessUnPublishedMinute	●		●		
canAddAgendaItem	●				
canAddHyperlinks	●				
canAddOnlineDocumentsToItems	●				
canAddUser	●				
canAdminUsers	●				
canApproveSubmittedItems	●				
canCreateAgendaItem	●				
canCreatePrefWalletEntities	●				
canDeactivateUser	●				
canDeleteAgendaItem	●				
canDeleteAgendaItemFiles	●				
canDeleteHyperlinks	●				
canDeleteOnlineDocsFromItems	●				

Some districts may have board presidents who review agendas before publishing. In that case, the president may be given an extra preference, canViewNonReadyItems, on top of board member settings.

*If your district is configured to track item statuses, optional preferences (marked with *) must be turned on for certain individuals or groups to use this feature.*

➔ Group Role Settings (continued)

	meeting administrator	submitter	board member	management/superintendent	reviewer
canDownloadStaticVersion	•		•	•	
canEditAgendaItem	•				
canEditAgendaItemFiles	•				
canEditGoals	•			•	
canEditGroupPrefs	•				
canEditHomePage	•				
canEditHyperlinks	•				
canEditOnlineDocs	•				
canEditPrefWallet	•				
canEditPrefWalletPrefs	•				
canEditRoll	•				
canEditStatus*	•				
canEditUser	•				
canMarkAgendaItemReady	•				
canPrintBoardPacket	•		•	•	
canReOrderAgendaItem	•				
canRebuildIndex	•				
canRecordMinutes	•				
canRecordVotes	•				
canReviewSubmittedItems	•			•	•
canSubmitItem	•	•		•	•
canUploadAgendaItemFiles	•	•			•
canUseStickyNotes	•	•	•	•	•
canViewConfidentialAgendaItems	•		•	•	
canViewNonReadyItems	•			•	

Some districts may have board presidents who review agendas before publishing. In that case, the president may be given an extra preference, *canViewNonReadyItems*, on top of board member settings.

If your district is configured to track item statuses, optional preferences (marked with *) must be turned on for certain individuals or groups to use this feature.