Fast Track

Signing In To BoardDocs

1. Enter your BoardDocs site address in the browser or double-click the shortcut on your desktop.
2. Enter your BoardDocs username.
3. Press the **<TAB>** key.
4. Enter your BoardDocs password.
5. Press the **<ENTER>** key.

Viewing Upcoming Meetings

1. On the **Welcome** panel, under **Current Meetings**, click on the meeting you wish to view.
2. On the **Meeting Dashboard** that appears, click the **View the Agenda** button.
3. Click on an agenda item on the left side of the screen. Item details and content will appear on the right side of the screen.
4. Click on other agenda items as desired to view their details and content.

Viewing Archived Meetings

1. On the **Meetings** panel, click on the divider bar for the year in which the meeting that you want to view was held, and then click on the desired meeting.
2. On the **Meeting Dashboard** that appears, click the **View the Agenda** button.
3. Click on an agenda item on the left side of the screen. Item details and content will appear on the right side of the screen.
4. Click on other agenda items as desired to view their details and content.

Viewing Policies (if used by your organization)

1. Click on the **Policies** tab.
2. Click on the drop down arrow next to the **Book** field to select the policy book to view.
3. Click on the desired section title to expand the section.
4. Click on the policy you want to view.

Viewing Library Documents

1. Click on the **Library** tab.
2. Click on the type of document you want to view to expand the list.
3. Click on the document you want to view.

Searching Single Agendas

1. Select the meeting that you want to search from the **Meetings** panel.
2. Click the **View the Agenda** button.
3. Click in the **Search** field located at the top of the agenda item list.
4. Enter the term or terms on which you want to base your search.
5. Press the **<ENTER>** key or click the **Search** tool (magnifying glass) to execute the search.

Searching All Agendas

1. Click on the arrow symbol in the **Meetings** tab.
2. Select either **Active** or **Draft** depending on the type of meeting you want to search.
3. Click in the **Search** field located at the top of the meeting list.
4. Enter the term or terms on which you want to base your search.
5. Press the **<ENTER>** key or click the **Search** tool (magnifying glass) to execute the search.

META Searching

1. Click on the **Search** tab.
2. Enable the **META** checkbox.
3. Click in the **Search** field near the top of the panel.
4. Enter the term or terms on which you want to base your search.
5. Press the **<ENTER>** key or click the **Search** button to execute the search.

Print the Agenda from the Meeting Dashboard

1. Click on the meeting you want to print in the **Meetings** panel.
2. Click on the **Print the Agenda** button to display the print preview window.
3. Select the **Simple Agenda, Detailed Agenda** or **Current Agenda Item** tab to specify what you want to print.
4. Click the **Print** button in the lower-right corner of the print preview window.

Print the Agenda from the Agenda Panel

1. Click on the meeting you want to print in the **Meetings** panel.
2. Click the **View the Agenda** button.
3. On the agenda tab, click on one of the print tools to display the print preview window.
4. Click on the **Simple Agenda**, **Detailed Agenda** or **Current Agenda Item** tab to specify what you want to print.
5. Click the **Print** button in the lower-right corner of the print preview window.

Submitting Agenda Items

1. Click on the arrow symbol on the **Meetings** panel and choose **My Agenda Items** from the menu.
2. Click the **Add New Item** button (green button with a plus sign).
3. Choose the meeting to which you want to add the item from the **Meeting** drop down menu.
4. Choose the category to which you want to add the from the **Category** drop down menu.
5. Enter a subject for the item in the **Subject** field.
6. Choose who can access the item from the **Access** drop down menu.
7. Specify the agenda item type in the **Type** list.
8. Choose the appropriate approval tree from the **Approval Tree** drop down menu.
9. Add content to the three content fields as desired.
10. Attaching supporting documents to the agenda item by clicking the **Browse** button.
11. Click the **Submit** tool when you are ready to submit the item.

Approving Agenda Items

1. Click on the arrow symbol on the **Meetings** panel and choose **My Agenda Items** from the menu.
2. Click on the item that you want to view in your My Agenda Items list.
3. Edit the item if desired by clicking the **Edit** tool (pencil icon).
4. Approve the item if desired by clicking on the **Approve** tool (green checkmark icon).
5. Reject the item if desired by clicking on the **Reject** tool (gear symbol with yellow triangle).

Instructions for writing the Agenda Item Details Section

Please do not use ALL CAPS when filling in the Agenda Item Details section. BoardDocs ® Pro defaults to ALL CAPS in the Category line; but to maintain consistency, please do not do so in the other sections.

Meeting – Scroll on down arrow and choose meeting date
Category – Choose option that applies
Subject – Type in your subject – Remember, do not use ALL CAPS in this section
Access – **ALWAYS** choose **Public**—I repeat **ALWAYS CHOOSE PUBLIC** because if you don't do that, your item will not load onto the agenda when I make it live. And this is a detail I cannot correct once the agenda is made live.
Type – Choose option that applies. Please note that Action and Action (Consent) are two different types. Choose Action (Consent) for the Consent Agenda items only.
Preferred Date – Choose date of Board Meeting
Absolute Date – Leave blank
Dollar Amount – Provide only if you know the specific amount
Fiscal Impact – Choose Yes or No
Budgeted – If you chose Yes for Fiscal Impact, please choose Yes for this category; and vice versa
Budget Source – OK to leave blank, not required
Recommended Action: Please begin this line with – **A recommendation that the Board of Trustees**… (Please make sure your recommendation is specific and understandable.)

Instructions for writing the Public Content Section

Please use **Arial, font 16**, for all information you write in this section. The Public Content section contains what is viewed by the public once the agenda goes live. For all practical purposes, you can ignore the Administrative and Executive Content sections.

Because the Public Content section is included when the Detailed Agenda print option is chosen, it's not enough for you to simply attach pdf files--even when the information is too large to copy/paste directly into this section. The pdf attachments will not print out with the Detailed Agenda print option. BoardDocs ® Pro is designed this way because many attachments are very large and are often provided for information only but are not to be included as an official part of the board agenda. Therefore, it's important you write something here—an explanatory paragraph, whatever—but the public should have an idea of what's in the attachments. And speaking of attachments…

Remember, all attachments must be in **pdf format**. Also, as mentioned above, since some attachments are part of the official board agenda (the Brown Act requires we keep a master hard copy of this,) and some attachments are simply included for information on an agenda item, we must differentiate between those attachments. To make things easier, please adhere to this practice.

If the attachment is to included in the official copy of the board agenda, please begin the file name with **A-**
For example: A-Management Personnel Actions
If the attachment is provided FIO as backup material, please begin the file name with **B-**
For example: B-Revised org chart for Chancellor's Office
This practice will really help us avoid the confusion many have expressed about what "is and is not" a part of the board agenda.

Hopefully, these brief instructions will better assist you in writing your board agenda items. If you have any questions or need assistance, please let me know; and I'll walk you through the process.