<u>Creating an Agenda</u>

<u>Brief Overview</u>:

1. Create all of the items first!
    - All items need to be "save and approved" or they will not be able to add them to the agenda.
    - If not approved, they show up as "draft" which could be helpful if you are waiting on a document, etc.
    - Documents can be added to the items to create an agenda packet
2. Create new agenda.
    - Edit the header to include meeting date, time and location.
    - Add items to agenda
    - Save and Publish agenda when it is complete.
3. Submit workorder to support@nattleboro.zendesk.com so the calendar meeting event can be created and the agenda linked it.

Building the Items: Visual Walkthrough

1. Go to Modules -> Agenda Center
2. Click the name of the Board/Committee
3. On the right, click the yellow "Add Item"
4. In the Name field, type the item contents (i.e. Approve minutes for January 1, 2023")
    a. **Very Important!** If you are copying/pasting from another document you must Paste as Plain Text (right click and choose paste as plain text or on the keyboard use ctrl+shift+v)
5. Suggested Meeting Date can be added, but is not required. It is useful to fill in when creating items for multiple agendas at the same time.
6. Description is optional. It will show up directly under the item. Example:

    a. Paul Parker, 58 George Leven Drive **<--- Item Name**
    Level 2 Site Plan Review & Aquifer Protection Special Permit - **<-- Description**

    a. If a document is being reviewed in the meeting or needs to be included in the agenda packet, Attach the file(s), preferably a pdf. Whatever the filename is shows up in the agenda so please name it appropriately. If an x appears over the file and it will not let you upload, it most likely has an invalid character in the filename. The symbols & and $ are not allowed in the filename.

    You have an invalid character in your filename. These are the accepted characters: a-z A-Z 0-9 ~ !( ) - _ = [ ] { } , .

7. Scroll back to the top and click the yellow "Save and Approve". You can go back and modify it before it is added to the agenda if needed.
    a. If you only click "Save Changes", the item will be saved as a draft and cannot be added to the agenda until it is approved.
8. Repeat for all agenda items
9. When all of the items have been created and approved, it is now time to build the agenda.

Tip: To delete an item, navigate back to the Board/Committee page of the Agenda Center and click on "Items" tab to show the list of all available items, then click "Actions" to the right of the item you want to delete it, then choose delete.

Creating the Agenda: [Visual Walkthrough]

1. Click the yellow "Add Agenda" on the right.
2. Select the meeting date.
   a. Ignore "Override Posted Date and Time" unless you have copied a previous agenda, in which case delete the date and time from these fields
3. Add Description: should read **(Board/Committee Name) Public Meeting Agenda**
4. Scroll down and click "Header"
   a. Where it says MEETING DATE change to appropriate date and time
   b. Update location if needed
   c. Click Header again to hide it
5. Click and drag an item from the right onto the agenda where it belongs.
   a. All of the items that have been created and approved are on the right side. If you added a suggested meeting date, those items show up on top.
   b. Indent items from the previous item to become a sub-item of the previous item on the agenda and numbered accordingly. It can be a little finicky.
   c. Once an item has been added to the agenda, it CANNOT be altered! You would have to remove the item from the agenda, save the agenda, go back to the item tab to modify the item, then add the modified item back into the agenda.
   d. Most of the agendas have default items that have already been created and automatically added to the agenda. They can be reordered if needed.
   e. To remove an item from the agenda, click and drag it to the right side where the list of items are.
6. Once the agenda is complete, scroll to the top and click "Save and Publish"
   a. If the agenda is not yet complete, click "Save" and it will save it as a draft.
   b. If the agenda has been previously saved and then modified, a box will pop up asking if the agenda should be shown as amended or not. If less than 48 hours prior to the meeting, click "Show as Amended" and add "Amended" to the Description of the agenda.
7. A box will pop up about adding it to the RSS feed. Click ok.
   a. Another box will pop up
   b. Click the circle next to "x Number of Days in advance"
   c. Add the number 2 in the box next to "Days in Advance of Meeting Date".
   d. Click send.
8. Submit a workorder to support@nattleboro.zendesk.com so the calendar meeting event can be created and the agenda linked it.

Note: The agenda is used as a framework for the meeting minutes. If you need to add a call to order/roll call for the minutes, be sure that it is included in the agenda. The item cannot be added after the fact when creating the minutes.