



## 2018 April 2.8 Release Notes

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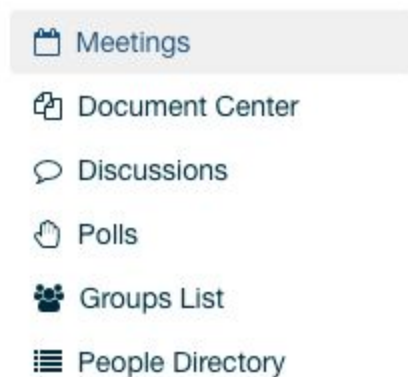
## Meeting Center

Updates have been made to the meetings center to give Boardable users more flexibility in preparing for board meetings. The feature updates include a new draft mode, publishing options and a new agenda builder.

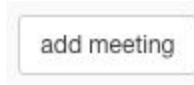
### Adding meetings: Unpublished vs. Published

(Administrators, Group Owners, Members)

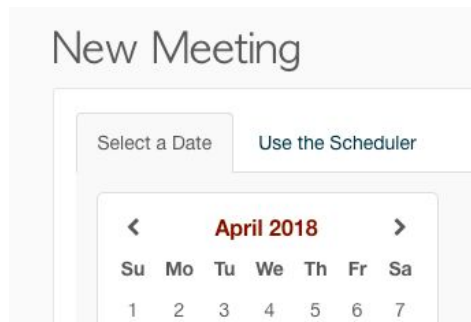
To add a new meeting select **Meetings**



This will bring you to the meetings dashboard, next select **'add meeting'**



You will then see the option to select a single date for your upcoming meeting or use our **Scheduler Tool** to survey your members for the date that works best.




Fill in the meeting information fields

- Title
- Location
- Description

- Assign to Group
- Add Individual Users


After you have added all of the necessary information select '**save and continue**'

A dark blue rectangular button with the text "Save and continue" in white.

Your new meeting is now in draft mode and you see new options to continue to fill out the content of your new meeting:

- Edit Meeting Info
- Update Member List
- Build Agenda (New!)
- Add Poll
- Send Message to Meeting Members

After you have added all of the relevant content you can either '**Publish the Full Meeting**' or '**Publish Calendar Only**'

A green rectangular button with the text "Publish Full Meeting" in white.A dark blue rectangular button with the text "Publish Calendar only" in white.

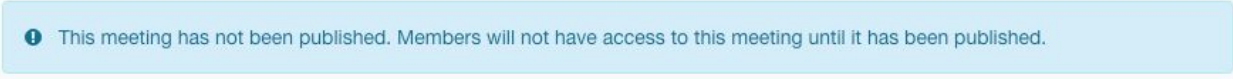
#### **Publish Full Meeting:**

This will publish the meeting and display on all integrated calendars, dashboards and prompt users to RSVP to the upcoming meeting and allow them to view all documents, agendas etc.

#### **Publish Calendar Only:**

If you aren't ready to share documents or the agenda you can choose to publish the date and meeting information (title, location, description) only. This will hold the date on all integrated calendars and dashboards and allow users to RSVP to the meeting.

You can check the state of the meeting you are editing by referencing the blue box at the top of your page.

A light blue rectangular box with a thin border. It contains an information icon (a lowercase 'i' inside a circle) followed by the text: "This meeting has not been published. Members will not have access to this meeting until it has been published." data-bbox="135 706 767 720"/>

After publishing your meeting you will be given the option to send notifications to your meeting invitees.

Publish Meeting

☐ Send attendees an email notification about this meeting

Cancel

Publish

## New! Agenda Builder

If you want to continue to use your own agenda and simply upload it to Boardable, please do so! We have now added an agenda builder for you to build your agenda inside of the product.

### How to build an agenda

To build an agenda create a meeting and select '**Build Agenda**'

Edit Meeting Info

Update Member List

Build Agenda

Add Poll

Send Message to Meeting Members

Once you have the agenda open you can begin adding in your meeting items.

### Agenda

1. 

Add

Click on the item after it has been created to access the following functions:

- Assign person responsible
- Add description
- Upload documents
- Add sub items

Welcome

- person responsible -

Save

1. 

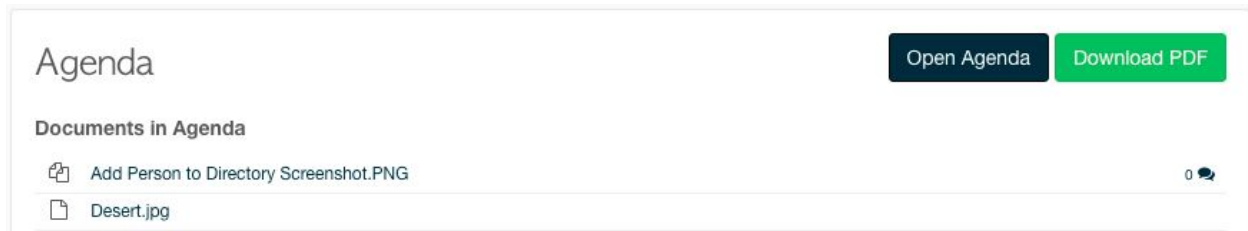
add description

upload documents

1. 

Add

After you have completed the agenda you will see all agenda go back to your meetings screen. You will then see the Agenda section populated with the option to **'Open Agenda'** or **'Download PDF'**. All meeting members will also see all documents that are in the agenda below.



### Sharing your agenda and sending a message to meeting members

All users that have been invited to the meeting will be able to open or download the Agenda from Boardable by opening the meeting.

To send the agenda in a message you can select **'Send message to meeting members'** and check the box to include meeting details or attaching the agenda as a PDF.

### Taking personal agenda notes

All meeting members can also take personal notes by opening the agenda landing page and selecting an item adding notes.



After you have added your notes you will see an indicator by each item that has had a note added to it.

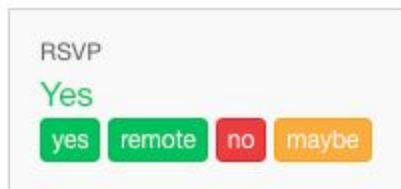
### 3. Committee Updates

#### 1. Community Relations

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## RSVP Enhancements

RSVP options have been updated to allow users to RSVP as remote and for admins or meeting collaborators to edit a user's RSVP.



RSVP

Yes

yes remote no maybe

If you are the creator of the meeting or a collaborator you can edit a response by going to the people section of the meeting and clicking on the RSVP response



yes remote no maybe no response

✓ yes ✓

## Adding a Collaborator to a meeting

After you create a meeting you can add collaborators to help add documents, edit the agenda or even keep track of your attendance and RSVP records. \*All administrators are collaborators by default.

To add a member or an observer as a collaborator to your meeting go to the people section and click on the checkmark next to the user's name.



Collaborator RSVP Attendance

✓ no ✓

This user will receive an email notification alerting them that they have been added as a collaborator to your meeting. After they have collaborator status they can perform the following actions:

- Edit Agenda
- Send Meeting Message
- Update RSVP
- Take Attendance
- Add Documents
- Add Poll

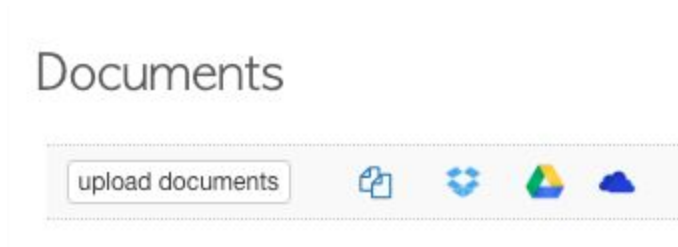
## Multiple Document Upload

We have added the ability to upload multiple documents to a meeting as well as to the Document Center.

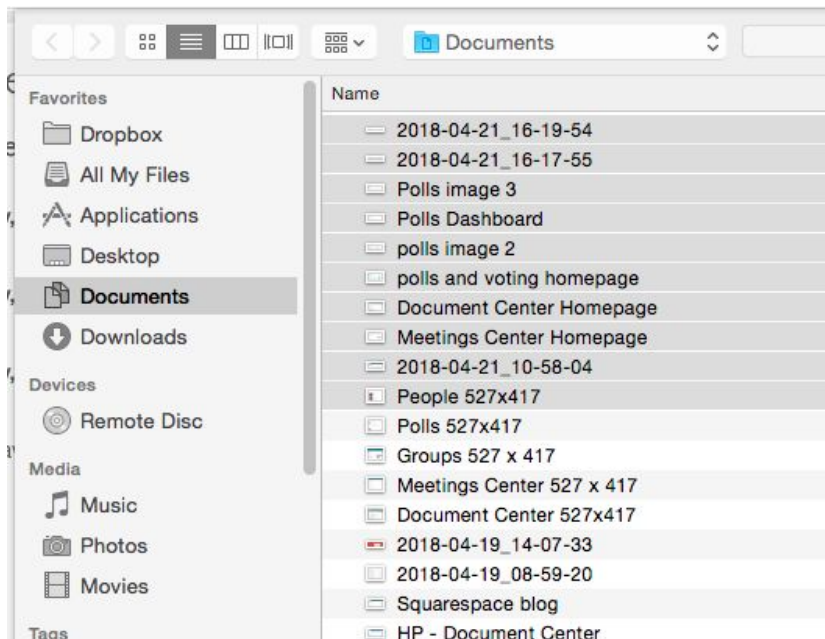
### Upload documents to a meeting

To upload multiple documents from your computer to a meeting select '**upload documents**'

**\*\*Note:** if you upload documents directly to a meeting or a group they will not be saved in Boardable's Document Center.



Once you have selected 'upload documents' you will see the option to add documents from your computer. To select multiple documents hold down shift or command and click on each item and click open.



You can also upload documents to a meeting from the following places:

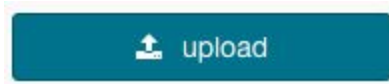


- Boardable Document Center
- Dropbox

- Google Drive
- OneDrive

## Uploading documents to Document Center

You can upload one document at a time if you would like to add a new name, notes or email to a group by selecting the **'upload'** option in the Document Center.



After selecting upload you will see this screen

Upload File to Boardable Beta Testing 1

×

Select File

This file will be accessible by everyone in the Document Center

Document Title

optional

Notes

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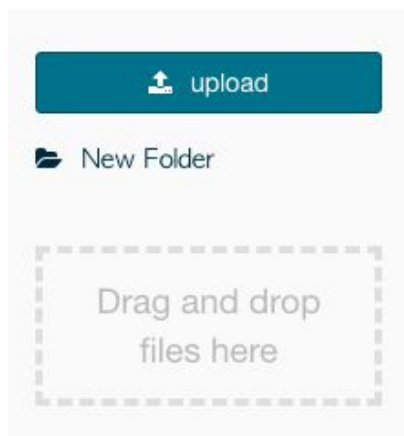
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☐ Email this document to people

To upload multiple documents to the document center open the documents folder on your computer and use shift or command to select and then drag to the 'drag and drop' section.





## Mobile Style Updates

We have updated our mobile experience to allow key actions to be performed on a phone or tablet!