



## 2018 July 2.9 Release Notes

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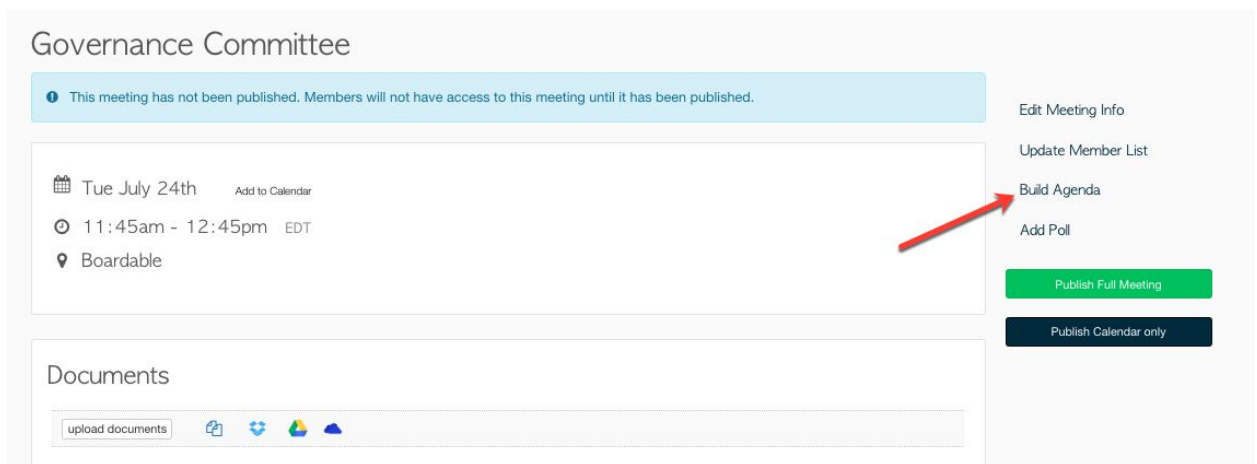
# Meeting Center - Agenda Builder

## New! Agenda Templates

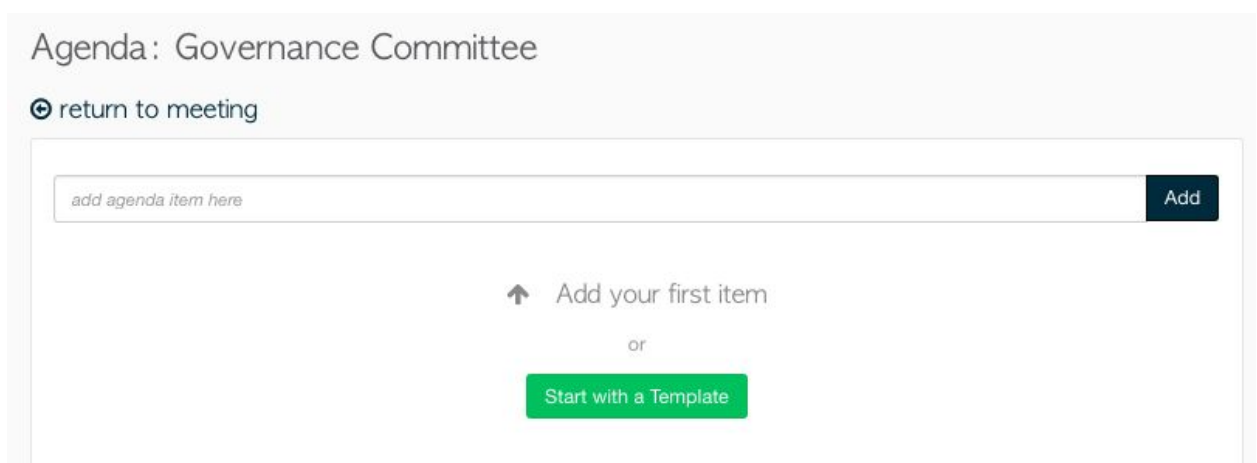
As a meeting collaborator, member, or administrator you can now build an agenda and save it as a template. If you don't have a template that you like, we have also provided you with three default templates to choose from.

## Build your agenda

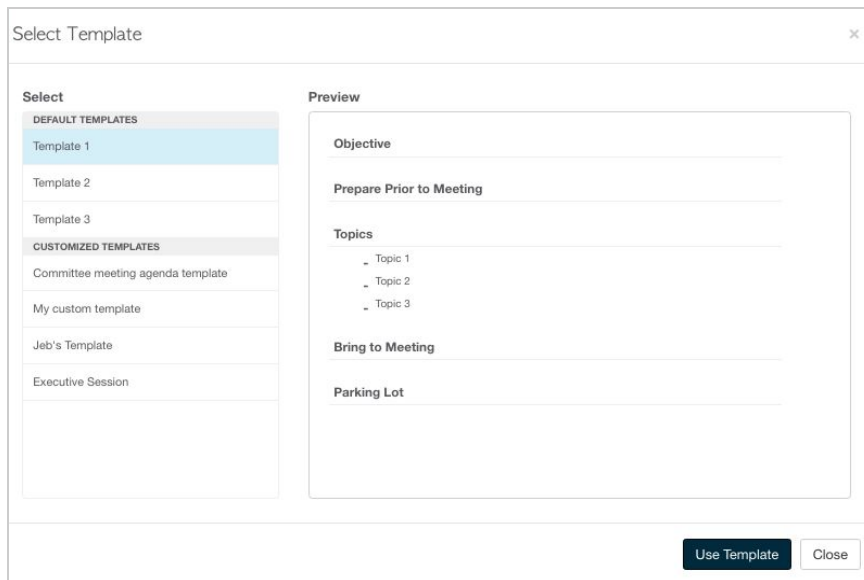
To build a new agenda, create a meeting and select **Build Agenda** on the right-hand side of your screen.



After you select **Build Agenda**, you will have the option to start adding items or to start with a template.



You will see that there are three default agendas and customized templates (if you have previously created any) to choose from.

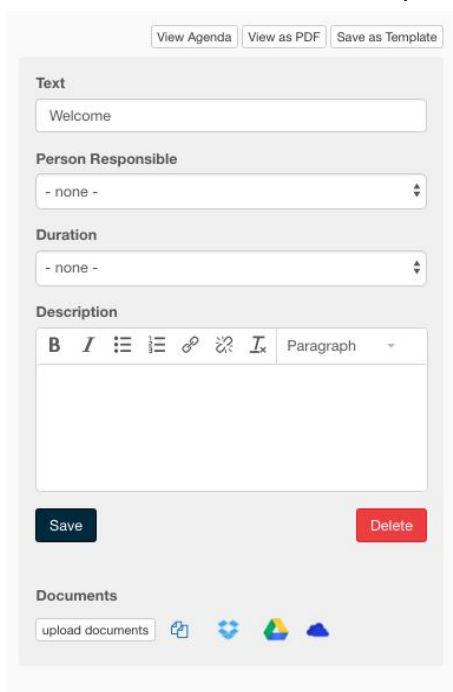


The 'Select Template' dialog box is divided into two main sections: 'Select' and 'Preview'. The 'Select' section on the left contains two lists of templates. The first list, 'DEFAULT TEMPLATES', includes 'Template 1' (highlighted in blue), 'Template 2', and 'Template 3'. The second list, 'CUSTOMIZED TEMPLATES', includes 'Committee meeting agenda template', 'My custom template', 'Jeb's Template', and 'Executive Session'. The 'Preview' section on the right shows a sample agenda structure with fields for 'Objective', 'Prepare Prior to Meeting', 'Topics' (with sub-items 'Topic 1', 'Topic 2', and 'Topic 3'), 'Bring to Meeting', and 'Parking Lot'. At the bottom right of the dialog are two buttons: 'Use Template' and 'Close'.

Select the one you want and click **Use Template**.

## Editing/building agendas

Each item or sub-item in the agenda can be assigned a person responsible, a duration, a description, and can have one or multiple documents attached to it.



The agenda item editing form is a vertical stack of fields and controls. At the top are three buttons: 'View Agenda', 'View as PDF', and 'Save as Template'. Below these are the following sections: 'Text' with a text input field containing 'Welcome'; 'Person Responsible' with a dropdown menu showing '- none -'; 'Duration' with a dropdown menu showing '- none -'; 'Description' with a rich text editor toolbar (containing bold, italic, bulleted list, numbered list, link, unlink, and text color icons) and a text area; 'Save' and 'Delete' buttons; and 'Documents' with an 'upload documents' button and icons for Google Drive, OneDrive, and Dropbox.

After you have completed your agenda you can choose to view it as a landing page, view as a PDF, or save as a template.



### 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/email, you can select "**Send message to meeting members**" and check the box to include meeting details or to attach the agenda as a PDF.

A dialog box titled "Send a message" with a close button (X) in the top right corner. It contains an "Email Subject" field with the text "Finance Committee". Below this are two checkboxes: "Include meeting info" (checked) and "Attach agenda as PDF" (unchecked).

### Taking personal agenda notes

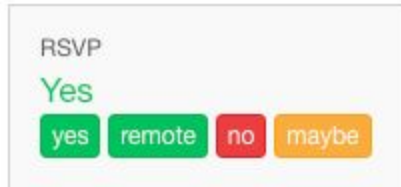
All meeting members can also take personal notes by opening the agenda landing page and selecting an item to add notes to.

The image shows a screenshot of an agenda landing page on the left and a "My Notes" sidebar on the right. The agenda has two items: "1. Welcome &amp; Introductions" by ZACHARY ALEXANDER and "2. Bylaws Discussion". The "Welcome &amp; Introductions" item has a list of attachments: "Add Person to Directory Screenshot.PNG", "Desert.jpg", and "CHIP YP General Meeting Agenda- November 2017.docx". The "My Notes" sidebar shows a note for "Welcome &amp; Introductions" with a yellow background and an "Add note" button. Below the agenda items, a third item "3. Committee Updates" is partially visible, with a sub-item "1. Community Relations" by BRITTANY FLORENTINE. A blue arrow points to the "1" next to "BRITTANY FLORENTINE".

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

## 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.



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.



## 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.



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

## Polls

### Changing the due date for a poll

The due date of a poll can now be changed.

Click **edit** and update the due date and description from the screen below:

**Edit Poll**

This poll is locked because some members have submitted their answers. You can still edit the due date and description below.

**Due Date**

07/19/2018 1:45 PM

**Description**

**B** *I*

- 

- 

[Link](#) [Unlink](#) I\_x Paragraph

Save cancel

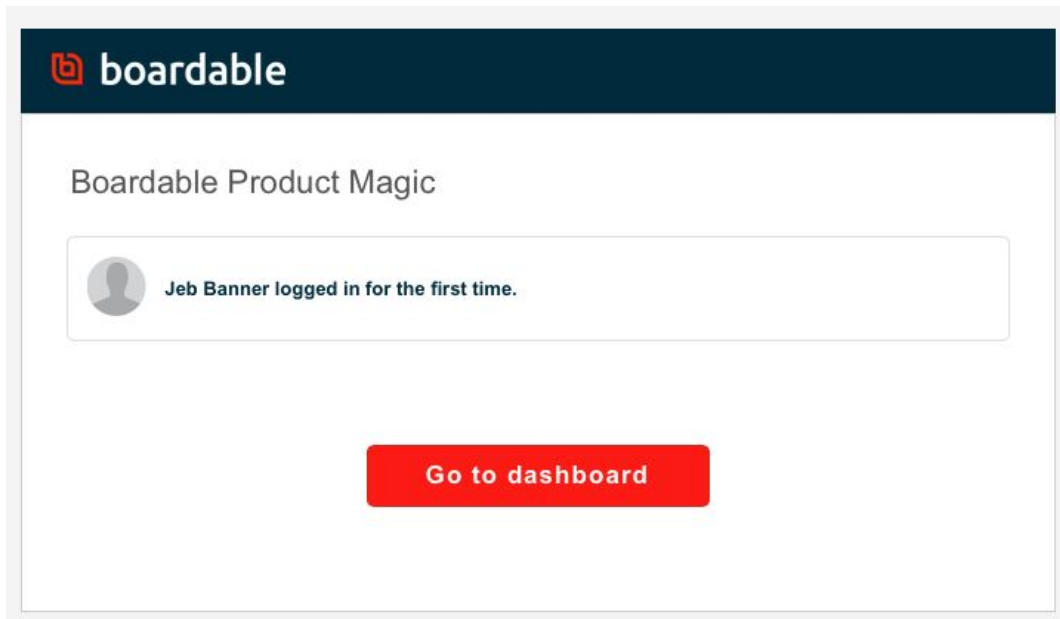
Note: once your members submit their answers, the selection of people included in the poll cannot be changed.

## People Directory

Updates have been made to the people directory to include engagement information for the account owner and administrators.

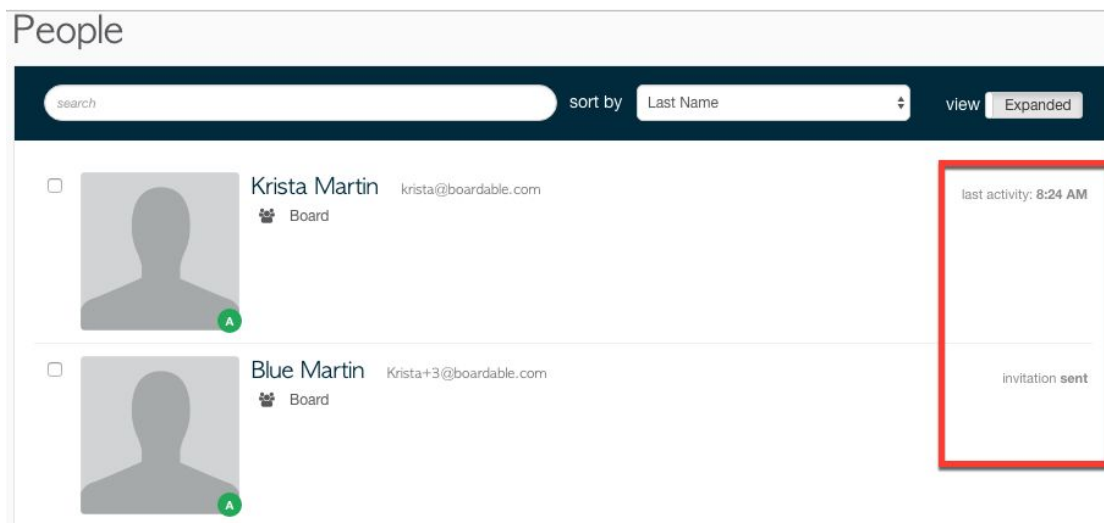
### Email notification for first time login

Account owners will receive an email notification when a user has logged in for the first time.



## User activity or invitation status

Administrators can view the status of welcome invites and recent activity by user in the people directory.



## Search Upgrades

Updates have been made to the document search to include the recent timestamp for the document.