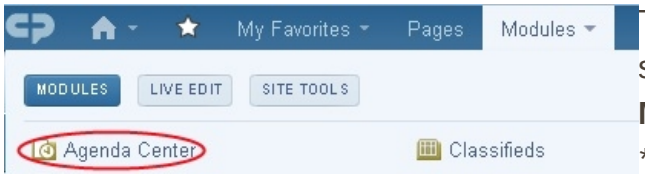
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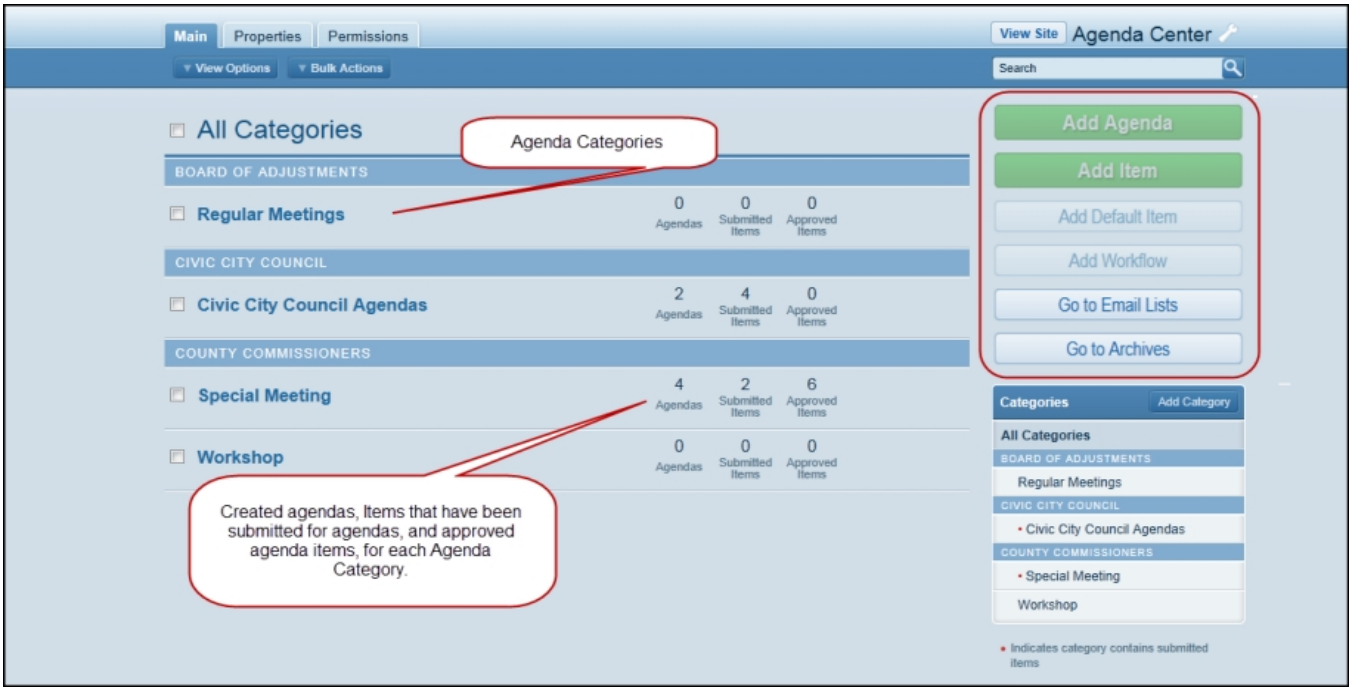
The CivicPlus Agenda Center offers an uncomplicated way to create and display agendas for various civic organizations. The Agenda Center can create agenda templates for repeated use, work flows to insure agenda accuracy, and the ability to enter minutes directly into each agenda. This functionality is combined with the ability to customize both the creation and organization of the Agenda Center.



To navigate to the Agenda Center on the back side of your CivicPlus site, click **Modules**, then **Modules**, then **Agenda Center**.
**Note the name of the Agenda Center can be customized depending on local needs and will be explained later in this document.*

The Agenda Center main page appears displaying all categories that have been created for each group, along with any agenda categories within those groups. From this main page new categories can be created. Properties are also set for the Agenda Center itself and permissions given to various groups for the Agenda Center.

Notice the grayed out areas in the image below. These items are not available until you are in an Agenda Category and ready to create or modify an agenda.

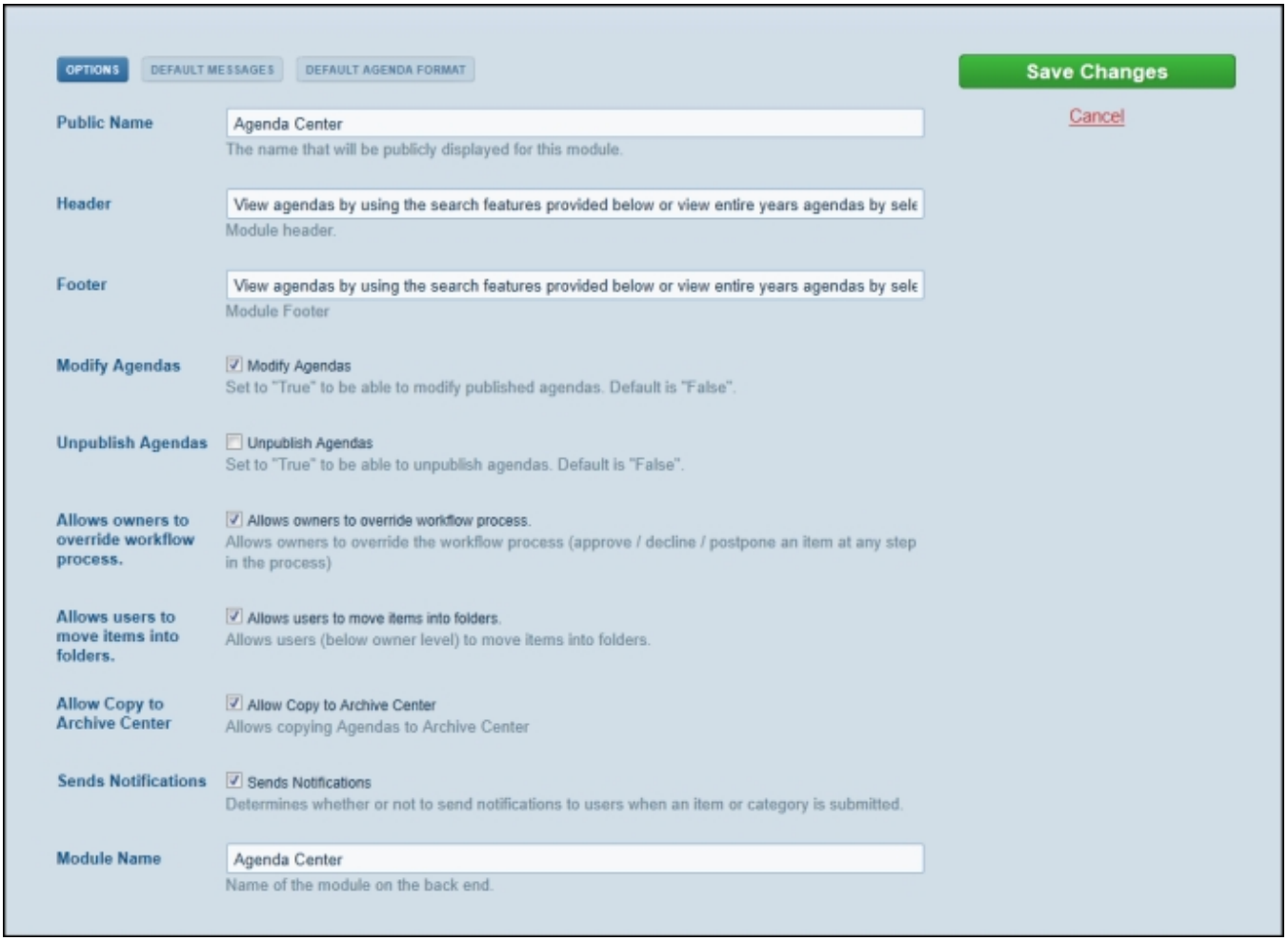


Properties

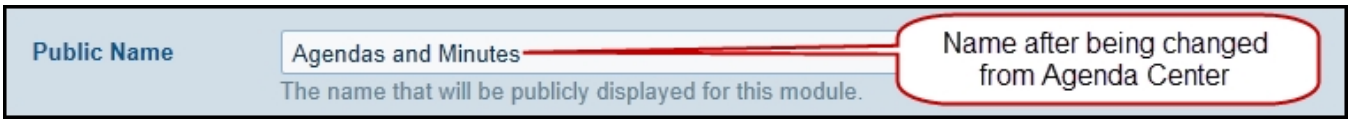
Under the Properties Tab you can customize the public side as well as the back end of the Agenda Center. Under Properties global options such as, Default Messages, and Permissions can be set.

Options

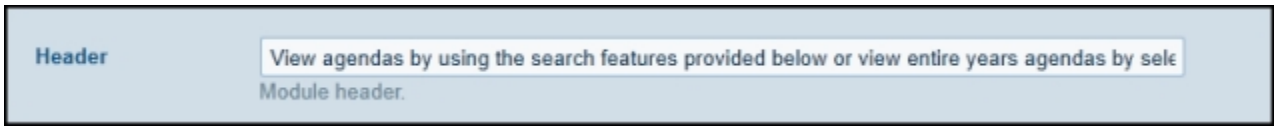
In Options you can customize the Agenda Center's public side, and also create rules related to the creation and customization of agendas. The various sections of the Option Section will describe on the following pages.



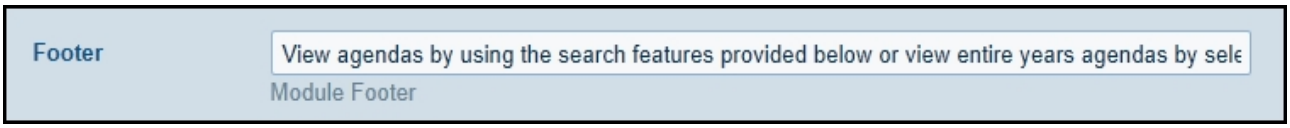
- **Public Name** will rename Agenda Center on the public facing side of your CivicPlus site. Simply remove the default text (Agenda Center) and give the module the desired name you want displayed to the public.



- **Header** field displays the text that displays in the Header Section of the public facing Agenda Center module. Remove and type in the text you want the public to see.



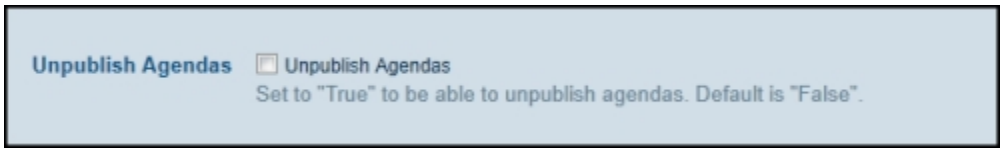
- **Footer** is the same as Header. This field displays the text that displays in the Footer Section of the public facing Agenda Center module. Remove and type in the text you want the public to see.



- **Modify Agendas**, checking this box allows for the modification of published agendas. If local rules and regulations prohibit any modification of published agenda's, do not select this item.



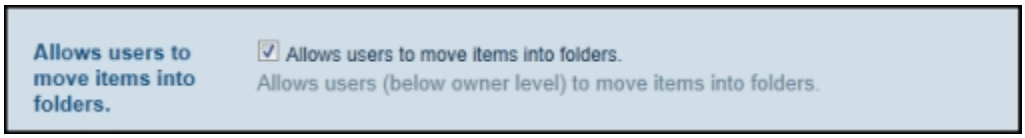
- **Unpublish Agendas** allows agendas that have been published to the live site to be returned to unpublished status to be removed or modified. If local rules and regulations prohibit any modification of published agenda, do not select this item.



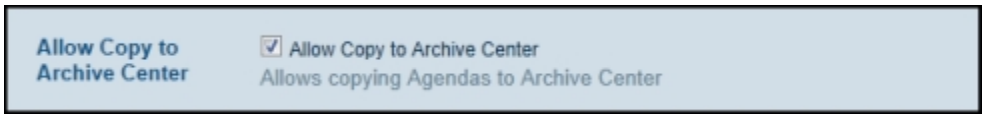
- **Allows owners to override workflow process.** CivicPlus Agenda Center allows for the creation of workflow or approval processes. Selecting this item will allow Owners and System Administrators to override the workflow when necessary.



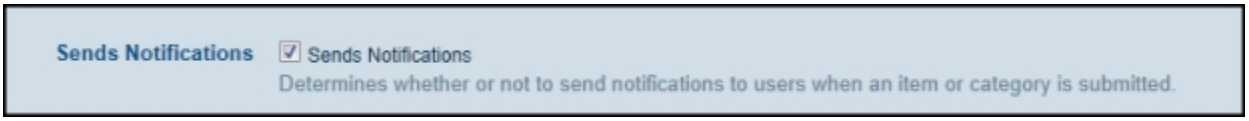
- **Allows users to move items into folders**. Authors and Publishers perform different functions in the Agenda Center than in other modules within the CivicPlus site. Selecting this item will allow users below the owner level to move agenda items into agenda folders for better agenda item organization.



- **Allow Copy to Archive Center**. Selecting this item will allow agendas to be copied to the Archive Center.



- Sends Notifications selecting this option will notify System Administrators and someone who has ownership rights to the Agenda Center itself notification when a new agenda category is created. It will also send System Administrators, an Agenda Center Owner, and an Agenda Center Category Owner notification when a new agenda is created.



- Module Name will change the name of the Agenda Center module in the back end of your CivicPlus site. This name change would appear in the Module drop down as seen below.





- Once Save Changes has been selected the changes will appear on the public side and back end side.

**Note: An image of the public facing Agenda Center Module with the new Public Name appears on the next page.*

Agenda Minutes, Meeting Videos, and Downloads of Agendas, Minutes, or complete packets are available to the public from this page. Location of this page on your CivicPlus is determined by you as any other page would be. For more information on placement of your Agenda Center module on your CivicPlus site please contact Customer Support.


New Agenda Center Name.
Header Text
Agendas and Minutes
View agendas by using the search features provided below or view entire years agendas by selecting the desired year displayed next to the category. Minutes and videos relating to an individual agenda will be displayed by an icon for the related agenda created.
Tools
RSS
Notify Me
Agendas can be searched for by date range, time period, (last week, month or year) or by a word or phrase within the desired agenda or minutes.
Search Agendas by:
Time Period
Word or Phrase
Select a Category
Civic City Council
Various Agenda Categories and Agendas
Civic City Council Agendas
2011
Agenda
Minutes
Videos
Download
Sep 26, 2011
Civic City Council Meeting for September 26, 2011
Download
County Commissioners
These Category Headers can be added by you after contacting CivicPlus Customer Service
Special Meeting
2011
Agenda
Minutes
Videos
Download
Sep 26, 2011
test
Download
Sep 23, 2011
this is my email test
Download
Sep 17, 2011 — Amended Sep 20, 2011
test with headers
Download
Sep 17, 2011
test with headers
Download
Footer Text
View agendas by using the search features provided below or view entire years agendas by selecting the desired year displayed next to the category. Minutes and videos relating to an individual agenda will be displayed by an icon for the related agenda created.
Back to top

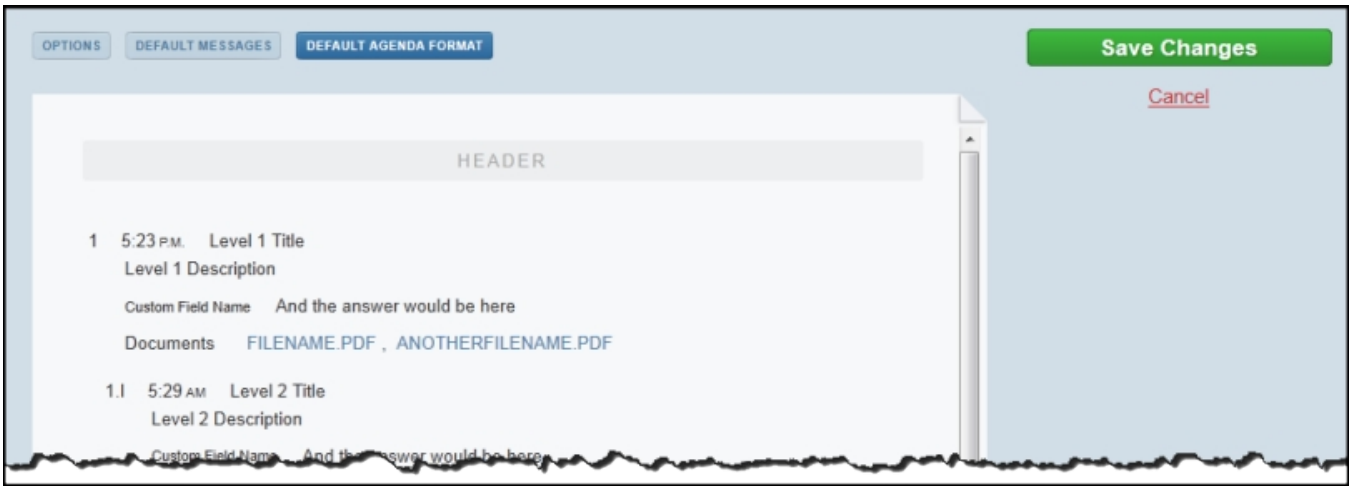
Default Messages

Default Messages are the alerts the public receives via e-mail or SMS text message when new agendas are posted to the public site, once someone has signs up for Notify Me. For more information about setting up these Default Messages and the Notify Me module please review the CivicPlus Notify Me manual in CivicPlus University.

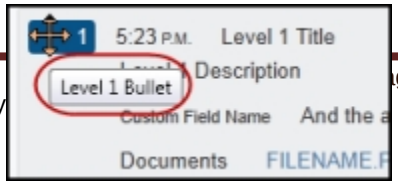
- When changes are made to the Default Message click **Save Changes.**

Default Agenda Format

The Default Agenda Format section allows you to set the format of the agendas created in the Agenda Center. Items that can be set up are item numbering styles, font styles and sizes, how far each sub item is automatically indented from the previous item and spacing from the bottom item to the next item. Once the default format is set, the format will then be past to all new agenda categories when they are created. However, when a new category is created this format can be overwritten if the need arises.



To set Default Agenda Formatting



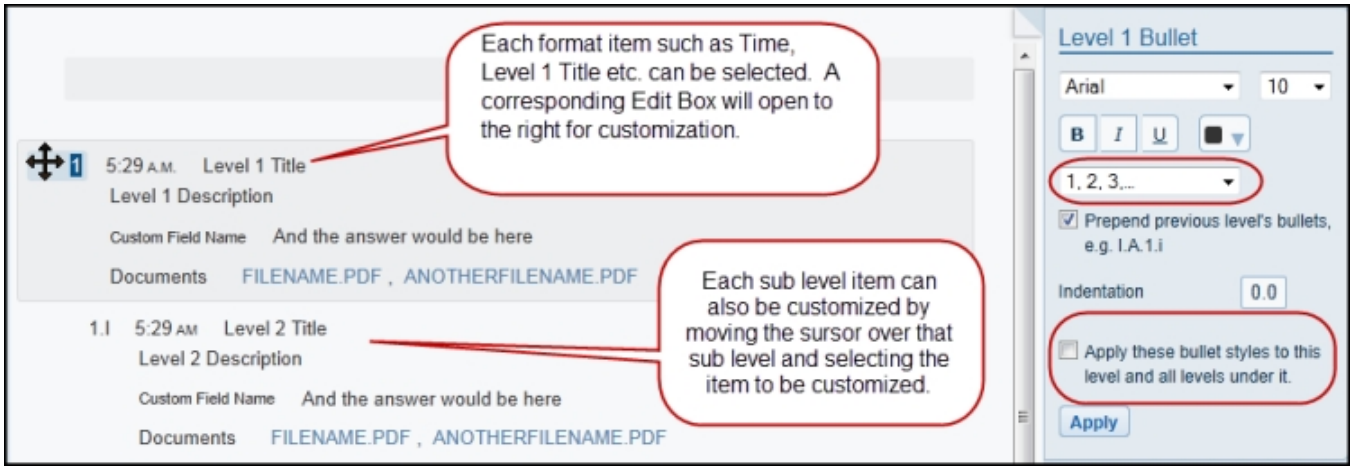
- Place your cursor over an item on the default agenda item you wish to set or change. The item will become highlighted and a text box will appear showing the name of the Item you are about to change. Click the highlighted area. (In this example the level one bullet point is highlighted)

- After selecting the area being adjusted, a selection box will appear to the right of the Default Agenda work area.

- Select the new style to be used. (In this case a different bullet numbering style)

- Select **Apply these changes to this level and all under it**, to apply the items selected in the edit box to all sub items under the highlighted item you are editing in the Default Agenda.

- To Apply all changes click **Apply**

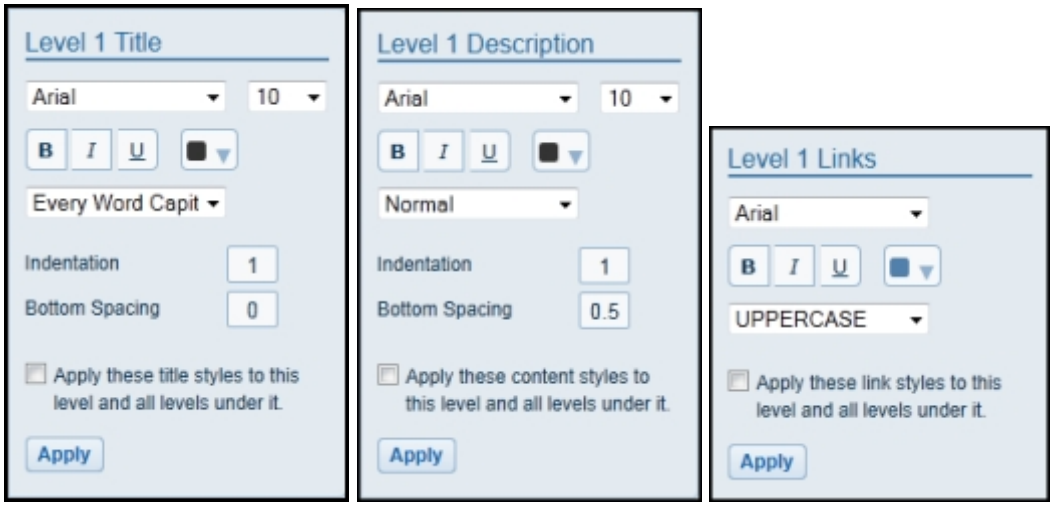


*Important Note: ***when editing bullet styles****, you do not need to select the Apply these bullet styles to all levels under it. Selecting **Apply** in the bullets editing box will change all sub styles.*

*Selecting, ***Apply these bullet styles to all levels under it****, in the bullet editing box will apply the Indentation settings. Since the top level item is set to 0 indentations all sub items will also be moved up to a 0 indentation as well. Meaning each sub level will not have any indentation. The default indentation level for each sub item is a multiple of 1.5. For example the first sub level is set at 1.5, the second level is at 3, third level is at 4.5 etc.*

- Once all the styles have been set in the Default Agenda, click **Save Changes**. This will then apply these default styles to all the various Agenda Categories.

Other Agenda Style Editing Boxes



Permissions

Assigning permissions to various groups in the Agenda Center functions similarly as it does throughout the CivicPlus site. Assigning Permissions from the main tab will give that group rights to the entire Agenda Center.

It's recommended to go into each Agenda Category and assign Permissions for a group to that category, rather than giving a group, global rights to all agenda categories in this main permission area.

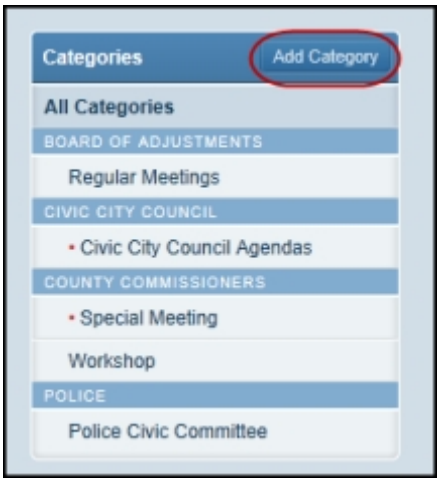
Author, Publisher, and Owner have different permissions in the Agenda Center, compared to the rest of the CivicPlus site.

- **Author** only has the right to create agenda items to go into the agenda itself. The Author level does not have the ability to create an agenda.
- **Publisher** can take the approved submitted agenda items from the Authors, plus any default agenda items explained later in this manual, and create an agenda. The Publisher can only Save and Submit agendas for approval; the Publisher cannot publish completed agendas to the public facing side of your site.

- **Owners** have full rights to their group's agenda categories, but the Owner, and System Administrator are the only permission levels that can publish a completed agenda to the front side of your site. Also the Owner has the right to override any work rules that have been created for that agenda category. (see page 4 of this manual)

Creating Agenda Categories

Before an agenda can be created a Category must be created to house the agenda. It is recommend that each group using the Agenda Center have its own category.



- In the right side menu column, in the dark blue ox,

Add Category

The Category creator will open.

The tabs across the top of the page allow access to the different agenda creation and customizing sections. Using these default items will aid the ease and speed of each subsequent agenda for that category.

Each tab will be discussed in the follow sections.

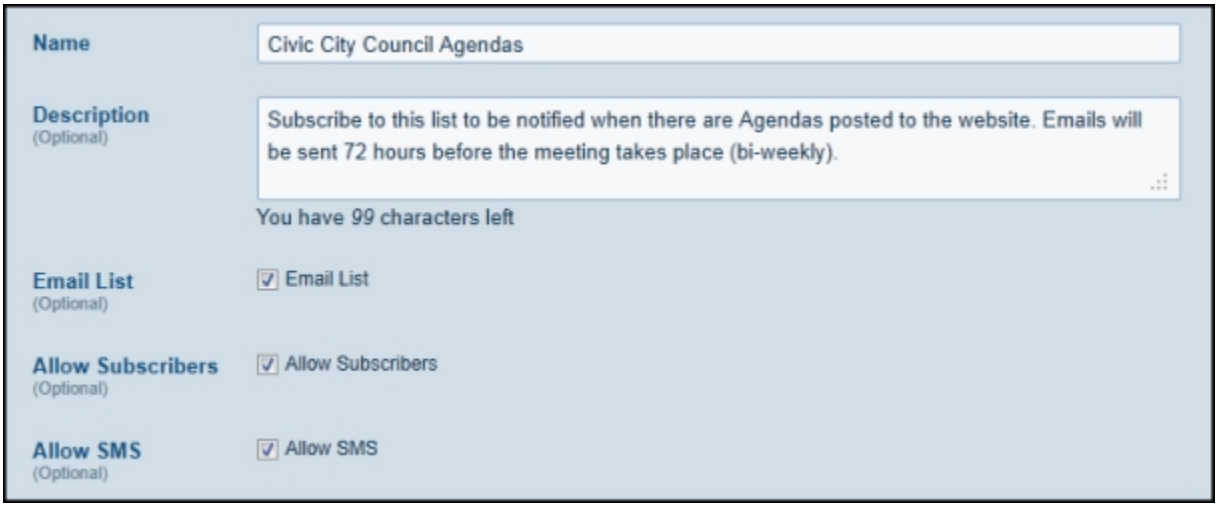


Properties

Basic Category set up is under the Properties tab. Due to the size of this page, each section will be broken down and described below.

- **Name** is the name of the agenda category that appears on the Agenda Center page on both the front and back end of your site.
- **Description** is the description that appears for this agenda category on the public side of your CivicPlus site in the Notify Me section. This is to give the public a brief description of the category they are requesting agenda information. This section may also be used to set expectations when notifications will go out. This section has a maximum of 255 characters.
- **Email List** allows the public to receive email notifications when a new agenda is posted.
- **Allow Subscribers** allows the public to subscribe for auto notifications in Notify Me.
- **Allow SMS** will send text messages to the subscribers. The users text rate will apply.

**Note for more information about auto notifications, please see the Notify Me manual in CivicPlus University.*

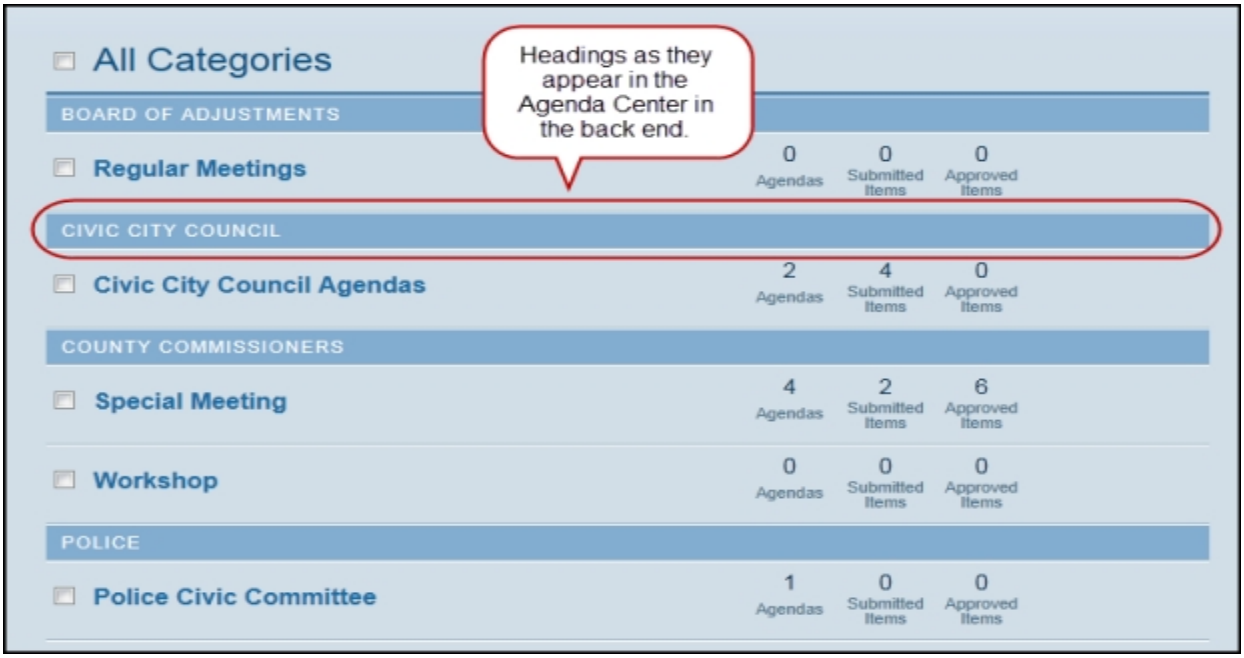


- **Heading** creates the category headers that appear on both the back and front end of the Agenda Center Module.
    - Select the Category Header from the dropdown selections.
    - If the Category Heading you wish to use does not appear, select **Other** from the drop down list. A text box will appear so a new category heading title can be entered.



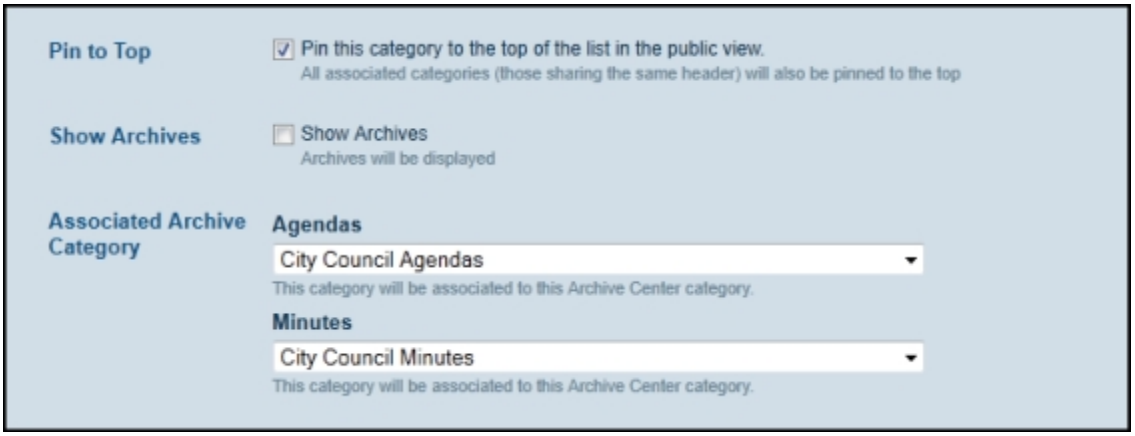
Note an example of these Headings as they appear on the back end and live site are shown on the next page. These may not be turned on by default for your site. Contact CivicPlus Customer Service to turn headings on, or off, so they can be seen, or not seen, both by you and the public.* ***It is very important to note that if category headers are added after categories are created, categories could potentially be lost.*

Headings will not appear on the front end of your CivicPlus site if there is not a published agenda in that category.

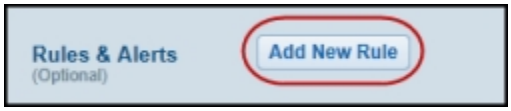

All Categories
Headings as they appear in the Agenda Center in the back end.
BOARD OF ADJUSTMENTS
Regular Meetings
0 Agendas
0 Submitted Items
0 Approved Items
CIVIC CITY COUNCIL
Civic City Council Agendas
2 Agendas
4 Submitted Items
0 Approved Items
COUNTY COMMISSIONERS
Special Meeting
4 Agendas
2 Submitted Items
6 Approved Items
Workshop
0 Agendas
0 Submitted Items
0 Approved Items
POLICE
Police Civic Committee
1 Agendas
0 Submitted Items
0 Approved Items


You are here: Home > Agendas and Minutes
Agendas and Minutes
Tools
RSS
Notify Me
Headings as they appear on the live site. There has to be a published agenda in the category for the heading to appear on the public side.
Search Agendas by:
Time Period
Select a Category
Civic City Council
Civic City Council Agendas
2011
Agenda
Minutes
Videos
Download
Sep 26, 2011
Civic City Council Meeting for September 26, 2011
Download
County Commissioners
Special Meeting
2011

- **Pin this category to the top of the list in the public view** will move the category, and any other category sharing the same header, to the top of the Agenda Center on the public side.
- **Show Archives** will create a Show Archive for the category on the back side of your CivicPlus site allowing you to see **all** revisions of each agenda.
- **Associated Archive Category** use the drop downs to select the categories the published agendas and minutes may be copied to in the Archive Center. Each dropdown will contain all categories in the Archival Center.



- **Rules & Alerts** will create rules (reminders) for agenda items. For example, if an item has been submitted but not reviewed by the next person, the Agenda Center will generate an email directing an action. To create rules:
  - Click **Add New Rule** to open the rule editor box.



  - Select the number of Days, Weeks, or Months that if no action is taken on an agenda item an alert will be sent.
  - In the "**after"** dropdown field, choose the item action associated with the rule
    - item is submitted
    - item is postponed
    - item is declined
    - item is returned to submitted
  - In the "**and"** dropdown field, choose what will create an alert email.
    - **No Other Criteria**, means to automatically send an email after the specified time and action.
    - **No Action Taken,** after the agenda has been submitted, postponed or declined and there has been no action an email will be sent.
  - **To:** enter the email address to be notified.
  - **Message:** enter the message or instructions for the email recipient.
- Click **Add New Rule** to open another rule editor box for the creation of additional rules as needed.

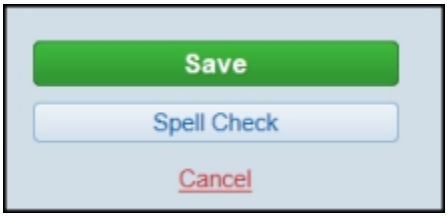


- **Permissions** give access to the appropriate groups to the specific agenda category.

***Note Permission Levels in the Agenda Center have differing abilities than in other modules on the CivicPlus site.*

  - **Author** has the permission to create agenda items to go in the agenda. The Author level does not have permission to create an agenda.
  - **Publisher** can take the approved agenda items from the Authors, plus any default agenda items and create the agenda. The Publisher can only save and submit agendas for approval; the Publisher cannot publish completed agendas to the public site.
  - **Owners** have admin rights for their group agenda categories. The Owner and System Administrator can publish a completed agenda to the front side of your site. Also the Owner has the right to override any workflow rules that have been created for that agenda category, if that selection was made in Permissions.

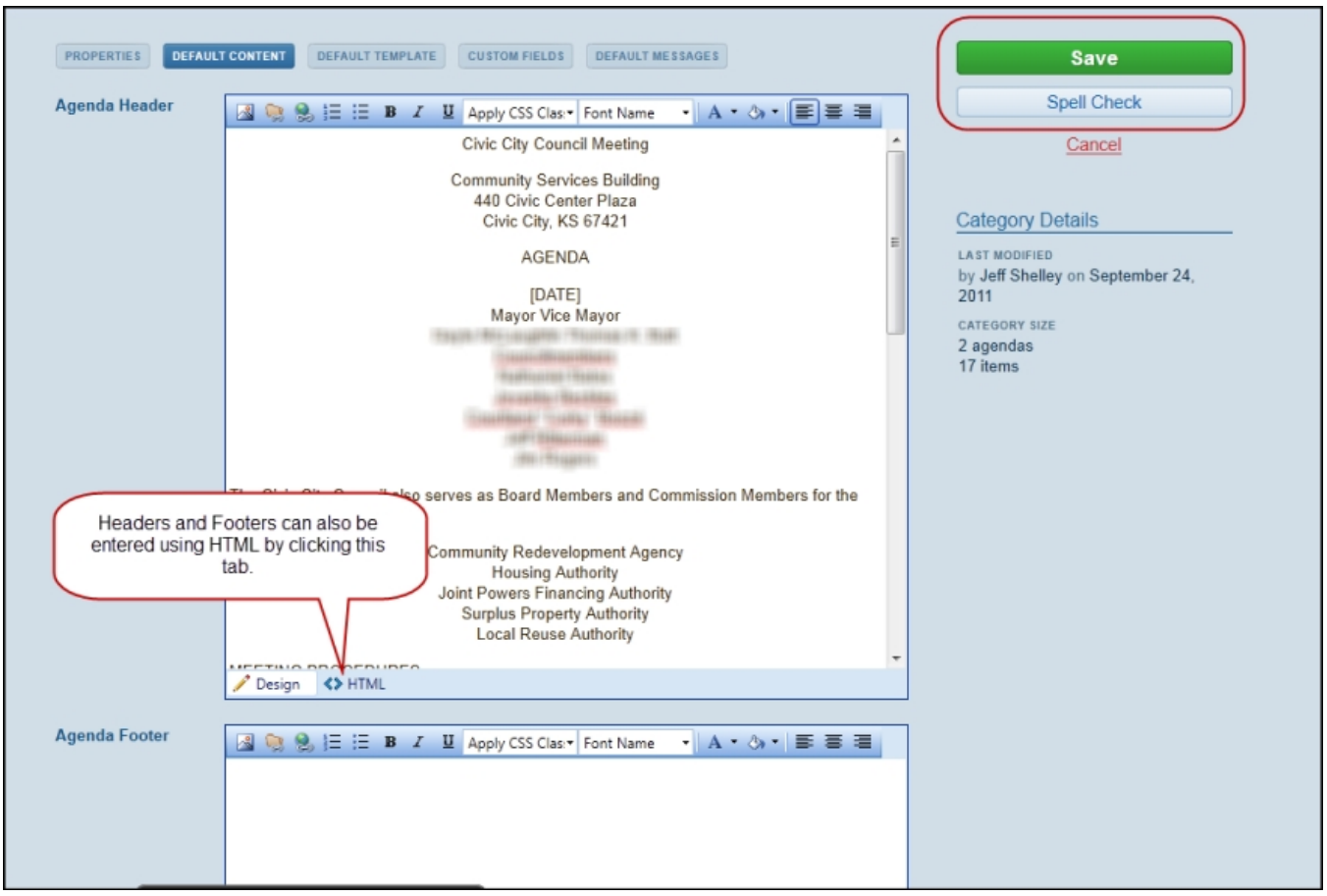
- Click **Save** when the category properties are complete.



Default Content

The Default Content tab creates the Agenda Headers and Footers that will automatically display in each agenda for that category. The default headers and footers can be modified in each individual agenda as needed.

- In the text editor boxes type in the header and footer content desired. Use the editing tools in the text editing box for such items as uploading images, bolding text, or hyperlinks.
- Click **Spell Check** to identify and correct any spelling errors that may exist.
- When complete, click **Save**.

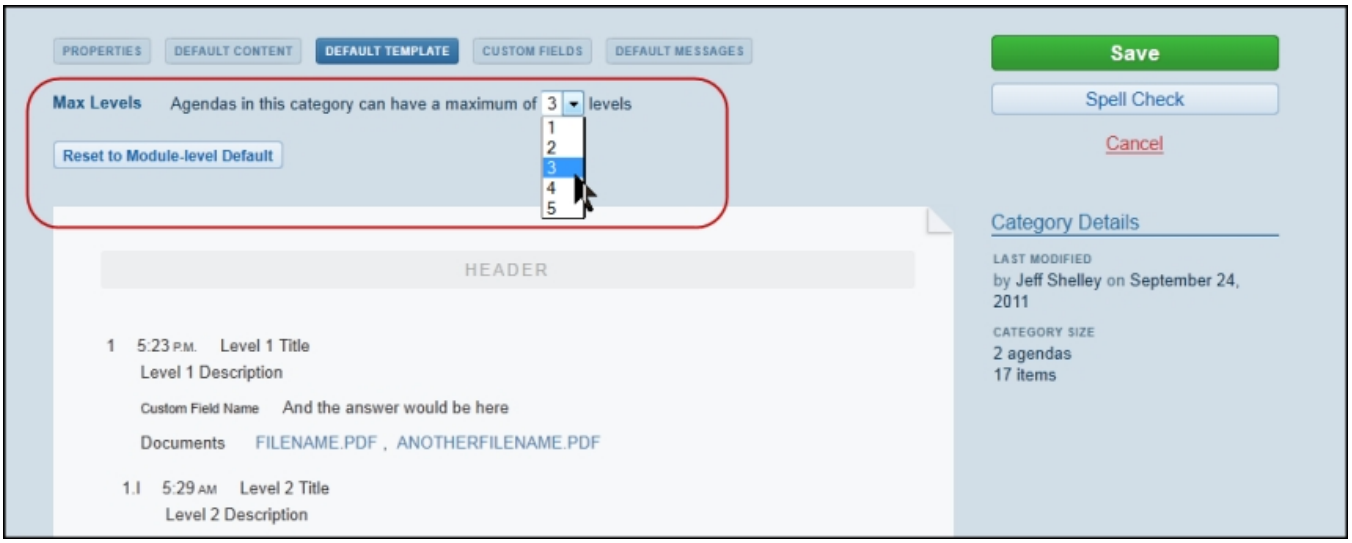


Default Template

The Default Template for the Agenda Center will automatically be used as the default template the agenda category. To change the default template for the category use the same procedures starting on page 8 of this manual.

There are two additional items in creating the Category Default Agenda Template.

- **Max Levels** will restrict the number of sublevels for each agenda item. Using the drop down select between one and five sublevels.
- **Reset to Module – level Default** will restore the category default settings to those of the Agenda Center agenda default.
- Once the Category Default Agenda has been created click **Save**.



Custom Fields

Custom Fields allows you to create additional fields to display when adding items within the category. Any additional custom fields that are populated on the Add Item screen will also appear on the agenda when you add the item to the agenda. You will have the option to make custom fields required and set populated drop down lists, radio button and checkbox fields.

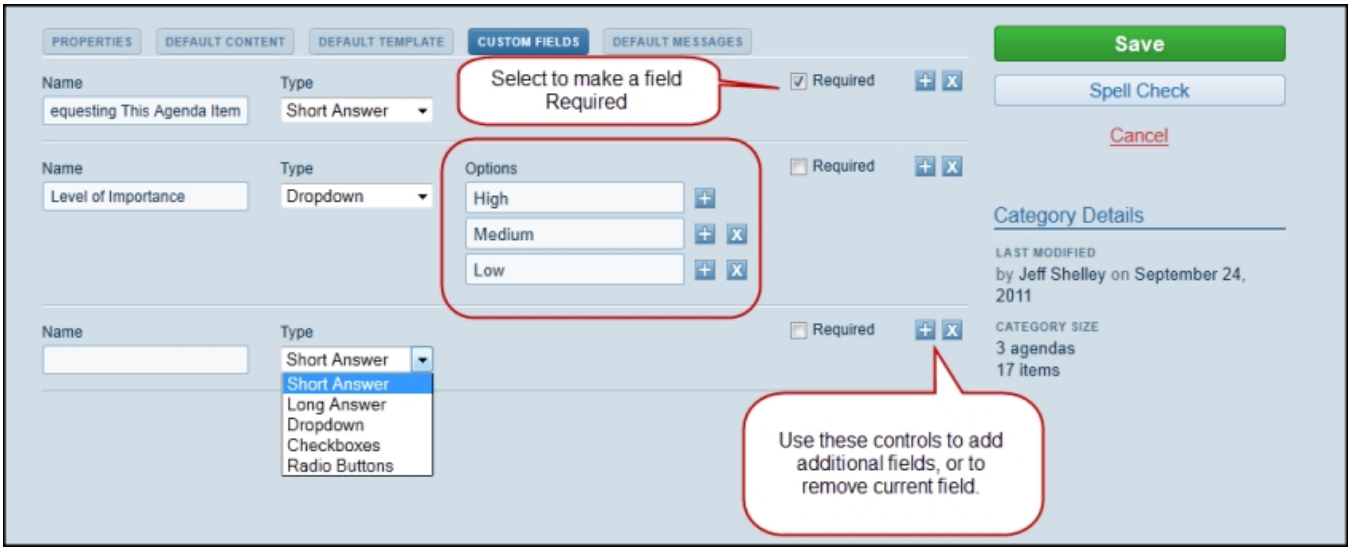
- To add a custom field click **Add a Field**



- In the **Name** field type in the name or question for the field.
- Choose the type of answer field you want to use;
  - Short Answer
  - Long Answer
  - Dropdown
  - Checkboxes
  - Radio Buttons

**Note: The creation of dropdown, checkboxes and radio button fields are similar to each other. Therefore only dropdown will be shown, but the same process will apply to all.*

- Select the answer type from Type dropdown menu
- Click on the desired type
- If Dropdown, Checkboxes or Radio Buttons are selected an Option field will open.
- Type in possible selections. To add additional selections click the plus sign next to the option box.
- If additional fields are needed click the plus sign next to the Required box.



- Click **Save** to add fields to the Add Agenda Item Page.

Partial view of the bottom of the Add Agenda Item Page with custom fields added.



Default Messages

Default Email and SMS text messages can be created to notify the public once individuals have signed up in the Notify Me module. To see how to set up these messages see the Notify Me Manual in CivicPlus University.

Modifying an Agenda Category's Preferences

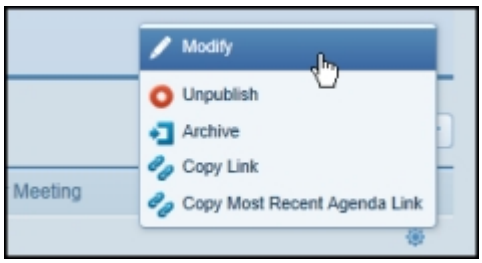
From the Main Agenda Center Page, click the name of the Agenda Category to be modified.



- Across from the agenda category title is a gear icon. As your cursor goes over the icon the icon will change to Action. Click **Action**



- A window will appear with all the available actions. Click **Modify** to return to the Agenda Category's preferences section.



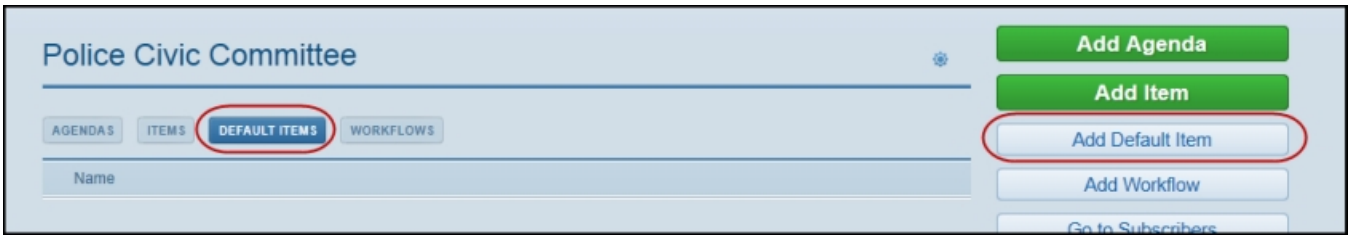
**Note: To delete an agenda category, it must first be unpublished. Once the category is unpublished, Delete will become an option in the action window.*

Creating Agendas

Default Items

Items that are repeatedly used in agendas can be pre setup so they can be easily added to an agenda. Only Owners and System Administrators can add these items.

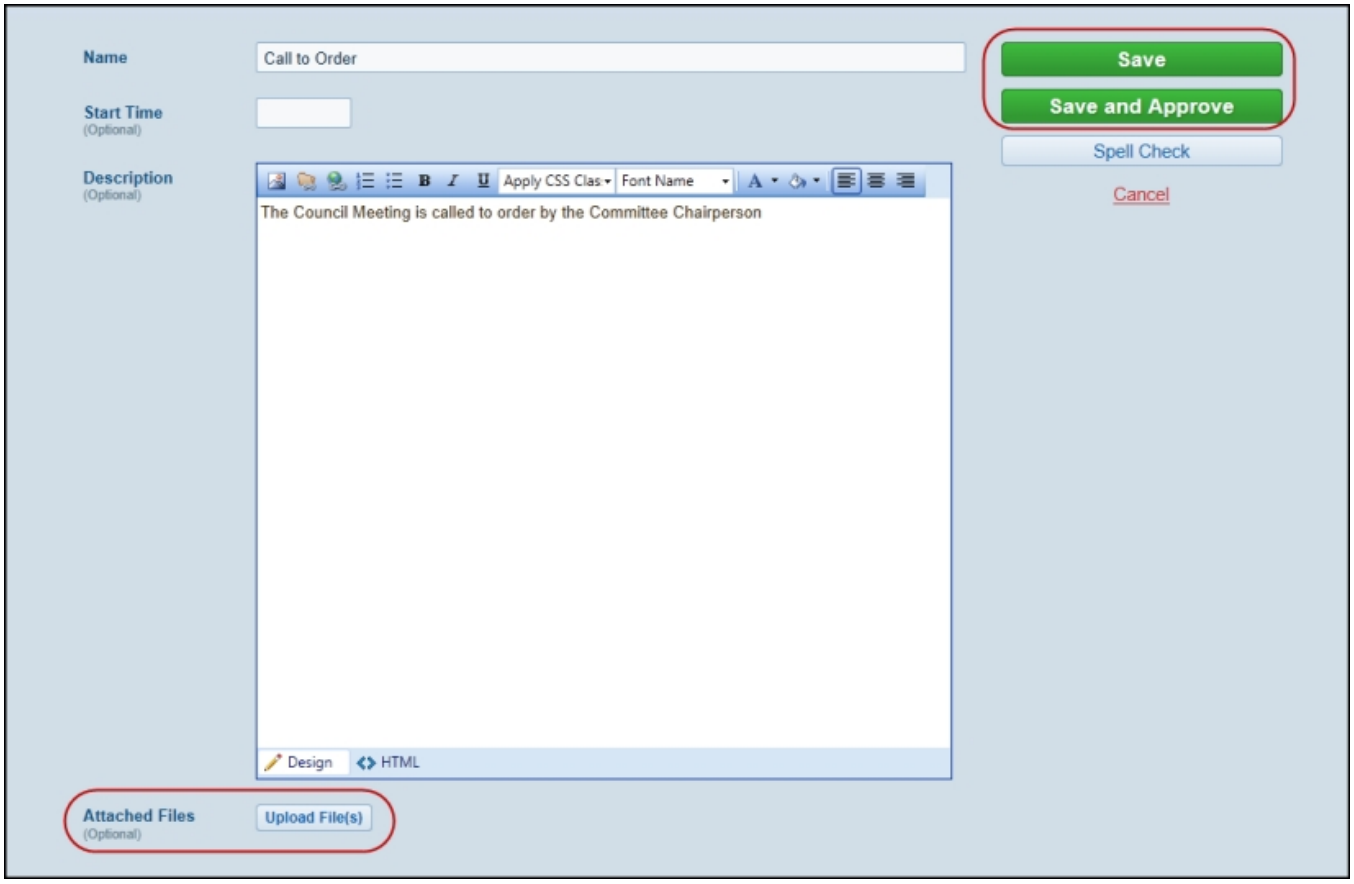
- From the Add Agenda page, select **Default Items**
- Click **Add Default Item**



- Enter the Name of the Default Agenda Item
- If desired enter a Start Time for the item
- A text box is available for a Description of the Default Agenda Item
- To Attach Files to the agenda item:
  - Click **Upload Files**, and then **Browse**.
  - Select the file to be uploaded from your computer. Multiple files may be uploaded at the same time by holding down the control key on your keyboard as you select the files.
  - Click **Upload**.
- Click **Save and Approve**.

The Default Agenda Item will then be available to add to any agenda by dragging it and dropping it in place without having to reenter the item each time an agenda is created.

The Add Default Agenda Item window appears on the next page.



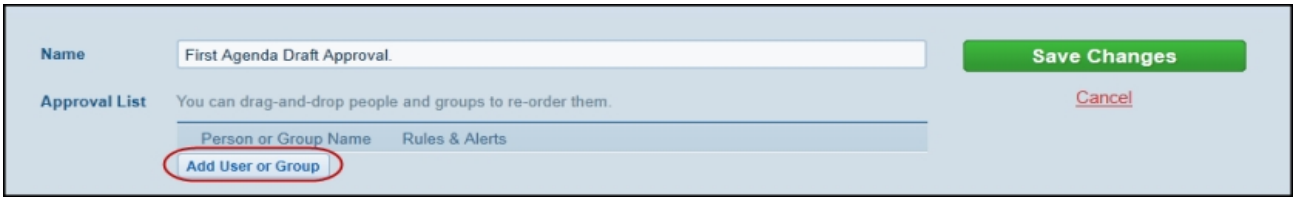
Workflows

Workflows create an approval process for the items created in each agenda to ensure that the proper groups or people approve agenda items before they are added to an agenda.

- From the Add Agenda page, click **Workflow**, then select **Add Workflow.**



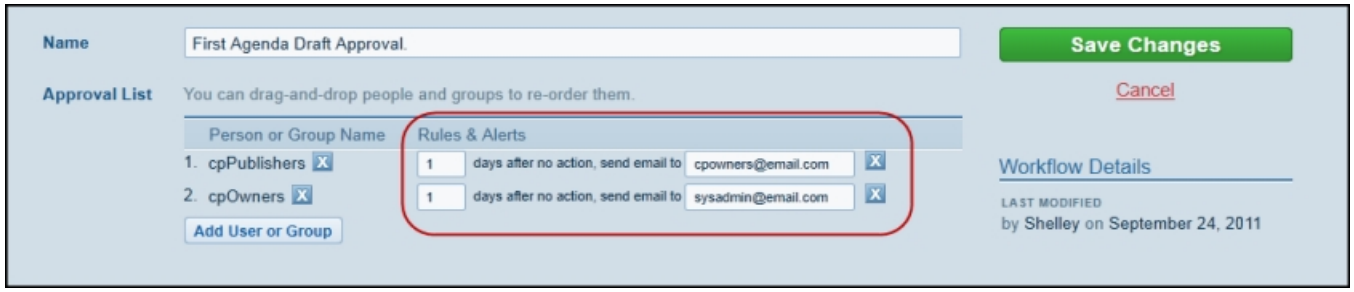
- Name the Workflow being created.
- Add users or groups to the approval list by clicking **Add User Group**.



- The Approval Name field will open. Start typing the name of the person or group that needs to be added to the approval process. Possible matches from the User and Group Administration section will appear.
- Select the correct match by clicking the name.
- To add additional groups or people to the approval process click **Add User or Group** again, and repeat the same process.
- Adding rules to the approval process helps ensure that agendas move through the approval process in a timely manner. To add a rule to each person or group in the approval process, click **Add Rules** next to the name.



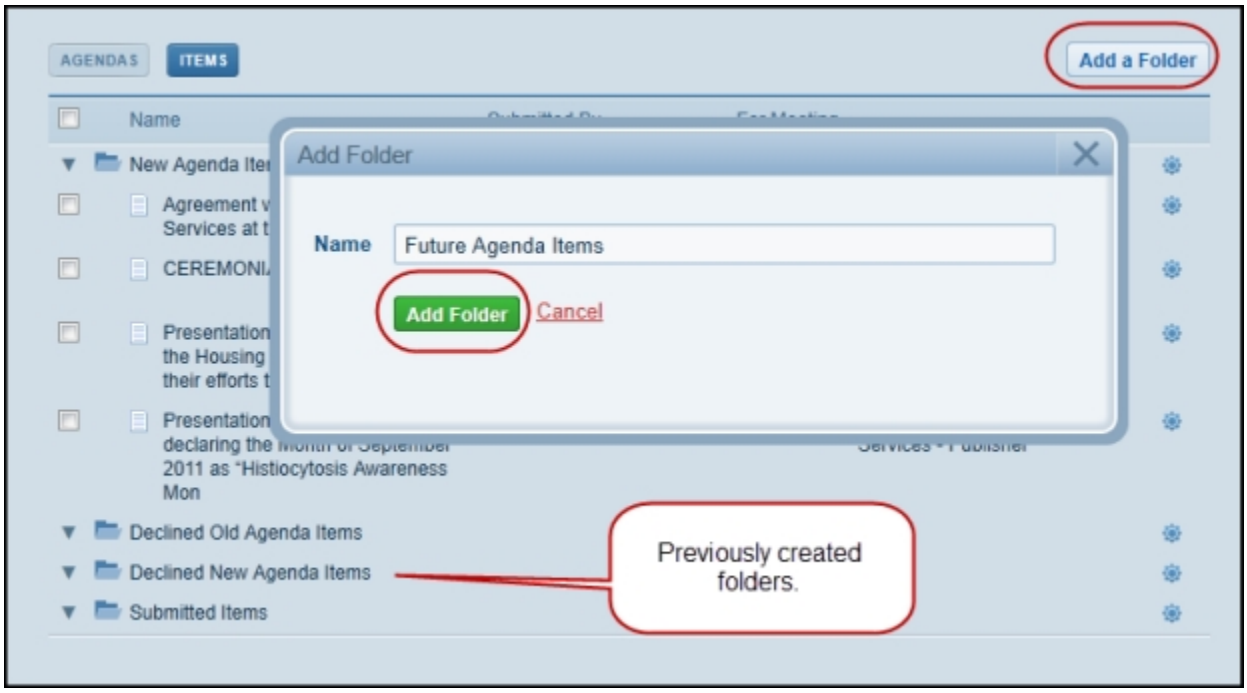
- Enter the number of days to wait with no action taken before an email is sent.
- Enter the email address of the person to notify if no action has been taken.
- Select **Save Changes**.



Folders

Folders can be used to organize agenda items. Once agenda items are created they can be added to different folders for organizational purposes by dragging and dropping the item. These folders can be used to house approved or declined agenda items along with folders for future agendas.

- To create a folder click **Add a Folder**
- A pop up window will appear, enter the folder name.
- Click **Add Folder**
- The Folder will now appear under Items tab with the agenda items.

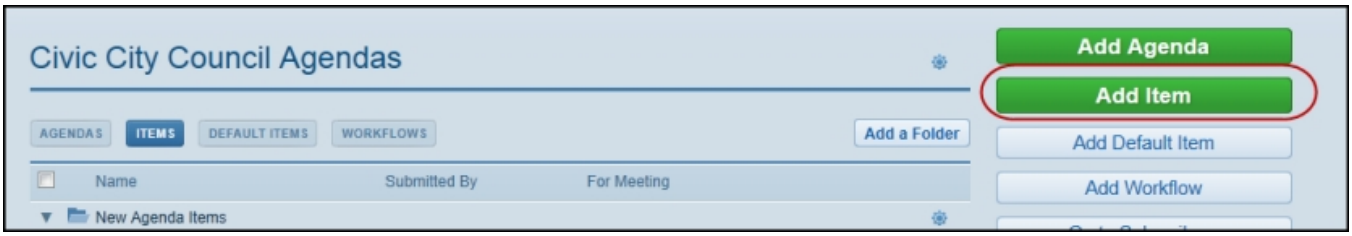


- Clicking the arrowhead next to the folder name will expand and close the folder. The arrowhead pointing down means the folder is expanded, pointed to the right means the folder is closed.

Adding Agenda Items

It is important to remember that starting with Adding Agenda Items, different permission levels, Authors, Publishers, and Owners will see different controls. For example, **Authors** will see **Add Item** but not the Add Agenda button. **Add Agenda** is only visible at the **Publisher** level and above. **Save and Submit** buttons will appear based on the workflow that is selected for that item.

- To Create Agenda Items, click **Add Items**

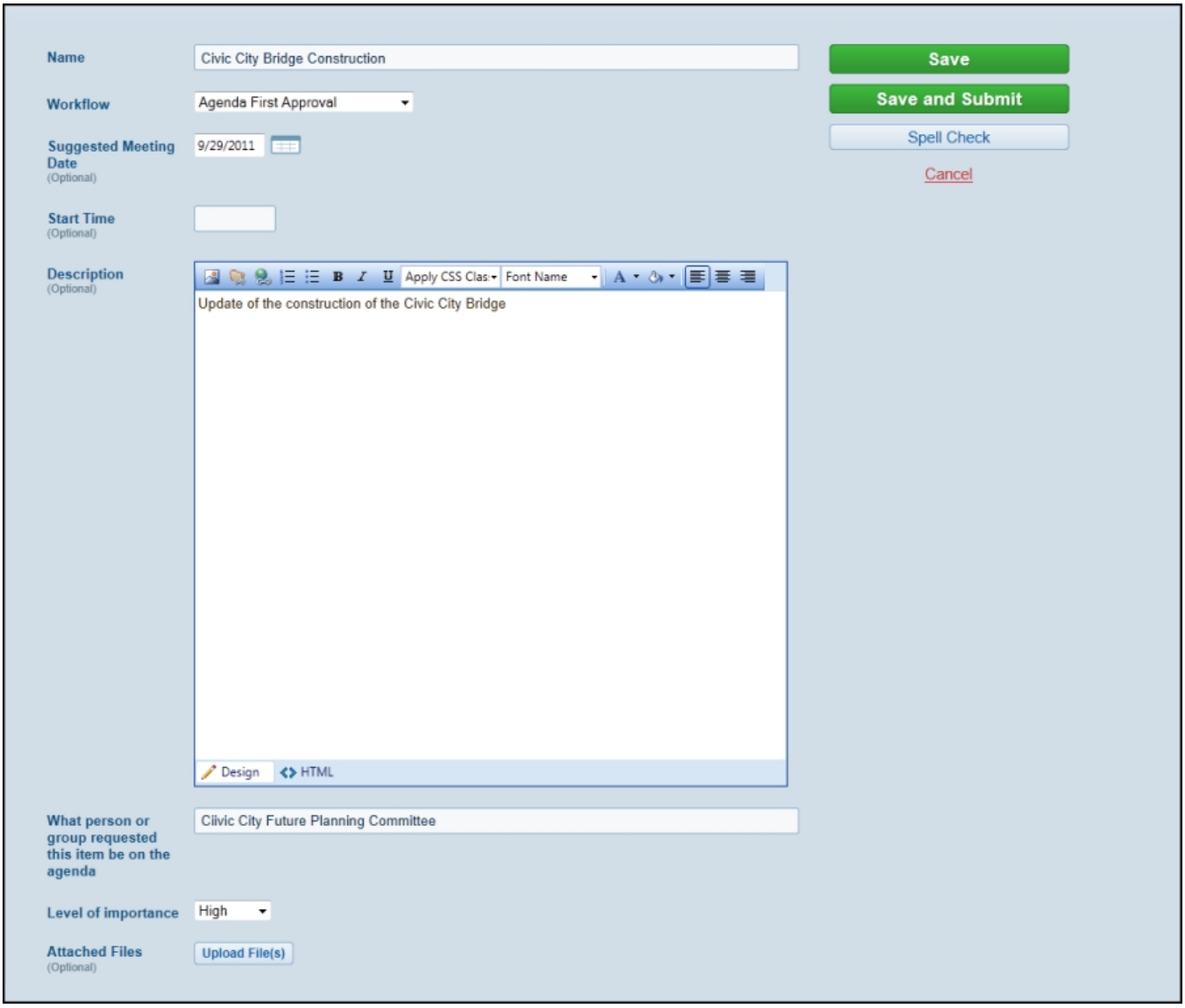


- Enter the name of the Agenda Item
- From the dropdown menu select the Workflow for the agenda item
- Enter the Suggested Meeting Date
- Enter the Start Time
- Enter a Description of the agenda item
- If any Custom Fields were created in preferences for the agenda category, enter that information
- Upload any files for the agenda item by clicking **Upload Files**

Any optional fields will be marked as (Optional). All other fields are required and must be completed before an item can be saved.

- Click **Save** to save the agenda item as a draft, allowing you to continue to make changes to the item.
- When the item is complete click **Save and Submit**. This will then save the item and notify the next person or group in the approval process.

Add Agenda item appears on the following page.

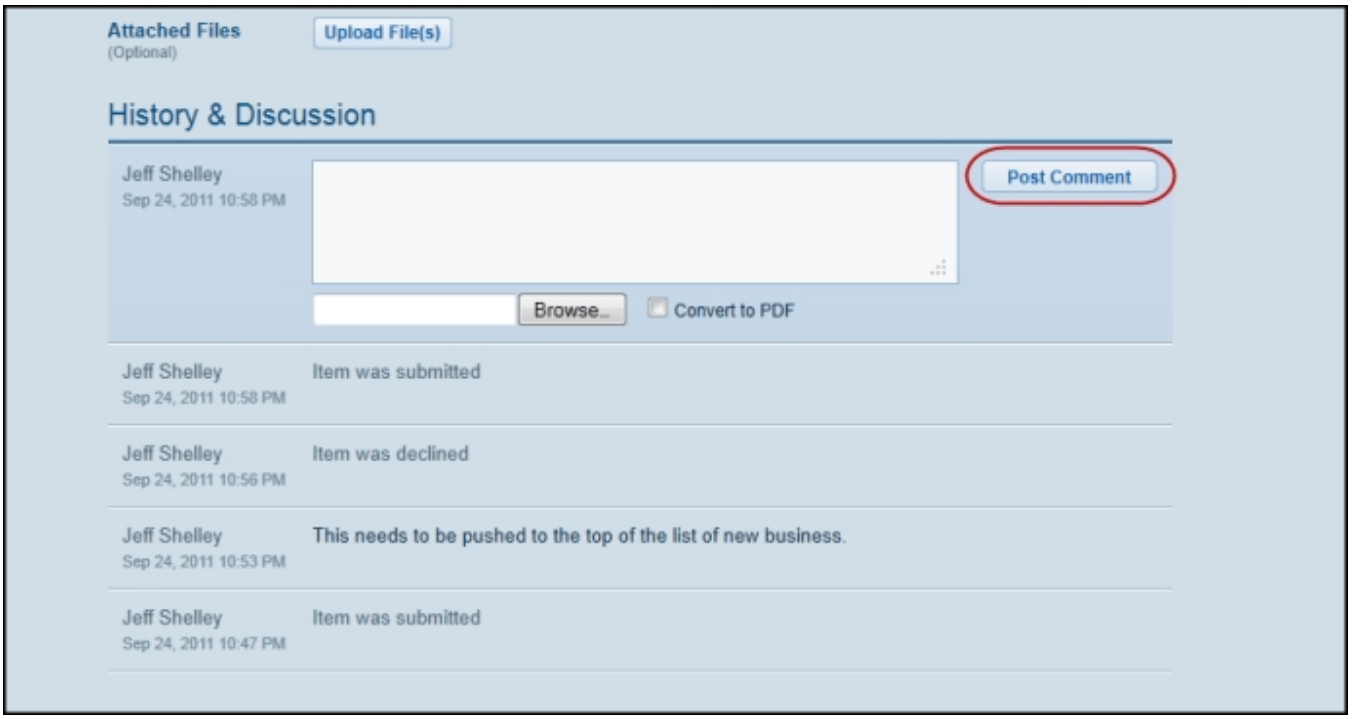


- To approve or disapprove an agenda item go to the Agenda Center
- Select the Agenda Category
- Under the Item tab the agenda item will be marked that it is waiting on approval, and name the person or group that needs to approve the item.

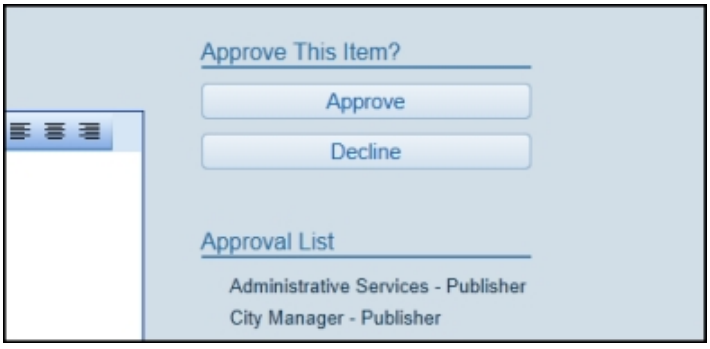


- Click the item name to open the agenda item for approval.

- Review the agenda item. The bottom of the Agenda Item Page will be a History and Discussion section. Enter any comments you may have about the agenda item. Click **Post Comments** to add them to the agenda item.



- Select **Approve** or **Decline.**
  - Selecting **Approve** will place the item in the list of items to be added to the Agenda Creator.
  - **Decline** sends it back to the agenda items list, marked declined appear in red. It can then be modified and resubmitted or deleted.

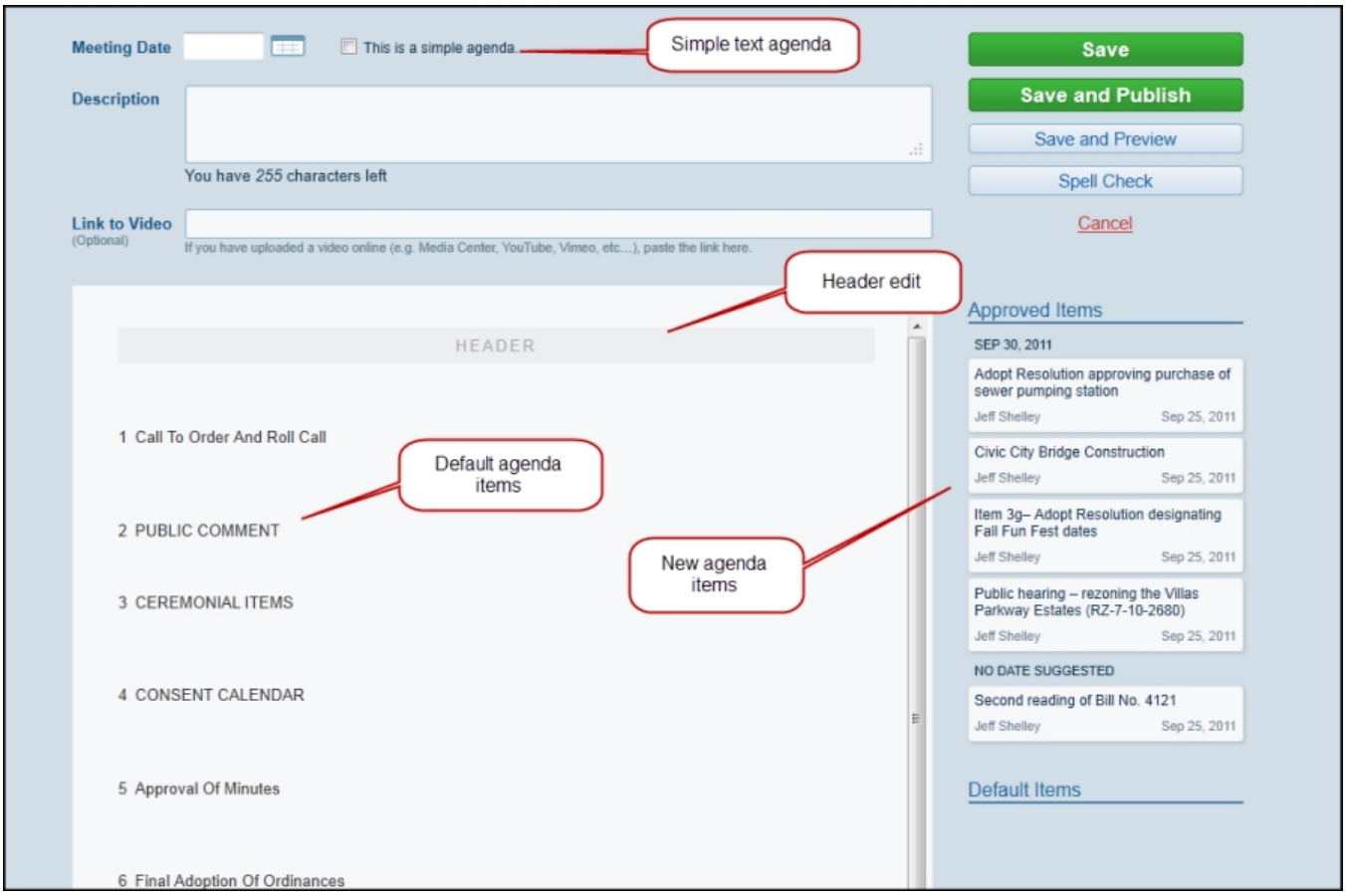


Create Agenda

- To add a new agenda to an agenda category, select **Add Agenda**



The Agenda Creation Page will open.

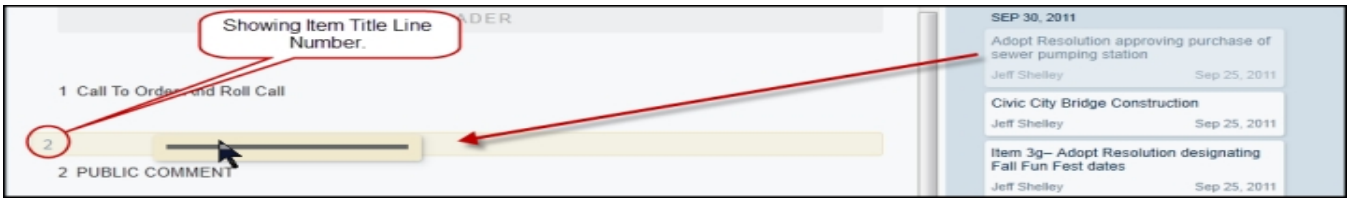


- Enter Meeting Date
- In Description enter agenda or meeting description
- If you have uploaded a video online either in the Media Center, You Tube etc. that you wish to use, paste the link in the Link to Video field.
- To edit or review the Default Header created under the Default Content tab, click **Header** in the agenda work bench to open the header text box. Make the appropriate edits then click the **Header** bar again to hide the edit box and save the changes.



- To add Approved Items, click on the item box in the right hand Approved Items section. Hold the mouse button down, and drag the item to the location you wish it to appear, then release the mouse button. The item will then drop into that location on the agenda.

    - If an item is released next to the left margin of the agenda work bench, it will be numbered as an Agenda Title item and take the next sequential number and renumber the rest of the items.



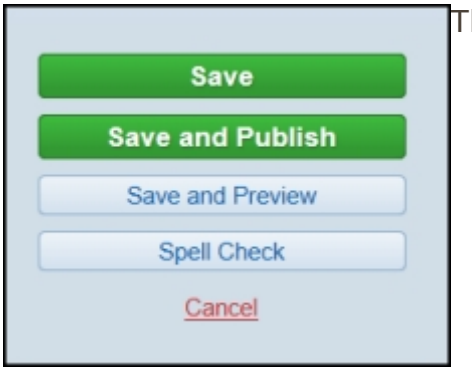
    - Items placed indented from the previous item will then become a sub item of the previous item on the agenda and numbered accordingly.



    - To change an item's location on the agenda work bench, click on the item and drag and drop it to the new location. The item will then be renumbered accordingly.

- To remove an item from the agenda, click the item and drag it back to the Approved or Default Items section.
- Once the items are placed in correct locations on the work bench, it will then open and display the items description and any additional field information that has been added.

- To see if the published version of the agenda will . This



Save and Preview will also create a draft version of the agenda that can be edited at any time.

- To save the agenda as a draft and close click **Save**
- To save the agenda and publish to the public side of your CivicPlus site, click **Save and Publish**. (or Save and Submit for those with Publisher permissions)
- When an agenda is published, a notification window will open to notify the public a new agenda item is posted. Your options to send the notification are;
  - Send on the Meeting Date.
  - Send Immediately
  - Send the notification X Number of Day in Advance.
    - ❖ Enter the number of days prior into the Days in Advance of the Date box.
  - Select, **Send, Don't Send** or **Cancel**. The notification will then send accordingly to those who have signed up in Notify Me for the selected Agenda Category.



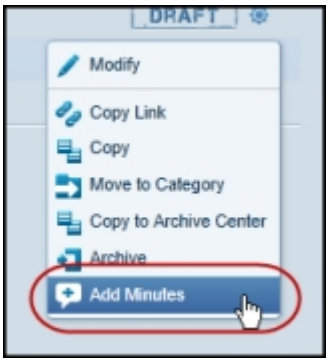
Adding Minutes

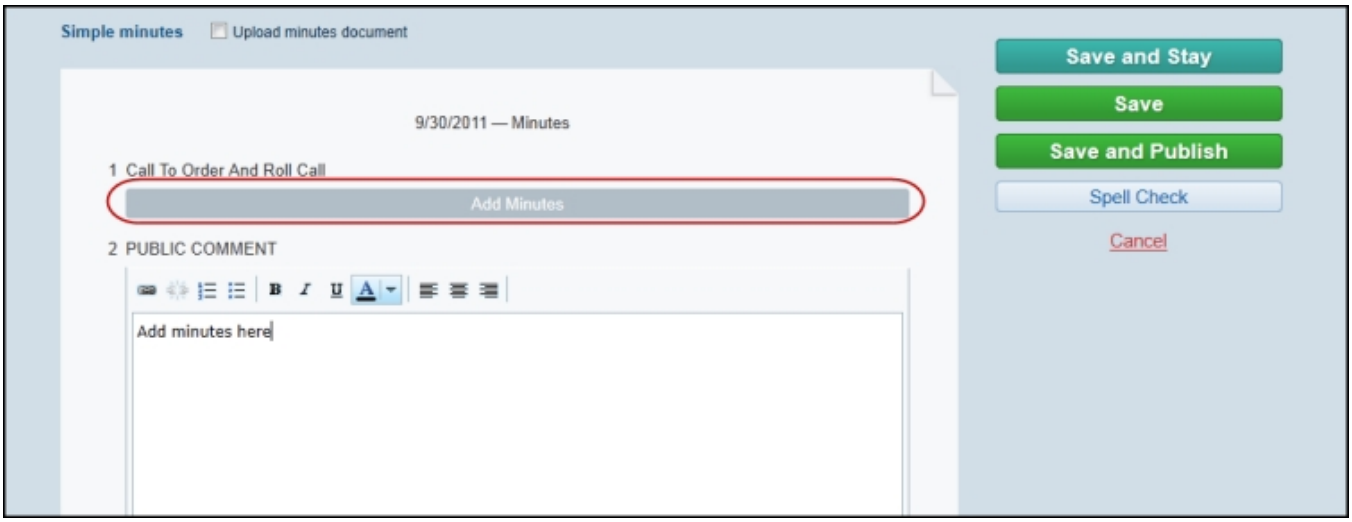
Agenda Center offers the ability to add minutes directly to a published agenda.

- On the main page of the Agenda Category select the **Agenda** button.
- On the agenda you wish to add minutes, hold your cursor over the gear icon so the Action button appears. Click **Actions**.



- The Action Item Box will open, select **Add Minutes**.
- The Minutes Work Bench will then be displayed. Click **Add Minutes** to add minutes to an agenda item.
- Click **Save and Stay**, to save your work and to continue entering minutes.
- Click **Save** to save the minutes in a draft form until they are approved.
- Click **Save and Publish** to publish the minutes to the public side.

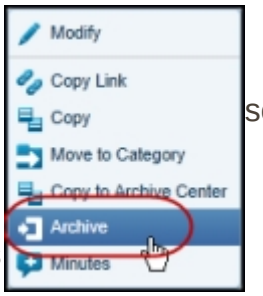




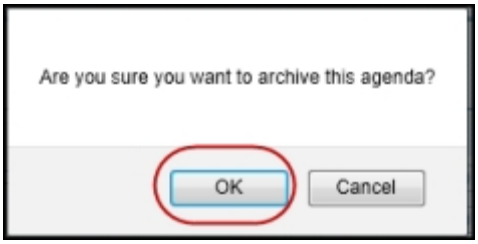
Archive Minutes and Agendas

To send Agenda and Minutes to the Archive Center;

- Open the proper Agenda Category
- Click **Agendas**
- On the agenda to be archived hold your cursor over the gear icon so Action appears, click **Actions**
- The Action Item Box will open. Click **Archive**



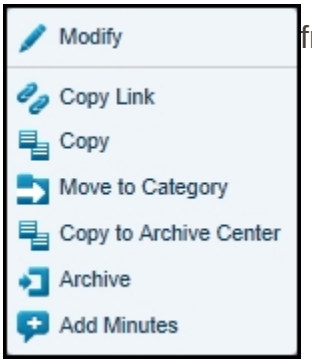
A Dialog box will open asking, Are you sure you want to archive this agenda? Click **OK**



- The Agenda and Minutes will then be moved to the Archive Center group you selected when setting up Agenda Group Preferences.

Other Action Box Items

- **Modify** allows for the modification or changes to an agenda.
- **Copy Links** will create links to be used in creating hyperlinks from other sections of your CivicPlus site to the agendas, or from websites like Facebook to the published agenda.
- **Copy** will make an exact copy of the agenda which can be modified and saved.



- **Move to Category** will move the agenda to a different agenda category.
- **Copy to Archive Center** will send a copy of the agenda and minutes to the Archive Center but will keep a copy of the agenda in the agenda category.
- **Archive** sends the agenda and minutes to the Archive Center.
- **Minutes** opens the Agenda Minutes Work Bench.