Using the Meetings Module.

The Meetings Module is an essential tool designed to streamline the organization and management of meeting information by sorting it by category and year. This guide will walk you through the functionalities of the Meetings Module to ensure you get the most out of this powerful feature.

Overview

The Meetings Module is structured to make the process of documenting and retrieving meeting information as efficient as possible. By categorizing meetings and organizing them by year, it provides a systematic approach that saves time and enhances productivity.

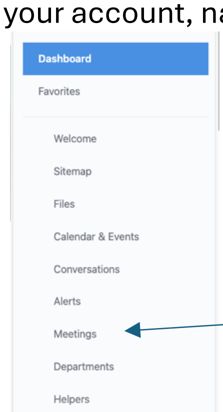
Default Meeting Location

One of the key features of the Meetings Module is the ability to set a default meeting location. This feature eliminates the need to repeatedly enter the same location details for every meeting, significantly reducing redundancy and ensuring consistency in your meeting records.

Getting Started

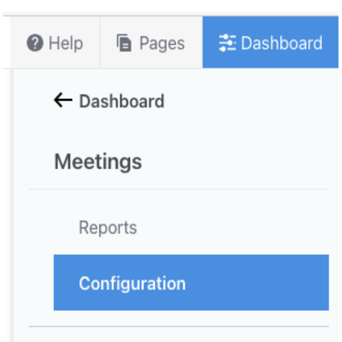
Accessing the Meetings Module

The Meetings Module must be accessed directly from the Dashboard. Once logged into your account, navigate to the Dashboard where you will find "Meetings".



Clicking here will take you to the main interface of the module.

Configuration



First: Set your Configuration

Entering Categories

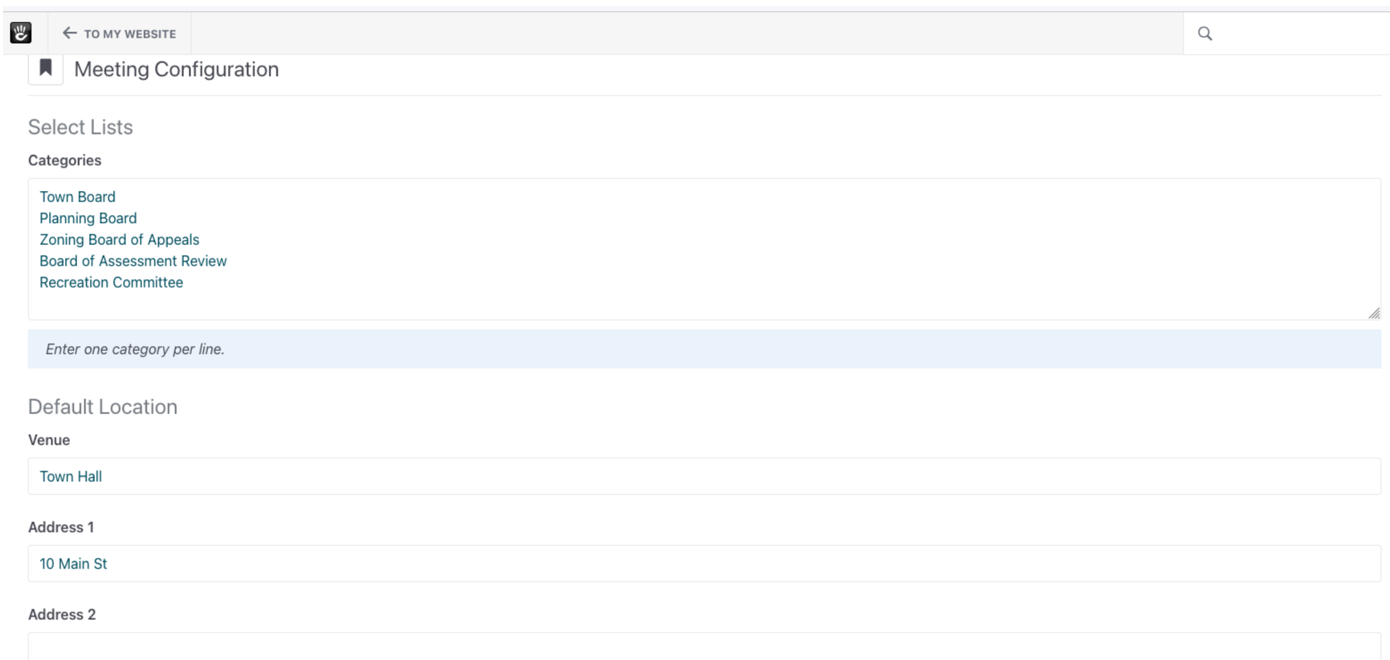
The first step in managing your meeting records is to set up the necessary categories. This involves listing all the Committees, Boards, or Organizations for which you will be posting agendas and minutes. If there is a group in this initial list that you do not need, you can delete it. Simply select it and remove it from the list. To add a new category, type the name of the category on the next available line in the list. Ensure that the category name is clear and descriptive to avoid any confusion in the future. Once added, the new category will be available for use when posting agendas and minutes.

Setting Up Your Default Meeting Location

In the 'Default Location' section, enter the address or name of the location you frequently use for meetings. This location will automatically appear in the location field for all future meetings, unless manually changed.

Overriding Default Location

Although the default location is set up for consistency, there might be instances where you need to change the location for a specific meeting. In such cases, you can override the default location by specifying the new location details in the meeting record. This flexibility allows you to manage meetings that are held at different venues without affecting the default setting.



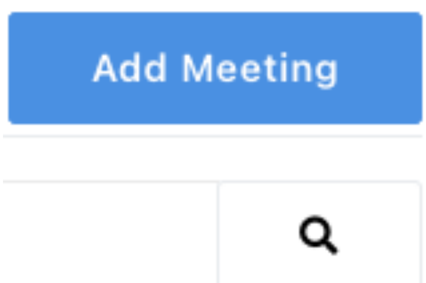
Once you have entered your categories and default location – Click Save at the bottom of the page.

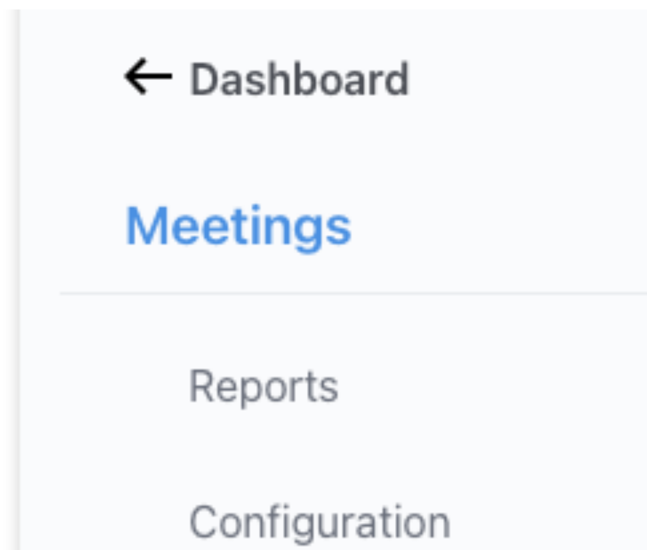
After your configuration is set, you are ready to enter your meetings.

Entering Meeting Information

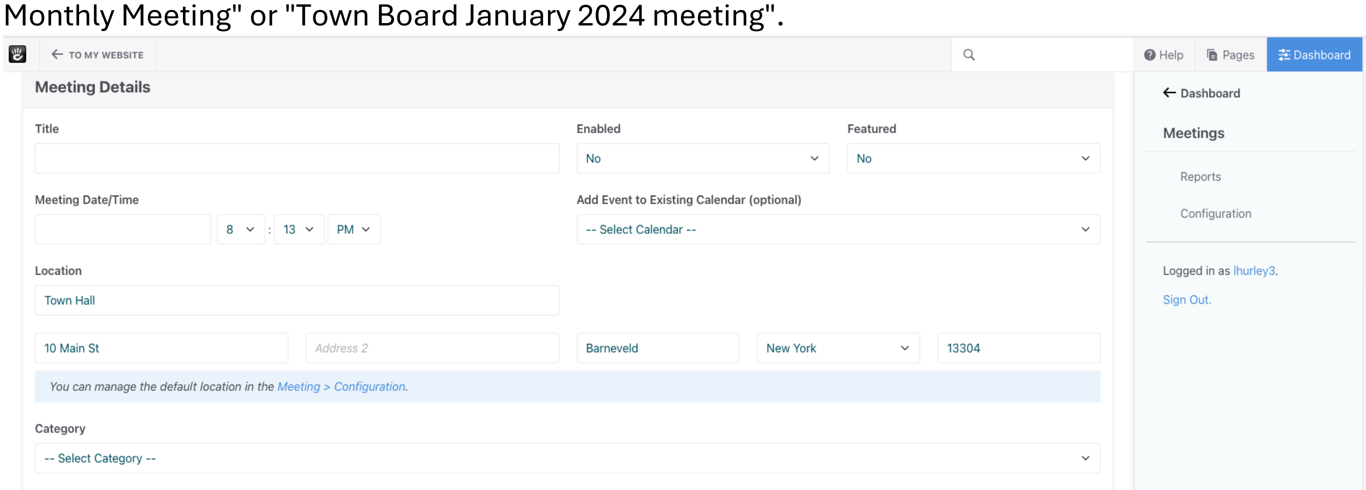
Meeting information is entered from the Dashboard. Here is a step-by-step guide:

- From the 'Dashboard' click Meetings
- Select 'Add Meeting'.
- Fill out the meeting details, including the date, time and agenda items. The default meeting location will already be populated.
- Use the dropdown menu to assign a category to your meeting.
- Set "Enable" option to "No" to prevent the meeting information from being displayed on the live webpage.
- Set the "Enable" option to "Yes" when you are ready to have the meeting information displayed on the live webpage.
- Click 'Save' to record the meeting.
- After the meeting has taken place return to post the meeting minutes
- Click 'Save" to post the update meeting information to the public webpage.





Title: Provide a descriptive name for the meeting. For example, "Town Board Regular Monthly Meeting" or "Town Board January 2024 meeting".



Enabled Select "Yes" or "No" from the drop-down menu. The meeting information will not appear on the live website until "Yes" is selected. Use "No" if you are not ready to make the meeting details public.

Featured: Select "Yes" or "No" from the drop-down menu. This option relates to using the Calendar to display events more prominently.

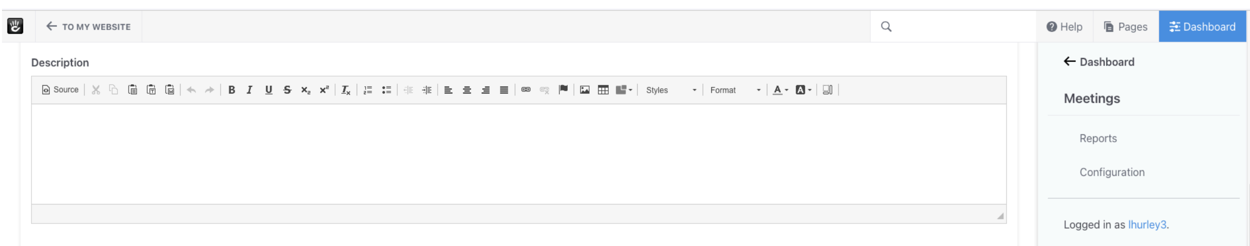
Meeting Date/Time: Select the date of the meeting from the calendar. Set the time using the drop-down menu.

Add Events to Existing Calendar (optional). This option allows you to add the meeting to a selected calendar. You must have a calendar set up. Meetings can also be added to a calendar from the Calendar Events section in the dashboard.

Location: This field is prepopulated from the Configuration but can be overridden for any individual meeting.

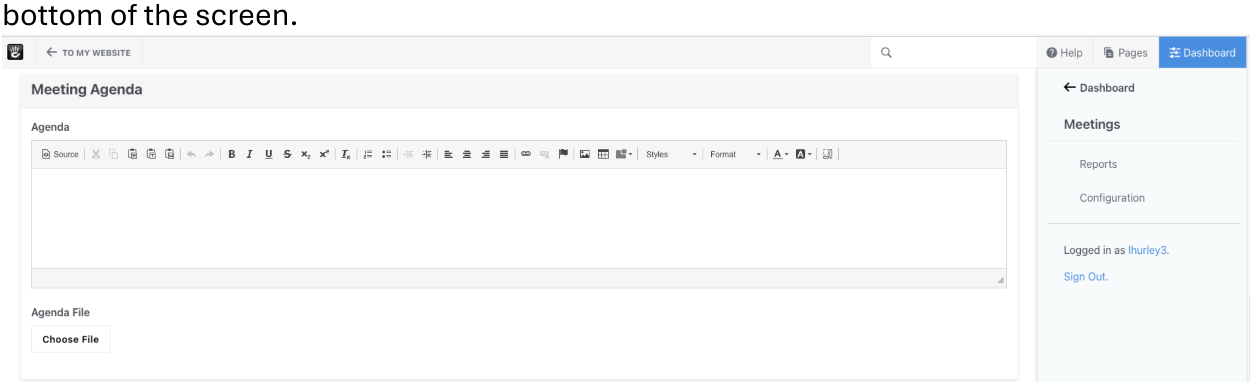
Category: Select the appropriate category from the drop-down menu.

Description: (Optional). Provide a description of what the meeting is about.

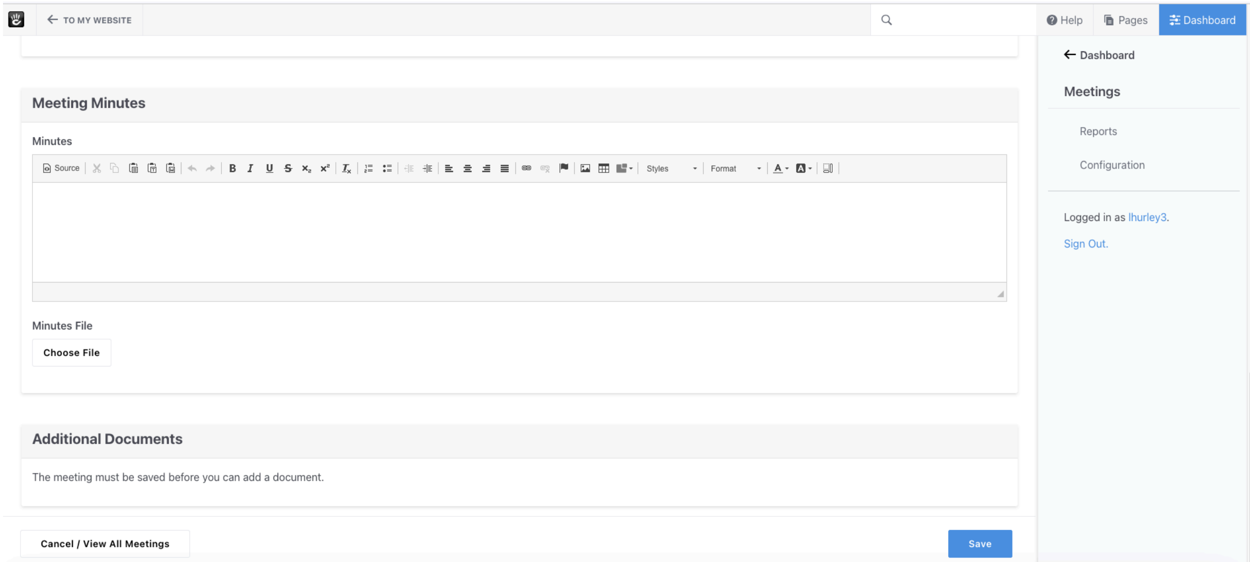


Agenda: The agenda can be typed into the dialog box or attached as a file (PDF). If neither is provided, the public view will default to "Agenda Pending".

You are done entering information until after the meeting takes place, click "SAVE" at the bottom of the screen.



Meeting Minutes: After the meeting takes place, add the minutes by either entering them into the dialog box or attaching a file (PDF). Until this step is completed, the public view will indicate "Minutes Pending".



Additional Documents: This option allows you to add more documents relevant to the meeting, such as resolutions.

Understanding the "Enable" Setting

The "Enable" setting controls the visibility of meeting information. Here's how it works:

Enable: Yes

When the "Enable" setting is set to "Yes," the meeting information will be visible to anyone who visits the live webpage.

Enable: No

Setting "Enable" option to "No" will hide the meeting information from the live webpage. This allows you to prepare meeting information ahead and control when it is displayed to the public.