

CIVICCLERK^{CP} UPLOADING AN AGENDA

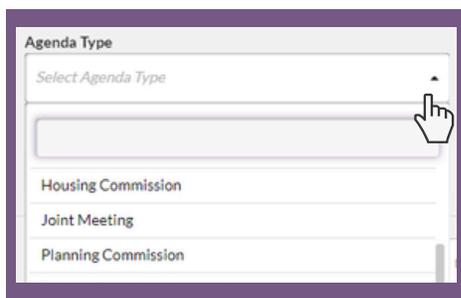
- 1- Sign in through the website sign in (waffle) or through the CivicPlus Platform.
- 2- Select the **Meetings** tab.



- 3- Click on **+NEW AGENDA**

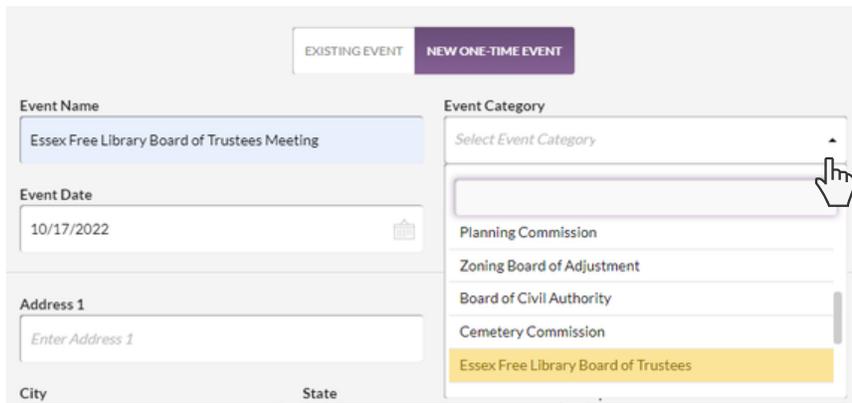


- 4- Enter the Board/Committee name as the **Agenda Name** (see the TIP below). Be consistent in your titles each time to aid in future searches.
- 5- Select your committee as the **Agenda Type**.



- 6- Skip Cut-Off Date and Cut-Off Time.
- 7- Select **EXISTING EVENT** if events have been created ahead for the upcoming year. Otherwise, select **NEW ONE-TIME EVENT**.
- 8- Enter the Event Name (DO NOT LEAVE IT AS "ONE TIME EVENT". Be Consistent in your titles each time to aid in future searches. (i.e. Cemetery Commission Meeting). Use the word, "Meeting" - this is how it will appear on the website calendar.

9- **Event Category** - Select the correct board/committee from the drop down menu. This is how your meeting will be searched on the website. This should be the same for all meetings of this type.

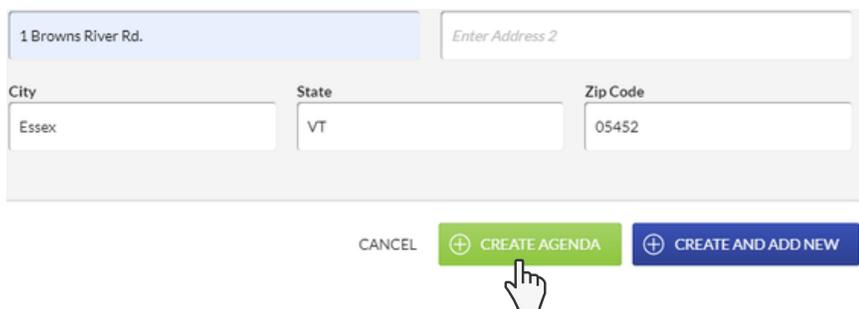


The screenshot shows a form for creating a new one-time event. At the top, there are two tabs: "EXISTING EVENT" and "NEW ONE-TIME EVENT". The "NEW ONE-TIME EVENT" tab is selected. The form has several fields: "Event Name" (filled with "Essex Free Library Board of Trustees Meeting"), "Event Date" (filled with "10/17/2022"), "Address 1" (placeholder "Enter Address 1"), "City", and "State". On the right side, there is an "Event Category" dropdown menu. The dropdown is open, showing a list of categories: "Select Event Category", "Planning Commission", "Zoning Board of Adjustment", "Board of Civil Authority", "Cemetery Commission", and "Essex Free Library Board of Trustees" (which is highlighted in yellow). A hand cursor is pointing at the dropdown arrow.

10- Select the date of the meeting and the time.

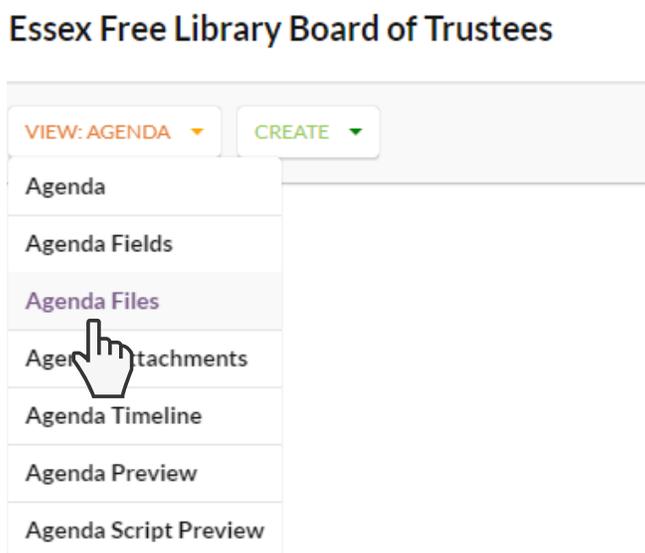
11- Enter the location of the meeting.

12- Select **+CREATE AGENDA**.



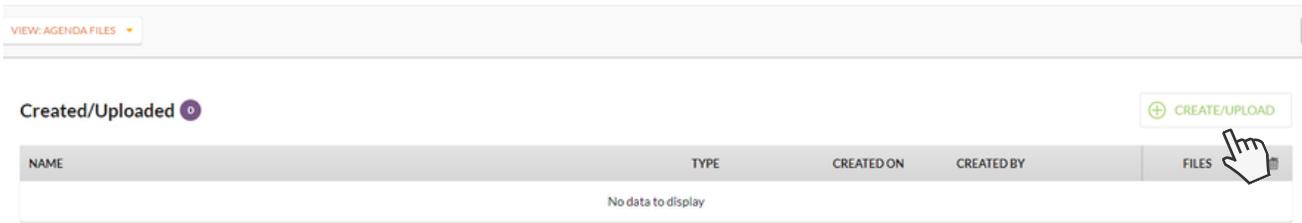
The screenshot shows the address and location fields of the form. "Address 1" is filled with "1 Browns River Rd." and "Address 2" has the placeholder "Enter Address 2". Below these are fields for "City" (filled with "Essex"), "State" (filled with "VT"), and "Zip Code" (filled with "05452"). At the bottom of the form, there are three buttons: "CANCEL", "+ CREATE AGENDA" (highlighted in green with a hand cursor pointing to it), and "+ CREATE AND ADD NEW" (in blue).

13- Select Agenda Files from the drop down menu, **VIEW: AGENDA:**



The screenshot shows the "VIEW: AGENDA" dropdown menu. The menu is open, showing a list of options: "Agenda", "Agenda Fields", "Agenda Files" (highlighted in purple with a hand cursor pointing to it), "Agenda Attachments", "Agenda Timeline", "Agenda Preview", and "Agenda Script Preview". The "CREATE" button is visible to the right of the dropdown.

14- Click on +CREATE/UPLOAD



15- Click on the UPLOAD tab.

16 - Enter the File Name.

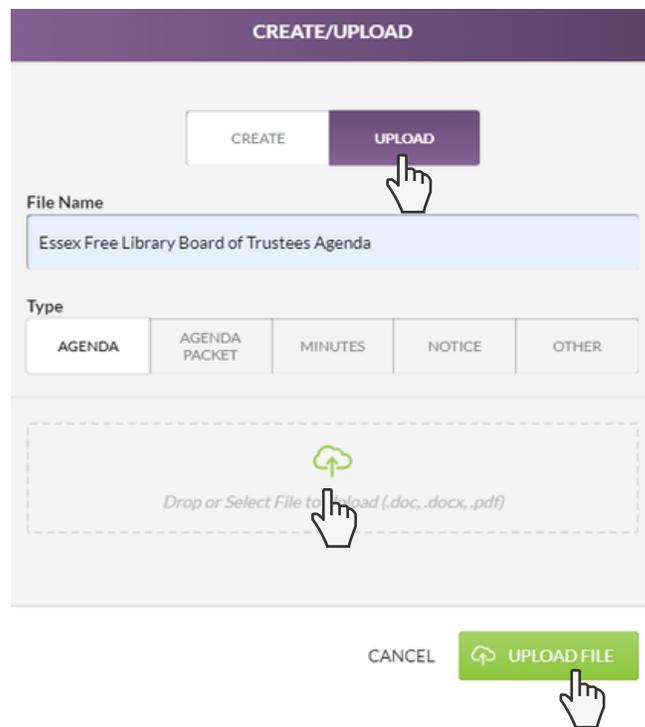
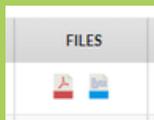
17- Select Type: AGENDA.

18- Drag and drop your agenda file or click on the green upload cloud/arrow to find it in your Explorer files.

19- Click on UPLOAD FILE.



You can add a file in Microsoft Word format and CivicClerk will upload and convert to a PDF for you.



20- Click on the orange PUBLISH button.



21- Be sure you are in the **PUBLIC PORTAL**.

22- Select the file you created from the drop down menu under **Agenda to Publish**.

The screenshot shows the 'PUBLISH' form. The 'Publish to' section has two buttons: 'PUBLIC PORTAL' (highlighted in green) and 'BOARD PORTAL'. The 'Agenda to Publish' section has a dropdown menu with 'Select Agenda' and a list of items. The first item, 'Essex Free Library Board of Trustees Agenda', is highlighted in yellow. There are also 'NOT PUBLISHED' and 'PUBLISHED' buttons and a 'Publish on Date' icon.

23- Click on the **PUBLISHED** tab.

24- Select YES to Send Email Notifications. This will send to those who subscribe.

25- Click on **+PUBLISH**.

The screenshot shows the 'PUBLISH' form. The 'Send Email Notifications' section has two buttons: 'YES' and 'NO' (highlighted in red). The 'Packet to Publish' section has a dropdown menu with 'Select Agenda Packet' and a list of items. The first item, 'Essex Free Library Board of Trus...', is highlighted in green. There are also 'NOT PUBLISHED' and 'PUBLISHED' buttons and a 'Publish on Date' icon. At the bottom, there are 'CANCEL' and '+ PUBLISH' buttons.

26- **Don't skip this step!** Check your work every time by visiting the HOME page of the website at www.essexvt.org. Scroll to the calendar and find your event. Click on it and test out the links.

CIVICCLERK[®] CREATING A COMMITTEE AGENDA

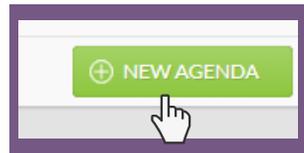
1- Sign in through the website sign in (waffle) or through the CivicPlus Platform.



2- Select the **Meetings** tab.



3- Click on the green **NEW AGENDA** tab in the upper right corner.



4- Enter the Agenda Name (i.e., Cemetery Commission).

5- Select the Agenda Type from the dropdown menu.

6- Disregard Cut-Off Date and Cut-Off Time. You do not need to use these.

7- Find an existing event if you have meetings already set on the calendar and skip to step 12 or create a New One-time Event.

8- Enter the Event Name (DO NOT LEAVE IT AS “ONE TIME EVENT”. This is what shows up on the website calendar. It should identify what is happening. You would enter your committee name and the word, “Meeting”, or “Special Meeting” (i.e., Cemetery Commission Meeting”).

9- Select the Event Category from the drop down menu.

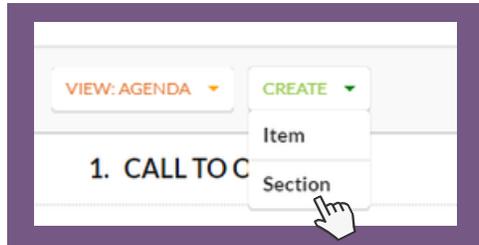
10- Disregard the Notice field.

11- Select the date of the meeting and time for the Event Date and Event Time and enter the address for the meeting.

12- Click on **CREATE AGENDA**.

ADDING ITEMS OR SECTIONS TO THE AGENDA

Default **sections** will show up on your agenda such as, “CALL TO ORDER”, “BUSINESS ITEMS”, and “ADJOURN”. Default **items** will appear under sections, if you have any. This could include, “Approve minutes:” under the section “BUSINESS ITEMS”, for example.



To add a section:

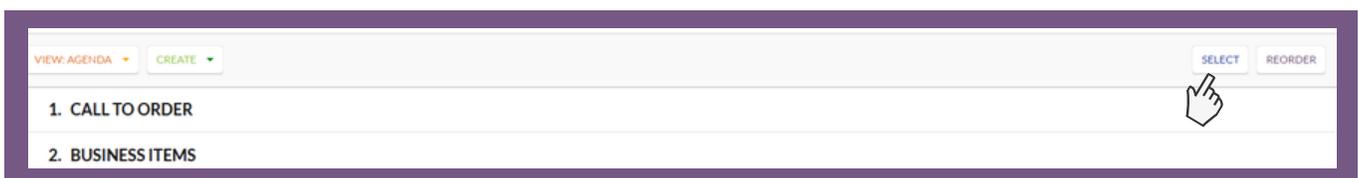
- 1- Select Section from the dropdown menu under **CREATE**. Type the name of the new section. Section Text is not necessary. Click on **CREATE SECTION** when finished. The new section will appear at the bottom.
- 2- If desired, click on the **REORDER** button on the upper right corner to drag and drop the section into a different place and save.

To add an item:

- 1- Select Item from the dropdown menu under **CREATE**.
- 2- Select the section from the dropdown menu that your item should fall under.
- 3- Agenda Item Name - type in the name of your item. Examples are, "Consider approval of xx", "Presentation of xx", "Consider authorization of xx".
- 4- Select Item Category (likely the same as the section, or choose the closest related category to what you are adding). This is used to filter searches later.
- 5- Department - choose your department.
- 6- Skip Item ID. The entry autogenerated an item code.
- 7- If there is a document related to this item, you can drag and drop it here or click in the Attachment Upload to browse for it. Select “Non-Confidential” and YES to Show Link on Public Portal. You can change the name of your attachment or keep it the same. Repeat for more than one document.
- 8- Click on **CREATE ITEM** or **CREATE AND ADD NEW** if adding more items.

DELETING ITEMS OR SECTIONS ON THE AGENDA

- 1- When viewing the agenda (you should see all sections and items listed), click on the **SELECT** button in the upper right corner.



2- Check the box next to the items or sections you want to delete and click on the DELETE button in the upper right corner.



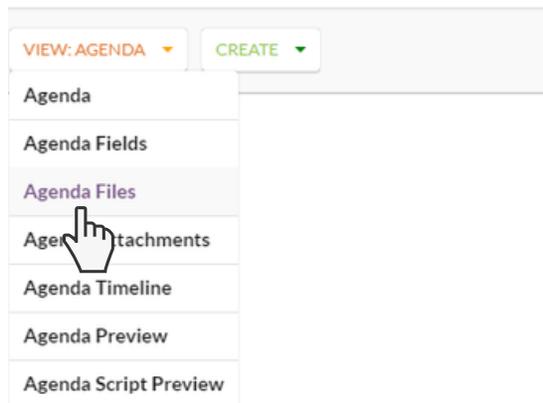
TIPS:

- Review your documents before uploading. Be sure to redact information that does not need to be in a public document, such as personal emails, phone numbers, and addresses. If it is not pertinent to the information you are sharing, it should be redacted to protect the privacy of others.
- You can upload Word and Excel documents and CivicClerk will automatically convert them to PDFs for the packet. This saves time!
- If you create PDFs on your own, create them by converting files instead of scanning them, when possible. This creates a smaller file that is easier to upload.

CREATE THE PDF

1- Select Agenda Files from the drop down menu, **VIEW: AGENDA:**

Essex Free Library Board of Trustees



2- Click on **+CREATE/UPLOAD**



3- Click on the **CREATE** tab at the top of the box that pops up.

4 - Select **File to Create: AGENDA**.

5- Type in the name (i.e., Cemetery Commission Agenda 10-30-2024)

6- Click on **CREATE FILE**. You can now click on the Adobe icon on the right to download the Agenda pdf for printing and emailing.

7- Repeat steps 2 through 6 to create an Agenda Packet if you have uploaded documents to the items you have on the agenda. Do this by selecting **AGENDA PACKET** in step 4.

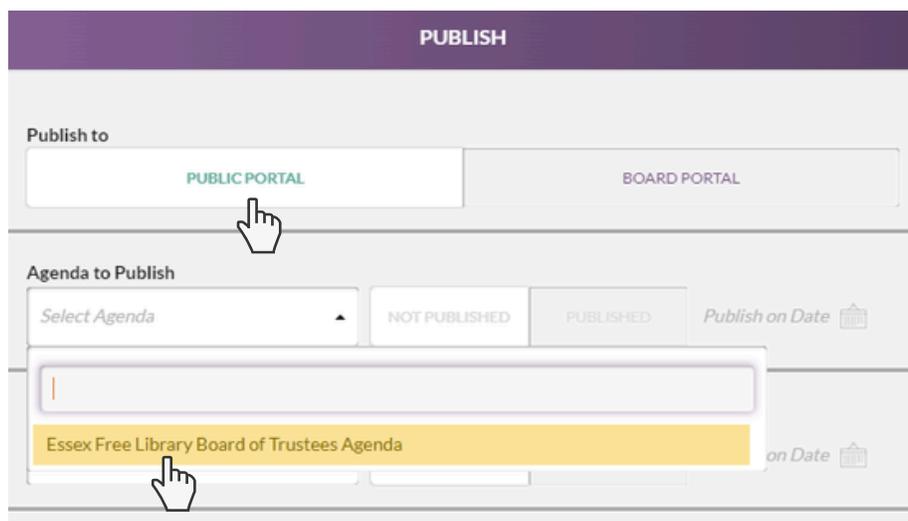
PUBLISH THE AGENDA & PACKET

1- Click on the orange **PUBLISH** button.



2- Be sure you are in the **PUBLIC PORTAL**.

3- Select the file you created from the drop down menu under **Agenda to Publish**.



- 4- Click on the **PUBLISHED** tab under Agenda to Publish.
- 5- Select YES to Send Email Notifications. This will send to those who subscribe to receive an email when an agenda is posted. Skip to step 8 if you did not create a packet file.
- 6- Select the file you created from the dropdown menu under **Packet to Publish** if you created a packet file. 1
- 7- Click on the **PUBLISHED** tab under Packet to Publish.
Select NO to Send Email Notifications. You do not need to send the packet to subscribers.
- 8- Click on **+PUBLISH** at the bottom. Both files will publish to the public portal.

The screenshot shows a 'PUBLISH' form with the following sections:

- Publish to:** Radio buttons for 'PUBLIC PORTAL' (selected) and 'BOARD PORTAL'.
- Agenda to Publish:** A dropdown menu showing 'Essex Free Library Board of Trus...' with a red 'X' icon. To its right are buttons for 'NOT PUBLISHED', 'PUBLISHED' (highlighted in green with a hand cursor), and 'Publish on Date' with a calendar icon.
- Send Email Notifications:** Radio buttons for 'YES' (with a hand cursor) and 'NO'.
- Packet to Publish:** A dropdown menu labeled 'Select Agenda Packet'. To its right are buttons for 'NOT PUBLISHED', 'PUBLISHED', and 'Publish on Date' with a calendar icon.
- Minutes to Publish:** A dropdown menu labeled 'Select Minutes'. To its right are buttons for 'NOT PUBLISHED', 'PUBLISHED', and 'Publish on Date' with a calendar icon.
- Notice to Publish:** A dropdown menu labeled 'Select Notice'. To its right are buttons for 'NOT PUBLISHED', 'PUBLISHED', and 'Publish on Date' with a calendar icon.
- Other to Publish:** A dropdown menu labeled 'Select Other'. To its right are buttons for 'NOT PUBLISHED', 'PUBLISHED', and 'Publish on Date' with a calendar icon.

At the bottom right of the form, there are two buttons: 'CANCEL' and '+ PUBLISH' (highlighted in green with a hand cursor).

9- **Don't skip this step!** Check your work every time by visiting the HOME page of the website at www.essexvt.org. Scroll to the calendar and find your event. Click on it and test out the links.