CIVICCLERK UPLOADING AN AGENDA
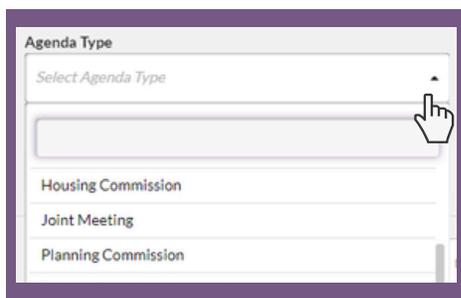
1- Sign in through the website sign in (waffle) or through the CivicPlus Platform.

2- Select the Meetings tab.

3- Click on +NEW AGENDA
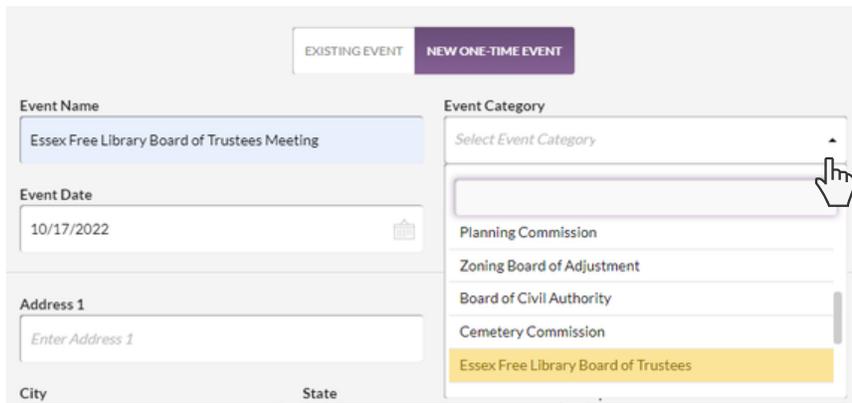

4- Enter the Board/Committee name as the Agenda Name (see the TIP below). Be consistent in your titles each time to aid in future searches.

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.
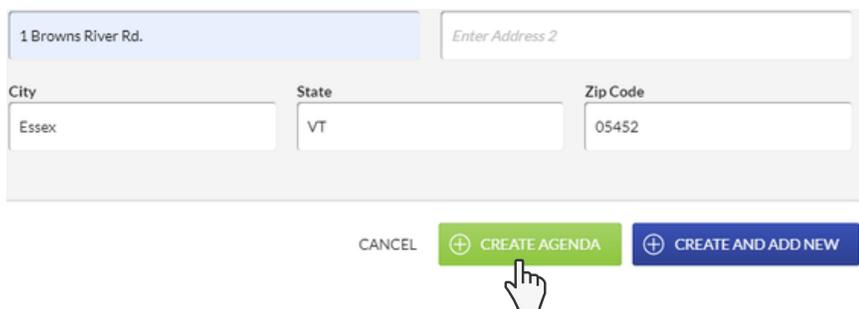

10- Select the date of the meeting and the time.
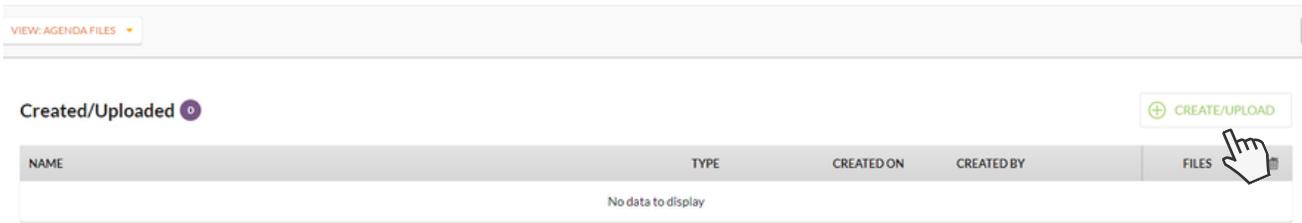11- Enter the location of the meeting.
12- Select +CREATE AGENDA.

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

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.
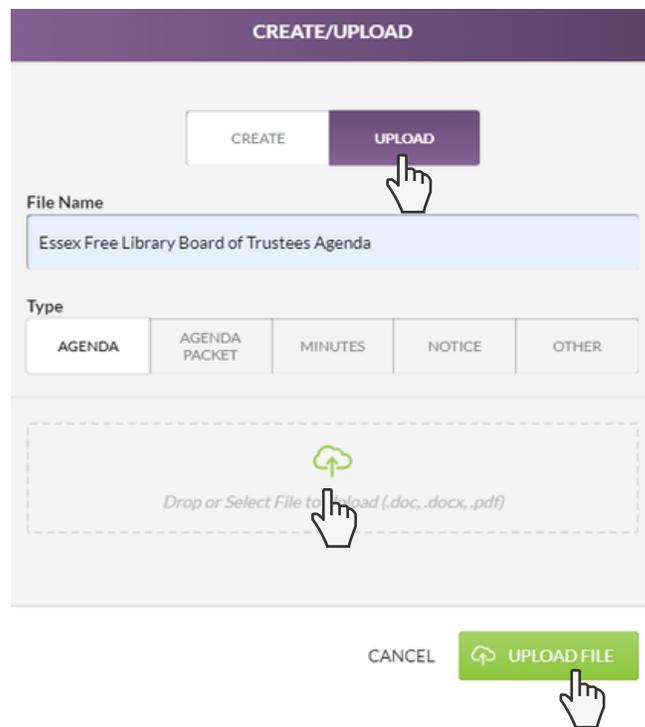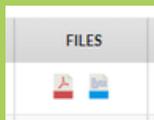
20- Click on the orange PUBLISH button.

21- Be sure you are in the PUBLIC PORTAL.

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

23- Click on the PUBLISHED tab.

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

25- Click on +PUBLISH.

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 CP 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.
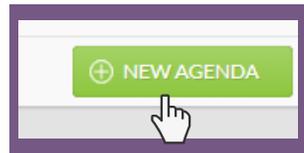
4- Enter the Agenda Name (i.e., Cemetery Commission).
5- Select the Agenda Type from the dropdown menu.
6- Disregard Cut-Off Date and Cut-Off Time. You do not need to use these.
7- Find an existing event if you have meetings already set on the calendar and skip to step 12 or create a New One-time Event.
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.
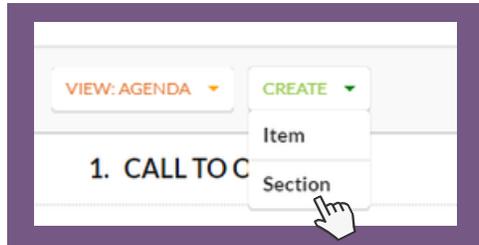

To add a section:

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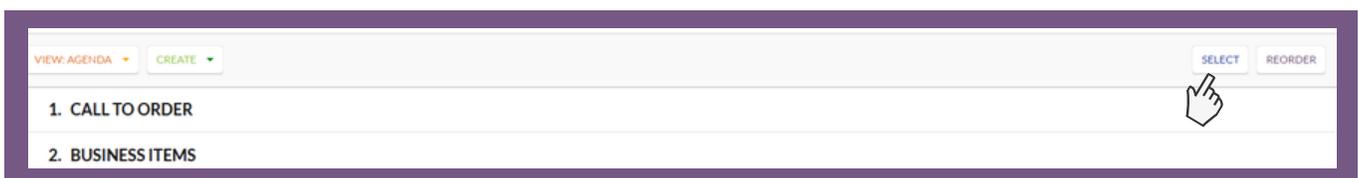
2- Check the box next to the items or sections you want to delete and click on the DELETE button in the upper right corner.
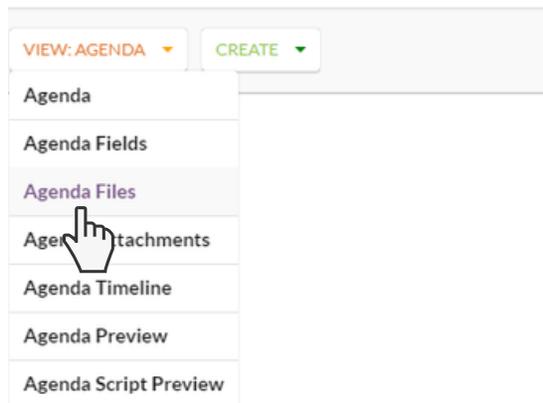
TIPS:

- 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

VIEW: AGENDA ▾   CREATE ▾

Agenda

Agenda Fields

Agenda Files

Age... tachments

Agenda Timeline

Agenda Preview

Agenda Script Preview

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.

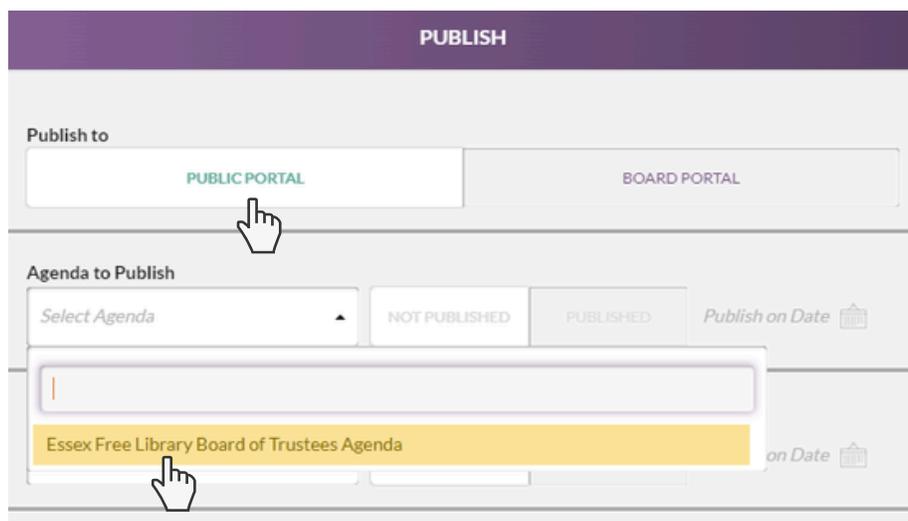## PUBLISH THE AGENDA & PACKET

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.

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.