# Essex

## VERMONT
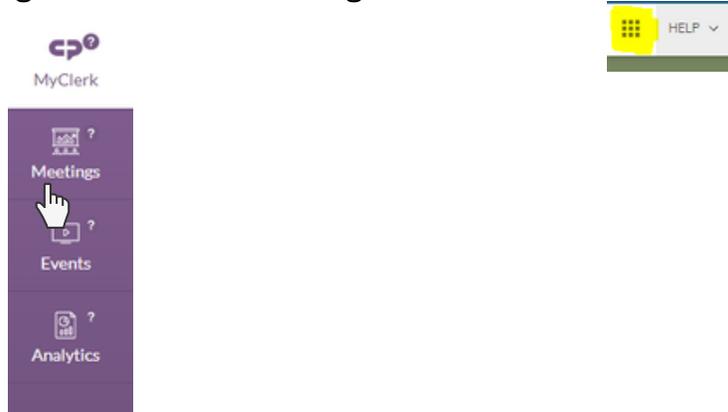
HANDBOOK FOR
BOARD, COMMITTEE & COMMISSION MEMBERS

ATTACHMENT D
CivicClerk Instruction to Post Minutes

# CIVICCLERK UPLOADING MINUTES (DRAFT & FINAL)

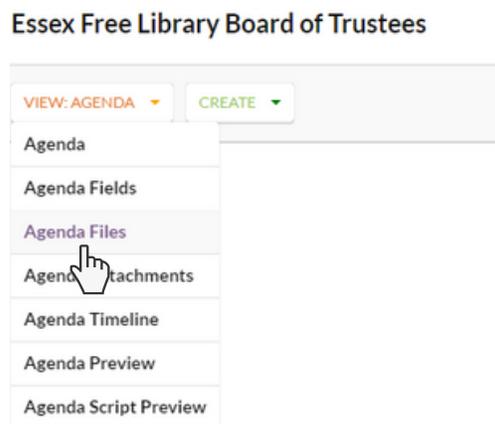1- Sign in through the website sign in (waffle) or through the CivicPlus Platform.
2- Select the Meetings tab.

3- Select your meeting you created when you posted the agenda. Use either the CARD VIEW or LIST VIEW and the filter settings at the top to narrow down your search.
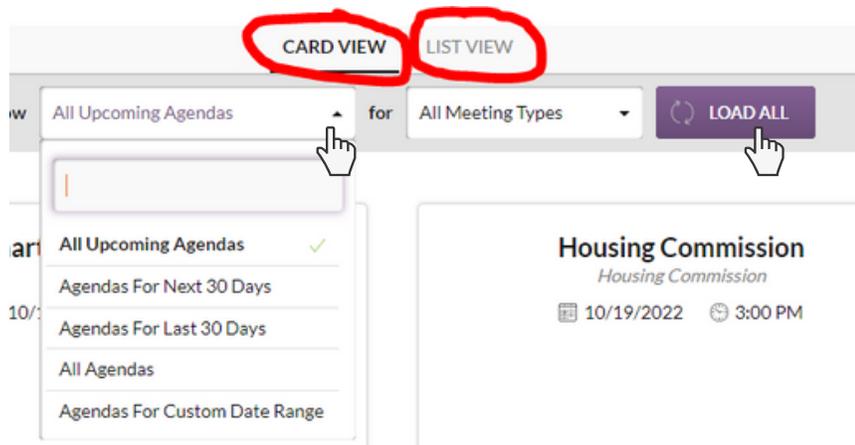
4- Select Agenda Files from the drop down menu, VIEW: AGENDA:

5- Click on  +CREATE/UPLOAD

Created/Uploaded 1                                                    ⊕ CREATE/UPLOAD

| NAME | TYPE | CREATED ON | CREATED BY | | |
|---|---|---|---|---|---|
| Cemetery Commission Agenda | Agenda | 9/28/2022 | Shannon Lunderville | 📄 | 🗑 |

6- Click on the UPLOAD tab.

7 - Enter the File Name.

8- Select Type: MINUTES.

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

10- Click on UPLOAD FILE.  You should now have two files - an agenda file and a minutes file. (DO NOT delete the agenda file.)

💡

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

FILES

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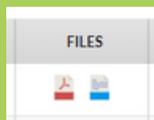
**CREATE/UPLOAD**

| CREATE | UPLOAD |
|---|---|

File Name

20220928 Cemetery Minutes DRAFT

Type

| AGENDA | AGENDA PACKET | MINUTES | NOTICE | OTHER |
|---|---|---|---|---|

☁

*Drop or Select File to upload (.doc, .docx, .pdf)*

CANCEL    ☁ UPLOAD FILE

11- Click on the orange PUBLISH button.

Published 1                                                          📣 PUBLISH

| NAME | TYPE | PORTAL | PUBLISH DATE | PUBLISHED BY |
|---|---|---|---|---|
| Cemetery Commission Agenda | Agenda | Published to Public | 9/28/2022 | Shannon Lunderville |

12- Be sure you are in the PUBLIC PORTAL.

13- Select the file you created from the drop down menu under Minutes to Publish.

14- Click on the PUBLISHED tab.

15- Select NO to Send Email Notifications.

16- Click on +PUBLISH.



17- **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 "Agendas & Minutes" button and find your meeting. Click on the "minutes" link to be sure it works.

*FINAL MINUTES: If your board/committee posts draft minutes, with final versions at a later time, follow these steps to replace your draft copy with the final copy:*

1- Repeat Steps 1 through 10 to upload the final minutes. You should now see the agenda file, the draft minutes file, and the final minutes file. You may delete the draft version of the minutes by clicking on the red trash can, or keep it in CivicClerk. It does not have to be deleted. DO NOT delete the agenda file.

2- Repeat Step 11 and 12 to publish the new file.
3- Click on the RED X next to the draft file under Minutes to Publish.

Minutes to Publish

20220928 Cemetery Minutes D... ✕
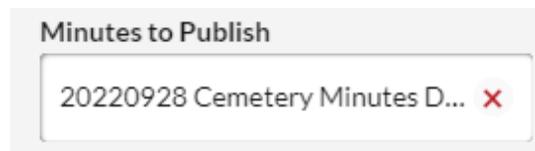
4- Select the new file (final version) from the drop down menu under Minutes to Publish.
5-Click on the PUBLISHED  tab.
6- Select NO to Send Email Notifications.
7- Click on +PUBLISH. The draft file has now been replaced with the new final file.
8 - **Don't skip this step!** Check your work every time by visiting the HOME page of the website at www.essexvt.org. Scroll to the "Agendas & Minutes" button and find your meeting. Click on the "minutes" link to be sure it works.