

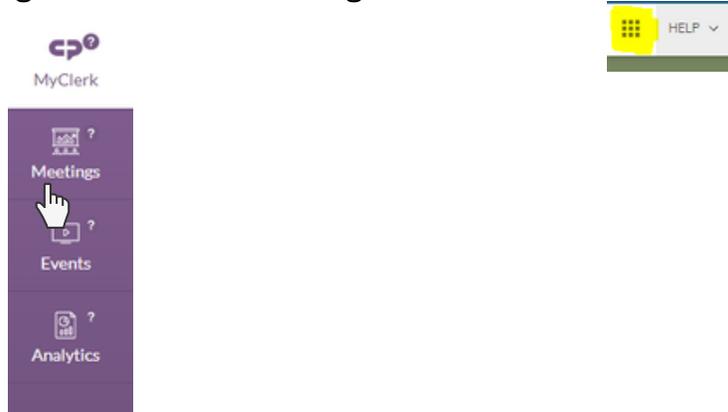


HANDBOOK FOR  
BOARD, COMMITTEE & COMMISSION MEMBERS

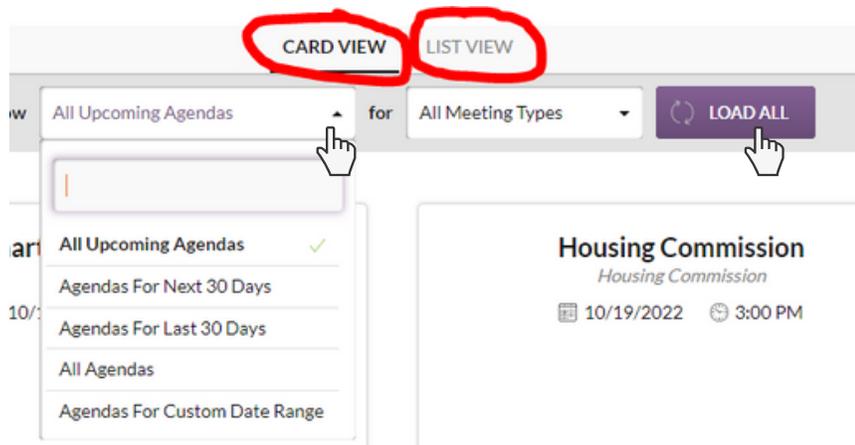
ATTACHMENT D  
CivicClerk Instruction to Post Minutes

# CIVICCLERK<sup>CP</sup> UPLOADING MINUTES (DRAFT & FINAL)

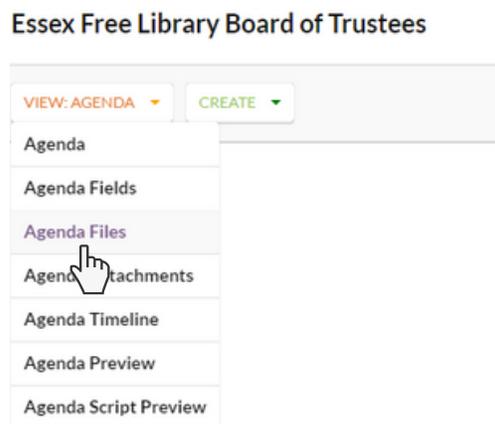
- 1- Sign in through the website sign in (waffle) or through the CivicPlus Platform.
- 2- Select the **Meetings** tab.



- 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	FILES
Cemetery Commission Agenda	Agenda	9/28/2022	Shannon Lunderville	

6- Click on the **UPLOAD** tab.

7 - Enter the File Name.

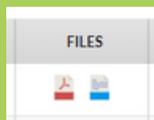
8- Select **Type: MINUTES**.

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.*



**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**.

The screenshot shows a 'PUBLISH' form with several sections:

- Publish to:** A dropdown menu with 'PUBLIC PORTAL' selected and 'BOARD PORTAL' as an alternative.
- Agenda to Publish:** A dropdown menu with 'Cemetery Commission Agenda' selected. It has 'NOT PUBLISHED' and 'PUBLISHED' tabs, with 'PUBLISHED' being active. A 'Publish on Date' button is also present.
- Send Email Notifications:** Radio buttons for 'YES' and 'NO', with 'NO' selected.
- Packet to Publish:** A dropdown menu with 'Select Agenda Packet' selected. It has 'NOT PUBLISHED' and 'PUBLISHED' tabs, with 'PUBLISHED' being active. A 'Publish on Date' button is also present.
- Minutes to Publish:** A dropdown menu with '20220928 Cemetery Minutes D...' selected. It has 'NOT PUBLISHED' and 'PUBLISHED' tabs, with 'PUBLISHED' being active. A 'Publish on Date' button is also present.
- Send Email Notifications:** Radio buttons for 'YES' and 'NO', with 'NO' selected.
- Notice to Publish:** A dropdown menu with 'Select Notice' selected. It has 'NOT PUBLISHED' and 'PUBLISHED' tabs, with 'PUBLISHED' being active. A 'Publish on Date' button is also present.
- Other to Publish:** A dropdown menu with 'Select Other' selected. It has 'NOT PUBLISHED' and 'PUBLISHED' tabs, with 'PUBLISHED' being active. A 'Publish on Date' button is also present.

At the bottom right, there are two buttons: 'CANCEL' and '+ PUBLISH'. A hand cursor is pointing at the '+ PUBLISH' button.

17- **Don't skip this step!** Check your work every time by visiting the HOME page of the website at [www.essexvt.org](http://www.essexvt.org). Scroll to the "Agendas & Minutes" button and find your meeting. Click on the "minutes" link to be sure it works.

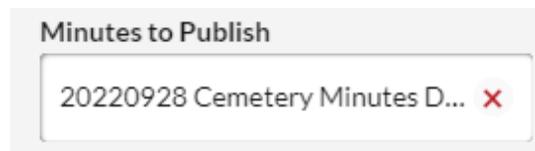
***FINAL MINUTES: If your board/committee posts draft minutes, with final versions at a later time, follow these steps to replace your draft copy with the final copy.***

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**.



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](http://www.essexvt.org). Scroll to the "Agendas & Minutes" button and find your meeting. Click on the "minutes" link to be sure it works.