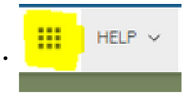
Essex
VERMONT

HANDBOOK FOR
BOARD, COMMITTEE & COMMISSION MEMBERS

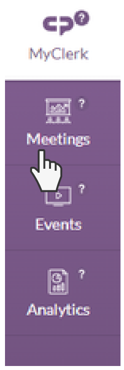
ATTACHMENT F
CivicClerk Instructions to Post to Selectboard Agenda

CIVICCLERK UPLOADING ITEMS TO A SELECTBOARD AGENDA

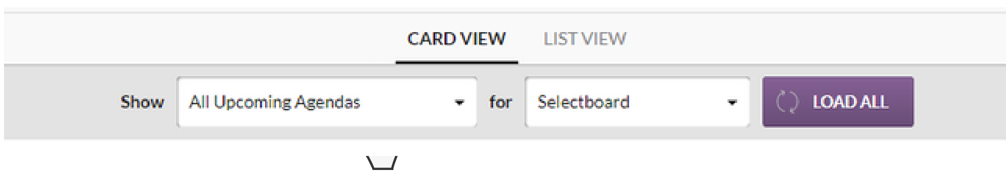
1- Sign in through the website sign in (waffle) or through the CivicPlus Platform.



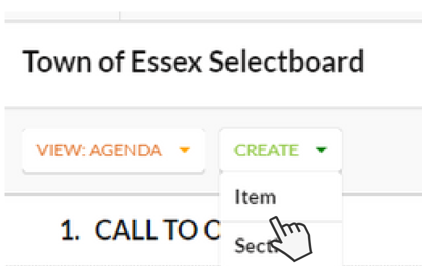
2- Select the Meetings tab.



3- Show All Upcoming Agendas for Selectboard.



4- Select the meeting you want.
5- Select to create an item from the CREATE dropdown menu.



6- Select a section (typically Business Items, Consent Items, or Reading File.)
7- Type in the name of your item. Examples are, "Consider approval of xx", "Presentation of xx", "Consider authorization of xx".
8- Select Item Category (likely the same as the section).
9- Department - choose your department.
10- Skip Item ID. The entry autogenerates an item code.
11- Click on CREATE ITEM or CREATE AND ADD NEW if adding more items.
12- There are two ways to upload your memorandum and packet files. You may create **USING THE MEMORANDUM TEMPLATE** or **UPLOADING YOUR OWN MEMORANDUM**.

USING THE MEMORANDUM TEMPLATE

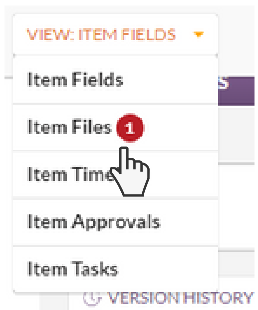
1- After completing the agenda item, you are taken to the memorandum template automatically. Scroll down through INFORMATION. This was automatically entered from your previous steps to enter the agenda item.

2- Under DETAILS, the Item Category and Department are auto-filled. Type in the "Issue", "To", and "Cc" fields.

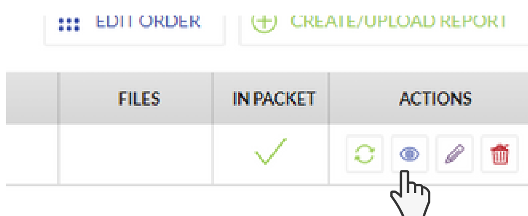
3- Under OTHER DETAILS, type in the "From", "Discussion", "Cost", and "Recommendation" fields. The Recommendation is usually worded like, "Staff recommends the Selectboard approve...".

4- Click on SAVE ITEM in the upper right corner.

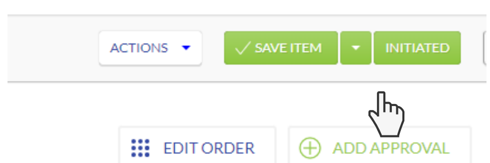
5- Select Item Files from the drop down menu called VIEW: ITEM FIELDS in the upper left corner.

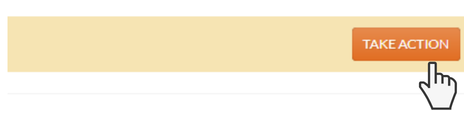


6 - You should see a Memorandum under Item Reports. This is the memorandum you just typed into the fields. Click on the eye icon under ACTIONS to see a preview of the memorandum.



7 - If you do not have any attachments, click on START APPROVALS to begin the work flow of approvals. If you are the Department Head, you may receive an email notification to approve. Or, you can just approve it from this screen by clicking on INITIATED and TAKE ACTION.

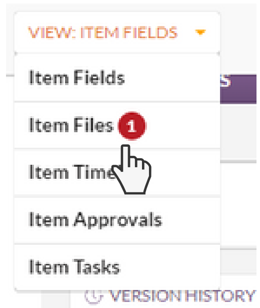




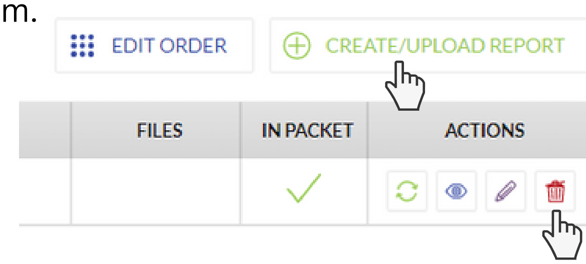
8- If you have attachments, skip to the ADDING ATTACHMENTS section of this instruction.

UPLOADING YOUR OWN MEMORANDUM

1- After completing the agenda item, you are taken to the memorandum template automatically. Since you have your own memorandum to upload, you can go directly into the files to do that. Select Item Files from the drop down menu called VIEW: ITEM FIELDS in the upper left corner.



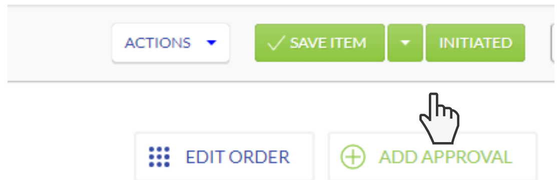
2 - You should see a Memorandum under Item Reports. This is the memorandum that automatically generates and you do not need. Click on the red trash can icon under ACTIONS to delete the memorandum.

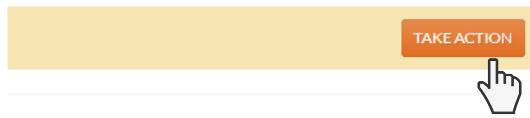


3 - Click on CREATE/UPLOAD REPORT found above the ACTIONS icons (see screenshot above).

4- Click on UPLOAD. Type the Item Report Name, which can be, "Memo". Drag or select your file from your computer and click UPLOAD FILE.

5- If you do not have any attachments, click on START APPROVALS to begin the work flow of approvals. If you are the Department Head, you may receive an email notification to approve. Or, you can just approve it from this screen by clicking on INITIATED and TAKE ACTION.

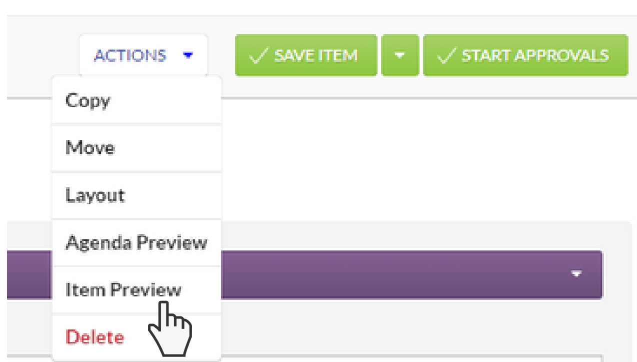




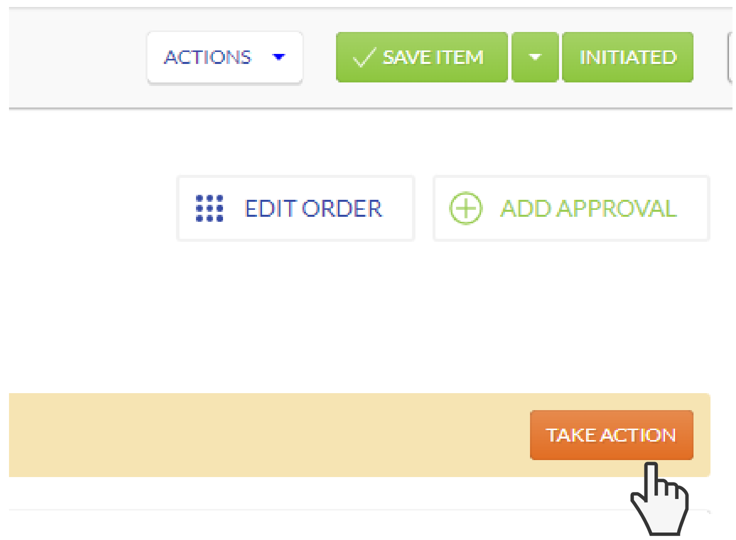
ADDING ATTACHMENTS

1- After creating or uploading your agenda, you should still be on the Item Files screen. If not, follow the steps from above to select Item Files from the drop down menu called VIEW: ITEM FIELDS in the upper left corner.
2- Click on ADD ATTACHMENTS.

3- Leave "Show Link on Public Portal" as YES.
4- Check the box "Non-Confidential" This means it is a public document and will go in the public packet. If you have a confidential document, click on "Selectboard Only". This is in special circumstances that would require the Selectboard to review and discuss in executive session.
5- Drag or select your file(s) from your computer. You may drag over or select more than one at a time. Click ADD ATTACHMENT when you have selected all of your files.
6- View your work by clicking on the ACTIONS dropdown menu in the upper right corner and selecting, ITEM PREVIEW.



7- Once you have your item memo and attachments ready, click on START APPROVALS to begin the work flow of approvals. If you are the Department Head, you may receive an email notification to approve. Or, you can just approve it from this screen by clicking on INITIATED and TAKE ACTION.



All items uploaded will go through a workflow for approvals:
Department Head > Deputy Manager > Manager

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.