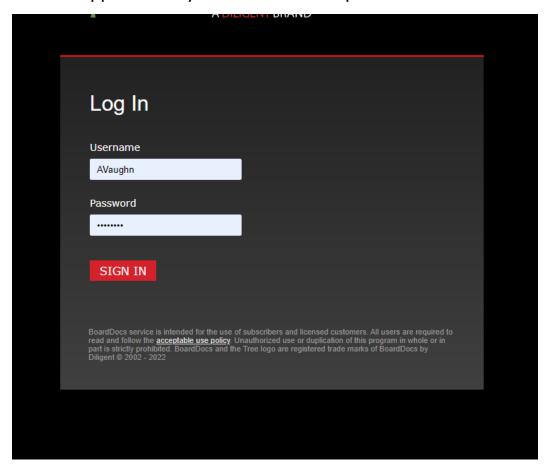
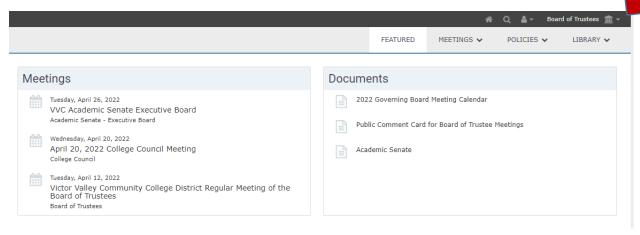
## **Steps to Create Agendas in Board Docs**

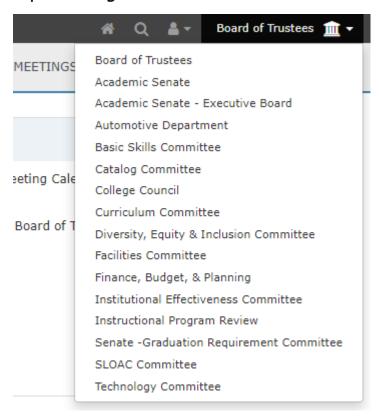
Go to <a href="https://boarddocs.com/">https://boarddocs.com/</a> and click Login in the top right hand corner. The screen below will appear. Add you username and password here.



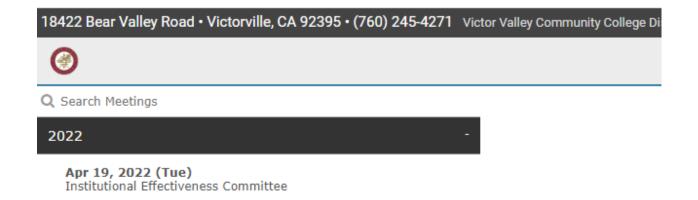
Once you are logged in you will see the screen below. Click on the arrow in the upper right hand corner to view the drop down menu.



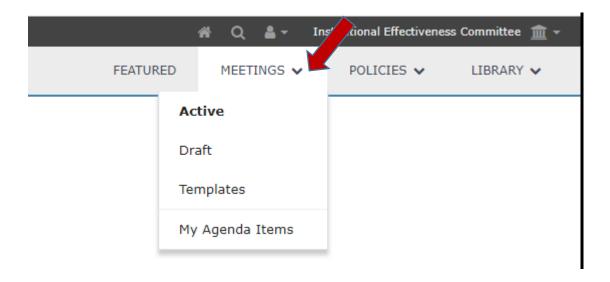
Once the drop down menu appears, select the name of the committee you are representing.



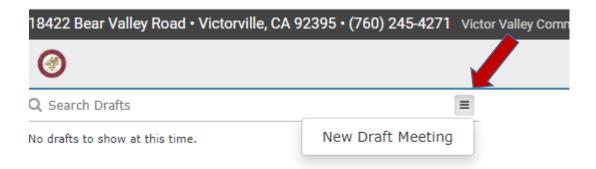
This is where your live agenda's will be displayed on the left side of the screen



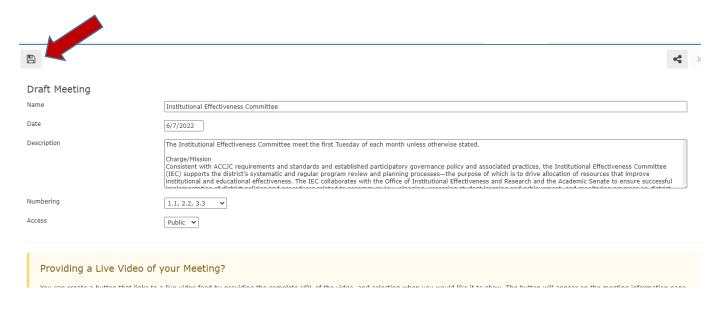
To create an agenda you will need to get into the draft area. On the right side of the screen click on the word "Meetings" and the drop down menu will appear. From there select "Draft"



Click on the menu option and then "New Draft Meeting"



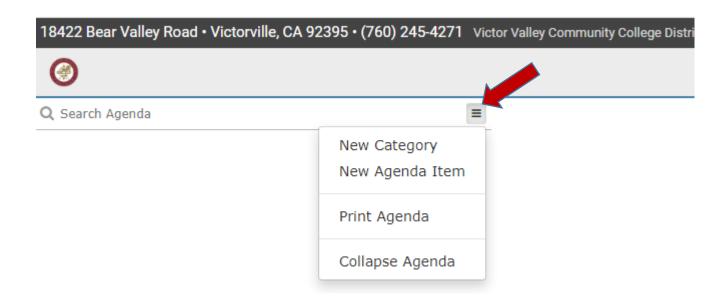
The committee info screen will pop up. Put the name of the committee, date of the meeting and in the description put the committee meeting schedule first then the committee charge. Then click "Save"



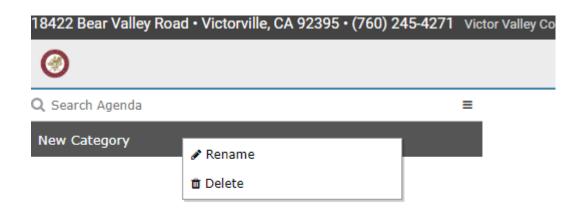
Once you save it click on the meeting date on the left and this screen will appear. Then click on "View the Agenda"



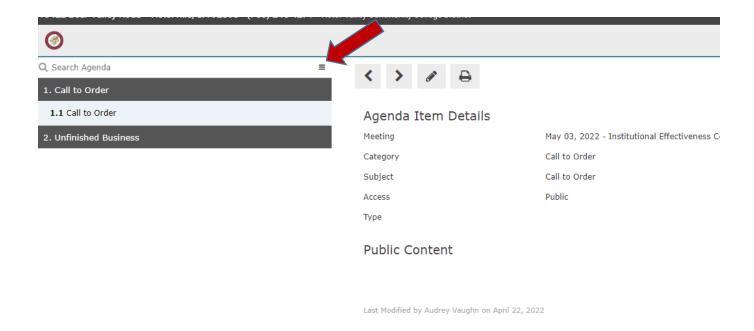
Once the agenda opens click on the 3 lines next to the search bar to get the menu to come up. Then click on "New Category"



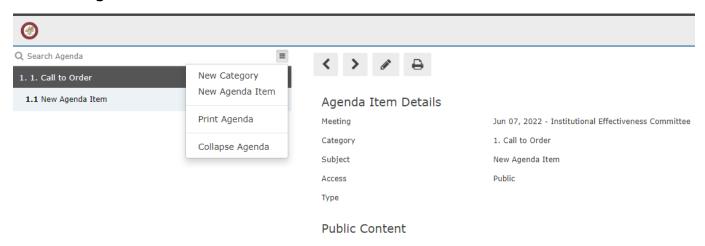
The title will be "New Category" so you will need to change it. Right click in the box and select "Rename" (example 1. Call to Order)



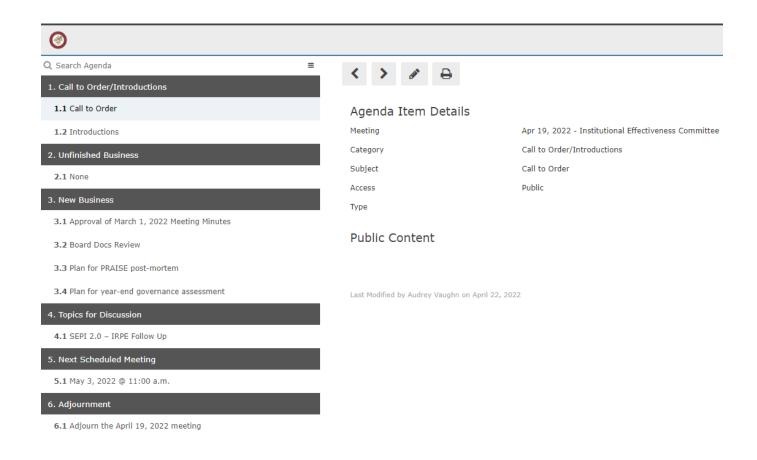
Once you get your first item named then you will go back to the 3 lines to get the menu to add the items under the category.



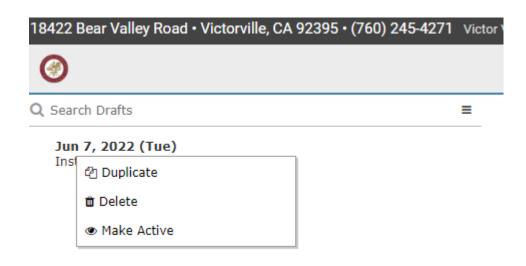
As you add new agenda items they will automatically show up under Item 1.1 New Agenda Item. You can pull them down into the category you need them and then change the titles



As you build your agenda it will look like this.

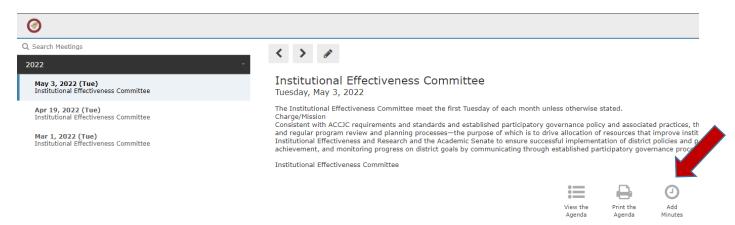


Once your agenda is complete you need to move it from draft to active. Right click on the agenda date and click "Make Active."

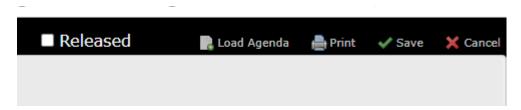


## **Steps to Create Minutes in Board Docs**

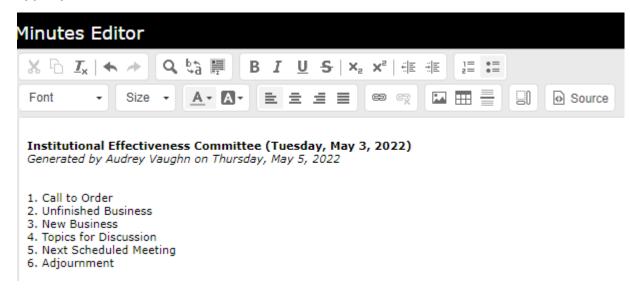
Go back into your active meetings and select the meeting date you wish to add minutes to. Click on "Add Minutes"



The blank minutes editor screen will open and in the top right hand corner you will have the option to "Load Agenda"



You can select this option and you will get the screen below that will allow you to type your minutes.



Or you can continue doing your minutes in the word format you normally use and then just paste it in the editor.

Once you finalize your minutes you will save them and then in order for them to show up as active you have to click on "Released"

