City of Broken Bow

Monday, June 25, 2012

City Council Regular Session

Description of new agenda layout and software

The City Administrator will provide a brief description of the new agenda management layout being used as part of the Beehive Agenda Management implementation.

Staff Contact: City Administrator

Agenda Management User Documentation

Beehive Industries

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Overview

Agenda Management is software for organizing the creation of meeting documents and automatically making them available to the public. Agenda Management makes it easy for multiple contributors to add components to a packet and to merge the components into a final document. Also, all of your Document information stays organized and in one place.

System Requirements

The Agenda Management software has the following minimum hardware and operating system requirements.

Operating System	Windows 7, Vista, XP (Windows XP Tablet PC and Media Center Editions are not supported)
Processor	1 GHz
RAM	512 MB
Disk space	2 GB

Staff Member

A Staff Member is a contributor who is responsible for creating and editing Agenda Items.

Main Window

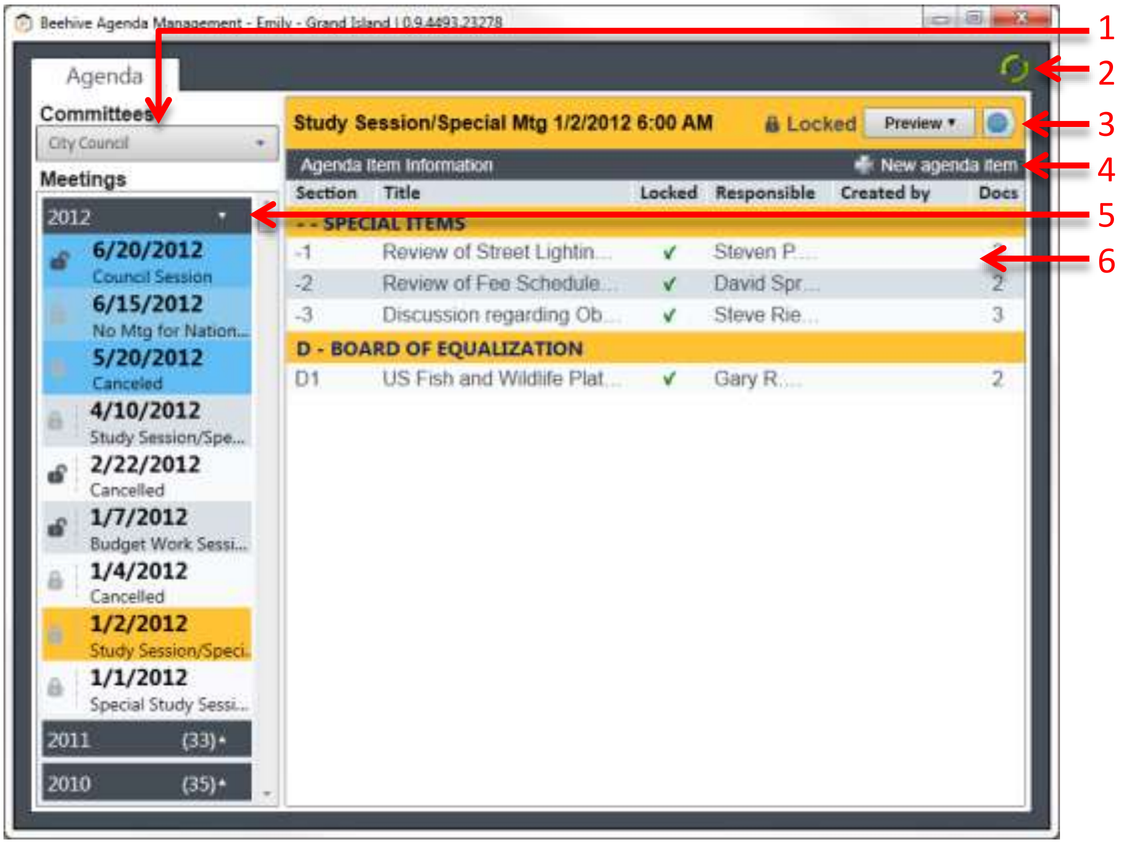

Figure 1

1. Committee Selection

The Committees drop-down contains the groups for which you can edit meeting agenda information. The contents of the Meetings list are based on the selection of the Committees drop-down.

2. Refreshing

The Refresh button allows the user to guarantee that the data they see is the latest on the server. If you don’t see changes a co-contributor has made, click the Refresh button to update your view.

3. Meeting Information

Figure 2

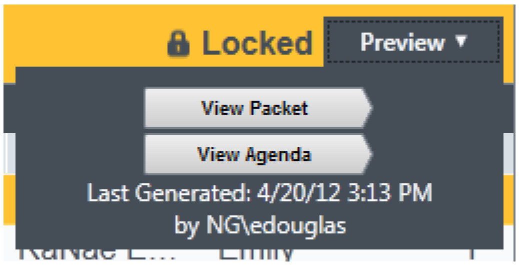

Figure 3

The header of the Agenda Item list (Figure 2) contains information about the meeting currently selected in the meeting list. The items are, from left to right:

- The type of meeting
- The meeting date and time
- The locked (ability to edit) status of the meeting
- The Preview button allowing Staff Members to view the meeting packet and agenda after an Admin generates them. The expanded view is shown in Figure 3.
- If the meeting has been published, a button to view the meeting on the public website

4. Adding a New Agenda Item

This button adds a new Agenda Item. Staff Members may only add items when the Meeting is unlocked. The information required for creating an Agenda Item will be discussed later in the Agenda Item Property Editor section.

5. Meetings List

The Meetings list shows all available meetings for the selected Committee. Each Meetings list item has three components, described below. Future meetings are highlighted in blue so they are easier to find while past meetings are grey since they will be changed less often. The currently selected Meeting is highlighted in gold. Meetings are grouped by year into collapsible sections allowing the user to only view the meetings important to them.

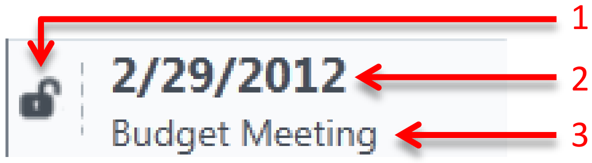

Figure 4

1. The lock icon indicates if the meeting can be edited. A dark, open lock means that the meeting may be edited whereas a gray, closed lock may not be edited.
2. This is the meeting's date. The meetings are sorted by this date.
3. This is the type of meeting as defined by an administrator.

6. Item List

Section	Title	Locked	Responsible	Created by	Docs
C - PRESENTATIONS AND PROCLAMATIONS					
C1	Recognition of the Nebr…	✓	RaNae E…		1
E - PUBLIC HEARINGS					
E1	Public Hearing on Amen…	✓	Doug Wal…		1
E2	Public Hearing on Amen…	✓	Chad Na…		2
E3	Public Hearing on Acqui…	✓	Gary Mader		0

Figure 5

The items in the list are grouped by Section (an administration-defined classification). Each of these groups corresponds to a gold sub-header that gives the abbreviation and name of the Section for the following items.

Each Agenda Item has its own row that displays basic information on the item. It shows, from left to right: the Section and index in the Section, the item's title, the lock (ability to edit) status, the person responsible for the item, who created the item, and the number of Documents (attachments) associated with the item.

Complete the following to edit an Agenda Item:

1. Click on the Agenda Item you want to edit. This will open the Agenda Item Property Editor.
2. Make desired changes and then you can save the Agenda Item.

Agenda Item Property Editor

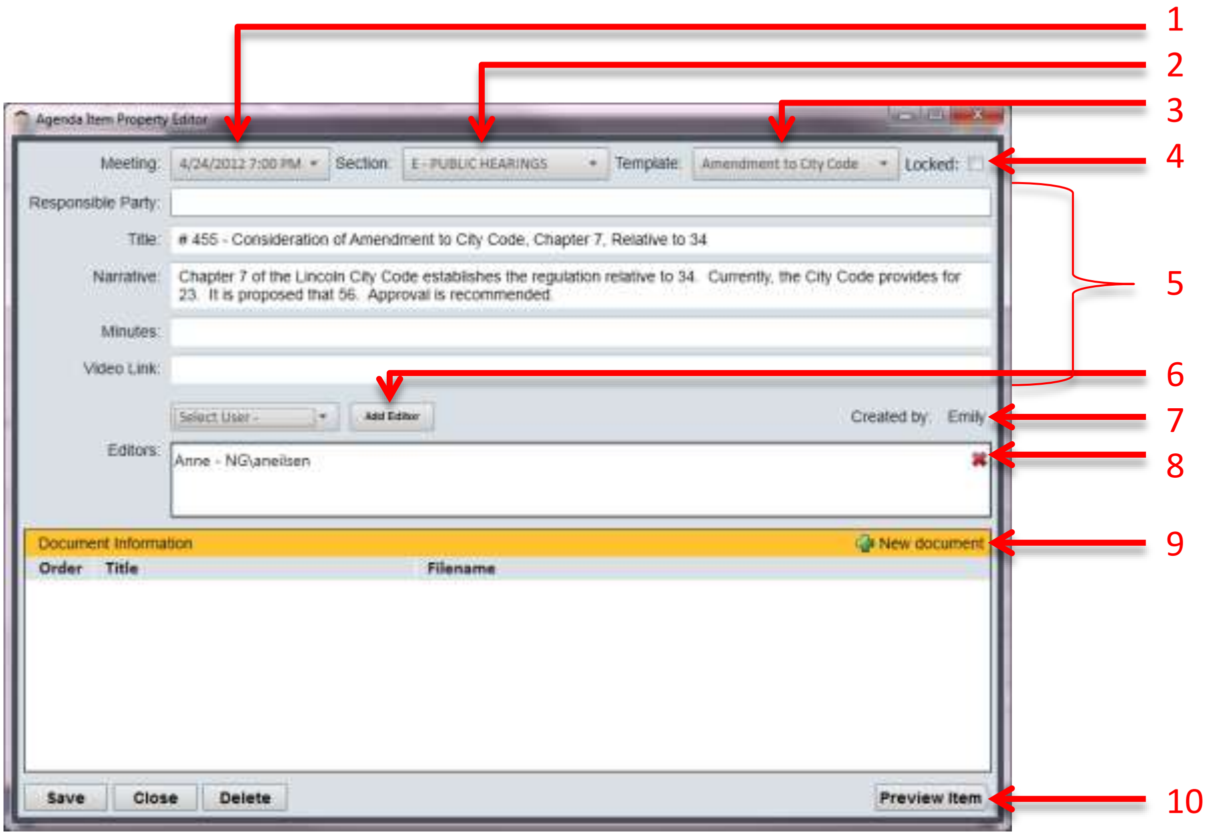

Figure 6

The Agenda Item Property Editor is used to modify the fields of an item and edit related Documents.

1. The meeting drop-down allows you to change the meeting, the packet, where the Agenda Item will appear. You may only change between meetings of the same Meeting Type (i.e., Study Session).
2. The Section drop-down allows you to change the Section, and the location within the packet, where the Agenda Item will appear. You may only switch between Sections associated with the same type of meeting.
3. The Template drop-down allows you to select from a list of Templates pre-defined by an administrator. Once selected, the Template will auto-fill the Agenda Item's title and narrative with the standard text. Templates are designed to reduce time needed for creating common Agenda Items that will often have similar text (i.e., Exchange Agreement).
4. The Locked toggle determines if the Agenda Item is available for further edits.
5. These fields display data about the agenda item. There are a few things to note:
    a. The Responsible Party field will auto-fill with data entered on past agenda items as the user types.
    b. The Title field is required.
    c. The Narrative field holds the main text for the agenda item.
    d. Only administrators can enter information for the Minutes and Video Link fields.

6. To allow a Staff Member that is not the item's creator to edit the item, you must add them as an editor. Editors are able to edit the item as if they created it.
7. The name of the creator. This person has the ability to edit the item until it is locked. Since the creator always has rights to the item, they are not available to be added as an editor.
8. The red X removes that user as an editor. They will no longer have permission to make any changes to the item. An editor cannot remove themselves as an editor of an item.
9. The Document Information list displays the documents attached to the item. Anyone with the ability to edit the item can add and modify documents. This is discussed in detail below.
10. The Preview Item button will generate and display just the part of the packet that you are currently editing. This allows you to quickly see how your changes look in packet form.

Adding Documents

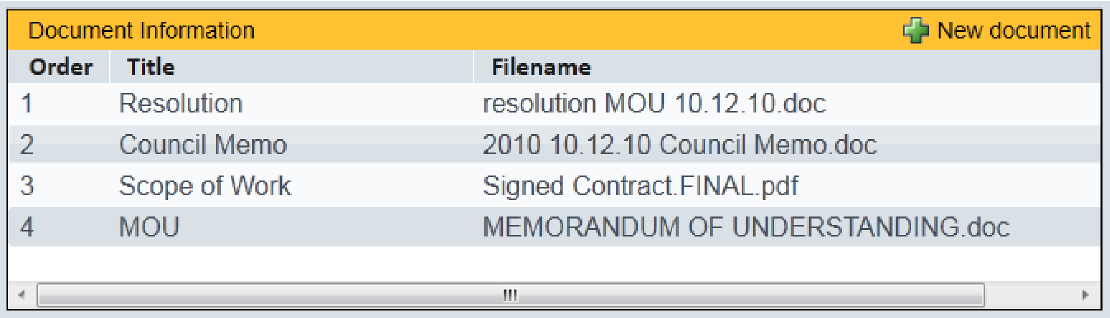

Figure 7

The Document Information list shows the basic information on each Document associated with the Agenda Item. Adding and editing Documents is very similar to adding and editing Agenda Items.

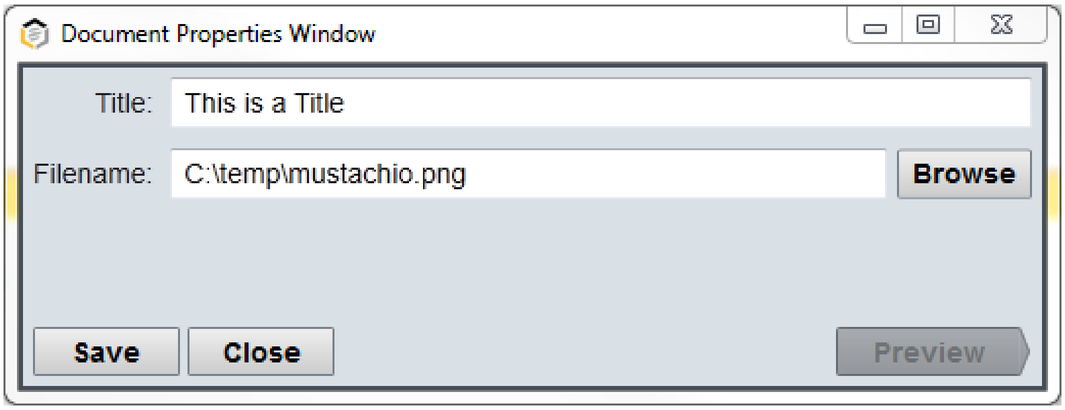

Figure 8

Complete the following to add a new Document:

1. Click on the New Document button, located in the gold bar of the Document Information list.
2. Enter a title. The Title field is required.
3. Click on the Browse button. This will open a file selection window. Select the desired file.
4. Click the Save button

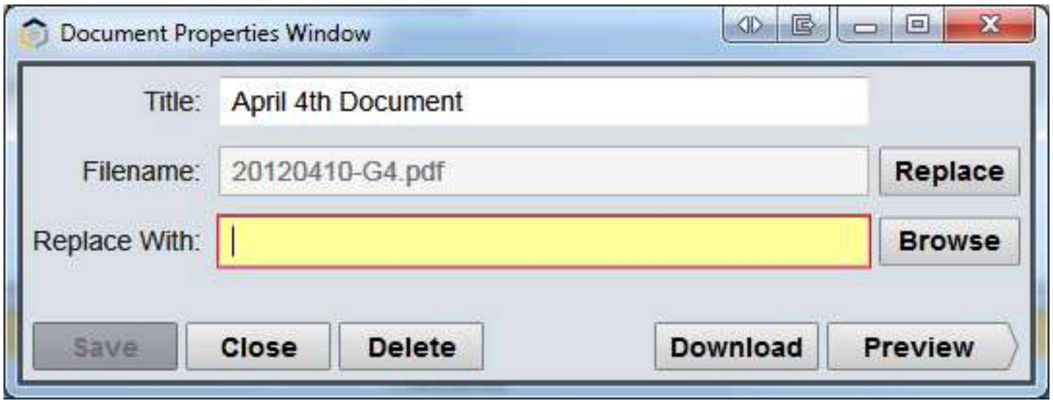

Figure 9

Complete the following to edit or replace a Document:

1. Click on the desired Document.
2. Change the desired fields.
3. To Replace the document
    a. Click the Replace button
    b. Click the Browse button
    c. Choose the new document
4. Click the Save button.

To simply view the contents of a document, click Preview. This will open the file in a read-only mode. If you need to edit the document contents, click Download. This will allow you to choose a place to save the file. Then you will be able to open the file from where you saved it. After your changes have been made, close the program you used to edit the document, and then replace the file, as described above.

Supported File types

Only the following types can be uploaded. Other types may not display correctly in the packet. If a file of another type needs to be uploaded, we suggest saving it as a PDF, if possible.

- Microsoft PowerPoint (.ppt, .pptx)
- Microsoft Excel (.xls, .xlsx)
- Microsoft Word (.doc, .docx)
- Text file (.txt)
- Rich text file (.rtf)
- Portable Document Format (.pdf)
- OpenOffice Document(.odt)
- OpenOffice Presentation (.odp)
- Images (.png, .jpg, .bmp, .gif, .tif)

Public Portal

The Public Portal is the means by which the public may browse and view meeting documentation.

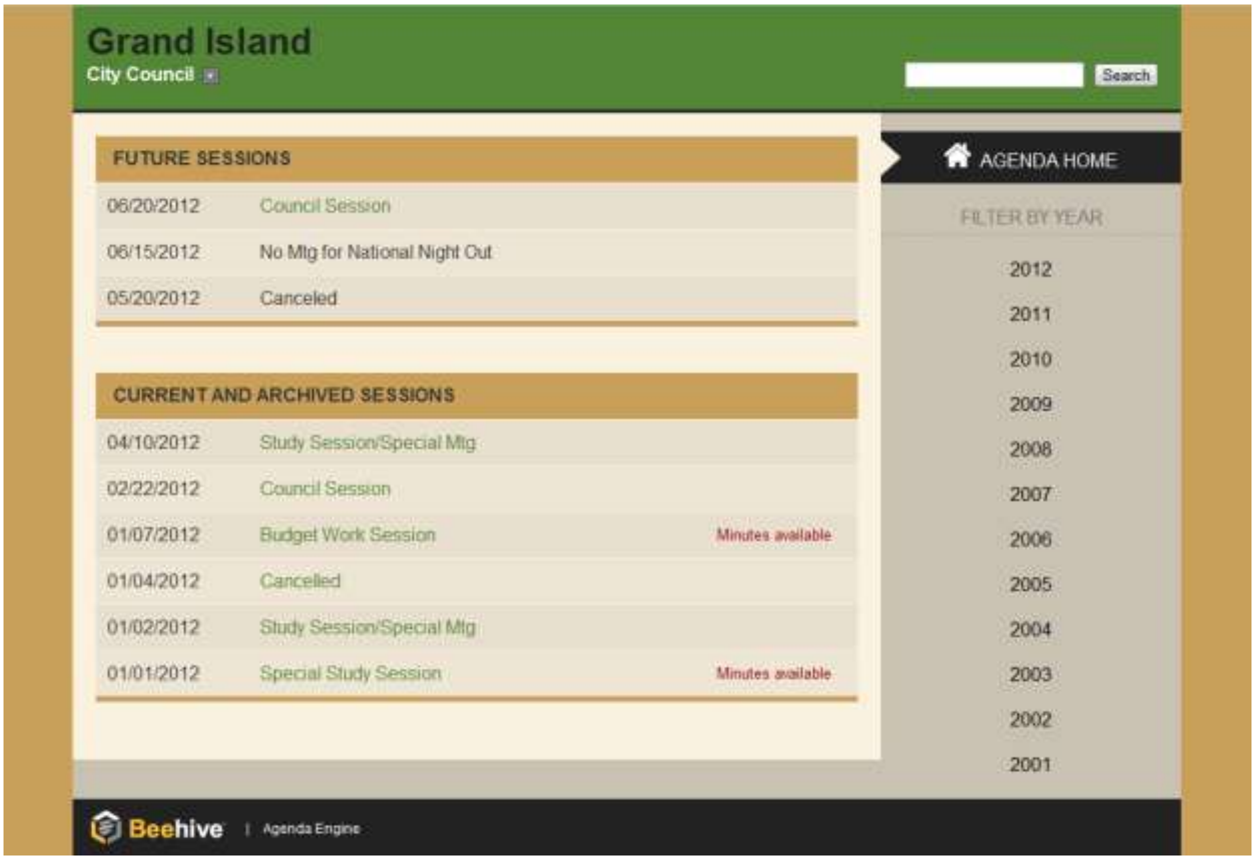

Figure 10

Figure 10 shows the home page for the Public Portal. The arrow by the Committee name is a drop-down that allows you to a select another Committee, if the customer has more than one. Based on the Committee, Meetings will be displayed in the list to the lower left. If a Meeting's Agenda has been made available, clicking the meeting will take you to the page for the individual Meeting. Meetings are displayed according to year. If you want to see Meetings from a different year, click on the desired year in the list to the right.

The Search box in the upper right corner enables users to search though all the posted PDFs for the committee. The results page lists the meeting date and type and the title of the PDF.

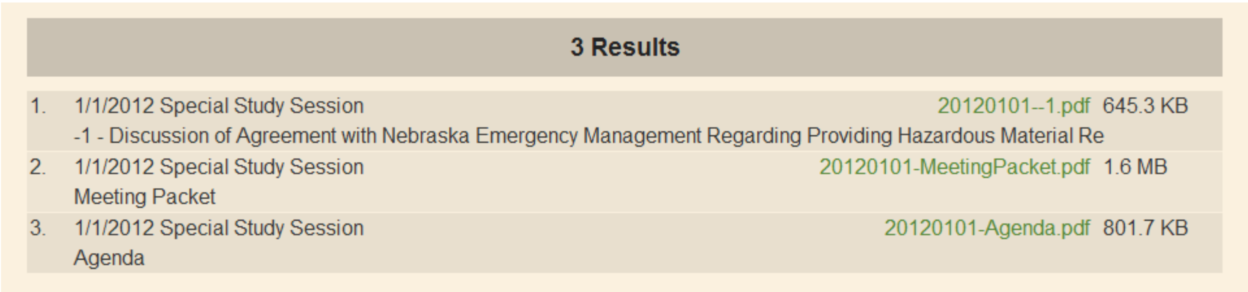

Figure 11

Figure 11 shows the screen for a selected meeting. In the top grey bar you can select to view either the entire packet or just the printable agenda for this meeting by clicking. Agenda Items are ordered by Section. You can view the PDF or video for a specific Agenda Item by clicking on the respective icon to the right. PDFs and videos are available only if an Agenda Admin has saved the meeting as Packet Available.

Agenda Admin

An Agenda Admin has unlimited rights on the Agenda and Management tabs. They may edit and add Meetings, Meeting Types, Sections, and Templates. An Agenda Admin can edit any item, including items that were created by another user or if the item is in the locked status. Admins may reorder agenda items by dragging and dropping. Dragging an Agenda Item into another Section's group will also change the Section of the item. They also generate and publish the full packet.

Agenda Tab (Additional Privileges)

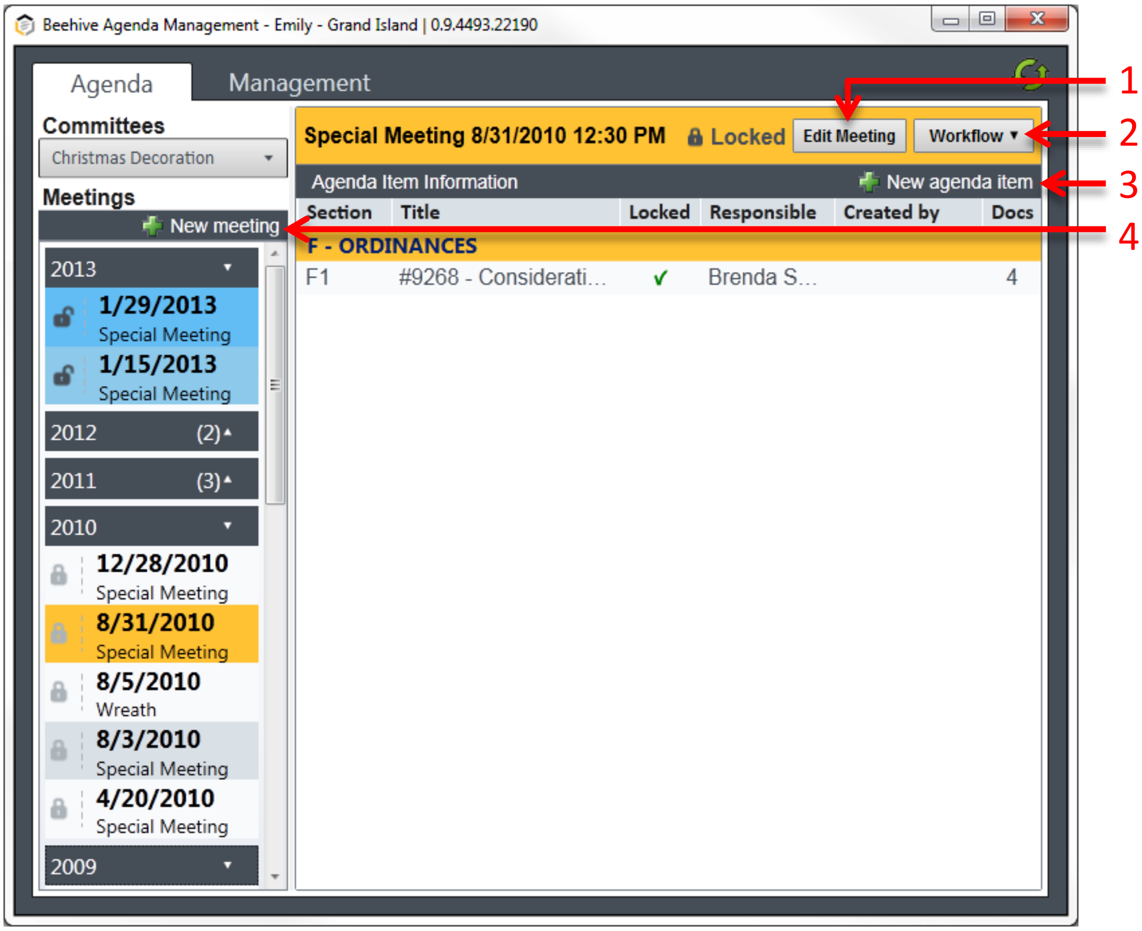

Figure 12

1. This allows an administrator to edit information about the selected meeting. This is discussed in depth in the next section.
2. The preview button becomes the Workflow button for administrators. Various actions about the packet and permissions are set here. These are detailed in a later section.
3. Administrators can add new items to all meetings, even locked ones.
4. This will create a new meeting. It uses the same procedure as editing an existing meeting.

Edit Meetings

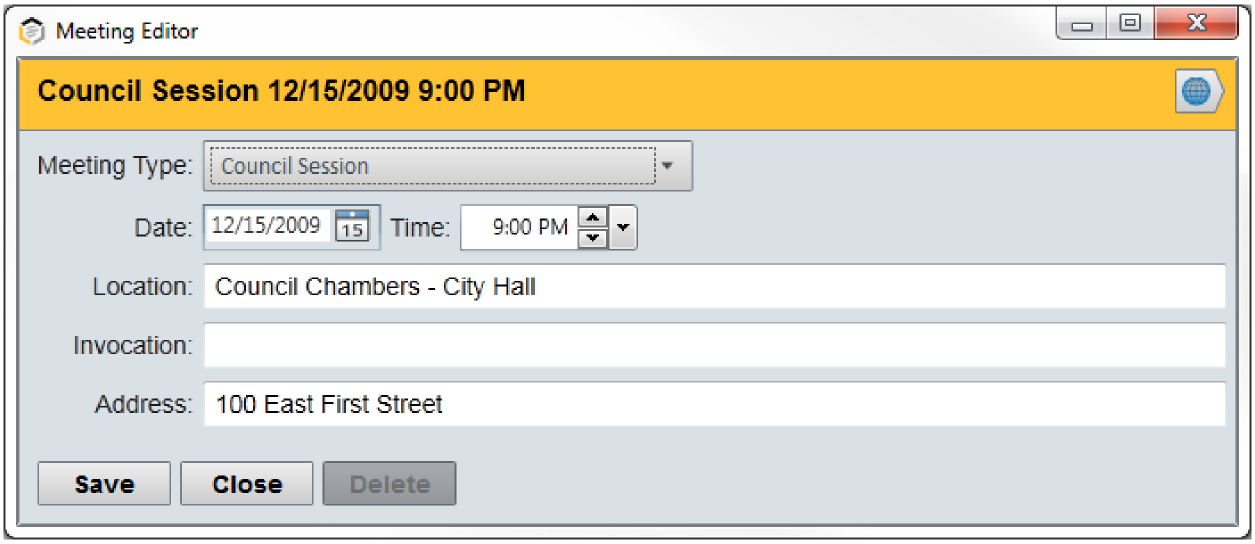

Figure 13

An Agenda Admin has the ability to edit all aspects of the meeting. They can create, save, and delete meetings. They can do this by clicking on the Edit Meeting button in the top gold bar. This will display the dialog which you see in the screenshot above. The user can change the Meeting Type by using the drop down. The date field uses a calendar to select the date and you can also change the date by entering text. The time provides a drop down menu to select times on the hour and you can also enter the times manually. You are also given textboxes to change the Location, Invocation, and Address. If the Meeting is listed as Agenda Available, the button in the top right corner linking to this Meeting on the public website will appear. Only unlocked Meetings may be deleted.

Workflow

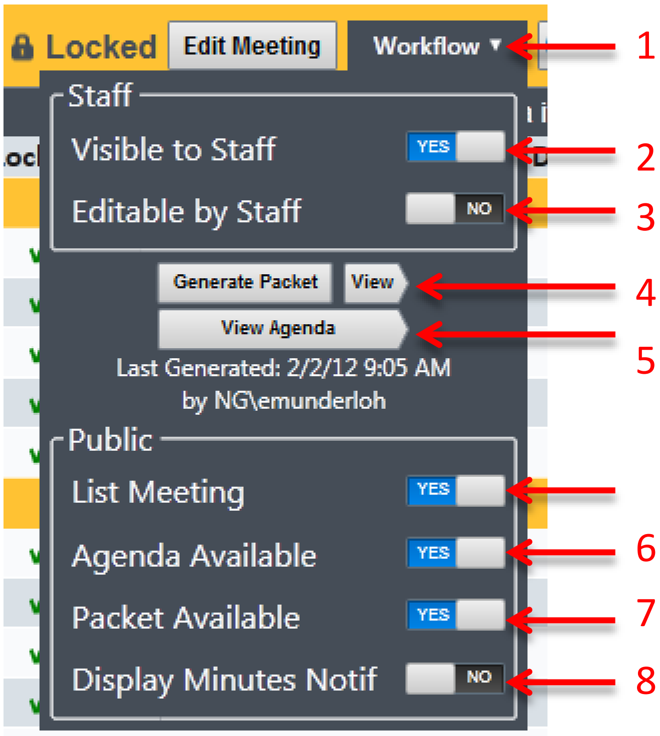

Figure 14

1. The Workflow button displays the drop-down. The Workflow allows you to manage the availability of your packet in one place.

Staff Section

2. The Visible to Staff toggle determines whether the current Meeting is listed for Staff Members
3. The Editable by Staff toggle is used to lock or unlock a meeting. Staff Members cannot edit any portion of a locked meeting. The meeting must be locked before packet generation is enabled.

Generation

4. The Generate Packet button compiles and uploads the full Meeting Packet to the public website. Once the packet is generated, the View button displays the full packet. Once the packet has been generated, this button will be disabled until the meeting has been modified in some way. If the Generate Packet button is not visible, the data has been migrated from a previous system, so generation is not possible.
5. The View Agenda button displays the agenda for the meeting. This is only available after a packet has been generated.

Public Section

6. The List Meeting toggle determines if the Meeting is listed on the public website.
7. The Agenda Available toggle allows the Meeting Agenda (Meeting summary) to be viewed. To toggle, a generated packet must exist.
8. The Packet Available toggle is used to change visibility of the full packet on the website. To toggle, Agenda Available must first be “Yes”
9. The Display Minutes Notif adds the text “Minutes available” next to a meeting on the public website. To set this value, Packet Available must first be “Yes”. This does not add Minutes to the packet. You must regenerate the packet to add Minutes.

Management Sub-Tabs Overview

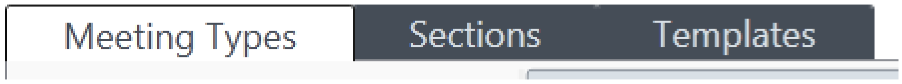

Figure 15

The Management tab has three sub-tabs: Meeting Types, Sections and Templates. These tabs all have the same basic format: drop-downs and a list on the left allow you to select an item while the right side of the tab is reserved for editing the item.

Figure 16

Meeting Types

Meeting Types are used as a classification for Meetings you define. Complete the following to create a new Meeting Type:

1. Select a committee. This fills the Meeting Types list and enables the New Meeting Type button.
2. Click on the New Meeting Type button found in the dark grey bar above the list of Meeting Types.
3. This brings up a drop-down and a textbox on the right side. Fill these out and you can then save the new Meeting Type.

When a Meeting Type is deleted, the Sections and Templates associated with it are also deleted. Any Meetings created with the deleted Meeting Type will remain, but you will no longer be able to change their Meeting Type.

Sections

Sections are used as a classification for Agenda Items. Complete the following to create a new Section:

1. Select a committee and a Meeting Type. This will fill the Sections list and enable the New Sections button.
2. Click on the New Section button found in the dark grey bar above the Sections list.
3. Fill out the required information and then the Section can be saved.

When a Section is deleted, the Templates associated with it are also deleted. Any Agenda Items in the deleted Section will remain in that Section until the item is edited, then it must be moved to an existing Section.

Templates

Templates allow you to predefine titles and narratives common to Agenda Items. Complete the following to create a new Template:

1. Select a committee, a Meeting Type and a Section. This will fill the Templates list and enable the New Template button.
2. Click the New Template button found in the dark grey bar above the list of Templates.
3. Fill out the required information and then the Template can be saved.

Deleting a Template will not affect any Agenda Items that have been made using the Template.

Super Admin

A Super Admin is responsible for managing users and committees. The Administration tab is where you can add new users to the system and assign them to a committee. You can also manage the permission level of users per committee. A Super Admin can also do everything that a Staff Member and Agenda Admin can do.

Committees

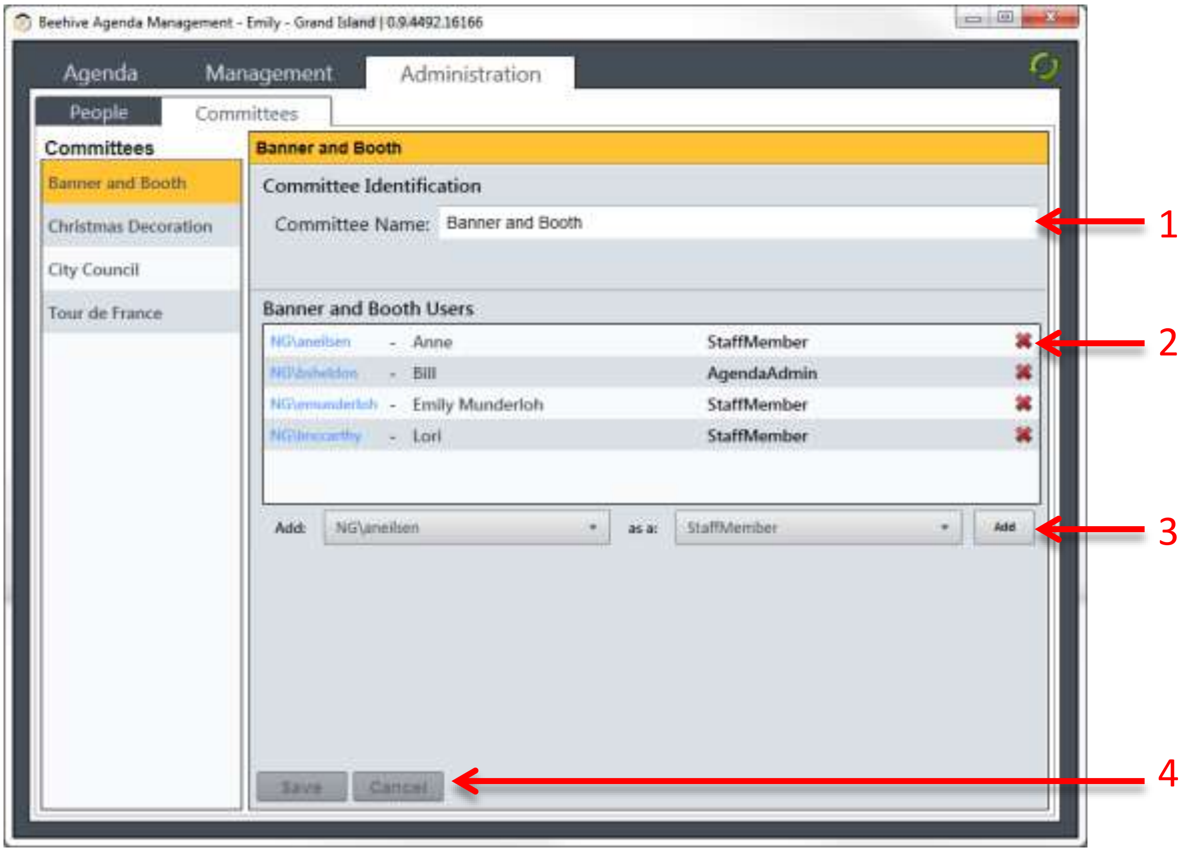

Figure 17

1. Committee Name (required) - This is what is displayed throughout the application and public website
2. Delete User's Permission - Removes the selected User from being able to access this Committee's data
    a. No save is needed
3. Add a User to Committee with Permission - Assigns a user to the committee with a certain role
    a. No save is needed
4. Save - Saves Committee name changes to the system
   Cancel - Cancels the current Committee name changes

If a Committee needs to be added or removed, you must contact support.

People

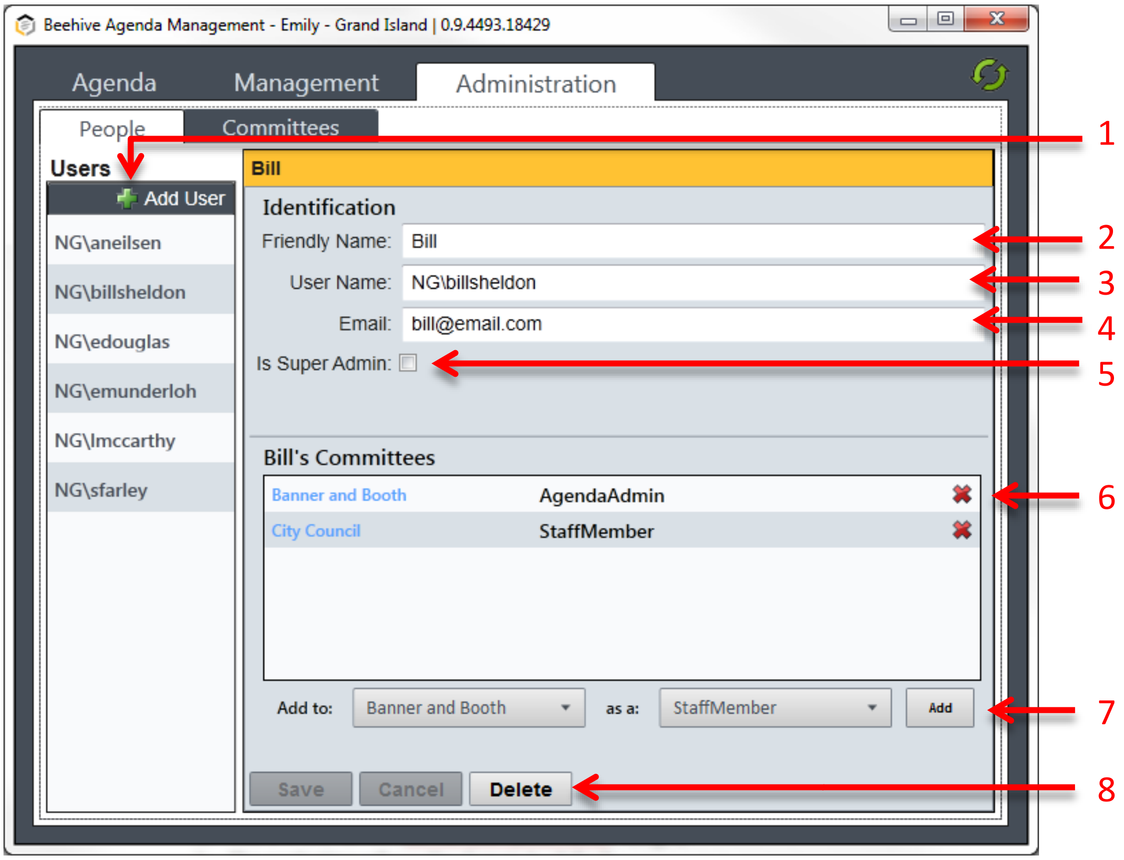

Figure 18

1. Add User - Used to create a new user and add them to the system
2. Friendly Name (required) - This is what is displayed throughout the application for that user
3. User Name (required)
    a. This is in the format {domain OR computer name} \ {login}
        i. Ex: **NG\billsheldon** where **NG** is the domain and **billsheldon** is the login
    b. The application will use the domain by default
        i. If the computer is not on a domain, the computer name will be used instead
4. Email - Used for support issues for the user
5. Is Super Admin - Indicates whether the user is a super admin
6. Delete Committee-Permission - Removes the selected User Committee-Permission association
    a. No save is needed
7. Add to Committee with Permission - Assigns the user to a committee with a certain role
    a. No save is needed
8. Save - Saves the user to the system
   Cancel - Cancels the current changes
   Delete - Deletes the user from the system
    a. This will remove the user from the list
    b. If you need to add this person again, you must manually do so

Troubleshooting

Below are the most common errors. If you encounter something not found here, please contact support.

General

- The current Windows user '[username]' does not have the correct permissions. Note the error and contact Support.
  - You should contact your committee's Super Admin and verify that your username is spelled correctly and that you have access to your committee.
- The application could not reach the intended service. Please check your internet connection and try again.
  - Our application needs an internet connection to run properly. Verify your internet is working correctly. If it is, restart the application. If the problem is still not resolved, please contact support.

Editing Meetings and Agenda Items

- The selected meeting type does not contain any sections and this meeting can't be saved.
  - An administrator must add some sections for this meeting type before a meeting may be created with the selected meeting type.
- All agenda items will now be changed to the first section of the new meeting type.
  - By changing the type of meeting, the section options are different. Therefore, agenda items must be changed to a section belonging to the new type.

Attaching Documents

- File format [file type] is not supported.
  - This file type does not merge into the packet correctly. In this case, we recommend saving the file as a PDF before uploading.
- Local file does not exist.
  - The file you are uploading could not be found. Verify the file exists and that there are no spelling errors in the file path.
- You must have a unique document file name.
  - Due to naming restrictions, each agenda item can only upload one item with a specific name. Rename the file and retry upload.
- The process cannot access the file '[file path]' because it is being used by another process.
  - You have the file open in another application, i.e. editing a Word document. Save and close the other application and retry upload.

Generating Packets

- Template does not exist on Azure, aborting.
  - The template used to generate the packet is missing. Please contact support.

Contact Support

If you have questions or concerns, feel free to contact us at support@beehiveindustries.com.