3. What is the best suggested view for the Board to use during meetings (Agenda, Smart Minutes or Attachments)?

Created by Pat Crosscombe, Modified on Mon, 11 Nov 2019 at 11:49 AM by Jasmine Vary

SMART minutes definitely. The agenda is in the SMART minutes and they can switch views to check on the attachments during the meeting and then switch back to SMART minutes.

Best Practices for Naming Documents

Created by Pat Crosscombe, Modified on Mon, 20 Jun 2022 at 05:03 PM by Pat Crosscombe

Managing documents is a challenge. Consistent naming practices are essential otherwise different users will name documents differently and before too long users are confused and have difficulties finding the correct version of a file.

In BoardSpace, every document needs to be identified with at least one tag. Two to three tags is recommended as optimal. Documents must still be identified carefully even when using a tagging system like in BoardSpace because users will still need to pick the right document from the filtered list. The tags do not help if the list of potential documents contains file names that are vague, inconsistent or confusing.

There are many naming conventions that could be followed. The key to success is to decide on a convention, create a reference or policy document that clearly outlines the specifics and be rigorous and consistent in its use.

Example Considerations to include in a Naming Convention Policy

1. Start file names with a brief description. Be short, but add enough details so that every file is different and stands out. Start with the broadest or biggest concept first and then narrow or refine.

2. Always make sure new documents are named correctly when adding them to BoardSpace. Don't wait to correct a name later.

3. DO NOT use special characters such as /:"@#$

4. DO USE underscore_or Capitals.

5. Use a version number. Most documents get revised, so make it a habit to add v1 to the file name the first time the document is added unless absolutely certain that the document is final. That way the next version is v2 and so on.

6. Add the author's last name, only if applicable. In most cases it is not relevant for finding a document.

7. Add a date. The file upload date is not necessarily the correct date as the document could have been created months earlier before being uploaded to BoardSpace.

8. Always use the same name for an updated document and add a new version number. Never change a revised document's name each time it is revised or updated.

Good Examples

a) Monthly_Financial_Statements_2022June

A document about monthly financial statements for the month of June.

b) HRPolicy_CEO_Compensation_2022_v1

A policy document for review that outlines how the organization's CEO will be compensated.

Improving Poorly Named Documents

a) JuneReport2022.pdf

This is not a useful document title. It is vague and could be about anything. A more descriptive title would make it easier to know what the document is about.

An improvement is "Report_Operating_Expenses_June2022"

Worse still is the example "TR_2022-6-15 112559.pdf" What this document is about, no one knows!

b) 2022_CEOv1_Compensation_2022.pdf

An improvement to this title would be "CEO_Compensation_2022_v1.pdf."

A further improvement would indicate what the document is about. For example, is this a policy document for review that outlines how the organization's CEO will be compensated or is a document that provides the CEO's compensation in 2022.

"CEO_Compensation_Policy_Guideliness_2022_v1.pdf."

c) Draft 2022 V2 AA-FWA Non-Consolidated yr ended Feb 28, 2022.pdf

I suggest removing the date confusion and adding the draftv2 at the end. The specific date of Feb 28 for year end is not needed.

AA-FWA_FinancialStatments_Non-Consolidated_FY2022_draftV2.pdf

d) June22 Treasurer's report--final-June 8.pdf

One of the dates must be removed and show dates at the end of Improving this document would eliminate one of the two dates and a final. A better

An improved title is Treasurers_Report_Final_June2022, but it is unclear as to what the treasurer's report contains.

e) Insurance 2022 AGM.pdf

Another example of a vague title. Is this a new insurance policy being proposed, a copy of the existing policy or a general discussion about insurance? Also, it is not clear why AGM would be needed at the end of the title.

InsurancePolicyComprensive_2022

Naming documents is more than simply throwing words together randomly. Naming conventions when followed rigorously allow users to find their documents fast and easily. It does take work getting used to a new naming convention but users will be very happy when they can find with they are looking for.

Don't forget to add 1 - 3 tags that facilitate finding each document.

More about tags

About the Meetings Page

Created by Pat Crosscombe, Modified on Wed, 18 Oct 2023 at 04:49 PM by Pat Crosscombe

(Click on an image to enlarge it.)

Navigating the Meetings Page

Shows a list of all board meetings.

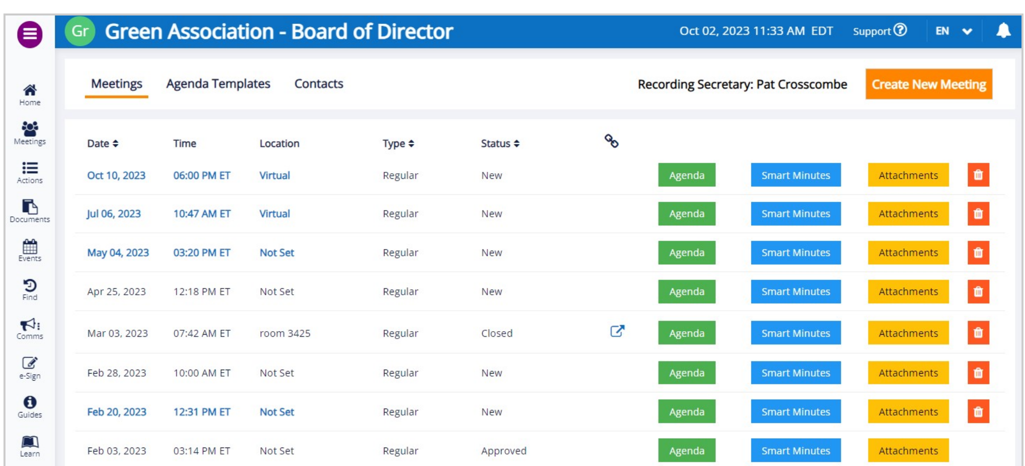
Meeting Status

- New - the meeting has not been called to order
- Closed - the meeting has been adjourned.
- Approved - the meeting has been approved by a motion of the board. The minutes are converted to a pdf and can't be edited further

Meetings can be deleted only by a recording secretary. Be careful as this action can not be undone.

Agenda templates are created via Agenda Templates

Agendas, Minutes & Attachments can be created or reviewed



Top Navigation Menu

Agenda templates - for creating agenda templates

More about **Agenda Templates**

Contacts

Name	Title	Term	Start	End	
Brad Leman	Director edit	2 Years	Jan 2022	Feb 2024	more
Guy Vellna	Chair Housing Advocacy edit	3 Years	Jan 2022	Jan 2025	more
Jane Ford	edit				more
Jeff Watson	Director edit	1 Year	Aug 2021	Sep 2022	more

Includes name, title. Terms and term start and end date can be added.

Clicking on more shows email address and phone number (if added)

Board Admins can enter term information - click on drop-down menu at the top left and go to manage users.

Meeting Details

Date	Time	Location	Type	Status					
Dec 19, 2022	08:00 PM ET	Room 456	Regular	New		Agenda	Smart Minutes	Attachments	

Date - meeting date

Time - of meeting including time zone

Location - where the meeting is being held.

If the text is "blue" the information can be edited. Click on it, make changes in the popup.

Type

- Regular (for monthly or less frequent meetings of the directors)
- Annual (for Annual or Annual General Meetings of the owners or members)
- Special (for infrequent "special" meetings where the owners or members are invited to attend. Do not use for a meeting of the directors)
- Committee (for informal meetings held by the directors)

Status

- New - for meetings that have not yet been called to order
- Closed - for meetings that have been adjourned.
- Approved - for meetings where the minutes have been approved.

	Allows a video conference link to be added here
Agenda	Click on button to create or view agenda
Smart Minutes	Edit or Access minutes
Attachments	Organize or access meeting attachments

	Delete a meeting (action can only be completed by a board admin or recording secretary)

Updated October 2023 (linked to Help)

Actions

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 02:25 PM by Pat Crosscombe

What is an Action?

An **Action** is a task or part of a task that needs to be accomplished. then usually be reported at a subsequent meeting.

A task might be to write and get approved a set of Terms of Reference for a committee. An Action might be to complete the first draft of the Terms of Reference.

In this case, the Due Date would be the date by which the Action should be done so that a copy can be posted for review by attendees before the next meeting. However, the Action cannot be marked as complete before the meeting, or it will not appear in the Action Review item of the minutes.

At the meeting, the draft might be approved as the final Terms of Reference, in which case the Action can be marked as complete. Or, a second draft might be requested, in which case you might complete the current Action and create a new one, or you might modify the Action to show that it is draft 2, with a new due date, and maybe even assigned to a different person.

Updated Sept 2023 [NU]

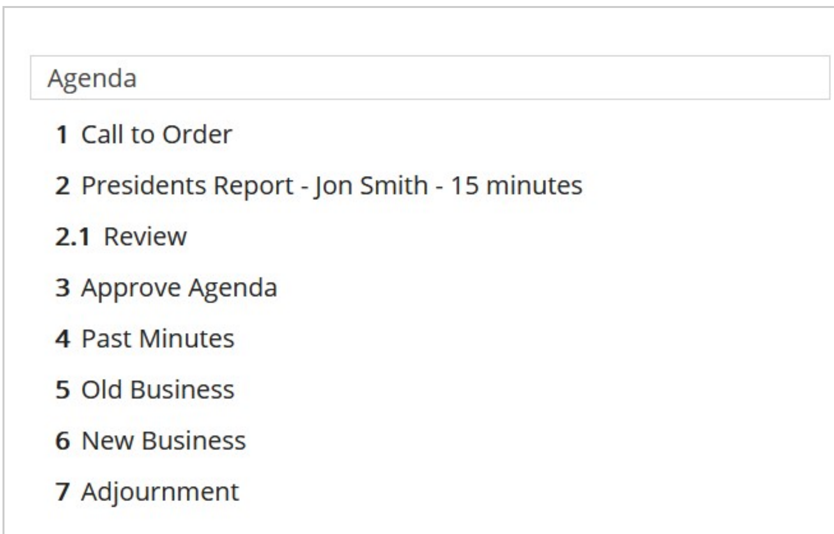
What are the different types of agenda Items?

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 02:29 PM by Pat Crosscombe

There are 9 different agenda item types. Call to Order and Adjournment are automatically included in every agenda. The others are optional.

1. Call to Order (mandatory & automatically added)

2. Agenda - using this item adds the agenda to the beginning of the minutes.

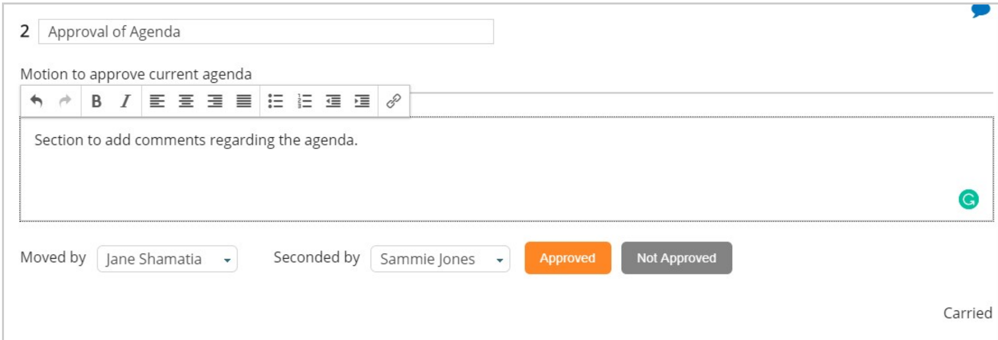


Use this item if you want the agenda to show in your minutes.

3. Approval of Agenda

Approval of Agenda creates the motion to approve the agenda and includes a drop-down menu with the eligible voters.

This makes is faster to approve the agenda since the motion is already prepared. If there are comments regarding the agenda, they can be added in the text box.

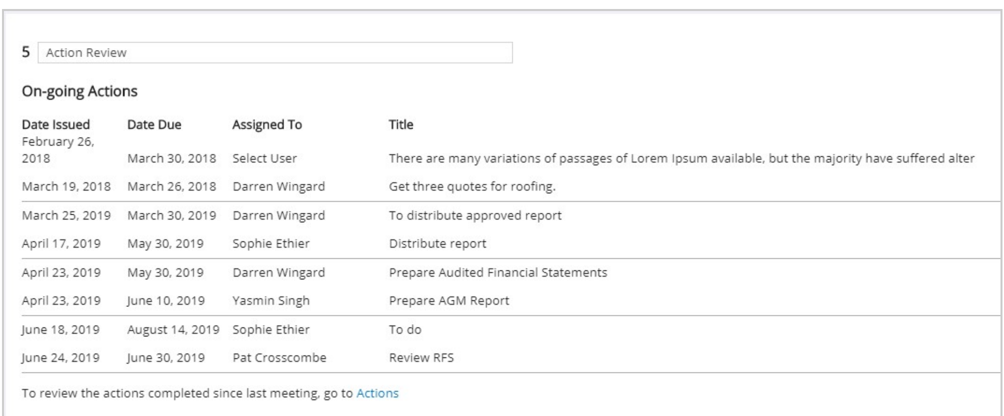


4. Past Minutes

Past Minutes is used to approve past minutes (those minutes created using BoardSpace). Once approved, they are converted to a pdf document format that can't be edited. If you are using

5. Action Review

Action Review module imports the board's ongoing actions into a list. Each action item is a live link so that if you hover over the action and click you go to the main action list and can see the details, add comments, postpone or complete the action.



5 Action Review

On-going Actions

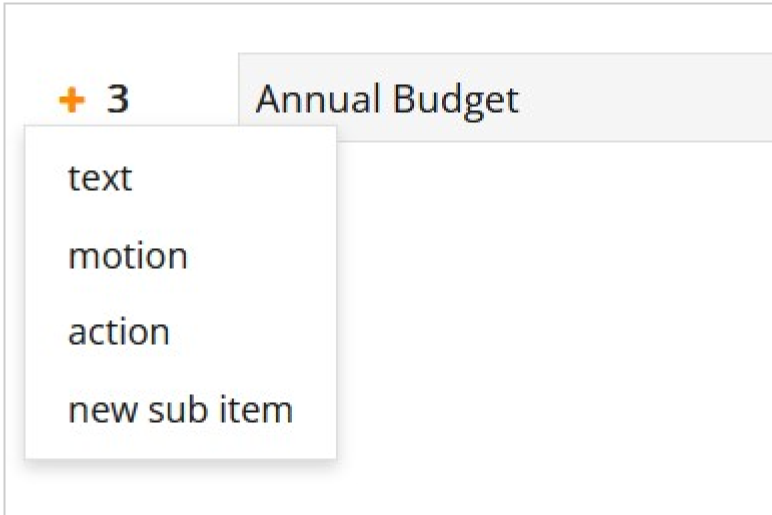
Date Issued	Date Due	Assigned To	Title
February 26, 2018	March 30, 2018	Select User	There are many variations of passages of Lorem Ipsum available, but the majority have suffered alter
March 19, 2018	March 26, 2018	Darren Wingard	Get three quotes for roofing.
March 25, 2019	March 30, 2019	Darren Wingard	To distribute approved report
April 17, 2019	May 30, 2019	Sophie Ethier	Distribute report
April 23, 2019	May 30, 2019	Darren Wingard	Prepare Audited Financial Statements
April 23, 2019	June 10, 2019	Yasmin Singh	Prepare AGM Report
June 18, 2019	August 14, 2019	Sophie Ethier	To do
June 24, 2019	June 30, 2019	Pat Crosscombe	Review RFS

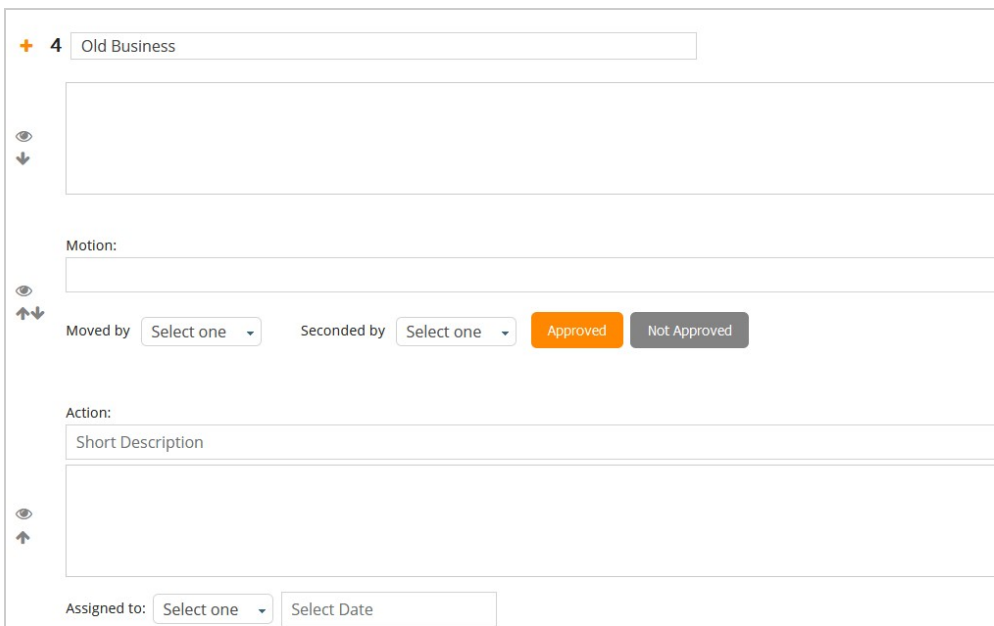
To review the actions completed since last meeting, go to Actions

6. Item

Items need text boxes, motions, and actions to be added as needed (as many of each can be added).

Click on the orange + to add a text box, motion, or action item or add a sub-item to the agenda item.

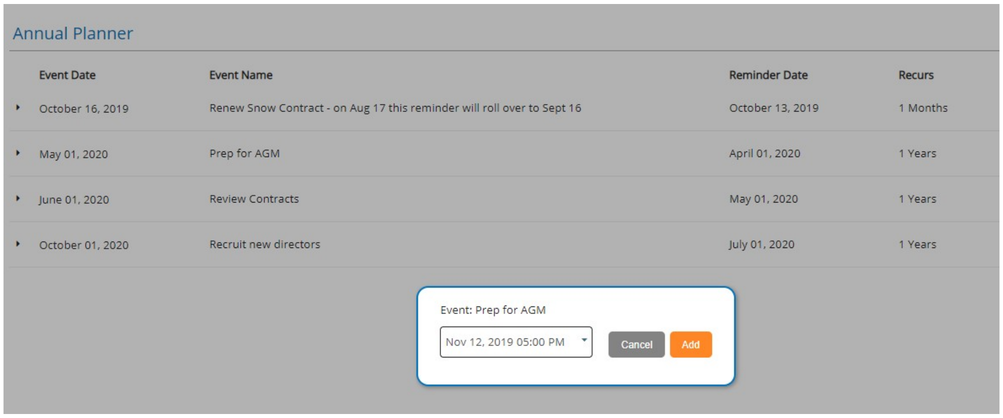




7. Ongoing

There are two types of ongoing items.

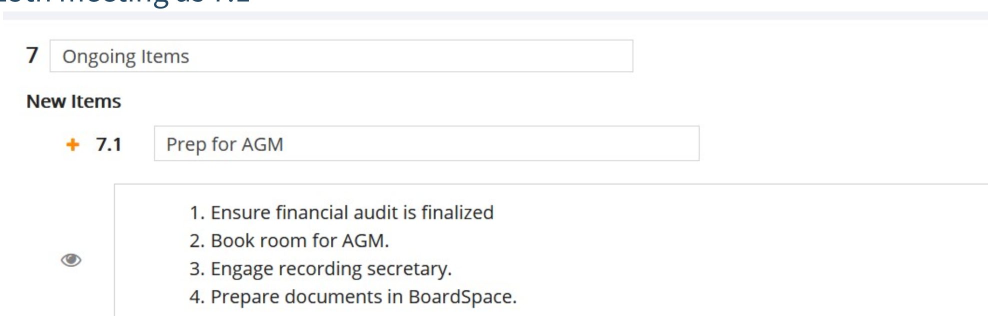
a) Events Items



When it comes time to discuss an Event at a meeting it can be added by clicking on the button "Add Event to meeting" and selecting the meeting date from the drop-down list.

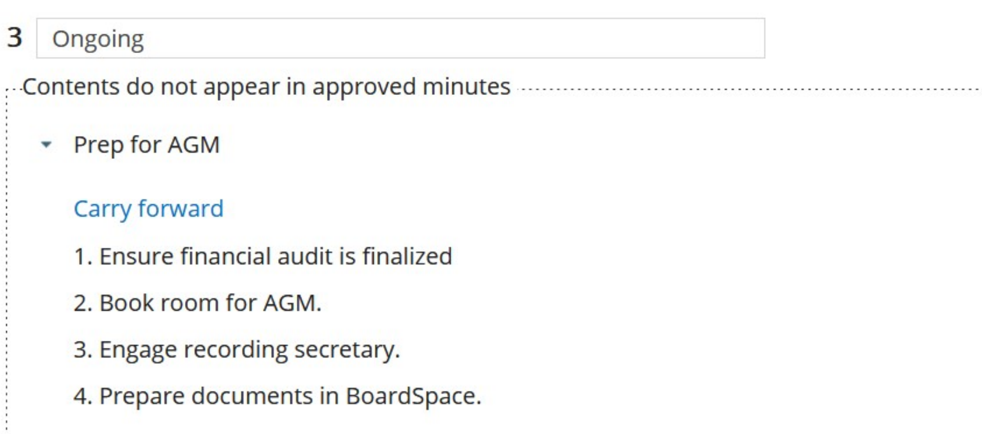
An Ongoing agenda item is automatically added to your agenda and populated with the selected Event.

In the screenshot below, the Prep for AGM event has been added to the Oct 15th meeting as 7.1

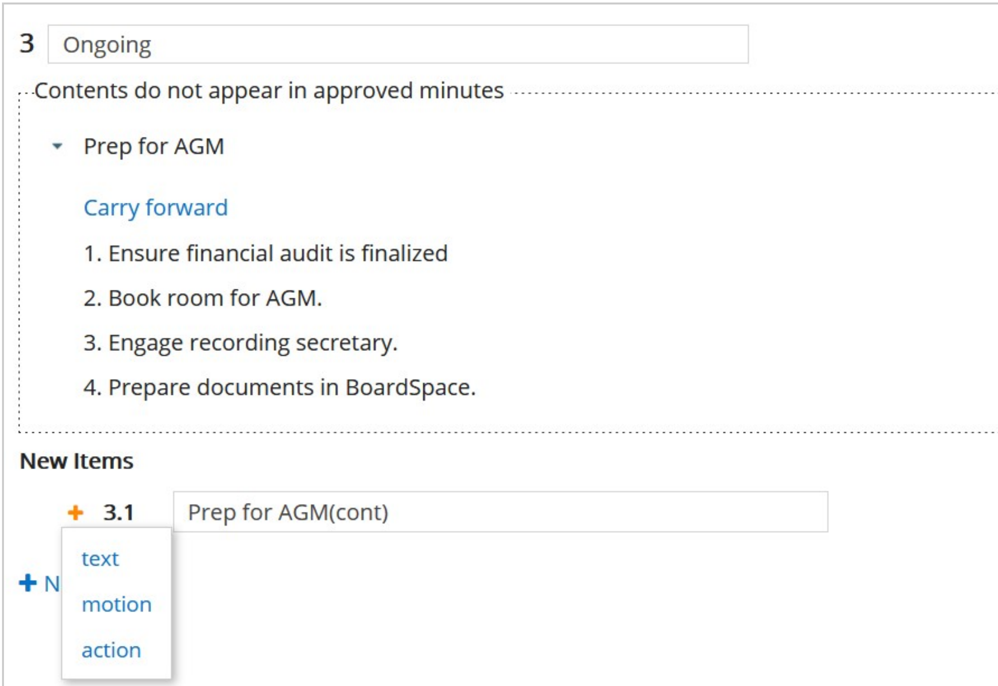


A text box, motion, or action can be added to the Prep for AGM event.

In the next meeting subsequent to the Oct 15th meeting, add the ongoing module and note that the "Prep for AGM" event is present in the minutes in a special section as shown below.



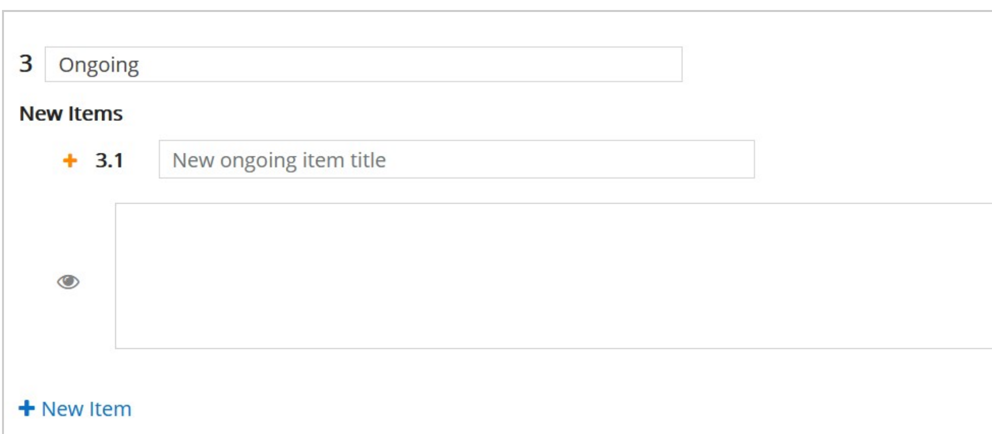
If needed, the Prep for AGM event can be discussed at a 2nd meeting. Click on Carry forward. The Prep for AGM shows up as item 3.1 with (cont) after the title. A text, motion or action can be added. An item can be carried forward as long as needed.



b) Any item that needs to remain on the agenda for more than one meeting.

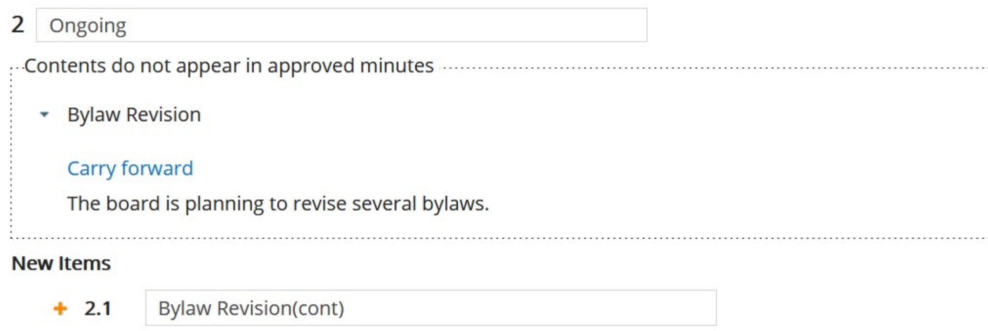
Any agenda item can become an ongoing item.

Add the Ongoing module to the agenda. Click on +New Item. This added 3.1 Add a motion or action as needed.



The following month add the ongoing module. Item 3.1 will show up.

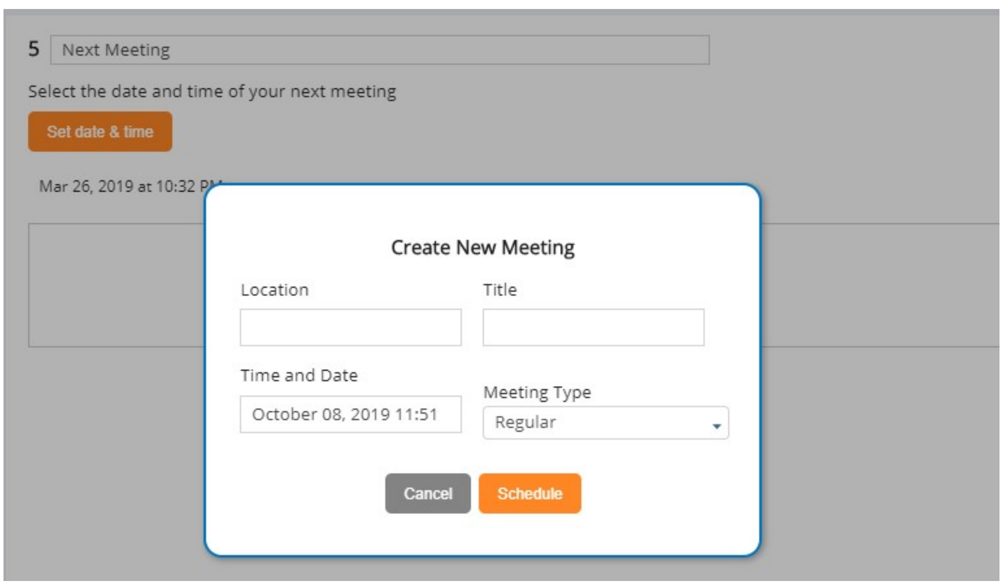
To include the item in the minutes click on Carry forward



The item Bylaw Revision has been added as 2.1.

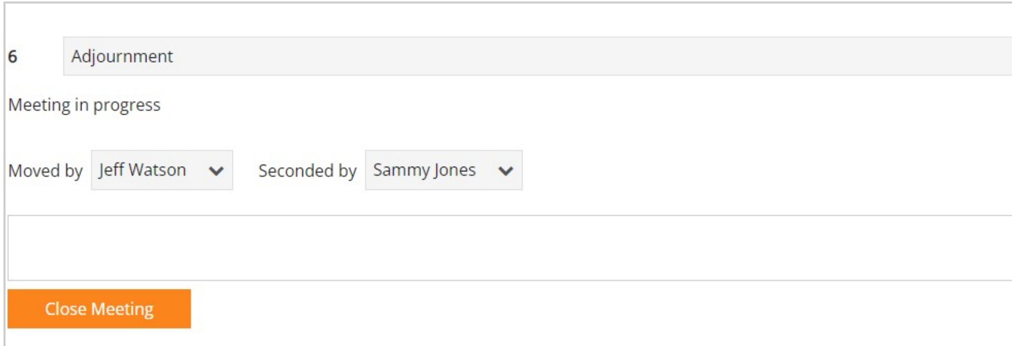
8. Next Meeting

Click on Set date & time. A Create New Meeting popup lets you create a new meeting and will also show up in the meeting list.



9. Adjournment (mandatory & automatically added)

Adding a second person for adjourning a meeting is optional.



After clicking on the orange "Close Meeting" button, and clicking on the orange "Yes" button, the time is added automatically (from the date and time stamp of your computer). If you check the "Set time manually" box, the date and time is set from a calendar popup.

Updated Sept 2023

An overview of BoardSpace Features for Directors, Officers & Managers

Created by Pat Crosscombe, Modified on Wed, 22 Jul 2020 at 05:52 PM by Pat Crosscombe

Where to login

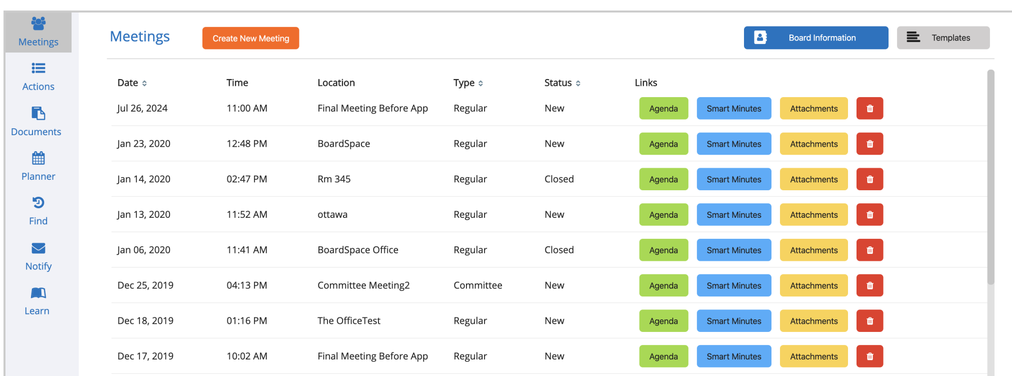
Go to https://app.boardspace.co

or https://boardspace.co Login button is in the top right corner.

Features

Meeting list

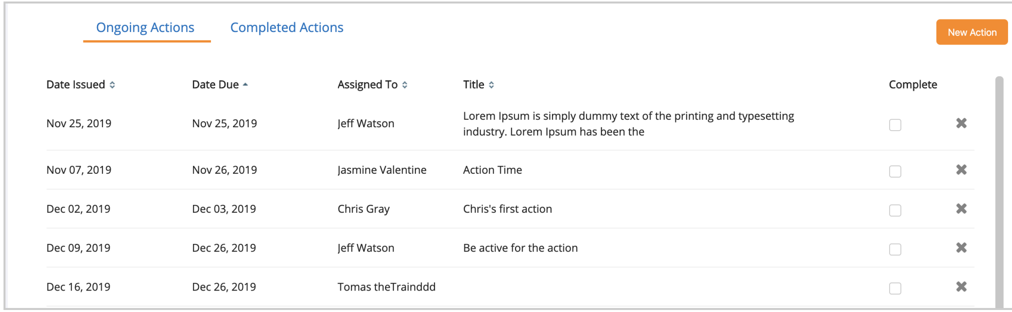
The meeting list page is the homepage for each board or committee. It contains a list of meetings, date, time, location and the type of meeting. There are buttons that link to agendas, minutes, and attachments as well.



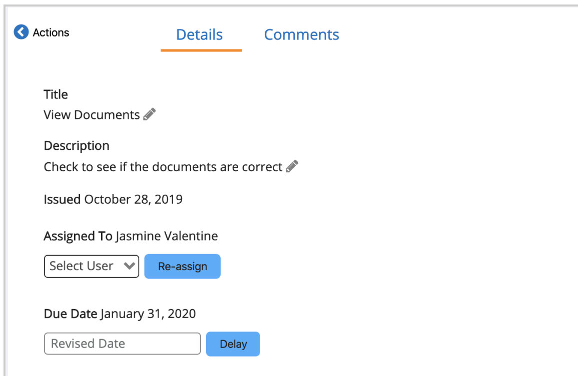
In the board information, there is a list of directors and managers with their contact information.

Actions

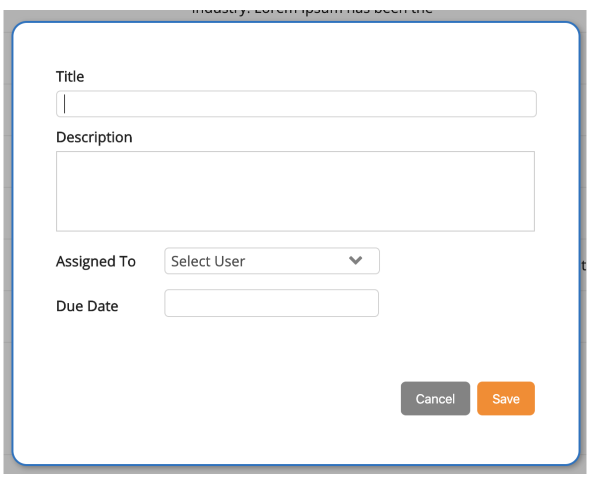
The action tab shows a list of ongoing and completed actions.



View additional details or comments.



Create a new actions by clicking on the New Action button.



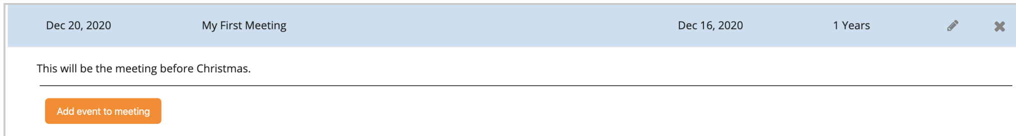
Documents

This section provides access to all of the records for an organization.

Planner

The annual planner shows a list of important events in the life of a board-led organization. These events reoccur on a weekly, monthly, or yearly basis or could also be a one-off event. One example of a reminder to send out is an AGM. Reminders are sent to inform the necessary board members of when the event is occurring and can also be turned off.

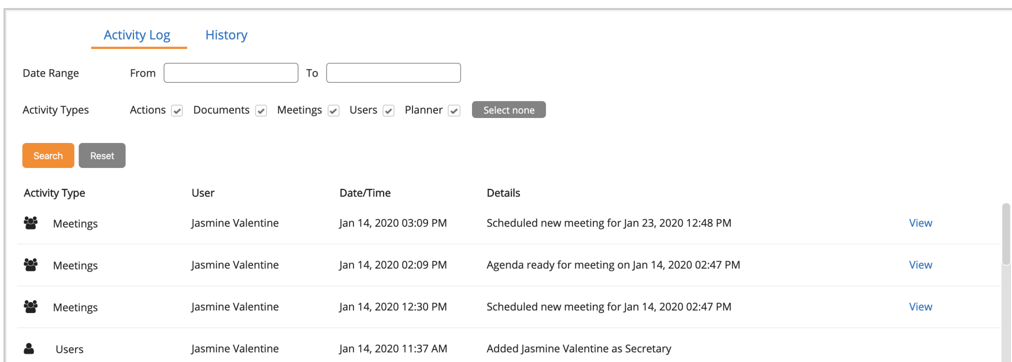
Additional details/notes can be added and viewed by opening the dropdown.



Find

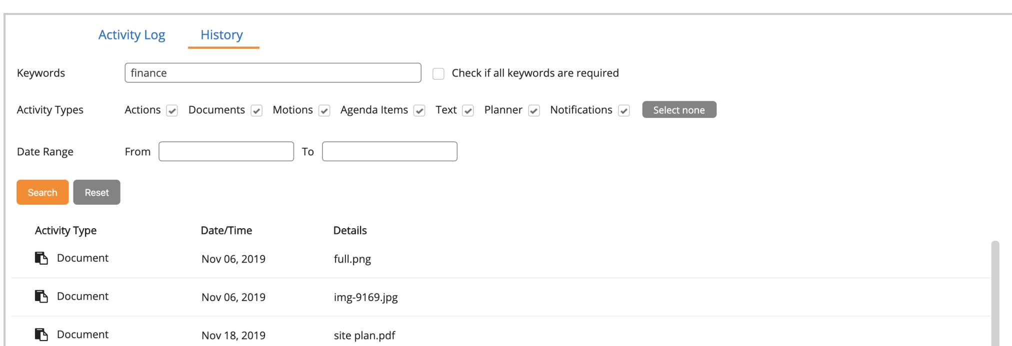
There are two parts to Find:

The activity log includes a record of items such as adding or removing documents, adding or removing users, status changes to actions, new meetings and so on. It gives an overview of everything everyone has done inside of BoardSpace.



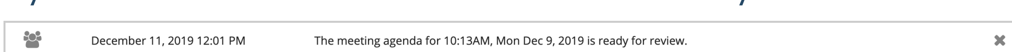
History

Use a keyword search to find information about any action, motion, agenda item, text, planner or notification that includes the keyword.

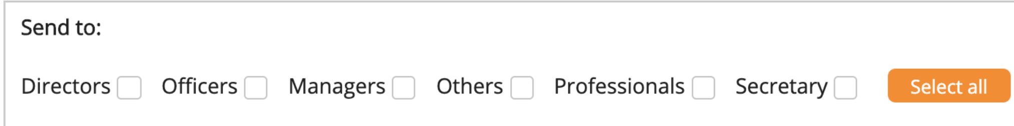


Notify

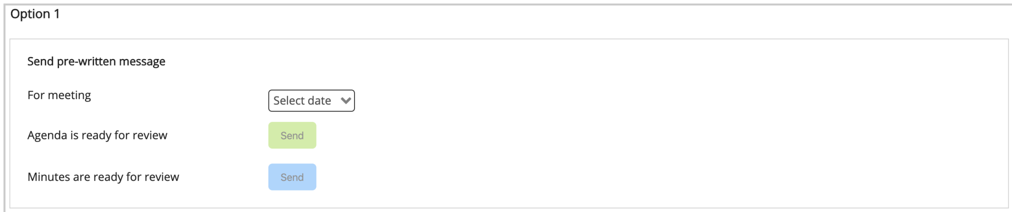
My Notifications - shows the notifications received by a user.



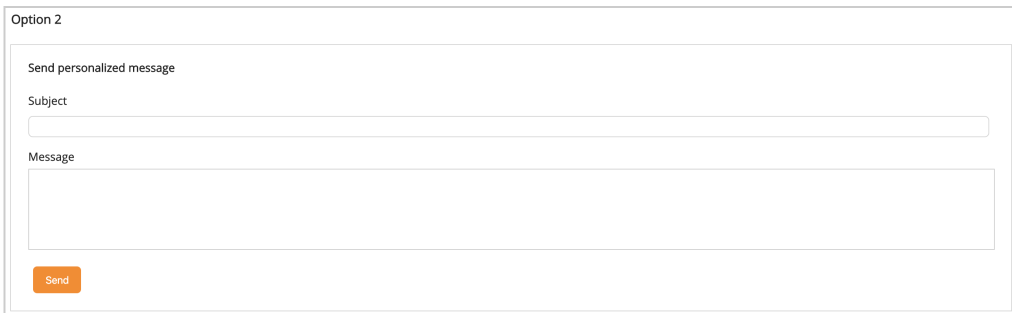
Send Notifications. Emails can be sent to one or more user groups.



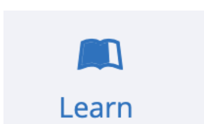
Option 1 - Send a pre-written message using an email template to inform users that the agenda or minutes are ready.



Option 2 - Send a custom email.



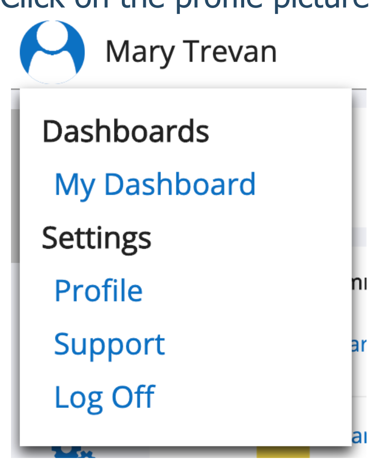
Learn more about how to use BoardSpace



Understanding the features in the drop-down menu

Profile Picture

Click on the profile picture or icon to access additional features.



My Dashboard

My dashboard is an overview page for directors who serve on more than one board or committee.

It includes a list of boards, an overview of outstanding actions and a list of planned events.

Profile

In profile, a photo can be added, contact information updated or a language profile set.

Support

Support can be accessed in two ways:

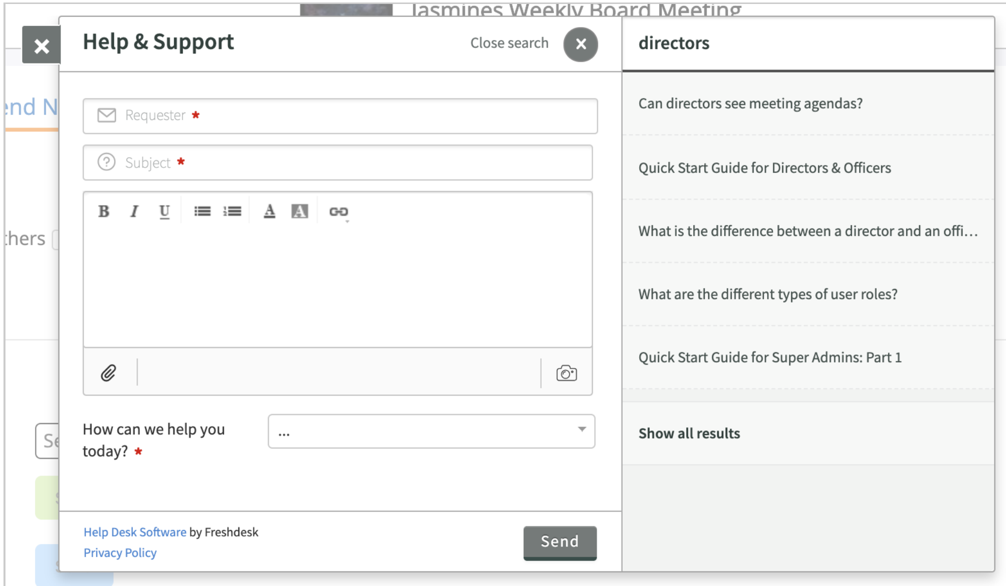
1 - In the drop-down menu under Support .

2 - Via the Support on every page at the top right. .

Clicking on the Support button results in a popup form for submitting a support ticket.

Before sending a support ticket, search for the answer in "Search Articles." Many answers to questions are available.

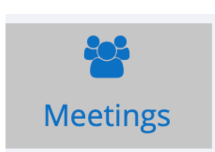
If the answer in not available, submit a ticket. Be as specific as possible and use the camera icon in the lower right-hand side to take a screenshot.



	**The bell** opens a panel that provides updates and notices regarding the app. The bell turns red when new information is added.

	**Board Information** includes a list of directors and managers along with their contact

Meetings

Go to meetings 

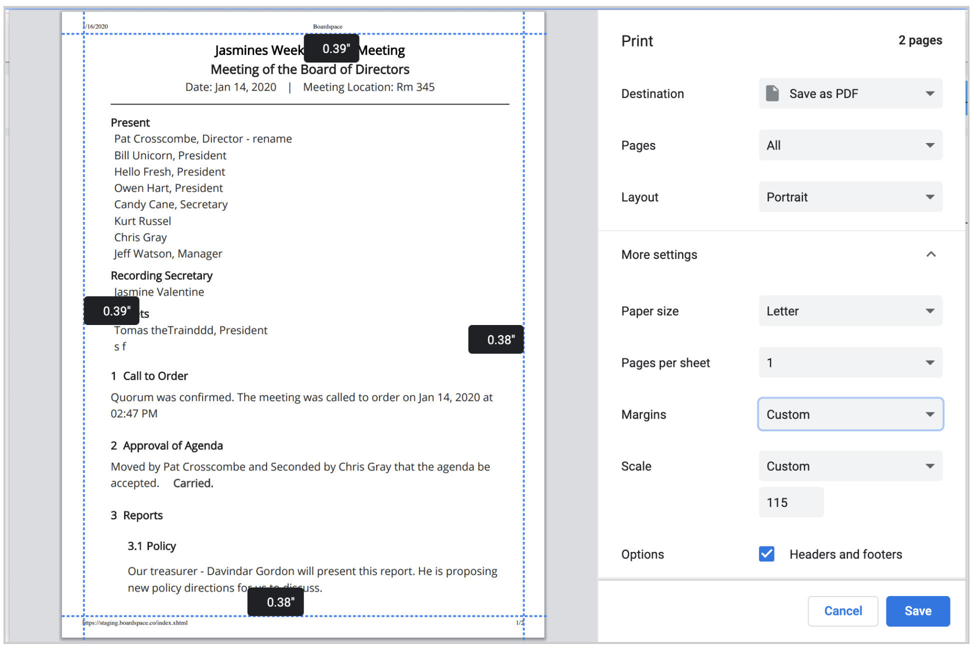
Click on Smart Minutes for one of the meetings.

Comments can be viewed by clicking on the . Add comments by clicking on the New Comment button. Comments can be seen by all of the directors and managers. Reply to a comment by clicking on the button. Add private details in Notes (no one can see notes).

Attachments for a meeting can be found by clicking on Attachments . On the left-hand side, there is a list of documents and on the right-hand side, the documents are organized by agenda item.

Print a document by clicking on the Print button. A new browser tab opens. Print the document or save it as a PDF.

Use "more settings" to set the margins and the scale. Increasing the scale increases the font size.



Can I edit a document in BoardSpace?

Created by Pat Crosscombe, Modified on Tue, 14 Jun 2022 at 01:17 PM by Pat Crosscombe

A Google Document can be edited via a link added to a specific meeting. It is not quite being able to edit in BoardSpace but adding the link does make it easier for users to find the right document and make edits that everyone can see.

Each person who makes edits must be enabled in Google Docs to be able to edit that document. This can be done by creating the document and then sharing a link to the document as directed by the arrow. The link can be added after the meeting has been created (Diagram 1) or when the meeting is first created (Diagram 2)

Diagram 1

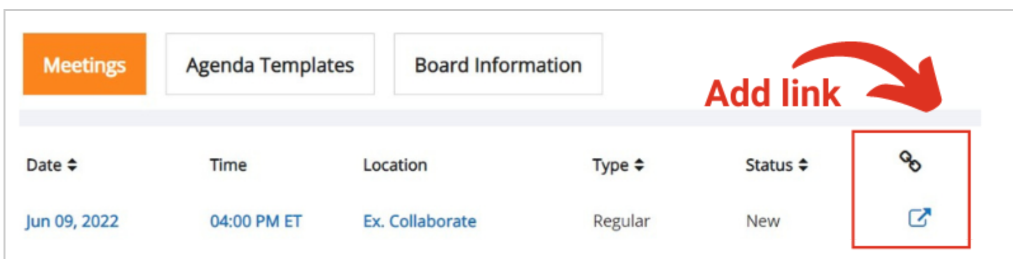
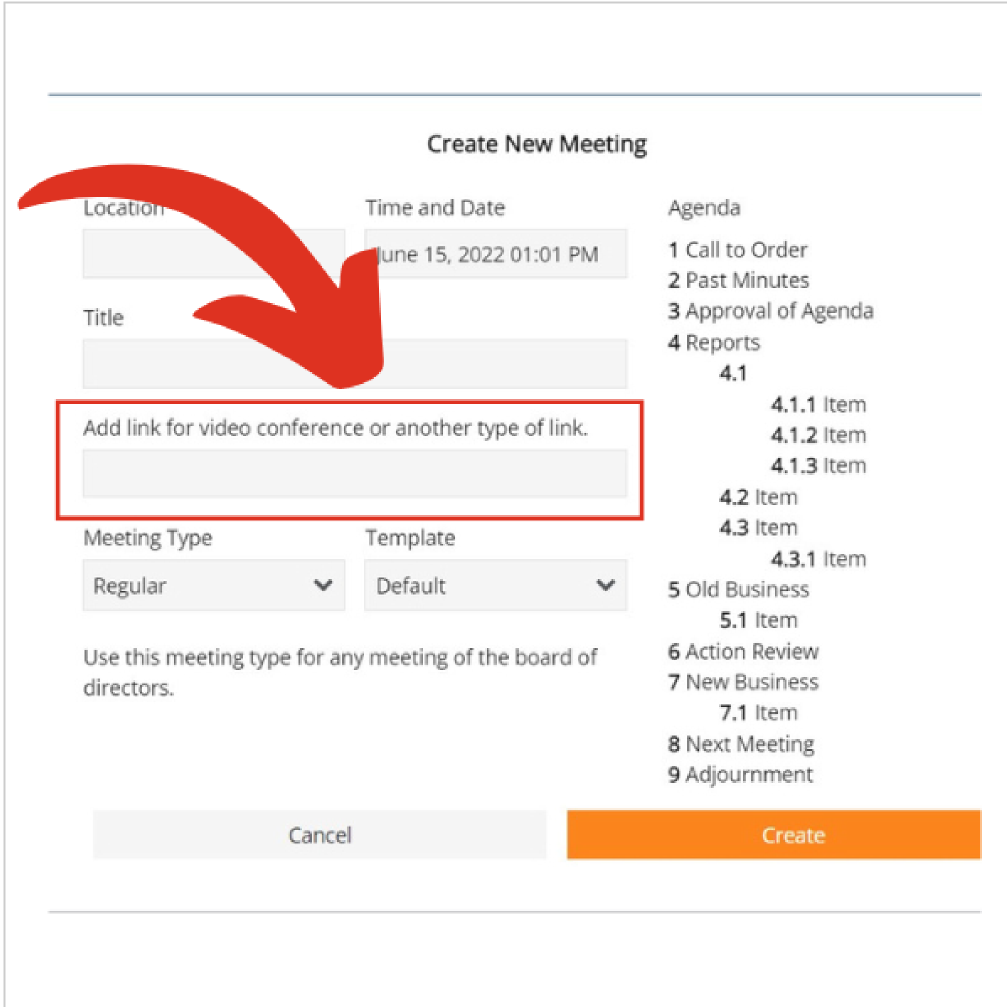


Diagram 2



The challenge with using Google Docs is to make sure that users have access to a Google drive or they won't be able to edit the document.

Can I use BoardSpace on my phone?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 11:54 AM by Pat Crosscombe

Absolutely!!!

It's super easy to use BoardSpace on your phone.

Open the browser you normally use such as Chrome or Firefox.
Go to
https://app.boardspace.co

Log in using the same password you use to login on your desktop.

BoardSpace automatically detects that you are on a phone or small tablet and shows you the mobile version of the application.

Have fun!

Updated October 2023

Can owners see events and actions?

Created by Pat Crosscombe, Modified on Fri, 28 Jun 2019 at 11:22 AM by Pat Crosscombe

No.

Can the Board see the minutes as I type them (in real time)?

Created by Pat Crosscombe, Modified on Mon, 13 Jan 2020 at 11:42 AM by Jasmine Vary

Yes, BoardSpace uses live updates to show you real-time data.

Can you give me a new password?

Created by Pat Crosscombe, Modified on Mon, 11 Nov 2019 at 09:20 AM by Jasmine Vary

I've tried to change my password by clicking on the Request New Password Link but it doesn't seem to be working. Can you give me a new password?

No, we can't give you new passwords.

There are several options to check.

Option 1
Check-in spam. Sometimes these emails get sent to spam. Make sure to white label our emails to ensure that they get delivered to your inbox.

Option 2
Wait a bit. Sometimes email providers are slow in delivering emails to your inbox.

Option 3
If you made a mistake with your email address - the email is never going to get to you. Make a second reset request and check carefully the address that you entered. We do not tell you if the address you entered is a part of BoardSpace because that would be providing too much information to hackers who have bad intentions towards BoardSpace. We tell you what address the reset request is sent to but not if the address is valid in our system.

Lastly, sometimes your service provider blocks our emails so if after trying the above, let us know and we can track down and see if your service provider is doing the blocking.

Can a person have more than one position?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 12:00 PM by Pat Crosscombe

(Click on an image to enlarge it.)

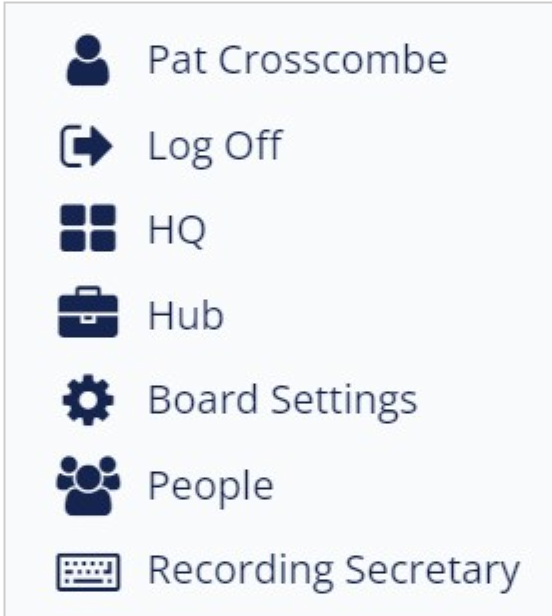
Could a board member also be a member of a committee? Yes. Is there a limit to the number of committees that a user can belong to? There is no limit.

Additional Information
You must have admin privileges to view this page and add, remove or edit people.
People can be on the board and any number of committees.

Each person could have different position on each board and committee. For example, on the board they are a director, on committee A they are the recording secretary, and on committee B they are a member.

To assign more than one position to a person follow these steps:

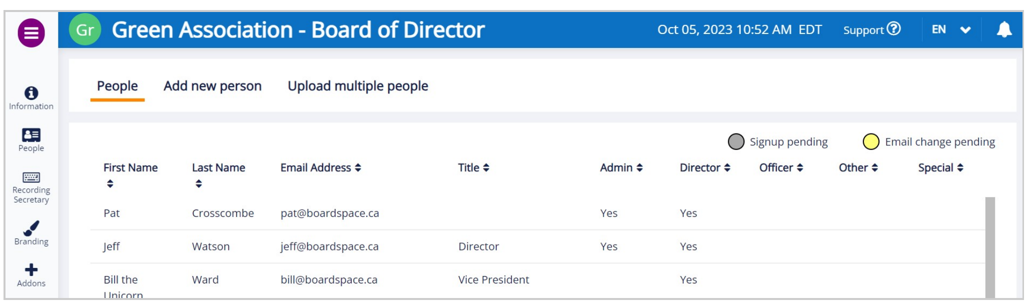
Step 1
Go to Board Settings (Found at the top left of screen - it will be a photo or an icon)



Step 2
Click on the People from the drop-down menu

Step 3

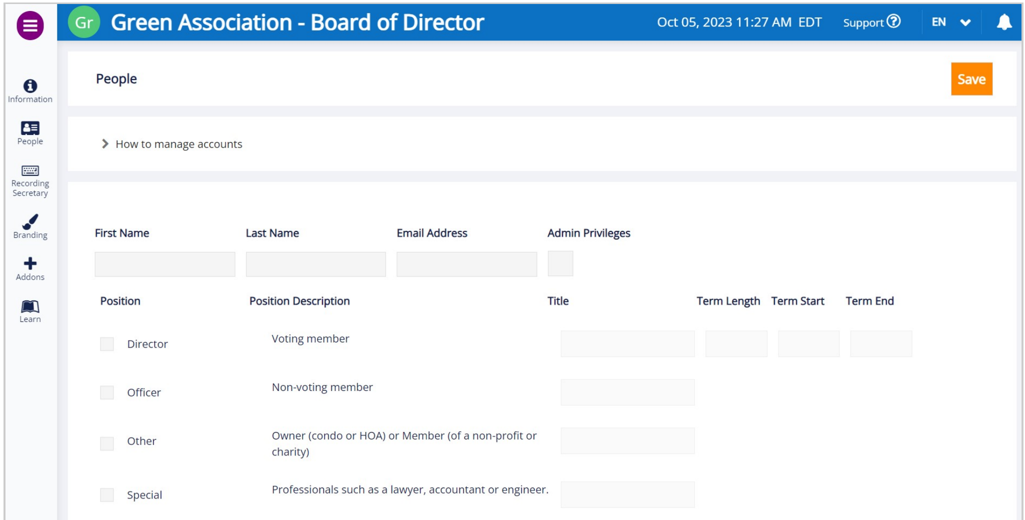
To edit a person's postion, click on the row.



Step 4

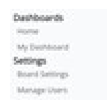
A new view opens with details about a person. Note - the last login date and status. If the status is Active - that means that the person has logged in and created their account.

Additional Positions can be assigned to a person by checking the check box.



Updated on Feb 13, 2023

Attachments (1)



Screenshot 2....jpg
19.3 KB

Can directors see meeting agendas?

Created by Pat Crosscombe, Modified on Mon, 13 Jan 2020 at 11:42 AM by Jasmine Vary

Directors have access to meeting agendas, etc any time when they log in.

Can documents be quarantined from certain members?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 11:58 AM by Pat Crosscombe

I need to be able to keep human resource documents for certain eyes only.

Documents can be quarantined from others. In this example, I would suggest creating an HR committee and saving related documents in the committee space.

The choice of super admin is important because the person in this role has access to the board and all committees.

Reviewed October 2023

Can documents be renamed in the Document List or after they have been attached to a meeting?

Created by Pat Crosscombe, Modified on Tue, 14 Jun 2022 at 12:54 PM by Pat Crosscombe

Documents can be renamed at any time - on upload, after upload and after they have been added to a specific meeting.

Option 1
On upload - you can edit the doc name - just put your cursor in the input field and change the name.

Option 2
In the documents list - there is a small pencil icon beside each document's name.
Click on the pencil icon. and edit away. If the document has been attached to a meeting - the name will update.

Place your cursor in the box and made the change to the name. Click the check icon to save the name change.

* The document name will be updated everywhere in BoardSpace. This change does not affect the original document that is on your local computer.

Can I change the formatting of the agenda and minutes when printing or saving as a pdf?

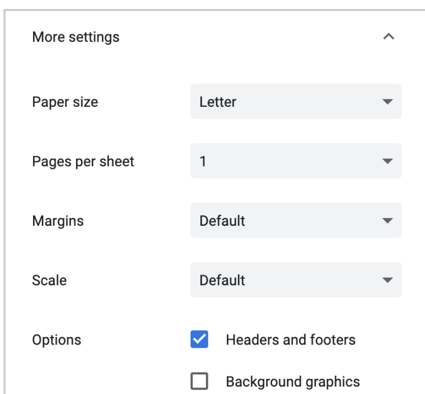
Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 11:58 AM by Pat Crosscombe

Yes, you can change the appearance of the agenda and the minutes.

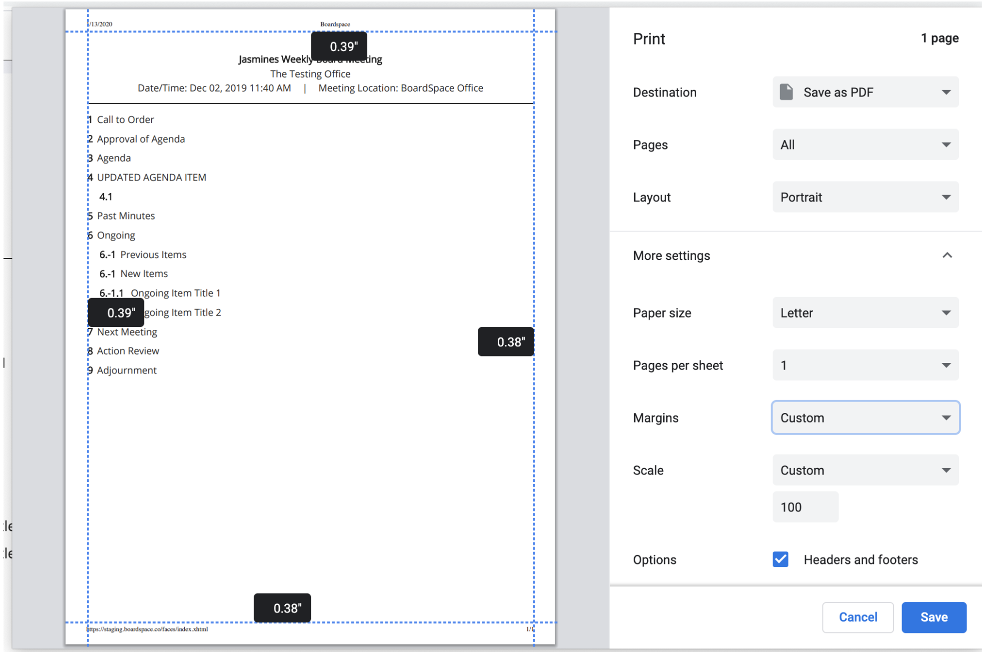
These instructions are for Chrome users.

Step 1
Click on the print button

Step 2
On the left-hand side menu (right side if Mac user) - click on More settings.

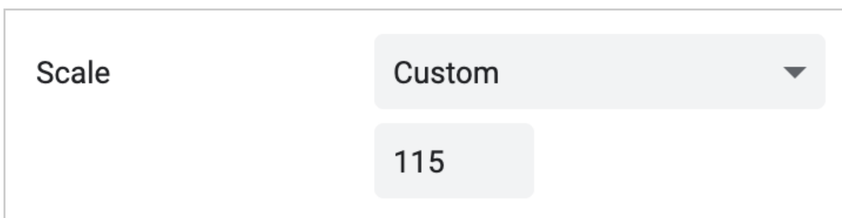


Margins
You can customize the top, bottom and side margins to whatever size you need by selecting Custom from the dropdown for Margins.



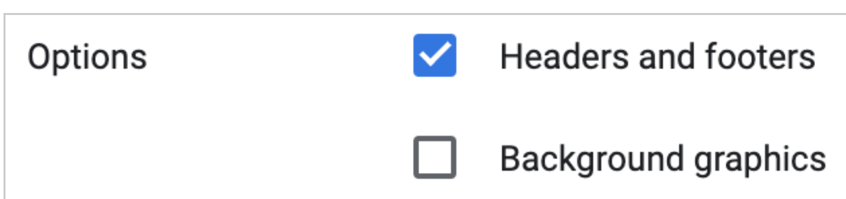
Scale

Text size can be increased by increasing the scale. Generally speaking a scale of 110 to 125 will result in an optimal text size.



Headers and Footers

There is an item called Options at the end of the More settings list. Uncheck Headers and footers to remove (also make sure that background graphics is not checked).



Reviewed October 2023

Can I create two meeting dates at the same time and date?

Created by Jasmine Vary, Modified on Tue, 12 Nov 2019 at 11:23 AM by Jasmine Vary

No, you cannot create two meetings at the same time and on the same date.

Do you have suggestions as to how we should organize our documents?

Created by Pat Crosscombe, Modified on Fri, 05 Feb 2021 at 05:09 PM by Pat Crosscombe

A library of initial tags is added for each type of organization. You will want to refine this list to meet the organization's specific needs.

Additional Tags

I suggest some very general tags, and then very specific that refine the general tags.

Financial Statements is an example of a general tag.

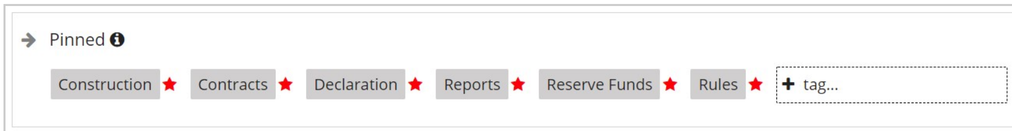
Then create Annual Monthly Budgets as more specific tags.

Adding a date or fiscal year tag could be very useful when adding previous documents. Documents can be search by date - the date refers to the date the document was uploaded so this search is not useful for previous documents that are uploaded in bulk on the same date.

This is one example only; there are many additional ways of organizing tags.

Pinned Tags

Created by Pat Crosscombe, Modified on Tue, 09 Jun 2020 at 02:45 PM by Pat Crosscombe



What are pinned Tags?

Pinned tags give users the opportunity to create a personal frequently accesses tag system.

How to use it?
Go to documents

Go to Pinned

Drag tags from tags to pinned.

Pinned tags can be removed by clicking on red star.

Remember!

Pinned tags are created by each user. The overall tagging system is created by board admins.s

Getting ready for a meeting

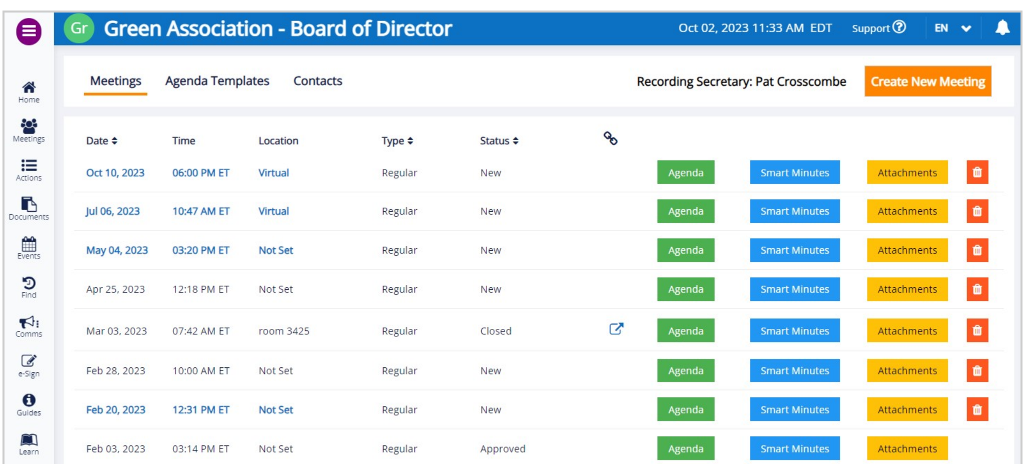
Created by Pat Crosscombe, Modified on Wed, 18 Oct 2023 at 04:45 PM by Pat Crosscombe

Lesson Overview:

In this lesson, we'll walk you through:

- Setting up a meeting for a specific date and time
- Crafting the agenda
- Drafting and recording minutes
- Finalizing and approving the minutes

Note: Only a recording secretary can prepare and edit the minutes. You'll know you're the recording secretary if you see your name and the Create New Meeting button.



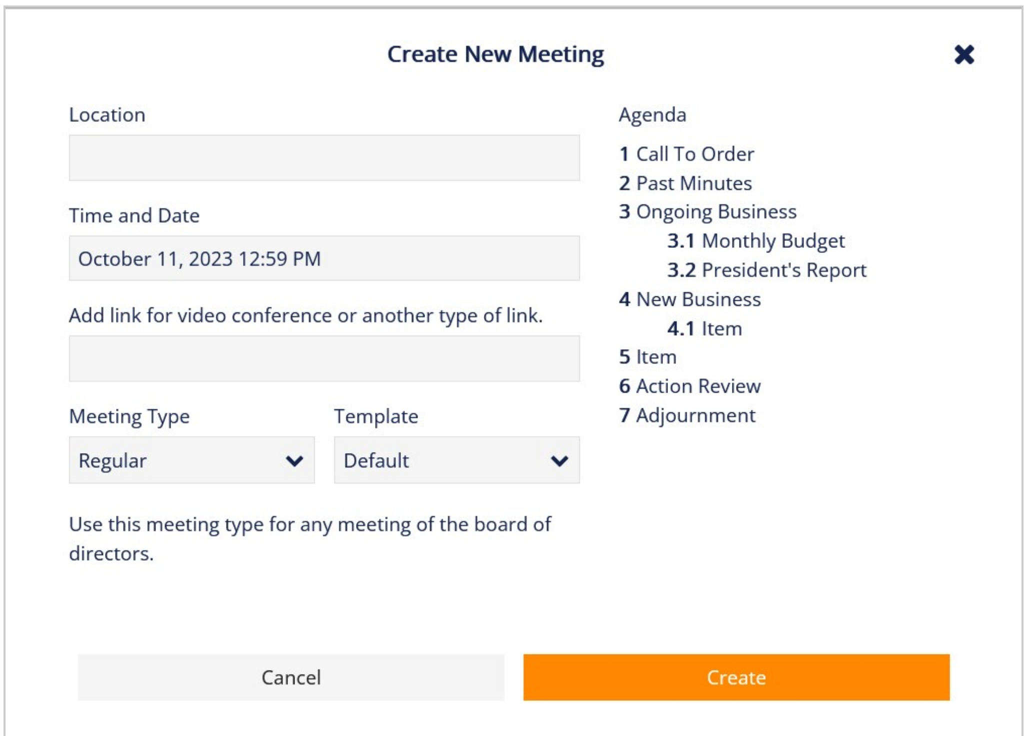
(click on the image to enlarge)

1. Setting up a New Meeting

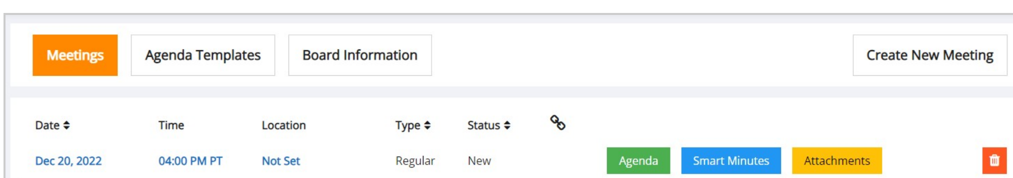
Click on **"Create New Meeting"** button.

- A popup will appear prompting you to enter meeting details:

- Specify the location, date, and time.
- (Optional) Add a link for a video call.
- From the drop-down menu, pick a meeting type.
- Select an agenda template. The chosen template's agenda will display on the right.



Click **Create**. A new entry resembling the one below will be generated.



2. Crafting the Agenda

- Upon creating a meeting, the chosen agenda template instantly becomes the draft agenda. If you don't select a specific template, the default one will be applied

- Customize the template to tailor it for your meeting.

For more details on managing the agenda, check out the following articles:

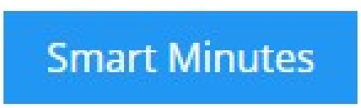
How to use the agenda builder

How to Create an Agenda Template

What are the different types of agenda Items?

How to Create an Agenda Template

3. Delving into the Minutes

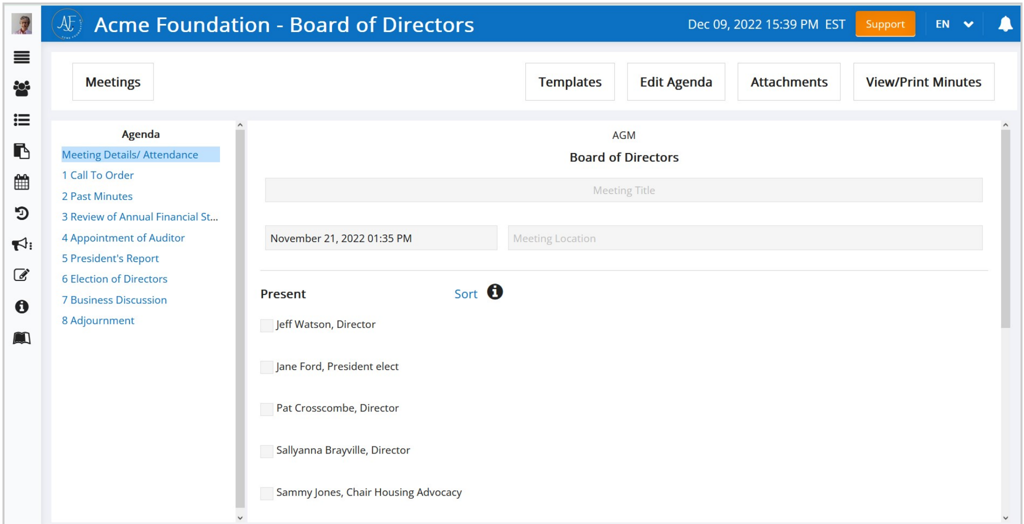


- Draft minutes are auto-generated when a meeting is initiated.

- If you're the recording secretary, you'll see an editable view.

- The agenda will be displayed in the left column, with each agenda item as a clickable link.

- Attendees, such as directors and staff, are auto-added. Handy features like checkboxes next to names are available for tracking attendance.

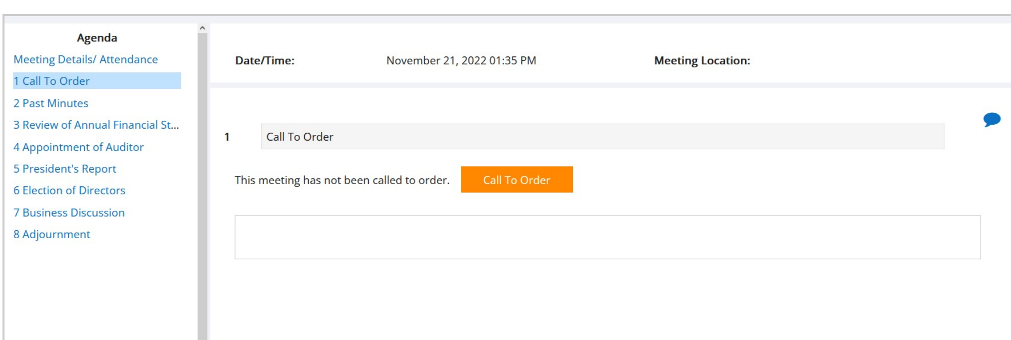


Agenda items act as jump links; click one to jump directly to its section.

To add non-regular attendees like auditors, type their name and hit **Add Attendee**.

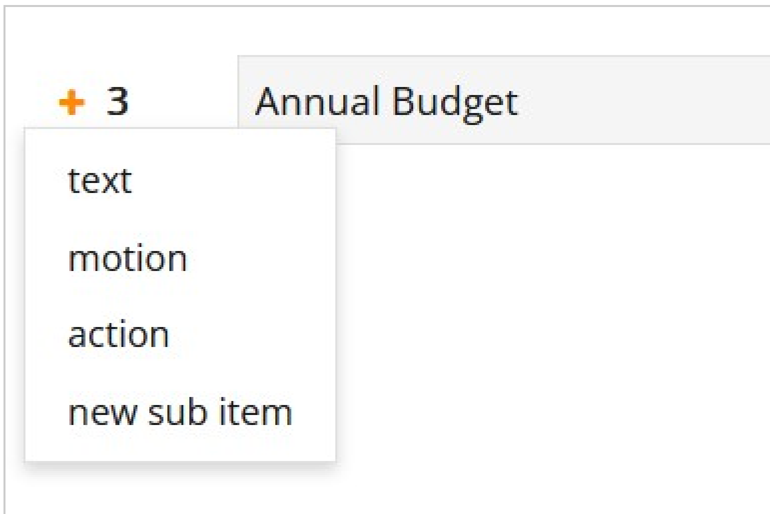
Click **Call to Order** to commence the meeting, but only do this once the meeting begins. You can also add comments in the provided textbox.

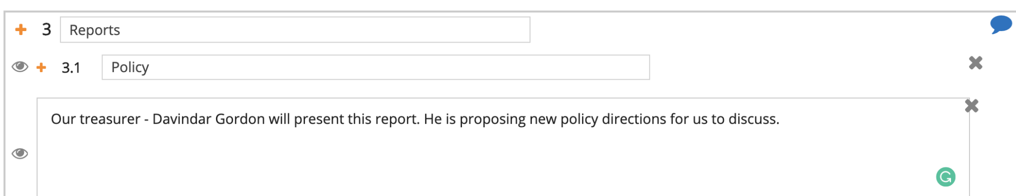
Use the orange **+** icon to add text boxes, motions, or actions to agenda items pre-meeting.



As you progress through the agenda:

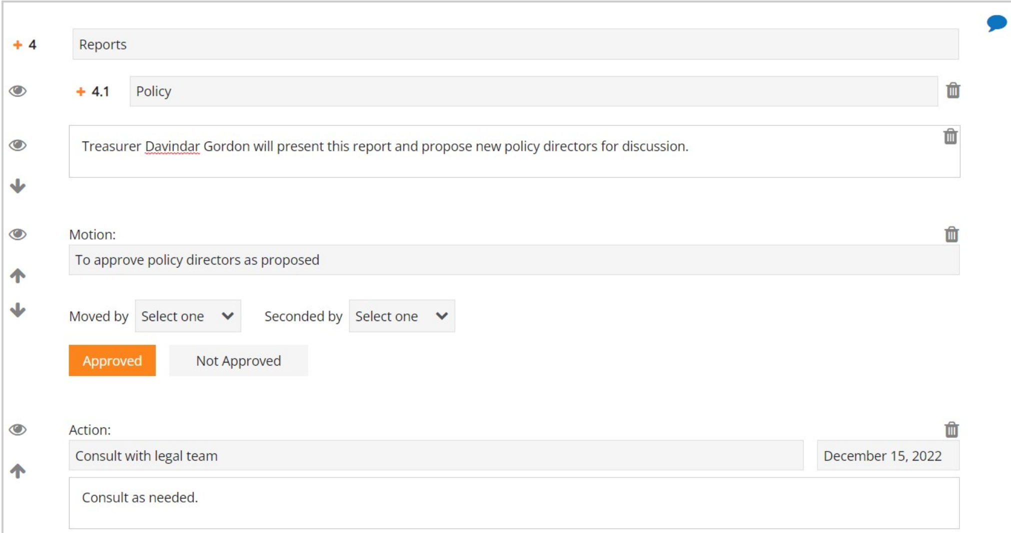
- Add text boxes, motions, actions to agenda items before the meeting starts. Click on the orange + to access dropdown.





- Input notes into the text boxes as necessary.

- Draft motions (these can be adjusted mid-meeting).

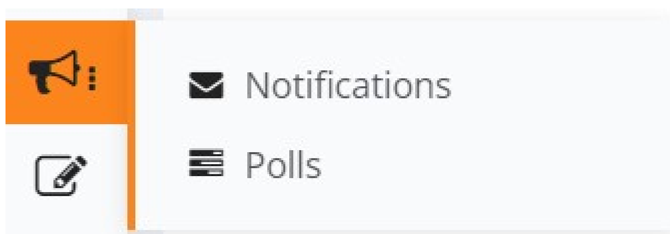


Once everything's set:

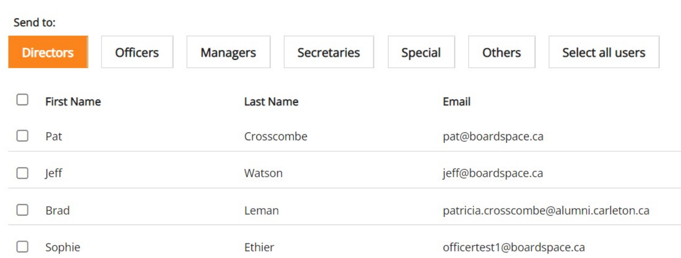
Notify the board that the meeting agenda is ready.

How to send a notification

Click on



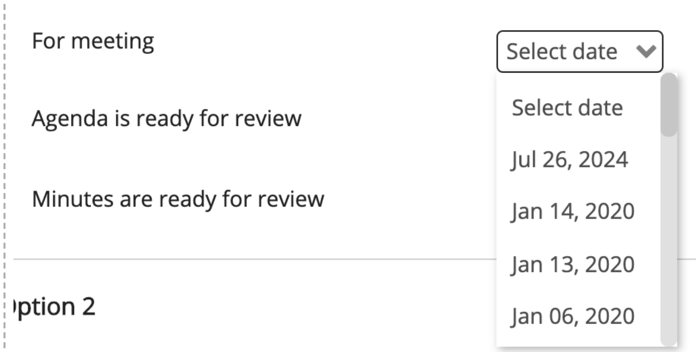
Select user role and select all or check beside names.

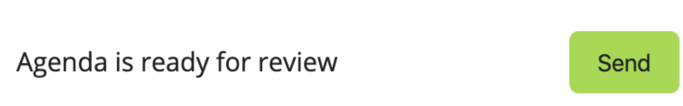
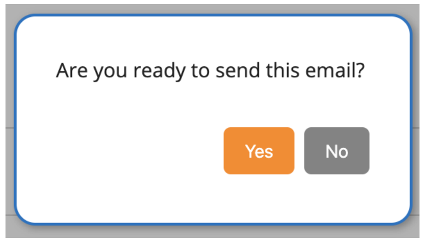
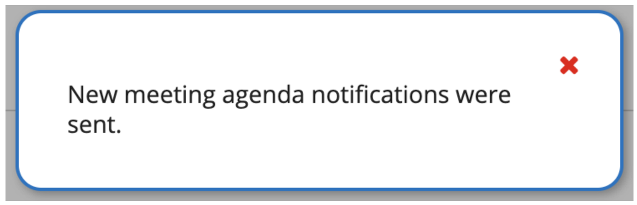
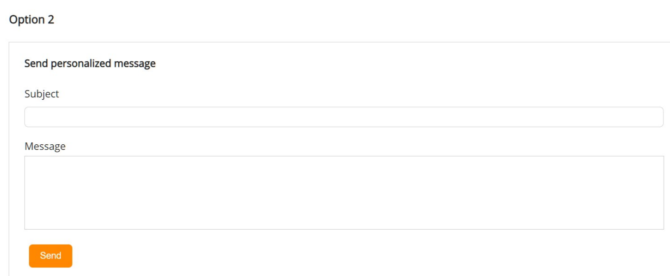


Go to Option 1

Sends a pre-written email.

Select meeting date from the dropdown.



Click on send - reminder gets sent.	
Click yes. A notification has been sent indicating that the meeting agenda is ready.	 
Option 2 Allows a custom email to be sent.	

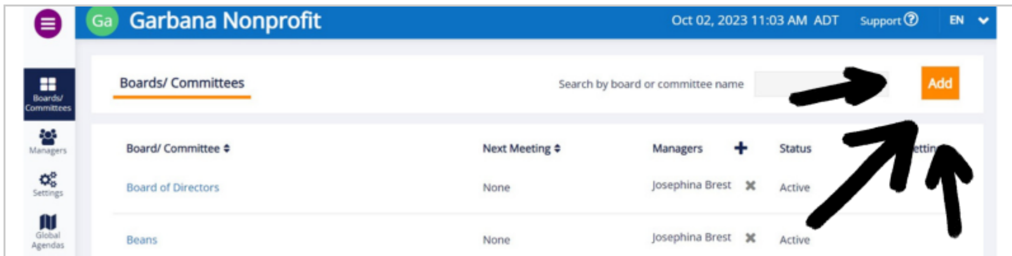
Updated October 2023

Getting Started Guide for Super Admins

Created by Pat Crosscombe, Modified on Wed, 18 Oct 2023 at 04:08 PM by Pat Crosscombe

After setting up their account, Super Admins can log in and start setting up their BoardSpace.

1. Click on ADD



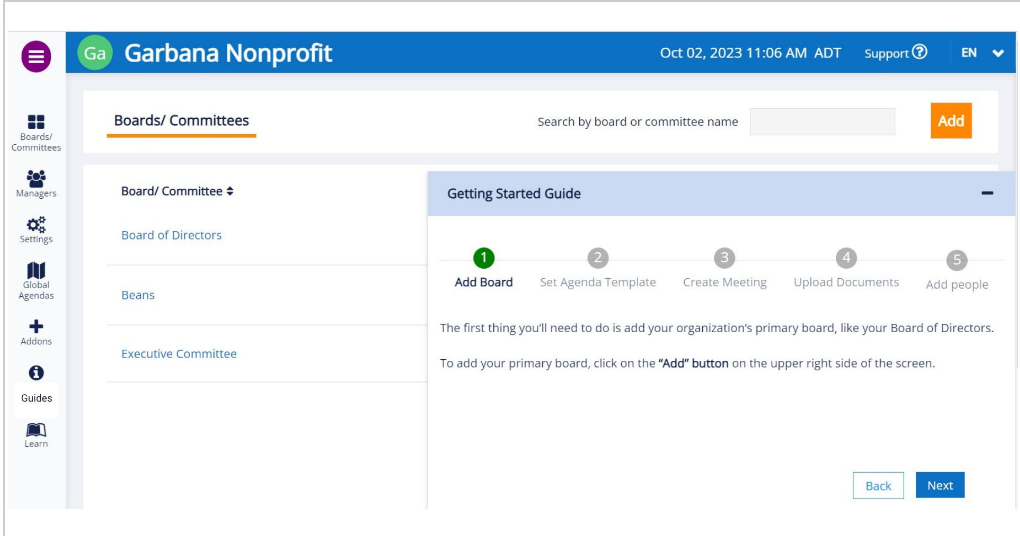
2. A Getting Started Guide opens.

Follow the steps and information outlined in the Getting Started Guide

Collapse the Guide by clicking on the **-** (at the top right-hand side of the guide panel).

Guides can be dragged to a different location on your page and closed or opened at any time.

It is not necessary to complete all the steps at one time. You can come back any time. Once you click Done, the popup goes away but it can be brought back by clicking on Guides - left-hand side menu item.



Created October 2023 (Link to Guide & Support)

Getting Starting using BoardSpace

Created by Pat Crosscombe, Modified on Thu, 19 Oct 2023 at 09:23 AM by Pat Crosscombe

Congratulations on taking the first steps toward digital freedom. Team BoardSpace is excited to welcome you to our board management software portal. We look forward to working with you and will be with you at every stage of the journey.

Before getting started there are a few things we'd like you to know about BoardSpace.

Where to use BoardSpace

BoardSpace can be used on your desktop, laptop, tablet or smartphone (always make sure the operating system is up-to-date) and is accessed via a browser, such as Chrome or Firefox.

There is nothing to download.

From your desktop, tablet or smart phone log in via this link **https://app.boardspace.co**

Setting up your account

New users need to create a password before being able to log in. Each new user will receive an email with a link to set up their account password. Passwords must be at least 8 characters and include at least one capital letter, one number, and one special character.

Password rules are enforced to ensure security. After the password is set, a confirmation email follows to confirm.

After your account and password have been created, you can choose to log in by email.
Click on the button "Log in with email." An email containing a link will be sent.
Updated October 2023

How can I make certain tags private?

Created by Pat Crosscombe, Modified on Mon, 20 Mar 2023 at 07:37 AM by Pat Crosscombe

You can't make a tag private, but you can add either the "Board" or "Board & Managers" (the tags with the padlock icon) tag to any document and it will be private.

How can I read pdf documents?

Created by Pat Crosscombe, Modified on Mon, 11 Nov 2019 at 09:43 AM by Jasmine Vary

Step 1
Go to Chrome Webstore (this only works for Windows)
https://chrome.google.com/webstore/category/extensions

Step 2
Click on extensions

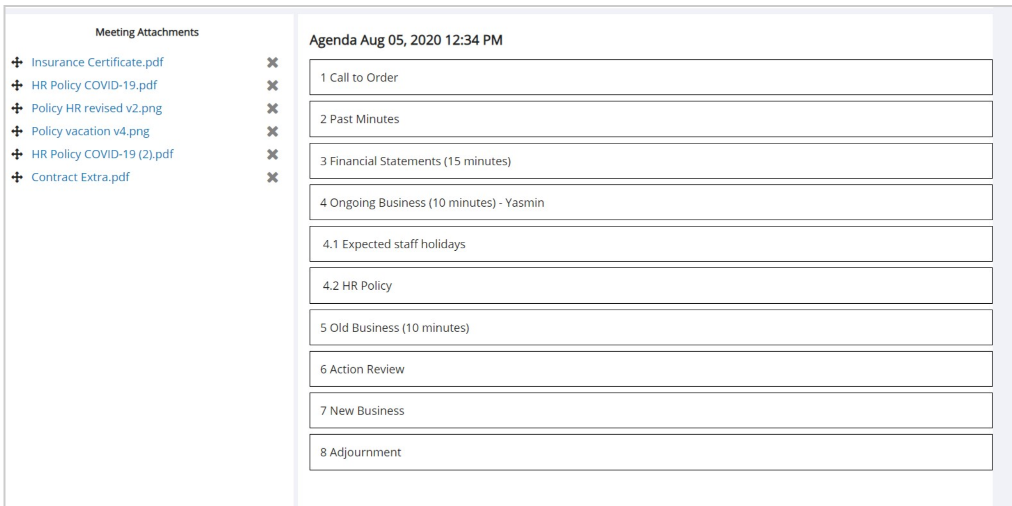
Step 3
Search for Adobe Acrobat

In order to use this extension you need to have Adobe Acrobat DC/Adobe Acrobat XI (11.0.09 or higher) installed on your computer.

How can I re-order the attachments for a meeting

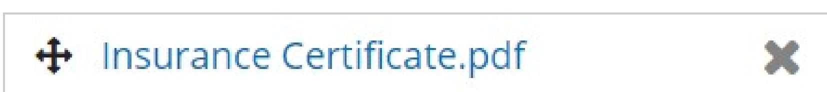
Created by Pat Crosscombe, Modified on Wed, 12 Aug 2020 at 10:49 AM by Pat Crosscombe

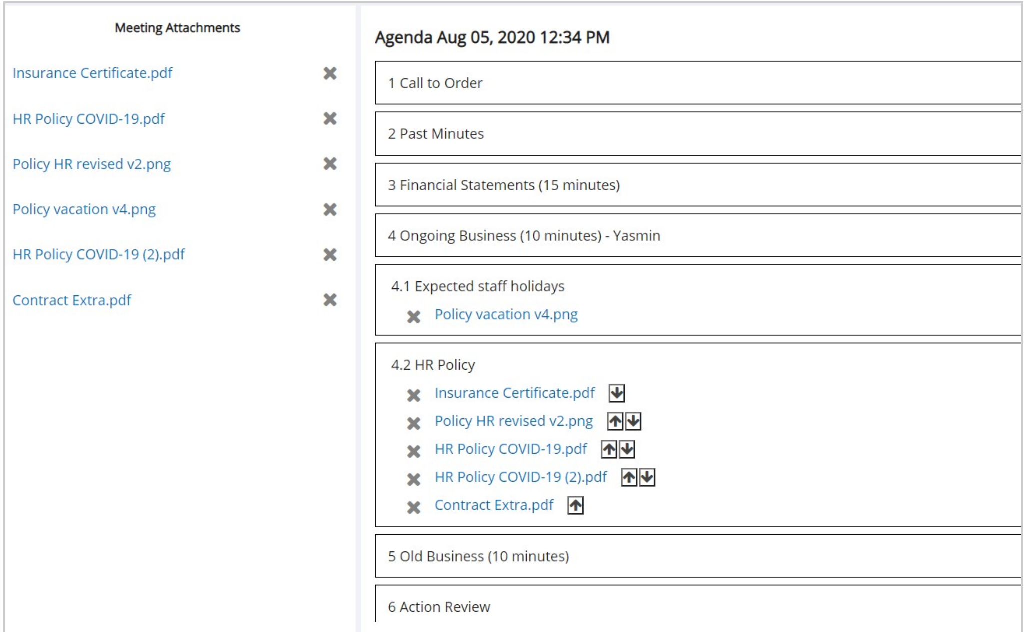
I am trying to re-order these attachments within a meeting but they do not move.



You can't reorder the documents on the left-hand side, but the documents can be organized by agenda item.

To move the document, place your cursor on the icon at the left-hand side of the document name. Drag to the right and dropping in an agenda item.





If the doc has been dropped in the wrong agenda item, remove the doc (click on the x to its right) – it goes back to the docs on the left-hand side. Then drag it to a new item. Documents that are deleted from attachments remain in the main document section.

How can I use a spell checker while using BoardSpace

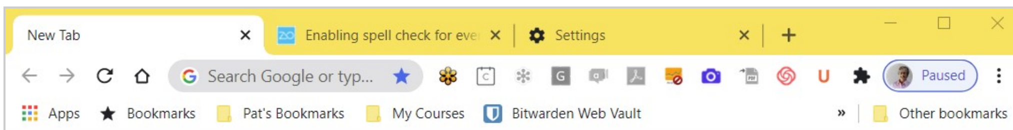
Created by Pat Crosscombe, Modified on Tue, 25 Aug 2020 at 12:28 PM by Pat Crosscombe

The first step is to make sure that spell check is enable in your browser.

Step 1: Enable spell check in Chrome or Firefox

Chrome

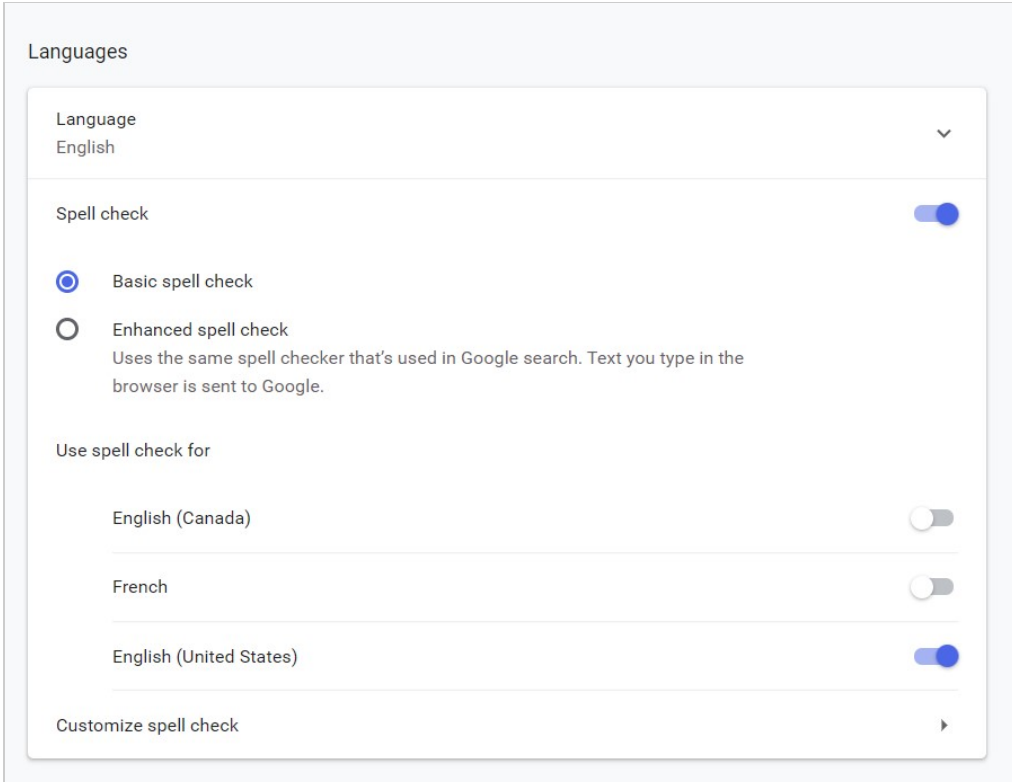
Go to Chrome's Settings - the 3 dots at the top right-hand side



Scroll down to Advanced

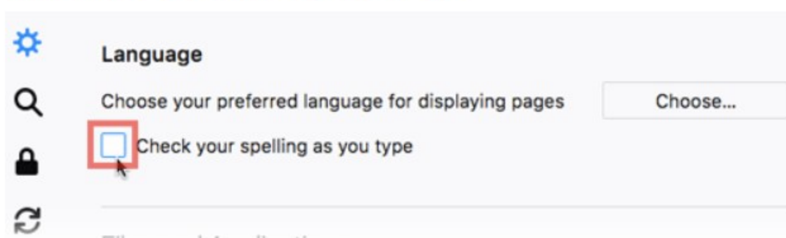
Languages

Choose desired options and language.



Firefox

1. Click the menu button ☰ and select Options.
2. In the General panel, go to the **Language** section.
3. Uncheck **Check your spelling as you type**.



Step 2: Set up a Grammarly account

Add Grammarly

There are free and paid plans available.

How can we keep some documents confidential?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 09:00 AM by Pat Crosscombe

We have some documents that we don't want our owners or members to be able to view.

Add Private Tags to documents.

Board & Mgrs only - use to prevent owners/members from viewing certain documents

Board Only - used to prevent managers and owners/members from viewing certain documents.

Reviewed Updated October 2023

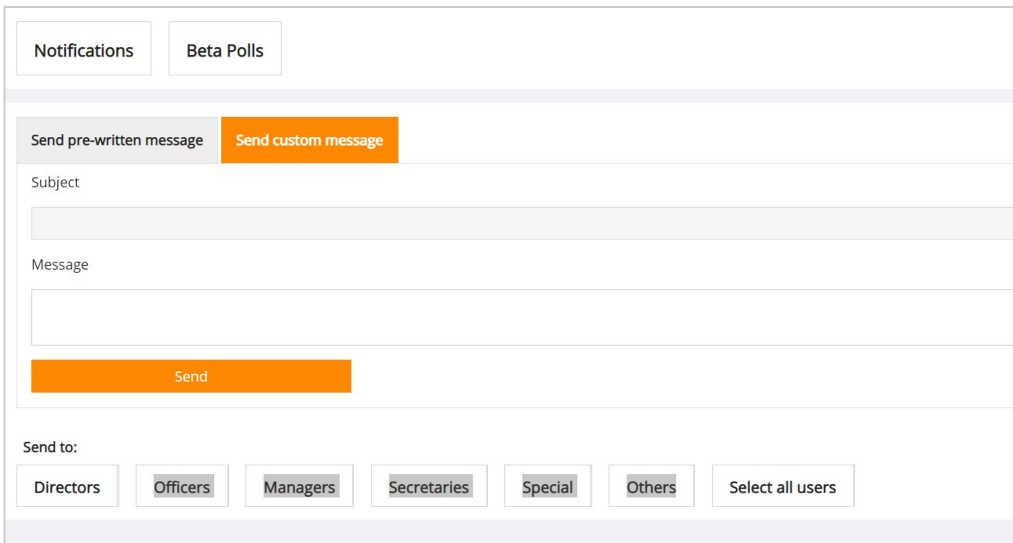
How do I add a link to a notification?

Created by Pat Crosscombe, Modified on Wed, 10 Mar 2021 at 03:06 PM by Pat Crosscombe

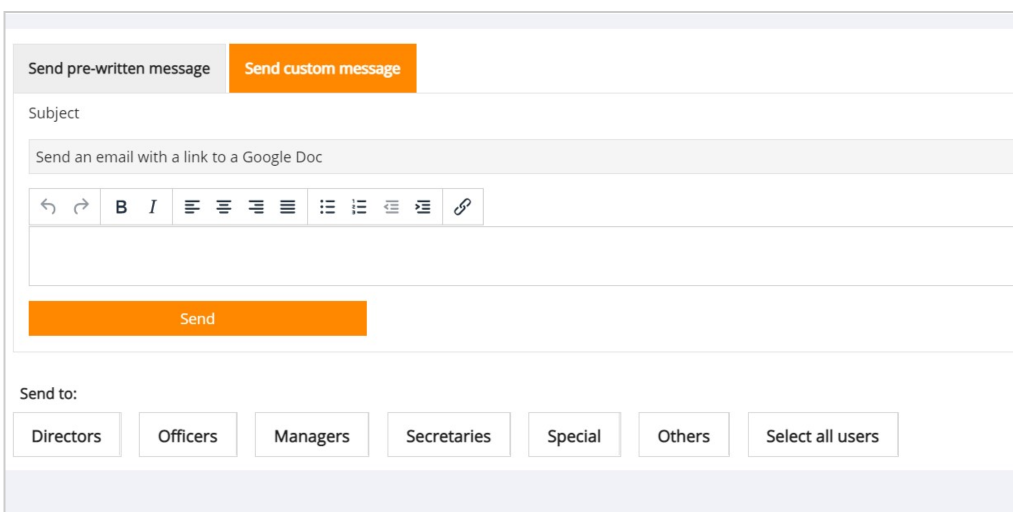
1. Go to Comms

2. Click on Send Notification

3. Select "Send custom notification."



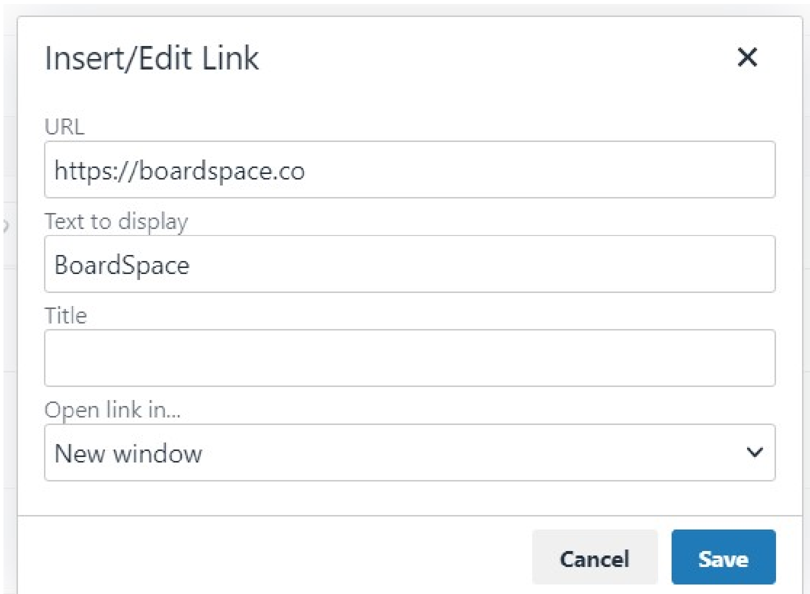
4. If you add text in the Message section, a toolbar shows that allows text to be styled.



5.

	Click on this icon at the right-hand side of the toolbar.

6. A popup opens that allows for a link to be added in the message section.



How do I add a new director to my board?

Created by Pat Crosscombe, Modified on Mon, 13 Jan 2020 at 11:32 AM by Jasmine Vary

See How do I add Members?

How do I add people to our account?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 11:30 AM by Pat Crosscombe

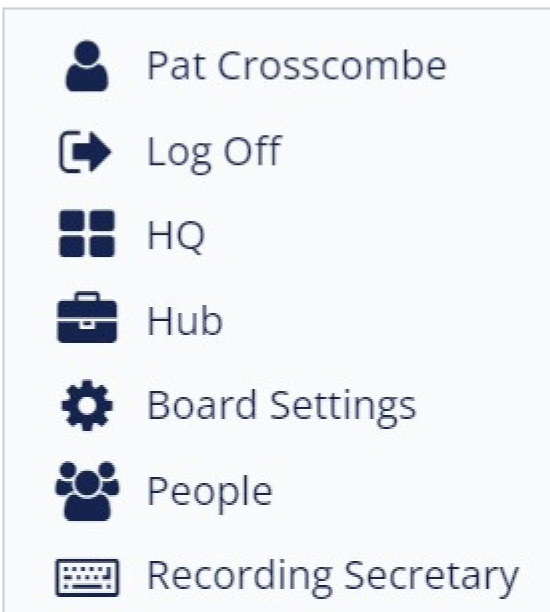
People can be added without an email address.

Step 1
Go to your board

Step 2

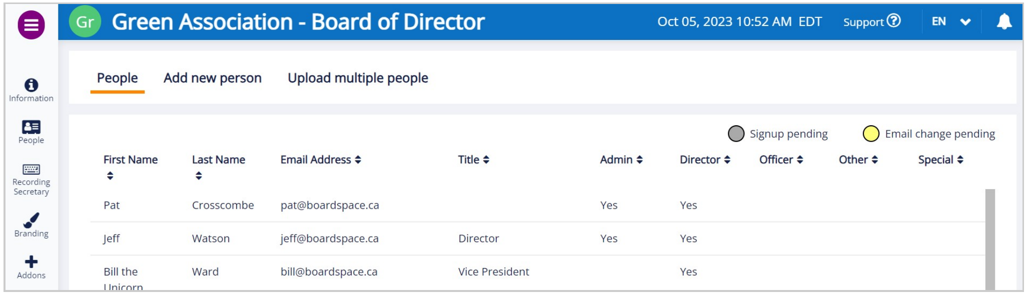
	Click on icon located at top left-hand side.

The drop down shows. Click on People



Step 3

Go to **People**



After this step, you have two options. You can import people individually or do a bulk upload:

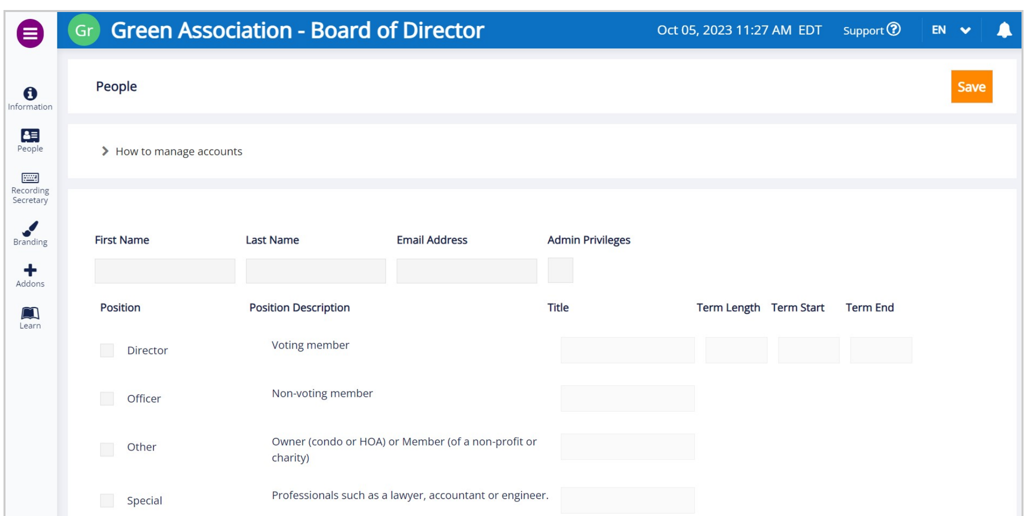
Option A: Add people individually

Click on "Add new person"

Add First Name, Last Name & Email Address (can be left blank and updated later. People without email addresses cannot access the system)

Check beside a position. Add a title. Add term (optional). Adding a term does NOT change a directors history in BoardSpace.

Account setup emails will be sent if they have an email address.



Option B: Bulk Upload

Click on **Add Multiple People**

Import the CSV file you created as listed in this article and follow the instructions on: How to Add Multiple People

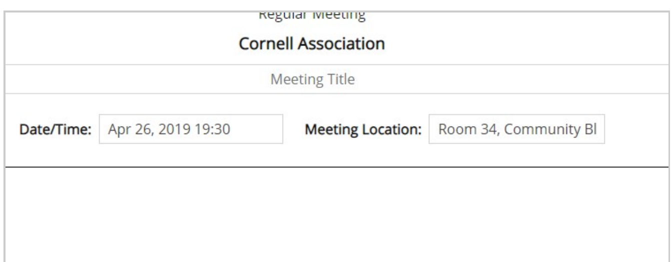
Updated October 2023

How do I change a meeting date? remove

Created by Pat Crosscombe, Modified on Thu, 18 Feb 2021 at 11:43 AM by Pat Crosscombe

Step 1

Click on the SMART Minutes button for the meeting date you want to change.

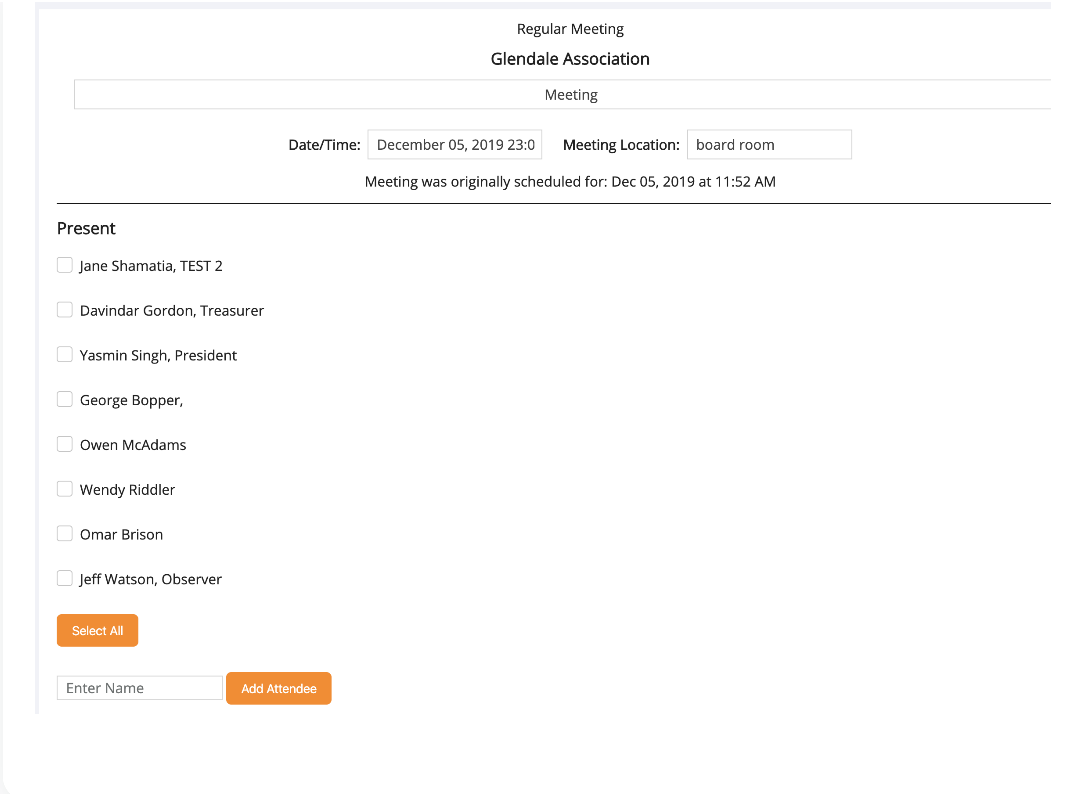


Step 2

You must be the Recording Secretary to make this type of change.

Step 3

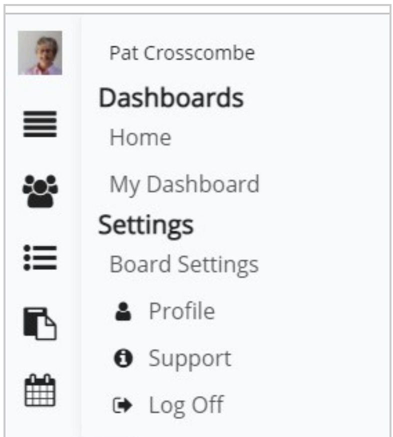
Click in the input field for Date/Time. You will get a popup calendar - you can change the date by clicking on one of the days.


Regular Meeting
Glendale Association
Meeting
Date/Time: December 05, 2019 23:0
Meeting Location: board room
Meeting was originally scheduled for: Dec 05, 2019 at 11:52 AM
Present
Jane Shamatia, TEST 2
Davindar Gordon, Treasurer
Yasmin Singh, President
George Bopper,
Owen McAdams
Wendy Riddler
Omar Brison
Jeff Watson, Observer
Select All
Enter Name
Add Attendee

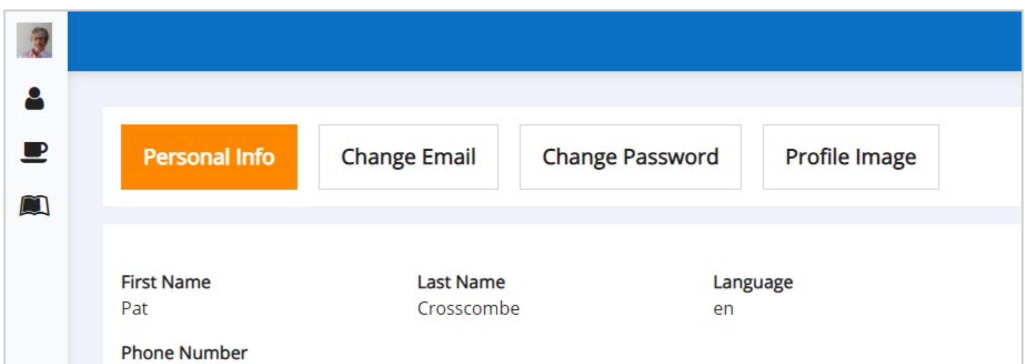
How do I change my email address?

Created by Pat Crosscombe, Modified on Thu, 18 Feb 2021 at 11:22 AM by Pat Crosscombe

Go to your Profile - this is a dropdown menu accessed from the top left-hand side. It will be a photo of you or an icon.



Click on Profile



Click on Change Email

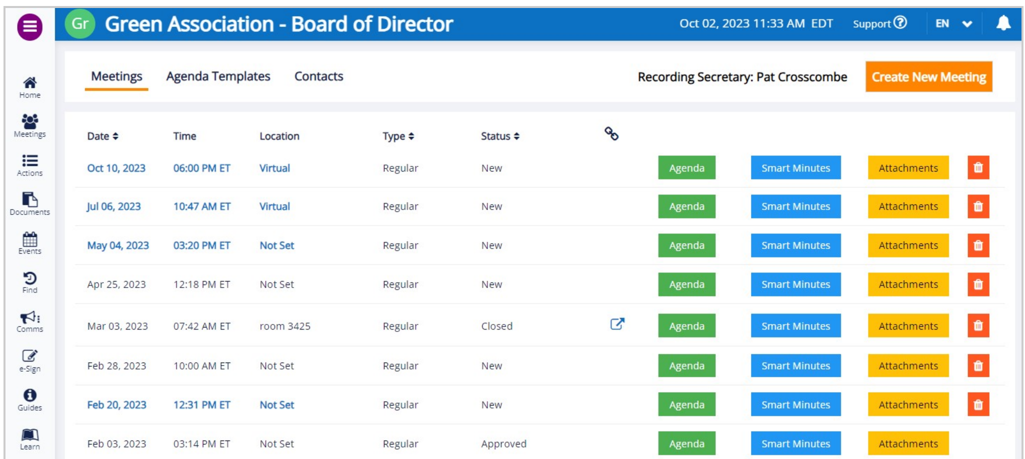
Add your new email address.

How do I change the meeting date or time without losing the agenda?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 12:09 PM by Pat Crosscombe

The meeting date and/or time can be changed from two places

Go to the Meetings Page

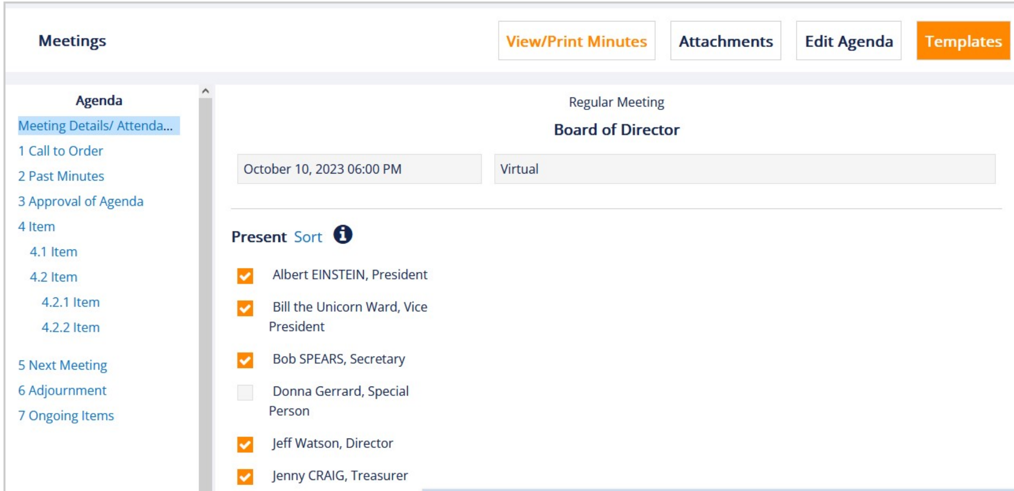


Click on the date or time that you want to edit. The Date text is blue.

OR

Go to SMART Minutes

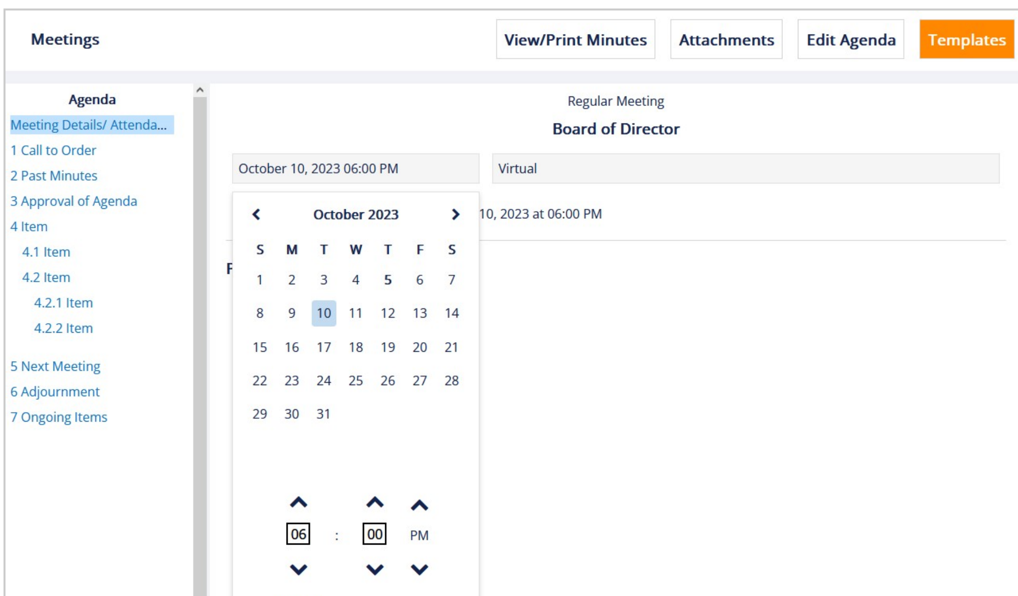
Meeting Details show the Date and Time.



Step 2

Click in the Date/Time input area.

The Calendar pops up.
Change the date and or time.



The adjusted date replaces the previous date.
Meeting list page is also updated.

Updated October 2023

How do I change the meeting time or date or location?

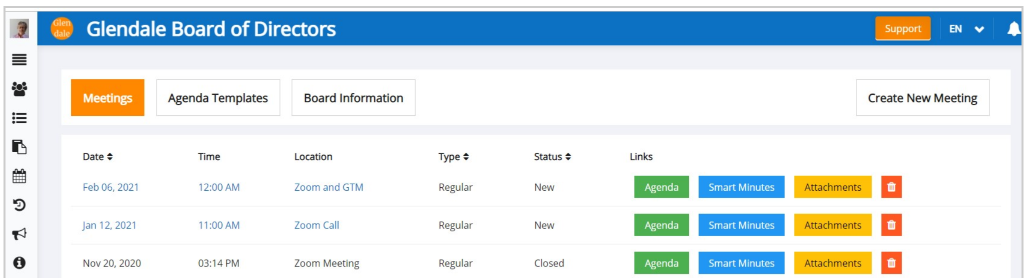
Created by Pat Crosscombe, Modified on Thu, 18 Feb 2021 at 11:42 AM by Pat Crosscombe

There are two ways to change the time of the meeting without needing to delete the meeting.

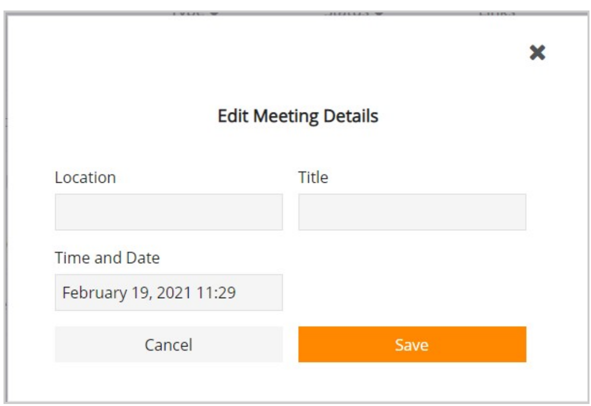
** You must be a Recording Secretary** to do this.

From the Meetings Page

Notice that new meetings show the date, time & location in blue.



Click on the link. Edit Meeting details popup allows for changes.



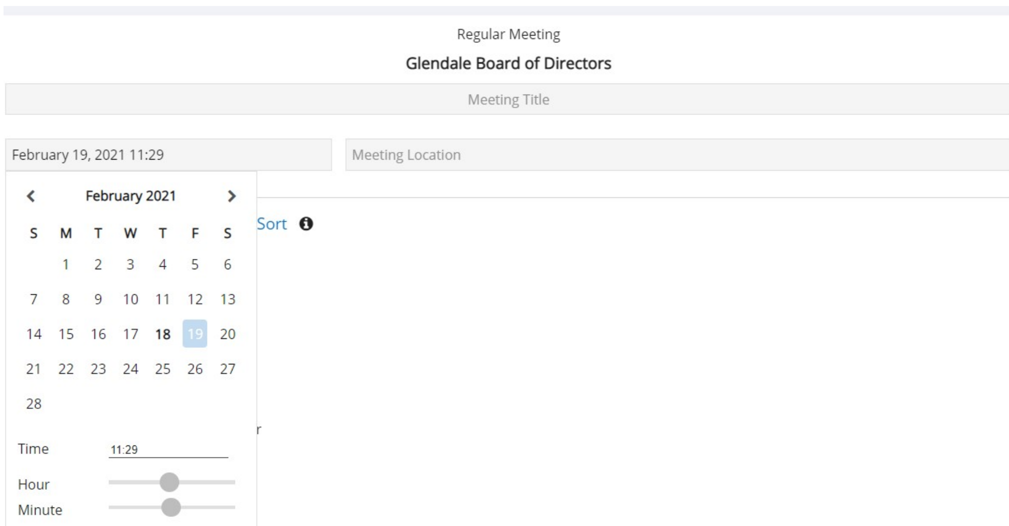
From the Minutes

1	Smart Minutes	Go to the desired meeting date.

2

3

Click in the input field for Date/Time/Location. A calendar pops up - change the date or time or enter details in the meeting location.



How do I delete documents?

Created by Pat Crosscombe, Modified on Tue, 05 May 2020 at 10:56 AM by Pat Crosscombe

What are the rules for deleting documents?

1. After a document has been uploaded to BoardSpace for six months, it becomes a permanent record, unless;

    a. In the first seven days, if it is deleted by the same user that uploaded it (this deletion cannot be undone).

    b. After seven days, but before six months, documents can be moved to trash by the recording secretary or board admin. Trashed documents are removed from the document list, but are not yet deleted.

2. After one year, trashed documents are permanently deleted automatically. After six months, trashed documents can be manually deleted by board admins.

3. Trashed documents can be restored anytime before being permanently deleted after one year.

How do I download the documents?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 12:21 PM by Pat Crosscombe

Step 1
Go to Documents

Step 2
Click on the document you want to download.

Updated October 2023

How do I edit a director or managers title?

Created by Pat Crosscombe, Modified on Fri, 12 Mar 2021 at 02:28 PM by Pat Crosscombe

I want to change the title of the president to vice-president.

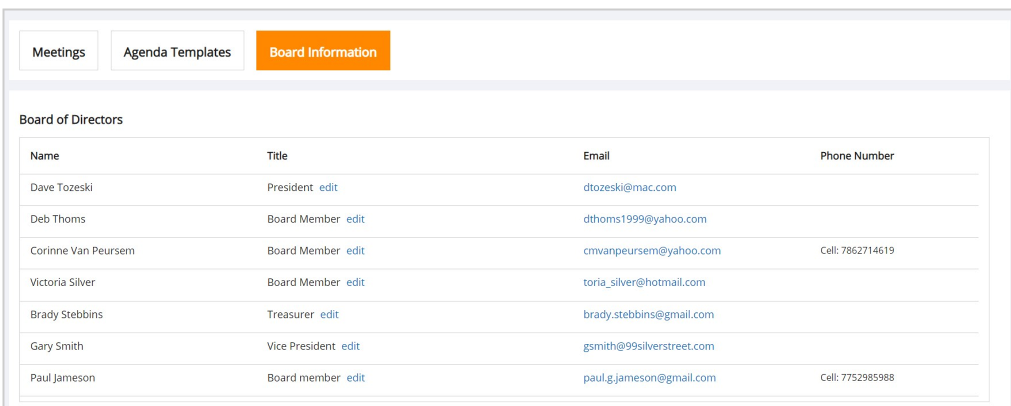
Go to the meetings page.

Click on "Board Information."

Click on edit at the end of each directors title. The position title will show up in meetings from the date of change forward. It will not change the title of meetings that took place before the date it was changed.

You can also change the titles of officers and managers in the same way.

You need to be a board admin to do this.



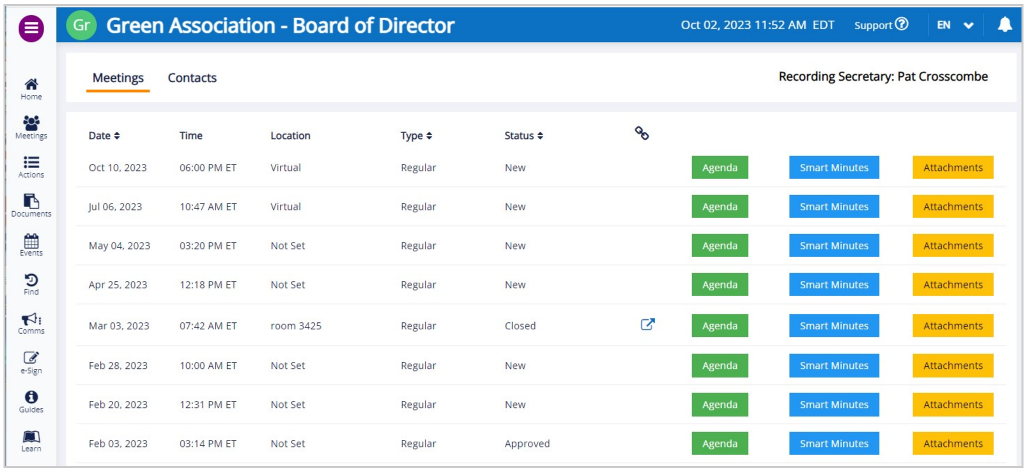
How do I edit the manager's title?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 12:12 PM by Pat Crosscombe

You must have Admin Privileges to make this change

Step 1

Go to the meetings page

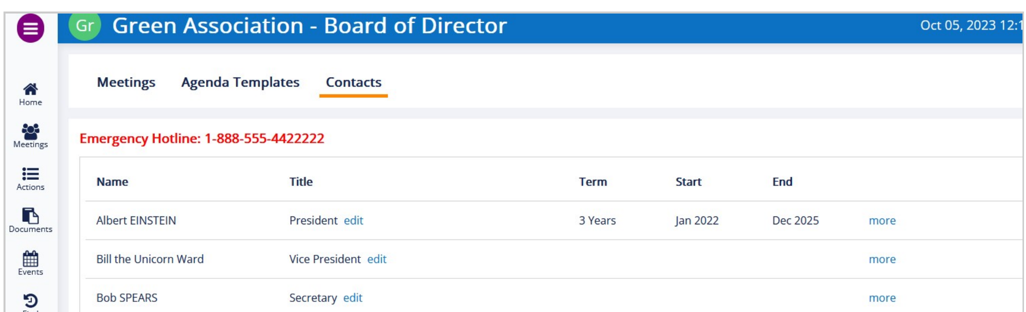


Step 2

Click on Contacts

Step 3

Click on the edit link and update the position.



Updated October 2023

Monitoring new people - Did they get an invite email?

Created by Pat Crosscombe, Modified on Wed, 18 Oct 2023 at 12:33 PM by Pat Crosscombe

I've added several new people to my board. How do I know if they have registered?

Verifying Registration Status of New Board Members

Important Note: Registration emails are automatically sent to new directors. They can sometimes land in the recipient's Spam or Junk folder. Kindly remind your new directors to check these folders if they haven't received their registration email.

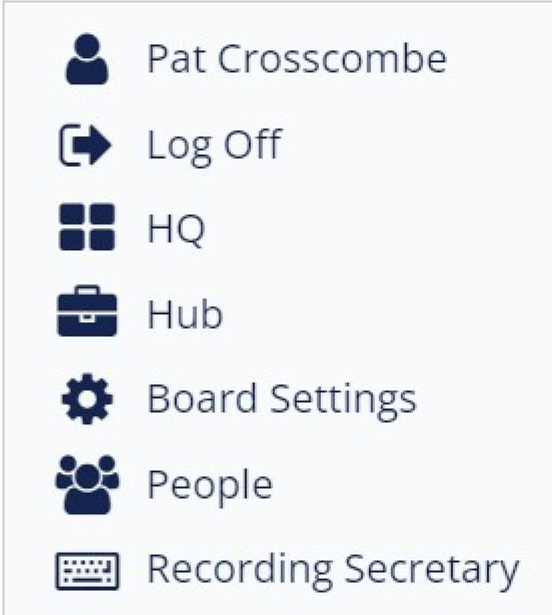
Step-by-Step Guide to Check Registration Status

1. Click on

2. Go to People from the dropdown.

If 'People' is not visible, it implies that either you lack admin privileges or you are not currently viewing a specific board or committee.

To resolve this, navigate to the relevant board or committee and then access the dropdown menu.



3. Interpreting the People List

In the 'People' section, you'll find a list of added members.

Rows with grey shading indicate pending sign-ups. This means the individual hasn't completed their registration.

Unshaded rows signify that the member has successfully registered.

Signup pending   Email change pending

First Name	Last Name	Email Address	Title	Admin	Director	Officer	Other	Special
Harry	James	harry.james@boardspace.ca	Lawyer					Yes
Lawyer	Person	lawyer123@boardspace.ca	Lawyer					Yes
Sallyanna	Brayville	sbrayville@boardspace.ca	Director		Yes			
Henry	Gavil	hgavil@boardspace.ca				Yes		
Jessica	Mayors	jessica.mayors@boardspace.ca					Yes	
Sam	Berry	berrysam@boardspace.ca	34 David Street				Yes	
OwnerTest	Test	owner.test@boardspace.ca					Yes	

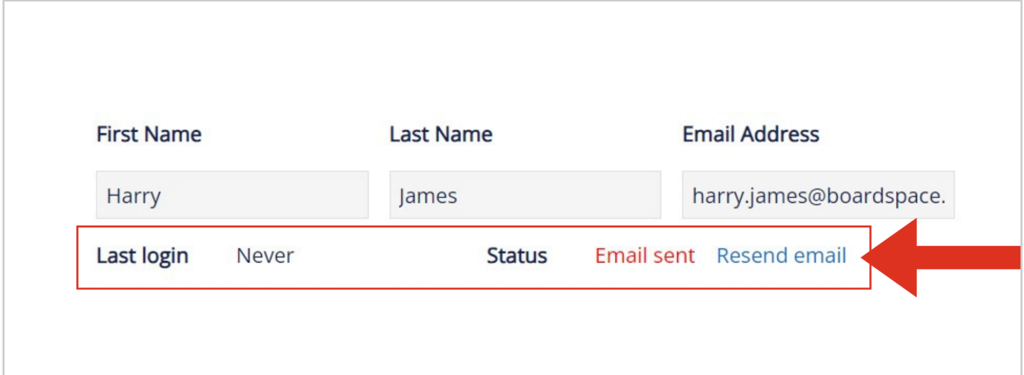
(click on the image to enlarge)

4. For Pending Sign-ups (Grey Shaded Rows):

Click on the grey shaded row.

Observe the message displayed in the red box.

To resend the registration email, click on the "Resend email" option.

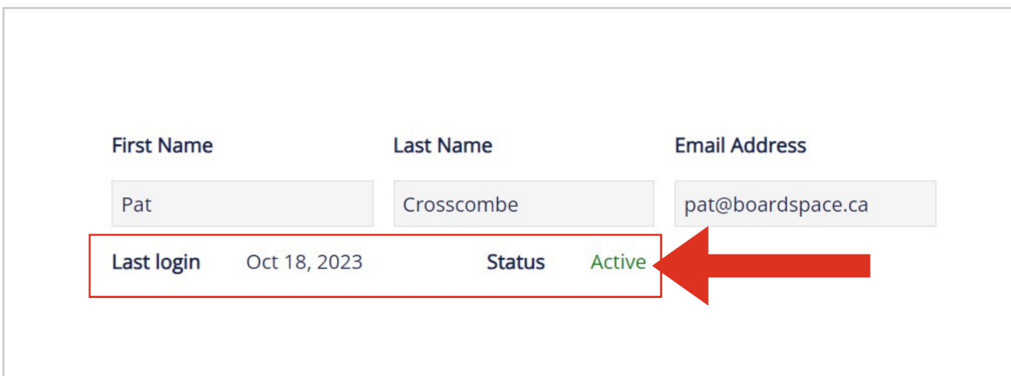


(click on the image to enlarge)

5. For Registered Users (Unshaded Rows):

Click on the unshaded row.

You can view details such as the last login date and confirm that their status is 'Active'.



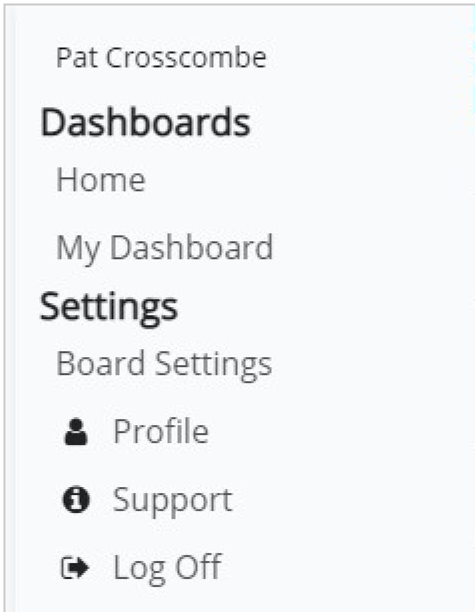
If a person still insists that they didn't receive their email, check to make sure the email address is correct.

Updated October 2023

How do I know if a user has setup their account?

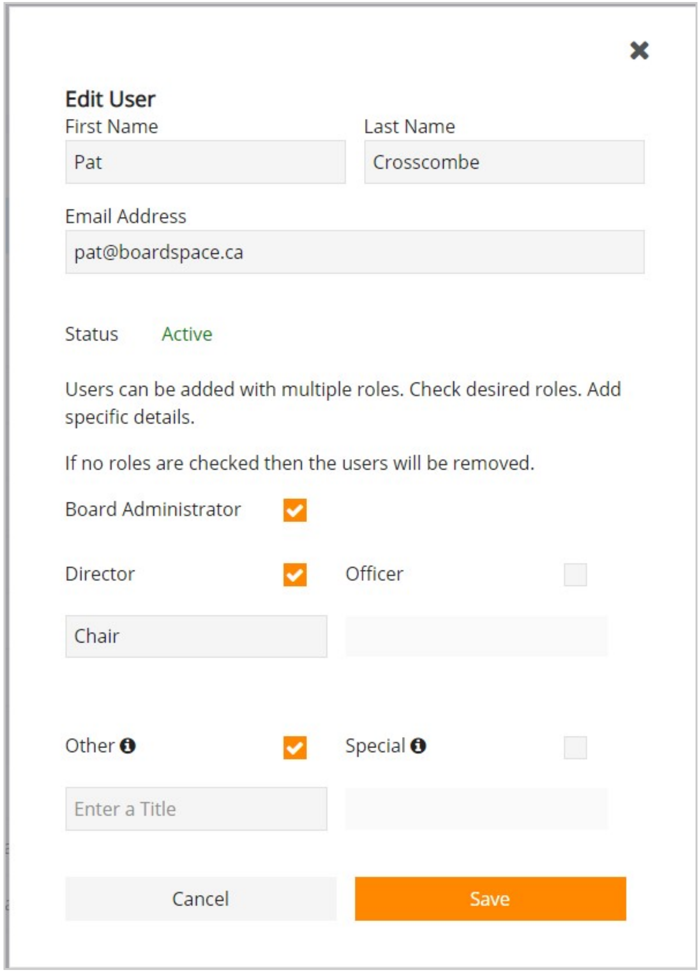
Created by Pat Crosscombe, Modified on Fri, 05 Feb 2021 at 05:37 PM by Pat Crosscombe

Step 1
Go to **Board Settings**



Step 2
Go to Manager Users

Step 3
Click on a user and a popup will show. Look at status



Step 4

If the account has not been set up you can resend the invitation by clicking **Resend email**.

How do I print the minutes without the confidential section showing?

Created by Pat Crosscombe, Modified on Wed, 17 Jun 2020 at 01:42 PM by Pat Crosscombe

If you are a board admin, director, officer, recording secretary or manager and print the minutes the confidential section will be visible.

If you need to circulate to condo or HOA owners, obviously the confidential sections must not be visible.

The best solution is to give access to the owners and invite them to log in and view the minutes. The role of owner does not give access to confidential information.

If emailing the minutes to the owners is the only option, then create a separate owner account, log in and download the minutes.

This is a bit awkward but our original thinking was that owners would be logging into their own accounts and looking at the minutes themselves.

How do I remove a user?

Created by Pat Crosscombe, Modified on Tue, 05 Apr 2022 at 03:24 PM by Pat Crosscombe

1. Click on the drop-down menu at the top left-hand side of the screen.

2. Click on "Manage Users"

3. Click on a user

4. Go to roles.

5. Uncheck position(s).

6. If no positions remain, the user loses access to BoardSpace

How do I send emails to the board

Created by Pat Crosscombe, Modified on Wed, 04 Mar 2020 at 01:42 PM by Pat Crosscombe

1. From the meeting list page - Go to Notify (left-hand side menu)

2. Click on Send Notifications (at top of page)

3. Send to: Check off who you want to send to.

4. Option 2 - Custom message

5. Add the subject line and message.

6. Click send.

OR

If the agenda is ready for review

7. Pick Option 1

8. From the dropdown - select meeting date.

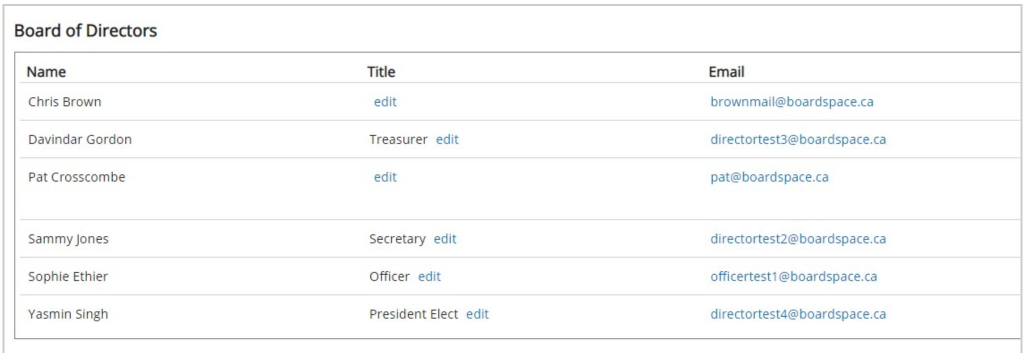
9. Choose "Agenda is ready for review."

How do I update a user's position title?

Created by Pat Crosscombe, Modified on Mon, 22 Jun 2020 at 05:43 PM by Pat Crosscombe

Board Admins can update the position/title for any user.

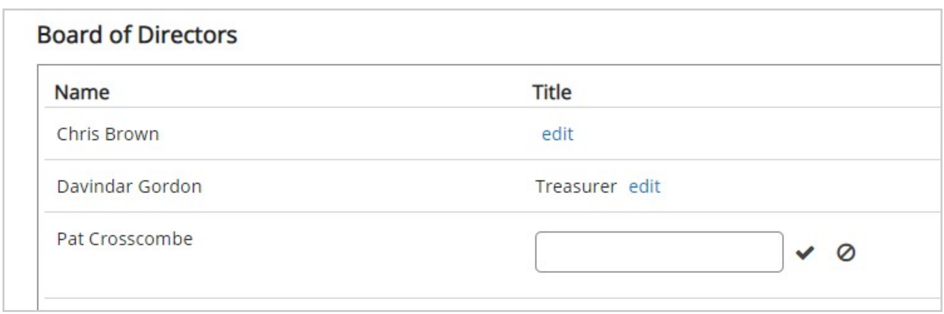
1. Go to the meeting list page - and then click on board information.



Board of Directors

Name	Title	Email
Chris Brown	edit	brownmail@boardspace.ca
Davindar Gordon	Treasurer edit	directortest3@boardspace.ca
Pat Crosscombe	edit	pat@boardspace.ca
Sammy Jones	Secretary edit	directortest2@boardspace.ca
Sophie Ethier	Officer edit	officertest1@boardspace.ca
Yasmin Singh	President Elect edit	directortest4@boardspace.ca

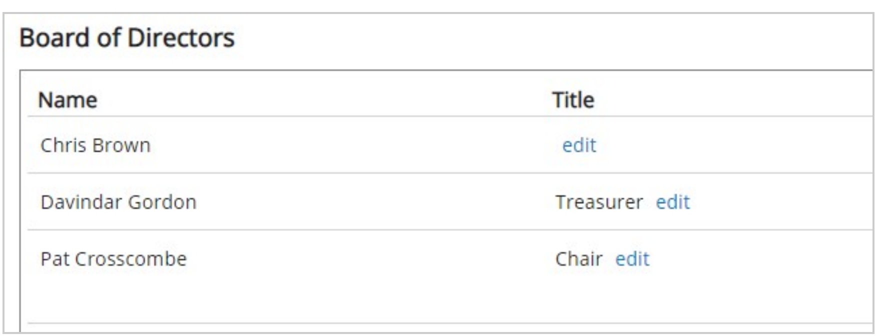
2. Click on edit. Enter the updated information in the input field. Click on the checkmark to save.



Board of Directors

Name	Title
Chris Brown	edit
Davindar Gordon	Treasurer edit
Pat Crosscombe	

3. Pat Crosscombe has been updated with the title of **Chair.**



Board of Directors

Name	Title
Chris Brown	edit
Davindar Gordon	Treasurer edit
Pat Crosscombe	Chair edit

How do I update or change the positions assigned to user?

Created by Pat Crosscombe, Modified on Tue, 05 Apr 2022 at 03:12 PM by Pat Crosscombe

1. Click on the drop-down menu at the top left-hand side of the screen.

2. Click on "Manage Users"

3. Click on a user

4. Go to roles.

5. Uncheck & check position(s) as needed.

6. If no positions remain, the user loses access to BoardSpace

How is the status of the meeting minutes updated?

Created by Pat Crosscombe, Modified on Tue, 10 Mar 2020 at 01:00 PM by Pat Crosscombe

I see different things under status for the meeting? One is NEW, another is CLOSED, and another is APPROVED.

How is the status changed or updated?

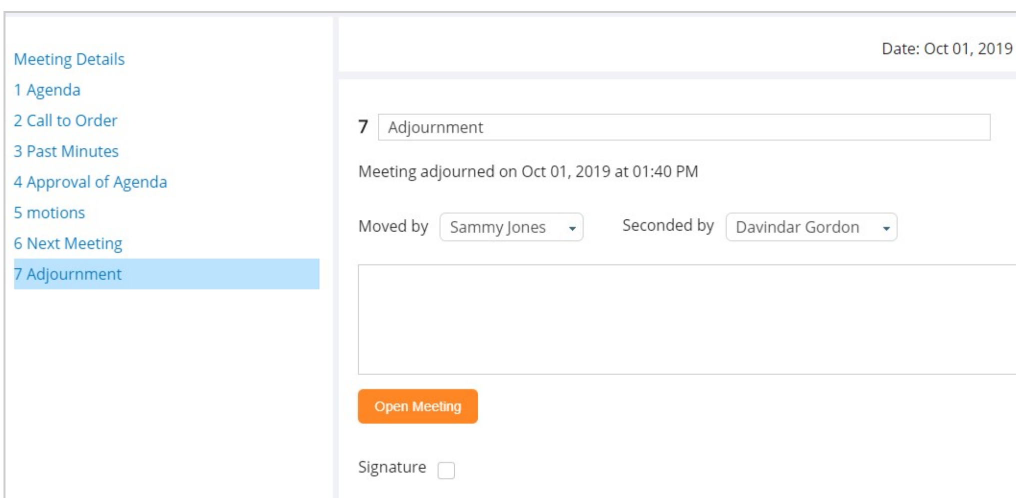
When a meeting is created it will have a status of NEW.

The status changes from New to Closed when you close the meeting (assuming that the meeting has been called to order earlier).

How do I change the status to Approved?

The meeting must first be closed. In a subsequent meeting, add the past minutes' module to the agenda. Then approve the motion. The minutes are converted to pdf and can't be further edited.

Meetings can be re-opened by going to adjournment and clicking on the Open Meeting button (see screenshot below).



How many documents can I upload?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 11:51 AM by Pat Crosscombe

You have lots of room to save documents.

The specific capacity is determined by your plan.

How often does the outstanding action list get emailed?

Created by Pat Crosscombe, Modified on Fri, 28 Jun 2019 at 11:21 AM by Pat Crosscombe

The outstanding action list does not get emailed weekly. An email is sent to each director or manager with their own outstanding actions.

The list is sent Monday mornings – just after midnight.

How to add a manager to a board

Created by Pat Crosscombe, Modified on Wed, 18 Oct 2023 at 05:27 PM by Pat Crosscombe

Who are managers?

Examples of managers include

- Property or Association Managers
- General Manager
- CEO
- Executive Director
- Executive Assistant

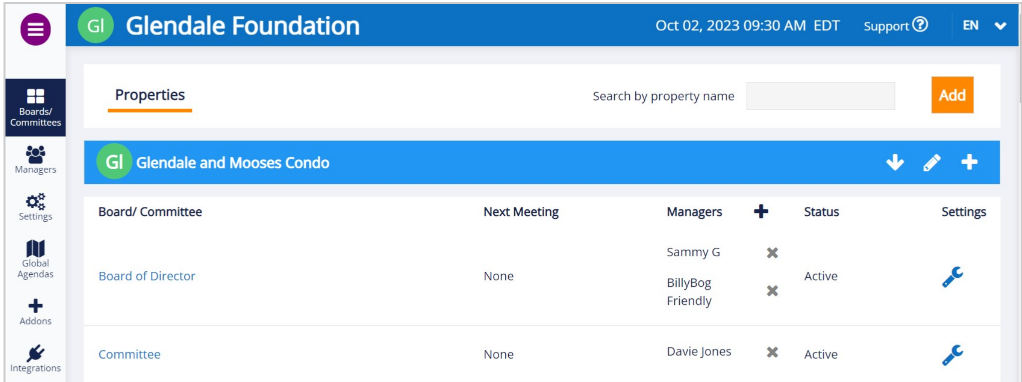
Managers do not vote and may not be directors or officers but they can be admins and recording secretaries.

Managers can be part of an unlimited number of boards or committees.

Who can add a manager?

Only Super Admins can add managers to boards or committees.

Adding managers is done from HQ.

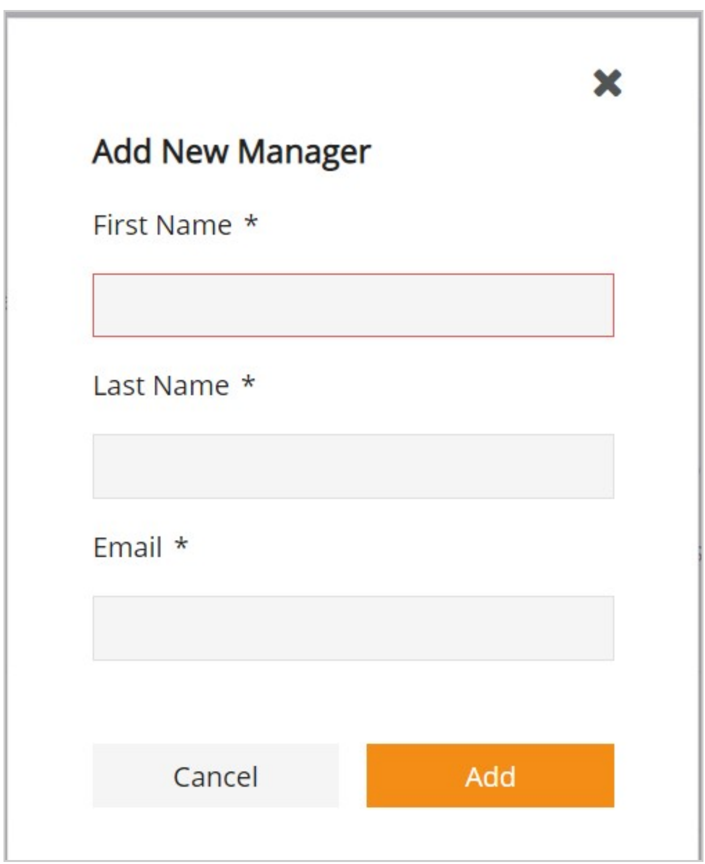


(Click on any image to enlarge it.)

Add a Manager first then assign him/her to specific boards or committees.

Go to Managers (icon on left-hand side.

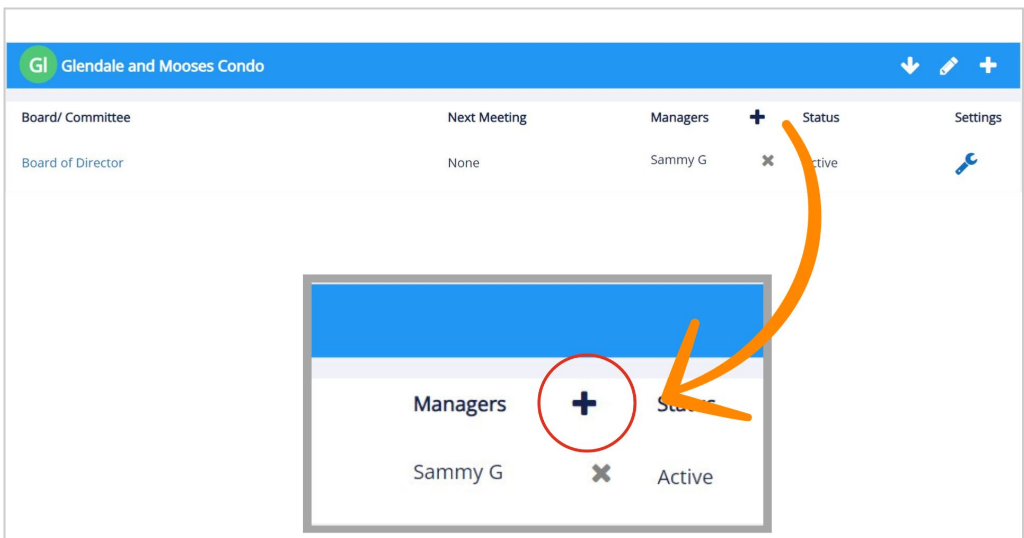
Click on Add New Manager and add information in popup.



The new manager is automatically sent an email inviting them to set up their account.

Click on

Click on the + in the table header row at the right-hand side of Managers.

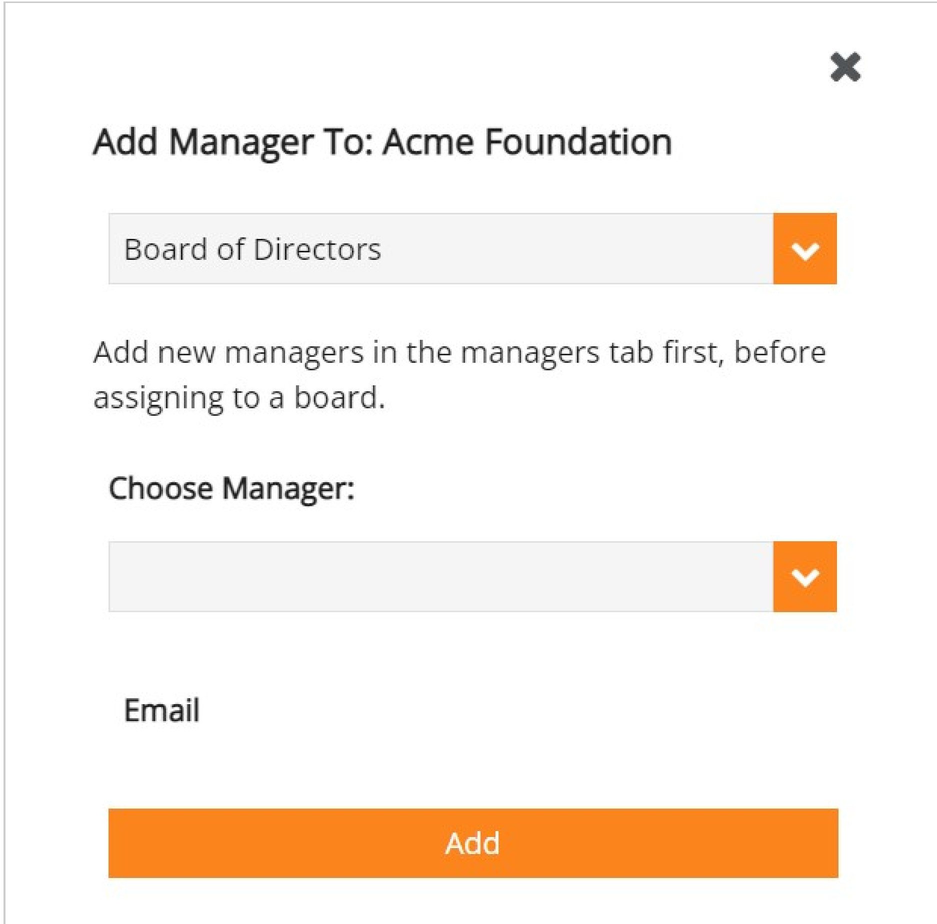


(Click on any image to enlarge it.)

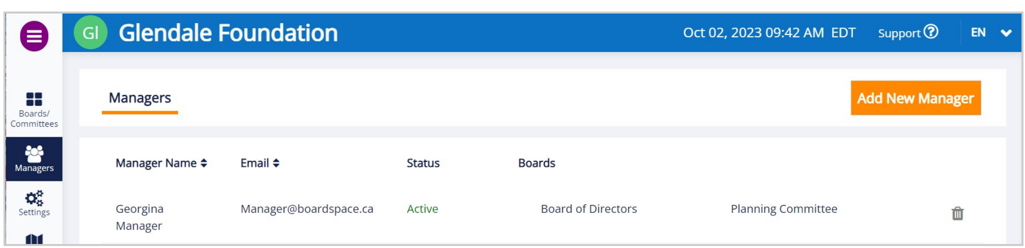
From the dropdown, select the board or committee.

Pick a manager from the 2nd dropdown, click save.

The manager now has access to that board or committee.



A list of current managers and their board and committee assignments is listed.



Click on any image to enlarge it.

Updated October 2023 (linked to Learn page)

How to add an e-Signature to your minutes

Created by Pat Crosscombe, Modified on Sun, 17 Dec 2023 at 12:19 PM by Pat Crosscombe

About E-Signatures

You must be the recording secretary to add an e-signature.

Adding an e-signature requires the minutes to be approved first. An e-signature **DOES NOT** replace a motion to approve the minutes.

I'll use an example.

The Board of Acme Foundation wants to e-sign the minutes from October 17, 2023.

Before adding an e-signature, the board must wait for a subsequent meeting to approve the minutes.

This meeting takes place on November 22, 2023. The minutes from Oct 17 are approved with a motion to approve the minutes.

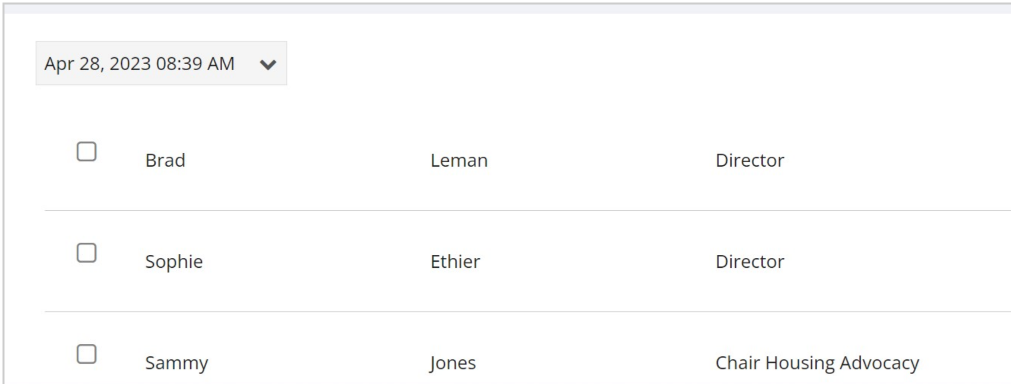
In BoardSpace it results in the minutes being locked and no further editing possible.
Now with the motion is approved, the Recording Secretary can add an e-signature by following the steps below.

1. Go to e-Signatures (left-hand side menu)	

2. Go to New e-Signature (top right-hand side)

3. Select the meeting date from drop down

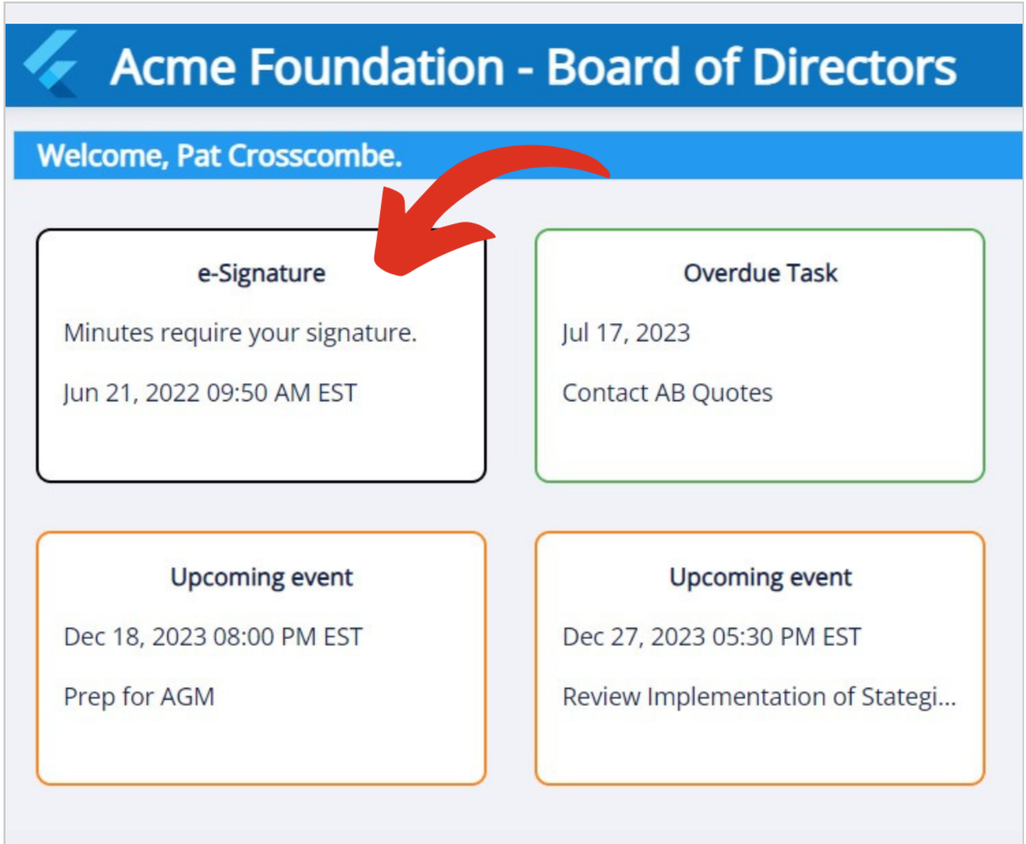
4. Add a check beside directors who are being invited to sign.



For Directors

When a director is invited to e-sign, they will see a Tile on their Home page. Clicking on the tile goes to the page where he/she checks the box beside their name.

Reminders can also be sent by the Recording Secretary.



Updated December 2023

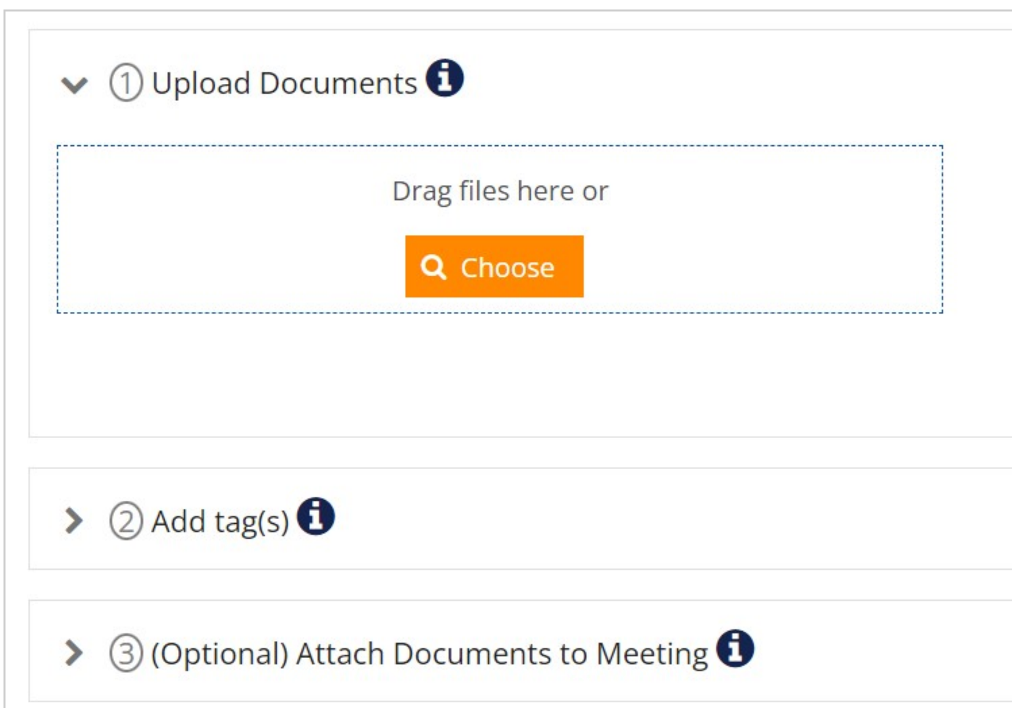
Uploading Documents & Associating to a meeting

Created by Pat Crosscombe, Modified on Wed, 20 Dec 2023 at 09:25 AM by Pat Crosscombe

1. Navigate to the Documents page

2. Locate and click on the

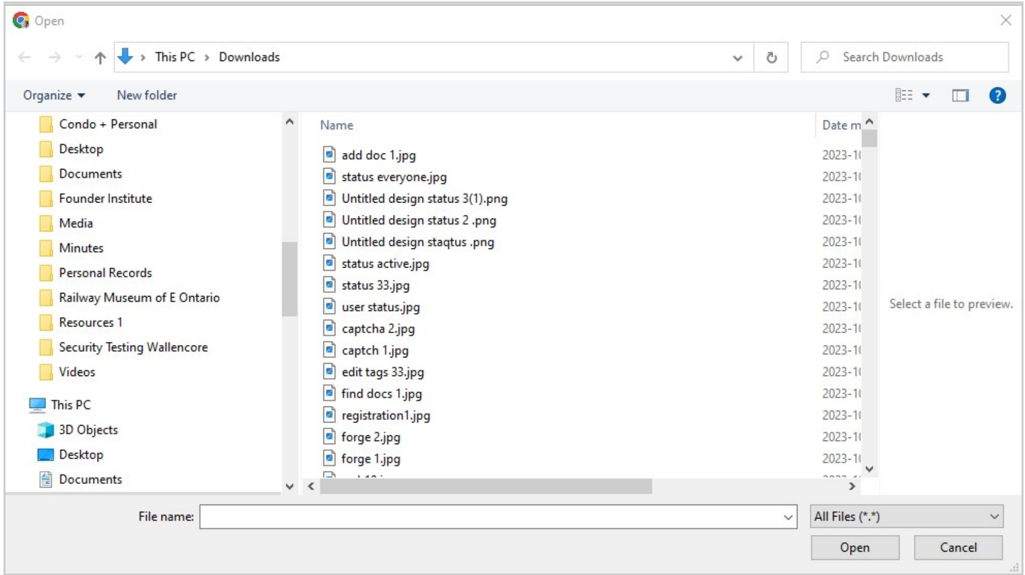
3. Follow Steps 1, 2 and 3 - as in the next image.



Step 1: Upload Documents

Click on Choose

Your computer's file manager opens (this will look different on some computers)

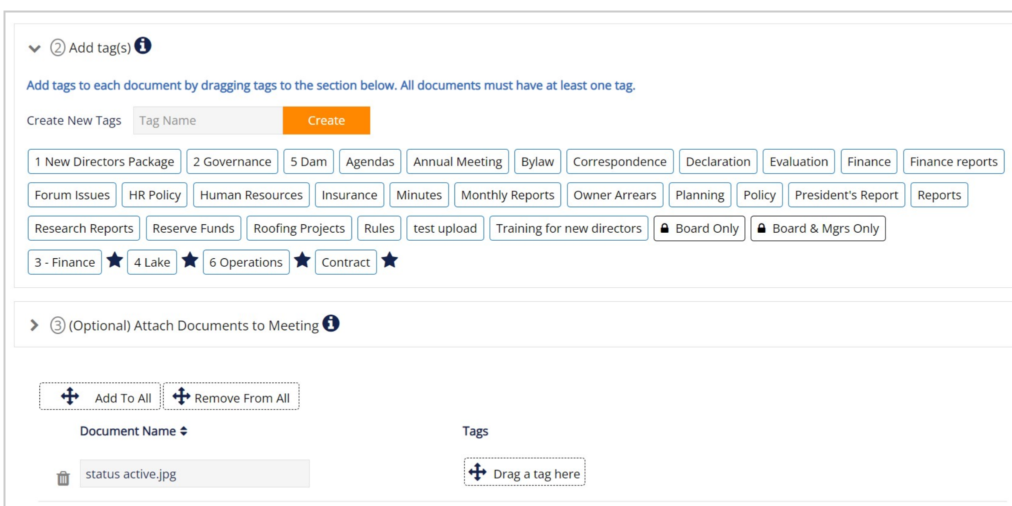


Choose the documents for upload. Click Open.

Document is added under **Document Name**

Step 2: Add tags

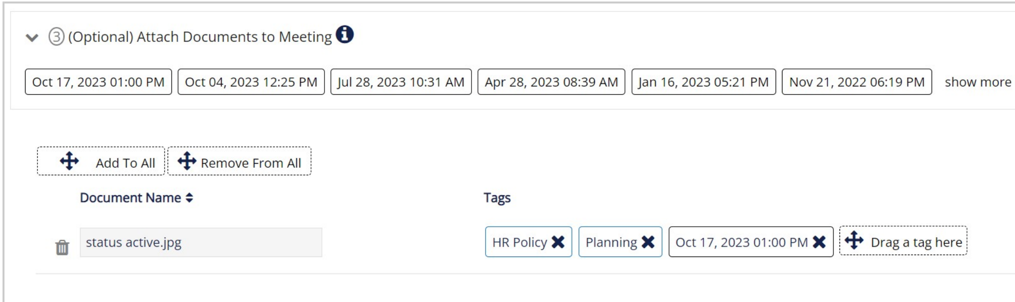
Tags are dragged. Watch your cursor - it changes from a pointer to a hand when hovering over a tag. When the cursor becomes a hand, drag the tab to Add to all or to Drag a tag here



(click on image to enlarge)

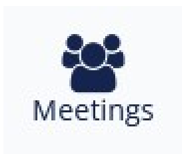
Step 3: (Optional) Attach Documents to a meeting.

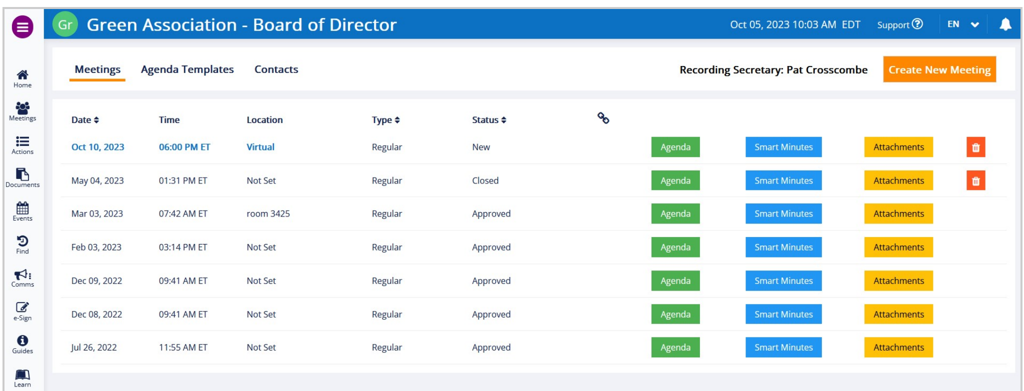
Adding a meeting tag links the document to a respective agenda and meeting.



4. If you have added meeting tags to documents, you can view them by ...

Go to

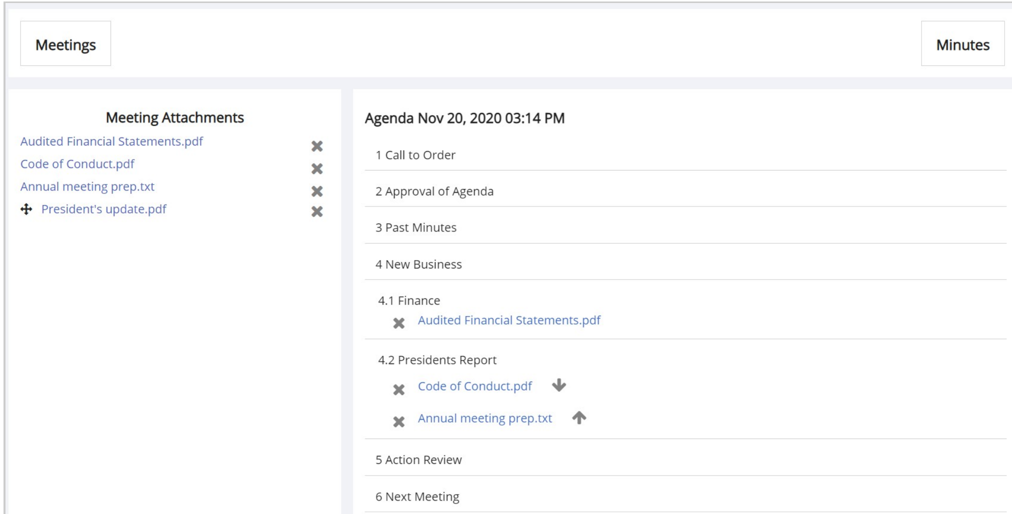




(Click on image to enlarge.)

To see the documents added for that meeting, click on

- Documents added to a meeting are listed on the left-hand side
- Recording Secretaries can organize the documents by agenda item by dragging the document to an agenda item and dropping in an agenda item.



(Click on image to enlarge.)

- Documents can be removed from the agenda by clicking on the ✖ . The document can then be dragged to a different agenda item. This does not delete the document from BoardSpace, only removes it from this meeting.

- To remove a document from the meeting, click on the x on the right-hand side of the document name in the Meeting Attachments list. This does not delete the document from BoardSpace, it only removes it from the meeting.

- Documents can be reordered in the agenda item by clicking on the 🡇 (arrows) (only by Recording secretary).

- If you don't see a document in the meeting attachments list, return to Documents, and drag a meeting tag to it.

Updated October 2023 (link to Guides & Help)

How to Add Multiple People using a CSV File

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 12:02 PM by Pat Crosscombe

Adding multiple people at once is much faster if importing from a spreadsheet.

Check out the **definitions of positions** before adding people.

Sample CSV File

Step 1

Create a spreadsheet using Google Docs or Excel.

Step 2

Make sure that the spreadsheet contains a column header on the first line consisting of at a minimum **First Name, Last Name,** and **Email address.**

Optional: Create extra columns for positions, ex: Director, Officer, etc, this is where you will add the position titles for the positions ex: put Chair in the Officer column

	A	B	C	D	E
1	firstName	lastName	email	directorTitle	officerTitle

Emails addresses must be in the correct format (example - bill@boardspace.ca).

- Note that the email address is the unique identifier. This allows adding contacts with the same name as long as their email addresses are different.

Step 3

Add names, emails, and titles for users in the corresponding columns.

If adding a person - Alex Baldwin, who is an officer with the title Chair, and an email address abladwintest@boardspace.ca.

Enter Alec in the First Name Column, Baldwin in the Last Name column, abladwintest@boardspace.ca in the email column and Chair in the officerTitle column.

	A	B	C	D	E
1	firstName	lastName	email	directorTitle	officerTitle
2	Owen	McAdams	omcadamstest@boardspace.ca		Newsletter Editor
3	Wendy	Riddler	wriddlertest@boardspace.ca	Secretary	
4	Omar	Brison	obrison@boardspace.ca	Treasurer	
5	Alec	Baldwin	abladwintest@boardspace.ca		Chair
6	Emily	Tyson	etysontest@boardspace.ca	Director-at-large	
7	Amy	Hurst	ahursttest@boardspace.ca		President
8	Erica	Danes	edanestest@boardspace.ca	Treasurer	CEO
9	Check	Payer	cpayer@boardspace.ca	President	Chair

Note:

Each person's information can be edited after uploaded and each person can have more than one position.

For example, a person could be a director and an owner/member.

Step 4

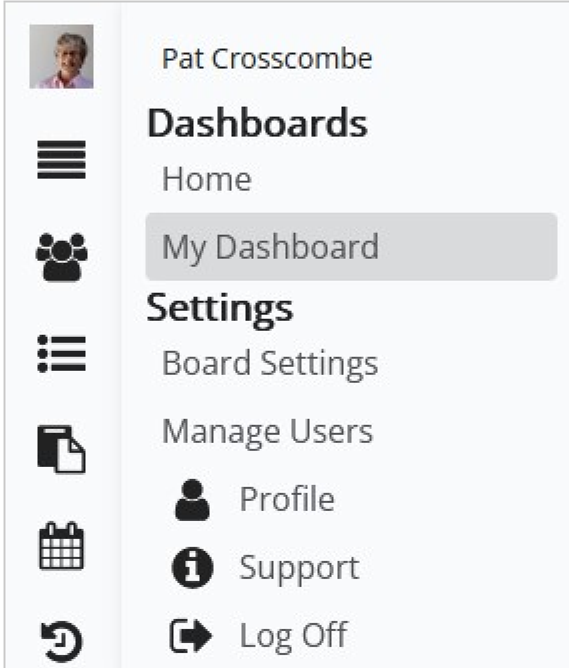
Save spreadsheet - go to File > Save As. In the contextual menu, name your file and select comma separated values (.csv) as the file format.

Note: Only CSV file formats (.CSV) can be uploaded into BoardSpace.

Uploading People with Contact Information and Positions

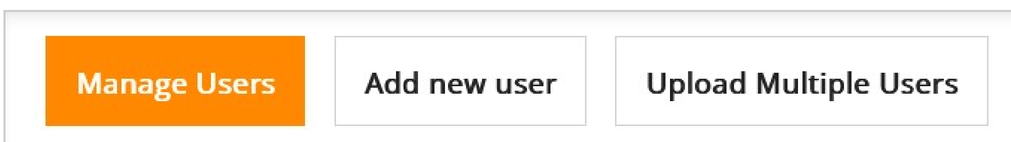
Step 1

Go to Board Settings

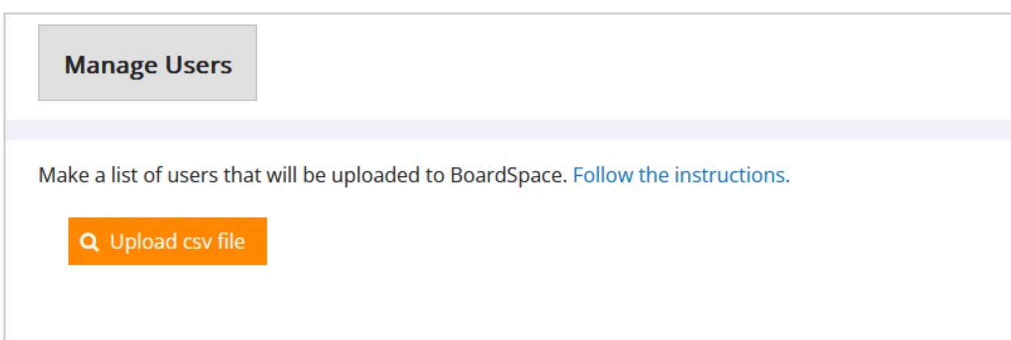


Step 2
Click on "Manage People" (located on left-hand side menu)

Step 3
Click on "Upload Multiple People"

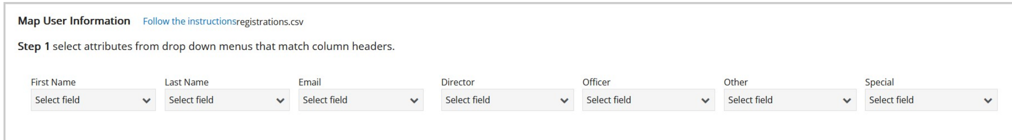


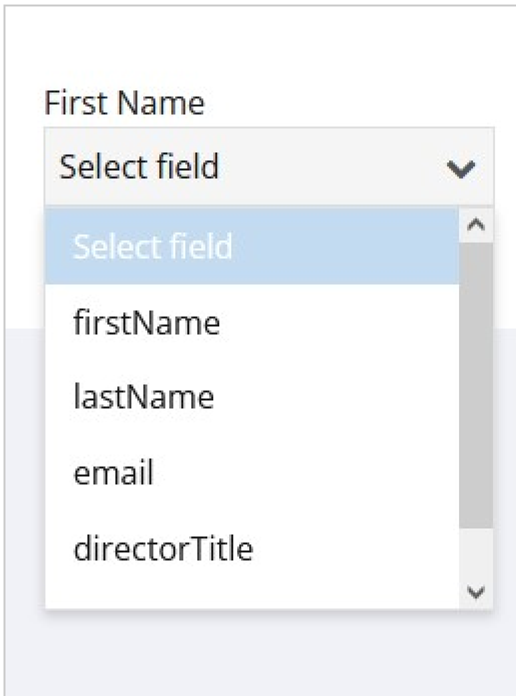
Step 4
Click the button Upload csv file



Step 5
People must be added with a first name, last name and email address.

Under First Name select from the dropdown the column heading title that contains your users' first names. Follow the same procedure for Last Name and Email.





Step 6
People must have at least one position (but could have more than one).

If the spreadsheet

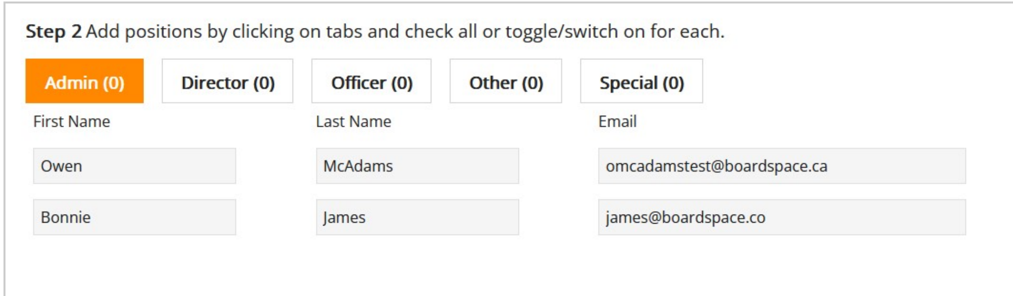
(a) included positions

- map the correct header dropdown from the title (ex: select director titles under Director)
- If any columns are not needed, do not select any field from the Director, Officer, Owner/Member, Professional dropdowns.

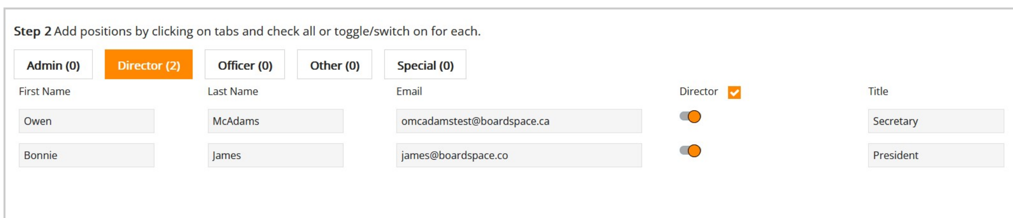
IMAGE HERE

(b) did not include positions

- Start by assigning some people as Admins - click on Admin tab



- To add a position to every person click the checkbox beside the title of the position (Officer, Director, etc) to select every person, fill in the title as desired (Administrator is added for Admins - no custom title can be added)
- To add a position to one user toggle the switch to on and enter a title



- Continue until all added people have at least one position.
- The number in the brackets beside the position title is the number of people currently assigned to that position

Step 7

- Click on Import

Reasons for Upload Failure

- Invalid email address in the CSV file that doesn't follow the proper format (eg. bill@boardspace.ca).
- Columns that are not mapped to any of the fields.
- Adding the same email address again.

- Mapping a column twice.

Updated Sept 2023 [need to add images]

Attachments (1)

CSV Sample CSV f....csv
67 Bytes

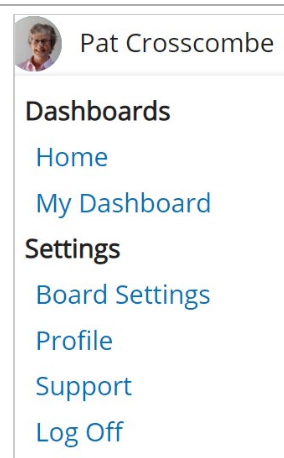
How to add new Users

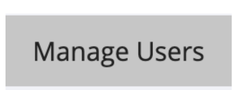
Created by Pat Crosscombe, Modified on Tue, 11 Aug 2020 at 04:21 PM by Pat Crosscombe

Make sure to add users such as Directors and Officers before a board meeting takes place. This will add the directors to the attendance list, and allow for dropdowns to be populated correctly.

Check out the different types of users before adding any. Here is the **Link**

This guide shows how to add new users one at a time. To bulk upload users follow **this guide**

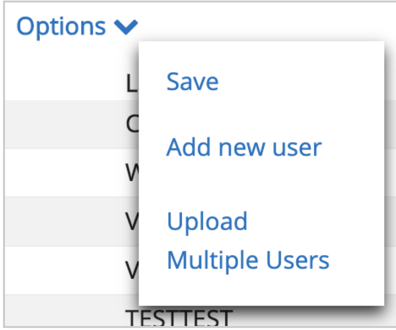
1. Go to the meeting list page, click on the photo or icon (at the top-left of meeting list page) From the drop-down, click on Board Settings	

2. Click on 

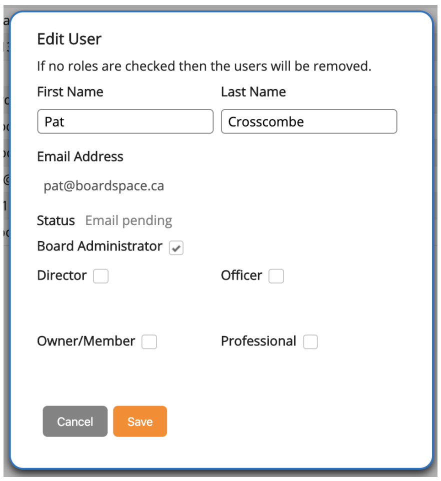
3. Super admins are automatically added as board admins. Board Admins manage everything related to a specific board or committee. For example, board admins can add and remove any user.

4. This example shows how to add a board administrator. The same process is followed for any user role.

Add a board admin by going to options > add new user

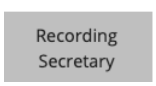


5. Enter details, check Board Administrator & click save.

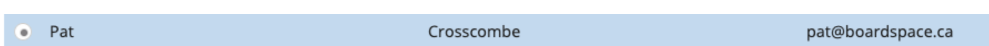


6. Recording Secretary - Add the board administrator as the recording secretary so that the basics for the first meeting can be set up.

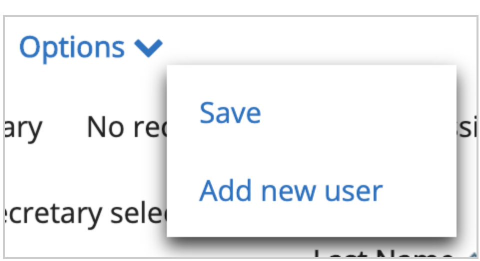
Go to



7. Click the radio button beside the person just added.



8. Click Options > Save



The new recording secretary will be shown at the top.

Current Recording Secretary Pat Crosscombe pat@boardspace.ca

To add multiple users at the same time follow **this guide**

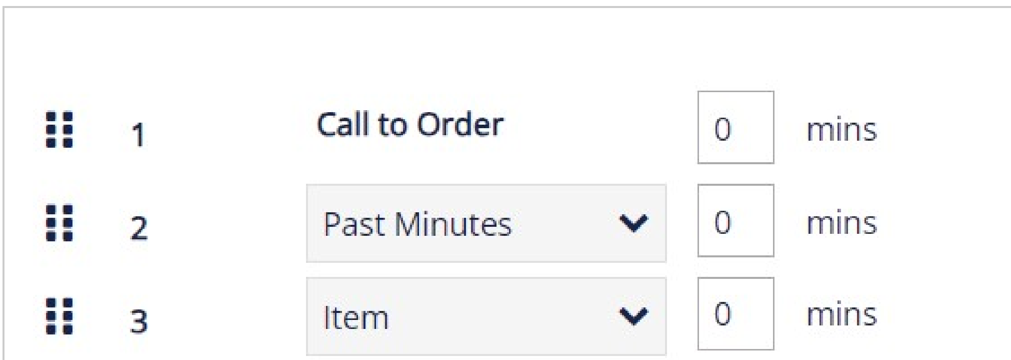
How to approve the minutes.

Created by Pat Crosscombe, Modified on Mon, 30 Oct 2023 at 10:21 AM by Pat Crosscombe

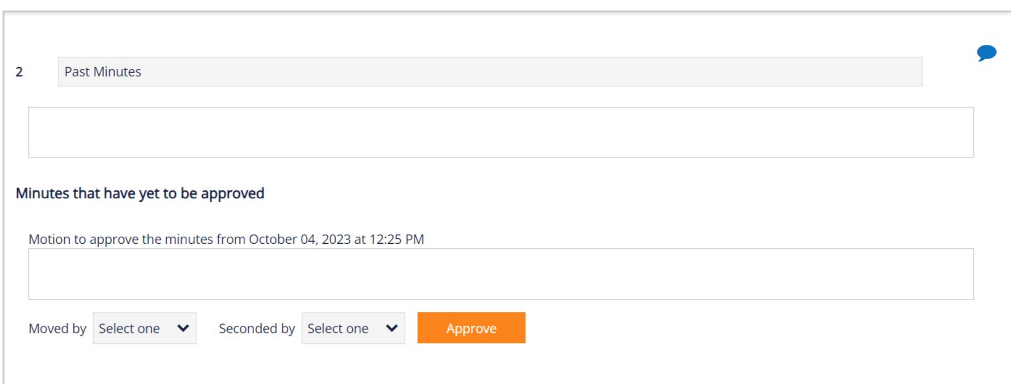
From Home, go to Minutes, and then to Agenda for a specific meeting. You must be the recording secretary to edit the meeting agenda.

Add "Past Minutes" as an agenda item to the agenda. Click in the dropdown, choose Past Minutes

Minutes are approved in subsequent meetings.



When you return to the minutes, notice that the system lists any previous minutes that need approval.



(click on image to enlarge)

Select people from the Move by and Seconded By dropdowns and click Approve.

DRAFT is removed once the minutes have been approved.

Be sure to update your Agenda Template to include the Approval of Past Minutes so that future meetings will include the Past Minutes.

For more information on the **agenda items**

Updated October 2023

How to create a poll, survey or vote

Created by Pat Crosscombe, Modified on Fri, 13 Oct 2023 at 09:58 AM by Pat Crosscombe

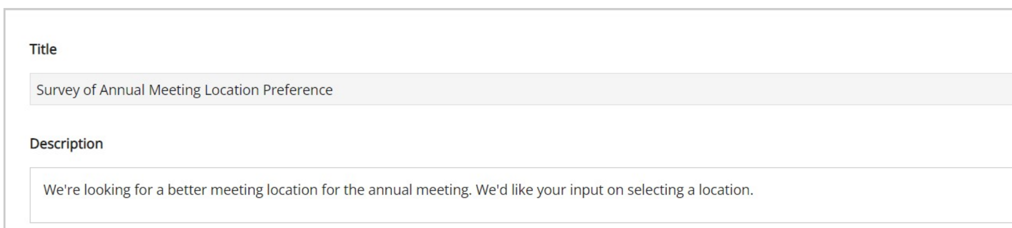
From the left-hand side menu icons,

Click on 

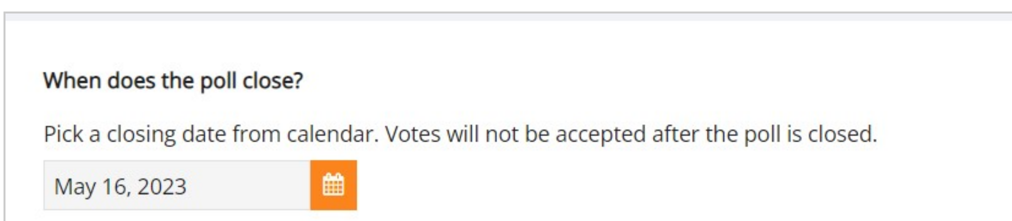
From the two options, choose Polls

1. Click on "New Poll"

Add Title and Description (as below)



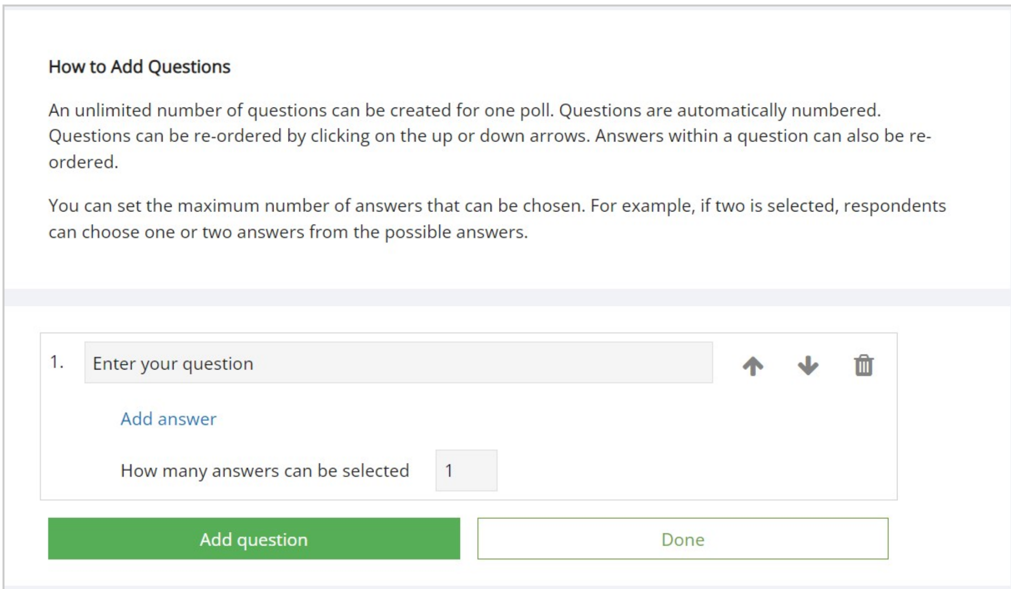
2. Add a closing date for your poll.



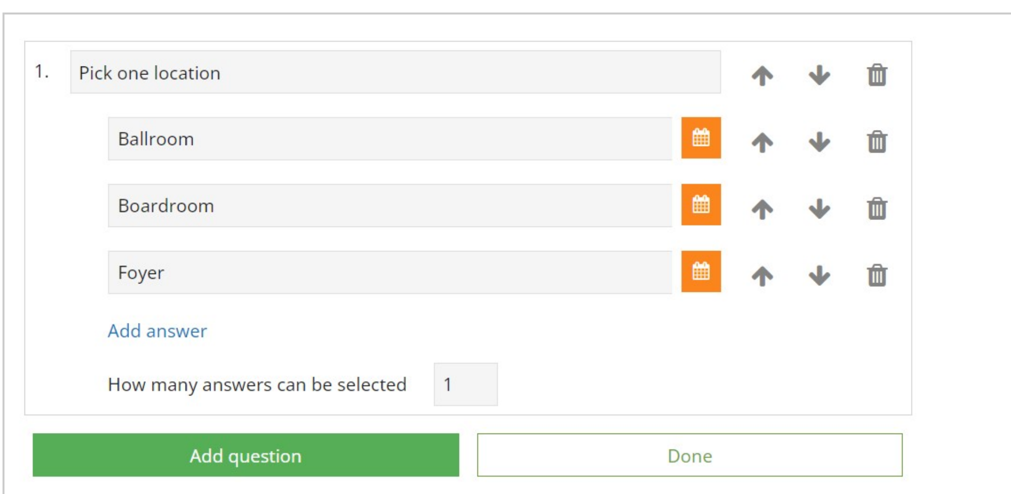
3. Determine the level of privacy

4. Adding questions to your poll.

One or more questions can be added to a poll.

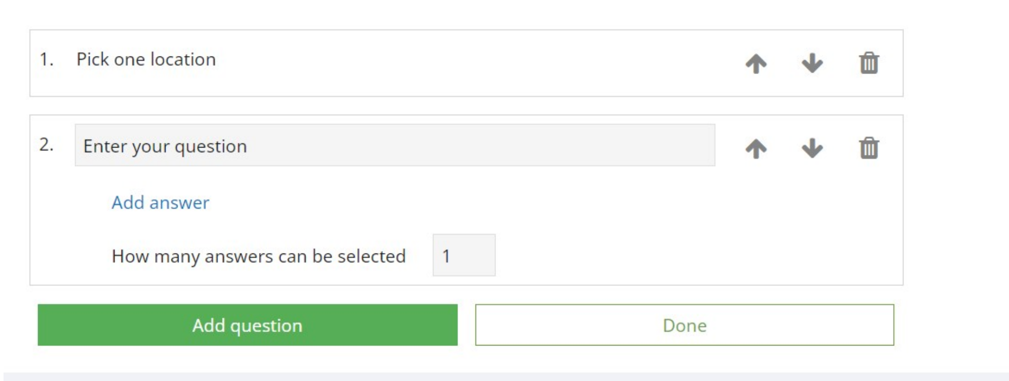


Start by clicking on Add question

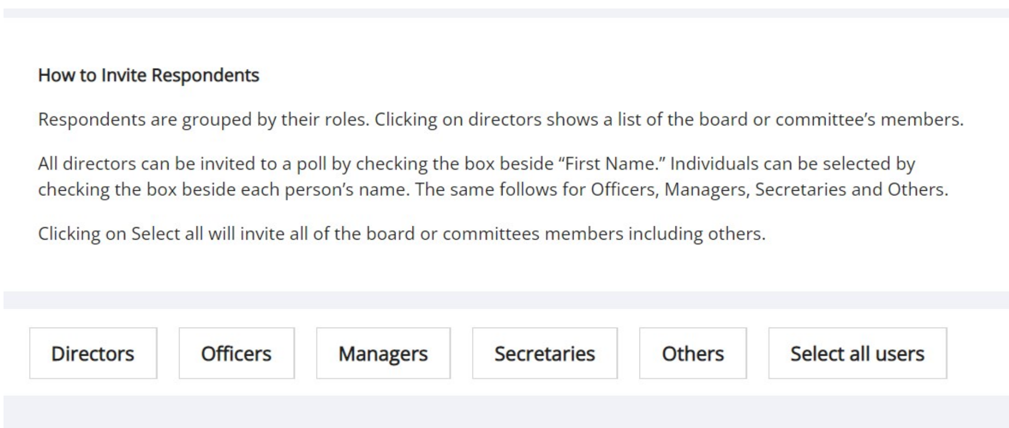


If finished adding questions, click on Done.

Or add additional questions by clicking on the Add Question.



5. Invite respondents.



Directors | Officers | Managers | Secretaries | Others | Select all users

☐	First Name	Last Name	Email
☐	Pat	Crosscombe	pat@boardspace.ca
☐	Jeff	Watson	jeff@boardspace.ca
☐	Brad	Leman	patricia.crosscombe@alumni.carleton.ca
☐	Sophie	Ethier	officertest1@boardspace.ca
☐	Sammy	Jones	directortest2@boardspace.ca
☐	Sallyanna	Brayville	sbrayville@boardspace.ca
☐	Guy	Vellna	testdirectortest3@boardspace.ca
☐	Terrence	Singh	tsingh@boardspace.ca

A poll can be saved as a draft and edited further. Once the poll is finalized, click on Send Poll.

Before a poll closes, reminders can be sent to those invitees who have not yet voted. Click on the email icon to send.

How to edit the meeting date and/or start or end time of a meeting.

Created by Pat Crosscombe, Modified on Thu, 20 May 2021 at 04:08 PM by Pat Crosscombe

There are several ways to set, edit or change the date and time of a meeting. This includes the start or end time for any meeting

Note: These changes can only be made by the recording secretary.

Scenario #1: After the meeting has been called to order, I need to change the date and/or time

Scenario #2: Before a meeting is called to order, the date and/or time can be edited from the meetings page.

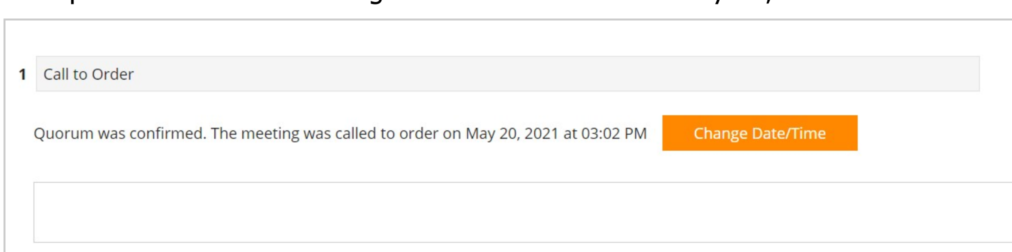
Scenario #3: Changing the date and/or time of a meeting from the Minutes in the Meeting Details/Attendance section (before it is called to order).

Scenario #4: The meeting has been closed and I need to change the date and/or time

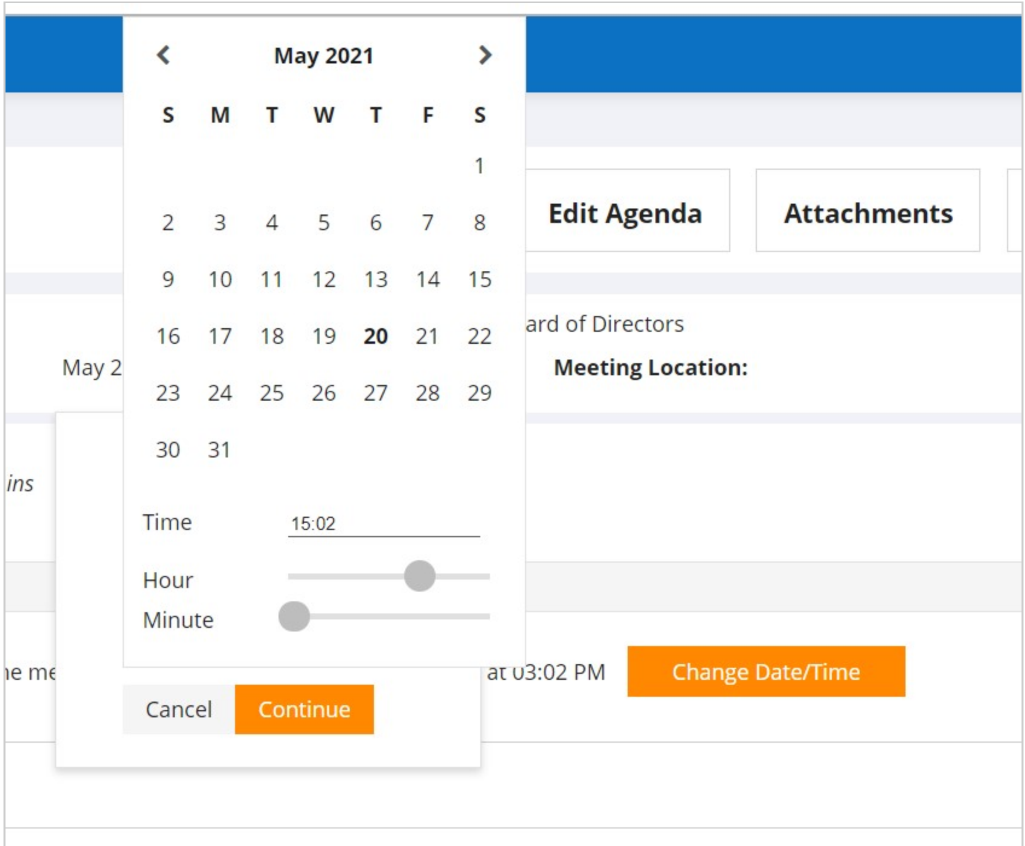
Scenario #1:
After the meeting has been called to order, I need to change the date and/or time

a) In this scenario, the recording secretary clicks on -	
The system sets the date and time based on the users computers clock.	

b) Later, the recording secretary wants to change the date and/or time. In this example note that the meeting was called to order on May 20, 2021 at 3:02 PM

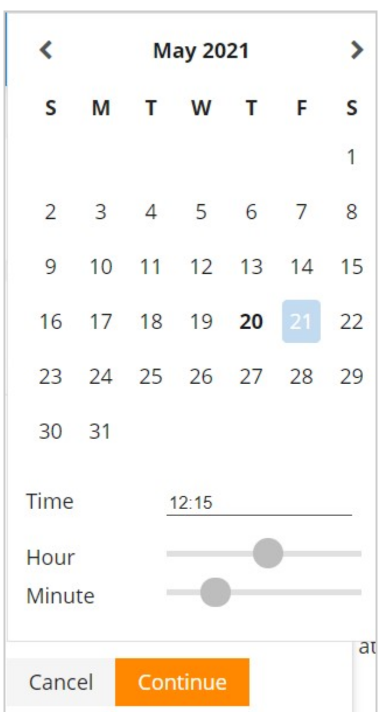


c) Clicking the Change date/time brings a calendar popup



d) The date is changed by selecting a different date in the calendar.

The time can be changed by entering a new time beside "time" or dragging the Hour or Minute sliders



In the above screenshot, I have selected the 21st as the correct date and then I enter 12:15 beside Time. and then clicked continue.

The meeting date/time is corrected.

Scenario #2:
Before a meeting is called to order, the date and/or time can be edited from the meetings page.

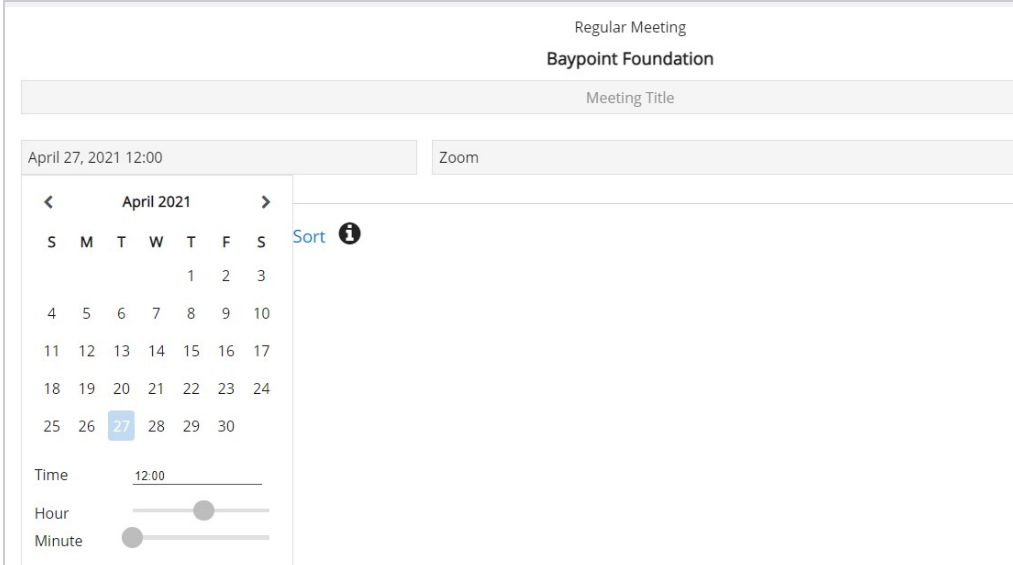
Changes can be made from the meetings page before the meeting is called to order.

Note the blue text for **Date, Time, and Location.** This indicates that those fields can be edited.

If a user clicks on the date, a popup shows. Clicking in the Time and Date box brings a calendar. Follow the same instructions as in 1 d)

Similarly, if a user clicks on the time or location a similar popup allows for editing the time or location.

Scenario #3:
Changing the date and/or time of a meeting from the Minutes in the Meeting Details/Attendance section (before it is called to order)



Go to the specific meeting - and in the Meeting Details/Attendance section, click in the Date and Time field.

A popup allows for the changing of the date and or the time following the instructions in 1 c)

Scenario #4: The meeting has been closed and I need to change the date and/or time

If the meeting has already been closed, the start date and/or time can still be changed as long as the minutes have not been approved.

Go the meeting minutes in question, go to Adjournment. Note the date and time the meeting was closed. Click on the orange button "Open Meeting".

Go to the Call to Order section. Click on the orange button "Change Date/Time. Follow the directions in 1 c).

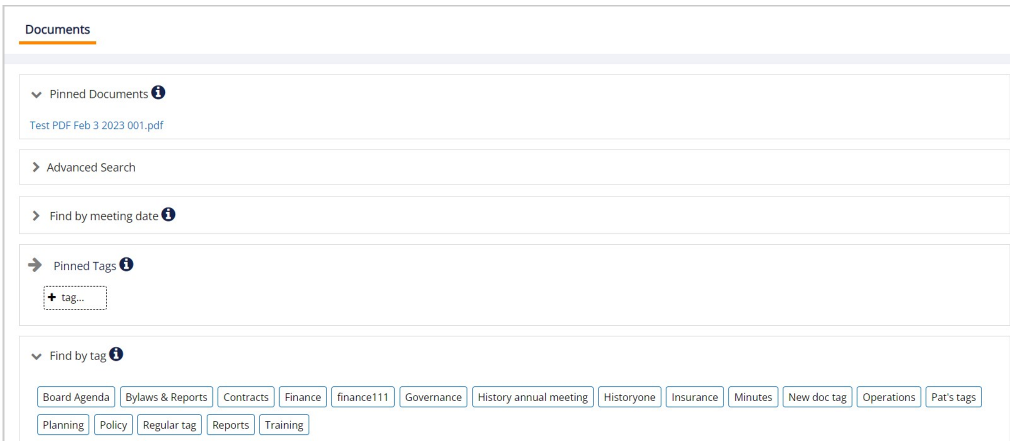
Lastly, make sure to go back to the Adjournment section and close the meeting using - "Set time manually" Be sure to enter the date and time that was noted earlier.

How to Find Documents (for Owners & Members)

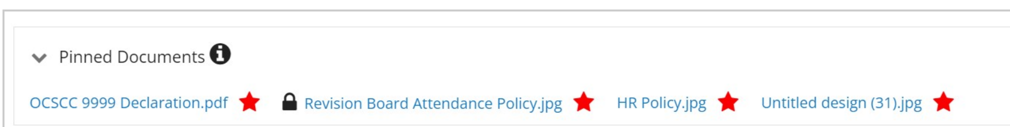
Created by Pat Crosscombe, Modified on Mon, 02 Oct 2023 at 01:51 PM by Pat Crosscombe

Click on an image to enlarge it.

Go to 



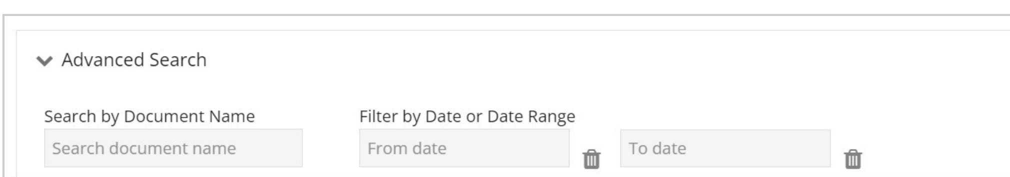
Pinned Documents



Boards will choose specific documents to pin to the top of the Documents page for ease of finding by others.

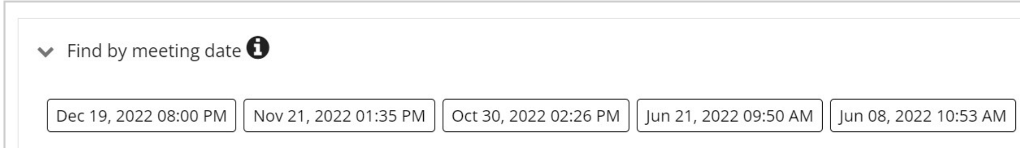
Advanced search

Search by document name or by a date range. Use the calendars to set dates.



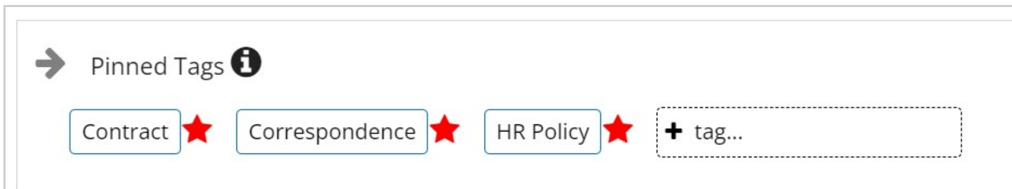
Find by Meeting Date

Meeting date tags are automatically created for new meetings. Clicking on a meeting date tag shows a list of documents that were added to that meeting.



Pinned Tags

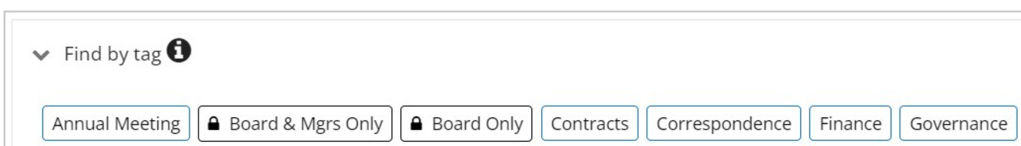
Each user can create their own pinned tags - for documents frequently accessed.



Pin tags by dragging a tag to

Unpin a tag by clicking on the

Tags organize documents.



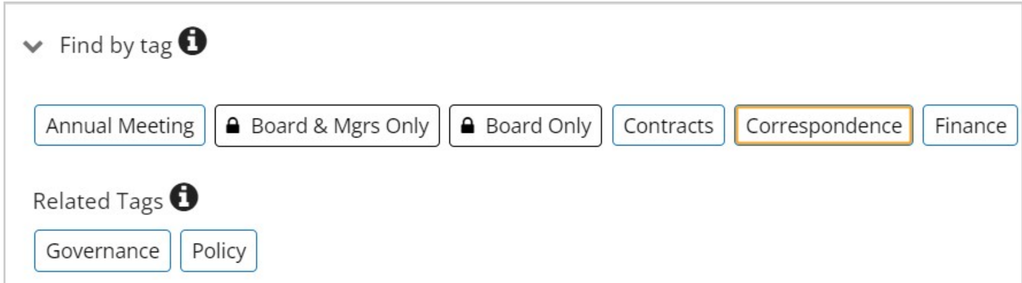
Click on any tag to find documents with that tag.

Clicking on additional tags filters (or narrows) the search results.

Clicking on a tag also shows related tags.

What are related tags?

Related tags are those tags associated with the tag clicked above - in this example when the Correspondence was clicked, an associated tag of Governance and Policy lets the user pick one to further narrow the search for a document.



Clicking on Reset removes all of the added filters.

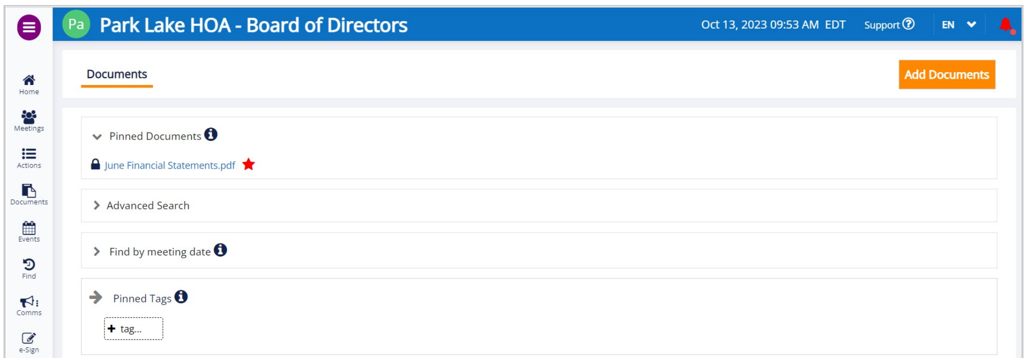
Create New Tags to add additional tags.

Updated October 2023 (Owners Help)

How to Find Documents

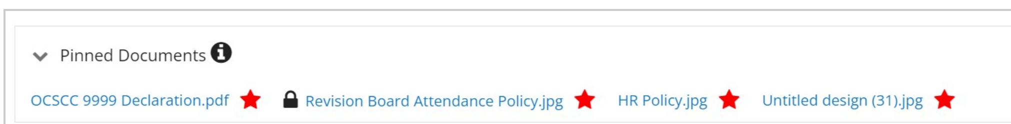
Created by Pat Crosscombe, Modified on Fri, 13 Oct 2023 at 09:54 AM by Pat Crosscombe

Go to 



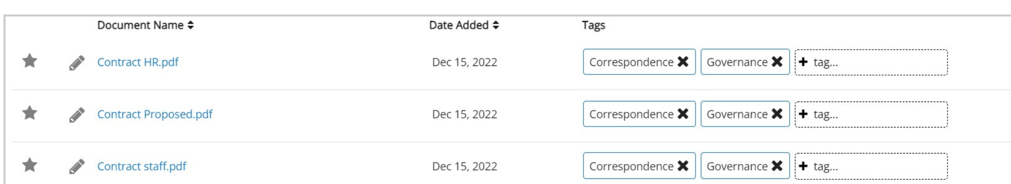
(Click on image to enlarge.)

Pinned Documents



Board Admins can choose specific documents to pin to the top of the Documents page for ease of finding by other users. To pin a document, scroll to table that includes document names.

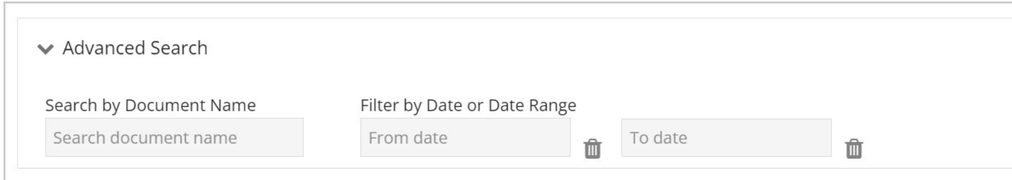
Click on the star - at the left-hand side of document name. This pins the document to the pinned document section. Unpin a document by clicking on the red star.



(Click on image to enlarge.)

Advanced search

Search by document name or by a date range. Use the calendars to set dates.

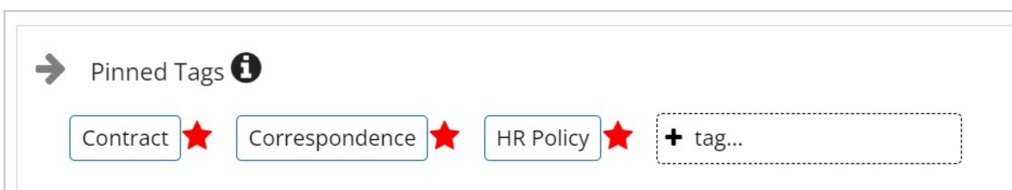


Find by Meeting Date

Meeting date tags are automatically created for new meetings. Clicking on a meeting date tag shows a list of documents that were added to that meeting.

Pinned Tags

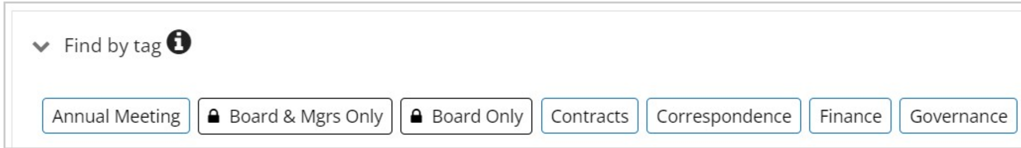
Each user can create their own pinned tags - for documents frequently accessed.



Pin tags by dragging a tag to

Unpin a tag by clicking on the

Tags organize documents.



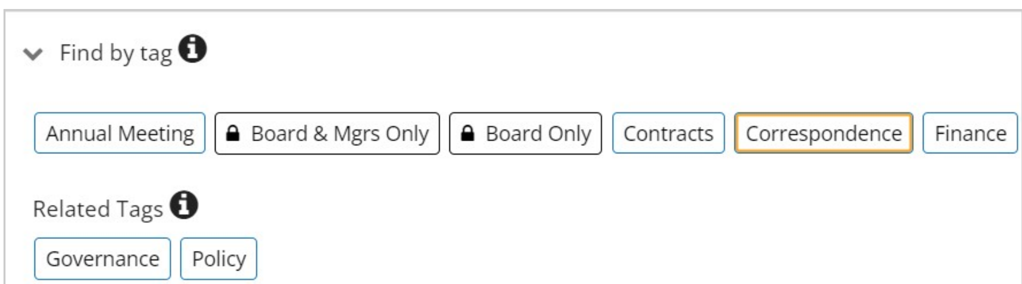
Click on any tag to find documents with that tag.

Clicking on additional tags filters (or narrows) the search results.

Clicking on a tag also shows related tags.

What are related tags?

Related tags are those tags associated with the tag clicked above - in this example when the Correspondence was clicked, an associated tag of Governance and Policy lets the user pick one to further narrow the search for a document.



Clicking on Reset removes all of the added filters.

Create New Tags to add additional tags.

Updated December 2022

How to Manage Tags

Created by Pat Crosscombe, Modified on Fri, 13 Oct 2023 at 10:14 AM by Pat Crosscombe

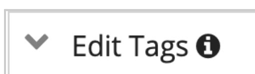
Super Admins and Board Admins can edit or merge tags.

This tutorial covers managing tags.

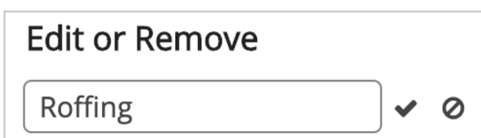
Once or twice a year it is a good idea to look over the tags and see if fine-tuning it needed. Are there tags with spelling mistakes or have several tags been created with similar names?

Go to Documents and Click on Tag Manager

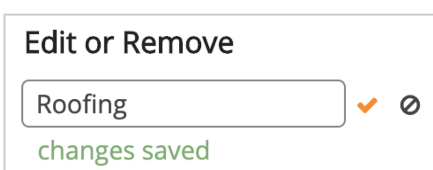
Fixing Spelling Mistakes

a) Go to 

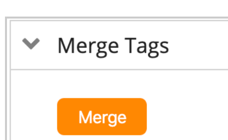
b) Click on the tag with a spelling mistake. A text box opens.



c) Click into the text box, fix the error and check the checkmark. The edited tag name is updated on all the documents with that tag.

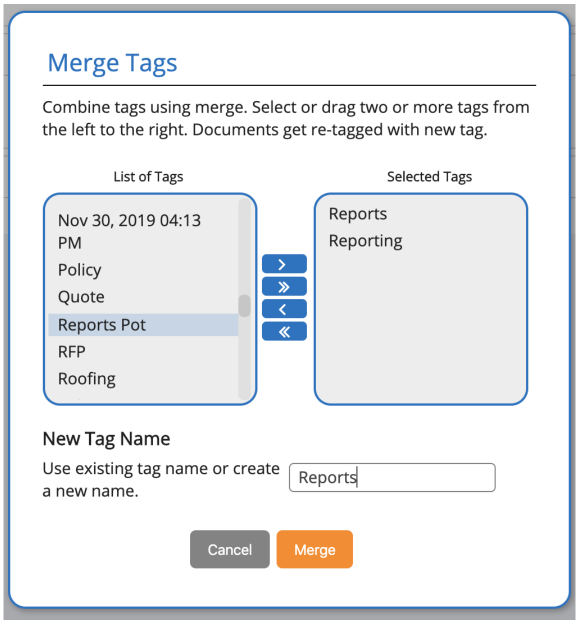


Merging tags

a) Click on 

b) Drag tags to merge from left to right. Any number of tags can be merged.

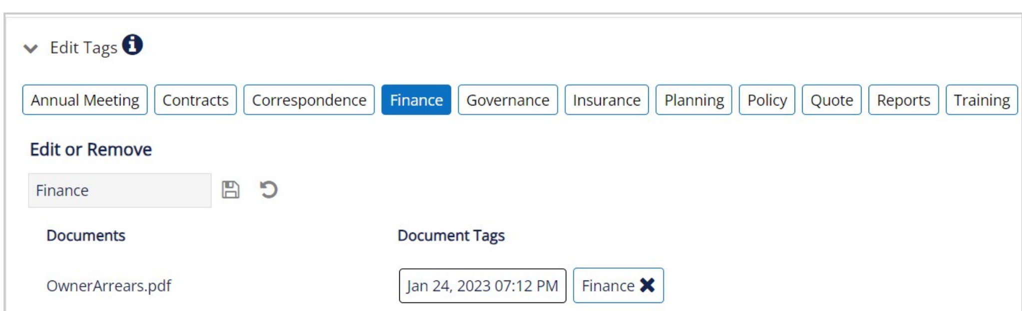
Add a new tag name. The tags are merged and documents are updated with the new tag name.



Deleting Tags

Tags cannot be deleted if the tag has been attached to any documents.

In the Edit Tag section



(click on the image to enlarge)

Click on a tag to see if documents are using that tag. In this example, Finance has been added to one document.

The finance tag can't be removed from the document until another tag - not a meeting date tag - has been added to it.

If not documents are using the tag, it can be deleted.

Updated October 2023

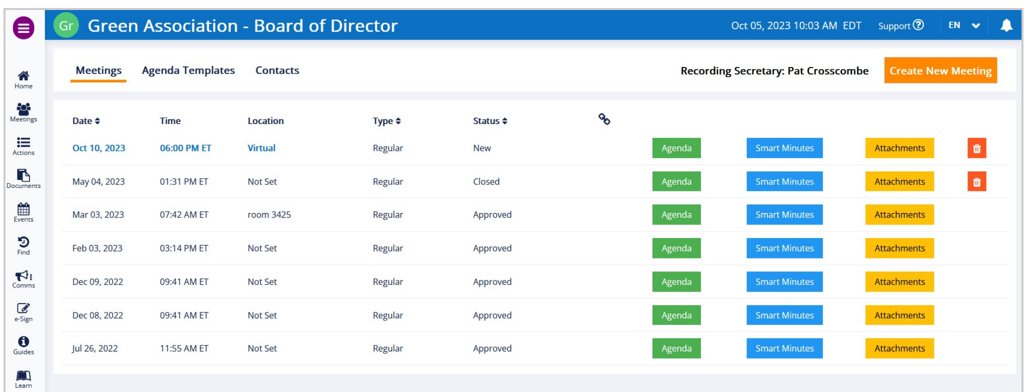
Working with Agenda Templates & Agendas

Created by Pat Crosscombe, Modified on Wed, 20 Dec 2023 at 08:41 AM by Pat Crosscombe

Who can create Agenda Templates?

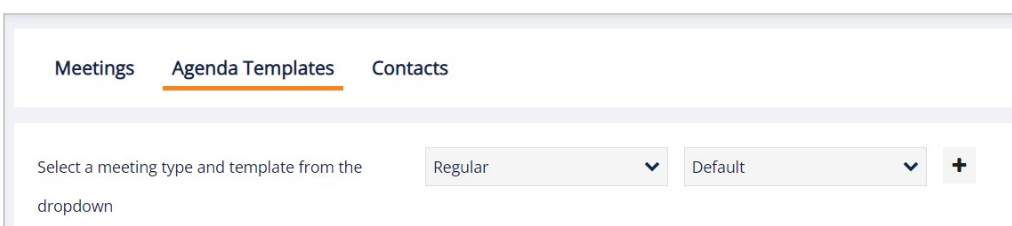
People with administrative privileges and recording secretaries can create and edit agenda templates.

1. From the meetings page - click on the **Agenda Templates** button.



(Click on the image to enlarge it.)

2. In the agenda templates area, Select a meeting type and template" from the drop-down.



Meeting types

Meeting Type	Description

Regular	These meetings are attended by the board's directors, officers, managers and staff. They are usually held on a monthly basis could also be held more or less frequently.
Meetings (without attendance)	Meetings that do not need attendance, use quorum, motions or need approval. of the minutes. Minutes can be locked and prevent further editing. This meeting type can be used to add minutes before the organization joined BoardSpace or used for short informal meetings.
Annual or Annual General	These meetings are held once per year and attended by the condo owners or nonprofit or association members as well as the board of directors. Some functions that are available for regular meetings are not available for this meeting type. This includes motions and the calculation of quorum.
Special	Special meetings are any meetings held during the year (other than the annual meeting) that are held for the owners or members. Some functions that are available for regular meetings are not available for this meeting type. This includes motions and the calculation of quorum. DO NOT USE for meetings where only the board of directors will be attending.

A default template is provided. Update the default template or create an additional template(s) for your organization.

Agenda Templates need to customized for each meeting. Any changes made to the agenda for a specific meeting are not saved unless the default template is updated.

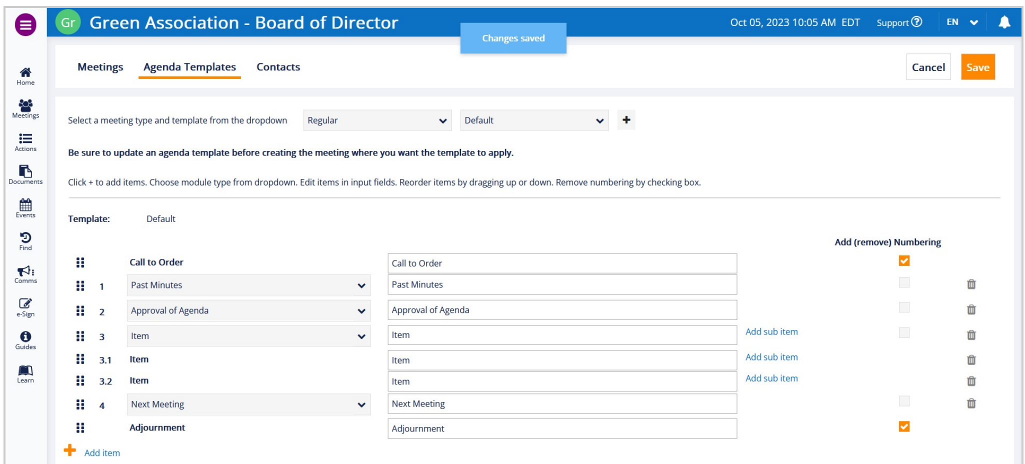
Note: A template must be created before a meeting is created if you want to use

that agenda template for that meeting.

More than one agenda template can be created. For example, if the board holds a meeting in between the monthly board meetings, for the purpose of discussing a single item, then a shorter and simpler agenda could be created.

3. How to create the default agenda

Click on the orange **+ add item** icon (bottom of page) to add a new template.



(Click on the image to enlarge it.)

The builder is a drag-and-drop tool.

Use the orange **+ Add item** to add items. Drag up and drop where needed. Agenda item numbering automatically updates.

Modules are added at the bottom and can be dragged into position. Numbering updates automatically.

Sub and sub-sub items can be added from the right-hand side "Add sub-item"

Module Type	Description
Call to Order	Call to order is required and is automatically added to every agenda.
Item	Adds items to agenda. Rename by editing in text box to the right. Add subitems by clicking on + sub item.

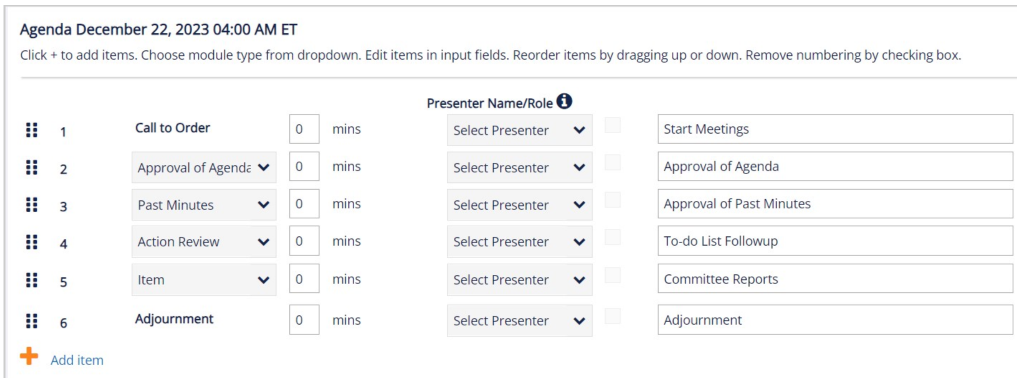
Agenda	Using this item adds the agenda to the beginning of the minutes.
Approval of Agenda	This module creates the motion to approve the agenda and includes a drop-down menu with the eligible voters. This makes is faster to approve the agenda since the motion is already prepared. If there are comments regarding the agenda, they can be added in the text box.
Past Minutes	Using this module approves any past minutes created using BoardSpace and converts them to a pdf that can't be edited. Any previous unapproved minutes will be added automatically. If using BoardSpace for the first time, the space is blank. Write in your motion to approve the minutes and the date of the meeting.
Action Review	This module pulls all of the board's ongoing actions into a list. Each action item is a live link so that if you hover over the action and click you go to the main action list and can see the details, add comments, postpone or complete the action.
Next Meeting	A popup allows for creating a next meeting that automatically is added to the the meeting list.
Ongoing Items	
Adjournment	Adjournment is required and added automatically to every agenda. Adding a second person for adjourning a meeting is optional.

More on module types

Modules can be renamed by editing the fields on the right-hand side.

See the following example.

- Call to order to Start Meetings.
- Past Minutes to Approval of Past Minutes.
- Action Review to To-do List Follow-up.
- Item - Committee Reports.



(Click on the image to enlarge it.)

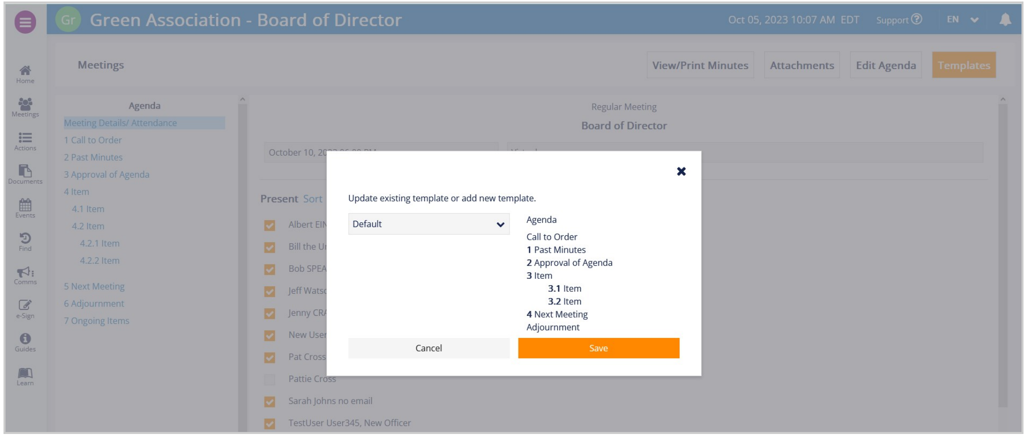
Remember to **"Save"**.

Agenda templates can be updated from the minutes or from the agenda (note - agenda templates and agenda are different.)

Updating an agenda template from a agenda.

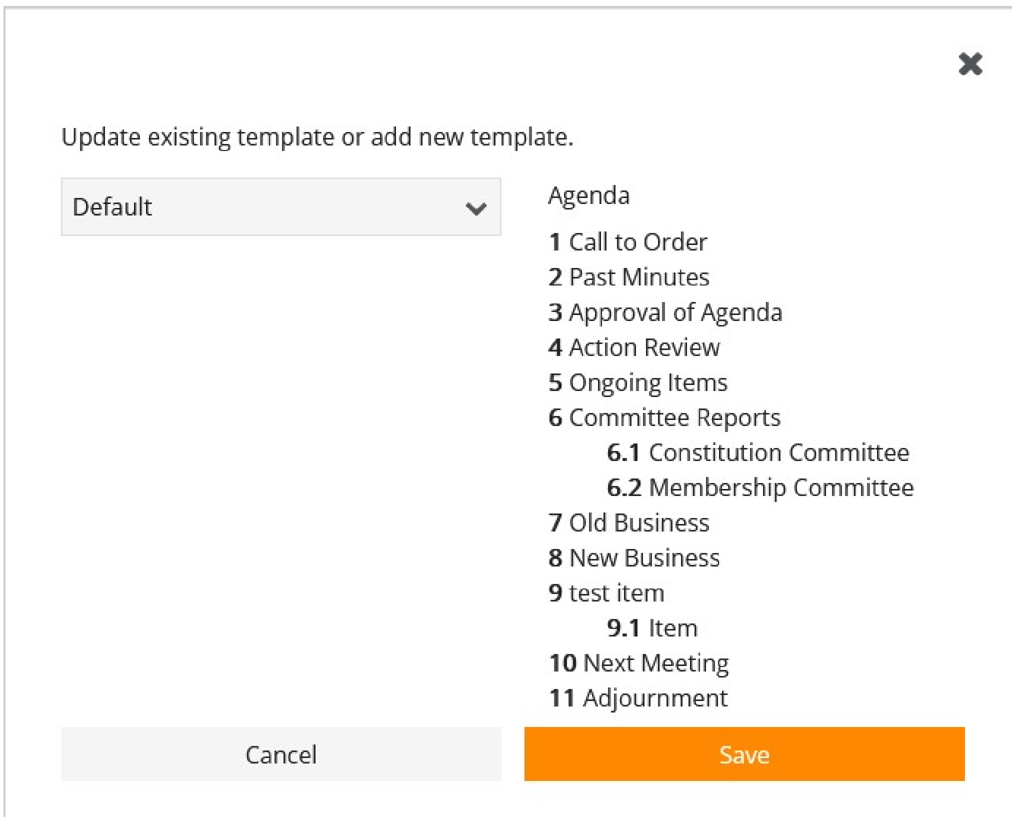
1. The default template was created and then applied to a meeting. In the process of preparing for the meeting, changes were made to the agenda that the secretary wanted to keep use in a subsequent meeting.

Click on **Templates**, select appropriate template from the drop-down menu and click Save to update the selected template.



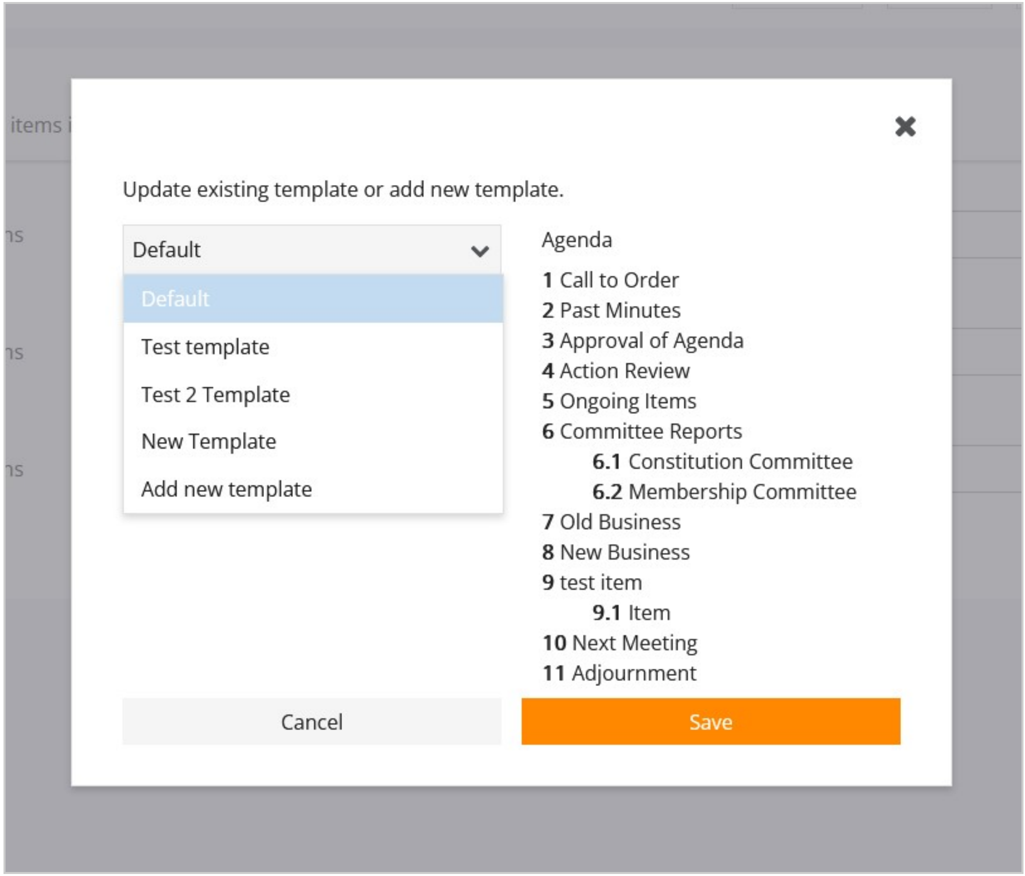
(Click on the image to enlarge it.)

Popup from above



(Click on the image to enlarge it.)

A new template could also be created as there is an option to Add new template



(Click on the image to enlarge it.)

Also, look at,

Using the Agenda Builder

Updated December 2023 (link to help & Guides)

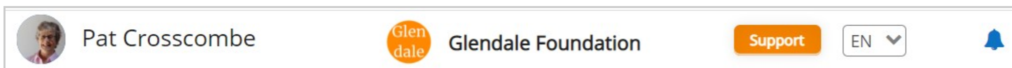
How to submit a support ticket

Created by Pat Crosscombe, Modified on Wed, 07 Dec 2022 at 10:26 AM by Pat Crosscombe

Where do I find support?

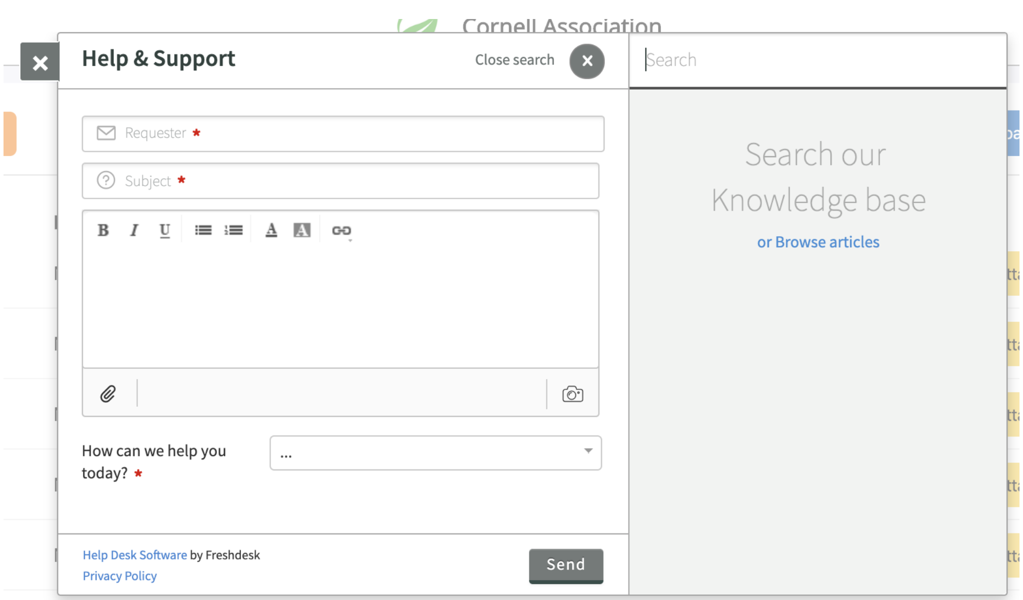
There are two ways of getting to support.

A) From the top menu on every page (orange Support button)

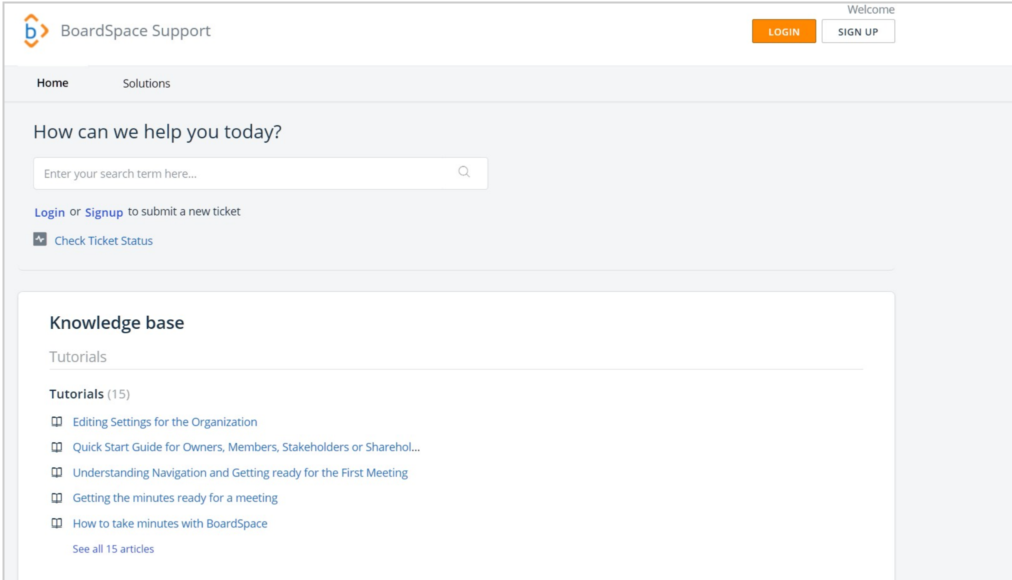


Accessing support here allows you to send a ticket directly and access FAQs.

Before submitting a ticket, check if the question has already been answered.



Enter a question under "How can we help you today?" will result in a list of potential answers. Click on the one that fits your question the best.


BoardSpace Support
Welcome
LOGIN
SIGN UP
Home
Solutions
How can we help you today?
Enter your search term here...
Login or Signup to submit a new ticket
Check Ticket Status
Knowledge base
Tutorials
Tutorials (15)
Editing Settings for the Organization
Quick Start Guide for Owners, Members, Stakeholders or Sharehol...
Understanding Navigation and Getting ready for the First Meeting
Getting the minutes ready for a meeting
How to take minutes with BoardSpace
See all 15 articles

How to take minutes with BoardSpace

Created by Pat Crosscombe, Modified on Thu, 15 Dec 2022 at 02:29 PM by Pat Crosscombe

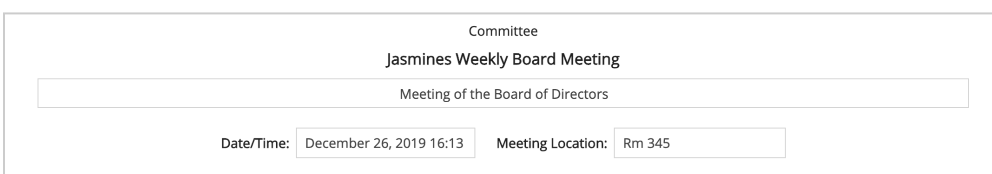
To begin the meeting.

1. Go To 

2. Click on Smart Minutes

Recording secretaries (RS) will see a view of the SMART minutes that allows for edits to be made to the minutes. If you are not currently the recording secretary but are a board admin you can make yourself the RS.
The recording secretary is the only person who can create and edit the minutes.

Only one user can be the RS at one time.

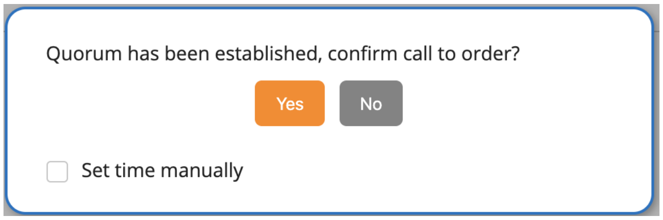


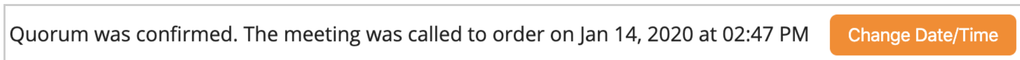
If you don't see a view like the image above, you are not the RS. To make yourself the RS, go to Board Settings from the top left-hand side drop-down menu and change the RS to yourself.

3. Take attendance by clicking on the Meeting Details section. Click Select All .

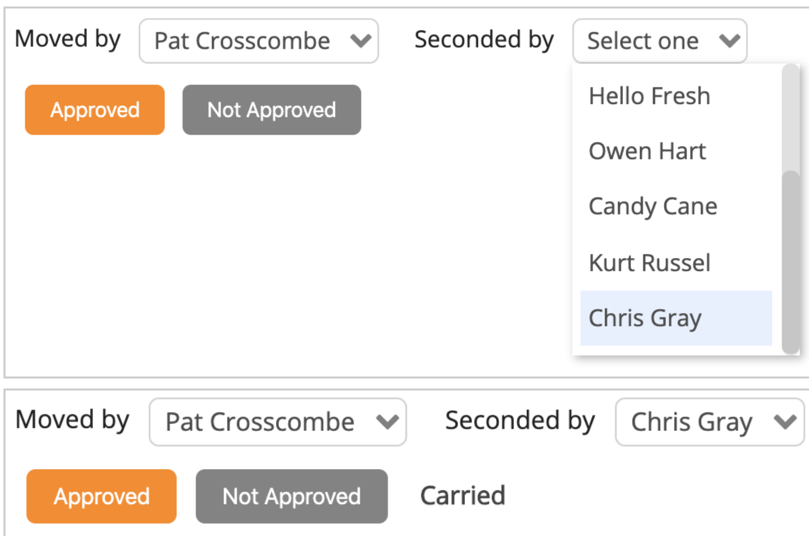
4. Go to the Call to Order section and click Call To Order .

4.1 Click Yes to confirm Call to Order or set the time manually by clicking the checkbox.

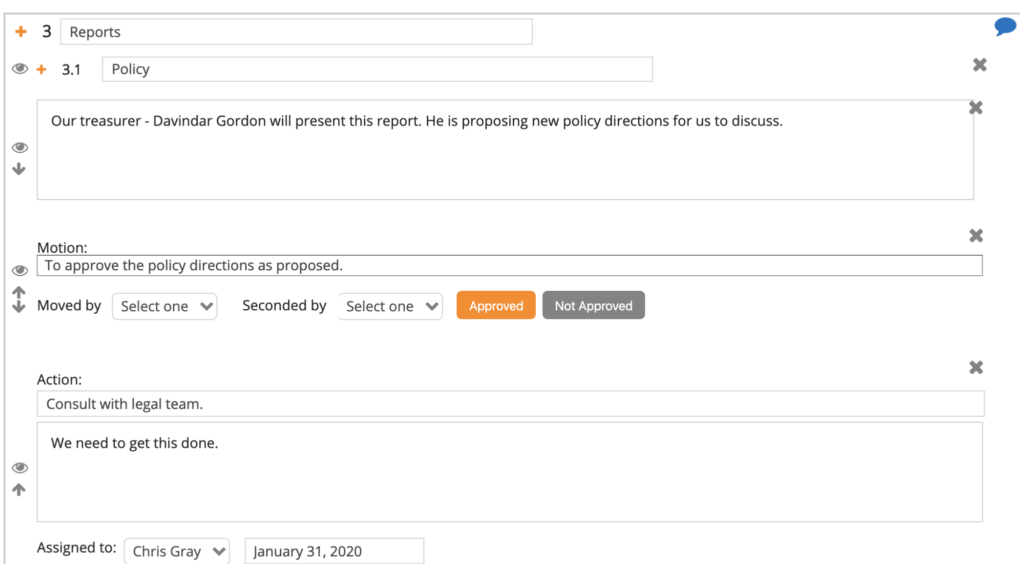




5. Approve the agenda, go to Approve Agenda and select directors from dropdown who move and second the motion to approve the agenda. Click approved.

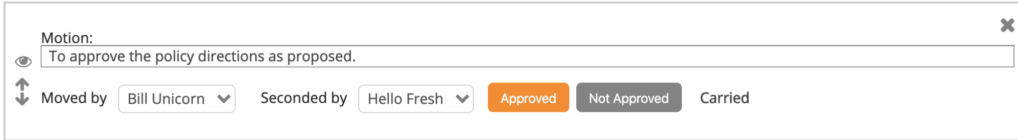


6. As the meeting progress, add additional text boxes, motions or actions. It is better is to add these items before the meeting starts.

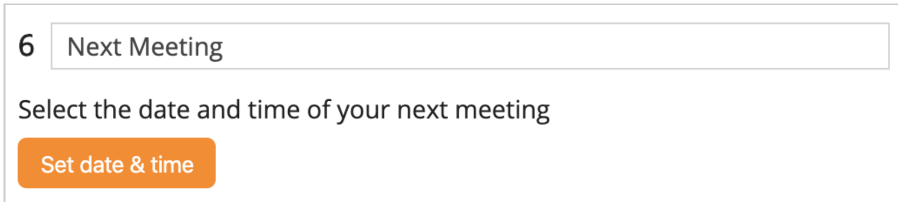


7. Approve motions. Choose from the drop-down directors who moves

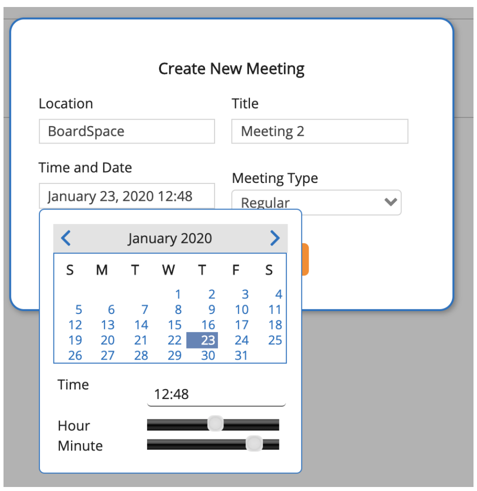
and seconds the motion.

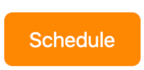


8. Select a Next Meeting date (if using this module). Set date & time.



Pick a date for the next meeting, choose a meeting type and add a title and location.



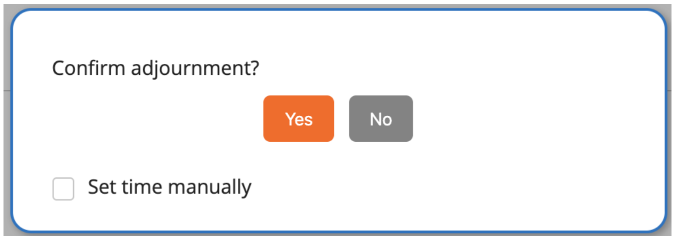
Click 

10. When the meeting is finished, go to Adjournment.

Pick from dropdown menus directors to move and second the motion to adjourn.	

The system takes the time and date from your computer or the time can be entered manually.

Confirm yes. The meeting is adjourned.



What are the blue bubbles?	

Click on the bubble - side panel opens - use to add comments or notes.

- Comments are public and seen by the board and managers.
- My notes are private and seen by the user only.

Add a comment or note by clicking on New Comment or New Note. Enter text and Add .

Editing Comments or Notes: click on pencil icon – make the changes – then Save .

Replying to Comments or Notes: Click on the symbol to reply.

Updated December 2022

How do I complete an ACTION? How do I undo a completed action?

Created by Pat Crosscombe, Modified on Thu, 19 Dec 2019 at 12:43 PM by Pat Crosscombe

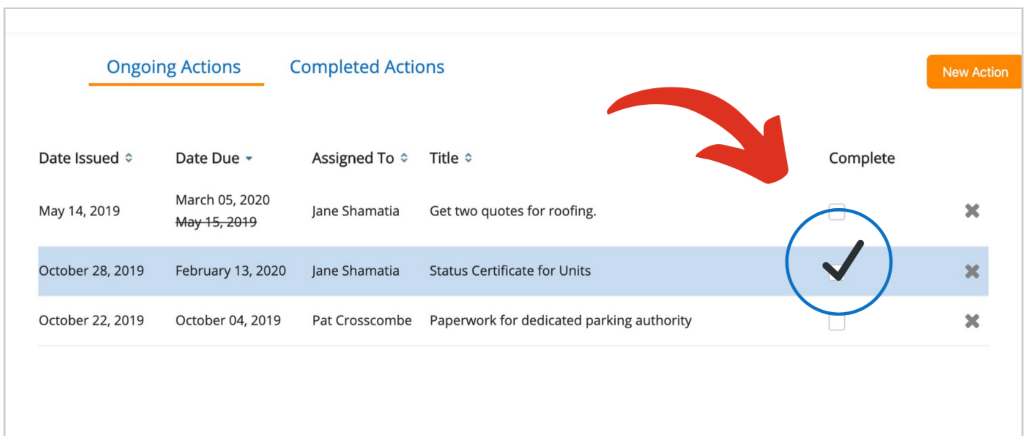
To complete an action, follow these steps:

Step 1

Go to the **Actions** tab

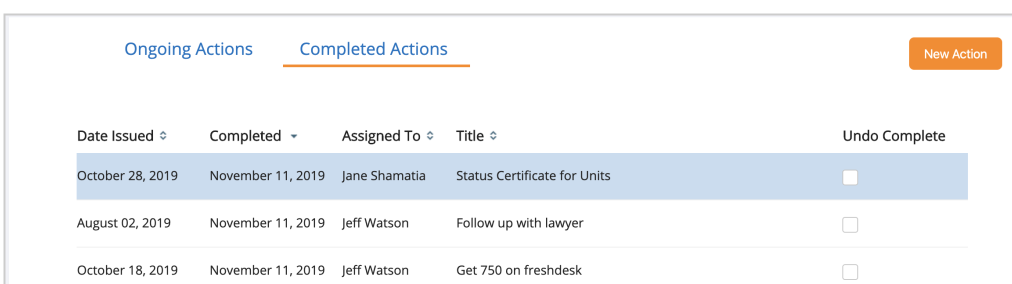
Step 2

Check the box under Complete for the specific action



Step 3

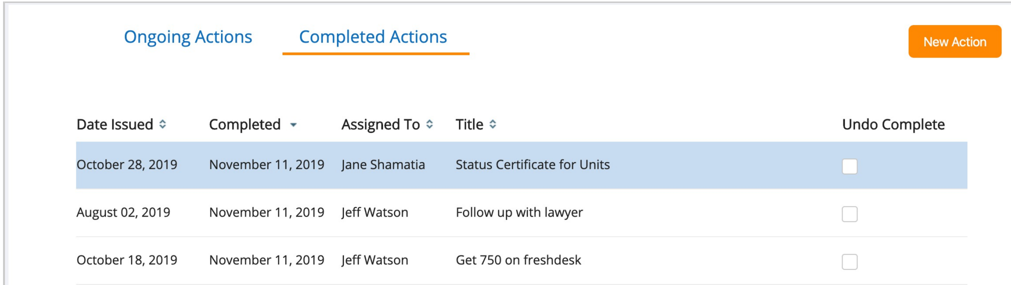
Click on **Completed Actions** to view the actions you have already completed



To undo a "completed" action, follow these steps:

Step 1

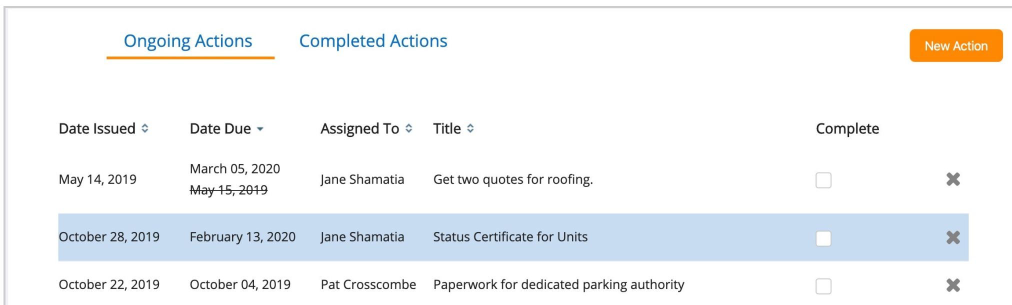
Go to the **Completed Actions** tab and check the box under the Undo Complete section.



Date Issued	Completed	Assigned To	Title	Undo Complete
October 28, 2019	November 11, 2019	Jane Shamatia	Status Certificate for Units	
August 02, 2019	November 11, 2019	Jeff Watson	Follow up with lawyer	
October 18, 2019	November 11, 2019	Jeff Watson	Get 750 on freshdesk	

Step 2

Click on the **Ongoing Actions** to view the actions that are currently ongoing.



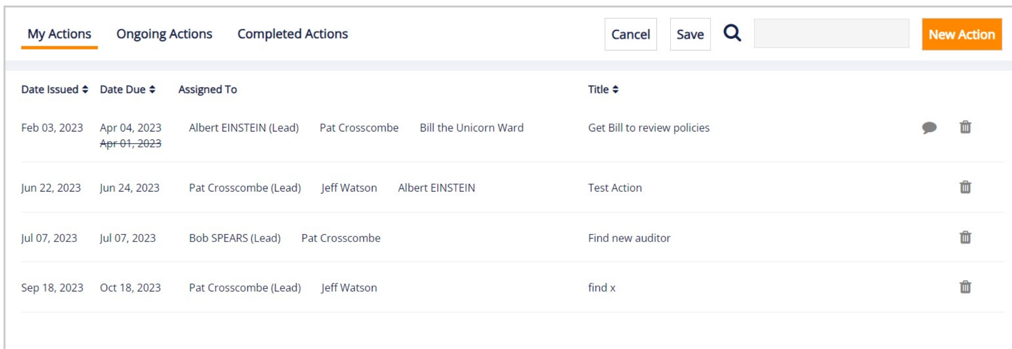
Date Issued	Date Due	Assigned To	Title	Complete
May 14, 2019	March 05, 2020 ~~May 15, 2019~~	Jane Shamatia	Get two quotes for roofing.	
October 28, 2019	February 13, 2020	Jane Shamatia	Status Certificate for Units	
October 22, 2019	October 04, 2019	Pat Crosscombe	Paperwork for dedicated parking authority	

How to Use Actions

Created by Pat Crosscombe, Modified on Fri, 13 Oct 2023 at 09:47 AM by Pat Crosscombe

This tutorial covers how to add, complete, edit and remove an action.

Actions are used to assign tasks to members of the board. A weekly email will be sent to the action owner reminding them of their outstanding actions.



(Click on image to enlarge.)

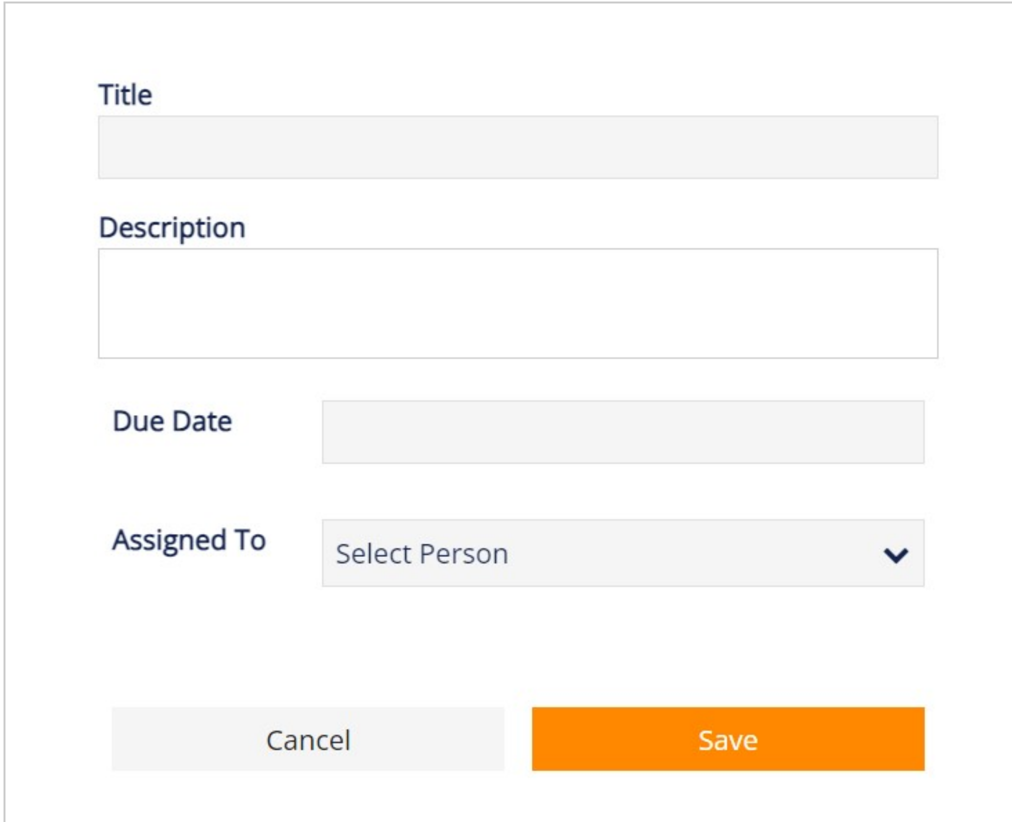
Go to 

1. How to add an Action

Click on 

Add the required information and Save.

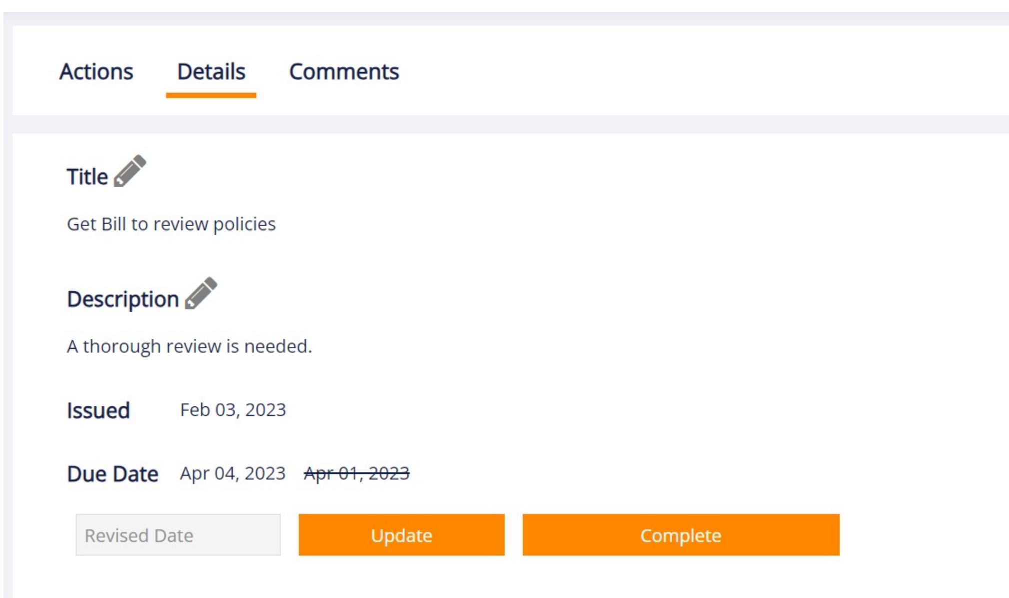
Actions can be assigned to more than one person. Keep assigned the action to additional people.
The first person added is the Lead. Leads manage the team.



2. How to mark an action completed or revise its Due Date.

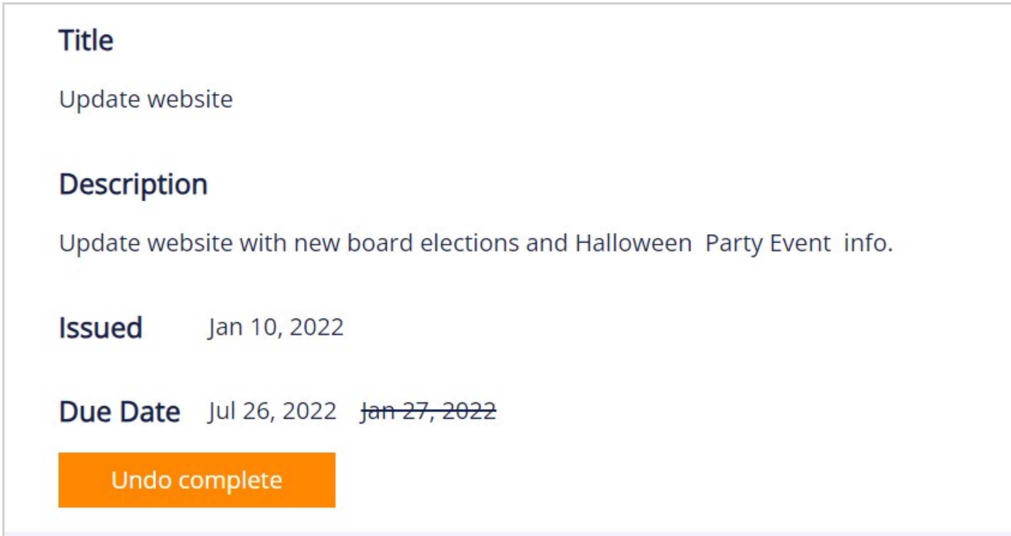
When the action is completed, click on Details, next click on Complete button. It will use current date for completion. If not the current date, click in field under Due Date and pick date from popup calendar.

If revising a due date, pick revised date from calendar and click on Update.



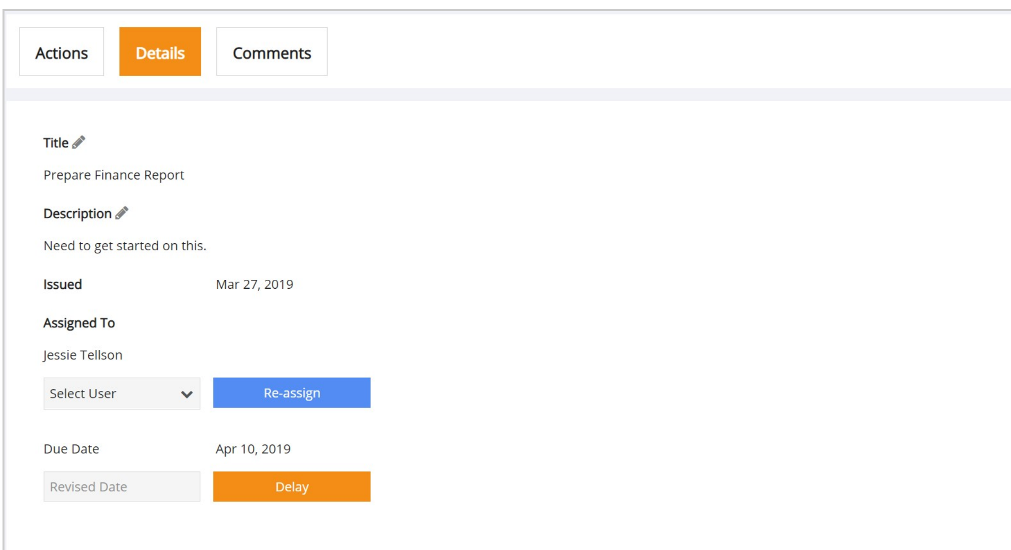
To undo the completion of an action go to Completed Actions.

Click on Undo complete and revise the due date.

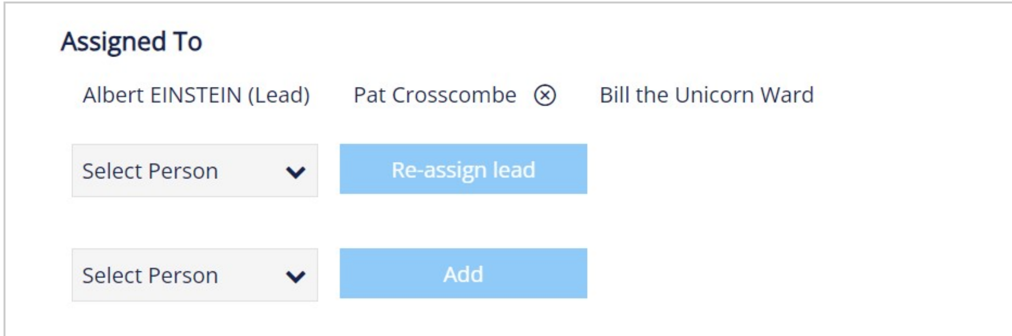


3. Edit an Action

Click on the pencil icons to edit Title or Description.

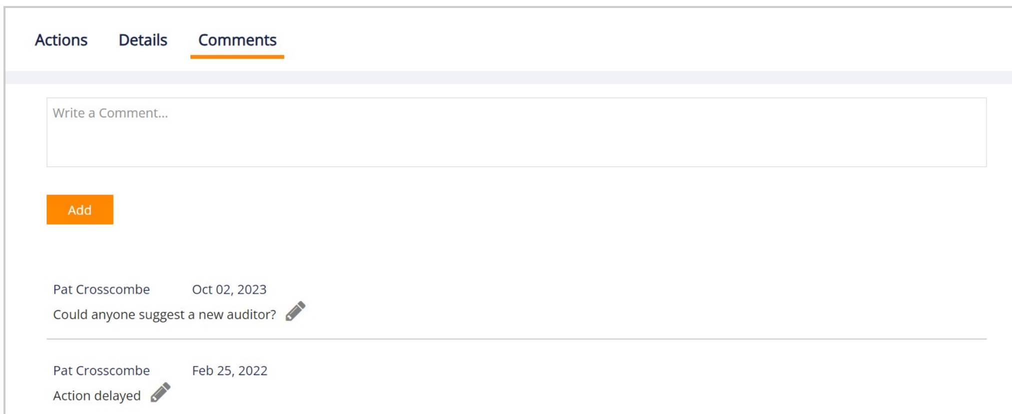


To reassign an action select a new user from the dropdown and click Re-assign.



4. Add Comments

Add text and click Add.



5. Delete an Action

Actions can be removed by clicking on the and clicking Yes for the confirm dialogue.
Completed actions cannot be deleted.

Updated October 2023 (linked to Help)

How To Use BoardSpace

Created by Jasmine Vary, Modified on Tue, 21 Jan 2020 at 12:17 PM by Jasmine Vary

Super Admins

First Steps in Setting Up BoardSpace
This tutorial will go over the basics of getting started using BoardSpace.

Learn about menus, create a meeting, set up an agenda template, add documents
In this tutorial, you will learn what each menu item means and how to create your first meeting. As well as how to set up an agenda template and add documents.

How to Get Your Minutes Ready
In this tutorial, you will learn how to get your minutes prepared for a meeting by learning how to use each module and figuring out what they mean. You will also learn how to add to your attendance and send a notification out that the meeting is ready.

How to Take Minutes During a Meeting
This guide will show you how to take minutes during a meeting. Beginning by calling your meeting to order, then adding and approving motions and actions. As well as how to use comment bubbles and the process of adjourning your meeting.

How to Add a Manager to a Board
This tutorial covers the steps for adding a manager and assigning them to a board.

How to Use Planner
This tutorial will explain how to use the Planner. Including how to add, edit and delete an event. As well as how to add the event to a meeting.

How to Use Find
This tutorial will explain how to use Find and what the differences are between the two sub-sections Activity Log and History.

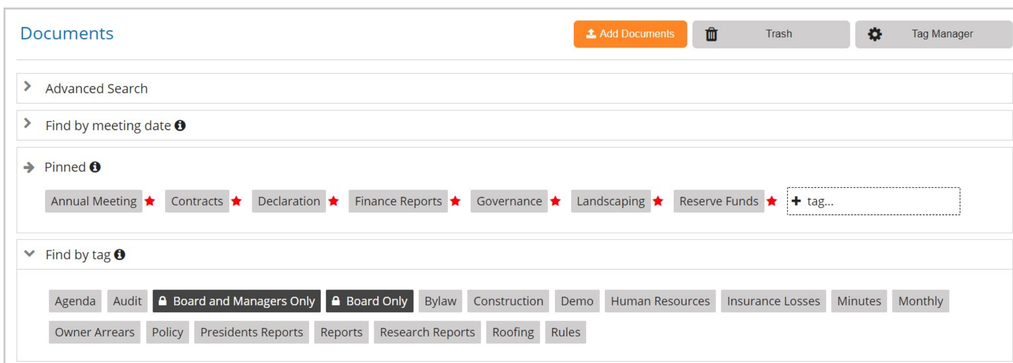
How to use pinned tags

Created by Pat Crosscombe, Modified on Wed, 20 May 2020 at 11:13 AM by Pat Crosscombe

Pinning tags lets users create a CUSTOM way to organize access to Documents

Pinned tags are FAT "frequently accessed tags. Each user creates their own FATs.

The tag library is organized by the board admins, but each user creates their own FATs.



Go to Documents.

Drag a tag to the pinned tag section. Remove a pinned tag by clicking on the red star.

Remember - each user creates their own pinned tags.

The tag library is created by the board admins and is the same library for every user.

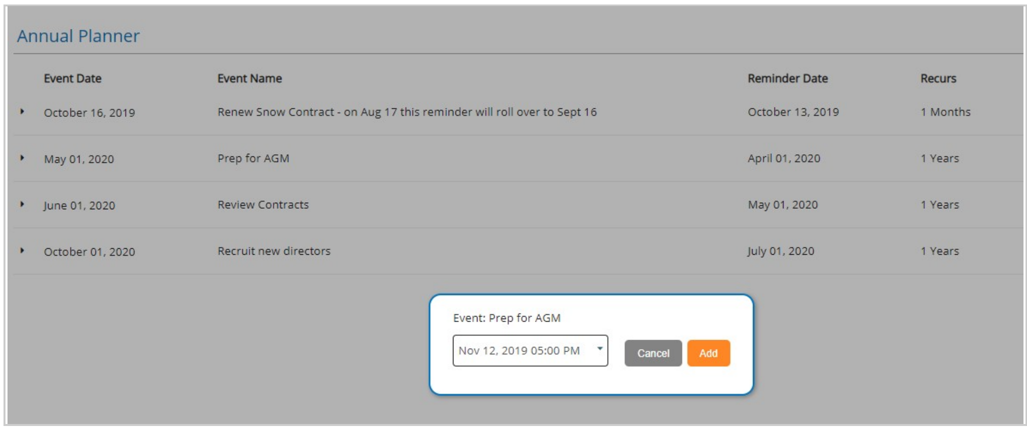
How to use the Ongoing Agenda Module

Created by Pat Crosscombe, Modified on Thu, 18 Mar 2021 at 02:00 PM by Pat Crosscombe

Ongoing

There are two ways of using ongoing items.

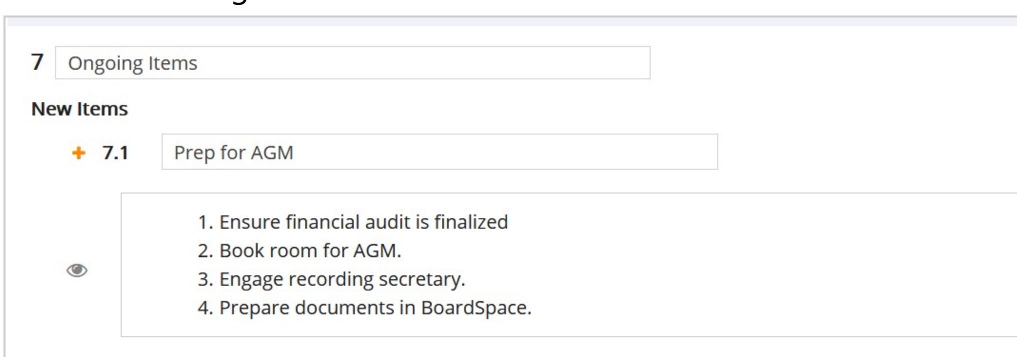
a) Planner Items



When it comes time to discuss an Event at a meeting it can be added by clicking on the button "Add Event to meeting" and selecting the meeting date from the drop-down list.

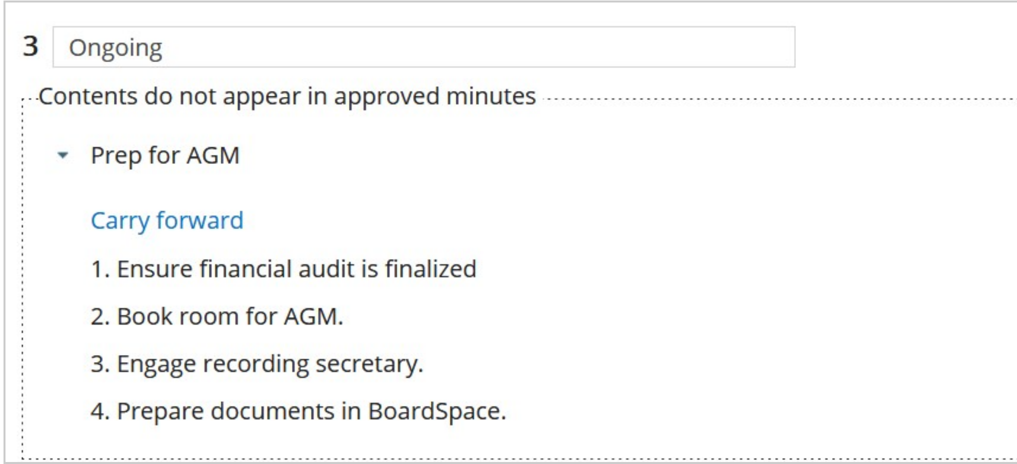
An Ongoing agenda item is automatically added to your agenda and populated with the selected Event.

In the screenshot below, the Prep for AGM event has been added to the Oct 15th meeting as 7.1

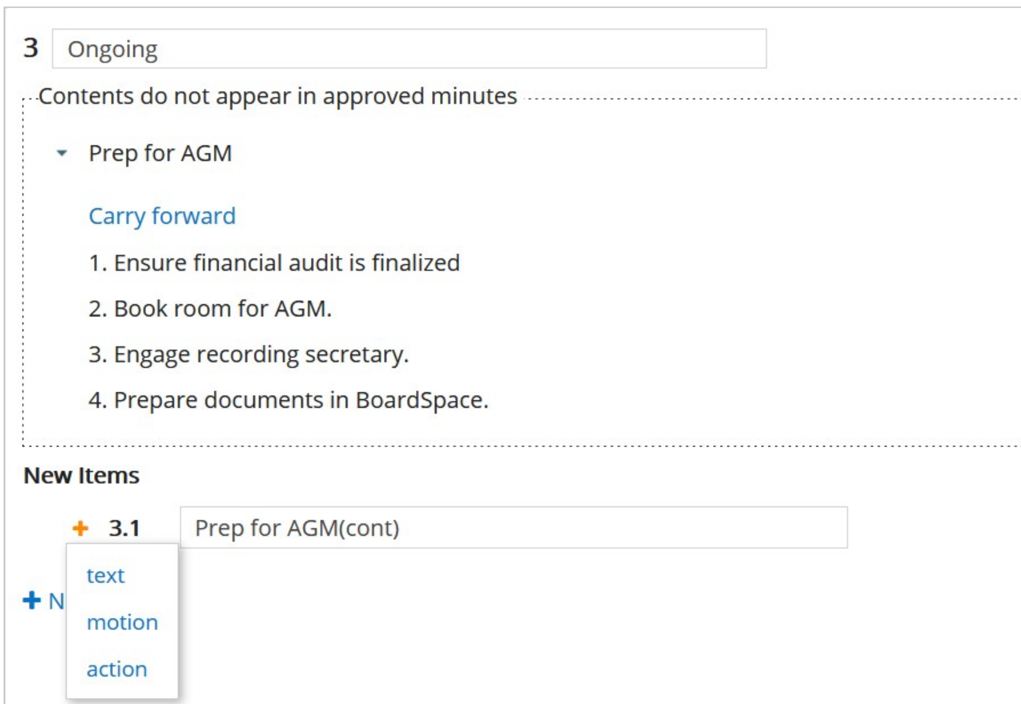


A text box, motion, or action can be added to the Prep for AGM event.

In the next meeting subsequent to the Oct 15th meeting, add the ongoing module and note that the "Prep for AGM" event is present in the minutes in a special section as shown below.

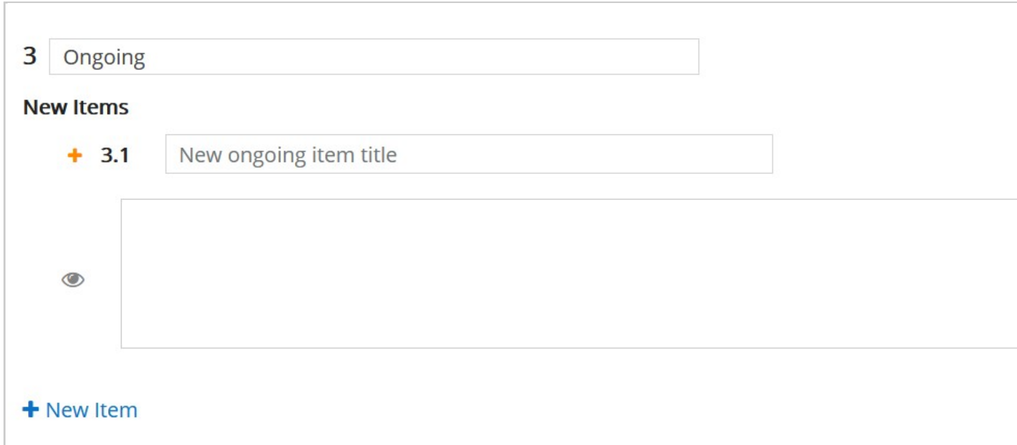


If needed, the Prep for AGM event can be discussed at a 2nd meeting. Click on Carry forward. The Prep for AGM shows up as item 3.1 with (cont) after the title. A text, motion or action can be added. An item can be carried forward as long as needed.



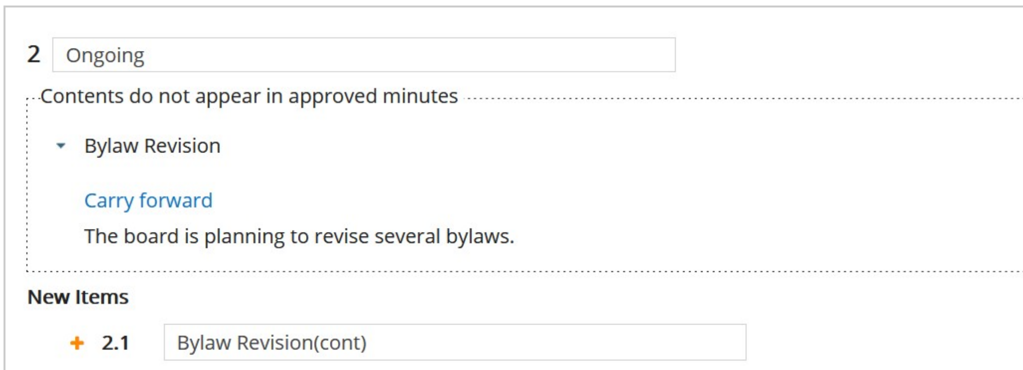
b) Items that will remain on the agenda for more than one meeting.

Add the Ongoing module to the agenda. Click on +New Item. This added 3.1 Add a motion or action as needed.



The following month add the ongoing module. Item 3.1 will show up.

To include the item in the minutes click on Carry forward



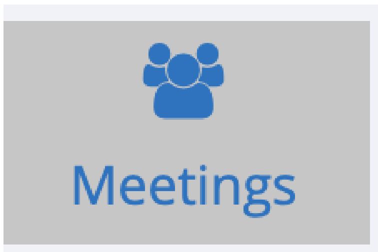
The item Bylaw Revision has been added as 2.1.

I have to open up the meeting again. Do I get the option to manually set the meeting close date/time?

Created by Jasmine Vary, Modified on Tue, 12 Nov 2019 at 11:13 AM by Jasmine Vary

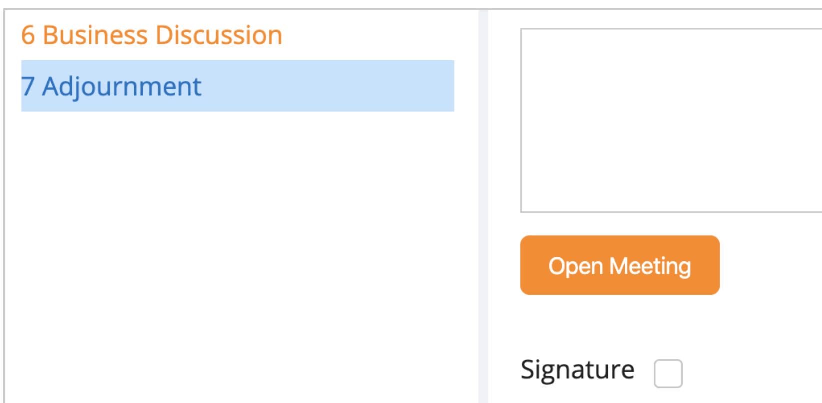
Step 1

Go to Meetings



Step 2

Click on "Open meeting".

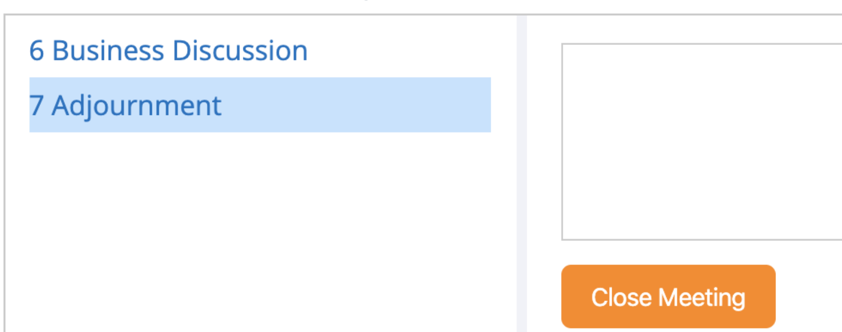


Step 3

Do any changes you need to do

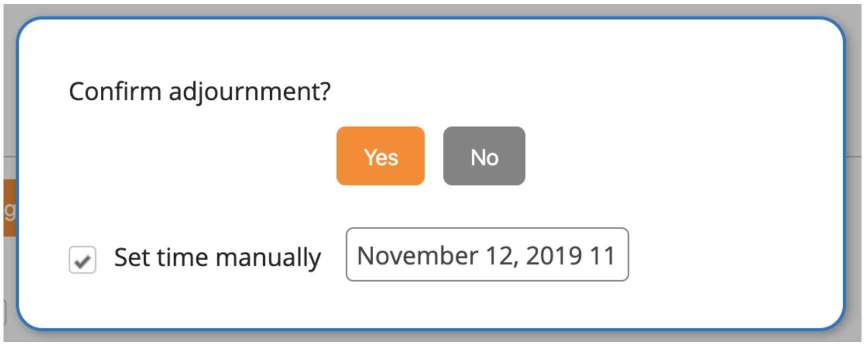
Step 4

Click on the Close meeting.



Step 5

In the popup - make sure to check - Set time manually and fill out the preferred date and time.



I want to add Joe to a committee but he is not a director on the board.

Created by Pat Crosscombe, Modified on Fri, 08 Nov 2019 at 12:19 PM by Jasmine Vary

I'm trying to add Joe to the HR Committee but I'm not certain what role I should assign Joe because he is not a director on the board.

I want Joe to be able to access minutes and documents for that committee only and NOT be able to access the records of any other committee or of the board of directors.

Add Joe as a director to the HR Committee. In this situation, it does not mean that Joe is a director on the board but it does mean that Joe will be able to access all of the records for the HR Committee, vote on motions, be assigned actions, see events, and find records.

Also, see

If a document has been attached to one set of minutes, can you attach it to another set of minutes, or do you have to “delete” it from the first meeting?

Created by Jasmine Vary, Modified on Mon, 13 Jan 2020 at 12:08 PM by Jasmine Vary

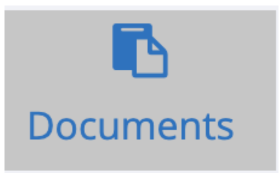
No, it does not need to be removed from a previous meeting. If you want to add a document to a 2nd meeting,

Step 1

Create the meeting

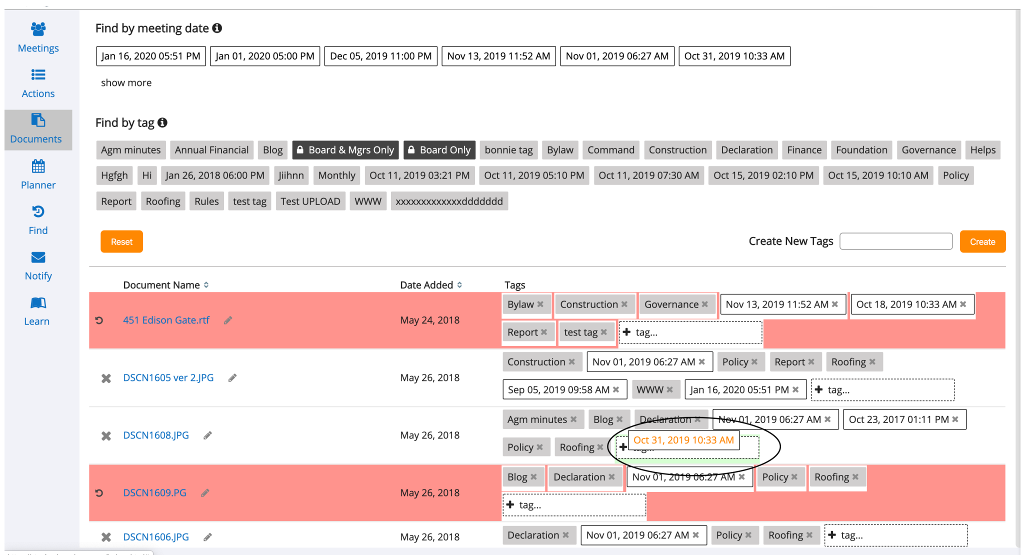
Step 2

Go to documents



Step 3

Drag the 2nd meeting date tag to the appropriate document



Is there a free trial?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 11:49 AM by Pat Crosscombe

No, we do not offer free trials.

Please sign up for a free demo, go to Free Demo

Updated October 2023

Is there a way to assign an action to more than one person?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 12:39 PM by Pat Crosscombe

Yes, actions can be assigned to a team of people. One person is assigned as the lead. Each member of the team can be assigned a specific task with a specific due date.

For more information about actions, **click here.**

Reviewed October 2023

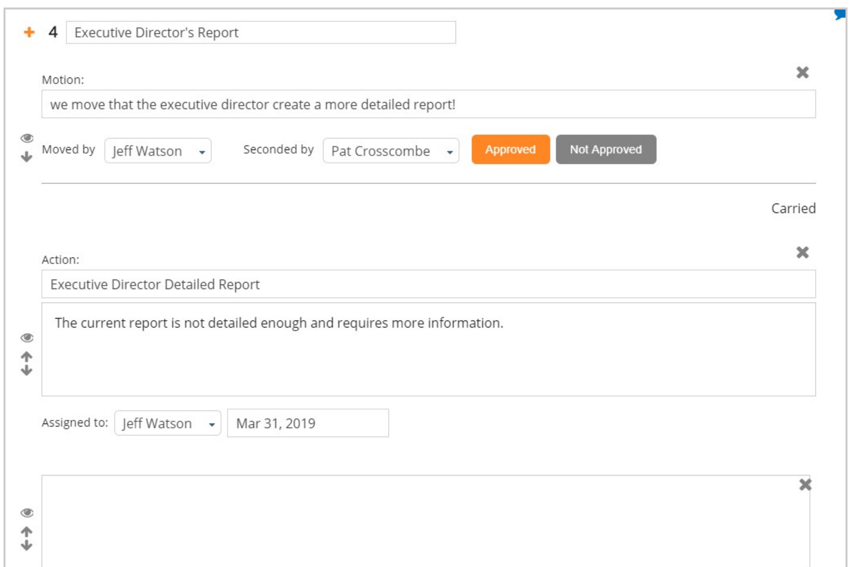
Is there a way to reorder or move the items in the agenda?

Created by Pat Crosscombe, Modified on Fri, 08 Nov 2019 at 04:14 PM by Jasmine Vary

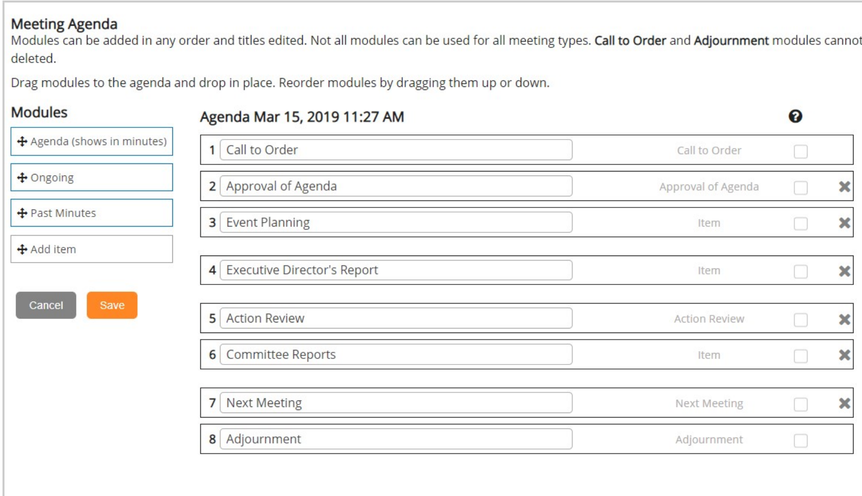
Yes, there is.

There are two options:

Option 1
Are you trying to reorder motions and actions and text? If so use the up or down arrow on the left-hand side.



Option 2
If you want to re-order the agenda items, go to the edit agenda and drag the item up or down.


Meeting Agenda
Modules can be added in any order and titles edited. Not all modules can be used for all meeting types. Call to Order and Adjournment modules cannot
deleted.
Drag modules to the agenda and drop in place. Reorder modules by dragging them up or down.
Modules
Agenda (shows in minutes)
Ongoing
Past Minutes
Add item
Cancel
Save
Agenda Mar 15, 2019 11:27 AM
1 Call to Order
Call to Order
2 Approval of Agenda
Approval of Agenda
3 Event Planning
Item
4 Executive Director's Report
Item
5 Action Review
Action Review
6 Committee Reports
Item
7 Next Meeting
Next Meeting
8 Adjournment
Adjournment

More about adding People and Positions

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 11:57 AM by Pat Crosscombe

Adding a new person

Emails are automatically sent to new users with instructions on how to create their accounts.

Changing people's Email Address

If

The user has not set up their account - verify by seeing comments like this below their details indicate

Last login	never	Status	**Email sent** Resend email

Then

Their email address can be updated by editing the email address field and then clicking Save. An email will automatically be sent to the updated email address with instructions on how to create their account.

If

If the person has a status of Active, then changing their email address asks by email the person to verify the new address. Once verified the person can log in with the new email address and continue to use their current password.

Last login	Feb 02, 2022	Status	**Active**

One of the new people just added said that no email was received.

Our emails sometimes end up in spam. Admins will see account status like below. Clicking on "resend email" will send the email inviting a person to create their account.

Last login	never	Status	**Email sent** Resend email

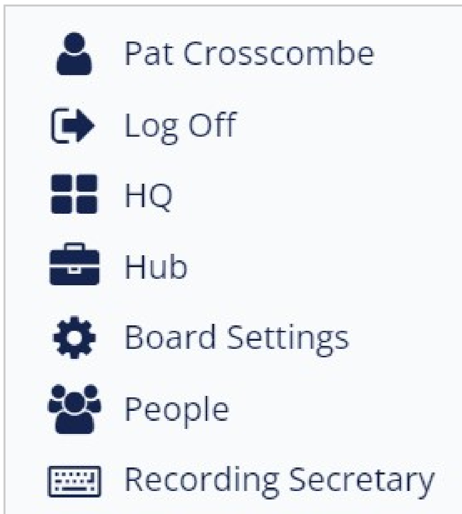
My name is spelled wrong. How can I fix it?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 09:04 AM by Pat Crosscombe

Users can edit their own information.

Step 1

Go to profile - Click on your name in the drop down menu



Step 2
Edit the information

Step 3
Click Save.

Updated October 2023 (FAQ)

Recording Secretary

Created by Pat Crosscombe, Modified on Tue, 15 Oct 2019 at 09:50 AM by Pat Crosscombe

The recording secretary is the BoardSpace user who is able to create agendas, create draft minutes, take the minutes, and add documents to specific agenda items.

It is each to change recording secretaries. And user who is a board admin can make the change by going to Board Settings - Recording Secretary - selecting a user from list or adding a new user.

Questions about Documents

Created by Pat Crosscombe, Modified on Wed, 06 Dec 2023 at 03:07 PM by Pat Crosscombe

1. Can documents be renamed in the Document List or after they have been attached to a meeting?

Yes, a document can be renamed, but only in the 6 months after it has been added. Any changes to a documents name will populate everywhere. This means that a document that has been linked to a meeting will be updated automatically.

2. Can a document that has been attached to one set of minutes be linked to to another set of minutes, or do you have to “delete” it from the first meeting?

Documents can be linked to any number of meetings. They do not need to be "deleted." Remember, the document is saved in the system once. It is then linked to any number of other meetings, but it does not mean that the document has been duplicated.

3. Can Meeting date tags be removed from a document after the meeting is approved.

No, they can't. The document was provided to a meeting, removing it after the meeting has been approved would not be good practice.

4. Are documents attached to the agenda or the minutes.

Documents are linked to the agenda and minutes. They can be seen in a list, in the agenda, and in the minutes.

5. How to comment on Agenda items.

All comments are added in one place via the Comments button or the chat bubble on your phone.

6. What is in a Notifications?

The notifications do not include any attachments. It is simply an email that says the Agenda is ready for review or the Minutes are ready for review.

Directors see everything that a recording secretary does, except that they can't edit the agenda or the minutes. They will see anything added to text boxes in the SMART minutes (but can't edit them). They see the attached documents. They can attach documents but can't add to an agenda item.
They can look at the comments - which everyone can view, but not My notes which are private to the specific user who created them.

Updated December2023

Quick Start Guide for Owners, Members, Stakeholders or Shareholders

Created by Pat Crosscombe, Modified on Wed, 22 Jul 2020 at 04:34 PM by Pat Crosscombe

Click on the link below to get started learning more about using BoardSpace as an owner, member, stakeholder or shareholder.

Link to Quick Start Guide for Owners/ Members/ Stakeholders

Submitting Tickets: What do I need to tell support?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 12:42 PM by Pat Crosscombe

Users can submit support questions about password or login problems, getting help, reporting a bug or suggesting a feature.

Password or Login Problems
If this ticket is about passwords, check here.

Get Help/Report a Bug
It is critical that you provide enough information so that we can clearly understand your problem. Please attach screenshots and describe what steps you took so that we can replicate and help fix the issue.

Suggest a Feature
We want to know your ideas for new features or modifications to existing features. Describe what you would like to see and how you think it could improve the app and we will look it over and keep you updated.

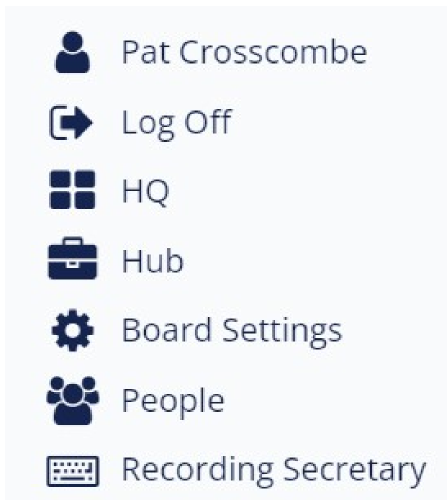
Always add a screen shot if possible.

Reviewed October 2023

Several directors told me their names are spelled wrong. How can I fix them?

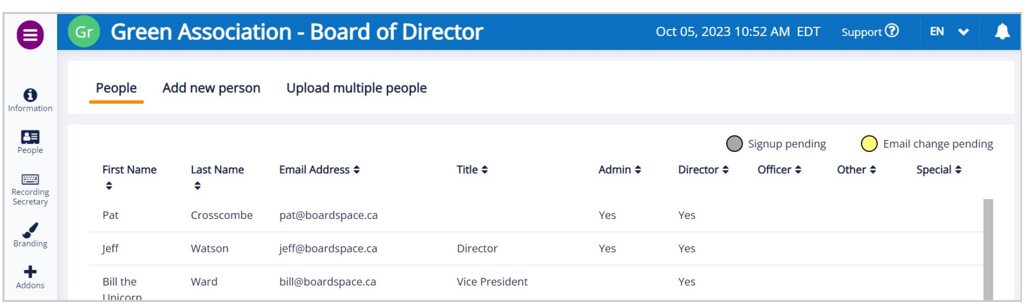
Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 12:17 PM by Pat Crosscombe

Step 1

Go Drop Down Menu	
Click on People	

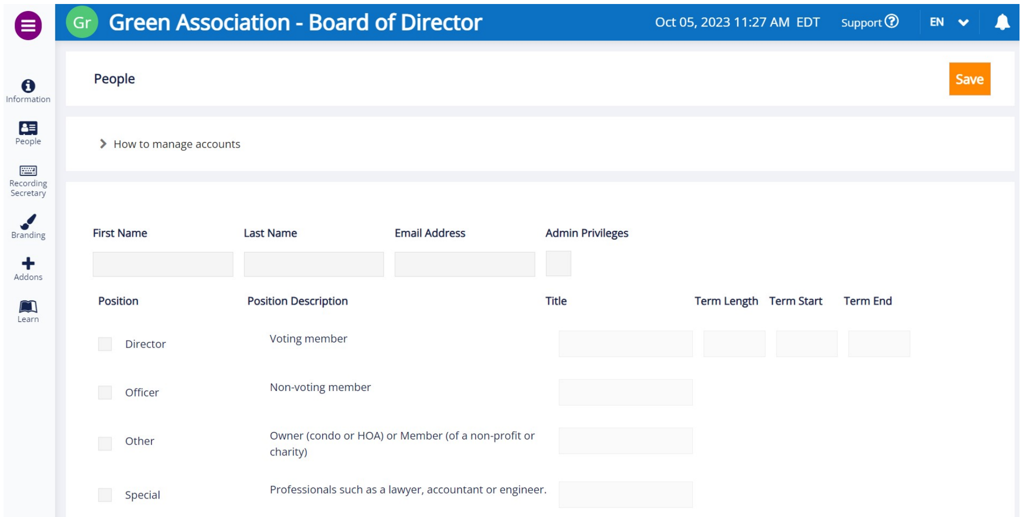
Step 2

Go to **Manage Users** and click on the member whose name is spelled wrong



Step 3

Edit the fields as desired to change the name



Click Save.

Any other person can be edited the same way.

Updated October 2023

Using LiveDocs (beta)

Created by Pat Crosscombe, Modified on Wed, 02 Aug 2023 at 10:23 AM by Pat Crosscombe

LiveDocs is our new collaborative editing tool. It's a bit like editing in Google docs but not quite the same.

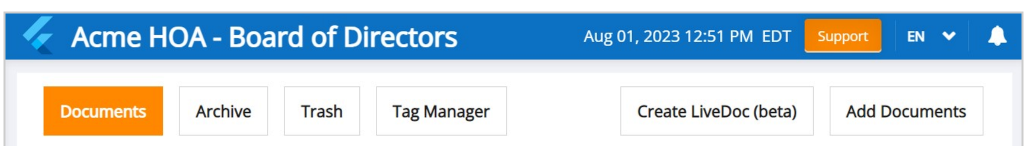
We released it in beta because we wanted to get user feedback before working further on its development.

We know its not perfect, your feedback will help us make it better.

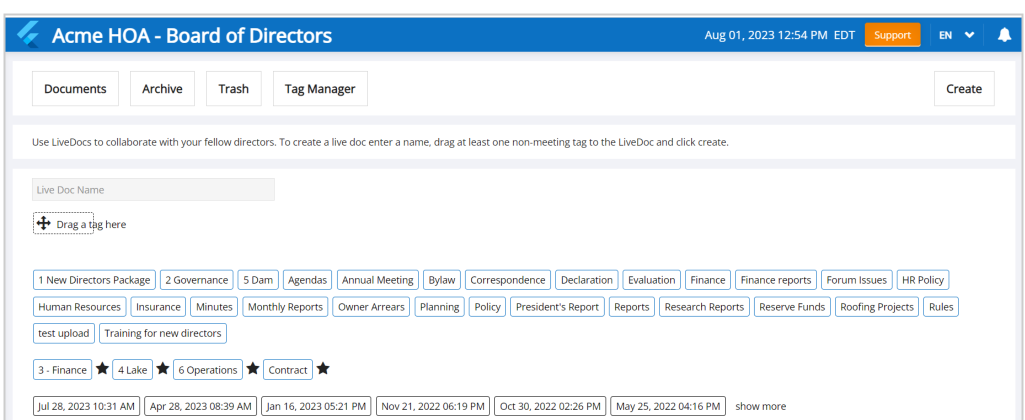
Getting Started

Go to Documents

If LiveDocs has been enabled for your board as an ad on you will see an option to Create LiveDoc (beta) in the top navigation. If you don't see it, you need to get your Super Admin to request it.



Click on Create LiveDoc (beta). New page opens.

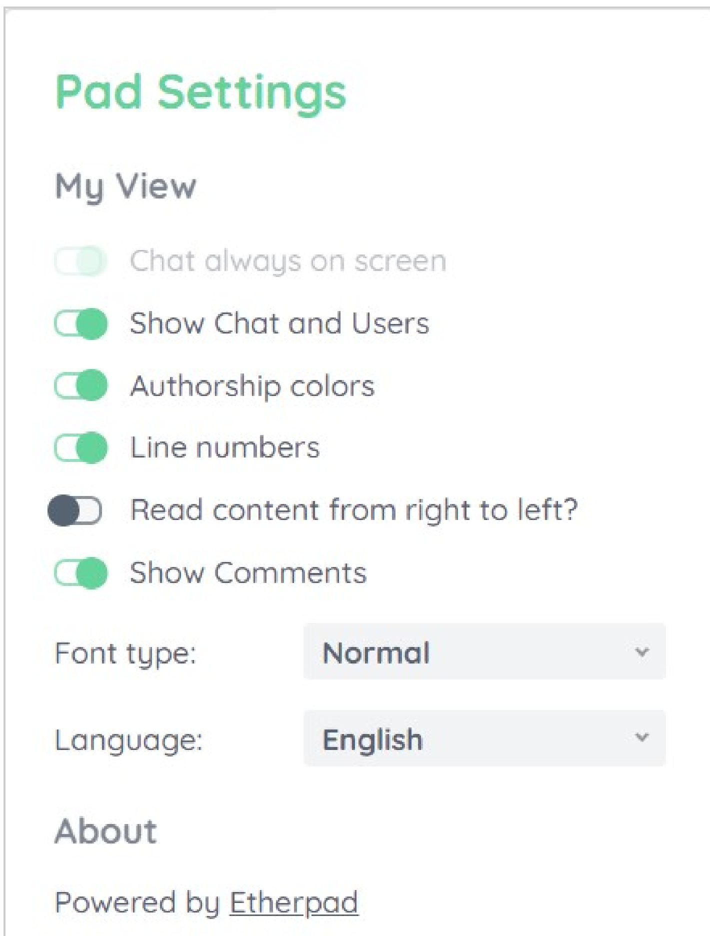


Name your document. Add tag(s) as usual. Add a meeting date tag if desired.

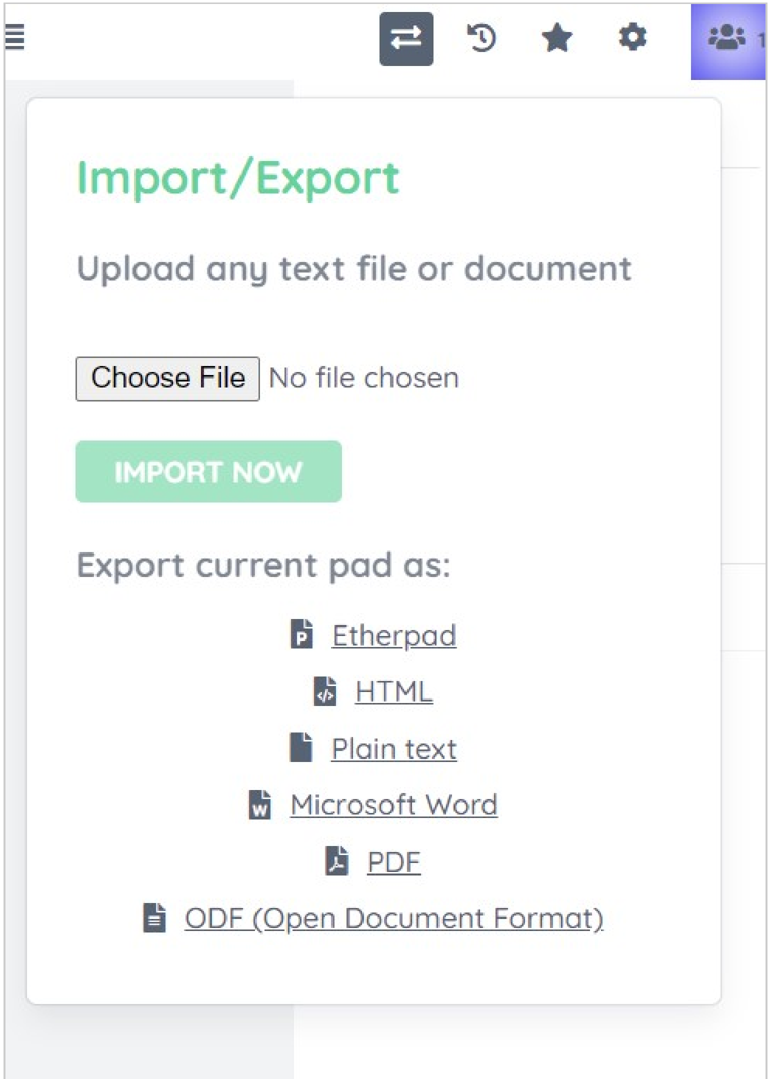
A new window will open in your browser.

It will look blank as it should.

Go to the gears icon at the top right. Be sure that "Show Chat and Users" is enabled.



A document can be imported. Click on the 2 opposite arrows icon as you can see in the image below (with the grey background).



Import your document or start typing from scratch or copy and paste content directly from another file.

Note: if you import a pdf it might not translate into a LiveDoc as you expect. Graphics and tables will likely be a bit scrambled.

Also note: When I copy and paste text or if I start typing my type is highlighted in blue - a lot of blue.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam fringilla lobortis diam. Donec sit amet dolor purus. Phasellus sodales sapien dapibus leo varius, eu sodales ante elementum. Proin neque lectus, tempor quis auctor at, eleifend ac velit. In id urna sed leo ullamcorper euismod. Donec tellus tortor, bibendum vel neque ac, euismod accumsan tortor. In dignissim placerat enim, quis pellentesque nunc tempus eu. Pellentesque egestas eget lectus ut tempus.

Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Pellentesque viverra placerat ipsum cursus rhoncus. Phasellus at condimentum ante, nec rhoncus odio. Nam pulvinar ipsum mi, at bibendum enim vehicula eget. Ut quis metus a turpis vehicula luctus. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae; Quisque ut varius nibh, vitae euismod mi. Integer a lectus mauris. Etiam rutrum fringilla elit rhoncus iaculis. Ut et sollicitudin dolor.

Duis hendrerit diam lectus, et semper ligula ultrices sed. Cras in diam feugiat, ornare lorem a, laoreet ligula. Mauris posuere, odio sit amet faucibus porttitor, sapien lacus imperdiet nisi, at hendrerit lorem mauris nec urna. Nam tincidunt vitae eros vitae venenatis. Vestibulum ullamcorper velit ut lacinia lobortis. Nunc malesuada volutpat justo venenatis finibus. Proin gravida malesuada arcu id condimentum.

Vestibulum iaculis augue sed mauris suscipit, id dapibus turpis porta. Nam malesuada mollis metus ac vehicula. Etiam pellentesque laoreet dignissim. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Cras turpis enim, bibendum sed diam ac, facilisis mollis orci. Integer molestie ex et libero iaculis posuere. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. In suscipit massa at dui porta mollis. Maecenas tincidunt rhoncus leo id sollicitudin. Sed ex tortor, tincidunt ut commodo at, euismod eget quam. Integer tincidunt sagittis justo, id rutrum quam auctor id. Fusce nec nulla metus. Quisque non dolor sem. Sed sem est, vestibulum sed tellus et, semper tincidunt justo.

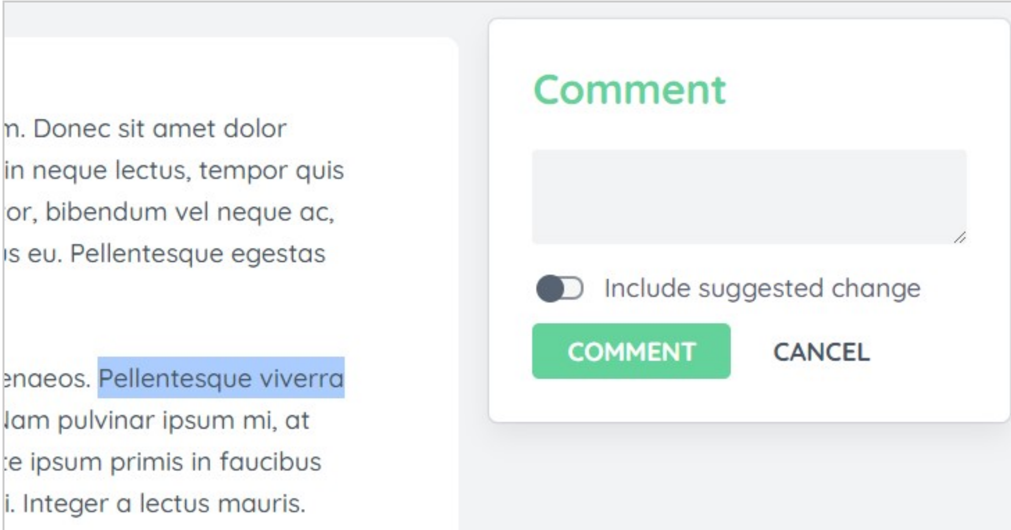
I suggest turning off the author highlighting as it is not very useful. It is just too much colour.

Click on the eye icon at the top to remove the blue author highlighting. It won't always be blue - it could be another colour.

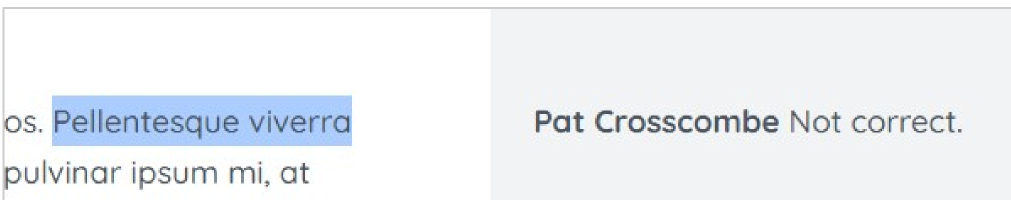
When another user has a suggestion for a change to the text, add it using comments.

Click on the icon 

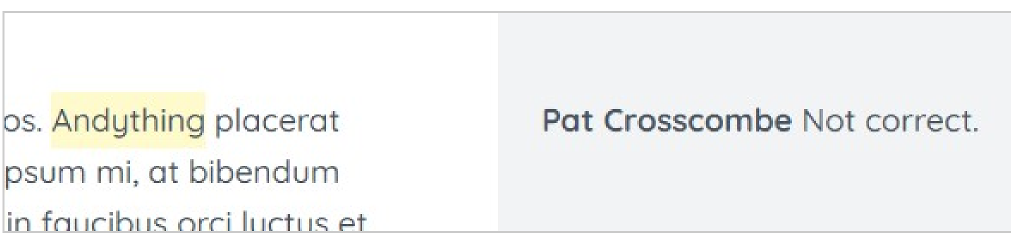
A popup will show.



Highlight the text to change, add a brief explanation in comment and enable suggested change and then add the suggested change.



Once a user has suggested a change - you see the name, their comment and if you click on their name you can see the proposed change and it can be accepted or rejected.



The change is highlighted in yellow so that changes can be followed. Changes can be undone later if needed.

Importing a document is the same steps as already described.

Understanding document deletion rules

Created by Pat Crosscombe, Modified on Thu, 20 Aug 2020 at 11:39 AM by Pat Crosscombe

After a document has been uploaded to BoardSpace for six months, it becomes a permanent record, unless;

- In the first seven days, if it is deleted by the same user that uploaded it (this deletion cannot be undone).
- After seven days, but before six months, documents can be moved to trash by the recording secretary or board admin. Trashed documents are removed from the document list, but are not yet deleted.

After one year, trashed documents are permanently deleted automatically. After six months, trashed documents can be manually deleted by board admins.

Trashed documents can be restored anytime before being permanently deleted after one year.

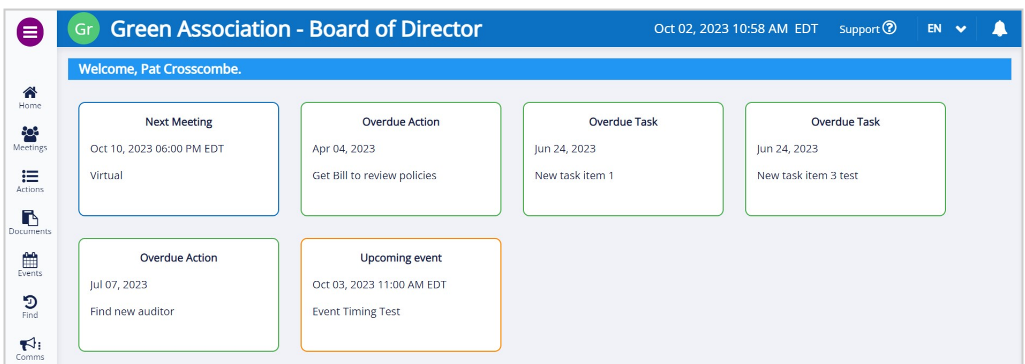
Understanding the Home page

Created by Pat Crosscombe, Modified on Fri, 13 Oct 2023 at 09:42 AM by Pat Crosscombe

What's on the Home page?

- Next Meeting Dates
- Overdue Actions
- Upcoming Events
- e-Sign notifications
- Poll Invites

Click on any tile to go to that activity.

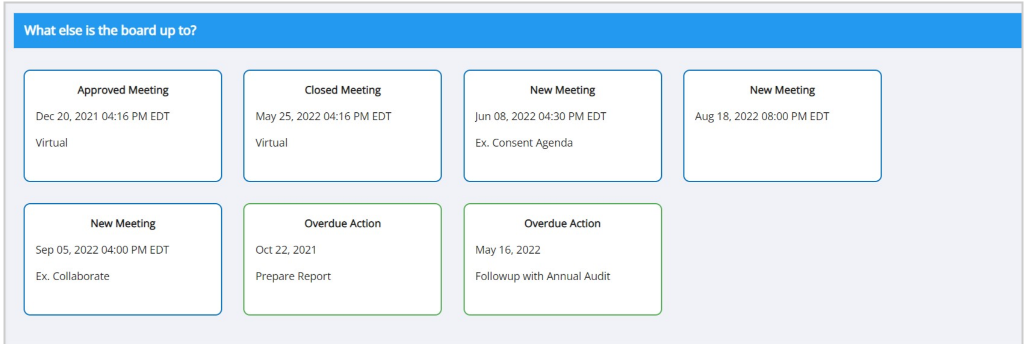


(Click on an image to enlarge it.)

What else is the board up to?

Find out about:

- Past meetings
- Actions assigned to other people
- Poll results



(Click on an image to enlarge it.)

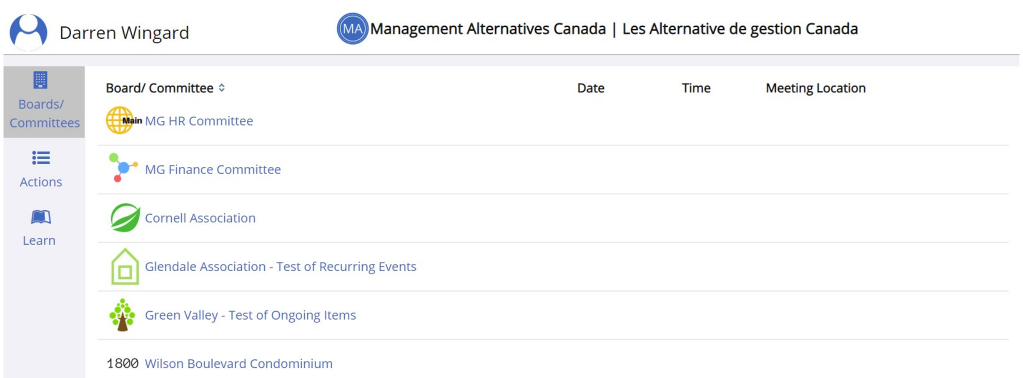
Updated October 2023 (linked to Help)

Why doesn't one of my managers see all of his committees when he logs

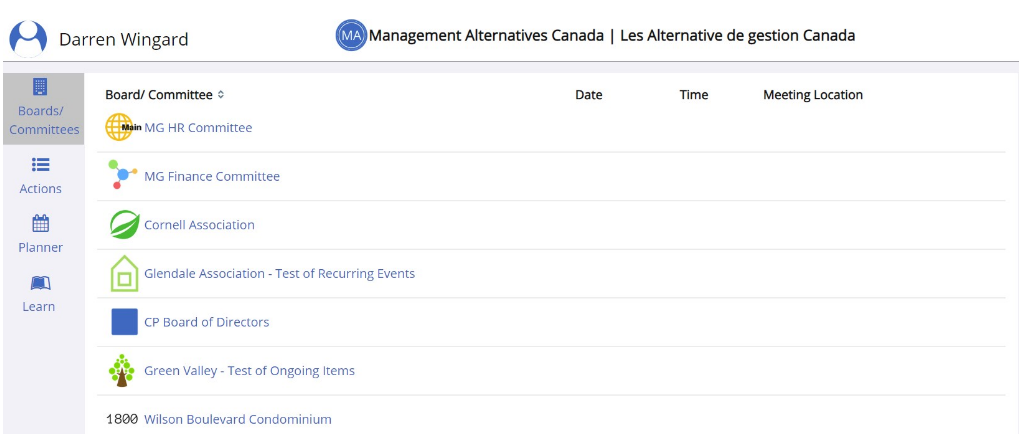
Created by Pat Crosscombe, Modified on Mon, 13 Jan 2020 at 11:30 AM by Jasmine Vary

One of the staff of my organization does not see all of the committees to which he has been added. Why?

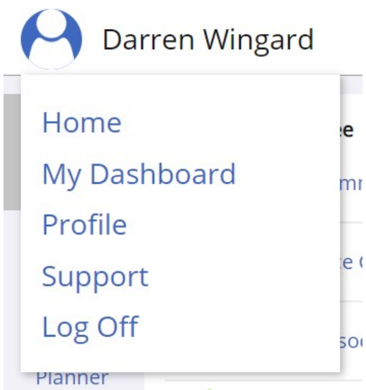
If a person has been added as a manager to one committee and a manager to another committee then I'm pretty sure that I'm correct in saying that unless a staff person, such as Joe McCabe has an official position as an officer of the board he should be a manager and identified with his job title.



As far as your initial question, because of the way we have structured BoardSpace we have different dashboards for different types of users. Click on your photo in the left-hand corner (or the person icon if you haven't added your photo). Note there is Home and My Dashboard.



Home takes you to the list that includes the board and committees.



If you go to My Dashboard - you are going to see the same list but the left-hand side menu is different. You'll be able to see all of your actions and events from here without having to go to each board/committee to see them.

If Joe goes to his My Dashboard he will see the 3 committees. If he goes to his Home page he will only see 2 committees the ones on which he is a manager.

How do I add a manager to my board?

What are Global Agendas?

Created by Pat Crosscombe, Modified on Mon, 08 May 2023 at 09:55 AM by Pat Crosscombe

Super Admins can apply a global agenda across from the board to all committees. Never re-create an agenda again. Check out the map icon on the left-hand side menu and follow the instructions.

What is the difference between Global Agendas, Agenda Templates + Agendas?

Global agendas are setup by the super admins and can be applied from the board across all committees.

Agenda templates are created in a board or committee by the board admins or recording secretary and are can be added to a meeting.

Agendas represent the agenda for a specific meeting and is not reused for a subsequent meeting unless the agenda template is updated.

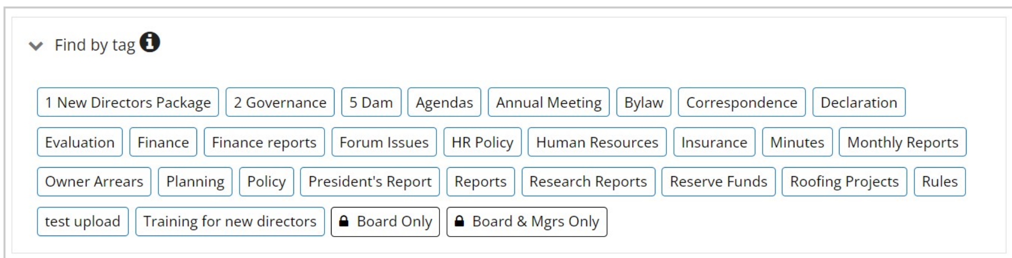
Related Tags

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 02:45 PM by Pat Crosscombe

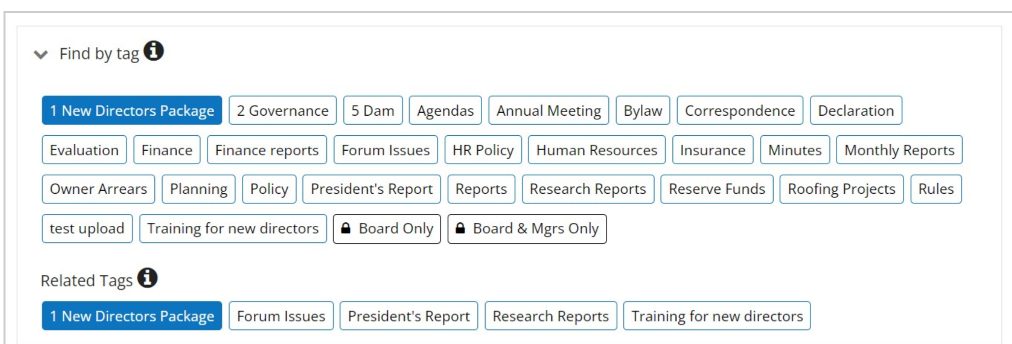
Related tags help you find documents by showing any tags associated with the tag clicked above.

Example: Go to **Documents**

Look at **Find by Tag**



If you click on the tag labelled 1 New Directors Package, Related tags automatically provides additional tags that will filter the list of potential documents fitting your search requirements.



Updated Sept 2023

What are the 4 different types of meetings?

Created by Pat Crosscombe, Modified on Wed, 06 Dec 2023 at 02:47 PM by Pat Crosscombe

Meeting Type	Description
Regular	These meetings are attended by the board's directors, officers, managers and staff. They are usually held on a monthly basis could also be held more or less frequently.
Regular (without attendance)	Meetings that do not use quorum and no attendance can be taken. People attending the meeting must be added manually into a text box. The minutes are locked without any formal approval. These meetings can be used to add minutes to meetings that have been held in the past. They can also be used anytime for an informal meeting where recording attendance or formal approval is not required.
Annual or Annual General	These meetings are held once per year and attended by the condo owners or nonprofit or association members as well as the board of directors. Some functions that are available for regular meetings are not available for this meeting type. This includes motions and the calculation of quorum.
Special	Special meetings are any meetings held during the year (other than the annual meeting) that are held for the owners or members. Some functions that are available for regular meetings are not available for this meeting type. This includes motions and the calculation of quorum. DO NOT USE for meetings where only the board of directors will be attending.

Updated December 2023

What are the different positions?

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 02:16 PM by Pat Crosscombe

Super Admin

Super Admins have the most complex role and the highest level of access. Super admins set up the overall organization and can add or remove all types of users. Super admins are responsible for setting up the organization. The super admin has the capacity to add or remove anyone from the organization. Super admins are automatically Admins and can add or remove directors, officers, recording secretaries, and stakeholders. It is advisable to have at least two people in this role.

Board Admin

With Administrative Priviledges

Admins have the next most complex role and the 2nd highest level of access. Admins can add or remove directors and officers, and recording secretaries. Admins are responsible for setting up a board or committee. An admin has a similar responsibility as a super admin, except that it is for a specific board or committee.

Recording Secretary

The Recording Secretary is the person that is responsible for taking minutes. The recording secretary plays a critical role on a board of directors. This individual is responsible for preparing meeting agendas, drafting meeting minutes and making the final changes before approving the minutes.

Officer

Officers are usually appointed members of the board of directors of the organization. Officers are non-voting members of the board.

Director

Directors are elected members of the board and able to vote.

Manager

Managers include property managers, executive directors, CEOS, and others who work very closely with the board of directors but are not a member of the board. Managers do not vote. Managers work very closely with the board of directors and have access to the records of the organization. They attend board meetings and can be assigned actions.

Special

This includes professionals such as lawyers, auditors, accounts, or engineers.

Others

Others refer to owners or members.

At a condo, HOA, coop, or community association others refers to residents or owners.

For a non-profit, others refers to members of the organization.

For a for-profit corporation, these people own shares in the corporation. These people belong to the organization and need access to records such as minutes and documents.

The attached document shows in detail the access each role has.

Click for more detailed information about positions.

Updated Sept 2023

What are the minimum technical specifications needed for BoardSpace?

Created by Pat Crosscombe, Modified on Mon, 14 Feb 2022 at 12:21 PM by Pat Crosscombe

Operating System
Windows or iOS

Browsers

Windows - Chrome, Firefox.
iOS - Chrome, Firefox.

(Use recent versions for best results)

Older windows versions such as Windows Vista and Windows XP are not recommended. Microsoft has ended support for XP and Vista, therefore using either of these versions is a security risk for your computer.

It is strongly recommended to use a mouse with your laptop. You will find it much easier to navigate.

What is a csv file?

Created by Pat Crosscombe, Modified on Tue, 01 Dec 2020 at 05:24 PM by Pat Crosscombe

A CSV is a comma-separated values file that allows data to be saved in a table structured format. CSVs look like a garden-variety spreadsheet but with a .csv extension.

How do I create a CSV file for importing users?

An excel spreadsheet can be saved as CSV file by Clicking on File, choosing Save As, and selecting type CSV (Comma delimited) and saving.   .

What is the best size for my logo image?

Created by Pat Crosscombe, Modified on Tue, 01 Dec 2020 at 05:33 PM by Pat Crosscombe

Accepted file types are jpg, png or gif.

For best results choose a square image with a size of at least 100 pixels by 100 pixels.

Images larger than 100 pixels by 100 pixels can be uploaded without any problems.

The key is to upload a square image. If it is not square, the image will be distorted and won't look very nice.

What is the difference between a director and an officer?

Created by Pat Crosscombe, Modified on Mon, 11 Nov 2019 at 09:44 AM by Jasmine Vary

The main difference between directors and officers is the director's vote and officers do not vote.

Directors and officers are part of a board of directors and attend board meetings.

What is the difference between an Officer and a Director?

Created by Pat Crosscombe, Modified on Fri, 22 Sep 2023 at 02:37 PM by Pat Crosscombe

The difference between directors and officers is this:

Directors are board members elected by owners or members.

Officers are persons appointed by the board to fulfill certain functions such as President, Treasurer, or Secretary. Usually officers are also directors.

Updated Sept 2023

What is the maximum number of people I can add to my board?

Created by Pat Crosscombe, Modified on Fri, 08 Nov 2019 at 11:21 AM by Jasmine Vary

You can add an unlimited number of people to your Board. Of course, most boards have limits so it's unlikely that more than 15 - 18 people will be on any 1 board.

What position or role should I give this new user?

Created by Pat Crosscombe, Modified on Mon, 11 Nov 2019 at 09:19 AM by Jasmine Vary

This chart describes the features that each role can access. It will help you decide when adding new users.

	Documents			Actions			Minutes			
Role	View	Delete	Upload	View	Assigned	Reassign	Draft Min	Approved	In progress	Edit
Owner	Yes	No	No	No	No	No	No	Yes	No	No
Professionals	Yes	No	Yes	No	No	No	No	Yes	No	No
Manager	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No
Director	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No
Officer	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	No
Recording Secretary	Yes	No	Yes	Yes	Only if Director	Yes	Yes	Yes	Yes	Yes
Board Admin	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Super Admin	Have the ability to set up new boards and automatically become board admins.									

What you need to know about BoardSpace

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 10:42 AM by Pat Crosscombe

Congratulations on taking the first steps toward digital freedom. Team BoardSpace is excited to welcome you to our board management software portal. We look forward to working with you and will be with you at every stage of the journey.

Before getting started there are a few things we'd like you to know about BoardSpace.

Where to use BoardSpace
BoardSpace can be used on your desktop, laptop, tablet or smartphone (always make sure the operating system is up-to-date) and is accessed via a browser, such as Chrome or Firefox. There is nothing to download.

Log in via this link **https://app.boardspace.co**

On a smartphone or tablet
Login using the same link.

Access
When each user logs in, the system provides that user access to the boards and committees on which the user has an active role.

Positions
People can have more than one position. Typically, the super admin also has admin privileges and could also be the recording secretary. Directors are sometimes also a recording secretary. Condo and HOA owners can also be directors, have admin privileges and super admins. Association members can also be directors, board admins, or a recording secretary. Each organization decides upon the positions that each person will have. More about positions

BoardSpace operates in real-time
This means that if you set a meeting date for say January 15 and add the directors on February 1, there will be no directors showing in the attendance list for the January 15 meeting. Always add directors before the meeting starts. Safer still to add the day before the meeting.

Adding People

We recommend adding directors and officers after setting up the first board meeting but before the date of that meeting.

Any time a new person such as a director is added an email is automatically sent with an invitation to set up an account and password. Make sure that BoardSpace has been announced to the board so they are not surprised by the emails.

First-time access

New people need to create a password before being able to log in. Each new person will receive an email with a link to set up their account password. Passwords must be at least 8 characters and include at least one capital letter, one number, and one special character.

Password rules are enforced to ensure security. After the password is set, a confirmation email follows to confirm.

Logging In

Users can log in directly via this link
https://app.boardspace.co

Or go to the BoardSpace website https://boardspace.co and click on the login button in the top-right corner.

Upddated October 2023

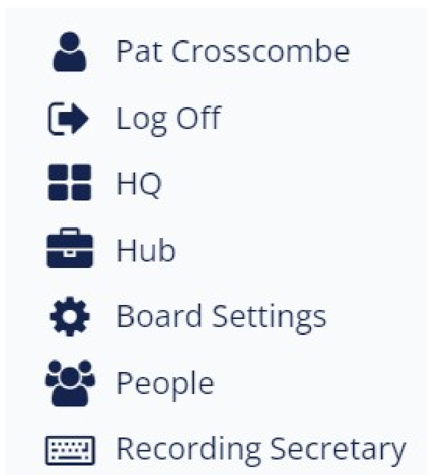
Where did the create new meeting button go?

Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 12:24 PM by Pat Crosscombe

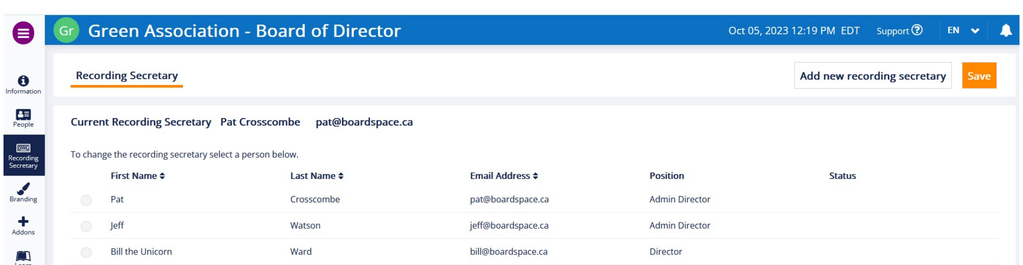
Unless you are the recording secretary you will not be able to see the create new meeting button. You must have administrative privileges to change your position to recording secretary.

To become the recording secretary and see the create meeting button:

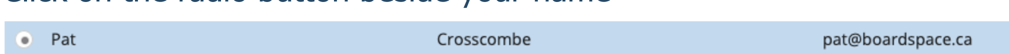
Step 1
Go to Board Settings

Go to Drop Down Menu	
Click on Recording Secretary	

Step 2



Step 3
Click on the radio button beside your name



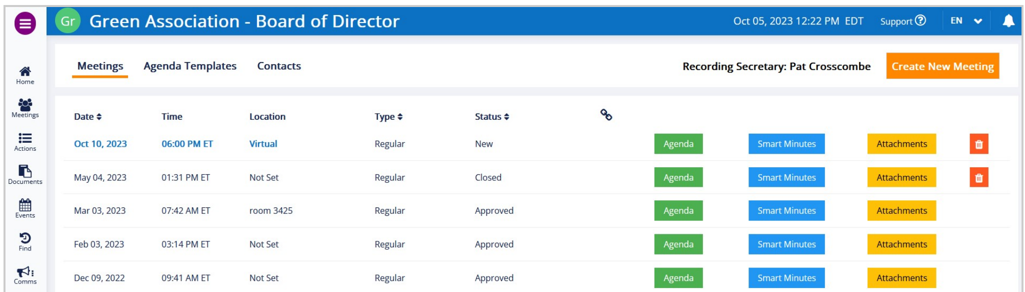
Step 4

Click Save

You will see that you are now the new recording secretary

Step 5

Go back to the meeting list page, you will see that the create new meeting button has returned and you can see the name of the current recording secretary.



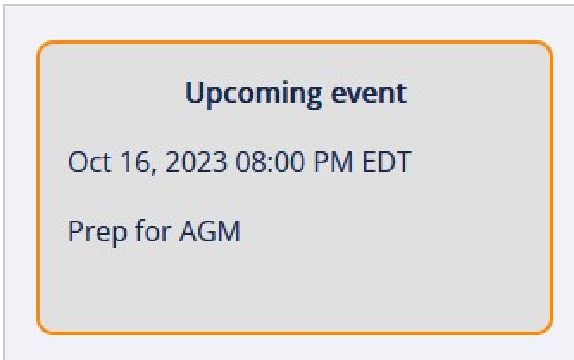
Updated October 2023

Who gets notifications for events?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 09:09 AM by Pat Crosscombe

Emails about events can be sent to are sent to everyone, only directors, only managers, or even to a specific group of people.

Upcoming events are displayed on the Home page



Updated October 2023 (FAQ)

Who is considered a Special user?

Created by Pat Crosscombe, Modified on Thu, 18 Feb 2021 at 11:48 AM by Pat Crosscombe

In the user role type, there is a type called "special"

Who should I add to this type?

This type includes include lawyers, auditors, accounts, or engineers.

Do not add managers such as organization staff or condo/HOA managers.

Why can't I add a motion to my AGM minutes?

Created by Pat Crosscombe, Modified on Fri, 17 Jan 2020 at 02:13 PM by Pat Crosscombe

AGM meetings are different. You have to manually add the motions.
Why?

Because we don't show the members or owners in the attendance list for AGMs.

Thus there would only be the directors' names in the motion dropdowns and not all of the people present.

At AGMs the members or owners present (or present by proxy) can move or second a motion.

Why does the error message say "Wrong email or password?

Created by Pat Crosscombe, Modified on Fri, 08 Nov 2019 at 11:06 AM by Jasmine Vary

Why can't you tell me if the email address is wrong?

We don't provide that information for security reasons. We don't want bots or hackers figuring out who has a valid email address because the next step is to figure out a password. If the hacker doesn't know either then our system is less vulnerable.

We do tell you what email address the password reset was sent to as a check for you. If an error is not corrected, then you will never receive the reset email.

Yes, I know its a bit frustrating but it is done for the best reason - to keep the system secure.

Why doesn't a new director show up in the attendance list?

Created by Pat Crosscombe, Modified on Tue, 10 Oct 2023 at 12:20 PM by Pat Crosscombe

Be sure to add directors (and others) before the meeting date.

If you add them after, they won't show up in the attendance list for any meetings in the past.

You can add a director without an email address.
Updated October 2023