

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_Guidelines_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_FinancialStatements_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.

InsurancePolicyComprehensive_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 what 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

Meetings						Recording Secretary: Pat Crosscombe	Create New Meeting
Date	Time	Location	Type	Status			
Oct 10, 2023	06:00 PM ET	Virtual	Regular	New	Agenda	Smart Minutes	Attachments
Jul 06, 2023	10:47 AM ET	Virtual	Regular	New	Agenda	Smart Minutes	Attachments
May 04, 2023	03:20 PM ET	Not Set	Regular	New	Agenda	Smart Minutes	Attachments
Apr 25, 2023	12:18 PM ET	Not Set	Regular	New	Agenda	Smart Minutes	Attachments
Mar 03, 2023	07:42 AM ET	room 3425	Regular	Closed	Agenda	Smart Minutes	Attachments
Feb 28, 2023	10:00 AM ET	Not Set	Regular	New	Agenda	Smart Minutes	Attachments
Feb 20, 2023	12:31 PM ET	Not Set	Regular	New	Agenda	Smart Minutes	Attachments
Feb 03, 2023	03:14 PM ET	Not Set	Regular	Approved	Agenda	Smart Minutes	Attachments

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	

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
	Click on button to create or view agenda
	Edit or Access minutes
	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.

Agenda
1 Call to Order
2 Presidents Report - Jon Smith - 15 minutes
2.1 Review
3 Approve Agenda
4 Past Minutes
5 Old Business
6 New Business
7 Adjournment

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 it 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.

2 Approval of Agenda

Motion to approve current agenda

Section to add comments regarding the agenda.

Moved by Jane Shamatia Seconded by Sammie Jones Approved Not Approved

Carried

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

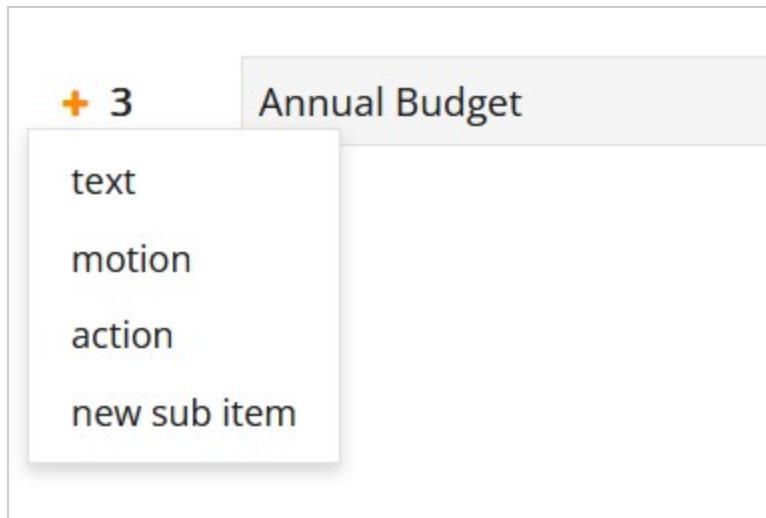
To review the actions completed since last meeting, go to [Actions](#)

6. Item

+ 4 Old Business

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.



The screenshot shows a detailed view of the 'Old Business' agenda item. At the top left, there is an orange plus sign icon followed by the number '4'. To the right of the icon, the title 'Old Business' is displayed. Below the title, there are several sections: 'Motion:' with a text input field, 'Moved by' and 'Seconded by' dropdown menus, and two buttons: 'Approved' (orange) and 'Not Approved' (grey). There are also 'Action:' and 'Assigned to:' sections with dropdown menus and date fields. On the left side of the form, there are small eye and arrow icons.

7. Ongoing

There are two types of ongoing items.

a) Events Items

The screenshot shows the 'Annual Planner' section of the application. It lists several events with their details:

Event Date	Event Name	Reminder Date	Recur
October 16, 2019	Renew Snow Contract - on Aug 17 this reminder will roll over to Sept 16	October 13, 2019	1 Months
May 01, 2020	Prep for AGM	April 01, 2020	1 Years
June 01, 2020	Review Contracts	May 01, 2020	1 Years
October 01, 2020	Recruit new directors	July 01, 2020	1 Years

A modal window is open, titled 'Event: Prep for AGM'. It contains a dropdown menu set to 'Nov 12, 2019 05:00 PM' and two buttons: 'Cancel' and 'Add'.

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

The screenshot shows the agenda list. At the top, there is a header '7 Ongoing Items'. Below it, under 'New Items', is a list item '7.1 Prep for AGM'. A detailed view of this item is shown in a box:

- 1. Ensure financial audit is finalized
- 2. Book room for AGM.
- 3. Engage recording secretary.
- 4. Prepare documents in BoardSpace.

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.

The screenshot shows the agenda list. At the top, there is a header '3 Ongoing'. Below it, there is a section titled 'Contents do not appear in approved minutes' which includes a list item 'Prep for AGM'. This item is expanded, showing a 'Carry forward' section with the same four tasks as the previous screenshot:

1. Ensure financial audit is finalized
2. Book room for AGM.
3. Engage recording secretary.
4. Prepare documents in BoardSpace.

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.

The screenshot shows the 'Ongoing' section of the agenda. It includes a list of items under 'Prep for AGM' and a 'New Items' section where a new item '3.1 Prep for AGM(cont)' is being created. The creation dialog has fields for 'text', 'motion', and 'action'.

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 screenshot shows the 'New Items' section where a new item '3.1 New ongoing item title' is being created. The creation dialog has a field for 'New ongoing item title' and a 'New Item' button at the bottom.

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

To include the item in the minutes click on Carry forward

2 Ongoing

Contents do not appear in approved minutes

Bylaw Revision

Carry forward

The board is planning to revise several bylaws.

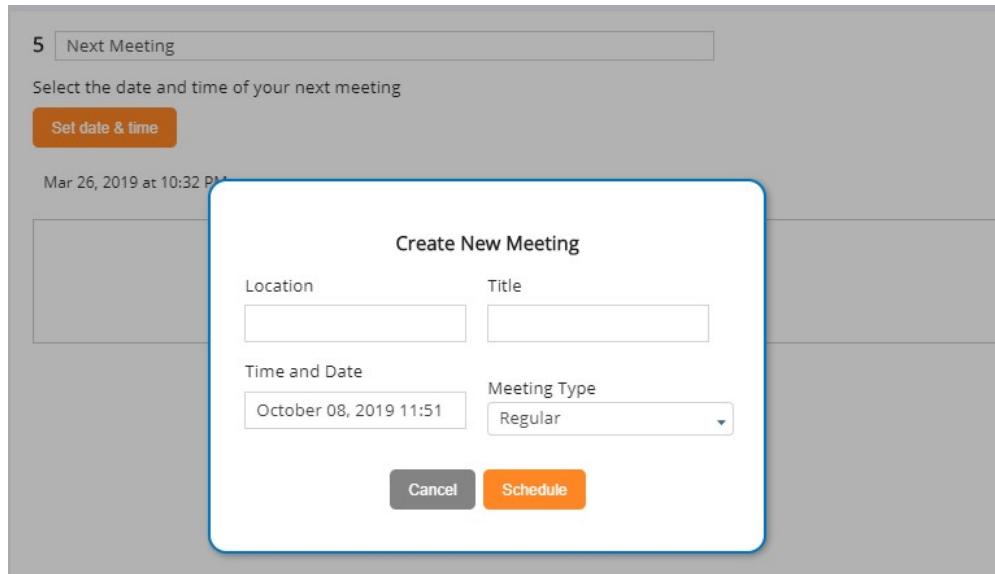
New Items

+ 2.1 Bylaw Revision(cont)

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)

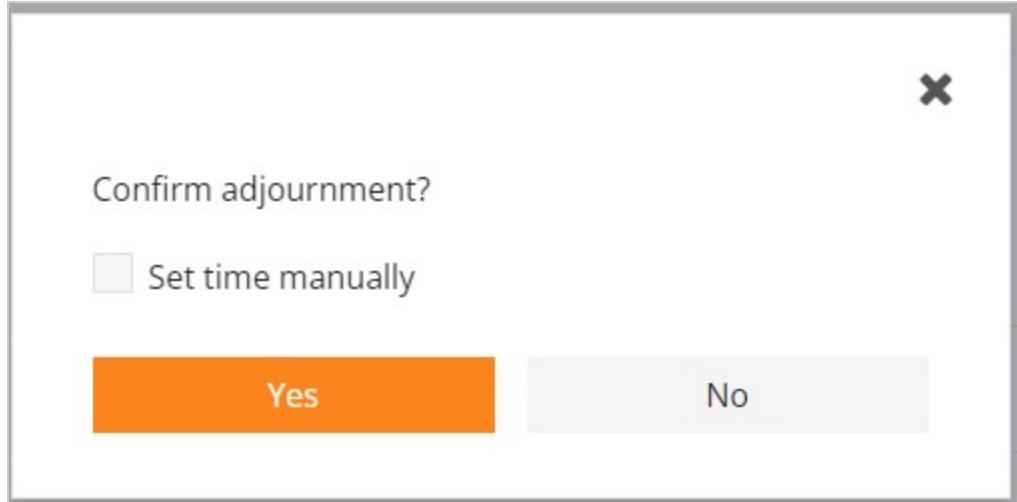
Adding a second person for adjourning a meeting is optional.

6 Adjournment

Meeting in progress

Moved by Seconded by

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.

Meetings							Create New Meeting	Board Information	Templates
Date	Time	Location	Type	Status	Links				
Jul 26, 2024	11:00 AM	Final Meeting Before App	Regular	New	Agenda	Smart Minutes	Attachments		
Jan 23, 2020	12:48 PM	BoardSpace	Regular	New	Agenda	Smart Minutes	Attachments		
Jan 14, 2020	02:47 PM	Rm 345	Regular	Closed	Agenda	Smart Minutes	Attachments		
Jan 13, 2020	11:52 AM	ottawa	Regular	New	Agenda	Smart Minutes	Attachments		
Jan 06, 2020	11:41 AM	BoardSpace Office	Regular	Closed	Agenda	Smart Minutes	Attachments		
Dec 25, 2019	04:13 PM	Committee Meeting2	Committee	New	Agenda	Smart Minutes	Attachments		
Dec 18, 2019	01:16 PM	The OfficeTest	Regular	New	Agenda	Smart Minutes	Attachments		
Dec 17, 2019	10:02 AM	Final Meeting Before App	Regular	New	Agenda	Smart Minutes	Attachments		

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.

				New Action
Date Issued	Date Due	Assigned To	Title	Complete
Nov 25, 2019	Nov 25, 2019	Jeff Watson	LOREM IPSUM	<input type="checkbox"/> X
Nov 07, 2019	Nov 26, 2019	Jasmine Valentine	Action Time	<input type="checkbox"/> X
Dec 02, 2019	Dec 03, 2019	Chris Gray	Chris's first action	<input type="checkbox"/> X
Dec 09, 2019	Dec 26, 2019	Jeff Watson	Be active for the action	<input type="checkbox"/> X
Dec 16, 2019	Dec 26, 2019	Tomas theTrainddd		<input type="checkbox"/> X

View additional details or comments.

Actions	Details	Comments
Title View Documents Edit		
Description Check to see if the documents are correct Edit		
Issued October 28, 2019		
Assigned To Jasmine Valentine	Select User Re-assign	
Due Date January 31, 2020	Revised Date Delay	

Create a new actions by clicking on the [New Action](#) button.

Title

Description

Assigned To [Select User](#)

Due Date

[Cancel](#) [Save](#)

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.

The screenshot shows a meeting event card. At the top, it displays the date "Dec 20, 2020" and the title "My First Meeting". On the right, there are edit and delete icons. Below the title, a note says "This will be the meeting before Christmas." At the bottom, there is an orange button labeled "Add event to meeting".

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.

The screenshot shows the "Activity Log" page. At the top, there are tabs for "Activity Log" (which is selected) and "History". Below that, there are filters for "Date Range" (From [] To []) and "Activity Types" (Actions, Documents, Meetings, Users, Planner, Select none). There are also "Search" and "Reset" buttons. The main area lists activity items:

Activity Type	User	Date/Time	Details	Action
Meetings	Jasmine Valentine	Jan 14, 2020 03:09 PM	Scheduled new meeting for Jan 23, 2020 12:48 PM	View
Meetings	Jasmine Valentine	Jan 14, 2020 02:09 PM	Agenda ready for meeting on Jan 14, 2020 02:47 PM	View
Meetings	Jasmine Valentine	Jan 14, 2020 12:30 PM	Scheduled new meeting for Jan 14, 2020 02:47 PM	View
Users	Jasmine Valentine	Jan 14, 2020 11:37 AM	Added Jasmine Valentine as Secretary	

History

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

The screenshot shows the "History" search page. At the top, there are tabs for "Activity Log" (selected) and "History". Below that, there is a search bar for "Keywords" containing "finance" and a checkbox for "Check if all keywords are required". There are also filters for "Activity Types" (Actions, Documents, Motions, Agenda Items, Text, Planner, Notifications, Select none) and "Date Range" (From [] To []). There are "Search" and "Reset" buttons. The main area lists history items:

Activity Type	Date/Time	Details
Document	Nov 06, 2019	full.png
Document	Nov 06, 2019	img-9169.jpg
Document	Nov 18, 2019	site plan.pdf

Notify

My Notifications - shows the notifications received by a user.

The screenshot shows a notification card. At the top, there is a user icon and the date "December 11, 2019 12:01 PM". The message content is "The meeting agenda for 10:13AM, Mon Dec 9, 2019 is ready for review." On the right, there is a close button (X).

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

Send to:

Directors Officers Managers Others Professionals Secretary [Select all](#)

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

Option 1

Send pre-written message	
For meeting	Select date
Agenda is ready for review	Send
Minutes are ready for review	Send

Option 2 - Send a custom email.

Option 2

Send personalized message	
Subject	<input type="text"/>
Message	<input type="text"/>
	Send

Learn more about how to use BoardSpace



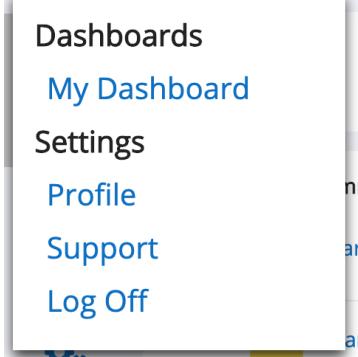
Understanding the features in the drop-down menu

Profile Picture

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



Mary Trevan



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](#) button 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 is 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 screenshot shows a 'Help & Support' interface. On the left, there's a form with fields for 'Requester *' and 'Subject *'. Below the form is a rich text editor toolbar. To the right, a search bar shows the query 'directors' and a list of results:

- Can directors see meeting agendas?
- Quick Start Guide for Directors & Officers
- What is the difference between a director and an offi...
- What are the different types of user roles?
- Quick Start Guide for Super Admins: Part 1
- Show all results

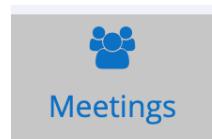
At the bottom of the form, there are links to 'Help Desk Software by Freshdesk' and 'Privacy Policy', and a 'Send' button.

	The bell opens a panel that provides updates and notices regarding the app. The bell turns red when new information is added.
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 Board Information	Board Information includes a list of directors and managers along with their contact
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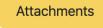
Meetings

Go to meetings



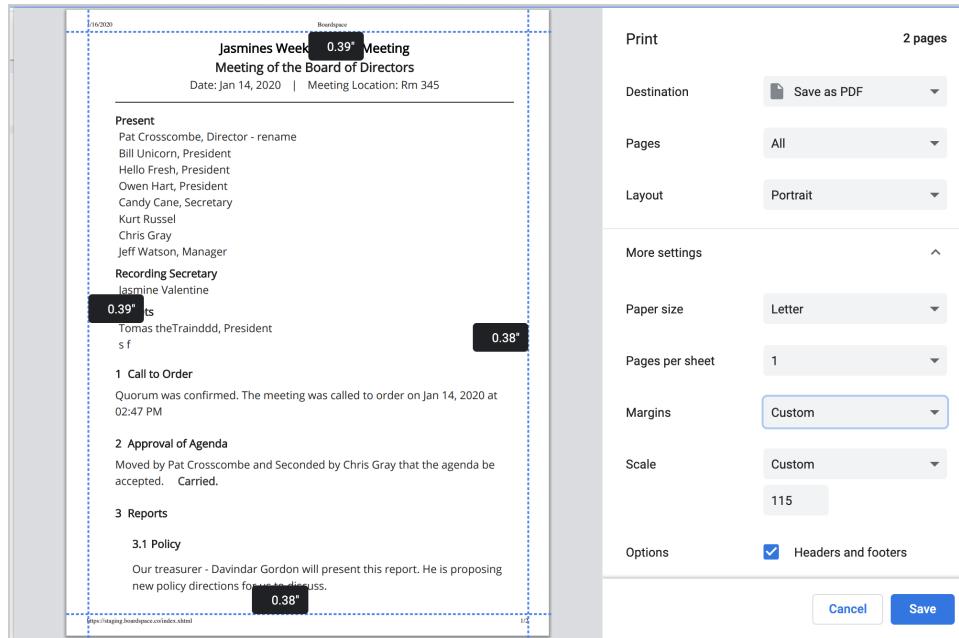
Click on for one of the meetings.

Comments can be viewed by clicking on the . Add comments by clicking on the 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  . 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  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

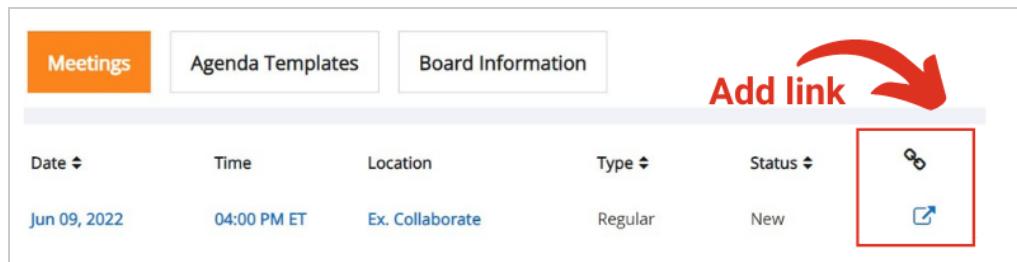


Diagram 2

Create New Meeting

Location	Time and Date	Agenda
<input type="text"/>	June 15, 2022 01:01 PM	1 Call to Order 2 Past Minutes 3 Approval of Agenda 4 Reports 4.1 4.1.1 Item 4.1.2 Item 4.1.3 Item 4.2 Item 4.3 Item 4.3.1 Item
Title	<input type="text"/>	5 Old Business 5.1 Item 6 Action Review 7 New Business 7.1 Item 8 Next Meeting 9 Adjournment
Meeting Type	Template	
Regular	Default	

Add link for video conference or another type of link.

Use this meeting type for any meeting of the board of directors.

[Cancel](#) [Create](#)

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 position, click on the row.

First Name	Last Name	Email Address	Title	Admin	Director	Officer	Other	Special
Pat	Crosscombe	pat@boardspace.ca		Yes	Yes			
Jeff	Watson	jeff@boardspace.ca	Director	Yes	Yes			
Bill the	Ward	bill@boardspace.ca	Vice President		Yes			

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.

The screenshot shows a user interface for managing accounts. On the left, there's a sidebar with icons for Information, People, Recording Secretary, Branding, Addons, and Learn. The main area is titled "People" and has a "Save" button in the top right. Below the title, there's a link to "How to manage accounts". The main content is a table with columns: First Name, Last Name, Email Address, Admin Privileges, Position, Position Description, Title, Term Length, Term Start, and Term End. The table contains four rows:

Position	Position Description	Title	Term Length	Term Start	Term End
Director	Voting member				
Officer	Non-voting member				
Other	Owner (condo or HOA) or Member (of a non-profit or charity)				
Special	Professionals such as a lawyer, accountant or engineer.				

Updated on Feb 13, 2023

Attachments (1)

The screenshot shows a file attachment. The file is named "Screenshot 2....jpg" and has a size of "19.3 KB". To the left of the file name is a sidebar with the following navigation links: Dashboards, Home, My Dashboard, Settings, Brand Settings, Manage Users, and Profile.

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.

The screenshot shows a file upload dialog. At the top is a label "Document Name" with a dropdown arrow. Below it is a text input field containing the text "DSCN4126.JPG". To the left of the input field is a small trash can icon. To the right of the input field are two buttons: an orange "Upload" button and a grey "Cancel" button.

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.

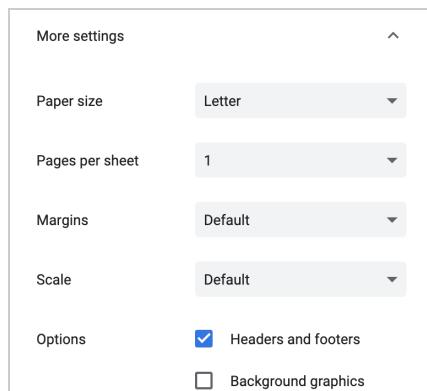
Step 1

Click on the print button



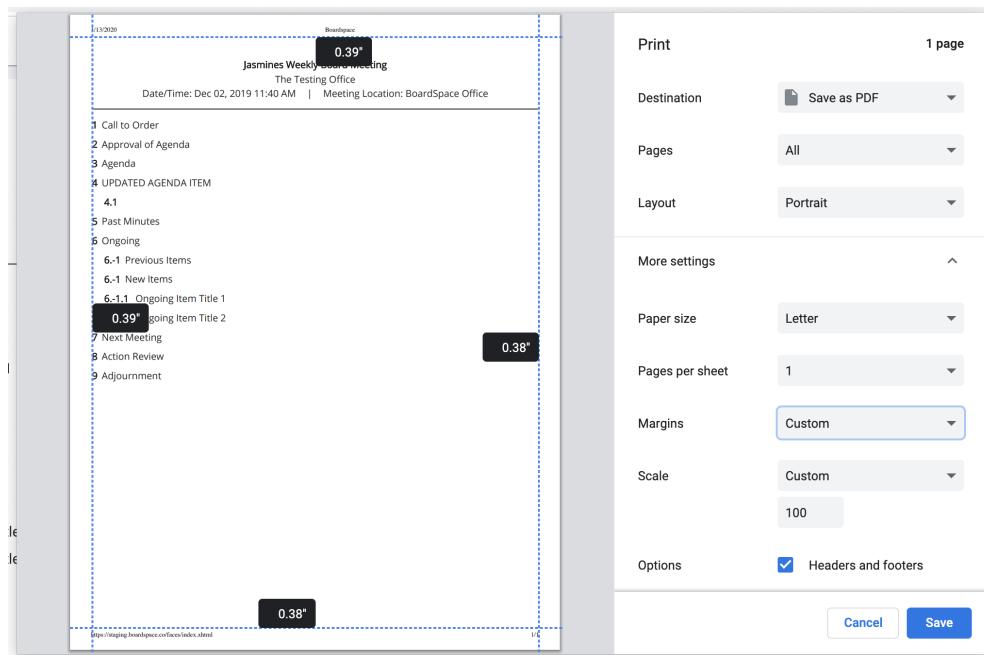
Step 2

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



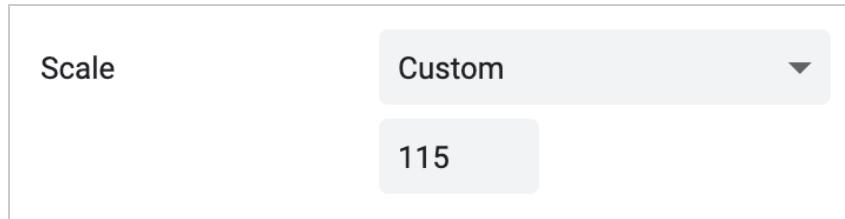
Margins

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



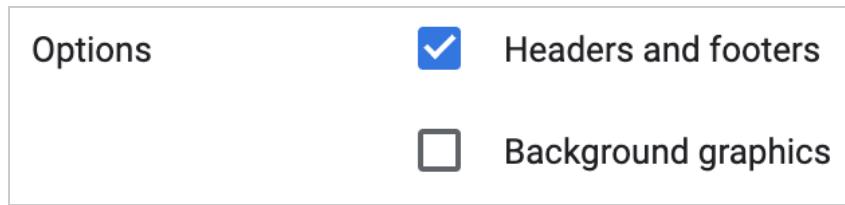
Scale

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 accessed 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.

Date	Time	Location	Type	Status	Action
Oct 10, 2023	06:00 PM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
Jul 06, 2023	10:47 AM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
May 04, 2023	03:20 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Apr 25, 2023	12:18 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Mar 03, 2023	07:42 AM ET	room 3425	Regular	Closed	Agenda Smart Minutes Attachments
Feb 28, 2023	10:00 AM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Feb 20, 2023	12:31 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Feb 03, 2023	03:14 PM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments

(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.

Create New Meeting

Location	Agenda
<input type="text"/>	1 Call To Order 2 Past Minutes 3 Ongoing Business 3.1 Monthly Budget 3.2 President's Report 4 New Business 4.1 Item 5 Item 6 Action Review 7 Adjournment
Time and Date	
<input type="text" value="October 11, 2023 12:59 PM"/>	
Add link for video conference or another type of link.	
Meeting Type	Template
Regular	Default
Use this meeting type for any meeting of the board of directors.	
Cancel Create	

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

					Create New Meeting
Date	Time	Location	Type	Status	
Dec 20, 2022	04:00 PM PT	Not Set	Regular	New	

2. Crafting the Agenda

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

Smart 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.

The screenshot shows the 'Meetings' section of the BoardSpace interface. On the left, a sidebar lists agenda items from 1 to 8. Item 1, 'Call To Order', is currently selected. The main area on the right shows the meeting details: 'AGM' and 'Board of Directors' as the title, 'Meeting Title' field, 'November 21, 2022 01:35 PM' as the date/time, and 'Meeting Location' field. Below this, a table lists attendees under the heading 'Present'. Each attendee's name is preceded by a small checkbox.

Present		Sort ⓘ
Jeff Watson, Director	<input type="checkbox"/>	
Jane Ford, President elect	<input type="checkbox"/>	
Pat Crosscombe, Director	<input type="checkbox"/>	
Sallyanna Brayville, Director	<input type="checkbox"/>	
Sammy Jones, Chair Housing Advocacy	<input type="checkbox"/>	

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**.

Dave Bull, Auditor 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.

The screenshot shows the 'Meetings' section again. The 'Call To Order' item is selected and highlighted in blue. A comment box is open over the agenda items, containing the text 'This meeting has not been called to order.' and a prominent orange 'Call To Order' button.

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.



A screenshot of a meeting agenda item titled "Annual Budget". A dropdown menu is open, showing four options: "text", "motion", "action", and "new sub item". The "text" option is highlighted. The number "3" is displayed next to the orange plus sign icon.

A screenshot of a meeting agenda item titled "Reports". A sub-item "Policy" is expanded, showing a note: "Our treasurer - Davindar Gordon will present this report. He is proposing new policy directions for us to discuss." The number "3" is displayed next to the orange plus sign icon.

- Input notes into the text boxes as necessary.
- Draft motions (these can be adjusted mid-meeting).

The screenshot shows a meeting agenda item for 'Policy'. The item details are as follows:

- Title:** Policy
- Description:** Treasurer Davindar Gordon will present this report and propose new policy directors for discussion.
- Motion:** To approve policy directors as proposed
- Moved by:** Select one
- Seconded by:** Select one
- Status:** Approved (highlighted in orange)
- Action:** Consult with legal team (due December 15, 2022)
- Notes:** Consult as needed.

Once everything's set:

Notify the board that the meeting agenda is ready.

How to send a notification

The screenshot shows the 'Notifications' section of the BoardSpace interface. It includes a list of users to be notified and a dropdown menu for selecting a meeting date.

Click on

Select user role and select all or check beside names.

Send to:						
Directors (highlighted in orange)	Officers	Managers	Secretaries	Special	Others	Select all users
<input type="checkbox"/> First Name	Last Name	Email				
<input type="checkbox"/> Pat	Crosscombe	pat@boardspace.ca				
<input type="checkbox"/> Jeff	Watson	jeff@boardspace.ca				
<input type="checkbox"/> Brad	Leman	patricia.crosscombe@alumni.carleton.ca				
<input type="checkbox"/> Sophie	Ethier	officertest1@boardspace.ca				

Go to Option 1

Sends a pre-written email.

Select meeting date from the dropdown.

For meeting

Agenda is ready for review

Minutes are ready for review

Option 2

Select date

- Select date
- Jul 26, 2024
- Jan 14, 2020
- Jan 13, 2020
- Jan 06, 2020

Click on send - reminder gets sent.

Agenda is ready for review

Send

Click yes.

A notification has been sent indicating that the meeting agenda is ready.

Are you ready to send this email?

Yes

No



New meeting agenda notifications were sent.

Option 2

Allows a custom email to be sent.

Option 2

Send personalized message

Subject

Message

Send

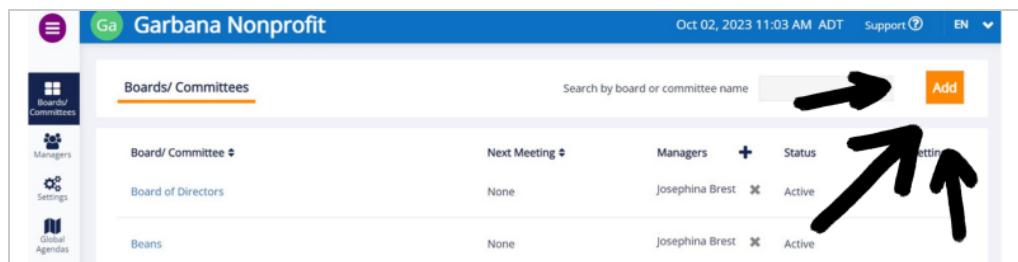
Updated October 2023

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.

The screenshot shows the Garbana Nonprofit BoardSpace interface. On the left is a sidebar with icons for Boards/ Committees, Managers, Settings, Global Agendas, Add-ons, Guides, and Learn. The main area shows a list of 'Boards/ Committees' including 'Board of Directors', 'Beans', and 'Executive Committee'. At the top right, there's a search bar, a timestamp ('Oct 02, 2023 11:06 AM ADT'), a support link ('Support'), and language settings ('EN'). A prominent blue banner titled 'Getting Started Guide' is overlaid on the page. It contains five numbered steps: 1. Add Board, 2. Set Agenda Template, 3. Create Meeting, 4. Upload Documents, and 5. Add people. Step 1 is highlighted in green. Below the steps, text says: 'The first thing you'll need to do is add your organization's primary board, like your Board of Directors. To add your primary board, click on the "Add" button on the upper right side of the screen.' Navigation buttons 'Back' and 'Next' are at the bottom right of the guide banner.

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.

The screenshot shows a 'Meeting Attachments' interface. On the left, there is a list of documents with small 'X' icons next to them. On the right, there is an 'Agenda' section titled 'Agenda Aug 05, 2020 12:34 PM' containing a numbered list of agenda items.

Meeting Attachments	Agenda Aug 05, 2020 12:34 PM
+	1 Call to Order
+	2 Past Minutes
+	3 Financial Statements (15 minutes)
+	4 Ongoing Business (10 minutes) - Yasmin
+	4.1 Expected staff holidays
+	4.2 HR Policy
+	5 Old Business (10 minutes)
+	6 Action Review
+	7 New Business
+	8 Adjournment

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.



Meeting Attachments		Agenda Aug 05, 2020 12:34 PM
Insurance Certificate.pdf	X	1 Call to Order
HR Policy COVID-19.pdf	X	2 Past Minutes
Policy HR revised v2.png	X	3 Financial Statements (15 minutes)
Policy vacation v4.png	X	4 Ongoing Business (10 minutes) - Yasmin
HR Policy COVID-19 (2).pdf	X	4.1 Expected staff holidays X Policy vacation v4.png
Contract Extra.pdf	X	4.2 HR Policy X Insurance Certificate.pdf ▼ X Policy HR revised v2.png ▲▼ X HR Policy COVID-19.pdf ▲▼ X HR Policy COVID-19 (2).pdf ▲▼ X Contract Extra.pdf ▲
		5 Old Business (10 minutes)
		6 Action Review

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

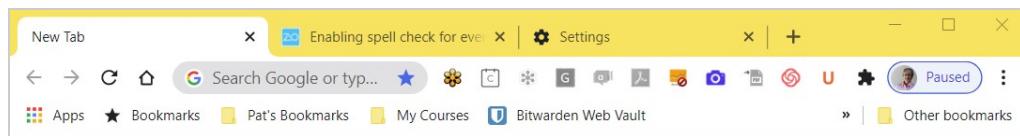
Created by Pat Crosscombe, Modified on Tue, 25 Aug 2020 at 12:28 PM by Pat Crosscombe

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.

Languages

Language
English

Spell check

Basic spell check

Enhanced spell check
Uses the same spell checker that's used in Google search. Text you type in the browser is sent to Google.

Use spell check for

English (Canada)

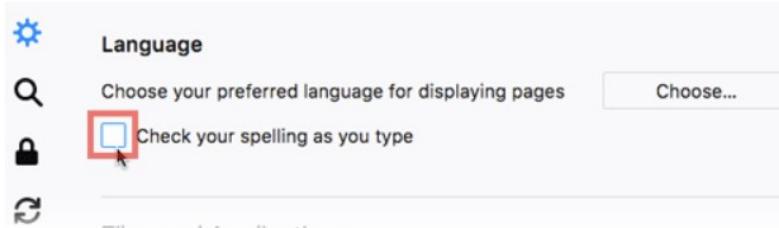
French

English (United States)

Customize spell check ▶

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



Board Only

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

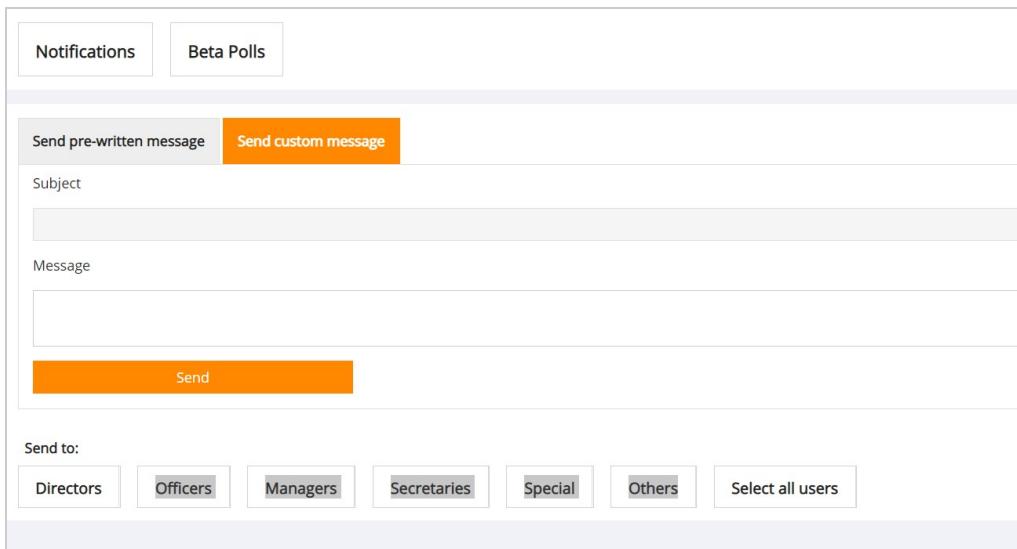
Board Only - used to prevent managers and owners/members from viewing certain documents.

Reviewed Updated October 2023

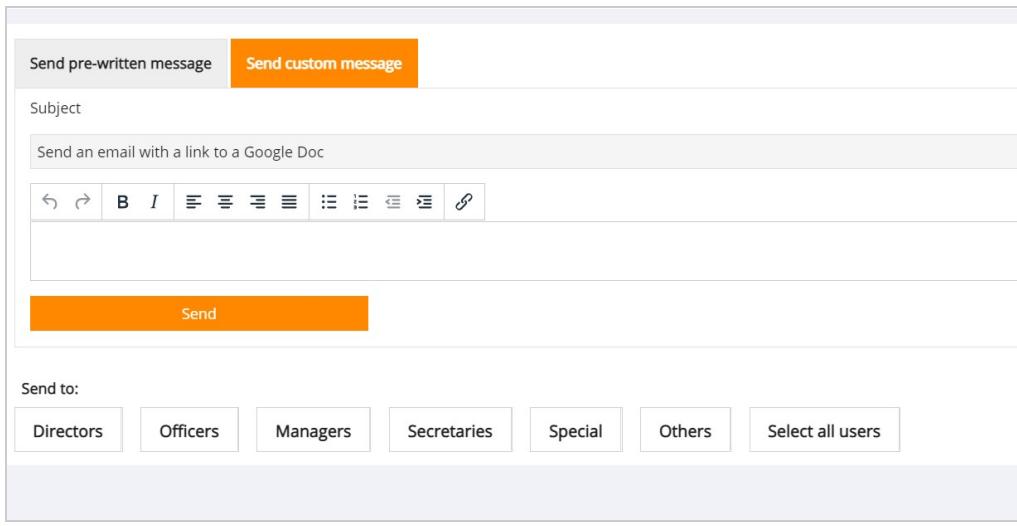
How do I add a link to a notification?

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

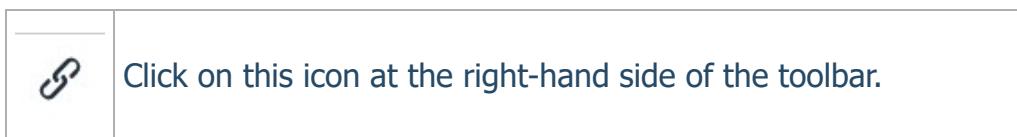
1. Go to Comms
2. Click on Send Notification
3. Select "Send custom notification."



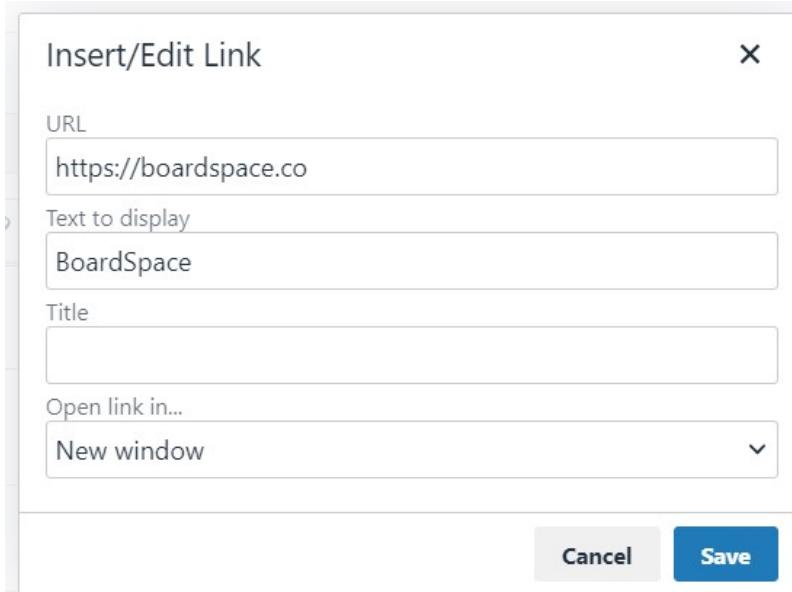
4. If you add text in the Message section, a toolbar shows that allows text to be styled.



- 5.



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?

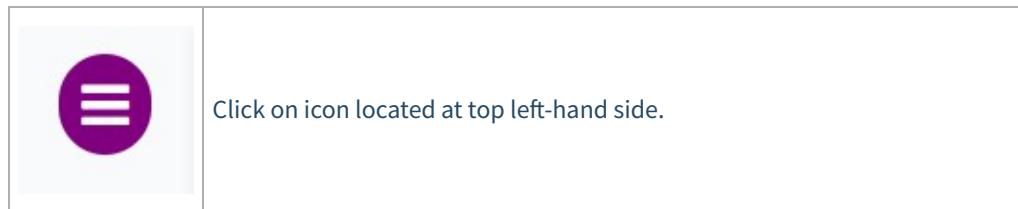
Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 11:30 AM by Pat Crosscombe

People can be added without an email address.

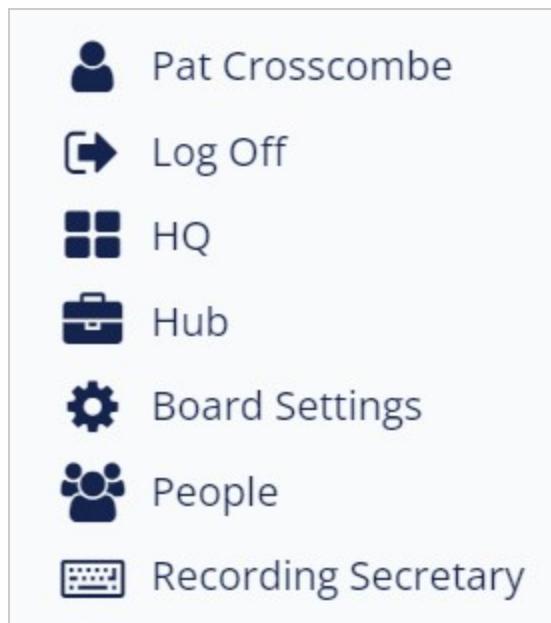
Step 1

Go to your board

Step 2



The drop down shows. Click on People



Step 3

Go to **People**

The screenshot shows the 'People' section of the Green Association - Board of Director's account. It lists three individuals:

First Name	Last Name	Email Address	Title	Admin	Director	Officer	Other	Special
Pat	Crosscombe	pat@boardspace.ca		Yes	Yes			
Jeff	Watson	jeff@boardspace.ca	Director	Yes	Yes			
Bill the	Unicorn	bill@boardspace.ca	Vice President	Yes				

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.

The screenshot shows the 'Add new person' form. It includes fields for:

- First Name, Last Name, Email Address, Admin Privileges
- Position (with sub-options: Director, Officer, Other, Special) and Position Description
- Title, Term Length, Term Start, and Term End

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.

A screenshot of a web interface showing a blue button labeled "Smart Minutes". Below it is a form for a meeting. The form includes fields for "Regular Meeting" (set to "Cornell Association"), "Meeting Title" (empty), "Date/Time" (set to "Apr 26, 2019 19:30"), and "Meeting Location" (set to "Room 34, Community Bl"). There is also a large empty text area below these fields.

Step 2

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

A screenshot of a web interface showing a form for a meeting. The form includes fields for "Regular Meeting" (set to "Glendale"), "Meeting Title" (set to "Meeting of the Board of Directors"), "Date/Time" (set to "November 12, 2019 17:00"), and "Meeting Location" (set to "Room 356").

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 23:00 Meeting Location: board room

Meeting was originally scheduled for: Dec 05, 2019 at 11:52 AM

Present

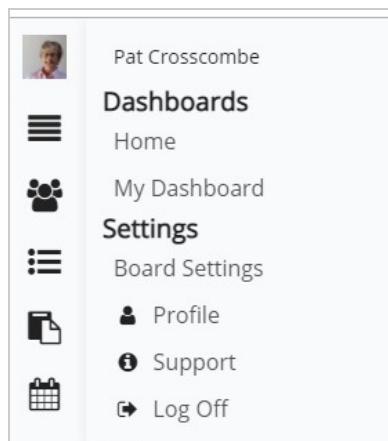
- Jane Shamatia, TEST 2
- Davindar Gordon, Treasurer
- Yasmin Singh, President
- George Bopper,
- Owen McAdams
- Wendy Riddler
- Omar Brison
- Jeff Watson, Observer

Select AllAdd Attendee

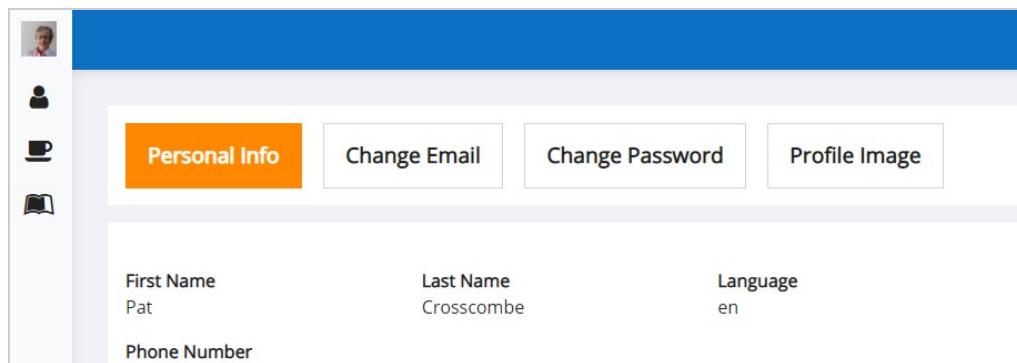
How do I change my email address?

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

Date	Time	Location	Type	Status	Action
Oct 10, 2023	06:00 PM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
Jul 06, 2023	10:47 AM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
May 04, 2023	03:20 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Apr 25, 2023	12:18 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Mar 03, 2023	07:42 AM ET	room 3425	Regular	Closed	Agenda Smart Minutes Attachments
Feb 28, 2023	10:00 AM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Feb 20, 2023	12:31 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Feb 03, 2023	03:14 PM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments

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.

The screenshot shows the 'Edit Agenda' screen. At the top, there are tabs: 'View/Print Minutes', 'Attachments', 'Edit Agenda', and 'Templates'. The 'Edit Agenda' tab is active. Below the tabs, the meeting details are listed: 'Regular Meeting' and 'Board of Director'. The date and time are set to 'October 10, 2023 06:00 PM' and 'Virtual'. On the left, a sidebar titled 'Agenda' lists items from 1 to 7. On the right, under 'Present', a list of attendees is shown with checkboxes next to their names.

Step 2

Click in the Date/Time input area.

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

The screenshot shows the same 'Edit Agenda' screen as before, but the date and time input field is now expanded. It displays a calendar for October 2023 with the 10th highlighted. Below the calendar, a time picker shows '10, 2023 at 06:00 PM'. Arrows above the calendar allow for navigating between months.

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.

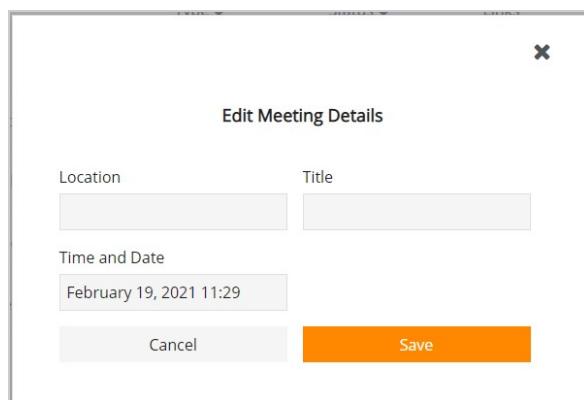
**** You must be a Recording Secretary** to do this.**

From the Meetings Page

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

Date	Time	Location	Type	Status	Links
Feb 06, 2021	12:00 AM	Zoom and GTM	Regular	New	Agenda Smart Minutes Attachments
Jan 12, 2021	11:00 AM	Zoom Call	Regular	New	Agenda Smart Minutes Attachments
Nov 20, 2020	03:14 PM	Zoom Meeting	Regular	Closed	Agenda Smart Minutes Attachments

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



From the Minutes

1	Smart Minutes	Go to the desired meeting date.
---	---------------	---------------------------------

2

Regular Meeting
Glendale

Meeting of the Board of Directors

Date/Time: November 12, 2019 17:00 Meeting Location: Room 356

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.

Regular Meeting
Glendale Board of Directors

Meeting Title

February 19, 2021 11:29

Meeting Location

< February 2021 >

S	M	T	W	T	F	S
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Sort ⓘ

Time 11:29

Hour

Minute

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.

The screenshot shows a user interface for managing board members. At the top, there are three tabs: 'Meetings' (disabled), 'Agenda Templates' (disabled), and 'Board Information' (highlighted in orange). Below the tabs, the section title 'Board of Directors' is displayed. A table lists eight board members with their names, titles, email addresses, and phone numbers. Each row includes an 'edit' link at the end of the title column.

Name	Title	Email	Phone Number
Dave Tozeski	President edit	dtozeski@mac.com	
Deb Thoms	Board Member edit	dthoms1999@yahoo.com	
Corinne Van Peursem	Board Member edit	cmwanpeursem@yahoo.com	Cell: 7862714619
Victoria Silver	Board Member edit	toria_silver@hotmail.com	
Brady Stebbins	Treasurer edit	brady.stebbins@gmail.com	
Gary Smith	Vice President edit	gsmith@99silverstreet.com	
Paul Jameson	Board member edit	paul.g.jameson@gmail.com	Cell: 7752985988

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

Date	Time	Location	Type	Status	
Oct 10, 2023	06:00 PM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
Jul 06, 2023	10:47 AM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
May 04, 2023	03:20 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Apr 25, 2023	12:18 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Mar 03, 2023	07:42 AM ET	room 3425	Regular	Closed	Agenda Smart Minutes Attachments
Feb 28, 2023	10:00 AM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Feb 20, 2023	12:31 PM ET	Not Set	Regular	New	Agenda Smart Minutes Attachments
Feb 03, 2023	03:14 PM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments

Step 2

Click on Contacts

Step 3

Click on the edit link and update the position.

Name	Title	Term	Start	End
Albert EINSTEIN	President edit	3 Years	Jan 2022	Dec 2025 more
Bill the Unicorn Ward	Vice President edit			more
Bob SPEARS	Secretary edit			more

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.

First Name	Last Name	Email Address	Title	Admin	Director	Officer	Other	Special	Signup pending	Email change pending
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	berry.sam@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.

First Name	Last Name	Email Address
Harry	James	harry.james@boardspace.ca
Last login	Never	Status Email sent Resend email

(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'.

First Name	Last Name	Email Address
Pat	Crosscombe	pat@boardspace.ca
Last login	Oct 18, 2023	Status Active

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

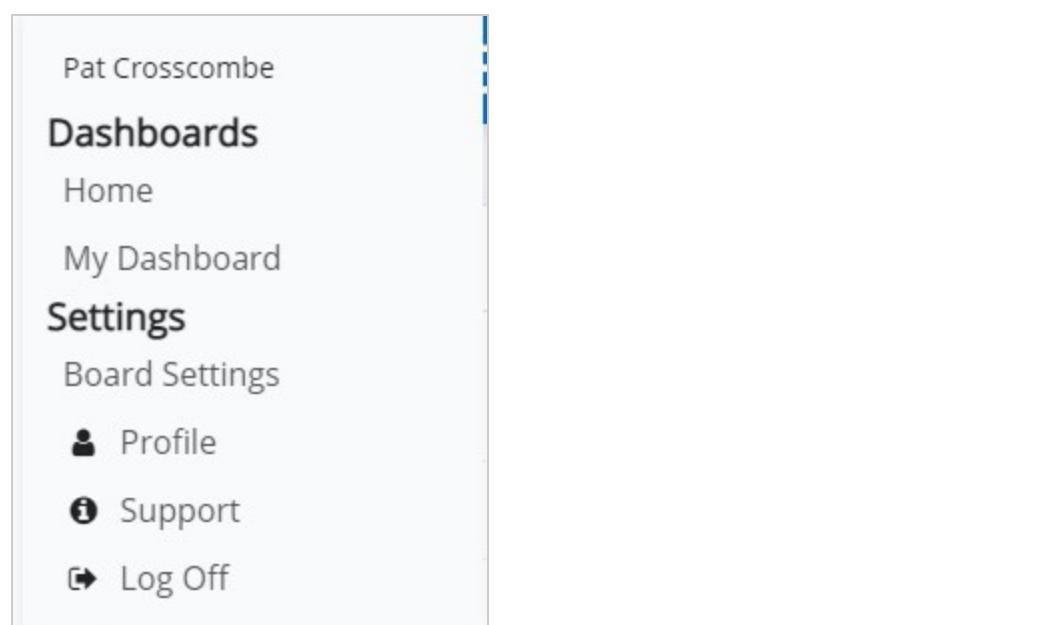
Updated October 2023

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

The screenshot shows a modal dialog titled "Edit User". It contains fields for First Name (Pat), Last Name (Crosscombe), and Email Address (pat@boardspace.ca). The Status is listed as "Active". A note states: "Users can be added with multiple roles. Check desired roles. Add specific details. If no roles are checked then the users will be removed." Under "Board Administrator", the checkbox is checked. Under "Director", the checkbox is checked. Under "Officer", the checkbox is unchecked. Under "Chair", the checkbox is unchecked. Under "Other", the checkbox is checked. Under "Special", the checkbox is unchecked. There is a text input field labeled "Enter a Title" which is empty. At the bottom are "Cancel" and "Save" buttons.

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	<input type="text"/>	<input checked="" type="checkbox"/> <input type="radio"/>

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?

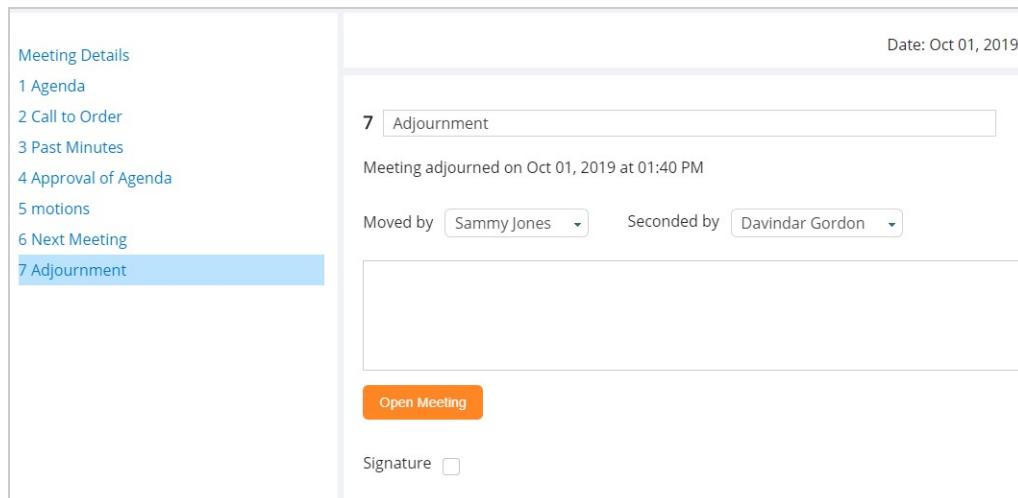
When a meeting is created it will have a status of NEW.

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.

The screenshot shows the 'Properties' tab selected in the 'Glendale Foundation' application. On the left sidebar, there are icons for Boards/ Committees, Managers, Settings, Global Agendas, Addons, and Integrations. The main content area displays a table titled 'Glendale and Mooses Condo' with columns: Board/ Committee, Next Meeting, Managers, Status, and Settings. Two rows are listed: 'Board of Director' (Next Meeting: None, Managers: Sammy G, BillyBog Friendly, Status: Active) and 'Committee' (Next Meeting: None, Managers: Davie Jones, Status: Active). An 'Add' button is located in the top right corner of the table header.

(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 modal dialog has a title 'Add New Manager' with a close button 'X'. It contains three input fields: 'First Name *' with a placeholder box, 'Last Name *' with a placeholder box, and 'Email *' with a placeholder box. At the bottom are two buttons: 'Cancel' and 'Add', with 'Add' being orange.

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.

A screenshot of a web-based application interface. At the top, there's a blue header bar with the logo 'Gl Glendale and Mooses Condo'. Below the header, there's a table-like structure with columns: 'Board/ Committee', 'Next Meeting', 'Managers', 'Status', and 'Settings'. Under 'Board/ Committee', it says 'Board of Director'. Under 'Next Meeting', it says 'None'. Under 'Managers', there's a row for 'Sammy G' with a delete icon and the status 'Active'. On the far right of the 'Managers' column, there's a '+' sign and a 'Status' dropdown menu. A red circle highlights the '+' sign, and an orange arrow points from it down to the 'Status' dropdown in the table row. A blue rounded rectangle highlights the entire 'Managers' section of the table.

(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.

×

Add Manager To: Acme Foundation

Board of Directors ▼

Add new managers in the managers tab first, before assigning to a board.

Choose Manager:

Email ▼

Add

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

Manager Name	Email	Status	Boards	Actions
Georgina Manager	Manager@boardspace.ca	Active	Board of Directors Planning Committee	Delete

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.

Apr 28, 2023 08:39 AM ▾		
<input type="checkbox"/>	Brad Leman	Director
<input type="checkbox"/>	Sophie Ethier	Director
<input type="checkbox"/>	Sammy Jones	Chair Housing Advocacy

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.

The screenshot shows a mobile-style dashboard for the Acme Foundation - Board of Directors. At the top, there's a blue header bar with the organization's name and a logo. Below it is a blue banner with the text "Welcome, Pat Crosscombe.". A red arrow points from the text "e-Signature" in the first card to the banner. The dashboard is divided into four main sections:

- e-Signature**: A white card with a black border. It contains the text "Minutes require your signature." and "Jun 21, 2022 09:50 AM EST".
- Overdue Task**: A green card. It contains the text "Jul 17, 2023" and "Contact AB Quotes".
- Upcoming event**: An orange card. It contains the text "Dec 18, 2023 08:00 PM EST" and "Prep for AGM".
- Upcoming event**: An orange card. It contains the text "Dec 27, 2023 05:30 PM EST" and "Review Implementation of Strategi...".

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

Add Documents

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

A screenshot of a web interface for uploading documents. It shows a list of steps:

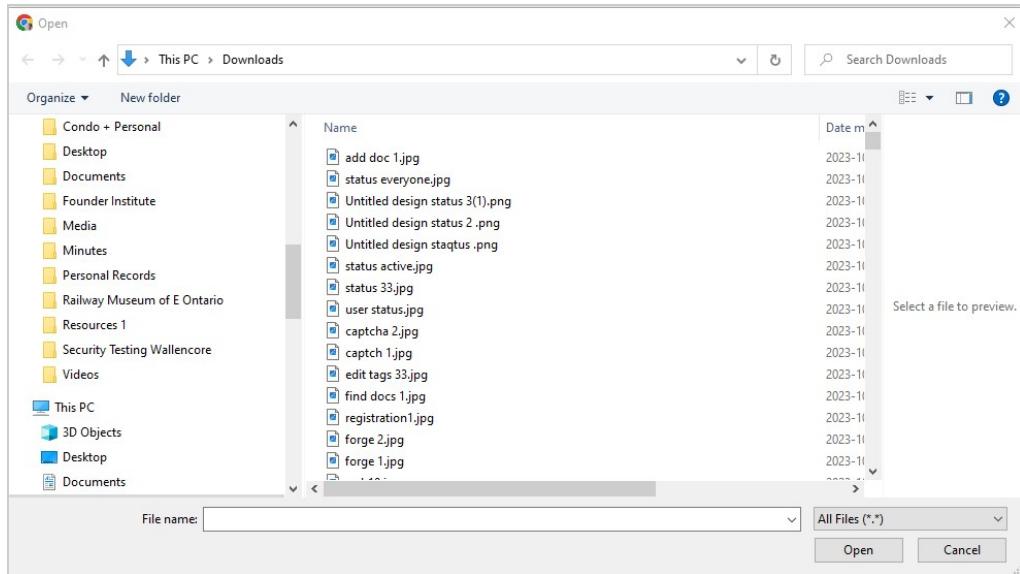
- ① Upload Documents i: A dashed rectangular area for dragging files or a "Choose" button.
- ② Add tag(s) i
- ③ (Optional) Attach Documents to Meeting i

The "Choose" button is highlighted with a yellow border.

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.

The screenshot shows a user interface for attaching documents to a meeting. At the top, there's a dropdown menu labeled '(Optional) Attach Documents to Meeting' with an info icon. Below it is a horizontal row of date filters: Oct 17, 2023 01:00 PM, Oct 04, 2023 12:25 PM, Jul 28, 2023 10:31 AM, Apr 28, 2023 08:39 AM, Jan 16, 2023 05:21 PM, Nov 21, 2022 06:19 PM, and a 'show more' link. Below these are two buttons: 'Add To All' and 'Remove From All'. A 'Document Name' dropdown is set to 'status active.jpg'. On the right, a 'Tags' section contains three tags: 'HR Policy', 'Planning', and 'Oct 17, 2023 01:00 PM', with a placeholder 'Drag a tag here'.

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



The screenshot shows the 'Green Association - Board of Director' dashboard. On the left is a sidebar with icons for Home, Meetings, Actions, Documents, Events, Comms, e-Sign, Guides, and Learn. The main area has tabs for 'Meetings' (which is selected), 'Agenda Templates', and 'Contacts'. At the top right are the date 'Oct 05, 2023 10:03 AM EDT', support links, language 'EN', and a bell icon. A recording secretary is listed as 'Recording Secretary: Pat Crosscombe'. An orange 'Create New Meeting' button is on the right. The main table lists meetings with columns for Date, Time, Location, Type, Status, and actions (Agenda, Smart Minutes, Attachments). The table shows meetings from Oct 10, 2023, to Jul 26, 2022.

(Click on image to enlarge.)

To see the documents added for that meeting, click on

Attachments

- 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.

The screenshot shows the BoardSpace interface with the 'Meetings' tab selected. On the left, there's a sidebar titled 'Meetings' with a list of attachments: 'Audited Financial Statements.pdf', 'Code of Conduct.pdf', 'Annual meeting prep.txt', and 'President's update.pdf'. Each attachment has a small 'X' icon next to it. The main area is titled 'Agenda Nov 20, 2020 03:14 PM' and lists the following agenda items:

- 1 Call to Order
- 2 Approval of Agenda
- 3 Past Minutes
- 4 New Business
 - 4.1 Finance
 - X Audited Financial Statements.pdf
 - 4.2 Presidents Report
 - X Code of Conduct.pdf
 - X Annual meeting prep.txt
- 5 Action Review
- 6 Next Meeting

(Click on image to enlarge.)

- Documents can be removed from the agenda by clicking on the **X**. 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 abladowintest@boardspace.ca.

Enter Alec in the First Name Column, Baldwin in the Last Name column, abladowintest@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	etysonatest@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

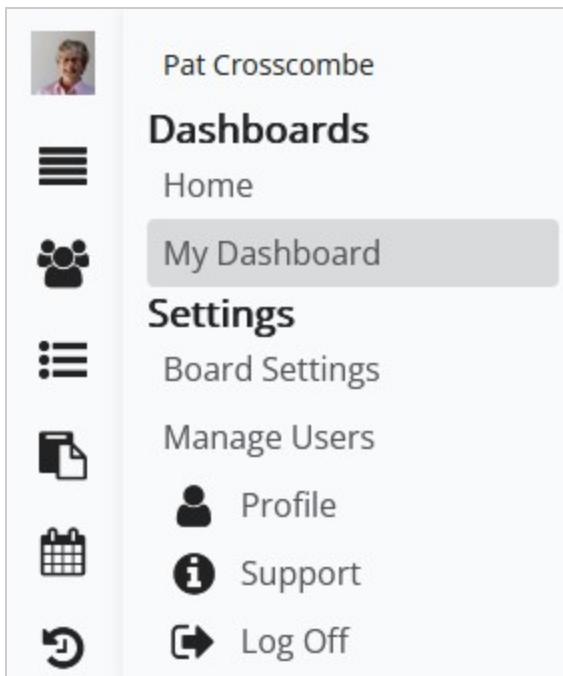
Save spreadsheet - go to File > Save As. In the contextual menu, name your file and select comma separated values (.csv) as the file format.

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)

Manage Users

Step 3

Click on "Upload Multiple People"

Manage Users

Add new user

Upload Multiple Users

Step 4

Click the button Upload csv file

Manage Users

Make a list of users that will be uploaded to BoardSpace. [Follow the instructions.](#)

Upload csv file

Step 5

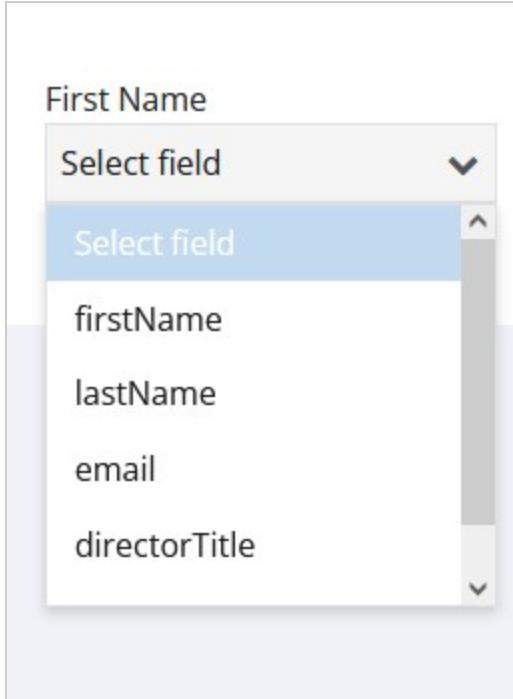
People must be added with a first name, last name and email address.

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.

Map User Information [Follow the instructions](#)
registrations.csv

Step 1 select attributes from drop down menus that match column headers.

First Name	Last Name	Email	Director	Officer	Other	Special
Select field						



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

Step 2 Add positions by clicking on tabs and check all or toggle/switch on for each.

Admin (0)

Director (0)

Officer (0)

Other (0)

Special (0)

First Name

Last Name

Email

Owen

McAdams

omcadamstest@boardspace.ca

Bonnie

James

james@boardspace.co

- 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

Step 2 Add positions by clicking on tabs and check all or toggle/switch on for each.

Admin (0)

Director (2)

Officer (0)

Other (0)

Special (0)

First Name

Last Name

Email

Director

Title

Owen

McAdams

omcadamstest@boardspace.ca



Secretary

Bonnie

James

james@boardspace.co



President

- 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

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)



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](#)

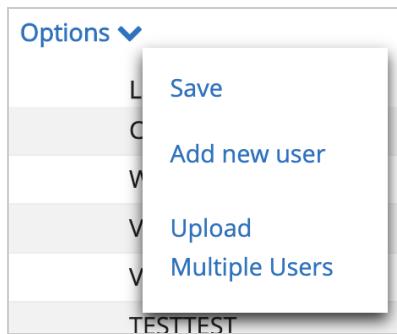
<p>1. Go to the meeting list page, click on the photo or icon (at the top-left of meeting list page)</p> <p>From the drop-down, click on Board Settings</p>	 Pat Crosscombe Dashboards Home My Dashboard Settings Board Settings Profile Support Log Off
---	---

2. Click on

Manage Users

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.

Edit User
If no roles are checked then the users will be removed.

First Name Last Name

Email Address

Status Email pending

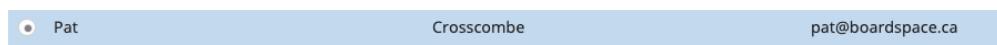
Board Administrator Director Officer

Owner/Member Professional

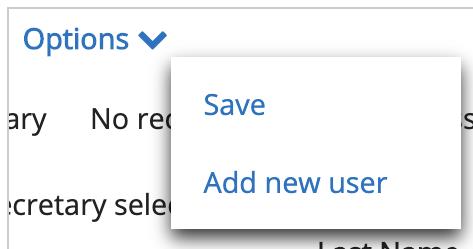
6. Recording Secretary - Add the board administrator as the recording secretary so that the basics for the first meeting can be set up.

Go to Recording Secretary

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.

The screenshot shows a meeting agenda with three items listed:

- 1 Call to Order 0 mins
- 2 Past Minutes 0 mins
- 3 Item 0 mins

Each item has a small icon to its left and a dropdown menu next to the number.

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

The screenshot shows the minutes page with the following details:

- 2 Past Minutes
- Minutes that have yet to be approved
- Motion to approve the minutes from October 04, 2023 at 12:25 PM
- Moved by: Select one
- Seconded by: Select one
- Approve button

(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)

Title	Survey of Annual Meeting Location Preference
Description	We're looking for a better meeting location for the annual meeting. We'd like your input on selecting a location.

2. Add a closing date for your poll.

When does the poll close?	Pick a closing date from calendar. Votes will not be accepted after the poll is closed.
May 16, 2023	

3. Determine the level of privacy

Determine the level of privacy

Public - Individual and aggregated results are visible to all respondents.

Blind Poll - Only aggregated results are displayed, individual responses are not displayed to any user.

Public ▾

4. Adding questions to your poll.

One or more questions can be added to a poll.

How to Add Questions

An unlimited number of questions can be created for one poll. Questions are automatically numbered. Questions can be re-ordered by clicking on the up or down arrows. Answers within a question can also be re-ordered.

You can set the maximum number of answers that can be chosen. For example, if two is selected, respondents can choose one or two answers from the possible answers.

1. Enter your question

Add answer

How many answers can be selected 1

Add question Done

Start by clicking on Add question

1. Pick one location

Ballroom

Boardroom

Foyer

Add answer

How many answers can be selected 1

Add question Done

If finished adding questions, click on Done.

Or add additional questions by clicking on the Add Question.

The screenshot shows a user interface for adding a question. It consists of two main sections:

- Step 1:** A text input field containing "1. Pick one location". To its right are three small icons: an upward arrow, a downward arrow, and a trash can.
- Step 2:** A text input field containing "2. Enter your question". Below it is a button labeled "Add answer". Further down is a text input field labeled "How many answers can be selected" with the value "1".

At the bottom are two buttons: a green "Add question" button on the left and a white "Done" button on the right.

5. Invite respondents.

How to Invite Respondents

Respondents are grouped by their roles. Clicking on directors shows a list of the board or committee's members.

All directors can be invited to a poll by checking the box beside "First Name." Individuals can be selected by checking the box beside each person's name. The same follows for Officers, Managers, Secretaries and Others.

Clicking on Select all will invite all of the board or committees members including others.

Directors

Officers

Managers

Secretaries

Others

Select all users

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

<input type="checkbox"/>	First Name	Last Name	Email
<input type="checkbox"/>	Pat	Crosscombe	pat@boardspace.ca
<input type="checkbox"/>	Jeff	Watson	jeff@boardspace.ca
<input type="checkbox"/>	Brad	Leman	patricia.crosscombe@alumni.carleton.ca
<input type="checkbox"/>	Sophie	Ethier	officertest1@boardspace.ca
<input type="checkbox"/>	Sammy	Jones	directortest2@boardspace.ca
<input type="checkbox"/>	Sallyanna	Brayville	sbrayville@boardspace.ca
<input type="checkbox"/>	Guy	Vellna	testdirectortest3@boardspace.ca
<input type="checkbox"/>	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:

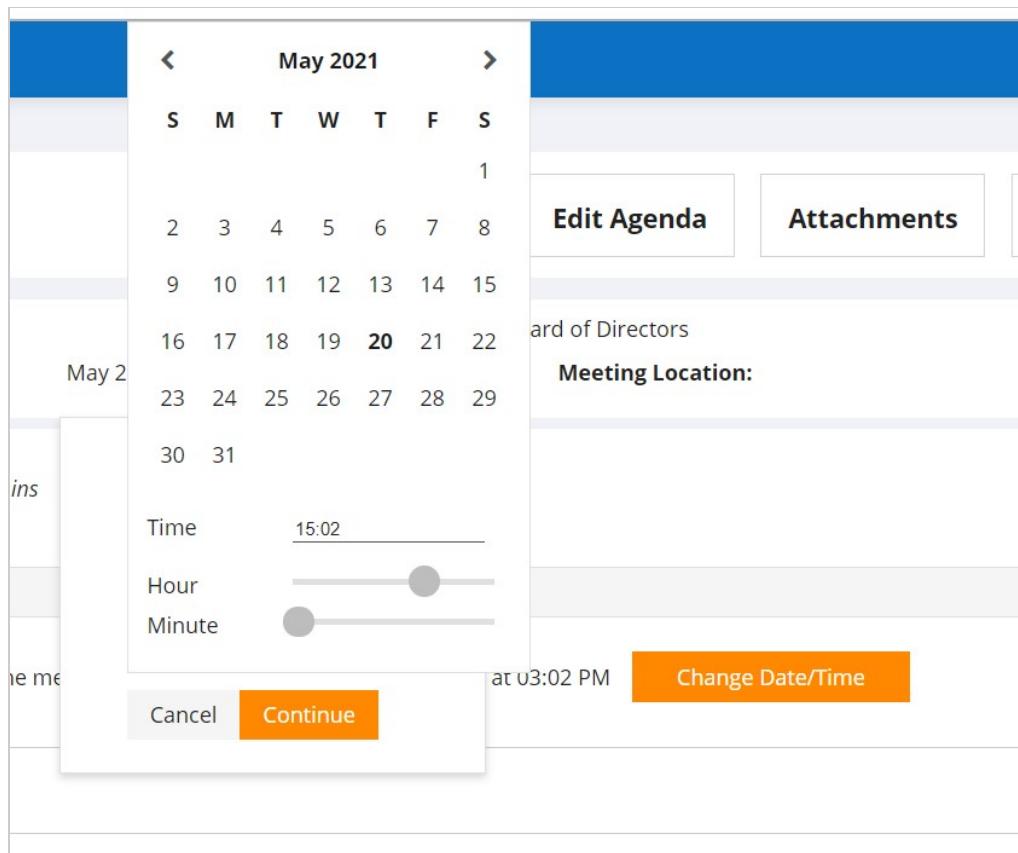
After the meeting has been called to order, I need to change the date and/or time

a) In this scenario, the recording secretary clicks on -	Call To Order
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

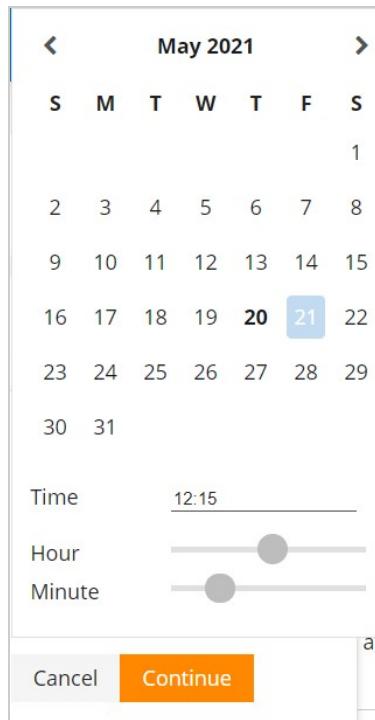
A screenshot of a web application interface. At the top left, there is a small number '1' followed by the text 'Call to Order'. Below this, a message states 'Quorum was confirmed. The meeting was called to order on May 20, 2021 at 03:02 PM'. To the right of this message is a blue rectangular button with the white text 'Change Date/Time'. The rest of the page shows a large, empty text area for notes.

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 screenshot shows a meeting confirmation page. At the top, there is a header with the number '1' and the text 'Call to Order'. Below this, a message states 'Quorum was confirmed. The meeting was called to order on May 21, 2021 at 12:15 PM'. To the right of this message is an orange button labeled 'Change Date/Time'. The rest of the page contains several empty text input fields.

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.

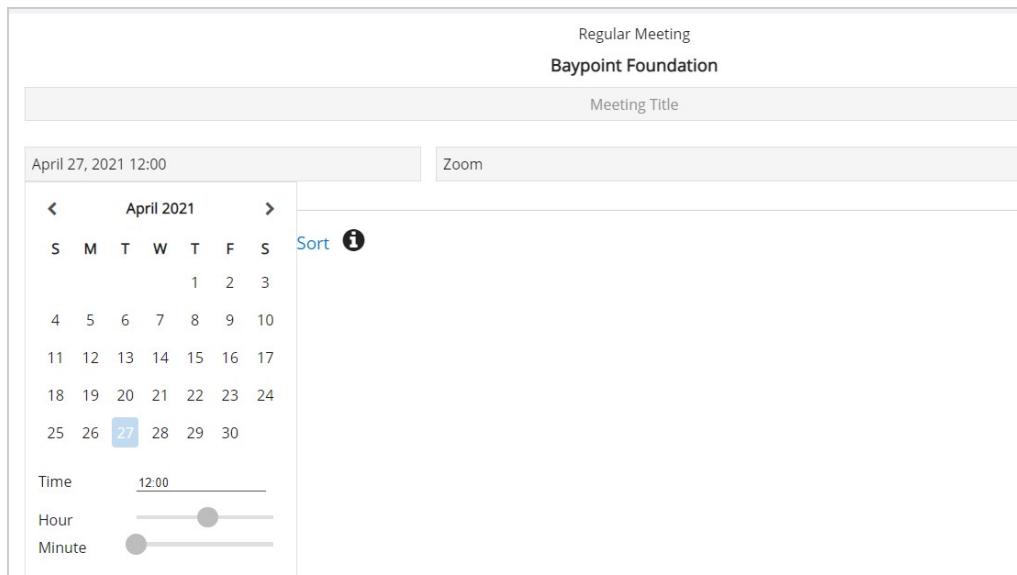


If a user clicks on the date, a popup shows. Clicking in the Time and Date box brings a calendar. Follow the same instructions as in 1 d)

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



The screenshot shows the 'Documents' page with the following interface elements:

- Header:** 'Documents' tab is selected.
- Pinned Documents:** A section containing a single pinned document titled 'Test PDF Feb 3 2023 001.pdf'.
- Search Options:** Buttons for 'Advanced Search', 'Find by meeting date', and 'Pinned Tags'.
- Tag Cloud:** A list of tags including 'Board Agenda', 'Bylaws & Reports', 'Contracts', 'Finance', 'finance111', 'Governance', 'History annual meeting', 'Historyone', 'Insurance', 'Minutes', 'New doc tag', 'Operations', 'Pat's tags', 'Planning', 'Policy', 'Regular tag', 'Reports', and 'Training'.

Pinned Documents

The screenshot shows the 'Pinned Documents' section with the following content:

- Pinned Documents:** A list of pinned files: 'OCSCC 9999 Declaration.pdf', 'Revision Board Attendance Policy.jpg', 'HR Policy.jpg', and 'Untitled design (31).jpg'. Each file has a red star icon next to its name.

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.

The screenshot shows the 'Advanced Search' form with the following fields:

- Search by Document Name:** Input field labeled 'Search document name'.
- Filter by Date or Date Range:** Input fields for 'From date' and 'To date', each with a small trash can icon to clear the input.

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.

Find by meeting date ⓘ

Dec 19, 2022 08:00 PM Nov 21, 2022 01:35 PM Oct 30, 2022 02:26 PM Jun 21, 2022 09:50 AM Jun 08, 2022 10:53 AM

Pinned Tags

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

→ Pinned Tags ⓘ

Contract ★ Correspondence ★ HR Policy ★ + tag...

Pin tags by dragging a tag to

+ tag...

Unpin a tag by clicking on the



Tags organize documents.

Find by tag ⓘ

Annual Meeting Board & Mgrs Only Board Only Contracts Correspondence Finance Governance

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.

▼ Find by tag 

[Annual Meeting](#)

 [Board & Mgrs Only](#)

 [Board Only](#)

[Contracts](#)

[Correspondence](#)

[Finance](#)

Related Tags 

[Governance](#)

[Policy](#)

Clicking on Reset removes all of the added filters.

Create New Tags to add additional tags.

Create New Tags

 Create

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

The screenshot shows the 'Park Lake HOA - Board of Directors' application. The top navigation bar displays the title and the date 'Oct 13, 2023 09:53 AM EDT'. The left sidebar contains icons for Home, Meetings, Agenda, Documents, Events, Find, and Comms. The main content area is titled 'Documents' and features a 'Pinned Documents' section with a list of pinned files. An 'Add Documents' button is located in the top right corner of the main area.

(Click on image to enlarge.)

Pinned Documents

This screenshot shows a list of pinned documents. The first item is 'OCSCC 9999 Declaration.pdf' with a red star icon. The second item is 'Revision Board Attendance Policy.jpg' with a red star icon. The third item is 'HR Policy.jpg' with a red star icon. The fourth item is 'Untitled design (31).jpg' with a red star icon.

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.

Document Name	Date Added	Tags
★ Contract HR.pdf	Dec 15, 2022	Correspondence X Governance X + tag...
★ Contract Proposed.pdf	Dec 15, 2022	Correspondence X Governance X + tag...
★ Contract staff.pdf	Dec 15, 2022	Correspondence X Governance X + tag...

(Click on image to enlarge.)

Advanced search

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

The screenshot shows a search interface with the following elements:

- A dropdown menu labeled "Advanced Search".
- A search bar labeled "Search by Document Name" with the placeholder "Search document name".
- A filter section labeled "Filter by Date or Date Range" with two input fields: "From date" and "To date".
- Two small trash can icons.

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.

The screenshot shows a search interface with the following elements:

- A dropdown menu labeled "Find by meeting date" with a help icon.
- A horizontal list of meeting dates: Dec 19, 2022 08:00 PM, Nov 21, 2022 01:35 PM, Oct 30, 2022 02:26 PM, Jun 21, 2022 09:50 AM, and Jun 08, 2022 10:53 AM.

Pinned Tags

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

The screenshot shows a search interface with the following elements:

- An arrow icon followed by "Pinned Tags" with a help icon.
- A horizontal list of pinned tags: "Contract" (with a red star), "Correspondence" (with a red star), and "HR Policy" (with a red star).
- A dashed rectangular box containing a plus sign and the text "+ tag...".

Pin tags by dragging a tag to



Unpin a tag by clicking on the



Tags organize documents.

The screenshot shows a search interface titled 'Find by tag'. Below the title is a dropdown menu with the option 'Find by tag' and an information icon. A horizontal row of buttons represents different document categories: 'Annual Meeting', 'Board & Mgrs Only' (with a lock icon), 'Board Only' (with a lock icon), 'Contracts', 'Correspondence', 'Finance', and 'Governance'. The 'Correspondence' button is highlighted with a yellow border.

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.

The screenshot shows the same search interface as before, but with the 'Correspondence' tag selected, indicated by a yellow border. Below the search bar, the text 'Related Tags' is followed by two buttons: 'Governance' and 'Policy'. The 'Governance' button is highlighted with a yellow border.

Clicking on Reset removes all of the added filters.

Create New Tags to add additional tags.

The screenshot shows a form for creating new tags. It has a text input field labeled 'Create New Tags' and a large orange 'Create' button to its right.

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.

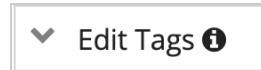
This tutorial covers managing tags.

Once or twice a year it is a good idea to look over the tags and see if fine-tuning is 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.

Edit or Remove

Roffing



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.

Edit or Remove

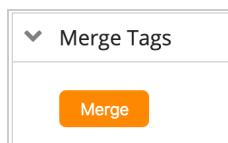
Roofing



changes saved

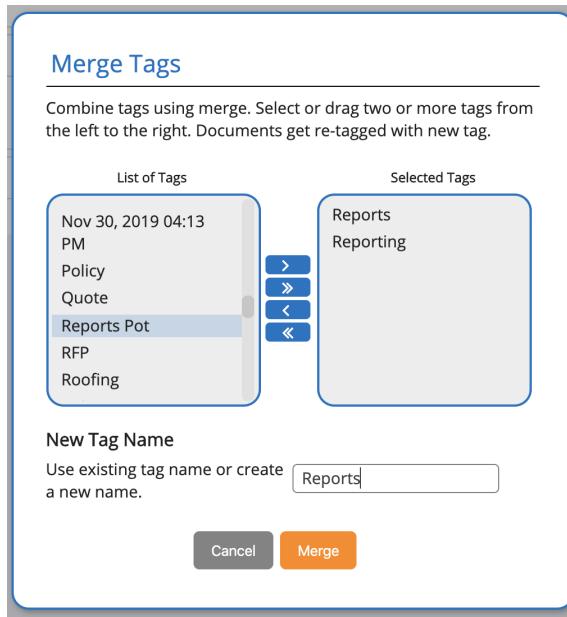
Merging tags

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 no 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.

Date	Time	Location	Type	Status	
Oct 10, 2023	06:00 PM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments
May 04, 2023	01:31 PM ET	Not Set	Regular	Closed	Agenda Smart Minutes Attachments
Mar 03, 2023	07:42 AM ET	room 3425	Regular	Approved	Agenda Smart Minutes Attachments
Feb 03, 2023	03:14 PM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments
Dec 09, 2022	09:41 AM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments
Dec 08, 2022	09:41 AM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments
Jul 26, 2022	11:55 AM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments

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

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.

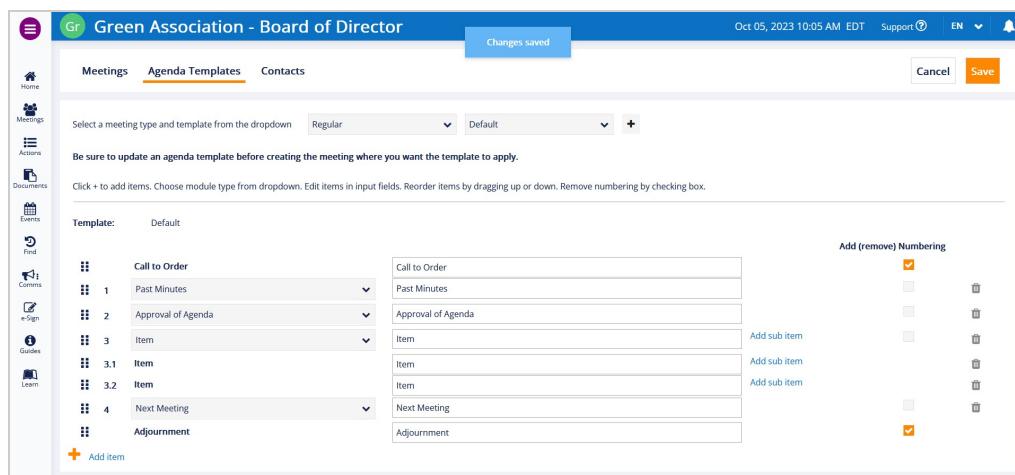
Note: A template must be created before a meeting is created if you want to use

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 it 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 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.

Agenda December 22, 2023 04:00 AM ET

Click + to add items. Choose module type from dropdown. Edit items in input fields. Reorder items by dragging up or down. Remove numbering by checking box.

	Module Type	Duration	Presenter Name/Role	Module Type
1	Call to Order	0 mins	Select Presenter	Start Meetings
2	Approval of Agenda	0 mins	Select Presenter	Approval of Agenda
3	Past Minutes	0 mins	Select Presenter	Approval of Past Minutes
4	Action Review	0 mins	Select Presenter	To-do List Followup
5	Item	0 mins	Select Presenter	Committee Reports
6	Adjournment	0 mins	Select Presenter	Adjournment

+ Add item

(Click on the image to enlarge it.)

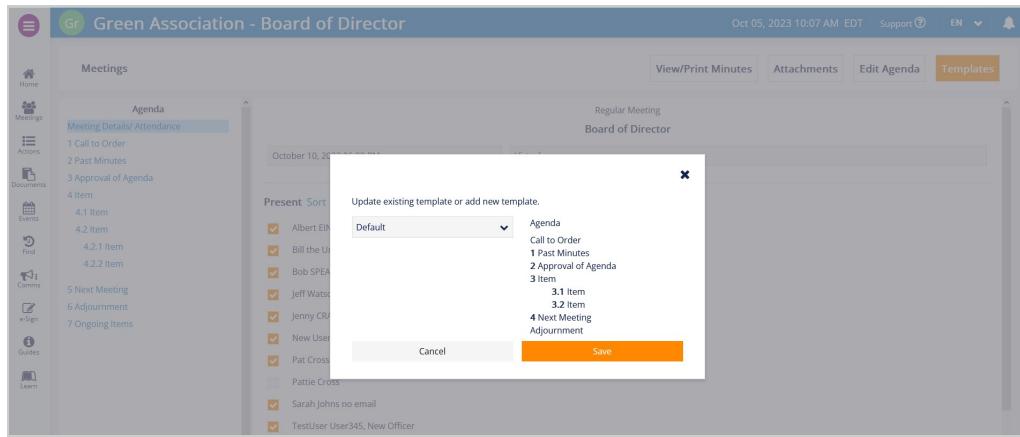
Remember to "**Save**".

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.

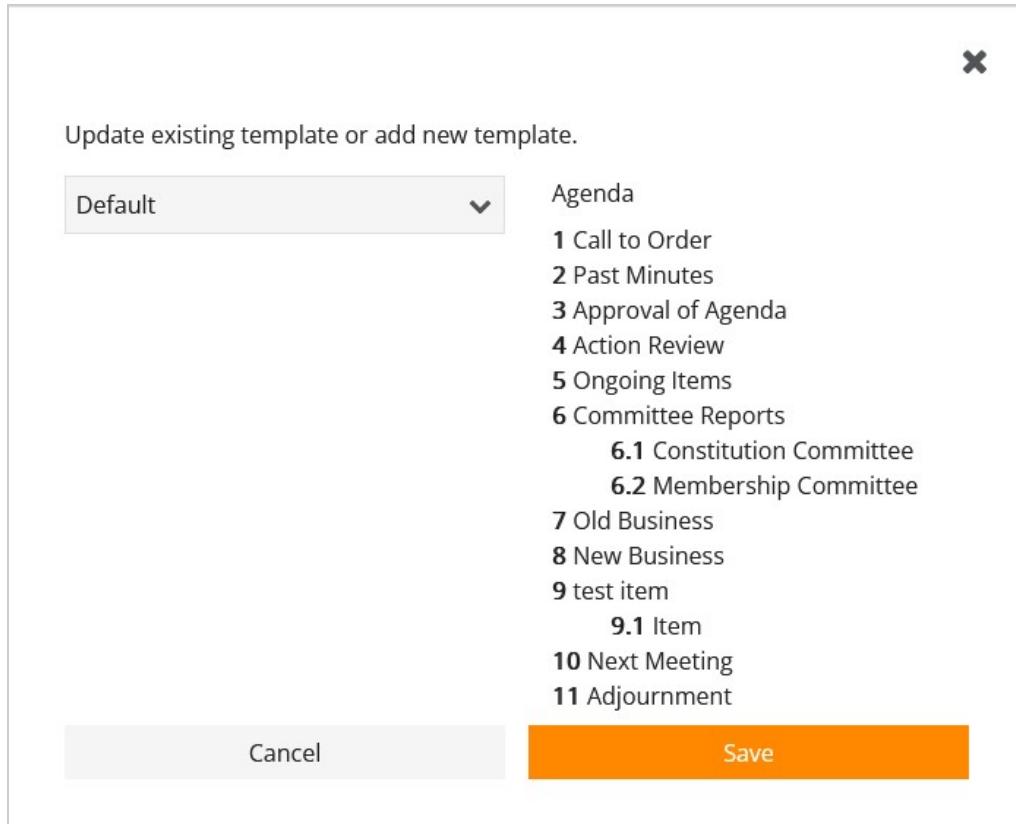
1. The default template was created and then applied to a meeting. In the process of preparing for the meeting, changes were made to the agenda that the secretary wanted to keep use in a subsequent meeting.

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



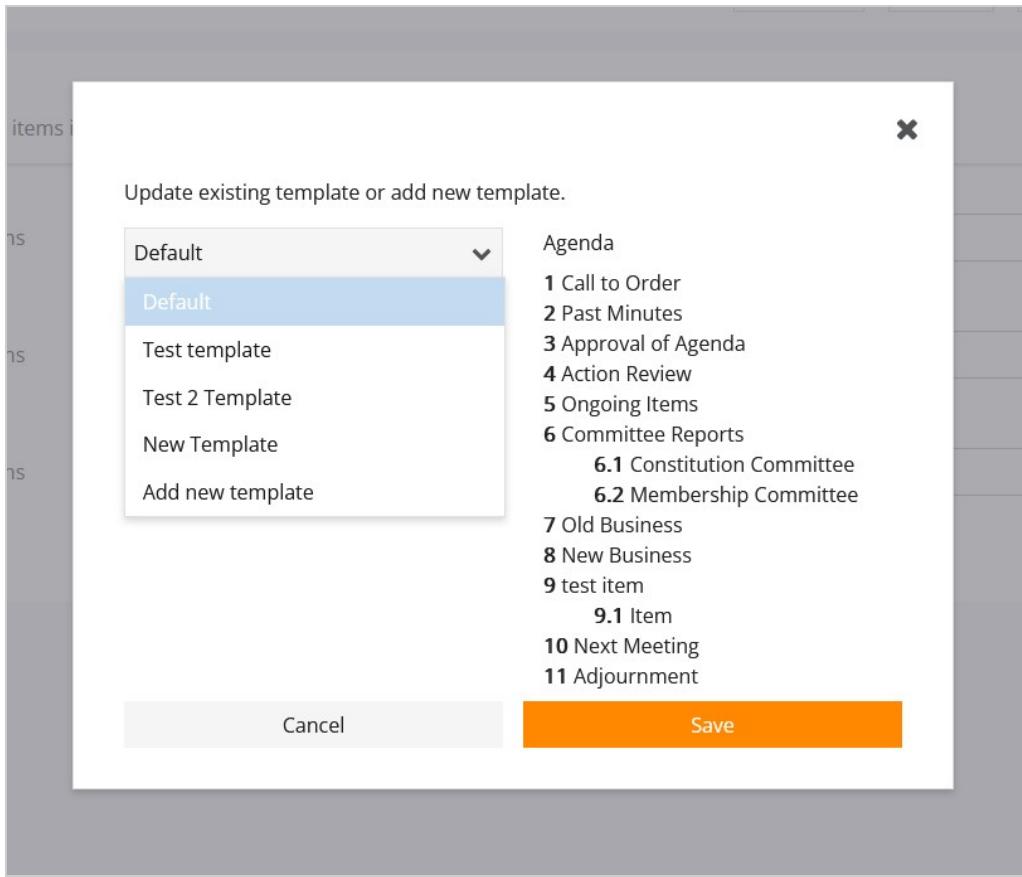
(Click on the image to enlarge it.)

Popups 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)



Support

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.

A screenshot of a Freshdesk support ticket submission interface. The form includes fields for 'Requester' (with a red asterisk), 'Subject' (with a red asterisk), a rich text editor, an attachment section, and a 'How can we help you today?' dropdown. A sidebar on the right provides a search function for the knowledge base and links to browse articles. At the bottom, there are links for 'Help Desk Software by Freshdesk' and 'Privacy Policy', and a 'Send' button.

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.

The screenshot shows the BoardSpace Support Helpdesk interface. At the top, there is a navigation bar with the BoardSpace logo, the text "BoardSpace Support", and links for "Welcome", "LOGIN", and "SIGN UP". Below the navigation bar, there are two main tabs: "Home" and "Solutions". A search bar with the placeholder "Enter your search term here..." and a magnifying glass icon is positioned below the tabs. Below the search bar, there are two links: "Login or Signup to submit a new ticket" and "Check Ticket Status". A large rectangular box on the right side is titled "Knowledge base" and contains a sub-section titled "Tutorials". This section includes a heading "Tutorials (15)" followed by a list of five articles with icons: "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", and "How to take minutes with BoardSpace". At the bottom of this list, there is a link "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.

Committee	Jasmines Weekly Board Meeting
Meeting of the Board of Directors	
Date/Time:	December 26, 2019 16:13
Meeting Location:	Rm 345

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.

Quorum has been established, confirm call to order?

Yes
No

Set time manually

Quorum was confirmed. The meeting was called to order on Jan 14, 2020 at 02:47 PM Change Date/Time

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.

Moved by

Pat Crosscombe ▾

Seconded by

Select one ▾

Approved

Not Approved

- Hello Fresh
- Owen Hart
- Candy Cane
- Kurt Russel
- Chris Gray

Moved by

Pat Crosscombe ▾

Seconded by

Chris Gray ▾

Approved

Not Approved

Carried

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

+ 3 Reports
Policy
3.1
3.1.1

Our treasurer - Davindar Gordon will present this report. He is proposing new policy directions for us to discuss.

Motion:

To approve the policy directions as proposed.

Moved by

Select one ▾

Seconded by

Select one ▾

Approved

Not Approved

Action:

Consult with legal team.

We need to get this done.

Assigned to:

Chris Gray ▾

January 31, 2020

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

and seconds the motion.

Motion:	<input type="text" value="To approve the policy directions as proposed."/>	X				
Moved by	Bill Unicorn	Seconded by	Hello Fresh	Approved	Not Approved	Carried

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

6 Next Meeting

Select the date and time of your next meeting

Set date & time

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

Create New Meeting

Location	Title																																						
BoardSpace	Meeting 2																																						
Time and Date	Meeting Type																																						
January 23, 2020 12:48	Regular																																						
<input type="button" value="January 2020"/> <table border="1"> <tr><td><</td><td>January 2020</td><td>></td></tr> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td></tr> </table>		<	January 2020	>	S	M	T	W	T	F	S	5	6	7	1	2	3	4	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
<	January 2020	>																																					
S	M	T	W	T	F	S																																	
5	6	7	1	2	3	4																																	
12	13	14	15	16	17	18																																	
19	20	21	22	23	24	25																																	
26	27	28	29	30	31																																		
Time	12:48																																						
Hour	<input type="button"/>																																						
Minute	<input type="button"/>																																						

Clic
k

Schedule

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

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

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

Confirm yes. The meeting is adjourned.

Confirm adjournment?

Set time manually

What are the blue bubbles?

1 Call to Order
This meeting has not been called to order



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 or . Enter text and .

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

Replies 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

Date Issued	Date Due	Assigned To	Title	Complete
May 14, 2019	March 05, 2020 May 15, 2019	Jane Shamatia	Get two quotes for roofing.	<input type="checkbox"/>
October 28, 2019	February 13, 2020	Jane Shamatia	Status Certificate for Units	<input checked="" type="checkbox"/>
October 22, 2019	October 04, 2019	Pat Crosscombe	Paperwork for dedicated parking authority	<input type="checkbox"/>

Step 3

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

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

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.

				New Action
Date Issued	Completed	Assigned To	Title	Undo Complete
October 28, 2019	November 11, 2019	Jane Shamatia	Status Certificate for Units	<input type="checkbox"/>
August 02, 2019	November 11, 2019	Jeff Watson	Follow up with lawyer	<input type="checkbox"/>
October 18, 2019	November 11, 2019	Jeff Watson	Get 750 on freshdesk	<input type="checkbox"/>

Step 2

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

				New Action
Date Issued	Date Due	Assigned To	Title	Complete
May 14, 2019	March 05, 2020 May 15, 2019	Jane Shamatia	Get two quotes for roofing.	<input type="checkbox"/> X
October 28, 2019	February 13, 2020	Jane Shamatia	Status Certificate for Units	<input type="checkbox"/> X
October 22, 2019	October 04, 2019	Pat Crosscombe	Paperwork for dedicated parking authority	<input type="checkbox"/> X

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.

My Actions					Date Issued	Date Due	Assigned To	Title	Comment	Save	Cancel	Search	New Action
Feb 03, 2023	Apr 04, 2023	Albert EINSTEIN (Lead)	Pat Crosscombe	Bill the Unicorn Ward	Get Bill to review policies								
Jun 22, 2023	Jun 24, 2023	Pat Crosscombe (Lead)	Jeff Watson	Albert EINSTEIN	Test Action								
Jul 07, 2023	Jul 07, 2023	Bob SPEARS (Lead)	Pat Crosscombe		Find new auditor								
Sep 18, 2023	Oct 18, 2023	Pat Crosscombe (Lead)	Jeff Watson		find x								

(Click on image to enlarge.)

Go
to

Actions

1. How to add an Action

Click
on

New Action

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.

Title

Description

Due Date

Assigned To

Select Person 

Cancel **Save**

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.

Actions **Details** **Comments**

Title 
Get Bill to review policies

Description 
A thorough review is needed.

Issued Feb 03, 2023

Due Date Apr 04, 2023

Revised Date **Update** **Complete**

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

Click on Undo complete and revise the due date.

Title
Update website

Description
Update website with new board elections and Halloween Party Event info.

Issued Jan 10, 2022

Due Date Jul 26, 2022 ~~Jan 27, 2022~~

Undo complete

3. Edit an Action

Click on the pencil icons to edit Title or Description.

Actions **Details** **Comments**

Title Prepare Finance Report

Description Need to get started on this.

Issued Mar 27, 2019

Assigned To
Jessie Tellson
Select User **Re-assign**

Due Date Apr 10, 2019
Revised Date **Delay**

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

Assigned To

Albert EINSTEIN (Lead) Pat Crosscombe Bill the Unicorn Ward

Select Person

Select Person

4. Add Comments

Add text and click Add.

Actions Details Comments

Write a Comment...

Pat Crosscombe Oct 02, 2023 Could anyone suggest a new auditor?

Pat Crosscombe Feb 25, 2022 Action delayed

5. Delete an Action

Actions can be removed by clicking on the and clicking 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.

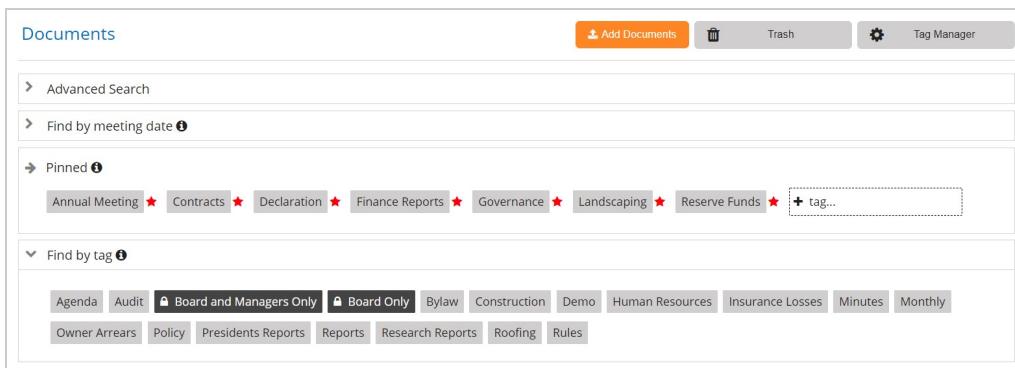
How to use pinned tags

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

The screenshot shows the 'Annual Planner' interface. It lists four events:

Event Date	Event Name	Reminder Date	Recur
October 16, 2019	Renew Snow Contract - on Aug 17 this reminder will roll over to Sept 16	October 13, 2019	1 Months
May 01, 2020	Prep for AGM	April 01, 2020	1 Years
June 01, 2020	Review Contracts	May 01, 2020	1 Years
October 01, 2020	Recruit new directors	July 01, 2020	1 Years

A modal dialog is open for the 'Prep for AGM' event, showing a dropdown menu with 'Nov 12, 2019 05:00 PM' selected, and buttons for 'Cancel' and 'Add'.

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

The screenshot shows the meeting agenda. At the top, there is a header '7 Ongoing Items'. Below it, under 'New Items', there is a list:

- + 7.1 Prep for AGM

When you click on 'Prep for AGM', a detailed view is shown in a box:

- 1. Ensure financial audit is finalized
- 2. Book room for AGM.
- 3. Engage recording secretary.
- 4. Prepare documents in BoardSpace.

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.

3 Ongoing

Contents do not appear in approved minutes

▼ Prep for AGM

Carry forward

1. Ensure financial audit is finalized
2. Book room for AGM.
3. Engage recording secretary.
4. Prepare documents in BoardSpace.

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.

3 Ongoing

Contents do not appear in approved minutes

▼ Prep for AGM

Carry forward

1. Ensure financial audit is finalized
2. Book room for AGM.
3. Engage recording secretary.
4. Prepare documents in BoardSpace.

New Items**+ 3.1**

Prep for AGM(cont)

text

motion

action

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.

3 Ongoing

New Items

+ 3.1 New ongoing item title

Eye icon

+ New Item

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

To include the item in the minutes click on Carry forward

2 Ongoing

Contents do not appear in approved minutes

Bylaw Revision

Carry forward

The board is planning to revise several bylaws.

New Items

+ 2.1 Bylaw Revision(cont)

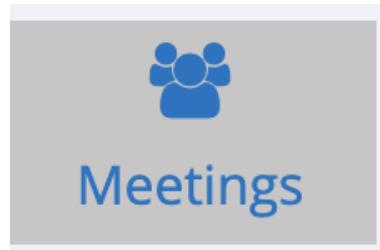
The item Bylaw Revision has been added as 2.1.

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

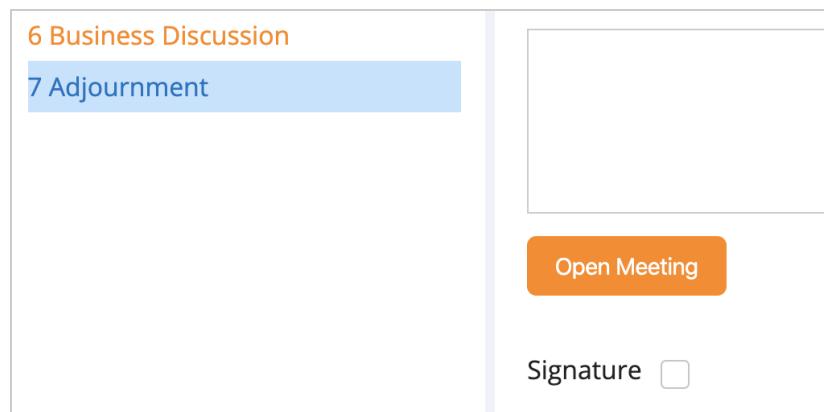
Step 1

Go to Meetings



Step 2

Click on "Open meeting".

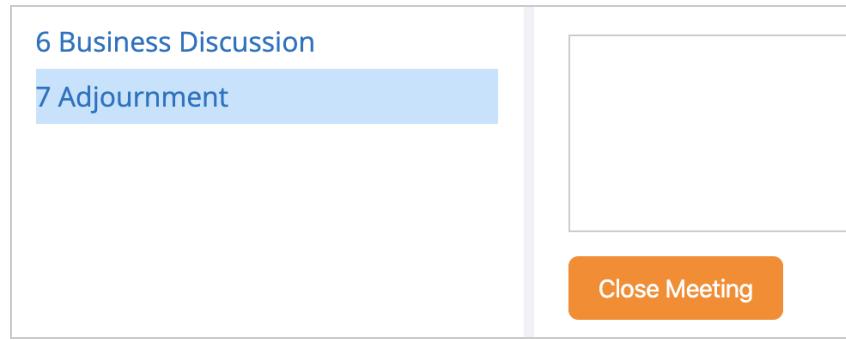


Step 3

Do any changes you need to do

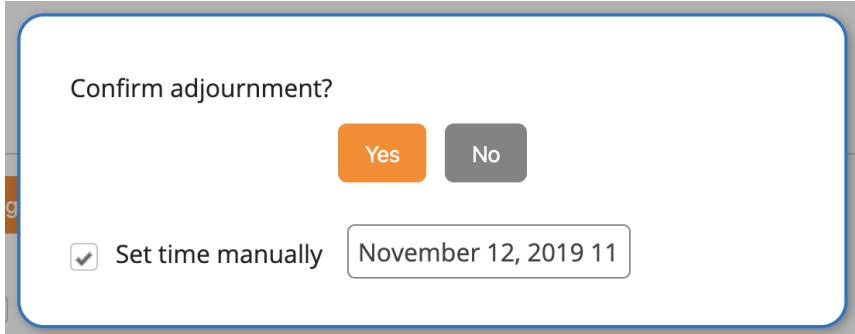
Step 4

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,

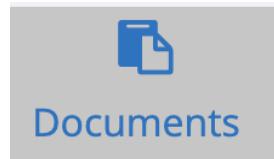
Step 1

Create the meeting

Create New Meeting

Step 2

Go to documents



Step 3

Drag the 2nd meeting date tag to the appropriate document

Document Name	Date Added	Tags
451 Edison Gate.rtf	May 24, 2018	Bylaw ✖ Construction ✖ Governance ✖ Nov 13, 2019 11:52 AM ✖ Oct 18, 2019 10:33 AM ✖ Report ✖ test tag ✖ + tag...
DSCN1605 ver 2.JPG	May 26, 2018	Construction ✖ Nov 01, 2019 06:27 AM ✖ Policy ✖ Report ✖ Roofing ✖ Sep 05, 2019 09:58 AM ✖ WWW ✖ Jan 16, 2020 05:51 PM ✖ + tag...
DSCN1608.JPG	May 26, 2018	Agm minutes ✖ Blog ✖ Declaration ✖ Nov 01, 2019 06:27 AM ✖ Oct 23, 2017 01:11 PM ✖ Policy ✖ Roofing ✖ + Oct 31, 2019 10:33 AM ✖
DSCN1609.PNG	May 26, 2018	Blog ✖ Declaration ✖ Nov 01, 2019 06:27 AM ✖ Policy ✖ Roofing ✖ + tag...
DSCN1606.JPG	May 26, 2018	Declaration ✖ Nov 01, 2019 06:27 AM ✖ Policy ✖ Roofing ✖ + tag...

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.

The screenshot shows a software interface for managing agenda items. At the top, it says '+ 4 Executive Director's Report'. The first item is a motion: 'we move that the executive director create a more detailed report!'. It has a status bar with 'Approved' (highlighted in orange) and 'Not Approved'. Below it is an action: 'Executive Director Detailed Report'. This action has a status bar with 'Carried'. Both items have small icons on the left: a magnifying glass for viewing details and up/down arrows for reordering. The third item in the list is partially visible.

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 be deleted.
Drag modules to the agenda and drop in place. Reorder modules by dragging them up or down.

Modules

Agenda Mar 15, 2019 11:27 AM

Module Number	Module Title	Description	Checkmark	X
1	Call to Order	Call to Order	<input type="checkbox"/>	
2	Approval of Agenda	Approval of Agenda	<input type="checkbox"/>	X
3	Event Planning	Item	<input type="checkbox"/>	X
4	Executive Director's Report	Item	<input type="checkbox"/>	X
5	Action Review	Action Review	<input type="checkbox"/>	X
6	Committee Reports	Item	<input type="checkbox"/>	X
7	Next Meeting	Next Meeting	<input type="checkbox"/>	X
8	Adjournment	Adjournment	<input type="checkbox"/>	

Cancel **Save**

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

- Pat Crosscombe
- Log Off
- HQ
- Hub
- Board Settings
- People
- Recording Secretary

Step 2

Edit the information

Edit

Step 3

Click **Save**.

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 document's 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 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	<ul style="list-style-type: none">  Pat Crosscombe  Log Off  HQ  Hub  Board Settings  People  Recording Secretary

Step 2

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



First Name	Last Name	Email Address	Title	Admin	Director	Officer	Other	Special
Pat	Crosscombe	pat@boardspace.ca		Yes	Yes			
Jeff	Watson	jeff@boardspace.ca	Director	Yes	Yes			
Bill the Unicorn	Ward	bill@boardspace.ca	Vice President		Yes			

Step 3

Edit the fields as desired to change the name

Green Association - Board of Director

Oct 05, 2023 11:27 AM EDT Support EN Save

People

How to manage accounts

First Name	Last Name	Email Address	Admin Privileges	Position	Position Description	Title	Term Length	Term Start	Term End
				Director	Voting member				
				Officer	Non-voting member				
				Other	Owner (condo or HOA) or Member (of a non-profit or charity)				
				Special	Professionals such as a lawyer, accountant or engineer.				

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.

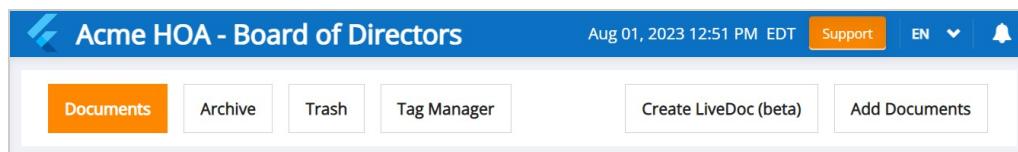
We released it in beta because we wanted to get user feedback before working further on its development.

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

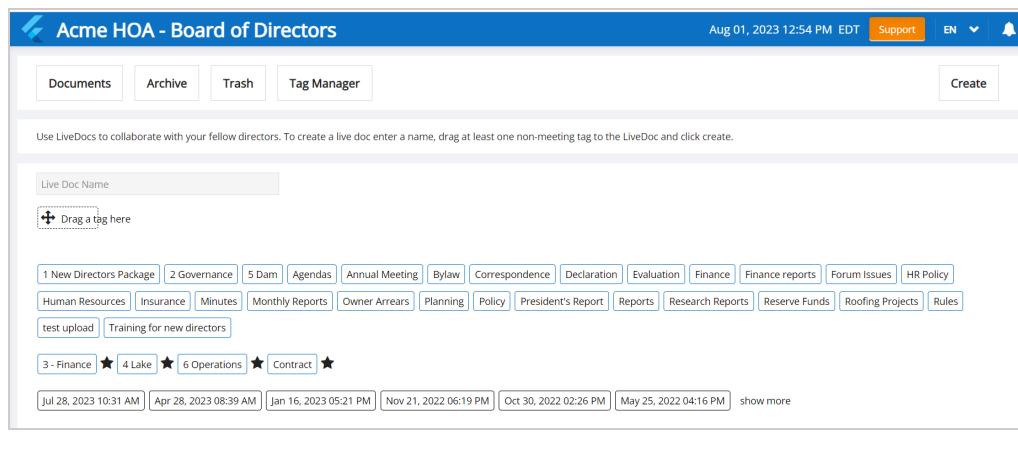
Getting Started

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.

The screenshot shows the 'Pad Settings' interface. At the top, there's a section titled 'My View' containing several toggle switches:

- Chat always on screen
- Show Chat and Users
- Authorship colors
- Line numbers
- Read content from right to left?
- Show Comments

Below these are two dropdown menus:

- Font type: Normal
- Language: English

At the bottom, there's an 'About' section with the text 'Powered by [Etherpad](#)'.

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

The screenshot shows the 'Import/Export' section of a LiveDoc. At the top, there are several icons: a three-line menu, a refresh, a star, a gear, and a user icon with '1'. Below this, the title 'Import/Export' is displayed in green. A sub-instruction 'Upload any text file or document' follows. A 'Choose File' button is shown with the message 'No file chosen'. A large green 'IMPORT NOW' button is centered below the file input field. To the right, the text 'Export current pad as:' is followed by a list of export options, each with an icon: Etherpad, HTML, Plain text, Microsoft Word, PDF, and ODF (Open Document Format).

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.

The screenshot shows a document editor interface. On the left, there is a block of Latin text. A portion of this text, "Pellentesque viverra", is highlighted with a blue background. On the right, a modal window titled "Comment" is displayed. It contains a text input field, a toggle switch labeled "Include suggested change" which is turned off (gray), and two buttons at the bottom: "COMMENT" (green) and "CANCEL".

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

The screenshot shows a document editor interface. On the left, there is a block of Latin text. A portion of this text, "Pellentesque viverra", is highlighted with a blue background. On the right, a user's comment is shown: "Pat Crosscombe Not correct.".

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 screenshot shows a document editor interface. On the left, there is a block of Latin text. A portion of this text, "Andything placera", is highlighted with a yellow background. On the right, a user's comment is shown: "Pat Crosscombe Not correct.".

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.

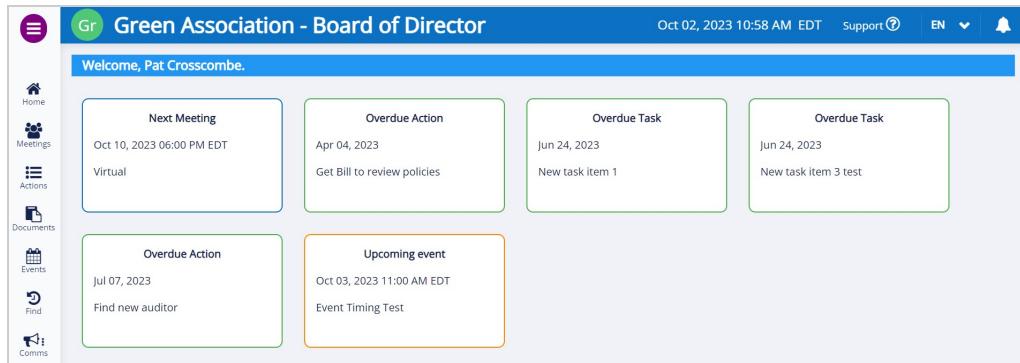
Understanding the Home page

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

What else is the board up to?

Approved Meeting Dec 20, 2021 04:16 PM EDT Virtual	Closed Meeting May 25, 2022 04:16 PM EDT Virtual	New Meeting Jun 08, 2022 04:30 PM EDT Ex. Consent Agenda	New Meeting Aug 18, 2022 08:00 PM EDT
New Meeting Sep 05, 2022 04:00 PM EDT Ex. Collaborate	Overdue Action Oct 22, 2021 Prepare Report	Overdue Action May 16, 2022 Followup with Annual Audit	

(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?

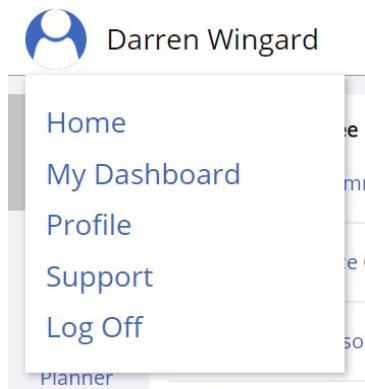
If a person has been added as a manager to one committee and a manager to another committee then I'm pretty sure that I'm correct in saying that unless a staff person, such as Joe McCabe has an official position as an officer of the board he should be a manager and identified with his job title.

Board/ Committee	Date	Time	Meeting Location
Main MG HR Committee			
MG Finance Committee			
Cornell Association			
Glendale Association - Test of Recurring Events			
Green Valley - Test of Ongoing Items			
1800 Wilson Boulevard Condominium			

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.

Board/ Committee	Date	Time	Meeting Location
Main MG HR Committee			
MG Finance Committee			
Cornell Association			
Glendale Association - Test of Recurring Events			
CP Board of Directors			
Green Valley - Test of Ongoing Items			
1800 Wilson Boulevard Condominium			

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**

The screenshot shows a search interface titled "Find by tag" with an information icon. Below the title is a list of tags arranged in four rows. The first row contains: 1 New Directors Package, 2 Governance, 5 Dam, Agendas, Annual Meeting, Bylaw, Correspondence, Declaration. The second row contains: Evaluation, Finance, Finance reports, Forum Issues, HR Policy, Human Resources, Insurance, Minutes, Monthly Reports. The third row contains: Owner Arrears, Planning, Policy, President's Report, Reports, Research Reports, Reserve Funds, Roofing Projects, Rules. The fourth row contains: test upload, Training for new directors, Board Only, Board & Mgrs Only.

1 New Directors Package	2 Governance	5 Dam	Agendas	Annual Meeting	Bylaw	Correspondence	Declaration	
Evaluation	Finance	Finance reports	Forum Issues	HR Policy	Human Resources	Insurance	Minutes	Monthly Reports
Owner Arrears	Planning	Policy	President's Report	Reports	Research Reports	Reserve Funds	Roofing Projects	Rules
test upload	Training for new directors	Board Only	Board & Mgrs Only					

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.

The screenshot shows the same "Find by tag" interface as the previous one, but with a "Related Tags" section below it. The "1 New Directors Package" tag is highlighted in blue. Below it, a list of related tags is shown in a horizontal row: Forum Issues, President's Report, Research Reports, Training for new directors.

1 New Directors Package	2 Governance	5 Dam	Agendas	Annual Meeting	Bylaw	Correspondence	Declaration	
Evaluation	Finance	Finance reports	Forum Issues	HR Policy	Human Resources	Insurance	Minutes	Monthly Reports
Owner Arrears	Planning	Policy	President's Report	Reports	Research Reports	Reserve Funds	Roofing Projects	Rules
test upload	Training for new directors	Board Only	Board & Mgrs Only					

Related Tags

1 New Directors Package	Forum Issues	President's Report	Research Reports	Training for new directors
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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	<p>These meetings are attended by the board's directors, officers, managers and staff.</p> <p>They are usually held on a monthly basis could also be held more or less frequently.</p>
Regular (without attendance)	<p>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.</p> <p>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.</p>
Annual or Annual General	<p>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.</p> <p>Some functions that are available for regular meetings are not available for this meeting type. This includes motions and the calculation of quorum.</p>
Special	<p>Special meetings are any meetings held during the year (other than the annual meeting) that are held for the owners or members.</p> <p>Some functions that are available for regular meetings are not available for this meeting type. This includes motions and the calculation of quorum.</p> <p>DO NOT USE for meetings where only the board of directors will be attending.</p>

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 Privileges

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.

Role	Documents			Actions			Minutes			
	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?

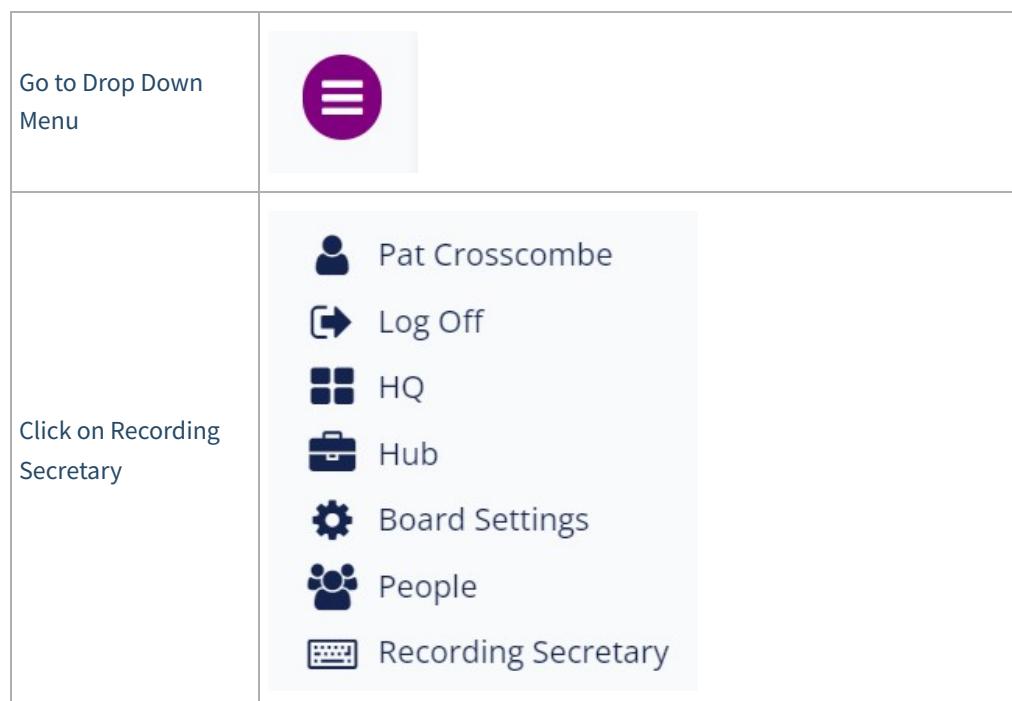
Created by Pat Crosscombe, Modified on Thu, 05 Oct 2023 at 12:24 PM by Pat Crosscombe

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.

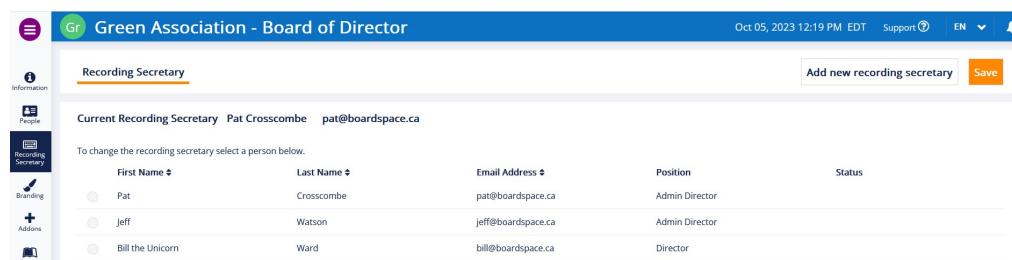
To become the recording secretary and see the create meeting button:

Step 1

Go to Board Settings



Step 2



Green Association - Board of Director

Recording Secretary

Current Recording Secretary Pat Crosscombe pat@boardspace.ca

To change the recording secretary select a person below.

First Name	Last Name	Email Address	Position	Status
Pat	Crosscombe	pat@boardspace.ca	Admin Director	
Jeff	Watson	jeff@boardspace.ca	Admin Director	
Bill the Unicorn	Ward	bill@boardspace.ca	Director	

Step 3

Click on the radio button beside your name

<input checked="" type="radio"/> Pat	Crosscombe	pat@boardspace.ca
--------------------------------------	------------	-------------------

Step 4

Click Save

You will see that you are now the new recording secretary

Current Recording Secretary Pat Crosscombe pat@boardspace.ca

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.

Date	Time	Location	Type	Status	More
Oct 10, 2023	06:00 PM ET	Virtual	Regular	New	Agenda Smart Minutes Attachments Print
May 04, 2023	01:31 PM ET	Not Set	Regular	Closed	Agenda Smart Minutes Attachments Print
Mar 03, 2023	07:42 AM ET	room 3425	Regular	Approved	Agenda Smart Minutes Attachments Print
Feb 03, 2023	03:14 PM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments Print
Dec 09, 2022	09:41 AM ET	Not Set	Regular	Approved	Agenda Smart Minutes Attachments Print

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 everyone, only directors, only managers, or even to a specific group of people.

Upcoming events are displayed on the Home page

Upcoming event

Oct 16, 2023 08:00 PM EDT

Prep for AGM

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