OnBase®

Foundation EP5

Agenda

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Copyright

Document Name .... Agenda
Department/Group .... Documentation
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Overview

OnBase Agenda is used to coordinate and automate the labor-intensive tasks of agenda and minutes management and distribution. Agenda users can manage all of the elements that make up a meeting, including participants, the agenda, and meeting minutes. Users can also generate an agenda, a meeting packet (including supporting documents), and/or meeting minutes for distribution to meeting participants. These generated documents can then be archived in OnBase for long-term storage.

Note: The Thai Locale is not currently supported by the Agenda client.

Applications

Any organization that holds meetings can use Agenda to revolutionize the meeting process. The time, frustration, and cost of paper and e-mail based processes are replaced by convenient access to in-process and published agendas, meeting packets, and minutes documents. The time spent preparing for meetings is reduced, which frees those tasked with managing agendas and minutes for higher value tasks.

Agenda leverages other OnBase modules, including Workflow.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Agenda functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 1.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 2.

Simplified Licensing

The Premier User license is required.

In addition to the Premier base package license for standard OnBase functionality, the OnBase Agenda add-on license is required to access standard Agenda functionality.

Legacy Licensing

The following licenses are required to use Agenda:

- Agenda Management license
- A Named User Client license
- A valid Client license
- An EDM Services license
- A PDF Framework license to add text overlays, link attachments, and add bookmarks
- Workflow licensing to create and route agenda items for review and approval
- The Unity Forms license to create agenda item templates used to create agenda items

Note: When Agenda and Minutes are running on the same machine at the same time, Minutes shares the Agenda Minutes Concurrent license with Agenda. Check your current licensing status by selecting **Utils | Product Licenses** from the Configuration module.

OnBase®
Foundation EP5

Agenda

Installation Guide

Requirements

The following sections outline requirement information specific to Agenda in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Agenda and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- Databases Supported
- Database Client/Server Compatibility
- Microsoft Visual C++ Requirements
- Hyland Software - Microsoft Service Pack Statement
- Third-Party Software Compatibility
- About Virtual Environments
- 64-Bit Support Statement
- Windows User Account Control Statement

Caution: If you are using a Sybase database with your Agenda solution and require more than 32k of data in the agenda or section text fields, increase the TEXTSIZE server variable in your Sybase database.

Agenda Client Hardware and Browser Requirements

Component	Minimum	Recommended
CPU	1.6 GHz dual-core	2.4 GHz dual-core
Memory (RAM)	2 GB	4 GB
Free Hard Disk Space (for installing and running the Unity Client)	450 MB	

Component	Minimum	Recommended
Screen Resolution	1024 x 768 (1280 x 800) **Note:** Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)
Graphics Card	128 MB	256 MB with hardware acceleration support
Web Browser	Microsoft Internet Explorer 11.0	Because some versions of Internet Explorer are not supported on all operating systems supported by OnBase, Windows 8.1: IE 11 is recommended.
Email Platform	Lotus Notes 8.0.2 or 8.5 IBM Notes 9 Microsoft Outlook 2013 Novell GroupWise 8 or 12 **Note:** When sending messages with Novell GroupWise, Plain Text is the only format available.	
Media Player	Windows Media Player 10	

Agenda Online Web Site Hardware and Browser Requirements

To run the Agenda Online public-facing Web site, a user's workstation must meet the following requirements:

Agenda Online Component	Minimum	Recommended
CPU	1 GHz	
Memory (RAM)	1 GB	2 GB or greater
Free Hard Disk Space	200 MB	

Agenda Online Component	Minimum	Recommended
Screen Resolution	1024 x 768 (1280 x 800) **Note:** Using a lower resolution may result in a loss of functionality.	1920 x 1080
Web Browser	• Edge 92 • Firefox® 91 **Note:** The JWPlayer is not supported in the Android version of Firefox. • Chrome 92 • Safari 14.1.1 **Note:** Earlier versions of each browser may work, but are not officially supported. If issues arise, upgrade your browser as a first troubleshooting step. Microsoft ASP.NET MVC 4 is required for Agenda Online to function.	

Licensing

See Licensing on page 1 for licensing requirements.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

Agenda Upgrade Information

The following information should be considered or noted when upgrading Agenda deployments. Read this information prior to upgrading your version of OnBase.

Agenda Numbering

When upgrading Agenda, you must configure the numbering in the Agenda Administration module.

Agenda Item Unity Forms

- To use Agenda Item Unity forms, you must implement a new workflow and build Unity form templates for Agenda Items.
- Agenda Forms are no longer supported for Integrations.

Agenda Online Upgrade Information

The following information should be considered or noted when upgrading Agenda Online deployments. Read this information prior to upgrading your version of OnBase.

Note: This module also requires the EDM Services license, which may have additional upgrade considerations.

Server Machine Considerations

The following should be considered with regard to server machines:

- Update the Web.config file with the **SessionUser**, **SessionPassword**, and **Datasource** information.
- Manually start the Hyland Data Capture Server Service.

Updating Page Maps

If you are using custom or page map pages for Agenda Online, you must update them according to the files that are placed during the installation. The updated pages are listed below:

- \\Views\Meetings\ViewMeeting.cshtml
- \\Views\Shared_Layout.cshtml
- \\Views\Shared_MeetingGrid.cshtml
- \\Views\Shared_MeetingSearch.cshtml

Full Text Searching

Before you can use the full text search feature in Agenda Online, you must first install and configure the full text server.

Media Streaming Privileges

This version of Agenda Online has additional Upgrade Considerations when upgrading to it from one of the following earlier versions:

- Any pre-Foundation releases prior to 18 SP 1, Build 250
- Foundation EP1
- Foundation EP2
- Foundation EP 3
- Foundation EP 4

When upgrading from any of these versions, you must ensure that all instances of Agenda Online are also upgraded to the new version.

In this version, the Media Streaming privilege was added to add a level of security to media streaming. This privilege must be enabled for the User Group to which Media Publisher, Minutes, and Agenda Online users are assigned in order to run the Media Publisher Service, and to provide media access in Minutes and Agenda Online. When media is accessed, a privilege check is performed on the media service methods. Only those users belonging to a User Group with the Media Streaming privilege enabled will have the ability to stream media.

This setting must be configured for the user groups to which the Media Publisher, Minutes, and Agenda Online users belong in order to run a meeting with media (most users are assigned to different user groups, so this setting may need to be configured for several user groups). See the **Agenda Media** module reference guide for more information on enabling the Media Streaming privilege.

Installation

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\\"my value\\" INSTALL_PROPERTY_2=\\"my value 2\\""**.

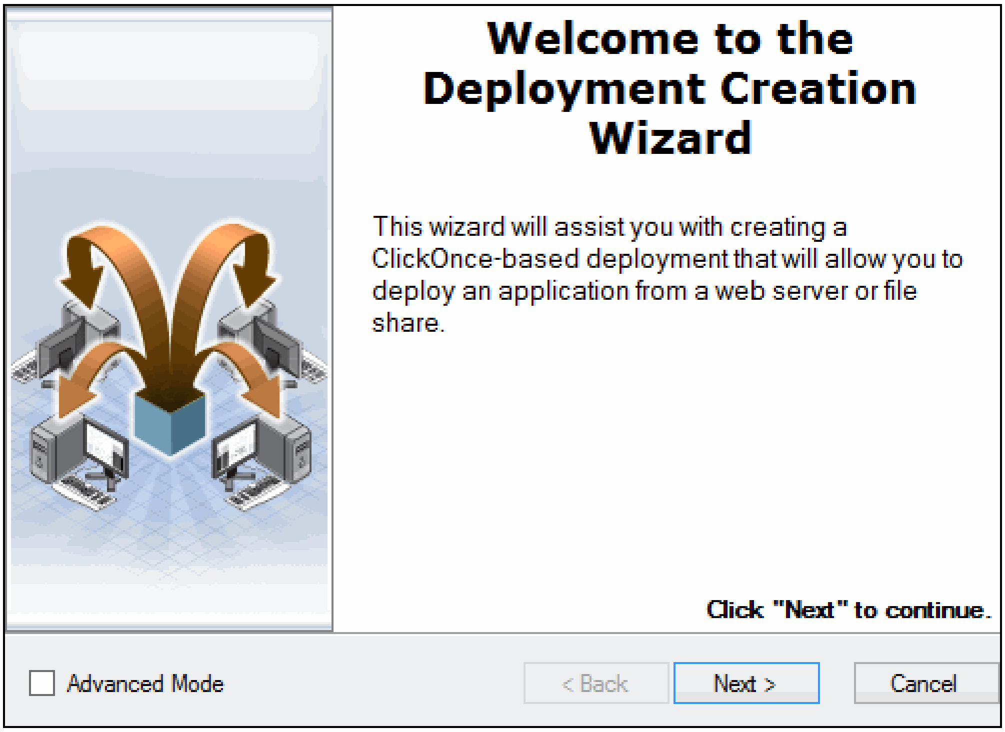
Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

ClickOnce Deployment

To install a ClickOnce Deployment of the Agenda:

1. In the **..\install\ClickOnce\Agenda** folder of the build, double-click on **Hyland Agenda Deployment.msi**.
2. Click **Next**.
3. Click **Install**.

4. Click **Launch** or **Finish**, depending on the module being installed. The **Welcome to the Deployment Creation Wizard** dialog is displayed.



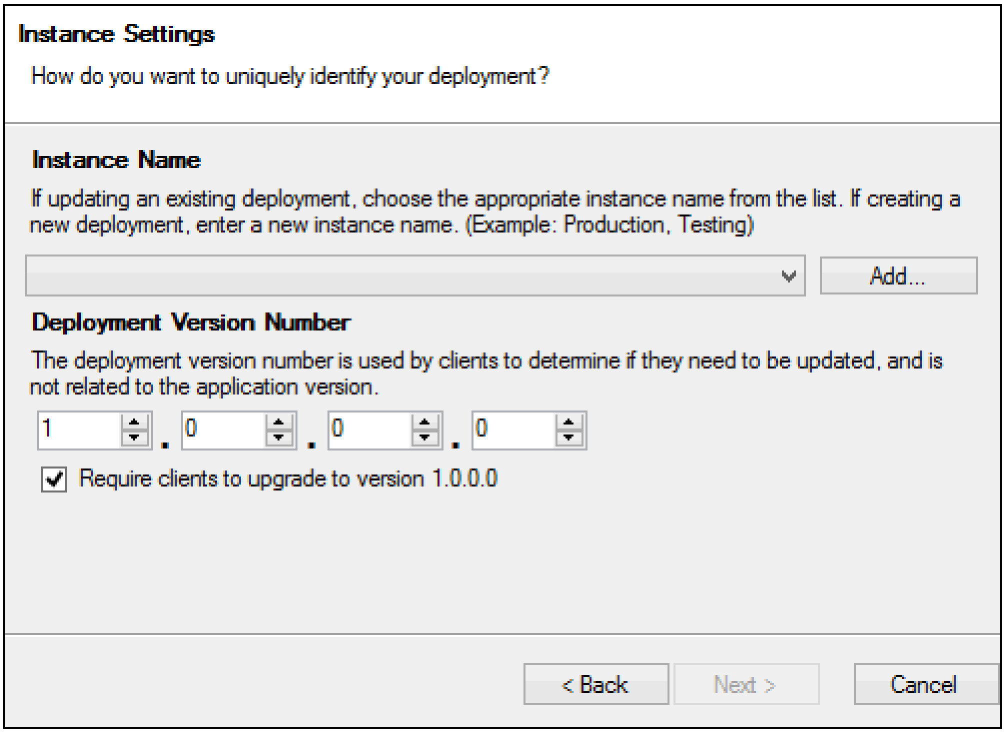
Select **Advanced Mode** to enable the ability to update certain aspects of the installation where the default values are populated by the installer. Not selecting this option automatically uses the default values populated by the installer.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

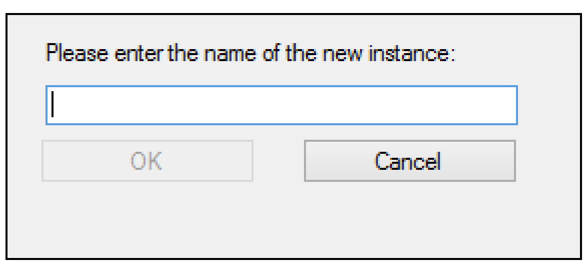
Note: If your servers are configured to use an HTTPS binding, or you are going to enable Active Directory or LDAP Authentication, you should enable **Advanced Mode** in order to be able to configure these options in your deployment.

5. Click **Next**. The **Instance Settings** dialog box is displayed.

Note: If the **Package Selection** dialog box is displayed, select the package to deploy then click **Next** to reach the **Instance Settings** dialog box.



6. Select the name of the application instance from the drop-down list under the **Instance Name** section. To create a new instance name:
   a. Click the **Add** button to the right of the drop-down list. The **Create New Instance** dialog box is displayed.



Note: If you create a new instance name for an existing deployment, the package must be redeployed to client machines under the new instance name.

b. Enter a name for the new instance in the field provided. The name entered is used to distinguish this deployment from other deployments, so it must be unique.

Note: The instance name cannot contain any of the following characters: **[ ] < > , ; : + = " / \ | ? * # '**

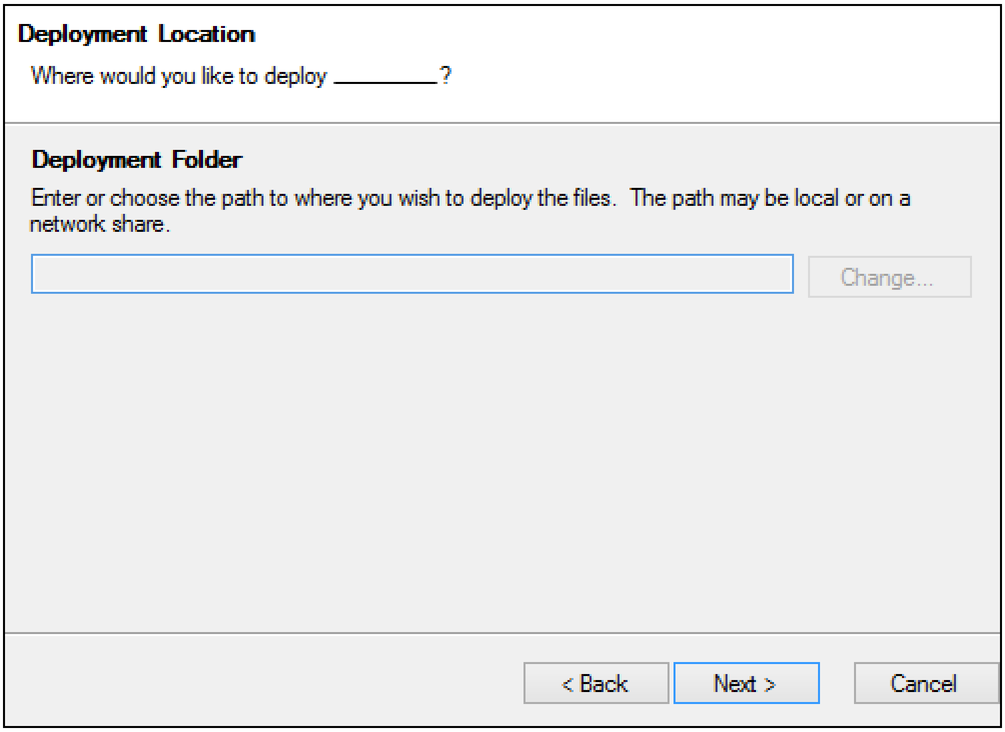
c. Click **OK**.

7. The **Deployment Version Number** fields can be used to manually set a new version number for this deployment. This number is used by client machines to determine if the application installed needs to be updated.

   The **Deployment Version Number** is incremented automatically by the deployment wizard. The initial Deployment Version Number is **1.0.0.0**, and there is no need to change this number.

Note: The **Deployment Version Number** is not available unless **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. To enable the **Deployment Version Number**, click **Back** and select **Advanced Mode** on the **Welcome to the Deployment Creation Wizard** dialog.

8. Select the **Require clients to upgrade to version** check box to force client machines to upgrade to the current instance. This option is selected by default.
9. Click **Next**. The **Deployment Location** dialog box is displayed.

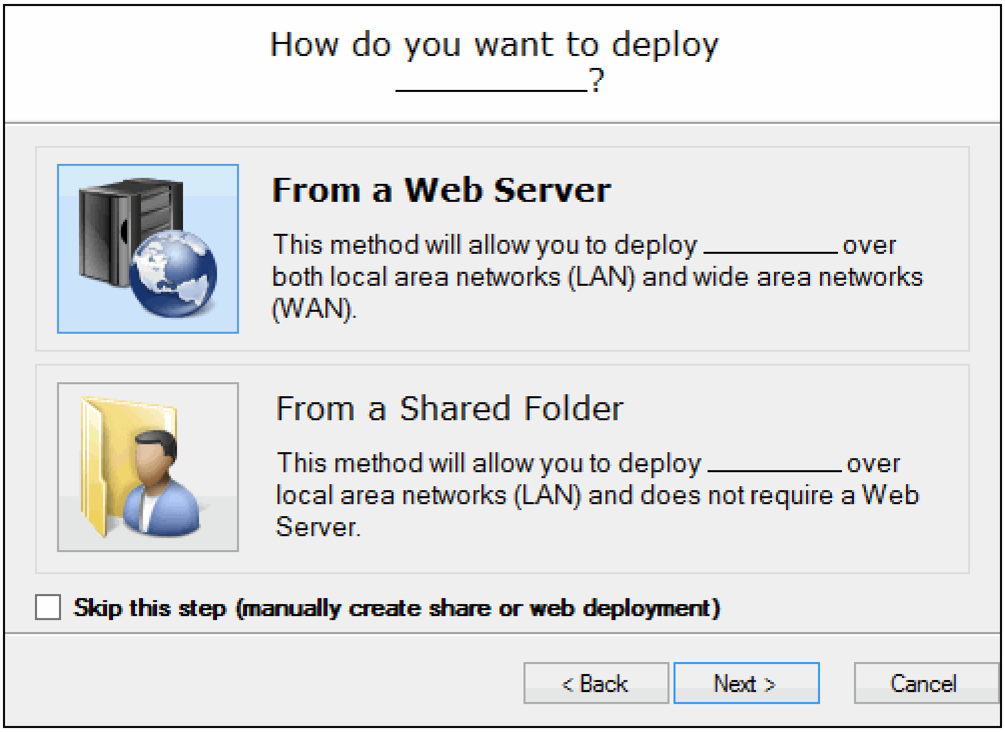


10. Click **Change** beside the **Deployment Folder** field to select a different folder. The **Deployment Folder** can be a local path or network location and is the folder to which the application files are copied on the deployment server.

Note: If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines with the new Deployment Folder location.

Caution: Files in the **Deployment Folder** selected are overwritten.

11. Click **Next**. The **How do you want to deploy...?** dialog is displayed.



12. Click the **Web Server** icon to deploy the application to client workstations via a URL (e.g., **https://web-server/Application/DeployedApp.application**).

Note: If IIS is not installed, you cannot select **Web Server** and must deploy the application via a UNC path.

Click the **From a Shared Folder** icon to deploy the application to client workstations via a UNC path (e.g., **\\machine-name\Application\DeployedApp.application**).

Note: The **From a Shared Folder** option is not available if deploying to a network location (e.g., \\MyServer\MyShare).

Select **Skip this step** to configure the deployment folder manually as a shared folder or a virtual directory.

13. Click **Next**.
    - For **Web Server** installations, go to the Web Server Installation Steps.
    - For **From a Shared Folder** installations, go to the From a Shared Folder Installation Steps.
    - If **Skip this step** is selected, go to the Manually Created Share Steps.

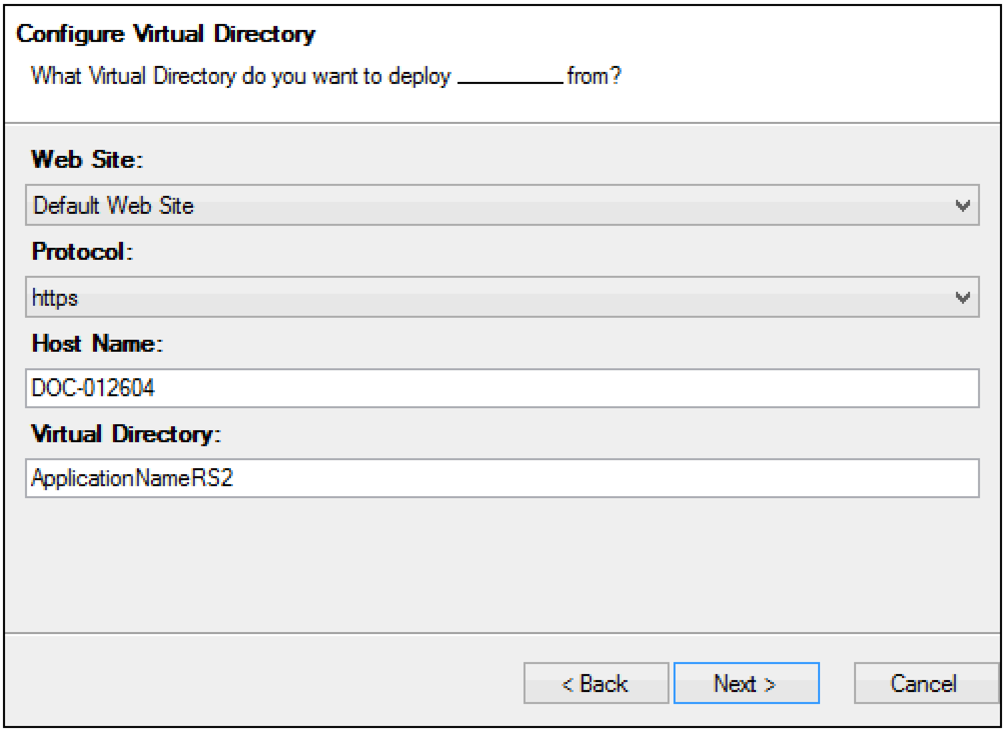
Web Server Installation Steps

If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

After selecting **Web Server** at the **How do you want to deploy...?** dialog box, the **Configure Virtual Directory** dialog is displayed:



1. Select the **Web Site** to create the virtual directory under from the drop-down list.

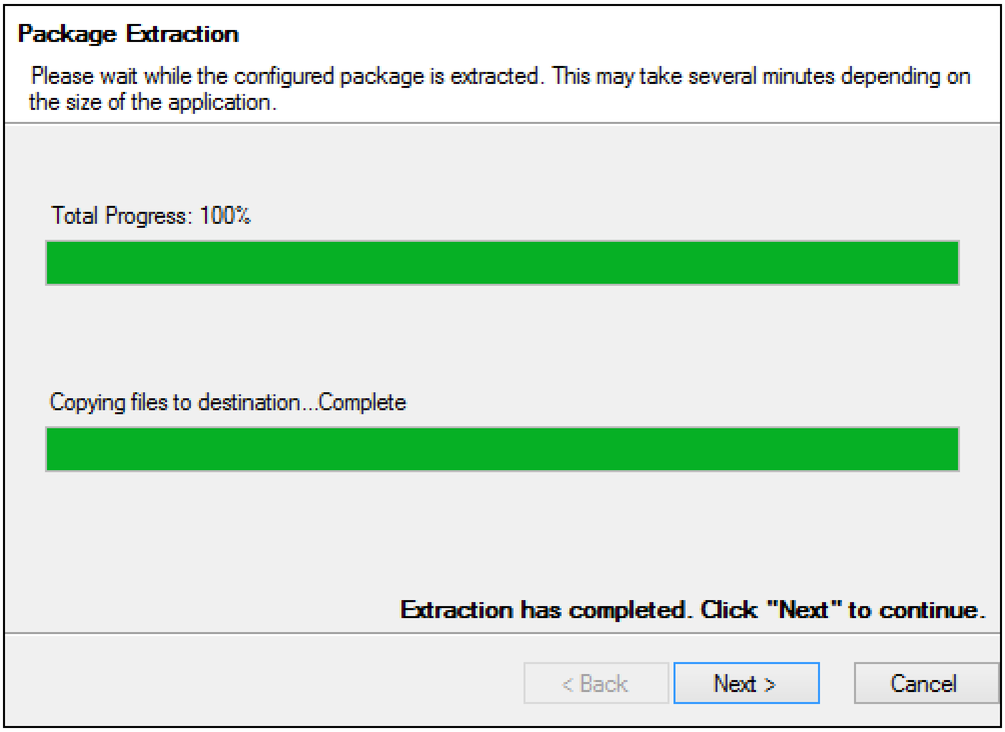
Note: The application generated by the deployment wizard uses the security settings from the Default Web Site in IIS.

2. Select a **Protocol** from the drop-down list. This allows you to configure the installed application to use the **https** protocol if an HTTPS binding is available.
3. Enter the **Host Name** of the **Web Site** selected, or accept the default host name presented. In some cases, such as with an HTTPS binding, the default value may need to be changed to match the host name in the certificate.

   To specify a port to use for this connection, include the port number in the host name: **<host name>:<port>** (e.g., **DEV-007832:82**).
4. Enter a name for the **Virtual Directory** in the field provided. This is the name of the virtual directory created under the Web server selected.

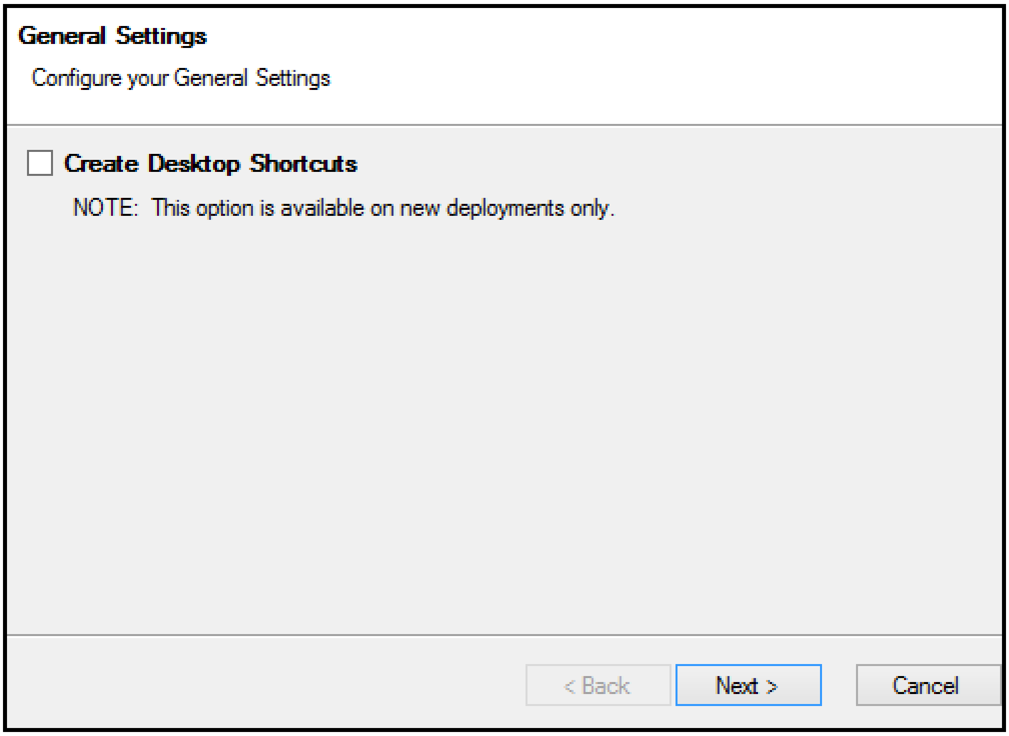
Note: If a virtual directory with the same name already exists, the existing virtual directory is configured to point to the **Deployment Folder** configured. The following special characters cannot be used in the Virtual Directory name: **\ ? ; : @ & = + $, | " < > ***.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

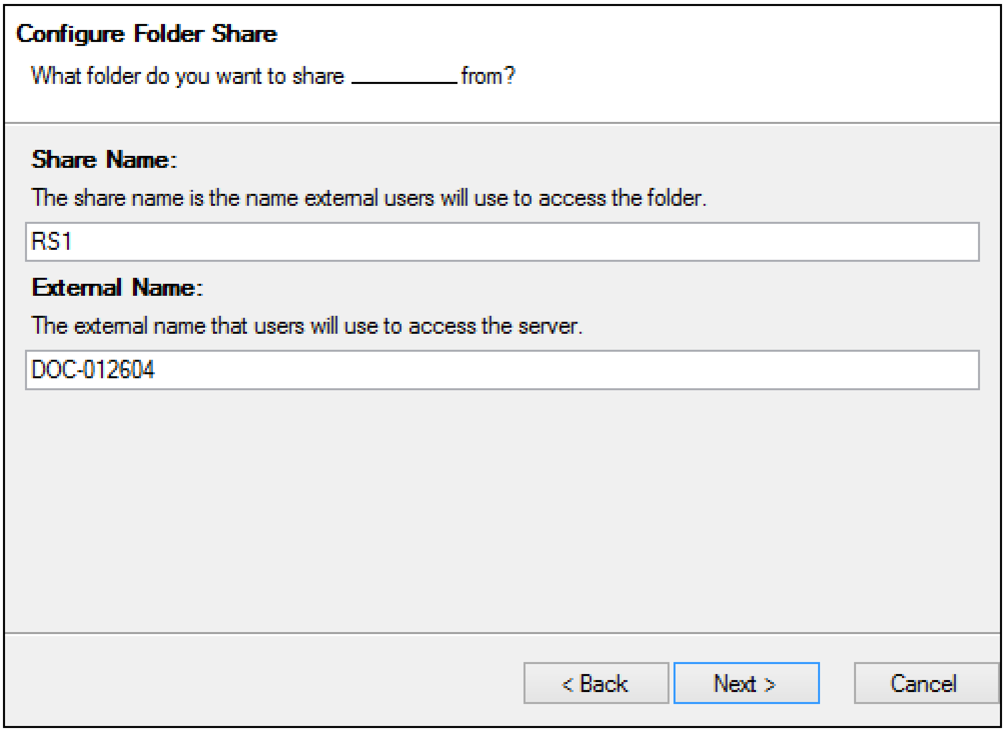
Note: This option is only available for new deployments.

7. Click **Next**.

Note: You do not need to complete the steps under **From a Shared Folder Installation Steps** or **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

From a Shared Folder Installation Steps

If you selected **From a Shared Folder** at the **How do you want to deploy...?** dialog, the **Configure Folder Share** dialog is displayed:



Note: Read access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation for deployments installed to a UNC location.

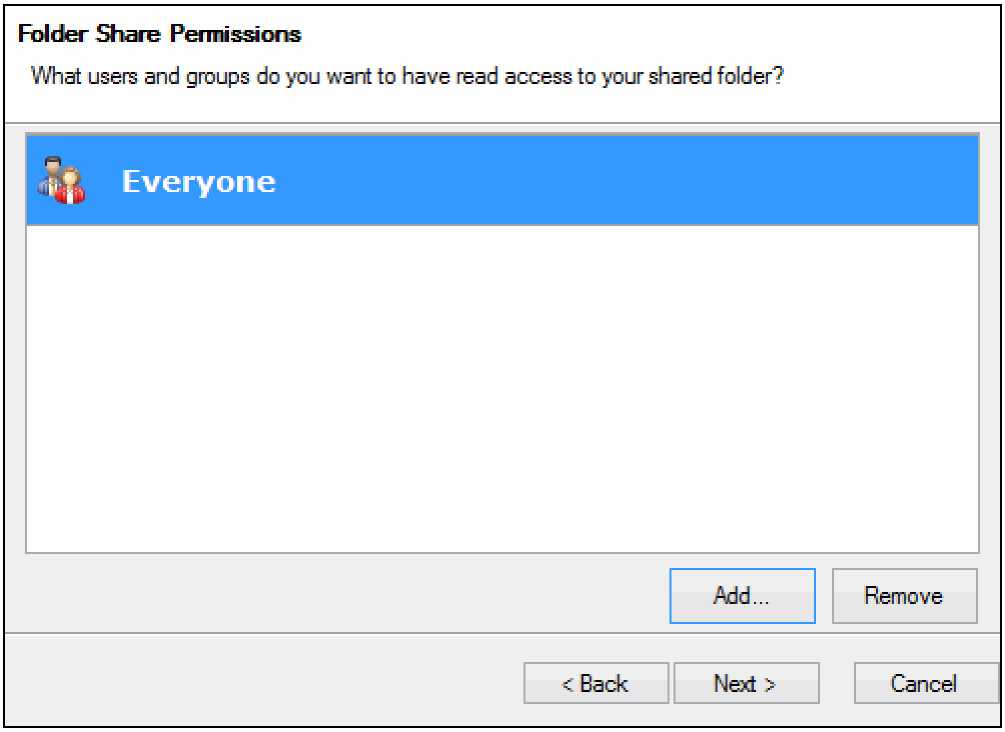
1. Enter a **Share Name** in the field provided. This is the name that the **Deployment Folder** will be shared as to users.

Note: The **Share Name** must be unique. You cannot enter the name of an existing share.

2. Enter the **External Name** of the server hosting the **Deployment Folder** configured, or accept the default value presented. This is the name users will use to access the server. The default value is the machine name of the machine containing the shared folder.

Note: The **External Name** field is only available if **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog.

3. Click **Next**. The **Folder Share Permissions** dialog is displayed if you are installing the deployment to a local drive (e.g., **C:**):

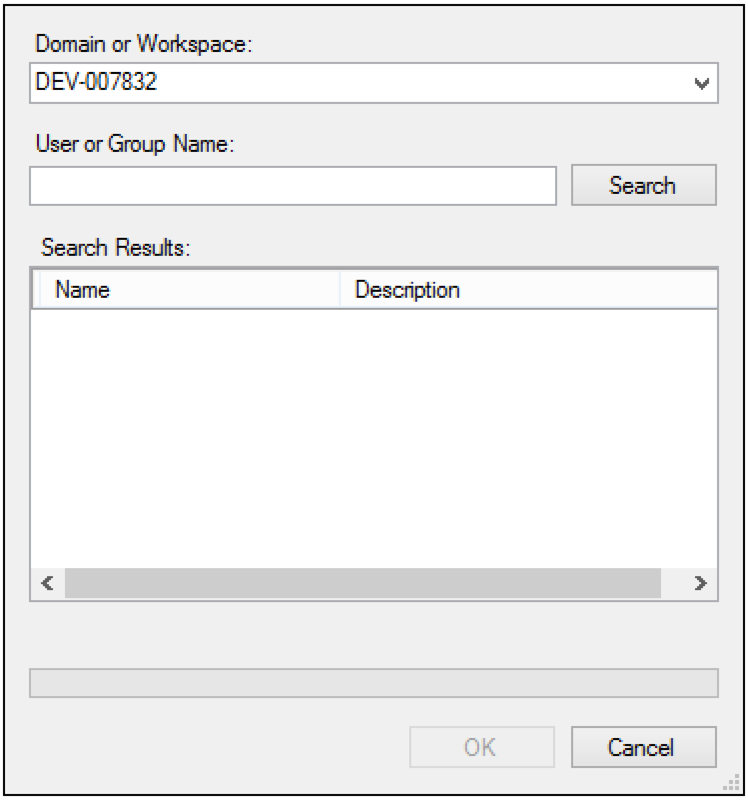


This dialog allows you to add or remove the users and groups that have **read** access to the **Deployment Folder**. By default, the local **Everyone** group is given **read** access.

Note: Read access is required for users to be able to install and upgrade the deployed application.

4. Click **Add** to add additional users or groups, or select a user or group to remove and click **Remove** to remove it. If the users and groups presented are acceptable, proceed to the next step.

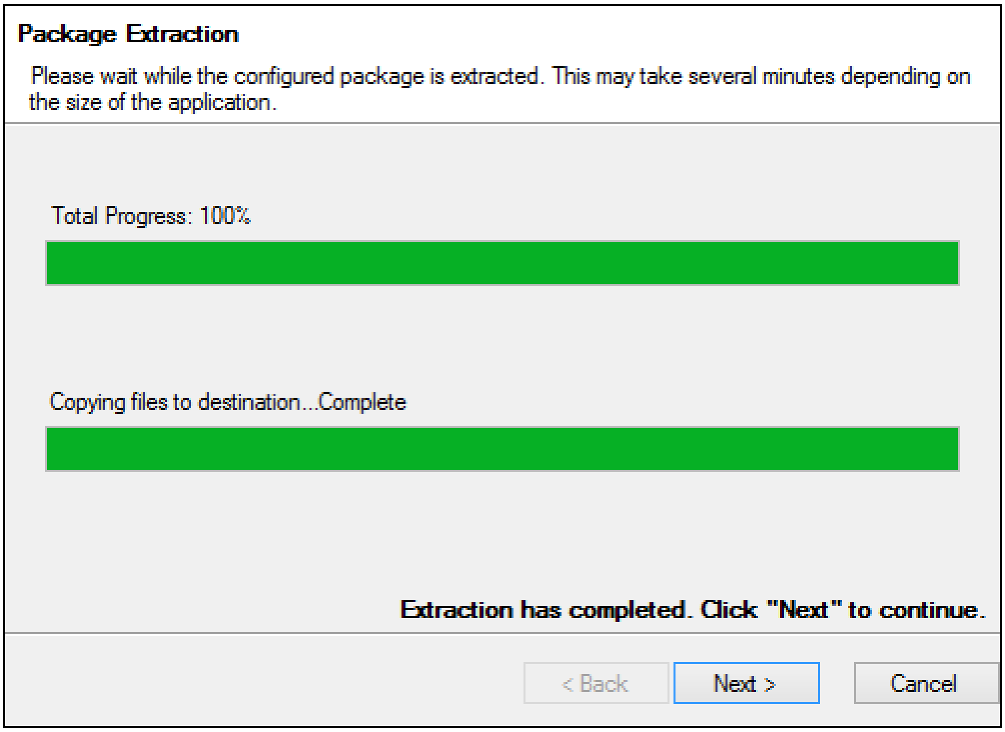
   If you click **Add**, the **Select Users and Groups** dialog is displayed:



   Select the **Domain or Workspace** to find users and groups under from the drop-down list, then enter a **User Group or Name** to search for in the field provided, and click **Search**. Leave the **User or Group Name** field empty to locate all available accounts.

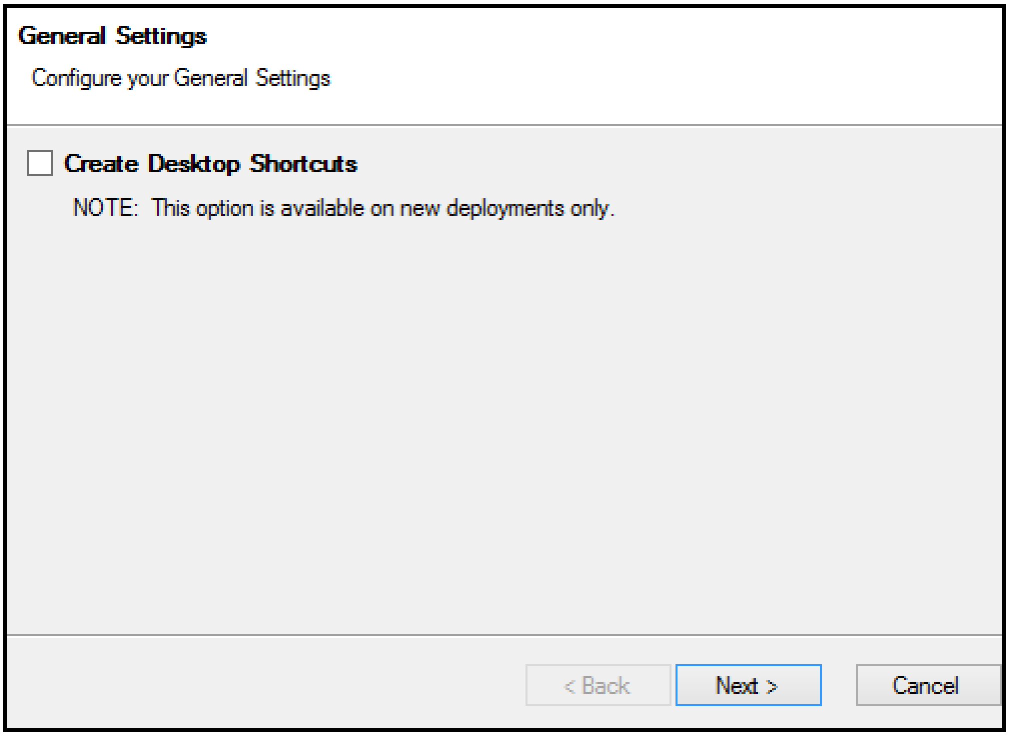
   Select the user or group to add from the **Search Results**, then click **OK**. Repeat as necessary to configure your **Folder Share Permissions**.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

Note: This option is only available for new deployments.

7. Click **Next**.

Note: You do not need to complete the steps under **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

Manually Created Share Steps

If you selected **Skip this step** at the **How do you want to deploy...?** dialog, you must manually create the share that the deployment will be installed to.

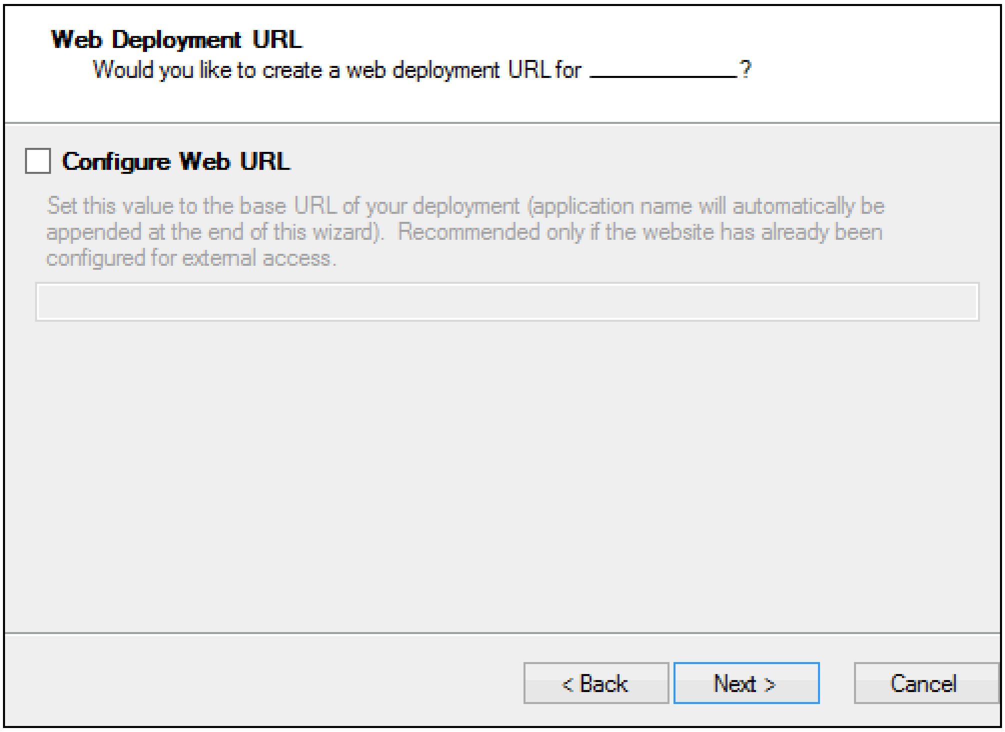
If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

If you are installing the deployment package to a network share, **Read** access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation.

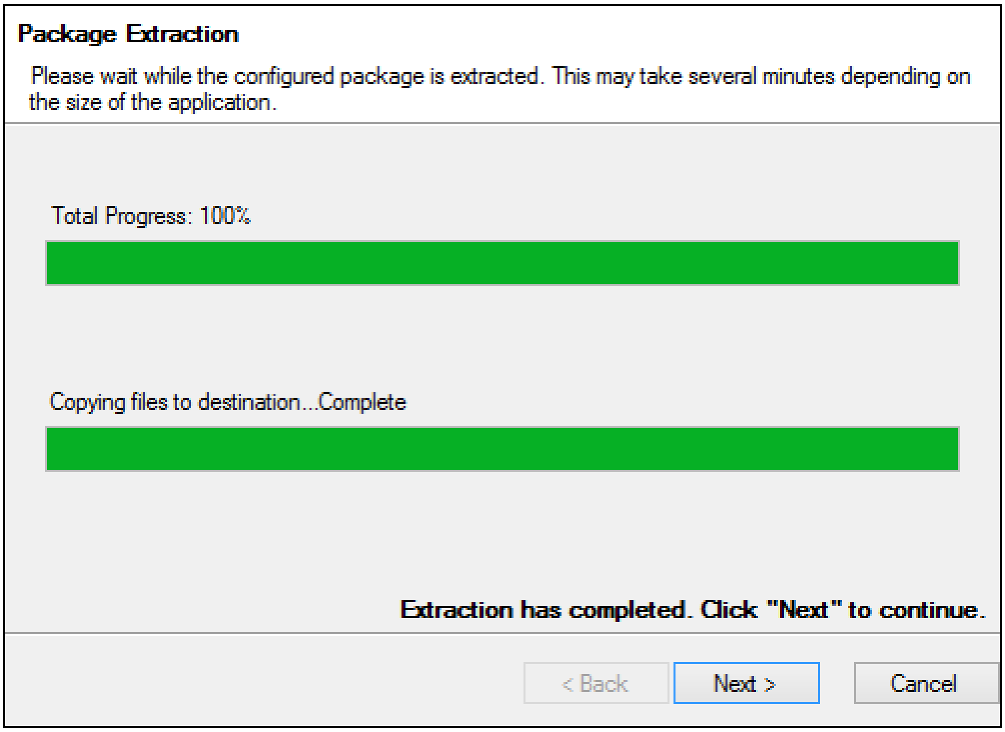
If you selected **Skip this step** at the **How do you want to deploy...?** dialog, the **Web Deployment URL** dialog is displayed:



1. Select **Configure Web URL** to have the installer create the link to the deployment that will be sent out to client machines for client installations of the deployed application. This link is available to be copied at the end of the installation, if one is configured.

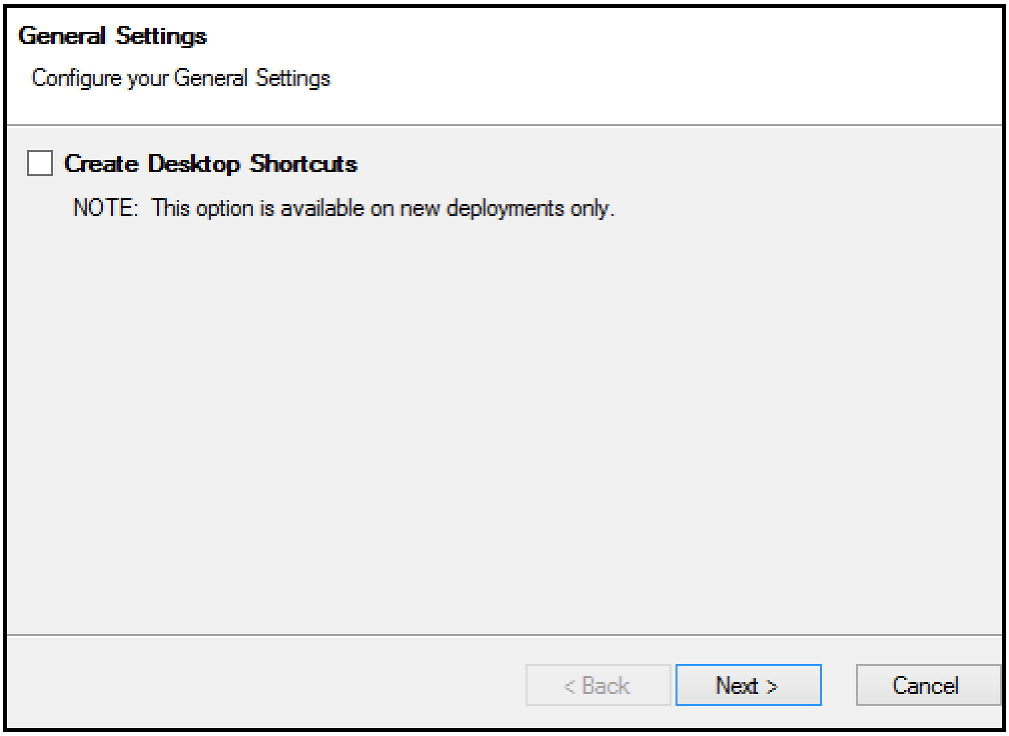
Tip: Do not select this option if the deployment Web site has not been configured for external access.

2. In the field, enter the base URL of your deployment without the application name (for example, **https://web-server/virtual-directory**). The application name is automatically appended to the URL at the end of the installation.
3. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



4. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



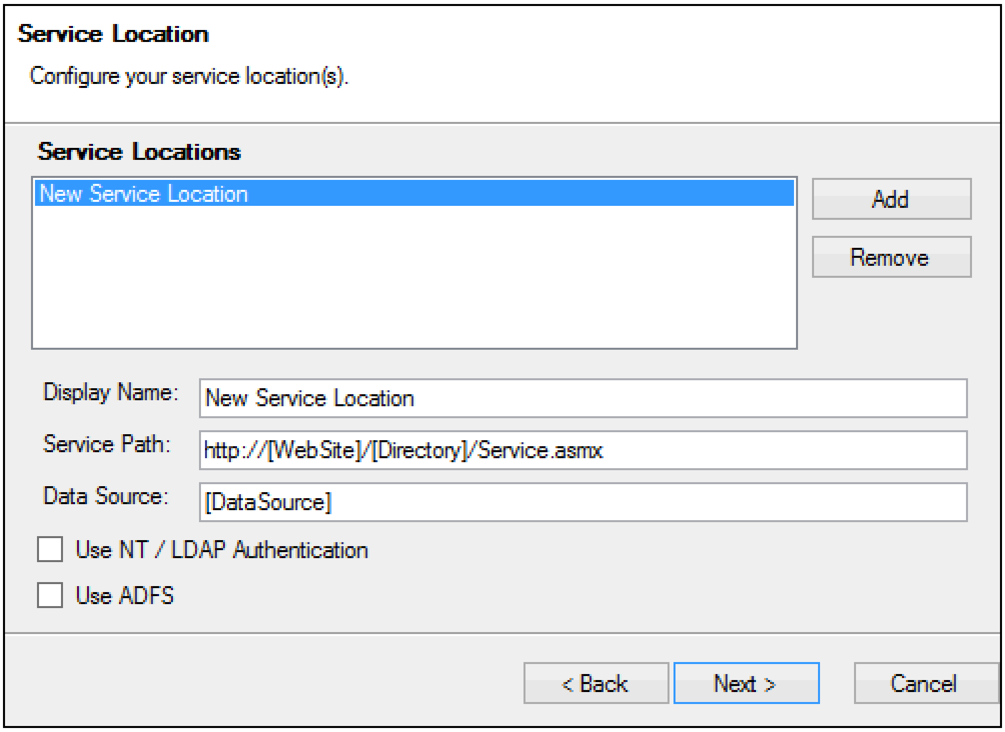
Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

Note: This option is only available for new deployments.

5. Click **Next**.

Service Location and Deployment Configuration

After clicking **Next**, the **Service Location** dialog is displayed.



1. Click **Add**.
2. Enter in the **Display Name** field the name of the service location.
3. Enter in the **Service Path** field the full URL to the OnBase application or Web server service (for example, **https://machinename/AppServer/Service.asmx** or **https://machinename/AppNet/Service.asmx**).

Note: URLs that use the HTTPS binding must be correctly configured on the server for secure connections.

4. In the **Data Source** field, enter the data source name for the appropriate data source.
5. Select **Use NT / LDAP Authentication** if your system uses Active Directory or LDAP Authentication.

Note: In order to use Active Directory or LDAP authentication, the database against which Agenda runs must also be configured for Active Directory or LDAP authentication. The installer configures Agenda to match the authentication scheme of the database.

6. Select **Use ADFS** if your system uses AD FS (Active Directory Federation Services) authentication.

Note: Use ADFS is not the same Active Directory authentication scheme as **Use NT/LDAP Authentication**. The **Use ADFS** option is not available for all modules. If this option is not displayed, the module you are installing either does not support AD FS or must be manually configured for AD FS authentication. You cannot enable both **Use ADFS** and **Use NT/LDAP Authentication**. For more information about configuring OnBase to use AD FS, see the **Legacy Authentication Methods** module reference guide.

Selecting **Use ADFS** causes the remainder of the deployment to be run in Advanced Mode, even if Advanced Mode was not selected initially, because the configuration file for the module must be updated before signing and finalizing the deployment.

Note: Depending on the module being updated or added, you may be required to complete information in additional dialogs specific to the module. See the main installation steps above for information on any additional dialogs or steps that must be completed before signing the deployment.

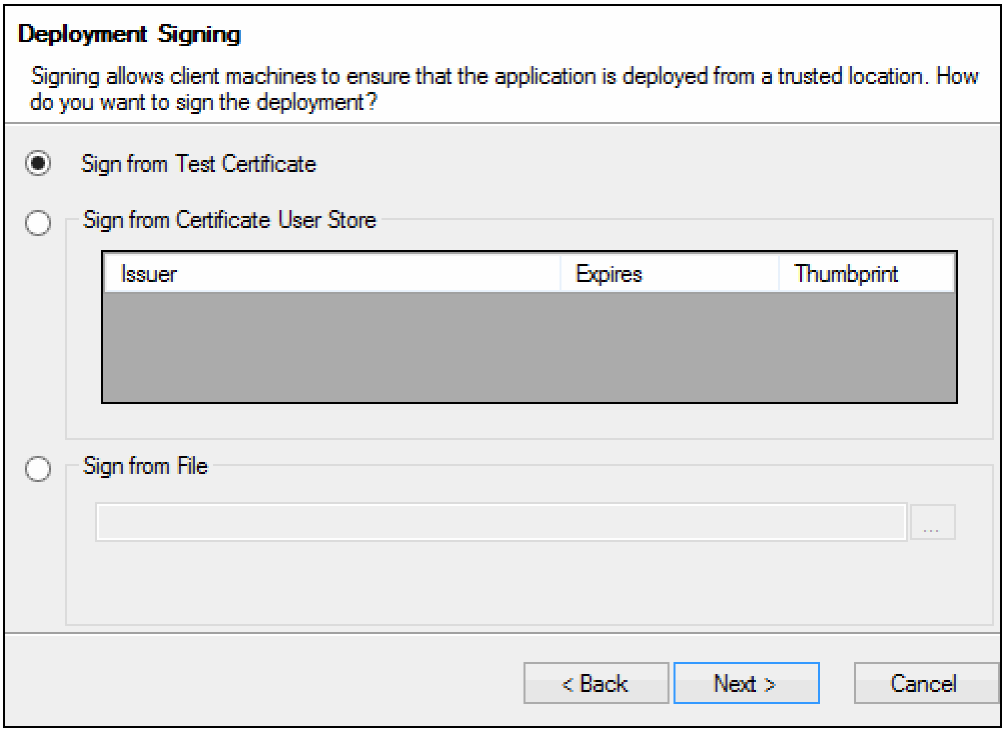
Deployment Signing

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box.

If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

If you are not in advanced mode, you must access the files directly by navigating to the deployment location before signing the deployment.

The **Deployment Signing** dialog box is displayed.



1. Select the appropriate signing method.

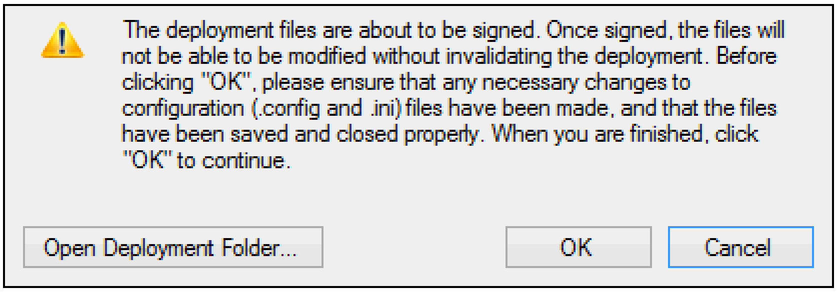
   When **Sign from Test Certificate** is selected, a test certificate with the Common Name **localhost** is used. This test certificate is packaged with all ClickOnce installers. For security purposes, it is strongly recommended that this certificate remain un-trusted. This does not mean the certificate cannot be used, simply that when users attempt to launch the ClickOnce link, they are prompted with a message stating that the publisher could not be verified.

   When **Sign from Certificate User Store** is selected, certificates from the current user store are listed under this option. If there are any certificates in the current user store, they can be used for signing here. Only certificates purposed for code signing are valid.

   When **Sign from File** is selected, the deployment is signed using the PFX file entered in the corresponding field. Only certificates purposed for code signing are valid.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are not in advanced mode, you must access the files directly by navigating to the deployment location before clicking **Next** and signing the deployment.

2. Click **Next**. If you are in **Advanced Mode**, the **File Edit Notification** dialog box is displayed.



   From this dialog box you can open the deployment folder by clicking **Open Deployment Folder**. At this time, any necessary changes to the files in the folder or the contents of the folder must be made, such as custom changes to the *.config file for the module.
3. Click **OK**. Upon clicking **OK**, the folder is signed and cannot be modified without updating the deployment instance.
4. If you signed the deployment from a file, and the certificate requires a password, you will be prompted to enter the password for the certificate.

Tip: You can paste the password into the field to ensure accuracy.

5. The application is deployed and the **Summary** dialog is displayed upon completion.

   Clicking the link provided under **Success** launches the application. This is the same as the full path that external users must use to install and launch the application.

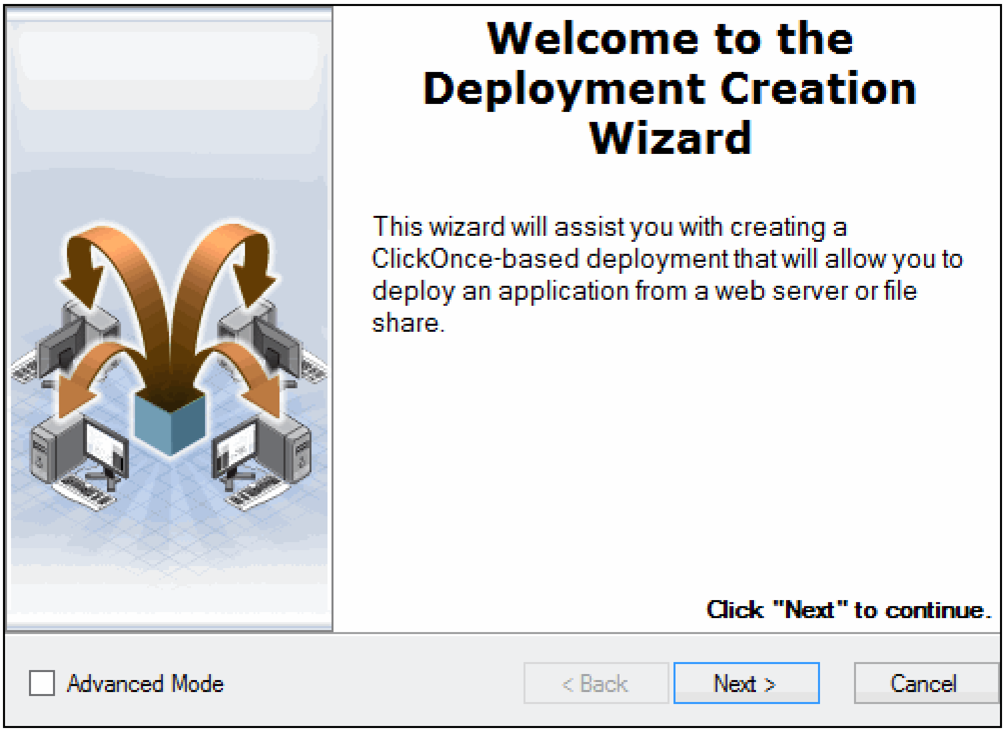
   Click **Copy Link To Clipboard** to copy this link to the clipboard.
6. Click **Finish**.

Upon completing these steps, you have installed the Deployment Wizard and installed an instance. You can add additional instances and access the Deployment Wizard by selecting **Start | All Programs | Hyland | Deployment | Deployment Wizard**. You can also update existing instances in the same way. See the Updating or Adding a Deployment Instance section for more information.

Updating or Adding a Deployment Instance

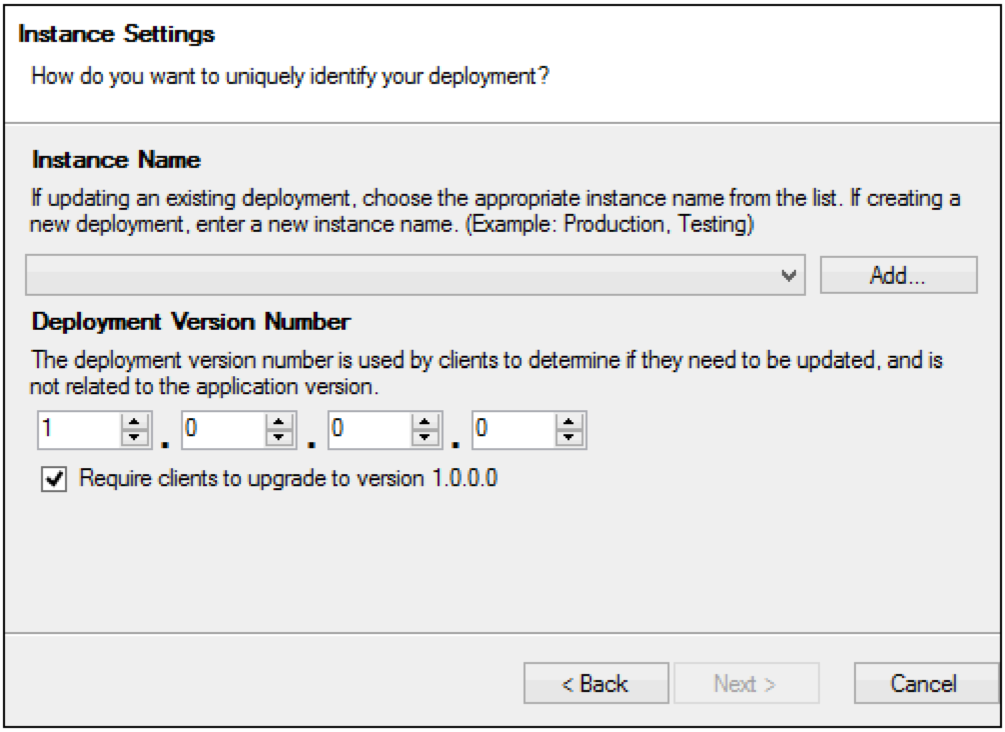
When a change is necessary for a deployment instance, it can be updated or a new instance can be created. To update an existing instance or create a new instance:

1. Select **Start | All Programs | Hyland | Deployment | Deployment Wizard**. The **Welcome to the Deployment Wizard Creation Wizard** dialog is displayed.

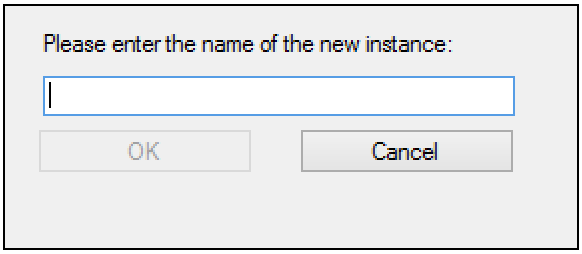


   Select **Advanced Mode** to enable the ability to update certain aspects of the update where the default values are populated by the installer. Not selecting this option automatically uses the default values populated by the installer.
2. Click **Next**. The **Package Selection** dialog is displayed.
3. Select the deployed module for which you are updating the instance.

4. Click **Next**. The **Instance Settings** dialog is displayed.



5. Select the name of the application instance from the drop-down list under the **Instance Name** section. To create a new instance name:
   a. Click the **Add** button to the right of the drop-down list. The **Create New Instance** dialog box is displayed.



Note: If you create a new instance name for an existing deployment, the package must be redeployed to client machines under the new instance name.

   b. Enter a name for the new instance in the field provided. The name entered is used to distinguish this deployment from other deployments, so it must be unique.

Note: The instance name cannot contain any of the following characters: **[ ] < > , ; : + = " / \ | ? * # '**

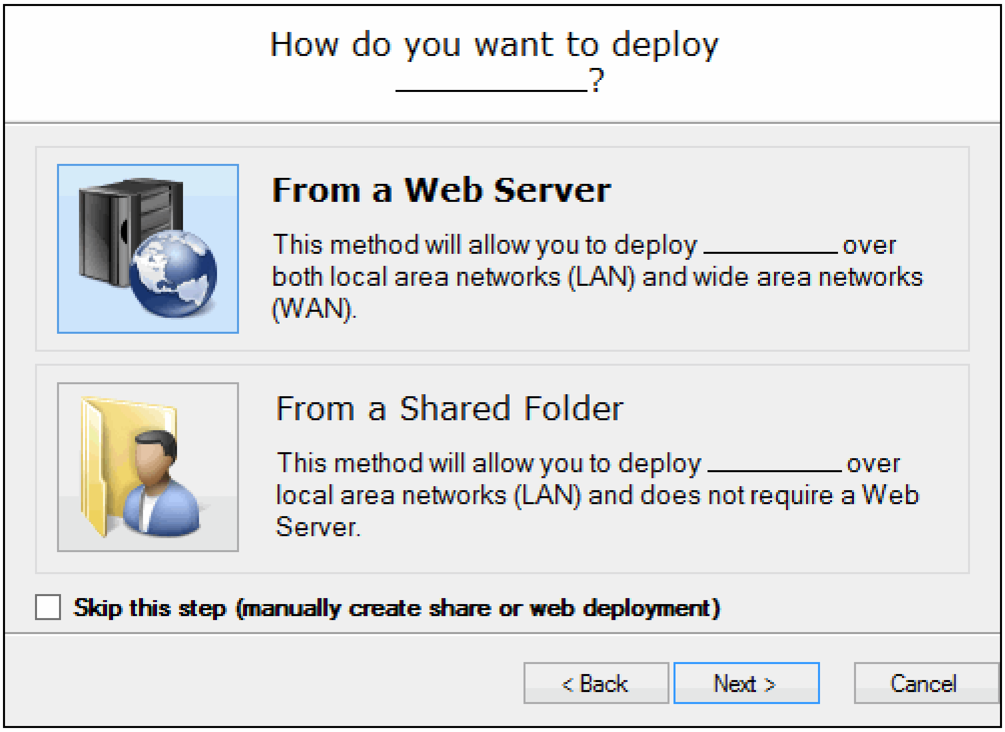
   c. Click **OK**.

6. The **Deployment Version Number** fields can be used to manually set a new version number for this deployment. This number is used by client machines to determine if the application installed needs to be updated.

   The **Deployment Version Number** is incremented automatically by the deployment wizard. There is no need to change this number.

Note: The **Deployment Version Number** is not available unless **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. To enable the **Deployment Version Number**, click **Back** and select **Advanced Mode** on the **Welcome to the Deployment Creation Wizard** dialog.

7. Select the **Require clients to upgrade to version** check box to force client machines to upgrade to the current instance. This option is selected by default.
8. Click **Next**. The **How do you want to deploy Agenda?** dialog is displayed.



9. Click the **Web Server** icon to deploy the application to client workstations via a URL (e.g., **https://web-server/Application/DeployedApp.application**).

   Click the **From a Shared Folder** icon to deploy the application to client workstations via a UNC path (e.g., **\\machine-name\Application\DeployedApp.application**).

Note: If you are upgrading an existing instance, you can only select to deploy it in the same method as it was deployed originally. For new instances, if IIS is not installed, you cannot select **Web Server** and must deploy the application via a UNC path.

10. Click **Next**.

    For **Web Server** installations, go to the Web Server Add or Update Steps.

    For **From a Shared Folder** installations, go to the From a Shared Folder Installation Steps.

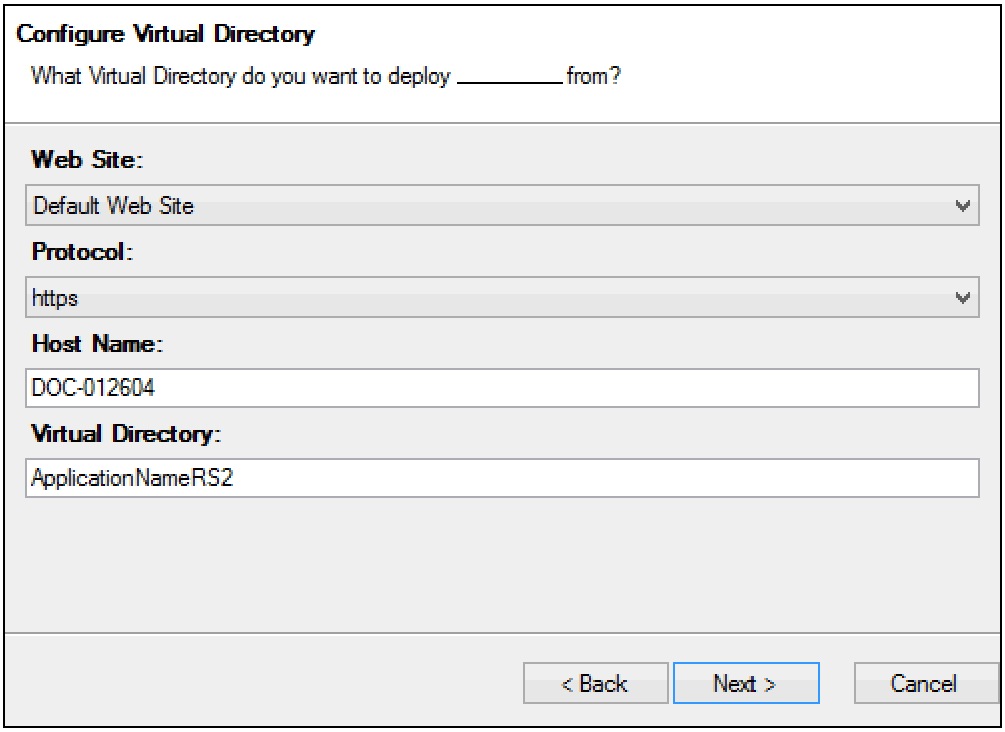
Web Server Add or Update Steps

If you are adding a deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

If you are adding or updating a **Web Server** deployment, the **Configure Virtual Directory** dialog is displayed:



1. The default **Deployment Folder** path is displayed. Click **Change** to select a different folder.

Note: If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines under the new Deployment Folder location.

The **Deployment Folder** is the folder to which the application files are copied. This folder is configured as a virtual directory, to be mounted by the selected web server.

Caution: Files in the **Deployment Folder** selected are overwritten.

2. Select the **Web Site** to create the virtual directory under from the drop-down list.

Note: If you are updating an existing instance, you cannot change the **Web Site**.

3. Enter a name for the **Virtual Directory** in the field provided. This is the name of the virtual directory created under the web server selected.

Note: If a virtual directory with the same name already exists, the existing virtual directory is configured to point to the **Deployment Folder** selected. If you are updating an existing instance, you cannot change the **Virtual Directory**.

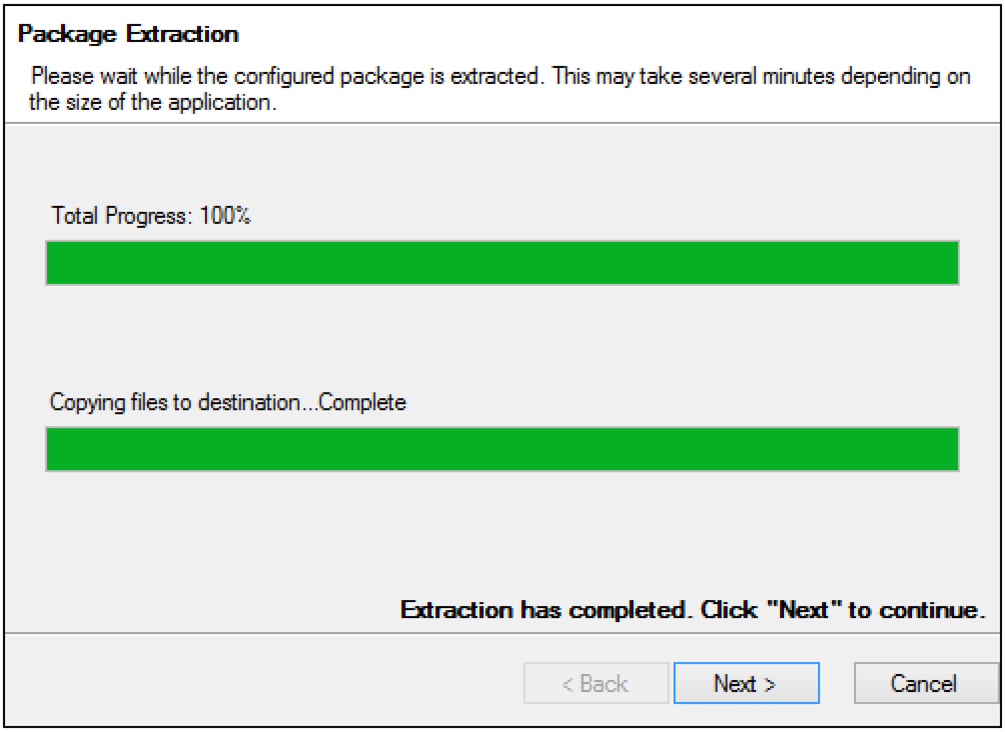
4. Select a **Protocol** from the drop-down list. This allows you to configure the installed application to use the **https** protocol if an HTTPS binding is available.

Note: If you are updating an existing instance, you cannot change the **Protocol**.

5. Enter the **Host Name** of the **Web Site** selected, or accept the default host name presented. In some cases, such as with HTTPS bindings, the default value may need to be changed to match the host name in the certificate.

Note: If you are updating an existing instance, you cannot change the **Host Name**.

6. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



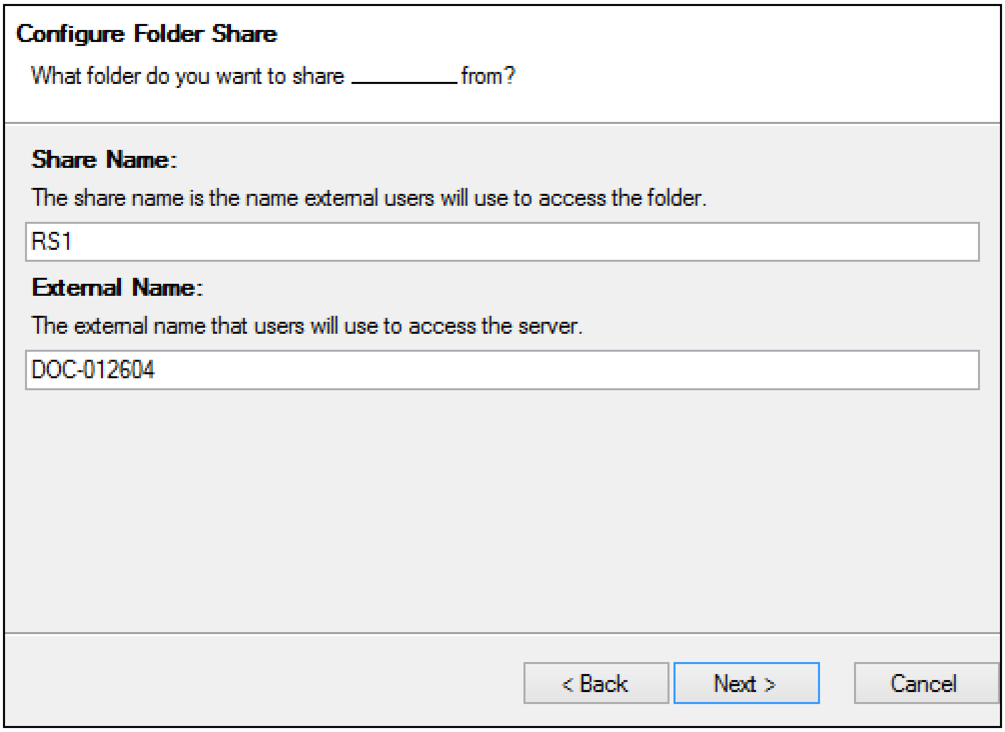
7. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed, but the **Create Desktop Shortcuts** option is only available for new deployments.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

8. Click **Next**. Go to the Service Location and Deployment Configuration steps to complete the installation.

From a Shared Folder Add or Update Steps

If you are adding or updating a **From a Shared Folder** deployment, the **Configure Folder Share** dialog is displayed:



1. The default **Deployment Folder** path is displayed. The **Deployment Folder** is the folder to which the application files are copied. Click **Change** to select a different folder.

Note: If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines under the new Deployment Folder location.

Caution: Files in the **Deployment Folder** selected are overwritten.

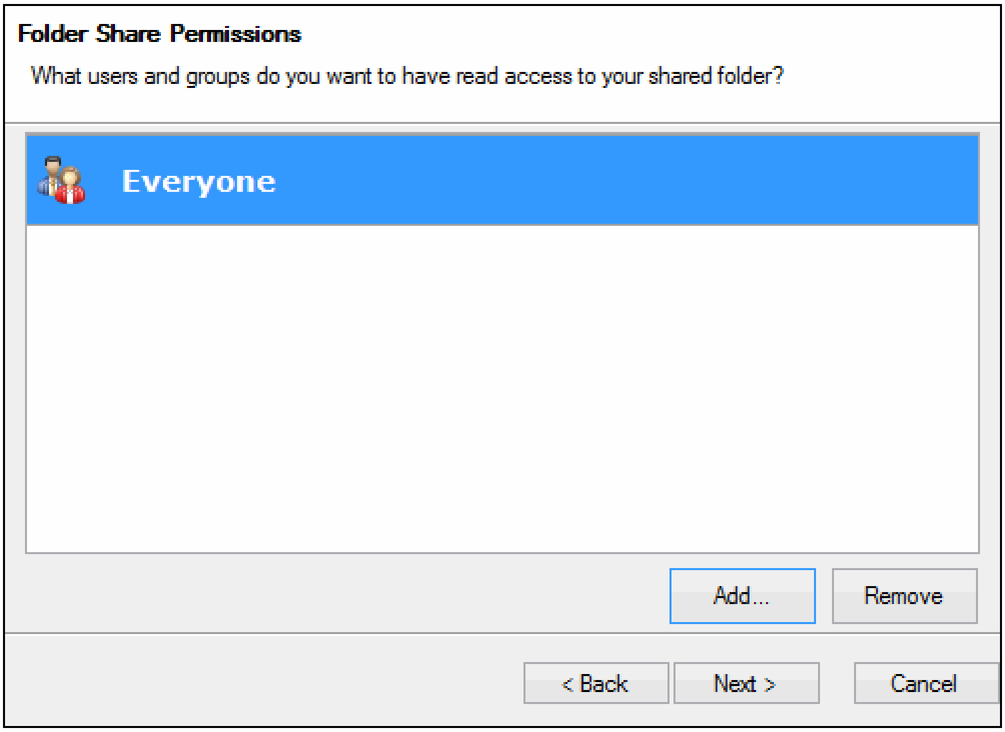
2. Enter a **Share Name** in the field provided. This is the name that the **Deployment Folder** will be shared as to users.

Note: The **Share Name** must be unique. You cannot enter the name of an existing share. If you are updating an existing instance, you cannot change the **Share Name**.

3. Enter the **External Name** of the server hosting the **Deployment Folder** selected, or accept the default value presented. This is the name users will use to access the server. The default value is the machine name of the machine containing the shared folder.

Note: The **External Name** field is only available if **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. If you are updating an existing instance, you cannot change the **External Name**.

4. Click **Next**. The **Folder Share Permissions** dialog is displayed:

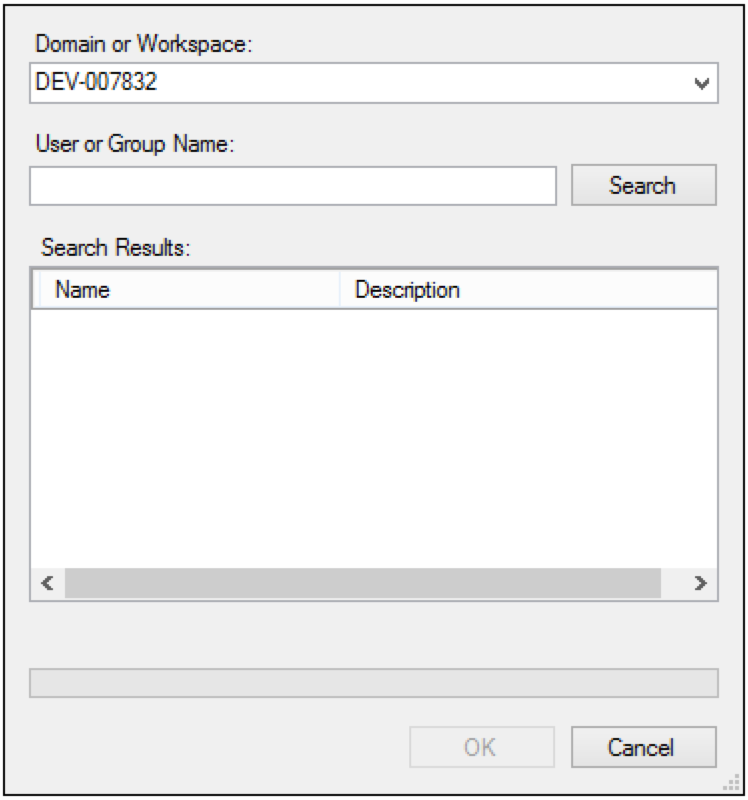


This dialog allows you to add or remove the users and groups that have **read** access to the **Deployment Folder**. By default, the local **Everyone** group is given **read** access.

Note: Read access is required for users to be able to install and upgrade the deployed application.

5. Click **Add** to add additional users or groups, or select a user or group to remove and click **Remove** to remove it. If the users and groups presented are acceptable, proceed to the next step.

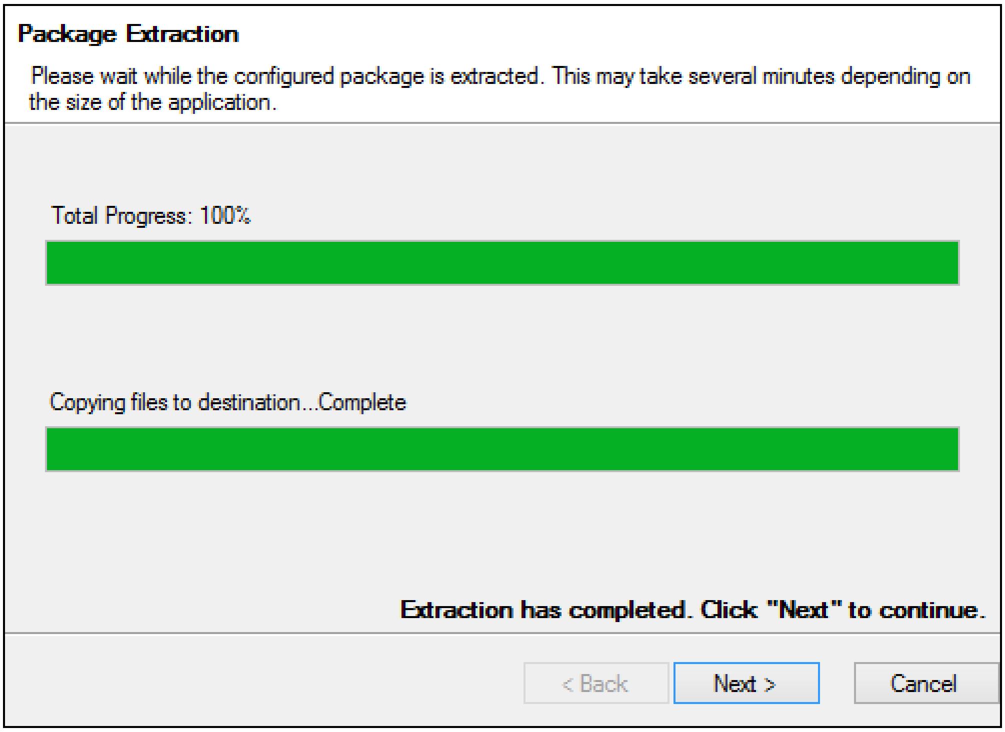
   If you click **Add**, the **Select Users and Groups** dialog is displayed:



   Select the **Domain or Workspace** to find users and groups under from the drop-down list, then enter a **User Group or Name** to search for in the field provided, and click **Search**. Leave the **User or Group Name** field empty to locate all available accounts.

   Select the user or group to add from the **Search Results**, then click **OK**. Repeat as necessary to configure your **Folder Share Permissions**.

6. Click **Next** after configuring your **Folder Share Permissions**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



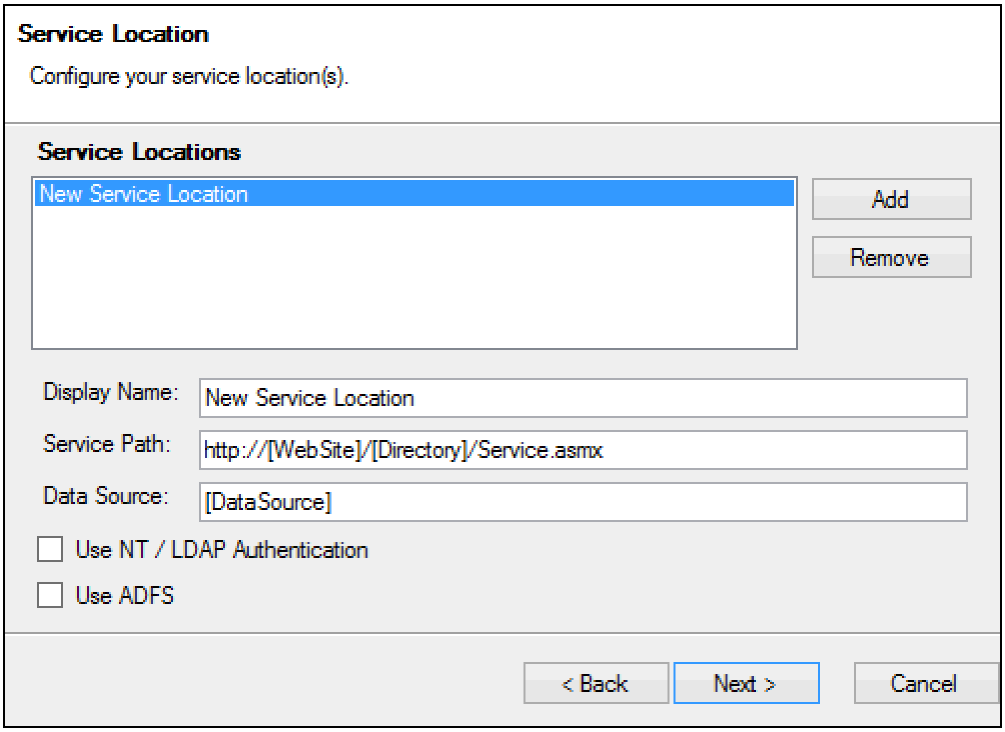
7. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed, but the **Create Desktop Shortcuts** option is only available for new deployments.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

8. Click **Next**. Go to the Service Location and Deployment Configuration steps to complete the installation.

Service Location and Deployment Configuration

After clicking **Next** on the **Package Extraction** or **General Settings** dialogs, the **Service Location** dialog is displayed.



1. Select an existing **Service Location** or click **Add** to create a new service location.
2. Update or enter in the **Display Name** field the name of the service location for the instance.
3. Update or enter in the **Service Path** field the full URL to the OnBase application server service. For example, **https://machinename/AppServer/Service.asmx**.
4. Update or enter in the **Data Source** field the data source name for the appropriate data source.
5. Select **Use NT / LDAP Authentication** if your system uses Active Directory or LDAP Authentication.

Note: In order to use Active Directory or LDAP authentication, the database against which Agenda runs must also be configured for Active Directory or LDAP authentication. The installer configures Agenda to match the authentication scheme of the database.

6. Select **Use ADFS** if your system uses AD FS (Active Directory Federation Services) authentication.

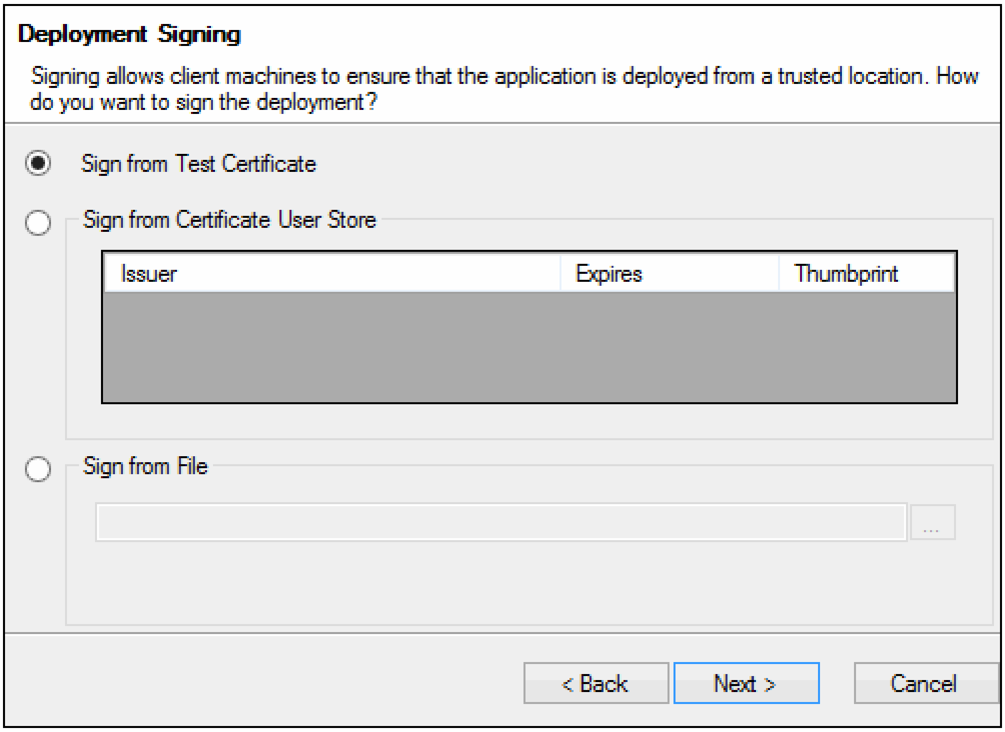
   Selecting **Use ADFS** causes the remainder of the deployment to be run in Advanced Mode, even if Advanced Mode was not selected initially, because the configuration file for the module must be updated before signing and finalizing the deployment.

Note: Use ADFS is not the same Active Directory authentication scheme as **Use NT/LDAP Authentication**. The **Use ADFS** option is not available for all modules. If this option is not displayed, the module you are installing either does not support AD FS or must be manually configured for AD FS authentication. You cannot enable both **Use ADFS** and **Use NT/LDAP Authentication**. For details on configuring OnBase to use AD FS, see the **Legacy Authentication Methods** module reference guide.

7. Click **Next** to proceed to the **Deployment Signing** dialog box.

Note: Depending on the module being updated or added, you may be required to complete information in additional dialogs specific to the module. See the main installation steps above for information on any additional dialogs or steps that must be completed before signing the deployment.

8. At the **Deployment Signing** dialog, select the appropriate signing method.



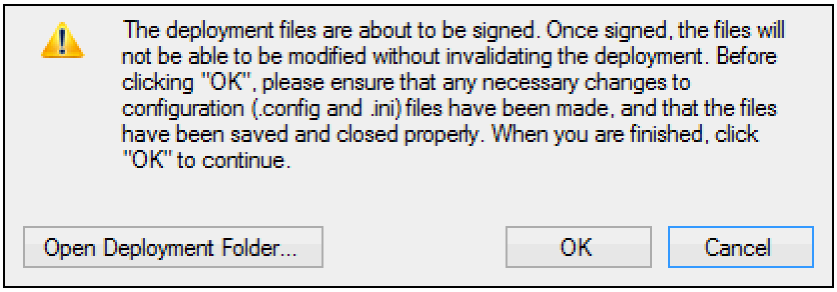
When **Sign from Test Certificate** is selected, a test certificate with the Common Name **localhost** is used. This test certificate is packaged with all ClickOnce installers. For security purposes, it is strongly recommended that this certificate remain un-trusted. This does not mean the certificate cannot be used, simply that when users attempt to launch the ClickOnce link, they are prompted with a message stating that the publisher could not be verified.

When **Sign from Certificate User Store** is selected, certificates from the current user store are listed under this option. If there are any certificates in the current user store, they can be used for signing here. Only certificates purposed for code signing are valid.

When **Sign from File** is selected, the deployment is signed using the PFX file entered in the corresponding field. Only certificates purposed for code signing are valid.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are not in advanced mode, you must access the files directly by navigating to the deployment location before clicking **Next** and signing the deployment.

9. Click **Next**. If you are in Advanced Mode, the **File Edit Notification** dialog box is displayed.



   From this dialog box you can open the deployment folder by clicking **Open Deployment Folder**. At this time, any necessary changes to the files in the folder or the contents of the folder should be made. Upon clicking **OK**, the folder is signed and cannot be modified without updating the deployment instance. Clicking **Cancel** returns you to the signing screen.

10. Click **OK**. The application is deployed and the **Summary** dialog is displayed upon completion.

    Clicking the link provided under **Success** launches the application. This is the same as the full path that external users must use to install and launch the application.

    Click **Copy Link To Clipboard** to copy this link to the clipboard.

11. Click **Finish**.

Automatically Launching a Deployed Application at System Startup

In order to launch a deployed application automatically at startup you must add a shortcut to the deployed application to the Windows startup folder for each user. The Windows startup folder is usually located at **C:\Documents and Settings\<user>\Start Menu\Programs\Startup** on the user's machine.

The shortcut created must point to the ***.application** file in the deployed location (e.g., **\\deployment-server\ApplicationDirectory\ApplicationNameInstance.application** or **https://deployment-server/ApplicationDirectory/ApplicationNameInstance.application**).

When a user first starts their computer after adding this shortcut, the application is automatically installed and launched as part of the startup routines. Subsequent startups will only launch the application, unless the application has been redeployed and users are forced to upgrade as part of the redeployment. In that case, the application is upgraded first before being launched.

Note: The shortcut must access the application in the same way as the application was originally installed (i.e., via a UNC or URL path to the deployment server). In other words, if the application was originally installed by accessing a URL, the shortcut must also point to the URL. If the application has already been installed on the user's machine, it may need to be uninstalled via the Windows Control Panel (using **Add or Remove Programs**) before the new shortcut will work.

Removing a Deployed Application

Deployed applications are installed to both client workstations and the deployment server. This section describes how to remove a deployed application instance from both the client workstations and deployment server, or completely removing the deployed application and all installed instances.

Removing a Deployed Application Instance from Client Workstations

To remove a deployed application instance from a client workstation:

1. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
2. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
3. Locate the installed application in the list of programs (e.g., **Hyland Agenda [Instance Name]**).
4. Select the program and click **Change/Remove**. The deployed application **Maintenance** dialog is displayed.
5. Select **Remove the application from this computer**.
6. Click **OK**.

The installed application is removed from the workstation.

Note: Removing the application instance from client workstations does not remove the application instance from the deployment server. Users can re-install a removed application instance by following the original link to the instance. To completely remove a deployed application instance, see Removing a Deployed Application Instance from the Deployment Server or Completely Removing a Deployed Application below.

Removing a Deployed Application Instance from the Deployment Server

If a deployed application instance is removed from all client workstations, it can be re-installed by users who follow the link to the deployed application instance, unless the instance is also removed from the deployment server.

To remove an instance of a deployed application in order to reset the version and/or re-use an instance name:

1. Access the Windows Registry (enter **regedit** in the Windows **Start | Run** dialog). The **Registry Editor** dialog is displayed.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

2. Expand the following registry key:
   HKEY_LOCAL_MACHINE\SOFTWARE\Hyland\Deployment

   Under 64-bit systems this key may be located at:
   HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Hyland\Deployment
3. Expand the subkey that corresponds to the deployed application you want to remove the instance from (for example, **ApplicationEnabler** or **ReportServices**).
4. Right click the subkey that corresponds to the instance name you want to remove.
5. Select **Delete**.
6. Click **Yes** at the confirmation prompt. The deleted instance is no longer available in the Deployment Wizard.
7. Locate the files for the instance to remove on the deployment server.

   The location of the files depends on the location selected during installation. In a default, 32-bit installation, the files are located at **C:\Program Files\Hyland\[ApplicationName]\[InstanceName]** (for example, **C:\Program Files\Hyland\ApplicationEnabler\MyAppEnablerInstance**).

8. Delete all of the files and folders contained in the instance folder, or delete the entire instance folder. The application is no longer available for installation.

Caution: Take care to delete only the folder for the instance you are removing. Deleting the application folder will remove all instances of the deployed application.

Note: If the instance files are not removed from the deployment server, the application instance can still be installed by users who follow the link to the deployed application.

9. Follow the steps above to remove the installed instance from all client workstations (see, Removing a Deployed Application Instance from Client Workstations).

Note: Until the instance is removed from client workstations, the application instance can still be used by client workstations, even if it is removed from the deployment server.

Completely Removing a Deployed Application

To completely remove a deployed application:

1. Follow the steps above to remove all instances of the deployed application from the deployment server (see, Removing a Deployed Application Instance from the Deployment Server).
2. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
3. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
4. Locate the installed application in the list of programs (e.g., **Hyland Agenda** or **Hyland Agenda Deployment**).
5. Select the application and click **Change/Remove**. The application and deployment package is removed.

Note: Removing the last deployed application from the deployment server also removes the **Deployment Wizard** from the deployment server.

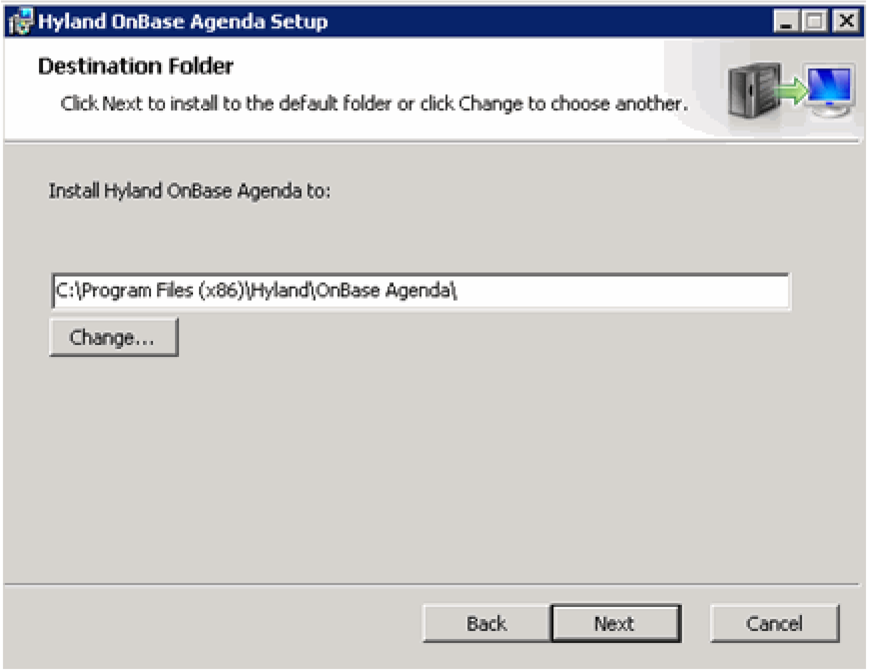
6. Follow the steps above to remove all instances of the deployed application from all client workstations (see, Removing a Deployed Application Instance from Client Workstations).

Note: Until all instances of the application are removed from client workstations, the application can still be used by client workstations, even if it is removed from the deployment server.

Agenda Installer

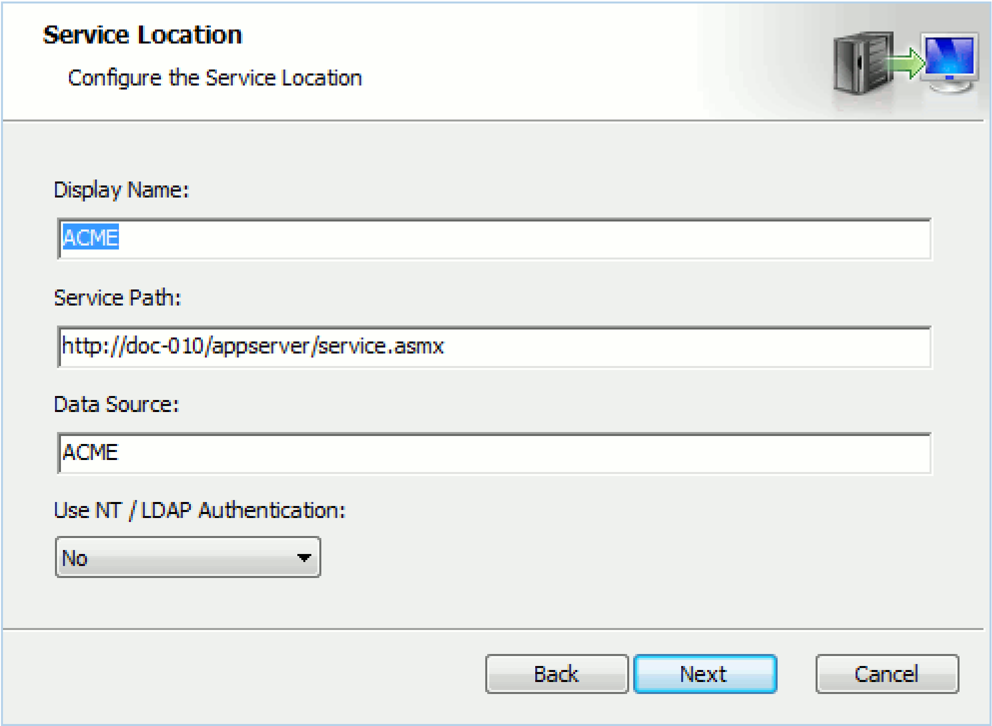
The Agenda installer (**Hyland Agenda.msi**) is located in the **install\Hyland OnBase Agenda** folder of your OnBase Core Services build.

1. Double-click **Hyland OnBase Agenda.msi**.
2. Click **Next** at the welcome dialog. The **Destination Folder** dialog box is displayed.



3. At the **Destination Folder** dialog box, select the local folder to install the components to. By default, components are installed to **C:\Program Files(x86)\Hyland\OnBase Agenda**. Click **Change** to select a different folder for the installation.

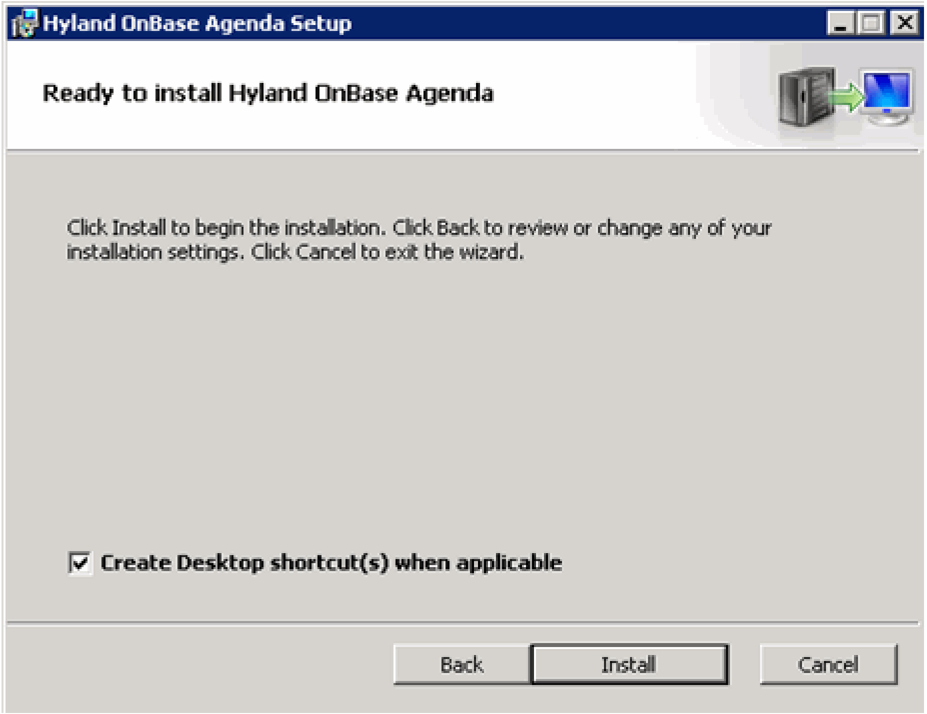
4. Click **Next**. The **Service Location** screen displays.



5. Specify the following:

Setting Name	Description
Display Name	Type the display name of the service location. For example, OnBase.
Service Path	Type the URL to the **Service.asmx** page of the Application Server.
Data Source	Type the data source name (configured at the Application Server) that Agenda will connect to. For example, OnBase.
Use NT/LDAP Authentication	When **Yes** is selected, NT/LDAP Authentication will be used. When **No** is selected, NT/LDAP Authentication will not be used.

6. Click **Next**. The **Ready to install Hyland OnBase Agenda Manager** dialog box displays.



7. If an Agenda desktop shortcut should not be created, deselect the **Create Desktop shortcut(s) when applicable** option.

Note: The **Create Desktop shortcut(s) when applicable** option is selected by default.

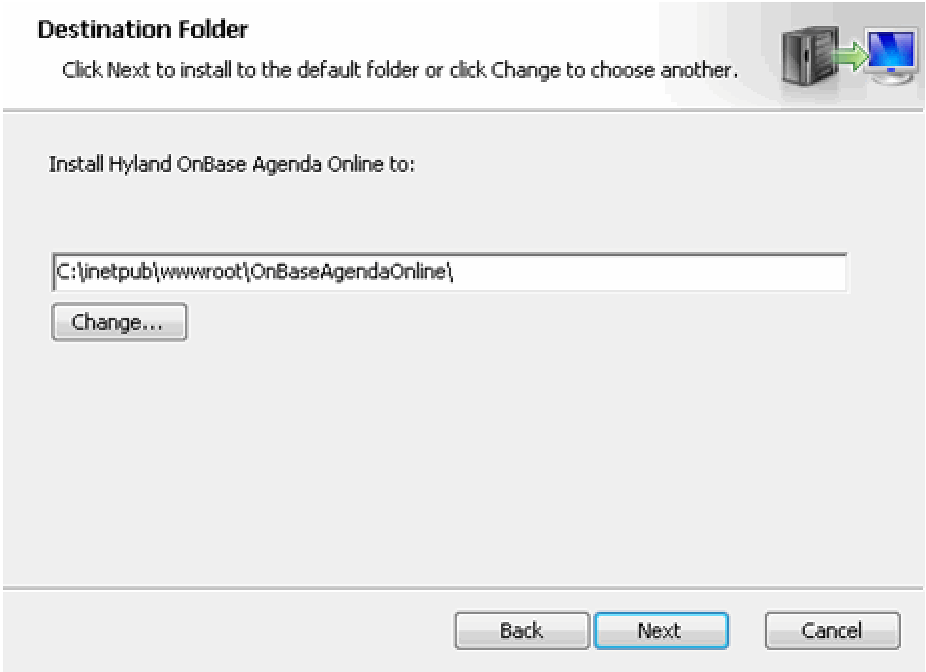
8. Click **Install**.
9. When installation is complete, click **Finish**.

Agenda Online Installer

The Agenda Online installer is located in the **install\Hyland OnBase Agenda Online** folder of your OnBase Core Services build. If you are upgrading your instance of Agenda Online, see for more information.

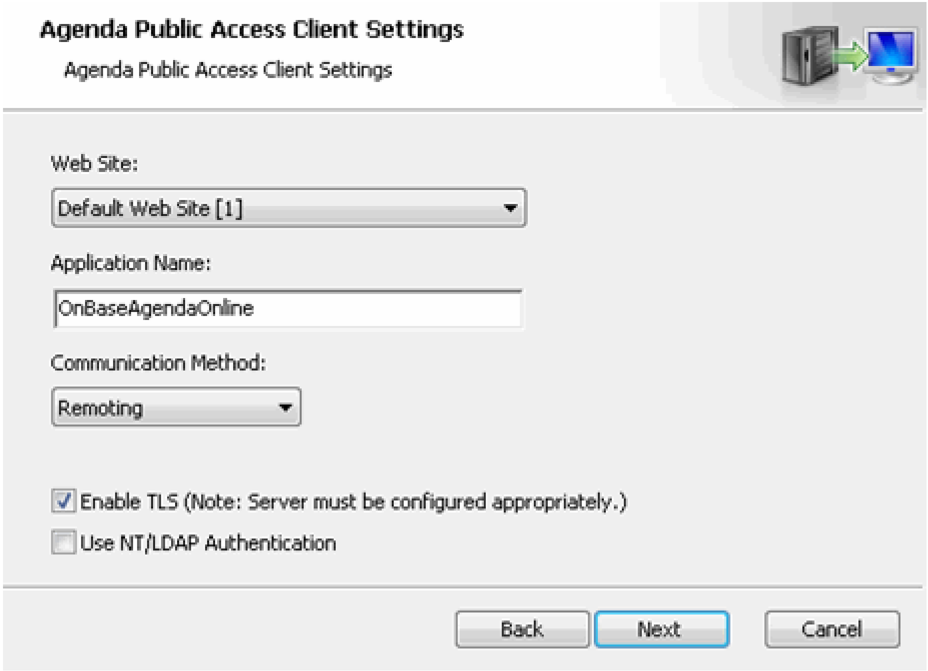
Note: Before installing the Agenda Online application, you must have installed MVC4. Use the following URL to install MVC4: http://www.asp.net/mvc/mvc4.

1. Double-click **setup.exe**.
2. Click **Next** at the welcome dialog. The **Destination Folder** dialog box is displayed.



3. At the **Destination Folder** dialog box, select the local folder to install the components to. By default, components are installed to **C:\inetpub\wwwroot\OnBaseAgendaOnline**. Click **Change** to select a different folder for the installation.

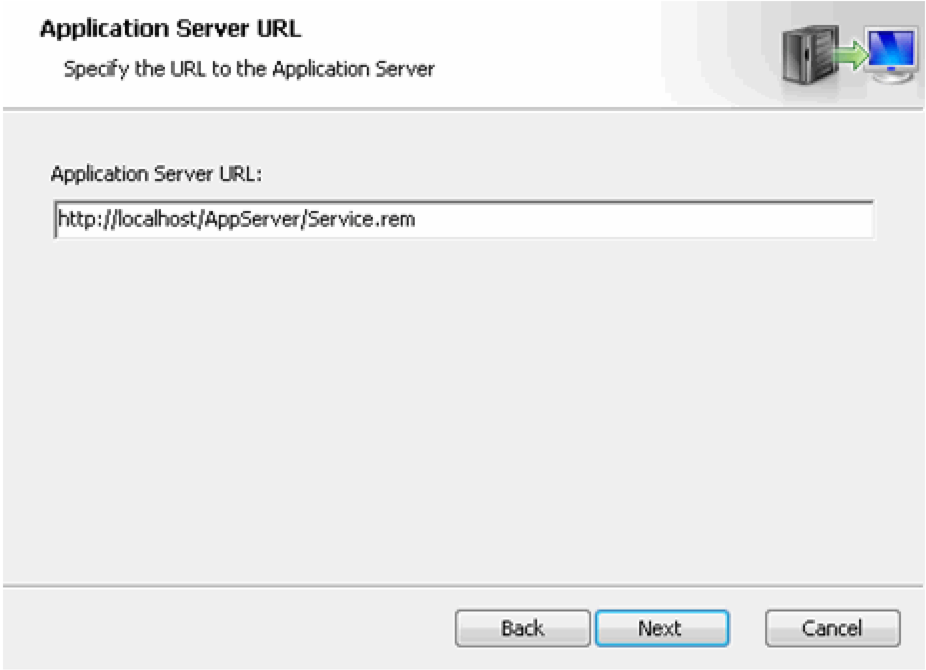
4. Click **Next**. The **Agenda Public Access Client Settings** screen is displayed.



5. Specify the following:

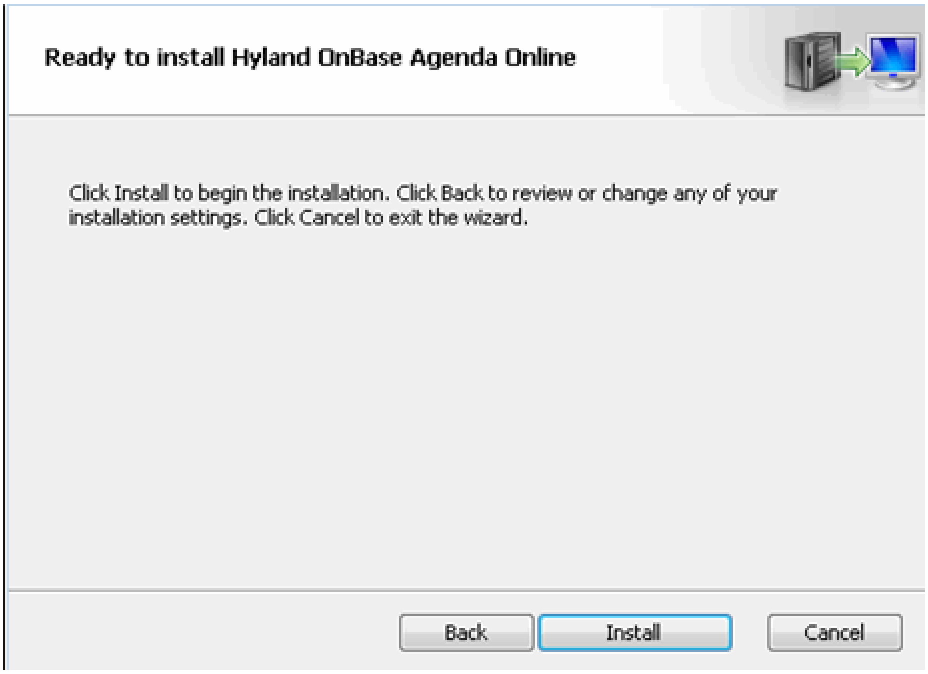
Setting Name	Description
Web Site	Select a default Web site that is used to display the application.
Application Name	The name of the application. It is entered by default. If you need to change it, you can enter a new value.
Communication Method	Choose how the application will communicate with the Web site. Option include SOAP and Remoting.
Enable TLS	Select this check box to run the Web Server with an HTTPS connection. If this option is selected, you must ensure that your server is correctly configured for HTTPS connections. If this option is deselected then an insecure network connection is used. You are prompted to acknowledge that you understand the risks associated with disabling this security layer before you can proceed with the installation.
Use NT/LDAP Authentication	When the check box **is** selected, NT/LDAP Authentication will be used. When the check box **is not** selected, NT/LDAP Authentication will not be used.

6. Click **Next**. The Application Server URL screen is displayed.



7. In the **Application Server URL** field, enter the full URL to the **Service** page on the OnBase Application Server you are installing. The file extension of the service page depends on the **Communication Method** you selected for the Application Server. If you selected **Remoting**, the service page is **Service.rem**. If you selected **SOAP**, the service page is **Service.asmx**.

8. Click **Next**. The **Ready to install Hyland OnBase Agenda Online** dialog box is displayed.



9. Click **Install**.
10. When installation is complete, click **Finish**.

Create an Agenda User in OnBase Config

Before you can use the Agenda Online application, you need to create an Agenda user in the OnBase Config tool. This user is added to the web.config file for Agenda Online, allowing users to access the application.

To create an Agenda user in OnBase Config:

1. Log into the OnBase Config tool.
2. Select the User menu, and then select **User Names/Password**. The User Names & Passwords dialog box is displayed.
3. In the field at the bottom of the dialog box, type a name for your Agenda user.
4. Click **Create**. The User Settings dialog box is displayed.
5. In the **Authentication** section, type a password in the **User Password** field. Type it again in the **Verify Password** field.
6. Click **Save**.
7. Select the Users menu, and then select **User Groups/Rights**. The User Groups & Rights dialog box is displayed.
8. Create a user group for your new user.
9. Click **Members**. The User Group Members dialog box is displayed.
10. Add the user you just created to the user group, and then click **Close**.

11. Click **Document types**. The Assigning Document Types for <Your Group Name> Group dialog box is displayed.
12. Move any relevant published Agenda documents (Published Agenda, Published Minutes, Published Summary, Published Supporting Materials, Published Meeting Packets, Published Item Cover Sheet, Published Ordinance, Published Resolution) from the **Available for Selection** section to the **Selected for Group** section.
13. Click **Close**, and then click **Exit**.

Modify Application Settings in the Web.Config File

Once the Agenda Online application is installed, and you have created an agenda user, the web.config file must be updated to provide the proper credentials for access to the system.

To update the web.config file:

1. Open the web.config from the OnBaseAgendaOnline directory.
2. Search for the <appsettings> section.
3. Modify the following settings to set up your credentials:
   - <add key="SessionUser" value="" />. Enter the OnBase user that has an account set up to access OnBase.
   - <add key="SessionPassword" value="" />. Enter the password of the user established as the session user.
   - <add key="DataSource" value="[Datasource]" />. Enter the OnBase datasource to connect to for access to the data.

Note: The preferable session-state configuration is InProc. See https://msdn.microsoft.com/en-us/library/system.web.sessionstate.sessionstatemodule.end(v=vs.110).aspx for more information.

4. Select **Save** from the File menu. The application settings are saved in the system.

Note: The <appsettings> section should be encrypted. Go to the following Web site for more information: https://msdn.microsoft.com/en-us/library/zhhddkxy.aspx

Optimize Performance Settings for Agenda Online

In an effort to enhance the speed of the Agenda Online website, cache settings are available in the web.config file. These settings allow you to determine how quickly specific pages are loaded and displayed in the Agenda Online website.

The following settings have been added:

```
<add name="HomeCache" enabled="true" duration="180" location="Any"/>
<add name="ContactCache" enabled="true" duration="3600" location="Any"/>
<add name="MeetingsCache" enabled="true" duration="600" location="Any"/>
<add name="SearchCache" enabled="true" duration="180" location="Any"
    varyByParam="dropid;mtids;searchTerm;dropsv;dropev"/>
<add name="ListCache" enabled="true" duration="180" location="Any"
```

```
    varyByParam="dropid;mtids;dropsv;dropev"/>
<add name="MeetingCache" enabled="true" duration="600" location="Any"
    varyByParam="id"/>
<add name="MeetingAccessibleCache" enabled="true" duration="600"
location="Any"
    varyByParam="meetingId;type"/>
<add name="AgendaDocumentCache" enabled="true" duration="600"
location="Any"
    varyByParam="meetingId"/>
<add name="ItemsCache" enabled="true" duration="180" location="Any"
    varyByParam="meetingId;itemId;isSection;type"/>
<add name="StyleCache" enabled="true" duration="43200" location="Any"/>
```

The caching profiles are mapped to the following pages in the Agenda Online website:

Profile	Web Site Page
HomeCache	The Home page for Agenda Online.
ContactCache	The Contact page.
MeetingsCache	The Meetings page.
SearchCache	The Search page.
List Cache	The List page listing all meetings.
MeetingCache	The Meeting View page.
MeetingAccessibleCache	The Accessible portion of the Meeting View page.
AgendaDocumentCache	The Agenda/Minutes/Summary portion of the Meeting View page.
ItemsCache	The selected Section/Item portion of the Meeting View page.
StyleCache	The website’s style sheet.

For each caching profile, you can configure the following options:

Option	Description
Name	The name of the caching profile. This value cannot be modified.
Enabled	Determines whether the caching profile is enabled. Valid values include: • True • False
Duration	The length of time (in seconds) the cache will last.

Option	Description
Location	The location where the caching occurs. Valid values include: • Any • Client • Downstream • None • Server • ServerAndClient
varyByParam	If defined, this is a semicolon-separated list of the URL parameters by which the cache is defined. For example, the AgendaDocumentCache varies by the particular Meeting ID, which is based on the value of meetingId.

Controlling the Installer from the Command Line

The Agenda installer can be run from an installation CD or a local drive. If upgrading from a previous installation that used the Agenda installer, it is not necessary to uninstall the old components before running the installer.

Agenda Command Line Properties

The following properties can be applied to the command line to configure Agenda settings:

Property Name	Description
CREATE_DESKTOP_SHORTCUTS	Set this property to **1** to create a Desktop shortcut. If a Desktop shortcut should not be created, leave this property empty.
CREATE_MENU_SHORTCUTS	Set this property to **1** to create a Program Menu shortcut. If a Program Menu shortcut should not be created, leave this property empty.
SERVICE_LOCATION_DATA_SOURCE	Set this property to the data source name (configured at the Application Server) that the Agenda will connect to. For example, OnBase.
SERVICE_LOCATION_DISPLAY_NAME	Set this property to the display name of the service location. For example, OnBase.
SERVICE_LOCATION_NT_AUTH	Set this property to **true** to use NT/LDAP Authentication. Set this property to **false** if NT/LDAP Authentication will not be used.

Property Name	Description
SERVICE_LOCATION_SERVICE_PATH	Set this property to the **Service.asmx** page of the Application Server.

Agenda Online Command Line Properties

The following properties can be applied to the command line to configure Agenda Online settings:

Property Name	Description
SERVICE_LOCATION_DATA_SOURCE	Set this property to the data source name (configured at the Application Server) that the Agenda will connect to. For example, OnBase.
SERVICE_LOCATION_DISPLAY_NAME	Set this property to the display name of the service location. For example, OnBase.
SERVICE_LOCATION_NT_AUTH	Set this property to **true** to use NT/LDAP Authentication. Set this property to **false** if NT/LDAP Authentication will not be used.
SERVICE_LOCATION_ENABLE_SSL	Set this property to **true** to enable SSL. Set this property to **false** to disable SSL.
SERVICE_LOCATION_SERVICE_PATH	Set this property to the **Service.asmx** page of the Application Server.

Troubleshooting

1. **When generating an meeting packet, a "Unable to use Meeting Field to Keyword Mapping" error is logged to the Diagnostics Console, along with the Meeting Field, Keyword Type, and Value.**

   This error occurs when you have keywords that were mapped to meeting type fields but were not populated during document generation.
2. **When copying an agenda item to another meeting, the "To Agenda Section:" field does not populate with agenda sections.**

   This error occurs when you attempt to copy an agenda item to a meeting that has never been opened after it was created. Open the meeting at least once from the **Meeting List** before copying an agenda item into it.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

OnBase Foundation EP5

Agenda

Administration Guide

Foundation EP5

Configuring Agenda

Agenda configuration takes place in the **Agenda Administration** window.

To open the **Agenda Administration** window, from the **File** tab, select **Agenda Administration**.

Note: There is one option that must be selected in OnBase Configuration that allows users to configure Agenda. This option is in **Users | User Groups/Rights**. Select the User Group Name, and then select **Product Rights**. Ensure that the **Configuration** option is selected in the Product Rights dialog box.

Agenda configuration involves creating and configuring the following:

1. **Authentication Options** - This option is configured in the Agenda configuration file. This configuration determines how you login to the Agenda module. See Configuring Standard or IdP Authentication on page 62 for more information.
2. **Setting Display Options**. This tab allows you to determine which columns are visible in the Workflow Items pane on the Agenda main screen. See Setting Display Options on page 62 for more information.
3. **Agenda Items** - Including:
   - **Status Types** - See Agenda Item Status Types on page 65 for more information.
   - **Fields** - See Configuring Agenda Item Fields on page 66 for more information.
   - **Supporting Document Types** - See Configuring Agenda Item Supporting Document Types on page 68 for more information.
   - **Types** - See Configuring Agenda Item Types on page 72 for more information.
4. **Meeting Body** - Including:
   - **Members** - See Adding Members on page 78 for more information.
   - **Roles** - See Configuring Roles on page 84 for more information.
   - **Bodies** - See Configuring Meeting Bodies on page 87 for more information.
5. **Document** - Including:
   - **Agenda Document** - See Configuring Agenda Document Templates on page 114 for more information.
6. **Packet Configuration** - Including:
   - **Text Overlay** - See Configuring Text Overlays on page 119 for more information.
   - **Meeting Packet** - See Configuring Meeting Packets on page 128 for more information.
   - **Agenda Item Packet -** See Configuring Agenda Item Packets on page 132 for more information.
7. **Meeting Types** - Including:
   - **Agenda Outline -** See Configuring Agenda Outline on page 92 for more information.

- **Types** - See Configuring Meeting Types on page 99 for more information.

8. **Type Configuration** - Including:
    - **Attendance Status Types** - See Configuring Attendance Status Types on page 134 for more information.
    - **Motion Result Types** - See Configuring Motion Result Types on page 136 for more information.
    - **Vote Types** - See Configuring Vote Types on page 138 for more information.\
9. **Public Access Configuration** - Including:
    - **Options** - See Configuring Agenda Online on page 139 for more information.
    - **Page Maps** - See Configuring Agenda Online on page 139 for more information.
    - **Page Styles** - See Configuring Agenda Online on page 139 for more information.

Configuring Standard or IdP Authentication

When you login to the Agenda module, you can login using either the Standard Authentication or the Hyland Identity Provider (IdP) server.

You can specify the option you want to use in the `<ServiceLocations>` section in the obagneda.exe.config file, located in the following directory: **C:\Program Files (x86)\Hyland\OnBase Agenda\.**

See the **Identity and Access Management Services** module reference guide for more information.

Setting Display Options

Display options can be set for agenda items, or for the Voting Client. Options selected here determine how items are displayed when working in these areas.

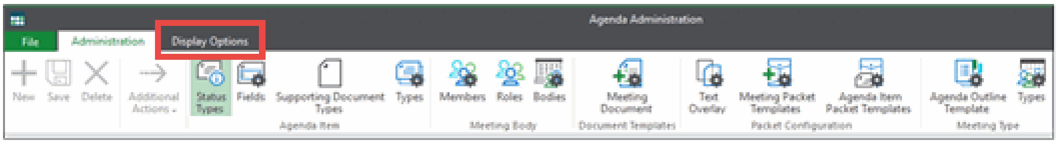
Setting Agenda Item Display Options

In the main Agenda screen, a list of agenda items can be viewed in the Workflow Items pane. There are several default columns that provide information for each agenda item. There are also additional columns available that can provide more information for each agenda item. These columns are enabled using the **Display Options** tab in the **Agenda Administration** window. The columns include:

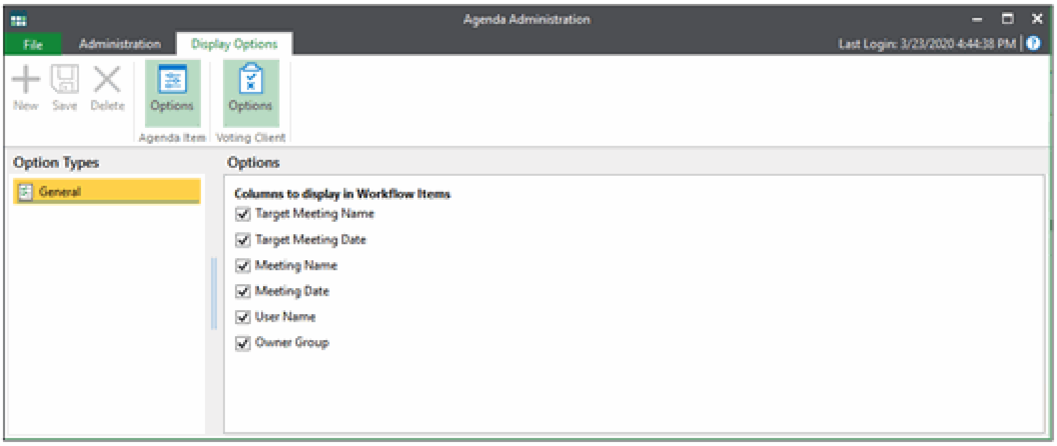
- Target Meeting Name
- Target Meeting Date
- Meeting Name
- Meeting Date
- User Name
- Owner Group

To enable columns for Workflow Items:

1. On the **Agenda Administration** screen, select the **Display Options** tab.



2. Click the **Options for Agenda Item** button.
   The **Agenda Item Display Options** are displayed.



3. Select the columns you want to display in the **Workflow Items** pane on the Agenda screen.
4. Click **Save**.

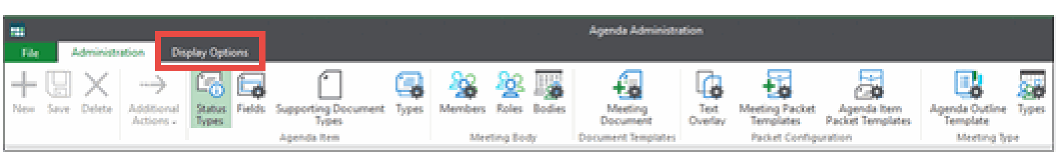
Setting Voting Client Display Options

If a meeting has been enabled for viewing in the Voting Client, you can determine the following:

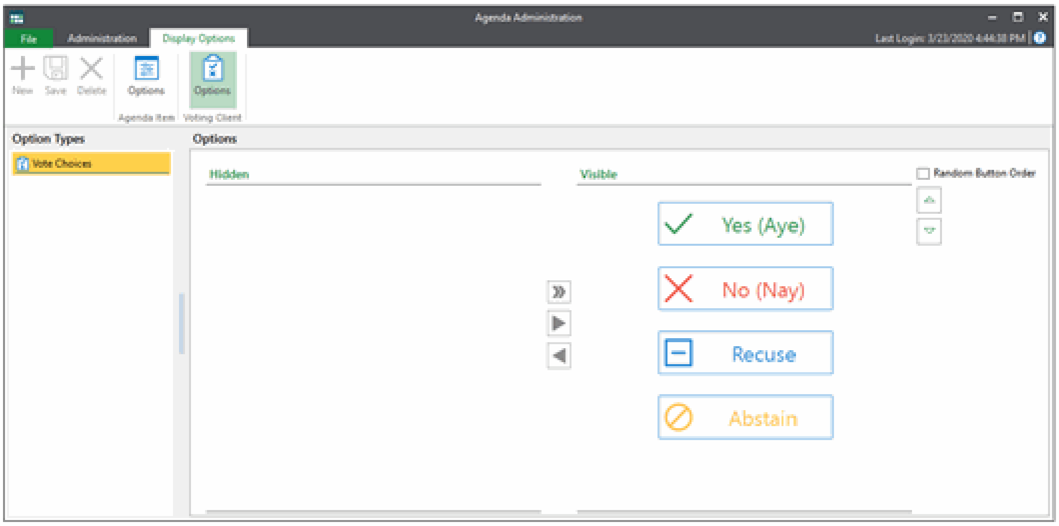
- Which voting buttons are displayed
- The order in which the voting buttons are displayed

To determine how voting buttons are displayed in the Voting Client:

1. On the **Agenda Administration** screen, select the **Display Options** tab.



2. Click the **Options for Voting Client** button.
   The **Voting Client Display Options** are displayed.



3. The voting buttons currently displayed in the Voting Client are listed in the **Visible** section. If you do not want a button to be displayed, select the button, and then click the **Remove Selected Items** arrow to move the button into the **Hidden** section.

Note: You cannot hide the Yes and No voting options.

4. If a button has been hidden and you want to move it to the **Visible** section, select the button from the **Hidden** section, and then click the **Add Selected Items** arrow to move the button into the **Visible** section.
5. Once you have selected the buttons you want to display, do one of the following to determine the order of the buttons as they display in the Voting Client;
   - Select a button to re-order. Use either the **Up** or **Down Button Order** arrows to customize the order of the buttons.
   - Select the **Random Button Order** check box to display the buttons in a random order each time the Voting Client is opened.
6. Click **Save**.

Configuring Agenda Items

Agenda Items are the items you can add to an agenda that will be included in a meeting. During the meeting, agenda items are able to have motions, votes and minutes applied to them. There are four areas that can be configured for agenda items:

- Status Types
- Fields
- Supporting Document Types
- Types

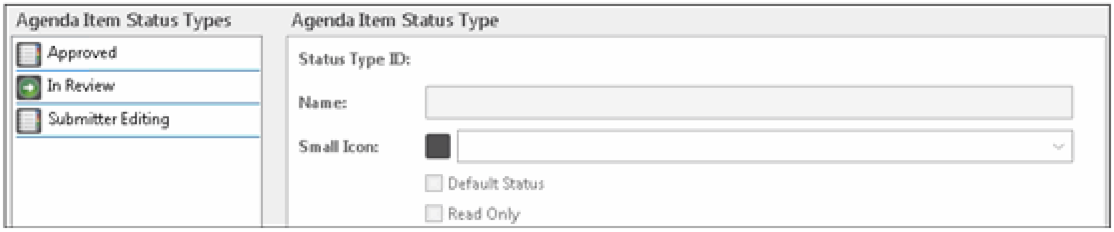
Agenda Item Status Types

An agenda item's status can be used to communicate where the agenda item is in the review process, as well as which agenda items will be placed on a meeting's agenda. The configuration of agenda item status types takes place in the **Agenda Administration** window.

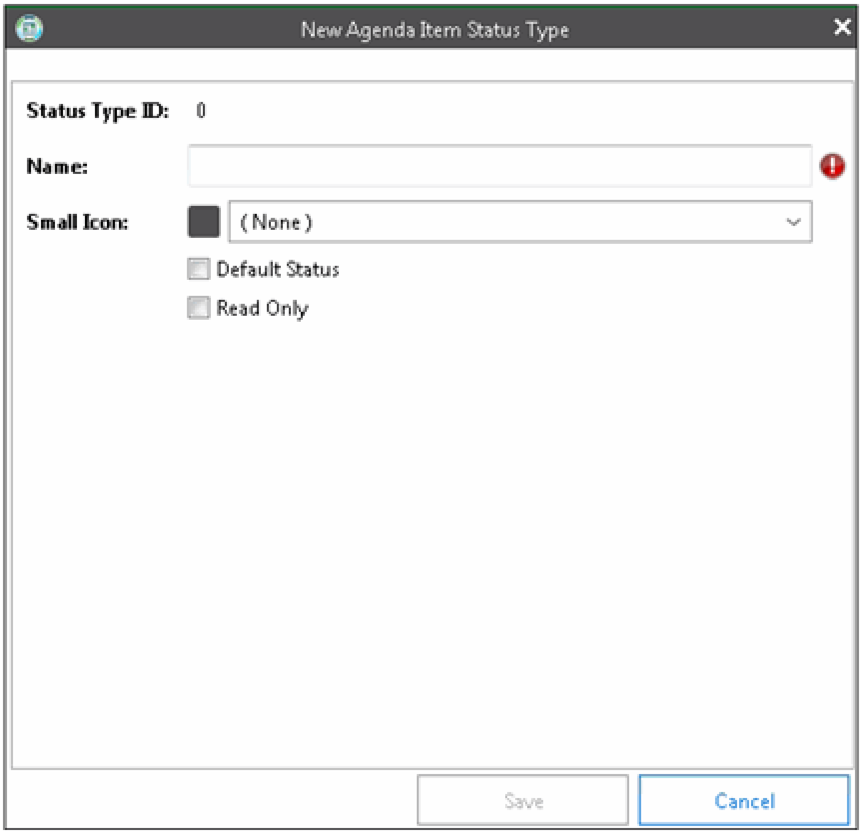
Creating Agenda Item Status Types

To create agenda item status types:

1. On the **Administration** tab, from the **Agenda Item** section, click **Status Types**. The **Agenda Item Status Types** layout displays:



2. On the **Administration** tab, click **New**. The **New Agenda Item Status Type** dialog box displays:



3. In the **Name** field, type a name for the agenda item status type.

4. From the **Small Icon** drop-down list, select an icon from the **SYS System Bitmaps** Document Type that will correspond to the agenda item status type.
5. To make this status the default status of new agenda items, select **Default Status**.

Note: Only one **Agenda Item Status Type** can be designated the default status using the **Default Status** check box.

6. To make this status read-only, select **Read Only**. Any agenda item that is placed in this status can only be edited by an administrator or a user with Edit/Read Only rights.

Note: If an agenda item status is designated as the default status, you cannot set the read only option for this agenda item status type.

7. Click **Save**. The agenda item status type is added to the **Agenda Item Status Types** pane. Take note of the **Status Type ID**. This ID will be used when setting the status of an agenda item in Workflow.

Note: If an agenda item status type has not already been designated as the default status, the newly created agenda item status type is designated as the default status.

Editing Agenda Item Status Types

To edit an agenda item status type from the **Agenda Item Status Types** layout:

1. In the **Agenda Item Status Types** pane, select an existing agenda item status type.
2. In the **Agenda Item Status Type** pane, edit the agenda item status type according to the instructions in Creating Agenda Item Status Types on page 65.
3. On the **Administration** tab, click **Save** to save changes.

Deleting Agenda Item Status Types

To delete an agenda item status type from the **Agenda Item Status Types** layout:

1. In the **Agenda Item Status Types** pane, select an existing agenda item status type.
2. On the **Administration** tab, click **Delete** to delete the agenda item status type.
3. You are prompted to confirm that you want to delete the agenda item status type.
4. Click **Yes** to delete the agenda item status type. Click **No** to cancel deletion.

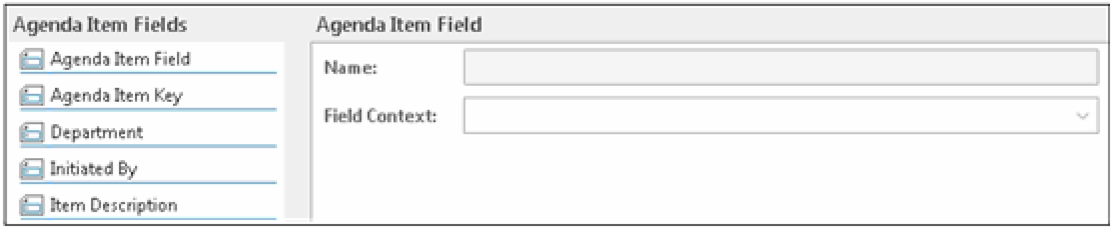
Configuring Agenda Item Fields

Agenda item fields are used to store and track information about agenda items, or to store information related to a meeting section. Agenda item fields that are associated with agenda item types can be used on an agenda item data entry form, or in Workflow to get and set information related to an agenda item. The configuration of agenda item fields takes place in the **Agenda Administration** window.

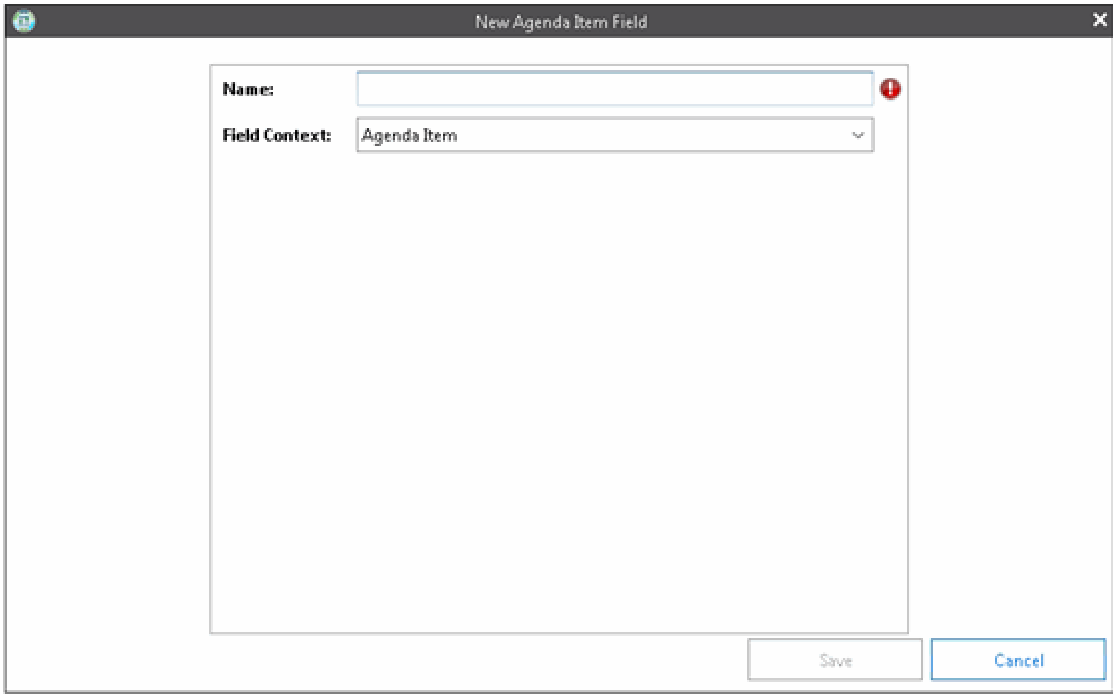
Creating an Agenda Item Field

To create an agenda item field:

1. On the **Administration** tab, from the **Agenda Item** section, click **Fields**. The **Agenda Item Fields** layout displays:



2. On the **Administration** tab, click **New**. The **New Agenda Item Field** dialog box displays:



3. In the **Name** field, type a name for the agenda item field.

4. From the **Field Context** drop-down list, select one of the following:
    - **Agenda Item** - Select if this new agenda item field is agenda item text, and should be available on the **Assigned Fields** tab when configuring an agenda item.
    - **Section** - Select if this new agenda item field is section text, and should be available to users who right-click an agenda section and select **New Section Text**.
5. Click **Save**.The agenda item field is added to the **Agenda Item Fields** pane.

Editing an Agenda Item Field

To edit an agenda item field from the **Agenda Item Fields** layout:

1. In the **Agenda Item Fields** pane, select an existing agenda item field.
2. In the **Agenda Item Field** pane, type a new name for the agenda item field.
3. On the **Administration** tab, click **Save** to save changes.

Deleting an Agenda Item Field

To delete an agenda item field from the **Agenda Item Fields** layout:

1. In the **Agenda Item Fields** pane, select an existing agenda item field.
2. On the **Administration** tab, click **Delete**.
3. You are prompted to confirm that you want to delete the agenda item field.
4. Click **Yes** to delete the agenda item field. Click **No** to cancel deletion.

Note: You cannot delete an agenda item field that is assigned to an agenda item type.

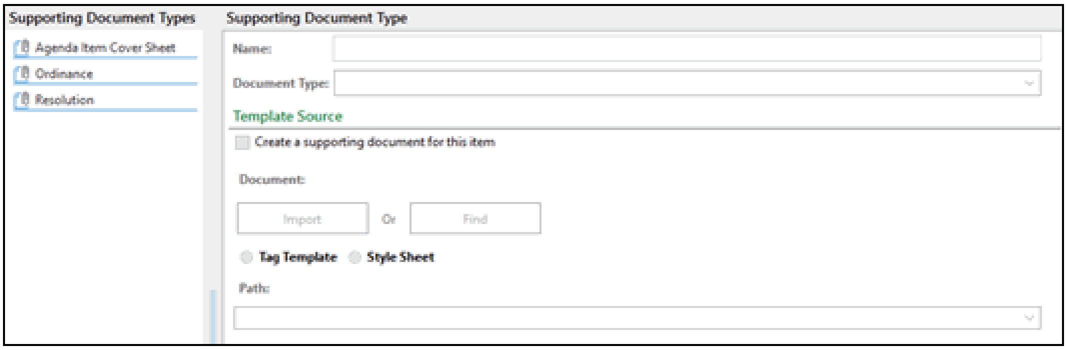
Configuring Agenda Item Supporting Document Types

Agenda item supporting documents are OnBase documents that are associated to specific agenda items for the purpose of providing further details and information about an agenda item. You can configure the OnBase Document Type that is used to store an agenda item's supporting documents within the **Agenda Administration** window.

Creating Agenda Item Supporting Document Types

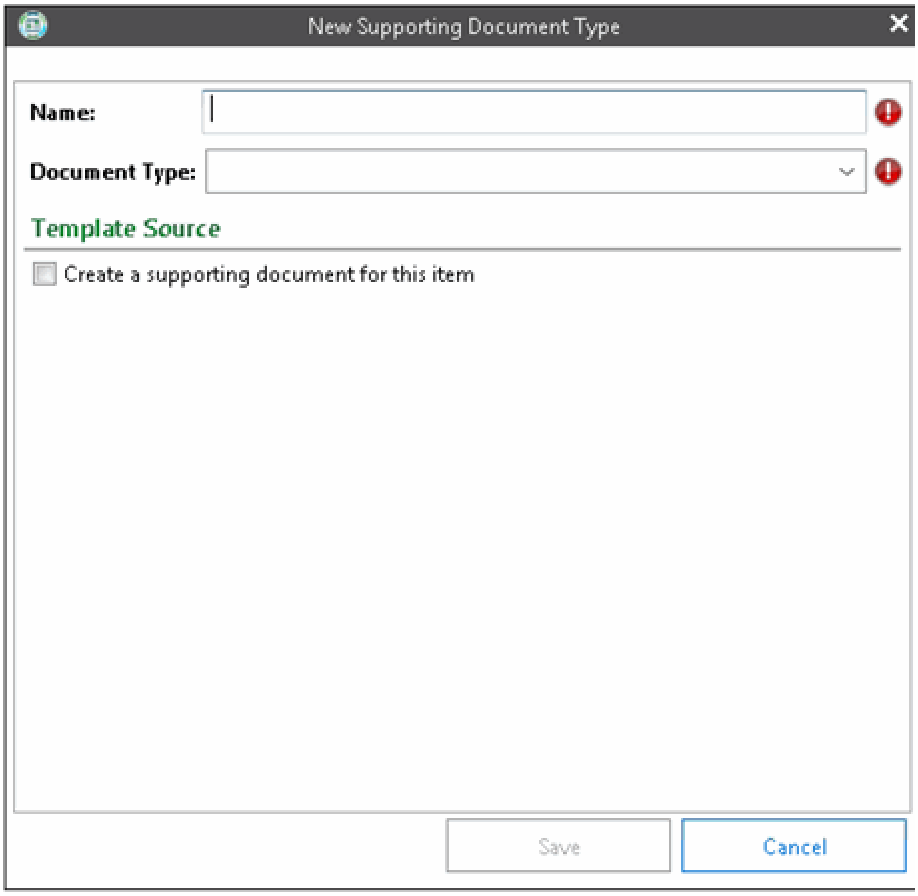
To create agenda item supporting document types:

1. On the **Administration** tab, from the **Agenda Item** section, click **Supporting Document Types**. The **Supporting Document Types** layout displays:



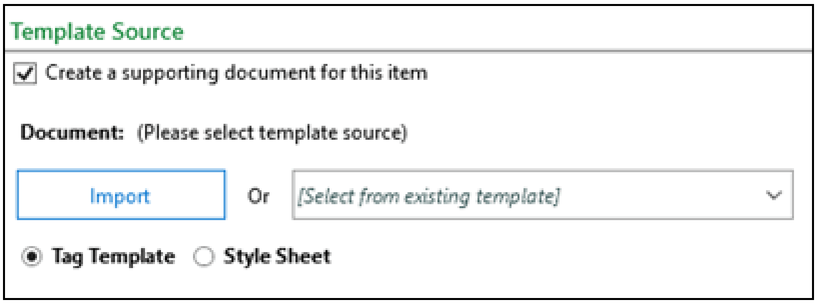
Note: Document Composition is no longer available.

2. On the **Administration** tab, click **New**. The **New Supporting Document Type** dialog box displays:



3. In the **Name** field, type a name for the agenda item supporting document type.
4. From the **Document Type** drop-down list, select the OnBase Document Type that will be used to store the agenda item supporting document type.
5. To create a supporting document for this item, select **Create a supporting document for this item**.

6. Do one of the following to select a supporting document:
   - Click **Import** to select a template source. You will be asked to pick a local document, and then import the document into OnBase.
   - If you have previously uploaded a local document template, a drop-down list is displayed, allowing you to select an existing document template.



7. Select one of the following:

Template Source	Description
Tag Template	Select to use a pre-existing tag template to create the generated document. For more information on creating a Tag Template, see Agenda Tag Templates on page 159. **Note:** To have access to the most functionality available in Agenda, it is recommended that you use the Tag Template.
Style Sheet	Select to use a pre-existing **.xslt** style sheet to create the generated document. Select the drop-down list to select the file type of the supporting document. **Note:** Style sheets are primarily used by legacy customers that already have custom style sheets for Agenda and Minutes documents. They can also be used for creating custom meeting data output in XML, HTML, or Text formats. Style sheets are not available for Summary documents and they are not compatible with publishing to Agenda Online. For Agenda Online, the tag template is the recommended meeting document template source option.

8. Click **Save**. The agenda item supporting document type is added to the **Supporting Document Types** pane.

Editing Agenda Item Supporting Document Types

Note: Because Document Composition is no longer available, any templates created using Document Composition cannot be edited. You must select a new template type instead.

To edit an agenda item supporting document type from the **Supporting Document Types** layout:

1. In the **Supporting Document Types** pane, select an existing agenda item supporting document type.
2. In the **Supporting Document Type** pane, edit the agenda item supporting document type according to the instructions in Creating Agenda Item Supporting Document Types on page 69.
3. To modify the existing **Template Source**, do one of the following:
   - Click **Import** to import a local file into OnBase to be used as the template source.
   - If document templates already exist in the system, select it from the **Select from existing template** drop-down list.
   - Click **Find** to select a document that already exists in OnBase.
4. On the **Administration** tab, click **Save** to save changes.

Deleting Agenda Item Supporting Document Types

To delete an agenda item supporting document type from the **Supporting Document Types** layout:

1. In the **Supporting Document Types** pane, select an existing agenda item supporting document type.
2. On the **Administration** tab, click **Delete** to delete the agenda item supporting document type.
3. You are prompted to confirm that you want to delete the agenda item supporting document type.
4. Click **Yes** to delete the agenda item supporting document type. Click **No** to cancel deletion.

Note: You cannot delete an agenda item supporting document type that is assigned to an agenda item type.

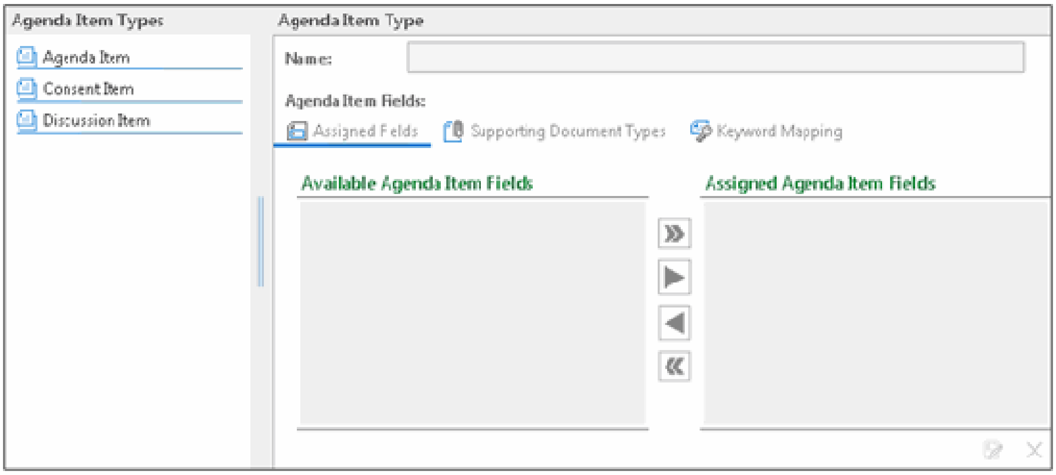
Configuring Agenda Item Types

Agenda item types are used to group and classify agenda items. The configuration of agenda item types takes place in the **Agenda Administration** window.

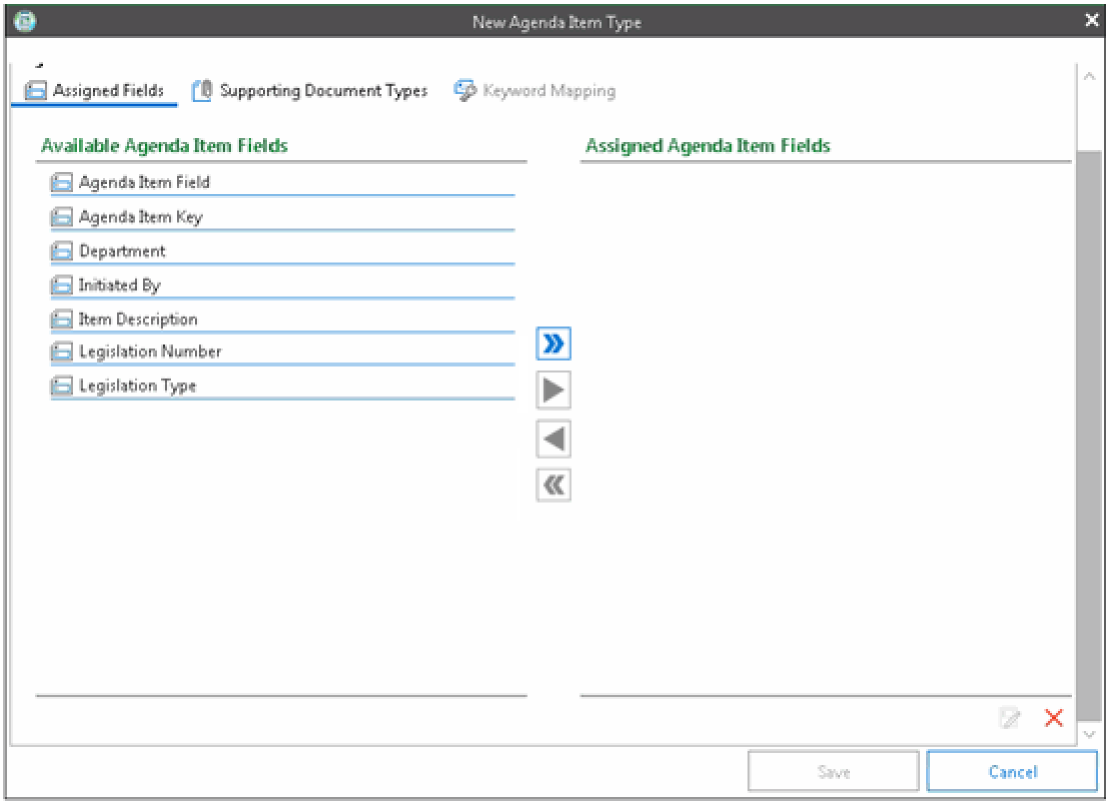
Creating an Agenda Item Type

To create an agenda item type:

1. On the **Administration** tab, from the **Agenda Item** section, click **Types**. The **Agenda Item Type** layout displays:



2. On the **Administration** tab, click **New**. The **New Agenda Item Type** dialog box displays:



3. In the **Name** field, type a description of the agenda item type.

4. On the **Assigned Fields** tab, specify the agenda item fields that should be added to the agenda item type.

   Double-click an agenda item field in the **Available Agenda Item Fields** list to add it to the agenda item type. You can also select one or more agenda item fields and click **Add Selected Items**:

   Add all agenda item fields by clicking **Add All Items**:

5. The selected agenda item fields are displayed in the **Assigned Agenda Item Fields** list.

   To remove an agenda item field from this list, double-click it. You can also select one or more agenda item fields from the **Assigned Agenda Item Fields** list and click **Remove Selected Items**:

   Remove all agenda item fields by clicking **Remove All Items**:

6. If you want the information entered in this new field to display as the Title for the agenda item on the generated Minutes, Agenda or Summary document, click the **Title** icon:

   The agenda item name displays in the Agenda and Minutes tree, but when you generate the Agenda, Minutes or Summary document, the name is replaced with the information entered into the field you designated as the Title field. For example, if the agenda item name is Item 1, and the field designated as the Title field is Item Description, any information entered into the Item Description field displays in the generated document, whereas Item 1 displays in the tree.

7. On the **Supporting Documents** tab, specify the supporting document types that should be associated with the agenda item type.

   Double-click a supporting document type in the **Available Supporting Document Types** list to add it to the agenda item type. You can also select one or more supporting document types and click **Add Selected Items**:

   Add all supporting document types by clicking **Add All Items**:

8. The selected supporting document types are displayed in the **Assigned Supporting Document Types** list.

   To remove a supporting document type from this list, double-click it. You can also select one or more supporting document types from the **Assigned Supporting Document Types** list and click **Remove Selected Items**:

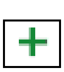
   Remove all supporting document types by clicking **Remove All Items**:

9. Click **Save**. The agenda item type is displayed in the **Agenda Item Types** pane.
10. To map required Keyword Types to the new agenda item type, select the agenda item type from the Agenda Item Types list, then select the **Keyword Mapping** tab.
11. For each available **Agenda Item Field**, select the **Keyword Type** that will be used to store that agenda item field from the corresponding drop-down list.

Note: If mapping to a Required Keyword, and the field on the Agenda Item is not marked as required, when the attachment is added to the item and the item is saved, you will be prompted to enter the missing required keyword. The keyword will be added, but the field on the form will be blank. If you want that same value to display in the agenda item form field, you must edit the agenda item form and manually add the value to the field.To avoid this, you may want to consider marking the field on the form as required as well.

The following buttons are also available while mapping Keyword Types:

Button	Description
	Click to add an additional instance of the corresponding agenda item field.

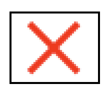
Button	Description
	Click to remove the configured keyword mapping.
	Click to remove all configured keyword mappings.

12. Click **Save**.

Editing an Agenda Item Type

To edit an agenda item type from the **Agenda Item Type** layout:

1. In the **Agenda Item Types** pane, select an existing agenda item type.
2. In the **Agenda Item Type** pane, type a new **Name** for the agenda item type, or modify the list of **Assigned Agenda Item Fields** using the instructions in Creating an Agenda Item Type on page 73.
3. If you need to remove the title field from an agenda item, select the item from the **Assigned Agenda Item Fields** pane, and then click **Remove**.



4. On the **Administration** tab, click **Save** to save changes.

Deleting an Agenda Item Type

Note: Deleting an agenda item type removes it from the list of available agenda item types. It does not affect existing agenda items of this type that are currently associated with a meeting.

To delete an agenda item type from the **Agenda Item Type** layout:

1. In the **Agenda Item Types** pane, select an existing agenda item type.
2. On the **Administration** tab, click **Delete**.
3. You are prompted to confirm that you want to delete the agenda item type.
4. Click **Yes** to delete the agenda item type and reassign any pending agenda items. Click **No** to cancel deletion.

Configuring Agenda Item Forms

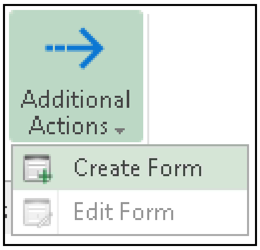
Agenda configuration involves creating agenda item forms. These forms are displayed when users create agenda items in the Agenda.

Agenda item forms are not stored in the OnBase Disk Groups. Instead, when an agenda item form is opened, OnBase pulls the form's values from the database, retrieves the agenda item form template, and populates those agenda item fields with the database values.

Creating an Agenda Item Form Template

To create an agenda item form template:

1. From the **Agenda Administration** window, select an agenda item type from the **Agenda Item Types** pane.
2. On the **Administration** tab, click **Additional Actions | Create Form** to create a form that will be displayed when creating a new agenda item of the selected type.



   An agenda item form template displays. By default, this template contains fields for agenda item title and number.
3. Follow the instructions in the **Unity Forms** module reference guide to configure the template. When working with Agenda forms in Unity, note the following:
   - The following features described in the **Unity Forms** module reference guide are not supported when configuring an agenda item form template: Nested Tables, Text Box, Multiline Text Box, Check Box, Select List, Repeating Section, Table, Signature, Drawing, XML-backed Radio Buttons, Running Unity Scripts via Custom Actions on an Agenda Item.
   - Calculated Fields are not supported for use with Workflow.
   - When working with an entity backed form in Agenda, the Delete, Copy and Save Draft buttons are hidden.
   - Spell check can be enabled in Form Properties, and is supported only in an agenda item form template.

Tip: Although you cannot add **Text Box**, **Multiline Text Box**, **Check Box**, or **Select List** fields directly from the Unity Form **Toolbox**, you can add these fields to an **Agenda Item** field through the **Control Type** drop-down list.

Note: It is considered a best practice to retain the unique ID displayed in the **ID** field, as each field should have a unique ID. Unexpected behavior may occur if two fields share the same ID.

4. Click the red **X** in the upper right corner of the **Submit** button field to remove this field from the agenda item form template. The **Submit** button is not supported for use with the Agenda module.

5. When you have finished configuring the template, publish the template.

Editing an Agenda Item Form Template

To edit a published agenda item form template from the Agenda:

1. From the **Agenda Administration** window, select an agenda item type from the **Agenda Item Types** pane.
2. On the **Administration** tab, click **Additional Actions | Edit Form**. The published agenda item form template is displayed.
3. Edit the template as necessary.
4. When you have finished editing the template, publish the template.

Configuring Meeting Bodies

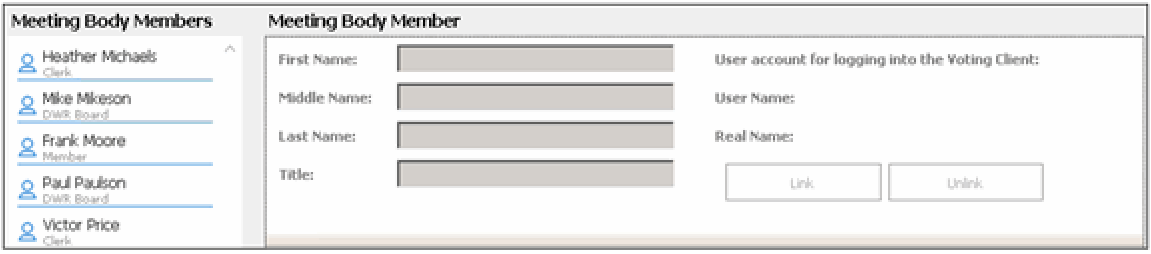
Adding Members

A member is a person that is part of the meeting body that is holding the meeting. The configuration of members takes place on the **Administration** tab.

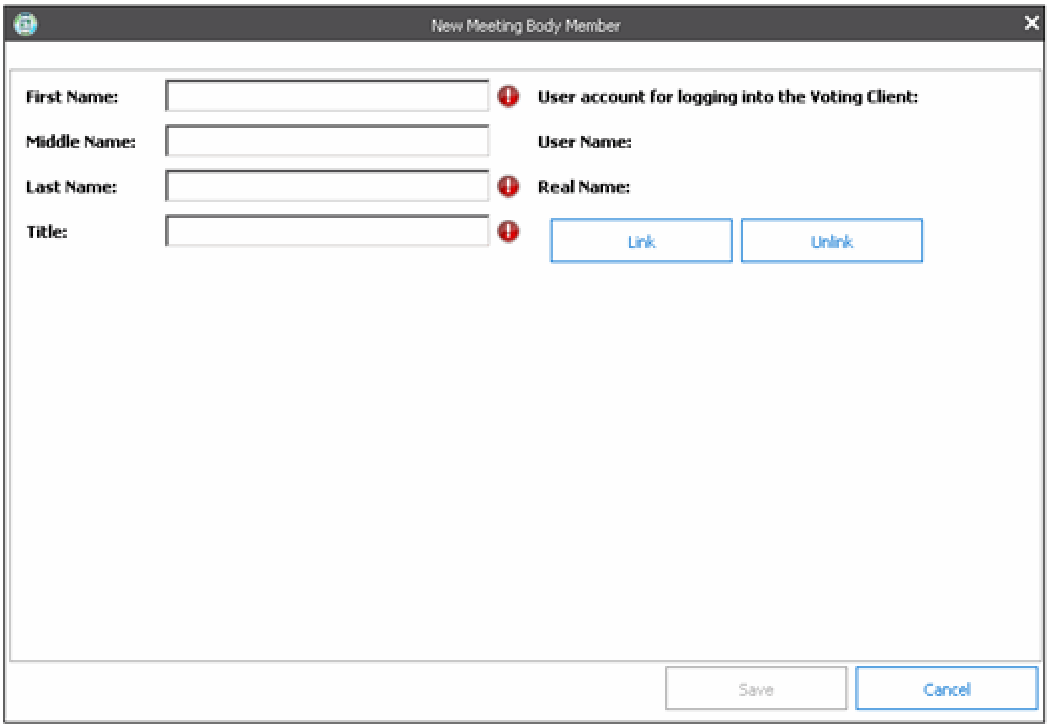
Creating a Member

To create a member:

1. On the **Administration** tab, from the **Meeting Body** section, click **Members**. The **Meeting Body Members** layout displays:

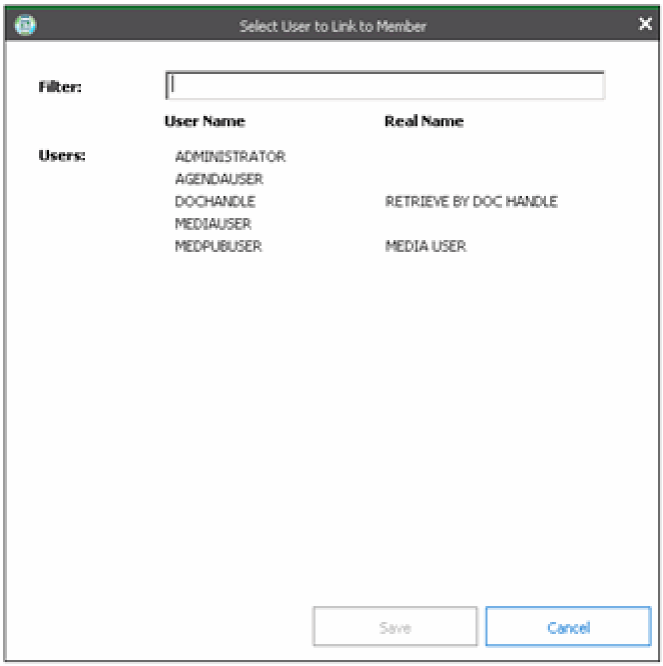


2. On the **Administration** tab, click **New**. The **New Meeting Body Member** dialog box displays:



3. In **First Name**, type the member's first name.
4. In **Middle Name**, type the member's middle name or initial.
5. In **Last Name**, type the member's last name.
6. In **Title**, type the member's title in the meeting body.

7. If this member is going to have access to the Voting Client, you must link them to a user account that exists in the OnBase Config tool. This allows a voting member to log into the Voting Client. Click **Link**. The **Select User to Link to Member** dialog box is displayed.



8. Do one of the following:
   - Type a user name in the **Filter** field to search for the user you want.
   - User your mouse to select a user from the Users list.
9. Click **Save** in the Select User to Link to Member dialog box.
10. Click **Save**. The member is added to the **Meeting Body Members** pane.

Entering Member Contact Information

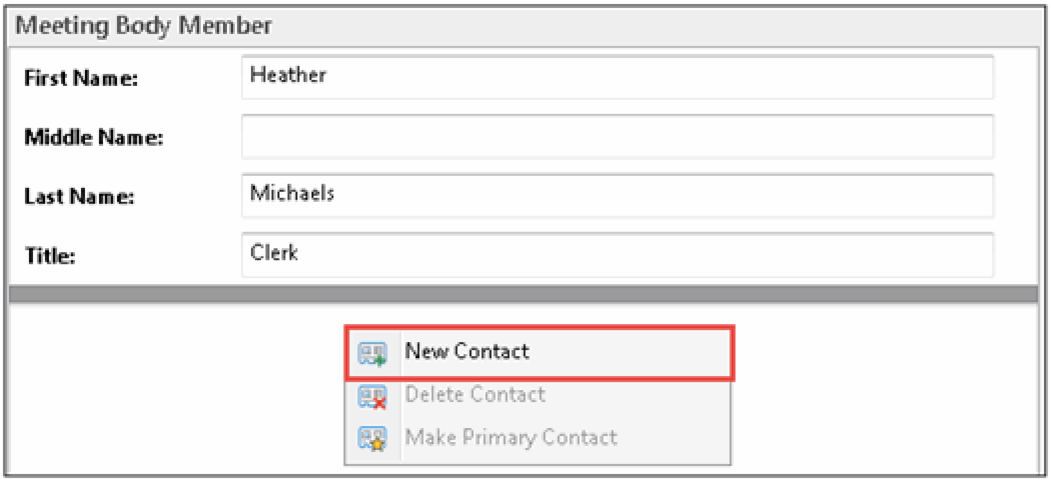
After creating and saving a new member, you can enter contact information for that member.

Creating Member Contact Information

To create member contact information:

1. From the **Meeting Body Members** layout, select a member.
2. Select **New Contact** from one of the following locations:

- Right-click in the area below the **Meeting Body Member** pane and select **New Contact**.



- Select the **Additional Actions** button from the ribbon and select **New Contact**.

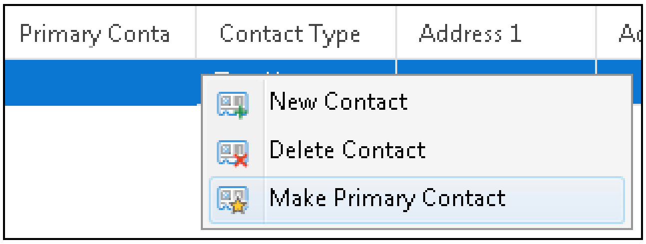
The **New Member Contact** dialog box displays:

The fields in this dialog box are described below:

Field	Description
Contact Type	Type the type of contact (i.e., "Home," "Work," etc.).
Address 1	Type the member’s street address.
Address 2	Type any remaining street address information.
City	Type the member’s city.
State	Select the member’s state from the drop-down list.
Zip Code	Type the member’s zip code.
Phone Number	Type the member’s phone number.
Cell Phone Number	Type the member’s cell phone number.
Fax	Type the member’s fax number.
Email Address	Type the member’s e-mail address.

3. Click **Save**.

After entering contact information for a member, you can designate the primary method that should be used to contact a member by right-clicking and selecting **Make Primary Contact**. The member's primary contact information is noted by the following icon in the Primary Contact column:



Editing Member Contact Information

To edit member contact information:

1. Double-click a row of information below the **Meeting Body Member** pane.
2. Modify the contact information as necessary. For more information on the available settings, see Creating Member Contact Information on page 80.
3. Click **Save**.

Deleting Member Contact Information

To delete member contact information:

1. Select a row of information below the **Meeting Body Member** pane.
2. Perform one of the following actions:
   - Right-click the selected row and select **Delete Contact**.
     or,
   - Select the **Additional Actions** button from the ribbon and select **Delete Contact**
3. Click **Yes** to continue deleting the contact information. Click **No** to cancel deletion.

Editing a Member

To edit a member:

1. Select a member from the **Meeting Body Members** pane.
2. In the **Meeting Body Member** pane, modify the member's information. For more information on the available settings, see Creating a Member on page 78.
3. On the **Administration** tab, click **Save** to save changes to the member.

Deleting a Member

A member can be deleted only if they are not an attendee in an existing meeting.

To delete a member:

1. Select a member from the **Meeting Body Members** pane.
2. On the **Administration** tab, click **Delete** to save changes to the member.
3. You are prompted to confirm that you want to delete the member.

Note: Deleting a member removes the member from the list of current members and removes them from all meeting bodies. Deleting a member will not affect any existing meetings to which the member is currently associated.

4. Click **Yes** to continue deleting the member. Click **No** to cancel deletion.

Configuring Roles

A role is the position held by a member of a meeting body. The primary purpose of role distinctions is to differentiate voting privileges. Roles can be configured to be voting or non-voting. Only members with voting privileges will be listed in the **Motion** pane for agenda items in meeting instances, while Roll Call members will be listed in the roll call list.

Roles are not static. This flexibility allows meeting bodies to rotate roles. For example, a meeting body holds four meetings per month. The responsibility for taking the minutes of each meeting falls on a different member. In this example, the meeting body would create a “minutes” role and assign it to a different member in each meeting.

The configuration of roles takes place takes place on the **Administration** tab.

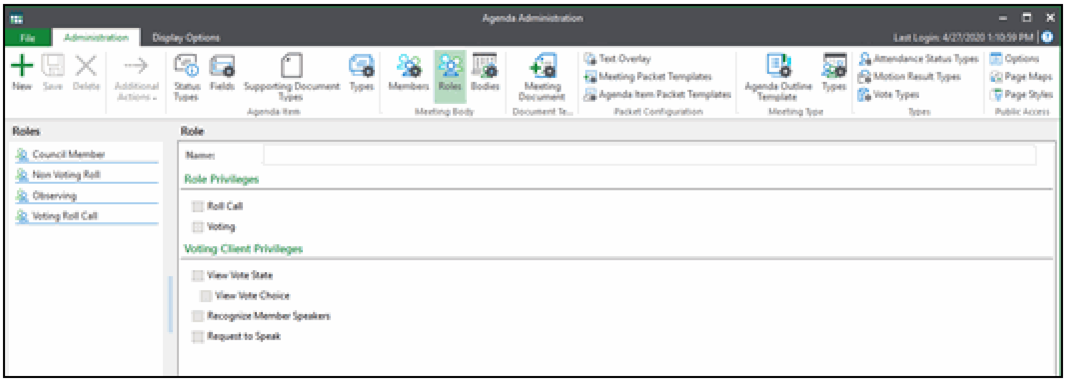
Note: Roles must be configured before a meeting can be run in the OnBase Minutes application. If roles are not configured, a message is displayed in Minutes when first opening the meeting, indicating that you must return to OnBase Agenda to configure the roles.

Creating a Role

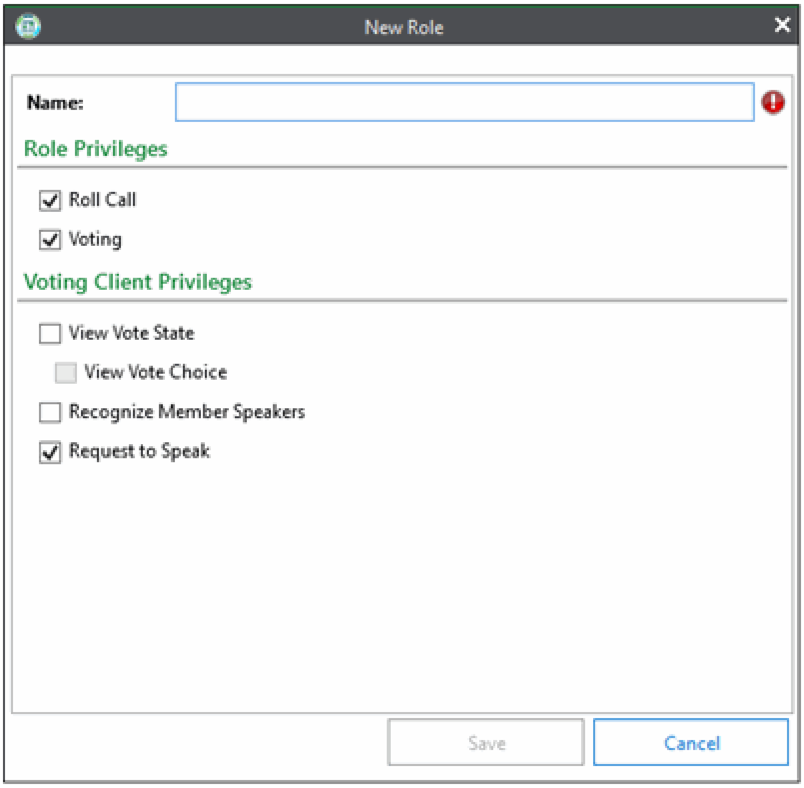
The primary purpose of role distinctions is to differentiate voting privileges. Roles can be configured to be voting or non-voting. Roles are created using the **Administration** tab.

To create a role:

1. On the **Administration** tab, from the **Meeting Body** section, click **Roles**. The **Roles** layout is displayed:



2. On the **Administration** tab, click **New**. The **New Role** dialog box is displayed:



Note: If you are not licensed for Voting, the **Voting** option is disabled, and the **Voting Client Privileges** section is not displayed.

3. In the **Name** field, type a name for the role.

4. Select from the following options in the **Role Privileges** section:

Option	Description
Roll Call	Select this option to allow users to participate in the roll call.
Voting	Select this option to allow users to vote on motions presented in a meeting.

5. If you have a Voting license, select from the following options in the **Voting Client Privileges** section:

Option	Description
Recognize Member Speakers	Select this option if you want the Voting Client to recognize member speakers.
View Vote State	Select this option if you want the vote state to be viewed by members in the Voting Client. Select the **View Vote Choice** option to allow members to view the vote choice of all voting members.
Request to Speak	Select this option to allow members to request to speak as needed. This option is enabled by default.

6. Click **Save**. The role is added to the **Roles** pane.

Editing a Role

To edit a role:

1. Select a role from the **Roles** pane.
2. In the **Roles** pane, modify the configuration of the role. For more information on the available settings, see Creating a Role on page 84.
3. On the **Administration** tab, click **Save** to save changes to the role.

Deleting a Role

Note: You cannot delete a role if it has been assigned to one or more meeting body members or meeting attendees.

To delete a role:

1. Select a role from the **Roles** pane.
2. On the **Administration** tab, click **Delete**.

3. You are prompted to confirm that you want to delete the roll.
4. Click **Yes** to continue deleting the role. Click **No** to cancel deletion.

Configuring Meeting Bodies

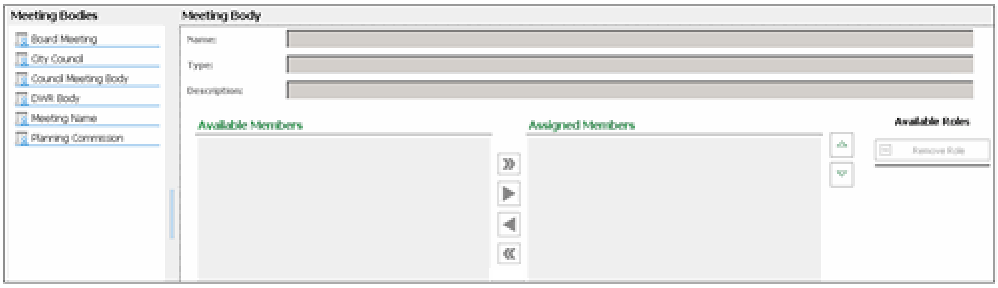
Meeting bodies are the templates used to define the members that will participate in a meeting. Once members and meeting bodies have both been created, they can be associated with each other. Associating and disassociating members and meeting bodies can be accomplished from the **Meeting Body** layout.

The configuration of meeting bodies takes place in the **Agenda Administration** window.

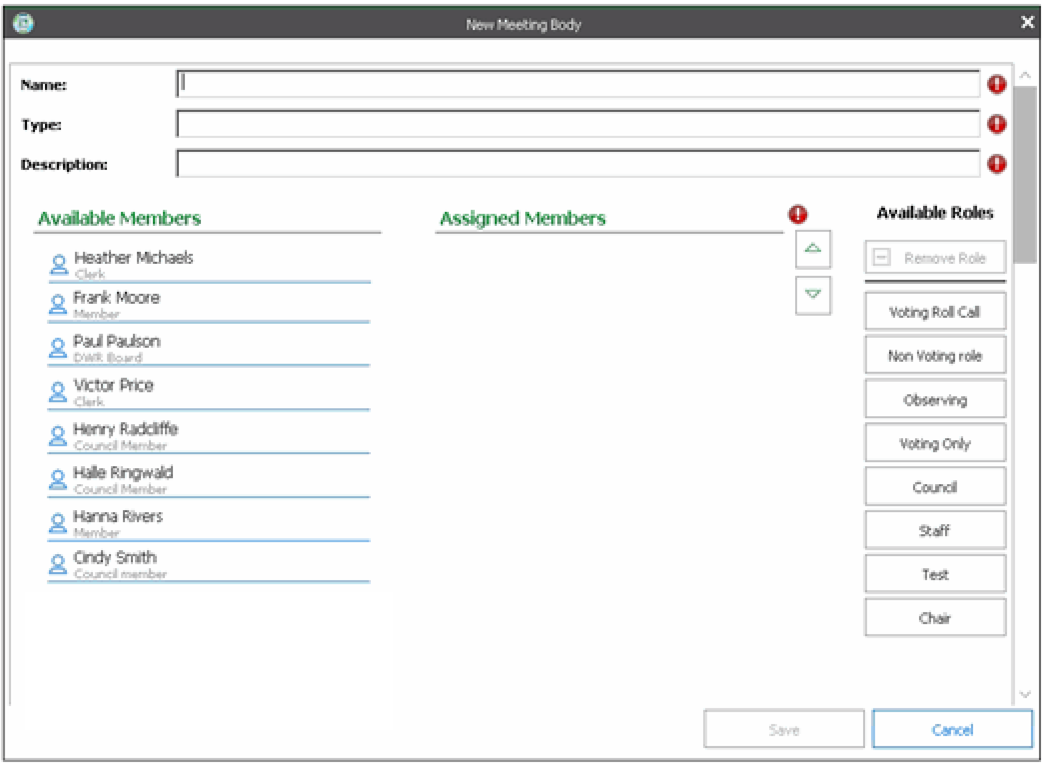
Creating a Meeting Body

To create a meeting body:

1. On the **Administration** tab, from the **Meeting Body** section, click **Bodies**. The **Meeting Bodies** layout displays:



2. On the **Administration** tab, click **New**. The **New Meeting Body** dialog box displays:



3. In the **Name** field, type a name for the meeting body.
4. In the **Type** field, type the type of the meeting body.
5. In the **Description** field, type a description of the meeting body.
6. Select a member, or multiple members using the Ctrl or Shift keys, and use the following buttons:

Button	Description
	Add all members from the **Available Members** list to the **Assigned Members** list.
	Add the selected members from the **Available Members** list to the **Assigned Members** list.
	Remove selected members from the **Assigned Members** list.
	Remove all members from the **Assigned Members** list.

7. The selected member(s) are added to the **Assigned Members** list.

Note: You must assign members to the meeting body. The **Save** button is disabled until members have been assigned.

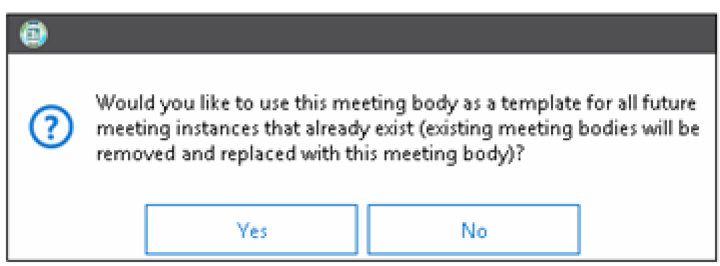
8. To assign a role to a member, or multiple members using the Ctrl or Shift keys, select the member(s) from the **Assigned Members** list. Click the button that corresponds to the role in the **Available Roles** list. The **Assigned Members** list is updated to reflect this role assignment.
9. Use the sort buttons to move meeting members up or down in the member list.

10. Click **Save**.

Remove Members from a Meeting Body

To remove a member from a meeting body:

1. Select the member you want to remove.
2. Click the **Remove Selected Items** button to move the member from the Assigned Member list to the Available Members list.
3. Click **Save**. A message box displays asking if you want to use this meeting body for all future meetings.



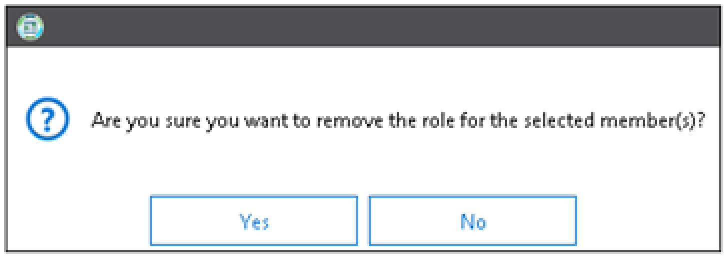
4. Do one of the following:
   - Click **Yes**. This applies the change to this meeting body and uses the meeting body as a template for all future meetings.
   - Click **No**. This applies the change to this instance of this meeting body only. All existing future meetings display the original meeting body, which means that all existing future meetings will still list this member.

Note: You cannot remove all members from a meeting. There must be at least one member assigned to a meeting before the meeting can be saved.

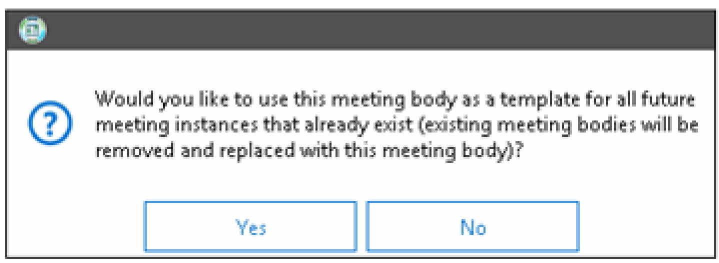
Remove Member Roles from a Meeting Body

To remove member roles:

1. Select the member, or multiple members using the Ctrl or Shift keys, from the **Assigned Members** list.
2. Click **Remove Role** in the **Available Roles** list. A message box displays asking you to confirm the member removal.



3. Click **Yes** to remove the role assignment. Click **No** to retain the role assignment.
4. Click **Save**. A message box displays asking if you want to use this meeting body for all future meetings.



5. Do one of the following:
   - Click **Yes**. This applies the change to this meeting body and uses the meeting body as a template for all future meetings.
   - Click **No**. This applies the change to this instance of this meeting body only. All existing future meetings display the original meeting body, which means that all existing future meetings will still list this member.

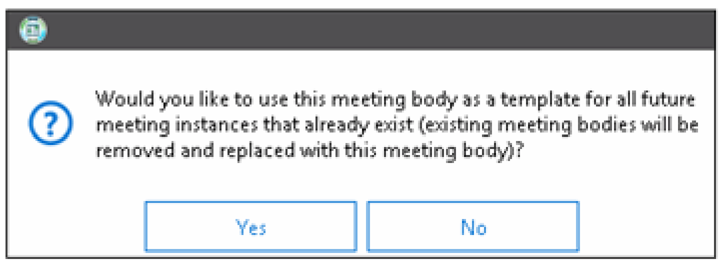
Re-arrange Members in a Meeting Body

You can re-arrange the order of the members in a meeting body. This also rearranges the order of the member in OnBase Minutes.

To re-arrange member in a meeting body:

1. Select the member you want to move.
2. Click the up or down arrows to move the member up or down in the list of members.

3. Click **Save**. A message box displays asking if you want to use this meeting body for all future meetings.



4. Do one of the following:
   - Click **Yes**. This applies the change to this meeting body and uses the meeting body as a template for all future meetings.
   - Click **No**. This applies the change to this instance of this meeting body only. All existing future meetings display the original meeting body, which means that all existing future meetings will display the members in the original order.

Editing a Meeting Body

To edit a meeting body from the **Meeting Bodies** layout:

1. In the **Meeting Bodies** pane, select an existing meeting body.
2. In the **Meeting Body** pane, edit the fields described in Creating a Meeting Body on page 87 as necessary.
3. On the **Administration** tab, click **Save** to save changes.

Deleting a Meeting Body

To delete a meeting body from the **Meeting Bodies** layout:

1. In the **Meeting Bodies** pane, select an existing meeting body.
2. On the **Administration** tab, click **Delete**.
3. You are prompted to confirm that you want to delete the meeting body.
4. Click **Yes** to delete the meeting body. Click **No** to cancel deletion.

Configuring Meeting Types

When configuring meeting types, you must create an agenda outline, and then create meeting types to be used when creating an agenda.

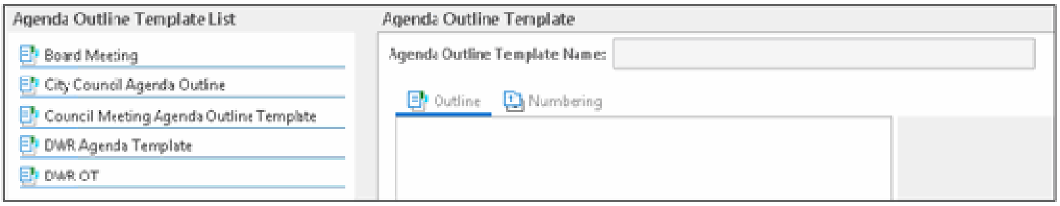
Configuring Agenda Outline

An agenda outline template is used to specify the layout of an agenda before any agenda items are added. Agenda outlines are composed of sections. These sections are used to organize agenda items. The configuration of agenda outline takes place on the **Agenda Outline Template** tab.

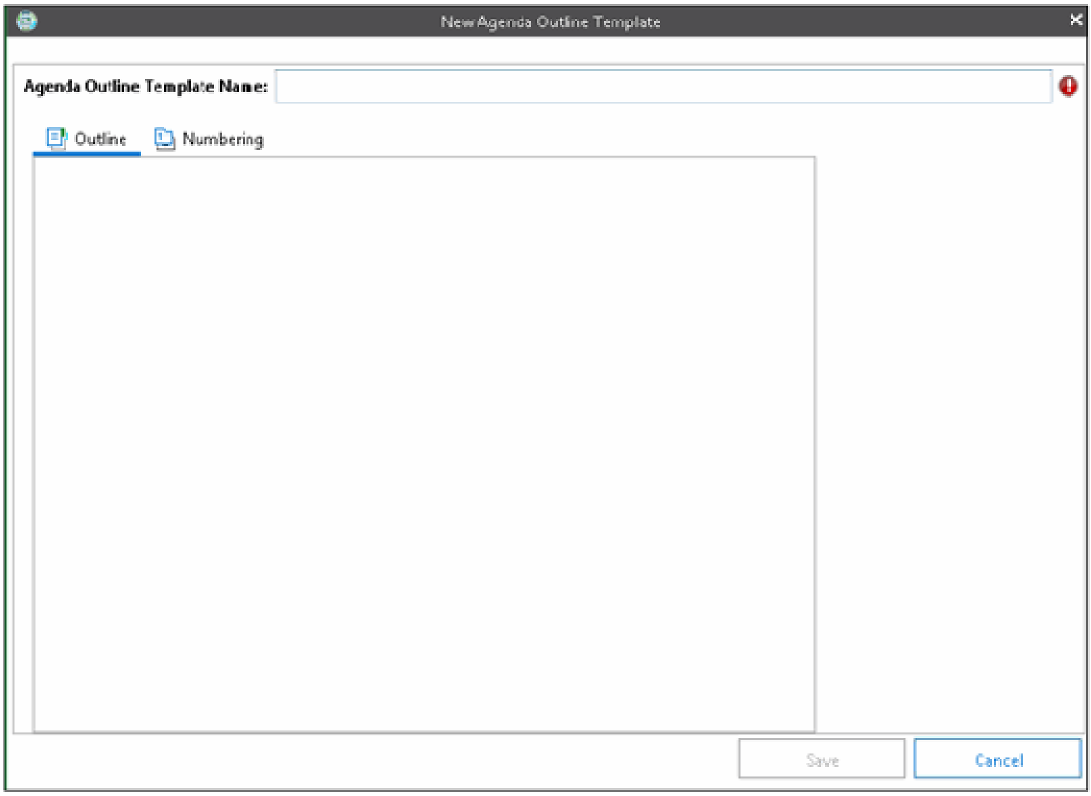
Creating an Agenda Outline Template

To create an agenda outline template:

1. On the **Administration** tab, from the **Meeting Type** section, click **Agenda Outline Template**. The **Agenda Outline Template** layout displays:

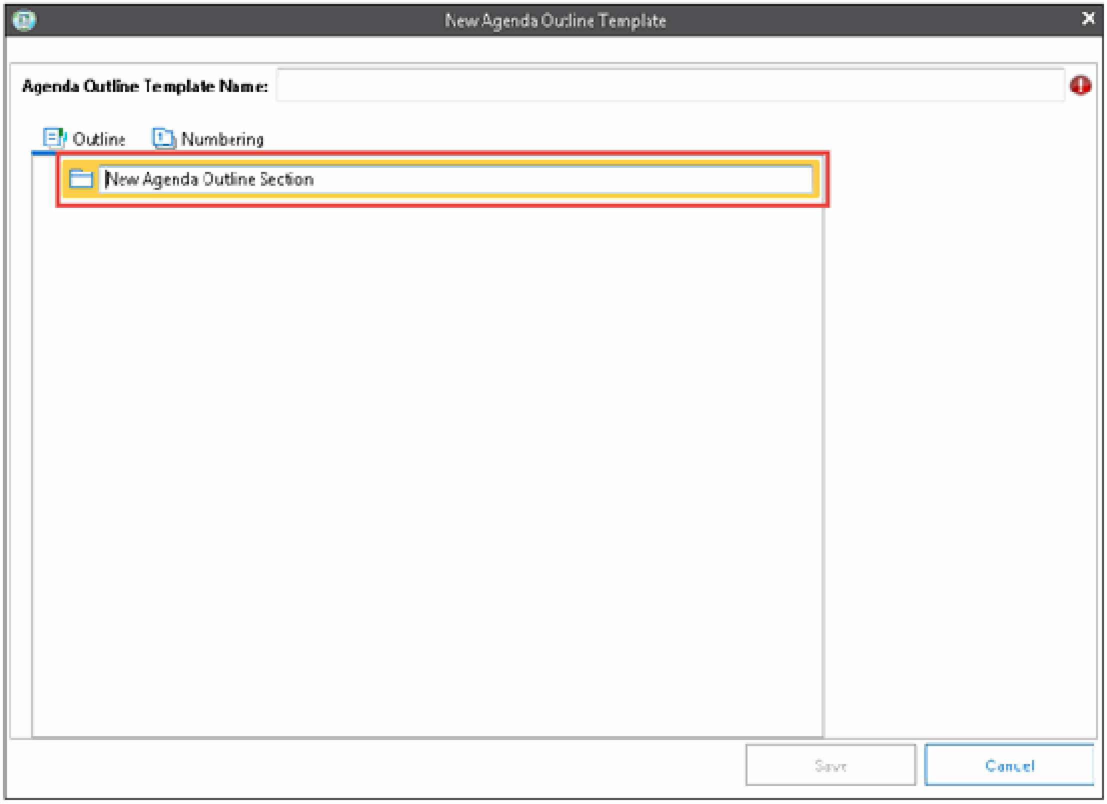


2. On the **Administration** tab, click **New**. The **New Agenda Outline Template** window displays:



3. In **Agenda Outline Template Name**, type a name for the template.

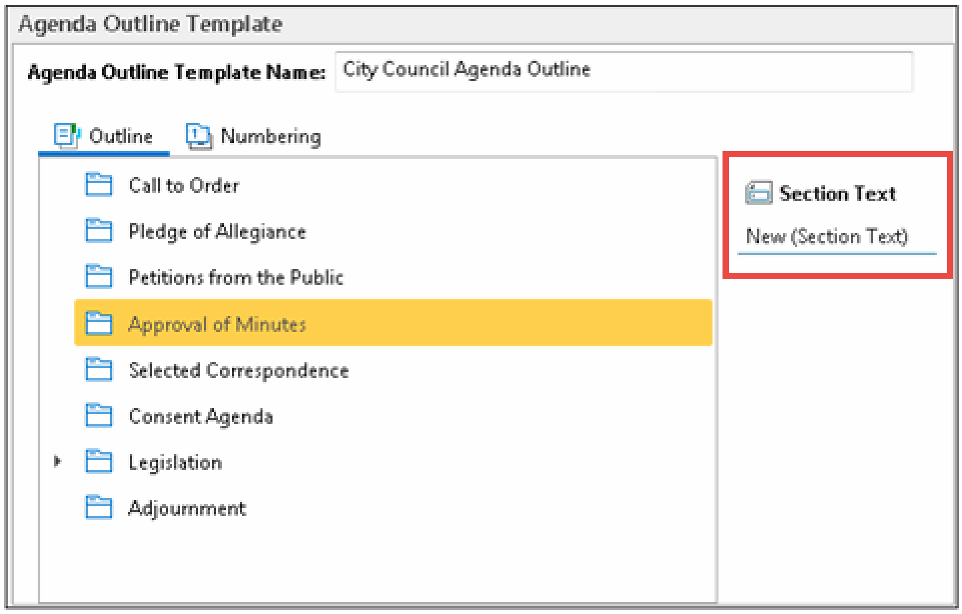
4. To add a new agenda outline section to the agenda outline template, in the **Outline tab**, right-click the left pane, and then select **New Section**. The new agenda outline section displays:



5. The following options are available when right-clicking an agenda outline section:

Option	Description
Edit	Select, or press **F2**, to edit the selected agenda outline section.
Delete	Select, or press the **Delete** key, to delete the selected agenda outline section.
New Sub Section	Select to create a new agenda outline sub-section in the selected agenda outline section.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>New Section Text</td><td>
Select section text that corresponds to the selected agenda outline section. This text is displayed in the right-pane of the New Agenda Outline Template dialog box:

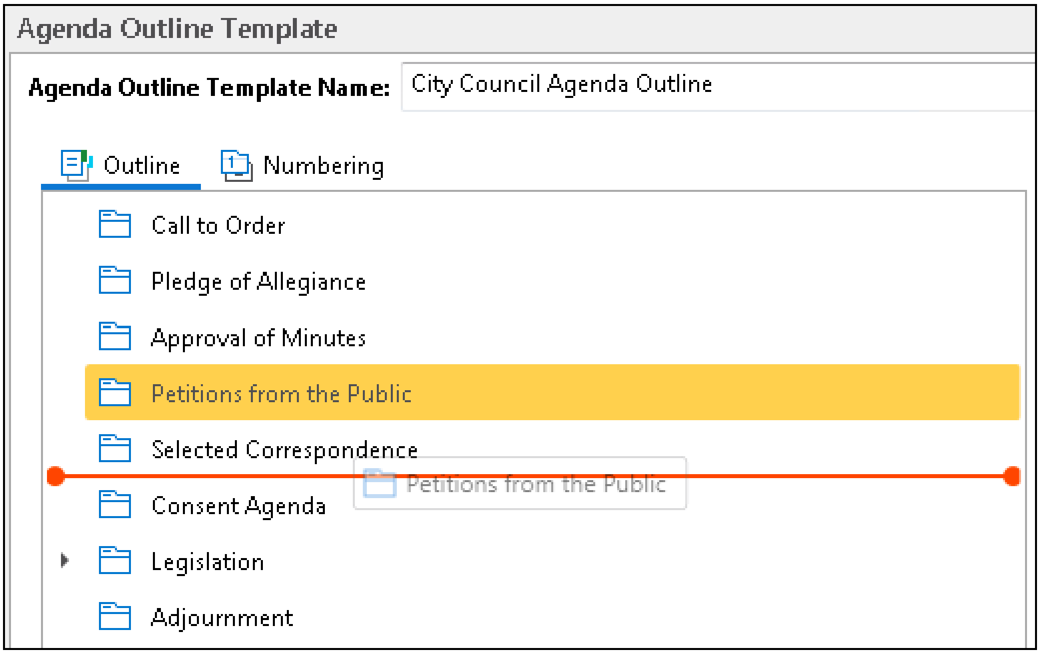


The following right-click options are available when clicking this text:

Edit - Select, or press F2, to edit the selected agenda outline section text. You can also double-click this text to edit.
Delete - Select, or press the Delete key, to delete the selected agenda outline section text.

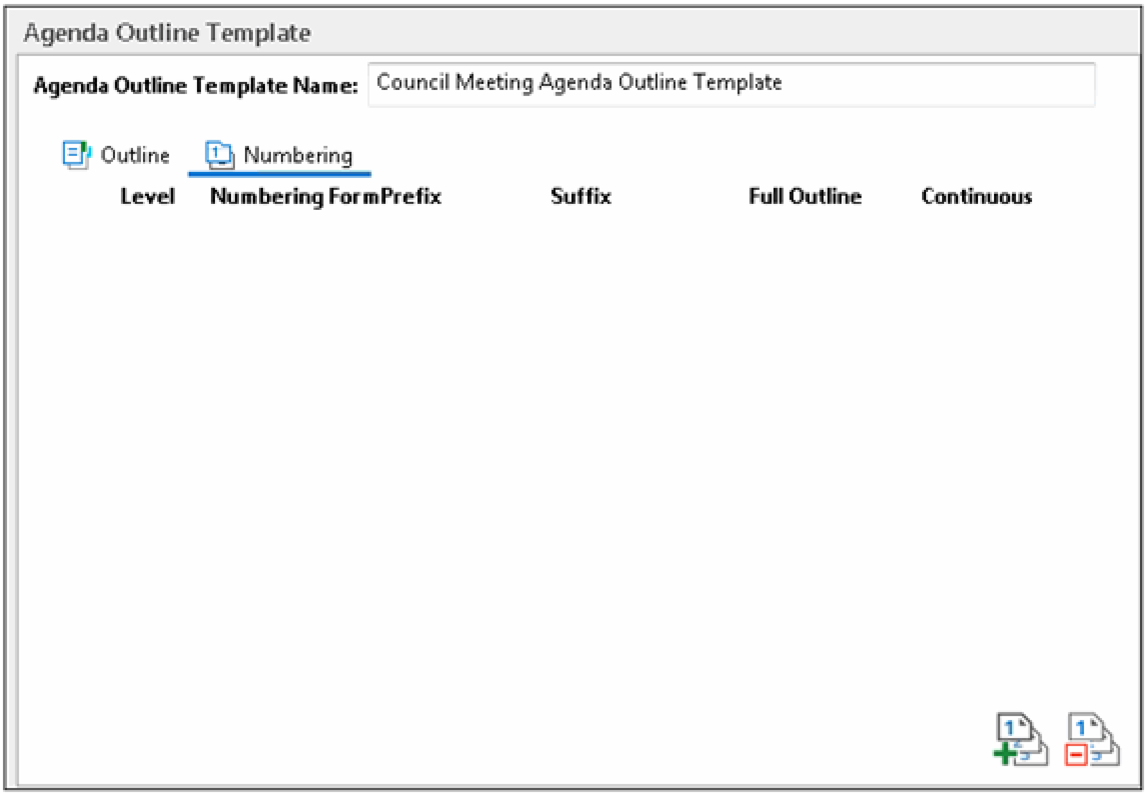
</td></tr>
<tr><td>Hide Section if Empty</td><td>
Select to turn on the toggle to hide the section if it is empty. A check mark is placed next to this option once it is activated. Select this option again to turn off the toggle and display the item whether it is empty or not.
When a Minutes, Agenda or Summary documents is compiled, the sections marked to hide are not displayed if the section does not contain an agenda item.
When using auto-outline numbering, empty sections are not numbered.
</td></tr>
</table>

6. If necessary, reorder agenda sections by selecting a section and moving it to the appropriate location.
   You can also establish a parent-child relationship between agenda sections.
   For example:



7. If you want to set up automatic outline numbering for the template, select the **Numbering** tab. From here you can set up different levels of outline numbering for the agenda items.

Note: In order to use the Numbering feature, you must first enable the **Use Auto Outline Numbering** for the meeting type. See Configuring Meeting Types on page 99 for more information.



8. Click the **Add new numbering format level** icon from the bottom of the screen.

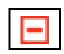
Fields display allowing you to add outline numbering levels.

9. Select the numbering format for the first level from the **Numbering Format** drop-down list.

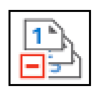
10. Enter values in the **Prefix** or **Suffix** fields if you want to add those items to the numbering format you selected.

Note: Agenda Item field tags are supported in prefixes.

11. Since this is the first level in your outline, the **Full Outline** and **Continuous** options are grayed out. When selected, these options do the following:
    - **Full Outline**: Sets the level to use the full outline number with all the parent numbers pre-pended to the number. This replaces the prefix and removes anything that was configured in the prefix field. The prefix field is also grayed out.
    - **Continuous**: Sets that level to use continuous numbering throughout the outline.
12. Add another level by either selecting the **Add new numbering format level** icon from the bottom of the screen, or by selecting the **Add** icon next to the Level number.
13. Remove formatting using one of two options:
    - Select the **Remove** icon next to a specific format. This removes that format only.

    - Select the **Remove** icon from the bottom of the screen. This removes all formats you have configured for the entire outline.

14. Click **Save**. The new template displays in the **Agenda Outline Template List** pane:
15. To add an agenda section to the template, ensure the template is selected in the **Agenda Outline Template List** pane, and then click **Additional Actions | New Section** or right-click in the **Agenda Outline Template** pane, and then select **New Section**.
16. Repeat steps 4 - 15 to add any additional agenda sections.
17. On the **Administration** tab, click **Save** to save changes to the agenda outline template.

Editing an Agenda Outline Template

To edit an agenda outline template:

1. Select an agenda outline template from the **Agenda Outline Template List** pane.
2. In the **Agenda Outline Template** pane, select an agenda section.
3. The following buttons are available in the **Additional Actions** drop-down list:

Button	Description
	Click **Edit** to edit the selected agenda section in the Edit Agenda Section window. The fields in this dialog box are the same as the fields in the **New Agenda Section** dialog box, described above.

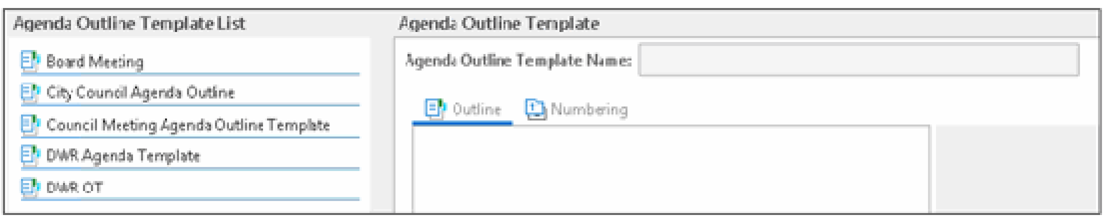
Button	Description
	Click **Delete** to delete the selected agenda section. You can also delete the selected agenda section by clicking **Additional Actions | Delete Section**.

4. If necessary, reorder agenda sections as described in the above section.
5. On the **Administration** tab, click **Save** to save changes to the agenda outline template.

Deleting an Agenda Outline Template

To delete an agenda outline template:

1. On the **Administration** tab, from the **Meeting Type** section, click **Agenda Outline Template**. The **Agenda Outline Template** layout displays:



2. In the **Agenda Outline Template List**, select an agenda outline template.
3. On the **Administration** tab, click **Delete**.
4. You are prompted to confirm that you want to delete the selected agenda outline template.
5. Click **Yes** to delete the template. Click **No** to retain the template.

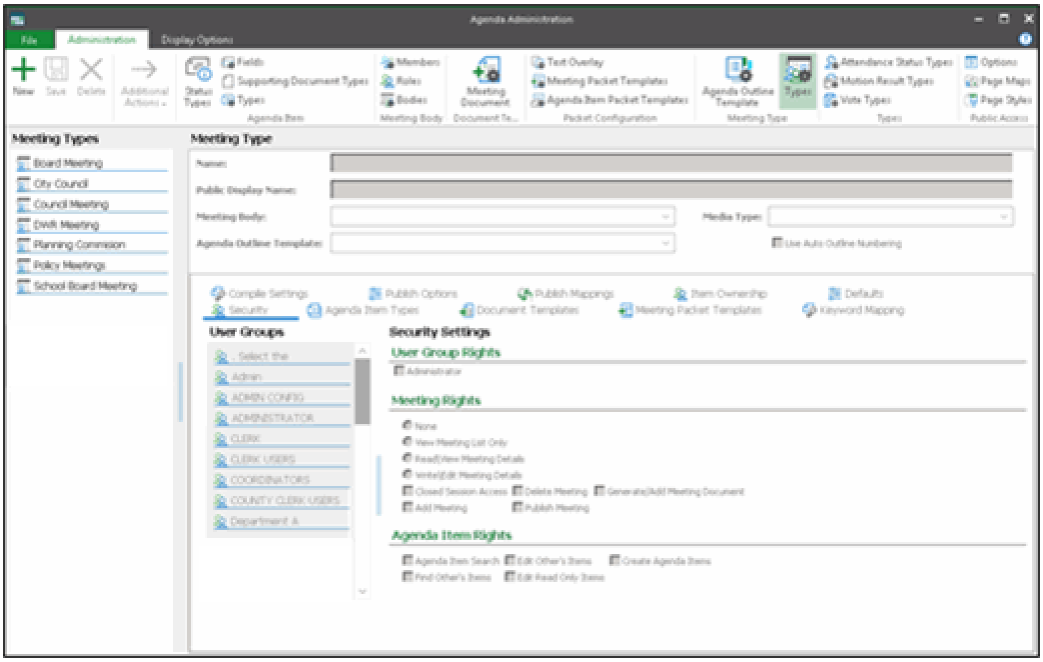
Configuring Meeting Types

A meeting type is the type of meeting held by a meeting body. For example, a meeting body has a monthly board meeting and a weekly status update meeting. Each meeting uses a different agenda outline template and contains different agenda item types. The meeting body should set up one meeting type for each meeting. The configuration of meeting types takes place in the **Agenda Administration** window.

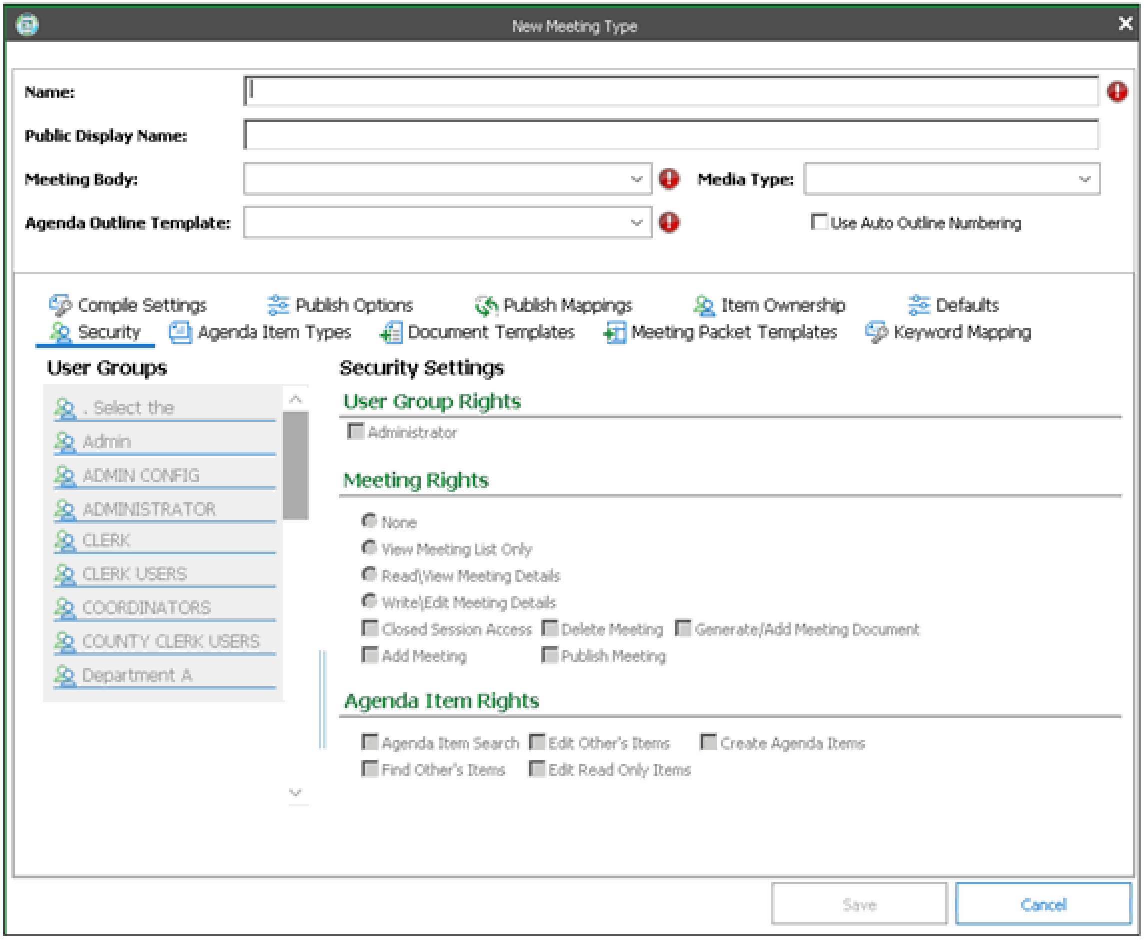
Creating a Meeting Type

To create a meeting type:

1. On the **Administration** tab, from the **Meeting Type** section, click **Types**. The **Meeting Types** layout displays:



2. On the **Administration** tab, click **New**. The **New Meeting Type** dialog box displays:



3. Configure the following:

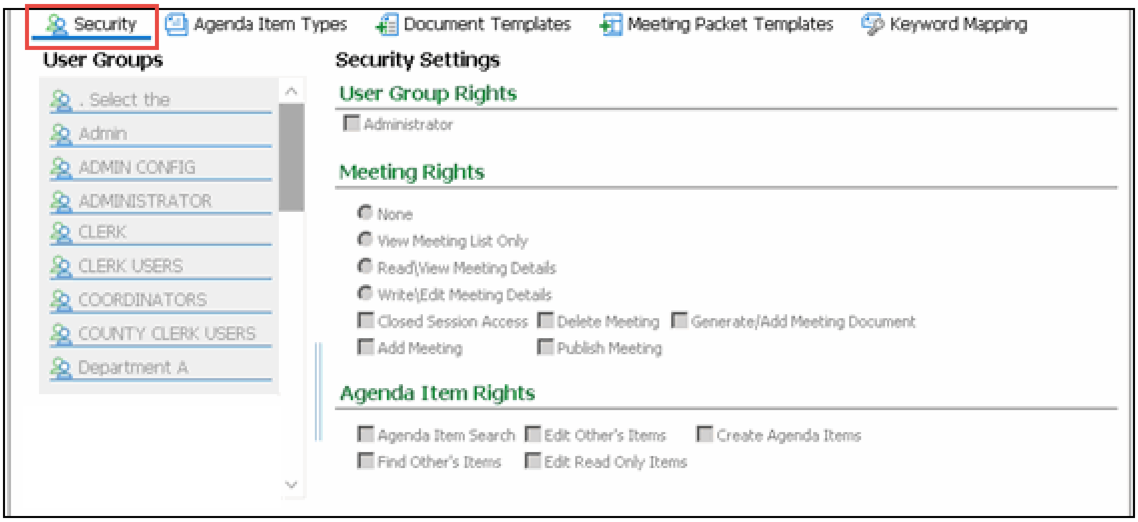
Field	Description
Name	Type a name for the meeting type.
Public Display Name	Type a "friendly" name for the meeting type. This name is displayed in OnBase Agenda Online (see Accessing the Agenda Online Portal on page 310 for more information). This field is limited to 100 characters and is not required.
Meeting Body	Select a meeting body from the drop-down list.
Media Type	Select the media type you want from the drop-down list. If you intend to archive media files, you must select an option from the drop-down list.

Field	Description
Agenda Outline Template	Select an agenda template from the drop-down list with which to associate the meeting type. Associating a meeting type with an agenda outline template is optional. For more information on agenda, see Configuring Agenda Outline on page 92.
Use Auto Outline Numbering	Select this check box to automatically provide outline numbers on the agenda. When you open a meeting in Agenda, the Auto Outline Numbering option is enabled.

Setting Security Options

To set security options for a meeting:

1. Select the **Security** tab.



2. On the **Security** tab, select OnBase user groups from the **User Groups** pane and configure security settings for the meeting type in the **Security Settings** pane. The following security settings are available:

Meeting Rights	Description
Administrator	The selected OnBase user group will have access to all meeting functions in the Agenda view and the Minutes view. They will also have the ability to override items that have been provided with a read-only status. Essentially, the Administrator status provides a user group with super user abilities to perform any and all actions in Agenda.
None	The selected OnBase user group will not have access to the meeting type. The meeting type will be hidden from users.
View Meeting List Only	The selected OnBase user group will have the ability to view meetings belonging to this meeting type in the meeting list, but not view the meeting details.
Read\View Meeting Details	The selected OnBase user group will have the ability to view meetings belonging to this meeting type. User groups must have this option selected for each meeting type that is to be downloaded into Agenda To Go.
Write\Edit Meeting Details	The selected OnBase user group will have the ability to create and edit meetings belonging to this meeting type. This level of access includes the ability to accomplish all of the functionality described in the Usage chapter, with the exception of closed session items.
Closed Session Access	The selected OnBase user group will have access to closed session items that are part of the meeting type. Users with **Write\Edit Meeting Details** access and **Closed Session Access** will be able to mark items as closed session.
Delete Meeting	The selected OnBase user group will have the ability to delete a meeting from the meeting list. If this option is not selected, the Delete icon on the Meeting screen is not active. Users must have **Write\Edit Meeting Details** in order to be able to delete meetings.
Generate/Add Meeting Document	The selected OnBase user group will have the ability to generate and add meeting documents to meetings in the agenda list. If this option is not selected, the Generate Document icon on the Meeting screen is not active. Users must have **Write\Edit Meeting Details** in order to be able to generate and add meeting documents.

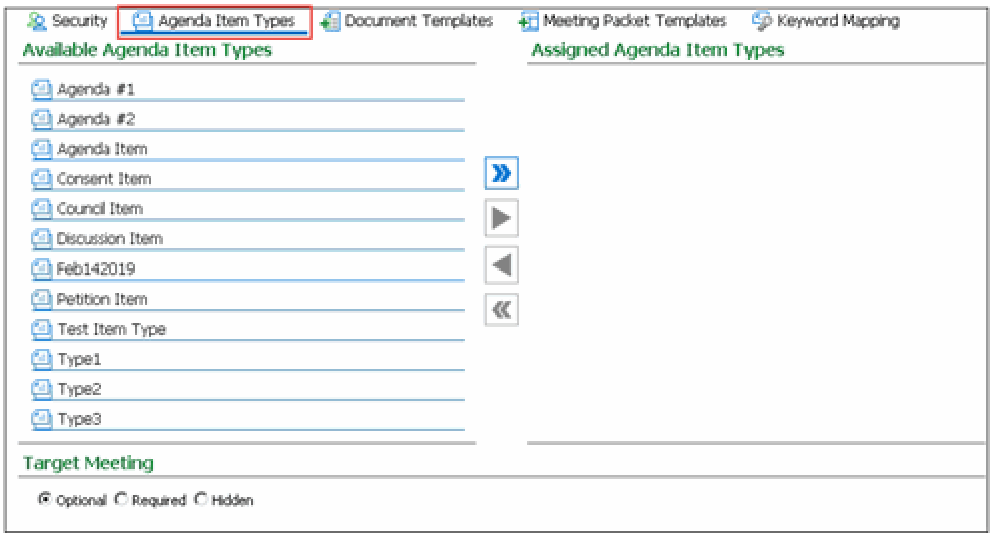
Meeting Rights	Description
Add Meeting	The selected OnBase user group will have the ability to add a meeting to the meeting list. If this option is not selected, the New Meeting icon on the main Agenda screen is not active. Users must have **Write\Edit Meeting Details** in order to be able to add meetings.
Publish Meeting	The selected OnBase user group will have the ability to publish and unpublish meetings and meeting documents for public viewing. If this option is not selected, the **Publish** icon on the Meeting screen is not active. Users must have **Write\Edit Meeting Details** in order to be able to publish/unpublish meetings.

Agenda Item Rights	Description
Agenda Item Search	The selected OnBase user group will have the ability to access the **Agenda Item Search** tab.
Edit Other's Items	The selected OnBase user group will have the ability to edit items created by other users.
Create Agenda Items	The selected OnBase user group will have the ability to create Agenda Items. This privilege also allows users with **View** or **Write\Edit** privileges to edit Agenda Items assigned to a meeting, as long that meeting is due to occur in the future. **Note:** Once an agenda item has been created and associated with a meeting, it can only be deleted by users with the **Write\Edit** privilege.
Find Other's Items	The selected OnBase user group will have the ability to find items created by other users. This option is available only if the **Agenda Item Search** option has been selected.
Edit Read Only Items	The selected OnBase user group will have the ability to edit items that have been set to read-only.

Assign Agenda Item Types to a Meeting

To select Agenda Item Types for a meeting:

1. Select the **Agenda Item Types** tab.



2. On the **Agenda Item Types** tab, select an agenda item type, or multiple agenda item types using the **Ctrl** or **Shift** keys, from the **Available Agenda Item Types** list and click the following button:

   To add all agenda item types, click the following button:

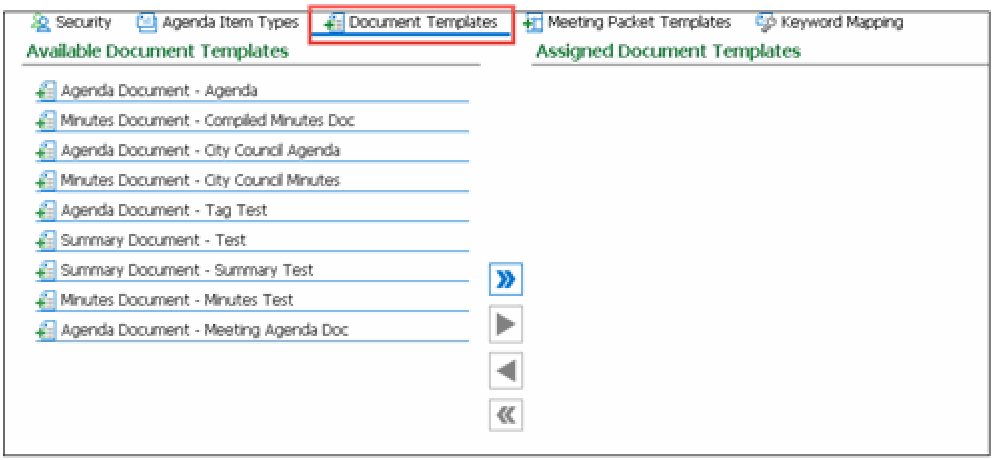
   

   The selected agenda item type(s) are added to the **Assigned Agenda Item Types** list.
3. In the Target Meeting section, select one of the following options:
   - **Optional**. When creating an agenda item, the Target Meeting field is optional.
   - **Required**. When creating an agenda item, the Target Meeting field is required and must have a value set in order for the item to be saved.
   - **Hidden**. When creating an agenda item, the Target Meeting value is not displayed on the Agenda Item form.

Assign Document Templates

To assign a document template to a meeting:

1. Select the **Document Templates** tab.



2. On the **Document Templates** tab, select a document template, or multiple document templates using the **Ctrl** or **Shift** keys, from the **Available Document Templates** list and click the following button:

   To add all document templates, click the following button:

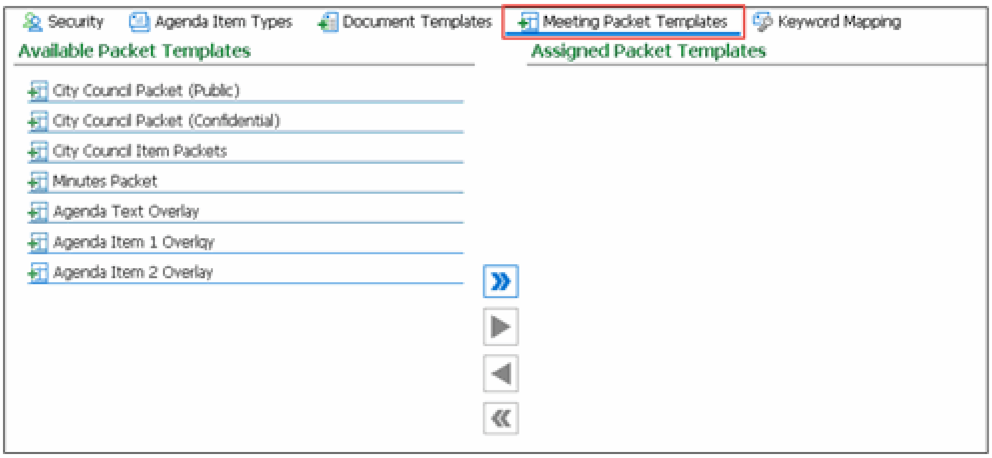
   The selected document templates are added to the **Assigned Document Templates** list.
3. Remove document templates from the **Assigned Document Templates** list by selecting the document you want to remove, and then click the following button:

   To remove all document templates, click the following button:

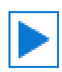
Assign Meeting Packet Templates to a Meeting

To assign Meeting Packet Template to a meeting:

1. Select the **Meeting Packet Templates** tab.

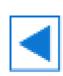


2. On the **Meeting Packet Templates** tab, select a packet template, or multiple packets using the **Ctrl** or **Shift** keys, from the **Available Packet** list and click the following button:



   To add all packets, click the following button:

   The selected packet are added to the **Assigned Packet** list.
3. Remove meeting packet templates from the **Assigned Packet Templates** list by selecting the packet you want to remove, and then click the following button:

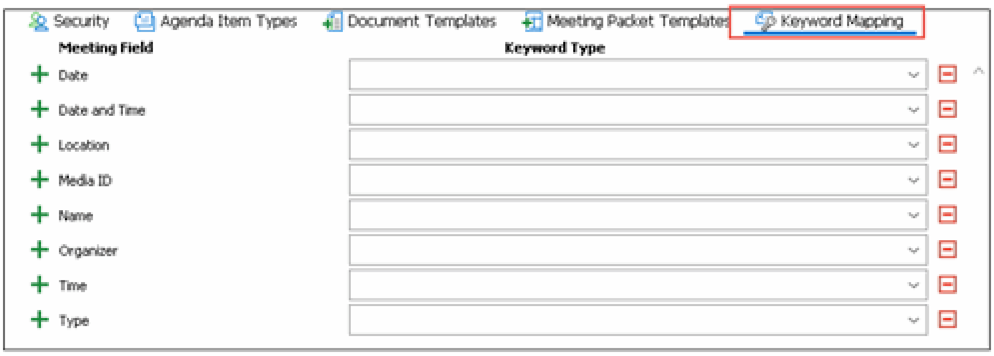


   To remove all packet templates, click the following button:

Set Up Meeting Keywords

To map keywords to meeting:

1. Select the **Keyword Mapping** tab.



2. On the **Keyword Mapping** tab, you can choose to map OnBase Keyword Types to any of the following meeting type fields:

Meeting Type Field	Description
Date	The meeting date.
Date and Time	The meeting date and time.
Location	The meeting location.
Media ID	This allows the user to map the Media ID coming from Minutes or Media Publisher to a specific keyword for storage in the local or GCS database.
Name	The meeting name.
Organizer	The meeting organizer.
Time	The meeting time.
Type	The meeting type.

Select the Keyword Type that will be used to store the meeting type field from the corresponding drop-down list. The following buttons are available:

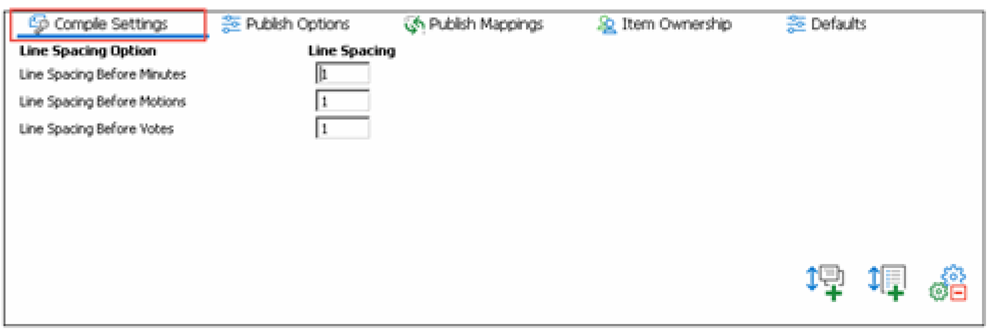
Button	Description
	Click to add an additional instance of the corresponding meeting type field.

Button	Description
	Click to remove the configured keyword mapping.
	Click to remove all configured keyword mappings.

Determine Compile Settings for a Meeting

To determine how a meeting is compiled:

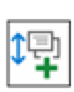
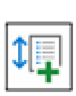
1. Select the **Compile Settings** tab.

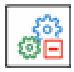


2. On the **Compile Settings** tab, you can choose how much line spacing you want between a compiled document and other elements of a meeting template. Line spacing options include:
   - Line spacing before Minutes
   - Line spacing before Motions
   - Line spacing before Votes

   Enter the number of spaces you want in the text box next to each element.

   You can also select an icon from the bottom right of the screen to add spacing before children and siblings in a tree:

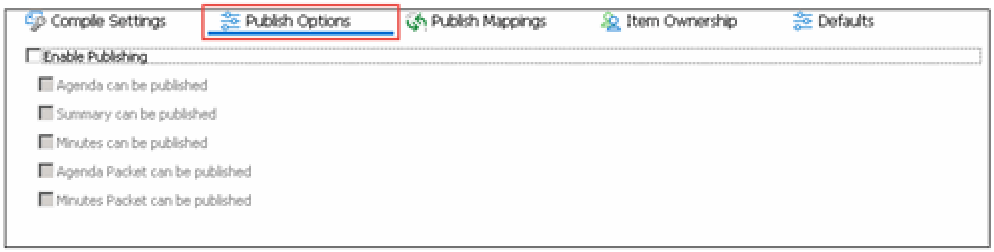
Option	Description
	Click this icon to add spacing before **children** objects in a tree. Select a tree level from Tree Level drop-down list.
	Click this icon to add spacing before **sibling** objects in a tree. Select a tree level from the Tree Level drop-down list.

Option	Description
	Click this icon to remove any compile options that were added or modified in this tab.

Choosing Publish Options

The **Publish Options** tab allows you to control which meeting items for this meeting type can be viewed by the public in the Agenda Online tool. To choose the documents that can be published for a meeting:

1. Select the **Publish Options** tab.



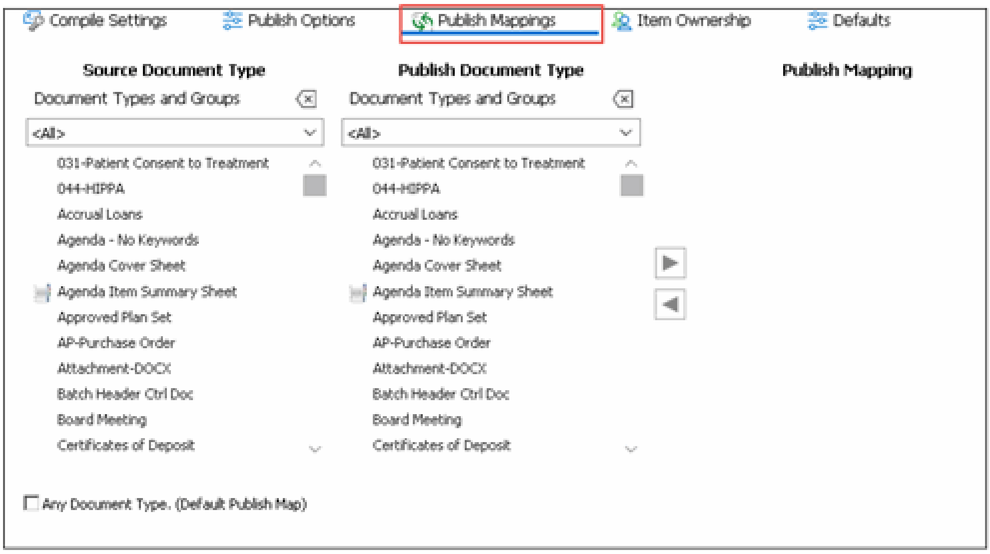
2. Click **Enable Publishing** to activate the meeting items.
3. Select from the following meeting items to allow them to be published:
   - Agenda
   - Summary
   - Minutes
   - Agenda Packet
   - Minutes Packet
4. If you do not want an item to be published, de-select **Enable Publishing**. When **Enable Publishing** is not selected, the **Publish** button on Agenda does not activate when you select a meeting document.

Determine Publish Mapping Options

The **Publish Mappings** tab allows you to map source OnBase document types to publish OnBase document types. This allows the clerk to control which document types are available for full-text cataloging and public searching.

To map source documents to publish documents:

1. Select the **Publish Mappings** tab.



2. In the **Source Document Type** panel, select a document type or group from the drop-down list. You can use the default of All, but if you want to narrow your search, you may want to select a specific group or document type.
3. Select the document type you want to use as your source from the list.

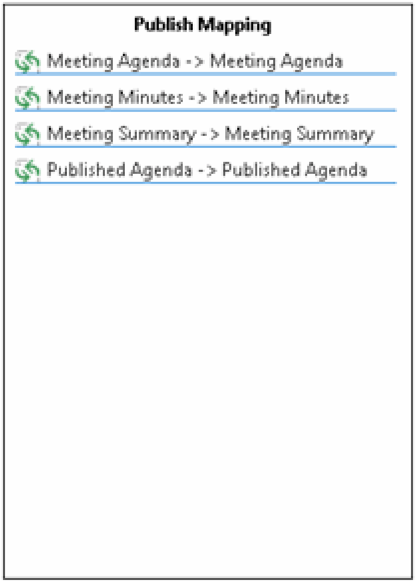
Note: If you want to add a default publish mapping as your source, select the **Any Document Type** check box. Essentially, if a source/publish mapping does not exist for a current document, then default mapping is used. This displays as Any Document type (Default) in the Publish Mapping panel. Once you have used this option, it is disabled and may not be used again for this meeting type.

4. In the **Publish Document Type** panel, select a document type or group from the drop-down list. You can use the default of All, but if you want to narrow your search, you may want to select a specific group or document type.
5. Select the document type you want to use as your published document type from the list.

6. Click the **Add Publish Mapping** icon to add the mapping to the **Publish Mapping** panel.

Note: This icon is not enabled until you have selected both a source document type and a publish document type from the lists.

The mapped documents display in the Publish Mapping panel in alphabetical order.



7. If you need to remove a document mapping, select the mapped documents you want to remove from the **Publish Mapping** panel, and then click the **Remove Publish Mapping** icon.

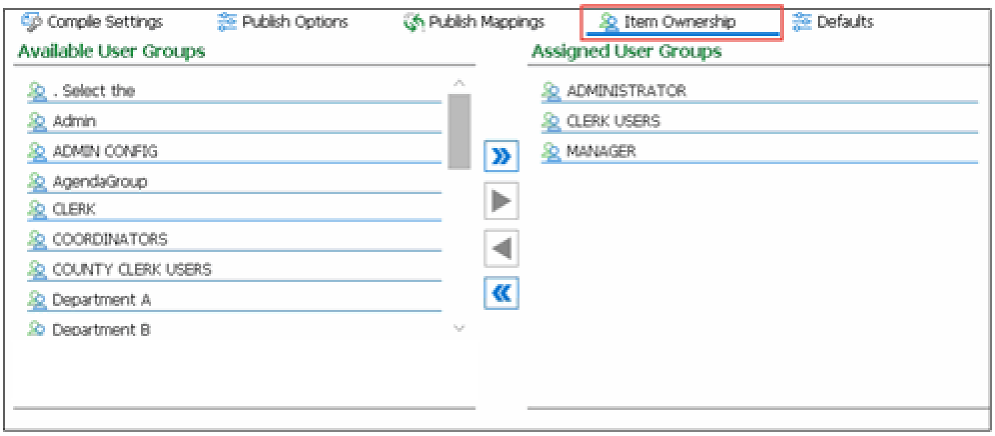
The mapping is removed and the document types are placed into their respective panels.

Setting Item Ownership Agenda Items

The Item Ownership tab provides the ability to allow and prevent user groups from updating agenda items. This means that if you are not in a User Group that has been assigned to the Agenda Item, you may not view, edit or modify the agenda items created for this meeting.

To determine who has ownership of agenda items:

1. Select the **Item Ownership** tab.



2. Select user groups to which you want to provide item ownership from the **Available User Groups** pane, and then click the following button:

To add all user groups, click the following button:

3. The selected User Groups are added to the **Assigned User Groups** pane.

Note: If an agenda item is copied from another meeting that does not have a user group assigned to it, the copied item comes over to the new meeting with an ownership status of "unassigned."

Setting Default Items

The Defaults tab provides the ability to set default values for meetings when a new meeting is created.

To set default values for new meetings:

1. Select the **Defaults** tab.

2. In the fields provided, enter the values you want to set as the default values each time a meeting is created for the meeting type.

Note: When all changes are made, click **Save** from the main Administration screen.

Editing a Meeting Type

To edit a meeting type from the **Meeting Types** layout:

1. In the **Meeting Types** pane, select an existing meeting type.
2. In the **Meeting Type** pane, edit the fields described in Creating a Meeting Type on page 100 as necessary.
3. On the **Administration** tab, click **Save** to save changes.

Deleting a Meeting Type

Note: Meeting types can only be deleted if no meeting instances have been defined, or if meeting instances do not have any related agenda items or minutes information.

To delete a meeting type from the **Meeting Types** layout:

1. In the **Meeting Types** pane, select an existing meeting type.
2. On the **Administration** tab, click **Delete**.
3. You are prompted to confirm that you want to delete the meeting type.
4. Click **Yes** to delete the meeting type. Click **No** to cancel deletion.

Configuring Agenda Document Templates

When generating an agenda document, minutes document or summary document, users can select a pre-configured template to use. Each document template is used for the following purposes:

- **Agenda Document**: lists the items in the agenda prior to the meeting.
- **Minutes Document**: lists the items in the agenda after a meeting has taken place, including the minutes and actions.

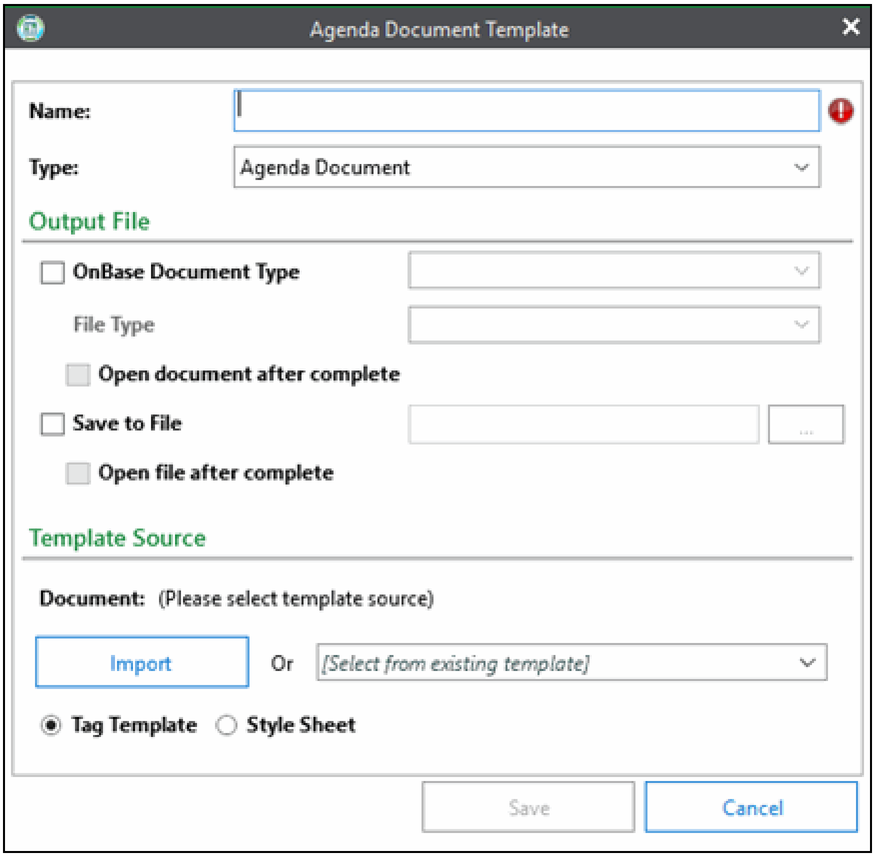
- **Summary Document**: lists the items in the agenda after a meeting has taken place, including roll call, motions and votes, but does not contain any minutes that were taken during the meeting.

Once a document template has been created, it must be assigned to the meeting. See Configuring Meeting Types on page 99 for more information.

Creating a Meeting Document Template

To create an agenda document, minutes document or summary document template:

1. On the **Administration** tab, from the **Document** section, select **Meeting Document**. The **Agenda Document Template** layout is displayed.
2. On the **Administration** tab, click **New**. The **Agenda Document Template** dialog box is displayed.



3. In the **Name** field, enter a name for the agenda document template.
4. In the **Type** field, select **Minutes Document** to create a Minutes template, **Agenda Document** to create an Agenda Document template or **Summary Document** to create and Agenda Summary template.

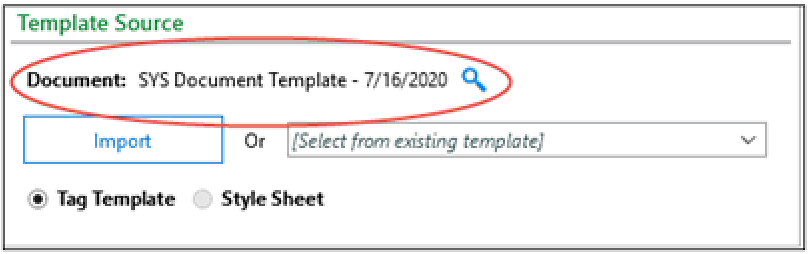
5. In the **Output File** section specify the following:

Output File	Description
OnBase Document Type	To save the packet to OnBase, select this check box and select the OnBase Document Type where the generated packet should be stored.
File Type	Select the file format. **Note:** If only one file type is displayed in the **File Type** field, you must double-click the option to enable it. When using a Microsoft Word file format, it is considered a best practice to ensure the file format is using the extension **.docx**. When using a Microsoft Word file format with a different extension (e.g., **.doc**), unexpected behavior may occur when attempting to open the document in certain environments. Only the Microsoft Word file format (open XML format) is supported. **Note:** If the **OnBase Document Type** option is selected, **File Type** is a required field.
Open document after complete	Select to open the meeting packet after generation.
Save to File	To save the packet to an external location, select this check box and specify a location to save the file. You can also click **...** to browse to a location.
Open file after complete	Select to open the meeting packet after generation.

6. In the **Template Source** section, do one of the following to add a document:
   - Select **Import** to import a local document into OnBase.
   - If a document template already exists, a drop-down list is displayed, allowing you to select an existing document from another template.

Note: If only one template is displayed when choosing from an existing template, you must double-click the template to add it as the template source.

The document is listed in the Document field. Click the **View** icon to view the document in OnBase.



7. Select one of the following to further classify the template source:
   - **Tag Template**. Select to use a pre-existing tag template to create the generated document. For access to the most functionality available in Agenda, it is recommended that you use the tag template.

Note: Tags can be created in Microsoft Word using the tags provided in Agenda Tag Templates on page 159. To obtain default tags, contact your first line of support.

   - **Style Sheet**. Select to use a pre-existing **.xslt** style sheet to create the generated document.

Note: Style sheets are primarily used by legacy customers that already have custom style sheets for Agenda and Minutes documents. They can also be used for creating custom meeting data output in XML, HTML, or Text formats. Style sheets are not available for Summary documents and they are not compatible with publishing to Agenda Online. For Agenda Online, the tag template is the recommended meeting document template source option.

8. Click **Save**.

Editing an Agenda Document Template

To edit an agenda document template:

1. Select an agenda document template from the **Agenda Document Templates** pane.
2. The agenda document template's settings are displayed in the **Agenda Document Template** pane.
3. Edit settings in the **Name** and **Type** fields, and in the **Output File** section as necessary.

4. To modify the existing **Template Source**, do one of the following:
   - Click **Import** to import a local file into OnBase to be used as the template source.
   - If document templates already exist in the system, select it from the **Select from existing template** drop-down list.
   - Click **Find** to select a document that already exists in OnBase.

   Note the following:
   - If the template was created **without** an OnBase document assigned to it, the template **Type** and document **Path** is displayed. The **Document** field displays as **None**, indicating that an OnBase document was not assigned to this template.
   - If the template was created **with** an OnBase document assigned to it, the **Document** field displays the document name as listed in OnBase, along with the template **Type**. You can click the **View** icon to view the document in the document **Viewer**.
5. Click **Save**.

For more information on Agenda Document Template settings, see Creating a Meeting Document Template on page 115.

Deleting an Agenda Document Template

To delete an agenda document template:

1. Select an agenda document template from the **Agenda Document Templates** pane.
2. Click **Delete**.
3. Click **Yes** to delete the agenda document template. Click **No** to cancel deletion.

Note: You cannot delete an agenda document template that is assigned to a meeting type.

Configuring Packets

A packet template is used to generate Agenda and Minutes Packets. Agenda packets contain the agenda and all supporting documents for each agenda item in one PDF file. A Minutes Packet contains the Minutes document along with the Minutes Supporting Document. Whenever an attachment is added or removed in OnBase Minutes, the change is reflected in the Minutes Packet.

The configuration of packet takes place on the **Administration** tab, and includes creating and configuring text overlays.

Note: Agenda Item Packets are available in the Agenda View Only. You cannot create an Agenda Item Packet in the Minutes view. See Viewing Meetings in Agenda or Minutes View on page 277 for more information regarding Agenda and Minutes views.

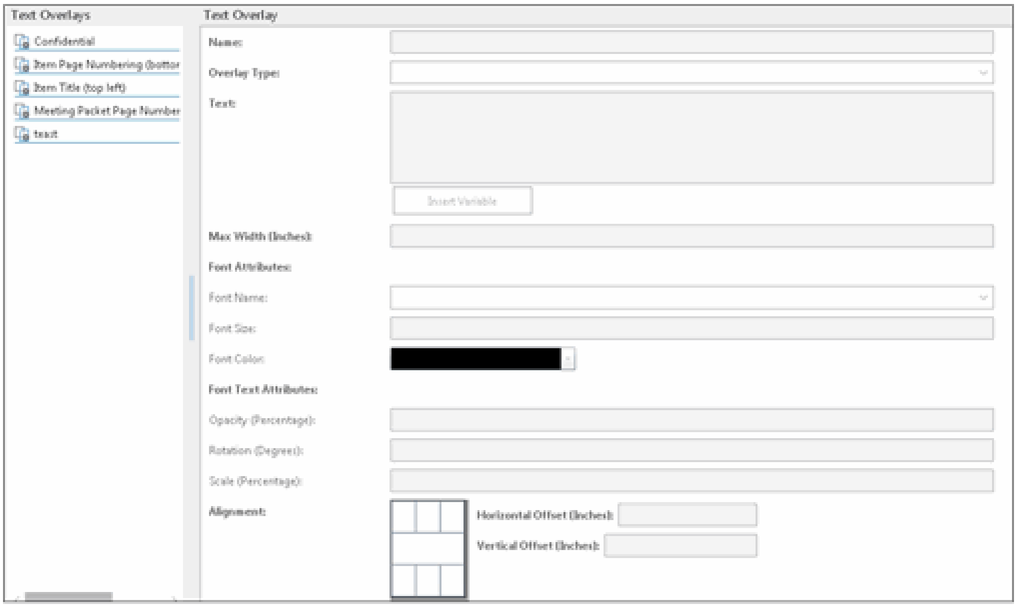
Configuring Text Overlays

When a packet is generated, users can select one or more text overlays to apply to the packet.

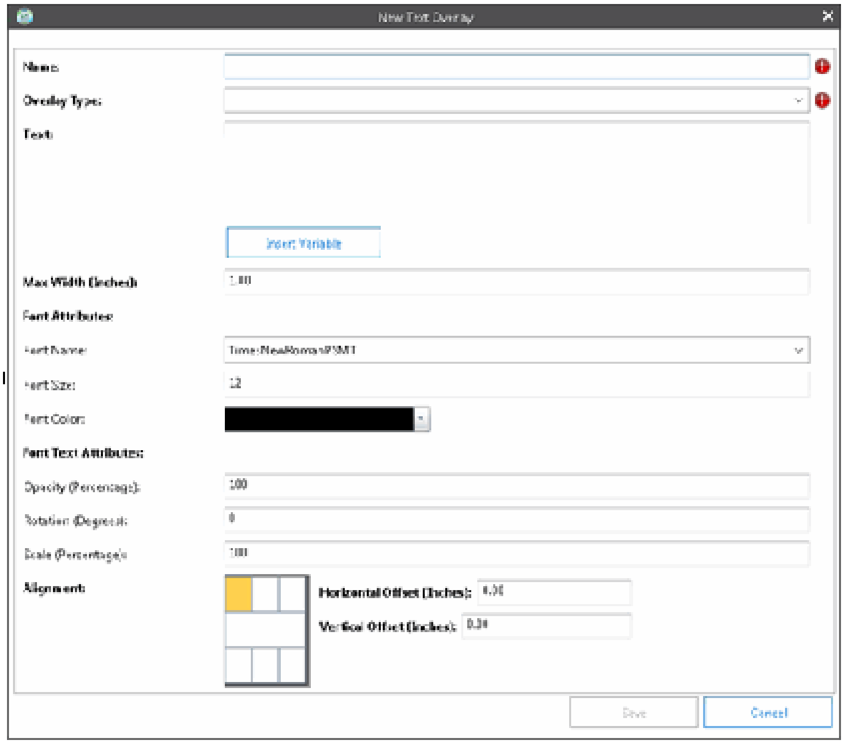
Creating a Text Overlay

To create a text overlay:

1. On the **Administration** tab, from the **Packet Configuration** section, select **Text Overlay**. The **Text Overlays** layout displays:



2. On the **Administration** tab, click **New**. The **New Text Overlay** dialog box displays:



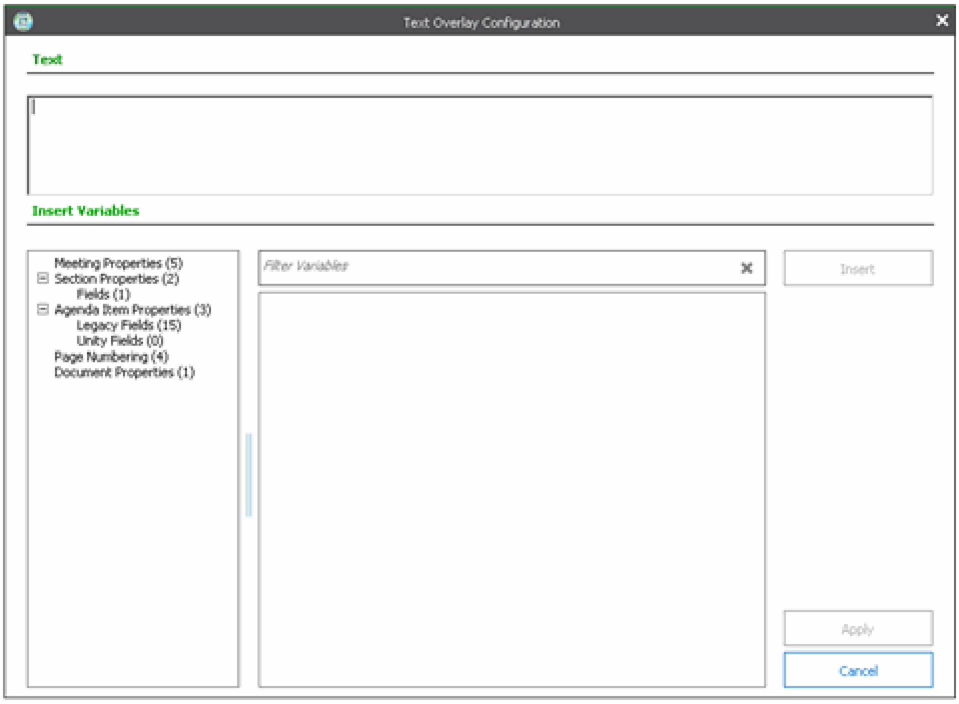
3. In **Name**, type a name for the text overlay.
4. From the **Overlay Type** drop-down list, select one of the following:

Overlay Type	Description
Closed-session agenda item placeholder	The overlay is for a closed-session agenda item placeholder. When generating the packet, these overlays are included on a blank page. **Note:** You cannot use **Agenda Item Properties** when the **Overlay Type** is set to **Closed-session section placeholder**.
Closed-session section placeholder	The overlay is for a closed-session agenda section placeholder. When generating the packet, these overlays are included on a blank page.
Excluded agenda item supporting document placeholder	The overlay is for an excluded agenda item supporting document placeholder.

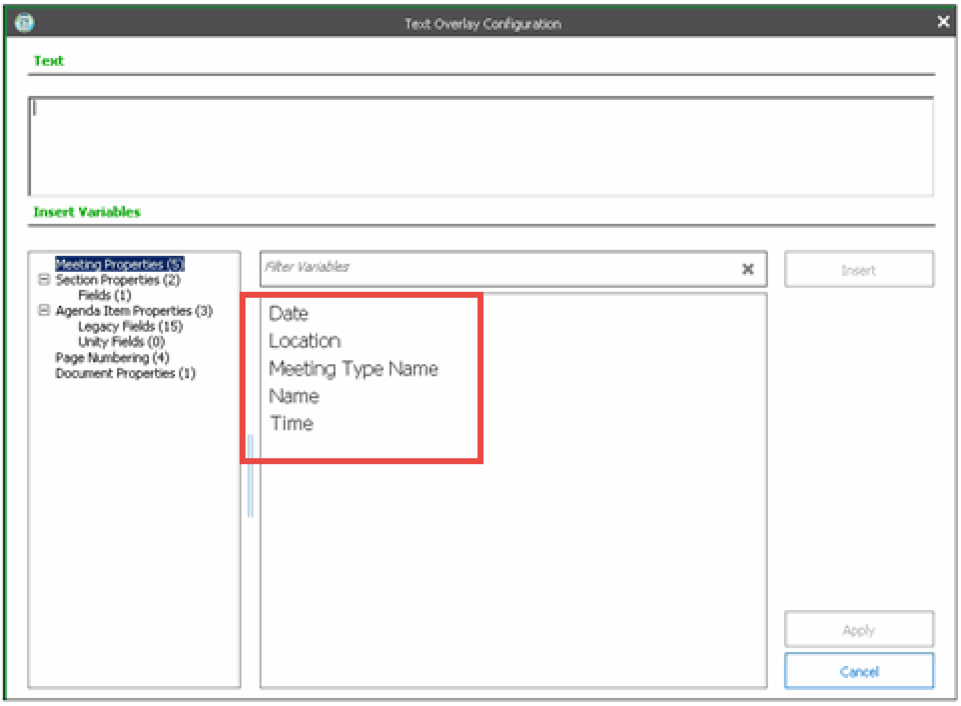
Overlay Type	Description
Meeting packet - Running page overlay	This overlay is applied to all pages within a meeting packet. If you want a running overlay to start on a specific page, use the Supporting document - Running page overlay option.
Supporting document - Running page overlay	This overlay is applied to all the pages of an agenda item's supporting documents that are included in a packet. Agenda item specific variables can be used in this type of overlay. **Item Page Number** and **Item Total Pages** page counts that are used in this type of overlay are specific to an agenda item, while **Running Page Number** page counts apply to the entire packet.
Agenda document - Running page overlay	This overlay is applied to all the pages of the agenda document within a packet.
Supporting Document - First Page Only	This overlay is applied to all the pages of the entire packet. Page counts that are used in this type of overlay are relative to the entire packet. Agenda Item level variables can not be used in this type of text overlay.
Supporting Document - Last Page Only	This overlay is applied to the first/last page of an agenda item's supporting documents that are included in a packet. Agenda item specific variables can be used in this type of overlay.

5. In **Text**, type text for the overlay. Variable text is also available. When the packet is generated, all variables are replaced with data.

6. Click **Insert Variable**. The Text Overlay Configuration screen is displayed.

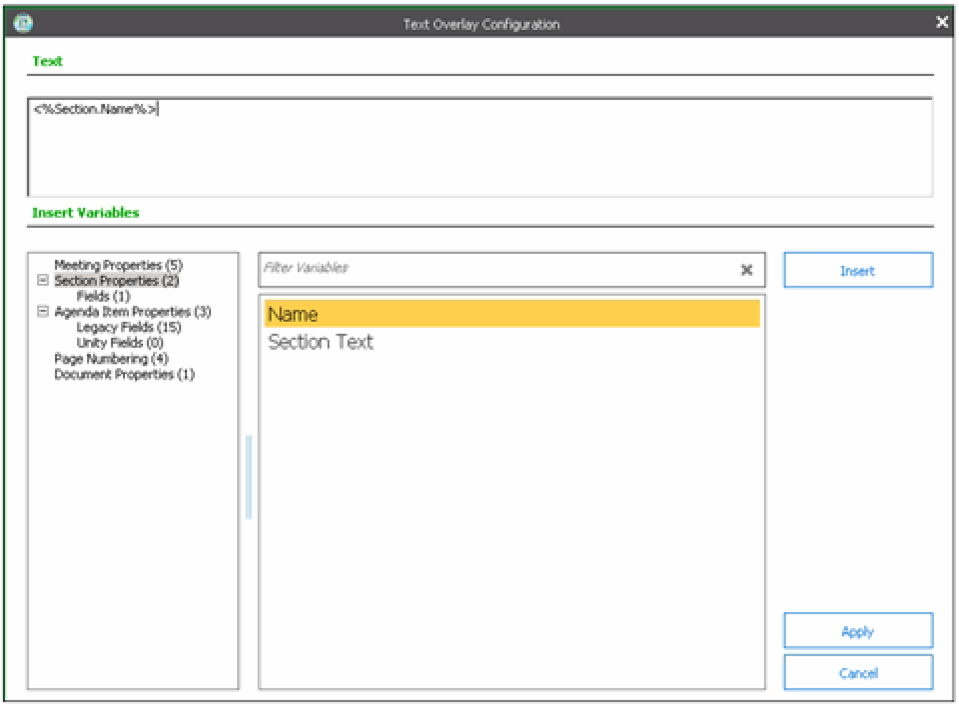


7. Select a variable from the Variables pane. The configuration options are displayed.



Note: The number of configuration options available for a particular variable is displayed in ( ) after the variable name.

8. Double-click a configuration option to move it to the **Text** box.



9. Click **Apply**. The Text Overlay Configuration window is closed.

The following tables list the options available for each variable.

Meeting Properties	Description
Name	Inserts the meeting name variable: <%Meeting.Name%>.
Date	Inserts the meeting date variable: <%Meeting.Date%>.
Time	Inserts the meeting time variable: <%Meeting.Time%>.
Location	Inserts the meeting location variable: <%Meeting.Location%>.
Meeting Type Name	Inserts the meeting type name variable: <%Meeting.TypeName%>.

Section Properties	Description
Name	Inserts the agenda section name variable: <%Section.Name%>.
Section Text	Inserts the agenda section text variable: <%Section.Text%>.

Section Properties	Description
Fields	Inserts a selected agenda section field variable: <%Section.FieldValue([numeric ID of the field type])%>. **Note:** If multiple fields on the agenda section have the same field type, the first field returned from the database is used.

Agenda Item Properties	Description
Short Item Title	Inserts the short item title for the agenda item variable: <%AgendaItem.ShortItemTitle%>.
Agenda Item Type Name	Inserts the agenda item type name variable: <%AgendaItem.TypeName%>.
Agenda Item Number	Inserts the agenda item number variable: <%AgendaItem.AgendaItemNumber%>
Fields	Inserts a selected agenda item field variable: <%AgendaItem.FieldValue([numeric ID of the field type])%>. You can choose from either Legacy fields or Unity fields. If one type of field has not been configured, the field type is displayed with a (0) next to it. **Note:** If multiple fields on the agenda item have the same field type, the first field returned from the database is used.

Note: Agenda Item Properties are not applicable when the **Overlay Type** is set to **Closed-session section placeholder** or **Agenda packet - Running page overlay**.

Date Document Generated	Description
Date Document Generated	Inserts the date the document was generated variable: <%DateDocumentGenerated%>.

Page Numbering	Description
Running Page Number	Inserts the running page number relative to all the pages in the entire packet document: <%PageNumber.RunningPageNumber%>.

Page Numbering	Description
Item Page Number	Inserts the item page number relative to all the pages from an agenda item's supporting documents: <%PageNumber.ItemPageNumber%>. **Note:** This option is not applicable when the **Overlay Type** is set to **Closed-session section placeholder** or **Agenda packet - Running page overlay**.
Item Total Pages	Inserts the total number of pages from an agenda item's supporting documents: <%PageNumber.ItemTotalPages%>. **Note:** This option is not applicable when the **Overlay Type** is set to **Closed-session section placeholder** or **Agenda packet - Running page overlay**.
Packet Total Pages	Inserts the total number of pages in the agenda item packet: <%PageNumber.PacketTotalPages%>.

Note: The options described in this step are also available when clicking the **Insert Variable** button.

10. In **Max Width**, type the maximum width of the text overlay. 0 indicates an unlimited width.
11. In **Font Attributes**, specify the following:

Font Attributes	Description
Font Name	The name of the font.
Font Size	The point size of the font.
Font Color	Select the color of the font from this drop-down list.

12. In **Font Text Attributes**, specify the following:

Font Text Attributes	Description
Opacity (Percentage)	The opacity of the font text, as a percentage.
Rotation (Degrees)	The rotation of the font text, in degrees.
Scale (Percentage)	The scale of the font text, as a percentage.

13. In **Alignment**, select one of the following areas for the overlay's anchor point:

Alignment	Description
Top Left	The anchor point will be in the top left corner of the page.
Top Center	The anchor point will be centered at the top of the page.
Top Right	The anchor point will be in the top right corner of the page.
Center	The anchor point will be in the center of the page.
Bottom Left	The anchor point will be in the bottom left corner of the page.
Bottom Center	The anchor point will be centered at the bottom of the page.
Bottom Right	The anchor point will be in the bottom right corner of the page.

14. In **Horizontal Offset (Inches)**, specify how far from the horizontal axis from the default position that the overlay will appear.

Note: You can enter values between 999.99 and -999.99.

15. In **Vertical Offset (Inches)**, specify how far from the vertical axis from the default position that the overlay will appear.

Note: You can enter values between 999.99 and -999.99.

16. Click **Save**. The text overlay you created is displayed in the **Text Overlays** pane.

Editing a Text Overlay

To edit a text overlay:

1. Select a text overlay from the **Text Overlays** pane.
2. The text overlay's settings are displayed in the **Text Overlay** pane.
3. Edit settings as necessary and click **Save**.

For more information on text overlay settings, see Creating a Text Overlay on page 119.

Deleting a Text Overlay

To delete a text overlay:

1. Select a text overlay from the **Text Overlays** pane.
2. Click **Delete**.
3. Click **Yes** to delete the text overlay. Click **No** to cancel deletion.

Note: You cannot delete a text overlay that is assigned to a packet.

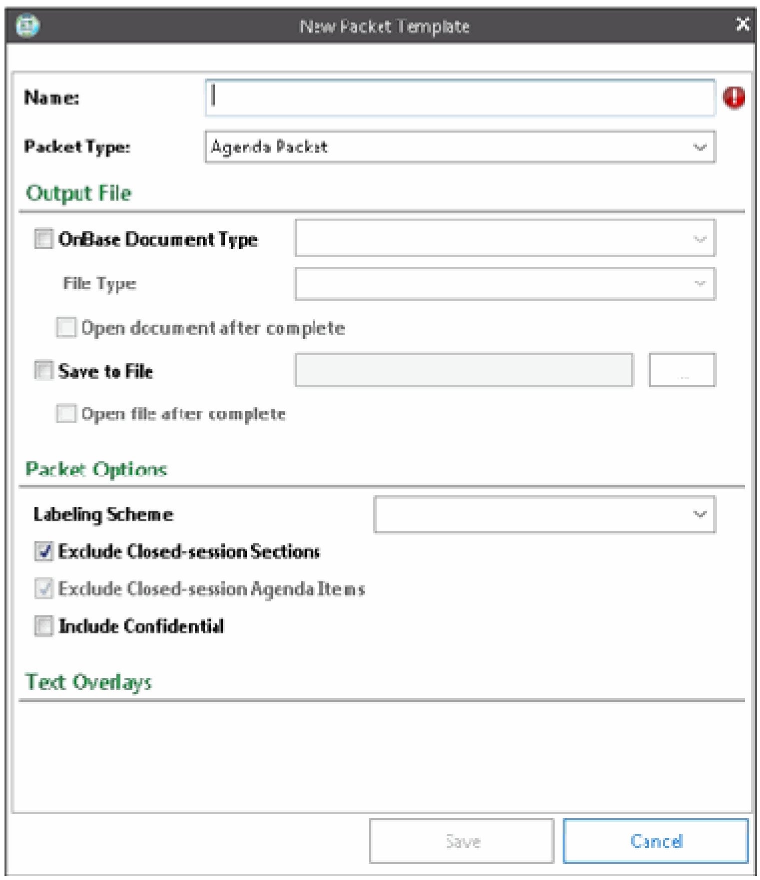
Configuring Meeting Packets

You can create either an Agenda Packet or a Minutes Packet template.

Creating a Meeting Packet Template

To create a meeting packet template:

1. On the **Administration** tab, from the **Packet Configuration** section, select **Meeting Packet Templates**. The **Meeting Packet Template l**ayout is displayed.
2. On the **Administration** tab, click **New**. The **New Packet Template** dialog box is displayed:



3. In **Name**, type a name for the packet template.
4. From the Packet Type drop-down list, select whether this is to be an Agenda Packet or a Minutes Packet.

5. In **Output File**, specify the following:

Output File	Description
OnBase Document Type	To save the packet to OnBase, select this check box and select the OnBase Document Type where the generated packet should be stored.
File Type	Select the file format. **Note:** When using a Microsoft Word file format, it is considered a best practice to ensure the file format is using the extension **.docx**. When using a Microsoft Word file format with a different extension (e.g., **.doc**), unexpected behavior may occur when attempting to open the document in certain environments. **Note:** If the **OnBase Document Type** option is selected, **File Type** is a required field.
Open document after complete	Select to open the packet after generation.
Save to File	To save the packet to an external location, select this check box and specify a location to save the file. You can also click **...** to browse to a location.
Open file after complete	Select to open the packet after generation.

6. In **Packet Options**, from the **Labeling Scheme** drop-down list, select one of the following to determine how the packet bookmarks will be labeled:

Labeling Scheme	Description
Agenda Item Title	The packet bookmarks are labeled using the Agenda Item Title.
Agenda Item Number	The packet bookmarks are labeled using item numbers. For example, 1, 2, 3, etc.
Agenda Item Number And Title	The packet bookmarks are labeled using numbers and the Agenda Item Title.

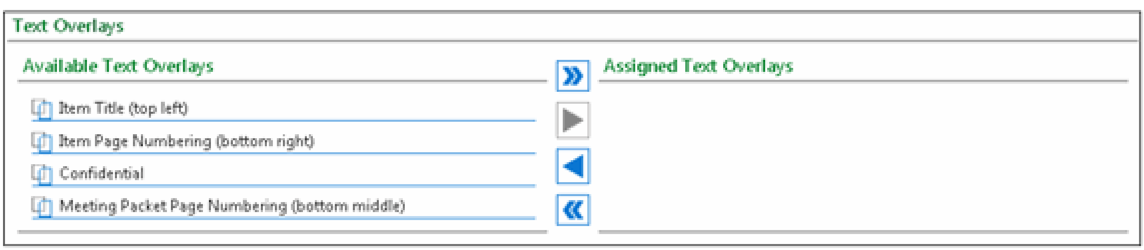
7. Select either of the following check boxes:

Packet Options	Description
Exclude Closed-session Sections	Select to exclude closed-session agenda sections from the packet. If this option is selected, the Exclude Closed-Session Agenda Items is automatically selected.
Exclude Closed-session Agenda Items	Select to exclude closed-session agenda items from the packet.
Include Confidential	Select to include confidential files in a meeting packet. If they are not to be included in the packet, leave the check box unchecked.

8. Click **Save**.

Note: The **Save** button is only enabled once a value has been entered for all available options.

9. The packet template you created is displayed in the **Meeting Packet Template** pane.
10. After creating a packet template, you can assign text overlays to the template in the **Packet Template** pane:



When a packet is generated, users can select one or more text overlays to be included in the packet.

11. To assign text overlays to the template, select one or more text overlays from the **Available Text Overlays** list and add them to the **Assigned Text Overlays** list.
12. Click **Save**.

Note: Confidential supporting materials are NOT excluded from the meeting packets.

Editing a Meeting Packet Template

To edit a meeting packet template:

1. Select a meeting packet template from the **Meeting Packet Template** pane.
2. The meeting packet template's settings are displayed in the **Meeting Packet Template** pane.
3. Edit settings as necessary and click **Save**.

For more information on meeting packet template settings, see Creating a Meeting Packet Template on page 128.

Deleting a Meeting Packet Template

To delete a meeting packet template:

1. Select a meeting packet template from the **Meeting Packet Template** pane.
2. Click **Delete**.
3. Click **Yes** to delete the meeting packet template. Click **No** to cancel deletion.

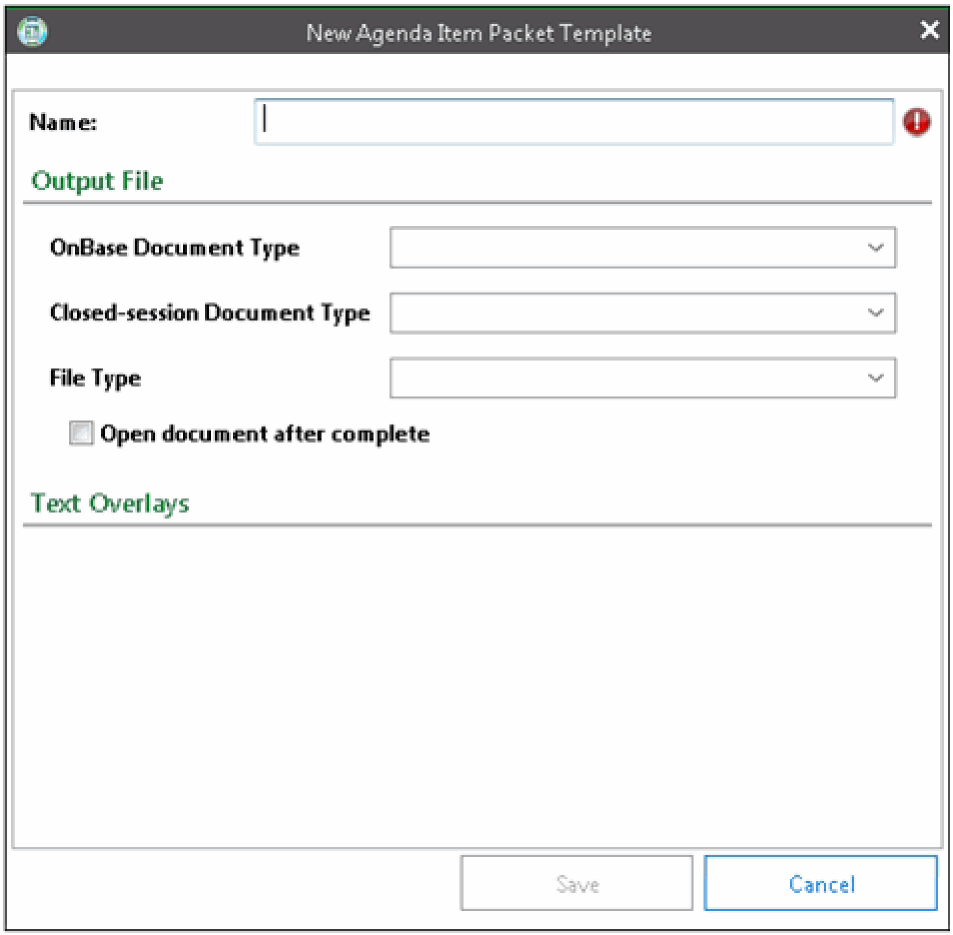
Note: You cannot delete a meeting packet template that is assigned to a meeting type.

Configuring Agenda Item Packets

Creating an Agenda Item Packet Template

To create an agenda item packet template:

1. On the **Administration** tab, from the **Packet Configuration** section, select **Agenda Item Packet Templates**. The **Agenda Item Packet Template** layout displays.
2. On the **Administration** tab, click **New**. The **New Agenda Item Packet Template** dialog box displays:



3. In **Name**, type a name for the packet template.

4. In **Output File**, specify the following:

Output File	Description
OnBase Document Type	To save the packet to OnBase, select this check box and select the OnBase Document Type where the generated packet should be stored. **Note:** This is a required field.
Closed-session Document Type	Select the OnBase Document Type where the generated closed-session document should be stored. **Note:** This is a required field.
File Type	Select the file format. **Note:** When using a Microsoft Word file format, it is considered a best practice to ensure the file format is using the extension **.docx**. When using a Microsoft Word file format with a different extension (e.g., **.doc**), unexpected behavior may occur when attempting to open the document in certain environments. **Note:** This is a required field.
Open document after complete	Select to open the packet after generation.

5. To assign text overlays to the template, select one or more text overlays from the **Available Text Overlays** list and add them to the **Assigned Text Overlays** list.
6. Click **Save**. The packet template you created is displayed in the **Agenda Item Packet Template** pane.

Note: The **Save** button is only enabled once a value has been entered for all available options.

Editing an Agenda Item Packet Template

To edit an agenda item packet template:

1. Select an agenda item packet template from the **Agenda Item Packet Template** pane.
2. The agenda item packet template's settings are displayed in the **Agenda Item Packet Template** pane.
3. Edit settings as necessary and click **Save**.

For more information on packet template settings, see Creating an Agenda Item Packet Template on page 132.

Deleting an Agenda Item Packet Template

To delete an agenda item packet template:

1. Select an agenda item packet template from the **Agenda Item Packet Template** pane.
2. Click **Delete**.
3. Click **Yes** to delete the agenda item packet template. Click **No** to cancel deletion.

Configuring Attendance, Motion and Vote Types

Attendance status types, motion result types and vote types are used in the OnBase Minutes application and the Agenda Minutes View when working with these items during a meeting.

Note: If you are installing Agenda for the first time, you must set up these types in Agenda before starting a meeting. If you do not set up these types prior to a meeting, an error message displays for the Minutes user indicating that the attendance status, motion and vote types need to be set up before they can run a meeting.

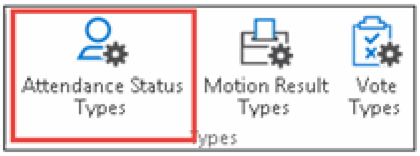
Configuring Attendance Status Types

Attendance status types display in the Roll Call tab in Agenda. The Roll Call tab displays in the Meeting Information pane, but only when the Minutes view is selected.

You can modify the default attendance statuses as needed.

To configure attendance status types:

1. From the **Types** section, select **Attendance Status Types**.



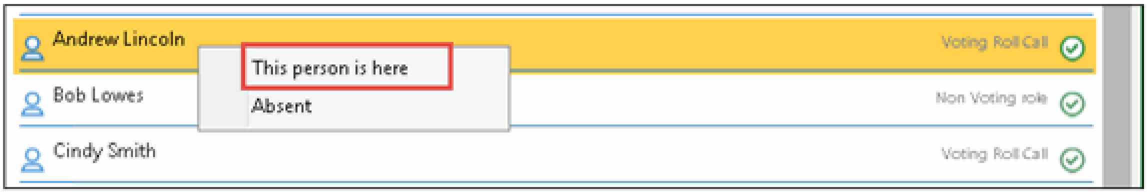
   The **Attendance Status Types** page displays.

2. Click **New** to add the default statuses to the left pane. Continue to click **New** until the icon becomes inactive. Default values include **Present** and **Absent**.

Note: If you are upgrading from a prior version of Agenda, you may see two additional status types (Excused and Remote) in the left pane that are not available with a new installation.

3. Select the default value you want to change from the left pane.

4. Change the text in the **Description** field to the description you want. You can enter up to 50 characters. The **Status Type** field remains the same.
5. Click **Save**.
6. From the Meeting Information pane, right-click a member in the Roll Call tab to view the modified status.

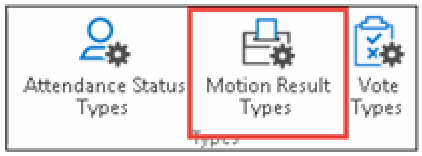


Configuring Motion Result Types

Motion result types display on the Motion tab in Agenda, in the Voting section in Minutes and in generated documents that have been published to Agenda Online. Motion results indicate whether a motion has passed, failed or is pending. You can modify the default statuses as needed.

To configure default motion result types:

1. From the **Types** section, select **Motion Result Types**.



   The **Motion Results Type** page displays.

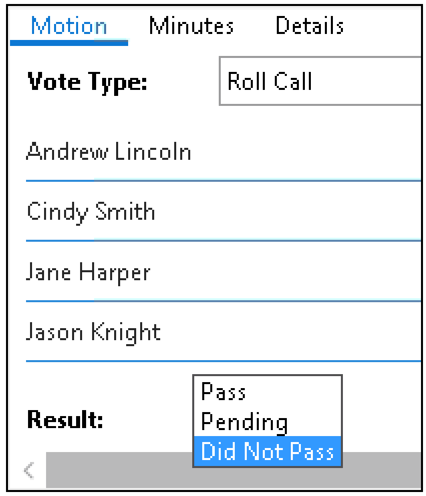
2. Click **New** to add the default motion result types to the left pane. Continue to click **New** until the icon becomes inactive. Default values include **Pass**, **Pending** and **Fail**.

Note: Before you can view a meeting in Agenda, all default motion result types must be added.

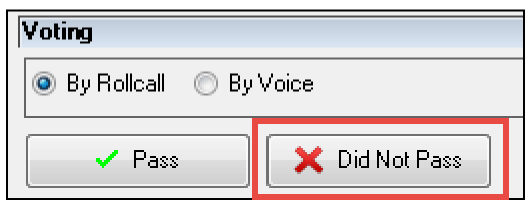
3. Select the default value you want to change from the left pane.

4. Change the text in the **Description** field to the description want. You can enter up to 50 characters. The **Status Type** field remains the same.

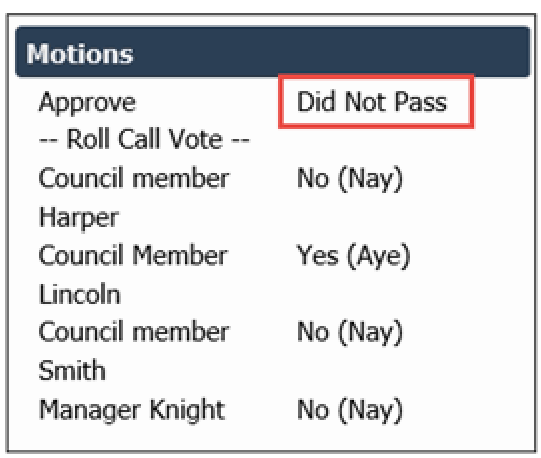
5. Click **Save**. The new Motion result displays in the following locations:
   - In Agenda in the Motions tab:



   - In the Minutes application in the Voting section:



   - In the Agenda Online application when viewing a generated Minutes document.



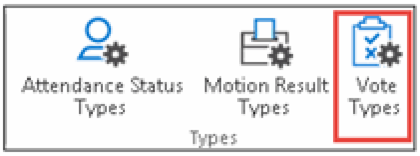
Configuring Vote Types

Vote types display on the Motion tab in Agenda, in the Minutes application and in generated documents that have been published to Agenda Online. Vote types indicate how members voted on motions (yes, not, abstain, etc.).

You can modify the default vote types as needed.

To configure default vote types:

1. From the **Types** section, select **Vote Types**.

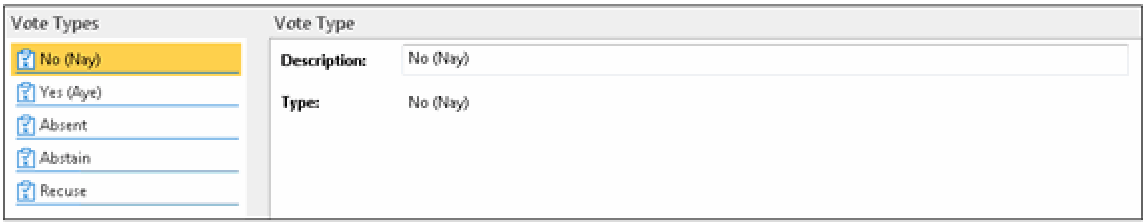


   The Vote Type page displays.

2. Click **New** to add the default motion result types to the left pane. Continue to click **New** until the icon becomes inactive. Default values include **No (Nay)**, **Yes (Aye)**, **Absent**, **Abstain** and **Recuse**.

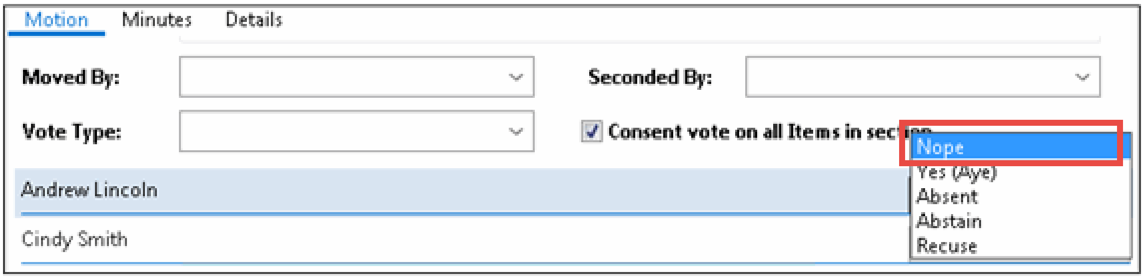
Note: Before you can view a meeting in Agenda, all default motion result types must be added.

3. Select the default value you want to change from the left pane.

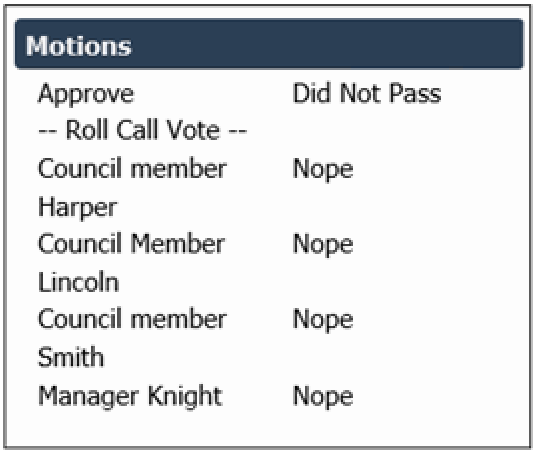


4. Change the text in the **Description** field to the description want. You can enter up to 50 characters. The **Types** field remains the same.

5. Click **Save**. The new Vote type displays in the following locations:
   - In Agenda in the Motions tab:



   - In the Agenda Online application when viewing a generated Minutes document:



Configuring Agenda Online

The OnBase Agenda Online portal allows you to view documents that have been published to the portal from Agenda. This provides the ability for the public to view agenda, minutes and summary documents. You can configure the Agenda Online portal to customize it for your environment. The **Public Access** section in the Agenda Administrator provides the ability to do the following:

- Select which options display on the Agenda Online Web site (Setting Display Options on page 140)
- Create custom pages for Agenda Online (Creating Page Maps on page 143)
- Add properties to the .CHSTML files to display long and short titles (.CSHTML Properties for Long and Short Titles on page 143)
- Provide styling options for the Agenda Online interface (Modifying Page Styles on page 143)

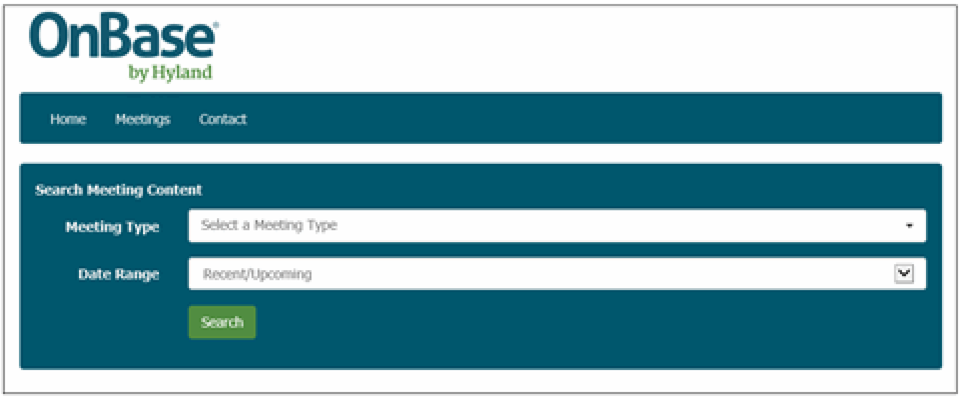
Setting Display Options

Select the **Options** icon to determine which options display on the Agenda Online Web site. The first time you access these options, default values display on the screen. You can modify the values as needed, and then save them to apply them to the Agenda Online Web site. Options include:

- **Document links display options**. Selecting these options provides links to Agenda, Action Summary and Minutes documents on the public page, but only if documents for these options have been published.
- **Search options**. Select the options you want available for searching on the public Web site. You can select from search text, meeting type and meeting date. You can also determine the number of items that display in the search results by entering a number in the Search Results Limit box.

Note: If a meeting or meeting document has not been published, that item will not be factored into the search results number.

- **Initial meeting list range display options**. Select how you want meetings to display on the Home page when you open the portal. First you must select the **Search Type** (days, weeks, months, years). Next you must select how many meetings you want to display within the parameters of the search type. Depending on the search type selected, here is how the **Search Before** and **Search After** fields work:
  - If you select **Days**, enter the number of days to search before and after today's date where 0=today's date.
  - If you select **Weeks**, enter the number of weeks to search before and after today's date where 0=today's date and 1=today's date plus 7 days.
  - If you select **Months**, enter the number of months to search before and after today's date where 0=today's date and 1=the same date in the next month. For example, if today's date is Feb. 9, the search pulls up meetings between Feb. 9 and March 9.
  - If you select **Years**, enter the number of years to search before and after today's date where 0=today's date and 1=the same date in the next year. For example, if today's date is Feb. 9, 2015 the search pulls up meetings between Feb. 9, 2015 and Feb. 9, 2016.
- **Search Result Options**. These options affect the **Meetings** page where you can run a meeting search.

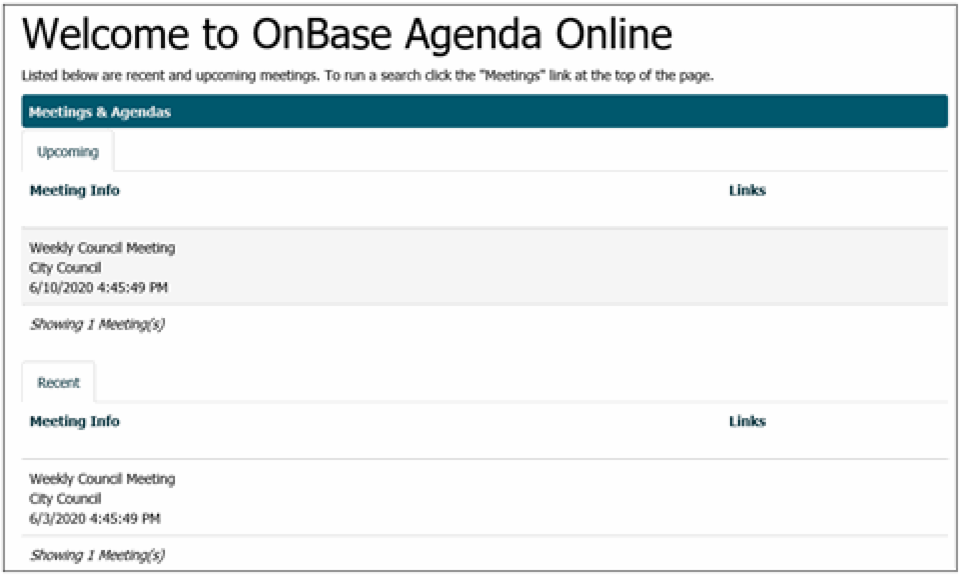


Select one or both of the following options:

- **Tabbed by Year**. Select this option to place search results in tabs by year on the **Meetings** page.

- **Upcoming Meetings Separated**. Select this option to separate meetings into Upcoming and Recent tabs on the **Meetings** page.

These same two settings also affect the **Home** page, which displays a pre-configured range of recent and upcoming meetings.



Note: Year tabs do not display on the **Home** page. The Year tabs display only in the **Meetings** page, where you can run a search.

The **Search Result Options** setting affects the **Home** page as follows:

- When both settings are unchecked, meetings display in a single list ordered by date in descending order, without tabs or separation. Meetings farthest out in the future are listed first, with the oldest meetings, or meetings in the past listed last.
- When only the **Upcoming Meetings Separated** option is selected, two distinct lists stacked vertically are displayed, with upcoming meetings listed first, and recent meetings listed second. The **Upcoming** and **Recent** tabs are not displayed at the top of the lists, rather the two lists are separate. **Upcoming** and **Recent** are inferred, based on the dates in each list. If the range contains meetings from multiple years, they are not be broken out into their own sections or tabs per year.
- When only the **Tabbed by year** option is selected, the **Upcoming** and **Recent** tabs display next to each other. Year tabs are not displayed if there are meetings from multiple years in the range. The **Upcoming** tab is shown by default.
- When both settings are selected, the **Upcoming** tab is displayed at the top of the list, and the **Recent** tab is listed below. If the list contains meetings from multiple years, meetings are not broken down by year.

Note: Upcoming meetings are defined as a meeting in which the start time is greater than the current date and time. This means that as soon as a meeting's start time has passed, the meeting is displayed in the **Recent** meeting list.

Creating Page Maps

Select the **Page Maps** icon to create custom pages for the Agenda Online site. To create a custom page:

1. Select the **Page Maps** icon.
2. Click **New**.
3. Type the appropriate information in the **Description**, **Original Page** and **Replacement Page** fields.
4. Click **Save**. The custom page is created.

Note: The /Views/_ViewStart.cshtml cannot be overridden with the page maps option.

Modifying Page Styles

Select the Page Styles icon to provide styling options for the Agenda Online interface. The first time you access the styling options, default values display on the screen. You can modify the values as needed and then save them to apply them to the Agenda Online Web site. Options include:

- **Label (dark)**: modify the labels that display on a light-colored background
- **Label (light)**: modify the labels that display on a dark-colored background
- **Main**: modify the color of the main areas of the page that contain fields or labels
- **Links**: modify the color of the links that display on the Home page and Meetings page
- **Background**: change the background color of the Web site
- **Search Button**: modify the color of the Search button that displays on the Meetings page
- **Main font**: modify the main font and font size displayed on all pages

.CSHTML Properties for Long and Short Titles

You can add properties to the .CSHTML files that allow you to use either short or long titles in Agenda Online. The following properties can be added to the .CSHTML files:

- Model.Item.ShortTitle - displays the short title
- Model.Item.LongTitle - displays the long title

An existing property has been modified to accommodate the addition of the properties listed above. The Model.Item.Title property now displays the long title if it is available. Otherwise, it will display the short title.

Configuring the Public Comment Button

By default, the **Public Comment** button is displayed up until the meeting start time. If you want this button to be displayed prior to the meeting start time, or after the meeting has ended, you must modify the `AvailabilityFromMeetingStart` option in the Agenda Online web.config file.

To modify the availability of the public comment option:

1. Open the web.config file from the **C:\inetpub\wwwroot\OnBaseAgendaOnline** directory.
2. Locate the `Hyland.Applications.AgendaPubAccess.PublicComment` section.
3. Modify the `AvailabilityFromMeetingStart` option to indicate when you want the public comment button displayed. For example:
    - If you want the comment button to display 2 hours prior the meeting start time, set this option to -2
    - If you want the comment button to display 2 hours after the meeting start time, set this option to 2.
4. Click **Save**.

System Interaction

Collaboration

Collaboration functionality is available when working with agenda items in Agenda. For more information, see Discussing an Agenda Item on page 250.

Note: Collaboration licensing is not required to use the functionality described in Discussing an Agenda Item on page 250.

Workflow

Workflow is used to perform actions on an agenda items. You can create a lifecycle and set up the actions within the lifecycle to allow agenda items to move through different areas of the system. Workflow lifecycles can also be created to generate cover sheets in Agenda for Unity and Entity (Legacy) forms.

General Workflow Actions

Workflow actions described in this section are only available when licensed for Agenda.

Configuring these Workflow actions differs slightly based on the action’s context. This context is automatically set when you choose the type of items that the life cycle contains, and is displayed in the **Properties** pane, on the **General** tab, in **Context**.

Note: If you are upgrading to OnBase Foundation EP5, and if you currently have a lifecycle that is using the Motion->Results field, you must modify the workflows to now use Motion->{Motion Context}Motion Result Type->Motion Result. This will require a modification to the lifecycles that currently use the Motion-> Results field.

Set Property from Field

Allows you to set the property specified in the **Property Name** field to the field value specified from the **Field** drop-down list.

Note: This action is supported only in the Unity Client.

To configure this action:

1. In the **Properties** pane, on the **General** tab, type a property name in the **Property Name** field.
2. From the **Field** drop-down list, select the field that will be used to set the property.

   When **Agenda Item** is the context, the following selections are available:

Field	Description
Agenda Item Id	The agenda item’s ID field.
Agenda Item Type	The agenda item’s type field.
Title	The agenda item’s title field.
Meeting Type	The agenda item’s meeting type field.
Is Closed Session	The agenda item’s closed session field.
Status	The agenda item’s status field.
Target Meeting	The agenda item’s target meeting field.

Field	Description
Minutes	The agenda item's minutes field.
Motion	The agenda item's motion field. You can also choose from the following related types: • Motion Type **Note:** To set the value for this type, make sure you use the number that corresponds to the desired motion type. Use **0** for **Pass**, **1** for **Pending**, and **2** for **Fail**. • Vote Type **Note:** To set the value for this type, make sure you use the number that corresponds to the desired vote type. Use **1** for a **RollCall** vote, use **2** for a **Voice** vote, and use **3** for a **Consent** vote. • Result • Description

When **Meeting** is the context, the following selections are available:

Field	Description
Meeting Name	The meeting's meeting name field.
Meeting Type	The meeting's meeting type field.
Time	The meeting's time field.
Location	The meeting's location field.
Organizer	The meeting's organizer field.

3. In the **Properties** pane, click the **Advanced** tab.
4. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Set Value

Allows you to set the field specified in the **Field to set** drop-down list to the specified value.

Note: This action is supported only in the Unity Client.

To configure this action:

1. In the **Properties** pane, on the **General** tab, from the **Field to set** drop-down list, select the field to set.

   When **Agenda Item** is the context, the following selections are available:

Field to set	Description
Agenda Item Id	The agenda item's ID field.
Agenda Item Type	The agenda item's type field.
Title	The agenda item's title field.
Meeting Type	The agenda item's meeting type field.
Is Closed Session	The agenda item's closed session field.
Status	The agenda item's status type ID.
Target Meeting	The agenda item's target meeting field.
Minutes	The agenda item's minutes field.

   When **Meeting** is the context, the following selections are available:

Field	Description
Meeting Name	The meeting's meeting name field.
Meeting Type	The meeting's meeting type field.
Time	The meeting's time field.
Location	The meeting's location field.
Organizer	The meeting's organizer field.

2. From the **Obtain value from** drop-down list, select one of the following locations to obtain the value from:

Obtain value from	Description
Constant value	This option sets the field value to the constant value specified.
Current date/time	This option sets the field value to the current date/time.

Obtain value from	Description
Current user name	This option sets the field value to the user name of the currently logged in user. If you want to use the configured real name for the user, select the **Use real name** option.
Property	This option sets the field value to the name of a property.
User group name(s) of current user	This option sets the field value to the user group(s) the current logged in user.

3. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Create or Update Agenda Item from Document

The **Create or Update Agenda Item from Document** action allows you to use an OnBase document or E-Form to add, update, or clear agenda items in Agenda. Before configuring this action, ensure that you have completely configured all necessary items in Agenda. See the Workflow documentation for more information.

Note: An Agenda license is required to configure and use this action.

This action allows you to use a document (typically an E-Form) to add, update, or clear agenda items. Before configuring this action, ensure that you have completely configured all necessary items in the Agenda client.

Note: This action is only supported in the Core-based Client and Unity Workflow interfaces.

Tip: As a best practice, this action should only be used as a System Task when you are creating a new Agenda Item and the **Agenda Item Primary Key** can be set to **Constant Value** of **0**.

Note: Exporting this action requires a destination database that already contains a meeting type or agenda item type.

Option: Agenda Item Information Mapping

Agenda Item Information Mapping is used to associate Agenda Item Fields with values from an OnBase E-Form or document.

To perform Agenda Item Information Mapping:

1. Click **Configure**.
2. The **Agenda Item Information Mapping** dialog box is displayed.
3. Select one of the following required Agenda Item Fields:
   - **Agenda Item Type** - Used to classify individual agenda items.

- **Agenda Item Primary Key** - The unique numeric value assigned to the agenda item by OnBase. This value is assigned when you create an agenda item, and used by OnBase to update the agenda item.

  When the **Agenda Item Primary Key** is set to a non-0 value, or a value that does not match that of an existing agenda item, users will be prompted to create a new agenda item when executing this task.

Note: Prompting users to create a new agenda item is not supported in the Unity Workflow interface.

Tip: When mapping the **Agenda Item Primary Key** to a **Constant Value**, use **0** to create new agenda items. You can also map the **Agenda Item Primary Key** to an E-Form Field Name. Doing so keeps this value hidden on the E-Form that you are using to update agenda items.

- **Meeting Type** - The name of the type of meeting the item is associated with.

Note: Ensure that any configured Agenda Item Fields are compatible with the selected Meeting Type. Agenda Item Fields are configured and assigned to Meeting Types, as described in the Agenda documentation.

- **Agenda Item Title** - The title of the agenda item.

4. Select one of the following from the **Get From** drop-down list:
   - **Constant Value** - A Constant Value will be used to populate the Agenda Item Field. Specify a value in the drop-down list or in the **Name or Value** field.
   - **E-Form Field Name** - An E-Form Field Name will be used to populate the Agenda Item Field. Type the E-Form Field Name in the **Name or Value** field.
   - **Keyword Type** - A Keyword Type will be used to populate the Agenda Item Field. Select a Keyword Type from the **Keyword Type** drop-down list.
   - **Workflow Property** - A Workflow Property will be used to populate the Agenda Item Field. Type the Workflow Property in the **Name or Value** field.

Note: The **Constant Value**, **E-Form Field Name**, or **Workflow Property** cannot exceed 255 characters.

5. Click **Update**.
6. Repeat steps 4 and 5 for the remaining required Agenda Item Fields.
7. Select any optional Agenda Item Fields from the **Agenda Item Field** drop-down list and configure them by performing step 4 and clicking **Add**. The Agenda Item Fields available from this drop-down list correspond to the Agenda Item Field names that were created via Agenda administration.

   If the agenda item will be closed session, select **Agenda Item Closed Session Flag**.

Note: The **Attachment Exclude From Packet Flag**, **Closed Session**, **Status**, and **Requestor** selections are reserved for future functionality.

8. When you have finished configuring Agenda Item Fields, click **Close**.

9. In the **Property to Store Agenda Item Primary Key** field, type **Agenda Item Primary Key**.
10. To configure **Related Documents**, select **Attached Related Documents**. Related documents become supporting documents for agenda items.
11. From the **Keyword Type to Set Related Document Order** drop-down list, select the Keyword Type being used to store the order of supporting documents attached to agenda items. If a Keyword Type has not been assigned to related documents for the purpose of storing the order of supporting documents attached to agenda items, **Keyword Type to Set Related Document Order** can be left blank.
12. Click **Apply**.

Tip: It is considered a best practice to check the resulting property value immediately after the **Create or Update Agenda Item from Document** action is executed by configuring the following rules: **Check Last Execution Result** and **Compare Property Value**. Configure the **Check Last Execution Result** to verify that the **Create or Update Agenda Item from Document** action occurred. Configure the **Compare Property Value** rule to use the property value that was set by the **Property to Store Agenda Item Primary Key** in the **Create or Update Agenda Item from Document** action.

Set Supporting Document

The **Generate Supporting Document** action allows the user to generate supporting documents from Tag Template supporting document types that are configured to **Create a supporting document for this item** in Workflow. When you create this action you can choose to create any supporting document type that has been configured in Agenda Manager that has the **Create a supporting document for this item** checked.

Before you configure this action, you must have created a document type in Agenda to support this action. See Configuring Agenda Item Supporting Document Types on page 68 for more information.

Note: This action can only be run under the context of an Agenda Item.

To configure this action:

1. In the **Properties** pane, on the **General** tab, from the **Supporting Document Type** drop-down list, select a document type that has been configured for agenda items.
2. If you want this document to be listed first in the list, select the **First Attachment** check box. Otherwise, leave it unselected.
3. If you want to copy the Generate Supporting Document handle to a property, select the **Copy Generated Supporting Document Handle to Property** check box. When you select this check box, you must specify the property in the field that has been activated.

Workflow Rules

Workflow rules described in this section are only available when licensed for Agenda.

Configuring these Workflow rules differs slightly based on the rule's context. This context is automatically set when you choose the type of items that the life cycle contains, and is displayed in the **Properties** pane, on the **General** tab, in **Context**.

Check Field Value

Checks a specified field value against another value.

1. In the **Properties** pane, on the **General** tab, from the **Field to Check** drop-down list, select the field to check.

   When **Agenda Item** is the context, the following selections are available:

Field to Check	Description
Agenda Item Id	The agenda item's ID field.
Agenda Item number	The agenda item's number.
Agenda Item Type	The agenda item's type field. You can also choose from the following related types: • agendaitemtypenum • agendaitemtypename • Template Id
Agenda Meeting View Type	This value corresponds to the view (Agenda or Minutes) that an agenda item belongs to. Values for this field are: • 0 = Agenda View • 1 = Minutes View
Is Closed Session	The agenda item's closed session field.
Is Section Item	Indicates whether a specific agenda item is paired with a section.
Meeting Type	The agenda item's meeting type field. You can also choose from the following related types: • agendaoutlinenum • ammeetingtypename • ammeetingtypenum • amorgannum: amorganname amorgannum amorgantype organdescription
Minutes	The agenda item's minutes field.

Field to Check	Description
Motion	The agenda item's motion field. You can also choose from the following related types: • Motion Type | Motion Type Name **Note:** To check the value for this type, make sure you use the name of the motion type (i.e., **Pass**, **Pending**, or **Fail**). • Vote Type **Note:** To check the value for this type, make sure you use the number that corresponds to the desired vote type. Use **1** for a **RollCall** vote, use **2** for a **Voice** vote, and use **3** for a **Consent** vote. • Result • Description
Status	The agenda item's status field. You can also choose from the following related types: • amaistatustypename • amaistatustypenum • amaistlgiconitemnum • amaistsmiconitemnum
Target Meeting	The agenda item's target meeting field. You can also choose from the following related types: • Location • Meeting Name • Meeting Type: agendaoutlinenum ammeetingtypename ammeetingtypenum amorgannum amorganname amorgannum amorgantype organdescription • Organizer • Time
Title	The agenda item's title field.
User Group	The user group assigned to the agenda item.

When **Meeting** is the context, the following selections are available:

Field to Check	Description
Location	The meeting's location field.
Meeting Name	The meeting's meeting name field.
Organizer	The meeting's organizer field.
Time	The meeting's time field.

2. Select the appropriate **Operator** from the drop-down list.

Note: The <, <=, >=, and > operators are not available for alphanumeric fields.

3. From the **Compare To** drop-down list, select one of the following for comparison:

Compare To	Description
Constant value	This option compares the field value to the constant value specified.
Current date/time	This option compares the field value to the current date/time.
Current user name	This option compares the field value to the user name of the currently logged in user. If you want to use the configured real name for the user, select the **Use real name** option.
Property	This option compares the field value to the value of the specified property.
User group name(s) of current user	This option compares the field value to the user group(s) the current logged in user.

Note: This rule evaluates false if the field to check is on a related type that does not exist, or if the field to check is null. If the field to check is an empty string, this rule will only evaluate to true when configured to compare to an empty string.

4. In the **Properties** pane, click the **Advanced** tab.
5. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Related Entity Exists

Checks to see if a related entity type exists for the current item.

1. In the **Properties** pane, on the **General** tab, from the **Related Entity Type** drop-down list, select a related entity type to evaluate using this rule.

   When **Agenda Item** is the context, the following selections are available:

Related Entity Type	Description
Agenda Item Field	An agenda item field.
Agenda Item To Meeting	An agenda item to a meeting.
Agenda Item Type	An agenda item type.
Meeting	A specific meeting instance.
Motion	An agenda item motion.
Supporting Document	An agenda item supporting document.
useraccount	A user account.

   When **Meeting** is the context, the following selections are available:

Related Entity Type	Description
Agenda Item	An agenda item.
Agenda Item To Meeting	An agenda item to a meeting.
Meeting Documents	A meeting document.

2. If you selected **Agenda Item**, **Agenda Item Field**, **Agenda Item To Meeting**, **Supporting Document**, or **Meeting Documents**, from the **Related Entity Type** drop-down list, you can filter the results. Select the **Filter Results** check box and perform the following:

   a. From the **Field** drop-down list, select one of the following:

Entity Type	Field
Agenda Item Field	• Agenda Item • Agenda Item Field Type • Agenda Item Field Value

Entity Type	Field
Agenda Item To Meeting	• Agenda Item • Agenda Section • Meeting
Supporting Document	• Agenda Item • Supporting Document ID

b. In **Must match:**, select **Constant value** or **Property** and enter a constant value or property.

3. If you do not want to use the results to execute sub-tasks, clear the **Use results for sub-tasks** check box.

Note: When using the results to execute sub-tasks, the rule's context sets the context for respective sub-tasks. The action's context is automatically set when you choose the type of items that the life cycle contains. The context is displayed in the **Properties** pane, on the **General** tab, in **Context**. If the direct task does not specify context, then the context specified by the most direct ancestor will be used. For example, if you nest multiple Related Item Exists rules that each provide context, the sub-tasks will use the deepest context.

4. If you want to store the result count in a property, select the **Save result count in property:** check box and enter the name of the property in the corresponding field.
5. In the **Properties** pane, click the **Advanced** tab.
6. In the **Properties** pane, click the **Documentation** tab. Enter any descriptive information that is applicable in the **Overview** and **Details** fields.

Option: Using Workflow to Operate on Agenda Items in a Meeting

You can use Related Entity Exists to iterate over agenda items in a meeting. You can also set up a sub-rule so that you distinguish between items in the Minutes View and items in the Agenda View. This type of relationship is set up using the Related Entity Exists Rule from a Meeting Entity.

To use the Related Entity Exists rule to work with agenda items:

1. Create a rule of type **Related Entity Exists**. Name it something that is specific to your instance (for example, "Check Agenda Items").
2. Set the **Related Entity Type** to **Agenda Item**. This pulls the Agenda Item Entity from the Relationship Entity.
3. Create a **Check Field Value** rule and name it **Is Minutes Item View?** with a constant value of 1. This filters out items that are not in the Minutes view.

Note: If you use an Agenda Item to Meeting Entity relationship, the order of the items in the meeting tree may not be respected. The Agenda Item to Meeting relationship will give access to all the sections in a meeting in addition to the Agenda Items. The Agenda Item Entity relationship only give access to items, not sections.

Document Composition

As of OnBase 16, Agenda Placeholders and templates are no longer supported or available in Document Composition. This includes the ability to configure Agenda Placeholders, to generate documents from previously created Agenda templates, and to retrieve Agenda templates created in Document Composition. Documents are now created using the Tag Template system. See Agenda Tag Templates on page 159 for more information.

Agenda Best Practices

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

Configuration

Restarting Agenda

It is considered a best practice to restart Agenda after making any configuration changes. Some configuration changes only take effect once Agenda has been restarted.

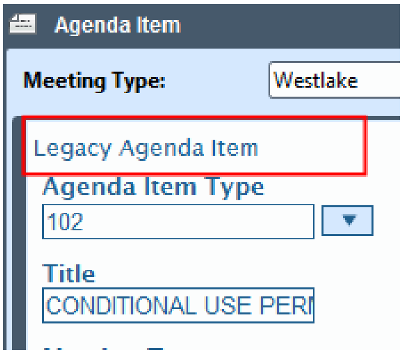
Installation

Considerations for Upgrading from the Legacy Agenda & Minutes Manager

The following are considered best practices when upgrading from the legacy Agenda & Minutes Manager to Agenda:

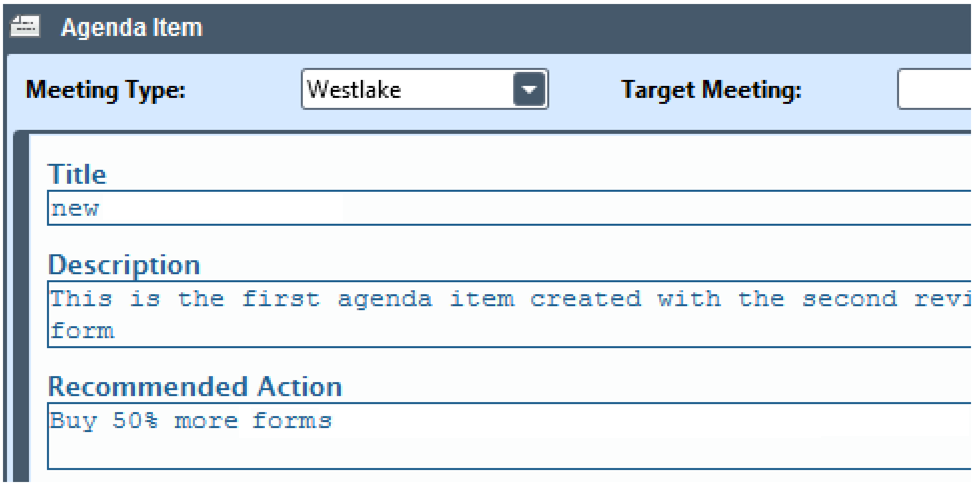
- The initial revision of the form that is used to create new agenda items should closely resemble the E-Form that was used in Workflow with the Agenda & Minutes Manager. This form should contain text indicating that the Agenda Item was created in Workflow with the Agenda & Minutes Manager.

  For example:

  After creating this initial revision, create a new revision, omitting the text explaining that this Agenda Item was created in Workflow with the Agenda & Minutes Manager. Add any enhancements to this form.

  For example:

Agenda Tag Templates

Tag Templates allow clerks to configure the layout of the Agenda and Minutes document templates within Microsoft Word using tags and configuration tables.

There are several tables and tags you can use to create a template. Specific information regarding table and tag placement and content include:

- Tables are placed at the top of the document for configuration purposes.
- The properties for each table are used for the layout of the sections and items in the document such as size, indentation and font properties.
- Tags (text enclosed in < > in the template) that are placed within each table cell are replaced during document generation based on the corresponding section, item, minute, motion, vote, etc.
- Tables that have the text “Level #” above them are used for sections and items.
- All content of the document above the <END_FORMATTING> tag, including a carriage return after the tag, is removed upon compilation of the document.
- Proper spelling of the tag is important. If you misspell a tag, the tag is not replaced with content.

Tables

There are several tables included in a tag template document. Each table must be in the template, but if a table is left empty, or if a label value has been changed (for example, replacing the “Vote” label with “Sample Vote”) a default table is added to the document with the following message:

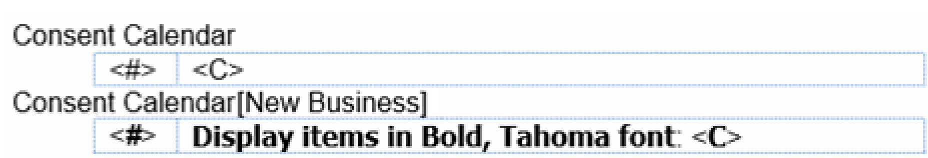
Table definition for <table type> has not been configured in the document template.

Overriding Sections in the Template

You have the ability to override all elements of a table in the template. If you need to override the formatting of any sections, levels or items, you can place a table below the default tables with the exact spelling of the section title or caption above it as shown in the following illustration.

Examples of specific overrides include:

- **Section Override**. If you want to display new business items in a consent calendar, you can create an override for the Consent Calendar section by creating a table underneath the original section that displays the formatting you want. The example below displays the override configuration.



- **Agenda Item Type Override** If an Agenda Type Item has been created for items with only one field, you can create an override to display formatting specific to those items with only one field. The example below displays the override configuration.

- **Section and Agenda Item Type Override**. If you want to override both the section and agenda type items, you can create an override table to display the formatting you want for the section and the items. The example below displays the override configuration.

New Business

This is an agenda item that has no fields. Only the title displays: <C>

New Business[Ordinance]

This is an agenda item type with only one field: <C>

New Business[Resolution]

Place regular field names here: <C>

- **Level and Agenda Item Type Override**. This override applies to items of specified item types within a specific level. To apply this override, enter the Item Types in square brackets (with no space in between). The example below displays the override configuration.

Level 3

<#>	<C>

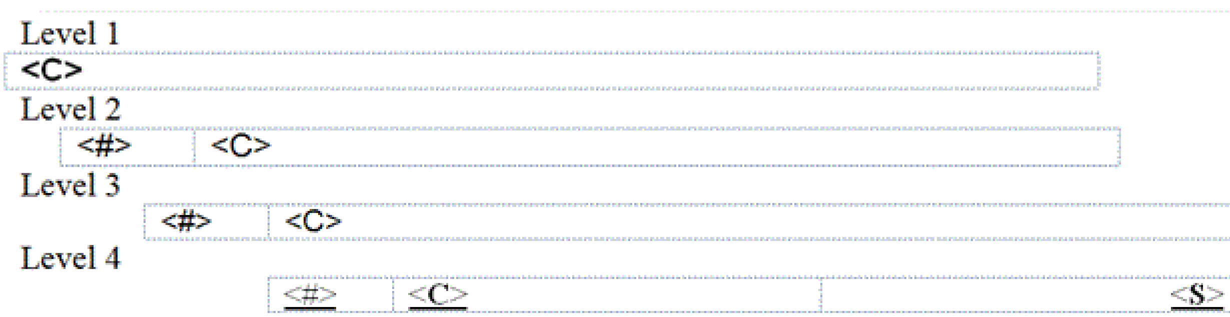
Level 3[New Item]

<#>	<C>

- **Parent Caption and Agenda Type Override**. This override applies to the items of specific item types within specified parent sections. To apply this override, enter the title of the section, followed by the Item Type in square brackets (with no space in between).
- **Parent Caption Override**. This override applies to all items in a specified parent section. To apply this override, enter the title of the section to be overriden.
- **Section Caption Override**. This override applies to the specified section table. This can be applied to any section at any level. To apply this override, enter the section caption text enclosed in square brackets.

Section and Item Tables

Tables that have Level <#> above them are used to layout the meeting section and item tree. The size and position of the table relative to the page is used for the layout of each section or item at that level. Each tables cell's paragraph alignment is used for the resulting text of the cell. The font settings of the tag are kept for the replaced text. The tag fields for the items can be inserted as well, using the name of the field as a tag with the < > surrounding it, such as <#fieldname>.



Minute Table

The minute table displays minutes either after the item or section table. It is always preceded by the Minute label and is highlighted in gray in a generated document.

Action Table

The action table displays any actions that were documented during the course of a meeting. It is always preceded by the Action label and is highlighted in orange in a generated document.

Motion Table

Each motion is displayed after the item table in chronological order of being recorded. It is always preceded by the Motion label.

Motion	**<motiontext>** **<motionstatus>** **Motion made to <motiontype> <motiontext> made by <mover format="[role] [title] [lastname]"><seconder_text> and seconded by <seconder format="[role] [title] [lastname]"></seconder_text>**

Vote Tables

Each vote is displayed after the respective motion table. The table used is determined by vote type, such as Roll Call, Voice and Consent. The text above each table displays the vote type:

- Vote = Roll Call Vote
- Voice Vote = Voice Vote
- Consent Vote = Unanimous Consent Vote

Vote	**For: <forcount>; Against: <againstcount>; Abstain: <abstaincount>; Absent: <absentcount>; Recused: <recusedcount>;**
Voice Vote	**For: <forcount>; Against: <againstcount>; Abstain: <abstaincount>; Absent: <absentcount>; Recused: <recusedcount>;**
Consent Vote	**For: <forcount>; Against: <againstcount>; Abstain: <abstaincount>; Absent: <absentcount>; Recused: <recusedcount>;**

Roll Call Table

This table allows the adding of member attendance information to the Summary or Minutes documents. This attendance would normally be captured during the meeting in the Minutes application. The roll call information can be configured to display in either single or multiple tables. It is always preceded by the Roll Call label.

Roll Call

Present
<attendees present="true" format="[role] [title] [firstname] [lastname]" delimiter="; "><absent_text>

Absent
<attendees absent="true" format="[role] [title] [firstname] [lastname]" delimiter="; "></absent_text>

Roll Call Item Heading [Present] [Voting]
Present and responding to roll call were the following:

Roll Call Item Heading [Absent] [Voting]
Absent

Roll Call Item Heading [Present] [Non-Voting]
Also Present:

Roll Call Item Heading [Absent] [Non-Voting]
Also Absent:

Roll Call Item
<attendee format="[role]">: <attendee format="[fullname]">

Roll Call Additional Item
<attendee format="[fullname]">

Template Tags

Template tags are markers used to indicate the information that will appear in that location in an Agenda or Minutes document. There are different types of tags depending on the information you want to display.

Tag Basics

Before you insert tags into a template, it is important to understand how they are used.

Simple Tag <tag>

Tags are made up by adding certain text inside <text> symbols. They are used in the meeting document templates as markers or place holders for data that is inserted during the generation of the document. The tags themselves are not case-sensitive unless otherwise noted. Be sure to form the tags correctly so they will work as intended. For example, do not leave a space between the brackets and the text: < text >.

The following examples display a tag within a document template, and then how the information displays in the resulting document:

The document template could include the following text and tag:

Meeting date: <meeting_date>

The resulting document looks like this for a meeting held on January 1, 2014 at 5:00pm:

Meeting date: 1/1/2014 5:00:00 PM

Wrapper Tag <tag></tag>

This tag type has a beginning tag and an ending tag such as <text></text>. They are used for the removal of text if specific criteria is not met. If the criteria is met, then just the beginning and ending tags are removed. This is commonly used if a motion does not have a seconder. Since that information is not needed, the wrapper tag would be used to remove the seconder information. This is illustrated in the following example:

The document template text would include the following text and tags:

Motion was moved by: <mover><seconder_text> and seconded by <seconder></seconder_text>

The resulting document looks like this for a motion that was moved by George Washington, but without a seconder.

Motion was moved by: George Washington

Since no one seconded the motion, the wrapper tag removed the seconder tag since it was not necessary.

If a motion had both a mover (George Washington) and a seconder (Abraham Lincoln), then the resulting document displays the following:

Motion was moved by: George Washington and seconded by Abraham Lincoln.

User-Defined Tags

If you create your own tag to be used in a document, you must precede the tag with a #. For example, if you create a field used to display the organizer of an event, the tag could be formatted as <#organizer>.

Tags Used in Templates

There are several tags that can be placed into a template. The tags have been grouped according to the functionality provided by the tag.

Note: There are specific tags that are used in the agenda item template created with a Unity form. See Unity Form Tags on page 177 for more information.

Tag	Description
Formatting Tag	
<end_formatting>	**End of formatting**. This tag is placed below the formatting tables, but above the document content. It marks the end of the formatting. During document compilation, both the tag and the content above it is removed.
Meeting Tags	
<meeting_body>	**Meeting body**. This tag is placed where you want the meeting outline placed in the document. When placing the <meeting_body> tag, you must adhere to the following rules: • Do not place the tag in the header or footer of the template. • This tag must be placed in a paragraph by itself. • This tag cannot be placed in a table by itself. Doing so makes the compiled file unusable. • If this tag is omitted, the outline is placed at the bottom of the document. • Do not place the <meeting_body> tag above the <end_formatting> tag. Doing so will cause content to be missing from the compiled document.
<meeting_type>	**Meeting type**. Place this tag where you want the type of meeting to display. Examples include Council Meeting or Board Meeting.
<meeting_name>	**Meeting name**. Place this tag where you want the name of the meeting to display. Examples include Monthly Board Meeting or Traffic Council Meeting.
<meeting_date>	**Meeting date**. Place this tag where you want the meeting date to display. You can add a formatting option to the date so it displays in the format you want. To change the formatting, add the string character you want after the tag. For example, the <meeting_date format="dddd, MMMM d, yyyy"> tag produces Monday, January 1, 2014. There are several standard and custom string character options for the meeting date. These can be found at http://msdn.microsoft.com/en-us/library/8kb3ddd4(v=vs.110).aspx.

Tag	Description
<meeting_time>	**Meeting time**. Displays the time the meeting is to take place. You can add a formatting option to the time so it displays in the format you want. To change the formatting, add the string character you want after the tag. For example, the <meeting_time format="h:mm tt"> tag produces 1:30 PM. There are several standard and custom string character options for the meeting time. These can be found at http://msdn.microsoft.com/en-us/library/8kb3ddd4(v=vs.110).aspx.
<meeting_location>	**Meeting location**. Displays the location of the meeting.
<next_meeting> </next_meeting>	**Next meeting.** This wrapper tag is used to wrap the text for the entire next meeting section of the document. Any tags are displayed in this section only if a meeting type is found for the meeting being compiled. If no meeting type is found, the tags and content inside the wrapper are removed from the generated document.
<next_meeting_name>	**Next Meeting Name**. This tag is replaced with the name of the next meeting in a generated document if one is found. The tag is removed if a next meeting is not found.
<next_meeting_type>	**Next Meeting Type**. This tag is replaced with the next meeting type in a generated document if one is found. The tag is removed if a next meeting is not found.
<next_meeting_date>	**Next Meeting Date**. This tag is replaced with the date of the next meeting in a generated document if one is found. The tag is removed if a next meeting is not found. This tag also accepts format attributes allowing the date to be formatted.
<next_meeting_time>	**Next Meeting Time.** This tag is replaced with the time of the next meeting in a generated document if one is found. The tag is removed if a next meeting is not found. This tag also accepts format attributes allowing the time to be formatted.
<next_meeting_location>	**Next Meeting Location.** This tag is replaced with the location of the next meeting in a generated document if one is found. The tag is removed if a next meeting is not found.

Tag	Description
Section and Item Tags	
<#>	**Item Outline Characters**. Use this tag when the outline characters need to be displayed for the logical flow of the document. This is used in the table formatting section of the template. For example, there are two items to display, items 1. and 2. In the template, it is configured as: <#>. <C> In the document, it displays as: 1. *item caption* 2. *item caption* **Note:** If you do not put a . after the <#> tag, the items display without it. For example, 1 *item caption*.
<C>	**Caption/title of an item or section**. Use this tag when you want to display the caption or title of an item or section. This is used in the table formatting section of the template. For example, there are two items, "First item to discuss" and "Second item to discuss." In the template, it is configured as: <#>. <C> In the document, it displays as: 1. First item to discuss 2. Second item to discuss **Note:** When this tag is used with a Unity form, and both Long Title and Short Title fields have information entered in them, the field displayed on the document is the Long Title. If only the Short Title field has information entered in it, then the Short Title field is displayed on the document.

Tag	Description
<#fieldname>	**Value of the field**. This tag is used when you want to display the text field value of an item or section. Items to note about field tags include: • They must always have a # in front of it to indicate that it is a field tag. • The< or > symbols must not be in a field name. • The field tag name cannot end or start with a space. • If the field value contains the field tag, the < and > characters are replaced with (and)respectively for the value. For example, if you have a field named Cost and the value is $1,000 <#Cost>, the resulting text displays $1,000 (#Cost). In our example, the FiscalImpact field is used to show an impact of $40,000 for the first item and $10,000 for the second item. In the template, it is configured as:  <#>. <C> that will cost <#FiscalImpact> In the document, it displays as: 1. First item to discuss that will cost $40,000. 2. Second item to discuss that will cost $10,000. If the field name tag value is empty, the following rules are put into place: • If the tag is in the middle of text, then the tag and either the space after or before is removed. • If the tag is on a line by itself, the entire line is removed. • If the tag is in a table cell by itself, then the cell is left empty. • If the tag is in a table row by itself, then the entire row is removed, as well as any empty rows that are in proximity to the tag. • If the tag removal results in an empty table, then the table and any empty paragraphs are removed. **Note:**
<closed_session>	**Exclude Closed Session Information**. Use this tag to exclude information from the document compilation that is for a closed session only. Add this tag anywhere above the <end_formatting> tag. Add either “sections” or “items” to the tag to specify the areas of the template to be excluded. If you want to exclude an area, configure the tag with: • To exclude an item: <closed_session exclude=”item”> • To exclude a section: <closed_session exclude="session"> • To exclude both: <closed_session exclude="sections","item"> or <closed_session exclude="item","sections"> This tag is used to control template output only. It is not replaced by any text in the document.

Tag	Description
Minutes Tag	
<minutes>	**Minutes text for an item or section**. This tag is used when a minute is recorded for an item or section. In the template, it is configured as: Minute <minutes> In the document it displays as: This is a minute
Action Tag	
<action>	**Action text for an item or section**. This tag is used when a minute is recorded for an item or section. In the template, it is configured as: Action <action> In the document is displays as: This is an action
Motion Tags	
<motiontext>	**Text of motion**. This tag is used to display the text of a motion. The text is displayed below it's respective item or section. In our example, the motion text is "Motion to create committee." In the template, it is configured as: Motion: <motiontext> In the document, it displays as: 1. First item to discuss that will cost $40,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee 2. Second item to discuss that will cost $10,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee

Tag	Description
<motiontype>	**Type of motion**. This tag is used to display the type of motion. It is displayed below it's respective item or section. In our example, the motion text for each motion is "approve." In the template, it is configured as: Motion: <motiontext> is <motiontype> In the document, it displays as: 1. First item to discuss that will cost $40,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved 2. Second item to discuss that will cost $10,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved
<mover>	**Attendee who made the motion**. This tag is used to display the name of the attendee who made a motion. You can add formatting values to this tag to customize how the name displays. The formatting options include: • [title]. Displays the attendee's title. • [firstname]. Displays the attendee's first name. • [lastname]. Displays the attendee's last name. • [fullname]. Displays the full name of the attendee, including the middle name if available. In our example, Dr. Bob Smith made the motion. In the template, it is configured as: Motion: <motiontext> is <motiontype> Made by <mover format="[title] [firstname] [lastname]> In the document, it displays as: 1. First item to discuss that will cost $40,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved Made by Dr. Bob Smith 2. Second item to discuss that will cost $10,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved Made by Dr. Bob Smith

Tag	Description
<seconder>	**Attendee who seconded the motion**. This tag is used to display the name of the attendee who seconded a motion. You can add formatting values to this tag to customize how the name displays. The formatting options include: • [title]. Displays the attendee's title. • [firstname]. Displays the attendee's first name. • [lastname]. Displays the attendee's last name. • [fullname]. Displays the full name of the attendee, including the middle name if available. In our example, Jane Jones seconded the motion. In the template, it is configured as: Motion: <motiontext> is <motiontype> Made by <mover format="[title] [firstname] [lastname]> Seconded by <seconder format="[fullname]> In the document, it displays as: 1. First item to discuss that will cost $40,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved Made by Dr. Bob Smith Seconded by Jane Jones 2. Second item to discuss that will cost $10,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved Made by Dr. Bob Smith Seconded by Jane Jones
<seconder_text> </seconder_text>	**Removes text when a motion does not have a seconder**. This wrapper tag is used to remove any mention of a seconder when a seconder for a motion does not exist. In our example, the second motion does not have a seconder. In the template it is configured as: Motion: <motiontext> is <motiontype> Made by <mover format="[title] [firstname] [lastname]><seconder_text> Seconded by <seconder format="[fullname]></seconder_text> In the document, it displays as: 1. First item to discuss that will cost $40,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved Made by Dr. Bob Smith Seconded by Jane Jones 2. Second item to discuss that will cost $10,000 Minutes: create a committee to discuss feasibility Motion: Motion to create committee is Approved Made by Dr. Bob Smith

<table>
<tr><th>Tag</th><th>Description</th></tr>
<tr><td><motionstatus></td><td>Status of a motion. This tag is used to display the status of the motion below it’s respective item or section.
In our example, the first motion passes and the second motion fails.
In the template, it is configured as:
Motion: <motiontext> is <motiontype>
Made by <mover format="[title] [firstname] [lastname]"><seconder_text>
Seconded by <seconder format="[fullname]"></seconder_text>
Result: <motionstatus>

In the document, it displays as:
1. First item to discuss that will cost $40,000
Minutes: create a committee to discuss feasibility
Motion: Motion to create committee is Approved
Made by Dr. Bob Smith
Seconded by Jane Jones
Result: Passed
2. Second item to discuss that will cost $10,000
Minutes: create a committee to discuss feasibility
Motion: Motion to create committee is Approved
Made by Dr. Bob Smith
Result: Failed</td></tr>
<tr><td colspan="2">Voting Tags</td></tr>
<tr><td colspan="2">Vote Counts. There are several voting tags that can be used to display counts of each vote type for a motion. Each count is displayed below their respective item or section. The voting tags that display counts include:
• <forcount>. Count of attendees who vote in the affirmative.
• <againstcount>. Count of attendees who vote in the negative.
• <abstaincount>. Count of attendees who abstain from voting.
• <recusedcount>. Count of attendees who recuse themselves from voting.
• <absentcount>. Count of attendees who are absent from the vote.
In our example, there are 5 votes to the affirmative, 2 votes against, 1 attendee abstaining from the vote, 2 attendees recusing themselves and 1 attendee absent from the vote.
In the template, it is configured as:
Votes for: <forcount>
Votes against: <againstcount>
Votes abstain: <abstaincount>
Votes recused: <recusedcount>
Votes absent: <absentcount>

In the document, it displays as:
Votes for: 5
Votes against: 2
Votes abstain: 1
Votes recused: 2
Votes absent: 1</td></tr>
</table>

<table>
<tr><th>Tag</th><th>Description</th></tr>
<tr><td colspan="2">

Attendee Names. There are several voting tags that can be used to display **attendee names** for each vote type for a motion. Each name is displayed alongside the vote count.

The voting tags that display attendee names include:

- **<fornames>**. List of attendees who vote in the affirmative.
- **<againstnames>**. List of attendees who vote in the negative.
- **<abstainnames>**. List of attendees who abstain from voting.
- **<recusednames>**. List of attendees who recuse themselves from voting.
- **<absentnames>**. List of attendees who are absent from the vote.

These tags display in a comma-separated list alongside the voting count for the applicable section or item.

You can add formatting values to this tag to customize how the name displays. The formatting options include:

- [title]. Displays the attendee’s title.
- [firstname]. Displays the attendee’s first name.
- [lastname]. Displays the attendee’s last name.
- [fullname]. Displays the full name of the attendee, including the middle name if available.

In the template, it is configured as:

```
Votes for: <forcount> : <fornames format="[title] [lastname]">
Votes against: <againstcount> : <againstnames format="[firstname] [lastname]">
Votes abstain: <againstcount> : <abstainnames format="[lastname]">\
Votes recused: <recusedcount> : <recusednames format="[fullname]">
Votes absent: <absentcount> : <absentnames>
```

In the document, it displays as:

Votes for: 5: Mayor Brown, Councilman Green, Councilwoman Black, Councilman White, Councilwoman Red

Votes against: 2: Mary Blue, John White

Votes abstain: 1: Jane Green

Votes recused: 2: Jones, Smith

Votes absent: 1: Mary A. White

</td></tr>
</table>

<table>
<tr><th>Tag</th><th>Description</th></tr>
<tr><td colspan="2">
Voting Text Tag. These wrapper tags wrap around text that is removed when there are no votes that match up with the tag.
Voting text tags include the following:

<for_text>. Removes text when there is no vote in the affirmative.
<against_text>. Removes text when there is no vote in the negative.
<abstain_text>. Removes text when no one abstains from voting.
<recused_text>. Removes text when no one recuses themselves from voting.
<absent_text>. Removes text when no one is absent from the vote.

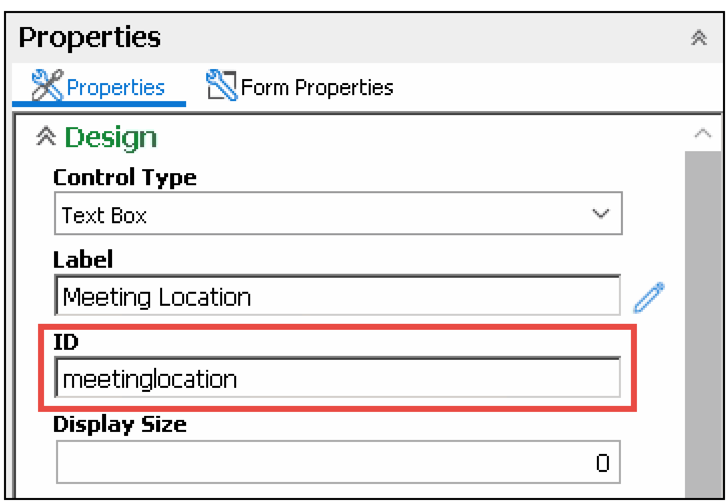
In our example, let’s say that no one was absent from the vote, so that value is set to 0. The Voting Text Tag removes the Votes absent heading from the document.
In the template, it is configured as:
<pre>
<for_text>Votes for: <forcount> : <fornames format="[title] [lastname]"></for_text>
<against_text>Votes against: <againstcount> : <againstnames format="[firstname]
[lastname]"></against_text>
<abstain_text>Votes abstain: <againstcount> : <abstainnames
format="[lastname]"></abstain_text>
<recused_text>Votes recused: <recusedcount> : <recusednames
format="[fullname]"></recused_text>
<absent_text>Votes absent: <absentcount> : <absentnames></absent_text>
</pre>
In the document, it displays as:
Votes for: 5: Mayor Brown, Councilman Green, Councilwoman Black, Councilman White, Councilwoman Red
Votes against: 2: Mary Blue, John White
Votes abstain: 1: Jane Green
Votes recused: 2: Jones, Smith
</td></tr>
</table>

Tag	Description
<noabsent_text> </noabsent_text>	This wrapper tag is used to wrap around text that is removed when at least one attendee is absent for a vote. In our example, we have 5 votes to the affirmative, 4 votes against, 0 attendees abstaining from voting, 0 attendees recusing from voting and 0 absent attendees. In the template, it is configured as: <for_text>Votes for: <forcount> : <fornames format="[title] [lastname]"></for_text> <against_text>Votes against: <againstcount> : <againstnames format="[firstname] [lastname]"></against_text> <abstain_text>Votes abstain: <againstcount> : <abstainnames format="[lastname]"></abstain_text> <recused_text>Votes recused: <recusedcount> : <recusednames format="[fullname]"></recused_text> <absent_text>Votes absent: <absentcount> : <absentnames></absent_text> <noabsent_text>All council members were present</noabsent_text> In the document, it displays as: Votes for: 5: Mayor Brown, Councilman Green, Councilwoman Black, Councilman White, Councilwoman Red Votes against: 4: Mary Blue, John White, Alice Yellow, Joe Black All council members were present
<unanimous_for> </unanimous_for> <unanimous_against> </unanimous_against>	These wrapper tags are used to wrap around text that displays when all votes are either for or against a motion. This tag excludes any absent and recused votes. In the template, it is configured as: <motionstatus> For: <forcount>; Against: <againstcount>; Abstain: <abstaincount>; Absent: <absentcount>; Recused: <recusedcount> <unanimous_for>The decision was Unanimous For</unanimous_for> <unanimous_against> The decision was Unanimous Against</unanimous_against> Depending on how the vote went, you will see wither of the following: For: 5 Against: 0 Abstain: 0 Absent: 0 Recused: 0 The decision was Unanimous For For: 0 Against: 5 Abastin: 0 Absent: 0 Recused: 0 The decision was Unanimous Against

Tag	Description
<divided> **</divided>**	This wrapper tag is used to wrap around test that displays when the votes for a motion are divided. Essentially, this tag displays when the vote is neither unanimous for or unanimous against. In the template, it is configured as: <motionstatus> For: <forcount>; Against: <againstcount>; Abstain: <abstaincount>; Absent: <absentcount>; Recused: <recusedcount> <unanimous_for>The decision was Unanimous For</unanimous_for> <unanimous_against> The decision was Unanimous Against</unanimous_against> <divided>The decision was divided</divided> In the document, it displays as: For: 3 Against: 2 Abstain: 0 Absent: 0 Recused: 0 The decision was divided

Unity Form Tags

If you have an agenda item created from a Unity form, you can also add tags that match the text ID in the Unity form. When creating the Unity form template, define the tag in the **ID** field in the **Properties** pane.



In your tag template document, enter the following tag:

Meeting Location: <#meetinglocation>

Tags can be created for any property control field placed on the Unity form.

Configuring Tags for Conditional Text

Meeting document and Item document Tag Template tags can include conditional text which is displayed based on a selected field containing a value.

In many cases customers want a certain static text value to be displayed only if the item form field actually has a value to go along with it. For example if a field was created and named "Item Information," it should be displayed only if the Item Information field in the agenda item form was filled out.

When creating the Item Information field in the Unity form, the ID in the Property Controls must be set with the following appended to it: _text. The Item Information ID may look like the following: #textboxItemInformation_text

In the tag template, the configuration would look like the following:

<#textboxItemInformation_text> Item Title:<#textboxItemTitle></
#textboxItemInformation_text>

One of the following is displayed in the generated document:

- If information was entered into the Item Information field, it would display as usual in the generated document.
- If no information was entered in the Item Information field, nothing, not even the field label, would be displayed in the generated document.

Roll Call Tags

Roll call tags can be configured in either single or multiple tables. Before you configure roll call tags, you must configure a special tag that displays at the top of the tag template. This tag tells the system which table configuration to use.

If you want to use a **single** table configuration, the tag would be:

<roll_call_options singletable="true">

If you want to use the **multiple** table configuration, the tag would be:

<roll_call_options singletable="false">

Single Table Configuration

When the roll_call_options tag is set to true, the single table configuration is used. The following table would be copied, and would replace the <roll_call> tag specified in the template:

Roll Call	Present <attendees present="true" format="[role] [title] [firstname] [lastname]" delimiter="; "><absent_text> Absent <attendees absent="true" format="[role] [title] [firstname] [lastname]" delimiter="; "></absent_text>

Attendees Tag

This tag is used to display a list of attendees in a delimited list. The configuration options for this tag include:

Option	Description
present	Displays a list of the attendees that were present at the meeting. Must be set to true to display.
absent	Displays a list of the attendees that were absent at the meeting. Must be set to true to display.
excused	Displays a list of the attendees that were excused for this meeting. This is for legacy data and must be set to true to display.
remote	Displays a list of the attendees that were remote for this meeting. This is for legacy data and must be set to true to display.

Format Tag

This tag specifies the format for each attendee. The configuration options for this tag include:

Option	Description
[title]	The title (if any) for the attendee.
[firstname]	Displays the attendee's first name.
[lastname]	Displays the attendee's last name.
[fullname]	Displays the full name of the attendee.
[role]	Displays the attendee's role, if specified.
[status]	Displays the attendee's status, if specified.

Delimiter Tag

This tag specifies the text that displays between each attendee. If this tag is not specified, the default value is ", " (comma space).

The tag displays as: **delimiter**.

Absent Text Tag

This is a wrapper tag that removes the absent text if no members are listed as absent.

The tag displays as **<absent_text></absent_text>**

When the this tag is used, the configuration looks like the following:

```
Voting body members Present:
<attendees voting="true" present="true" format="[role] [lastname]" delimiter=", ">

Non-Voting body members Present:
<attendees voting="false" present="true" format="[role] [lastname]" delimiter=", "><absent_text>

Absent:
<attendees absent="true" format="[role] [lastname]" delimiter=", "></absent_text>
```

The result displays as the following:

Voting body members Present:
Mayor Smith, Council Member Jones, Council Member Brown, Council Member Larsen, Council Member Truman, Council Member Gibson

Non-Voting body members Present:
Clerk Clark

Sample Single Table Configurations

To get a better idea as to how to configure your single table roll call configuration, take a look at the following samples:

- Example using the **present, absent**, **format**, and **delimiter** tags.
  Configuration:

```
Present:
<attendees present="true" format="[role] [lastname]" delimiter="; ">

Absent:
<attendees absent="true" format="[role] [lastname]" delimiter="; ">
```

Result:

Present:
Mayor Smith; Council Member Jones; Council Member Brown; Council Member Larsen; Clerk Clark

Absent:
Council Member Truman; Council Member Gibson

- Example using the **voting**, **present**, **absent**, **format**, and **delimiter** tags.
  Configuration:

```
Voting body members Present:
<attendees voting="true" present="true" format="[role] [lastname]" delimiter=", ">

Non-Voting body members Present:
<attendees voting="false" present="true" format="[role] [lastname]" delimiter=", ">

Absent:
<attendees absent="true" format="[role] [lastname]" delimiter=", ">
```

  Result:

```
Voting body members Present:
Mayor Smith, Council Member Jones, Council Member Brown, Council Member Larsen


Non-Voting body members Present:
Clerk Clark

Absent:
Council Member Truman, Council Member Gibson
```

Multiple Table Configuration

When the roll_call_options tag is set to false, the multiple table configuration is used. The following table would be copied, and would replace the <roll_call> tag specified in the template:

Roll Call Item Heading [Present] [Voting]

Present and responding to roll call were the following:

Roll Call Item Heading [Absent] [Voting]

Absent

Roll Call Item Heading [Present] [Non-Voting]

Also Present:

Roll Call Item Heading [Absent] [Non-Voting]

Also Absent:

Roll Call Item

<attendee format="[role]">:	<attendee format="[fullname]">

Roll Call Additional Item

	<attendee format="[fullname]">

Note: The **excused** and **remote** tags are not available in this configuration.

When using the multiple table configuration, note that the order of each member in the roll call is ordered by their attendee order and defined as:

- Present and Voting members
- Absent and Voting members
- Present, Non-Voting
- Absent, Non-voting

Table Definitions

The following table definitions are available for configuration:

Table Definition	Description
Roll Call Item Heading [Present] [Voting]	This option is placed before all voting members who are present. Note that tags are not replaced in this table
Roll Call Item Heading [Absent] [Voting]	This option is placed before all voting members who are absent. Note that tags are not replaced in this table.
Roll Call Item Heading [Present] [Non-Voting]	This option is placed before all non-voting members who are present. Note that tags are not replaced in this table.
Roll Call Item Heading [Absent] [Non-Voting]	This option is placed before all non-voting members who are absent. Note that tags are not replaced in this table.
Roll Call Item	This option is placed for every attendee.
Roll Call Additional Item	This option is placed for attendees after the first is placed. This is used in conjunction with the Roll Call Item table to alter the formatting of the additional attendees.

Attendee Tag

This tag allows you to specify the format for each attendee. When used with the **format** tag, formatting options include:

- [title]
- [firstname]
- [lastname]
- [fullname]
- [role]
- [status]

If this option is not used, the default format of [fullname] is used.

Sample Multiple Table Configuration

To get a better idea as to how to configure your multiple table roll call configuration, take a look at the following sample:

Configuration:

Roll Call Item Heading [Present] [Voting]
Present and responding to roll call were the following:

Roll Call Item Heading [Absent] [Voting]
Absent

Roll Call Item Heading [Present] [Non-Voting]
Also Present:

Roll Call Item Heading [Absent] [Non-Voting]
Also Absent:

Roll Call Item
<attendee format="[role]">: <attendee format="[fullname]">

Roll Call Additional Item
<attendee format="[fullname]">

Result:

Present and responding to roll call were the following:

Mayor:	Bob D. Smith
Council Member:	Marcy L. Jones
	J. Randall Brown
	Melvin Larsen
Absent	
Council Member:	Truman
	Gibson
Also Present:	
Clerk	Abby M. Clark

Note: Since no non-voting members were absent, the **Roll Call Item Heading [Absent] [Non-Voting]** table was not used.

Configuration Overview

Unity forms are used when creating agenda items, and to allow comments to be submitted by the public in Agenda Online. The following items must be configured in OnBase Configuration and Unity Forms Designer to enable forms in Agenda: The following steps are necessary to configure an Agenda Item Form template:

1. Create a Document Type to associate with the form template. See Configuring Document Types for Agenda Forms on page 184 for more information.
2. Configure User Rights for HTML Forms. See User Rights on page 186 for more information.
3. Access the Designer. See Accessing the Designer on page 187 for more information.
4. Create the form template. See Creating an Agenda Item Form Template on page 189 for more information.

Configuring Document Types for Agenda Forms

There are specific items that need to be configured related to Document Types before configuring a form template.

- A specific default file format is not required for Document Types that are associated with Agenda. The Agenda engine does not rely on any specific default file format to be configured at the Document Type level.
- All Keyword Types and Keyword Type Groups that will be needed on a form should be configured on the Document Type that will be used in conjunction with the form. AutoFill Keyword Sets used in Agenda also need to be configured and assigned to the appropriate Keyword Types in the Configuration module.

Note: If the Keyword Types assigned to a Document Type associated with Agenda are changed, the values on existing Agenda associated with Keyword Types that are no longer assigned to the Document Type will be saved as non-keyword data.

- At the time of form template configuration in the Forms Designer, a form template is associated with a Document Type.
- A specific Document Type must be created for the commenting option in Agenda Online. The User Group assigned to this Document Type must contain the user that is associated with Agenda Online in the web.config file. See Create an Agenda User in OnBase Config on page 53 and Configuring User Groups to Allow Public Comments in Agenda Online on page 187 for more information.

Configuring Document Types for Similar Forms

In some cases, multiple forms that have similar purposes, but differ slightly, need to be routed through the same business process. Here are a few examples of when this may occur:

- A form can be slightly different depending on which state invoices were generated in. State laws and taxation can require different data and calculations from state to state to be incorporated on a form. In this scenario, a form template would be created for each state involved in the process tailored to the data requirements for that state.
- A form needs to be available on an external web site, as well as internally in a company. The external form needs to have more instructions and has a fewer number of fields on it than the internal version. The forms follow the same exact process.

If all of the forms follow the same process that is defined in a Workflow Life Cycle, it would not make sense to create a Workflow Life Cycle for each form when these similar forms follow the exact same process.

In this scenario, it would be most efficient to associate all of the similar form templates with the same Document Type. Multiple form templates can be configured and associated with a single Document Type. Multiple templates should be associated with a single Document Type only when all of the templates are used for the same purpose.

When using multiple templates within a single Document Type, it is recommended to use a Keyword Type to clearly identify what template a document is using and to configure an auto-name string that will clearly identify it.

Configuring Document Types to Not Prompt for New Forms

Upon completion and submission of a form, the system’s default behavior is to ask users if they want to create an additional form of the same type. If you do not wish for this message to be displayed for an Image Form, in the Document Type associated with the form, check the **Don’t prompt for new form after submit** check box. This is particularly useful for organizations that have no need to submit the same form consecutively.

To configure a Document Type to not prompt for a new Image Form after submission:

1. In the Configuration module, select **Document | Document Types**.
2. Select the appropriate Document Type.
3. Click **E-Form**.
4. Select the **Don't prompt for new form after submit** check box.
5. Click **Apply**.
6. Click **Close**.

Caution: The **Don’t prompt for new form after submit** setting applies to all revisions of the form.

User Rights

The following user rights must be configured when creating Unity Forms to work with Agenda:

- User Rights Required for Submitting Agenda Forms on page 186
- User Rights Required for Publishing Templates on page 186
- Granting User Rights for Form Templates on page 186
- Configuring User Groups the Right to Configure Form Templates on page 187

User Rights Required for Submitting Agenda Forms

In order to create and fill out forms, users must have product rights to HTML Forms. To assign product rights:

1. In the Configuration module select **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.
2. Select the **User Group Name**.
3. Click **Product Rights**. The **Assigning Product Rights for <name> Group** is displayed.
4. Select the **HTML Forms** check box.
5. Click **Save**.

User Rights Required for Publishing Templates

In order to publish form templates, a user must have rights to SYS HTML Forms Document Type. When a template is published, it is stored in the SYS HTML Forms Document Type.

Granting User Rights for Form Templates

In order to grant user groups the rights to use specific sections or pages within a form template or to configure form visibility, there are rights a user must have.

In order for a user to grant rights to other users that belong to their user group(s), a user must belong to a user group that has the **Usergroup Security** in the **Configuration Rights** dialog box, granted at the user group level. If a user belongs to a user group that has this right granted, the user can configure user groups rights on form templates for all the user groups to which he or she belongs.

In order for a user to grants rights to all user groups, the user must have the **User Group Administrator** right granted in the **User Settings** dialog box.

Configuring User Groups the Right to Configure Form Templates

In order for user groups to have the ability to configure form templates, they must be granted the **Unity Forms** Configuration right. If a user group does not have this right granted, users in the user group will not have access to the **Forms | Designer** menu. To grant user groups the right to configure form templates:

1. In the Configuration module, select **Users | User Groups/Rights**.
2. Select the user group you want to grant rights to.
3. Click **Configuration Rights**.
4. Select the **Products** tab.
5. Select **Forms Designer**.
6. Click **Save**.

Configuring User Groups to Allow Public Comments in Agenda Online

The User Group associated with the Document Type created to allow public comments must have the following configurations assigned to it:

- In **Privileges**, select the **Retrieve/View** and **Create** options.
- In **Product Rights**, select the **Web Client** and **HTML Forms** options.

Accessing the Designer

Access the Forms Designer from one of the following locations:

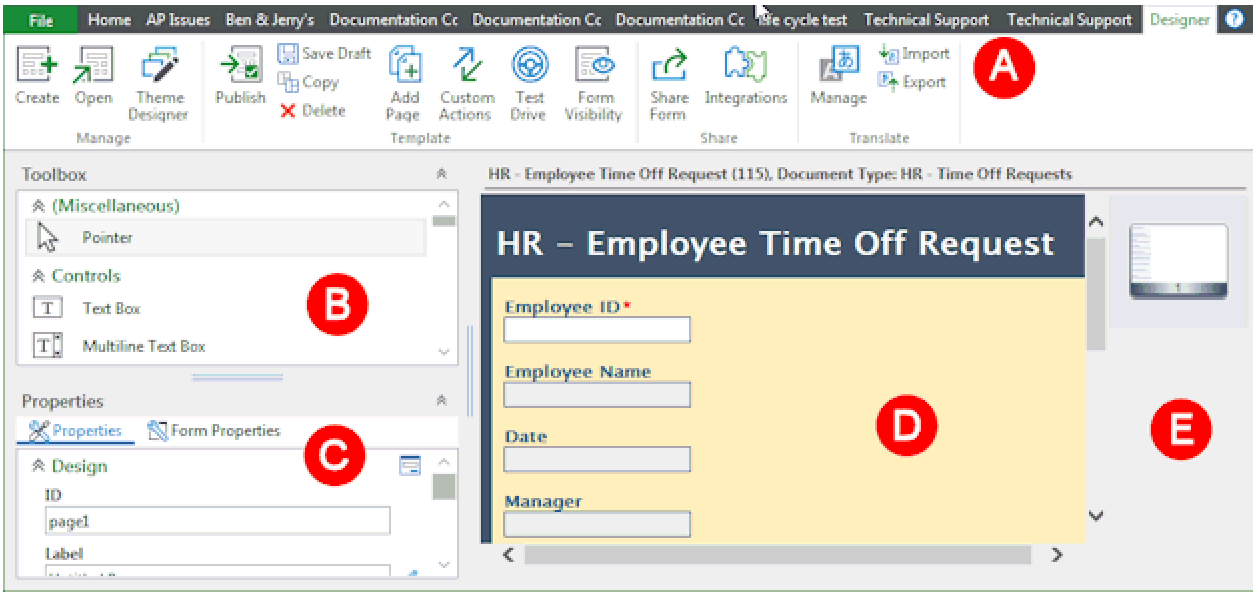
- In the Unity Client, from the **File** tab, select **Administration | Forms Designer**. The **Designer** tab is displayed in the Unity Client.
- In Agenda, from the **File** tab, select **Administration | Forms Designer**. The **Designer** tab is displayed in Agenda.

In order for the Forms Designer option to display in Agenda, you must enable the following option in OnBase Configuration:

- From **Users | User Groups/Rights**, select the user group you want. Click **Product Rights**, then select the **Configuration** check box in the **Configuration** section.
- From **Users | User Groups/Rights**, select the user group you want. Click **Configuration Rights**. Select the **Products** tab, then select the **Forms Designer** check box.

Layout of Forms Designer

The following is the layout of the Forms Designer.



A

The **Designer** ribbon contains the buttons that allow you to accomplish the following actions:

- create a new form template
- open an existing form template
- publish a template
- test drive a template before publishing
- add pages to the template.

In addition to the **Designer** ribbon, a ribbon is displayed for the selected control in the form. In the example, a text box is selected. In this example, this is accessed by clicking on the **Text Box** tab.

B

The **Toolbox** window contains all of the form controls that can be placed on a form. All controls can be added to the form by clicking on the control in the **Toolbox** and then clicking within the design area.

C

The **Properties** window contains the **Properties** and **Form Properties** tabs.

The **Properties** tab contains all of the properties that can define a visual display of a control. Each control has different property options. The **Properties** tab also allows you to customize fields for validation and masking. In addition, field requirements and AutoFill Keyword Sets field configuration can be configured in this tab.

D

The **Design your form** area is the area of the screen where you design the layout of the form. The design area displays the page that is selected in the page pane.

When you are working on a saved draft, **Editing Draft** will display in the header of the design area to designate that you are working on a draft and not a published version of the form.

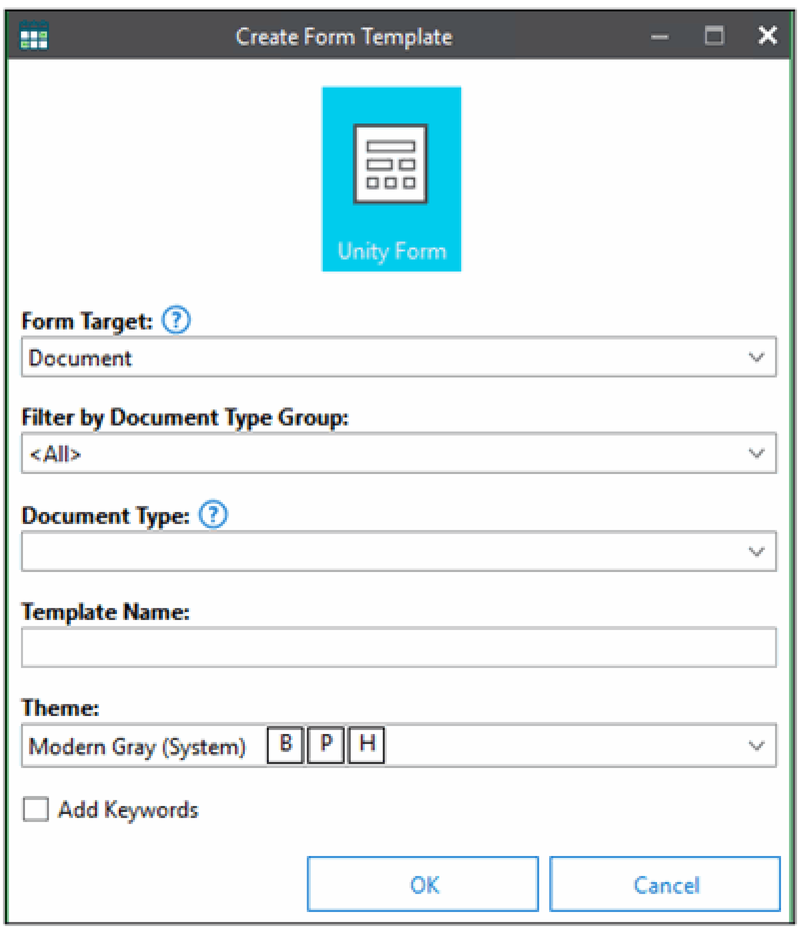
E

The page pane contains all of the pages the form contains.

Creating an Agenda Item Form Template

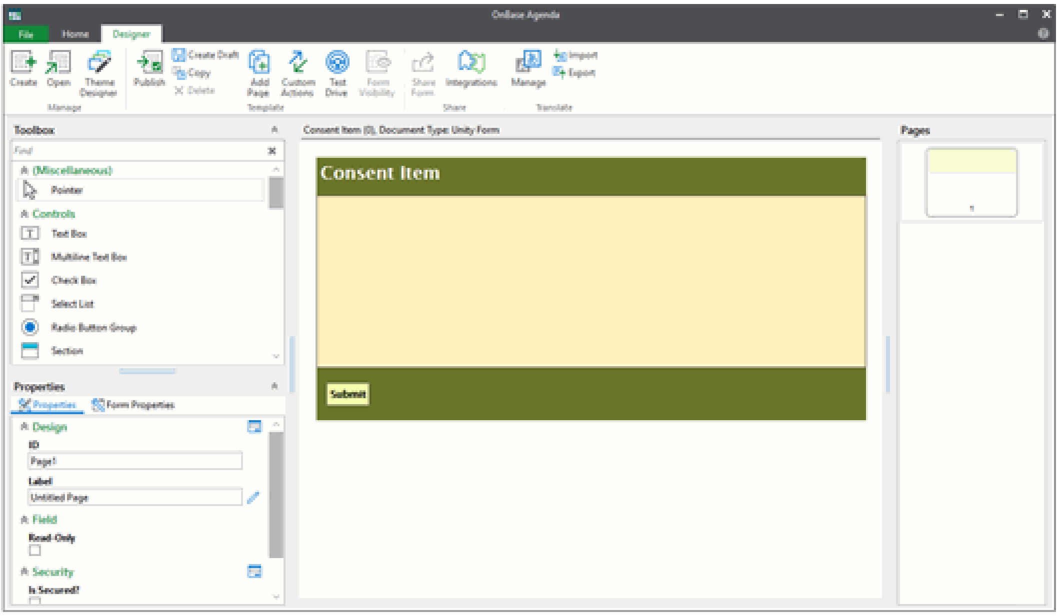
In the **Designer** tab:

1. Click **Create**. The **Create Form Template** dialog is displayed.



2. Select **Agenda Item** from the **Form Target** drop-down list.

3. Select a Document Type from the **Filter by Document Type Group** to narrow the Document Types available for selection.
4. Select the Document Type in which you would like to store the forms that originate from this template from the **Document Type** drop-down list.
5. Enter a name for the template in the **Template Name** field. This field is limited to 60 characters. A value for this field is required.
6. Select a color scheme for the form template from the **Theme** drop-down list.
7. If keywords are available for the template, select the **Add Keywords** check box.
8. Click **OK**. The form you created is displayed. The form is empty unless the **Add Keywords** check box is selected.



Adding Form Controls

Field options are available in the **Toolbox** window. With two simple clicks, form fields can be added to a form. When creating an agenda item form template, you can add any fields you need, but there are three required fields that must be added and configured:

- One Text Box
- Two Select Lists

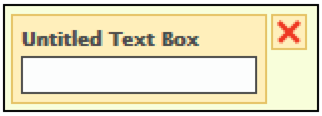
Form controls can be added in one of three ways: Select and Click, Drag and Drop, and Double-

Click.

Select and Click

To add a control to a form:

1. Select the control you want to add in the **Toolbox** window.
2. Move the cursor onto the form. The following is an example of what the cursor with the control will look like when it can be placed onto the form.



3. Click in the form editor in the position you want the control placed.

Drag and Drop

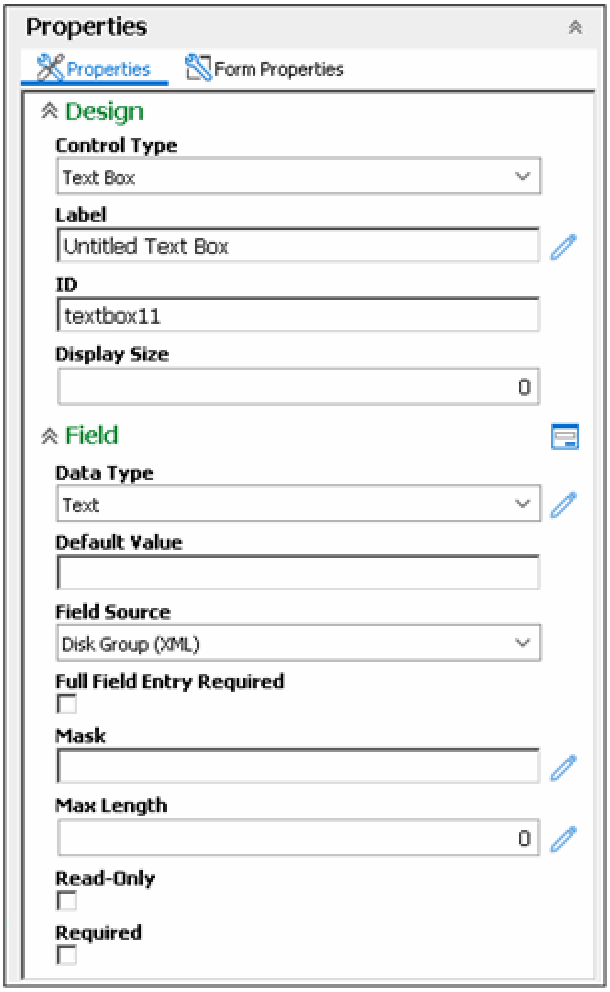
You can add controls to a form by clicking on the control and dragging it to the area of the form you want to place the control. The following is an example of what the cursor will look like when the selected control can be dragged onto the form.

Double-Click

Alternately, you can double-click on the control in the **Toolbox** and the control will automatically be added to the top left corner of the form.

Setting Property Controls

Once you have added the fields you want to the form, you must configure the fields using the property controls available in the **Properties** pane.

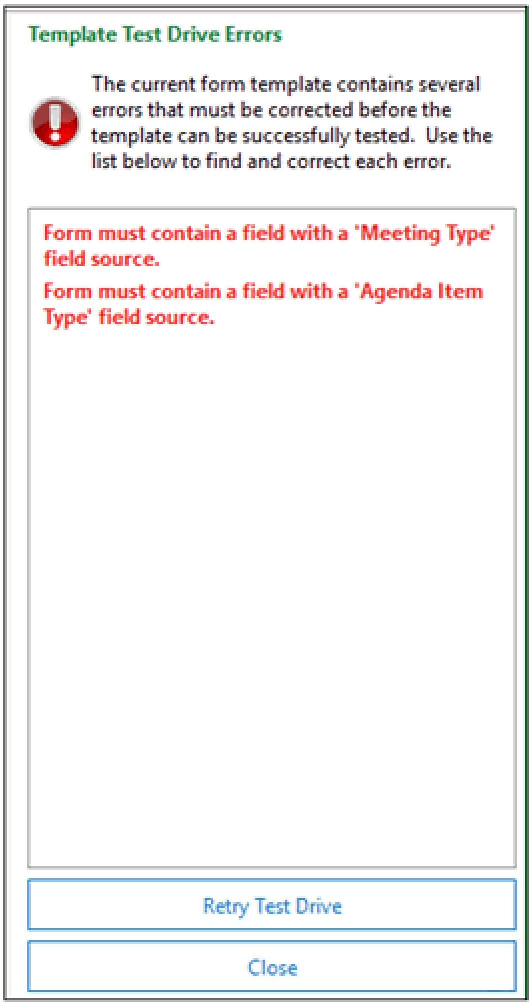


Properties must be set for all fields added to the form, but the following properties must be set for the three **required** fields on an Agenda form template:

- **Text box for the agenda item title**
  - **Label** - Examples include Item Title or Short Item Title.
  - **Control Type**: Text Box
  - **Field Source**: Short Item Title
  - **Required**: By default, this check box is selected. If it is not selected, select this check box to mark this field as required.
- **Select List to select the meeting type**
  - **Label** - Examples include Meeting Type or Type of Meeting
  - **Control Type**: Select List
  - **Field Source**: Meeting Type
  - **Required**: By default, this check box is selected. If it is not selected, select this check box to mark this field as required.
  - **Value Must Exist**: By default, this check box is selected. If it is not selected, select this check box to require that values must exist for this select list.
  - **Allow Original Values**: By default, this check box is selected. If it is not selected, select this check box to require that original values may be allowed.
- **Select List to select the agenda item type**
  - **Label** - Examples include Agenda Item or Agenda Item Type or Item Type
  - **Control Type**: Select List
  - **Field Source**: Agenda Item Type
  - **Required**: By default, this check box is selected. If it is not selected, select this check box to mark this field as required.
  - **Value Must Exist**: By default, this check box is selected. If it is not selected, select this check box to require that values must exist for this select list.
  - **Allow Original Values**: By default, this check box is selected. If it is not selected, select this check box to require that original values may be allowed.

Note: When the field source is selected for the required fields, the **Required** check box is automatically selected.

When all fields have been placed on the form, click **Test Drive** from the ribbon. If the field source value has not been selected, an error message is displayed on the side of the window.



Select the proper field source values from the **Field Source** drop-down list and then click **Retry Test Drive**. When the test drive does not produce any more errors, click **Publish** from the ribbon at the top of the window.

Setting Property Controls for Attachments

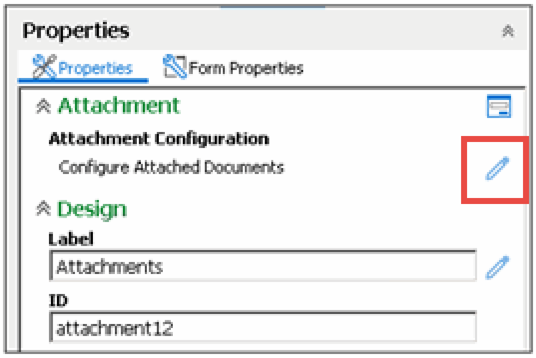
In many cases, supporting documents need to be attached to agenda items. These documents may include cover letters or other supporting documents for the agenda item. The ability to add attachments must be configured on the Agenda Item Unity form template.

Note: Only one attachment control can be added to an Agenda Item type Unity form.

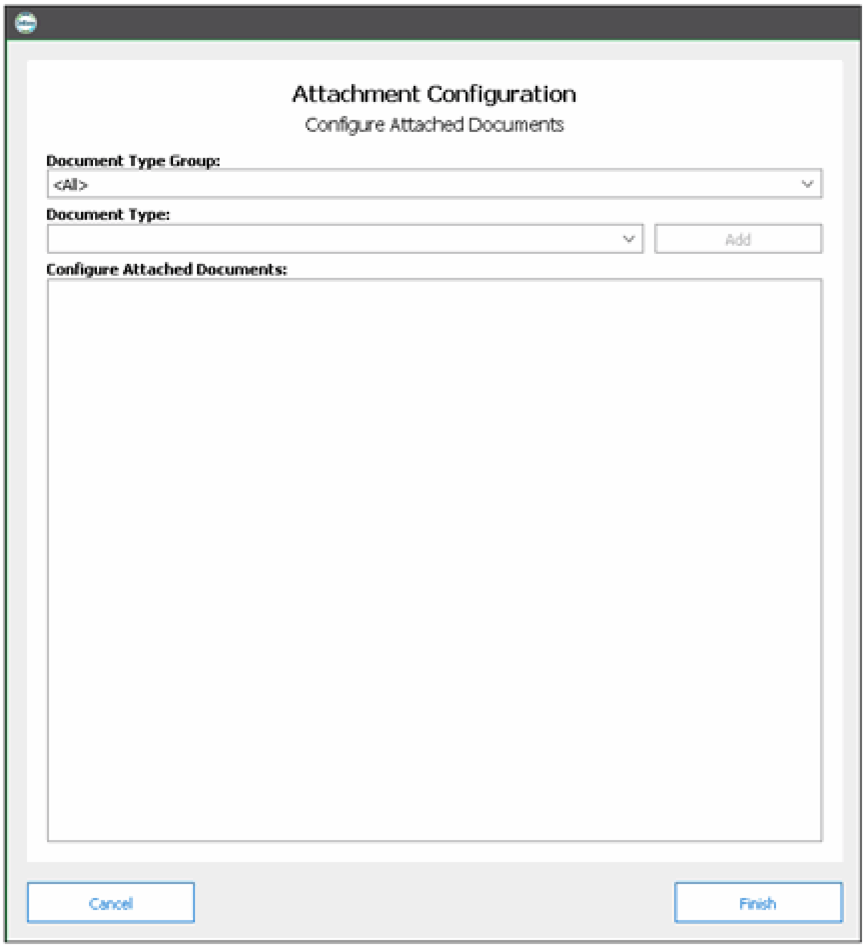
To configure a Unity form for attachments:

1. From the **Toolbox** pane, select the **Attachment** control and place it on your form.

2. Once the control is placed on the form, it must be configured. From the **Properties** pane, select the **Attachment Configuration** icon in the Attachment section.

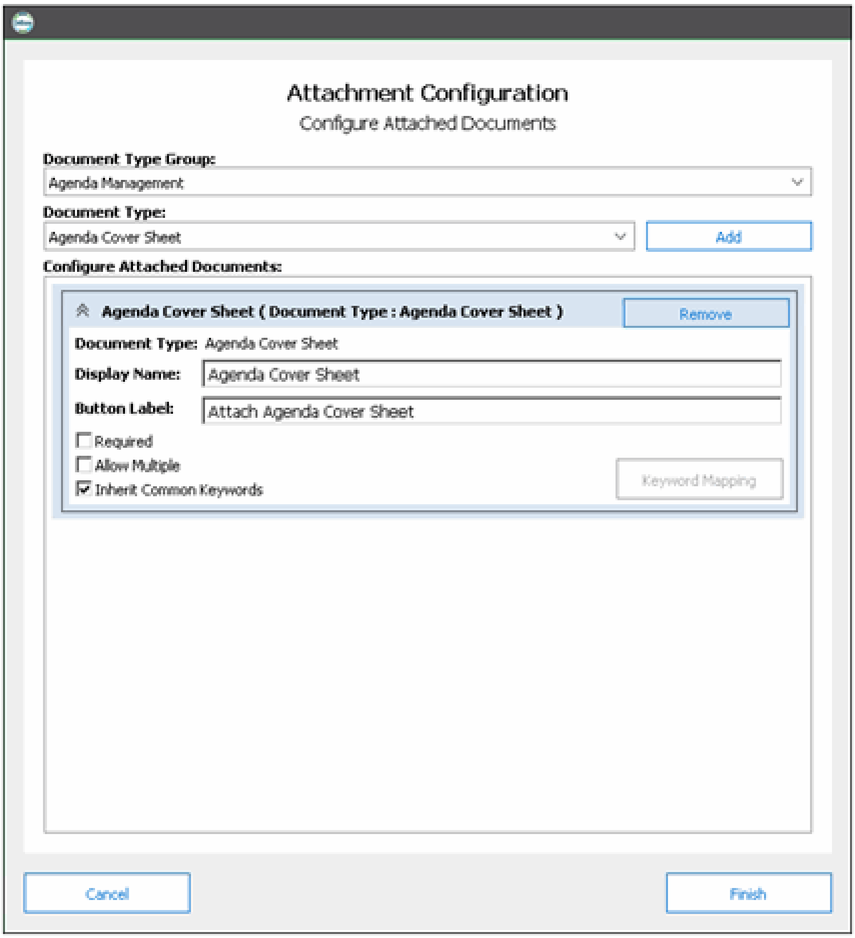


The **Attachment Configuration** dialog box is displayed.



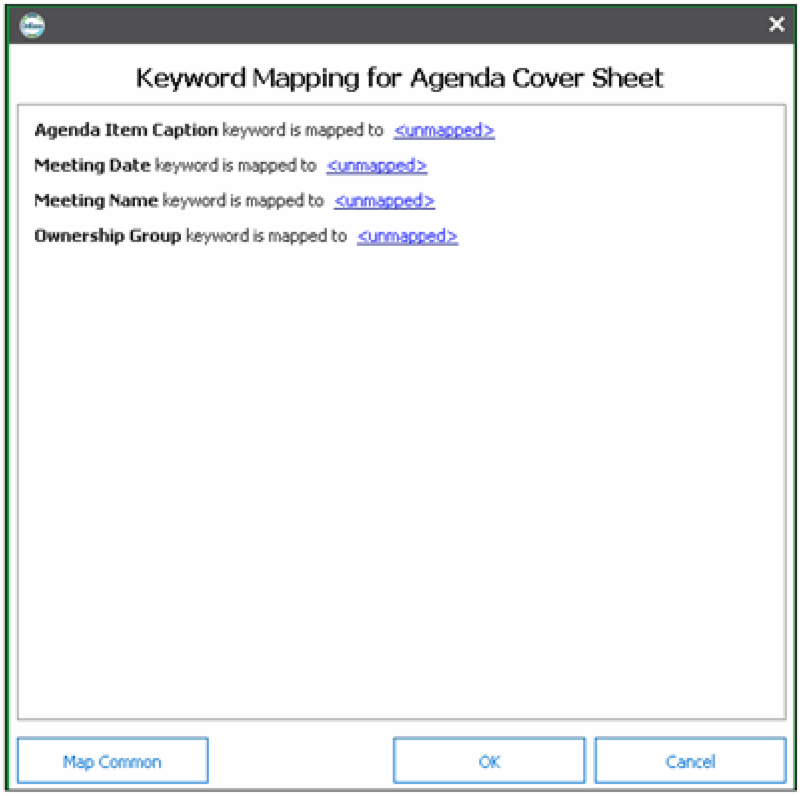
3. From the **Document Type Group** drop-down list, select a group to narrow down the search for a document type.
4. From the **Document Type** drop-down list, select a document type for the attachment.

5. Click **Add**. More configuration information is displayed in the **Configure Attached Documents** section.



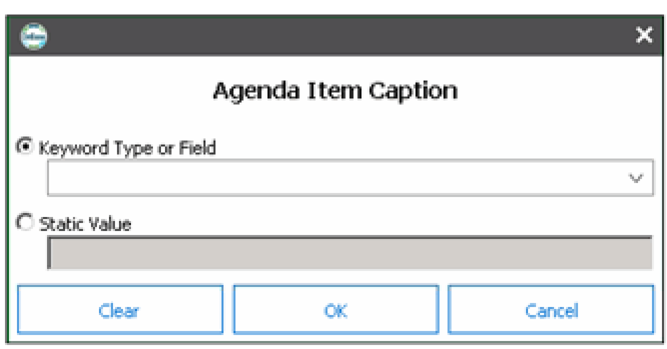
6. In the **Display Name** field, either accept the default value, or enter the display name you want to be displayed on the form.
7. In the **Button Label** field, either accept the default value, or enter the button label name you want to be displayed on the form.
8. Select the **Required** check box if you want to require users to add an attachment to the agenda item.
9. Select the **Allow Multiple** check box if you want to allow users to attach multiple documents.

10. If you have keywords configured for the agenda field items on the form, select the **Inherit Common Keywords** check box. If you do not have keywords configured, de-select the check box, and click the **Keyword Mapping** button. The **Keyword Mapping for <Document Type Name>** dialog box is displayed.

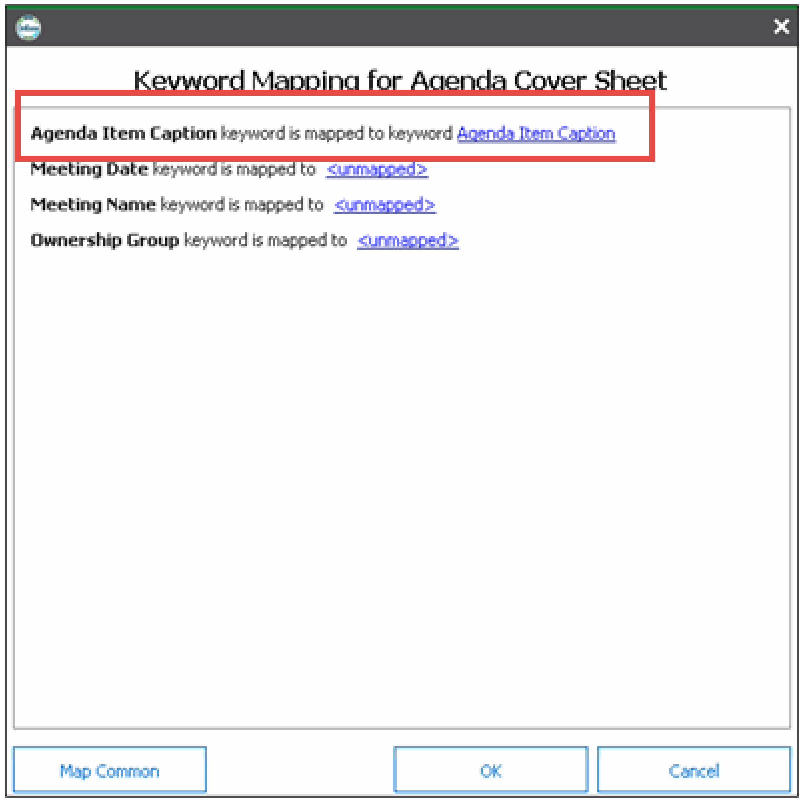


Do the following to map keywords to fields on the Agenda Item form:

- Select the <unmapped> link next to the first field in the list. The **Agenda Item Caption** dialog box is displayed.

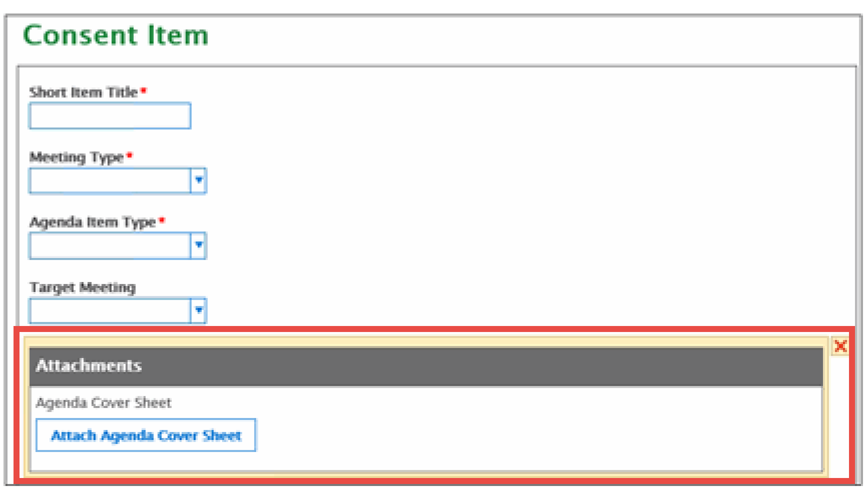


- From the **Keyword Type or Field** drop-down list, select the keyword that matches the field name to which you establishing a link.
- Click **OK**. The keyword value you selected is displayed next to the field name.



- Click **OK** to return to the Attachment Configuration dialog box.

11. Click **Finish**. The Attachment control is fully configured, and is displayed on the Unity form.



Creating a Public Comments Template for Agenda Online

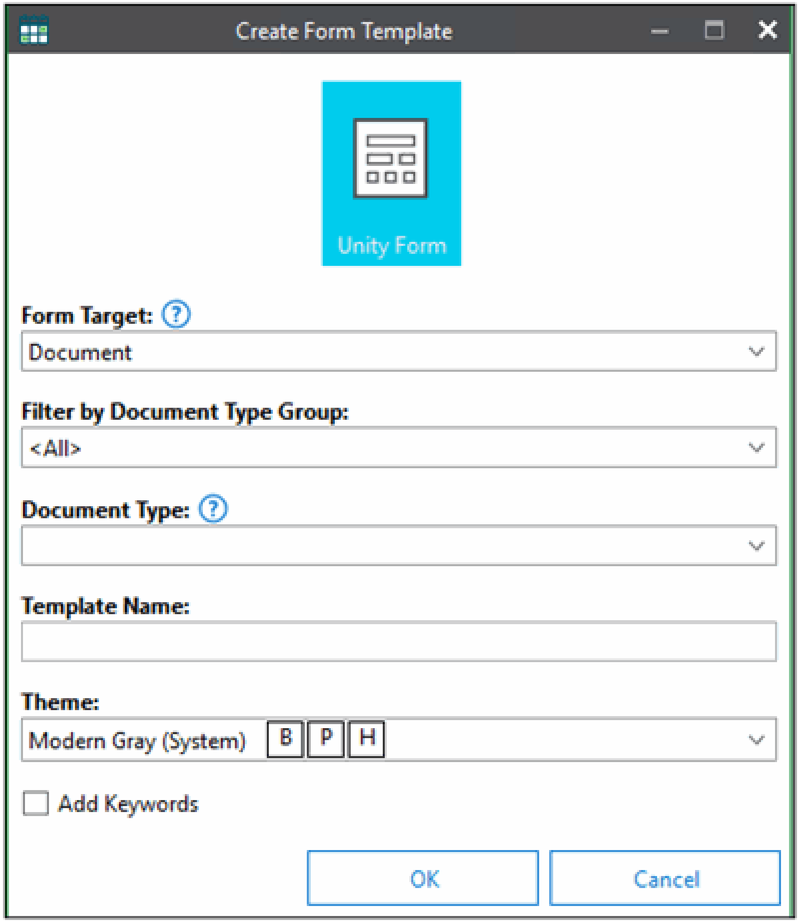
The Public Comments template provides the ability for the public to make comments on agenda items in Agenda Online. Configuration for the commenting form includes the following:

- Creating the Public Comments Template on page 200
- Integrating the Public Comments Form with Agenda Online on page 204
- Sharing the Form for Use with Agenda Online on page 210
- Modifying the Agenda Online Web.config File to Integrate Public Comment Information on page 212

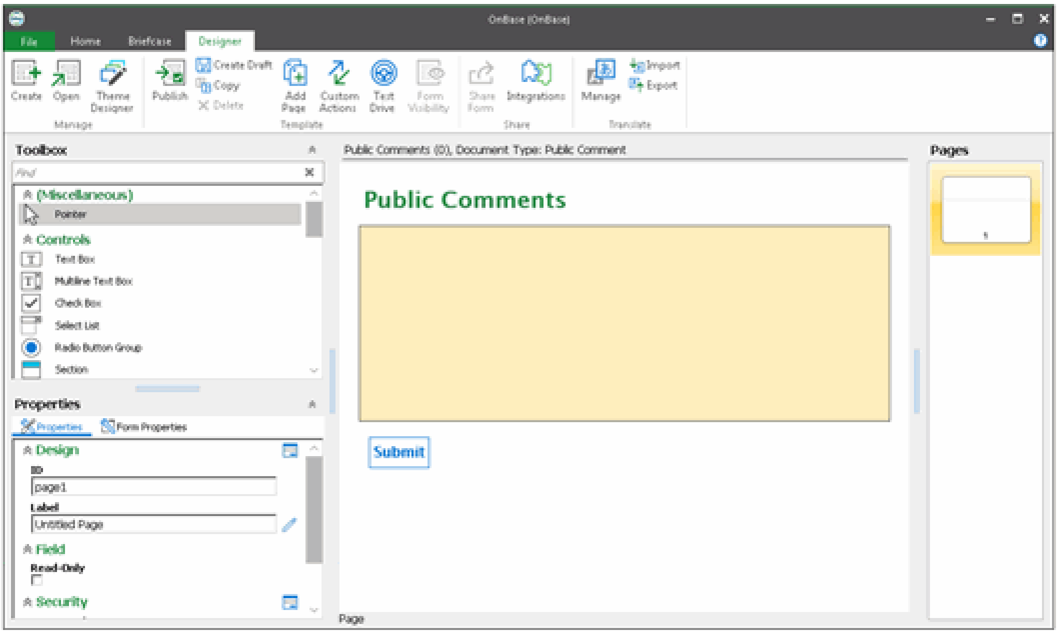
Creating the Public Comments Template

To create a public comments template:

1. Access the Forms Designer. See Accessing the Designer on page 187 for more information.
2. Click **Create** from the **Designer** tab. The **Create Form Template** dialog is displayed.



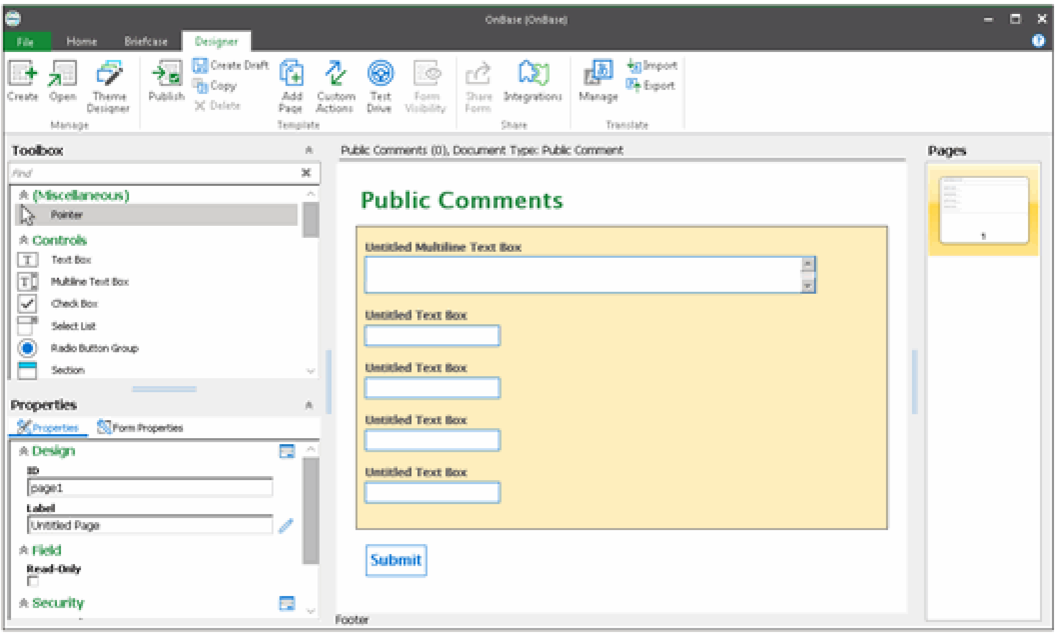
3. Select **Document** from the **Form Target** drop-down list.
4. Select a document type group from the **Filter by Document Type Group** drop-down list to narrow the document types available for selection.
5. Select the document type that was specifically created for commenting (see Configuring Document Types for Agenda Forms on page 184 for more information) from the **Document Type** field.
6. Enter a name for the template in the **Template Name** field. This field is limited to 60 characters. A value for this field is required.
7. Select a color scheme for the form template from the **Theme** drop-down list.
8. If keywords are available for the template, select the **Add Keywords** check box.
9. Click **OK**. The form you created is displayed. The form is empty unless the **Add Keywords** check box is selected.



Adding Form Controls

The form used for commenting must contain a section to enter comments, along with four required fields that identify the meeting for which the comment is made. The fields that need to be added to the form from the Toolbox pane include:

- Multiline Text Box. This will be the text box where comments are entered.
- Four Text Boxes. These are the required text boxes.



Configuring the Multiline Text Box

To configure the Multiline Text Box:

1. Select the Multiline Text Box that has been placed on the form.
2. In the **Properties** tab, enter values in the following fields:
   - **Label**. Enter a name for the text box. This is the name that is displayed on the form. For example, Public Comment.
   - **ID**. Enter an ID for the text box. This ID is used in the Agenda Online web.config file. The ID name is typically the same as the label for the text box. For example, publiccomment.

Note: Be sure to record the ID so you can enter this value in the web.config file for Agenda Online.

Configuring the Required Text Boxes

The required text boxes include:

- **Meeting Name**
- **Meeting Date**
- **Item ID**
- **Item Title**

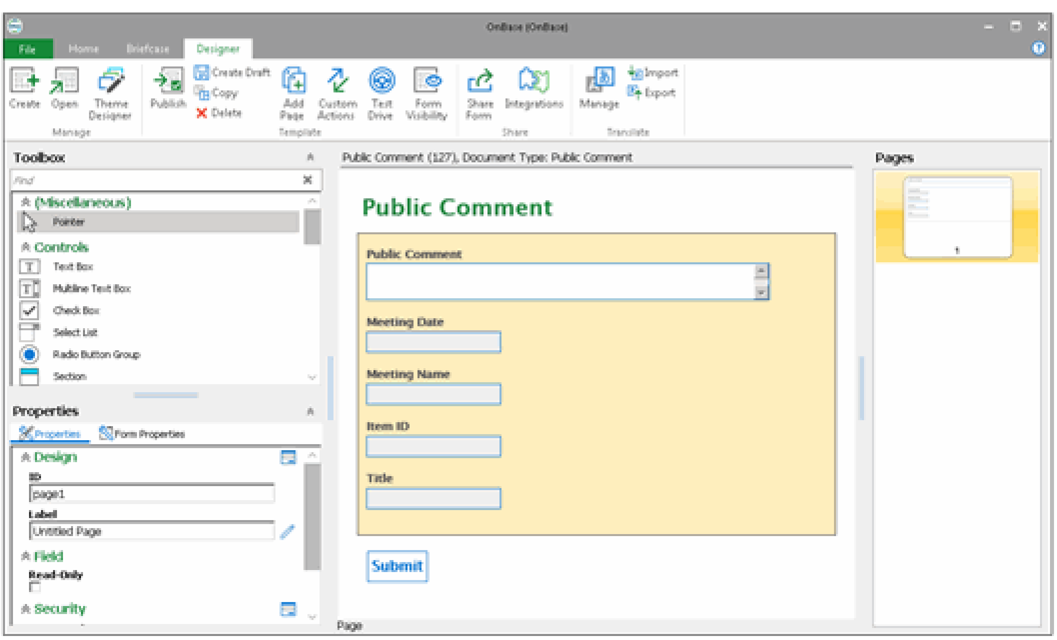
These text boxes are populated with information for the meeting on which you are leaving a comment. These text boxes are marked as read-only.

To configure the required text boxes:

1. Select the first text box that has been placed on the form.
2. In the **Properties** pane, enter values in the following fields:
    - **Label**. Enter one of the required text box names. For example, Meeting Date.
    - **ID**. Enter an ID for the text box. This ID is used in the Agenda Online web.config file. The ID name is typically the same as the label for the text box. For example, meetingdate.

Note: Be sure to record the ID so you can enter this value in the web.config file for Agenda Online.

3. Scroll to the bottom of the **Properties** pane, and select the **Read-Only** check box.
4. Select the next text box. Complete steps 2 and 3 until you have configured the four required text boxes.



Integrating the Public Comments Form with Agenda Online

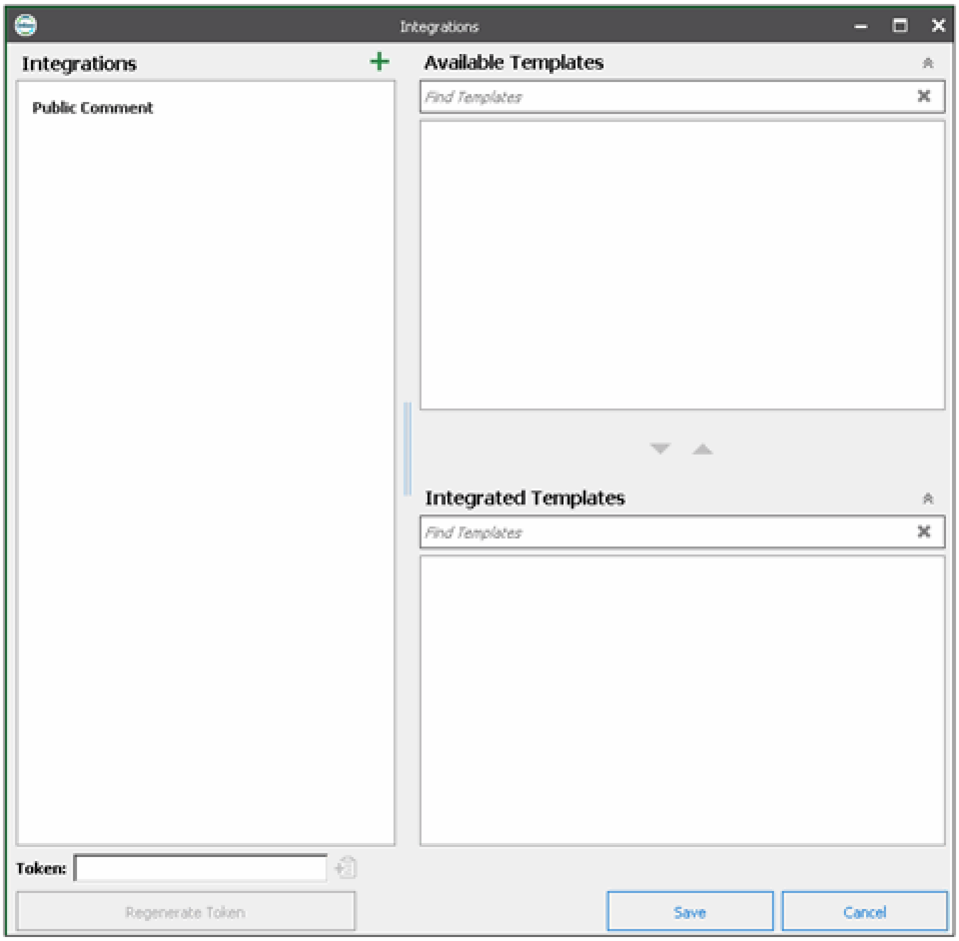
Once the public comment form is created in the Forms Designer, it must be integrated with Agenda Online. This allows the public comment functionality to display in Agenda Online.

Creating the Integration

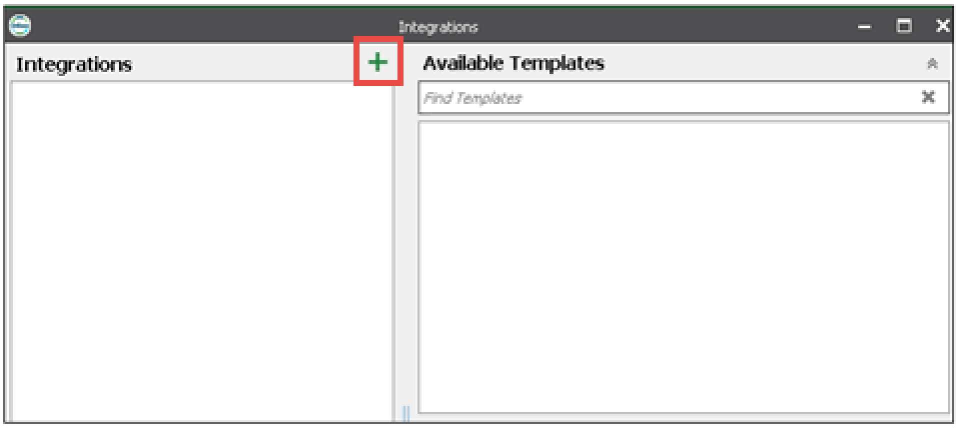
To integrate the public comment form with Agenda Online:

1. From the **Designer** window, open the public comments form you created.
2. From the ribbon bar, select the **Integrations** icon.

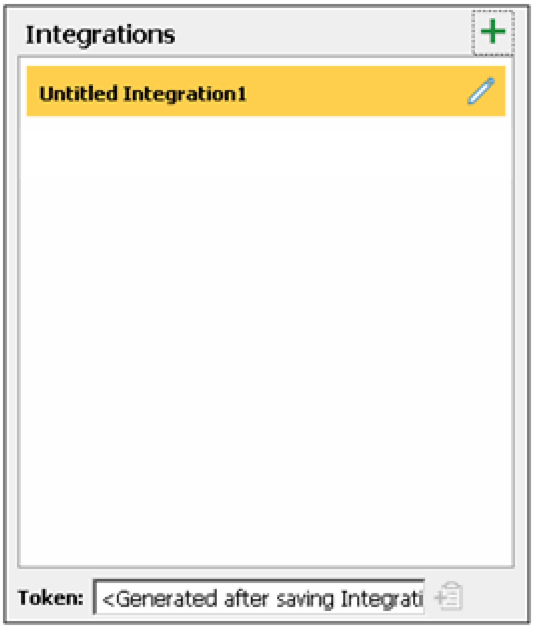
The **Integrations** window is displayed.



3. Click the + icon located above the **Integrations** pane.

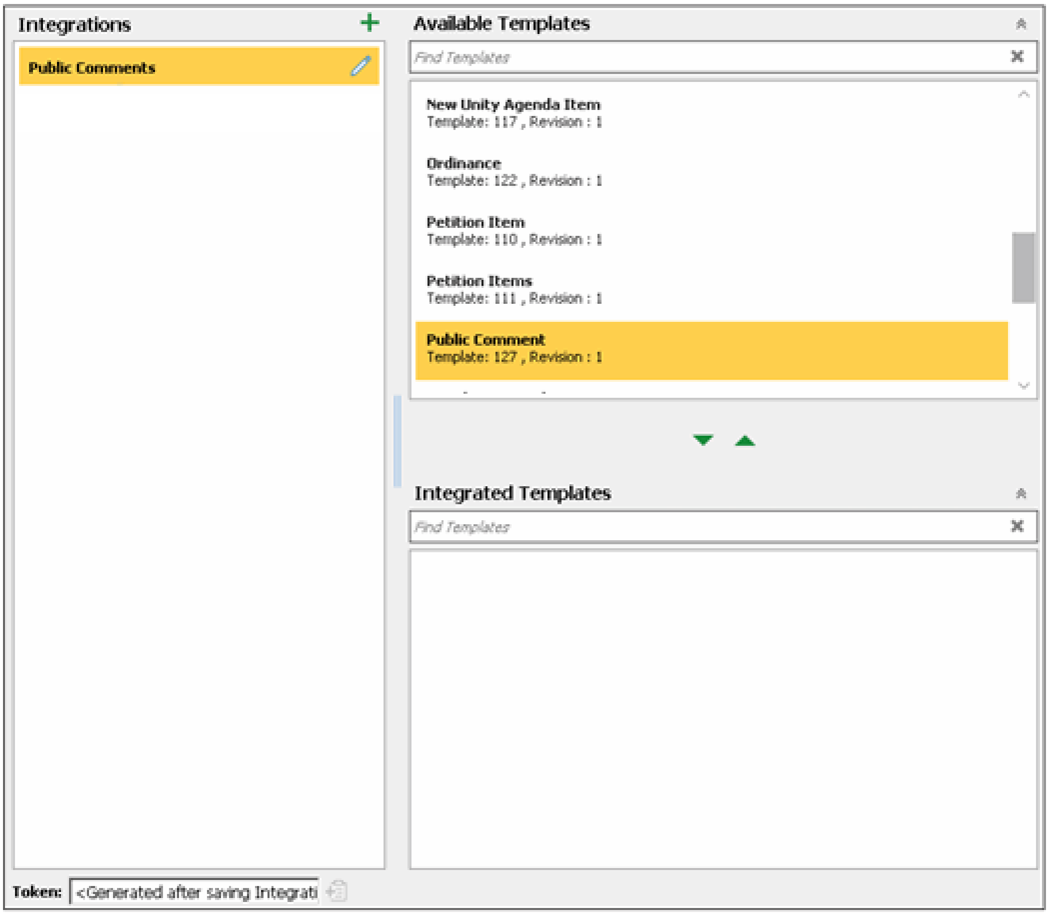


An **Untitled Integration** is displayed in the Integrations pane.

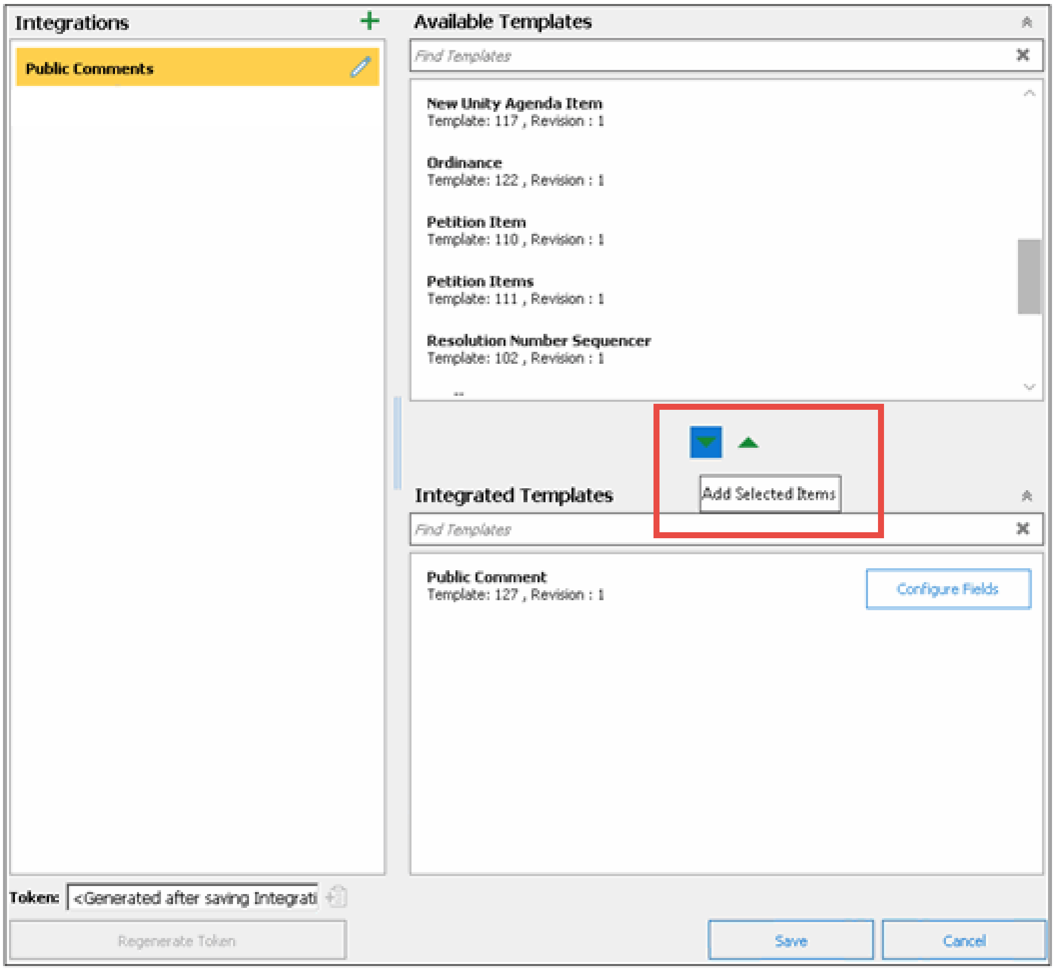


4. Click the **Edit** icon to name the integration something that is easy to remember.

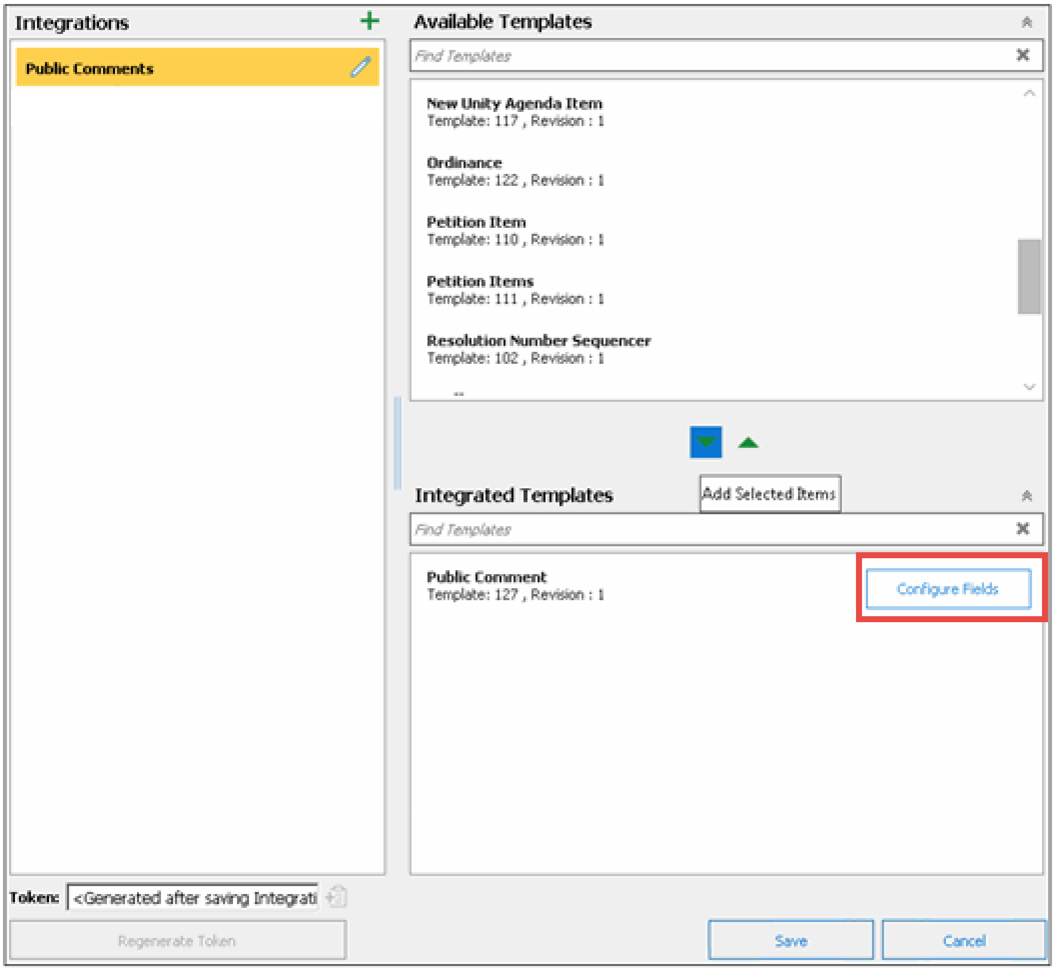
5. Select the public comment form template you created from the **Available Templates** pane.



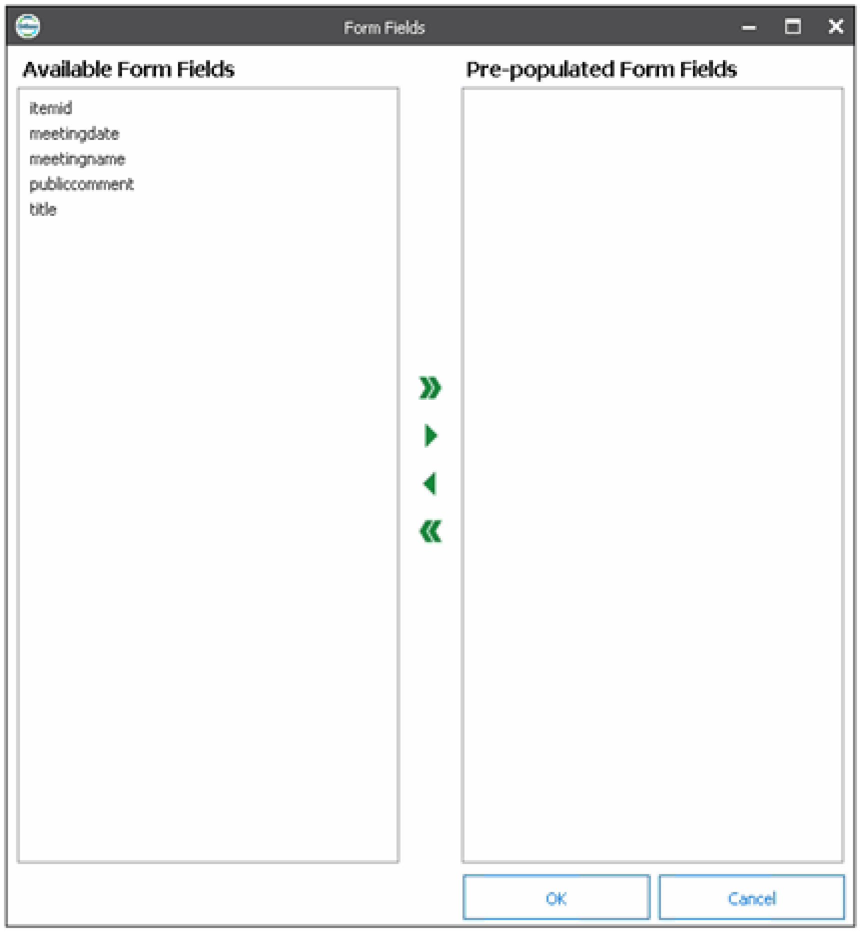
6. Select the **Add Selected Items** icon (green down arrow) to add the template to the **Integrated Templates** pane.



7. Click **Configure Fields**.



The **Form Fields** window is displayed.



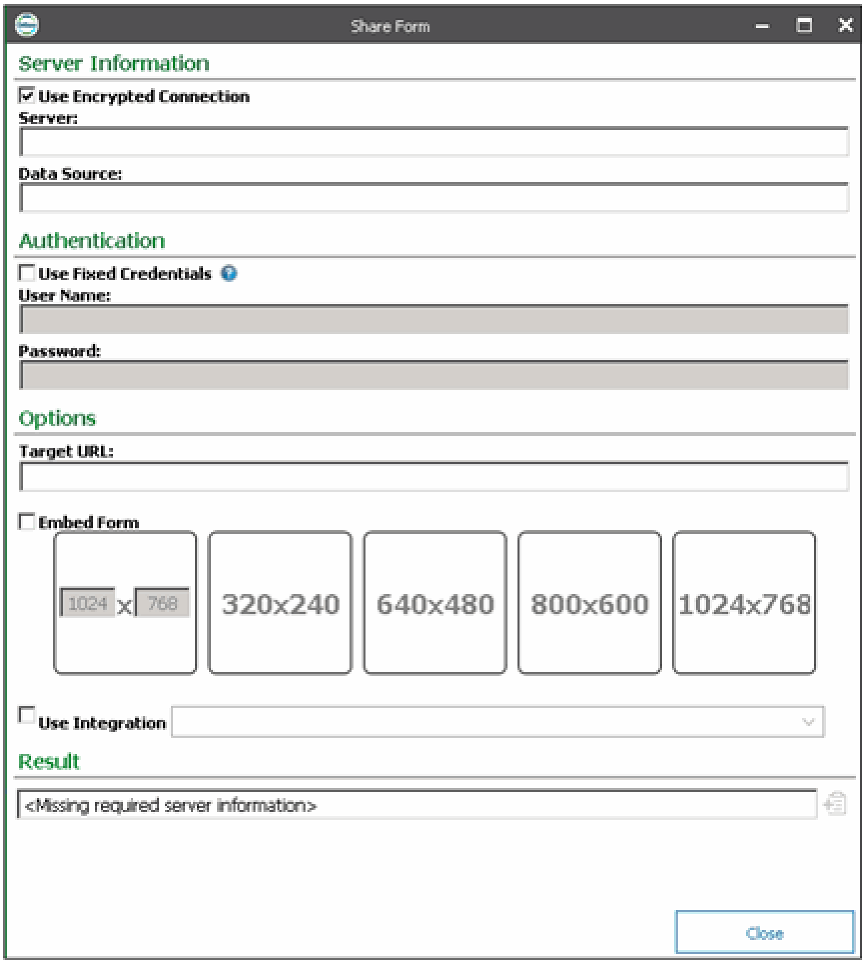
8. From the **Available Form Fields** section, press and hold the **Ctrl** key, and select the following fields:
   - itemid
   - meetingdate
   - meetingname
   - title
9. Click the **Add selected items** icon (right-facing arrow) to add the fields to the **Pre-populated Form Fields** section.
10. Click **OK** to close the Form Fields window.
11. Click **Save**. The Integrations window is closed.

Sharing the Form for Use with Agenda Online

The next step in the integration is to share the form so it can be used with Agenda Online.

To share the form:

1. From the **Designer** window, open the form you want to share.
2. From the ribbon bar, select the **Share Form** icon. The **Share Form** window is displayed.



3. In the **Server** field, enter the URL for the web server configured for your system.
4. In the **Data Source** field, enter the name of the data source configured for your system.
5. Select the **Use Fixed Credentials** check box. The **User Name** and **Password** fields are activated.
6. In the **User Name** and **Password** fields, enter the user credentials for the user that is configured for use with Agenda Online. See Create an Agenda User in OnBase Config on page 53 for more information.
7. In the **Target URL** field, enter the following URL: https://host/OnBaseAgendaOnline/Meetings/CommentSubmitComplete.

Note: Be sure to record the Target URL so you can enter this value in the web.config file for Agenda Online.

8. Select the **Use Integration** check box.

9. From the **Use Integration** drop-down list, select the integration created for commenting.
10. Click **Close**.

Modifying the Agenda Online Web.config File to Integrate Public Comment Information

If you have created a form to allow public comments to be entered in Agenda Online, you must modify the <integrations> section in the web.config file to include the following:

- Integration name, url and token. See Adding the Integration Name, URL and Token to the Web.config File on page 213.
- Meeting type name. See Adding the Meeting Type Name to the Web.config File on page 217.
- Agenda field IDs. Adding the Agenda Form Field IDs to the Web.config File on page 217.

Prior to modifying the web.config file, the <integrations> section will be empty.

```
<Hyland.Applications.AgendaPubAccess.PublicComment>
    <integrations>
        <integration name="" url="" token="">
            <meeting_types>
                <meeting_type name="" />
            </meeting_types>
            <agenda_fields>
                <field name="meeting_name" form_field_id="" />
                <field name="meeting_date" form_field_id="" />
                <field name="item_id" form_field_id="" />
                <field name="item_title" form_field_id="" />
            </agenda_fields>
        </integration>
    </integrations>
</Hyland.Applications.AgendaPubAccess.PublicComment>
```

When all of the information has been added to the <integrations> section in the web.config file, each empty value will have the necessary configurations to allow public comments to work.

```
<Hyland.Applications.AgendaPubAccess.PublicComment>
    <integrations>
        <integration name="Public Comment" url="
        http://srv-kqob/appnet//UnityForm.aspx?d1=AUX2rmBpqkZHxHcn8e17BTjUc4HEDDD0WLI0%2fk1UtDVNeFvDmdEq%
        2br2eVorji00QuFT2v%2fKWxC%2fosmQnfF1mrCciBEkNXNW%2bw5ZChF%2f8%2frkjNBN0wX75NCM9VqAqJSPxSLHourczTi
        wfCChkp8jB6X%2f131iZ3ZzarrzX01hsQCa67AiT3qIrfrBNUpxTye8KuHzNTDyrzWC8P7x%2bzB1xt1%2fd4qty8sjoNSa%2
        bL45qCLiDAy8nBfA0YFnVeH0VayQ0Hw%3d%3d" token="tBQJXieRaSy4eAhIa580Qyyj48fmu43e3S/3hijqDFw=">
            <meeting_types>
                <meeting_type name="City Council" />
            </meeting_types>
            <agenda_fields>
                <field name="meeting_name" form_field_id="meetingname" />
                <field name="meeting_date" form_field_id="meetingdate" />
                <field name="item_id" form_field_id="itemid" />
                <field name="item_title" form_field_id="title" />
            </agenda_fields>
        </integration>
    </integrations>
</Hyland.Applications.AgendaPubAccess.PublicComment>
```

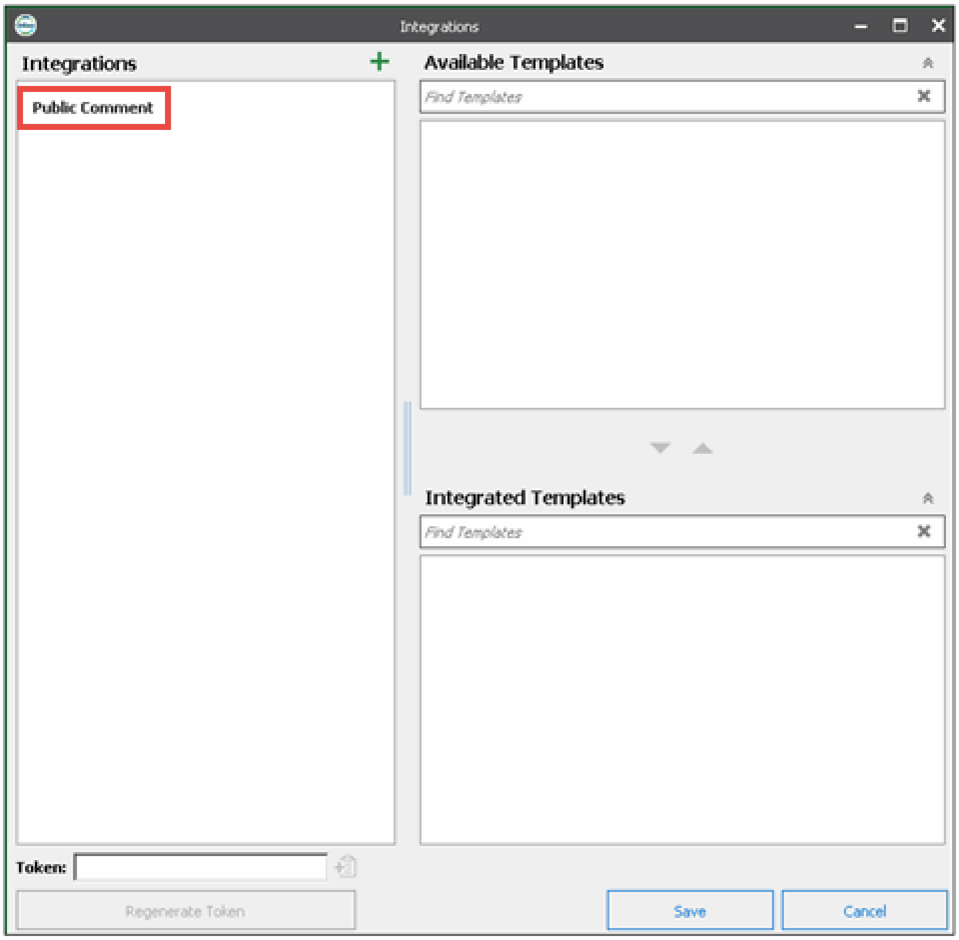
Adding the Integration Name, URL and Token to the Web.config File

During the creation, configuration and sharing of the public comment form, information that was entered during that process must be added to the web.config file for Agenda Online. This information is added to the first line of the <integration> section.

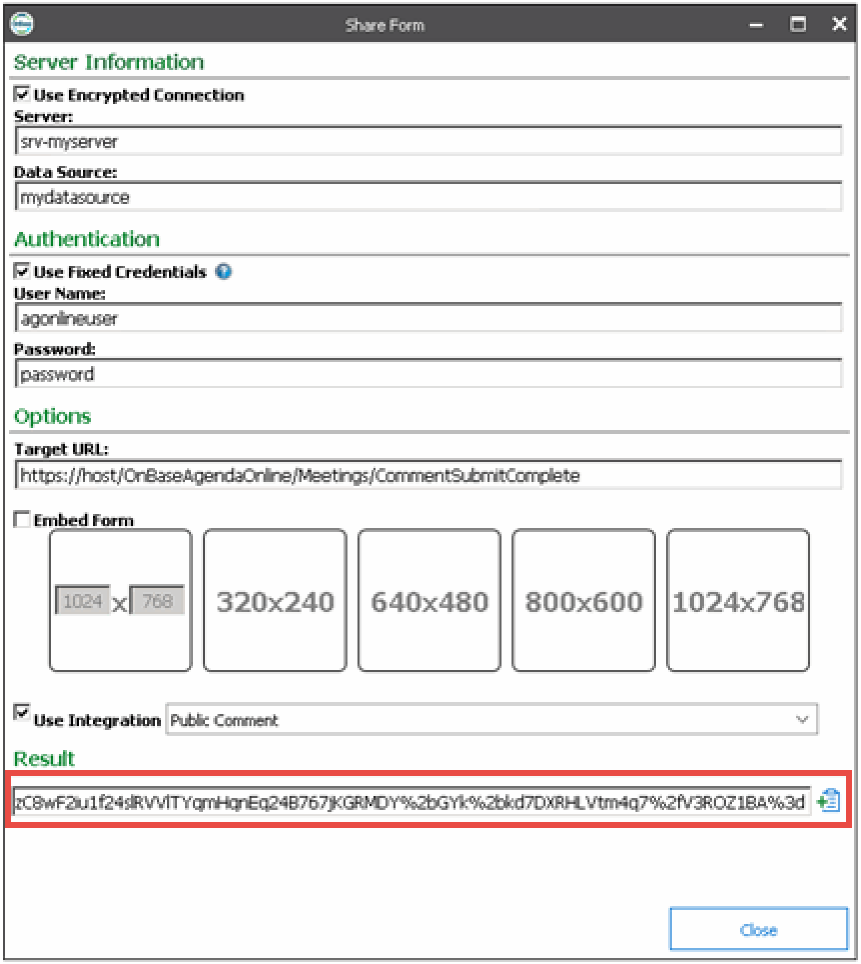
```
<Hyland.Applications.AgendaPubAccess.PublicComment>
    <integrations>
        <integration name="" url="" token="">
            <meeting_types>
                <meeting_type name="" />
            </meeting_types>
            <agenda_fields>
                <field name="meeting_name" form_field_id="" />
                <field name="meeting_date" form_field_id="" />
                <field name="item_id" form_field_id="" />
                <field name="item_title" form_field_id="" />
            </agenda_fields>
        </integration>
    </integrations>
</Hyland.Applications.AgendaPubAccess.PublicComment>
```

This information can be found on the following screens:

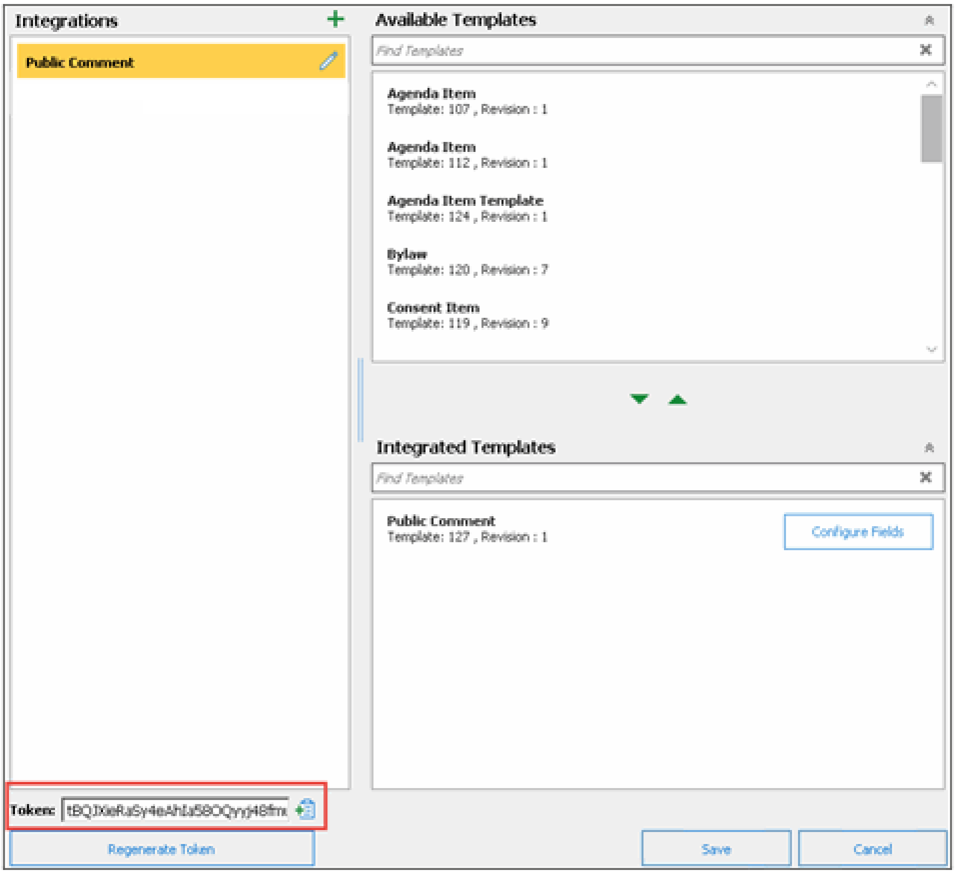
- **Name**. This is the name of the integration that was created when configuring the integration for the public comment option. This is located on the Integrations window. Be sure to enter the name between the quotes (" ") for the **name** value in the web.config file.



- **URL**. This is the URL that is created upon entering information in the fields in the **Share Forms** window. The URL is located in the **Result** section of the window. Select the **Copy** icon next to the field to copy and paste the URL into the web.config file. Be sure to paste this information between the quotes (" ") for the **url** value in the web.config file.



- **Token**. This is the token that is created upon entering information in the **Integrations** window. The toked is displayed on the **Tokens** field on the bottom of the window. Select the **Copy** icon next to the field to copy and paste the token into the web.config file. Be sure to paste this information between the quotes (" ") for the **token** value in the web.config file.



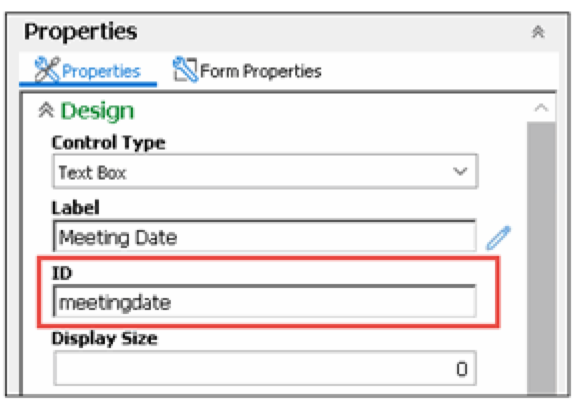
Adding the Meeting Type Name to the Web.config File

You must add the meeting type in the web.config file to which to apply the public comment. This meeting type must match the meeting type name in Agenda. Be sure to enter the name between the quotes (" ") for the <meeting_type **name=" " />** value in the web.config file.

```
<Hyland.Applications.AgendaPubAccess.PublicComment>
    <integrations>
        <integration name="" url="" token="">
            <meeting_types>
                <meeting_type name="" />
            </meeting_types>
            <agenda_fields>
                <field name="meeting_name" form_field_id="" />
                <field name="meeting_date" form_field_id="" />
                <field name="item_id" form_field_id="" />
                <field name="item_title" form_field_id="" />
            </agenda_fields>
        </integration>
    </integrations>
</Hyland.Applications.AgendaPubAccess.PublicComment>
```

Adding the Agenda Form Field IDs to the Web.config File

The agenda form field IDs that were configured during creation of the public comment form must be added to the web.config file. The IDs can be located in the **Properties** tab on the public comments form in the **Designer** window.



Each of the required field IDs must be entered in the web.config file.

```
<Hyland.Applications.AgendaPubAccess.PublicComment>
    <integrations>
        <integration name="" url="" token="">
            <meeting_types>
                <meeting_type name="" />
            </meeting_types>
            <agenda_fields>
                <field name="meeting_name" form_field_id="" />
                <field name="meeting_date" form_field_id="" />
                <field name="item_id" form_field_id="" />
                <field name="item_title" form_field_id="" />
            </agenda_fields>
        </integration>
    </integrations>
</Hyland.Applications.AgendaPubAccess.PublicComment>
```

Enter each form field ID between the quotes (" ") for each field name.

When all of the configurations have been entered into the web.config file, click **Save**.

Field Controls and Properties

You can also add and set properties for any other fields you want to display on your form. See the **Unity Forms** manual reference guide for more information.

OnBase Foundation EP5

Agenda

User Guide

Usage

Agenda is intended for use before and after meetings.

Before a meeting, users can:

- Create a meeting instance where the entire meeting process will be managed
- Add and arrange agenda items and supporting documents
- Generate the agenda document and meeting packet
- Publish Agenda, Summary and Minutes documents to Agenda Online.

After the meeting, users can:

- Finish recording any information from the meeting
- Modify Minutes, Notes, Actions, Motions and Votes
- Generate the minutes document
- Make changes to the agenda or supporting documents, if necessary, and re-generate the agenda document or meeting packet

Definitions

The following terms are associated with the Agenda module, and will be used throughout the documentation:

Term	Definition
Accessible View	Used in the Agenda Online portal. Provides the ability for the use of a document reader to aid in reading documents.
Agenda	A list of items discussed at a meeting.
Agenda Document	A document generated from a meeting instance that typically shows the outline of the meeting, and the agenda items in the outline. It does not include any of the supporting documents for the agenda items.
Agenda Document Template	Used to specify the layout of an agenda document.
Agenda Item	A specific issue, legislative action or topic that will be discussed and/or acted upon during a meeting.
Agenda Item Field	A part of an agenda item. Used for entry of information related to the agenda item.

Term	Definition
Agenda Item Packet	A document generated from an agenda item that is a collection of the agenda item's supporting documents.
Agenda Item Packet Template	Used to specify the layout of an agenda item packet.
Agenda Item Type	Used to classify individual agenda items.
Agenda Online	The online portal that allows the public to view generated agenda, minutes and summary documents.
Agenda Outline Template	Used to specify the layout of an agenda. Agenda outline templates consist of agenda sections.
Agenda Packet	See Meeting Packet.
Agenda Section	A part of an agenda. Agenda sections are used to organize agenda items.
Closed Session	An agenda section or agenda item that is closed to the public.
Meeting	A formally arranged gathering between members of a meeting body.
Meeting Body	A group of members.
Meeting Instance	An occurrence of a meeting type.
Meeting Packet	A document generated from a meeting instance that typically starts with the agenda document and contains all of the agenda item supporting documents. The meeting packet is distributed to the meeting body members, so that they have access to all the information related to agenda items that will be discussed and acted on at the meeting.
Meeting Packet Template	Used to specify the layout of a meeting packet.
Meeting Type	The type of meeting held by a meeting body.
Member	A person that is part of a meeting body.
Minutes	The official record of the proceedings at a meeting.
Minutes Document	A generated document containing the minutes of a meeting.
Minutes Template	Used to specify the layout of a minutes document.
Pending Agenda Item	An agenda item that has been created, but has not yet been added to the agenda. It may or may not be added to the agenda.
Role	The position in a meeting body held by a member.

Term	Definition
Standard View	Used in the Agenda Online portal. This is the basic view that allows users to view meetings and meeting documents.
Summary Document	A generated document that provides a summary of the motions and votes taken during a meeting.
Supporting Document	A document that supports an agenda item.

Logging On

To launch Agenda, double-click the **Agenda** desktop icon or select **Start | Hyland | OnBase Agenda**

After you launch the module, the login dialog box is displayed.

1. Enter the required information:

Field	Description
System	Select the data source to connect to from the drop-down list. **Note:** The **System** field is only displayed when multiple data sources are available.
User Name	Type your OnBase user name.
Password	Type your OnBase password.

2. Depending on your configuration and the module being used, the **Remember me on this computer** option may be displayed. Select this option to store your login credentials. The OnBase user name and password you provide will be used for subsequent login attempts.

Note: If you store your login credentials using the **Remember me on this computer** option, you can clear these stored credentials by selecting **File | Log Out**. You will be required to provide your OnBase user name and password the next time you log in.

3. Click **Login** to log in or click **Cancel** to close the dialog box without logging in.

Note: If the Application Server that you are connecting to is initializing, an initializing message is displayed until the Application Server is ready:

4. If any **System Notifications** are available, they are displayed after logging in. The **Effective Date** is shown above each message. Click **OK** when you are finished viewing the notifications.

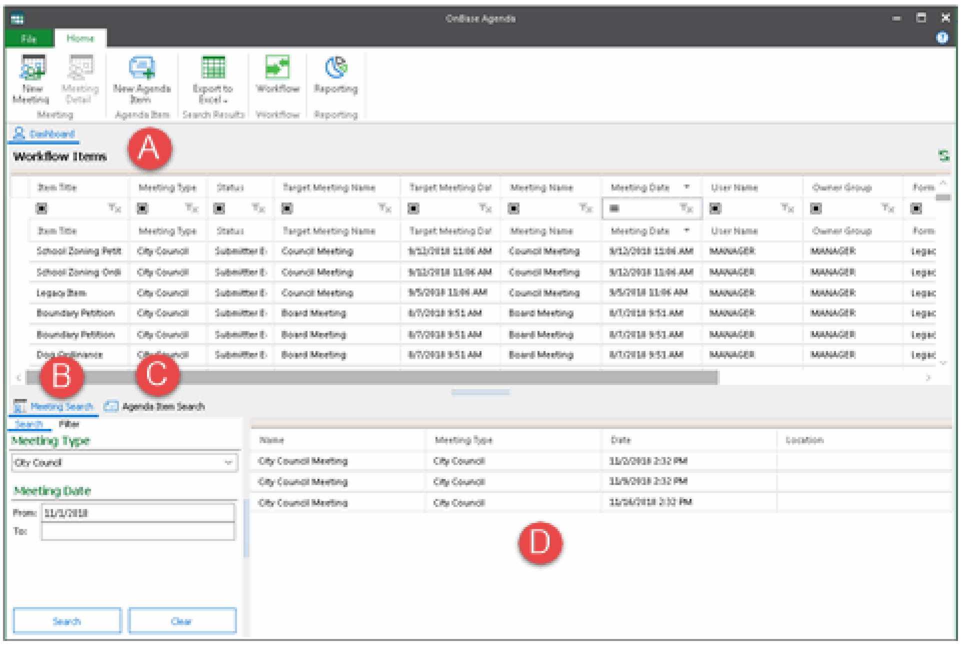
After logging in to OnBase, these same login credentials may be reused when opening subsequent Unity-based modules. This allows you to move between modules without needing to log in additional times. When the same login credentials are being reused, the OnBase login dialog box is displayed and you are automatically logged in.

Note: Login credentials are only reused when Unity-based modules share the same service path and data source configuration.

5. You are logged on to Agenda.

Navigating Agenda

After successfully logging on to Agenda, the **Dashboard** tab displays. The Dashboard is divided into five distinct sections, as described below:



c. The **Workflow Items** pane displays a list of agenda items that are currently in Workflow and that you have permission to view - for example, agenda items that you have created, or that are awaiting your review. For more information, see Viewing Agenda Items in the Workflow Items Pane on page 247.
d. The **Meeting Search** tab allows you to search for one or more meetings that have already been created. Meetings that match your search criteria will be displayed in the **Meeting List** pane. You can also filter the list of meetings being displayed by date or by Meeting Type. For more information, see Retrieving Meetings on page 260.
e. The **Agenda Item Search** tab allows you to search for one or more agenda items that have already been created. For more information, see Searching for Agenda Items on page 244.
f. The **Meeting List** pane displays a list of meetings or agenda items based on the search criteria entered in the **Meeting Search** or **Agenda Search** tab. For more information, see Viewing Meetings from the Meeting List on page 263.

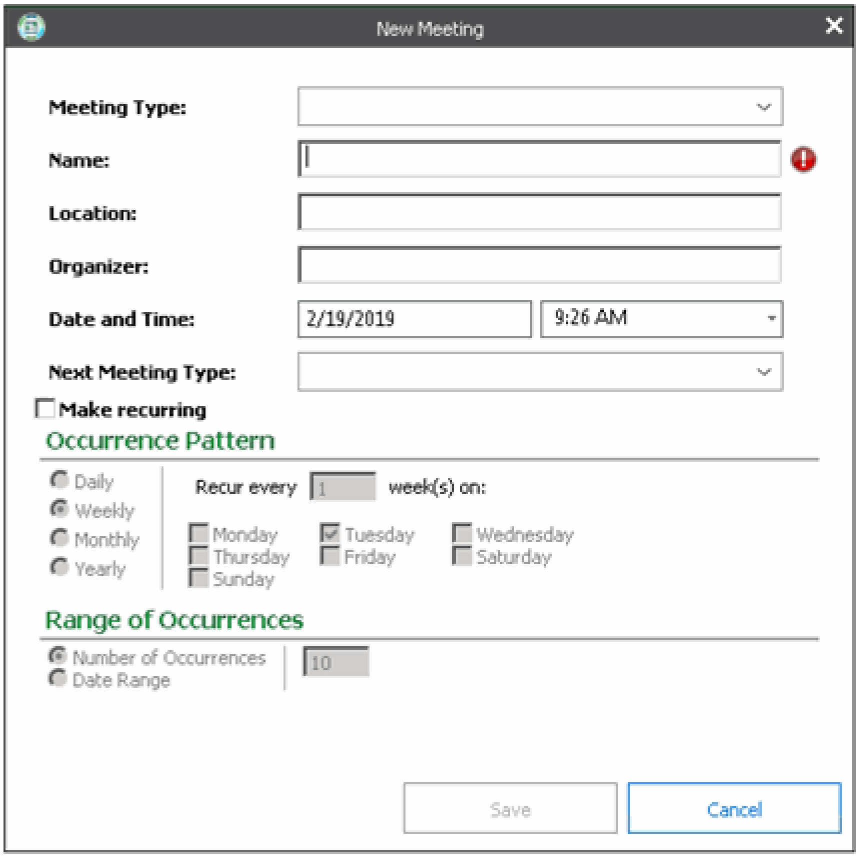
You can return to the dashboard at any time by clicking the **Dashboard** tab.

Creating Meetings

Meeting instances can be created from the **Home** tab.

To create a meeting:

1. Click **New Meeting**. The **New Meeting** window is displayed:



2. Specify the following:

New Meeting	Description
Meeting Type	Select the meeting type from the drop-down list. **Note:** If default values have been configured for the selected meeting type, those values are displayed in the fields. You can modify the values as needed.
Name	Type a name for the meeting.
Location	Type the location of the meeting.
Organizer	Type the name of the meeting's organizer.
Date and Time	Select a date for the meeting from the calendar drop-down list. Select a time for the meeting from the time drop-down list, or manually specify an hour, minute, and AM/PM value.

New Meeting	Description
Next Meeting Type	Select the meeting type for the next meeting from the drop-down list. This field defaults to the value selected in the Meeting Type drop-down, but you can change it if needed. The meeting type you selected is placed in the agenda document in order to notify constituents of the next meeting type. **Note:** If a user does not have View rights for specific meetings, those meetings do not display in the Next Meeting Type drop-down list. If a meeting type is deleted, it is removed from any agenda documents and "Meeting type not found" displays.

3. Do one of the following:
   - If you will be creating a recurring meeting, proceed to step 4.
   - If you will not be creating a recurring meeting, click **Save**.
4. Select **Make recurring** to create a recurring meeting.
5. In **Occurrence Pattern**, specify the following:

Occurrence Pattern	Description
Daily	The meeting will occur daily. Select from the following: • **Recur every [number of days] day(s)** - The meeting will occur every specified number of days. • **Every weekday** - The meeting will occur every weekday.
Weekly	The meeting will occur weekly. Specify how often the meeting will occur in the **Recur every [number of weeks] week(s) on** field. Select which day(s) of the week the meeting should occur on.
Monthly	The meeting will occur monthly. Specify how often the meeting will occur in the **Recur every [number of months] month(s)** on field. Select from the following: • **Day** - Specify the specific day of the month. • **The [instance of day] [day of the week]** - Specify a specific instance of a day of the month. For example, the first Wednesday.

Occurrence Pattern	Description
Yearly	The meeting will occur yearly. Specify how often the meeting will occur in the **Recur every [number of years] year(s)** on field. Select from the following: • **On [month] [date]** - Specify the month and specific day of the month. For example, July 20. • **On the [instance of day] [day of the week] of [Month]** - Specify a specific instance of a day in a month. For example, the first Wednesday of July.

6. In **Range of Occurrences**, specify the following:

Range of Occurrences	Description
Number of Occurrences	Select to specify the number of times the meeting will occur. Specify the number of times the meeting will occur in the corresponding field.
Date Range	Select to specify a specific range of dates for the meetings to occur. Select a **Start Date** and **End Date**.

7. Click **Save**.

After creating a meeting, the meeting displays in the **Meeting List** pane, which is available from the **Meeting Search** tab on the **Dashboard**. Once a meeting has been created, it can be filled with agenda items and supporting documentation.

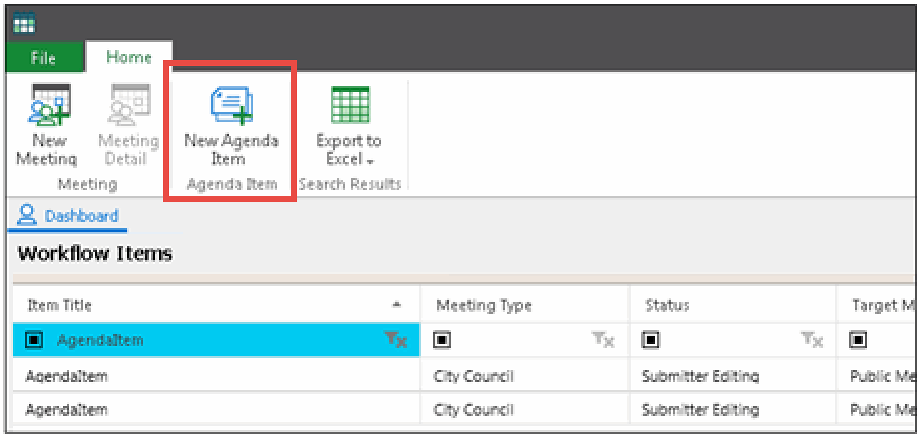
Creating New Agenda Items

Agenda items assigned to meetings are created from:

- Agenda Item Unity form templates. See Agenda Unity Form Configuration on page 184 for information on creating and configuring an Agenda Item Unity form.
- Legacy forms.

Note: The Legacy form is being phased out and replaced with the Unity form. If you no longer have Legacy forms in your system, you will not have the ability to create Legacy agenda items.

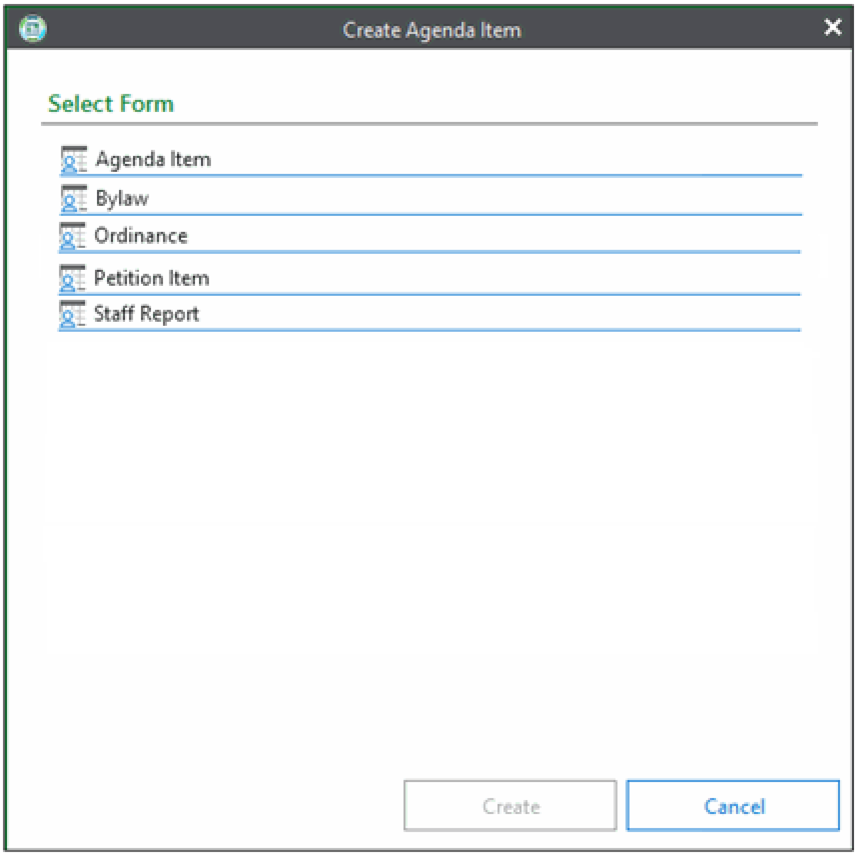
To create a new agenda item, from the main Agenda window, select **New Agenda Item**.



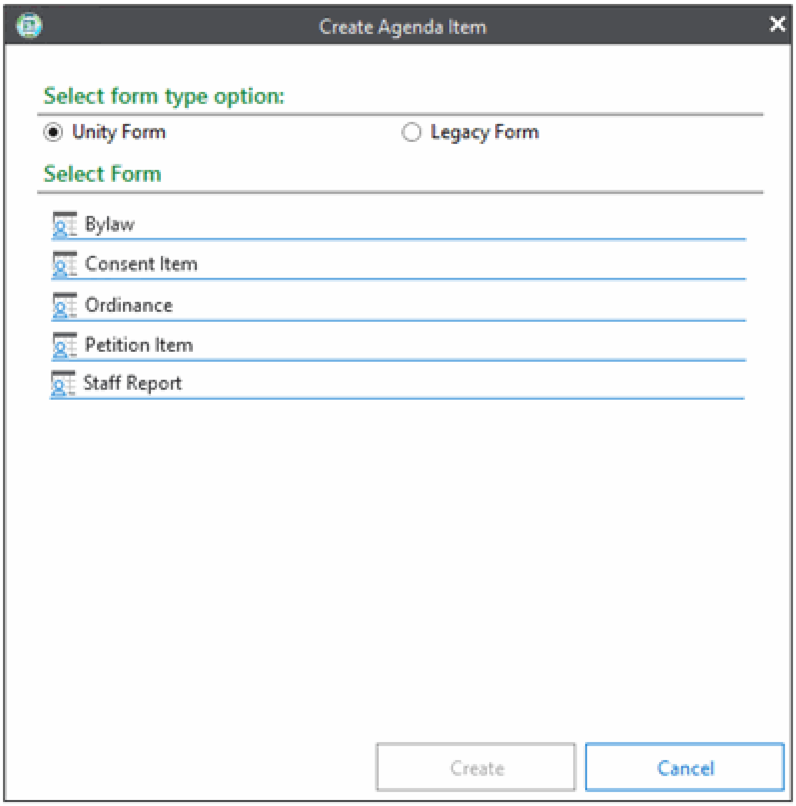
Note: The **New Agenda Item** icon is enabled only if you have Administrator or Create Agenda Item privileges. See Setting Security Options on page 102 for more information.

The **Create Agenda Item** dialog box is displayed. Depending on if you have Unity forms only, or Unity and Legacy forms in your system, you will see one of the following:

- Unity Form only



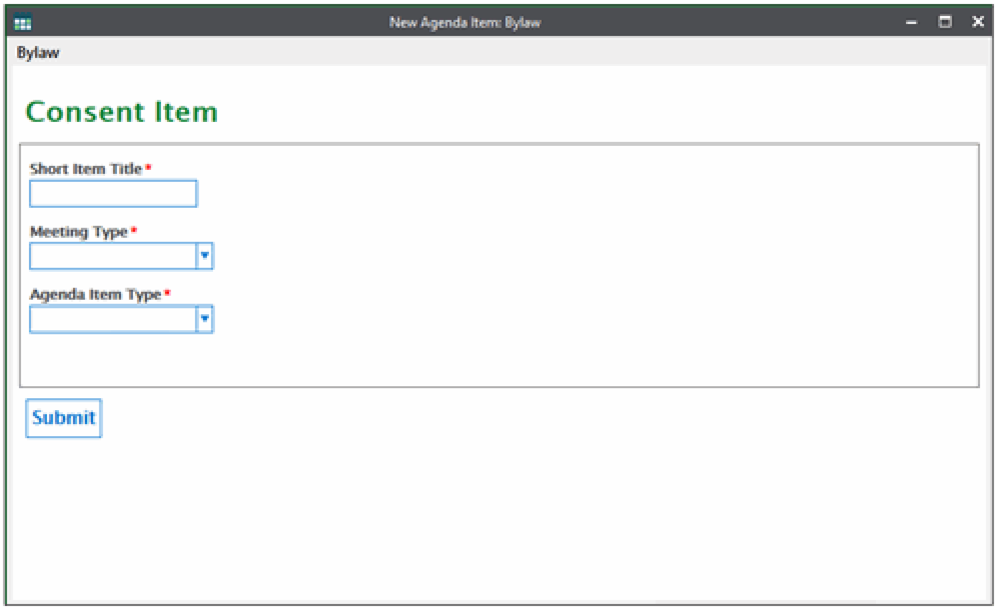
- Unity and Legacy forms


Create Agenda Item
Select form type option:
Unity Form
Legacy Form
Select Form
Bylaw
Consent Item
Ordinance
Petition Item
Staff Report
Create
Cancel

Creating an Agenda Item from a Unity Form

To create an agenda item from a Unity form:

1. Ensure that the **Unity Form** option is selected in the **Create Agenda Item** dialog box.
2. Select the template you want and then click **Create**. The Unity form for the template you selected is displayed.



Note: The fields shown on this form may differ depending on which fields were added to the form when it was created.

3. Fill out the form as needed and click **Submit**. Note the following:
   - Required fields are indicated by a red asterisk (*).
   - After submitting the form, the **Agenda Item Type** field is inactive and cannot be modified. If the **Meeting Type** and **Target Meeting** fields are on a form, and have had values added to them, they are also inactive and cannot be modified.
   - If you reopen the form and change the value in the **Meeting Type** field, an error message is displayed. You will need to change the meeting type back to the value originally assigned to the meeting.

   Upon submitting the form, the agenda item is added to the **Workflow Items** pane on the Agenda dashboard.

Adding Supporting Documents to the Unity Agenda Item

Supporting documents can be added to a Unity agenda item using either a Workflow task or by using the **Attach Supporting Materials** button on the Unity form. Before you can add a document to a Unity agenda item, you must have configured the Attachments property control on the Unity form. See Setting Property Controls for Attachments on page 194 for more information.

Adding a Supporting Document Using Workflow

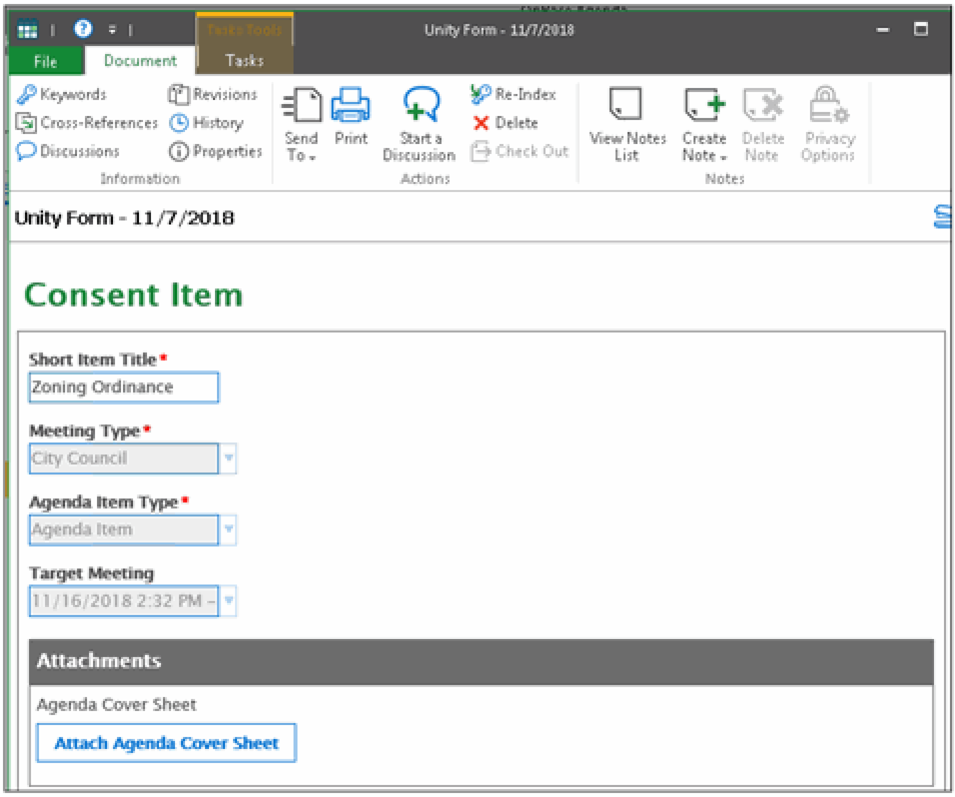
The Workflow option provides the ability to add a supporting documents created from a tag template. Typically this is used when attaching a cover sheet to the item. The Generate Supporting Document is an action that can be configured as a system task or ad hoc task:

- If your life cycle has been configured with the action as a system task, the document is typically added upon creation of the agenda item.
- If your life cycle has been configured with the action as an ad hoc task, you will need to add the document to the item manually.

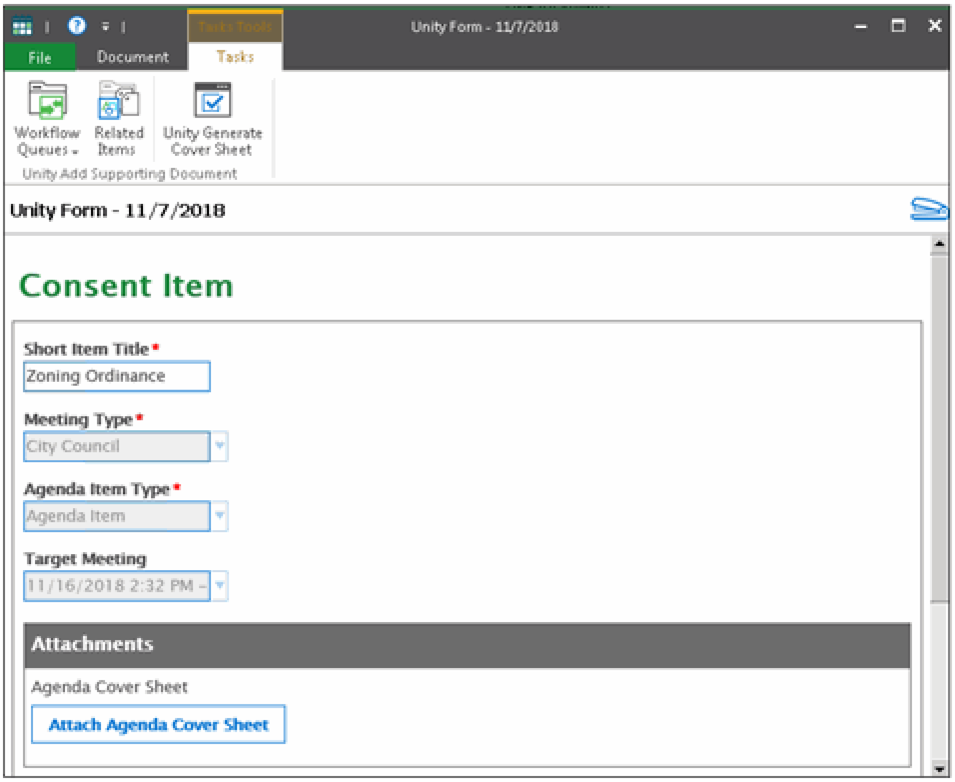
Workflow tasks and actions are created using the **Generate Supporting Document** workflow task or action (see Set Supporting Document on page 150). You may need to ask your system administrator how your Workflow has been configured.

To add a supporting document to a Unity agenda item using an ad hoc task:

1. From a meeting in Agenda, double-click the Unity agenda item to open it.

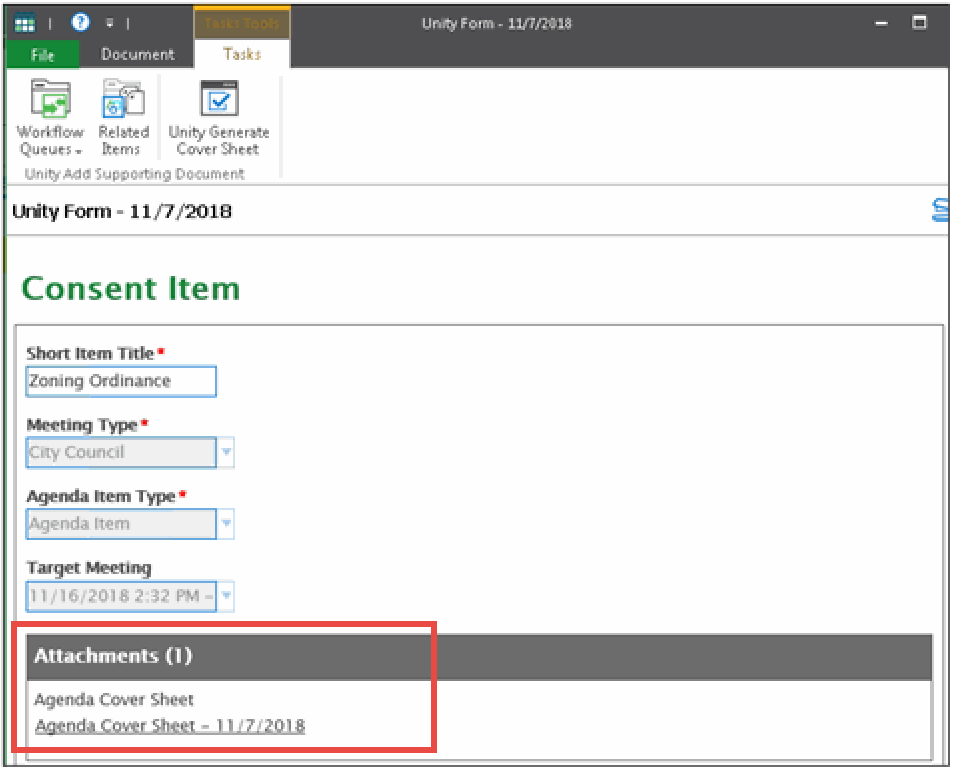


2. Click the **Tasks** tab. The Tasks options are displayed.

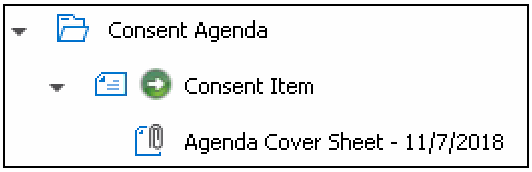


3. Click the icon that has been created to attach supporting documents. The supporting document is displayed in the **Attachments** section on the form.

Note: Depending on how your Workflow was configured, the icon may be named differently. In this instance, the icon is named **Unity Generate Cover Sheet**.



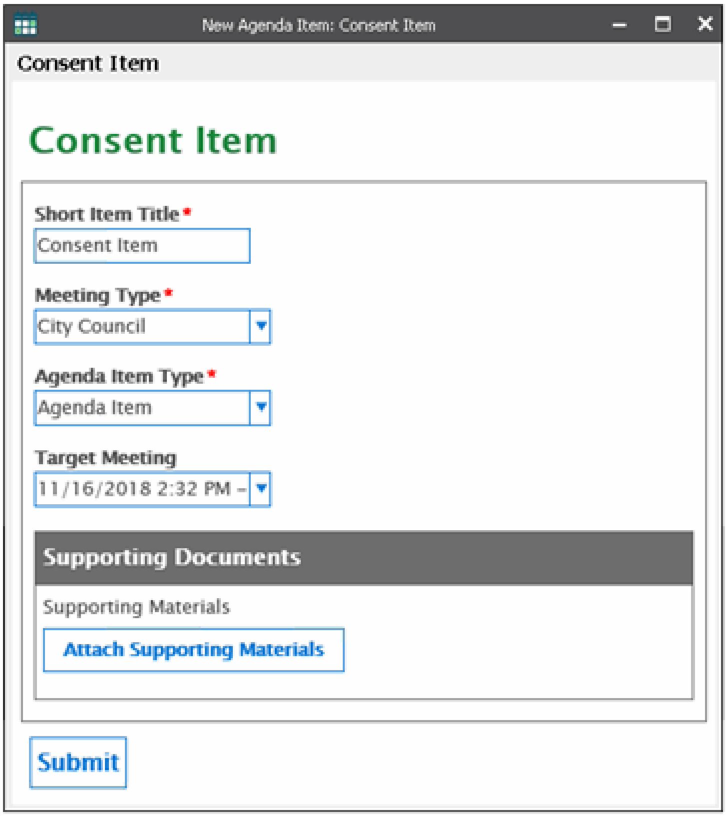
4. Click **Submit**. The supporting document is displayed in the meeting tree under the agenda item.



Adding a Supporting Document Using the Add Attachments Control

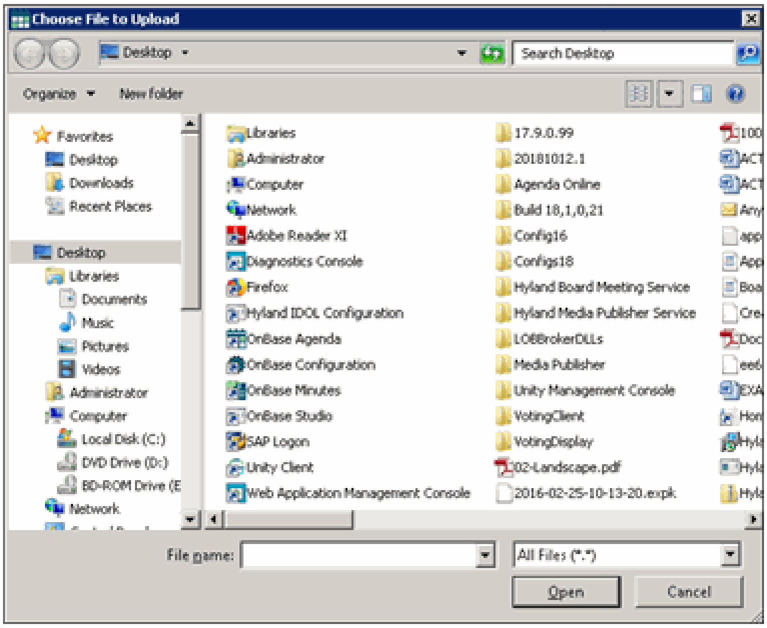
To add a document to the agenda item using the **Add Attachments** control:

1. From a meeting in Agenda, double-click the Unity agenda item to open it.

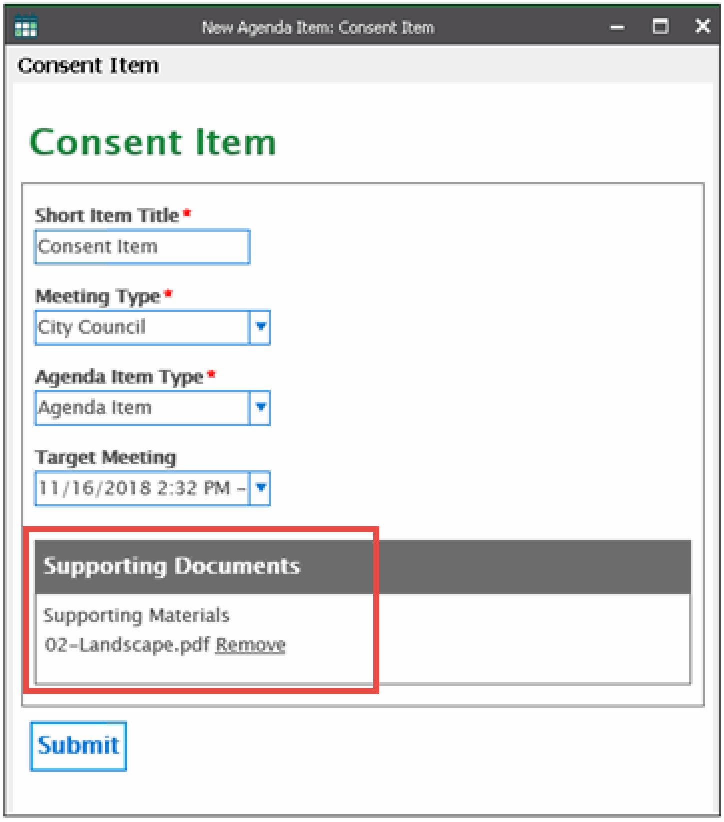


2. Click the **Attach Supporting Materials** button.

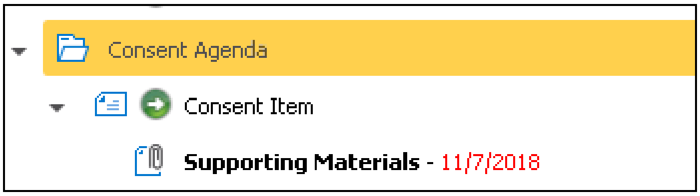
3. Select a document from the **Choose File to Upload** dialog box.



4. Click **Open**. The document is attached to the agenda item.



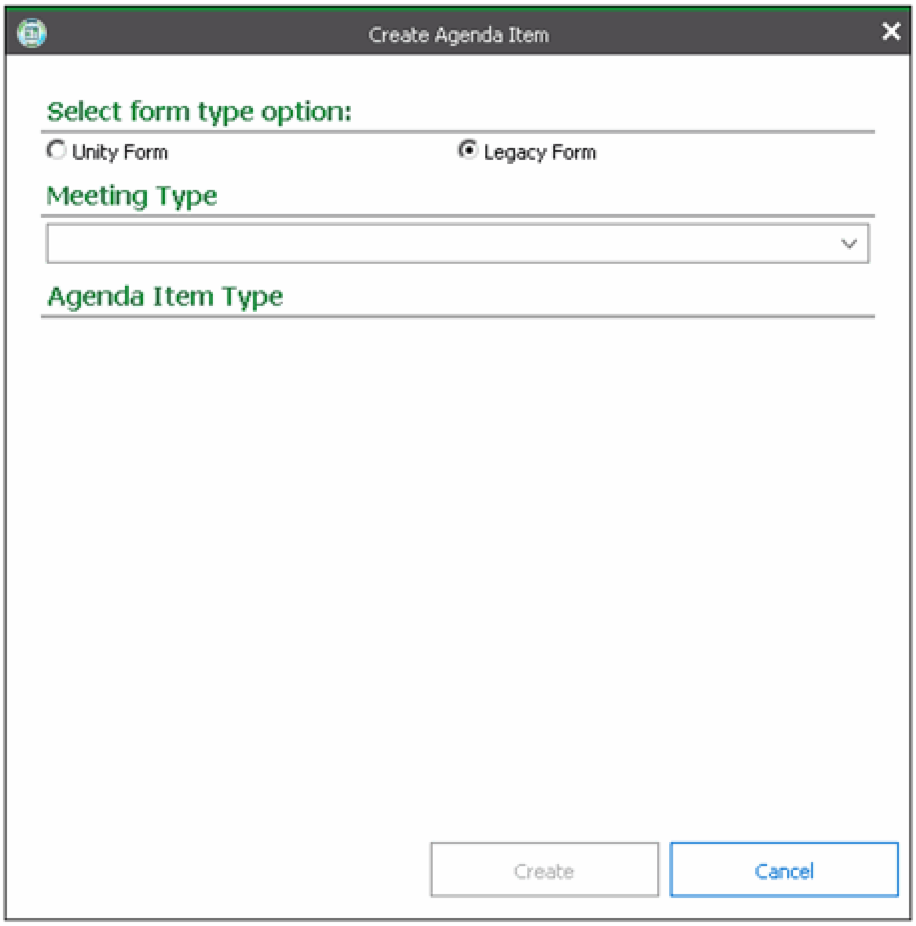
5. Click **Submit**. The supporting document is displayed in the meeting tree under the agenda item.



Creating an Agenda Item from an Entity (Legacy) Form

To create an agenda item from an Entity (Legacy) form:

1. Select the Legacy option from the **Create Agenda Item** dialog box. Any meeting types that have Legacy items assigned to them display in the **Create Agenda Item** dialog box.

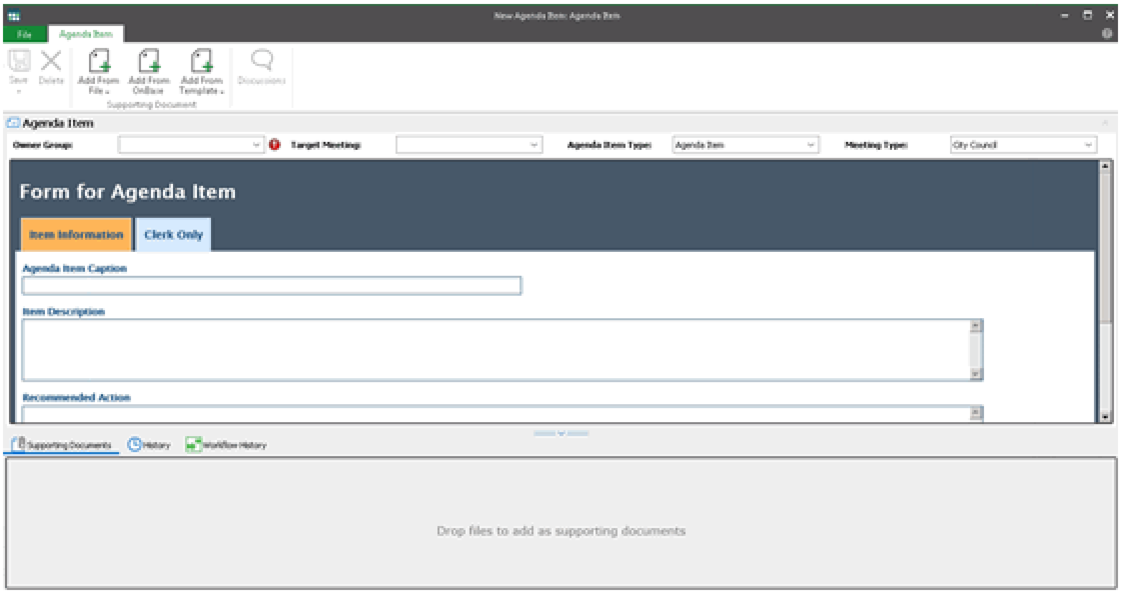


Note: The Entity (Legacy) form is being phased out and replaced with the Unity form. The Legacy Form option is displayed only if you still have agenda items created from Entity forms in your system.

2. Select a meeting type from the **Meeting Type** drop-down list. Any agenda item types available for this meeting type are displayed.
3. Select an agenda item type from the **Agenda Item Type** section.

Note: If you are creating an agenda item from within a meeting, the **Meeting Type** drop-down list defaults to the selected meeting type and is locked.

4. Click **Create**. The **New Agenda Item** window is displayed.



Note: When adding an item from within a meeting, the **Meeting Type** and **Agenda Item Type** fields are automatically populated with the agenda item type and corresponding meeting type.

5. From the **Owner Group** field, do one of the following:
   - If your user has been assigned to multiple ownership groups, select an owner group for this agenda item from the **Owner Group** drop-down list.
   - If your user is assigned to only one ownership group, the **Owner Group** field displays that group, and is read-only. It is also read-only if your user does not have edit rights for this item.
   - If the **Owner Group** field displays Everyone, the Meeting Type chosen for the agenda item does not have an ownership group configured. You can change the Meeting Type or leave the group as Everyone.
6. From the **Target Meeting** drop-down list, select the meeting instance for which you are creating this agenda item. The form for the specified agenda item is displayed in the **Agenda Item** pane.

Note: The target meeting may be required, optional, or hidden, depending on the setting in Agenda Administration. If the **Target Meeting** field is configured as required, the **Save** button is not enabled until the target meeting is selected.

7. Complete the agenda item form with all required information. Some fields may have default values assigned to them. You can either accept the default value, or modify it to suit your needs.

Note: If you are entering information into a multi-line text box, the spell check option may be available. If spell checking is available, you will see a red underline under misspelled words. Note that spell checking is available only if you are using Windows 8.1 or Windows 10 with IE 11, and the spell check option is not supported for Japanese, Arabic or Chinese languages.

8. Add all required supporting documents to your agenda item. For more detail on adding supporting documents to an agenda item, see Adding Supporting Documents to a Legacy Agenda Item on page 240.

Note: As long as you are editing the form, the **Save** button will be available in the ribbon. To save changes to the form and keep the form open, click the top portion of this button. To save changes to the form and close the form, click the bottom portion of this button and select **Save & Close**.

9. Create any required Discussion Threads on this agenda item. For more information on creating Discussion Threads, see Discussing an Agenda Item on page 250.
10. Submit the form by clicking the **Save** button on the ribbon.

    If you added a supporting document from an external source and the type selected was **Other**, you will now be prompted with the **Index New Supporting Documents** window. Index the new supporting document and click **Import**.

Note: If Keyword Types have been mapped to agenda item fields, these Keyword Types are displayed and populated in the **Index New Supporting Documents** window.

The newly created agenda item will be displayed in the **Workflow Items** pane for all users that have access to it. Depending on your system's configuration, the agenda item may need to be reviewed or approved by another user after it has been submitted.

Adding Supporting Documents to a Legacy Agenda Item

You can add supporting documents that already exist within OnBase, create supporting documents using a template within OnBase, or upload documents that have not yet been imported into OnBase.

Adding Supporting Documents From an External Source

To add supporting documents from an external source, follow these steps:

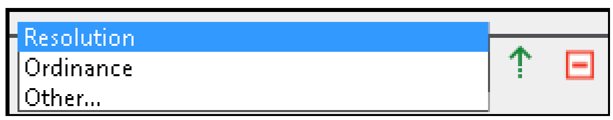
1. Click **Add From File**.
2. Select one of the supporting document types assigned to the agenda item type. If the correct supporting document type is not listed, select **Other...**

3. Select the document you want to import from the dialog box.

Tip: You can also drag and drop files from your external storage location directly into the **Supporting Documents** tab.

All supporting documents that are from an external source are displayed in the **Supporting Documents** tab with a corresponding **Import** icon:

4. If you need to modify the document types, select the drop-down arrow in the **Document Type** field, and select the correct type from the corresponding drop-down list.



5. Click **Import**. The **Import** layout is displayed, with the **Document Type** field pre-populated with the selected document type.

Note: If keywords are mapped, the upload happens silently.

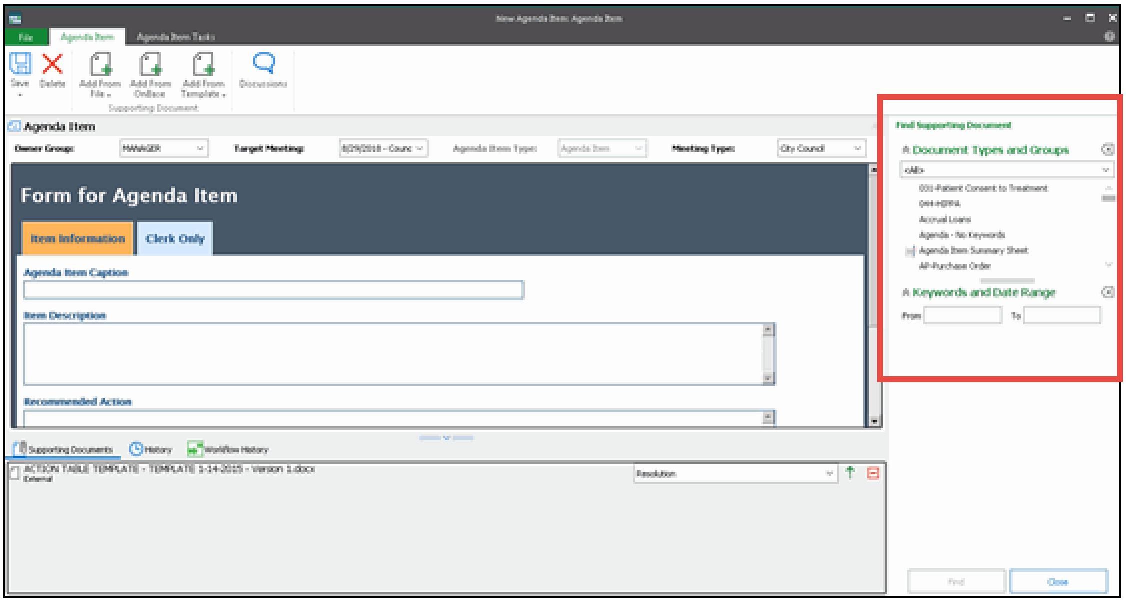
6. Index your document with all required keyword values.
7. Click **Import**. Your document is uploaded into OnBase and added to your agenda item as a supporting document.

Tip: You can **View** or **Remove** supporting documents at any time by clicking on the appropriate buttons in the **Supporting Documents** pane. You can also rearrange the order of your supporting documents by dragging and dropping your documents into the desired order from this pane.

Adding Supporting Documents From OnBase

To add supporting documents that already exist within OnBase, follow these steps:

1. Click **Add From OnBase**. The **Find Supporting Document** pane is displayed.



2. Specify all necessary search criteria to retrieve the document you need, then click **Find** or press the **Enter** key. The **Select Supporting Document** dialog box will be displayed.
3. In the **Select Supporting Document** dialog box, select the document you want, and click **OK**.

Tip: You can view the supporting document from the **Select Supporting Document** dialog box by selecting the document and pressing the **Enter** key.

Adding Supporting Documents Using a Template

Before you can use this option to add a supporting document to an agenda item, you must have done the following:

- In Agenda Administration, select a path to a Tag Template. See Creating Agenda Item Supporting Document Types on page 69 for more information.
- In Agenda Administration, ensure the document type is mapped to the agenda item type. See Creating an Agenda Item Type on page 73 for more information.

You also have the ability to configure the document type to suit your specific needs. See Agenda Tag Templates on page 159 for more information.

To create a new supporting document within OnBase using a pre-configured template:

1. Click **Add From Template** and select a template from the drop-down list. The document template is generated and displayed.
2. Fill out all required information within the **Import a Document** screen.

Note: Depending on your system's configuration, the document may be pre-populated with some or even all required information.

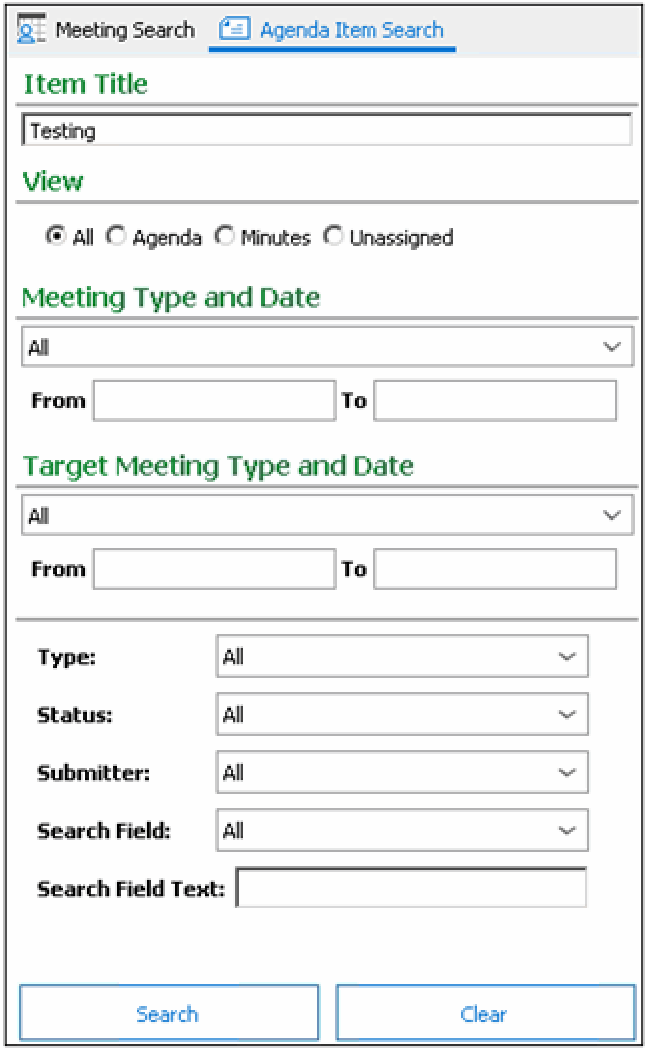
3. Click **Import** to import the document.

Reviewing Agenda Items

Depending on your system's configuration, you may be able to review agenda items that have been created by other users. Agenda provides a variety of tools for your use during the review process.

Searching for Agenda Items

The **Agenda Item Search** tab allows you to search for agenda items.



To perform a search for an agenda item, follow these steps:

1. Enter criteria to limit the results returned by your search. You can use any of the following criteria to perform your search:

Field	Description
Item Title	Type the name of the agenda item.

Field	Description
View	Select the View for which to search for agenda items. Options include: • **All**. Returns agenda, minutes and unassigned items in the results list. • **Agenda**. Returns only agenda items in the results list. • **Minutes**. Returns only minutes items in the results list. • **Unassigned**. Returns only agenda items that have not been assigned in the results list. The View column in the results list displays the name of the view used to perform the search (Agenda, Minutes or Unassigned).
Meeting Type	Select a meeting type, or **All** to search all meeting types.
Meeting Type Date	Select a From and To date range to search.
Target Meeting Type	Select a target meeting type, or **All** to search all target meeting types.
Target Meeting Type Date	Select a From and To date range to search
Type	Select an agenda item type.
Status	Select an agenda item status.
Submitter	Select an agenda item submitter.
Search Field	Select a specific agenda item field to search.
Search Field Text	Type the text in a specific agenda item field to search.

Tip: You can clear all specified criteria at any time by clicking **Clear**.

Note: The **Search Field Text** does not search the Unity form agenda items, only the Legacy items.

2. Click **Search**. Agenda items that meet the specified criteria will be displayed in the pane to the right of the **Agenda Item Search** tab.

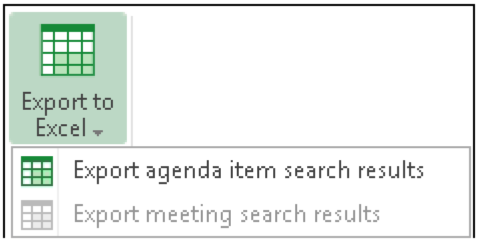
   The following information displays for each agenda item:
   - Item Title
   - Status
   - Agenda Item Type
   - User name
   - Meeting Name
   - Meeting Date
   - Target Meeting Name
   - Target Meeting Date
   - Owner Group
   - Unity Form DocId
   - View
3. Double-click an agenda item to open it.

Exporting Agenda Item Search Results to Excel

The **Export to Excel** option provides the ability to export agenda item search results to an Excel spreadsheet. This requires that Excel be installed before performing the export.

To export agenda item search results to Excel:

1. From the ribbon on the Home tab, select Export to Excel. A select list is displayed allowing you to choose the export option.



Note: You must select the Meeting Search tab to activate the export option.

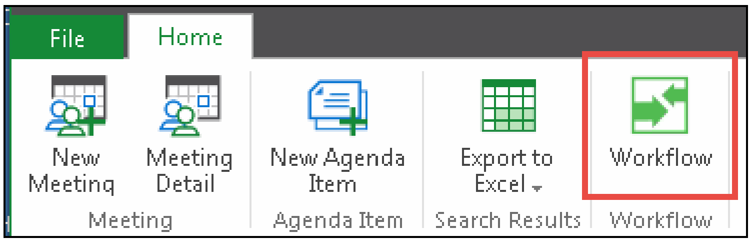
2. Select **Export agenda item search results**. The agenda item search results are displayed in an Excel spreadsheet.

Caution: The system does not differentiate closed session items, so ensure that only users who can view these items are able to view the Excel report.

Viewing Agenda Items in Workflow

You can view your agenda items in Workflow to see where they are in the life cycle. The Workflow option is provided in Agenda so you have easy access to it. However, this option is displayed only if you have Workflow or Workflow Restricted client privileges.

To access Workflow from Agenda, from the ribbon on the Home tab, click the Workflow icon.



The Workflow application is displayed in a separate window.

Viewing Agenda Items in the Workflow Items Pane

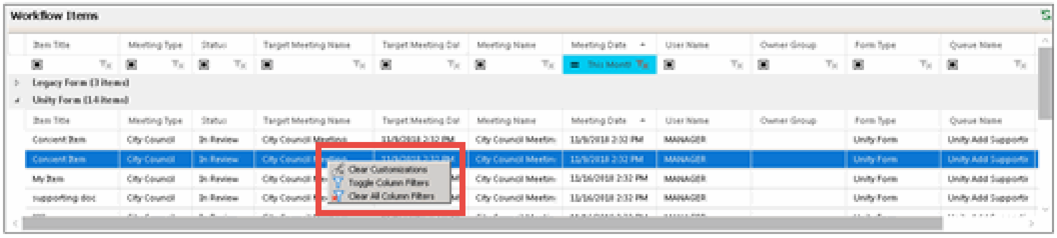
Note: Workflow licensing is required to use functionality described in this section.

The **Workflow Items** pane displays agenda items that reside in Workflow life cycles that are configured for the routing of agenda items. The **Workflow Items** pane displays the following information for agenda items that you have submitted:

Column	Description
Item Title	The name of the agenda item.
Meeting Type	The name of the meeting type.
Status	The agenda item's status.
Queue Name	The Workflow queue where the agenda item currently resides.
Life Cycle Name	The Workflow life cycle where the agenda item currently resides. **Note:** This column is not displayed if all agenda item's are from the same Workflow life cycle.

Note: There are more columns available for viewing in the **Workflow Items** pane that can be enabled using the Display Options in Agenda. See Setting Display Options on page 62 for more information.

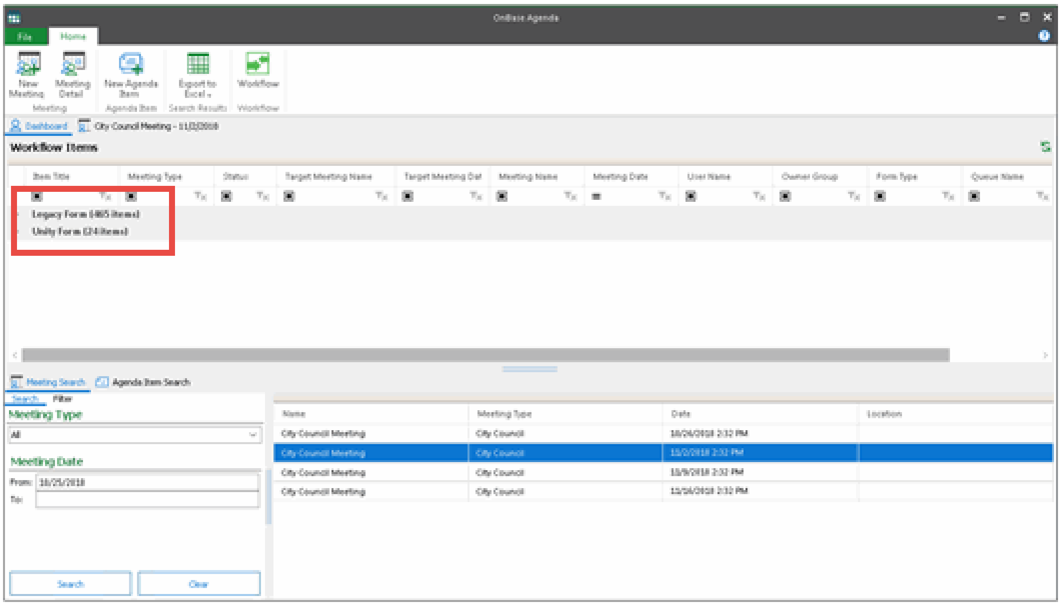
You can also right-click in the Workflow pane to choose options from a pop-up menu that is displayed.



These options allow you to:

- Clear Customizations
- Toggle Column Filters
- Clear All Column Filters

Agenda items may also be grouped according to how they were created. Currently they can be grouped into **Unity Forms** and **Legacy Forms**.



Note: When items are of both Unity form and Legacy form types, the **Form Type** column is displayed in the Workflow pane.

To view further information about an agenda item that you have submitted, double-click it to open the corresponding form. For information on the functionality that is available when viewing an agenda item, see Creating New Agenda Items on page 227.

Note: When an agenda item is being viewed, it is locked for editing by other users. Agenda items that are locked include the text **Locked by User: [User name]**. Agenda item locks that are orphaned can be removed by your system administrator, through the **Manage Locks** interface.

When you open an agenda item, a Tasks tab is available allowing you to perform more tasks on the agenda item. Depending on how the form was created (Unity or Legacy), the options are as follows:

Legacy Form

Button	Description
Tasks Queues	Click to display a list of all the queues the item is in. To open the item in a different Workflow queue, allowing you access to tasks from that queue, select the Workflow queue from this list.
Ad Hoc Tasks/ System Tasks	Click to execute an ad hoc task or system task on the item. When a task is executed, a status message displays indicating that the task was successfully executed. The name of the Workflow queue displays in the name of the ribbon group.

Unity Form

Button	Description
Workflow Queues	Click to display a list of all the queues the item is in. To open the item in a different Workflow queue, allowing you access to tasks from that queue, select the Workflow queue from this list.
Related Items	Click to display items that are related to the current work item.
Ad Hoc Tasks/ System Tasks	Click to execute an ad hoc task or system task on the item. When a task is executed, a status message displays indicating that the task was successfully executed. The name of the Workflow queue displays in the name of the ribbon group.

To refresh the **Workflow Items** pane, click **Refresh**:

Note: If you open an agenda item from the **Workflow Items** pane and save it or execute an ad hoc task, the **Workflow Items** pane is automatically refreshed.

Discussing an Agenda Item

You can record your comments on an agenda item to spark discussion with your co-workers, or to point out something that should be revised before the meeting is held.

Note: Distribution Services must be installed and licensed in order for any notifications to be sent. See the Distribution Services module reference guide for more information. Office Integration must be installed to include Outlook in order to receive notifications.

Starting a New Discussion Thread

To start a new Discussion Thread:

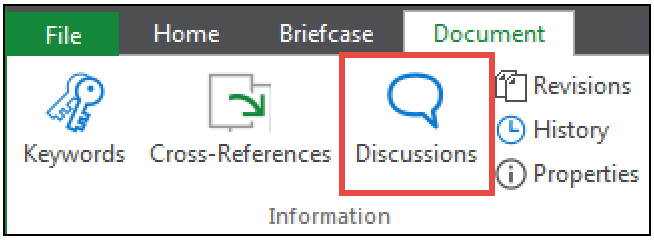
1. Double-click the Agenda Item for which you want to start a Discussion thread.
2. Click **Discussions**.
3. Click **Start a Discussion**.
4. Enter a title in the **Title** line and your main text in the text field.
5. Click **Submit**. Your Discussion Thread will be added to the list in the **Discussions** pane.

Configuring Security Options

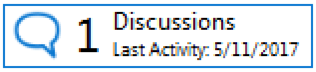
If your system is configured to allow thread level security, you can assign specific users to have access to discussion threads that you've created. This improves security when discussing sensitive information that should only be seen by certain users. Without any specific users configured with discussion thread access, all users can view a discussion thread.

To assign users to a discussion thread:

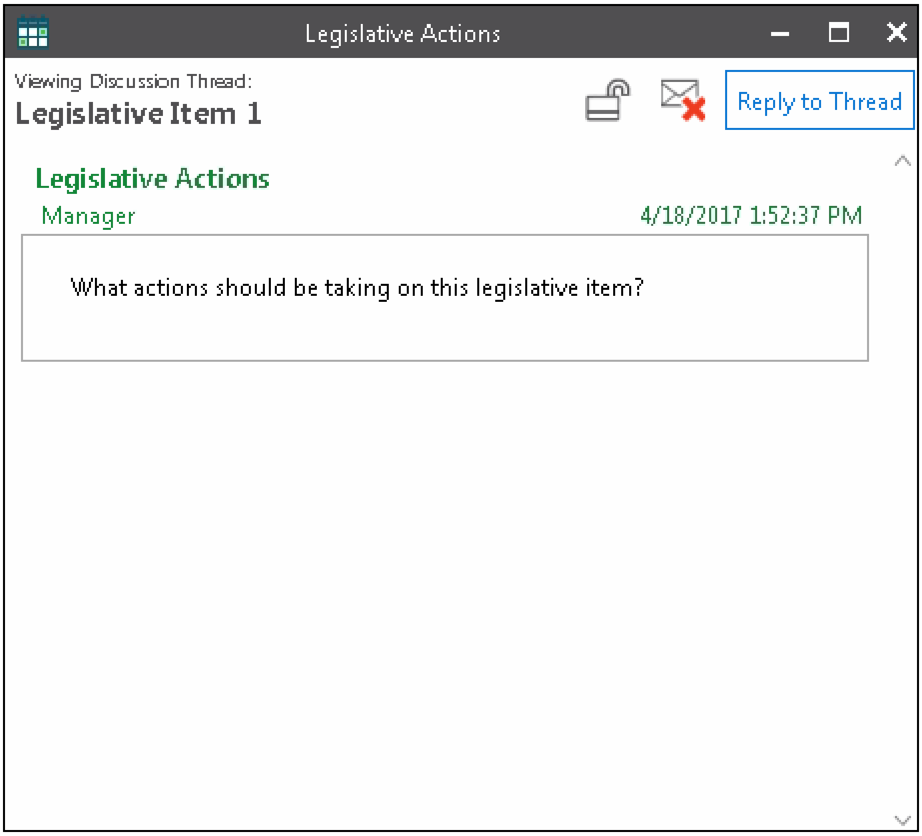
1. Open the **Discussions** pane by performing one of the following actions:
   - From a Document Search Results List or an open document, right-click on the document and select **Discussions**.
   - From the **Document** tab or the **WorkView** tab, click the **Discussions** button.



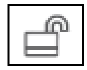
   - From an open document or WorkView object, select the **Discussions** indicator.



   All existing discussion threads are displayed in the **Discussions** pane.
2. Select the discussion thread you want to assign users to from the **Discussions** pane. The discussion thread dialog box is displayed.



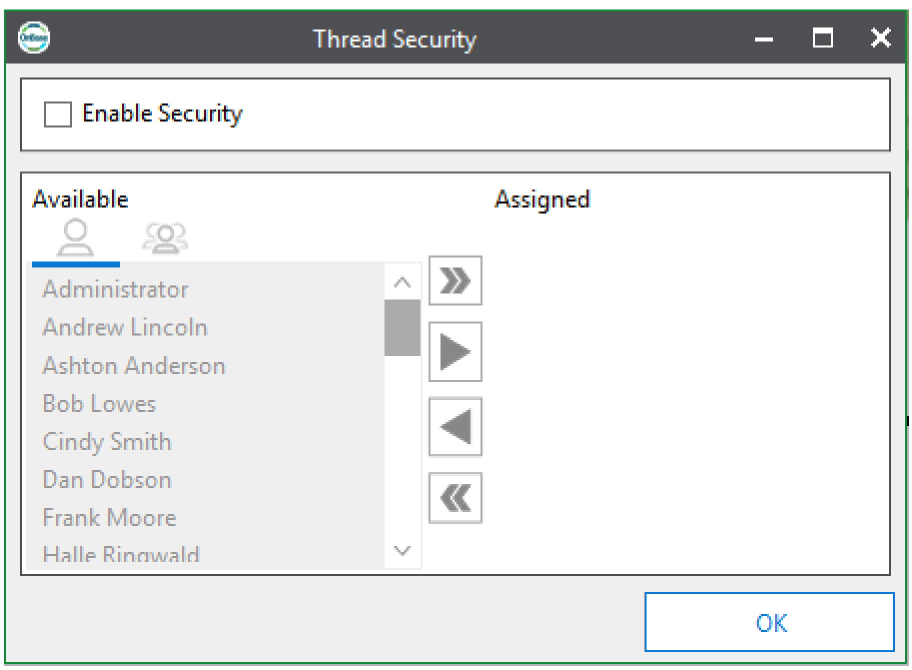
3. Click the security button at the top of the discussion thread dialog box.
   - The unlocked security button indicates that security options are not configured and all users can view and reply to the selected discussion thread.



   - The locked security button indicates that security options are configured and only selected users can view and reply to the selected discussion thread.

Note: If your system is configured to disable thread level security, the security button is not displayed in the discussion thread dialog box.

The **Thread Security** dialog box is displayed.



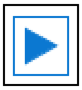
4. Select **Enable Security** to restrict access to this discussion thread. Only selected users can view and reply to the discussion thread.

5. From the **Available** column, select one of the following:

Option	Description
Users 	Assign individual users to the discussion thread.
User Groups 	Assign all users in the selected User Groups to the discussion thread.

Note: Depending on your system's configuration, the real name of the user may be displayed instead of the user name.

6. From the **Available** column, select the users or User Groups you want to be able to view and reply to the discussion thread.
7. Click the **Add Selected Items** button to add the selected users or User Groups to the **Assigned** column.

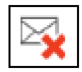


8. Click **OK**. A message is displayed that asks if you want to send a notification email to the added users.
9. Select **Yes** to send a notification email to the added users to inform them they were added to the discussion thread. Select **No** to not send a notification email to the added users.

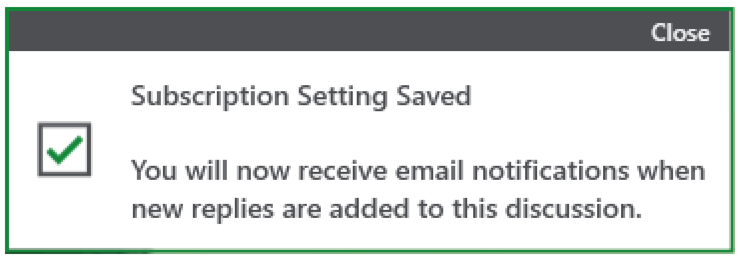
Subscribing to a Discussion Thread

The **Subscribe** button controls whether or not you receive e-mail notifications whenever a new post is added to a Discussion Thread. The appearance of the **Subscribe** button indicates whether or not you are currently receiving e-mail notifications.

The red X on the **Subscribe** button indicates that you are not receiving email notifications.



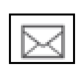
Click this button to begin receiving automatic e-mail notifications. A popup window will briefly appear to notify you of your new configuration:



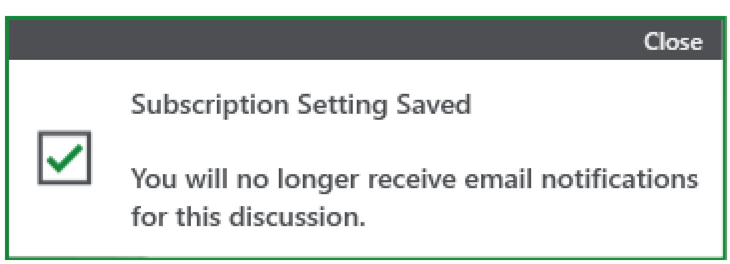
In addition, the **Subscription** icon will be displayed on the Discussion Thread.

This icon provides a quick visual indicator that you are receiving email notifications for a specific Discussion Thread.

The blank envelope on the **Subscribe** button indicates that you are receiving email notifications.



Click this button to stop receiving automatic email notifications. A popup window will briefly appear to notify you of your new configuration:



The **Subscribe** button can be found in two places:

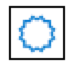
- On an existing Discussion Thread, the **Subscribe** button appears on the main post of a Discussion Thread.

- When creating a new Discussion Thread, the **Subscribe** button appears on the **New Discussion** dialog box.

Viewing a Discussion Thread

To view a Discussion Thread:

1. Click **Discussions**.
2. Click the Discussion Thread you want to view. All posts in the selected Discussion Thread display in a separate window. If a Discussion Thread has posts that you have not yet read, a icon appears next to the title.

   This icon also appears next to the title of the unread post.
3. Some posts may be hidden by default. If a post has replies that are not being displayed, the **Show Replies** button is enabled. To view these replies, select the post for which you want to open replies and click **Show Replies**. You can then click **Hide Replies** to hide these posts once again.

Tip: To view the most recent reply in full, you can hover your mouse over the Discussion Thread in the **Discussions** pane.

Replying to a Discussion Thread

To reply to a Discussion Thread:

1. Click **Discussions**.
2. Click on the Discussion Thread you want to reply to. All posts in the selected Discussion Thread are displayed in a separate window.
3. Click **Reply to Thread** to reply to the initial post. If you want to reply to one of the other posts, click that post's **Reply to Post** button.
4. Enter the body of your message into the text field. After you have finished creating your message, click **Submit**. Your reply will be added to the Discussion Thread.

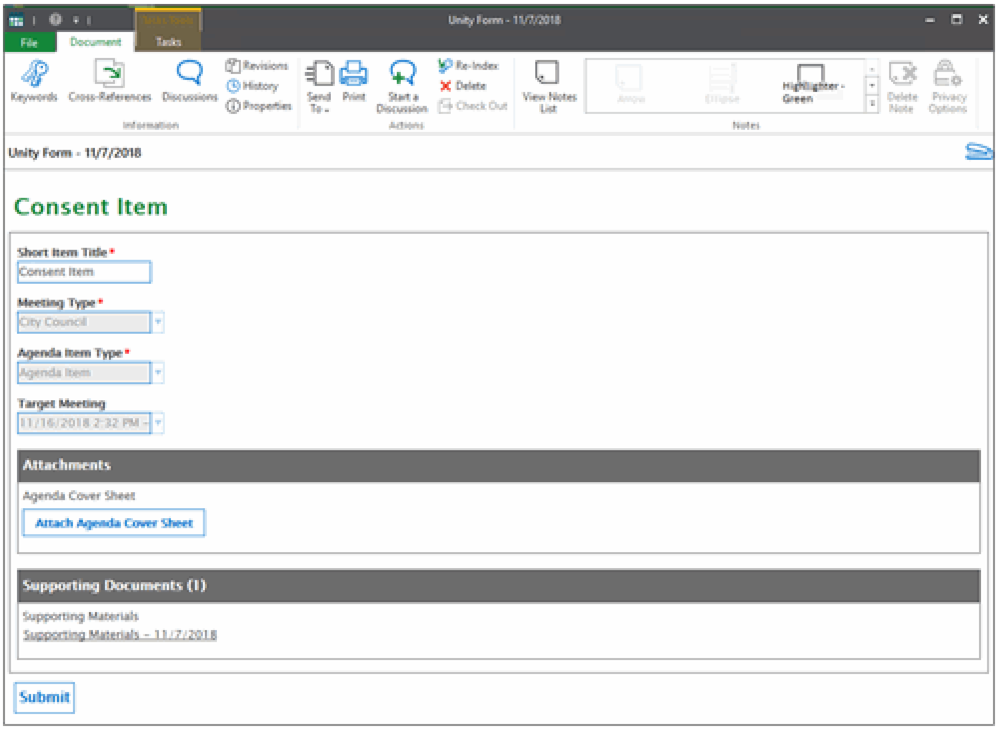
Tracking Changes Made to an Agenda Item

In order to improve security and transparency, changes to agenda items are automatically tracked within OnBase. Changes to agenda items are tracked on the agenda item's **History** tab. The History information displays in different locations depending on if the agenda item is a Legacy item or a Unity item.

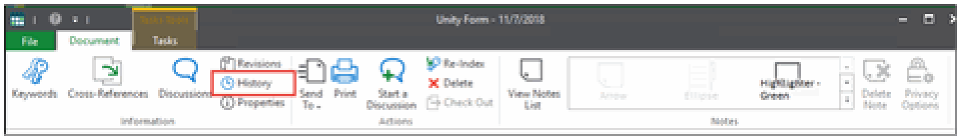
Tracking Changes on a Unity Agenda Item

To track changes on a Unity agenda item:

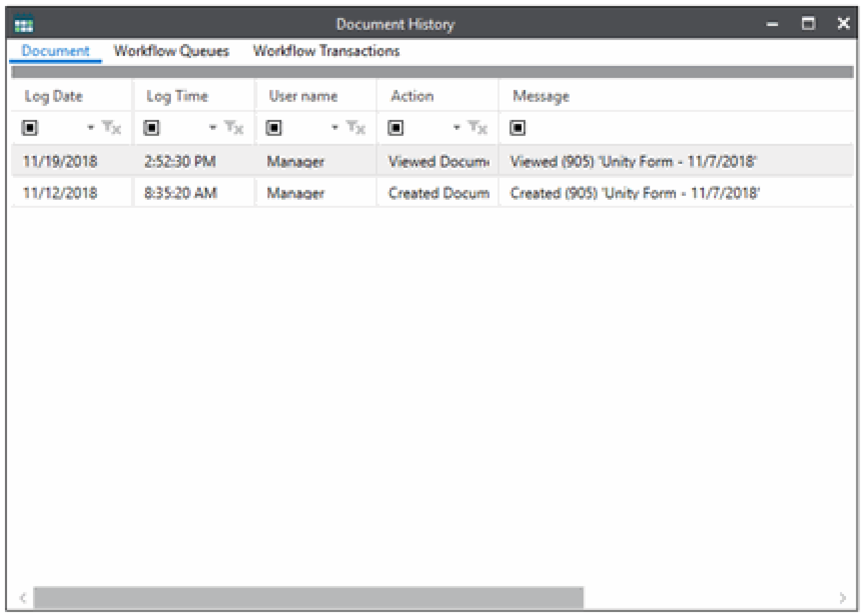
1. From the agenda item search results, double-click a Unity agenda item. The Unity form is displayed.



2. Select the **History** option from the ribbon.



The Document History screen is displayed.

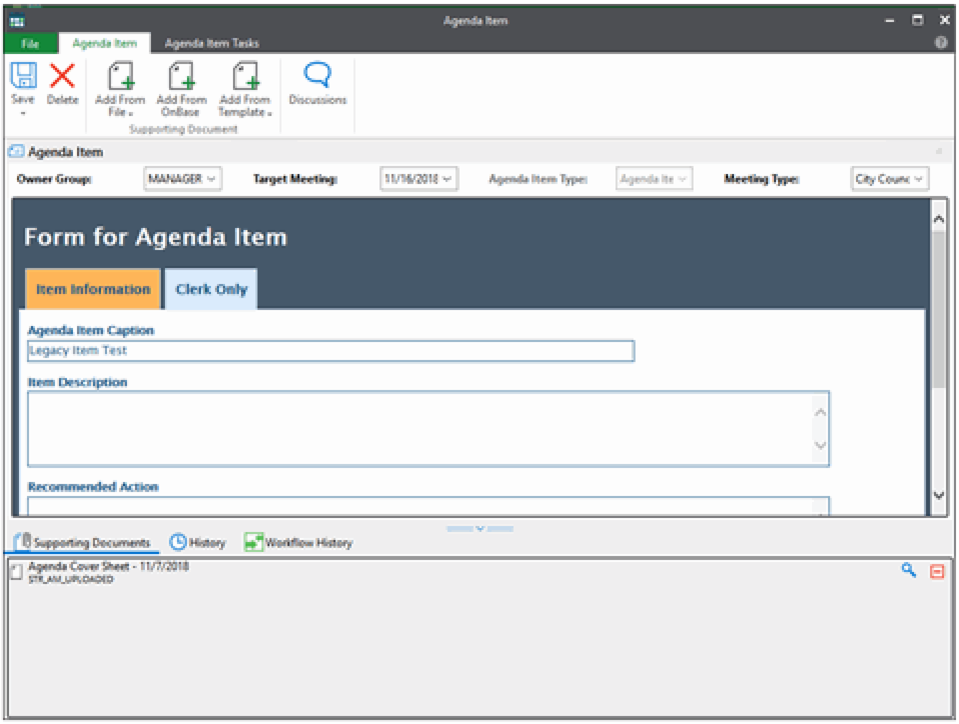


3. Click any of the following tabs to view the history for this item:
   - **Document**. This tab displays the status of the agenda item.
   - **Workflow Queues**. This tab displays the status of any documents attached to the agenda item.
   - **Workflow Transactions**. This tab displays the status of any workflow transactions taken on the agenda item.

Tracking Changes on a Legacy Agenda Item

To track changes on a Legacy agenda item:

1. From the agenda item search results, double-click a Legacy agenda item. The Legacy form is displayed.



2. Click the **History** tab.

Information is displayed in the History tab, which contains the following columns:

- Transaction ID
- User Name
- Event Date
- Description
- Modified Field
- Start Value
- End Value

Note: Field names displayed in the **History** tab will be truncated to the first 23 characters.

You can also track an agenda item as it moves through Workflow on the agenda item's **Workflow History** tab. This tab contains the following columns:

- User
- Date and Time
- Event

Deleting an Agenda Item

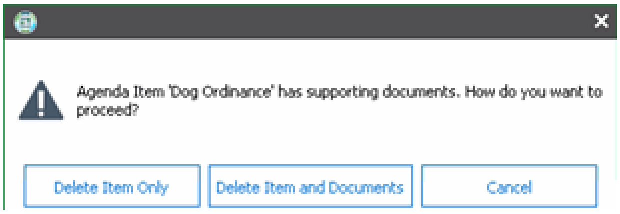
Agenda items can be deleted from the Agenda dashboard, and from the main Meeting pane. For information on deleting agenda items from the Meeting pane, see Working with Agenda Items on page 294.

Note: When an agenda item is pending, it can only be deleted by the submitter. Once an agenda item has been added to a meeting, it can be deleted by any users with the **Write/Edit** security setting for the meeting type as long as a motion has not been recorded on the item.

To delete an agenda item from the Dashboard, perform an agenda item search (see Searching for Agenda Items on page 244). From the results pane, right-click on the item you want to delete, and select **Delete**.

Note the following:

- If the agenda item does not contain supporting documents or motions, you are prompted to confirm that you want to delete the agenda item. Click **OK** to delete the agenda item.
- If the agenda item contains supporting documents, the following message box is displayed:



  - Click **Delete Item Only** to delete the agenda item and retain the supporting documents.
  - Click **Delete Item and Documents** to delete the agenda item and any supporting documents.

Working With Meetings

Once an agenda item has been reviewed and approved, it can be added to the meeting for which it will be used. Users can then perform a variety of meeting-specific actions, such as modifying meeting information, generating meeting packets, or tracking meeting attendance.

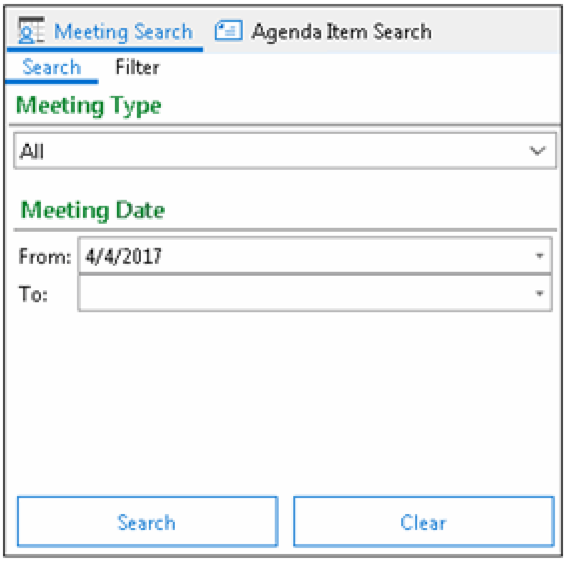
Caution: It is recommended that you **not** have the same meeting open in both Agenda and Minutes. It is also recommended that you not have the same meeting open in two separate instances of Agenda.

Retrieving Meetings

The **Meeting Search** tab allows you to search for past meetings, or filter the list of upcoming meetings that displays in the **Meeting List** pane.

Searching for Meetings

The **Search** tab allows you to search for past or upcoming meetings:



1. From the **Meeting Type** drop-down list, select a meeting type. Select **All** to display all meetings.
2. In **Meeting Date**, select **From** and **To** dates from the corresponding drop-down calendars.

Note: The default **From** date is the date that is two weeks prior to the current date.

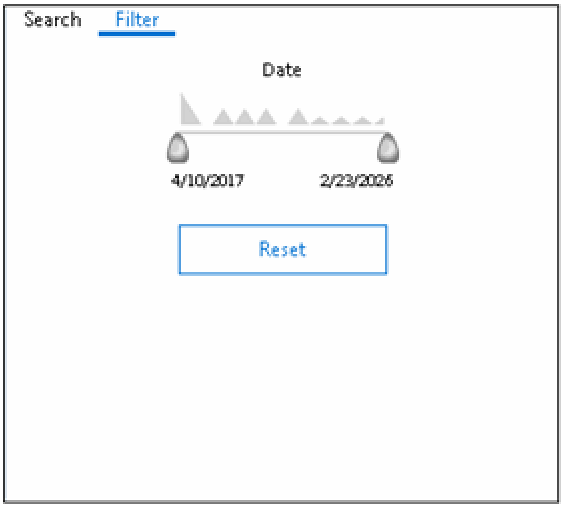
3. Click **Search**.
4. Meetings that meet the specified criteria are displayed in the **Meeting List** pane.
5. Double-click a meeting to open it.

Tip: You can clear all specified criteria at any time by clicking **Clear**.

The **Filter** tab is automatically selected so that you can further refine your search results list. For more information on this tab, see Filtering the Meeting List on page 262.

Filtering the Meeting List

The **Filter** tab allows you to filter the list of meetings that displays in the **Meeting List** pane:



Note: The **Filter** tab is not populated unless there are two or more meetings listed.

The Date filter is available on this tab. This filter displays as a slider, with two thumbs beneath a sparkline. The sparkline indicates the density of data over the range of values. If a meeting has not taken place in the last two weeks, the lower date range on this tab is the date that is two weeks prior to the current date.

“Pinch” the thumbs in this filter towards each other to narrow down the list of meetings in the **Meeting List** pane.

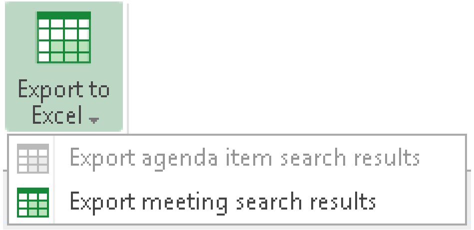
Click **Reset** to clear an applied filter.

Exporting Meeting Search Results to Excel

The **Export to Excel** option provides the ability to export meeting search results to an Excel spreadsheet. This requires that Excel be installed before performing the export.

To export meeting search results to Excel:

1. From the ribbon on the Home tab, select Export to Excel. A select list is displayed allowing you to choose the export option.



Note: You must select the Meeting Search tab to activate the export option.

2. Select **Export meeting search results**. The meeting search results are displayed in an Excel spreadsheet.

Viewing Meetings from the Meeting List

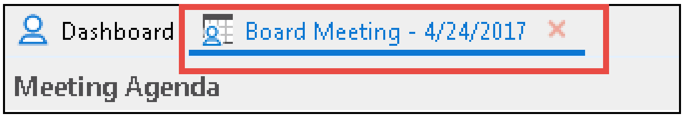
The **Meeting** layout displays after double-clicking a meeting instance, unless vote types and motion result types have not been configured. If vote types and motion result types have not been configured in Agenda Administration, messages boxes display, indicating that before you can continue, you must configure Vote and Motion result types.

Click **OK**, and then see Configuring Attendance, Motion and Vote Types on page 134 to configure the vote and motion result types.

The **Meeting List** pane displays the following information for all future meetings and any meetings two weeks prior to the current date:

- Name
- Meeting Type
- Date
- Location

Each meeting layout that you open is represented by a tab:



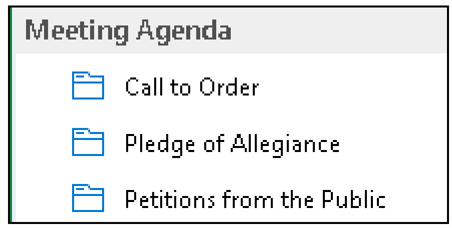
This tab includes the name of the meeting and the meeting date.

If you make a change to the meeting, an asterisk is added to this tab:

This asterisk indicates that your changes have yet to be saved. After saving your changes, the asterisk is removed from this tab.

To close a meeting layout, click the corresponding **X**.

The **Meeting** layout contains the following panes:

Pane	Description
Meeting Agenda	Contains the meeting agenda, displayed in a tree structure:  If agenda items are configured with a status, an icon representing this status displays between the agenda item icon and agenda item name:  Place your mouse over this icon to display a tooltip of the item's status.
[Name of Meeting] - Meeting Information	Depending on the view you have selected (Agenda or Minutes View), this section contains information about the meeting on the following tabs: • **Meeting Documents** - See Viewing and Deleting Meeting Documents on page 279 for more information (Agenda and Minutes Views) • **Meeting Detail** - See Viewing Meetings in Agenda or Minutes View on page 277 for more information (Agenda and Minutes Views) • **Attendance** - See Meeting Attendance on page 280 for more information (Agenda View Only) • **Roll Call** - See Viewing the Roll Call on page 283 for more information (Minutes View Only).

Pane	Description
Item Information	Depending on the view you have selected (Agenda or Minutes View), this section contains information about the item selected in the **Meeting Agenda** pane on the following tabs: • **Pending Agenda Items** - See Modifying a Meeting's Agenda Items on page 285 for more information (Agenda View Only). • **Details** - See Viewing Agenda Items and Supporting Documents on page 286 for more information (Agenda and Minutes Views). • **Motion** - See Modifying Motions on page 287 for more information (Minutes View Only). • **Minutes** - See Modifying Minutes on page 291 for more information (Minutes View Only).

The **Meeting** tab is available when working with a meeting. For more information, see Modifying Meetings on page 265.

When a meeting is configured for use with Workflow, the **Meeting Tasks** tab is available. This tab includes the following:

Button	Description
Tasks Queues	Click to display a list of all the queues the meeting instance is in. To open the meeting instance in a different Workflow queue, allowing you access to tasks from that queue, select the Workflow queue from this list.
Ad Hoc Tasks/ System Tasks	Click to execute an ad hoc task or system task on the meeting instance. When a task is executed, a status message displays indicating that the task was successfully executed. The name of the Workflow queue displays in the name of the ribbon group.

Note: Workflow licensing is required to use this functionality.

Modifying Meetings

The **Meeting** tab is available when working with a meeting. There are three main sections you can use to modify your meeting:

- Actions
- Agenda Item
- View

Modifying Meeting Actions

Meeting actions include the following:

- Save Meeting on page 266
- Delete Meeting on page 267

Save Meeting

Click **Save Meeting** to save edits to the meeting. This button is disabled unless changes have been made to the meeting.

Refresh Meeting

Click **Refresh Meeting** to refresh item details and item attachments. This button is disabled when the **Save Meeting** button is enabled.

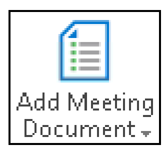
Generate Document

Click **Generate Document** to generate a document. After clicking, a list displays that contains all configured agenda document templates, Minutes document templates and packet templates. Select an agenda document template, minutes document template or packet template to generate the document or packet.

You can also select one of the following:

- **Agenda...** - Select to generate an agenda document. After selecting, the **Agenda Document Options** dialog box displays. See Generating an Agenda Document on page 299 for more information.
- **Minutes...** - Select to generate a minutes document. After selecting, the **Minutes Document Options** dialog box displays. See Generating a Minutes Document on page 303 for more information.
- **Summary**... - Select to generate a summary document. After selecting, the **Summary Options** dialog box displays. See Generating a Summary Document on page 301 for more information.
- **Packet...** - Select to generate a meeting packet. After selecting, the **Packet Generation Options** dialog box displays. See Generating a Meeting Packet on page 305 for more information.

Add Meeting Document



Click **Add Meeting Document** to upload one of the following types of documents to the **Meeting Documents** tab:

- **Meeting Document** - Select to add a meeting document.
- **Summary Document** - Select to add a meeting summary document.
- **Minutes Document** - Select to add a minutes document.
- **Packet** - Select to add a meeting packet.

The following selections are available for each of the above types of documents:

- **Add From OnBase** - Select to add a document stored in OnBase using the **Find Supporting Document** pane. For more information on this pane, see Creating New Agenda Items on page 227.
- **Add From File** - Select to add a document stored outside of OnBase using the **Import** window. For more information on this window, see the Unity Client help file.

Note: Meeting documents in non-Word formats are not fully supported during publishing.

Delete Meeting

Click **Delete Meeting** to delete the open meeting instance.

One of the following occurs:

- You are prompted to confirm that you want to delete the meeting instance. Click **Yes** to delete the meeting instance. Click **No** to retain the meeting instance.
- If the meeting has Agenda Items or documents assigned to it, a message box is displayed, stating that the meeting cannot be deleted. Click **OK** to close the message box.

  If you must delete this meeting, you need to remove the items from the meeting. You can delete the items, place the items in the pending items list, or assign the items to a new meeting.

Meeting Agenda Numbering

Click **Meeting Agenda Numbering** to implement a numbering scheme on the meeting agenda.

Note: In the Minutes view, only an administrator has the ability to add Meeting Agenda Numbering.

The **Agenda Item Numbering** window displays.

1. From the **Apply changes to** drop-down list, select one of the following:
   - **Entire tree** - Select to number the meeting agenda across the entire tree.
   - **Selected section only** - Select to number the meeting agenda in the selected section only. All children of the selected section will be numbered.
2. In the **Click level to modify** pane, select a level of the meeting agenda.
3. From the **Number Format** drop-down list, select to use numbers, letters, or Roman numerals.
4. In **Number Restart Options**, select one of the following:
   - **Continuous Numbering** - Select to use continuous numbering across sections.
   - **Restart numbering at each section** - Select to restart numbering at each section.
5. Select the **Skip Numbered Items** check box to keep the system from placing an agenda number next to an item that already contains a number.
6. Repeat the above steps to configure the numbering format for each level of the agenda.
7. Click **Save** to close the **Agenda Item Numbering** window.

Note: If a meeting has not yet been run in Minutes, the numbering scheme is automatically applied to the meeting tree in the Minutes View. You can view the numbering scheme in the Minutes View either after the meeting has been run, or upon clicking the **Create Minutes View** icon.

Agenda Item Numbering

Click **Agenda Item Numbering** to implement a numbering scheme on the agenda item.

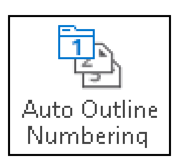
Note: In the Minutes view, only an administrator has the ability to add Agenda Item Numbering.

The **Agenda Item Numbering** window displays.

1. In **Agenda Section Options**, select one of the following:
   - **Number agenda items in all sections** - Select to number agenda items in all sections.
   - **Number agenda items in selected section only** - Select to number agenda items in the selected section only.
2. From the **Number Format** drop-down list, select to use numbers, letters, or Roman numerals.
3. In **Number Restart Options**, select one of the following:
   - **Continuous Numbering** - Select to use continuous numbering across sections.
   - **Restart numbering at each section** - Select to restart numbering at each section.
4. Click **Save** to close the **Agenda Item Numbering** window.

Note: If a meeting has not yet been run in Minutes, the numbering scheme is automatically applied to the meeting tree in the Minutes View. You can view the numbering scheme in the Minutes View either after the meeting has been run, or upon clicking the **Create Minutes View** icon.

Auto Outline Numbering



The **Auto Outline Numbering** button automatically numbers your outline per a set of options set up during meeting outline configuration. See the following configuration sections for more information:

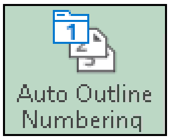
- See Creating an Agenda Outline Template on page 92 to learn how to set up the auto outline template.
- See Creating a Meeting Type on page 100 to learn how to activate the Auto Outline Numbering feature for your meeting type.

The **Auto Outline Numbering** icon is always available on the toolbar, but it must be toggled to On in order to automatically number agenda sections and items.

Note: This option works only in Agenda mode, and only if the meeting has not yet been run in OnBase Minutes.

To use the Auto Outline Numbering option:

1. Open a meeting that has been configured to use auto numbering. Existing sections and items should be numbered per the configuration options.
2. Click the **Auto Outline Numbering** icon to toggle it on.



3. Either add new agenda items, or copy agenda items from other meetings. Note that items are not numbered immediately. Numbering does not take affect until the meeting is saved.
4. Click **Save Meeting** when finished. The items you added are automatically numbered.

Note: If the Auto Outline Numbering icon is toggled to off, the **Save Meeting** icon is not activated when new or copied items are added to the meeting tree, and new or copied items are not auto numbered.

When you either rearrange or delete agenda items, the item numbering automatically changes once the meeting is saved.

Generate Agenda Item Packets

Click **Generate Agenda Item Packets** to generate agenda item packets for the meeting.

Note: The Generate Agenda Item Packets icon is inactive when in the Minute view. See Viewing Meetings in Agenda or Minutes View on page 277 for more information.

The **Generate Agenda Item Packets** window displays.

1. In **Agenda Item Packet Options**, select one of the following:
   - **Include existing\generate missing Agenda Item Packets** - Select to generate agenda item packets for any agenda items that do not already have agenda item packets.
   - **Regenerate all Agenda Item Packets** - Select to regenerate all agenda item packets.
2. From the **Agenda Item Packet Template** drop-down list, select the template that will be used to generate the agenda item packet.

3. In **Output File**, from the **OnBase Document Type** drop-down list, select the OnBase Document Type where the generated document should be stored. Specify any of the following:
    - **Closed-session Document Type** - Select the OnBase Document Type where the generated closed-session document should be stored.
    - **File Type** - Select a file type.
4. In **Text Overlays**, specify any text overlays that should be used in the generated document.
5. Click **Save** to close the **Generate Agenda Item Packets** window and generate the packet.

Note: You can remove generated item packets from an Agenda Item by right-clicking on the Agenda Item Packet and selecting **Remove Packet from Agenda Item**.

Packet Export

Click **Packet Export** to generate an agenda document and export it and all the agenda item packet files to a location outside of OnBase.

The **Packet Export Options** window displays.

1. In **Agenda Document Options**, select one of the following:
    - **None** - No agenda document will be generated.
    - **Template** - Select to use a pre-existing template to generate a document.
    - **Existing Document** - An existing document that is associated with a meeting will be used.
    - Select the **Convert Agenda Document To PDF file format** check box to convert the agenda document to a PDF.
2. In **Export to Folder**, specify the location where the packet will be saved.
3. Click **Save** to close the **Packet Export Options** window and generate the packet.

Agenda To Go & Voting Client

Click **Agenda To Go & Voting Client** to enable or disable the meeting in the Agenda To Go and Voting apps.

When you select this icon, the following options are available:

- **Enable for Agenda To Go & Voting Client**. Select this option to make the meeting and attachments available to be downloaded in Agenda To Go. Selecting this option also provides the ability for this meeting to be viewed in the Voting Client. This option is disabled if the meeting is already enabled in Agenda To Go & Voting.
- **Refresh Attachments**. Select this option to refresh any attachments that have been added after the meeting has been enabled in Agenda To Go.

Note: The **Refresh Attachments** option should be selected just before running the meeting to ensure that the documents with renditions are available to view in the Voting Client.

- **Disable from Agenda To Go & Voting Client**. Select this option to make the meeting unavailable to be downloaded in Agenda To Go, and unavailable to be viewed in the Voting Client.

Publish

Click **Publish** to create a PDF version of the agenda document that displays in Agenda Online. In order to activate the Publish icon, you must do the following for each meeting type:

- **Enable publishing**. In the Agenda Administration tool, you must enable publishing before you can publish any documents (agenda, minute or summary). See Creating a Meeting Type on page 111 for more information.
- **Set up publish mappings**. In the Agenda Administration tool, you must map source OnBase document types to publish OnBase document types. See Creating a Meeting Type on page 111 for more information.
- **Generate a meeting document**. After the document is generated, select it from the **Meeting Documents** tab to activate the Publish icon. You can publish Agenda, Minutes, Summary, and Agenda Packet documents from both the Agenda view and the Minutes view.

Note: Meeting documents that cannot be converted to a PDF file are not supported.

When you select the Publish icon, you can choose to publish **with attachments** or **without attachments** for an Agenda or Minutes document. Summary documents may only be published without attachments.

Note: If a document publish fails, you can republish or unpublish the document to resolve the issue.

Once a document is published, it is added to the Agenda Online application, and it is stored in Unity Client (under the publish document type) so it can be fully text cataloged. Documents that have multiple versions available in Unity Client may also be viewed in HTML. The document type must have renditions enabled when it is stored in order to be made viewable in HTML (rendition permissions are set in the OnBase Configuration application), and it must be created from a tag template only (see Agenda Tag Templates on page 159 for more information).

When the document displays in the Unity Client, you can click the **Revisions** option to view the document in either PDF form or HTML.

Note: The HTML option is available only for tag templates. Doc Comp templates are not supported at this time.

If you republish an existing document to Agenda Online, it will overwrite the document currently listed.

Note: Any supporting material document that cannot be converted into PDF (i.e., Audio files and other non-Office or non-simple text formats) receive a placeholder PDF file during publishing.

Unpublish

Click **Unpublish** to remove documents from Agenda Online. The link to the document is removed from Agenda Online. When you select the **Unpublish** icon, you can choose which documents to unpublish. Options include Agenda, Summary, Minutes, Agenda Packet, and Minutes Packet.

If you change the votes in the Minutes application and then upload the meeting to Agenda, it is recommended that you unpublish the meeting minutes and/or summary until all editing is complete. Once you have completed your edits, republish the minutes or summary document to the Agenda Online application.

Note: This icon is not activated unless there are published documents.

Create Minutes View

Click **Create Minutes View** to create a Minutes view for meetings that either haven't been run yet or that were run in the past. This allows you to add minutes, motions and votes to a meeting without having to open the meeting in the Minutes application.

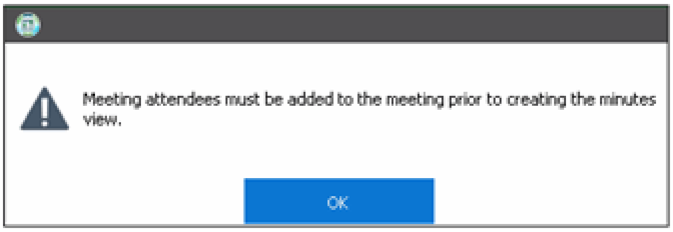
This icon is disabled if:

- The meeting has already been run in the Minutes application
- The meeting is set for a future date
- Changes have not yet been saved to a new meeting
- You have Read/View meeting details access
- No members have been associated with the meeting

If you have a meeting scheduled prior to the current date, and you have not run it through the Minutes application, when you select **Create Minutes View**, a roll call is automatically created in the Minutes view and is placed under the first section in the agenda. See Viewing Meetings in Agenda or Minutes View on page 277 for more information.

Note: If you have existing meetings where minutes, motions and votes have been recorded, you must use this function in order to generate the Minutes outline in Agenda.

If members have not been assigned to the meeting body, the following message is displayed:



Click OK. See Configuring Meeting Bodies on page 87 for instructions on assigning members to meetings.

Modifying Agenda Items

The following agenda item options can be modified:

- New Agenda Item on page 274
- Copy Agenda Item From on page 274
- Copy Agenda Item To on page 275
- Copy Multiple Items To on page 275
- Supporting Document on page 276
- Generate Agenda Item Packet on page 276

New Agenda Item

Click **New Agenda Item** to add a new agenda item to the selected agenda section.

See Creating New Agenda Items on page 227 for more information.

Copy Agenda Item From

Click **Copy Agenda Item From** to copy an agenda item from a meeting to the selected agenda section.

Note: This option is not enabled if you do not have Write access to meetings.

The **Copy Agenda Item From** window displays.

1. From the **From Meeting** drop-down list, select the meeting from which to copy the agenda item. Meetings in this list display in chronological order.
2. From the **View** drop-down list, select the view to copy the item from. Choices are Agenda and Minutes.
3. From the **Agenda Item** drop-down list, select the agenda item. The agenda items available correspond to the view selected in step 2.
4. If the agenda item contains supporting documents, these documents are displayed in the **Supporting Documents** list.
5. Documents with the corresponding **Include** check box selected are included with the copied agenda item.

6. Click **Save** to close the **Copy Agenda Item From** window.
7. The agenda item displays in the **Agenda Tree**.

Copy Agenda Item To

Click **Copy Agenda Item To** to copy the selected agenda item to a different meeting.

Note: This option is enabled only if you have either Administrator or Write\Edit Meeting Details access to the meetings.

The **Copy Agenda Item To** window displays.

1. From the **To Meeting** drop-down list, select the meeting to copy the agenda item to. Meetings in this list display in chronological order.
2. From the **To Agenda Section** drop-down list, select the agenda section to copy the agenda item to.
3. If the agenda item contains supporting documents, these documents are displayed in the **Supporting Documents** list.

   Documents with the corresponding **Include** check box selected are included with the copied agenda item.
4. Click **Save** to close the **Copy Agenda Item To** window.

Note: You cannot copy an agenda item to a meeting that has been run in Minutes.

Copy Multiple Items To

Click **Copy Multiple Items To** to copy several agenda items from one meeting to another.

Note: This option is enabled only if you have either Administrator or Write\Edit Meeting Details access to the meetings.

Upon clicking Copy Multiple Items To, the **Copy Multiple Items To** window displays.

1. Select the check box next to the items you want to copy.
2. From the **To Meeting** drop-down list, select the meeting to copy the agenda items to. Meetings in this list display in chronological order.
3. From the **To Agenda Section** drop-down list, select the agenda section to copy the agenda items to.
4. If the agenda items contain supporting documents that you want to copy to the meeting, select the **Include Supporting Documents** check box. This option is selected by default.

   Supporting documents that contain Item Packets may also be copied. Select the **Include Item Packets** check box to copy item packets to the meeting.

Note: If the **Include Supporting Documents** option is not selected, the **Include Item Packets** option is disabled.

5. Click **Save** to close the **Copy Multiple Items To** window.

Supporting Document

Click **Supporting Document** to add a supporting document to the selected agenda item.

Note: Supporting documents cannot be added to Unity form templates using this option. This functionality is disabled unless you are modifying a Legacy form. If you need to add supporting documents to a Unity form, you can do so only if the attachments option has been added to the Unity form. See Setting Property Controls for Attachments on page 194 for more information.

Select one of the following:

- **Add From OnBase** - Select to add a supporting document from OnBase.
- **Add From File** - Select to import a supporting document from the file system, a scanner, or a camera using the **Import** window.

Note: If a meeting has been run in Minutes, either an Administrator or a user with meeting write and edit privileges can add a document to an agenda item.

Supporting documents that have been attached to the selected agenda item are displayed beneath the agenda item in the **Meeting Agenda** pane. Double-click a supporting document to view it.

Right-click an attached document to see the following options:

- **Exclude document from packet**. This excludes a document when an agenda item packet is generated.
- **Remove packet from agenda item**. This removes the packet completely from the agenda item.
- **Mark file confidential**. This marks the attached document as confidential. This means that the file is included in the meeting packet, but is not part of the publishing process.

Once a document has been marked as confidential, the menu item changes to **Remove confidential mark** so you can change it back to it’s original status.

Note: Supporting documents added in Minutes view do not display in the Agenda view. See Viewing Meetings in Agenda or Minutes View on page 277 for more information.

Generate Agenda Item Packet

Click **Generate Agenda Item Packet** to generate a packet for the selected agenda item.

Note: Agenda Item Packets are not available in the Minutes view. The Generate Agenda Item Packet icon is inactive when in the Minute view. See Viewing Meetings in Agenda or Minutes View below for more information.

The **Agenda Item Packet Storage Options** window displays.

1. From the **Agenda Item Packet Template** drop-down list, select the template that will be used to generate the agenda item packet.
2. In **Output File**, specify where you will be saving the generated document.

   To save the document to OnBase, select the **OnBase Document Type** drop-down arrow, and then select the OnBase Document Type where the generated document should be stored. Specify any of the following:

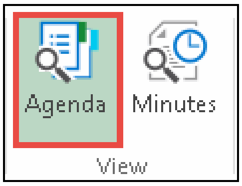
   - **Closed-session Document Type** - Select the OnBase Document Type where the generated closed-session document should be stored.
   - **File Type** - Select a file type.
3. In **Text Overlays**, specify any text overlays that should be used in the generated document.
4. Click **Save** to close the **Agenda Item Packet Storage Options** window and generate the packet.

Viewing Meetings in Agenda or Minutes View

You can view meeting items in the agenda both pre-meeting (Agenda view) and post-meeting (Minutes view). Since agenda items are often added, deleted and modified during a meeting, the pre-meeting view allows you to view the original agenda items prior to any changes being made.

To view the agenda pre-meeting:

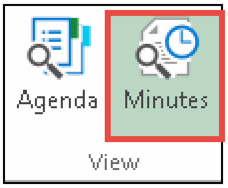
1. From the View ribbon, select the **Agenda** icon.



2. The original agenda items display as they were set up prior to the meeting.

To view the agenda post-meeting:

1. From the View ribbon, select the Minutes icon.



2. The agenda items display as they were modified post-meeting. You are also able to see any votes, motions and minutes that were recorded as the meeting took place. Note the following:

- You must have started, stopped and uploaded a meeting in Minutes in order to display post-meeting information. See the **OnBase Minutes** module reference guide for more information.
- If you selected the **Create Minutes View** icon, the Minutes view displays the original agenda, plus a roll call item under the first agenda section. See Viewing the Roll Call on page 283 for more information.
- You can modify items in the Item Information pane as needed. Any modifications you make in the Minutes view display only in the Minutes view. See Using the Item Information Pane on page 284 for more information.

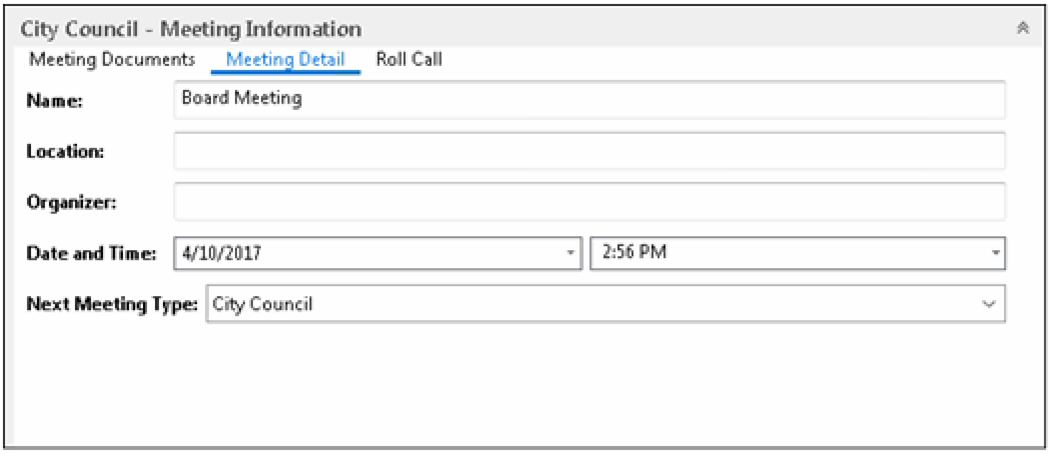
Using the Meeting Information Pane

The Meeting Information pane displays the following tabs:

- **Meeting Detail** - displays the details for the selected meeting.
- **Meeting Documents** - displays any Minutes, Agenda, Summary and Meeting Packet documents that have been generated for the selected meeting or added using the Add Meeting Document option.
- **Attendance** (Agenda View Only) - displays who the attendees are for the meeting. If a meeting has been run in Minutes, the attendance information is view-only.
- **Roll Call** (Minutes View Only) - displays the roll call list if one was added for the meeting. If a roll call does not exist for a meeting, the roll call tab is empty.

Modifying Meeting Details

You can view and modify a meeting's information through the **Meeting Detail** tab.



The following information can be modified:

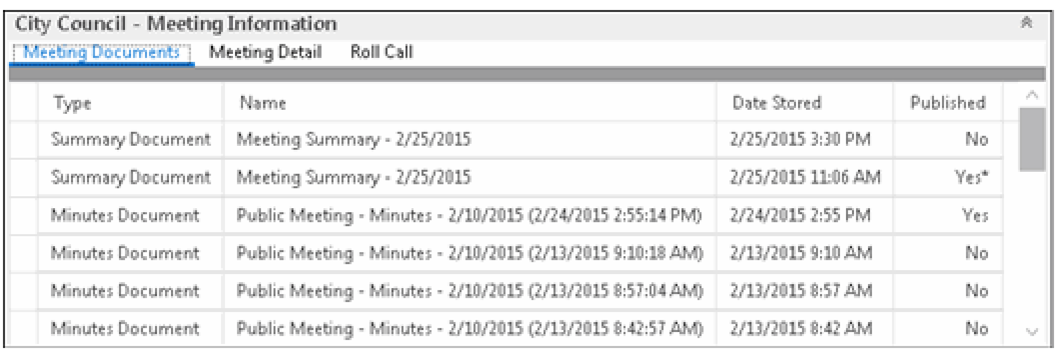
Meeting Detail	Description
Name	The name of the meeting.

Meeting Detail	Description
Location	The location of the meeting.
Organizer	The meeting's organizer.
Date and Time	The date and time of the meeting.
Next Meeting Type	The meeting type for the next meeting. Select the meeting you want from the drop-down list.

Viewing and Deleting Meeting Documents

You can view and delete documents that have been associated with the selected meeting through the **Meeting Documents** tab.

Note: Document names may be configured to use font attributes such as bold, italics and in color. These attributes are visible only in Agenda, not Agenda Online. See your system administrator for more information.



The **Meeting Documents** tab displays all of the documents that have been associated with the selected meeting, such as meeting packets or minutes documents.

Note: Supporting documents for agenda items are not displayed on the **Meeting Documents** tab. Supporting documents for agenda items are available in the **Meeting Agenda** pane.

The **Meeting Documents** tab includes the following columns:

Meeting Documents	Description
Type	The type of meeting document.
Name	The name of the meeting document.
Date Stored	The date the meeting document was stored.

Meeting Documents	Description
Published	Indicates whether the document has been published. Possible values include: • **No**. The document has not been published • **Yes**. The document has been published with attachments. • **Yes***. The document has been published without attachments. This does not mean that the document does not have available attachments, it means that the user chose to publish the document without attachments.

To view a meeting document, double-click the document name.

To delete a meeting document, right-click and select **Delete Document**. Click **Yes** to delete the document or **No** to retain the document.

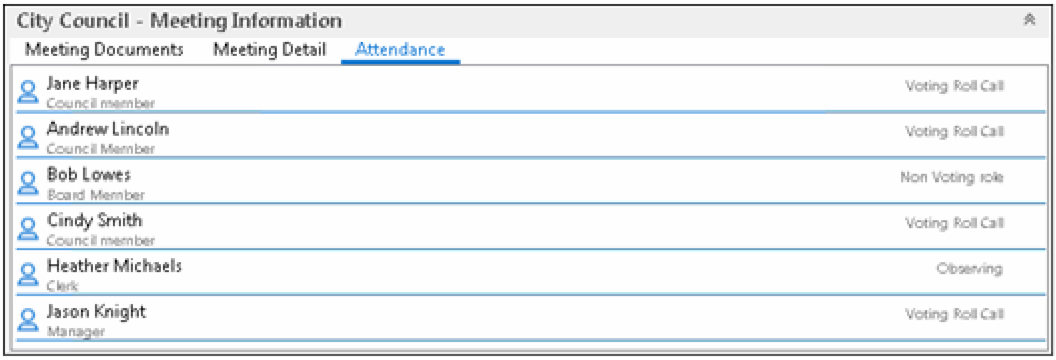
Note: Deleted meeting documents are sent to Document Maintenance. For more information, see the System Administration documentation.

Publishing Meeting Documents

Meeting documents can be published to the Agenda Online application so they can be viewed by the public. See the description for the **Publish** icon on page 272 for more information.

Meeting Attendance

You can use the **Attendance** tab to create a list of attendees for the selected meeting, as well as assign roles to each attendee.

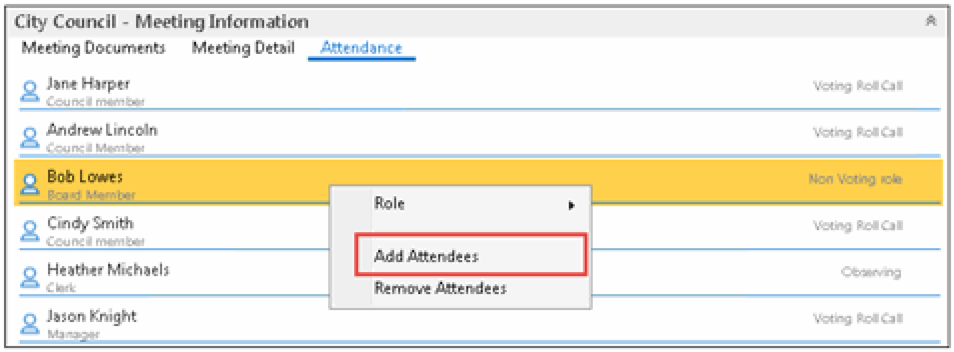


Note: The Attendance tab is only available in the Agenda View. If a meeting has been run in Minutes, you cannot modify the Attendance tab.

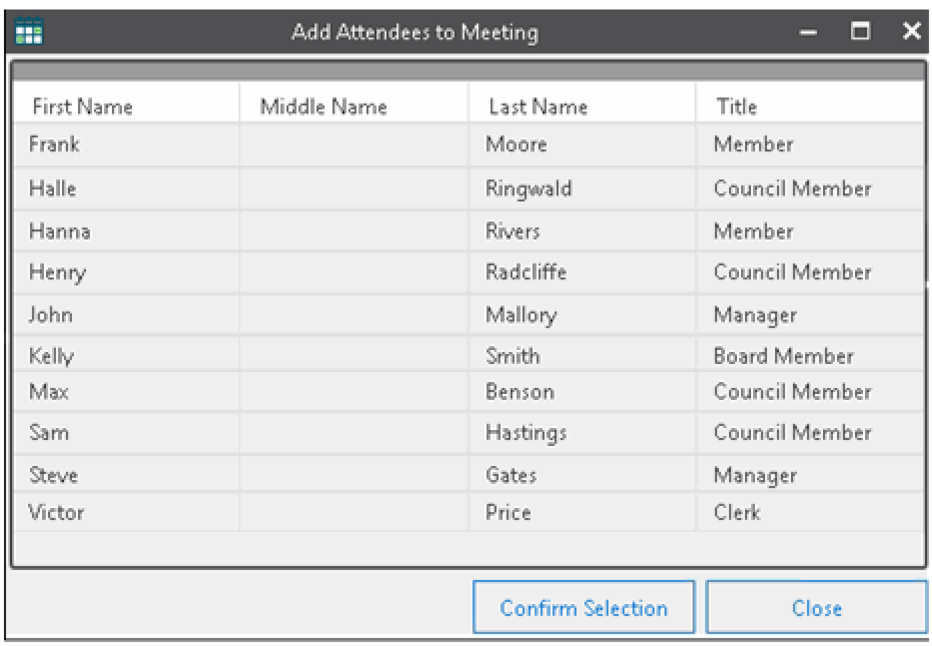
Adding Attendees to a Meeting

To add attendees for the selected meeting, follow these steps:

1. Right-click in the **Attendance** field and select **Add Attendees**.



The **Add Attendees to Meeting** window displays.



2. Select the name(s) of the attendees you want to add to the meeting.

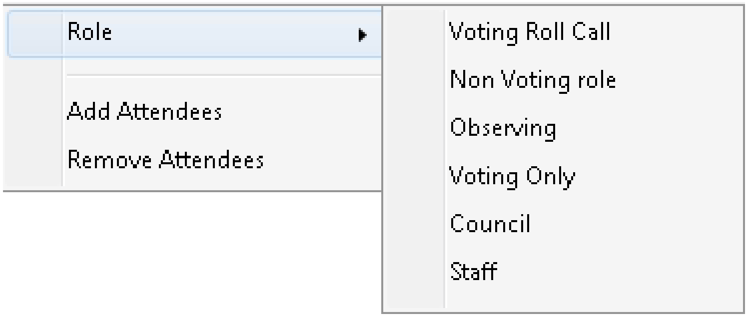
Tip: You can hold down **Shift** or **Ctrl** in order to select multiple attendees at the same time.

3. Click **Confirm Selection**. The selected attendee(s) are added to the meeting.
4. Click **Save Meeting**.

Modifying an Attendee’s Role

To modify an attendee’s role for the selected meeting, follow these steps:

1. Select one or more attendees from the **Attendance** field.
2. Right-click on one of the selected attendees and select **Role**. A list of pre-configured roles displays.



3. Select the role you want to assign to the selected attendee(s). You are prompted to confirm that you want to assign the role to the selected attendee(s) for the meeting.
4. Click **Yes** to assign the role to the selected attendee(s).
5. Click **Save Meeting**.

Removing Attendees from a Meeting

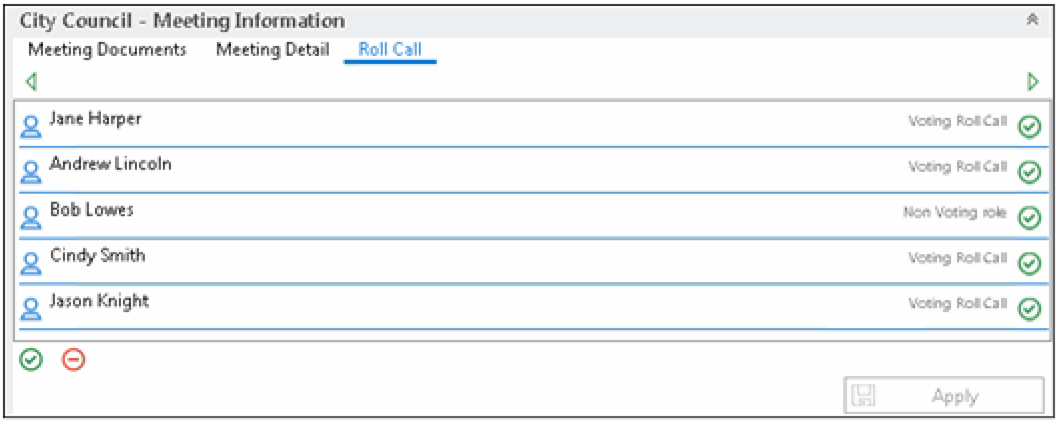
To remove one or more attendees from the selected meeting, follow these steps:

1. Select one or more attendees from the **Attendance** field.
2. Right-click on one of the selected attendees and select **Remove Attendees**. You are prompted to confirm that you want to remove the selected member(s) from the meeting.
3. Click **Yes** to remove the attendees from the selected meeting.
4. Click **Save Meeting**.

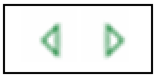
Note: You cannot remove all attendees from a meeting. The option to save the meeting is not enabled unless at least one attendee is assigned to the meeting.

Viewing the Roll Call

Once a meeting has been run in Minutes, the Roll Call tab is activated and displays the roll call for a meeting or agenda item if one was taken. If a roll call was not taken, the tab is empty.

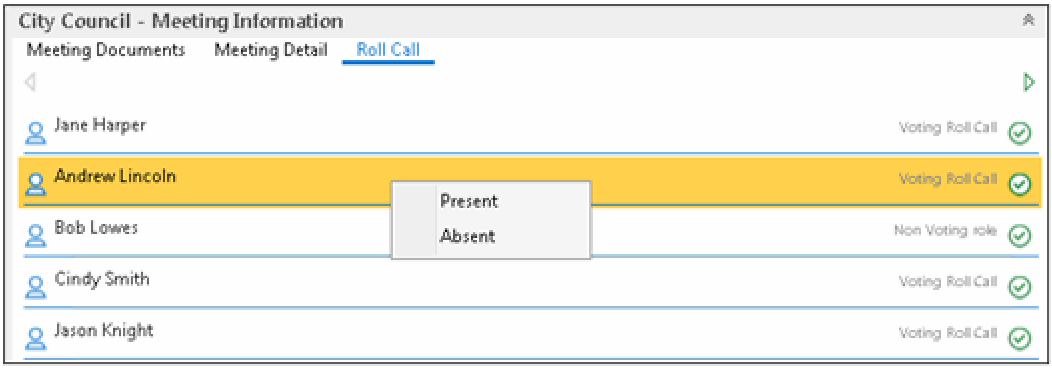


If multiple roll calls were taken during the meeting, the Roll Call displayed in the Roll Call tab is displayed in bold text in the meeting tree. Use the **Previous Roll Call** or **Next Roll Call** icons to view all roll calls taken during the meeting.



Note: The Roll Call tab is only available in the Minutes View. Information is also added to the Roll Call tab if you select the **Create Minutes View** option for meetings that occurred in the past.

If you need to modify a member's attendance at the meeting, right-click the member you want to modify, and then select the correct option.



The icon indicating the member's status is modified. Click **Apply** to save the changes to the roll call.

Note: The attendance status types can be configured to display the values you want. See Configuring Attendance Status Types on page 134 for more information.

Using the Item Information Pane

The **Item Information** pane displays information about the agenda section or item that is selected in the **Meeting Agenda** pane. It consists of the following tabs:

- Modifying a Meeting's Agenda Items (Agenda View Only)
- Modifying Motions (Minutes View Only)
- Modifying Minutes (Minutes View Only)
- Viewing Meeting Details (Agenda and Minutes View)

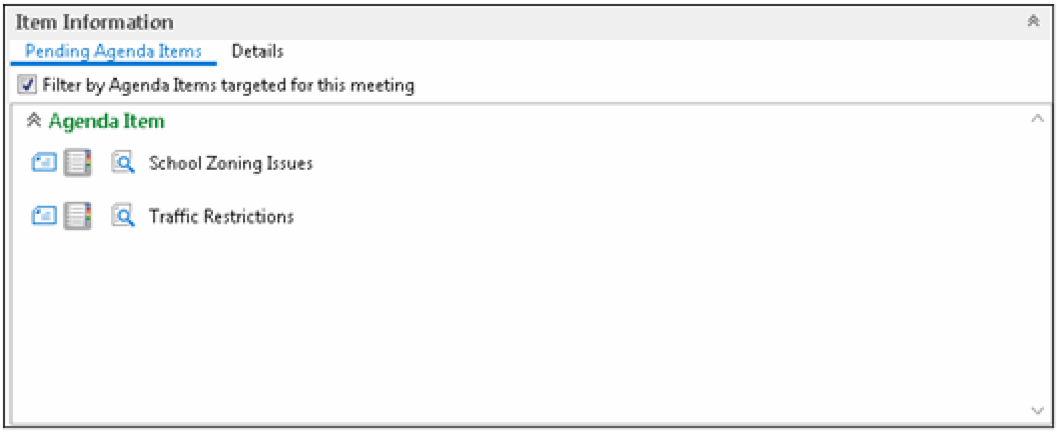
Note: The Motion and Minutes tabs display only after a meeting has been run in Minutes, or if the Create Minutes View option has been selected.

When working in the **Selection Information** pane, you can press **Ctrl+Tab** to switch to the next tab, or **Ctrl+Shift+Tab** to switch to the previous tab.

Modifying a Meeting's Agenda Items

You can view and add to the agenda any **Pending** agenda items that have been associated with the selected meeting through the **Pending Agenda Items** tab.

Note: This tab displays in Agenda View only.



Tip: Select the **Filter by Agenda Items targeted for this meeting** check box to filter the list of agenda items so that only agenda items targeted for the current meeting are displayed. If this option is not selected, the list of agenda items will include all pending agenda items for all available meetings.

Note: The **Pending Agenda Items** tab is empty if the meeting instance is a meeting type that was not configured with any associated agenda item types or if there are no agenda items of this type that are pending in the system.

To add a pending agenda item to an agenda:

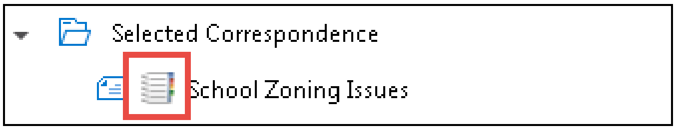
Note: You must have either Administrator rights or write rights to drag pending agenda items to an agenda.

1. Select a pending agenda item from the list.

Tip: You can view the details of a pending agenda item by selecting the **View Details** button.

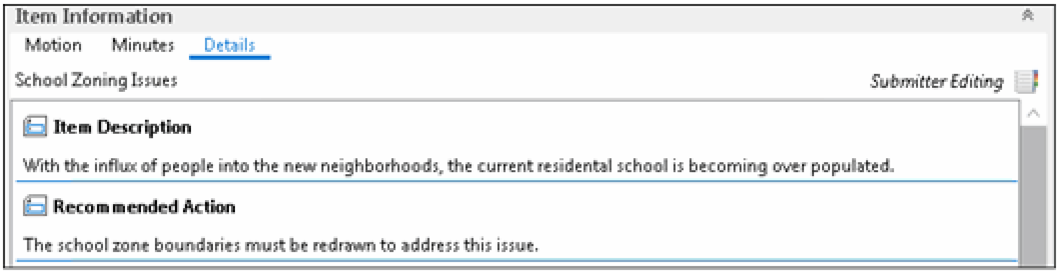
2. Drag it to a location in the **Meeting Agenda** pane.
   The agenda item is removed from the **Pending Agenda Items** tab.

3. If agenda items are configured with a status, an icon representing this status displays between the agenda item icon and agenda item name:



   Place your mouse over this icon to display a tooltip of the item's status.
4. When you are finished adding and ordering agenda items, click **Save Meeting**.

Viewing Agenda Items and Supporting Documents

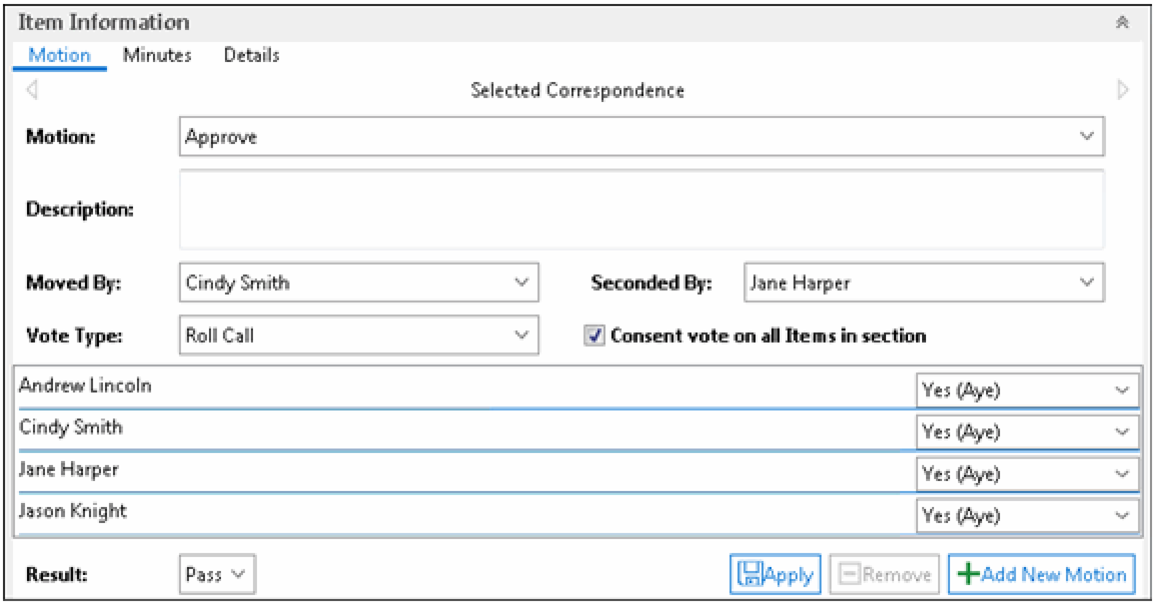


When an agenda section or supporting document is selected in the **Meeting Agenda** pane, the **Details** tab displays any related text.

When an agenda item is selected in the **Meeting Agenda** pane, the agenda item title displays in the upper left corner. If agenda items are configured with a status, the agenda item's status and status icon are displayed in the upper right corner. Place your mouse over this icon to display a tooltip of the item's status.

Modifying Motions

When an agenda section, agenda item, or supporting document is selected in the **Meeting Agenda** pane, the **Motion** tab displays voting functionality. The name of the selected item displays in the center of this tab. If a motion was recorded and voted on during the meeting, the results of the vote display and can be modified as needed.



Note: The Motion tab is available in the Minute View only.

When an agenda section is selected, the **Consent vote on all Items in section** icon is automatically selected to indicate that if the motion is applied when the section is selected, the motion will be copied to every agenda item in that section. This is commonly referred to as a consent vote, meaning consent to pass a motion on an entire list of items is assumed and can occur without discussion of each individual item.

Note: You will want to de-select this option if you edit a section that does not have any child items.

To record voting for an item, follow these steps:

1. From the **Motion** drop-down list, select one of the following motions:

Motion	Description
Approve	Select to approve the selected item.
Recommend Approval	Select to recommend approval of the selected item.
Table	Select to table the selected item.
Suspend	Select to suspend the selected item.
Refer to Committee/ Commission	Select to refer the selected item to a committee/commission.
Custom Motions	Select from any custom motions created in Minutes. These could have any value, depending on how they were created.

Note: If you created motion types in the Minutes application, those motions display in the drop-down list as well.

2. In the **Description** field, type a description of the motion you selected above.
3. From the **Moved By** drop-down list, select the member that introduced the motion.
4. From the **Seconded By** drop-down list, select the member that seconded the motion.

Note: The **Moved By** and **Seconded By** drop-down lists include members who have been assigned a voting role for the meeting on the **Attendance** tab. For more information on the **Attendance** tab, see Meeting Attendance on page 280.

5. From the **Vote Type** drop-down list, select one of the following vote types:

Vote Type	Description
Roll Call	Select if the vote is a roll call vote.
Voice	Select if the vote is a vocal vote.
Unanimous Consent	Select if the vote is a unanimous consent vote.

6. In the field below the **Vote Type** drop-down list, record the member's vote in the corresponding drop-down list. The following votes are available by default:

Vote	Description
No (Nay)	The member cast a “no” vote.

Vote	Description
Yes (Aye)	The member cast a "yes" vote. **Note:** This vote is selected by default.
Absent	The member was not present to vote.
Abstain	The member abstained from voting.
Recuse	The member recused themselves from voting.

Note: The vote types can be configured to display the values you want. See Configuring Vote Types on page 138 for more information.

You can also right-click a member's name in this field and select one of the above votes.

To record multiple votes:

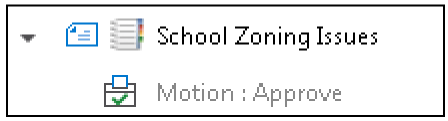
a. Hold down the **Ctrl** or **Shift** key and select members, or double-click to select all members.
b. Right-click and select one of the above votes.

7. From the **Result** drop-down list, select one of the following vote results:

Result	Description
Pass	The motion passed.
Pending	The motion is pending.
Fail	The motion failed.

Note: The motion result types can be configured to display the values you want. See Configuring Motion Result Types on page 136 for more information.

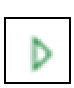
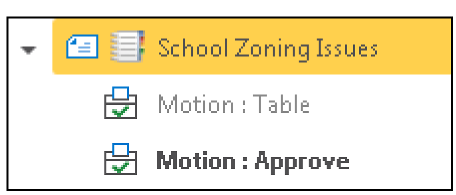
8. Do one of the following:
    - To record the motion, click **Apply** or press **Alt+S**.
    - To remove the motion, click **Remove** or press **Alt+R**.
9. The motion displays in the **Meeting Agenda** pane, in the following format: **Motion : [Motion drop-down list selection]**:

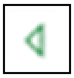
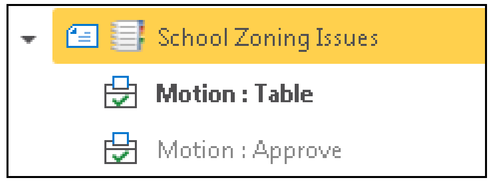


The icon that corresponds to the motion reflects the vote result:

Icon	Description
	Indicates that the motion passed (**Pass** was selected from the **Result** drop-down list).
	Indicates that the motion is pending (**Pending** was selected from the **Result** drop-down list).
	Indicates that the motion failed (**Fail** was selected from the **Result** drop-down list).

Note the following:
- The motion displays before any supporting documents.
- For agenda sections that were voted upon, the motion is copied to each agenda item in that section if the **Consent vote on all items in section** check box is selected. Otherwise only the parent section is updated.
- For agenda items or sections that contain multiple motions the following buttons are available:

Button	Description
	Click, or press **Alt+Right Arrow**, to navigate to the next motion. The motion that is selected displays in bold in the **Meeting Agenda** pane: 

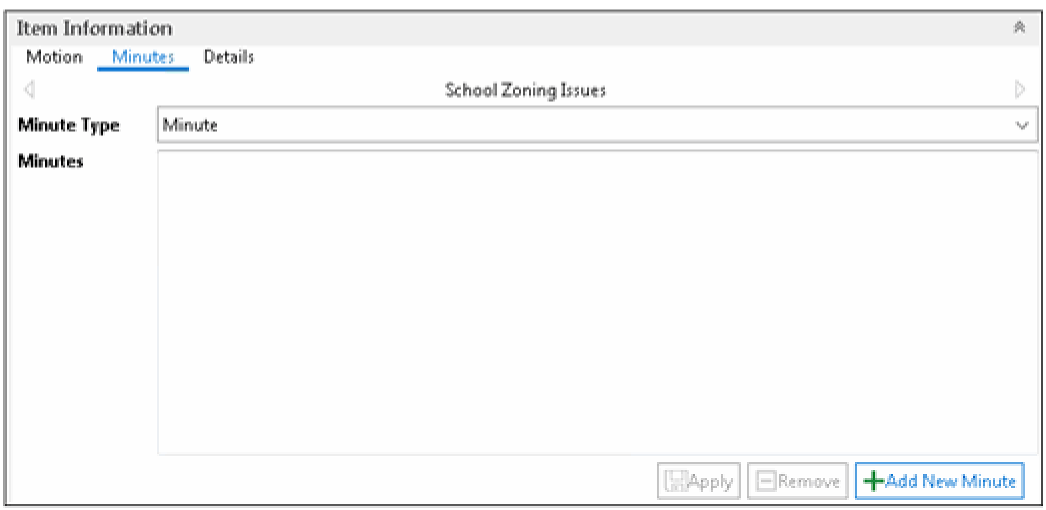
Button	Description
	Click, or press **Alt+Left Arrow**, to navigate to the previous motion. The motion that is selected displays in bold in the **Meeting Agenda** pane: 

To add a new motion, click **Add New Motion** or press **Alt+A**.

Modifying Minutes

When an agenda section or agenda item is selected in the **Meeting Agenda** pane, the **Minutes** tab is available to enter minutes information.

Note: The Minutes tab is available in the Minutes View only.



To enter a minute, note or action:

1. Select the item in the meeting tree for which you want to enter a minute, note or action.
2. Select the drop-down list in the **Minute Type** field.
3. Select to record either a Minute, Note or Action.

4. Type the text for the item you selected in step 2, and then click **Apply**. The minute, note or action you entered displays under the item you selected.

   Depending on the Minute Type you selected, you will see one of the following icons in the Agenda tree:

Icon	Description
	Indicates that a Minute has been entered for the agenda item.
	Indicates that a Note has been entered for the agenda item.
	Indicates that an Action has been entered for the agenda item.

If you need to add another minute to the same item, select **Add New Minute** and complete steps 1 - 4 to add another minute, note or action.

If you need to remove a minute note or action, select it from the meeting tree, and then click **Remove**.

Note: Spell check is automatically enabled in the text field on the **Minutes** tab. Misspelled words are underlined in red. Right-click a misspelled word for a list of possible replacement words. Select **Ignore All** to ignore the misspelled word.

If you need to edit a minute:

1. Select the minute you want to edit from the agenda tree.
2. Type the text in the Minutes tab, and then click **Apply**.

Viewing Item Details

You can view the details of a section or item in the Details tab.

You can view the following information about an item, depending on what you selected in the meeting tree:

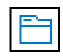
- **Section** - if any section text was entered, the text displays in the Details tab. You can double-click the text to make changes if necessary. See Working with Agenda Sections below to learn how to add text to a section in the tree.
- **Item** - if any information is available for an agenda item, it displays in the Details tab. Right-click on the information to edit or remove as needed.

Using the Meeting Agenda Pane

If the meeting instance is a meeting type that was configured to use an agenda outline template, the agenda outline displays in the **Meeting Agenda** pane. If you associate a blank agenda outline template with a meeting type, a blank **Meeting Agenda** pane displays.

Working with Agenda Sections

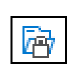
In the **Agenda** folder, a folder icon is used to designate an agenda section.

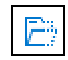


Agenda sections can be created or modified in the **Agenda** field.

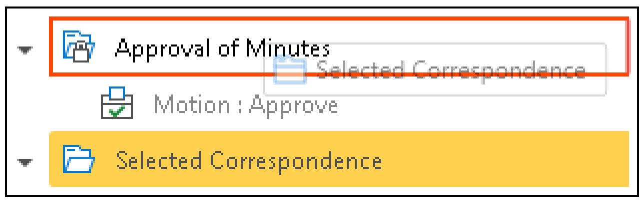
To create a new agenda section, right-click in the **Meeting Agenda** pane and select **New Section**. Type a name for the new agenda section.

The following options are available when right-clicking on an existing agenda section:

Option	Description
Edit	Select, or press **F2**, to edit the agenda section name and number.
Delete	Select, or press the **Delete** key, to delete the agenda section. Click **Yes** to delete the agenda section, or **No** to retain the agenda section.
New Sub Section	Select to add a new subsection to the agenda section. Type a name for the new subsection.
New Section Text	Select to add text from pre-configured agenda item fields to the agenda section's **Details** tab.
Closed Session	Select to mark an agenda section as a closed session. Closed session sections appear as a folder icon with a lock.  **Note:** The **Closed Session Access** security privilege is required to view or modify closed session agenda sections. Depending on your system's configuration, closed session agenda item supporting documents may be replaced by a single blank page when the packet is generated. To remove a closed session marking, reselect this option.

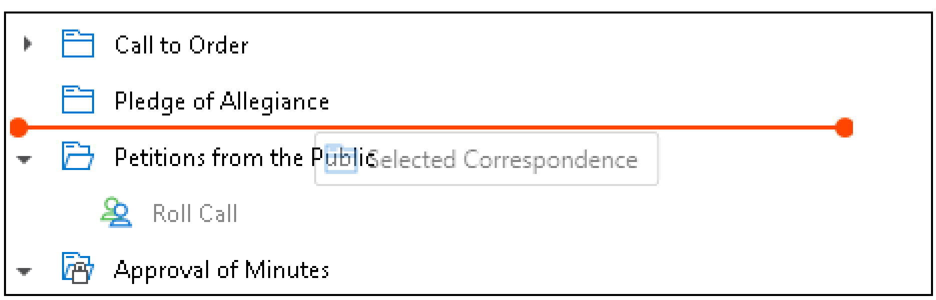
Option	Description
Hide Section If Empty	Select to hide the Agenda Section if there are no agenda items, minutes or motions in it. A section marked to be hidden appears as a partial folder. 

To establish a parent/child relationship between agenda sections, drag-and-drop one agenda section into another agenda section:



Agenda sections can also be reordered by dragging-and-dropping:

Note: In the Agenda View, Administrators only have the ability to re-arrange items post-meeting.

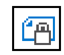
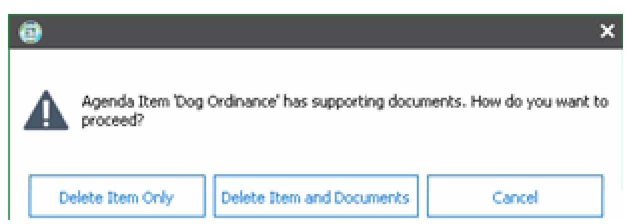


Note: If the meeting instance is a meeting type that was configured to use an agenda outline template, any modifications made to the agenda outline template in the **Agenda** field are not reflected in the corresponding agenda outline template.

Working with Agenda Items

In the **Meeting Agenda** pane, an agenda item is designated with a paper icon.

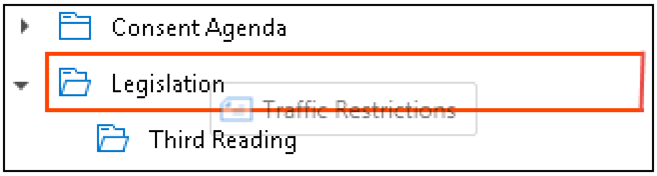
The following options are available when right-clicking on an existing agenda item:

Option	Description
Closed Session	Select to mark an agenda item as a closed session. Closed session agenda items appear as a paper icon with a lock.  **Note:** The **Closed Session Access** security privilege is required to view or modify closed session agenda sections. Depending on your system's configuration, closed session agenda item supporting documents may be replaced by a single blank page when the packet is generated. To mark a closed session agenda section as open session, reselect this option.
Delete	Select **Delete** to delete the agenda item. **Note:** Once an agenda item has been added to a meeting, it can be deleted by any users with the **Write/Edit** security setting for the meeting type as long as a motion has not been recorded on the item. If the agenda item does not contain supporting documents or motions, you are prompted to confirm that you want to delete the agenda item. Click **OK** to delete the agenda item. If the agenda item contains supporting documents, the following message box is displayed:  • Click **Delete Item Only** to delete the agenda item and retain the supporting documents. • Click **Delete Item and Documents** to delete the agenda item and any supporting documents.

You can also move agenda items to another section in the agenda, reorder agenda items within sections, and view the agenda item details.

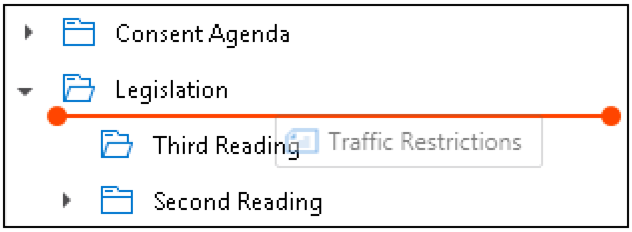
Move an Agenda Item to Another Section

To move an agenda item to another section within the agenda, drag-and-drop it into another agenda section:



Reorder Agenda Items Within Agenda Sections

Agenda items can also be reordered under an agenda section by dragging-and-dropping:

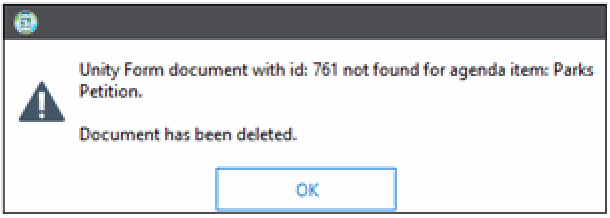


Note: If a meeting has been run in Minutes, you cannot drag-and-drop items or sections in the Agenda view, unless you have full administrator rights. Also, you cannot drag-and-drop motions or minutes in Agenda. If you need to rearrange motions and minutes, you must open the Minutes application and rearrange the items there instead.

View Details for Agenda Items

To view details for an agenda item, double-click on the item. The Agenda Item details window is displayed. The appearance of the window may vary depending on if the agenda item was created with a legacy for or a Unity form.

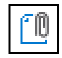
If the agenda item was created with a Unity form, and the form was deleted in Unity, a message box is displayed indicating that the form has been deleted.



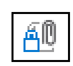
Note: A similar message is displayed if the form was purged from Unity.

Working with Supporting Documents

In the **Meeting Agenda** pane, a paper clip icon is used to designate a supporting document.



The following options are available when right-clicking a supporting document:

Option	Description
Exclude Document from Packet	Select to exclude a supporting document from the generated meeting packet. The document's icon changes to the following:  To include the supporting document in the generated meeting packet, right-click and select **Include Document in Packet**.
Remove Packet from Agenda Item	Select to remove a packet from the agenda item completely.
Mark File Confidential	Select to mark the supporting document as confidential. When a meeting document is generated, this file does not display as a link in the PDF version of the document, or in the Agenda Online application. The document's icon changes to the following:  Note the following when generating a closed session packet: • Files that are marked as confidential do display in a closed session agenda packet. • Files marked as confidential and excluded do not display in a closed session agenda packet or in Agenda Online. • Files marked as excluded only (not marked as confidential) do not display in a closed session agenda packet.

Note: Supporting documents can be reordered by dragging-and-dropping.

Generating Meeting-Related Documents

You can generate certain meeting-related documents such as agenda documents or meeting packets (including supporting documents).

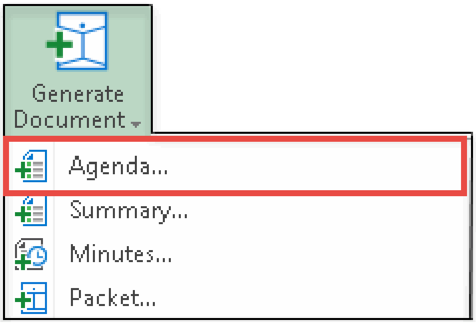
From an open meeting, click the **Generate Document** button from the **Meeting** ribbon.

Select an existing template from the drop-down portion of the button to generate a document or packet, or reconfigure an existing template for your purposes. For more information on reconfiguring an existing template, see the following sections:

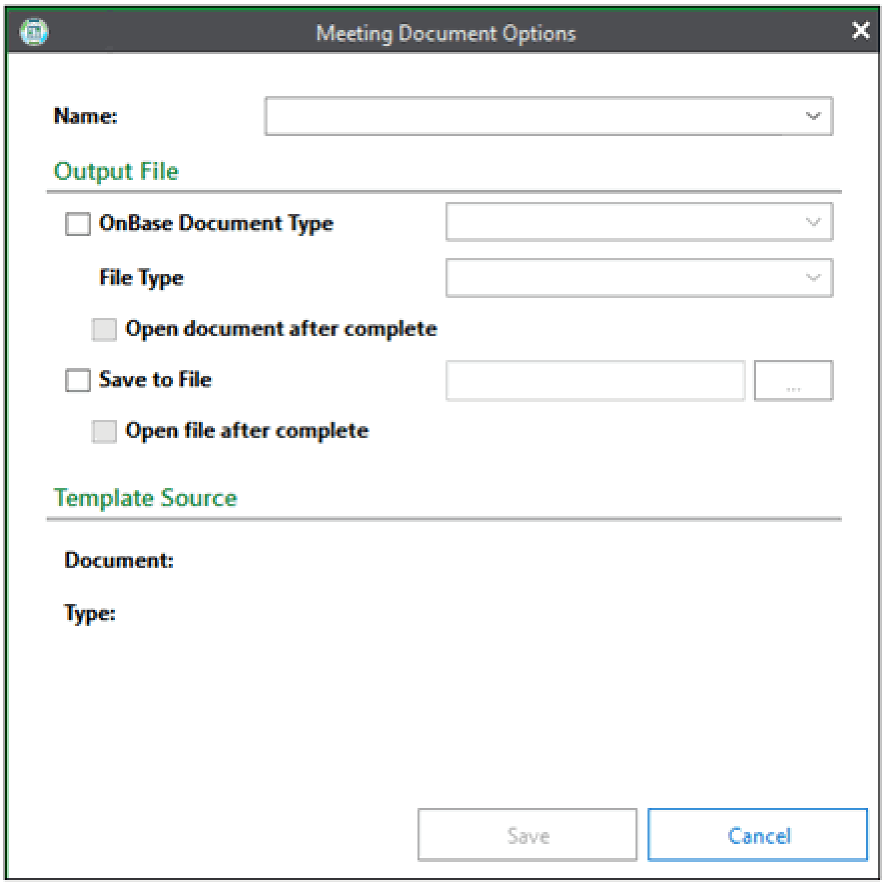
- Generating an Agenda Document on page 299
- Generating a Meeting Packet on page 305
- Generating a Summary Document on page 301
- Generating a Minutes Document on page 303

Generating an Agenda Document

1. From an open meeting, click the drop-down portion of the **Generate Document** button.
2. Select **Agenda**.



The **Meeting Document Options** dialog box is displayed:



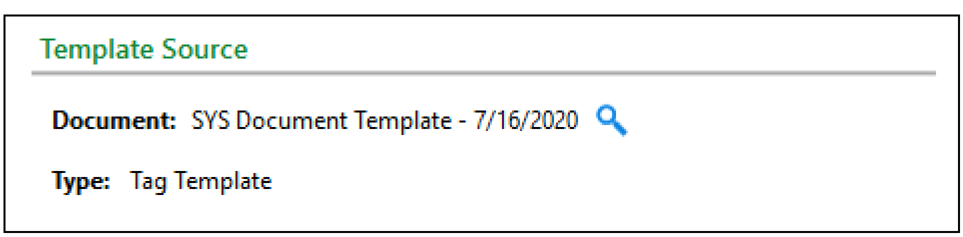
3. From the **Name** drop-down list, select the template that will be used to generate the agenda document.

4. Specify any of the following **Output File** options:

Output File	Description
OnBase Document Type	To save the document to OnBase, select this check box and select the OnBase Document Type where the generated document should be stored.
File Type	Select a file type.
Open document after complete	Select to open the agenda document after generation.
Save to File	To save the document to an external location, select this check box and specify a location to save the file. You can also click **...** to browse to a location.
Open file after complete	Select to open the agenda document after generation.

5. In the **Template Source** section, note the following:
   - If the template was created **without** an OnBase document assigned to it, the template **Type** and document **Path** is displayed. The **Document** field displays as **None**, indicating that an OnBase document was not assigned to this template.

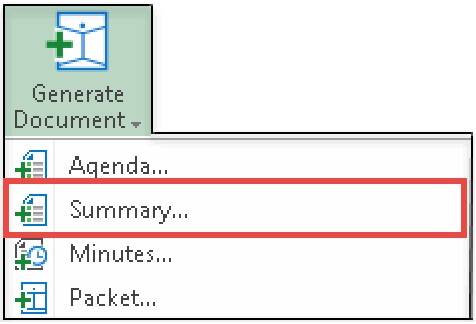
   - If the template was created **with** an OnBase document assigned to it, the **Document** field displays the document name as listed in OnBase, along with the template **Type**. You can click the **View** icon to view the document in the document **Viewer**.



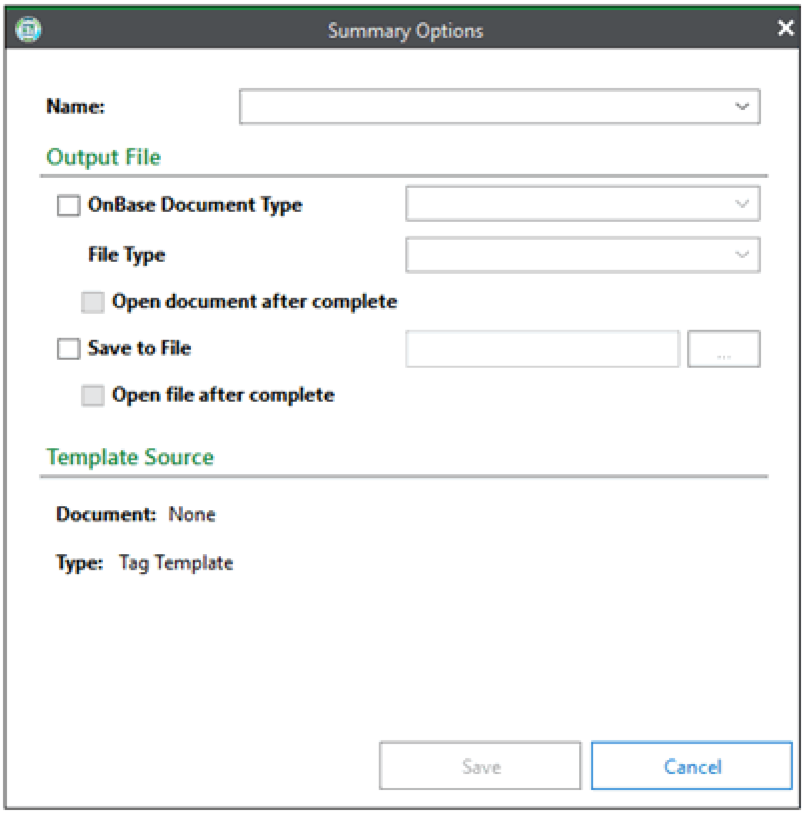
6. Click **Save**.

Generating a Summary Document

1. From an open meeting, click the drop-down portion of the **Generate Document** button.
2. Select Summary.



The **Summary Options** dialog box displays.



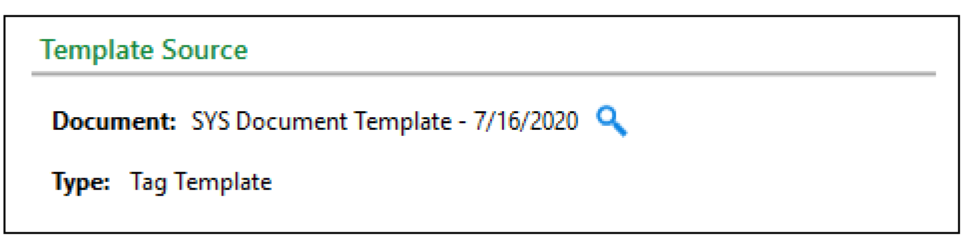
3. From the **Name** drop-down list, select the name template that will be used to generate the summary document.

4. Specify the following **Output File** options:

Output File	Description
OnBase Document Type	To save the summary document to OnBase, select this option and specify the OnBase Document Type where the generated document should be stored.
File Type	Select a file type.
Open document after complete	Select this option to open the summary document after generation.
Save to File	To save the summary document to an external location, select this option and specify a location to save the file. You can also click the **...** button to browse to a location.
Open file after complete	Select this option to open the summary document after generation.

5. In the **Template Source** section, note the following:
   - If the template was created **without** an OnBase document assigned to it, the template **Type** and document **Path** is displayed. The **Document** field displays as **None**, indicating that an OnBase document was not assigned to this template.

   - If the template was created **with** an OnBase document assigned to it, the **Document** field displays the document name as listed in OnBase, along with the template **Type**. You can click the **View** icon to view the document in the document **Viewer**.

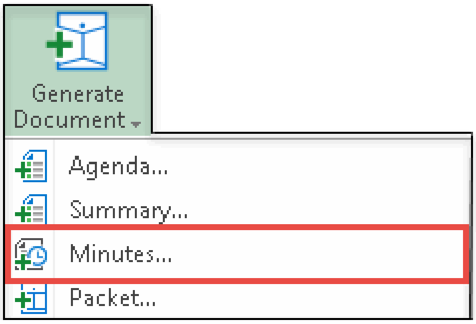


Note: The only available template **Type** is Tag Template.

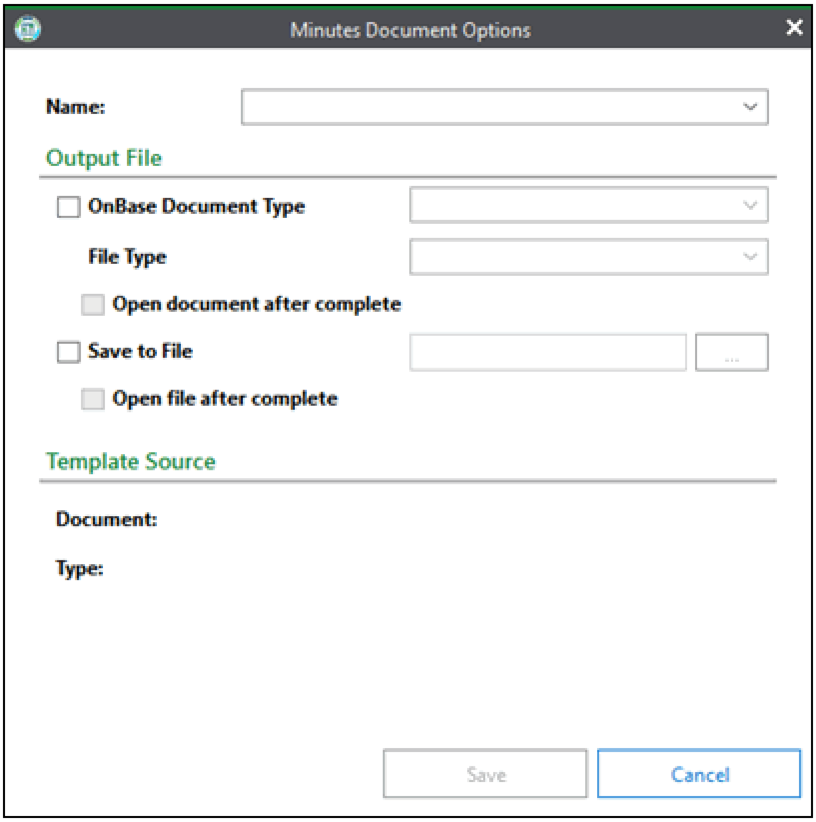
6. Click **Save**.

Generating a Minutes Document

1. From an open meeting, click the drop-down portion of the **Generate Document** button.
2. Select **Minutes**.



The **Minutes Document Options** dialog box displays:



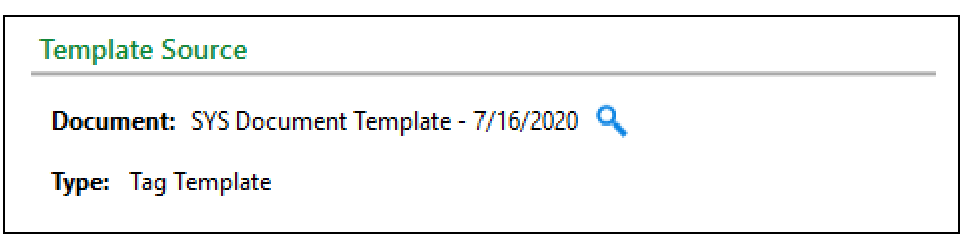
3. From the **Name** drop-down list, select the name template that will be used to generate the minutes document.

4. Specify the following **Output File** options:

Output File	Description
OnBase Document Type	To save the minutes document to OnBase, select this option and specify the OnBase Document Type where the generated document should be stored.
File Type	Select a file type.
Open document after complete	Select this option to open the minutes document after generation.
Save to File	To save the minutes document to an external location, select this option and specify a location to save the file. You can also click the **...** button to browse to a location.
Open file after complete	Select this option to open the minuted document after generation.

5. In the **Template Source** section, note the following:
   - If the template was created **without** an OnBase document assigned to it, the template **Type** and document **Path** is displayed. The **Document** field displays as **None**, indicating that an OnBase document was not assigned to this template.

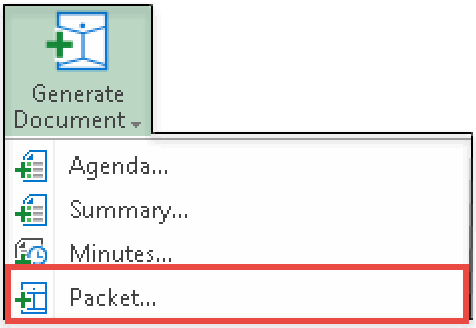
   - If the template was created **with** an OnBase document assigned to it, the **Document** field displays the document name as listed in OnBase, along with the template **Type**. You can click the **View** icon to view the document in the document **Viewer**.



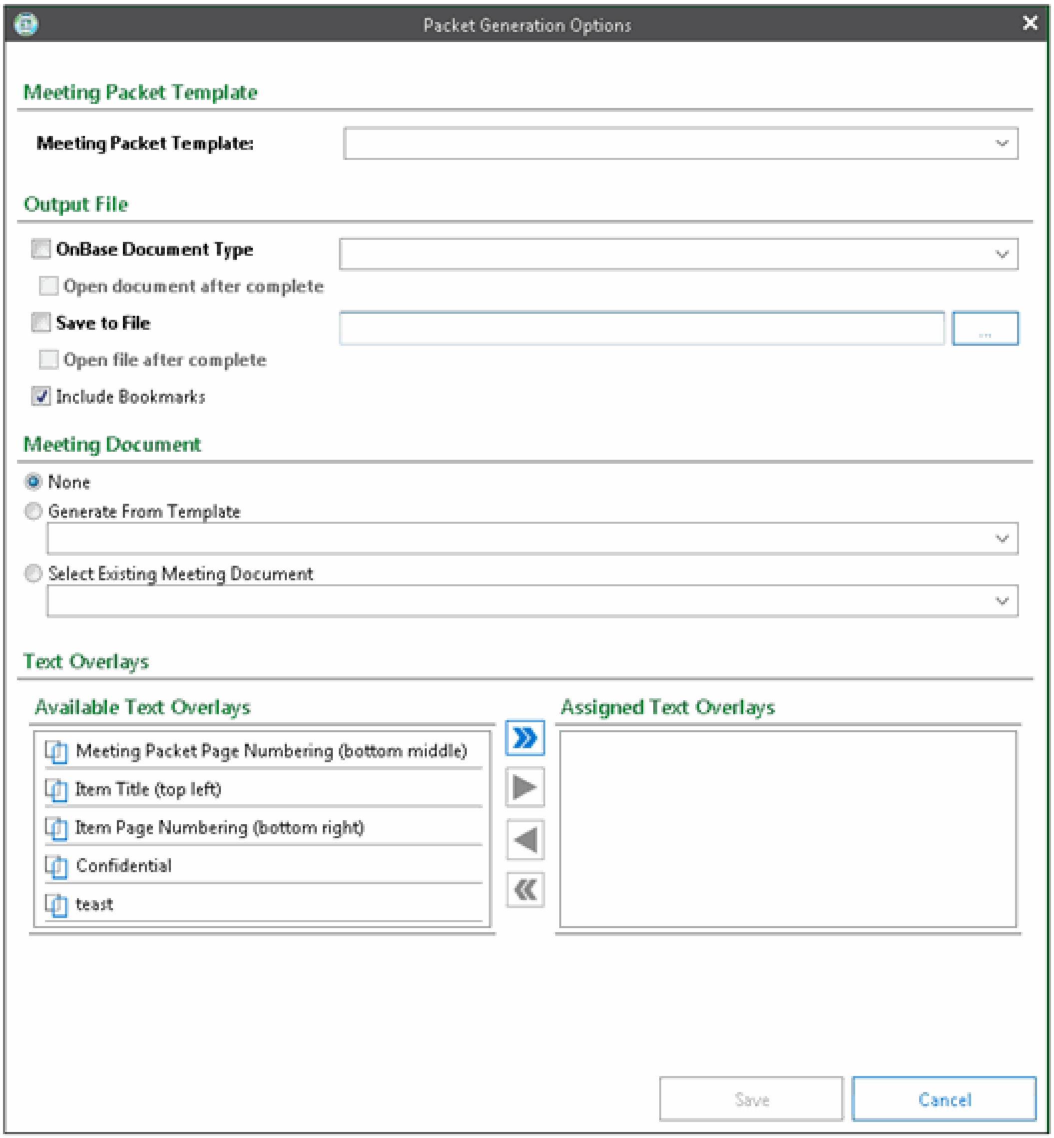
6. Click **Save**.

Generating a Meeting Packet

1. From an open meeting, click the drop-down portion of the **Generate Document** button.
2. Select **Packet**.



The **Packet Generation Options** dialog box displays:



3. From the **Meeting Packet Template** drop-down list, select the template that will be used to generate the meeting packet.
4. Specify the following **Output File** options:

Output File	Description
OnBase Document Type	To save the meeting packet to OnBase, select this option and specify the OnBase Document Type where the generated packet should be stored.
Open document after complete	Select this option to open the meeting packet after generation.

Output File	Description
Save to File	To save the meeting packet to an external location, select this option and specify a location to save the file. You can also click the **...** button to browse to a location.
Open file after complete	Select this option to open the meeting packet after generation.
Include Bookmarks	Select this option to include bookmarks when generating the meeting packet. You can view bookmarks in Microsoft® Word. To view the bookmarks in the document, open the Options menu in Word, select the Advanced tab and then select the Show Bookmarks option in the Show Document Content section. Bookmarks display with [] around them.

5. Select one of the following **Meeting Document** options:

Agenda Document	Description
None	Select this option if you do not want to include an agenda or minutes document with your meeting packet.
Generate From Template	Select this option if an agenda or minutes document should be generated and included with your meeting packet. The agenda or minutes document will be created based on the specified Agenda or Minutes Template.
Select Existing Meeting Document	Select this option if an existing agenda, minutes, or supporting document should be included with your meeting packet. The selected agenda, minutes, or supporting document will be included when your meeting packet is generated.

6. If necessary, select a text overlay from the list of **Available Text Overlays** and move it to the **Assigned Text Overlays** field.
7. Click **Save**.

File Menu

The File menu is used to open previously used layouts and access administrative functionality. After clicking the File menu, the File menu options display. Depending on your configuration and rights, the File menu may contain:

Button	Description
Hyland Community	Click to open the OnBase Community website.

Button	Description
Agenda Administration	Click to open the Agenda Administration screen. This screen allows you to define configuration options for Agenda Items, the Meeting Body, Document Templates, Packet Configuration, Meeting Types, Types and Public Access.
Forms Designer	Click to access the Unity Forms Designer application. See Accessing the Designer on page 187 for more information.
Troubleshooting	Click to select from the following: • **Troubleshooting** - Click to show troubleshooting information. The **Troubleshooting Messages** pane displays the **Timestamp**, **Type**, and **Message** for each message. You can export the contents of the **Troubleshooting Messages** pane by clicking **Save to File**, or clear the contents of the pane by clicking **Clear Log**. **Note:** The Troubleshooting Messages log is limited to 20 MB. To create a bug report from this layout, right-click and select **Create Bug Report**. In the **Create Bug Report** dialog box, specify your name, email address, select whether or not you wish to include a screenshot, and provide a detailed description of the issue you encountered. Click **Save To Desktop**, and send the corresponding file (**Hyland_BugReport.zip**) to your OnBase system administrator. • **Request Log** - Click to show the request log. A request is a web service call to the OnBase Application Server. The **Request Log** dialog box displays the **Log Time**, **Request Path**, and **Message** for each request. You can export the contents of the **Request Log** dialog box to a CSV file by clicking **Save To File**, or clear the contents of the dialog box by clicking **Clear Log**.
User Options	Click to configure user options in the **User Options** dialog box.
Administration	This menu displays rights-based, permissions-based, and license-based administration and configuration modules. • **User Administration** - Click to perform user administration from the **User Administration** layout. **Note:** See the User Administration topic in the Unity Client help files for more information. • **Manage Locks** - Click to manage document, Disk Group, or process locks using the **Manage Locks** dialog box. **Note:** See the Managing Locks topic in the Unity Client help files for more information.

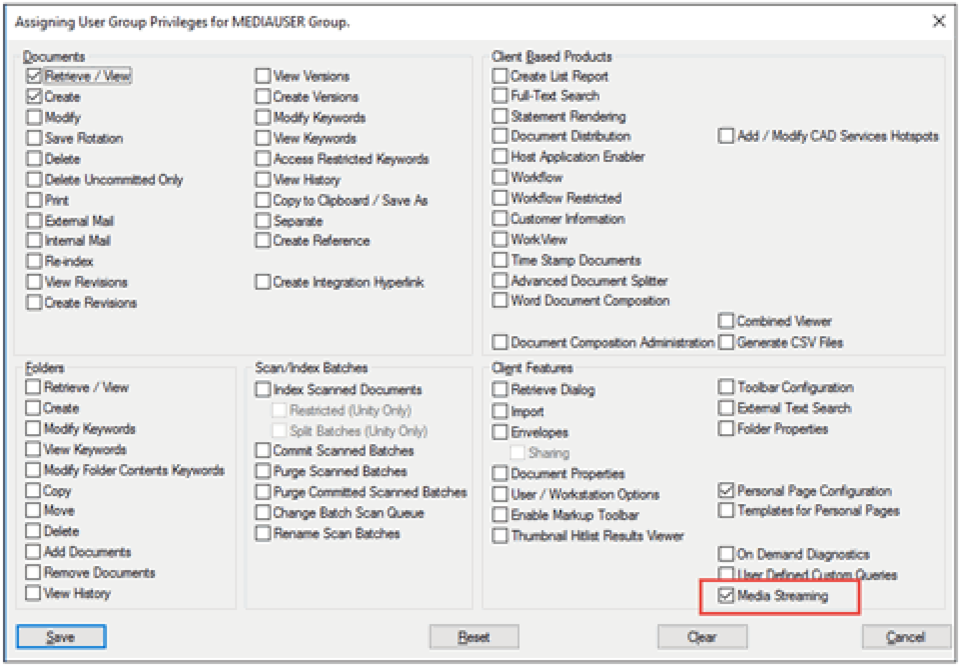
<table>
<tr><th>Button</th><th>Description</th></tr>
<tr><td>Change Password</td><td>Click to change your OnBase password.
Note: See the Change Password topic in the Unity Client help files for more information.</td></tr>
<tr><td>Recent Activities</td><td>Select one of your recent activities from the list to return to that layout.</td></tr>
<tr><td>Help</td><td>Click to select from the following:
Help - Click to open the Unity Client help files.
About OnBase - Click to open the About screen. Here you can find the version of OnBase you are running and the associated Copyright information.
From this screen, you can also view Connection Information such as FriendlyName, Data Source, and the App Server URL.</td></tr>
<tr><td>Log Out</td><td>Click to log off and log back in as a different user.
If you stored your log on credentials using the Remember me on this computer check box, clicking this button clears these stored credentials. You will be required to enter your OnBase user name and password the next time you log on.</td></tr>
<tr><td>Exit Agenda</td><td>Click Exit Agenda to log off and exit the Agenda application.</td></tr>
</table>

Note: The ADMINISTRATOR user, MANAGER user, and users that are part of a User Group with the **Usergroup Security** or **User Configuration**. Configuration Right also have access to the **OnBase Software Communitie**s button. Click this button to open the OnBase Software Community web site in your web browser.

Using Agenda Online

The Agenda Online portal allows you to view public meetings on a Web site that have been published to the portal from Agenda. This provides the public the ability to view agenda, minutes, summary, and agenda and minute packet documents associated with the meetings. You can customize the portal using the Public Access options in the Administration tool. See Configuring Agenda Online on page 139 for more information.

Before you can share media to the general public, you must ensure that your user is assigned to the User Group in OnBase Configuration that has the **Media Streaming** privilege enabled.



See the **Agenda Media** module reference guide for more information.

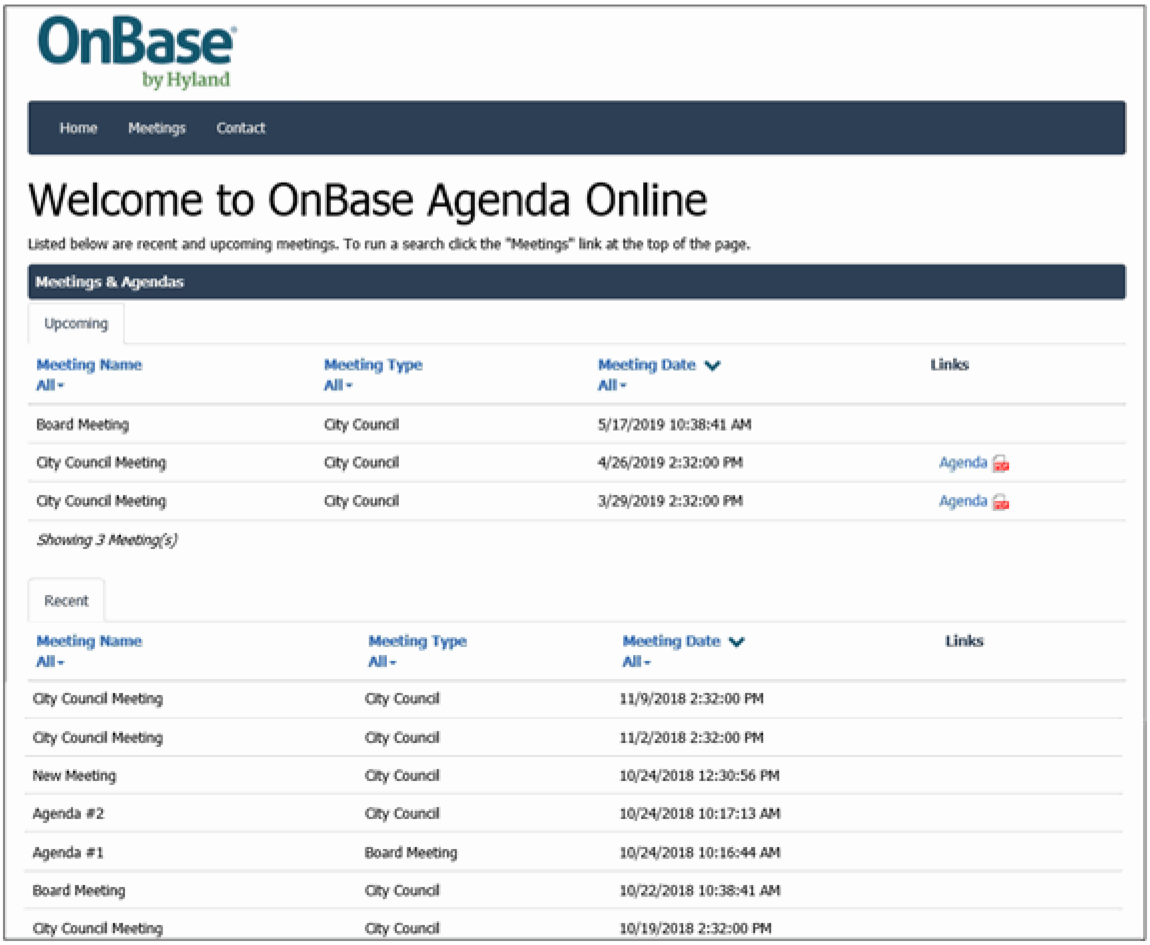
Accessing the Agenda Online Portal

Before you can access the portal, you must have installed the application. See Agenda Online Installer on page 50 for more information. Once you have installed the application, you can view the portal using your Web browser. Compatible browsers include Internet Explorer, Firefox, Google Chrome, and Safari as well as access on your iPad or iPhone using Safari, access on your Android using Android Chrome or access on your Windows device using Internet Explorer.

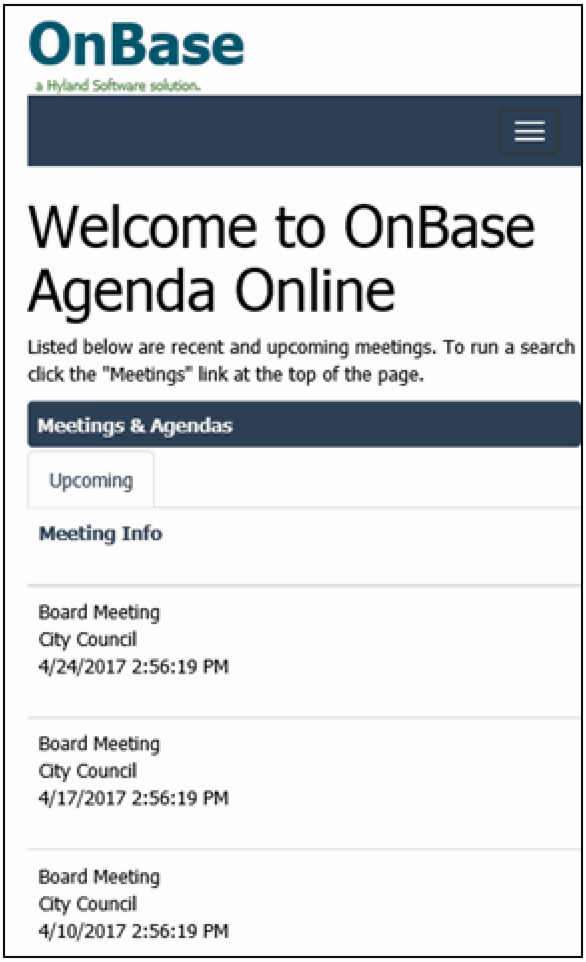
To access the portal, enter the following URL on the subject line in your browser:

http://<localhost>/OnBaseAgendaOnline

The portal displays in your browser.



If your screen is minimized, the meetings and published documents display in a condensed view.



Note: The colors of the screen elements may vary depending on if you used the Page Style options in the Agenda Administration tool to customize the look and feel. See Configuring Attendance, Motion and Vote Types on page 134 for more information.

Viewing Public Meetings

The Agenda Online portal provides the ability to view a list of meetings and perform a full-text search of meetings and meeting documents. The portal screen may have two meeting tabs, one for **Upcoming** meetings, and the other for **Recent** meetings.

Viewing Meetings in Agenda Online

Meetings display on the Home page of the portal. The number of meetings that display is dependent on the **Initial Meeting List Range Display Options** in the Public Access ribbon from the Agenda Administration tool. See Configuring Agenda Online on page 139 for more information.

View the number of meetings returned at the bottom of the screen:

Public users will have the ability to see all meetings regardless of the security settings on the meeting type. However, if a meeting has supporting documents that have not been published, the documents do not display in the meeting list, only the meeting name displays.

Note: If a **Public Meeting Name** has been configured for the meeting type, the public meeting name displays in the meeting list. Otherwise, the meeting type name displays. See Creating a Meeting Type on page 100 for more information.

Filtering and Sorting Meetings

Meetings in the meeting list can be sorted by Meeting Name, Meeting Type and Meeting Date. Meetings can also be placed in either the Recent tab or the Upcoming tab. See Configuring Agenda Online on page 139 to display upcoming meetings separately.

To filter and sort meetings:

1. Meetings are filtered using the **All** drop-down list next to each header.

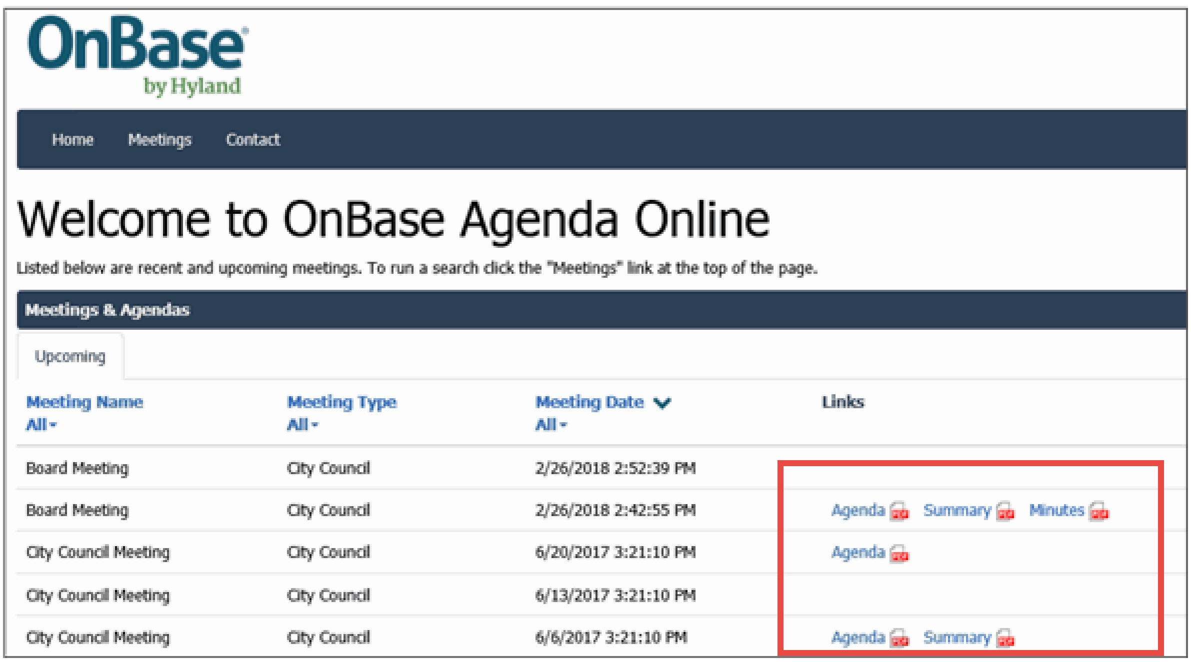
2. When the **All** drop-down list is selected, a list of options under a specific header is displayed.

3. Select an available option from the list. Meetings are filtered and results are displayed in the list. Select **All** to view all meetings if necessary.

4. Meetings can only be sorted by Meeting Date. Select the drop-down arrow next to the **Meeting Date** header to sort meetings from either new to old or old to new.

Viewing Meeting Documents

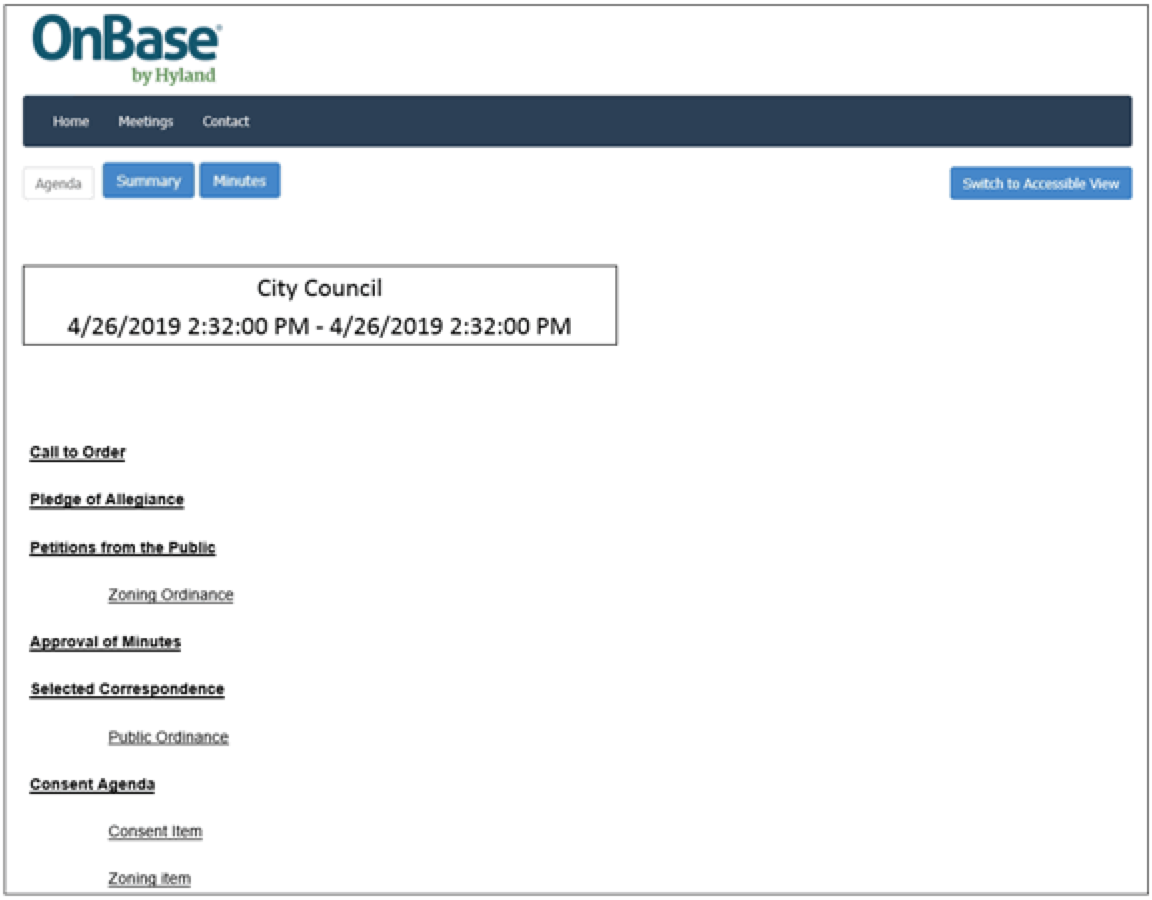
If a meeting has documents that have been published in Agenda, a link displays next to the meeting along with the title of the document (Agenda, Minutes, Summary, Agenda Packet or Minutes Packet).



You can either select the link of the document name to view more information, or you can select the PDF icon next to the link to view and save the PDF of the published document.

Note: When you save a PDF file, the file name consists of the following: [Meeting Name]_[Meeting ID]_[Document Type]_[Meeting Date]_[Meeting Time].pdf.

If you select the link of the document name, the document displays with links to the meeting items.



Note: If an item is marked as a **closed session** in Agenda, it does not display on the document screen or in the PDF link for the document.

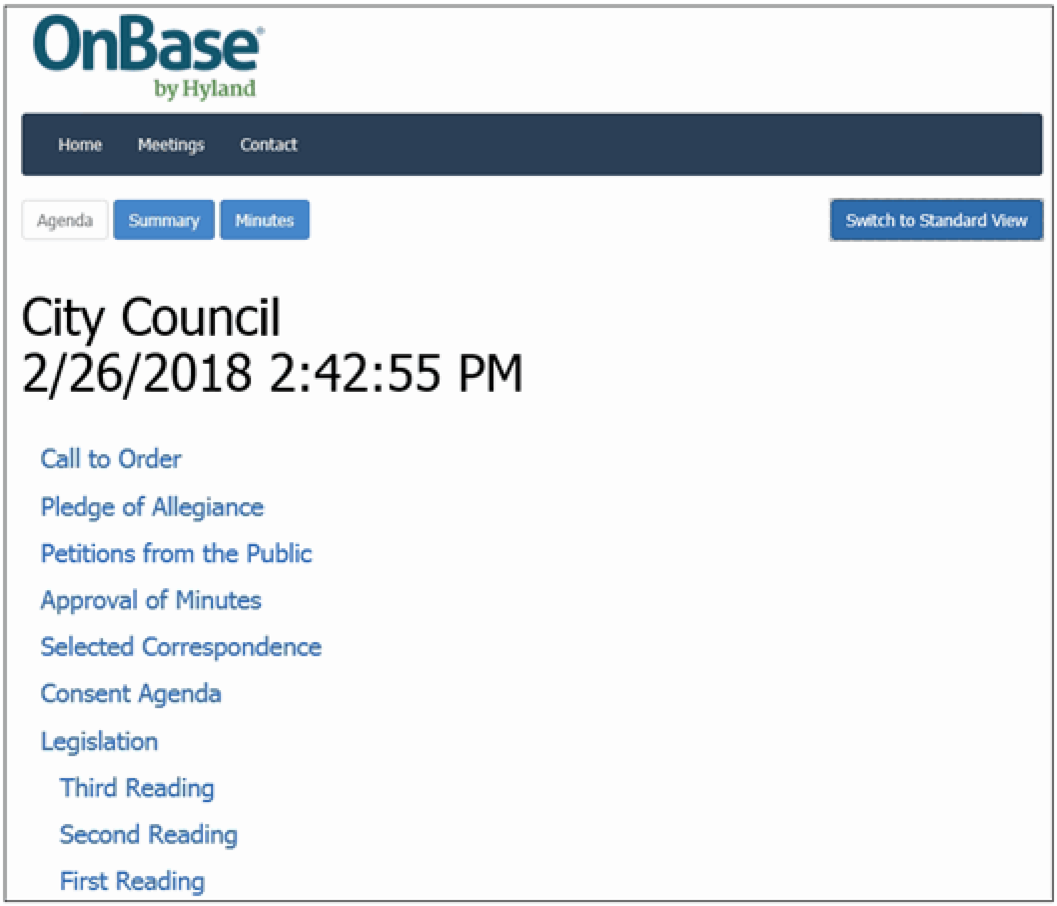
The following options are available on the Document screen:

- If more than one meeting document is available, buttons in the upper-left corner of the screen allow you to select the document you want to view.

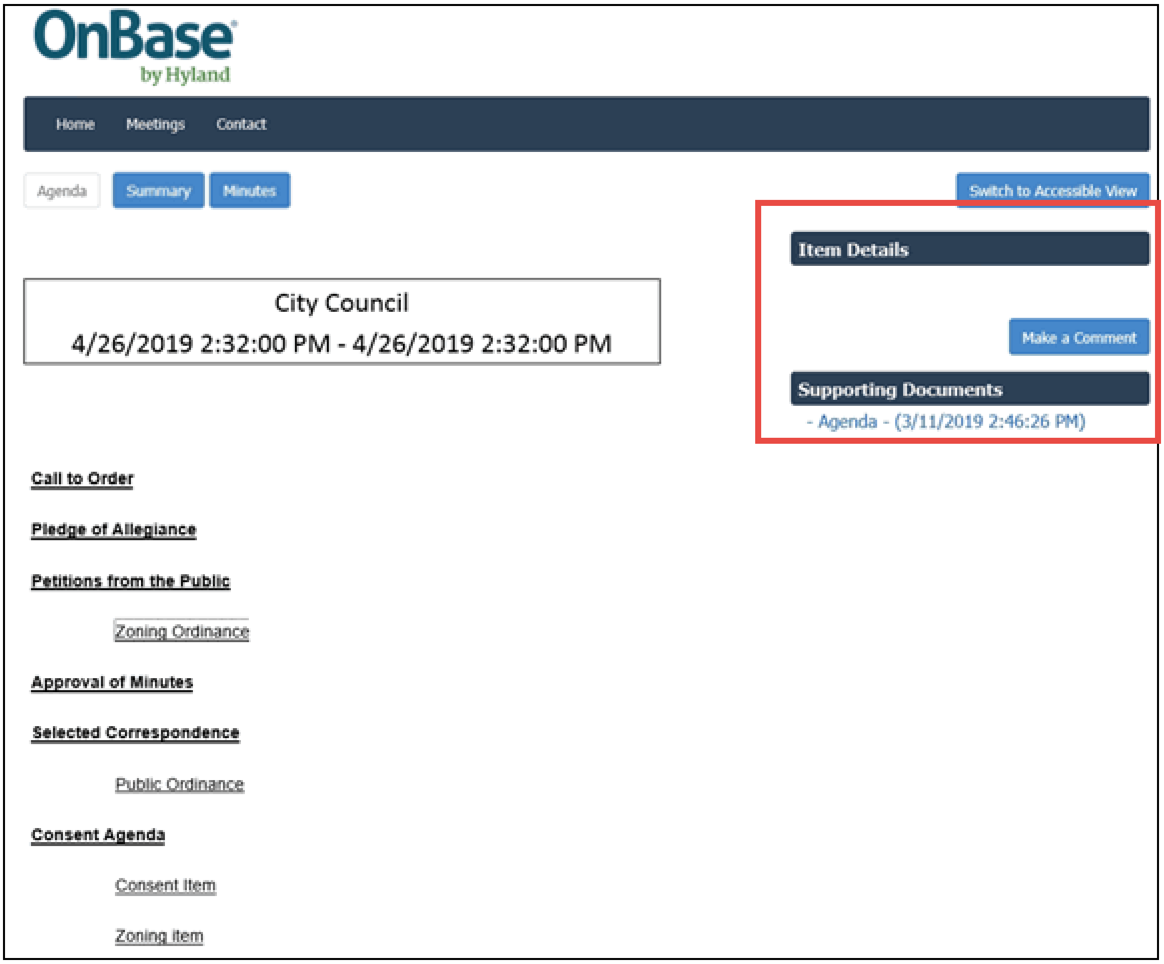
  The button for the document you are viewing is deactivated, allowing you to select other documents to view (if other documents are available).

- If you are using a document reader and need the document to be accessible to allow the reader to read the document, select the **Switch to Accessible View** button. The document displays in plain text allowing the reader to work properly.



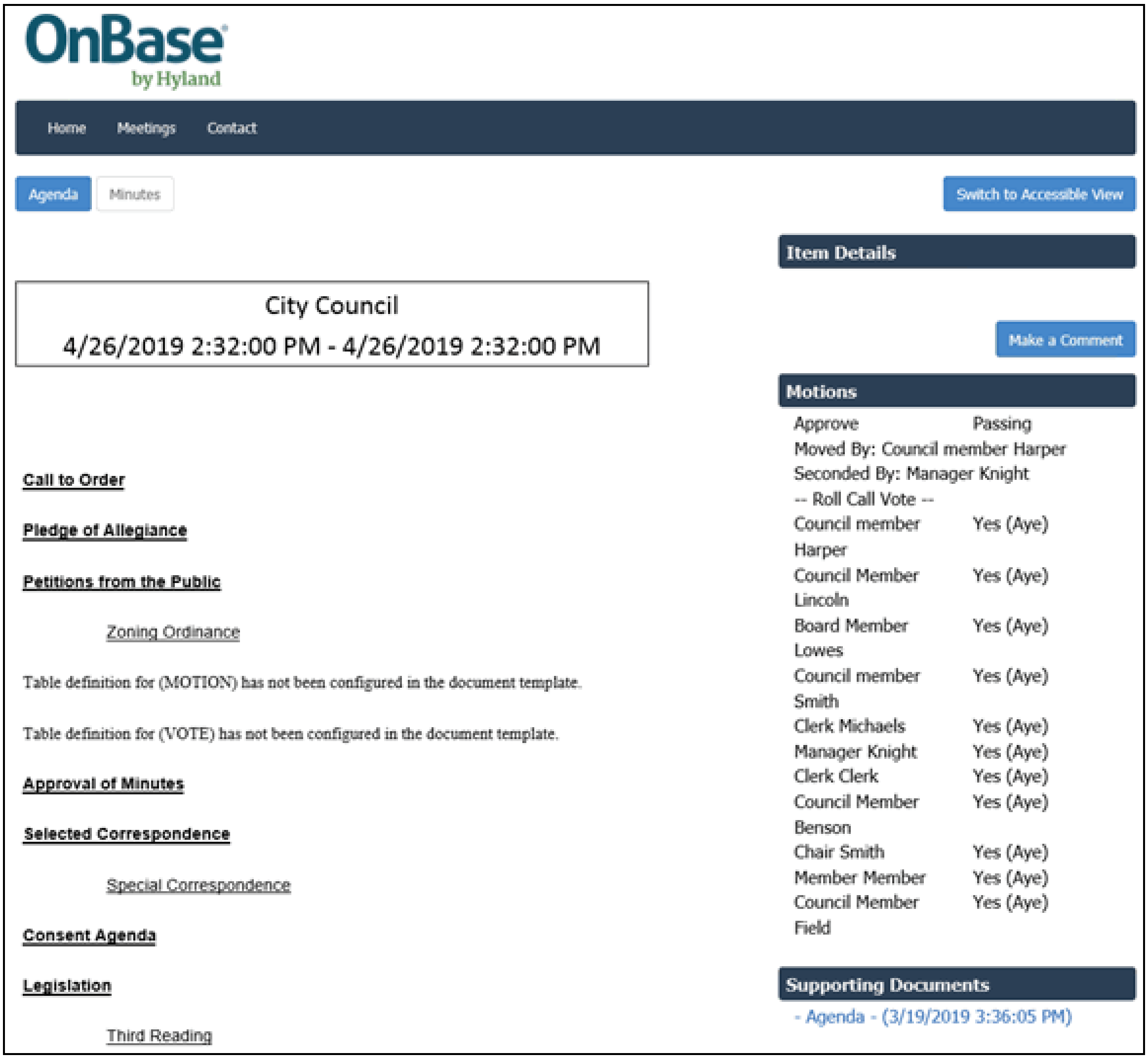
The button changes to **Switch to Standard View**, allowing you to switch back to the standard view.

- In the **Agenda** view, select any item in the document to view details for the item. If an item contains supporting documents, the documents are listed along with a link to the document.



Note: If your screen has been minimized, the Item Details section may display on the bottom of the screen.

- In the **Minutes** view, select any item in the document to view details for the item. If motions, votes, minutes, actions or notes have been recorded during the meeting, the results display both in the item tree and the item details.

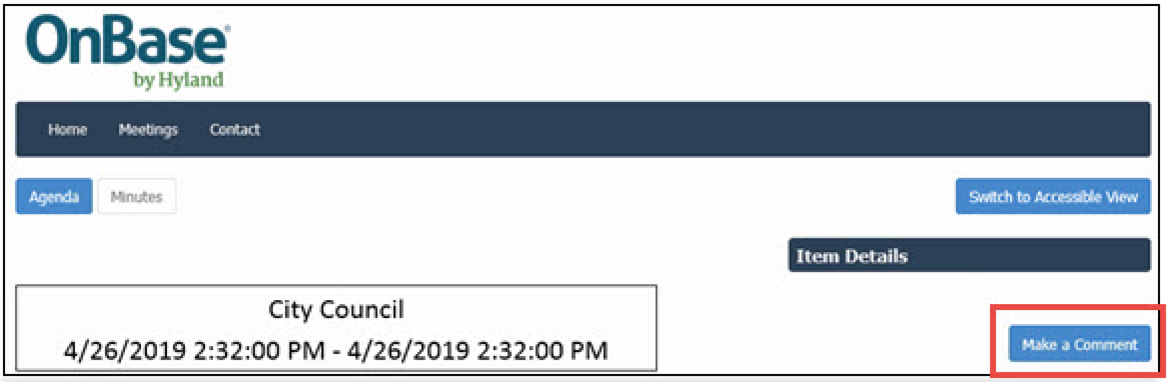


Commenting on Items

When an item in a Minutes, Agenda or Summary document is selected, an option may be displayed allowing the public to make comments on the item. This option is available only if the following criteria are met:

- The Public Comment feature has been configured.
- The meeting is set to take place in the future.

When the commenting feature is available, a button is displayed in the **Item Details** section of a selected item.



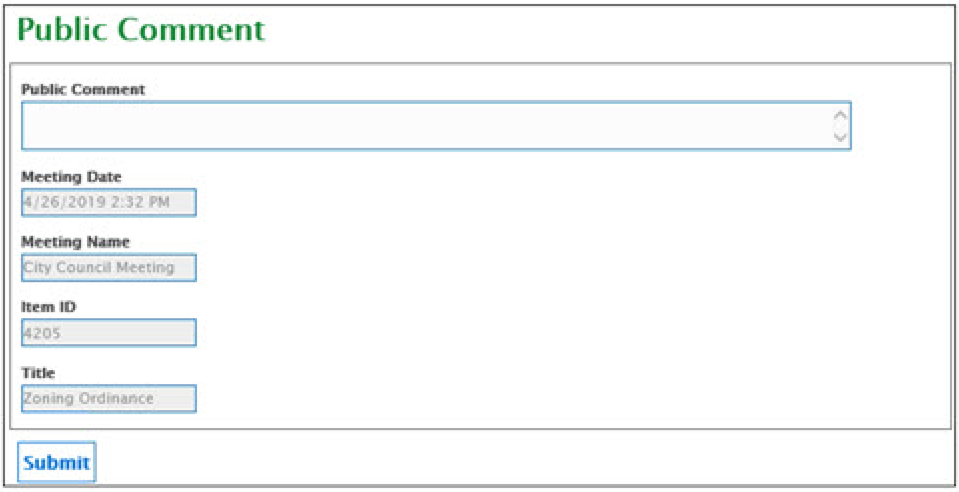
Note: Depending on how your Agenda Online has been configured, the Make a Comment button may be available prior to the meeting start time, or after the meeting has ended. See Configuring the Public Comment Button on page 143 for more information.

To comment on an item:

1. Select the agenda item from the document on which you want to make a comment.
2. From the **Item Details** section, click **Make a Comment**.

Note: If this meeting has already been held, the **Make a Comment** button is not displayed, and the comments are disabled.

The comment form configured for your instance of Agenda Online is displayed.

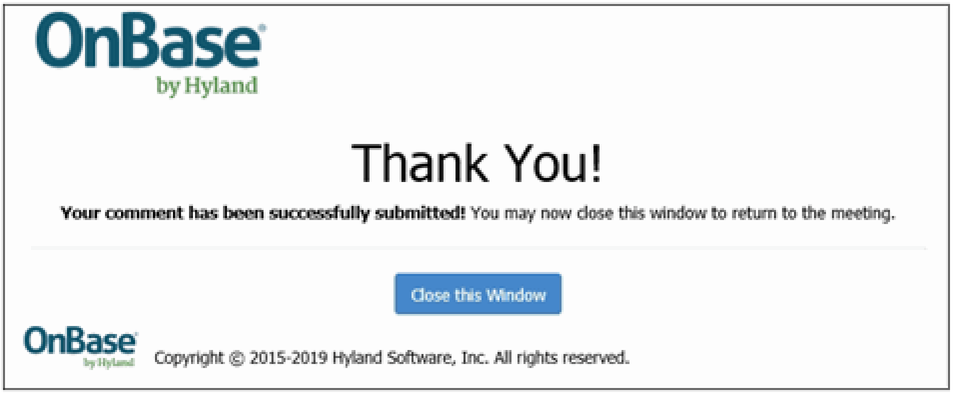


Note: The look and feel of this form may vary depending on how it was configured for your system.

3. Enter your comment in the text box available to you. In this case, the **Public Comment** box provides the ability to comment on this item. Required fields on the form include:
   - Meeting Date
   - Meeting Name
   - Item ID
   - Title

   The required fields are read-only and contain information specific to the meeting and the item selected.

4. Click **Submit**. A message is displayed indicating that your message was submitted successfully.



5. Click **Close this Window**. The window is closed and you are returned to the meeting document.

Viewing Video

If the meeting has a media file associated with it, you can view the video either live or on demand.

All video playback is through the JWPlayer. Supported JWPlayer versions include:

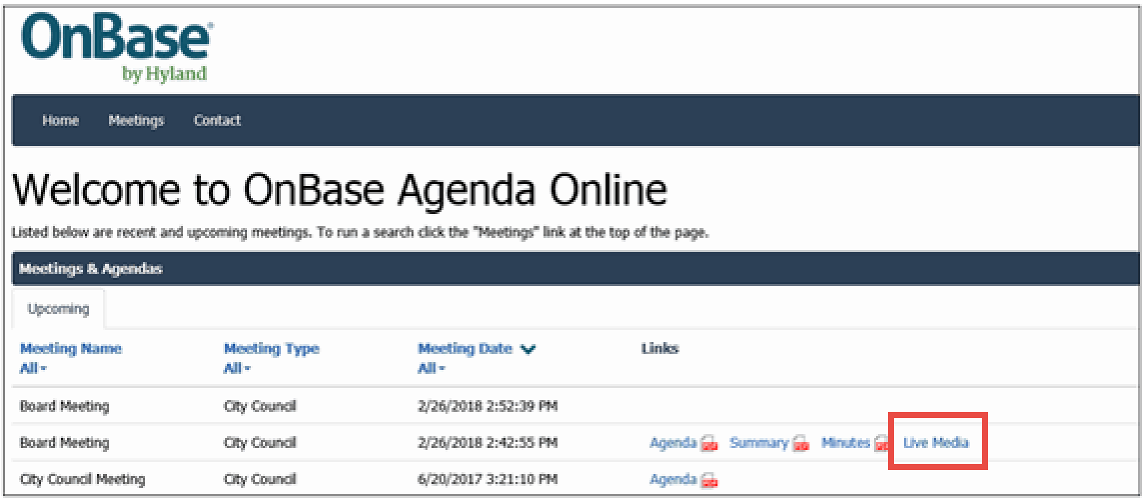
- 8.8.5
- 8.0.1
- 7.10.2
- 7.2.4

In order to view videos using JWPlayer in non-iOS and Android operating systems, you must have installed Adobe® Flash. If Flash has not been installed, a message displays indicating that you may need to install Flash before you can view the video.

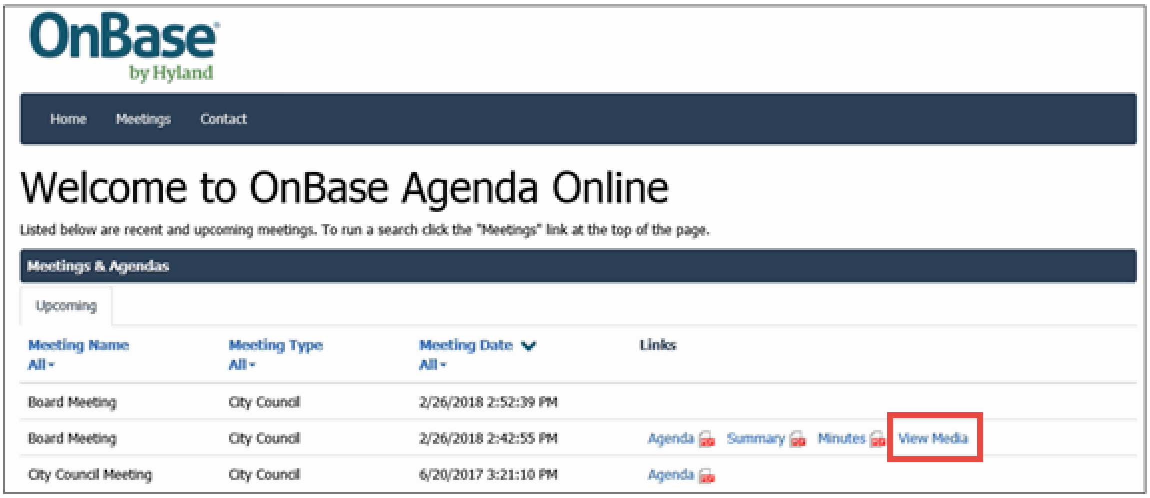
Note: The JWPlayer does not play on iPhone versions older than 8.4.

Before you can view video for a meeting, a document must be added and published to the meeting agenda. See Configuring Agenda Document Templates on page 114 for more information.

The live media stream is indicated on the main meeting screen with a **Live Media** link to the streaming media.

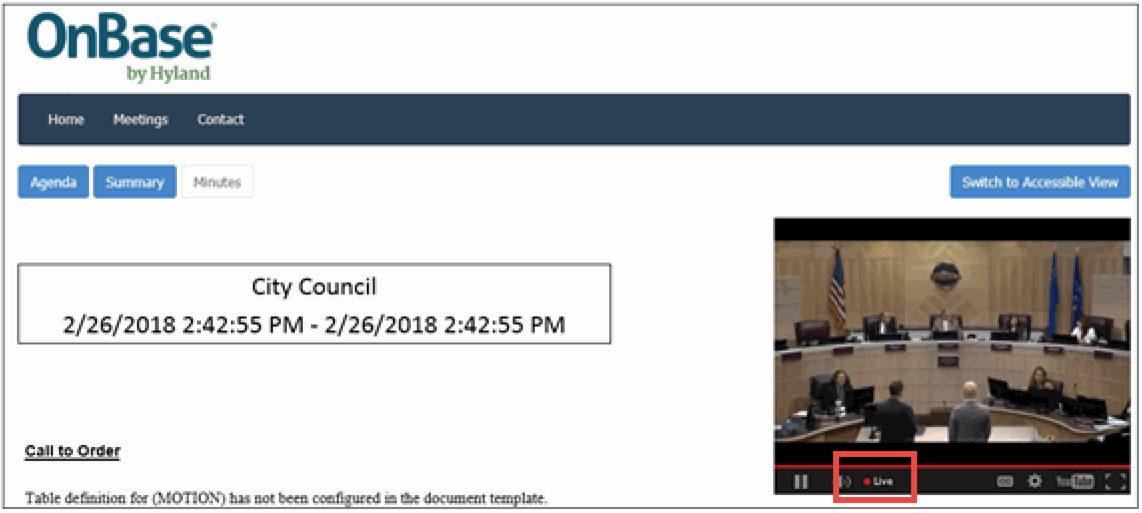


Video on demand is indicated on the main meeting screen with a **View Media** link to the recorded and published video.



When you select the link for either live video or video on demand, the document screen displays with the video playing on the screen. If the video is streaming live, you will see **Live** in the lower-left corner of the player.

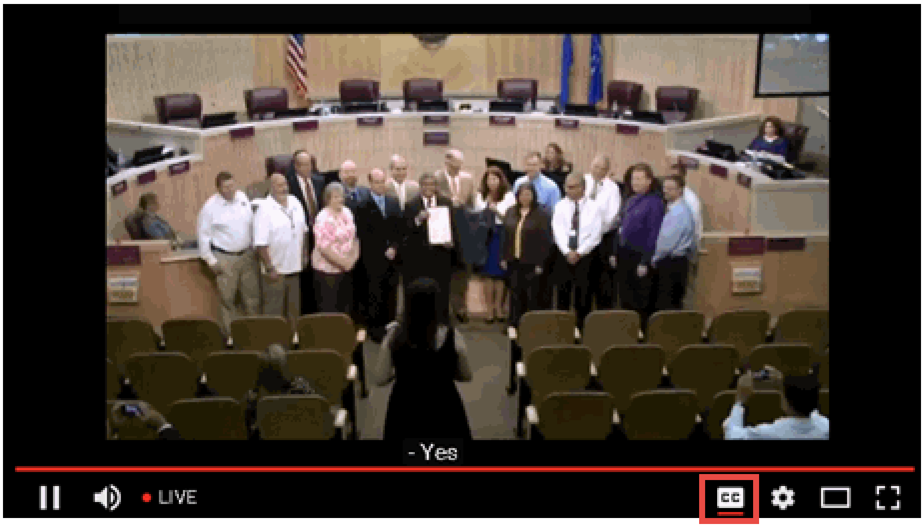
Note: The Samsung Tab S does not display **Live** on the video screen.



If the video is on-demand, no status displays in the player.

Note: If you are viewing a meeting using a mobile device, you can hide the media screen by tapping the **Hide Media** tab under the screen. You can view the media screen again by tapping the **Show Media** tab.

If Closed Captioning is enabled on the encoder, the Closed Caption button is displayed. You can toggle the captions on or off by clicking the button.



Jumping to Event Points in the Media File

Note: This is available only for video-on-demand playback.

During the course of a meeting, sections and items are activated. Upon activation, event points are added to the media file. This places a marker in the media file, allowing you to jump to the marker when you select a link for an agenda section or item in Agenda Online.

Note: If an agenda item was not activated during a meeting, an event point was not created for that item. If you click the link for the item in Agenda Online, the video either continues playing from it’s current location, or if it was stopped, it remains stopped.

Searching for Meetings and Meeting Documents

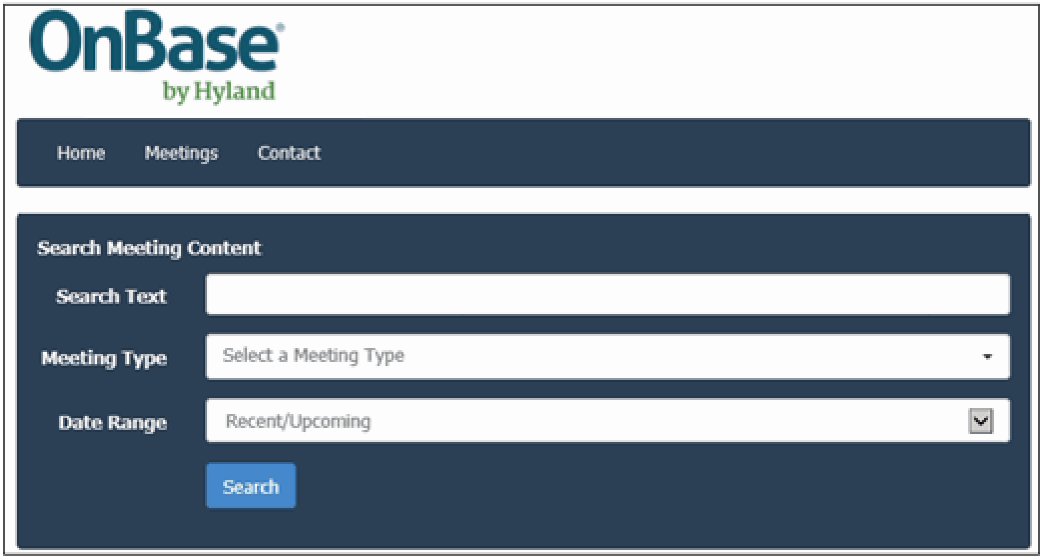
The OnBase Agenda Online portal provides the ability to search for meetings and meeting documents. You can perform a full text search to find meetings and documents that contain specific text, or you can search for meetings by a specifying a period of time in which to search for meetings.

Searching for Meetings by Date Range

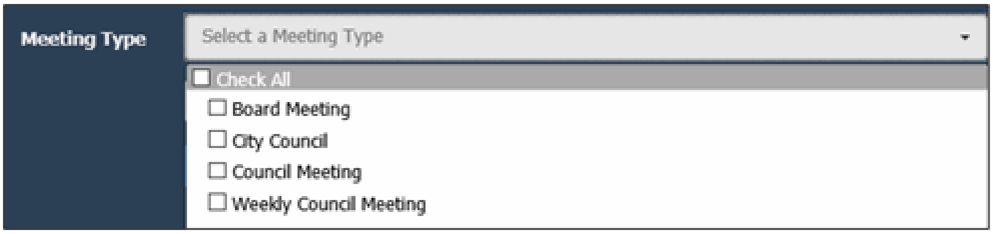
To search for meetings using a date range:

1. Click the **Meetings** link in the Navigation bar.

The Search page displays.



2. Select meeting types from the **Meeting Type** drop-down. You can select specific meeting types, or select all meeting types.



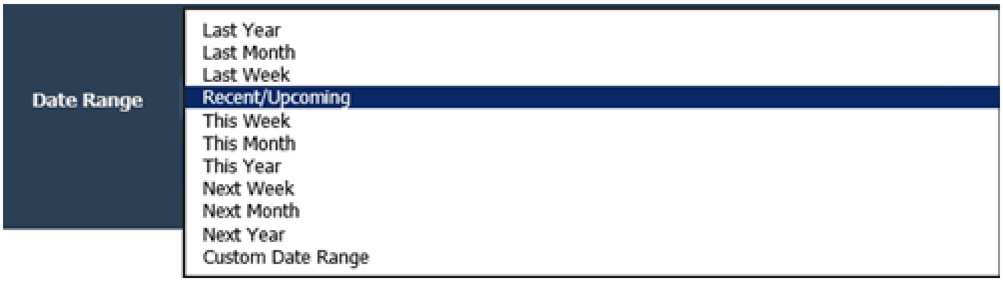
Tip: Either click anywhere off the drop-down box to close it, or select the drop-down arrow from the Meeting Type field to close the box.

Note the following:

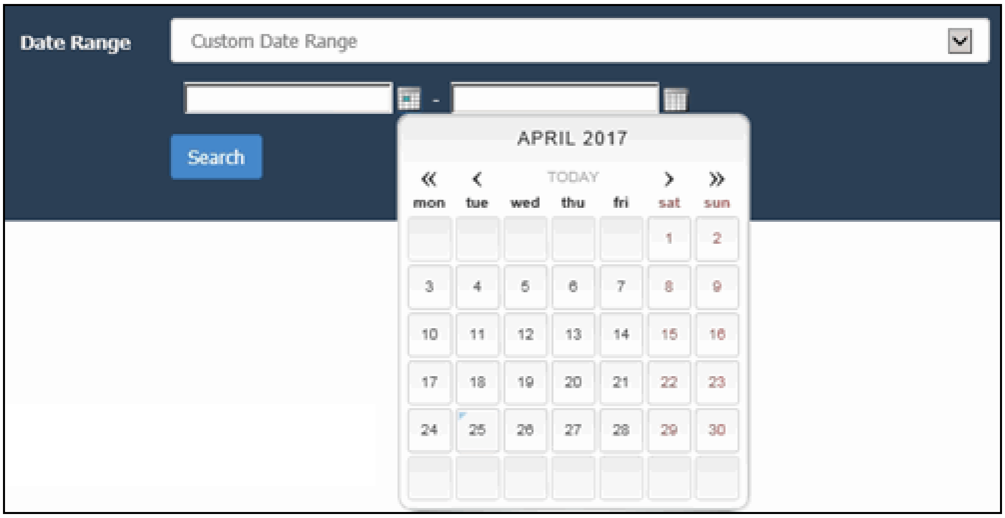
- If you select more than one meeting type, the meeting types you selected display in the **Meeting Type** field.

- If you select the Check All option to search all meeting types, the number of options available displays in the **Meeting Type** field.

3. Select a date range from the Date Range drop-down.

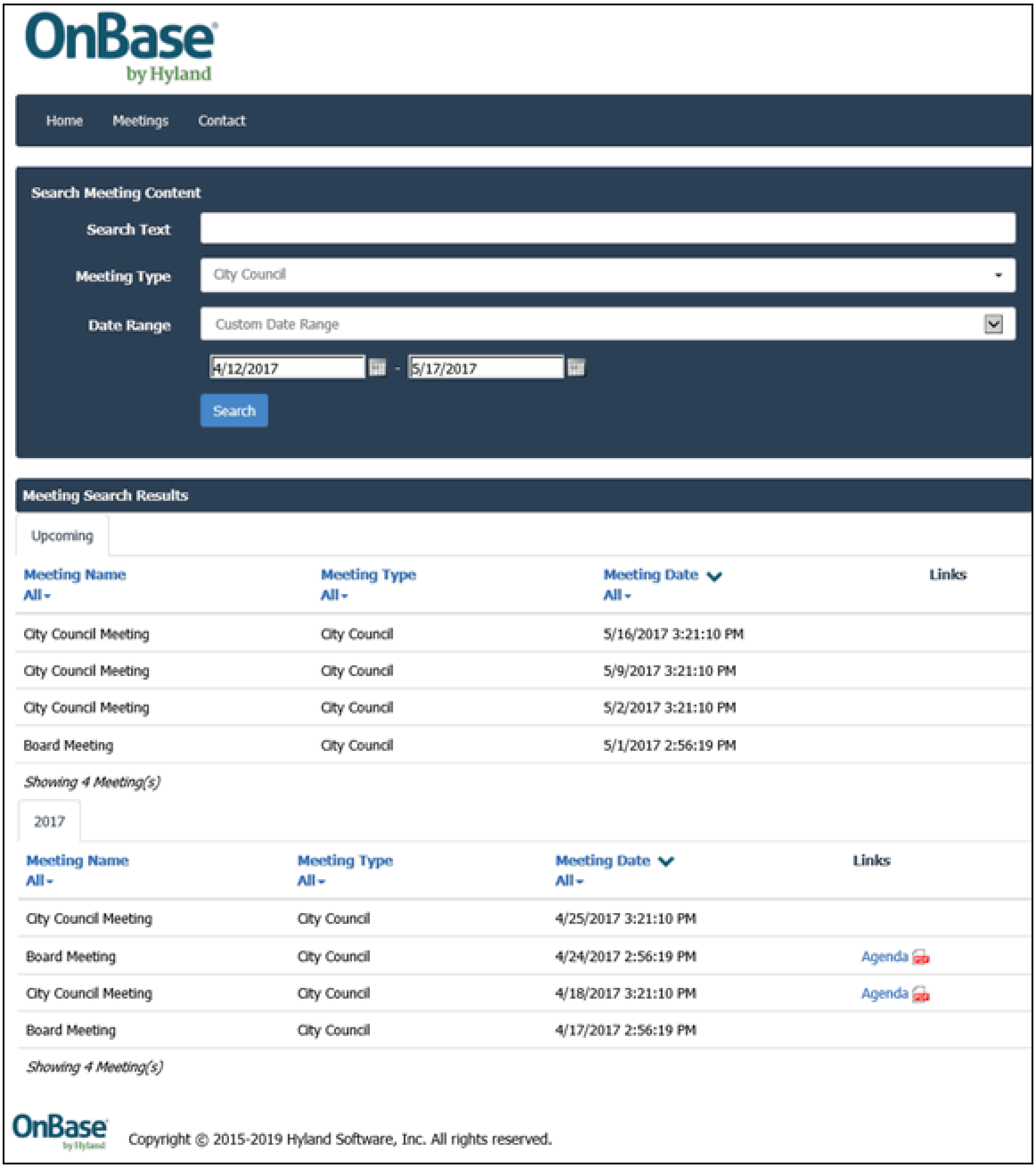


If you select **Custom Date Range**, you can either type the dates directly into the date range fields, or select the Open Calendar icons to select the date range directly from a calendar.



Note: If a month has less than 31 days, and you enter 31 as the day, the date picker automatically rolls into the next month. For example, if you enter 9/31/2015, it rolls into the next month and the date becomes 10/1/2015.

4. Click **Search**. The meetings that met your search criteria display in the lower half of the screen.



Depending on the options that have been set in the Setting Display Options on page 140, you may see any of the following in the Meeting Search Results area:

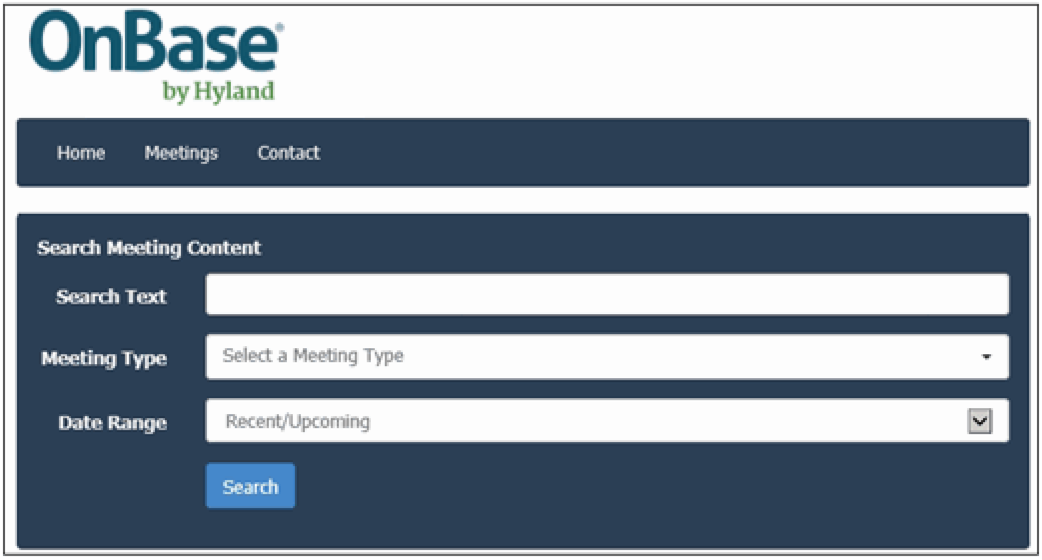
- The meeting search results may display in Upcoming or Recent tabs, or in a tab by a specific year.
- If a search limit has been set, a message displays indicating that the search limit has been reached. To view more search results, you must refine your search limit.

Searching for Meetings and Meeting Documents Using Search Text

To search for meetings and meeting documents using search text:

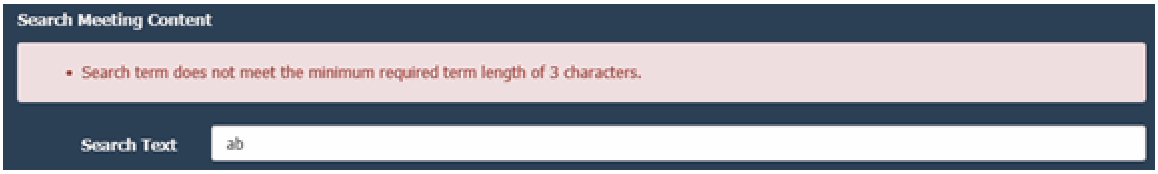
1. Click the **Meetings** link in the Navigation bar.

The Search page displays.



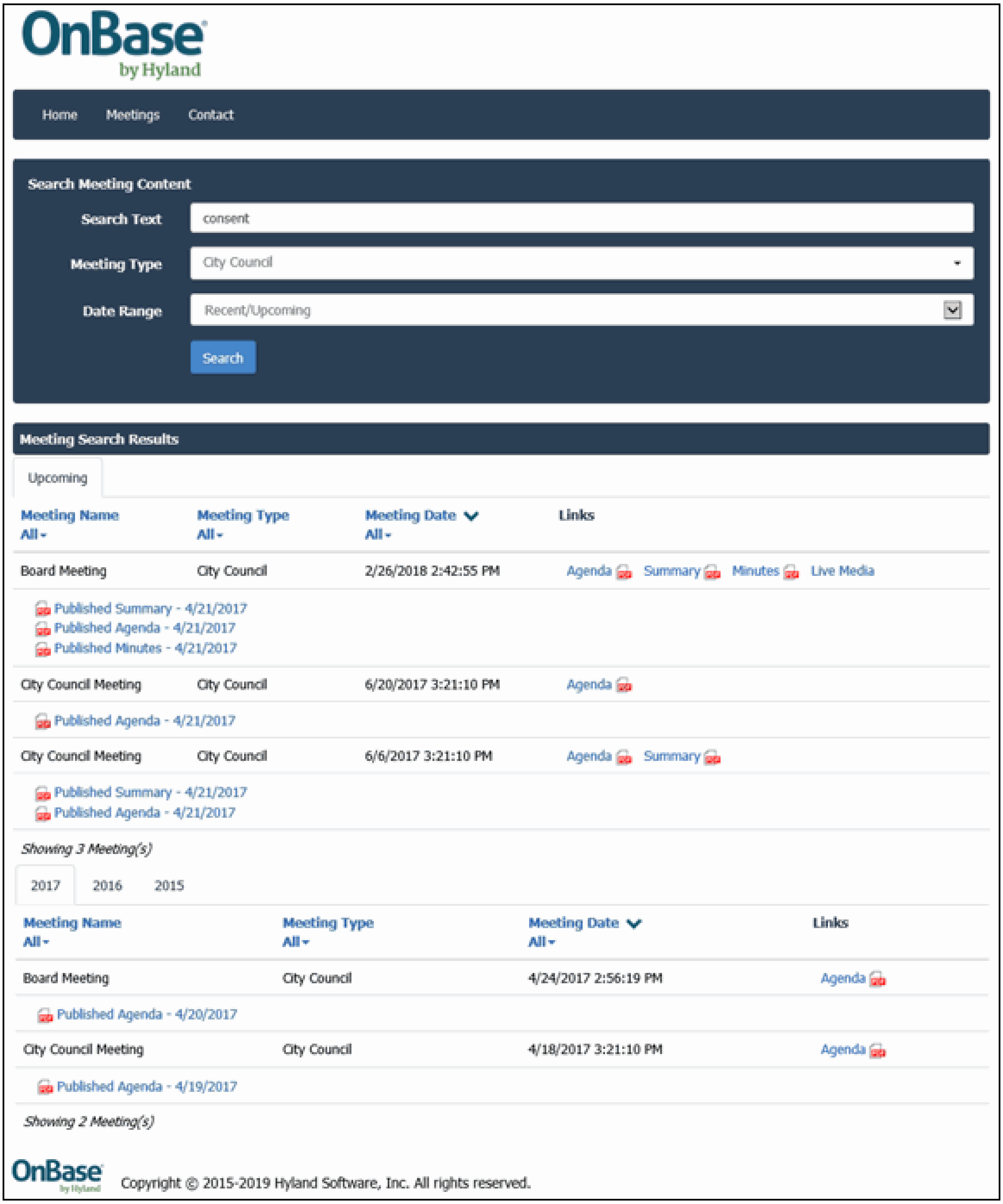
Note: The **Search Text** or **Full-Text Search** field displays only if you have a license for OnBase Full Text license. If you do not see the field, contact your system administrator for more information.

2. Type the text you want to search in the **Search Text** field. The text must contain 3 or more characters. If you enter a value that does not meet the criteria, an error message displays.



3. Select a meeting type from the **Meeting Type** field and a date range from the **Date Range** field to narrow your search.

4. Click **Search**. The meetings and/or meeting documents that meet the search criteria display in the lower half of the screen.



Note the following:

- Meeting types that match the search text criteria display with any documents listed that have been published for the meeting.

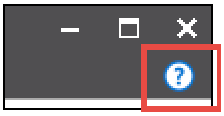
- If an agenda item meets the search text criteria, it displays under the meeting type.
- Supporting documents that meet the criteria display either under the meeting name or are indented and display under the item name for which they were added.

Using Help

Help provides the ability to locate information about items within Agenda while remaining in the application.

Do one of the following to use Help:

- From either the main Agenda screen or the Agenda Administration screen, select the Help icon in the upper-right corner.

  The Help files display, allowing you to search for the information you need.
- While working in Agenda, press **F1** to display the Help files.

Agenda Reporting Dashboard

Overview

Agenda can be used with Reporting Dashboards for OnBase. Reporting Dashboards allow you to graphically display data returned from a data provider. Agenda can be configured as one such data provider. This chapter covers how to configure data providers for use with Agenda. For more information on creating and viewing the Reporting Dashboards, refer to the **Reporting Dashboards** module reference guide or help files.

Note: The **Reporting Dashboards** database license is required, and the user group must have administrative access to the Reporting Dashboard in the OnBase Configuration tool.

Dashboards can be created and viewed from both **Agenda** and the **Unity Client**. Upon opening either module, click the **Dashboards** button from the ribbon.

The **Dashboard Viewer** tab is displayed showing any existing Dashboards.

Before you can view data in a dashboard, you must create Agenda data providers for the data you want to capture

Agenda Data Providers

You can create two data providers to capture Agenda information in a reporting dashboard. The data providers that are available include:

- Agenda Items
- Unassigned Agenda Items

Creating the Agenda Items Data Provider

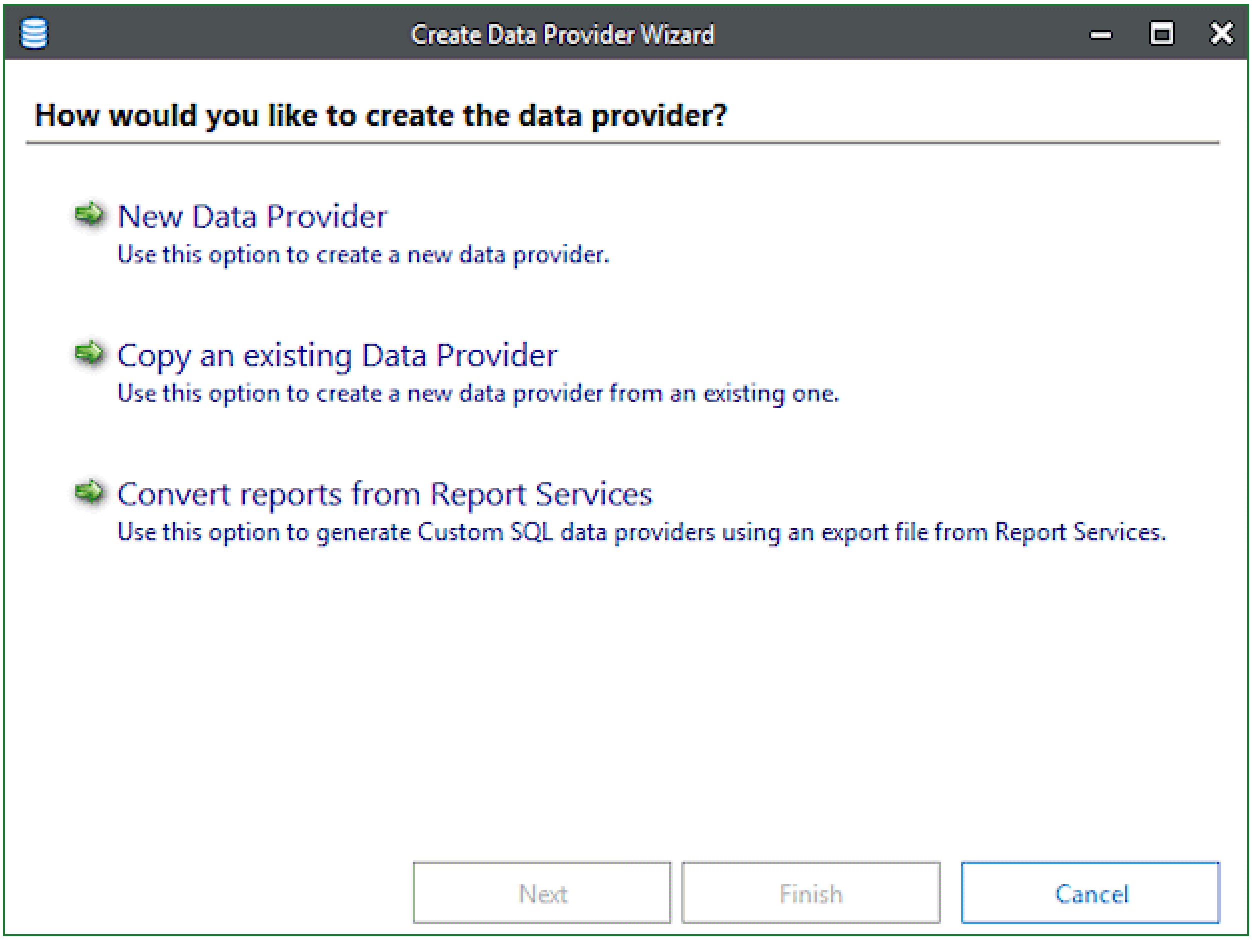
The Agenda Items Data Provider returns data on Agenda Items assigned to meetings.

The **Create Data Provider Wizard** is used to create new data providers. To create a new data provider:

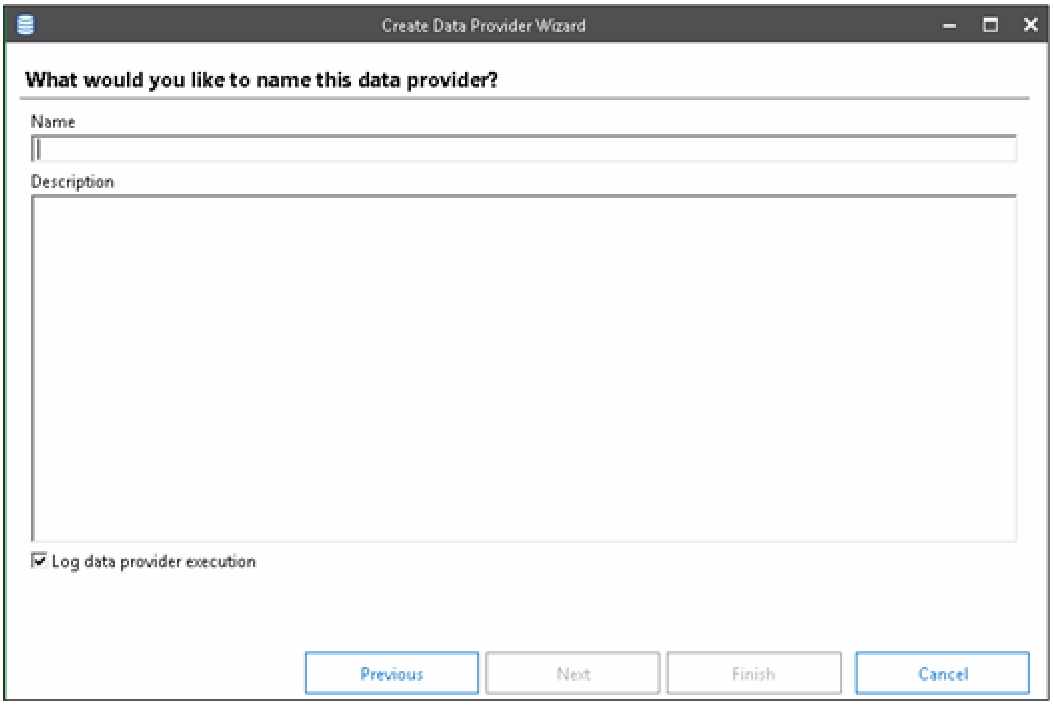
1. From the Dashboard Viewer, click **Administration** from the bottom of the Dashboard Gallery screen, and then click the **Create new Data Provider** button from the **Data Provider Administration** ribbon of the Unity Client:

2. At the **How would you like to create the data provider?** page:
   - Click **Create new Data Provider** to create a completely new data provider.
   - Click **Copy an existing Data Provider** to use an existing data provider as the template for a new data provider. The process is the same as creating a completely new data provider except the options are pre-configured with the information from the data provider that was copied. The pre-configured options can be changed or edited to reflect the requirements of the new data provider, unless otherwise noted.

- Click **Convert reports from Report Services** to use an export file from Report Services to create a custom SQL data provider.



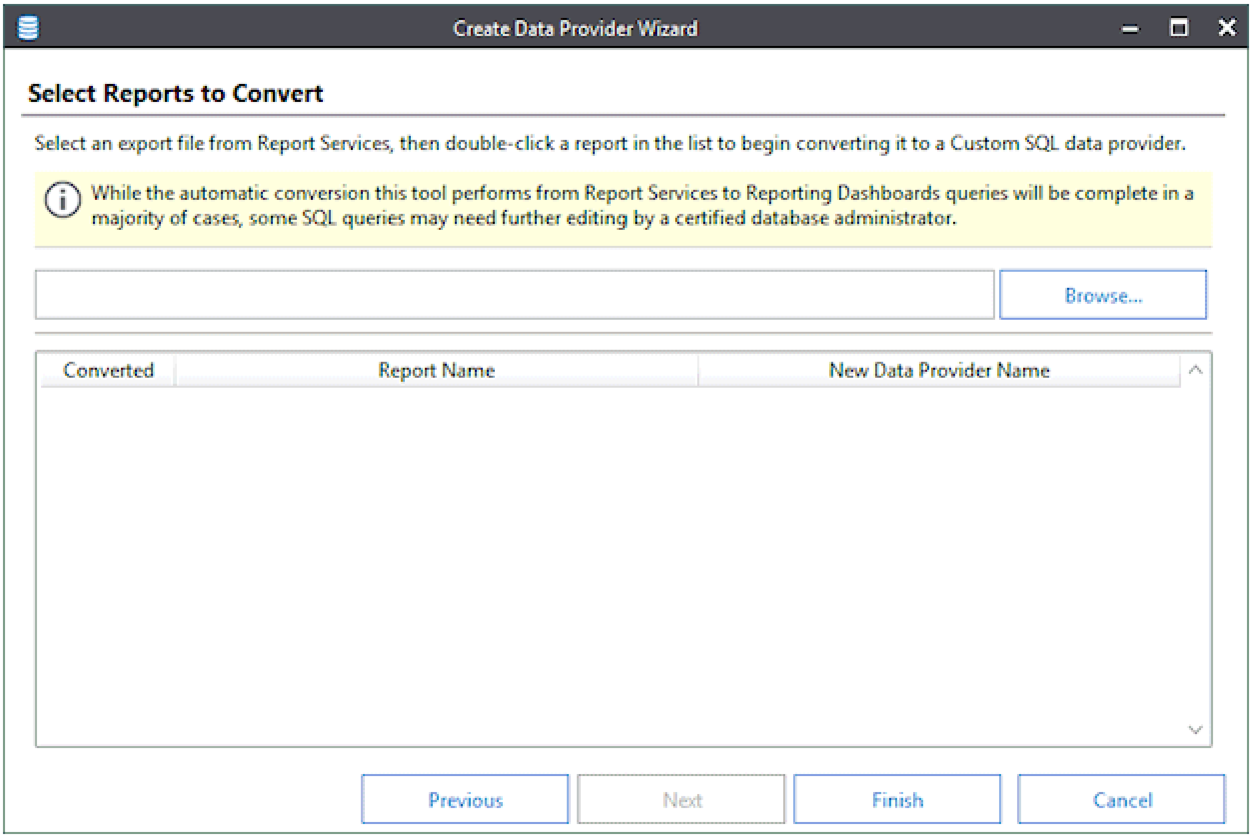
3. If you clicked **Create new Data Provider**, the **What would you like to name this data provider?** page is displayed.



If you clicked **Copy an existing Data Provider**, the **Select the data provider to copy from** page is displayed. You can search for a data provider to copy by typing the name of the data provider into the **Search** bar in this page. Select the data provider to copy, then click **Next**. The **What would you like to name this data provider?** page is displayed.

Note: When a data provider is copied, the options in the remaining pages are pre-configured with the information from the data provider that was copied. Unless otherwise noted, the pre-configured options can be changed or edited to reflect the requirements of the new data provider.

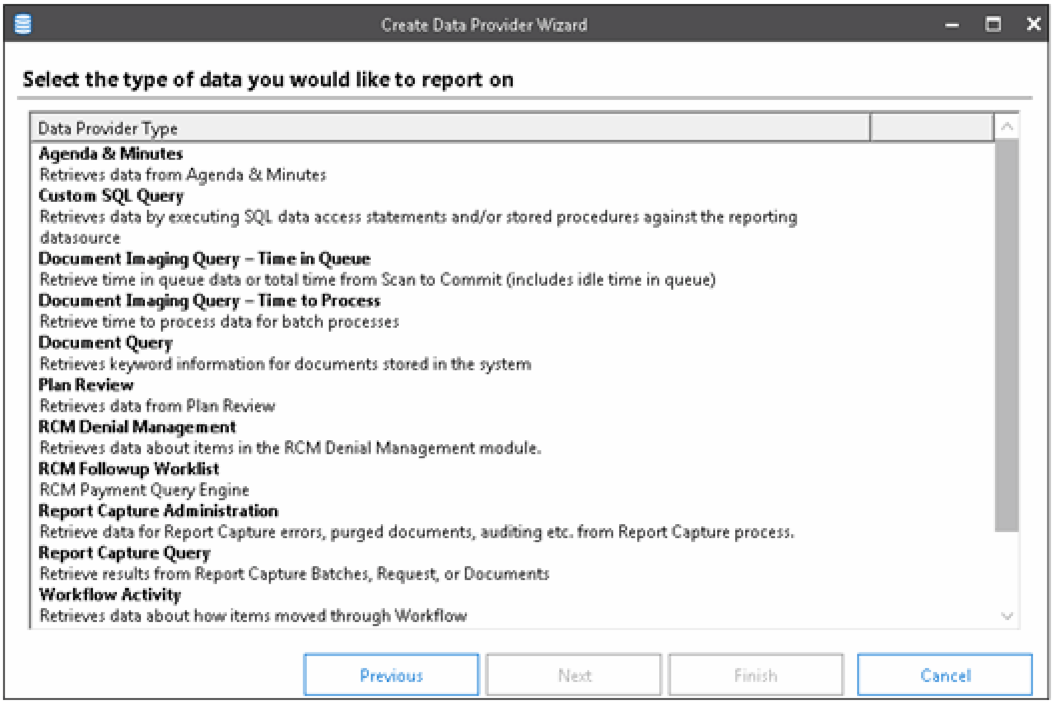
if you clicked **Convert reports from Report Services**, the **Select Reports to Convert** page is displayed. Click **Browse** to select a Report Services export file (**.xml**) to import. The file is imported as a Custom SQL data provider. Multiple Report Services export files can be added on this screen.



To edit the details of each individual import, double-click on the file in the list. The **What would you like to name this data provider?** page is displayed.

4. Type a name for the data provider in the **Name** field. The name should be unique and allow the data provider to be easily distinguished from other data providers.
5. Type a brief description of the data provider in the **Description** field. The description should briefly explain what the data provider is and what type of data a user can expect to retrieve from it.
6. Select **Log data provider execution** to include the elapsed time of data retrieval and runtime parameter information for this data provider in the **History** log. Data requests for the data provider are always logged in the history even if this option is deselected.
7. Click **Next**. Unless you are converting data from Report Services, the **Select the type of data you would like to report on** page is displayed. If you are converting data from Report Services, the **Edit SQL query** page is displayed.

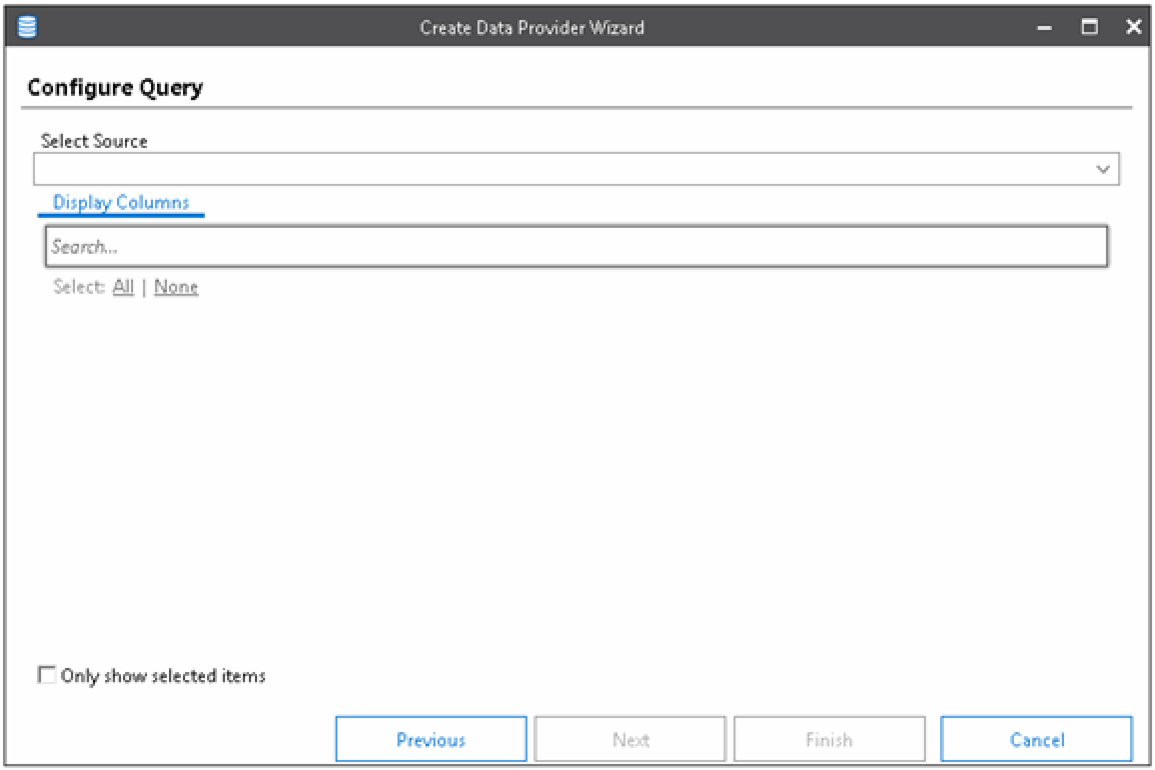
Note: If you copied an existing data provider this page is not displayed. You cannot change the data provider type for copied data providers.



Note: The data providers available depend on the modules licensed for your system. The **Custom SQL Query** and **Document Query** data provider types are available to all systems with Reporting Dashboards.

8. Select **Agenda & Minutes**.

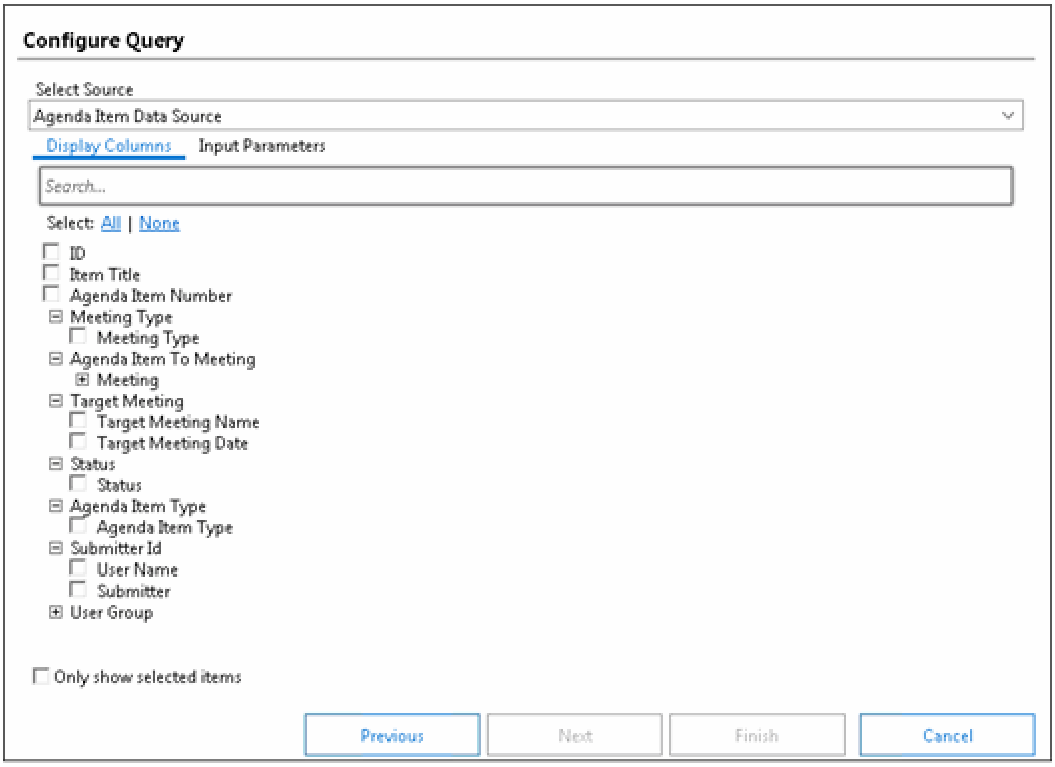
9. Click **Next**. The **Configure Query** dialog box is displayed.



10. Select the Agenda Item Data Source from the **Select Source** field.

Note: Data sources are pre-configured and cannot be modified.

The display columns and input parameters available for the Agenda Item Data Source are displayed in the Configure Query dialog box.

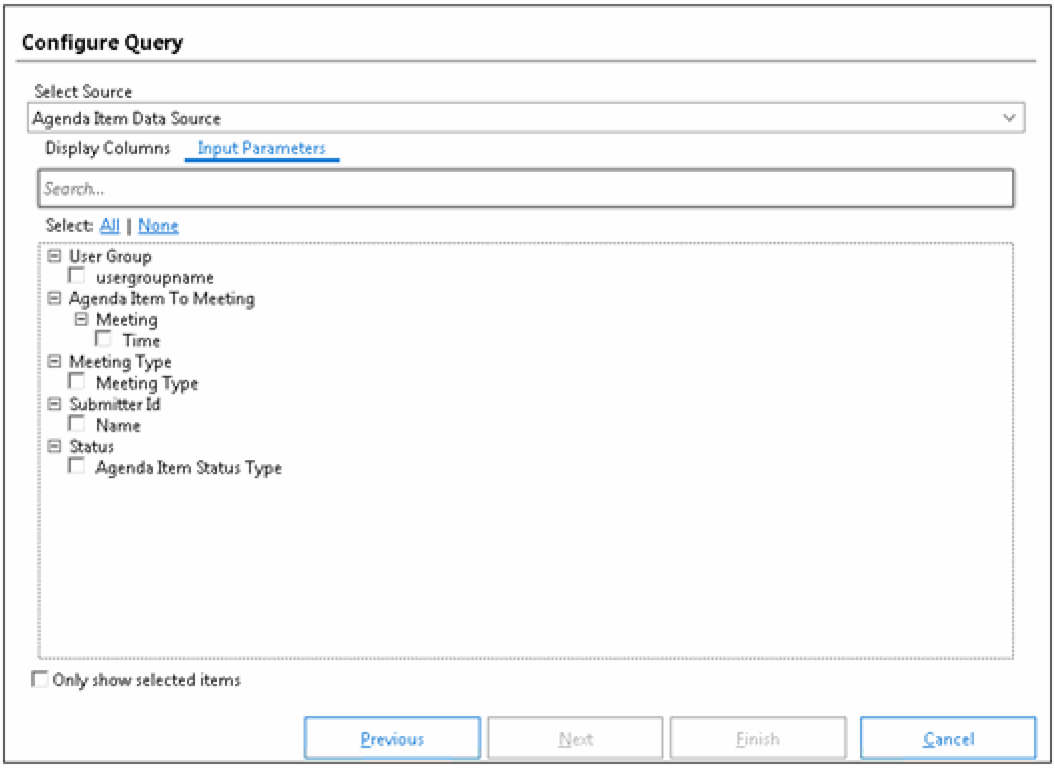


11. Select the columns you want to display on the dashboard from the **Display Columns** tab. Most of the column names are straight-forward, but the following is a list of columns that may need clarification:
    - **ID**. This is the Agenda Item ID
    - **Agenda Item Number**. This is the outline characters.
    - **Closed Session**. A 0 represents a non-closed session, whereas a 1 represents a closed session.
    - **User Name**. This is the user name of the submitter.
    - **Submitter**. This is the real name of the submitter.

    You can also select **All** to display all columns, or **None** to display no columns.

Note: You must select at least one item to display in the display columns.

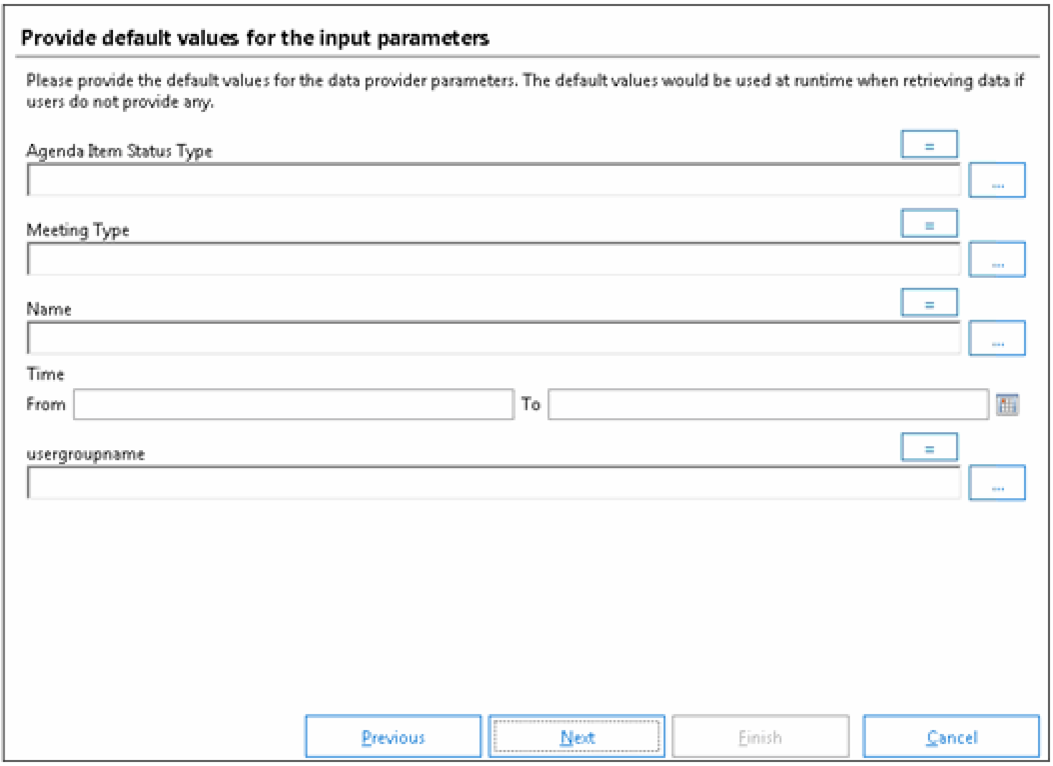
12. Select the **Input Parameters** tab. The input parameters are displayed.



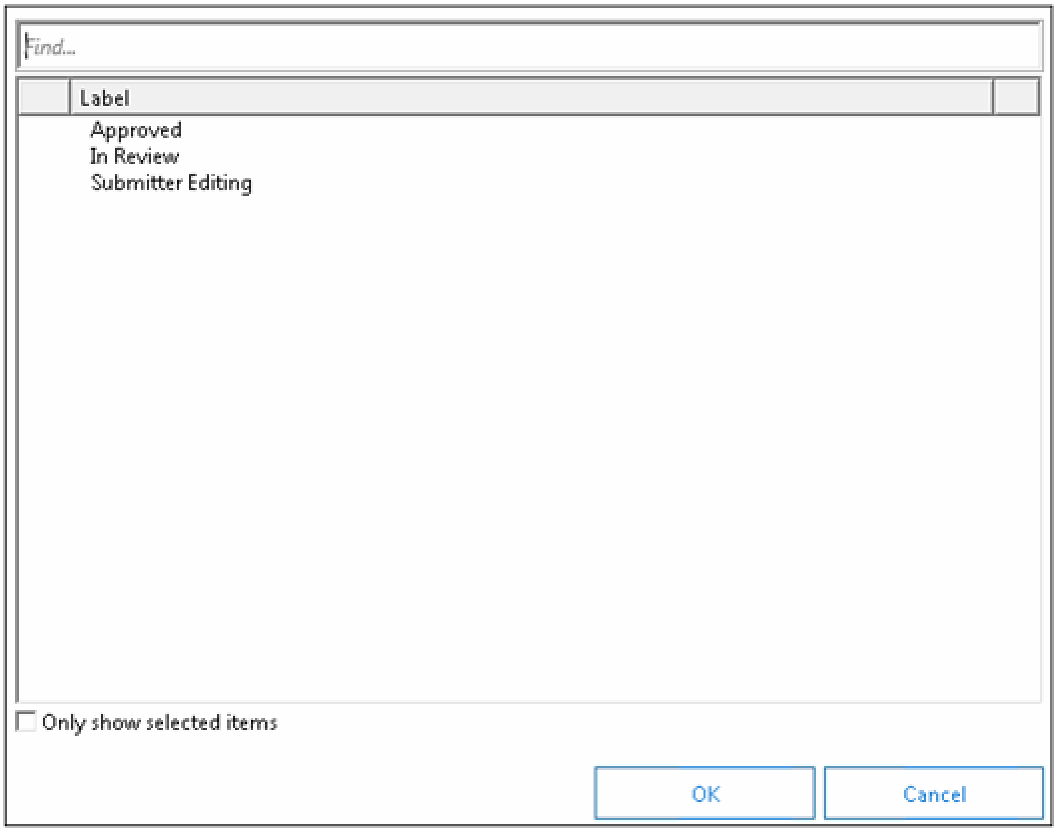
13. Select the parameters you want to allow on the dashboard from the **Input Parameters** tab. Most of the column names are straight-forward, but the following is a list of columns that may need clarification:
    - **usergroupname**. This is the submitter group name
    - **Time**. This is the time of the meeting.
    - **IsClosed Session**. A 0 represents a non-closed session, whereas a 1 represents a closed session.
    - **Name**. This is the user name of the submitter.

    You can also select **All** to display all columns, or **None** to display no columns.

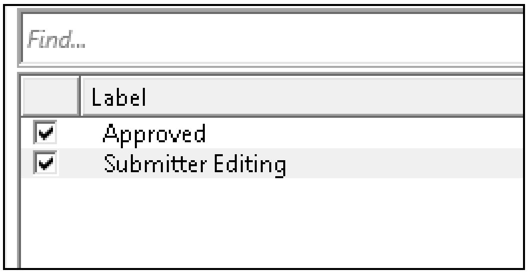
14. Click **Next**. If Input Parameters were selected, the **Provide default values for the input parameters** dialog box is displayed. If no Input Parameters were selected, continue to step 16.



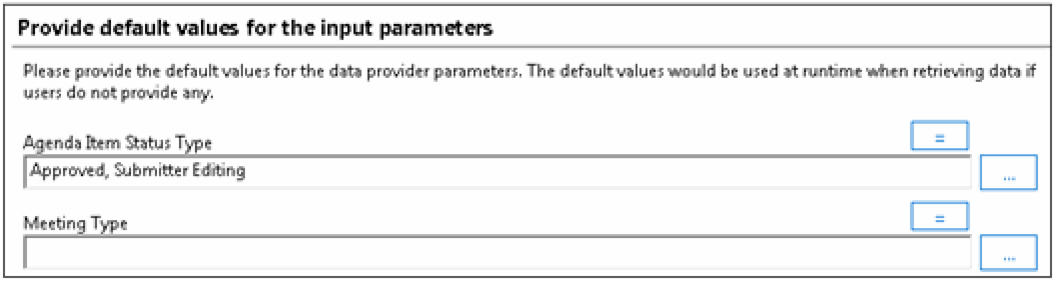
15. You can select from the values provided to filter the initial query on the dashboard. For example, if you select the ellipsis button next to each field, a dialog box is displayed listing available parameters.



Select the parameters you want, and then select the check box that is displayed to include the label(s) as a filter.



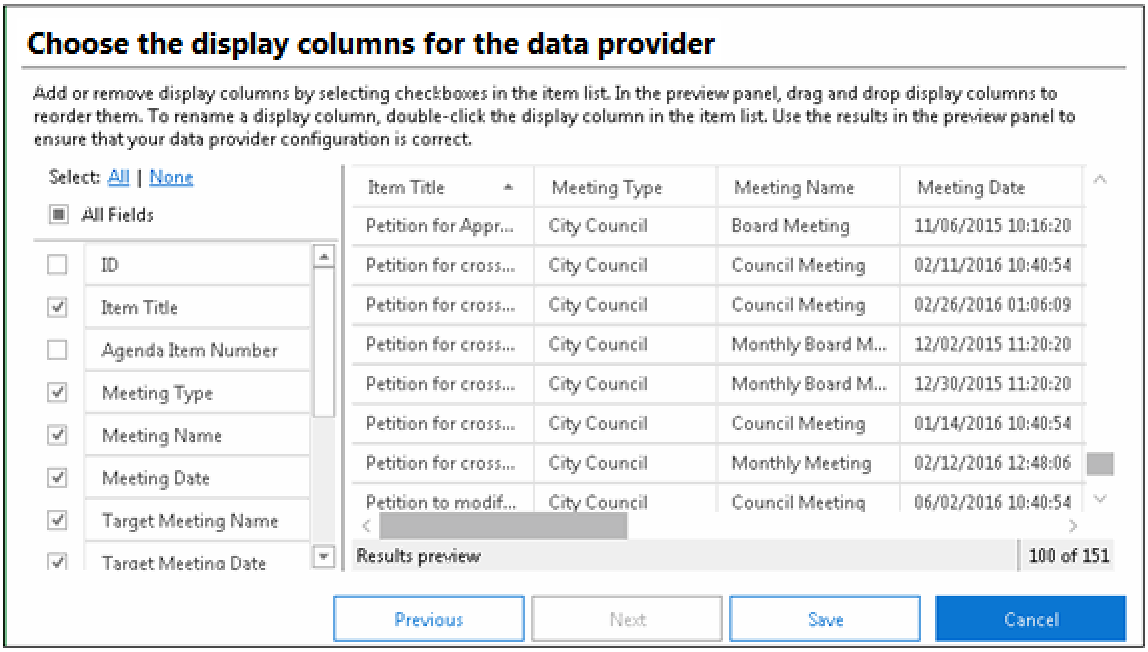
Click OK to return to the **Provide default values for the input parameters** dialog box, and to display the selected parameters.



16. Click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

Note: If the **Restrict user input to select list values** option was selected in the **Edit SQL Parameter** dialog box, you are required to select a default value for the select list prior to selecting display columns for the data provider. Select a value from the drop-down select menu and click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

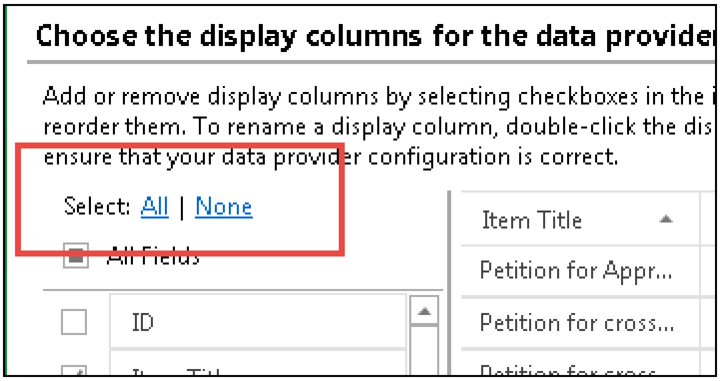
The display columns available depend on the data provider type being configured. If the data provider being configured allowed you to pre-select the display columns available, only the display columns selected earlier in the configuration process are available.



17. Select a display column to include it in the results, or deselect it to hide it.

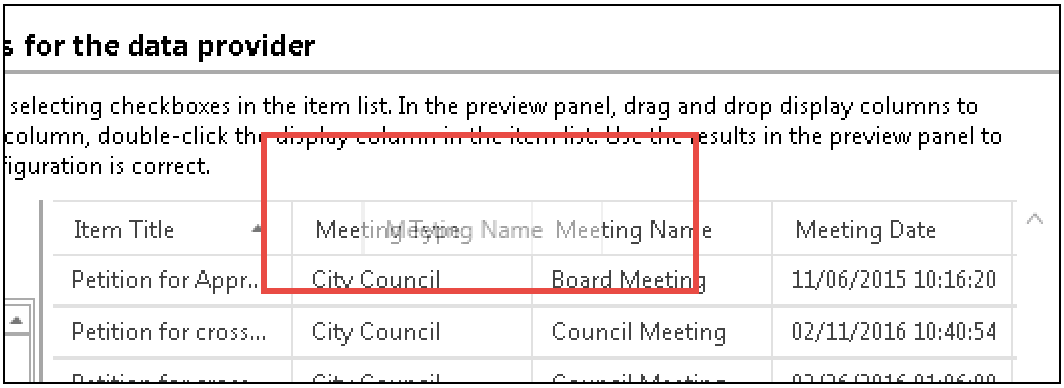
Note: In order for users to be able to open a document directly from a dashboard, the system Keyword Type **Document ID** must be included as a display column.

Click **None** to deselect all display columns or click **All** to select all display columns.



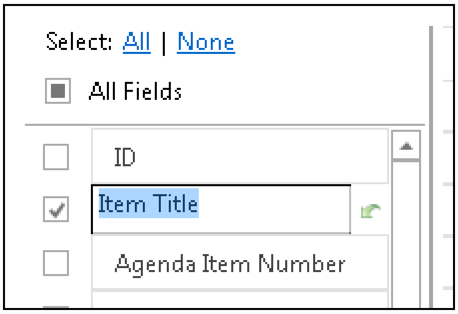
Tip: A preview of the type of data that is returned with the display columns selected is displayed in the preview pane at the right of the list of display columns. If the data returned is not acceptable, select different display columns or click **Previous** to reconfigure previous aspects of the data provider.

18. To reorder the display columns, drag-and-drop the column headings in the preview pane to put them in the desired order.

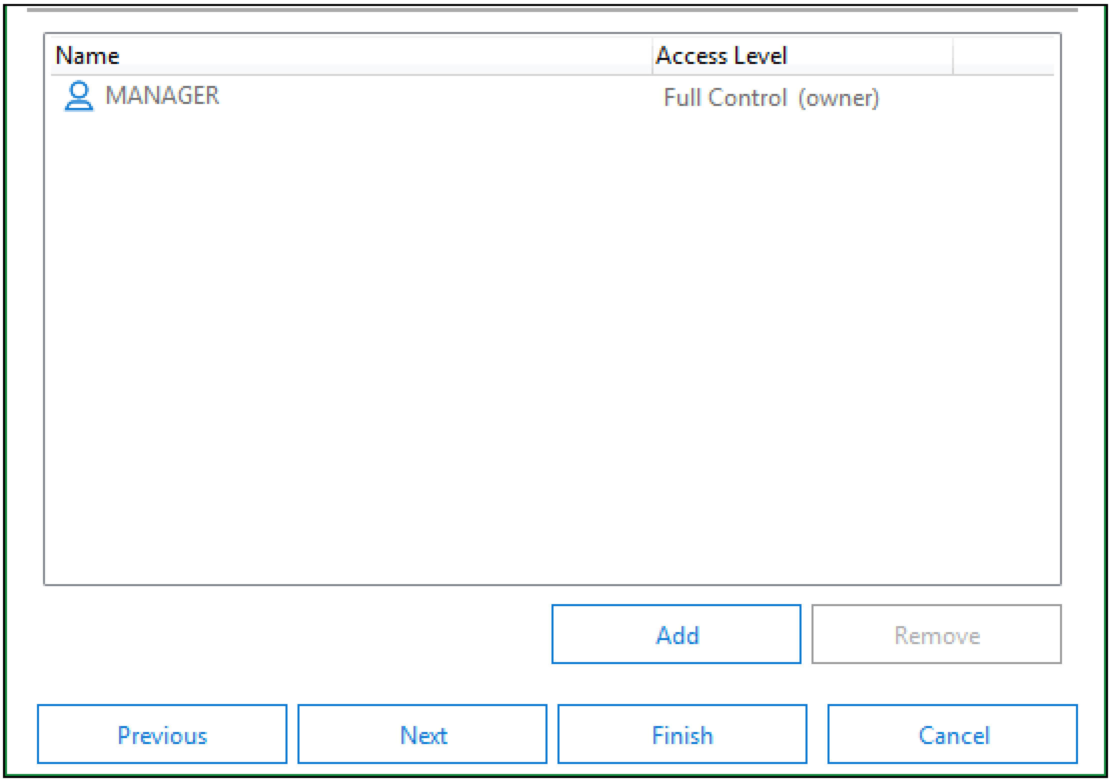


19. To rename a display column, double-click the name in the list, and type the new name in the field provided. Click anywhere outside the field to save the changes.

Note: Display column names must not be blank or end with a space.



20. Click **Next**. The **Who should have access to the data provider?** dialog box is displayed.



21. To grant access to a new user, click **Add**. The **Select Users** dialog box is displayed. Only users and users groups with access to Agenda are listed.

22. Click **Next**. The **Summary** dialog box is displayed. Review the information in the main pane to confirm that the data provider is correctly configured. If not, click **Previous** to return to the various configuration dialog boxes so that changes can be made.
23. Click **Finish**. The data provider is saved and is available for use with dashboards.

Creating the Unassigned Agenda Items Data Provider

The Unassigned Agenda Items data provider returns data on items that have been created, but have not been assigned to an agenda.

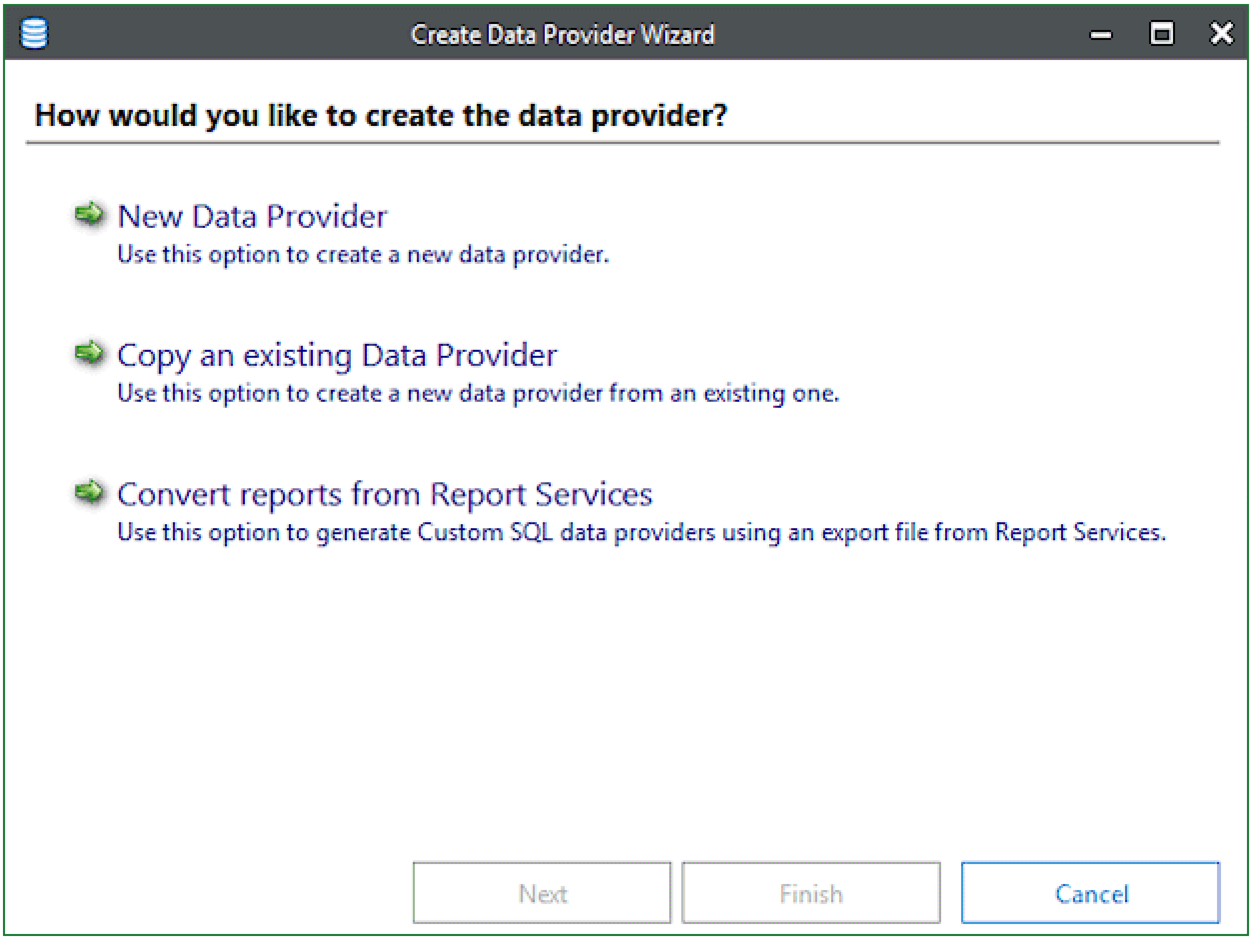
The **Create Data Provider Wizard** is used to create new data providers. To create a new data provider:

1. From the Dashboard Viewer, click **Administration** from the bottom of the Dashboard Gallery screen, and then click the **Create new Data Provider** button from the **Data Provider Administration** ribbon of the Unity Client:

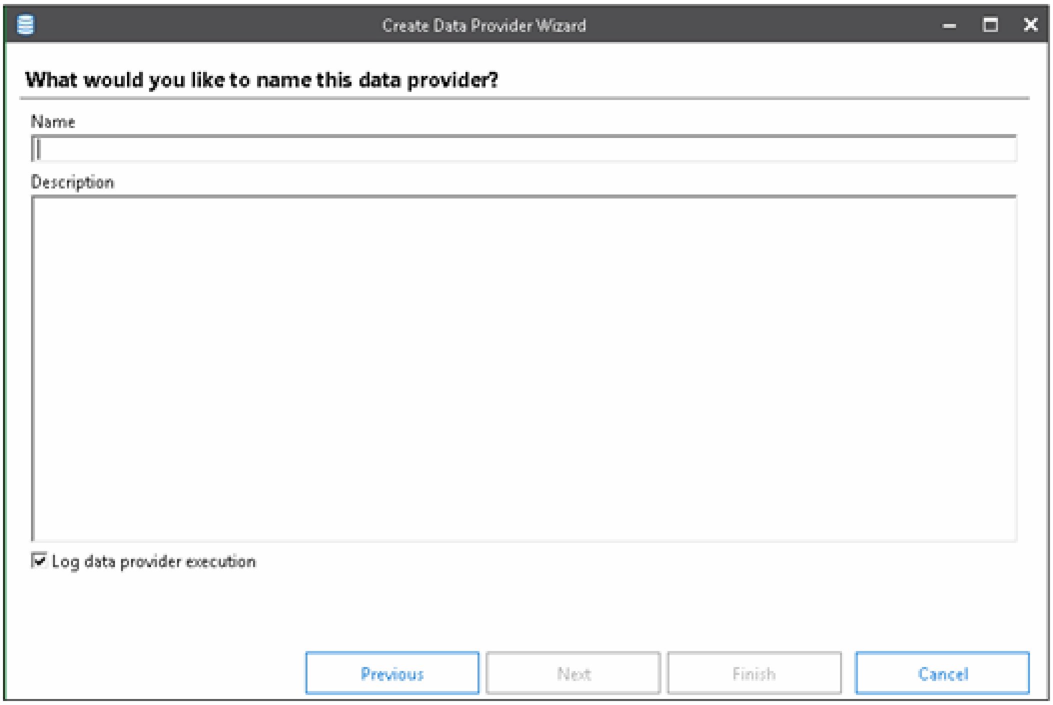
   

2. At the **How would you like to create the data provider?** page:
   - Click **Create new Data Provider** to create a completely new data provider.
   - Click **Copy an existing Data Provider** to use an existing data provider as the template for a new data provider. The process is the same as creating a completely new data provider except the options are pre-configured with the information from the data provider that was copied. The pre-configured options can be changed or edited to reflect the requirements of the new data provider, unless otherwise noted.

- Click **Convert reports from Report Services** to use an export file from Report Services to create a custom SQL data provider.



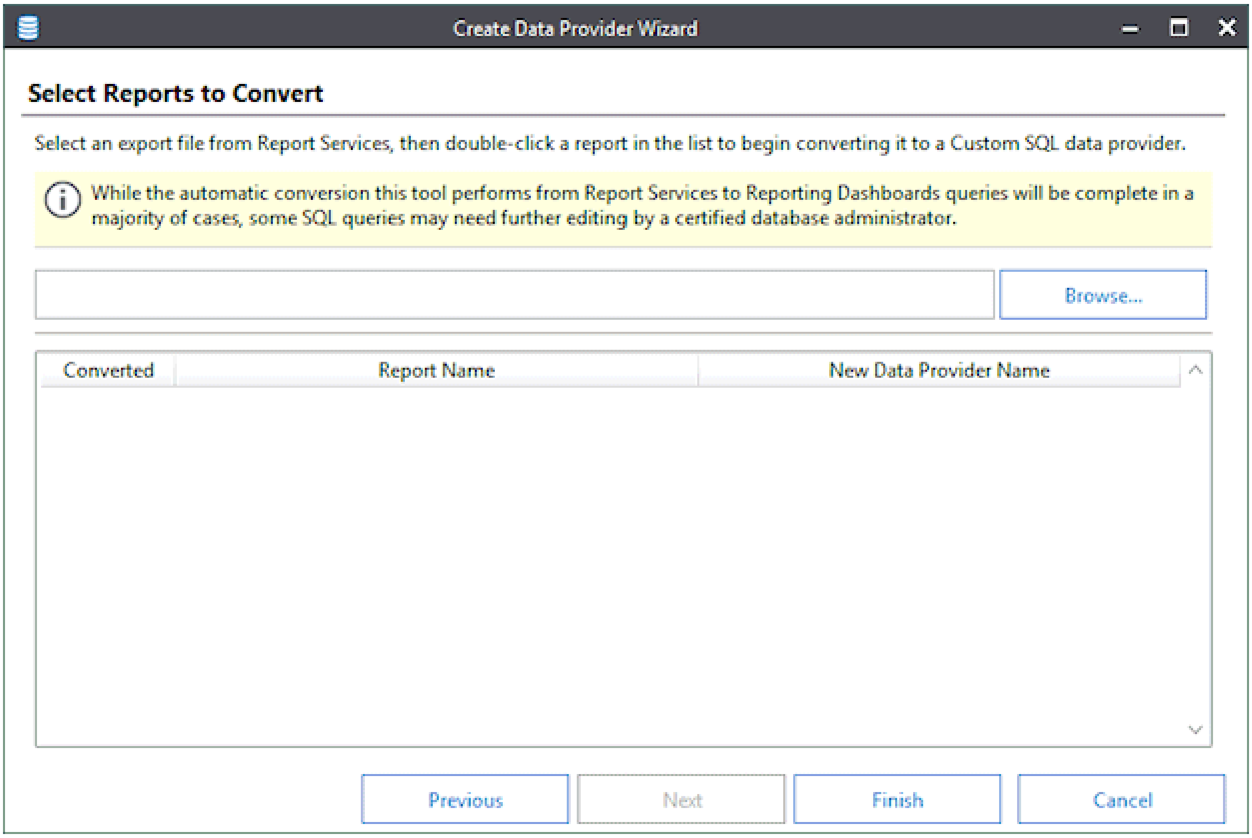
3. If you clicked **Create new Data Provider**, the **What would you like to name this data provider?** page is displayed.



If you clicked **Copy an existing Data Provider**, the **Select the data provider to copy from** page is displayed. You can search for a data provider to copy by typing the name of the data provider into the **Search** bar in this page. Select the data provider to copy, then click **Next**. The **What would you like to name this data provider?** page is displayed.

Note: When a data provider is copied, the options in the remaining pages are pre-configured with the information from the data provider that was copied. Unless otherwise noted, the pre-configured options can be changed or edited to reflect the requirements of the new data provider.

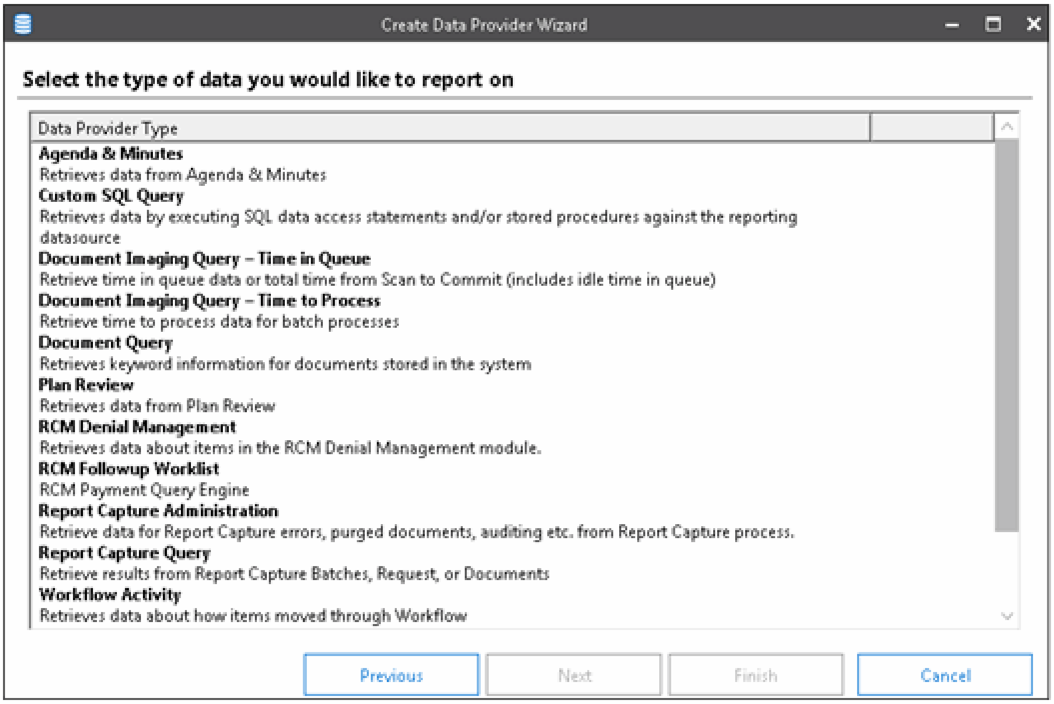
if you clicked **Convert reports from Report Services**, the **Select Reports to Convert** page is displayed. Click **Browse** to select a Report Services export file (**.xml**) to import. The file is imported as a Custom SQL data provider. Multiple Report Services export files can be added on this screen.



To edit the details of each individual import, double-click on the file in the list. The **What would you like to name this data provider?** page is displayed.

4. Type a name for the data provider in the **Name** field. The name should be unique and allow the data provider to be easily distinguished from other data providers.
5. Type a brief description of the data provider in the **Description** field. The description should briefly explain what the data provider is and what type of data a user can expect to retrieve from it.
6. Select **Log data provider execution** to include the elapsed time of data retrieval and runtime parameter information for this data provider in the **History** log. Data requests for the data provider are always logged in the history even if this option is deselected.
7. Click **Next**. Unless you are converting data from Report Services, the **Select the type of data you would like to report on** page is displayed. If you are converting data from Report Services, the **Edit SQL query** page is displayed.

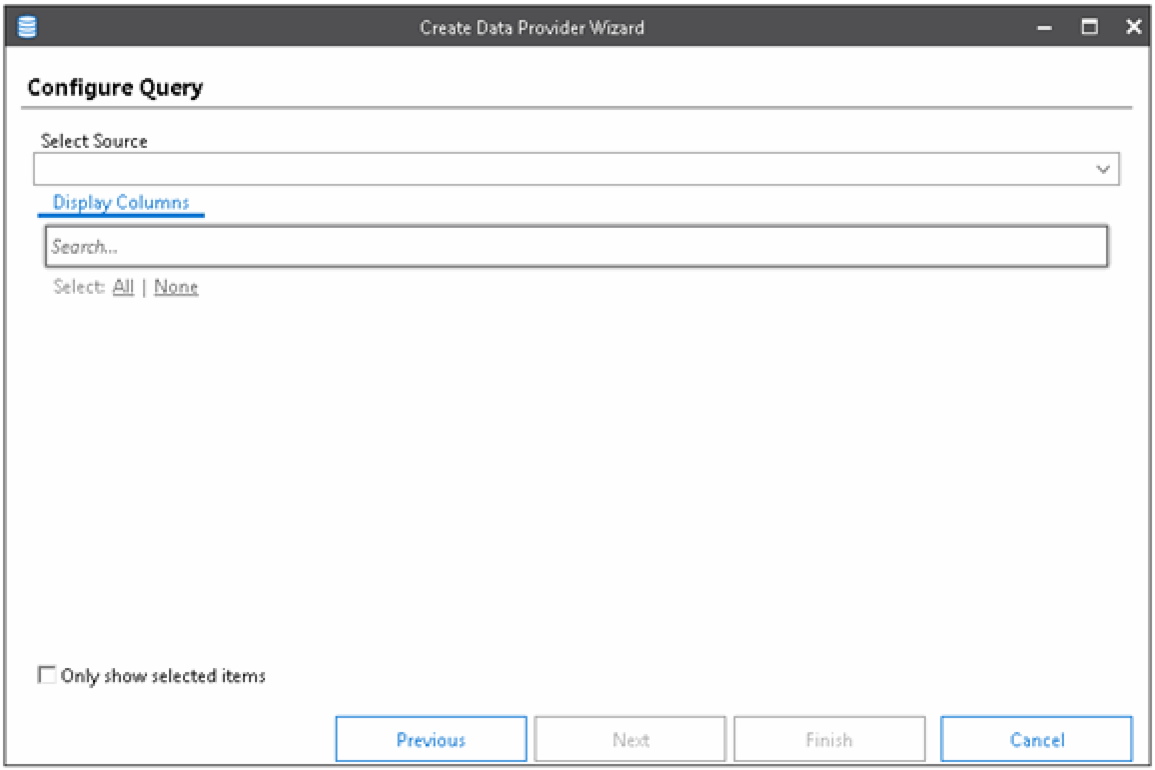
Note: If you copied an existing data provider this page is not displayed. You cannot change the data provider type for copied data providers.



Note: The data providers available depend on the modules licensed for your system. The **Custom SQL Query** and **Document Query** data provider types are available to all systems with Reporting Dashboards.

8. Select **Agenda & Minutes**.

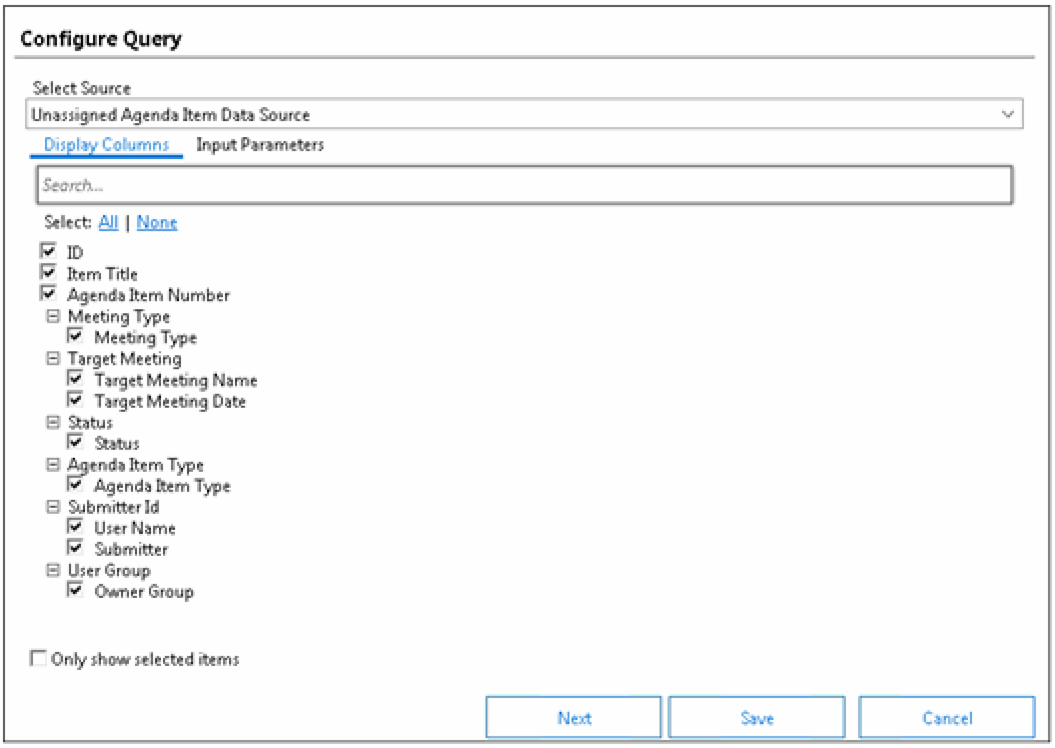
9. Click **Next**. The **Configure Query** dialog box is displayed.



10. Select the Unassigned Agenda Item Data Source from the **Select Source** field to use to perform queries.

Note: Data sources are pre-configured and cannot be modified.

The display columns and input parameters available for the Unassigned Agenda Item Data Source are displayed in the Configure Query dialog box.

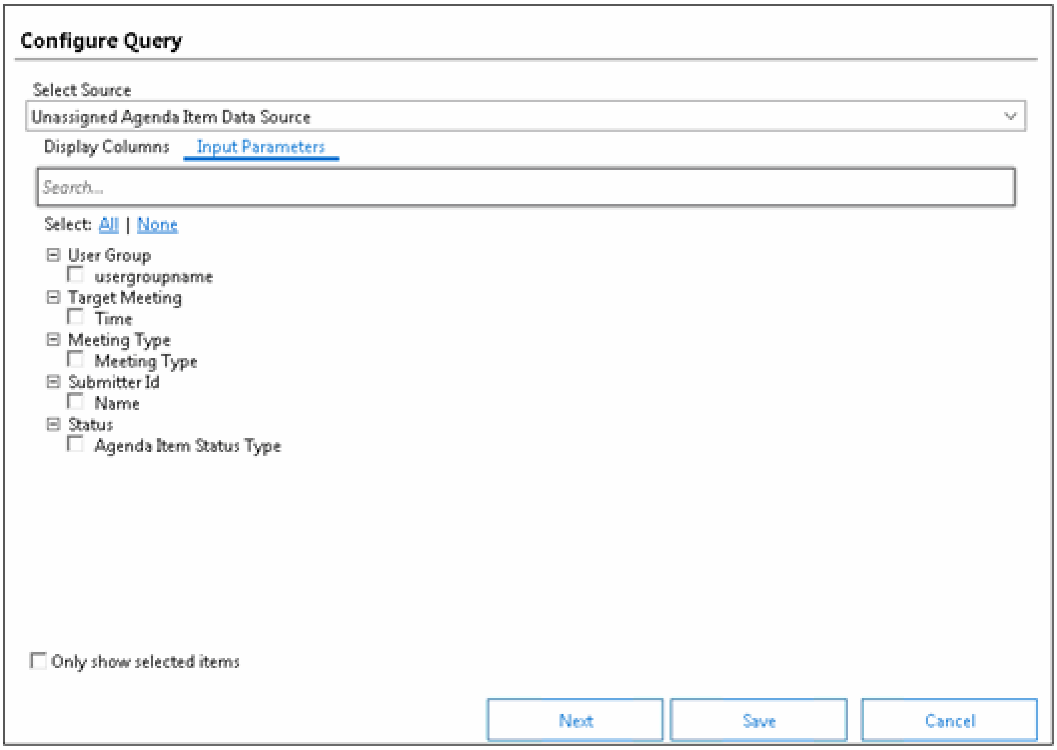


11. Select the columns you want to display on the dashboard from the **Display Columns** tab. Most of the column names are straight-forward, but the following is a list of columns that may need clarification:
    - **ID**. This is the Agenda Item ID
    - **Agenda Item Number**. This is the outline characters.
    - **Closed Session**. A 0 represents a non-closed session, whereas a 1 represents a closed session.
    - **User Name**. This is the user name of the submitter.
    - **Submitter**. This is the real name of the submitter.

    You can also select **All** to display all columns, or **None** to display no columns.

Note: You must select at least one item to display in the display columns.

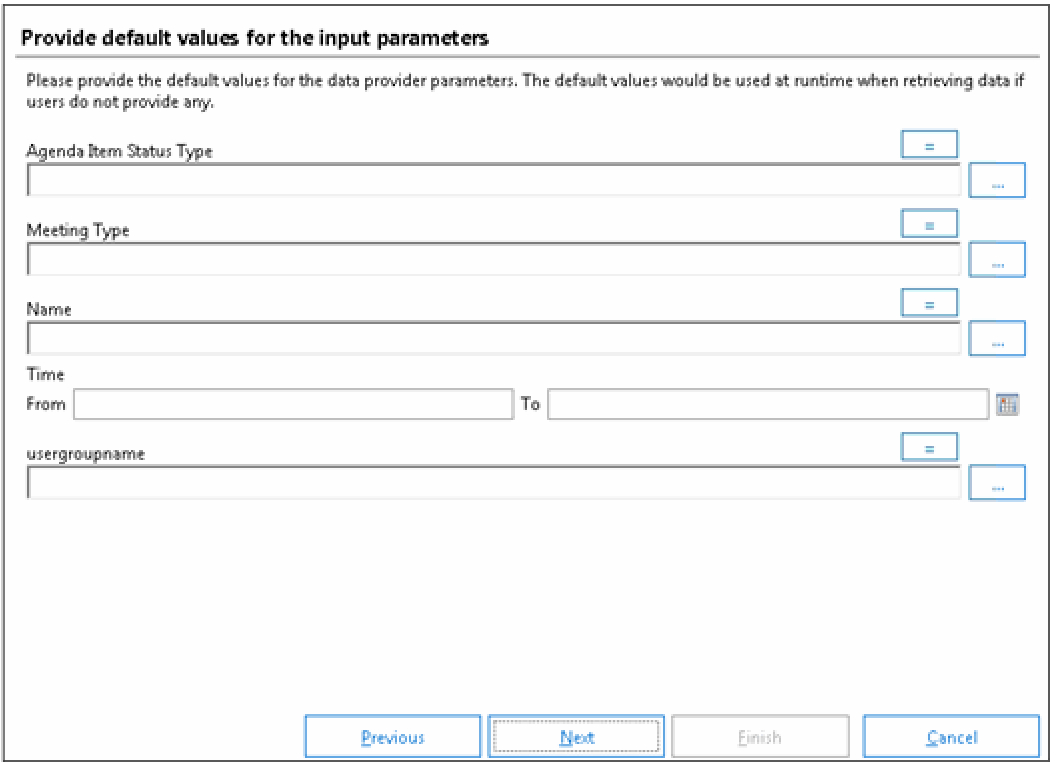
12. Select the **Input Parameters** tab. The input parameters are displayed.



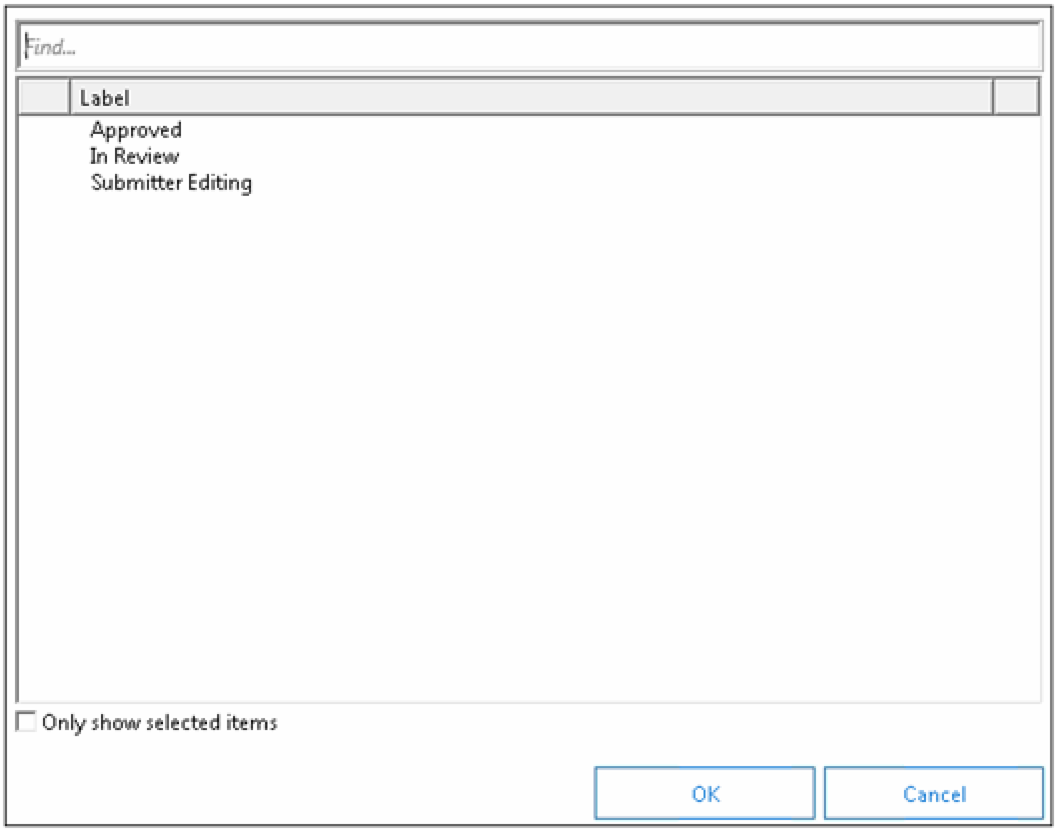
13. Select the parameters you want to allow on the dashboard from the **Input Parameters** tab. Most of the column names are straight-forward, but the following is a list of columns that may need clarification:
    - **usergroupname**. This is the submitter group name
    - **Time**. This is the time of the target meeting.
    - **IsClosed Session**. A 0 represents a non-closed session, whereas a 1 represents a closed session.
    - **Name**. This is the user name of the submitter.

    You can also select **All** to display all columns, or **None** to display no columns.

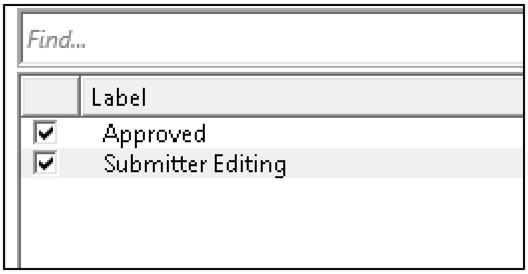
14. Click **Next**. If Input Parameters were selected, the **Provide default values for the input parameters** dialog box is displayed. If no Input Parameters were selected, continue to step 16.



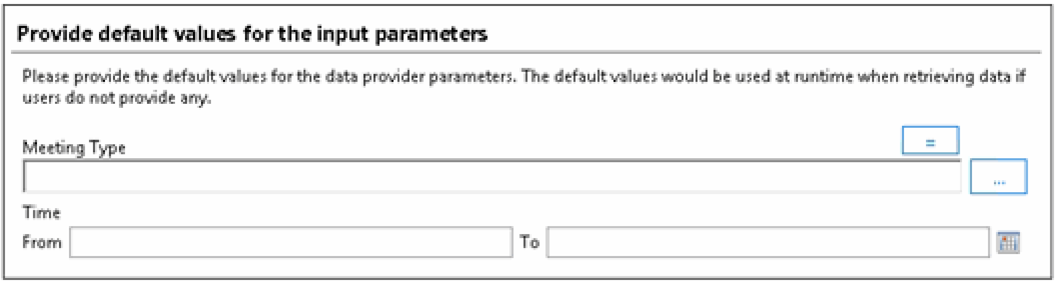
15. You can select from the values provided to filter the initial query on the dashboard. For example, if you select the ellipsis button next to each field, a dialog box is displayed listing available parameters.



Select the parameters you want, and then select the check box that is displayed to include the label(s) as a filter.



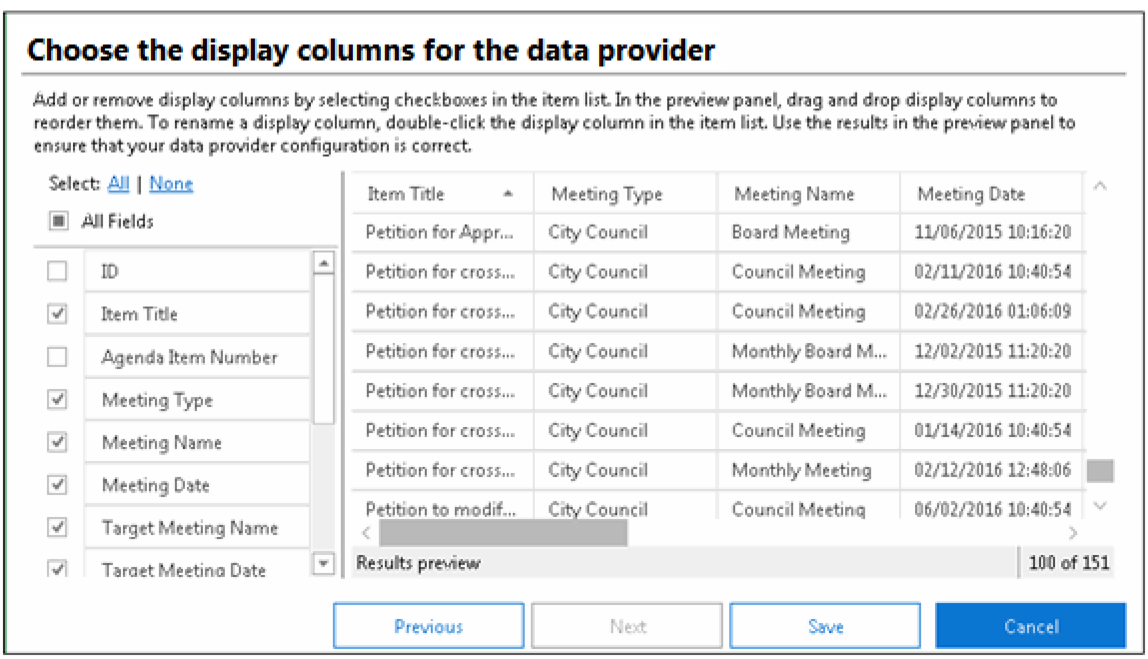
Click OK to return to the **Provide default values for the input parameters** dialog box, and to display the selected parameters.



16. Click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

Note: If the **Restrict user input to select list values** option was selected in the **Edit SQL Parameter** dialog box, you are required to select a default value for the select list prior to selecting display columns for the data provider. Select a value from the drop-down select menu and click **Next**. The **Choose the display columns for the data provider** dialog box is displayed.

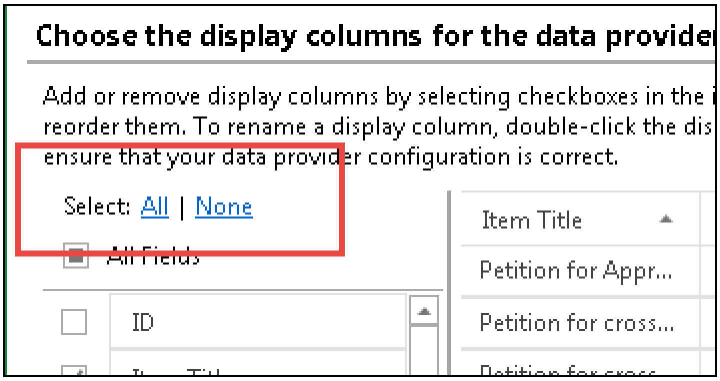
The display columns available depend on the data provider type being configured. If the data provider being configured allowed you to pre-select the display columns available, only the display columns selected earlier in the configuration process are available.



17. Select a display column to include it in the results, or deselect it to hide it.

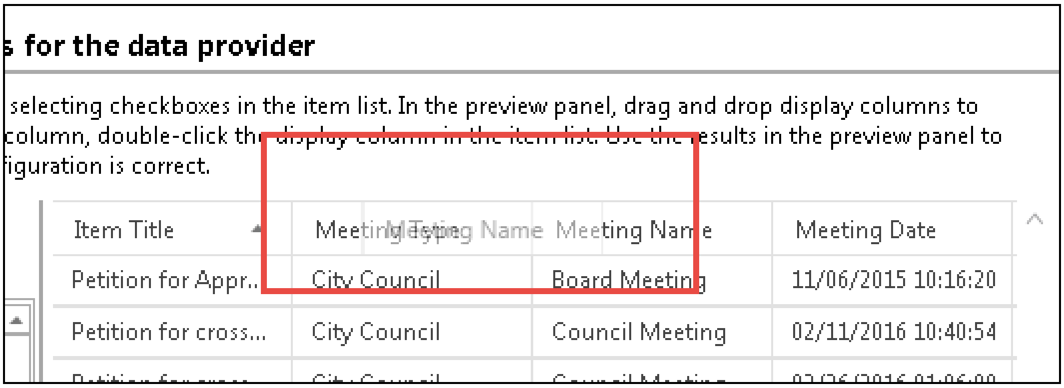
Note: In order for users to be able to open a document directly from a dashboard, the system Keyword Type **Document ID** must be included as a display column.

Click **None** to deselect all display columns or click **All** to select all display columns.



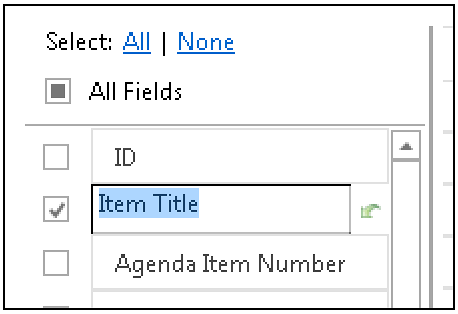
Tip: A preview of the type of data that is returned with the display columns selected is displayed in the preview pane at the right of the list of display columns. If the data returned is not acceptable, select different display columns or click **Previous** to reconfigure previous aspects of the data provider.

18. To reorder the display columns, drag-and-drop the column headings in the preview pane to put them in the desired order.

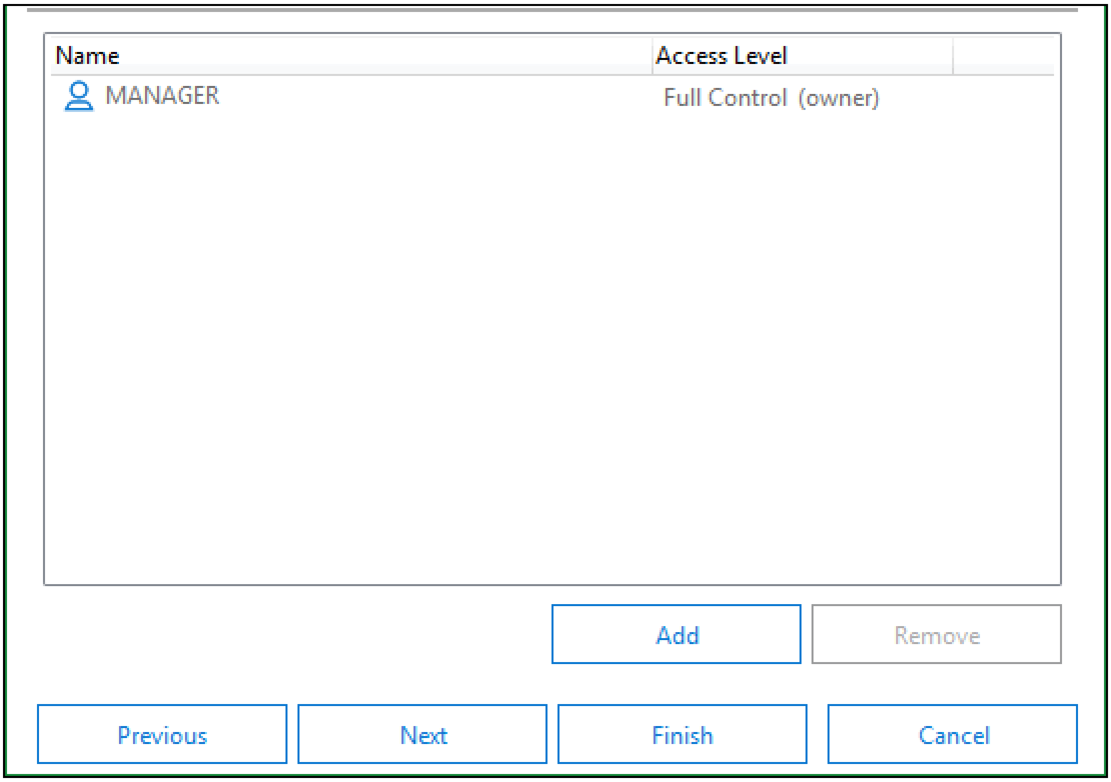


19. To rename a display column, double-click the name in the list, and type the new name in the field provided. Click anywhere outside the field to save the changes.

Note: Display column names must not be blank or end with a space.



20. Click **Next**. The **Who should have access to the data provider?** dialog box is displayed.



21. To grant access to a new user, click **Add**. The **Select Users** dialog box is displayed. Only users and users groups with access to Agenda are listed.

22. Click **Next**. The **Summary** dialog box is displayed. Review the information in the main pane to confirm that the data provider is correctly configured. If not, click **Previous** to return to the various configuration dialog boxes so that changes can be made.

23. Click **Finish**. The data provider is saved and is available for use with dashboards.