A Guide to Meetings

The core part of the documents tool is managing meetings and linking them with all the relevant agendas, minutes and other documents. Meetings are designed to be edited over time so you can create one as soon as you have the date and then set the other details and upload documents closer to the date or even after the meeting.

As the homepage has a small section to say when the next meeting date is, it's a good idea to add in the next meeting as soon as you've agreed a date. You can always change it later.

All Meetings

The meetings tab displays all meetings (past, current and future). They are automatically displayed with the newest/most recent meetings at the top.

Add a new Meeting

Create a new meeting by clicking the blue *Add Meeting* button next to the title on the main *Meetings* page.

When you first create a meeting, you can only add the basic details. Agendas, minutes and other documents can then be added once the meeting has been created. You can change all details at a future point when you click *Edit Meeting*.

Try to make the meeting name as descriptive as possible. Even though meetings are organised by date on the public page, this will be the first thing people say. Something simple like May Meeting or April Meeting and APM for example.

You'll need to choose a time and date now although these can be changed later. The location is optional at this stage though – usually something simple like Hopkins Hall, Hillesley is sufficient but you can type a full address if you would like to.

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- Dashboard
- Profile
- **Meetings**
- Announcements
- Happenings

Add a New meeting

Click here if you didn't mean to create a new meeting! → Cancel

Meeting Name

Meeting Date
dd/mm/yyyy

Meeting date goes here in the form dd/mm/yyyy

Meeting Time (24hr)
--:--

Time in 24hr format (eg 20:00)

Meeting Location

Location is optional and doesn't have to be a full address

Scrolling down, you can also add a 'Public Note'. This is just a short message to display by this meeting that give the public some additional information. For example, "The county councillor will be attending this meeting". This field is entirely optional. (And of course can be written/changed later!)

Don't forget to click save to publish the meeting once you're finished!

Public Note

Type or paste a note here

This note can be viewed by the public.

The agenda, reports and additional documents can be added once the meeting has been created.

Add meeting

Remember to click Add Meeting to save and create this meeting!

Once you click save, you'll automatically be taken to the *Edit Meeting* page for this meeting so that you can upload any documents if you have them ready. You should also see a green confirmation/success message!

Edit an Existing Meeting

You are automatically sent to the edit meeting page when you create a meeting but you can also go to it straight from the meetings list.

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Edit Meeting   Click here to return to the list of all meetings →   **View All meetings**

Meeting Name
New Meeting

Meeting Date
24/04/2022

You can change all these details from when you created the meeting. Read the previous page on this document if you need additional info about them!

Meeting Time (24hr)
20:00

Meeting Location
Hopkins Hall, Hillesley

Public Note
This Meeting is to show how easy it is to create a meeting!

Click save here if you have changed any of these text-based details

This note can be viewed by the public.

Save all Changes

Delete this meeting
Caution: This cannot be undone.

Cancel
This will discard current changes.

This will permanently delete this meeting
(Cannot be undone!)

If you have changed any of the details above and don't want to save them, you can click here to leave them as how they were before you changed them.

Scroll down on the edit meeting page to add or change documents!

Add Meeting Documents (Agenda, Minutes, Reports)

Scrolling down on the edit meeting page, you can manage meeting documents. (You need to create the meeting first if you haven't already!)

All meeting documents must be uploaded in PDF form. Usually your browser will only let you select a PDF file but just be careful to only select a PDF if it doesn't appear to stop you! (Initially, all the documents will say they are yet to be uploaded but of course this will change once you do upload them!)

Each document has it's own separate box and save button in this section. In this example, the agenda has already been uploaded.

Click this blue text to view the currently uploaded document.

Delete this upload (without replacing it)

Meeting Documents

Agenda   Remove
View Agenda

Change Agenda
Upload a New File.

[Choose file | No file chosen]

PDF accepted only. How to Convert Word Doc to PDF.

Save

Minutes

Minutes Not Uploaded Yet.

Add Minutes
Upload a New File.

[Choose file | No file chosen]

PDF accepted only. How to Convert Word Doc to PDF.

Save

County Councillor Report

Not Uploaded.

Add Report
Upload a New File.

[Choose file | No file chosen]

PDF accepted only. How to Convert Word Doc to PDF.

Save

You can replace the currently uploaded agenda using this button. Make sure you click save once you have chosen the file!
(This will delete the old agenda)

Click here to choose a file from your computer to upload. You will need to click the little save button here once you have chosen your file!

You should receive a confirmation message that looks like this when you have uploaded a file (it will display at the very top of the page when it reloads). Try viewing this file by clicking the blue 'View' text in the document's box if you're not 100% sure it worked correctly. **(Continues on next page)**

File Uploaded Successfully.   ✕

Get in Touch!
If you have any issues or problems with these instructions, please do not hesitate to get in touch!

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There are boxes for agendas, minutes and reports from district and county councillors, but from time-to-time, you may have additional documents for a meeting. You can also upload these from this page.

You will need to provide a name for any additional files. Try to choose something descriptive as this name will be displayed to the public. This file name doesn't need to be the same as it's existing name and you don't need to include the .pdf bit. You can't upload two additional files with the same name.

District Councillor Report

Not Uploaded.

Add Report
Upload a New File.

| Choose file | No file chosen |

PDF accepted only. How to Convert Word Doc to PDF.

Save

ARandomFile.pdf

View

Remove

Upload an Extra File

For example, a one-off report to be discussed at this meeting.

File Display Name

Upload a PDF File.

| Choose file | No file chosen |

PDF accepted only. How to Convert Word Doc to PDF.

Save

This file is an additional file I just uploaded. You can view or delete it here.

Enter the file name here
(you don't need to include the .pdf bit)

Select the file from your computer here and make sure you click save once you have!

Each additional file will have it's own box in this section and they will be displayed in the order that they were uploaded.