

Minutes Training (with CP Media)

Training

1. Accessing the Minutes Module through the agenda
2. Review **View: Minutes Settings** page (as applicable)
 - a. Show Items by Short Name
 - b. Auto-timestamp when “Set Current” is selected
 - c. Starting Livestream
 - i. Must select **Set Live** and **Set to Current Time** next to Actual Start Time
3. Taking **Roll Call**
 - a. Show how to manage Board Members in settings
 - b. Review roll call method:
 - i. Manual Roll Call entry
4. Review **View: Minutes Preview** page to show Minutes document’s starting layout and structure
5. Review **View: Minutes Summary** page and how to access **Edit Mode** where discussion will be added.
6. Review **View: Edit Mode** page
 - a. Navigate the agenda using agenda on right hand side
 - b. Add a timestamp if Auto-timestamp was enabled (CP Media specific)
 - c. Discussion field to add text to the minutes document.
 - d. Go over option to use Text Snippets and where they can be modified in settings
 - e. Review **Motion and Vote** method:
 - i. Manual Vote entry
 - f. Review how to add a **Speaker**
7. **End of Meeting Tasks**
 - a. End Livestream by clicking “End Live” on View: Minutes Settings page
8. **Finalizing and Publishing Minutes**
 - a. Marking items as finalized
 - b. Reordering the minutes
 - c. Show how to edit header and signatures (when applicable to customer)
 - d. Show discussion that is appearing on View: Minutes Preview
 - e. Adding post-meeting documents to include in minutes packet
 - f. Generate Minutes file
 - g. Upload Minutes to item for approval at next meeting
 - h. Publish Minutes file
9. **Optional (Time Allowing): Managing CP Media from Event**
 - a. Review View: Event Media page
 - i. Upload Media
 - ii. Purchasing Media Services
 - b. Review View: Live Meeting and Timestamp page
 - i. Import Agenda for timestamping
 - ii. Add Timestamps
 - iii. Start and Stop Stream