Cheat Sheet: Creating and Modifying Agenda Items

This cheat sheet can be used to walk through the process of creating and modifying agenda items. This is a general guide which may not reflect all the possible options, buttons, menus, or customizations in place for your account.

Please contact your department head or your account administrators if you have any questions regarding system usage.

Locating an Agenda (to create a new item)	1. From any page, click the "Agendas" button in the top navigation bar 2. Scroll down to locate the current agendas. By default, the system shows all upcoming meetings (use the Filters box to narrow/expand results) 3. Click the name of the agenda you would like to add an item to
Adding an Item to the Agenda	1. On the "Agenda Details" page click the "Add Agenda Item" button 2. Choose a section from the "Select Section or Default Item" drop-down menu 3. Enter the item name to appear on the agenda into the "Agenda Item Name" field 4. Choose a selection from the "Item Category" drop-down menu that best fits your item 5. Choose a selection from the "Department" drop-down menu that best fits your item 6. Click the "Save" button
Detailing and Initiating the Item	1. On the "Item Details" page scroll down to view the content tabs (Details, Fiscal, Attachments, etc.) 2. Click each tab and enter the relevant information 3. Once your information is entered click the "Save" button 4. Review your auto-generated item/staff report for completeness 5. To start the approval process click the "Initiate" button (the first approver will automatically receive an email notification)
Locating an Existing Item (to update an item)	1. From any page, click the "Home" button in the top navigation bar 2. Scroll down to locate the "Items" tab to view your items (use the Filters box to narrow/expand results) 3. Click the name of the item to view or modify the previously entered details