



## **Novus BOARD VIEW - Executive Portal**

### **Training Manual V4.4**

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## Board View

The Board Portal is where users login with a secure username and password. This ensures that each user has access to their private information. On this site you have the ability to view the Agenda and make comments in preparation for the board meeting.



Username: 
  
 Password: 
  
[Forgot Password](#) [LOGIN](#)

## Dashboard View / Meeting Preparation



The Dashboard is the starting screen that you will be directed to upon logging into Board View.

The Dashboard View contains 4 main components for meeting preparation.

- Calendar – Shows all upcoming meetings.
- No. of Days until the meeting and No. of items that have been fully approved by staff to go on this agenda.
- Items by category, the blue bar shows the number of items in each agenda category.
- Items Reviewed and the item not yet reviewed. Items in red have had a significant change and need a last minute review.

### Calendar

Meeting Date	Meeting Type	Meeting Location	HTML	Agenda PDF	Minutes PDF
2/24/2015	School Board Meeting	Conf Room			
2/24/2015	Workshop	test			
3/1/2015	Special Meeting				
3/1/2015	School Board Meeting	Boardroom - Canal Street Milton, Florida	HTML	PDF	
3/2/2015	School Board Meeting	Boardroom, 5096 Canal St. Milton, FL	HTML	PDF	PDF

Navigation: [Home] [Left] 1 2 3 4 5 [Right] [End] ←

23 items in 5 pages

The Calendar shows all upcoming meetings in the system. It also shows the previous days meetings in order to review those that just passed. Use the scroll buttons at the bottom to navigate to see all of the meetings listed.

All future meetings will be listed here. Even though a meeting is listed, all of the items may not have been approved yet and it may not

be marked for viewing. This is the difference between those with the HTML/PDF buttons available and those that do not have these.

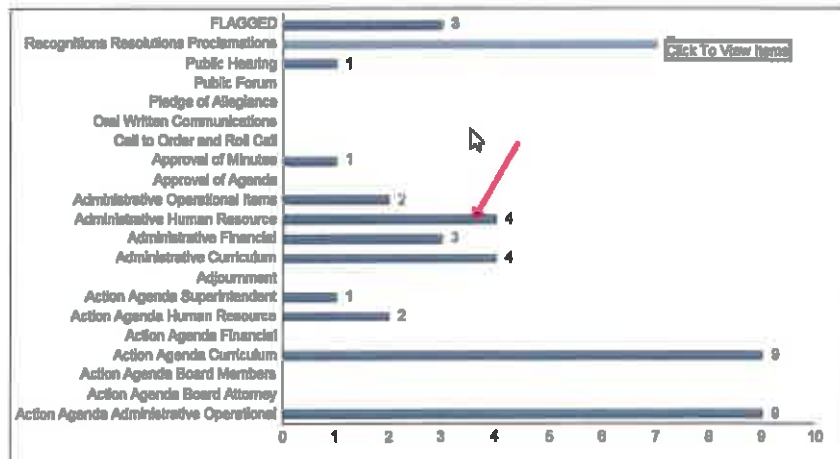
The meetings marked for viewing will be available when the HTML link is shown in the column. You can also download the agenda PDF and the minutes PDF if available. We suggest using the HTML version for the meeting since it is more efficient.

### ***Number of Days Until Meeting***

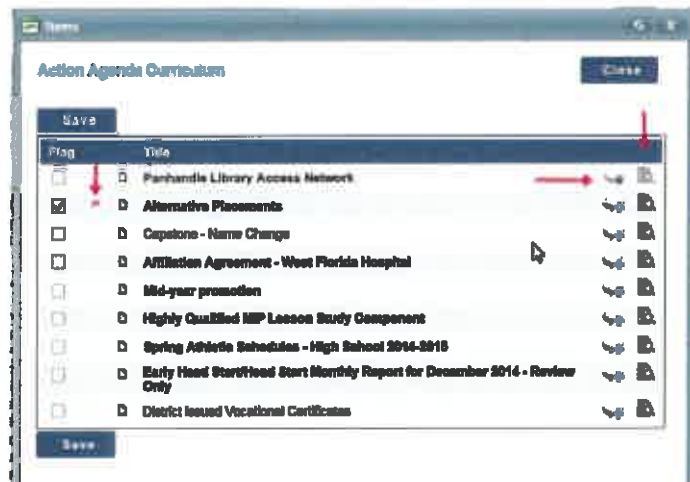


This chart shows the number of days left until the meeting, how many items are on the agenda and how many items still need to be approved by staff.

### ***Number of Items by Agenda Category***



Shows you how many items are in each agenda category. To view the items click on the blue indicator bar for that category.



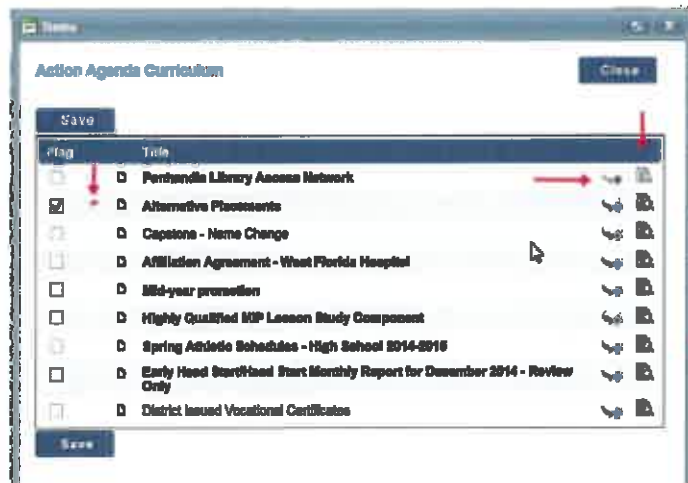
A screen listing all of the items in that category appears. Use the cover sheet link to view the item details and access Attachments. Next to the coversheet link is the comment link allowing users to add private personal comments as part of their meeting preparation.

To the left of each item title is the attachment indicator. When present it alerts the user that there are attachments on this item. Users access attachment by viewing the cover sheet.

The flag feature, far left allows users to flag items for their personal attention. Individual flags are set by each users and are only viewed by that user, not others.



Once the cover sheet is open you can review the details on this individual item. When you are finished viewing this item scroll to the top and use the back button to return to the list. Attachments are at the bottom of the cover sheet and you can open them by clicking on the attachment link



Back on the items screen you can add or access comments that you had previously added by clicking the comment bubble. Be sure to



save any comments after entering them. You can access them during the meeting. Comments are unique to you. Only you can see your comments. If the comment bubble has a Plus sign, +, on it that indicates there are no existing comments on that item.

## Flag



Click the check box next to an item to flag it for further review or for special note to come back to it later. This will put the item in category called FLAGGED on the Dashboard for that particular meeting. Clicking the blue bar for FLAGGED will bring up all items flagged for additional review. Flagged items are private and only seen by you.

Once you are finished reviewing all of the items in this category, use the close button to return to the dashboard and go to the next category.

## Items Reviewed

Shows how many items have been reviewed, how many items need to still be reviewed, and how many have been changed since your last viewing. A red indicator will appear at the top of the chart if any items have been changed since the last time you reviewed this item. This means that the agenda preparer has made a change to an item and used the notify feature to make you aware of the change.

To review any of the items that need to be reviewed you can click on the blue portion of the bar and it will bring up a list of the items needing review. You can then scroll through and review those items. You can also view the already viewed and changed items by clicking the green or red portions respectively.

### During the Meeting

Meeting Date	Meeting Type	Meeting Location	HTML	Agenda PDF	Minutes PDF
2/24/2015	School Board Meeting	Conf Room			
3/24/2015	Workshop	test			
3/1/2015	Special Meeting				
3/1/2015	School Board Meeting	Boardroom - Canal Street Milton, Florida	<a href="#">HTML</a>	<a href="#">PDF</a>	
3/2/2015	School Board Meeting	Boardroom, 6098 Canal St. Milton, FL	<a href="#">HTML</a>	<a href="#">PDF</a>	<a href="#">PDF</a>

23 items in 5 pages

From the dashboard, click on the HTML link to the right of the meeting that you want to participate in and you will be taken to the in meeting view.

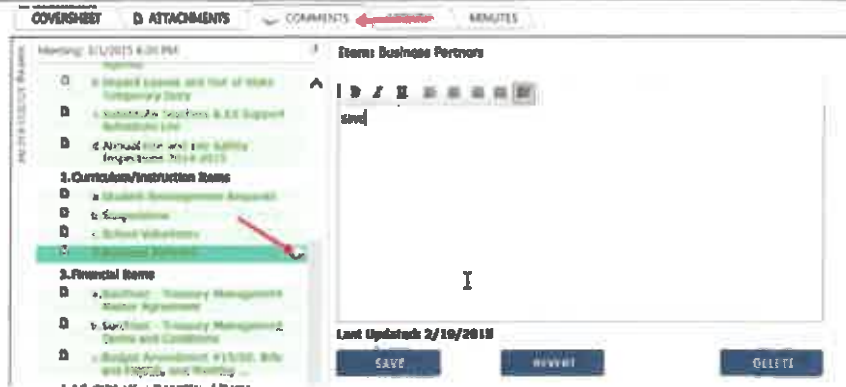
- 1. [Business Partners](#)
- 2. [School Volunteers](#)
- 3. [Business Partners](#)
- 3. Financial Items
  - 4. [SunTrust - Treasury Management Master Agreement](#)
  - 5. [SunTrust - Treasury Management Terms and Conditions](#)
  - 6. [Budget Amendment #15/02, Bills and Payroll, and Monthly ...](#)
- 4. Administrative Operational Items
  - 7. [Facility Use Requests](#)
  - 8. [Field Trip Requests](#)
- I. Administrative/Operational Recommendations- Joey Harrel ...
  - 9. [Exceed The Limit 012215](#)
  - 10. [Surplus 012215](#)
  - 11. [Food Service Quarterly Update](#)
  - 12. [DAG Architects Agenda Items](#)
  - 13. [Pinder Martin Agenda Items](#)
  - 14. [Schmidt Agenda Items](#)

On the left side of the screen is the list of all the items on this meeting agenda. We suggest using this list view because it is very efficient to navigate particularly on tablet devices which are common in today's meetings.

This list displays all the categories and items for that particular meeting. Categories have a gray background and items have a green background. From this view you can see items cover sheets, items that have comments, Attachments, and items with Flags for personal attention.



Click on an item to view the cover sheet, which will appear in the right window. If you would to make this the size of the full page, use the tack to PIN and unpin the tree view for more viewing area. Notice that the item that you selected is now highlighted. Across the top there are tabs that you can toggle through for the comments, attachments, agenda and minutes. Minutes will be available when the have been published.



Click on a comment bubble to bring up the comment or an alternate method for the bubble comment it to select the comments tab at the top.

## Traditional Agenda View

### toggling between Agenda and Minutes tabs


Once the desired meeting or comment has been selected, the meeting for that date will display on the next screen.


You now have options to view the AGENDA or MINUTES for that particular meeting date. Simply click on the <sup>Agenda</sup> “Agenda tab” or <sup>Minutes</sup> “Minutes tab” to toggle between the two screens.

If there are no minutes for that particular date, a message will be displayed:

Minutes have not yet been published for this meeting.

## Comments

- 1. Special Session
  - 1. Item Title 3.9.6 TEST
  - 2. Care Test Cat
  - 3. Item Title 3.9.6 
  - 4. Item Title 3.9.6

With an item selected, click the comment tab to add/remove comments. The comment bubble  displays on the list view to the right of an item title if there is a comment for that particular item.

### To Add a Comment



Last Updated: 5/19/2013


SAVE CANCEL

DELETE

You can then start typing in the rich text box to add a comment or edit existing text.

The Item Comment box is a rich text box. You can have options to **bold**, **italicize**, **underline** and **align** the comments. Once you have completed adding your comments, simply press "**Save**" to save or "**Cancel**" to close the window and cancel your comments.

Once you press **Save**, your comments will be saved for this item, and the window will close. Or click the cancel if comment should not be changed.

Your item will now show a  **White Comments Icon** beside the item, indicating there is already a comment for that item. You can click on that comment again at any time to edit or delete the comment.

### Delete an Existing Comment

If there is an existing comment and you want to delete it, click Delete Comment to remove the comment added.

## Search Screen / Doing Research on Past Meetings



The screenshot shows a 'Meeting Search' form. On the left, there are labels for 'Meetings Within:', 'Meeting Type:', 'Category:', and 'Containing Text:'. To the right of these labels are input fields. A dropdown menu is open, showing options: 'Last Month', 'Last 6 Months', 'Next Month', 'Next 6 Months', '1 Month Span', and 'Custom Date Range'. The '1 Month Span' option is highlighted. To the right of the dropdown are 'From:' and 'To:' date pickers. Below the date pickers are 'Search' and 'Clear' buttons, along with a magnifying glass icon.

To Search for a meeting, click the  button.

## Search for by Meetings Within

Last Month
Last 6 Months
Next Month
Next 6 Months
6 Month Span
Custom Date Range

To use the date fields, you must select "custom date range" from the "Meetings Within" filter.

### Meeting Search

Meetings Within:	Custom Date Range	From:	2/15/2013	To:	6/15/2013																																																																						
Meeting Type:		<table border="1"> <tr><td colspan="7">May 2013</td></tr> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> </table>				May 2013							S	M	T	W	T	F	S	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11
May 2013																																																																											
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29	30	31	1	2	3	4																																																																					
5	6	7	8	9	10	11																																																																					
Category:																																																																											
Containing Text:																																																																											

Other filters are *Meeting Type*, agenda *Category* and *Containing text*. Once you make your selection, press the Search button, or to clear search choose the clear button.

Meeting Type:		
Category:		
Containing Text:		<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Info"/>

## Viewing Item Details in Your Search Results

Meetings		Items	Comments		
Date	Title	Category	Meeting Type	Location	
5/30/2013	pk test item changed agn	Reports to the Board	Default Meeting	test	
5/22/2013	PK Test Item one	General Session	IDPBuilder	Conference Room	
5/22/2013	PK Test Item two	Proclamations	IDPBuilder	Conference Room	

You can view each of the item's details, by clicking on the item title.

Once you click on the item, the *Item Details* window will open with that item cover sheet displaying the details of the item.



### IDP Builder Coversheet

Ordinance Number:

Bill Number:

Report Number:

Resolution Number:

Staff:

Novus item PK test one

Displayed Title:

Novus item PK test one

Item Type:

Checkbox List Test:



Date Test:

ATTACHMENTS:


No Attachments Available



## Using the Research

Use this Research feature to search for other meetings without leaving the meeting you are currently on. It works the same way the regular search feature does.

You can do this by clicking the **SEARCH** button and searching for meeting dates that contain information you are interested in. Once there, you can view and copy important information, close the search window and paste your comments in any of the comments sections.

 Meeting Search

Meetings Within:	Custom Date Range	From:	2/15/2013	To:	6/15/2013
Meeting Type:					
Category:					
Containing Text:		Search	Clear		

Meetings	Items	Comments		
Meeting Date	Meeting Type	Meeting Location	Agenda PDF	Minutes PDF
5/30/2013	Default Meeting	test		
5/22/2013	IDPBuilder	Conference Room		
4/24/2013	IDPBuilder	Test Location	<a href="#">PDF</a>	<a href="#">PDF</a>
4/1/2013	Default Meeting	test	<a href="#">PDF</a>	
3/31/2013	IDPBuilder	Test Location		
3/31/2013	Default Meeting	PK Test Location		
2/28/2013	IDPBuilder	Mike's Office	<a href="#">PDF</a>	

## **Request to Speak**

**This button will appear on the top left of you screen if the minutes taker has activated the speaker queue option. Once activated you can request to speak on an item by simply clicking Request to speak.**

**Note that this feature may not be active in your system and if you want to activate have your system administrator contact NovusAGENDA.**




The speaker queue will allow you to see who is queued up to speak and in what order. Click on the queue button to see that information.



**Speaking**

**Speakers**


1. Default Admin



- Allows users to view a queue for speakers during a meeting.

## Buttons & Descriptions

**Search**  - allows you to search for new meeting dates with various filters

**Research**  - allows you research for other meetings while you are currently on a particular meeting

**Comment**  - Opens the current comments for a particular item

**Edit Comment**  - allows you to edit or add comments to an item

**Delete Comment**  - allows you to delete comments

**Request to Speak**  - allows users to manage a queue for speakers during a meeting.