

USER GUIDE

KCMSD Board Item Process

Comprehensive User Manual of the Board Item Process
Kansas City Missouri School District



*Board Services
Office of the Superintendent
Information Technology Services
BoardDocs® – Paperless Governance Software*



This training manual of the Kansas City Missouri School District Board Item process is intended for the exclusive use of KCMUSD staffers. The information contained in this document cannot be distributed, modified or reproduced in whole or in part without the prior consent of the maker.



Table of Contents



OVERVIEW	4
<i>What is BoardDocs© ...?</i>	5
<i>How do I access BoardDocs© ...?</i>	5
<i>How do I submit an item ...?</i>	8
<i>How are the dates defined...?</i>	13
<i>What is the approved Board Item template?</i>	14
What are the components of the template?	17
<i>How do I make a change to my Agenda Item after I submitted it to the Approver...?</i>	19
<i>What is the District's Approval Routes for processing a Board Item?</i>	22
<i>Email notifications regarding my Board Items</i>	26
<i>Are walk-in Board Items allowed?</i>	28
<i>How do I add Attachments & Other Documents</i>	28
<i>How do I delete attachments...?</i>	30
<i>How do I print my agenda Items and attachments...?</i>	33
Public Site	33
User (Authenticate) Printing	37
<i>How can I search for a Board Item...?</i>	37
<i>What are the typical reasons a Board ITEM is rejected...?</i>	38
Header Rejection types	38
TEMPLATE Rejection types	38
Attachments	39
<i>How can I obtain training for BoardDocs...?</i>	39
<i>What is the Board Item Checklist?</i>	40



OVERVIEW

The Board Item process for the Kansas City Missouri School District is a collaborative team effort of the Office of the Superintendent, Information Technology Services and Board Services. This section of the User's Manual is primarily geared toward the end-user in providing detailed documentation on how to enter an item into the BoardDocs Agenda Software.

Understandingly, the focus of the Manual is to provide a written document on how to use the BoardDocs software, please note that the life cycle of a Board Item is a three-step process starting with the Office of the Superintendent. The following snap-shop summarizes the function of each team as a cohesive unit in the preparation of a Board Item.

- **Office of the Superintendent**
 - Monthly email reminder to the Users for
 - Publishes dates for Board Item review, signatures,
 - Assigns Board Item number for submission
 - Reviews and queues all items for final Approval
 - Item rejection or approval
- **Information Technology Services**
 - Monthly training
 - Software administration and Maintenance
 - User Training and Documentation
 - Issue resolutions with users & software
 - Reviews Board room & meeting setup requirements
- **Board Services**
 - Review and Activate the agenda
 - Rejects items not meeting standard criteria
 - Obtain signatures
 - Publish minutes and meeting notes.



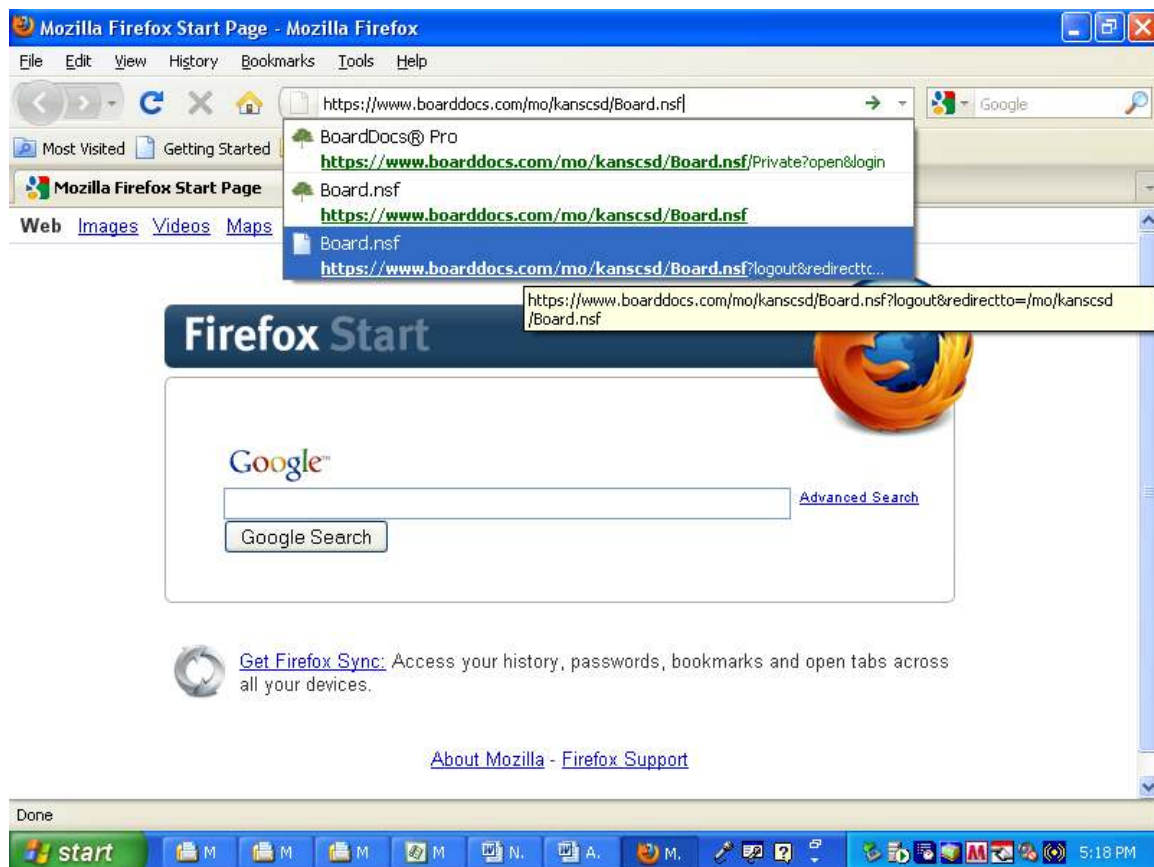
What is BoardDocs© ...?

BoardDocs© is the paperless-agenda software that the District has opted to use to help alleviate the enormous task of assembling, printing, distributing and revising agenda items and policies.

How do I access BoardDocs© ...?

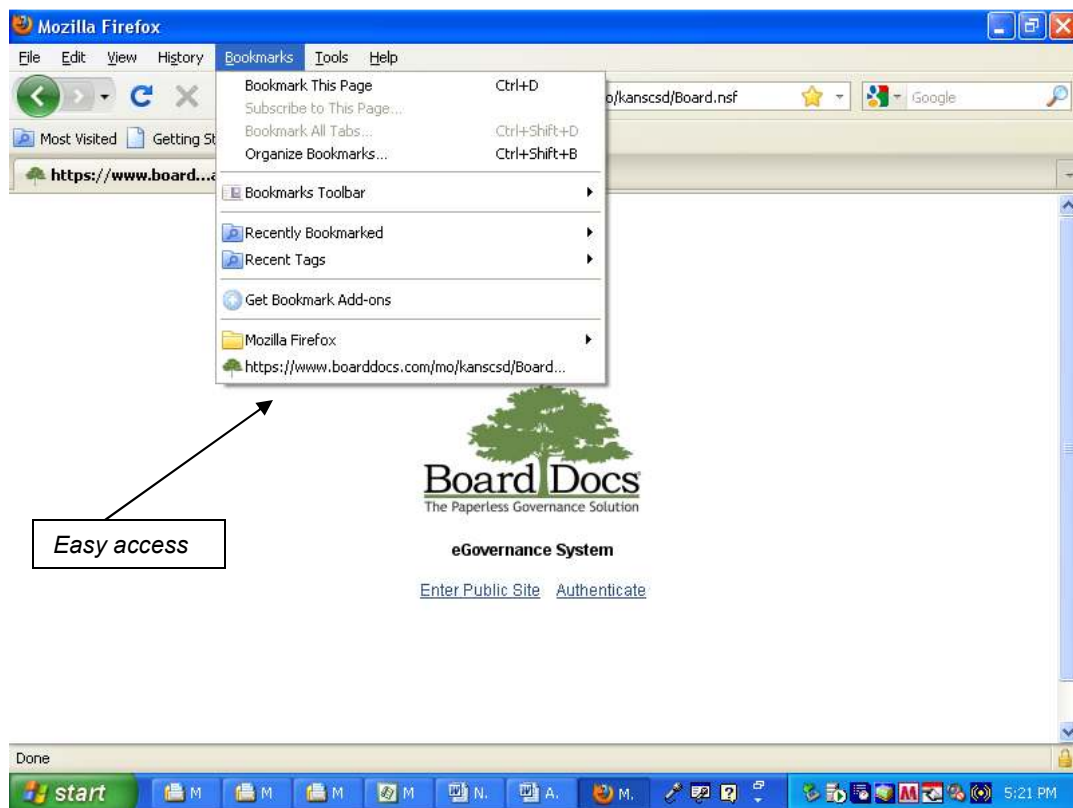
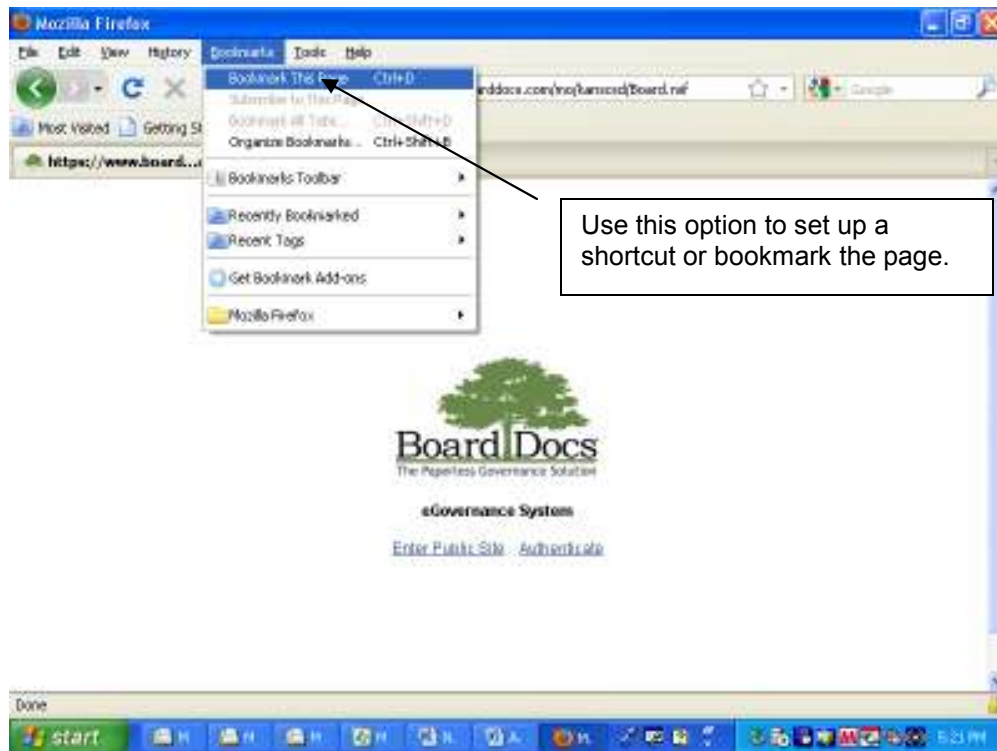
BoardDocs© can be accessed at home, in the office, on the road or any place that you have an internet connection. Each user of **BoardDocs©** has an authorized user-ID and password. The below shortcut will allow a quick link to our **BoardDocs©** members' page.

<https://www.boarddocs.com/mo/kanscsd/Board.nsf> - (the **B** in **B**oard must be in caps.)



HINT: Book Mark the page in your favorites. For best results - Access BoardDocs using Mozilla Fire/fox.





If you are using Microsoft Explorer – you can do the same





Click on the word **Authenticate** to access the login screen.





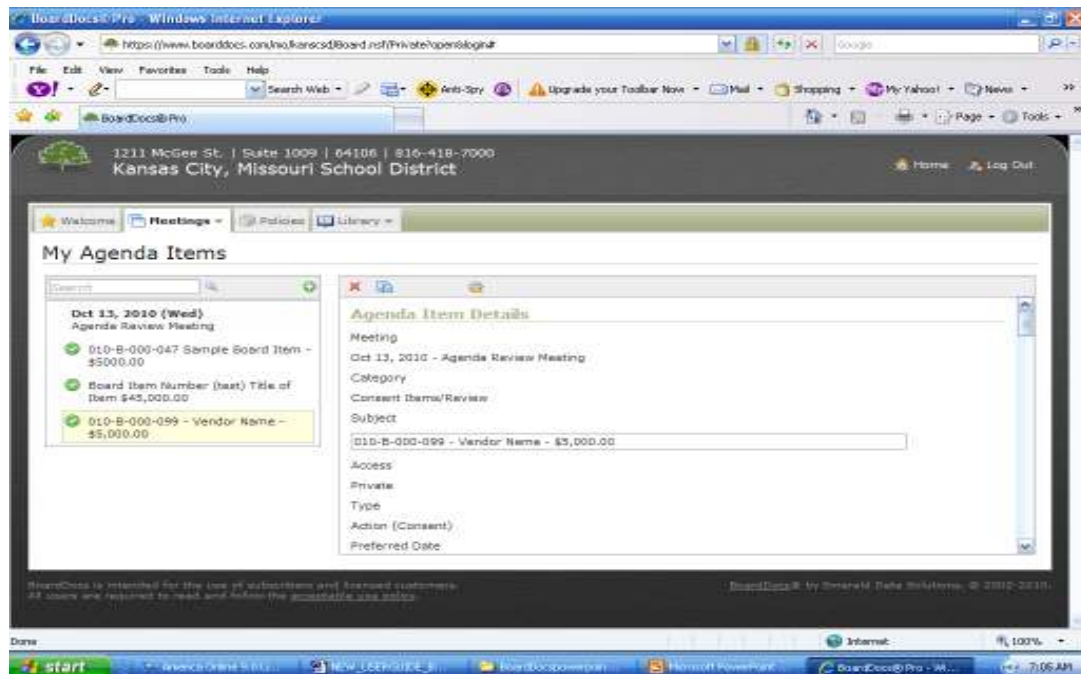
After accessing BoardDocs®, enter your authorized user ID and password. ***HINT: Case-sensitive; Enter upper case as indicated, enter lower-case as indicated.***

How do I submit an item ...?

If the item that you are submitting is a new item,

1. Find the tab –***Meetings***– and Select.
2. Select [***My Agenda Item***] a blank search window will appear. Click on the green circle with the $\pm$ sign to add a new agenda item. Complete the following:
 - ***Meeting:*** select the correct meeting date. ***Use the pull-down menu.***
 - ***Category:*** determine and select the correct Category in which the item is listed. ***Use the pull-down menu..***
 - ***Subject:*** The subject line consists of three-parts. Please keep in mind that the . Numbering assignment and convention must follow the current Districts' policy Use this handy chart as a guide to complete the subject line of your Board Item
 - a. Board Item Number
 - b. Vendor Name
 - c. Dollar Amount



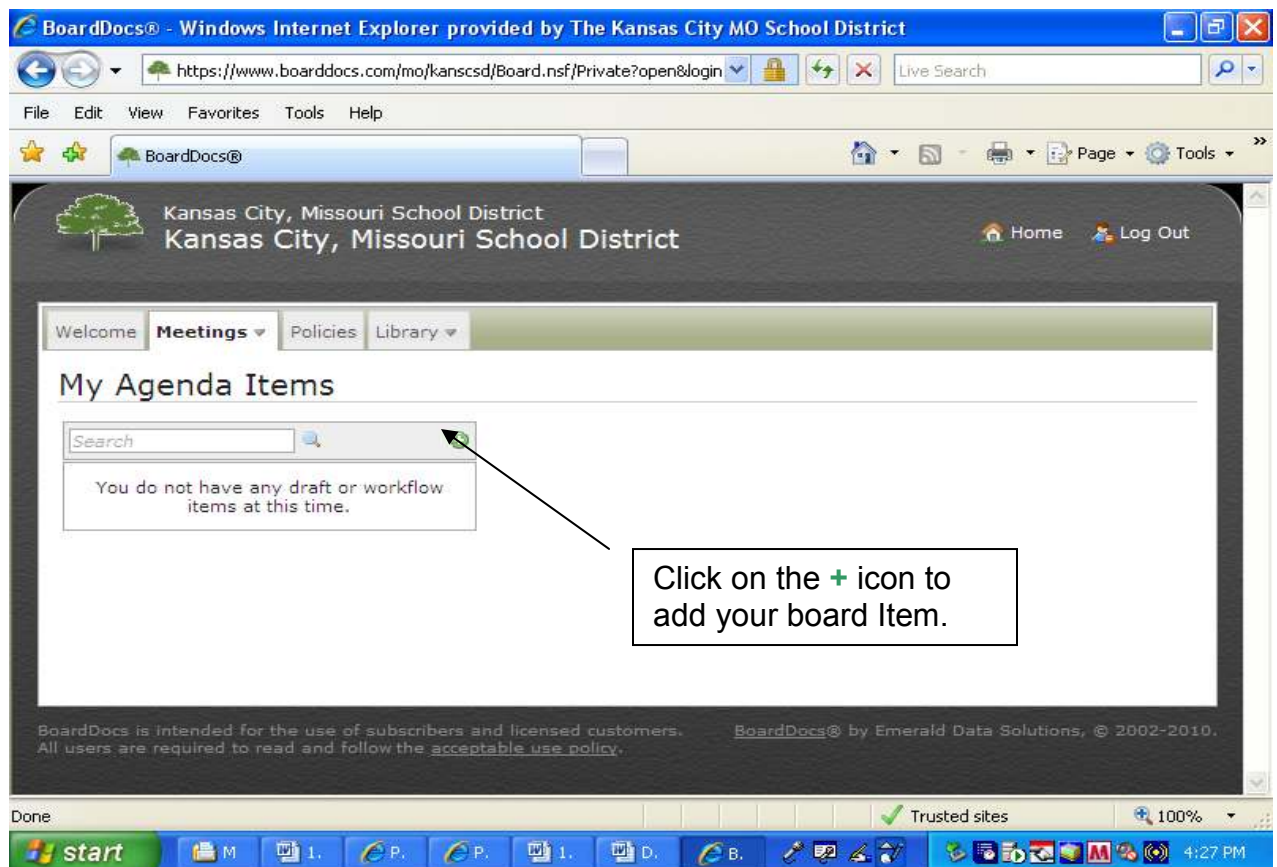
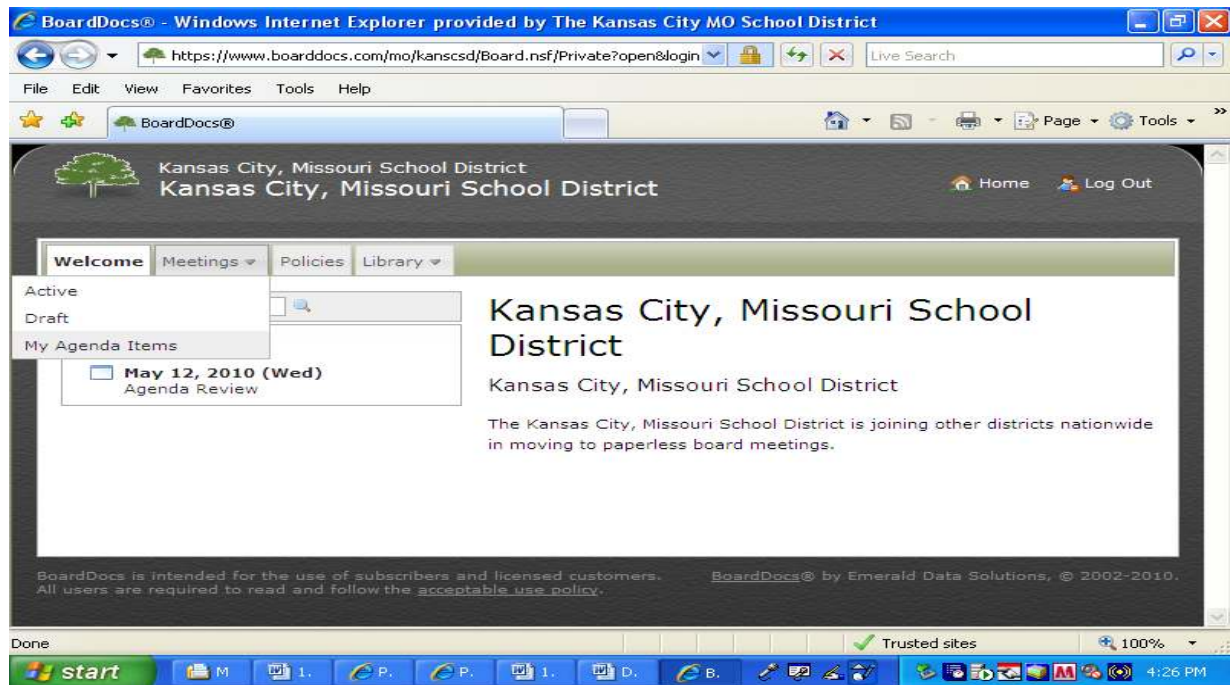


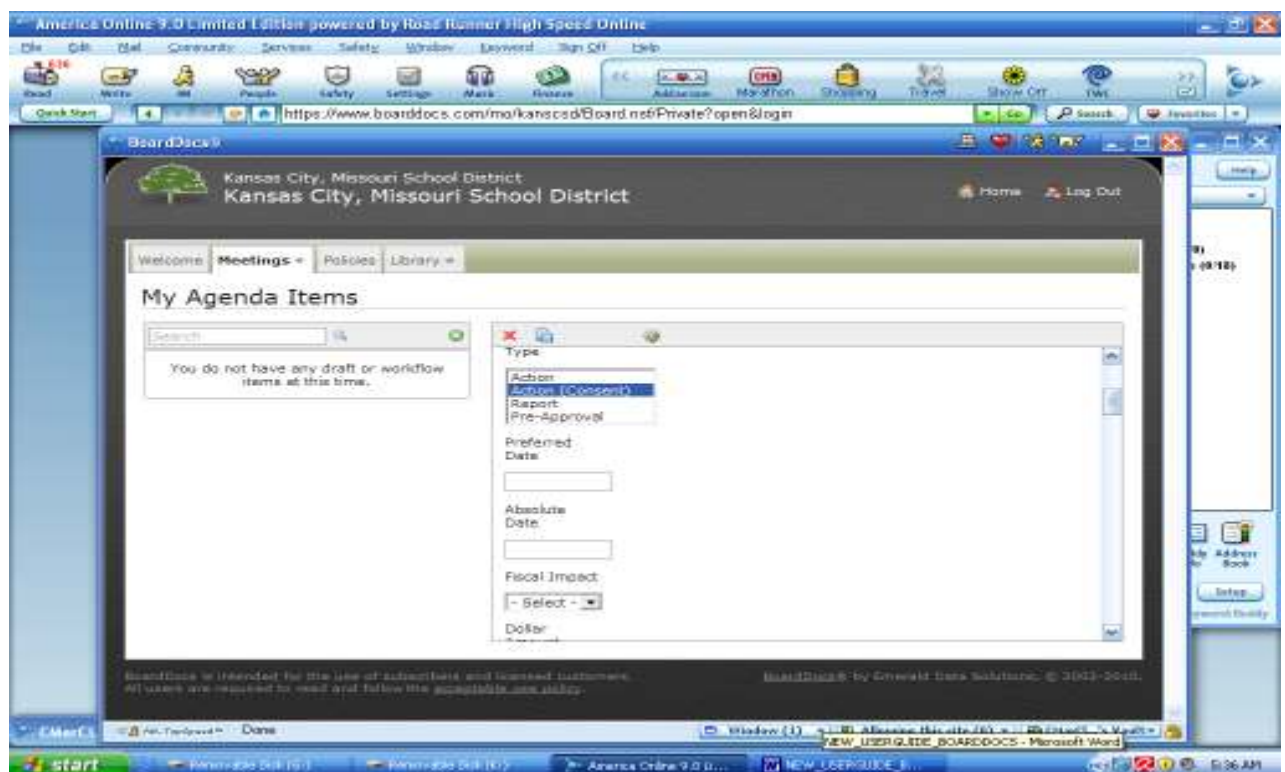
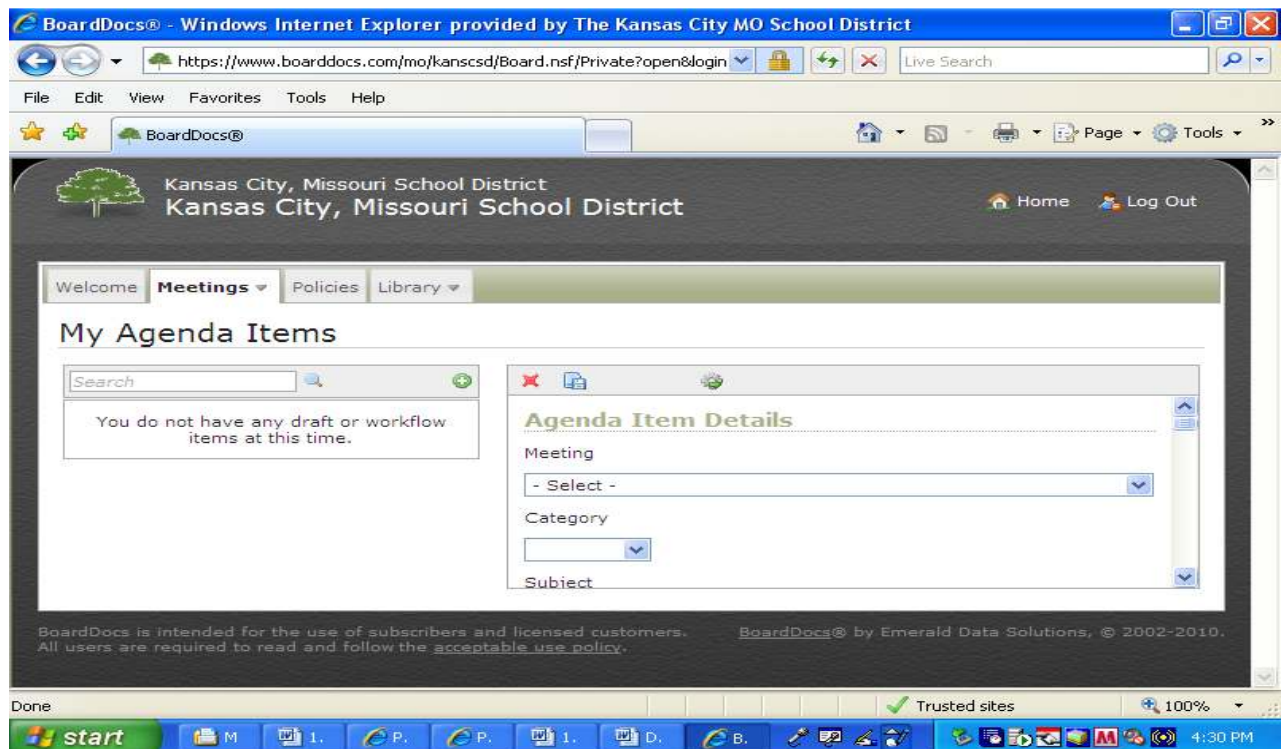
Please use a (-) hyphen to separate the components in the Subject line.

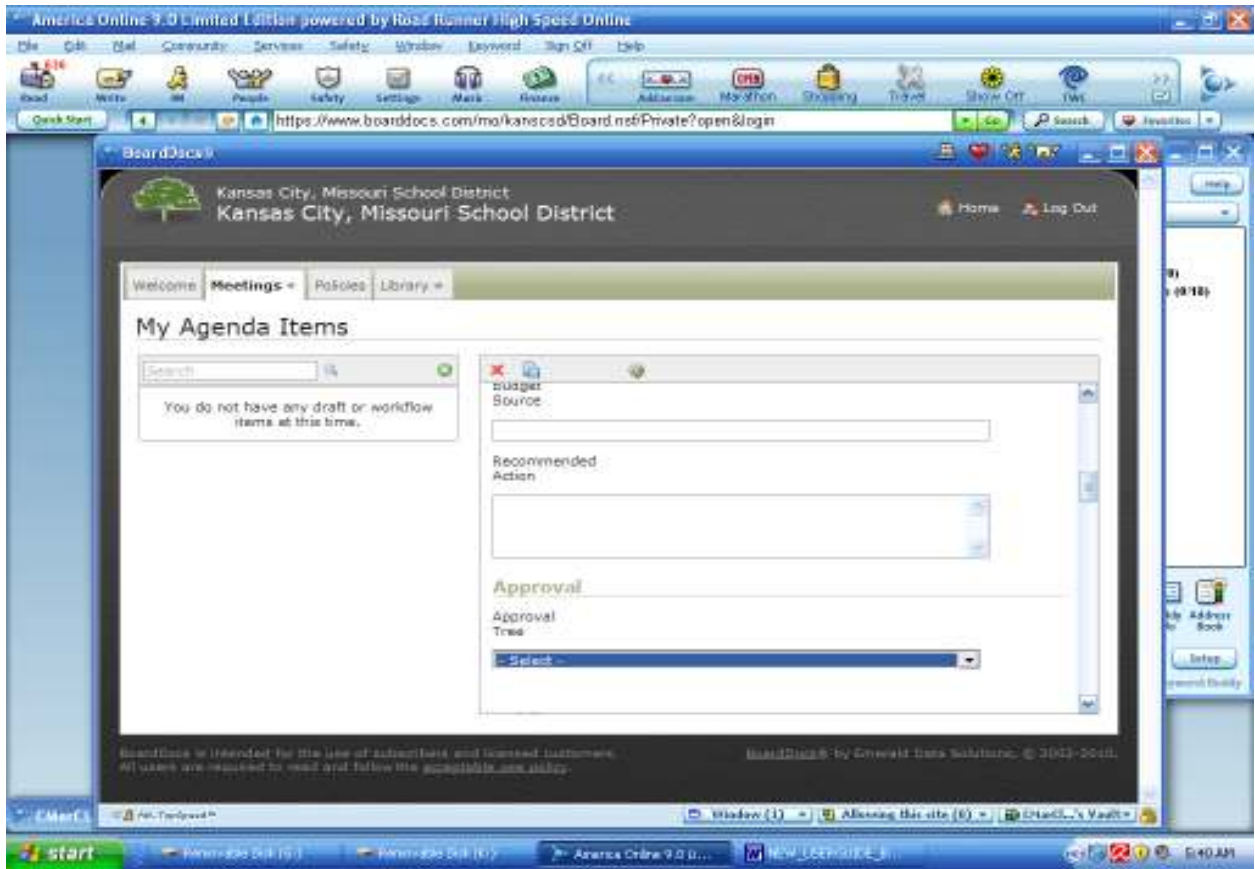
- Access: Select **Public**.
- Agenda Type: **Use the pull-down menu** to choose the applicable type for your item. The types listed correspond with the manual process of identifying a board item. *See chart below for additional help.*
- Fiscal Impact: If the item to be listed will have an impact, please select **Y**, otherwise select **N**. If you anticipate that the item will ultimately have a fiscal impact, you would also select Y. If you have questions, please do not hesitate to contact Board Services.
- Budget source: The budget source is your account number that you would use to fund an item. In some cases, the funding source might require several account numbers; if so – you can enter text in the field; *i.e. (see following)* and then list the applicable account numbers in the content of your Board Item.
- Dollar Amount: Record the total dollar amount of your proposed item. This field can remain blank until you verify the amount requested. Upon verification, find your agenda item with the category previously selected, click on edit and then you can enter the dollar amount.
- Recommended Action: **leave blank.**
- Approver Tree: **Use the pull-down menu** to choose the applicable approver tree for your item

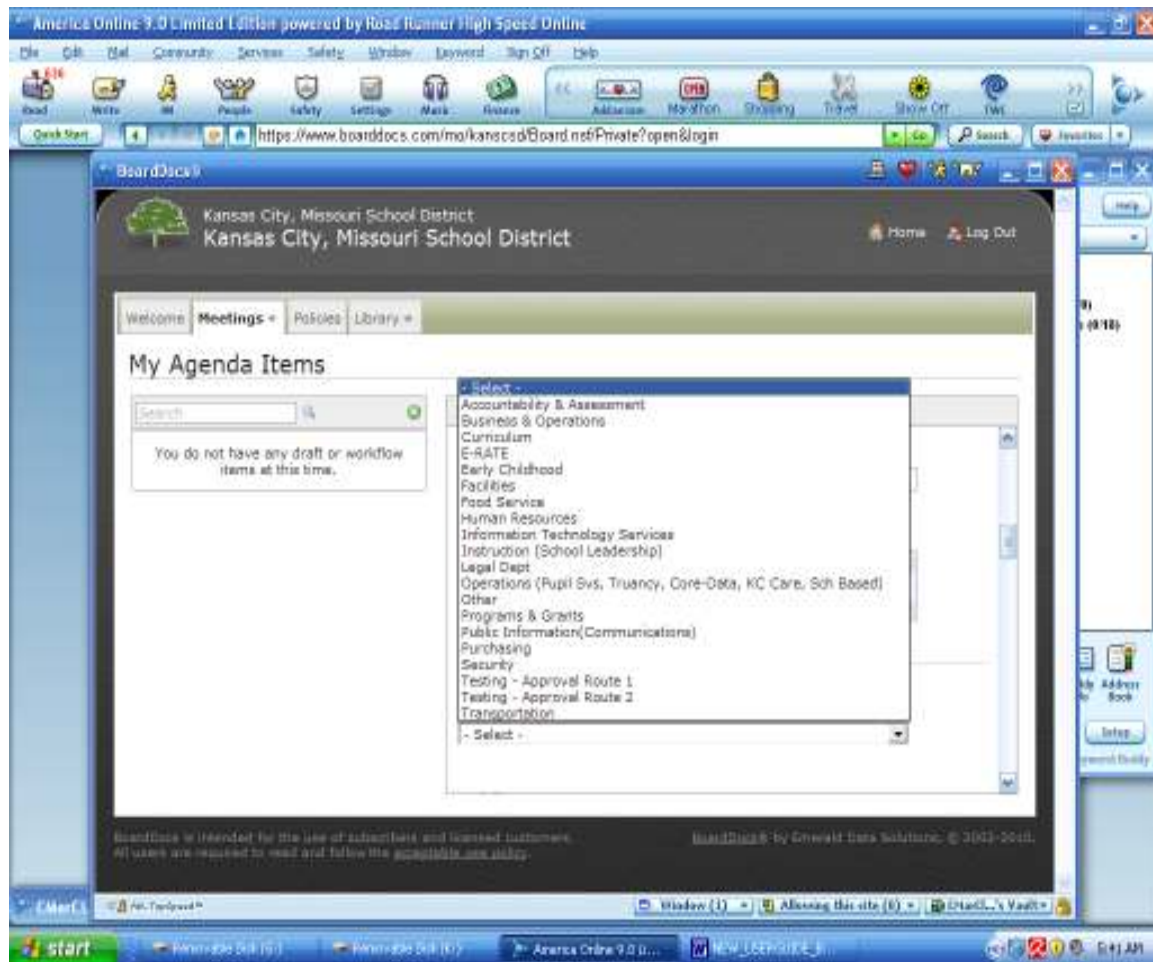
1. On the **MEETINGS** Tab – click on **MY Agenda ITEMS**.











Once you have completed the header record, you can then add your content to the **PUBLIC Content** or the **ADMINISTRATIVE Content** using the District approved ITEM TEMPLATE.

How are the dates defined...?

3. **Preferred Date** – this is the date that an item is scheduled for review. Normally, the first board meeting of the month or the **CONSENT ITEMS REVIEW Meeting** date
4. **Absolute Date** – this is the date that items are forwarded from the REVIEW committee for the second Board Meeting of the month or the **REGULAR MEETING (APPROVAL)** date.



What is the approved Board Item template?

The approved Board Item template is a standardized formatted Microsoft Word document that must be used to enter the content of your item. When entering or writing your item – please adhere to the following:

- Please do not bold, font color revisions, underline or make changes to the template, which will visually influence how the item is displayed upon review in BoardDocs.
- Please ensure that the **FONT** is **TIMES NEW ROMAN, size 12**.
- Please review for grammatical errors, misspelled words, unclear content/meaning and other such errors. HINT: Have a co-worker review your item to ensure that you have met the criteria listed below.
- Please use the appropriate template for your division.
 - Template 1 – (TO, THROUGH, THROUGH, FROM)- typical District User
 - Template 2 – (TO, THROUGH, FROM) – used by Executive Assistants, Executive Secretaries



Template 1

TO:	Members, Board of Directors
THROUGH:	J. Wm. Covington, Ed.D. Superintendent of Schools
THROUGH:	
FROM:	
SUBJECT:	
DATE:	
Item:	
PROPOSED RESOLUTION:	
ATTACHMENTS:	
REASON FOR RECOMMENDATION:	
BOARD POLICY:	
MSIP STANDARD:	
STRATEGIC PLAN GOAL & OBJECTIVE:	
PROPOSED OUTCOME:	
METHOD OF ASSESSING THE OUTCOME:	
DEPARTMENT RESPONSIBLE FOR IMPLEMENTATION:	
FACTUAL BACKGROUND:	

Template to be used by the typical BoardDocs User..



Template 2

TO:	Members, Board of Directors
THROUGH:	J. Wm. Covington, Ed.D. Superintendent of Schools
FROM:	
SUBJECT:	
DATE:	
Item:	
PROPOSED RESOLUTION:	
ATTACHMENTS:	
REASON FOR RECOMMENDATION:	
BOARD POLICY:	
MSIP STANDARD:	
STRATEGIC PLAN GOAL & OBJECTIVE:	
PROPOSED OUTCOME:	
METHOD OF ASSESSING THE OUTCOME:	
DEPARTMENT RESPONSIBLE FOR IMPLEMENTATION:	
FACTUAL BACKGROUND:	

Template to be used by the Executive Assistants.



What are the components of the template?

The components or what is required for the template is referenced below. Please view the following fill-in example of a typical board item.

Sample A: Board Item Format (Times New Roman 12 pt.)

TO: Members, Board of Directors **(always addressed to the Board Members)**

THROUGH : J. Wm. Covington, Ed. D. Superintendent of Schools **(Supt's name & Title)**

THROUGH: James Doe, Assoc Supt of Widgets, **(name of Executive Cabinet Chair – or whom do you report to?)**

FROM: Jane Doe, Executive Director of Sampling **(name and title of person submitting)**

SUBJECT: Husch Blackwell Sanders LLP Statement for Legal Fees for June 2010-\$203,159. **(If a purchase - Identify what you are purchasing; vendor name, subject or services and the amount. If a MOU, service agreement, or other agreements, follow the same method in identifying the what, why, the vendor name and dollar amount; including zero dollar amounts).**

DATE: Month, Date, Year **(2nd Board meeting of the Month)**

BOARD ITEM: 010-B-XXX-XXX **(number received from Supt's Office)**

PROPOSED RESOLUTION: Move the approval of the recommendation of the Superintendent of Schools to approve the Purchase and maintenance of **(Describe in full the - who, what, where and why you want the item to be approved. The resolution must also include the Vendor Name, the amount, the account number.**

ATTACHMENTS:

Quote of purchase of rental units

Memo of Understanding XXXX

Service Agreement XXXX

Previous year Board ITEM XXXXX

Vendor's certificate XXXX

(all Attachments must be in PDF format, naming convention and sequence of attachments must match when you upload the item into BoardDocs. Sampling of attached documents could include the above listing):

REASON FOR RECOMMENDATION: Board approval is required for expenditures that exceed one hundred fifty-thousand dollars (\$150,000) per Board Policy 4.3 Financial Condition & Activity **or** The Superintendent of Schools requires all contracts/service agreements to be considered by the board per Policy 4.3 Financial Condition & Activity.



BOARD POLICY: Per the item that you are proposing – you must refer to the Board Policy Manual. *For Policy Category: Executive Limitations – found in sections 4.0 – thru 4.8. Make sure you refer to the applicable Executive Limitations when writing your item. Please include the Ends Condition Policy 1.0 as found on page 3 of the Board Policy Manual.*

MSIP STANDARD: 8.11 The District's facilities are safe. *(All MSIP standards are posted on the KCMSD website. You can also access the MSIP standards in BoardDocs. Please click on Library. The navigation path on our website –Access the District's website -. Click on About KCMSD -> View the Links on the Right Side -. Scroll down to MSIP information*

STRATEGIC PLAN GOAL AND OBJECTIVE: Goal 3: Operate efficient and effective supports for learning. Objective 3.10: Provide adequate technology resources for students and staff. *(Follow the same navigation path as above – access the KCMSD website -> click on About KCMSD-> View the Links on the Right Side -> scroll down to MSIP information -> midway thru page – see Useful Documents -> click on Final MSIP Accountability Turnaround Plan Submitted to the State (Updated 01/13/09). Plan and objectives can be found in this document.)*

PROPOSED OUTCOME: The proposed outcome is to provide for a safe and secure technical environment. *(The outcome must be applicable to the Board Item that you are proposing.*

METHOD OF ASSESSING THE OUTCOME: *(Identify the process or method that you set up to record contract effectiveness, tracking measureable results, gains, ongoing review to ensure compliance.)*

DEPARTMENT RESPONSIBLE FOR IMPLEMENTATION: Information Technology Services. *Identify the department who is the key stakeholder or responsible party for the implementation)*

FACTUAL BACKGROUND: On March 11, 2009, the Associate Superintendent of Human Resources requested signature for Service Agreement with Trane Parts Center of K. C. for the emergency rental of Move-N-Cool portable air conditioners for the MDF closets in various schools. The agreement was signed covering the term of 3 months, March 2, 2009 to June 30, 2009. A purchase order was issued to cover three months of rental. On July 31, 2009, the Legal Department drafted another Agreement between the School District and Trane Parts Center of K. C. covering the rental of from July 1, 2009 to June 30, 2010. Another Purchase Order was issued to cover additional three months of rental through September 30, 2009. On September 22, 2009, the ITS Department requests review and approval to purchase, with maintenance included, the emergency rented Move-N-Cool portable air conditioners from Trane Parts Center of K.C. *(Provide relevant background pertaining to your Board Item. For example –state a specific reason as to why the purchase. Provide a brief timeline, identify which locations or locations that will benefit and the value-added that will be gained upon approval of the board item.)*

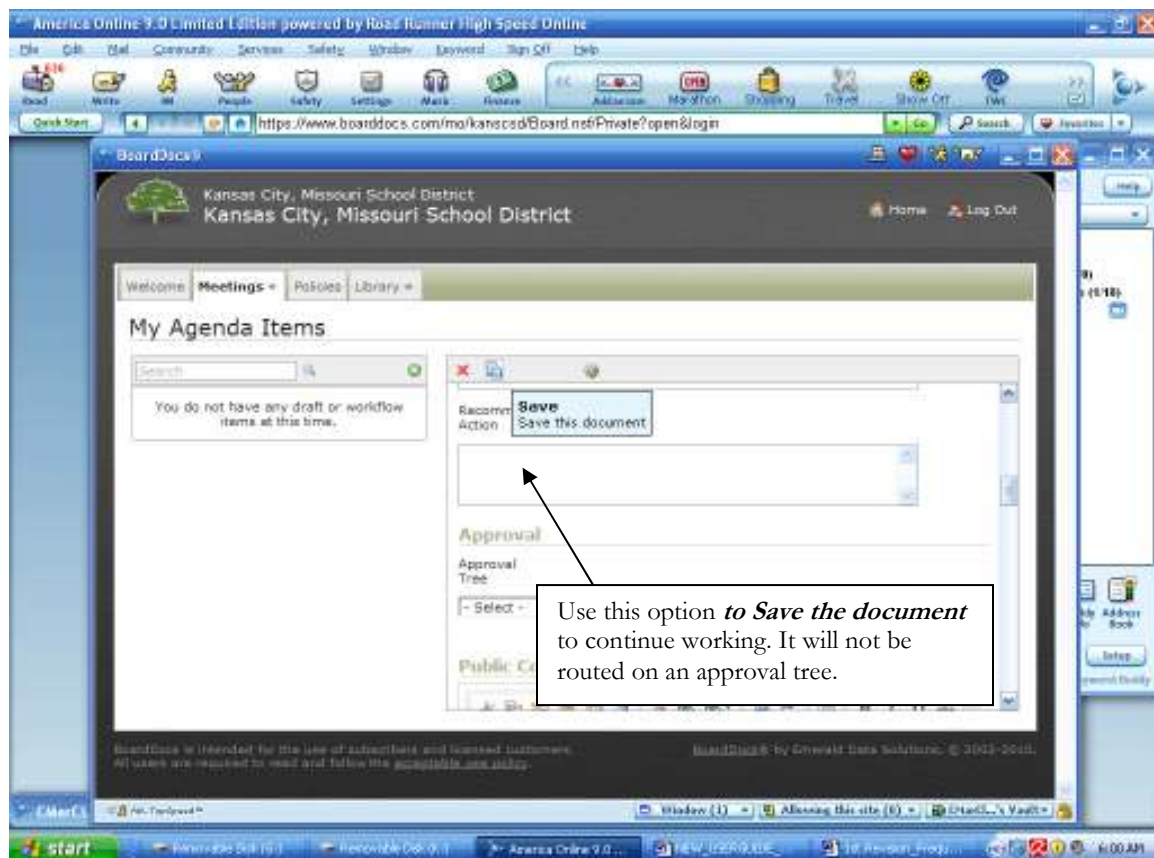


How do I make a change to my Agenda Item after I submitted it to the Approver...?

You can edit the Board Item upon selecting ***Save this Document***. The Item is not routed to the Approver. This would allow you to continue working on the item until you have all of your supporting documentation from the various departments

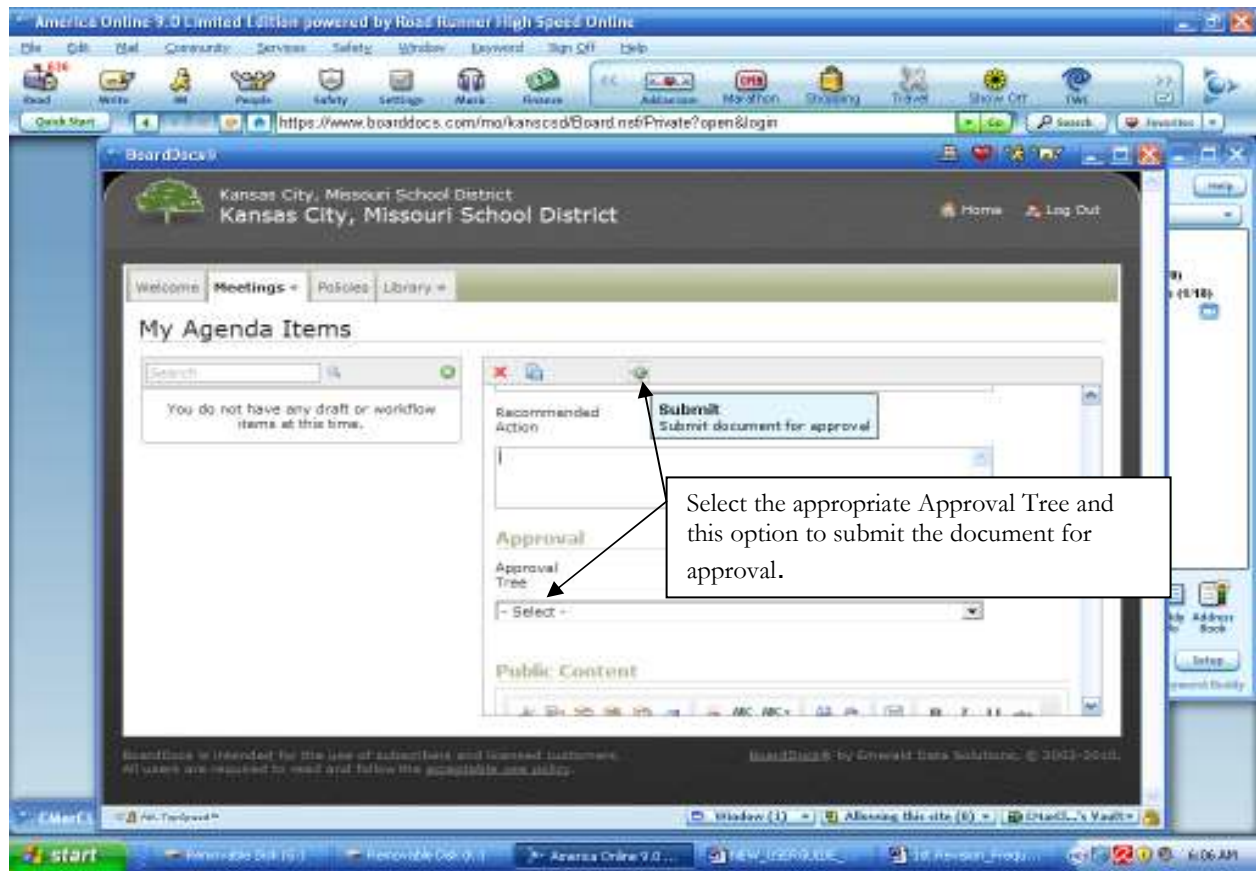
IF the Item is waiting to be approved by the BUDGET DEPT. – you can edit the item to make any necessary changes. This is the only opportunity to make changes to your item prior to the 1st level approver approving the item.

Once the Item is approved by the BUDGET DEPT., you (the Originator) cannot make any additional changes. THE 1st level approver can make the necessary changes or corrections that are required prior to final publishing by the Board Secretary. The 1st level approver can; however elect to **REJECT** the item to be routed back the ORIGINATOR.



Upon completion of your item, click on ***Submit document for Approval*** and your item is routed for approval by the chosen Approval tree.





The originator can edit the ITEM before approval. For example; if the Item is routed to the Budget Department and it is waiting for Approval, the Originator can edit the item.



The originator can REJECT the ITEM before approval. This is necessary if the originator must make additional changes to the item.

All items submitted within BoardDocs can be modified, corrected and/or edited for grammar and other errors. Within the life cycle of the Board Item approval process – you have a small window of opportunity between each approval level to make the necessary changes prior to item activation for publishing.



The following FAQ will help you determine when.....

		Approve <u>Y</u> or <u>N</u>	Edit <u>Y</u> or <u>N</u>	Explanation
Originator enters item	Routed to Budget	<u>Yes</u>	<u>No</u>	If the Item is Approved by the Budget Department and then routed to the 1 st level approver, the 1 st level approver can edit the Item. If the error is not detected at that time, the 2 nd level Approver can edit the item.
	Routed to Budget	<u>No</u>	<u>Yes</u>	If the Item is routed to the Budget Department - waiting to be approved, the Originator can edit the Item at this time. The Originator must contact the Budget Department (<i>ASAP</i>) so that both parties are not editing the Item at the same time.
Level Approver approves the item and detects and error.	Routed to Next Level Approver	<u>Yes</u>	<u>Yes</u>	If the Item is still waiting to be approved by the next Level Approver, You can edit and make the necessary changes OR YOU CAN REJECT THE Item and the Board Item will be routed back to the originator.
Board Item is approved and Routed to the Board Publisher		<u>No</u>	<u>No</u>	Once an item is approved by all levels of approvers, you do not have the option to edit. If an error is detected at the Board Services level, you must contact Board Services ASAP to request that the item is not activated for Publishing.
Board Services approves and/or edit an Item.		<u>No</u>	<u>No</u>	Board Services will not approve and/or edit any items. If an error is noted, the approver(s) must contact Board Services to request that the item is not activated for Publishing.



What is the District's Approval Routes for processing a Board Item?

1. **APPROVAL ROUTES** – A route or Approval Tree is set up for each Department. When an Item is entered within BoardDocs, the originator will then do the following:
 - Status must be **ACTION (Consent)**
 - Select the appropriate Approval Tree for that department.
 - The **BUDGET DEPT** is notified via email that an item is submitted – Rep will then prepare and attach fiscal impact statement.
 - Approval Routes are described below:

Approval Route (Tree) Responsible Approver Approval Process

Accountability	Dr. Mary Esselman	Originator
(Research) &	(1 st level approver)	Budget Department (fiscal impact)
Assessment		Dr. Mary Esselman
		Dr. Covington
		Board Services for Publishing

Athletics	Mr. Luis Cordoba	Originator
	(2nd level approver)	Kimble Anders
		Budget Department (fiscal impact)
		Mr. Luis Cordoba
		Dr. Covington
		Board Services for Publishing

Business & Finance	Dr. Rebecca Lee Gwin	Originator
Purchasing	(1 st level approver)	Budget Department (fiscal impact)
		Dr. Rebecca Lee Gwin
		Dr. Covington
		Board Services for Publishing

Curriculum	Dr. H MiUndrae Prince	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		Dr. H. MiUndrae Prince
		Dr. Covington
		Board Services for Publishing

E-RATE	Mr. David Dude	Originator
All E-RATE related	(1 st level approver)	Budget Department (fiscal impact)
Items.		Mr. David Dude
		Dr. Covington
		Board Services for Publishing



2. **APPROVAL ROUTES** – A route or Approval Tree is set up for each Department. When an Item is entered within BoardDocs, the originator will then do the following:
- Status must be **ACTION (Consent)**
 - Select the appropriate Approval Tree for that department.
 - The **BUDGET DEPT** is notified via email that an item is submitted – Rep will then prepare and attach fiscal impact statement.
 - Approval Routes are described below:

Approval Route (Tree) Responsible Approver Approval Process

<i>Early Childhood</i>	<i>Dr. Anthony Moore</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Dr. Anthony Moore</i>
		<i>Dr. Mary Esselman</i>
		Dr. Covington
		Board Services for Publishing

<i>Facilities</i>	<i>Mr. Michael Rounds</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Mr. Michael Rounds</i>
		Dr. Covington
		Board Services for Publishing

<i>Food Service</i>	<i>Ms. Ellen Cram</i>	Originator
	(1 st level approver)	<i>Ms. Ellen Cram</i>
		Budget Department (Fiscal Impact)
		Dr. Rebecca Lee-Gwin
		Dr. Covington
		Board Services for Publishing

<i>Human Resources</i>	<i>Mr. Chace Ramey</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Mr. Chace Ramey</i>
		Dr. Covington
		Board Services for Publishing

<i>Instruction</i>	<i>Dr. Mary Esselman</i>	Originator
<i>School Leadership</i>	(1 st level approver)	Budget Department (fiscal impact)
		<i>Dr. Mary Esselman</i>
		Dr. Covington
		Board Services for Publishing



3. **APPROVAL ROUTES** – A route or Approval Tree is set up for each Department. When an Item is entered within BoardDocs, the originator will then do the following:
- Status must be **ACTION (Consent)**
 - Select the appropriate Approval Tree for that department.
 - The **BUDGET DEPT** is notified via email that an item is submitted – Rep will then prepare and attach fiscal impact statement.
 - Approval Routes are described below:

Approval Route (Tree) Responsible Approver Approval Process

<i>ITS</i>	<i>Mr. David Dude</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Mr. David Dude</i>
		Dr. Covington
		Board Services for Publishing

<i>Legal Department</i>	<i>Mr. Chace Ramey</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Mr. Chace Ramey</i>
		Dr. Covington
		Board Services for Publishing

<i>Operations</i>	<i>Mr. Jeff McDaniels</i>	Originator
<i>Pupil Services</i>	(2 nd Level Approver)	Budget Department (fiscal impact)
<i>KC Care, Truancy</i>		<i>Mr. Jeff McDaniels</i>
<i>Core Data, School</i>		Dr. Covington
<i>Based-Link</i>		Board Services for Publishing

<i>Other</i>	<i>Mr. Jeff McDaniels</i>	Originator
<i>All other depts. -</i>	(2 nd Level Approver)	Budget Department (fiscal impact)
<i>not identified above</i>		<i>Mr. Jeff McDaniels</i>
		Dr. Covington
		Board Services for Publishing

<i>Payroll</i>	<i>Dr. Rebecca Lee Gwin</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Dr. Rebecca Lee Gwin</i>
		Dr. Covington
		Board Services for Publishing

<i>Programs & Grants</i>	<i>Dr. H. MiUndrae Prince</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		<i>Dr. H. MiUndrae Prince</i>
		Dr. Covington
		Board Services for Publishing



4. **APPROVAL ROUTES** – A route or Approval Tree is set up for each Department. When an Item is entered within BoardDocs, the originator will then do the following:
- Status must be **ACTION (Consent)**
 - Select the appropriate Approval Tree for that department.
 - The **BUDGET DEPT** is notified via email that an item is submitted – Rep will then prepare and attach fiscal impact statement.
 - Approval Routes are described below:

Approval Route (Tree) Responsible Approver Approval Process

<i>Public Affairs</i>	<i>Mrs. Houston-Stewart</i>	Originator
<i>Communications</i>	(1 st level approver)	Budget Department (fiscal impact)
		<i>Mrs. Houston-Stewart</i>
		Dr. Covington
		Board Services for Publishing

<i>Purchasing</i>	<i>Mr. Cary Newsome</i>	Originator
<i>Specific Items</i>	(1 st level approver)	<i>Mr. Cary Newsome</i>
		Budget Department (fiscal impact)
		Dr. Rebecca Lee-Gwin
		Dr. Covington
		Board Services for Publishing

<i>Security</i>	<i>Mr. Michael Rounds</i>	Originator
	(1 st Level approver)	Budget Department (fiscal impact)
		Mr. Michael Rounds
		Dr. Covington
		Board Services for Publishing

<i>Transportation</i>	<i>Mr. Michael Rounds</i>	Originator
	(1 st level approver)	Budget Department (fiscal impact)
		Mr. Michael Rounds
		Dr. Covington
		Board Services for Publishing

Board Services – Items submitted from Board Services and Board Members

<i>Board Services</i>	<i>Board Services</i>	Originator
	(1 st level approver)	<i>Board Services</i>
		Budget Department (fiscal impact)
		Board Services for Publishing



Email notifications regarding my Board Items

When a user enters a Board Item within BoardDocs, the user and the approving department/staff and Board Services will receive email notification that an item is submitted and awaiting approval.

If you do not receive an email - It could be due to a number of factors. For example – connectivity to the Web is problematic, the shortcut per the user's desktop is not hyperlinked correctly, typo error with website and/or any number of reasons.

If the problem persists, please contact the **HELPDESK**.

If it is a software problem, contact IT @ extension 7119 and/or the BoardDocs Support Desk: support@emgrp.com. The Support Desk is reached via phone@ 1(800) 407-0141, option 1.

The following illustrates the types of email notification from BoardDocs.

a. Waiting Approval

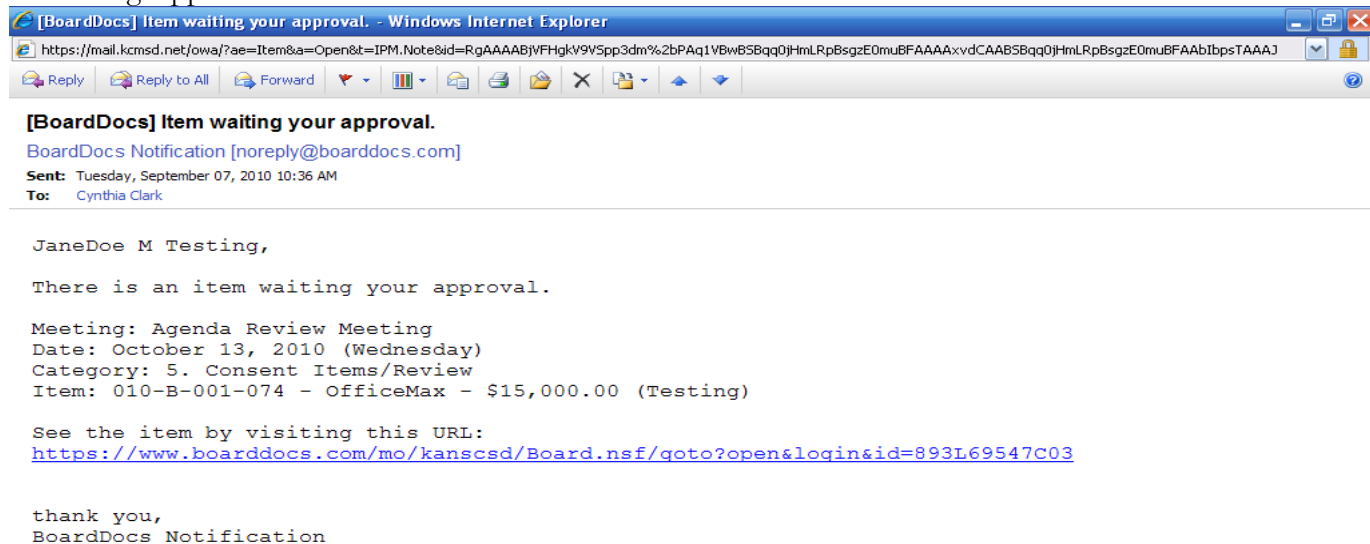


Illustration of an item waiting approval - summarizing the user name, meeting date, category, board item number, vendor name and amount



b. Item Rejected

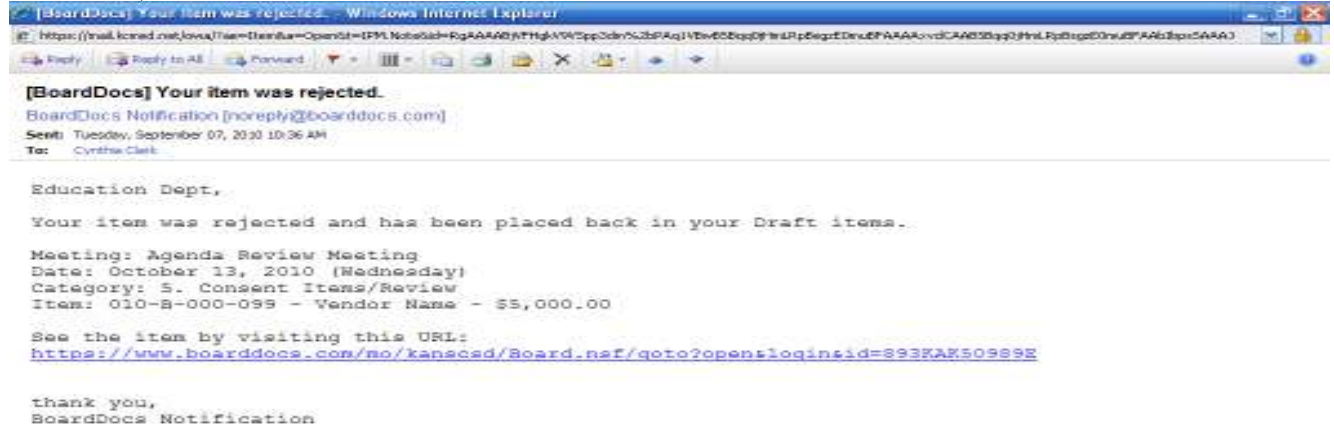


Illustration of an item rejected - summarizing the user name, meeting date, category, board item number, vendor name and amount.

***** Please keep in mind that if you do not receive an email notification, it is the Department's responsibility to assign a designated user to periodically check the Draft Agenda for their Board Items to review the status of the items. Status review could reveal – if the item is ready for their approval, if the item is waiting for Budget's approval and/or if the item is rejected and routed back to the Originator.**



Are walk-in Board Items allowed?

Walk-In Board Items are not permissible at this time. Please direct all questions and comments regarding walk-ins to the Superintendent's office.

How do I add Attachments & Other Documents

Please follow these simple directions in adding an attachment and other documents.
HINT:



All attached documents MUST be in PDF format.

BoardDocs is intended for the use of subscribers and licensed customers. All users are required to read and follow the [acceptable use policy](#).

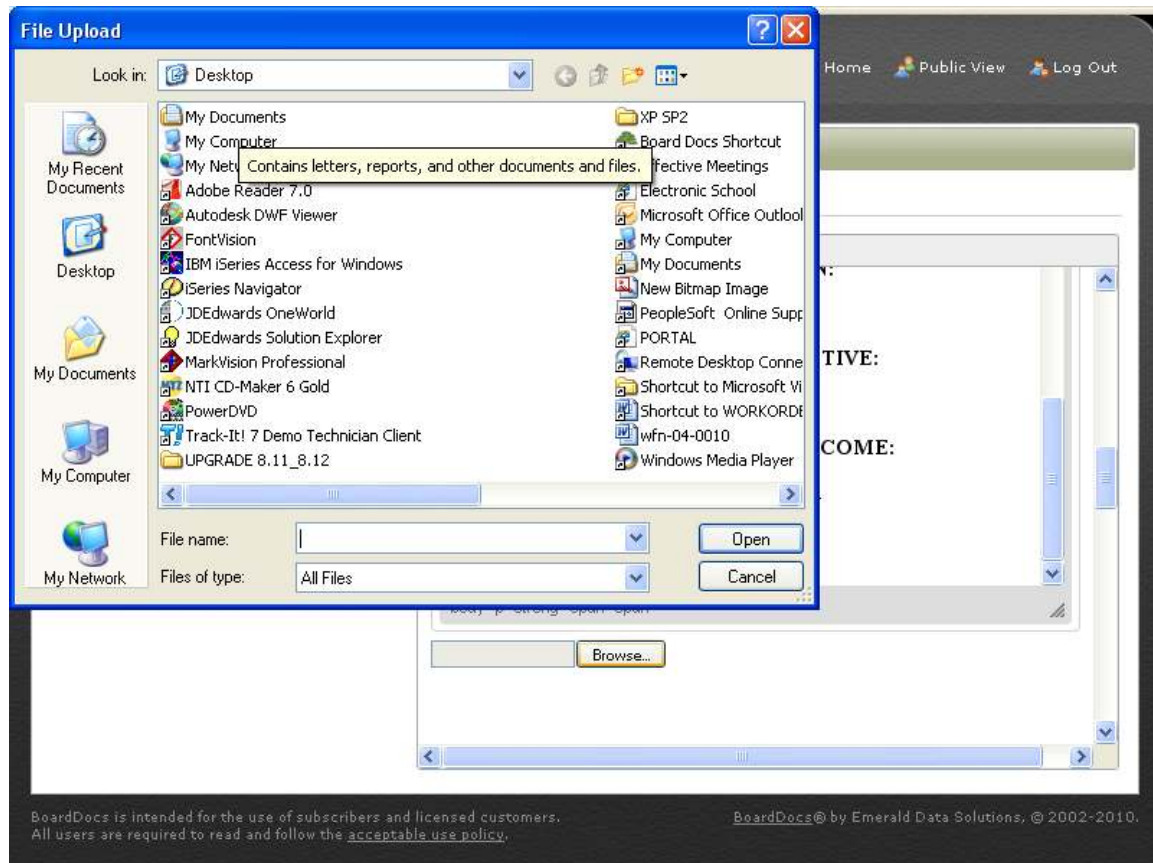
BoardDocs® by Emerald Data Solutions, © 2002-2010.

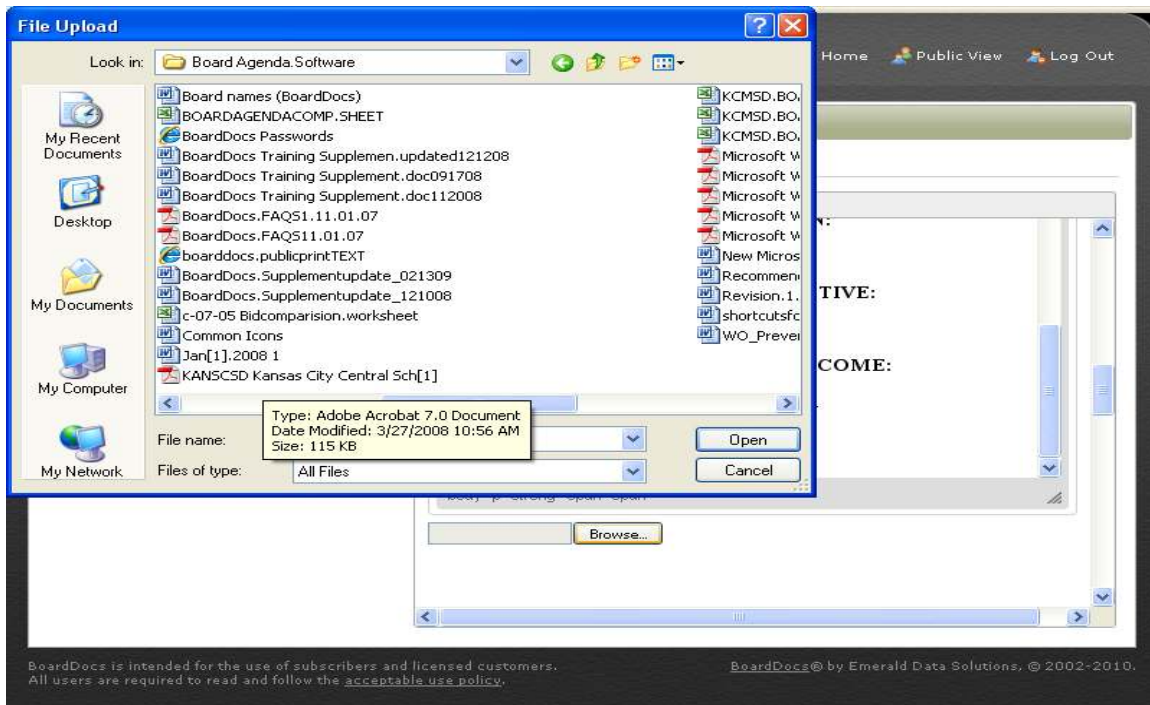
Use the same method of attaching files or documents as you would if attaching items to an email.

- Locate the file or document by clicking on **BROWSE**.
- While in **Browse**, **Scroll** to find or locate the file folder that your attachment is housed.
- **Click** on the file or document to attach.
- Upon completion – the item will then attach to your Board Item.
- You can attach more than 10 files



- All attachments must be in PDF format
- Attachment order must be in the same sequence as listed in your Board Item.
- To delete an attachment– **Right-click** on the attachment and **click DELETE**. The attachment will be deleted from your Board Item.



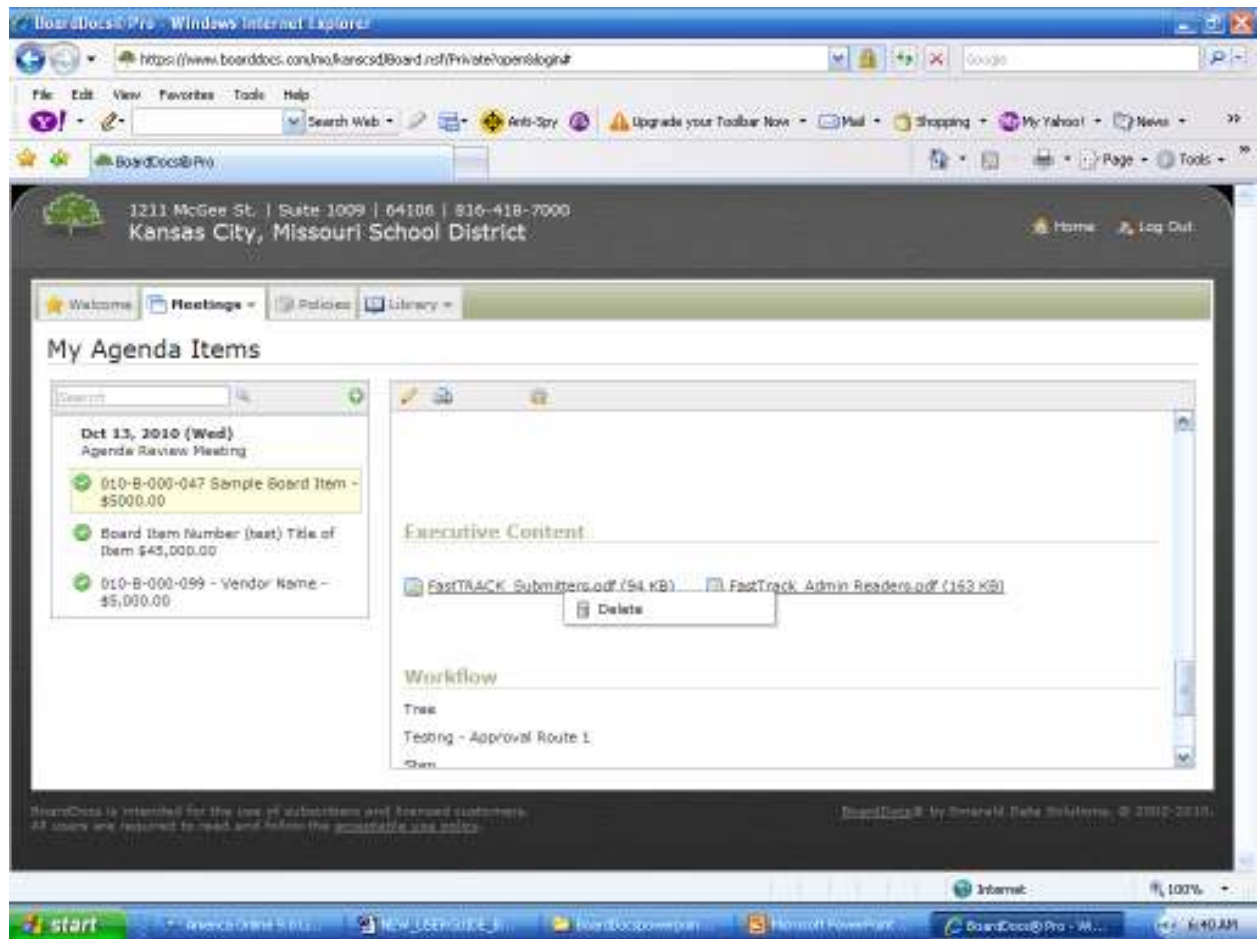


How do I delete attachments...?

If you select and attach the wrong document to your item in BoardDocs, you can easily delete the attachment and select the correct one.

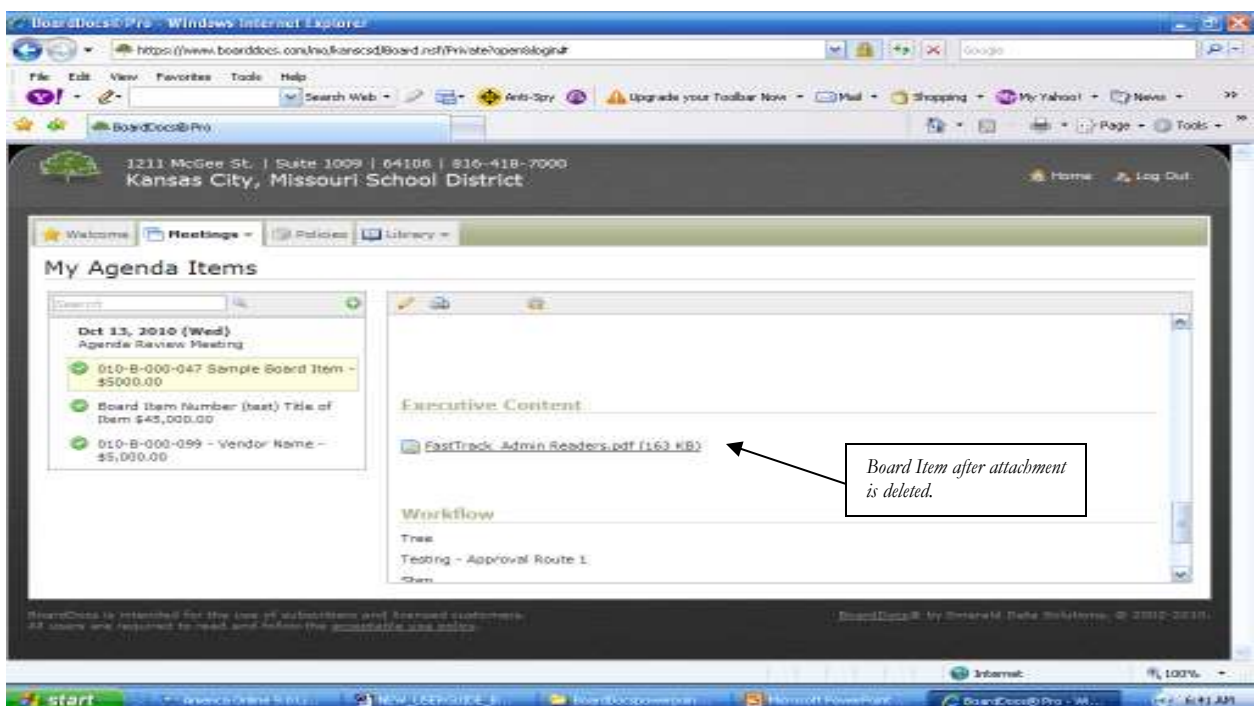
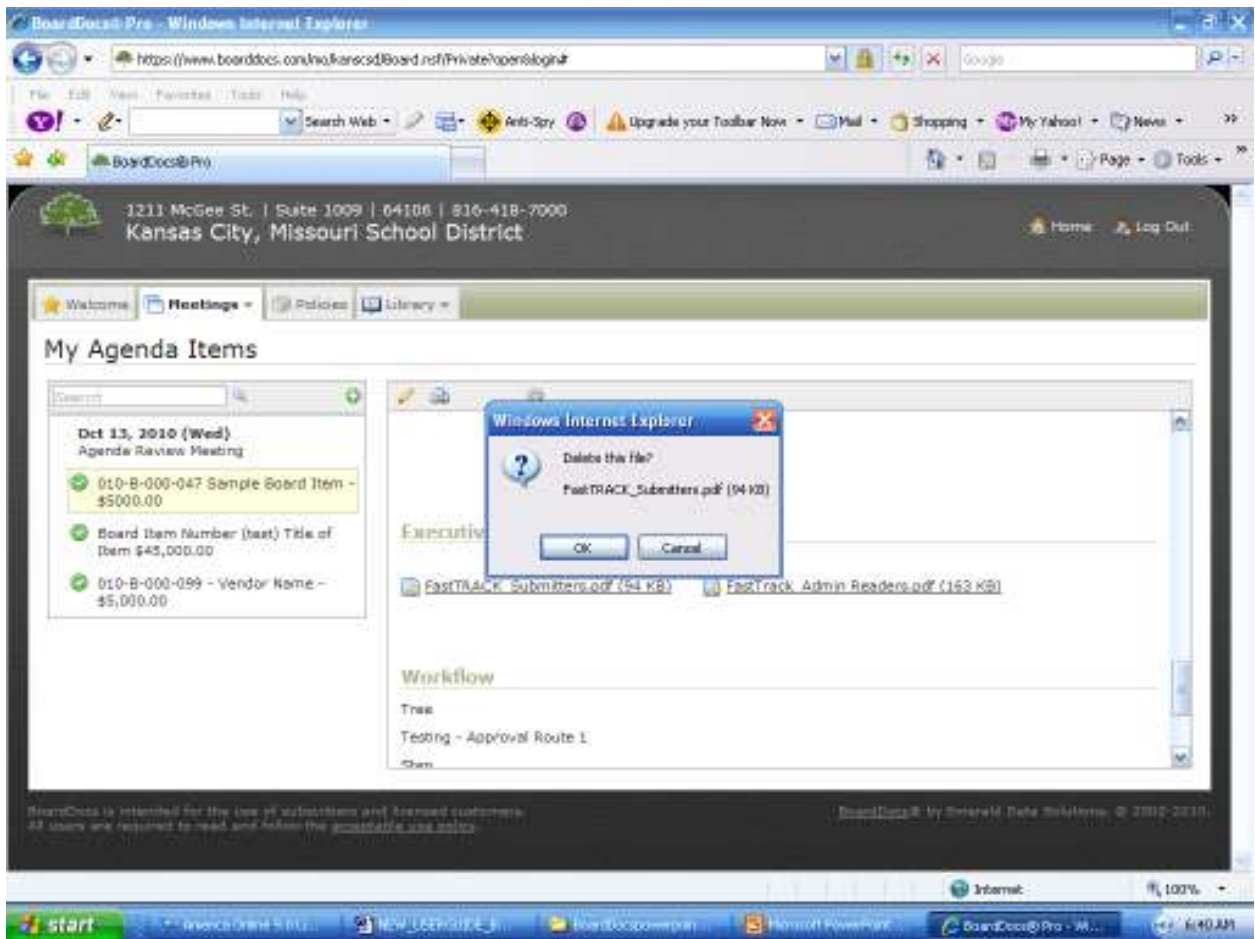
- Browse and find the attachment that is inserted on your Board Item.
- Right-click on the attachment, select Delete.





- A dialog box opens identifying the attachment – requesting confirmation of the item for deletion.
- **Select OK** to proceed with the **Delete**.
- **Upon** completion the attachment is then removed from your Board Item.



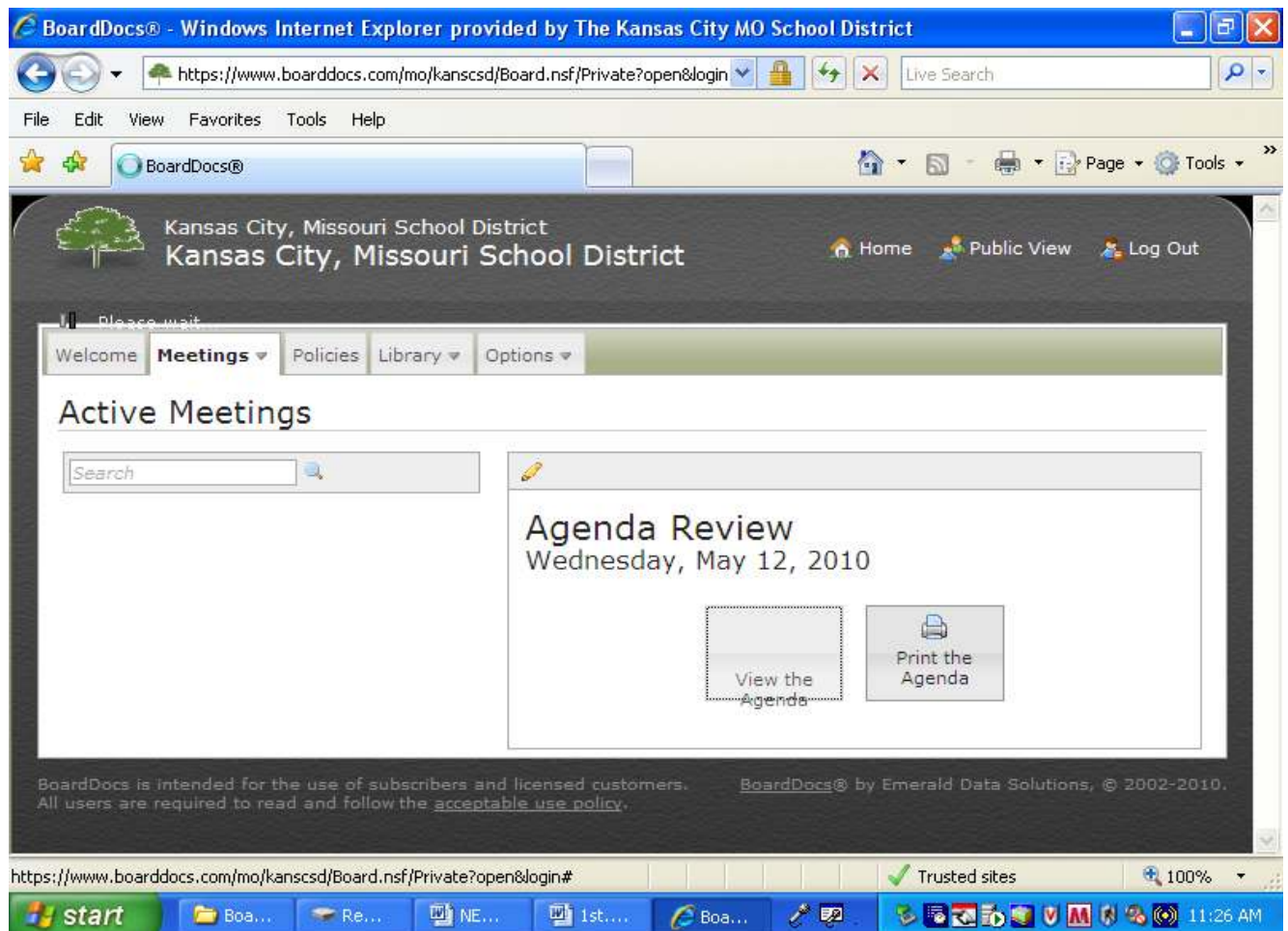


How do I print my agenda Items and attachments...?

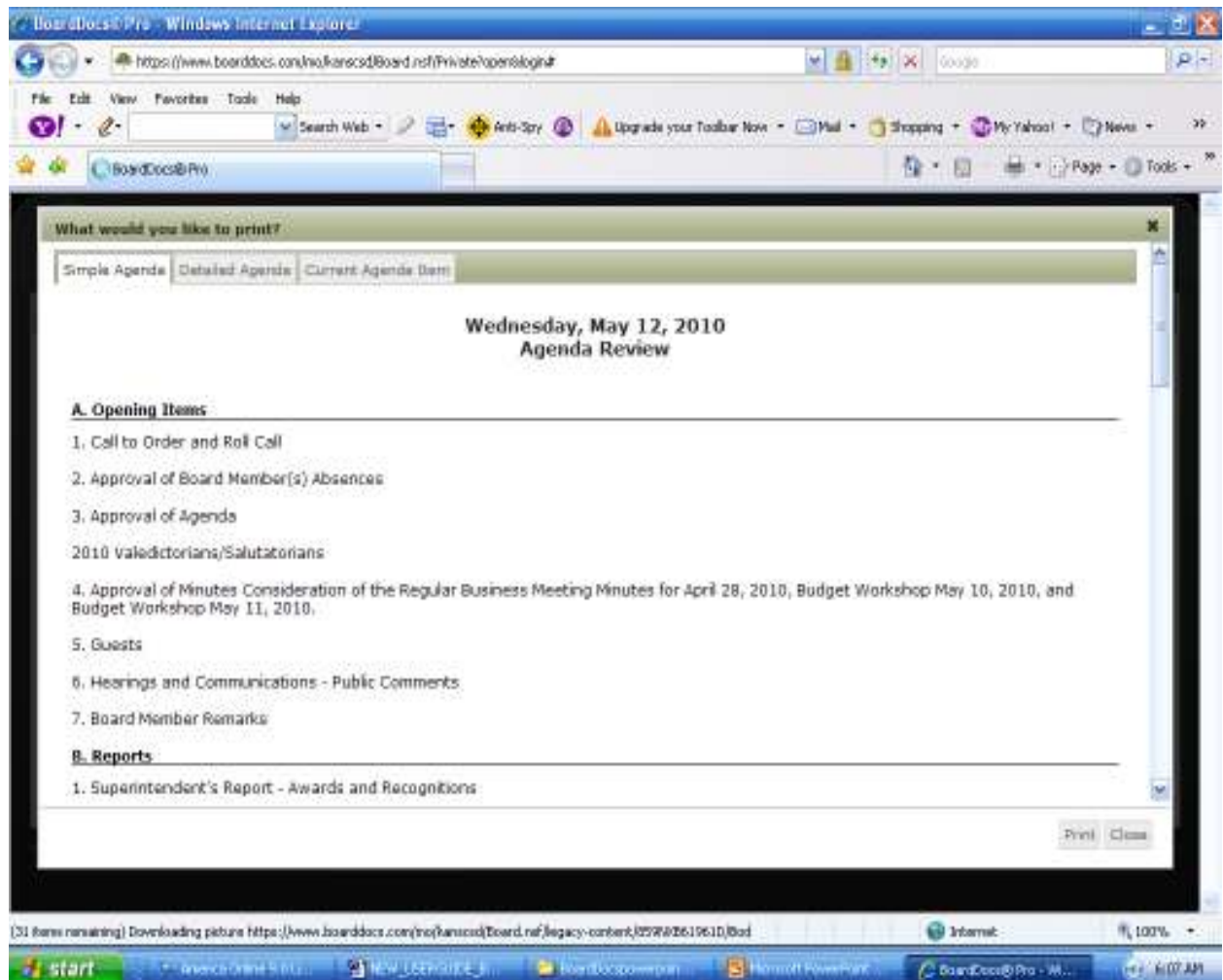
Agenda Items are printed using several methods. You do not have to log into BoardDocs to print the agenda items and/or attachments.

Public Site

- If you are accessing BoardDocs via the **Public Site** – select the tab **Meetings**, View the pull down Menu of all active Meetings, select the meeting you would like to view and/or print.

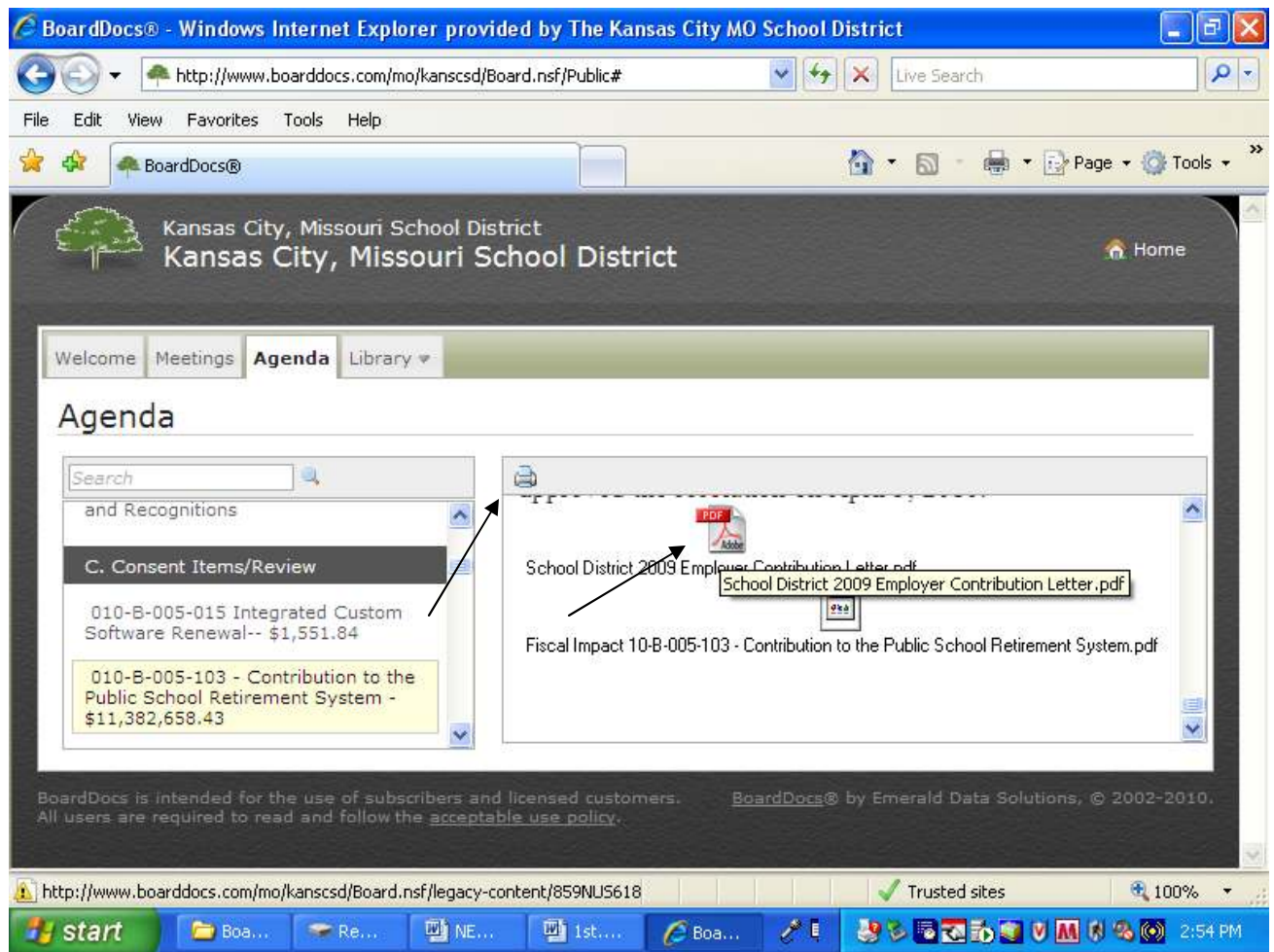


- Upon selecting *Print the AGENDA*, a dialog window will open stating - *What would you like to print?* A choice of three options will appear (simple, detailed or single item). Make your choice and proceed to print your item based on the option.



- If you need to print the attachments, find the meeting date that houses the agenda item. Open up the tree to display the Meeting header, click on the header to display the contents. Find and select the Item, double-click on the icon to open, and then proceed to print your attachment.
- Another way to print your attachment – find the Meeting dates that houses the agenda item. Click on View the Agenda, scroll down to find the Board Item, view the item and scroll to find the attachment that you would like to print. Click on the attachment, the attachment will display and you can then print your attachment.





Highlight the item and select the printer icon. The following illustrations display the varying results of the printing option.



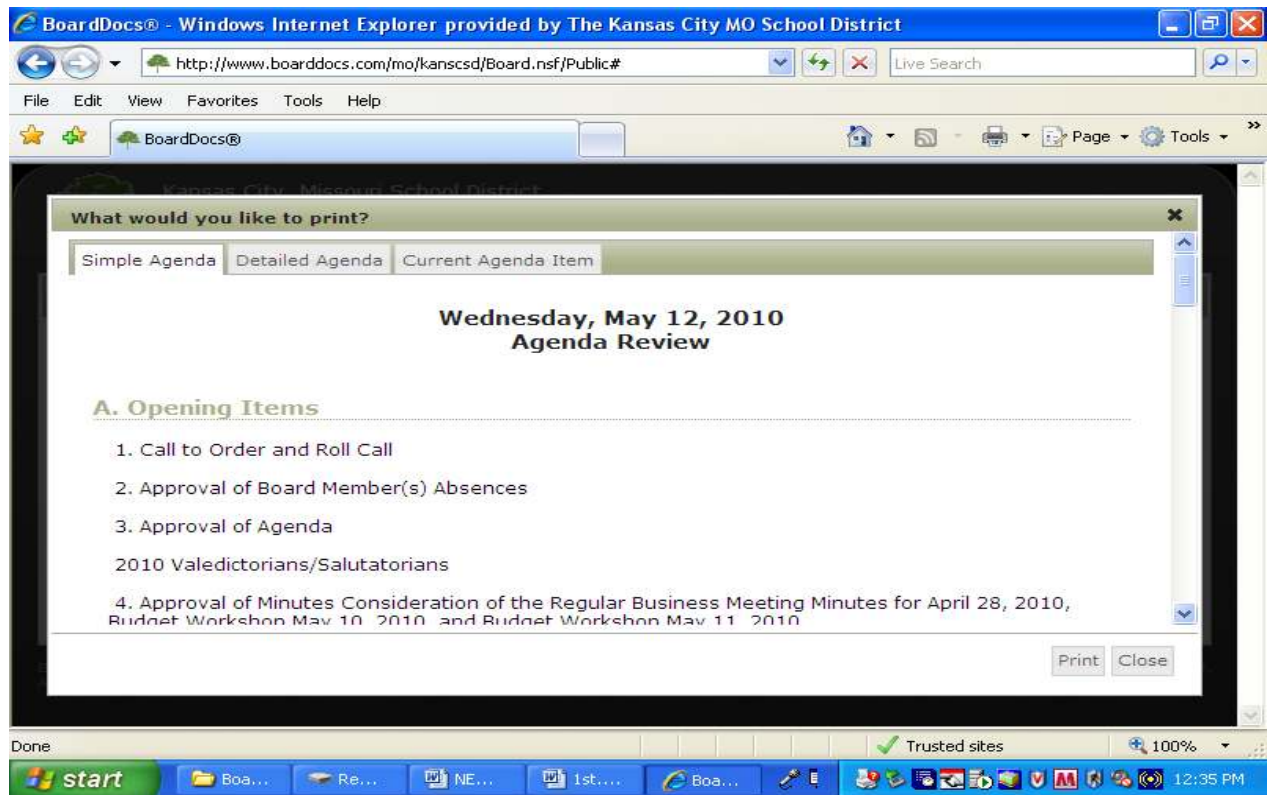


Illustration 1.1 – example of a simple agenda

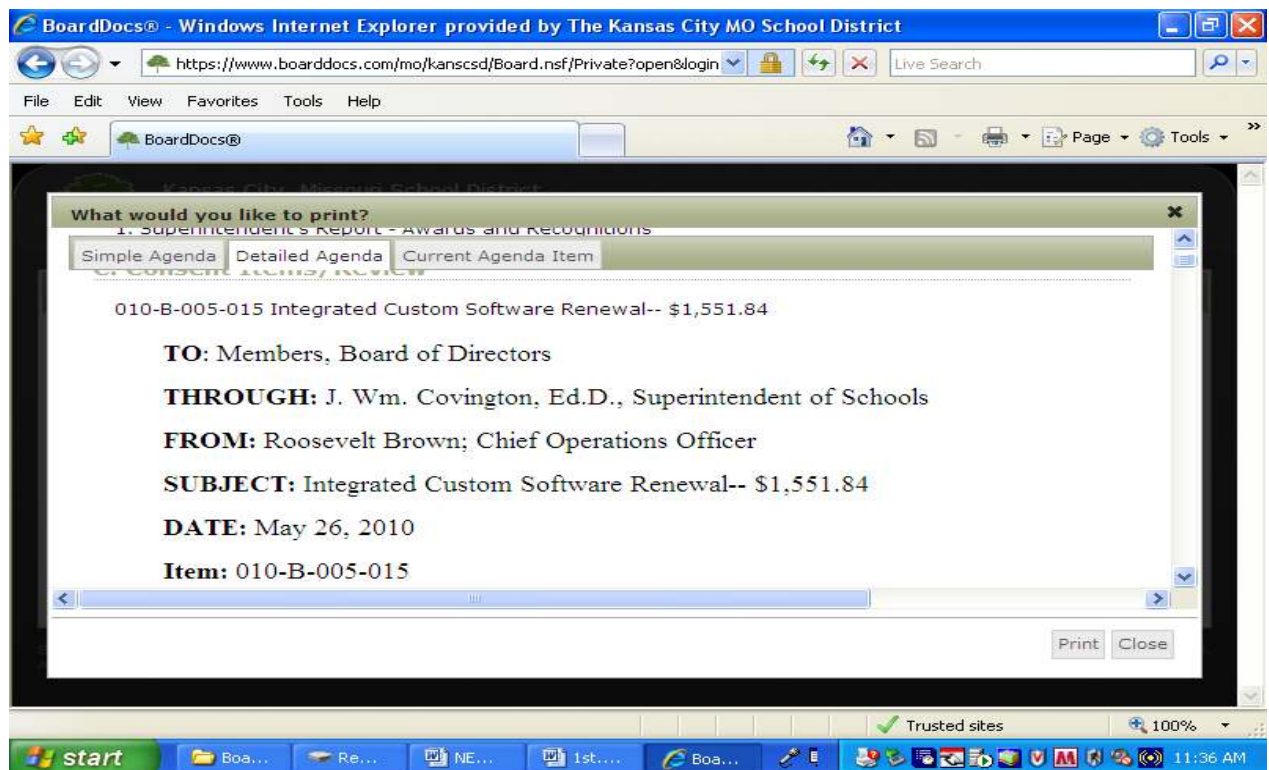


Illustration 1.2 – example of a detailed agenda



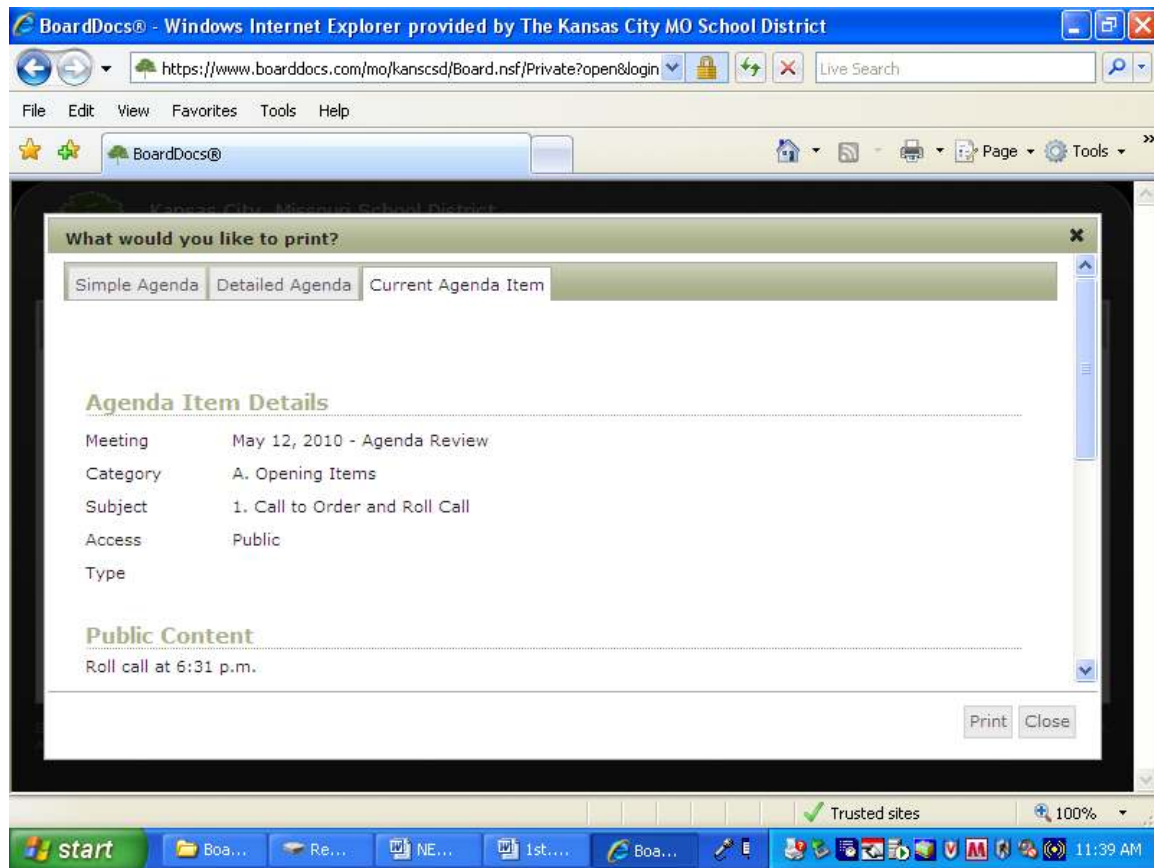


Illustration 1.3 – example of a Current agenda item

User (Authenticate) Printing

Please follow the same process of printing if accessing BoardDocs via your User ID and password.



A User ID and password is not required to print items from BoardDocs.

How can I search for a Board Item...?

There are several ways in which to search for a Board Item and/or the attachments associated with the Board Item. The search option field is available on all header tabs in BoardDocs. You can search by the following:

- Name or part of name
- Board Item number
- Date
- Attachment name or part of name



What are the typical reasons a Board ITEM is rejected...?

There are several reasons that a Board Item is rejected. It might be due to a grammatical error or misspelled word; it could be that the incorrect budget account number is recorded. It is a good idea to review your item prior to submission. The following is a broad listing of typical reasons of item rejection. Keep in mind that if your item is rejected – the workflow process will start over.

Header Rejection types

1. Incorrect DATES -
 - Preferred – traditionally the 1st Board Meeting of the month or the Approval Review Meeting
 - Absolute – traditionally the 2nd Board Meeting of the month or the Regular Business Meeting
2. Account number
 - Incorrect account number to be charged
 - Transposition error
 - Not enough funds in account number listed
3. Incorrect subject Line. The subject line is composed of three parts.
 - Board Item Number
 - Vendor Name
 - Amount – (amount should be listed even if (0) cost.
4. Incorrect meeting date chosen
5. Grammatical errors and misspelled words

TEMPLATE Rejection types

- Incorrect font (should be Times New Roman), text size (should be 12)
- Spacing
- Cut and paste from other source document rather than using the standard Template.
- Usage of bold or italic in the header
- Indenting of text that should be standard and uniform
- Naming convention of attachments
- Board Item date – date of Board Items is always the Regular Business Meeting date or the second Board Meeting of the Month.
- Missing attachments (source documents)
- Account to be charged listed in the content of your Board Item do not match your listed budget source account on the header record when entering a Board Item.
- Amount(s) listed in the content of your Board Item do not match.
- Grammatical errors and misspelled words.
- Lack of reviewing the document in non-edit mode (WYSIWYG).



- Formatting errors

Attachments

- Order/listing & naming convention of attachments in the content of your Board Item should coincide with your upload order sequence of the attachments.
- Not in PDF format

How can I obtain training for BoardDocs...?

BoardDocs training is offered on a monthly basis to all District Users, normally scheduled the 4th Thursday of each month. The times, dates and location are as follows:

- Manual Technical Center; room 311-C/ 9:00 am – 11:00 am
- 2010 Dates
 - a. January 28, February 25, March 25, April 29
 - b. May 27, June 24, July 29, August 26
 - c. September 30, October 28, November 18, December 16
- 2011 Dates
 - a. January 27, February 24, March 24, April 28
 - b. May 26, June 23, July 28, August 25
 - c. September 22, October 27, November 17, December 15 or 22nd



What is the Board Item Checklist?

Please use this handy checklist as a helpful reminder prior to final processing of your Board Item.

- ☐ **Are all attachments saved in a PDF format?** Please remember to format your attached documents into an adobe acrobat format. This will prevent anyone changing the attachment. Attachments that are not secured in a PDF format are subject to modifications by anyone accessing the system or your document. If you do not have the full adobe – please use the free software primo PDF®.
- ☐ **Reviewed and checked for misspelled words, grammatical errors and other formatting issues?** Please peruse your document and check for grammatical errors and misspelled words prior to transferring over to BoardDocs. If you are using Microsoft Word - please ensure that your spell check is on. BoardDocs do not have spell check capability; therefore it will transfer over as **WYSIWYG** (what you see is what you get), all misspelled words, incorrect font size, and/or any other oddities.
- ☐ **Preview the document in the non-edit Mode.** While in BoardDocs; please view in the non-EDIT mode. By doing so - you are viewing the document how it will be presented on the agenda.
- ☐ **Check the District's Board Item Template.** If you are using the District's Board Item template - please keep in mind that the template has pre-set values (headings, font size, bold, left/right or center justification, and etcetera.) This can cause problems if you are trying to edit your document in BoardDocs.
- ☐ **Edit the document prior to Budget Approval as needed.** A document can be edited prior to the Budget Department approving it. For example: If you have submitted your Board Item and you selected Action(consent), and the Item is still waiting to be approved by the Budget Department - you still have an opportunity to edit. Once the Budget Department has approved your Board Item and you still detect an error - only the 1st level approver for your Division can edit the Board Item prior to final approval by Board Services.
- ☐ **Is the Dollar amount added to the subject line in the header?** Remember to add the dollar amount of your Board Item on the subject line in the header of the item. The subject line consists of 3 parts:

Board Item NO#	Title	Dollar Amount.
08- I-2000-001	Vendor Name	\$25,000.00

