ENTERING AGENDA ITEMS IN AGENDA.NET

Access using the Agenda.Net desktop icon.

MAIN SCREEN

1. Click "Agenda Items" under Agenda Management. Hint: To search for items, enter the % symbol followed by your search criteria in the applicable field (see example below for meeting date search of 11/16/2020).

2. Click the Green Button ⊕ to open the new agenda Item creation window.

Type	Number	Created	Creator	Subject	Enabled	Sealed	Public	Status	Search	Attachm
Agenda	35/2021	1/28/202	Debra Weary	Minutes - 11/16/2020	☑	☐	☑	On Ager	☑	2
Agenda	291/2020	11/12/20	Steve McNally	Contingency Summary - 11/16/2020	☑	☐	☑	On Ager	☑	1
Agenda	290/2020	11/12/20	Korena Weichel	Open Broadband Tower Agreement for Oak Hill Tower - 11/16/2020	☑	☐	☑	On Ager	☑	2
Agenda	289/2020	11/11/20	Michael Felts	Potential Refunding of Series 2010A RZEDBs - 11/16/2020	☑	☐	☑	On Ager	☑	1
Agenda	288/2020	11/11/20	Michael Felts	Proposed Lease of Office Space - 11/16/2020	☑	☐	☑	On Ager	☑	3
Agenda	287/2020	11/11/20	Michael Felts	Pay and Classification Study Presentation - 11/16/2020	☑	☐	☑	On Ager	☑	0
Agenda	286/2020	11/11/20	Michael Felts	Surplus Property Request - 11/16/2020	☑	☐	☑	On Ager	☑	0
Agenda	285/2020	11/10/20	Debra Weary	Closed Session as allowed by G.S. 143-318.11(a)(5) - Property Acquisition -	☑	☐	☑	On Ager	☑	0
Agenda	284/2020	11/10/20	Debra Weary	Closed Session as allowed by G.S. 143-318.11(a)(3) - Attorney-Client Matte	☑	☐	☑	On Ager	☑	0
Agenda	283/2020	11/10/20	Lynn Cooper	Resolution for Granville County Application for CDBG Grant Funding - 11/1	☑	☐	☑	On Ager	☑	1
Agenda	282/2020	11/9/202	Korena Weichel	GAP Entrance Signage - 11/16/2020	☑	☐	☑	On Ager	☑	4
Agenda	281/2020	11/9/202	Debra Weary	Contracting of Services for Litter Removal - 11/16/2020	☑	☐	☑	On Ager	☑	0
Agenda	280/2020	11/9/202	Debra Weary	Solid Waste Engineering Firm Selection - 11/16/2020	☑	☐	☑	On Ager	☑	1

AGENDA ITEM TAB

1. A new window opens after clicking the Green Button. Information fields automatically completed by the software will be greyed out. Mandatory fields will have a red border.

   a. <u>Agenda Item Type</u>: Select "Agenda Item".

   b. <u>Subject</u>: Enter topic followed by a dash (-) and the meeting date formatted as mm/dd/yyyy without leading zeros (i.e., 10/3/2022 <u>not</u> 10/03/2022).

   c. <u>Description</u>: Copy the topic name from the subject field (without the date). This topic name will appear on the final agenda.

   d. <u>Initiator</u>: Select "staff" from the drop down list.

   e. <u>Department</u>: Select appropriate department from the drop down list.

   f. In the bottom right part of this screen, there are five check boxes. Enter a checkmark for "Published" and "Search Enabled".

MEETING INFORMATION

1. Click on the "Meetings" tab.
2. Select Organization (i.e., Board of Commissioners).
3. Select the meeting date for the item (same as you entered in the subject line in step #3(d).
4. Choose the applicable topic category. This will dictate what heading the item will appear under on the final agenda.
5. Checkmark "Public"

ATTACHMENTS

1. Click on the "Attachments" tab.
2. Click the Green Button ⊕ to add a new attachment.

3. Fields will pop-up on your Agenda Item attachments screen.

    (a) File: Select the desired attachment from your computer.

    (b) Comment: Enter description of the attached file. This is the file name as it will appear on the final agenda report.

    (c) Click "OK" to close the pop-up.

4. Use the Green Arrows ⬆ ⬇ to organize the attachments according to the order in which you want them to appear on the final agenda.

SECURITY

1. Click on the "Security" tab.
2. Select your department's security template from the drop-down list.
3. Click "Apply"
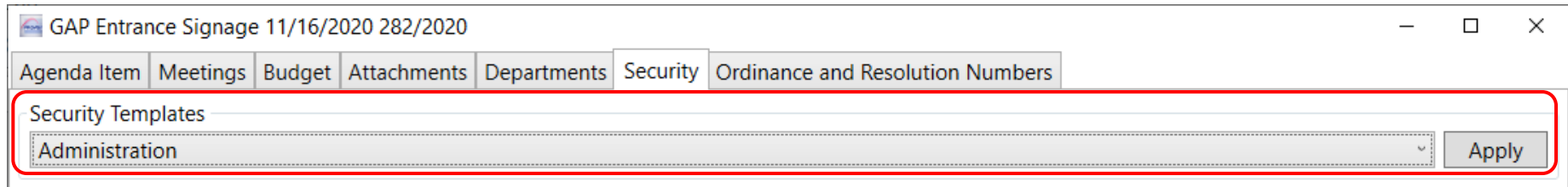
SAVE

At any point as you enter information and upload attachments, all information can be saved by clicking the **Save** button in the lower right hand corner of the Agenda Item. **All information and/or changes will be disregarded by clicking the Cancel button.**
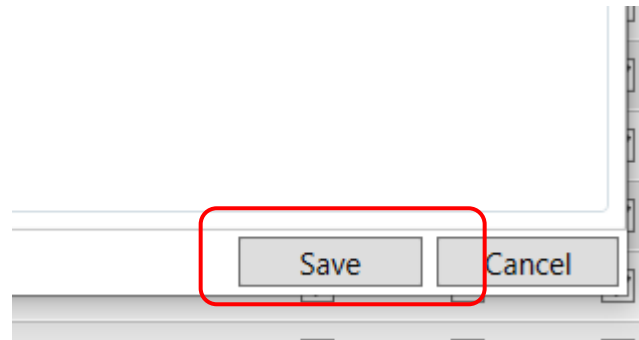
Clicking the "Save" button will take you back to the Home Screen with the list of agenda items you have permission to view or edit.

To continue editing and adding the recommendation and background documents, open your agenda item with a double mouse click.

CREATING THE AGENDA ITEM DOCUMENT

In the bottom portion of the home screen, there are three document types listed. Click on the document button in the order listed below to open the template in Microsoft Word.
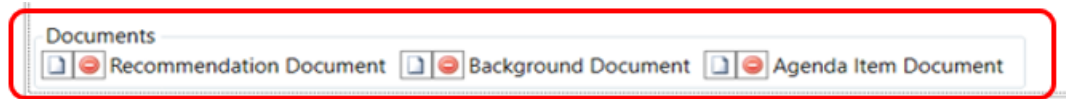

1. Recommendation Document
- Merges later into Agenda Item Document.
- Use one sentence and begin with your department title. For example, "Solid Waste Management Director recommends . . ."
- If no recommendation, enter "N/A", "Discussion Item Only", or other appropriate wording.
- Click "save" in Word before closing the document.

2. Background Document
- Merges later into Agenda Item Document.
- Enter a one-sentence summary statement for the purpose of the agenda item, supporting details for the background (strive to be concise and simple yet provide enough background and related information to enable the Board to make an informed decision), compliance with purchasing policy, and funding information. If you know what budget account the item will be paid from, please list it. If it is from a grant or other source that you do not know the number and cannot determine it, please state grant or other funding source and add an explanation.
- Click "save" in Word before closing the document.

3. Agenda Item Document
- This is the final document and pulls information directly from the recommendation and background documents.
- Select the applicable type from the drop down list: Agenda Item, Emergency Management Template or Sheriff's Office Template.
- Note: Once you have created the Agenda Item Document, any changes you make to the background or recommendation documents will not update to the Agenda Item Document, you will need to delete the Agenda Item Document and rebuild it.
- Reformat as needed to make the document easy to read and concise. One-page is preferred if information will fit.
- Click "save" in Word before closing the document.

h. After you have completed the required fields to create a new agenda item, click the SAVE button in the bottom right-hand corner.
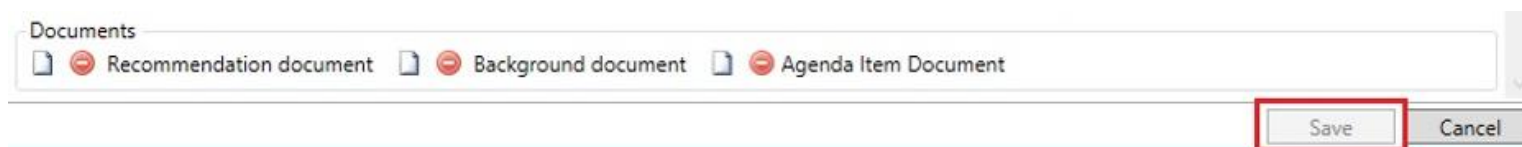
You are now back at the Home Screen with the list of agenda items you have permission to view or edit.