Step-by-Step Tutorial: Diligent Community Meeting Management

Participatory Governance and Meeting Group Scribes

Creating Meeting Agendas

1. **Create a New Meeting**
    - Go to **Current Meetings** or **All Meetings**.
    - Click **+ Meeting**.
    - On the *Create Meeting* page, fill in:
        - **Meeting template** (select from dropdown)
        - **Name** (default is template name, but you can customize)
        - **Date & Time** (select date, start time, duration)
        - **Location** (enter zoom, room and/or locations)
        - **Public Site toggle** (Show meeting on the public site)
    - Click **Create Meeting**
2. **Build the Agenda**
    - Open the created meeting and select **Agenda Builder**.
    - Add/adjust **sections as needed** (e.g., Call to Order, Public Comment, Consent Items)
    - Within each section, you can add:
        - **Subheadings**
        - **Agenda Items**
        - **Recommended Actions** (used for motions/votes)
        - **Descriptions** (brief explanatory text)
3. **Organize the Agenda**
    - Use **+Section**, **+Item**, or **Add Subheading** as needed.
    - Reorder using drag-and-drop or the **Move Up/Down** options.

- Delete or duplicate items as needed.

4. **Attach Supporting Documents**
   - Select an agenda item → Click the **attachment icon** → Upload file → Click ✅ check mark.
   - Links to attachments will display in the agenda.
5. **Add Links or Tables**
   - Select text → click the **link icon** to add a URL.
   - For tables → click **Add Description**, then the **table icon**.
6. **Preview the Draft Agenda**
   - Go to the meeting's details page → Agenda section → Options → Preview Draft.
   - Choose **Public Agenda** and view in Web, PDF, or Word format.
7. **Share & Publish**
   - Optional: share with group members/admins for review.
   - Once finalized, click **Publish Agenda** to make it public.

Taking Roll Call

1. **Start a Live Meeting**
   - Go to the agenda → Click **Live Meeting**.
2. **Open Roll Call Panel**
   - At the top, click **Roll Call**.
   - A list of voting members appears.
3. **Mark Attendance**
   - Select **Present** or **Absent** for each member.
   - If a member is late, mark **Late**.
   - If quorum is not achieved, a **Quorum Lost** notification appears.
4. **Record Guests or Non-Voting Attendees**
   - Add them manually in your meeting notes for later inclusion in the minutes.

5. **Close Roll Call Panel**
   - Click **Close** in the top right corner.
   - Edits auto save

C**reating Meeting Minutes**

1. **Insert Roll Call into Minutes**
   - In the Live Meeting, select the agenda item where you want the roll call listed.
   - Click **Add Description** → **Roll Call icon** → Placeholder text appears.
2. **Add Notes During Meeting**
   - As you progress through the agenda, add key notes under each item.
3. **End Live Meeting**
   - After the meeting, stop the live session.
4. **Edit Minutes**
   - Go to the meeting details → **Minutes** → Click **Edit**.
   - Review notes, add any final details.
5. **Preview Draft Minutes**
   - In **Minutes**, click the **Options** icon → Preview Draft → Select **Member Minutes**.
   - Check roll call and notes placement.

Adding Meeting Minutes to Agendas for Approval

1. **Attach Previous Minutes as Agenda Item**
   - In a **future meeting agenda**, add a section (e.g., *Approval of Previous Minutes*).
   - Select **+Item** → Add an agenda item titled *Approval of [Date] Minutes*.
2. **Attach the Minutes Document**

- Click the agenda item → **Attachment icon** → Upload finalized minutes → ✅.

3. **Publish Agenda**
   - After review, publish the agenda with attached minutes for approval at the next meeting.
4. **Record Approval**
   - In the next meeting, under the minutes approval item, record the motion, second, and vote outcome.

Quick Process Flow

1. Create Meeting → Build Agenda → Add Docs → Share & Publish
2. Start Live Meeting → Take Roll Call → Add Notes
3. Stop Live Meeting → Edit & Finalize Minutes → Preview Draft
4. Attach Minutes to Next Meeting Agenda → Approve