

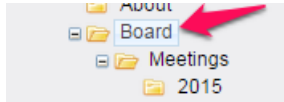
# Ektron Website Quick Reference

## Using the Meetings & Agendas Smart Form

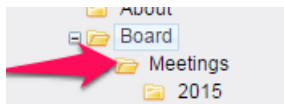
### Overview

Whenever creating a meeting section, be sure to create

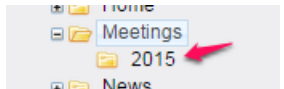
1. Create a folder for the Board, Council or Commission



2. Create a Meetings Folder nested inside the Board/Council/Commission folder containing a single page – program smartform with a link to the content in each meeting year folder.

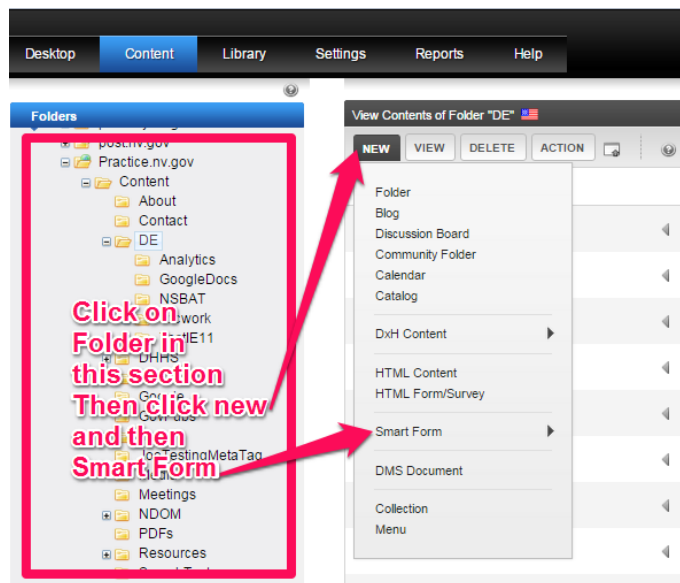


3. Meeting Year folder – example: 2015. It will contain one content Meetings & Agendas smartform.

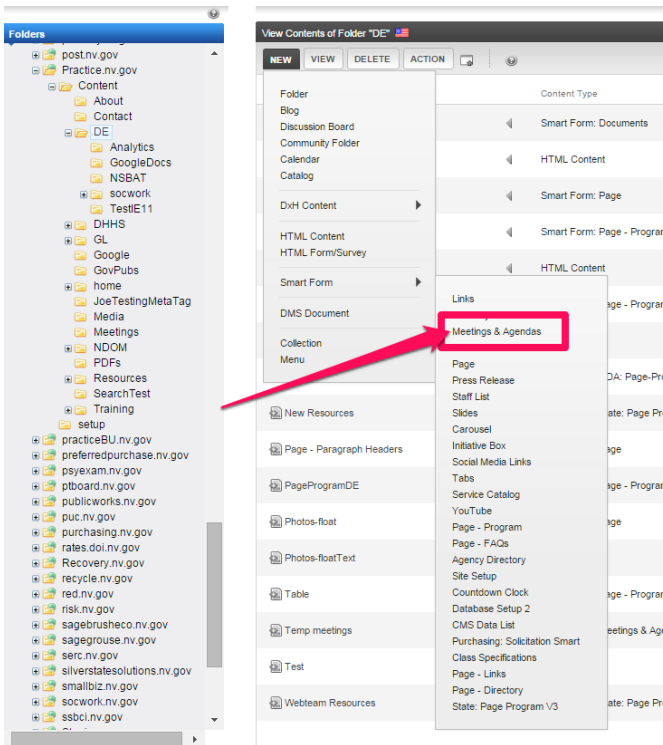


### Creating a New Meetings & Agendas Smart Form

In the Workarea click on the folder you want to add the Meetings & Agendas smartform to.



**Choose Meetings & Agendas from the drop-down menu.**



**Enter the content block Title. Remember this will also become part of the url that will be displayed in the browser. If you change this name you will break every link to the page within the site.**

**Enter the Page Title. This is the title that will be displayed on the page. You can change this without breaking links on the site.**

Content Item Folder DE

PUBLISH

Title:

Content Searchable

Content Summary Metadata Aliases Schedule Comment Templates

Page Title (optional):

Page Copy (optional, general copy above the meeting and agendas area):

Page Style: Home Style: Display Title (Home): Document Home URL:

Style 1 Style 1

Meeting Meeting Status: Active

Date: Time (HH:MM AM/PM): Meeting Title or Brief Description (shown at top): Notes (shown at footer):

08:00 AM

Location Type: Address: Room: City: Link

Physical Location

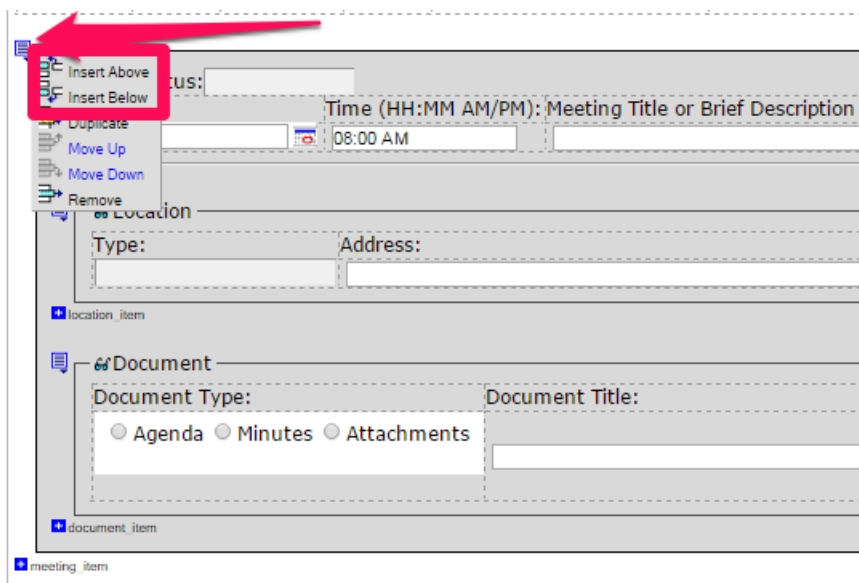
Document Document Type: Document Title: File File Type:

Agenda Minutes Attachments PDF

meeting\_item

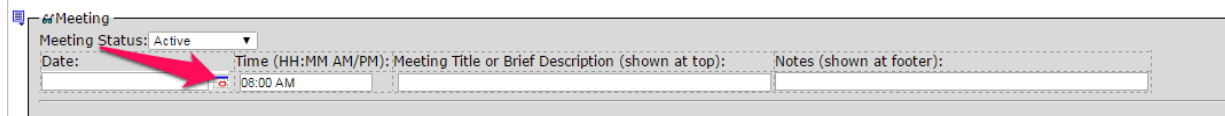
## Adding Meeting Blocks

To add a meeting block click the *meeting item* icon and choose *Insert Above* or *Insert Below*.



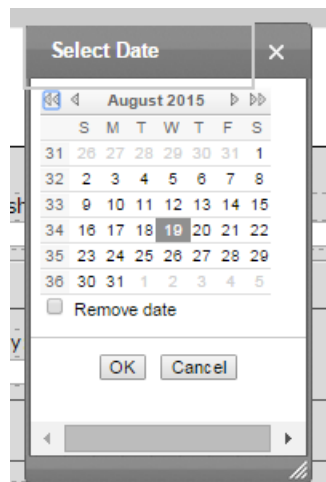
A screenshot of the SmartForm interface. A red box highlights the 'meeting item' icon in the top left corner. A red arrow points from this icon to a dropdown menu that is open, showing options: 'Insert Above', 'Insert Below', 'Duplicate', 'Move Up', 'Move Down', and 'Remove'. Below the menu, the form fields for a meeting item are visible, including 'Topic:', 'Time (HH:MM AM/PM):', 'Meeting Title or Brief Description', 'Location', 'Type:', 'Address:', 'Document Type:' (with radio buttons for 'Agenda', 'Minutes', and 'Attachments'), and 'Document Title:'.

Click the calendar button to enter the meeting date.



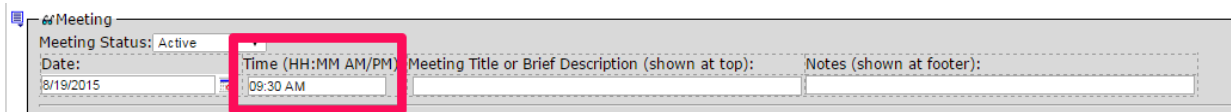
A screenshot of the 'Meeting' form. The 'Meeting Status' is set to 'Active'. The 'Date:' field has a calendar icon to its right, which is highlighted by a red arrow. The 'Time (HH:MM AM/PM):' field is set to '08:00 AM'. The 'Meeting Title or Brief Description (shown at top):' and 'Notes (shown at footer):' fields are empty.

Scroll through the months/years and click on the appropriate date then click OK.



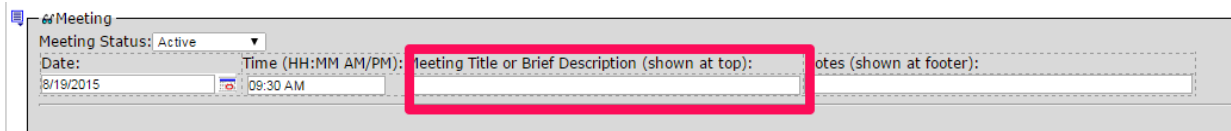
A screenshot of the 'Select Date' dialog box. The calendar shows the month of August 2015. The date '19' is selected. The dialog has 'OK' and 'Cancel' buttons at the bottom.

**Enter a new meeting time if the default of 08:00 AM is not correct.**



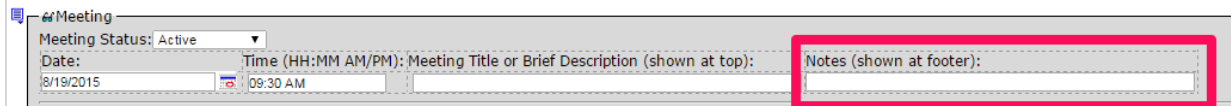
A screenshot of a meeting form. The 'Time (HH:MM AM/PM)' field is highlighted with a red box and contains the value '09:30 AM'. Other fields include 'Meeting Status: Active', 'Date: 8/19/2015', 'Meeting Title or Brief Description (shown at top):', and 'Notes (shown at footer):'.

**Enter the meeting title.**



A screenshot of a meeting form. The 'Meeting Title or Brief Description (shown at top):' field is highlighted with a red box. Other fields include 'Meeting Status: Active', 'Date: 8/19/2015', 'Time (HH:MM AM/PM): 09:30 AM', and 'Notes (shown at footer):'.

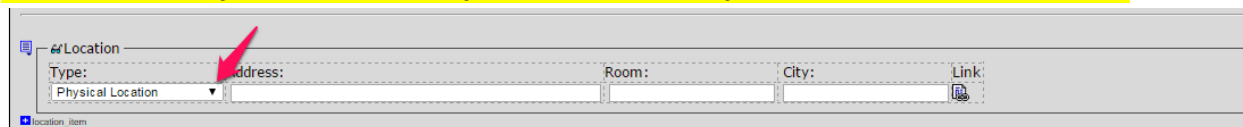
**Enter any notes about the meeting. Typically this is used to note "agenda to follow" when posting meeting notice and is removed when agenda is posted.**



A screenshot of a meeting form. The 'Notes (shown at footer):' field is highlighted with a red box. Other fields include 'Meeting Status: Active', 'Date: 8/19/2015', 'Time (HH:MM AM/PM): 09:30 AM', and 'Meeting Title or Brief Description (shown at top):'.

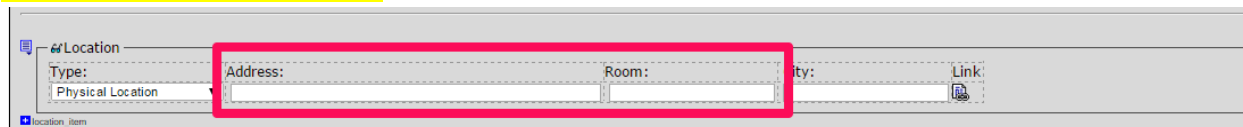
**Enter location information.**

**Click the drop-down next to physical location and choose the type of meeting. Options include: physical location, videoconference site, teleconference site, view conference online, do not show icon.**



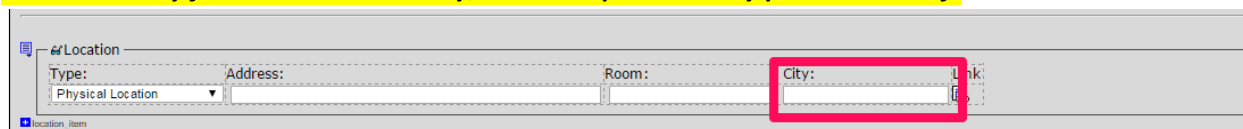
A screenshot of a location form. The 'Type:' dropdown menu is highlighted with a red box and shows 'Physical Location'. A red arrow points to the dropdown arrow. Other fields include 'Address:', 'Room:', 'City:', and 'Link:'.

**Click in the address field and type the address to the meeting location. Note: When used the Room field displays in front of the address.**



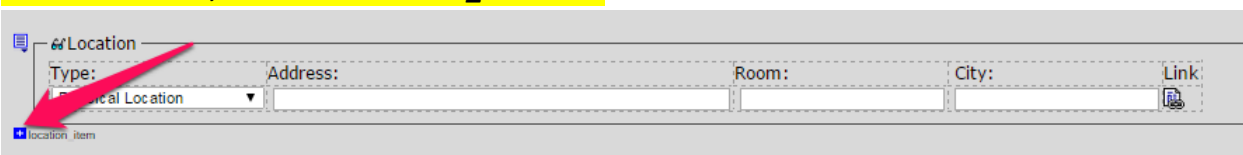
A screenshot of a location form. The 'Address:' field is highlighted with a red box. Other fields include 'Type: Physical Location', 'Room:', 'City:', and 'Link:'.

**Click in the City field and enter the City, State & Zipcode or any portion thereof.**



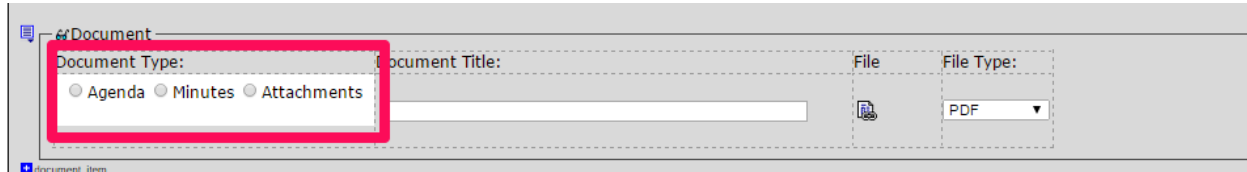
A screenshot of a location form. The 'City:' field is highlighted with a red box. Other fields include 'Type: Physical Location', 'Address:', 'Room:', and 'Link:'.

**To add a location, click on the location\_item icon.**



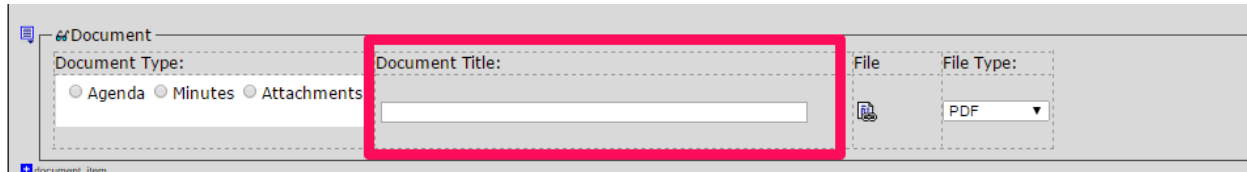
A screenshot of a location form. The 'location\_item' icon at the bottom left is highlighted with a red box and a red arrow. Other fields include 'Type: Physical Location', 'Address:', 'Room:', 'City:', and 'Link:'.

To add a document, select the document type. **Note: If you do not click one of the type buttons you will not be able to see the document on the staging website.**



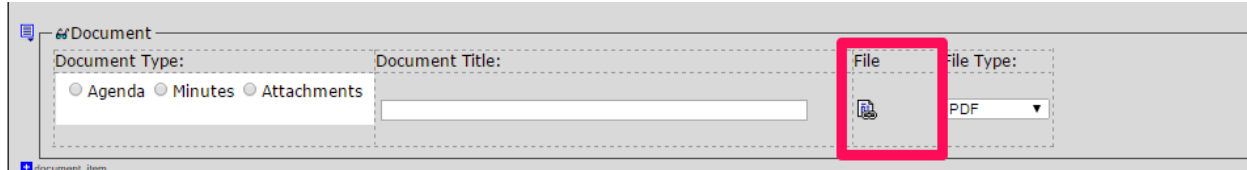
A screenshot of a web form titled "Document". It contains a "Document Type:" section with three radio buttons: "Agenda", "Minutes", and "Attachments". The "Agenda" button is highlighted with a red box. To the right is a "Document Title:" text input field. Further right are "File" and "File Type:" sections. The "File" section has a document icon, and the "File Type:" section has a dropdown menu currently set to "PDF".

Enter the document title. Keep this short as it will appear on the page when you hover over the document icon



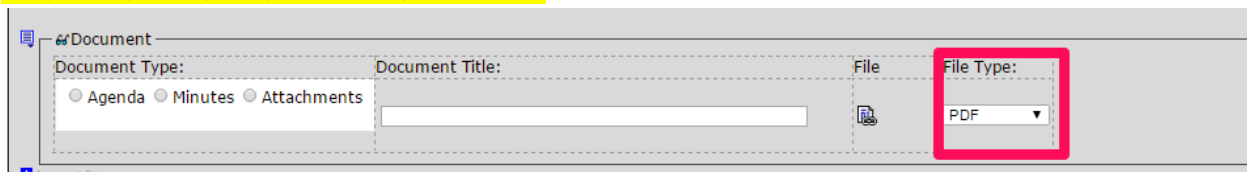
A screenshot of the "Document" form. The "Document Title:" text input field is highlighted with a red box. The "Document Type:" section shows "Agenda" selected. The "File" and "File Type:" sections are visible on the right.

Upload the document or link to the document using the URL button. See separate procedures for [Uploading Directly to the Smart Form on the Fly](#) and [Uploading to the Library Prior to Updating the Smart Form](#).



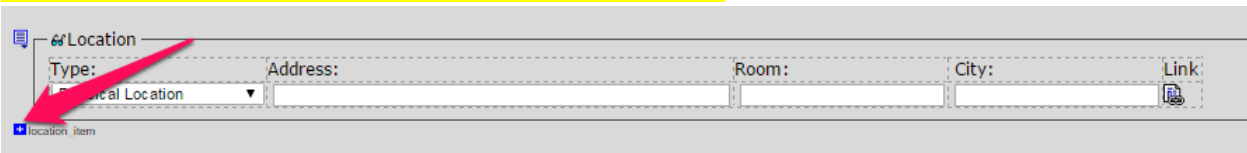
A screenshot of the "Document" form. The "File" button, which has a document icon, is highlighted with a red box. The "Document Title:" field is empty. The "Document Type:" section shows "Agenda" selected. The "File Type:" dropdown is set to "PDF".

Choose the file type by clicking the drop-down menu and choosing from the options available which include: PDF, Word, Excel, Link, Audio File, Video File.



A screenshot of the "Document" form. The "File Type:" dropdown menu is highlighted with a red box. The dropdown is currently set to "PDF". The "Document Title:" field is empty. The "Document Type:" section shows "Agenda" selected. The "File" button is visible on the left.

To add a document block, click on the *document\_item* icon.



A screenshot of a web form titled "Location". It contains a "Type:" dropdown menu with "Physical Location" selected. To the right are "Address:", "Room:", and "City:" text input fields. A "Link" button with a document icon is on the far right. A red arrow points to a small blue icon labeled "document\_item" in the bottom left corner of the form.

## Editing Meeting Blocks

To edit the Meeting date, click on the Meeting Calendar Icon and choose a new date.

To edit meeting information click in a field and highlight the information and type over it.

To edit the file type, click the drop-down arrow and choose another option.

## Deleting Meeting Blocks

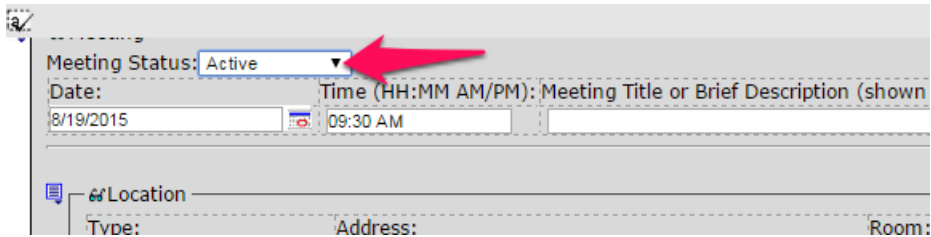
To delete a meeting block, click the *meeting\_item* icon and choose Remove from the drop-down menu.

To delete a Location block, click the *location\_item* icon and choose Remove from the drop-down menu.

To delete a document block, click the *document\_item* icon and choose Remove from the drop-down menu.

### ***Changing Meeting Status***

To change a meeting status click the drop-down menu and choose another option. Options include: Active, Cancelled & Rescheduled.



The screenshot shows a meeting form with the following fields:

- Meeting Status: Active (with a red arrow pointing to the dropdown arrow)
- Date: 8/19/2015
- Time (HH:MM AM/PM): 09:30 AM
- Meeting Title or Brief Description (shown)
- Location (with a location icon)
- Type: Address: Room: