

Downloading a PDF Packet in BoardBook Premier (updated 10/22/20)

Note, this document was updated to provide information about changes to how the report is reached as well as how the behavior of bookmarks in the downloaded packet has changed.

While BoardBook Premier was designed with an emphasis on making online use easy for your users, options have been included to make offline use of the materials easy. Using the steps described below you'll be able to download a PDF packet containing your agenda and attachments.

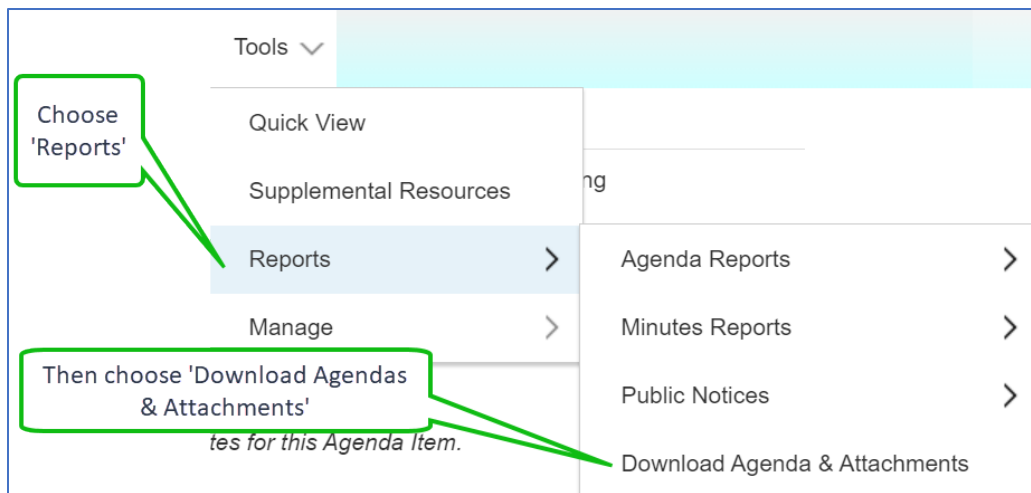
NOTE: Only attachments eligible for download will be available to be included in the packet.

In this document we will cover the following subjects:

- Creating the PDF Packet
 - Using a different Template
 - Changing how information is ordered / displayed
 - Excluding attachments from the packet
- Navigating the PDF Packet

Creating the PDF Packet

From either the Home Page or Meetings, Minutes, and Agendas, screens click on your meeting and choose 'View Meeting Details (Join Meeting)'. Now from the light blue menu bar choose 'Tools' and choose 'Reports'. In the reports menu choose 'Download Agendas & Attachments'. This is shown below:



This will open a side menu which shows each item which has at least one attachment to download. Each individual attachment is shown with a check box allowing you to exclude or include attachments:

Template:
 Agenda with consent
 Download Close

Include Attached PDFs?
 Yes, After the Entire Agenda

Check all the Attachments you want to include.

Approve Last Meeting's Minutes
 Minutes of Last Meeting

Financials
 Check Register
 Financial Report

Discuss and possibly approve construction of a Bus Barn
 Bus Barn (Construction Masters) contract
 Download Close

Working from the top of the menu let's see what each section does:

Template

The 'Template' drop down allows you to choose which 'Agenda Report Template' will be used to generate the report. The default agenda report template for the meeting will be chosen. To choose a different 'Agenda Report Template' simply use the drop down.

Template:
 Agenda with consent
 Download Close

Include Attached PDF's

The 'Include Attached PDF's' drop down will allow you to choose from four different options. Each option is described below the screenshot:

Include Attached PDFs?
 Yes, After the Entire Agenda
 [No, Do Not Include Attachments]
 Yes, After Each Agenda Item
 Yes, After the Entire Agenda
 Yes, in a Zip file

No Do Not Include Attachments – This will simply create and download the Agenda Report.

Yes, After Each Agenda Item – Similar to the meeting 'quick view' this will list the agenda down until the first item with an attachment. Any attachmet or attachments for that item will be displayed and then the agenda will continue listing agenda item starting with the next item, breaking for each attachment.

Yes, After the Entire Agenda – This will display the complete agenda followed by the attachments in the order that are placed in the meeting.

Yes, in a Zip file – This downloads the agenda report and a zip file containing the attachments.

Check all the Attachments you want to include.

If you wish to create a download which excludes one or more attachments you can remove the check mark from any attachment or attachments and they will not be included in the download

The screenshot shows a web form with the following sections and items:

- Check all the Attachments you want to include.**
- Approve Last Meeting's Minutes**
 - Minutes of Last Meeting
- Financials**
 - Check Register
 - Financial Report
- Discuss and possibly approve construction of a Bus Barn**
 - Bus Barn (Construction Masters) contract

Navigating the PDF Packet:

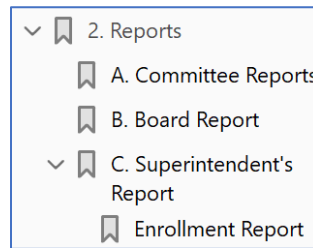
Let's have a quick look at the created packet. For this example, we will be looking at a packet created using the 'Yes, After the Entire Agenda' option where the attachments follow the complete agenda.

NOTE: While there are dozens of PDF readers available, for consistency all screenshots are shown using a downloaded packet opened with Adobe Acrobat Reader DC. Other PDF readers may display or use bookmarks differently or may not display or use them at all.

In our downloaded PDF we will have bookmarks available for each agenda item. Clicking on and Agenda Item bookmark will adjust the packet to display that agenda item at the top of the screen. Notice in the screenshot below that items with either subitems or attachments are show with a > next to the bookmark.

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- The screenshot shows a list of bookmarks in a PDF reader:
- Agenda
 - > 1. Call to Order
 - > 2. Reports
 - > 3. Consent Agenda
 - > 4. Action Items
 - 5. Discussion Items
 - 6. Adjournment

In the example below I have clicked on > next to item 2. Reports and you can now see the subitems under that item. I've then clicked on the subitem C. Superintendent's Report and we can see the attachment 'Enrollment Report'. Clicking on the 'Enrollment Report' attachment would navigate to that page in the PDF packet.



In this manner a user may use the bookmarks to go to any item or attachment easily.