BoardBook®

View Meeting Materials Using Meeting Quick View

Whether reviewing meeting materials prior to a meeting or signing in during a meeting, viewing meeting materials in BoardBook® Premier is easy.

Selecting the Meeting

First, log in, this can be done using the meeting link in the notification email (which will take you directly to the 'View Meeting Details' screen), or you can use the Premier login link/address shown below:

https://login.boardbook.org/

The login link takes you to the 'Home' page which displays a limited list of the newest meetings, if you find the meeting you are looking for you can move to the next paragraph. A more extensive list of meetings is found on the Meetings screen. Navigate to that screen by using the Gray Menu Bar which runs across the screen. In the Gray Bar click on 'Meetings' and then 'Meetings, Minutes, and Agendas'.

Once you've found your meeting, click on the date/time/meeting title link. This will display a list of options. Choose the option 'Meeting Quick View' as shown below.
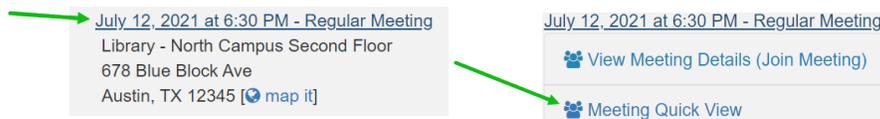
Viewing the Meeting

On the left side of the Meeting Quick View screen we'll see a 'View Options' side bar, in the main area we'll see a download option and the list of the agenda items and any other information we've selected to view.

The 'View Options'

The agenda will always show each agenda item. For any given item there may be more information available. The View Options sidebar controls what information will shows on our screen. In the screenshot below, I've checked 'Presenter' and 'Description'. For item 1. Call to Order the presenter is shown. If any of my items had Notes, Recommended Motions, Actions, or Attachments I would not see them as they are unchecked.
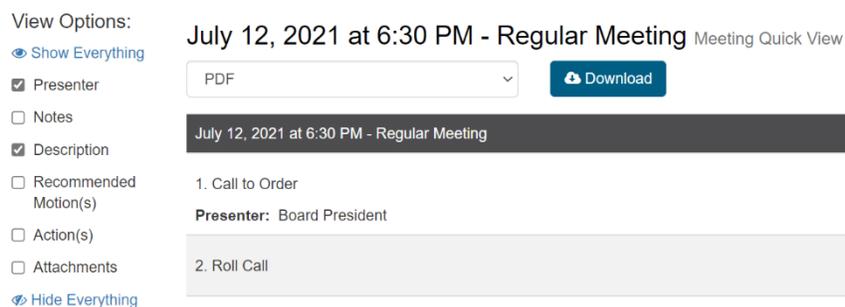
Please note that the specific view options for your account may differ.

The Agenda:

The agenda shows as a list of agenda topics or subjects. Each item may have additional information which we may see depending on our 'view options'. Below is an agenda item with examples of additional information:


6.A. Discuss and possibly approve the start of construction on the new parking lot.

Presenter: Facilities Manager
Description: Reminder, the bid process and selection for this project were completed during the March 2020 Regular meeting
Recommended Motion(s): Move to begin construction on the new parking lot no later than the end of September
Attachments: (3)

📄 Building and Grounds Report

🖼 Site Pictures

📄 Parking Lot Project

Agenda item showing Presenter, Description, Recommended Motion, and Attachments

Attachments: Clicking on an attachment will open it in the display area.

At the top of the Display Window there will be a tab for the agenda, and one tab for each attachment you have open. Attachment tabs display the file name. As needed, you can switch between tabs, even returning to the agenda to open additional attachments. Attachments may be closed by clicking the X in that tab. Clicking the Agenda tab returns the main display view

Agenda   File: Building and Grounds Report ✕   File: Site Pictures ✕

Agenda tab and tabs for two attachments
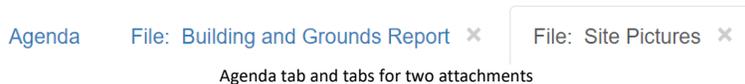
With an attachment open you have a variety of controls to view, annotate or highlight your copy of the attachment.

Attachment options
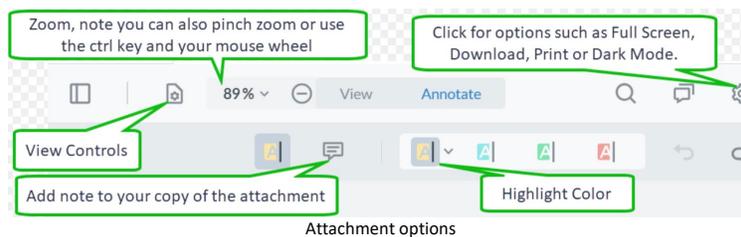
Limitations of the Meeting Quick View:

BoardBook Premier has several meeting management features. These features are optional and not all organizations use them. The features below are specifically for the 'View Meeting Details' page and will not work on the Meeting Quick View page.

Lead / Follow: This feature allows a user with the 'Meeting Leader' permission lead the navigation of the meeting. Board members or other viewers may choose to 'Follow'.

Raise Hand: This feature allows a board member or other viewer to attract the attention of the 'Meeting Leader'

Electronic Voting: This advanced feature allows board members to review a motion and cast their vote electronically.

Check with your agenda manager or meeting leader to see if any of these features are in use at your organization.