



Novus BOARD VIEW - Executive Portal

Training Manual V4.4

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Board View

The Board Portal is where users login with a secure username and password. This ensures that each user has access to their private information. On this site you have the ability to view the Agenda and make comments in preparation for the board meeting.

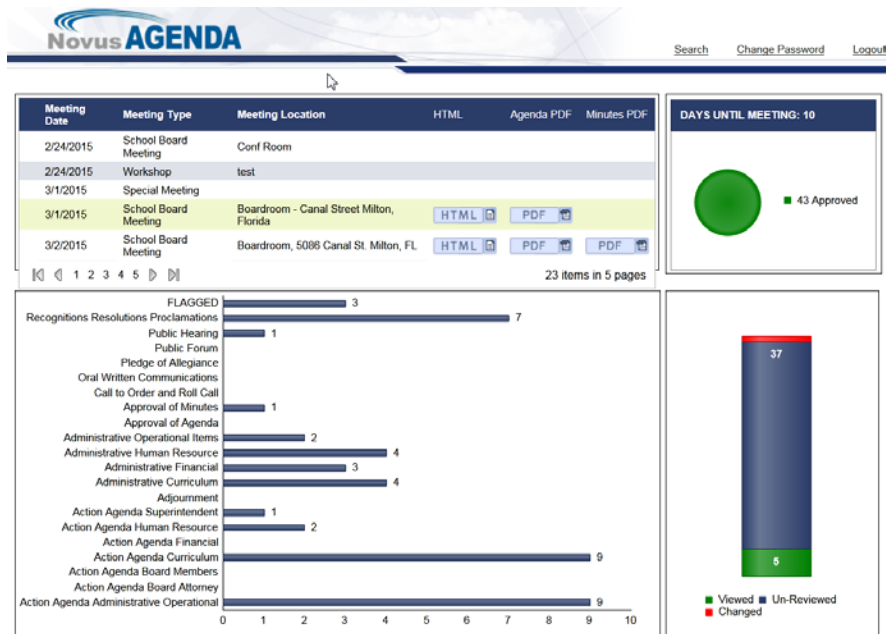
Username

Password

[Forgot Password](#)



Dashboard View / Meeting Preparation



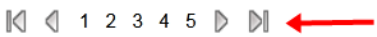
The Dashboard is the starting screen that you will be directed to upon logging into Board View.

The Dashboard View contains 4 main components for meeting preparation.

- Calendar – Shows all upcoming meetings.
- No. of Days until the meeting and No. of items that have been fully approved by staff to go on this agenda.
- Items by category, the blue bar shows the number of items in each agenda category.
- Items Reviewed and the item not yet reviewed. Items in red have had a significant change and need a last minute review.

Calendar

Meeting Date	Meeting Type	Meeting Location	HTML	Agenda PDF	Minutes PDF
2/24/2015	School Board Meeting	Conf Room			
2/24/2015	Workshop	test			
3/1/2015	Special Meeting				
3/1/2015	School Board Meeting	Boardroom - Canal Street Milton, Florida	HTML	PDF	
3/2/2015	School Board Meeting	Boardroom, 5086 Canal St. Milton, FL	HTML	PDF	PDF


23 items in 5 pages

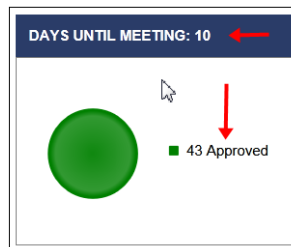
The Calendar shows all upcoming meetings in the system. It also shows the previous days meetings in order to review those that just passed. Use the scroll buttons at the bottom to navigate to see all of the meetings listed.

All future meetings will be listed here. Even though a meeting is listed, all of the items may not have been approved yet and it may not

be marked for viewing. This is the difference between those with the HTML/PDF buttons available and those that do not have these.

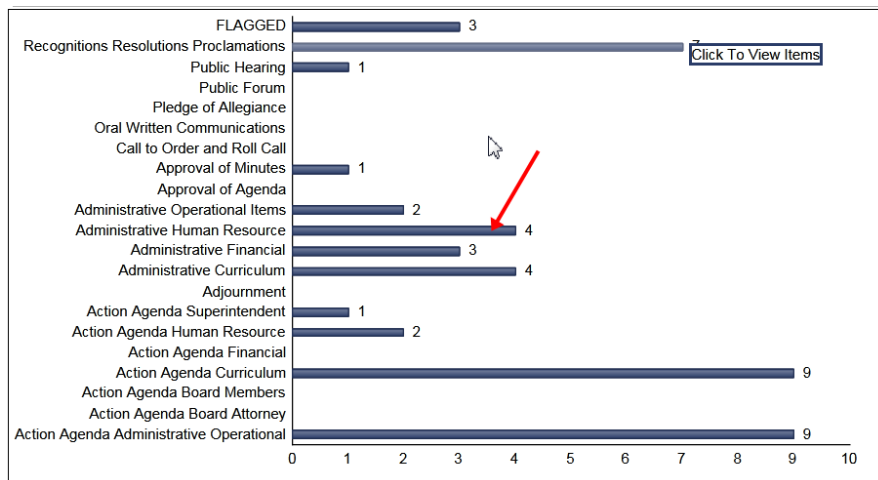
The meetings marked for viewing will be available when the HTML link is shown in the column. You can also download the agenda PDF and the minutes PDF if available. We suggest using the HTML version for the meeting since it is more efficient.

Number of Days Until Meeting

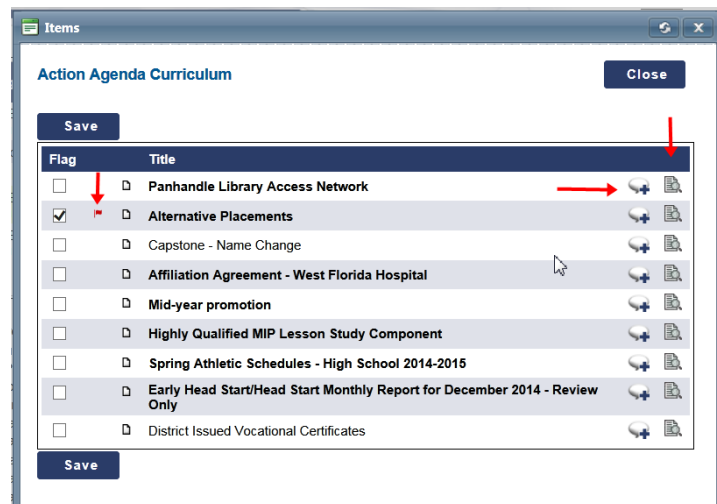


This chart shows the number of days left until the meeting, how many items are on the agenda and how many items still need to be approved by staff.

Number of Items by Agenda Category



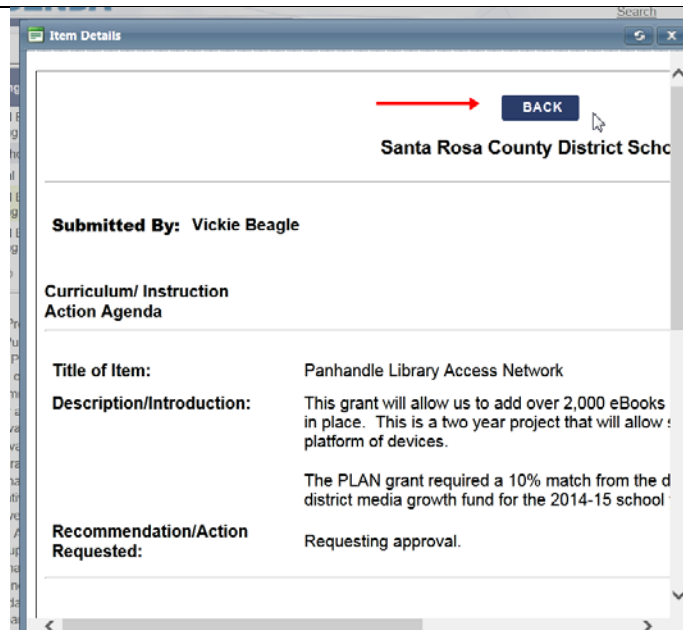
Shows you how many items are in each agenda category. To view the items click on the blue indicator bar for that category.



A screen listing all of the items in that category appears. Use the cover sheet link to view the item details and access Attachments. Next to the coversheet link is the comment link allowing users to add private personal comments as part of their meeting preparation.

To the left of each item title is the attachment indicator. When present it alerts the user that there are attachments on this item. Users access attachment by viewing the cover sheet.

The flag feature, far left allows users to flag items for their personal attention. Individual flags are set by each users and are only viewed by that user, not others.



Item Details

Search

← BACK

Santa Rosa County District School

Submitted By: Vickie Beagle

Curriculum/ Instruction
Action Agenda

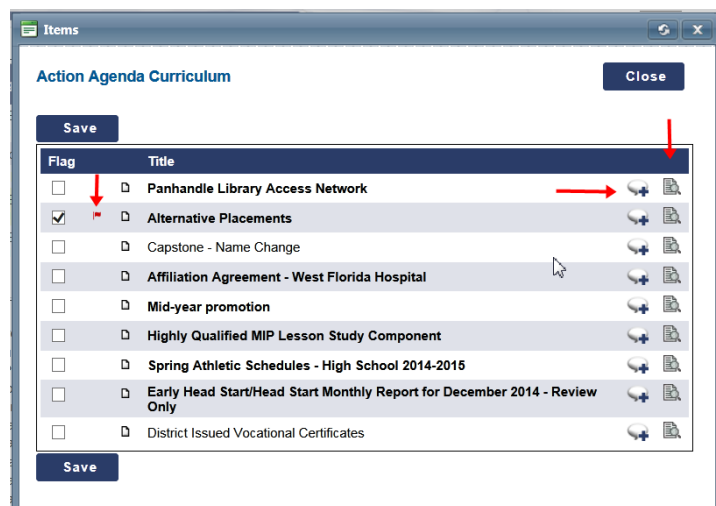
Title of Item: Panhandle Library Access Network

Description/Introduction: This grant will allow us to add over 2,000 eBooks in place. This is a two year project that will allow : platform of devices.

The PLAN grant required a 10% match from the d district media growth fund for the 2014-15 school

Recommendation/Action Requested: Requesting approval.

Once the cover sheet is open you can review the details on this individual item. When you are finished viewing this item scroll to the top and use the back button to return to the list. Attachments are at the bottom of the cover sheet and you can open them by clicking on the attachment link



Items

Action Agenda Curriculum

Close

Save

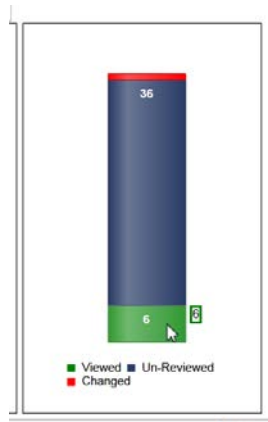
Flag	Title	
☐	Panhandle Library Access Network	
☒	Alternative Placements	
☐	Capstone - Name Change	
☐	Affiliation Agreement - West Florida Hospital	
☐	Mid-year promotion	
☐	Highly Qualified MIP Lesson Study Component	
☐	Spring Athletic Schedules - High School 2014-2015	
☐	Early Head Start/Head Start Monthly Report for December 2014 - Review Only	
☐	District Issued Vocational Certificates	

Save

Back on the items screen you can add or access comments that you had previously added by clicking the comment bubble. Be sure to

save any comments after entering them. You can access them during the meeting. Comments are unique to you. Only you can see your comments. If the comment bubble has a Plus sign, +, on it that indicates there are no existing comments on that item.

Flag



Click the check box next to an item to flag it for further review or for special note to come back to it later. This will put the item in category called FLAGGED on the Dashboard for that particular meeting. Clicking the blue bar for FLAGGED will bring up all items flagged for additional review. Flagged items are private and only seen by you.

Once you are finished reviewing all of the items in this category, use the close button to return to the dashboard and go to the next category.

Items Reviewed

Shows how many items have been reviewed, how many items need to still be reviewed, and how many have been changed since your last viewing. A red indicator will appear at the top of the chart if any items have been changed since the last time you reviewed this item. This means that the agenda preparer has made a change to an item and used the notify feature to make you aware of the change.

To review any of the items that need to be reviewed you can click on the blue portion of the bar and it will bring up a list of the items needing review. You can then scroll through and review those items. You can also view the already viewed and changed items by clicking the green or red portions respectively.

During the Meeting

Meeting Date	Meeting Type	Meeting Location	HTML	Agenda PDF	Minutes PDF
2/24/2015	School Board Meeting	Conf Room			
2/24/2015	Workshop	test			
3/1/2015	Special Meeting				
3/1/2015	School Board Meeting	Boardroom - Canal Street Milton, Florida	HTML	PDF	
3/2/2015	School Board Meeting	Boardroom, 5086 Canal St. Milton, FL	HTML	PDF	PDF

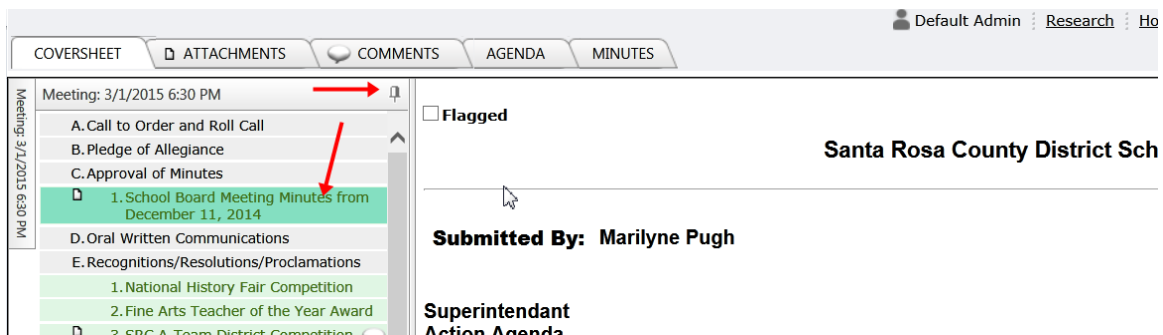
23 items in 5 pages

From the dashboard, click on the HTML link to the right of the meeting that you want to participate in and you will be taken to the in meeting view.

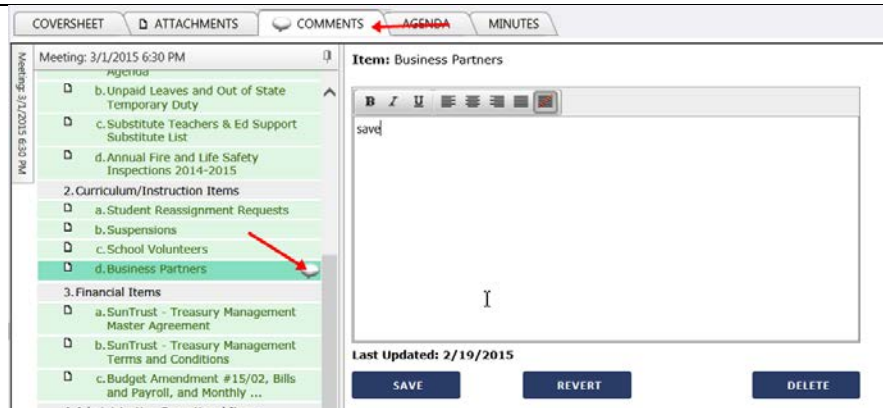
u. suspensions
c. School Volunteers
d. Business Partners
3. Financial Items
a. SunTrust - Treasury Management Master Agreement
b. SunTrust - Treasury Management Terms and Conditions
c. Budget Amendment #15/02, Bills and Payroll, and Monthly ...
4. Administrative Operational Items
a. Facility Use Requests
b. Field Trip Requests
I. Administrative/Operational Recommendations- Joey Harrel ...
1. Exceed The Limit 012215
2. Surplus 012215
3. Food Service Quarterly Update
4. DAG Architects Agenda Items
5. Pinder Martin Agenda Items
6. Schmidt Agenda Items

On the left side of the screen is the list of all the items on this meeting agenda. We suggest using this list view because it is very efficient to navigate particularly on tablet devices which are common in today's meetings.

This list displays all the categories and items for that particular meeting. Categories have a gray background and items have a green background. From this view you can see items cover sheets, items that have comments, Attachments, and items with Flags for personal attention.



Click on an item to view the cover sheet, which will appear in the right window. If you would to make this the size of the full page, use the tack to PIN and unpin the tree view for more viewing area. Notice that the item that you selected is now highlighted. Across the top there are tabs that you can toggle through for the comments, attachments, agenda and minutes. Minutes will be available when the have been published.

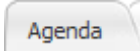
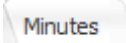


Click on a comment bubble to bring up the comment or an alternate method for the bubble comment it to select the comments tab at the top.

Traditional Agenda View

Toggling between Agenda and Minutes tabs

Once the desired meeting or comment has been selected, the meeting for that date will display on the next screen.

You now have options to view the AGENDA or MINUTES for that particular meeting date. Simply click on the  "Agenda tab" or  "Minutes tab" to toggle between the two screens.

If there are no minutes for that particular date, a message will be displayed:

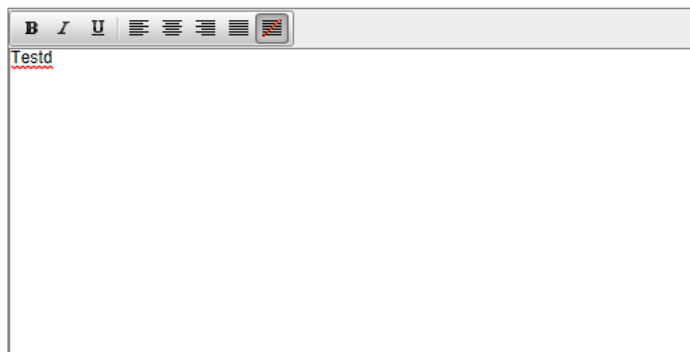
Minutes have not yet been published for this meeting.

Comments

1. Special Session	
1. Item Title 3.9.6 TEST	
2. Care Test Cat	
2. Item Title 3.9.6	
3. Item Title 3.9.6	
4. Item Title 3.9.6	

With an item selected, click the comment tab to add/remove comments. The comment bubble  displays on the list view to the right of an item title if there is a comment for that particular item.

To Add a Comment



A rich text editor window with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Decrease Indent, Increase Indent, and a Table icon. The text area contains the word "Testd" with a red squiggly line underneath it, indicating a spelling correction suggestion.

Last Updated: 5/15/2013

SAVE

CANCEL

DELETE

You can then start typing in the rich text box to add a comment or edit existing text.

The Item Comment box is a rich text box. You can have options to **bold**, **italicize**, **underline** and **align** the comments. Once you have completed adding your comments, simply press "**Save**" to save or "**Cancel**" to close the window and cancel your comments.

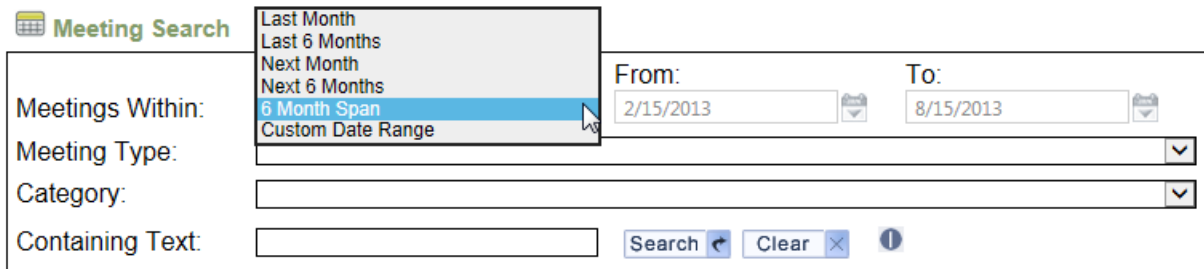
Once you press **Save**, your comments will be saved for this item, and the window will close. Or click the cancel if comment should not be changed.

Your item will now show a  **White Comments Icon** beside the item, indicating there is already a comment for that item. You can click on that comment again at any time to edit or delete the comment.

Delete an Existing Comment

If there is an existing comment and you want to delete it, click Delete Comment to remove the comment added.

Search Screen / Doing Research on Past Meetings



The Meeting Search form includes a 'Meetings Within:' dropdown menu with options: Last Month, Last 6 Months, Next Month, Next 6 Months, 6 Month Span (highlighted), and Custom Date Range. To the right are 'From:' and 'To:' date input fields with calendar icons, showing dates 2/15/2013 and 8/15/2013 respectively. Below these are fields for 'Meeting Type:', 'Category:', and 'Containing Text:'. At the bottom right are 'Search' and 'Clear' buttons, along with an information icon.

To Search for a meeting, click the  button.

Search for by **Meetings Within**

Last Month
 Last 6 Months
 Next Month
 Next 6 Months
6 Month Span
 Custom Date Range

To use the date fields, you must select "custom date range" from the "Meetings Within" filter.

Meeting Search

Meetings Within:	Custom Date Range	From:	2/15/2013	To:	8/15/2013																																																								
Meeting Type:		May 2013 <table border="1" style="margin: auto; border-collapse: collapse;"> <thead> <tr> <th></th> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> </tr> </thead> <tbody> <tr> <td>18</td> <td>28</td> <td>29</td> <td>30</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>19</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>20</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>21</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>22</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td>1</td> </tr> <tr> <td>23</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> </tr> </tbody> </table>					S	M	T	W	T	F	S	18	28	29	30	1	2	3	4	19	5	6	7	8	9	10	11	20	12	13	14	15	16	17	18	21	19	20	21	22	23	24	25	22	26	27	28	29	30	31	1	23	2	3	4	5	6	7	8
	S					M	T	W	T	F	S																																																		
18	28					29	30	1	2	3	4																																																		
19	5					6	7	8	9	10	11																																																		
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21	19	20	21	22	23	24	25																																																						
22	26	27	28	29	30	31	1																																																						
23	2	3	4	5	6	7	8																																																						
Category:																																																													
Containing Text:																																																													

Other filters are *Meeting Type*, agenda *Category* and *Containing text*. Once you make your selection, press the Search button, or to clear search choose the clear button.

Meeting Type:		▼
Category:		▼
Containing Text:		Search Clear i

Viewing Item Details in Your Search Results

Meetings	Items	Comments			
Date	Title	Category	Meeting Type	Location	
5/30/2013	pk test item changed again	Reports to the Board	Default Meeting	test	
5/22/2013	PK Test Item one	General Session	IDPBuilder	Conference Room	
5/22/2013	PK Test Item two	Proclamations	IDPBuilder	Conference Room	

You can view each of the item's details, by clicking on the item title.

Once you click on the item, the *Item Details* window will open with that item cover sheet displaying the details of the item.



IDP Builder Coversheet

Ordinance Number:

Bill Number:

Report Number:

Resolution Number:

Staff:

Novus Item PK test one

Displayed Title:

Novus Item PK test one

Item Type:

Checkbox List Test:

Date Test:

ATTACHMENTS:

No Attachments Available

Using the Research

Use this Research feature to search for other meetings without leaving the meeting you are currently on. It works the same way the regular search feature does.

You can do this by clicking the **SEARCH** button and searching for meeting dates that contact information you are interested in. Once there, you can view and copy important information, close the search window and paste your comments in any of the comments sections.

 **Meeting Search**

Meetings Within:

Custom Date Range

From:

2/15/2013

To:

8/15/2013

Meeting Type:

Category:

Containing Text:

Search
Clear

Meetings
Items
Comments

Meeting Date	Meeting Type	Meeting Location	Agenda PDF	Minutes PDF
5/30/2013	Default Meeting	test		
5/22/2013	IDPBuilder	Conference Room		
4/24/2013	IDPBuilder	Test Location	PDF	PDF
4/1/2013	Default Meeting	test	PDF	
3/31/2013	IDPBuilder	Test Location		
3/31/2013	Default Meeting	PK Test Location		
2/28/2013	IDPBuilder	Mike's Office	PDF	

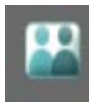
Request to Speak

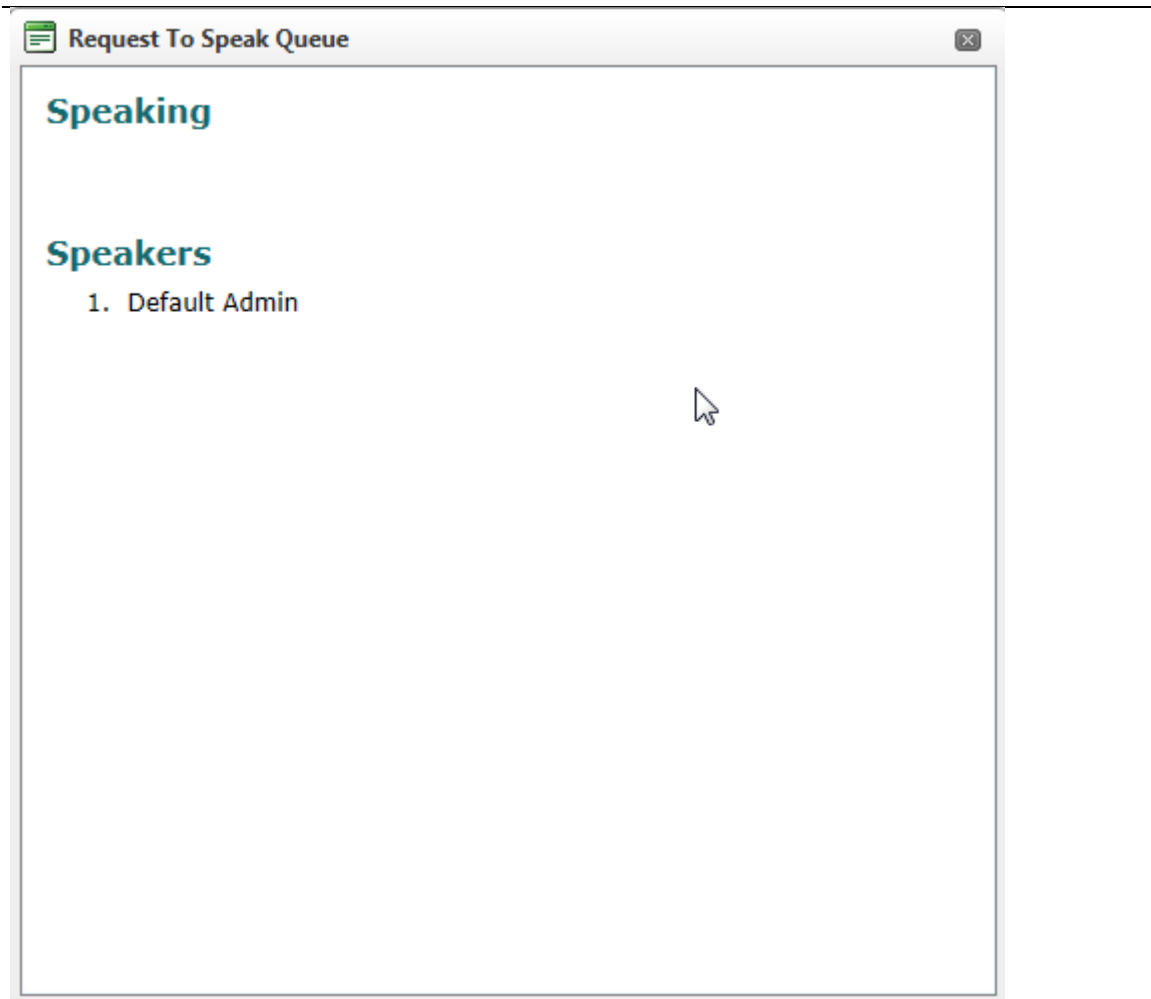
This button will appear on the top left of your screen if the minutes taker has activated the speaker queue option. Once activated you can request to speak on an item by simply clicking Request to speak.

Note that this feature may not be active in your system and if you want to activate have your system administrator contact NovusAGENDA.



The speaker queue will allow you to see who is queued up to speak and in what order. Click on the queue button to see that information.





- Allows users to view a queue for speakers during a meeting.

Buttons & Descriptions

Search  - allows you to search for new meeting dates with various filters

Research  - allows you research for other meetings while you are currently on a particular meeting

Comment  - Opens the current comments for a particular item

Edit Comment  - allows you to edit or add comments to an item

Delete Comment  - allows you to delete comments

Request to Speak  - allows users to manage a queue for speakers during a meeting.