Training Guide: Meeting Process

(Pre-Meeting, In-Meeting, Post-Meeting)

BROWSER SUPPORT

PrimeGov works best with Chrome. Firefox and Edge are also supported. Internet Explorer should not be used with PrimeGov

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Introduction to the PrimeGov Meeting Process

Hi there, thank you for using PrimeGov! We have put together this quick guide to help PrimeGov users get familiar with the pre-meeting, in-meeting and post-meeting processes in PrimeGov. We hope this guide acts as a helpful reference for new users and those looking for a refresher. Please reference the Table of Contents on page 2 to access specific areas in this document. You can also explore our knowledgebase for additional resources and training materials.

This is guide is intended for users carrying out meeting related duties. These duties are broken down into three stages of the meeting process:

1. **Pre-Meeting**
2. **In-Meeting**
3. **Post-Meeting**

Please note, you may not have some features outlined in this guide. Features like comments and speaker management are additional add-ons to contracts. Additionally, your permissions may not include all functionalities outlined in this guide. Please contact your main PrimeGov administrator with any questions.



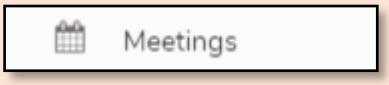
Pre-Meeting Process

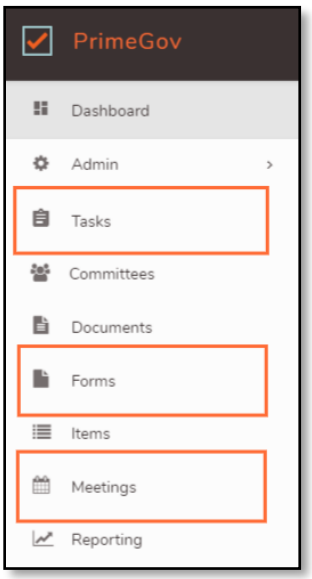
The Pre-Meeting Process includes all actions before a meeting starts – this guide walks a user through the process of creating and publishing an agenda. This includes but is not limited to adding items to an agenda, scheduling meetings and compiling agendas.

The Pre-Meeting process in PrimeGov consists of the following steps:

1. **Schedule a Meeting**
2. **Add an Item/ Complete and Submit a Form**
3. **Finalize Agenda**
4. **Compile and Publish an Agenda**

Main Pre-Meeting Areas in PrimeGov

Menu Item	Description	Menu View
Tasks	This is the to-do area. Any tasks assigned or delegated will be here for action.	
Forms	Forms allow users to submit an item to start through a workflow for approval.	
Meetings	This is where the meeting schedule lives. Existing meetings and new meetings are managed here.	



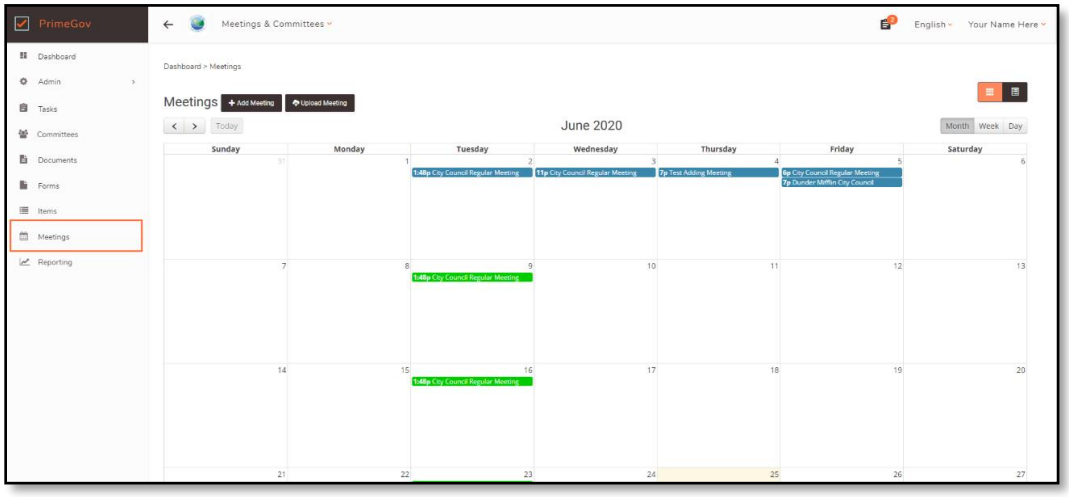
Meeting Scheduling

The following views guide the user through the process of scheduling a meeting through existing templates or ad-hoc.

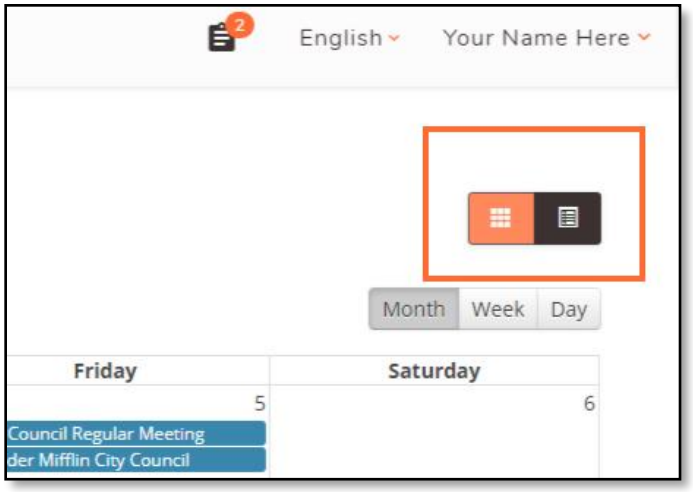
Meetings View

The meetings view shows proposed meetings (reoccurring schedule holds) and scheduled meetings confirmed on the calendar.

1. Open the left sidebar menu and select **Meetings**.



The upper right corner of the page has view options for the page. Highlighted in the image below, the information can be viewed by month, week, or day. The calendar view can also be changed to a list view. The calendar view is by default and is the icon on the left, in the image below. To change to list view, select **the list icon** on the right, in the highlighted box below.



Proposed and Scheduled Meetings

The PrimeGov system allows meeting templates to show on the calendar to allow for easy visibility of reoccurring meetings and quick creation. This saves time by knowing the standard meeting template is applied when the meeting is created or open a meeting (green to blue) for agenda items.

Proposed Meetings

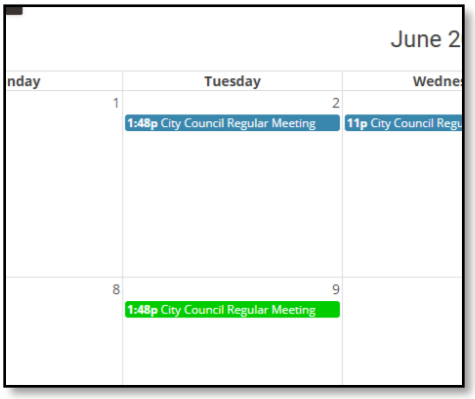
Proposed meetings are green on the PrimeGov meetings calendar.

These are reoccurring meeting schedules set up with each Committee's meeting templates. Any committee meeting times that were scheduled **to reoccur** will appear on the calendar as a green meeting. The green meetings are considered proposed meetings because they are not open to add any items to the agenda for that meeting. A proposed meeting must be scheduled to "open" the meeting for items on the agenda. Scheduled meetings on the calendar are blue.

Scheduled Meetings

Scheduled meetings are blue on the PrimeGov meetings calendar

These are meetings that were "opened" to add items to the agenda. Scheduled meetings can be created from the add meeting button or from a proposed (green) meeting.



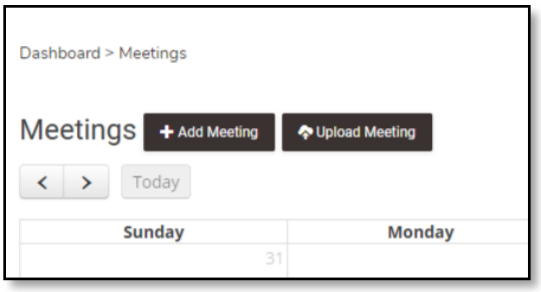
Scheduling a Meeting

Scheduled meetings can be created from the add meeting button or from a proposed meeting.

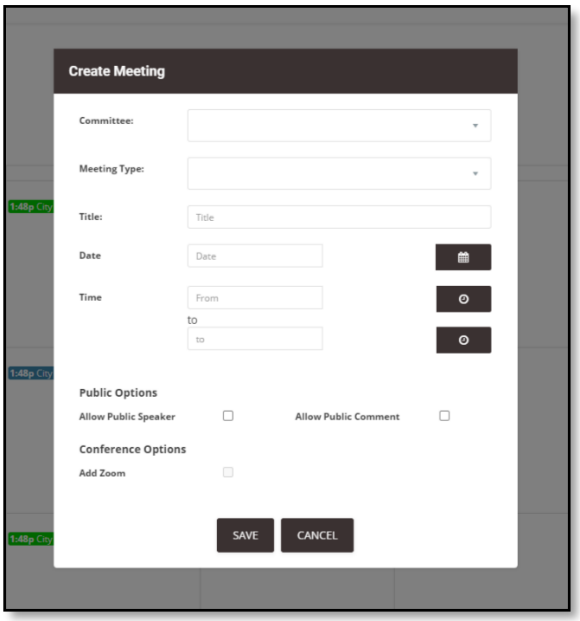
Add Meeting Button

The add meeting button is in the upper left area of the page. To create a new meeting:

1. Select **Add Meeting.**



2. Complete information in the **Create Meeting** popup window**.**
3. Select **Committee** from the dropdown.
4. Select **Meeting Type** from the dropdown
5. Add a **Title** for the meeting
6. Select the **Date** of the meeting
7. Select the scheduled **Start Time** and **End Time** of the meeting
8. Select the appropriate **Public Options:** Allow Public Speaker and Allow Public Comments. **Public options are specific to each implementation*
9. Select **Conference Options**: adding Zoom to the meeting. **Zoom is available if it is part of the implementation*
10. Click the **Save** button

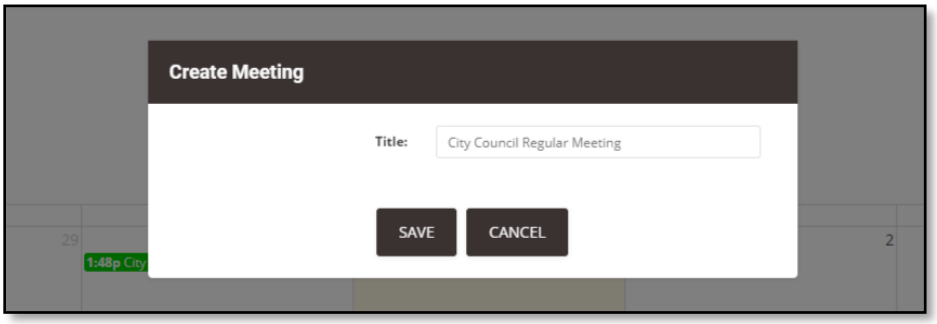


Converting a Proposed Meeting into a Scheduled Meeting

1. Select the green **proposed meeting** to schedule and open for items.



2. Confirm the meeting title and select **Save**.



Pre-Meeting Area

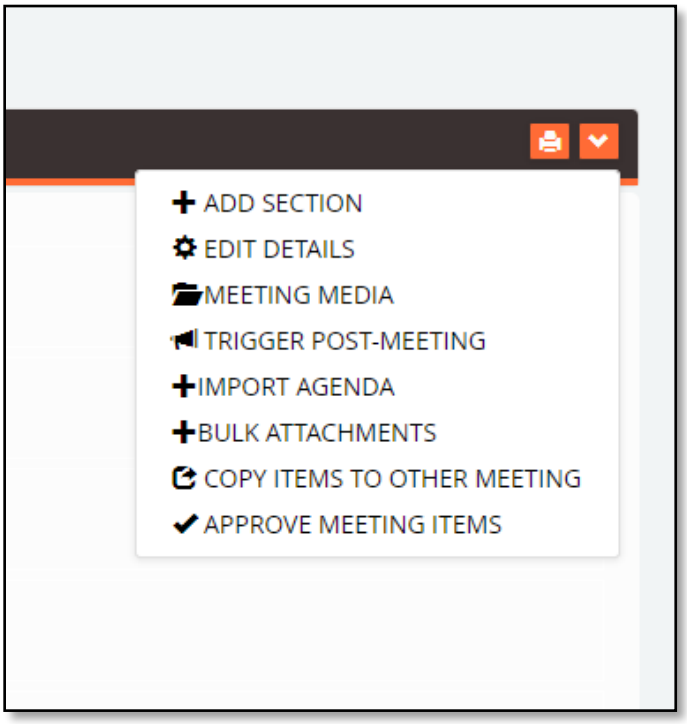
After a meeting is scheduled, the pre-meeting area is available with the agenda sections and items. Each meeting is created from a pre-defined template.

This pre-meeting area is the main work area for the Clerk to review and edit the agenda before compiling and publishing the agenda.



Pre-Meeting Agenda Options

Each agenda has a dropdown menu with additional options. The menu dropdown for the pre-meeting agenda options is in the upper right side of the agenda display in the meeting title bar (shown below).



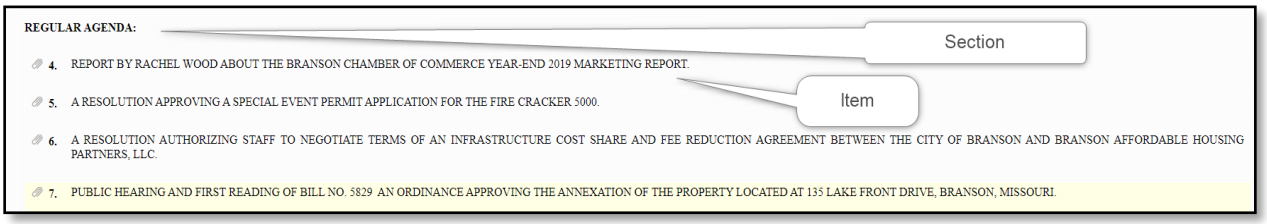
Agenda Options	Description
Add Section	Allows the user to add Sections to the Pre-Meeting area. The headings of an agenda are called Sections in the PrimeGov application
Edit Details	The edit details selection will take the user to a details area of the meeting. The user will be able to configure settings for the meeting in this area.
Meeting Media	The meeting area will take the user to a compilation area for the Agenda, Minutes and Packet. This will take the user to the same screen as the printer icon.
Trigger Post-Meeting	This provides the user with post meeting action functionality. Please note: this portion is not included for each client.

Import Agenda	This area allows for the user to upload a Microsoft Word version of the Agenda. This selection is based on decisions made during configuration. If using PrimeGov templates, this area will not be used.
Bulk Attachments	This allows to user to upload multiple attachments to an item.
Copy Items to Other Meeting	This allows the user to copy items from one meeting to another meeting (in the future).
Approve Meeting Items	This allows the Clerk to approve the meeting item from the Pre-Meeting area instead of going through workflow.

Sections and Items in an Agenda

The headings of an Agenda are **Sections** in PrimeGov.

Items are the subjects for consideration during the meeting. Items are added to the agenda under Sections. When using Forms in PrimeGov for Item approval: the *title* for the item will be displayed in the pre-meeting agenda.

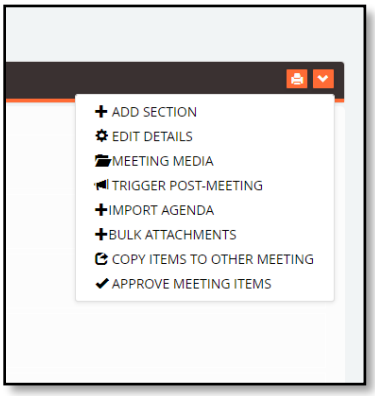


Add Section

When creating a meeting the standard template will apply for that meeting type, but sometimes new or unique sections need to be added to the meeting. When this occurs, new sections can be added by selecting the menu dropdown for the pre-meeting agenda in the upper right side of the agenda display in the meeting title bar.

To add a new section:

1. Select **the dropdown** for the pre-meeting agenda in the upper right corner (shown below)



2. Select **Add Section**
3. **Enter the Name** of the section
4. Click **Save**



The newly added section will appear at the bottom of the agenda. The user can move the section to any location within the agenda. *To move an agenda from one area to another:*

1. Hover over the section that needs to be moved and identify the **drag icon** (shown below).

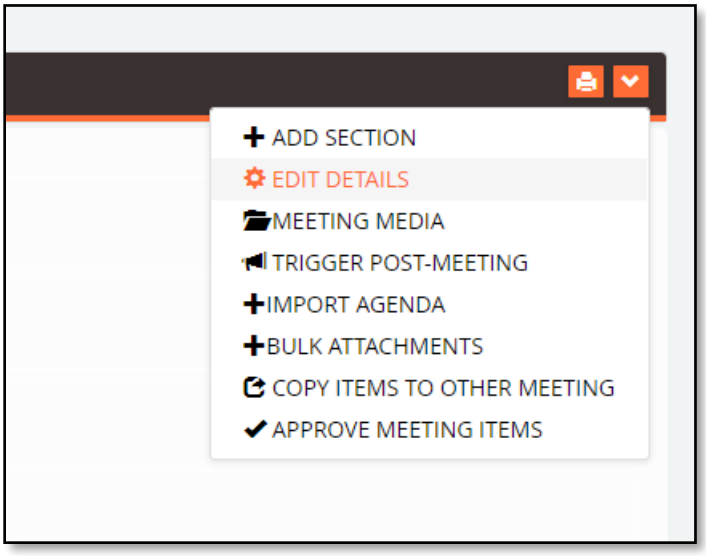


2. Use the drag and drop method to move the section. **Click, hold, and drag** the section to the desired location on the agenda and release the mouse button to place the section in its new area of the agenda. Any attachments or associated items will move with the section.

Edit Details: Meeting Settings

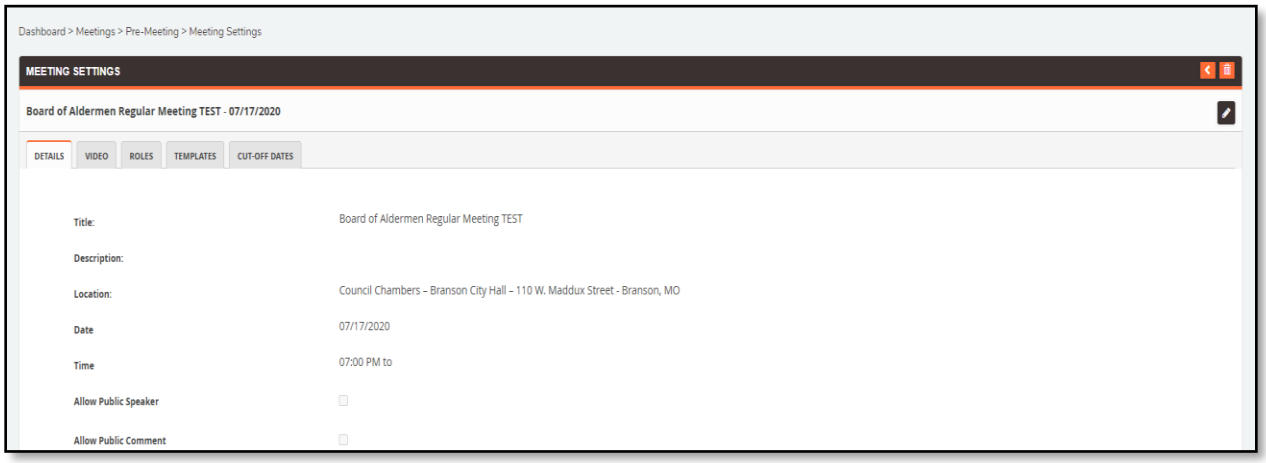
The **Edit Details** functionality will allow the user to access and edit the meeting information such as title, location, description, and time of the meeting. Also included in this area: YouTube video, timestamps, the meeting agenda template, roles within the meeting and cut-off dates and times.

1. Select the **down arrow** next to the meeting media icon
2. Select **Edit Details** from the drop-down menu

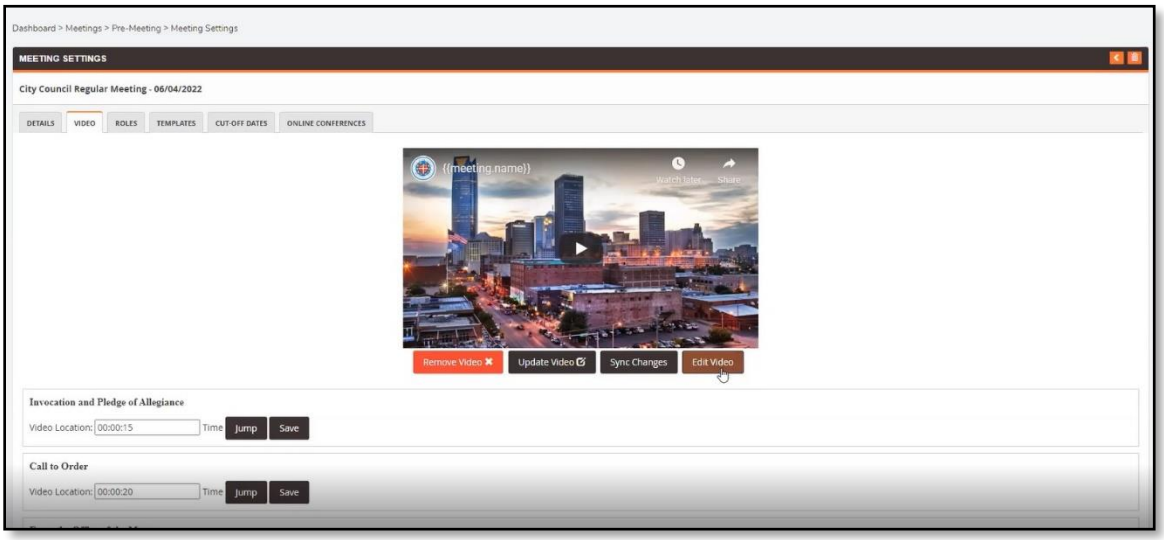


Selecting Edit Details will open the Meeting Settings screen. The Details Tab provides the information specific to the meeting in focus related to the title, description, location, date, and time.

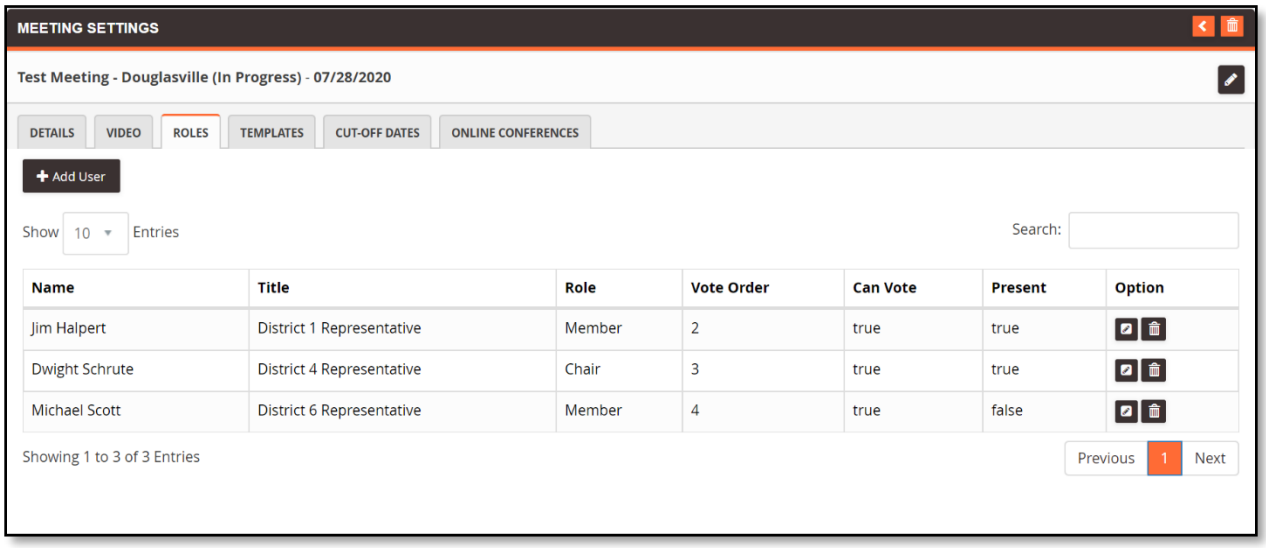
1. The **Details Tab** will be prepopulated with the information that the originator of the meeting established when scheduling the recurring or one-time meeting.



2. The **Video Tab** allows for modification of segment indicators within your recording(s) associated to the meeting in focus. Adding video segments allows for easy navigation to a certain portion of the video recording. Think of it like a video table of contents for your constituents. If they only wanted to view the public comment portion of the meeting, there would be a hyperlink for them to direct them to the exact starting point of that video segment. Should an edit to the timing interval be required for a video, simply navigate to the desired Section, or Item and add a new timestamp then click **Save.**



3. The **Roles Tab** is where users are assigned the role they will have in the meeting. The screen will show which users have been assigned to which roles, their title, voting order and voting capability. Users can also be added and assigned roles.

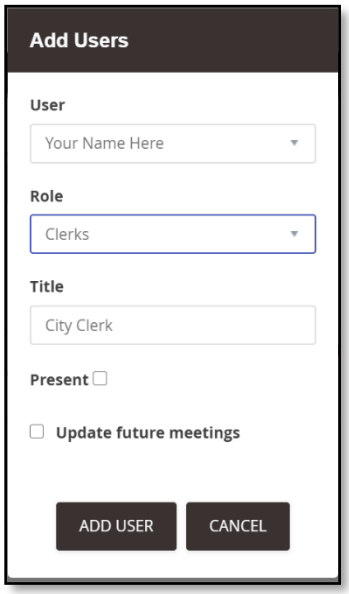


To Assign a new user role:

1. Select **Add User**



2. Select the **User** from the dropdown menu. Assign a **Role** and enter in their T**itle**. You may also mark them **Present** for the current meeting, although that may also be done in Roll Call. Additionally, they can be assigned the same role for future meeting by selecting **Update Future Meetings**. Finally, select **Add User** once the desired information is complete.



To Edit a User's role:

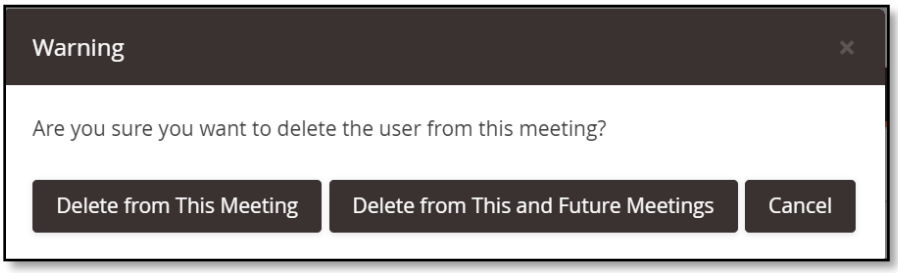
1. Select the **pencil icon** to the right of the user in the Option column.



2. This opens the Add User menu. Make changes as needed, then click **Update User** to save changes.

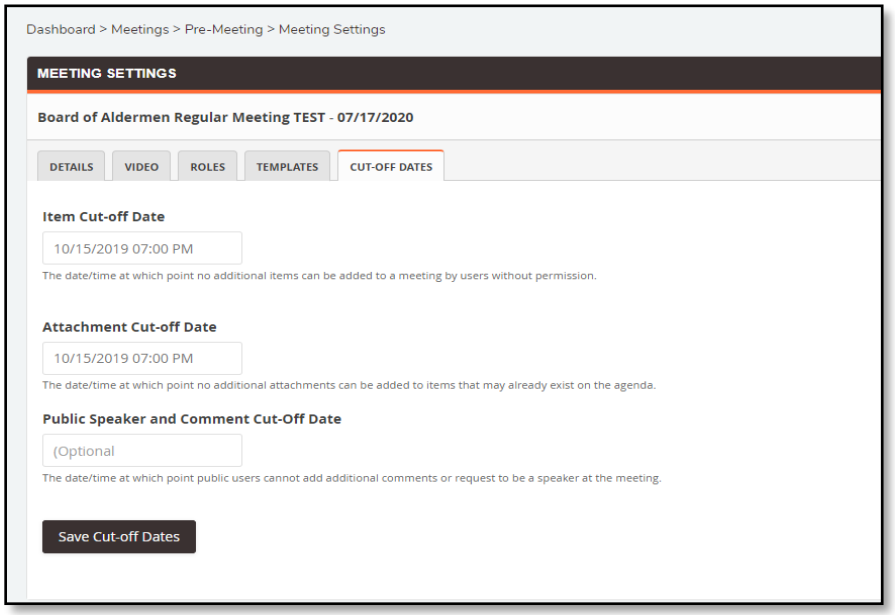
To Remove or Edit a User's role:

1. Select the **trashcan icon** to the right of the user in the Option column.
2. Select **Delete from This Meeting** to remove from the current meeting or select Delete from This and Future Meetings to delete the user role from the current and future meetings.



4. The **Templates Tab** allows for access to settings that are set prior to starting the meeting. The user can edit template settings for the meeting if required. It is advised that template settings should be configured from the standard template. Please see the section on editing Meeting Templates or reach out to the main PrimeGov administrator if you have any questions.

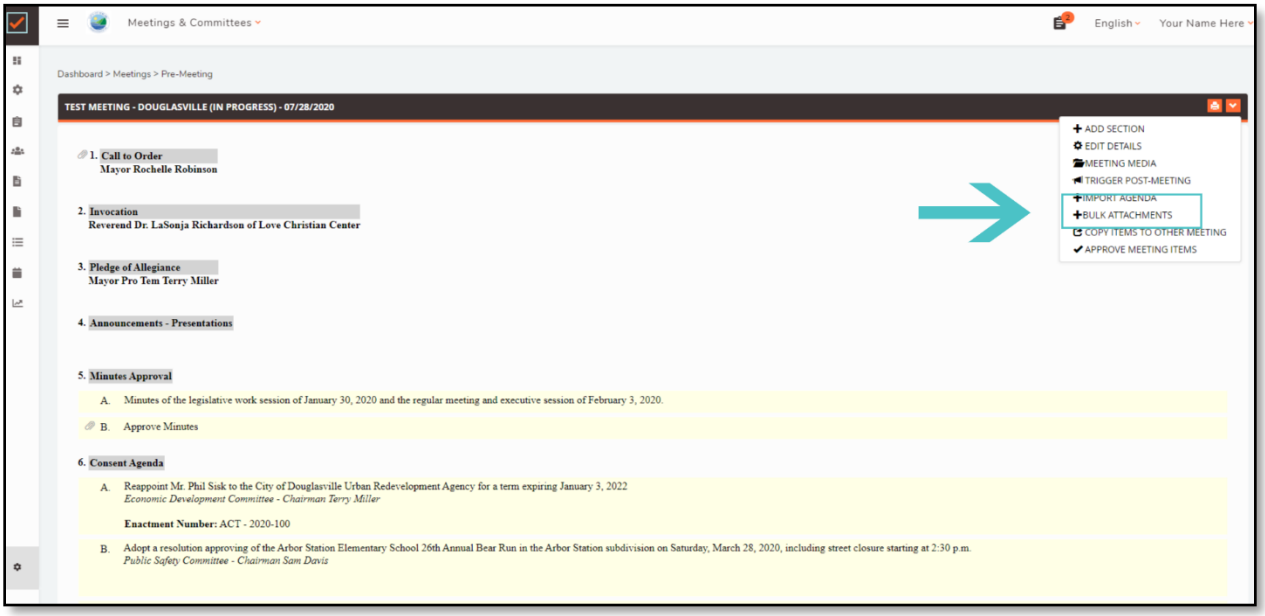
5. The **Cut-Off Dates Tab** allows for time defined submission restriction(s) for items and attachments specific to the agenda in focus. The cut-off dates will prevent PrimeGov users from submitting additional items or attachments after the date(s) entered in the cut-off fields. Cut-off dates may be entered for Items, Attachments, and Public Speaker & Comments. All are optional and none are required. Should an edit to the cut-off dates be required, simply select the **Edit** icon to open the page for modification(s).



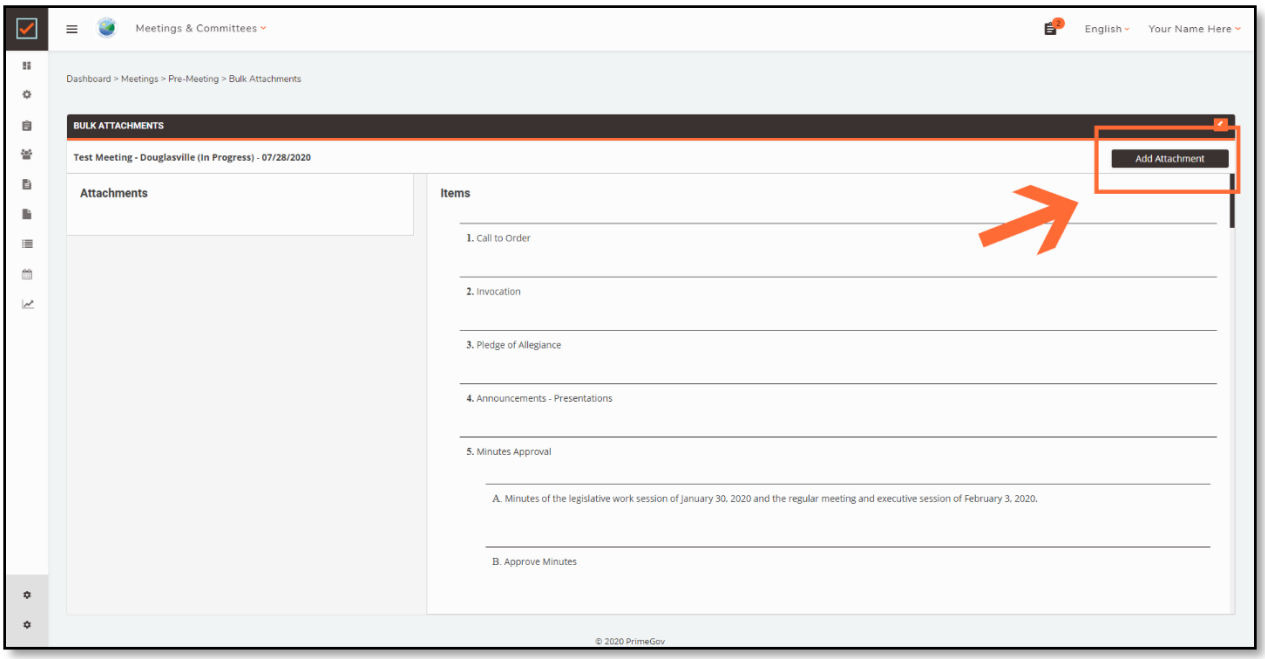
Bulk Attachments

The bulk attachments option will allow a user to attach multiple attachments to sections or items on one screen. To add attachments in bulk:

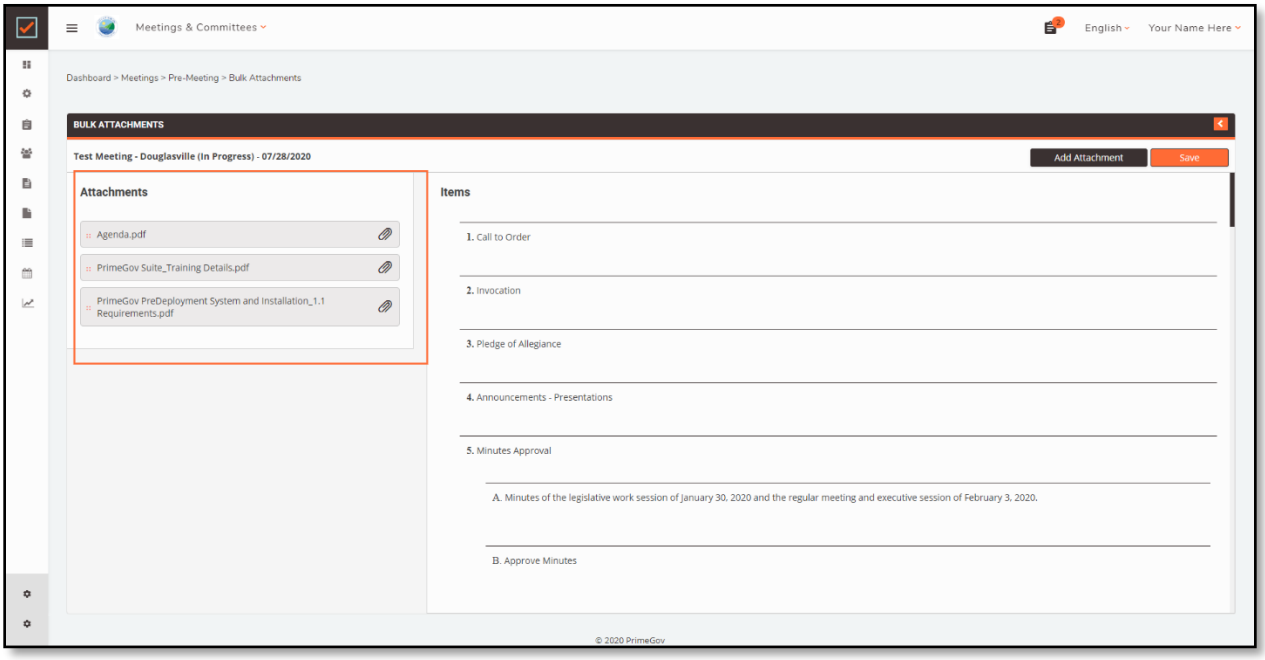
1. Access the pre-meeting area and select the **arrow icon** in the upper right area of the agenda page.
2. Select **Bulk Attachments** from the menu dropdown.

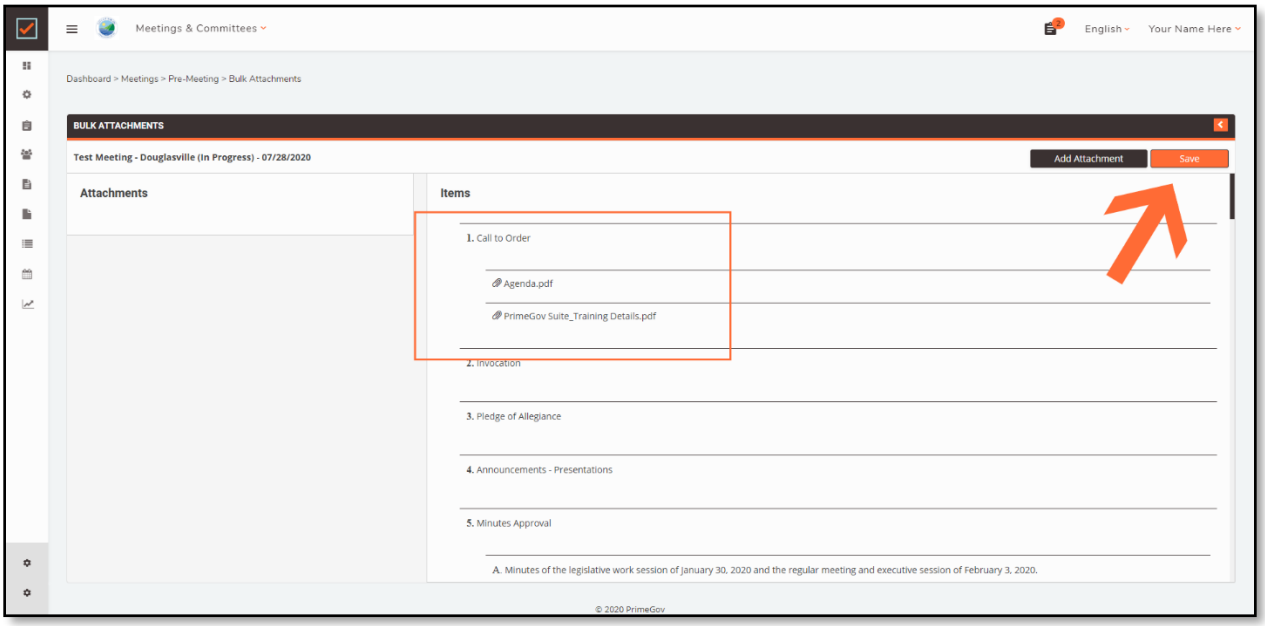


3. Select **Add Attachment** on the next screen. Select **the attachment(s)** to add to the agenda. Those will load on the left side of the screen, under Attachments.



4. Attachments are listed on the left the user can drag and drop them to the appropriate section or item on the agenda. Select **Save** once the documents are correctly placed. Drag and drop them within the agenda too.

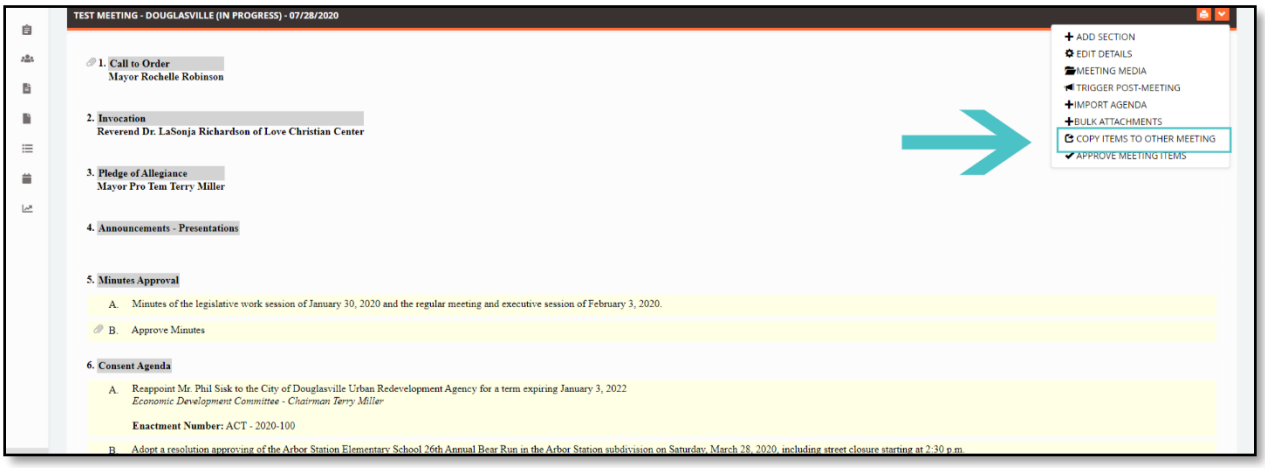




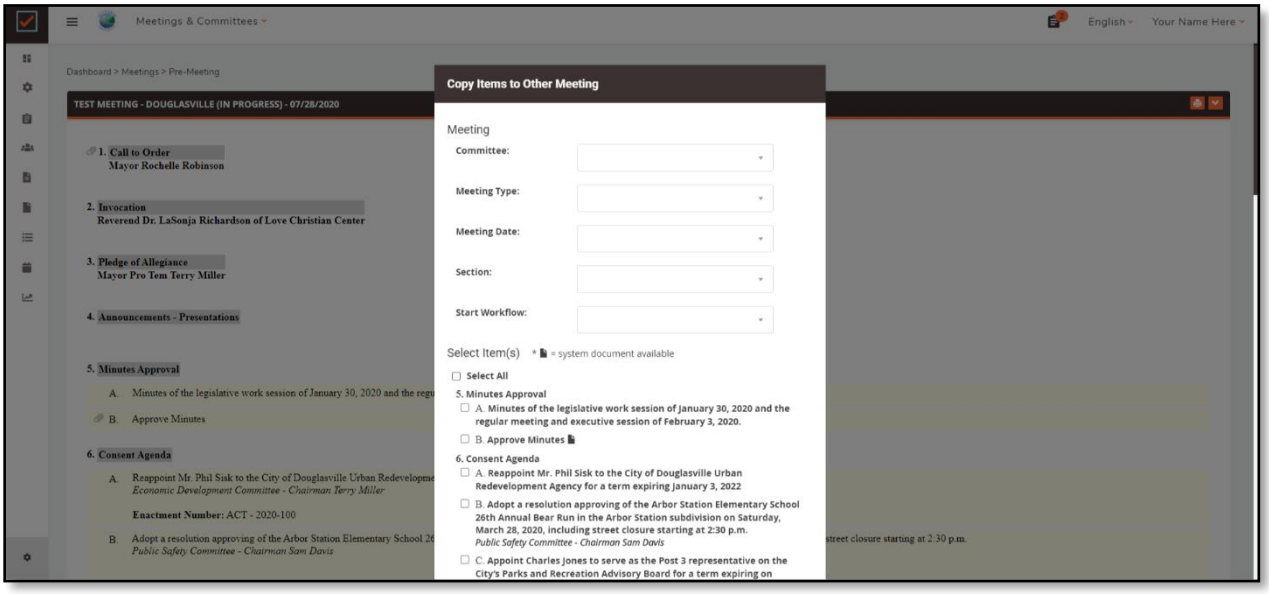
Copy Items to Other Meeting

In the event items need to be copied from one meeting to another the PrimeGov system allows users to do this in bulk or one at a time if needed. To copy items from one meeting to another meeting:

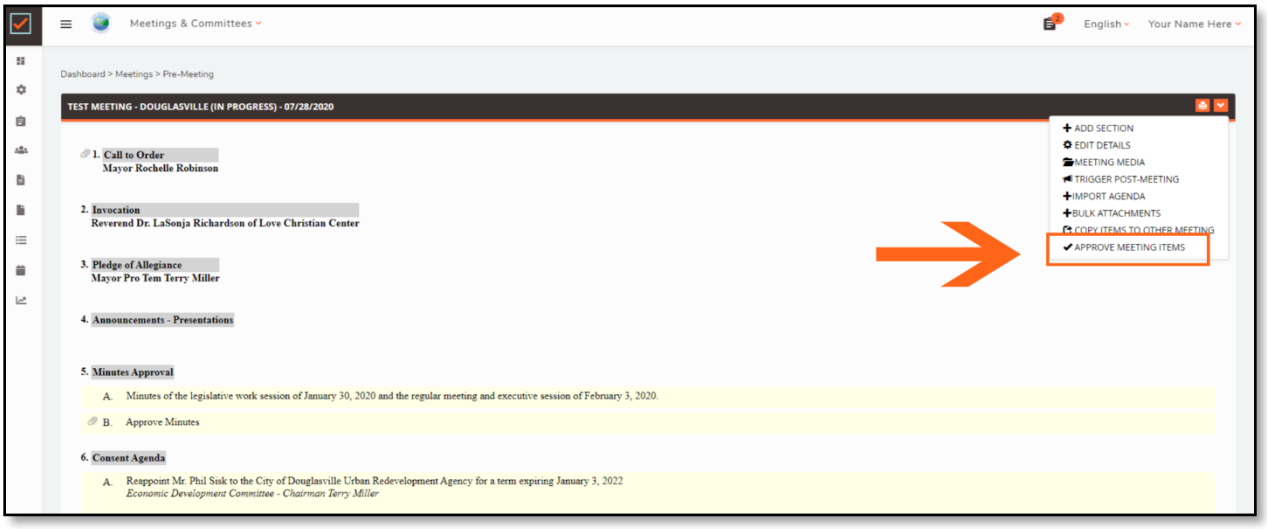
1. Access the pre-meeting area and select the **arrow icon** in the upper right area of the agenda page.
2. Select **Copy Items to Other Meeting** from the menu dropdown.



3. Select **the appropriate values** for the meeting to copy to.
4. Select **the item(s)** to copy
5. Select **Copy** at the bottom of the list.
6. Items will be copied to the selected meeting.

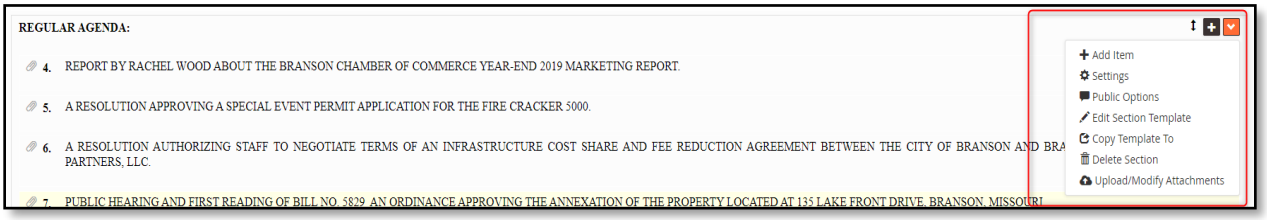


Approve Meeting Items



Managing Agenda Sections

Similar to how the agenda had a dropdown menu with additional options, each section also has a dropdown menu with additional options. Hovering over a section will display the options for the section. This is located in the upper right area of each section within the agenda (highlighted below).



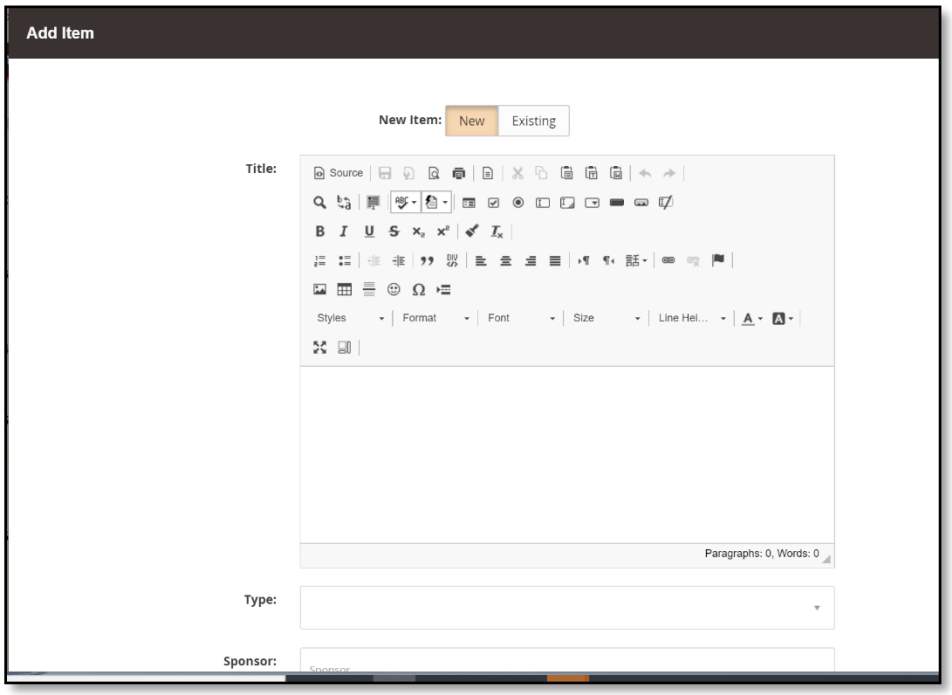
The section dropdown menu is on the far right and is a down arrow icon. The section settings include:

Section Options	Description
Add Item	Enables the user to add items to a section directly. There are two ways to add an item to an agenda, manually under a section and via the document workflow route (see form submittal and completion below).
Settings	Enables the user to make changes to the section title, section numbering and item numbering.
Public Options	Enables the user to control sections and items enabled for public speak and public comment.

Edit Section Template	Enables the user to make section template changes.
Copy Section Template	Enables the user to copy settings made in one section to another section.
Delete Section	Enables the user to delete a section. Edits to a meeting agenda will only change that meeting agenda. The master template is not changed by individual meeting changes.
Upload/Modify Attachments	Enables the user to upload or modify attachments in a section.

To Add Item:

1. First select from **New** or **Existing**.
2. For a New item, fill out the form that appears and save it by selecting **Add Item**.



3. For an Existing Item, select **Existing**. Select the appropriate information to complete the form, then click on **Add Item**.

Settings

Within Settings, it is possible to changes to the section title, section numbering and item numbering. There are other settings here as well that it is recommended you reach out to the main PrimeGov administrator before making changes to the areas not outlined below.

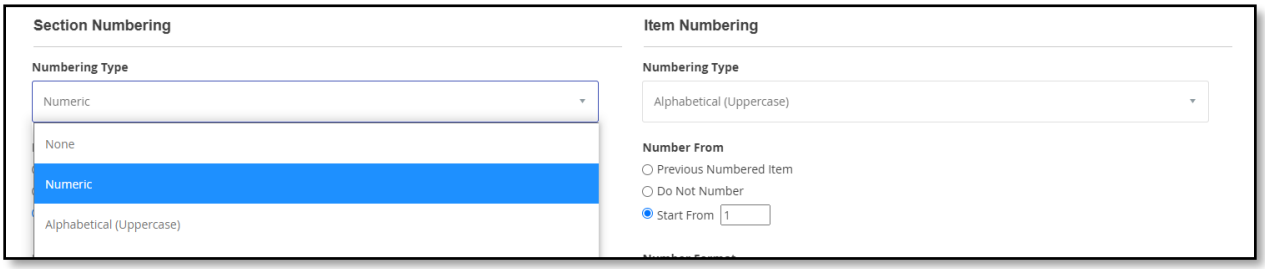
Section Name

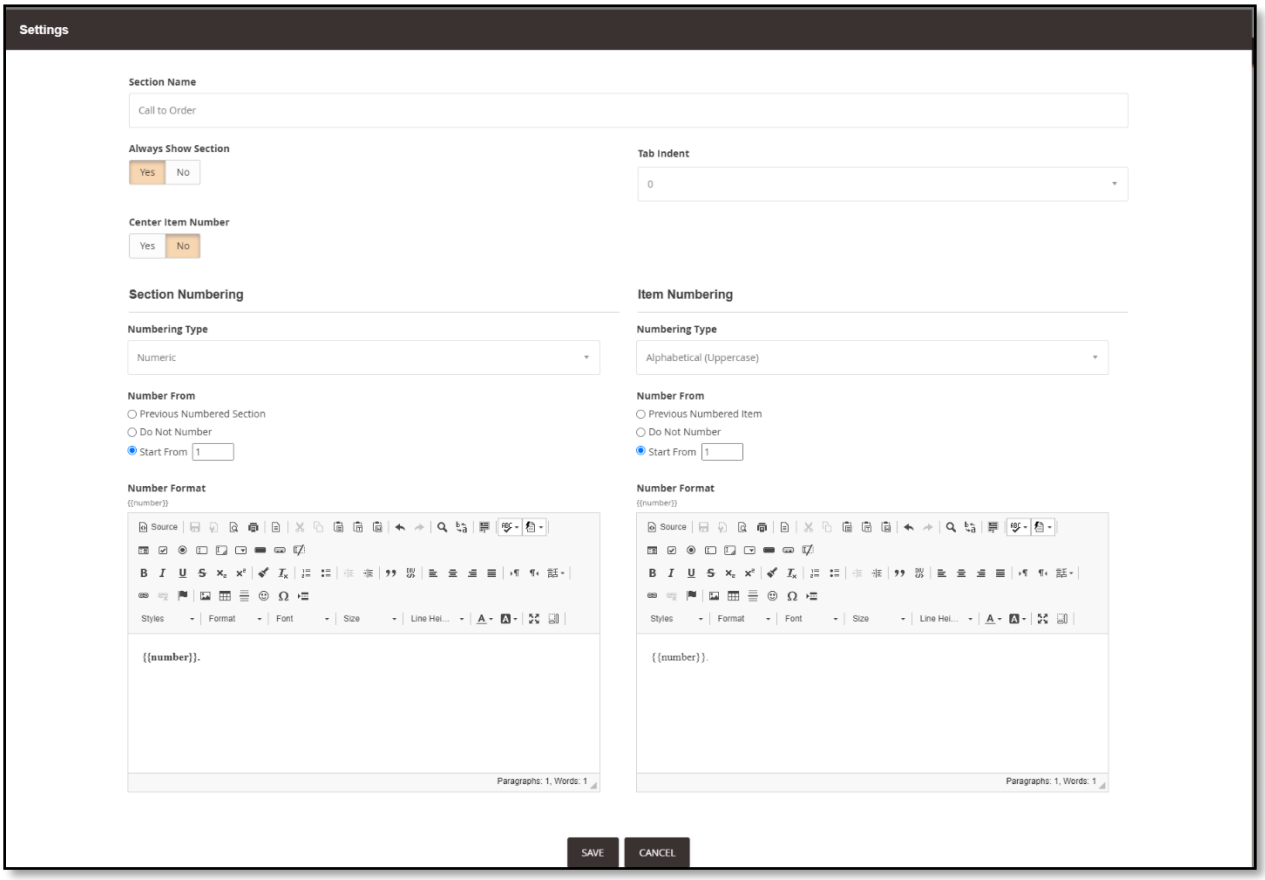
Simply edit the text and Save changes

Section or Item Numbering

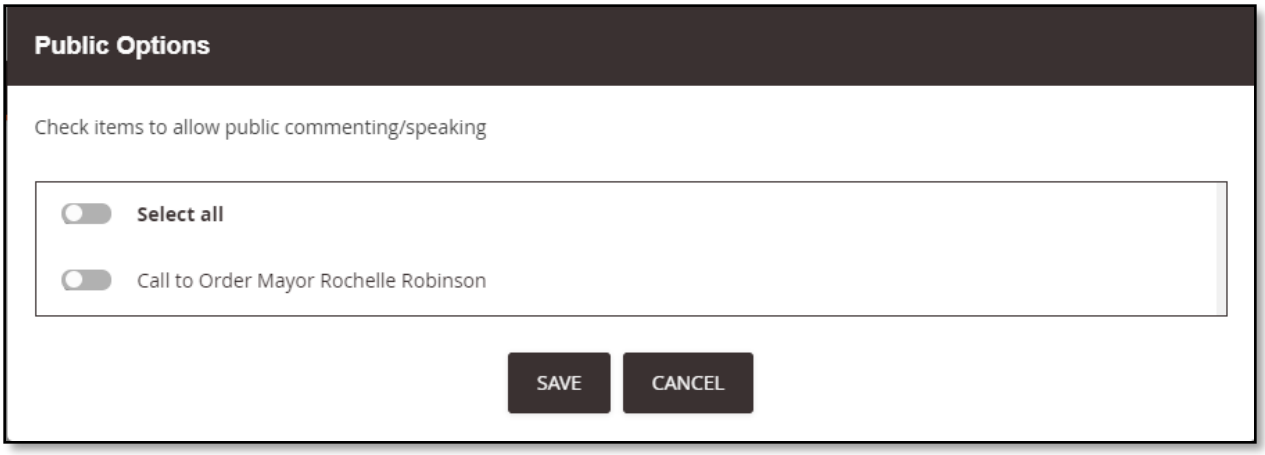
To change the type of numbering, use the dropdown menu to select the type of numbering. The Numbering From selection sets the number or letter that numbering begins on. In most cases numbering will start from 1.

Number Format can be used to change the style or the font of the number/letter used for the numbering either the Section or the item. In many cases there will be a magic code denoted by {{ }}. It is best not to delete or edit this code text; however, the code text may be highlighted to change the font settings if needed.



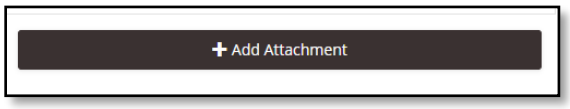


Public Options allows for public comments and speaking to be enabled for all items or for select items. Simply switch on the toggle to enable public comments and speaking. Set the toggle to off to disable.

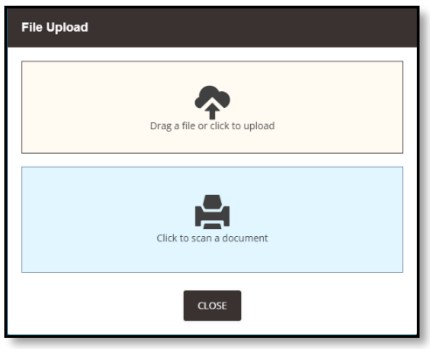


Upload/Modify Attachments is where attachments can be added or removed for the section or item.

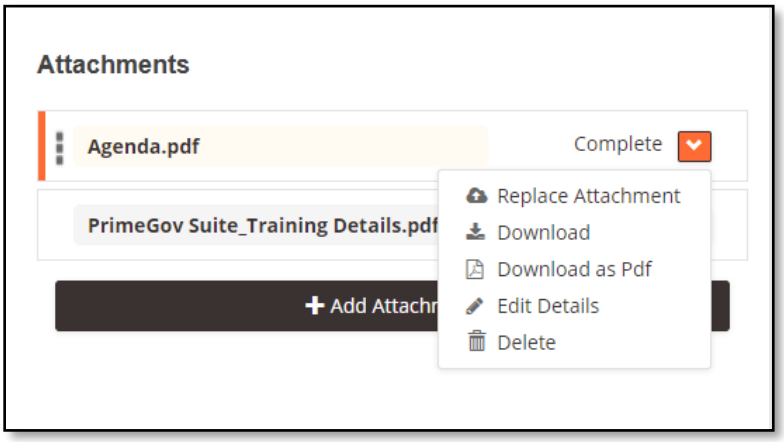
1. To Upload an attachment, click **Add Attachment**.



2. Choose either to scan or upload the file. The file will upload and Save the selected file.

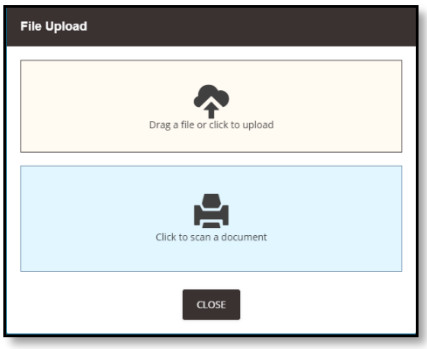


To **Modify**, click the **black drop-down menu** to the right of the attachment name. From here you can Replace Attachment, Download, Download as PDF, Edit Details which will edit the file name, and Delete the attachment.

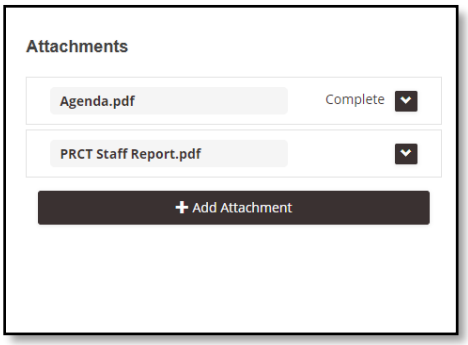


To Replace an Attachment:

1. Click **Replace Attachment**
2. Select Upload or Scan



3. Select the appropriate file. It will be added to the system and accessible on the attachment menu to the right. The previous file will be replaced with the newly added file.



Managing Agenda Items

Similar to how the agenda and sections have dropdown menus with additional options, each item also has a dropdown menu with additional options.



Hovering over an item will display the options for the item. This is in the upper right area of each item within the agenda (highlighted below).



The section dropdown menu is on the far right and is a down arrow icon. The section settings include:

Section Options	Description
Edit Item	Enables the user to make changes to the item including editing the name and details, adding or removing attachments, adding or removing the item from meetings, and viewing the item history including the workflow report.
Download Item (.PDF)	Enables the user to download the Item as a PDF file.
Download Attached Documents (.PDF)	Enables the user to download the Item attachments as a PDF file.
Download Mini-Packet (.PDF)	Enables the user to download the Section Item and the related Staff Report.
Delete Section Item	Enables the user to delete the Section Item, removing from the agenda.
View Workflow Report	Enables the user to see the history of the Item, specifically its progress through the workflow.

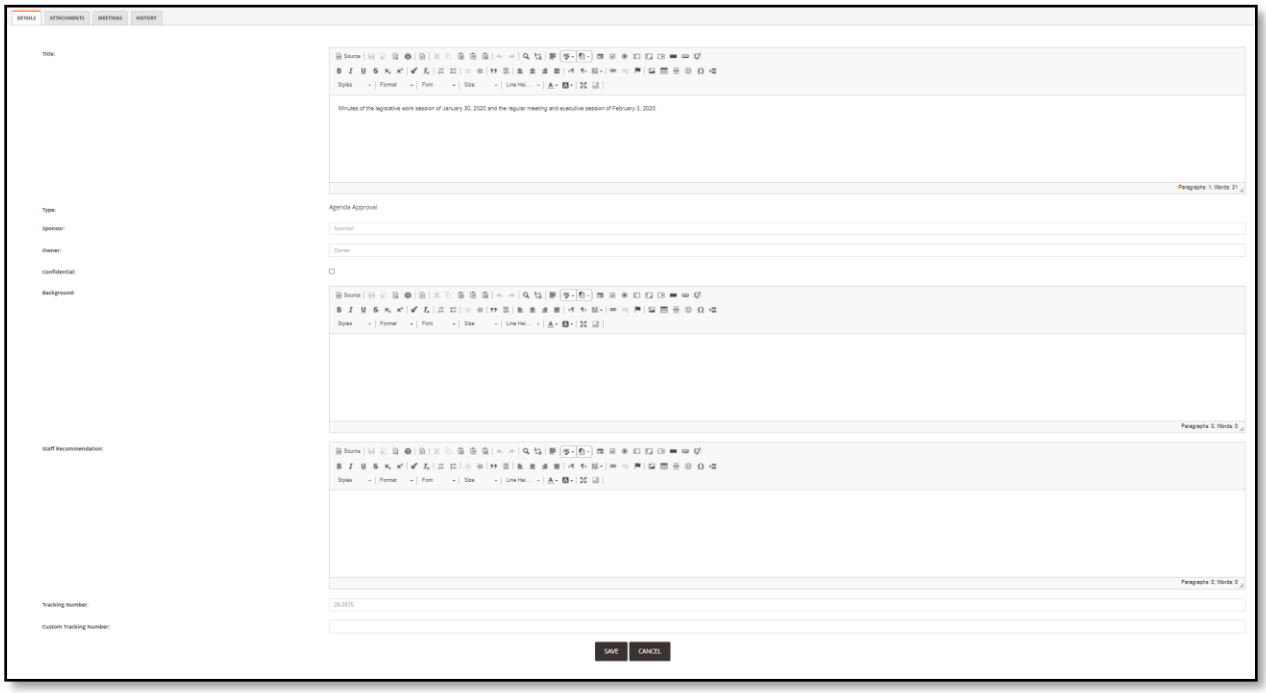
Edit an Item

1. Select **Edit Item** from the Item dropdown menu.
2. To Edit an Item details including title, select **Open Item**. Select the **Details** tab. This will show the details for the item.
3. Next, click on the **pencil icon** in the top left corner.



4. The detail fields are no open for editing purposes. Make edits and click **Save** to confirm.



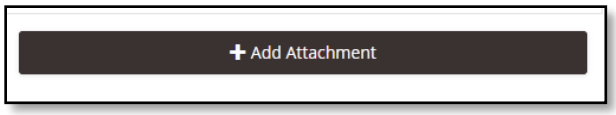


To manage Attachments to an Item:

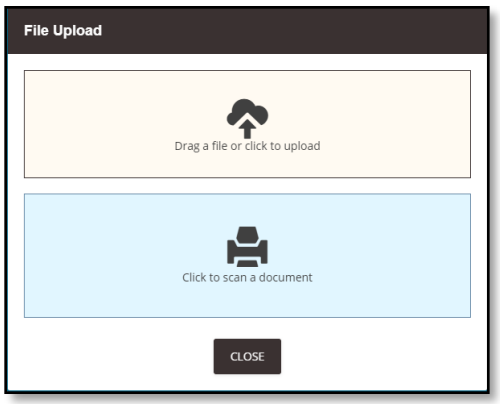
1. Select **Edit Item** from the Item dropdown menu.
2. Navigate to the **Attachments** tab.
3. Use **Add Attachments** to upload attachments, **Download** to download a copy, or **Delete** to remove the attachment.

The Attachments tab is where attachments can be added or removed for the item.

1. To Upload an attachment, click Add Attachment.



2. Choose either to scan or upload the file. The file will upload and Save the selected file.

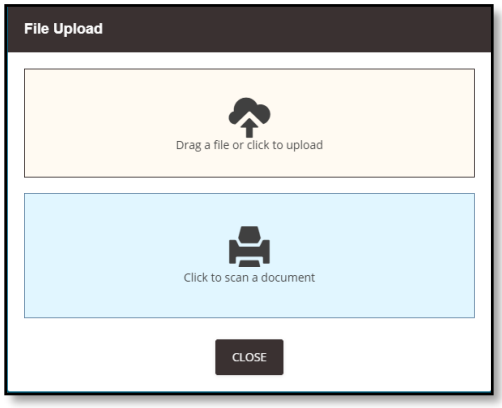


To modify, click the black drop-down menu to the right of the attachment name. From here you can Replace Attachment, Download, Edit Details which will edit the file name, Convert to Document, and Delete the attachment.

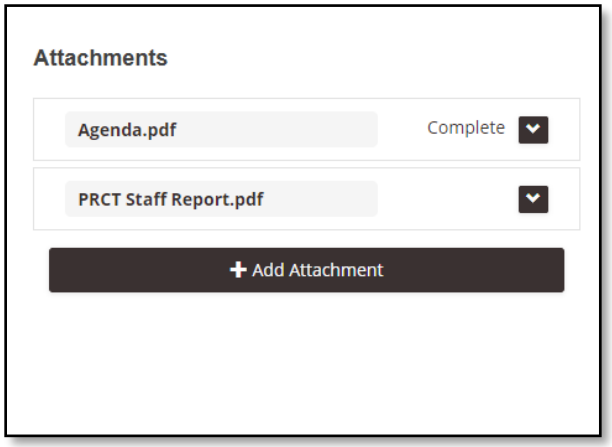


To Replace an Attachment:

1. Click Replace Attachment
2. Select Upload or Scan

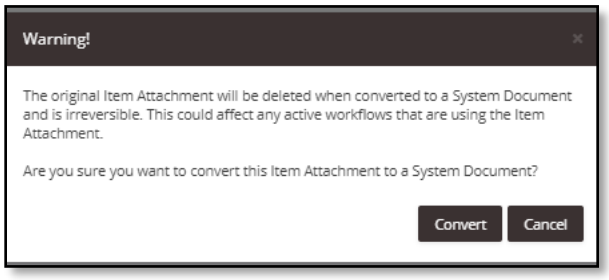


3. Select the appropriate file. It will be added to the system and accessible on the attachment menu to the right. The previous file will be replaced with the newly added file.



To Convert to a Document into a system document:

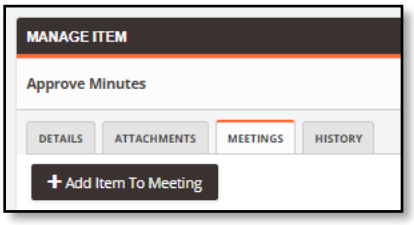
1. Click the black drop-down menu to the right of the attachment name and select Convert to Document. This will convert the attachment into a system document.
2. A warning will pop up to confirm the selection.



3. Click Convert to complete the conversion.
4. The converted file is still available to view and edit under the attachments area on the right side of the screen.

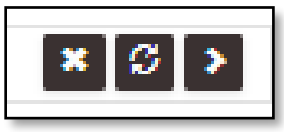
To manage Meetings that an item is assigned to:

1. Select **Edit Item** from the Item dropdown menu.
2. Navigate to the **Meetings** tab.
3. Click Add Item to Meeting to add it to another meeting

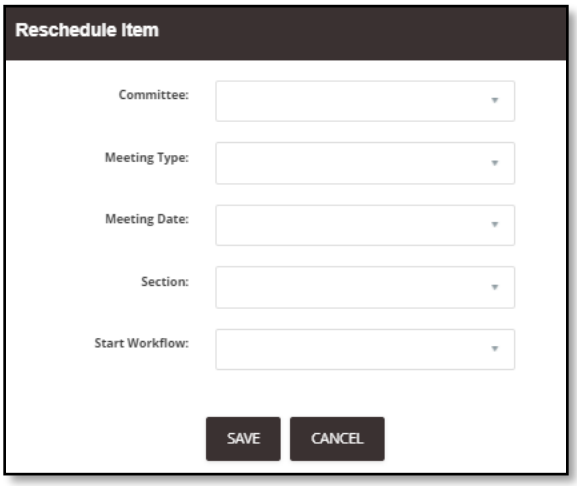


To Reschedule the Item to a different meeting:

1. Select **Edit Item** from the Item dropdown menu.
2. Navigate to the **Meetings** tab.
3. Identify the meeting that the item to which the item is currently assigned
4. Use the menu to the right of the meeting …

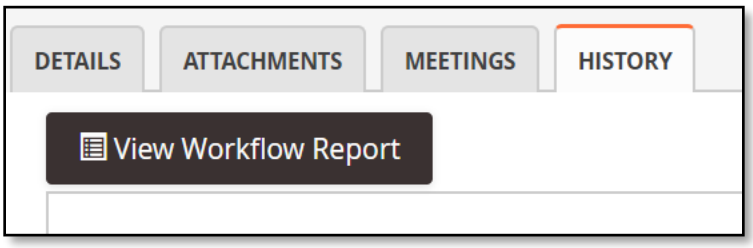


5. Select the **cycle icon** in the middle to reschedule the item. The X icon will delete the item from the current meeting, the > icon will open the current meeting agenda.
6. Fill out the Reschedule Item menu with the appropriate information and click **Save** to complete.



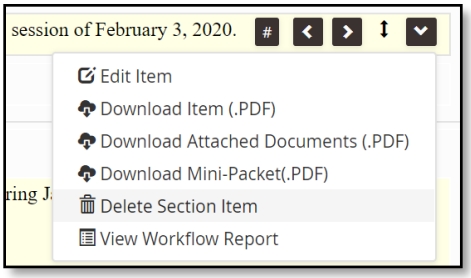
To view the history of an Item:

1. Select **Edit Item** from the Item dropdown menu.
2. Navigate to the **History** tab.
3. Select View Workflow Report to see the workflow history

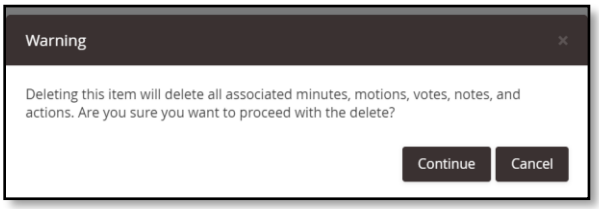


To Delete a Section Item

1. Select the **Delete Section Item** from the Item menu on the right



2. The system will ask you to confirm the action:



3. Click **Continue** to confirm the deletion

Agenda Item Addition & Review

There are two ways to add an item to the agenda:

1. Manually, by clicking the **Add Item** button to the right of each section heading



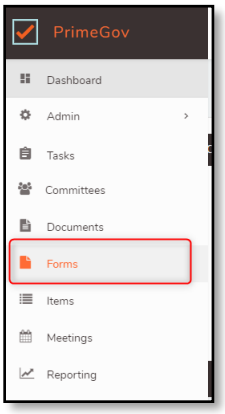
2. Completing and submitting a form which will be subsequently approved for agenda addition through the workflow process. (See Form Completion and Submittal below)

Submitting an Item through a Form

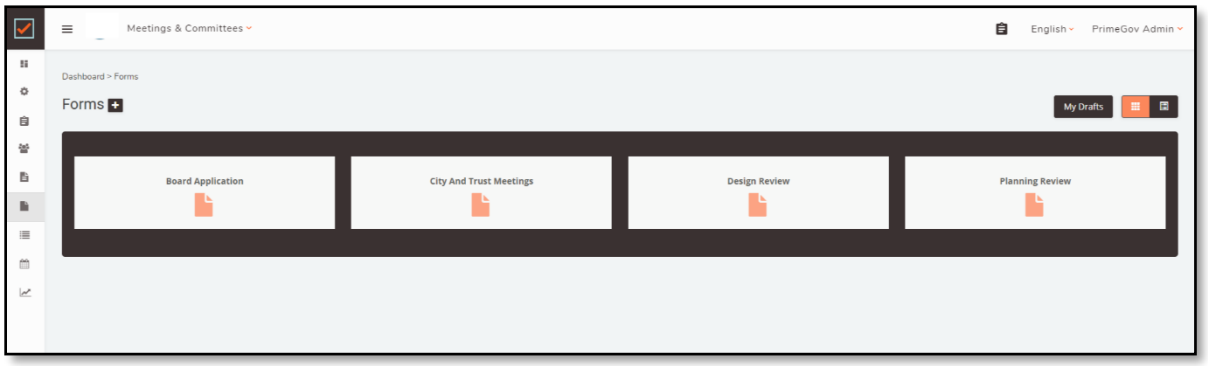
Forms provide the user with an interface to quickly fill information and submit an item for workflow review and approval.

Adding Information to Forms

1. Navigate to forms in the main left side navigation area. Select **Forms**.



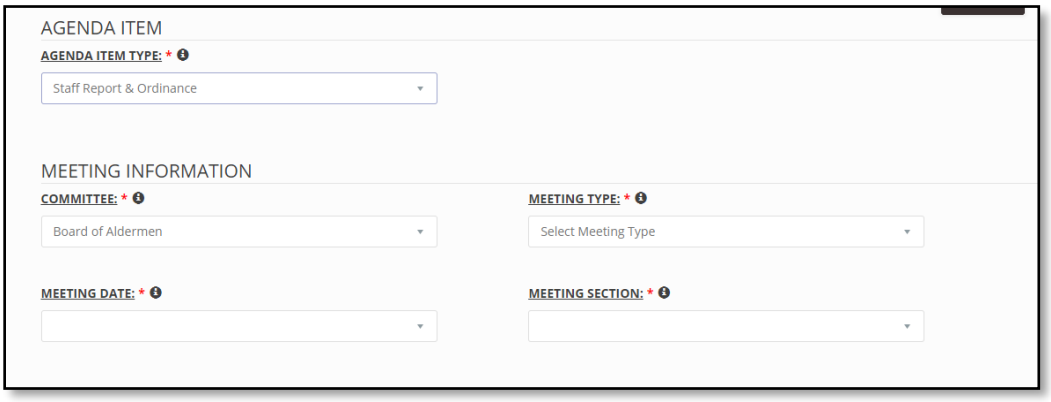
2. The user will be presented with a selection of forms. Each form submitted will go through the specific workflow set up during implementation. **Please note your options may not match the image below.*
3. Select the form



4. The form user interface is built based on the specifications agreed with an implementation consultant during the configuration stage of the project.
5. Fill in the necessary information into each input area.



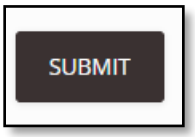
**Please note, each type of form is unique and may not match what you see below.*



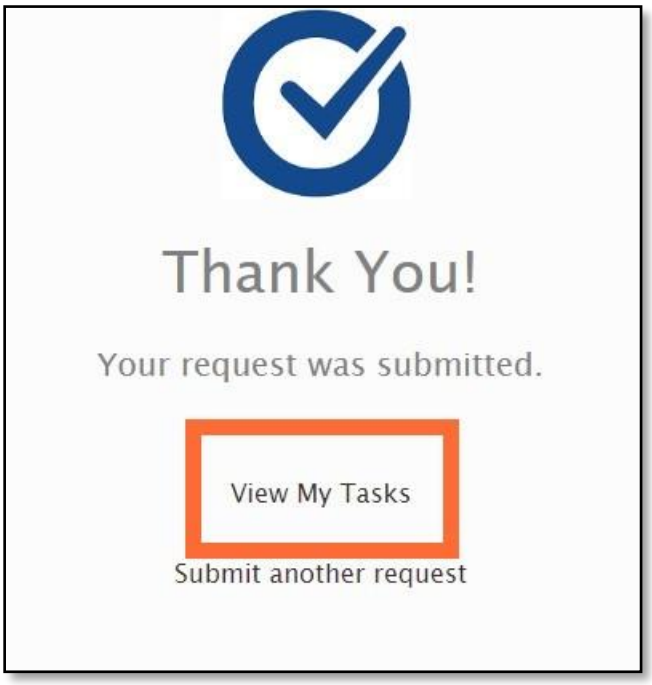
Submitting a Form

Each form submitted creates an Item under the selected agenda.

1. When all entry items are filled select the **Submit** button. This action will generate the staff report.



2. On clicking **Submit** a confirmation screen will appear and the user has the choice submit another form or view their tasks.



3. Select **View My Tasks**



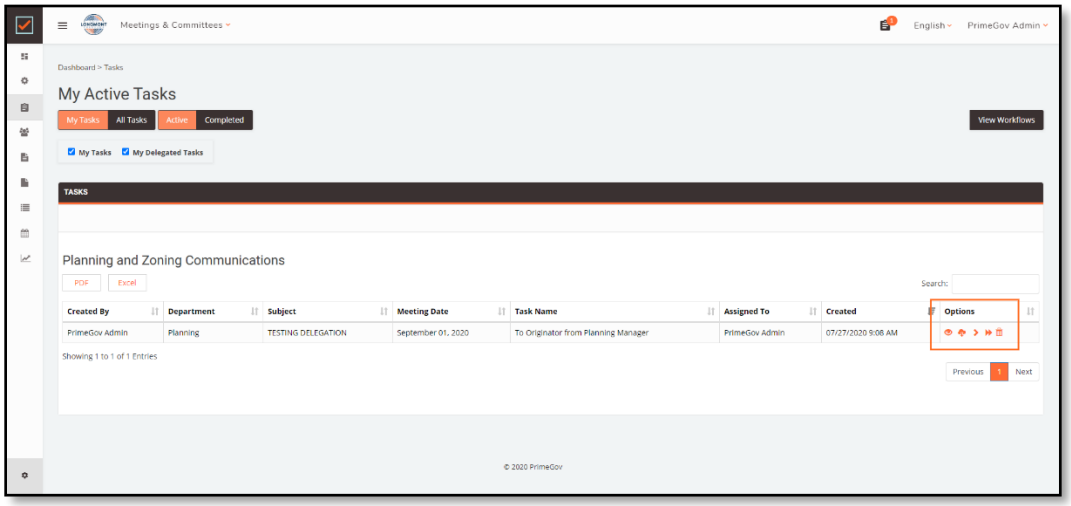
4. The user is taken to the Tasks page. To initiate the first step of the workflow review and approval process called “Originator Review”. This gives the Originator the opportunity to review the information before sending it further in the workflow.

Workflow Reviews & Approval

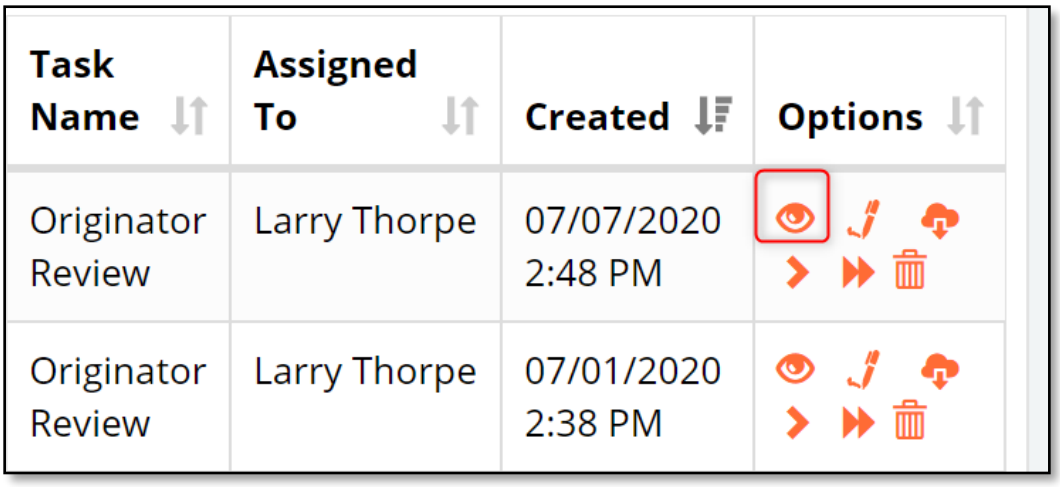
Workflows are configured by a PrimeGov implementation consultant based on the specific workflow process of each client during the configuration phase of an implementation.

Document Review Area

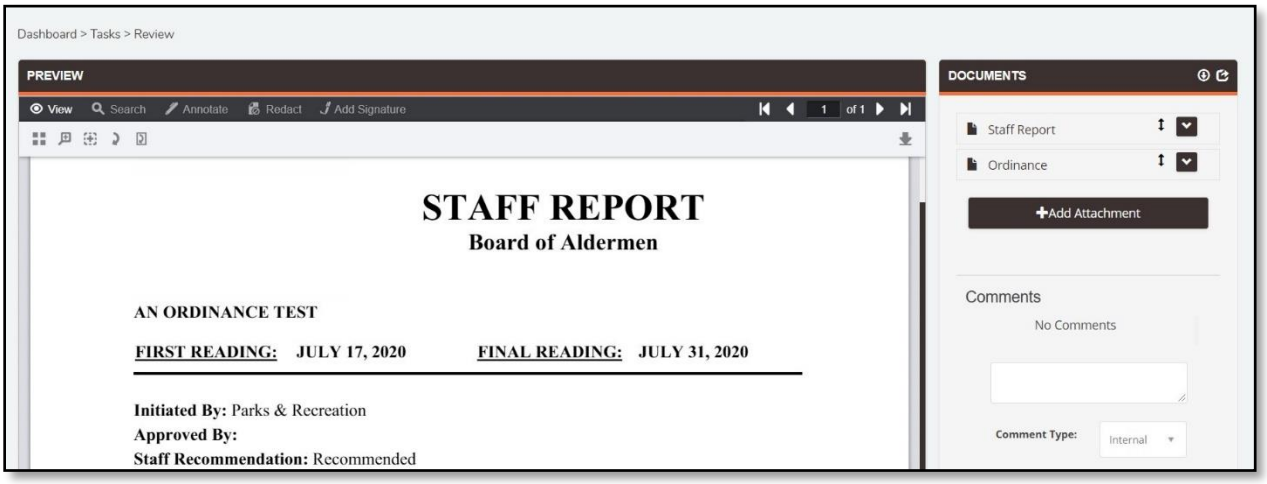
When a form is submitted and the user is viewing **Tasks** (outlined above). Within the “My Tasks” area under the Options column, the user can navigate to the document review area to review open tasks.



1. Select the **Eye Icon** to view the Item task (shown below).



The document review area presents the staff report document with information added during the form completion process. The document review allows the user to:

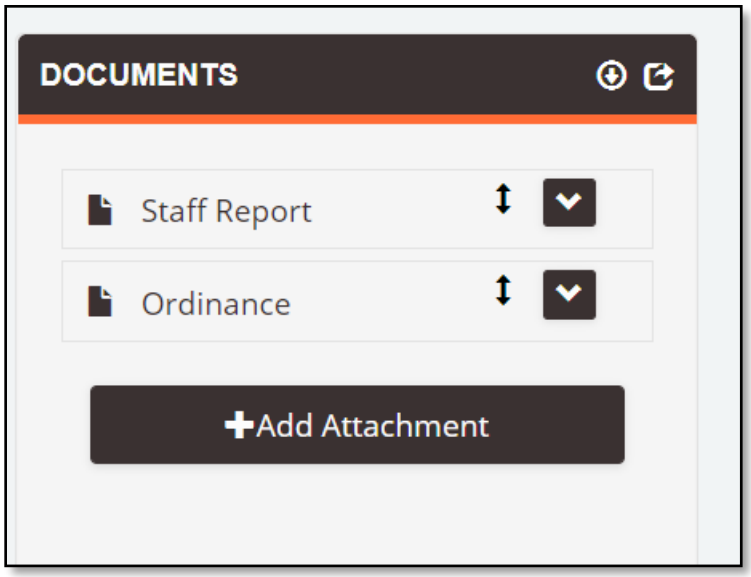


This review stage allows the user to edit, add or remove details and attachments with the item. For more information on the document previewer and options available like search, annotate and redaction, click here.

The left side of the area contains the preview page of the Form. The right side of the area includes the options users have with the form and attachments. This area allows users to download and add attachments, add a comment and manage the next step for the item.

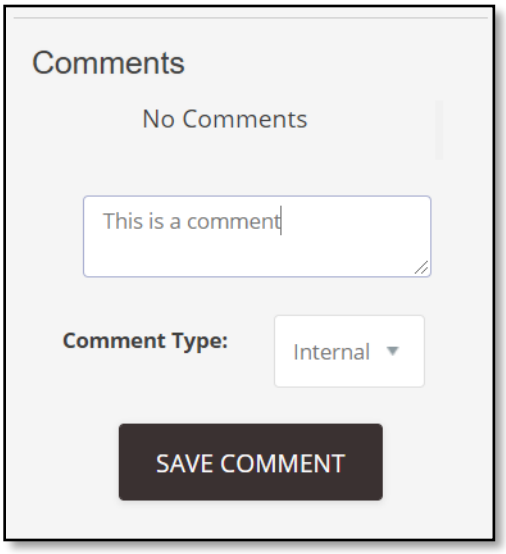
Select **the document** to view it in the preview area on the left.

To add a new attachment select **Add Attachment**, then select **the file(s) to attach**.

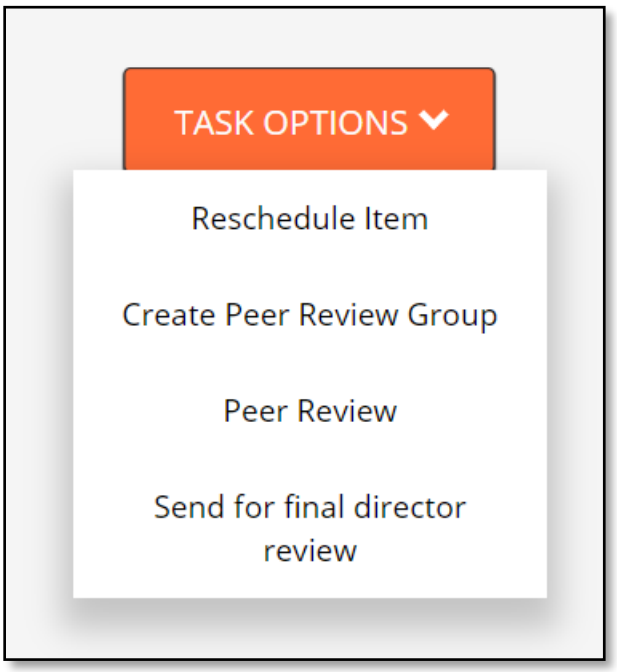


To add a new comment, type the comment in the comment box and select **Save Comment**.

Internal comments are shown to other PrimeGov users during the workflow but are not published to the public. **Private** comments are only visible to you.



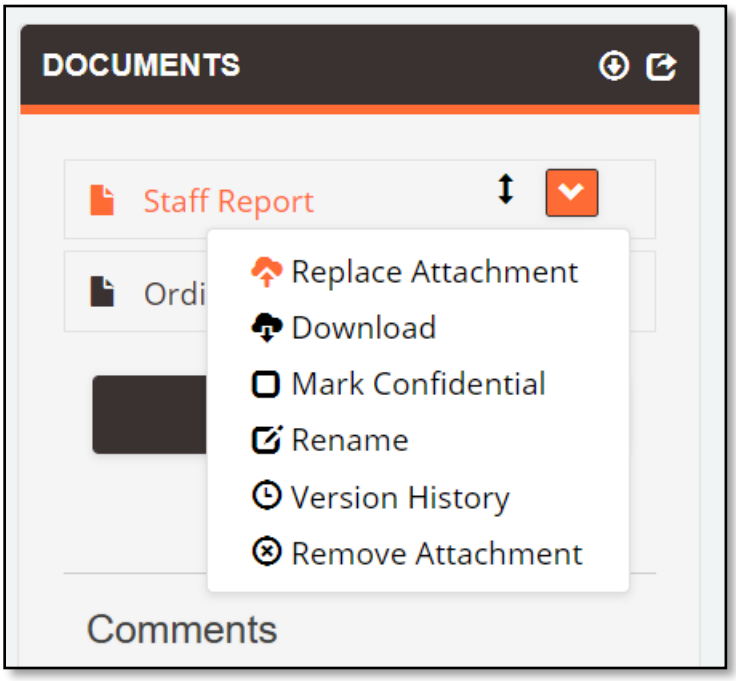
Task Options provides the user with a list of options to forward the document to the next step in the workflow. The options listed are based on the preset workflow steps. * *Please note, you may not see the exact list in the image below.*



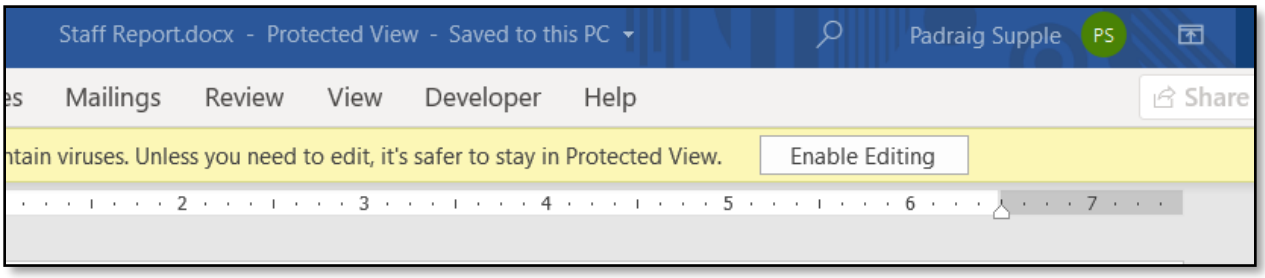
Editing and Uploading the Staff Report from the Review Area

The user can edit the staff report document by completing the following steps:

1. Navigate to the Staff Report label to the right of the document review.
2. Click the **dropdown menu**.



3. Click **Download**.
4. A Word version of the document will become available for download.
5. **Save** the document to a desired location e.g. Desktop
6. **Open** the Word file and click **Enable Editing**.

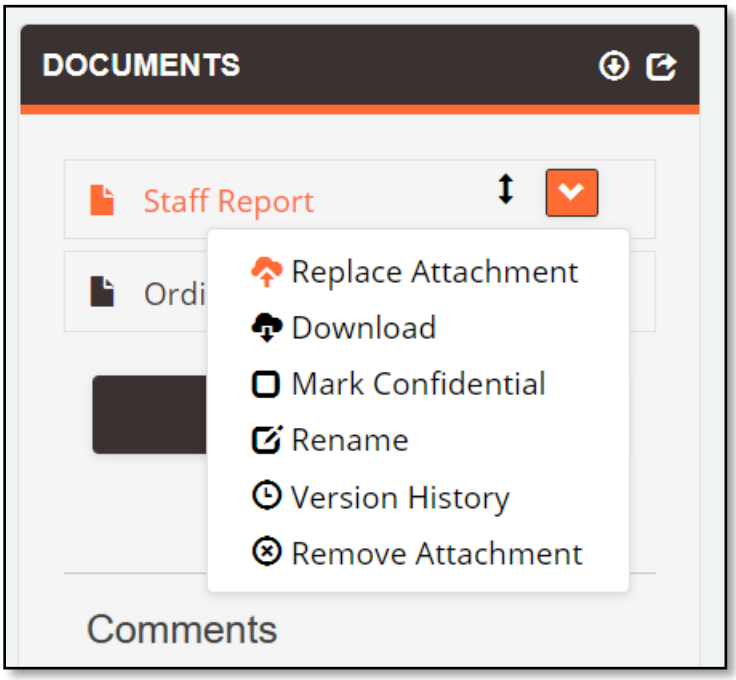


7. Make the required edits to the Microsoft Word document.

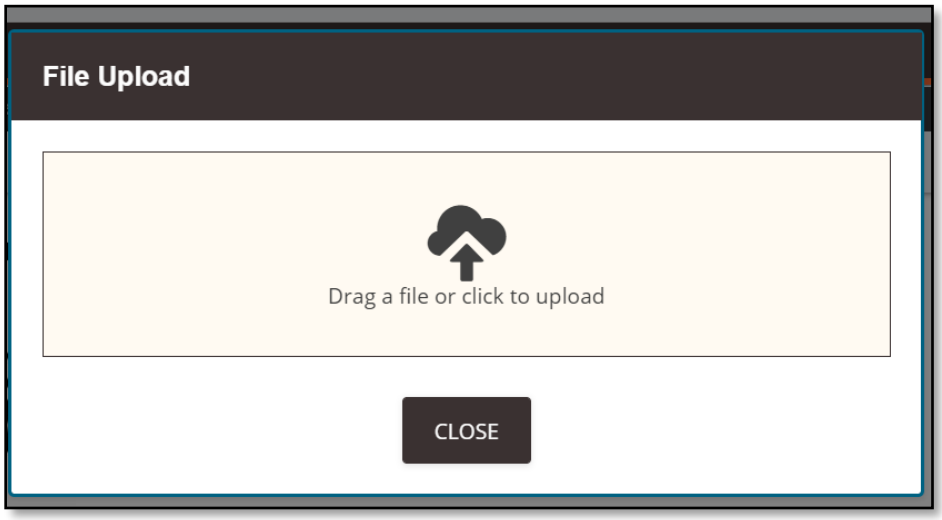
**Please note:: the MS Word document contains content controls which allow for information from the form to display on the document. When making edits to areas of the document, be sure not to delete these content controls.*



8. To upload the edited document, navigate back to the document label to the right of the document name. (shown below).
9. Click the **dropdown menu**



10. Click **Replace Attachment**.
11. A file upload popup window will appear, click on the image to upload the edited document.

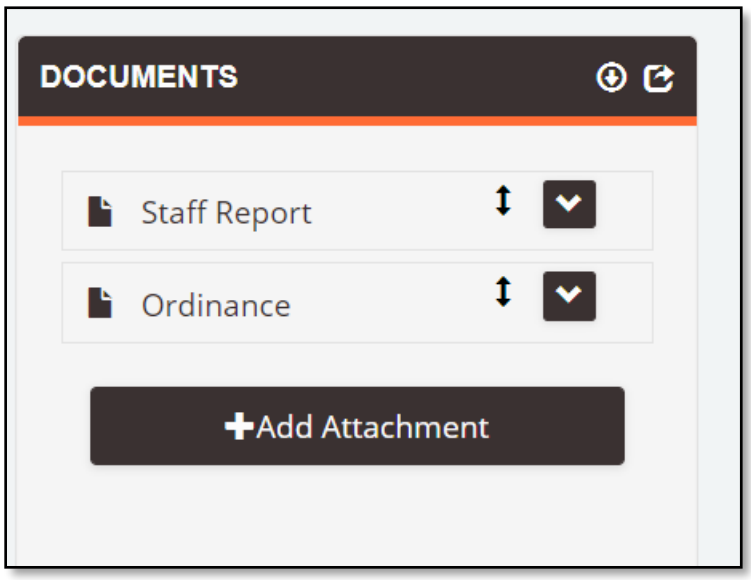


12. The edited document will now display in the document review area.

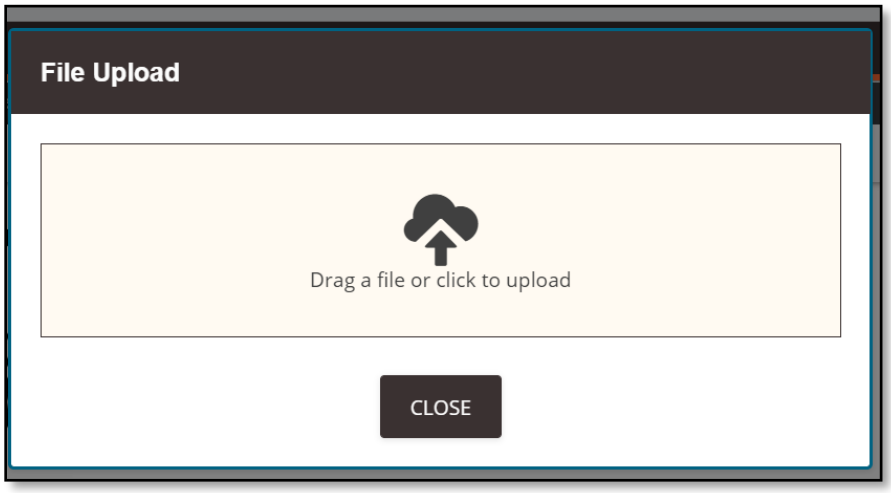
Adding Attachments

Attachments can be added as part of the item going through a workflow. To add an attachment:

1. Click the **Add Attachment** button



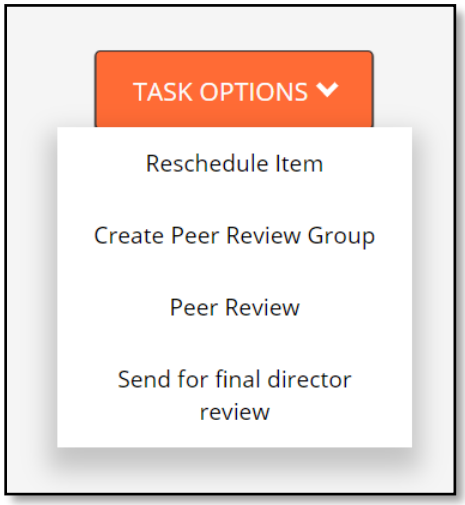
2. A file upload popup window will appear, click on the **image to upload** an attachment.



Task Options

The task options area provides the user with a list of options to the user. Each option or step represents the next step in the workflow. The options a user will see are based on the workflow steps agreed with the implementation consultant during the configuration phase of the project.

1. Click on the **Task Options** dropdown.



2. Select **the relevant task** to send the documents (Staff Report and Attachments) through to the next step. Users with the corresponding group assignments will receive item documents in their task dashboards.
3. The final step in Task options for item documents is Approval. Once **Approve** is clicked the item will appear in the Pre-Meeting area and no longer be available in the Tasks Dashboard

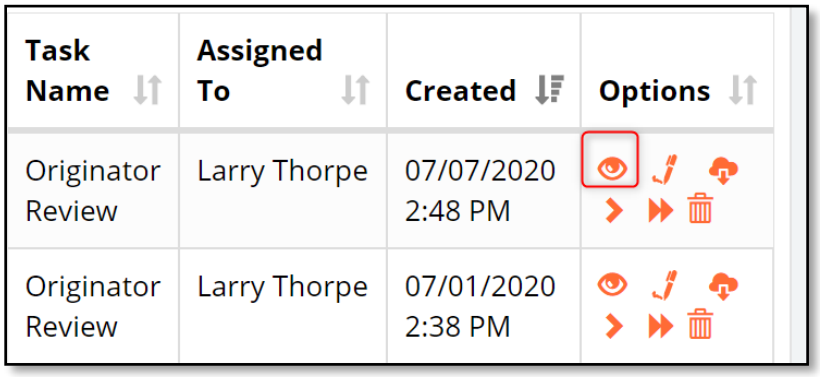
Tasks Dashboard

The Tasks Dashboard gives users an overview of Agenda Items assigned to them (My Tasks) and Agenda Items assigned to others (All Tasks). **Please note Options are customized. Some options below may not be available to every user.*

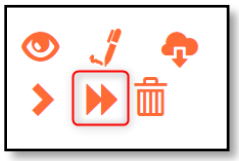
1. Click on the **clipboard icon** to quickly access the tasks dashboard



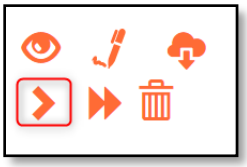
2. To view and items click on the **Open Task** icon.



3. The user can also move the item along in the workflow without viewing by clicking the **Quick Route Task** icon.



4. The user can view previous workflow tasks by clicking the **View workflow tasks** icon.



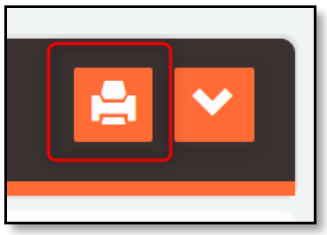
5. The user can delete the item from the workflow area by clicking the **Delete workflow** icon.



Agenda Compilation & Publishing

When the agenda is ready for compilation and publishing the user will navigate to the Compile & Publish page. To compile the agenda:

1. From the Pre-meeting area, navigate to the meeting media print icon in the upper right area of the page.



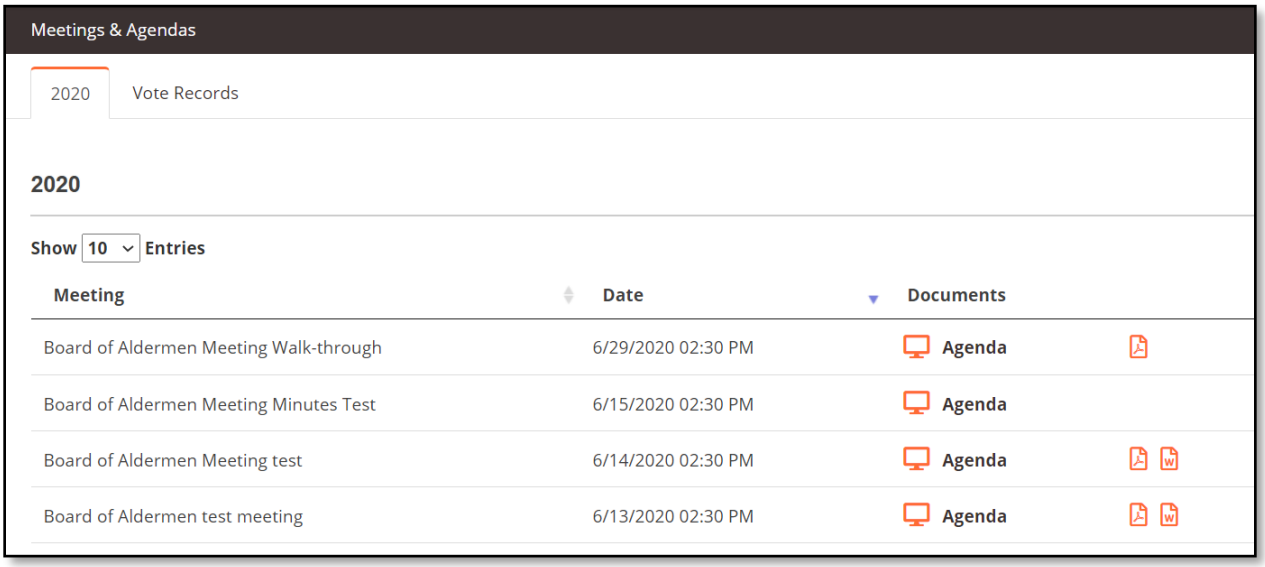
2. The user will be taken to the meeting media page.
3. Under the agenda area click the **Compile All** icon.
4. The agenda will compile in the formats available.



5. To view the compiled agenda, click on one of the three options for **HTML, Word,** or **PDF**.
6. The agenda can be compiled as many times as the user requires. If changes need to be made to the agenda, navigate to the Pre-meeting area and make the updates. Repeat the Compile steps to update the compiled documents.
7. To publicly publish the agenda, click the **Publish Public** icon.



8. The published agenda will now appear in the Public Portal area of the PrimeGov application.


Meetings & Agendas
2020
Vote Records
2020
Show 10 Entries
Meeting
Date
Documents
Board of Aldermen Meeting Walk-through
6/29/2020 02:30 PM
Agenda
Board of Aldermen Meeting Minutes Test
6/15/2020 02:30 PM
Agenda
Board of Aldermen Meeting test
6/14/2020 02:30 PM
Agenda
Board of Aldermen test meeting
6/13/2020 02:30 PM
Agenda

In-Meeting Process

When the day of the meeting arrives, the Clerk will utilize the **PrimeGov Live Meeting** area to control and record actions during the meeting. The Live Meeting area is a separate area than where tasks and workflows are managed.

The In-Meeting process in PrimeGov includes the following actions:

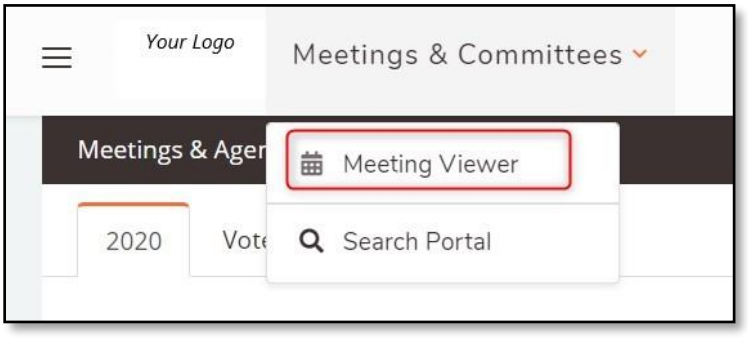
1. **Starting the meeting**
2. **Taking Roll Call**
3. **Managing Speakers**
4. **Taking Minutes, Motions and Votes**
5. **Ending the meeting**

Accessing Live Meeting

*To access the Live Meeting area you will select the dropdown under **Meetings and Committees**.*

The following instructions are intended for meeting clerks or those managing the live meeting.

2. To access the **Live Meeting** area, navigate to the organization's PrimeGov site.
3. Select the dropdown under **Meetings and Committees** and select **Meeting Viewer** (shown below).



4. A **login window** will be presented to the user – login with your **PrimeGov credentials**.
5. A list of upcoming meetings will be listed. Select the desired upcoming meeting.

6. The **Live Meeting** area will load after the meeting is selected from the list. The agenda prepared in the Pre-Meeting area will be shown.

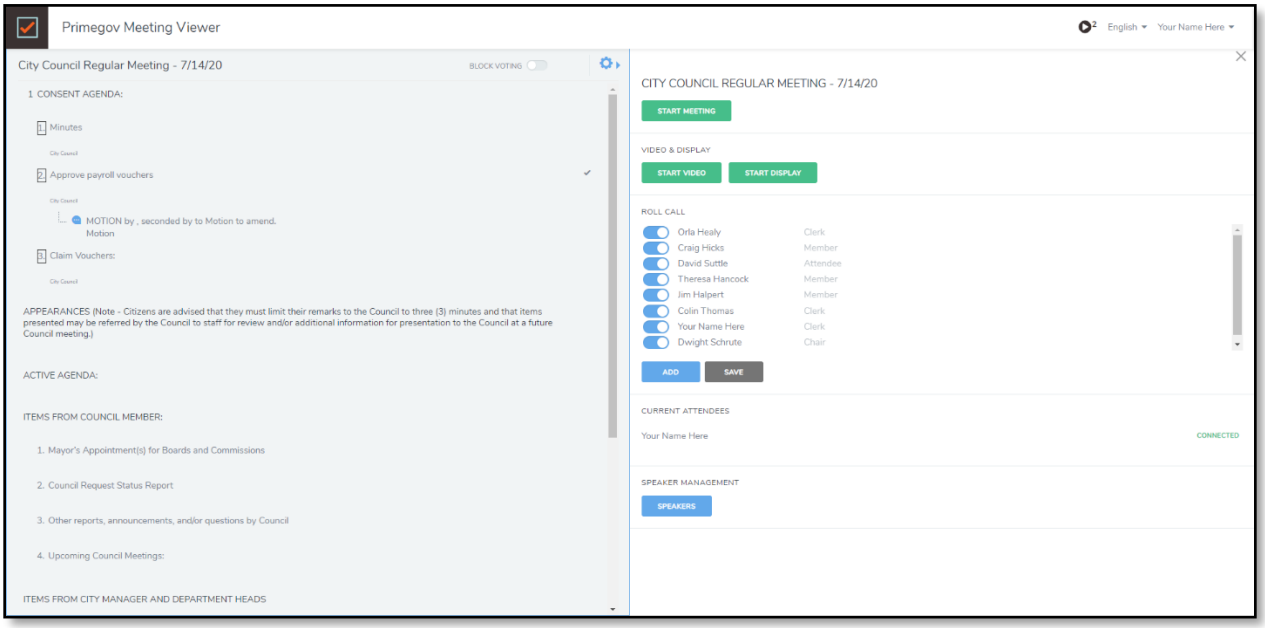


7. Click on the **cog wheel icon** in the upper right area of the screen. This will open another section of the screen on the right side of the page where you manage starting the meeting, roll call and speakers.



Don’t See the Cog Wheel?

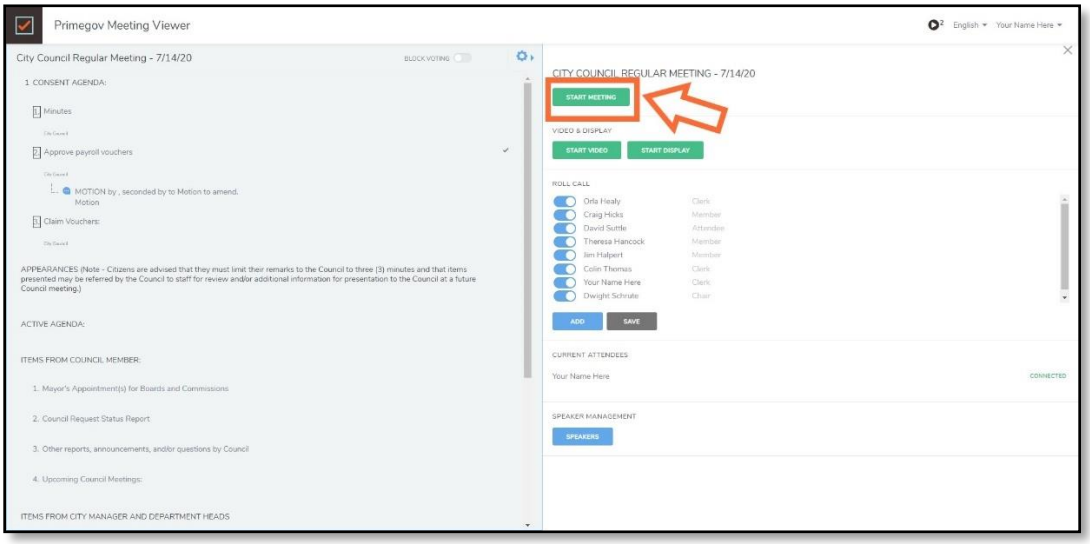
Users must be assigned as a clerk of the meeting to see this cog wheel. Head to **Pre-meeting > Edit Details > Roles** to adjust user access.



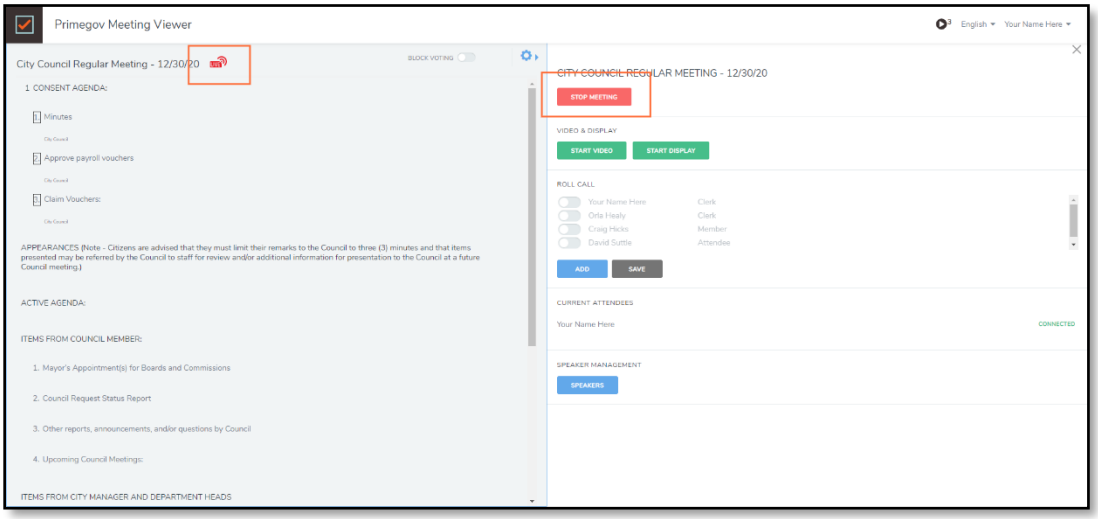
Starting a Live Meeting

The left side of the screen will show the agenda, allowing you to easily navigate and activate live items for discussion. The right side is where you will do most of the ‘work’ like starting the meeting, taking roll, and managing minutes and voting

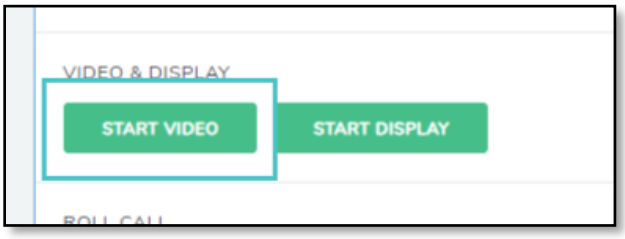
1. When ready to begin the meeting select the **Start Meeting** button. This will show the meeting has started in the Public Portal and you will see a live icon next to the meeting name on the left side of the screen.



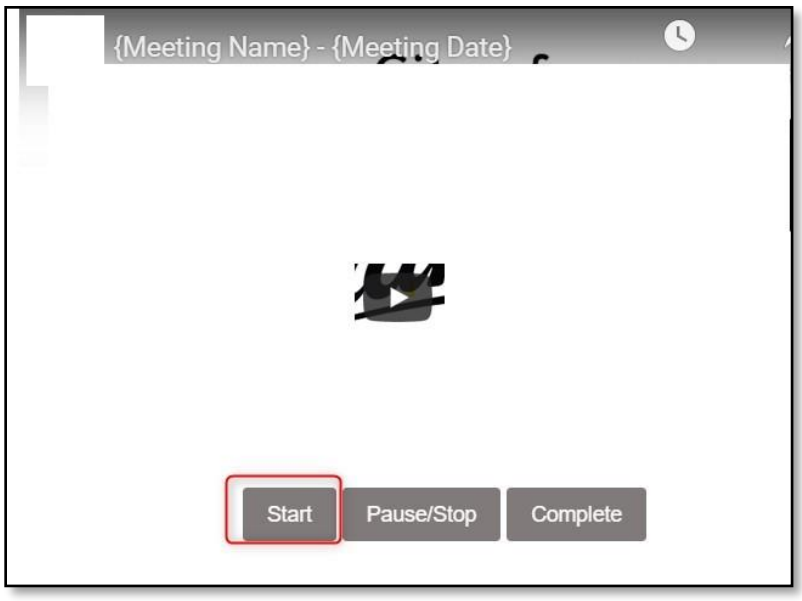
After selecting **Start Meeting**:



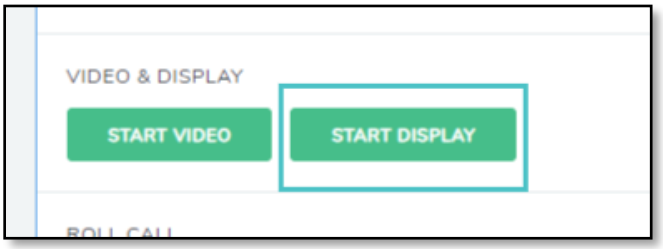
2. To start the meeting video click **Start Video** – this will open a separate window or pop-up. Locate that pop-up window.



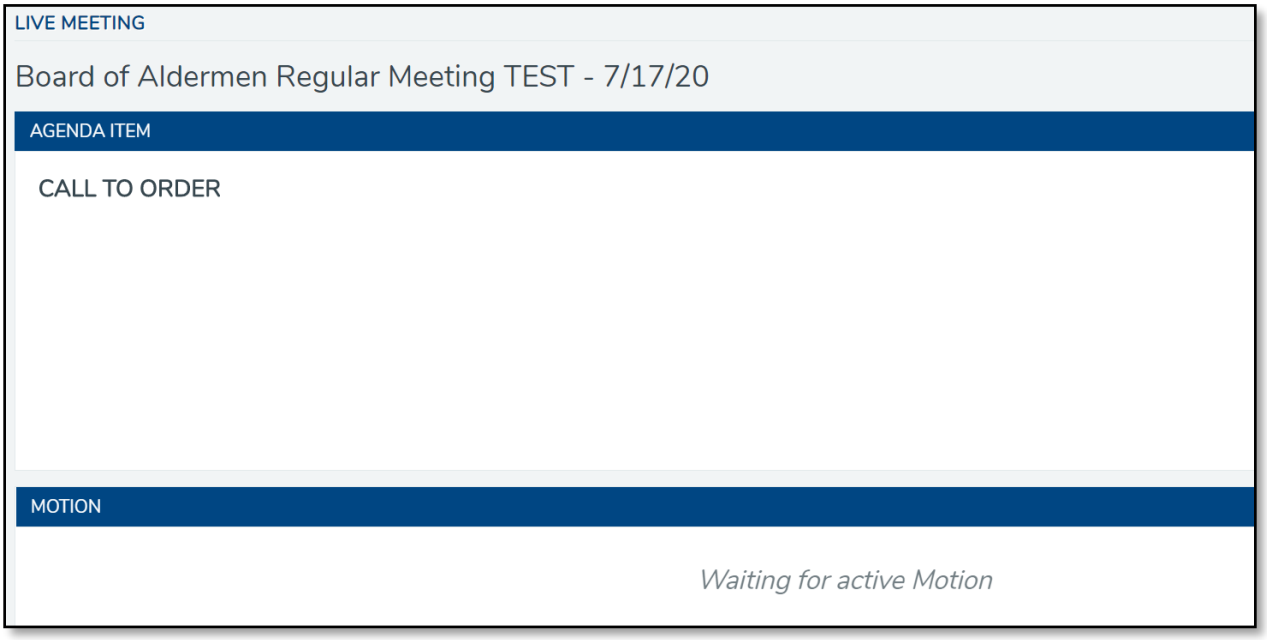
3. Select **Start** in that pop up (shown below). This will begin the live streaming of the meeting to YouTube. Keep this open and **navigate back to** the previous window with the agenda and **Live Meeting** management area.



4 Select the **Start Display** button to allow the public to see active items. Selecting the Start Display button will open another window with a link that has the public display. The URL in the new browser window can be shared to display on a separate chamber screen. The window will display items activated by the Clerk and additional details like motions and voting results.



Example of Live Display to the Public*:



The Live Display is dynamic and will change with the meeting management by the Clerk.

> **Please note, each live display is configured and customized for each client. What is displayed above may not be an exact match to your organization's version.*

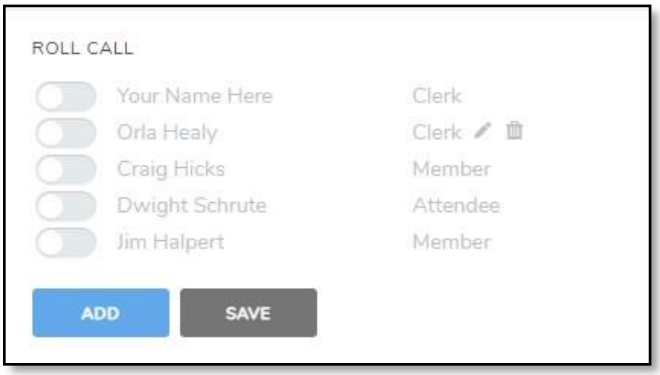
At this point you are ready to get started. The meeting is streaming live on the Public Portal, YouTube site and the activated items will show to the public.

Taking Roll Call

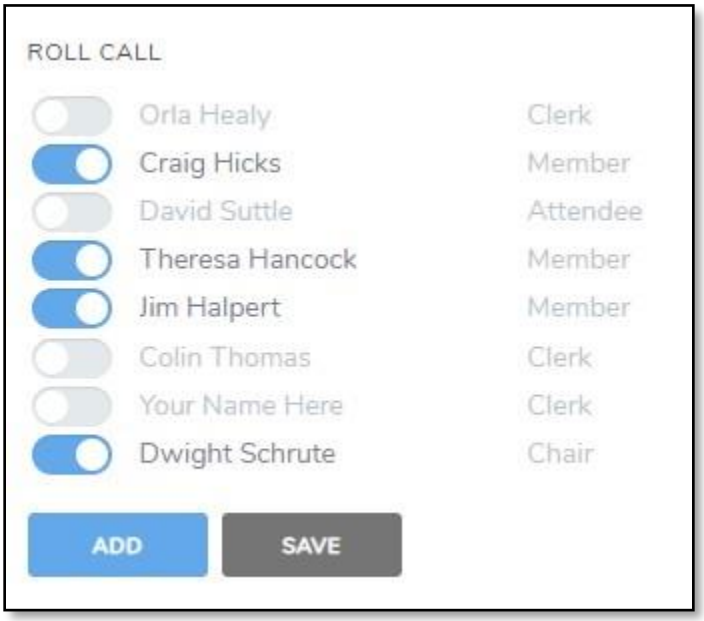
You will see a list of users added to the meeting under **Roll Call**. This is accessed through the settings icon in the upper right area of the agenda.

Is someone missing from the list?
Select **Add** to select them from the user list.

Does someone need to be deleted or edited?
Hover over the names and select the **edit icon** or **trash can** to take action on that user.



1. To take the meeting **Roll Call**, select the **toggle buttons** to the left of member names for members who are present. Member's marked present will show blue in the toggle.



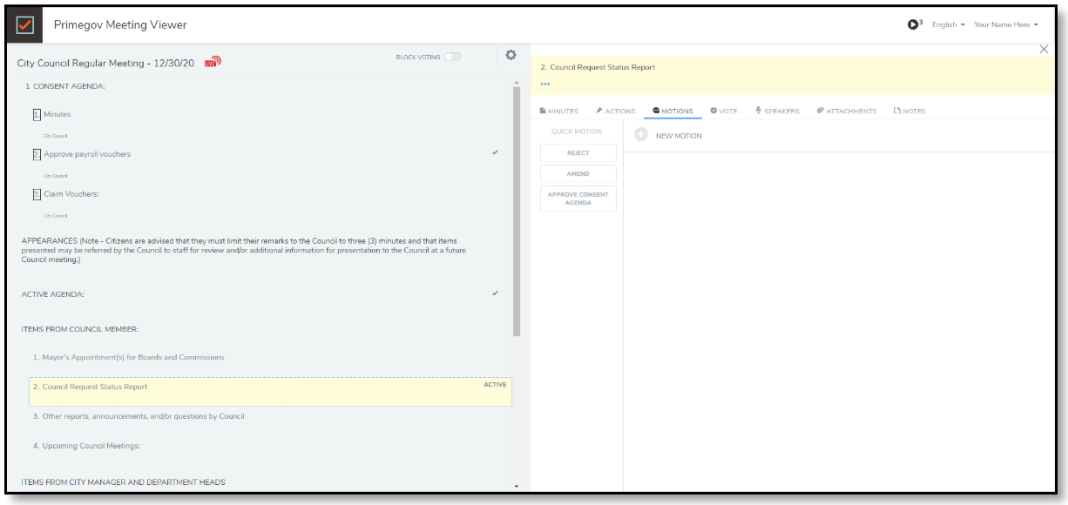
2. Select **Save.** Roll has now been taken and recorded.

Activating Items

Each **Item** on the agenda (left side of the screen) can be activated to become an *Active Item.* An Active Item means that item information is displayed to the public in the Live Meeting display. Double click an item to activate it. The item will be highlighted yellow when active. Double click another item to deactivate the current item and to activate the next item. The right side of the screen will show actions available for the selected item.

Double click an Item to activate it – the item will turn light yellow when active (shown below).



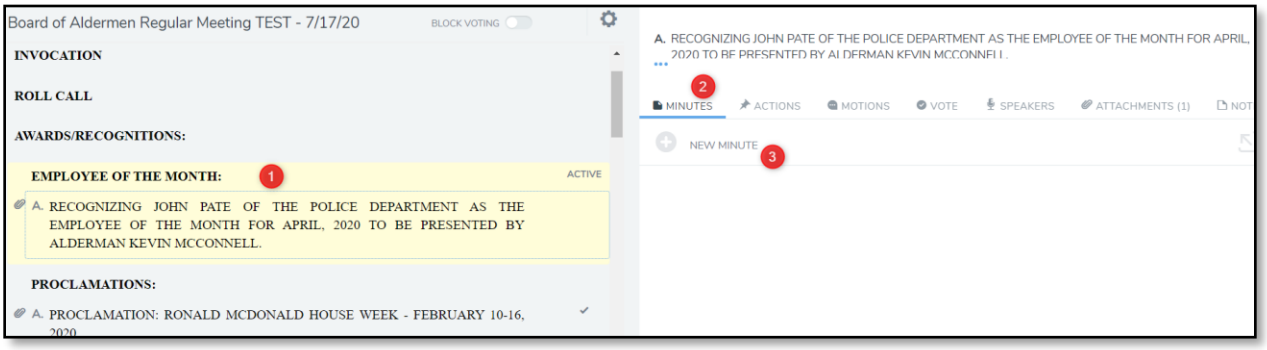


- Active Items will display currently under discussion to members of the meeting.
- **Active Items are timestamped at the time of double click to align the discussion time with video time.**
- Active Items will display in the meeting display screen to allow the public to see what item is currently under discussion.

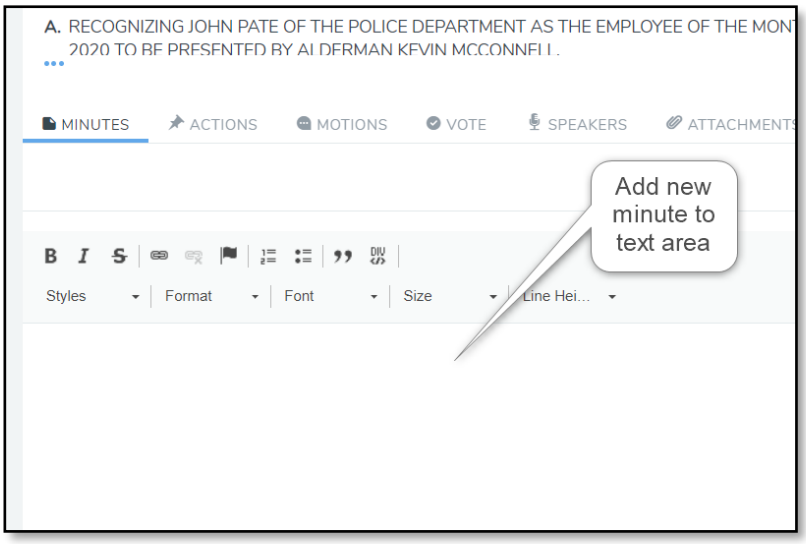
Adding Minutes During the Meeting

To add minutes to an Item:

1. Click on **the Item** on the left side of the screen
2. Navigate to the **Minutes area** on the right
3. Select **New Minute**



4. Type the minute text

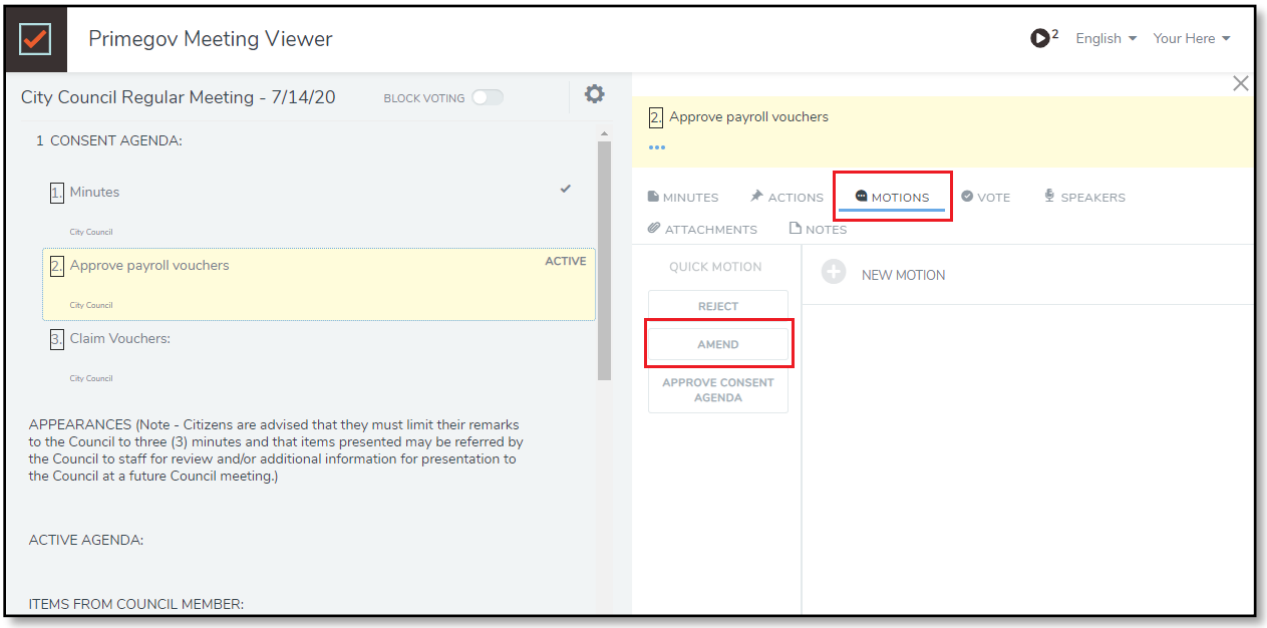


5. Select **Save**

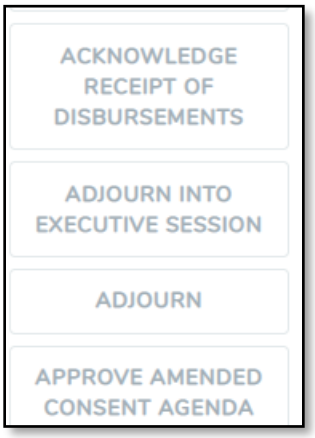
Adding Motions

Motions can be added in two ways:

1. **Quick Motions**. An agreed upon set of motion language that can be quickly associated with specific items. This is set at the Admin level.
2. **New motions** which can be created in the meeting area for ad hoc moments.



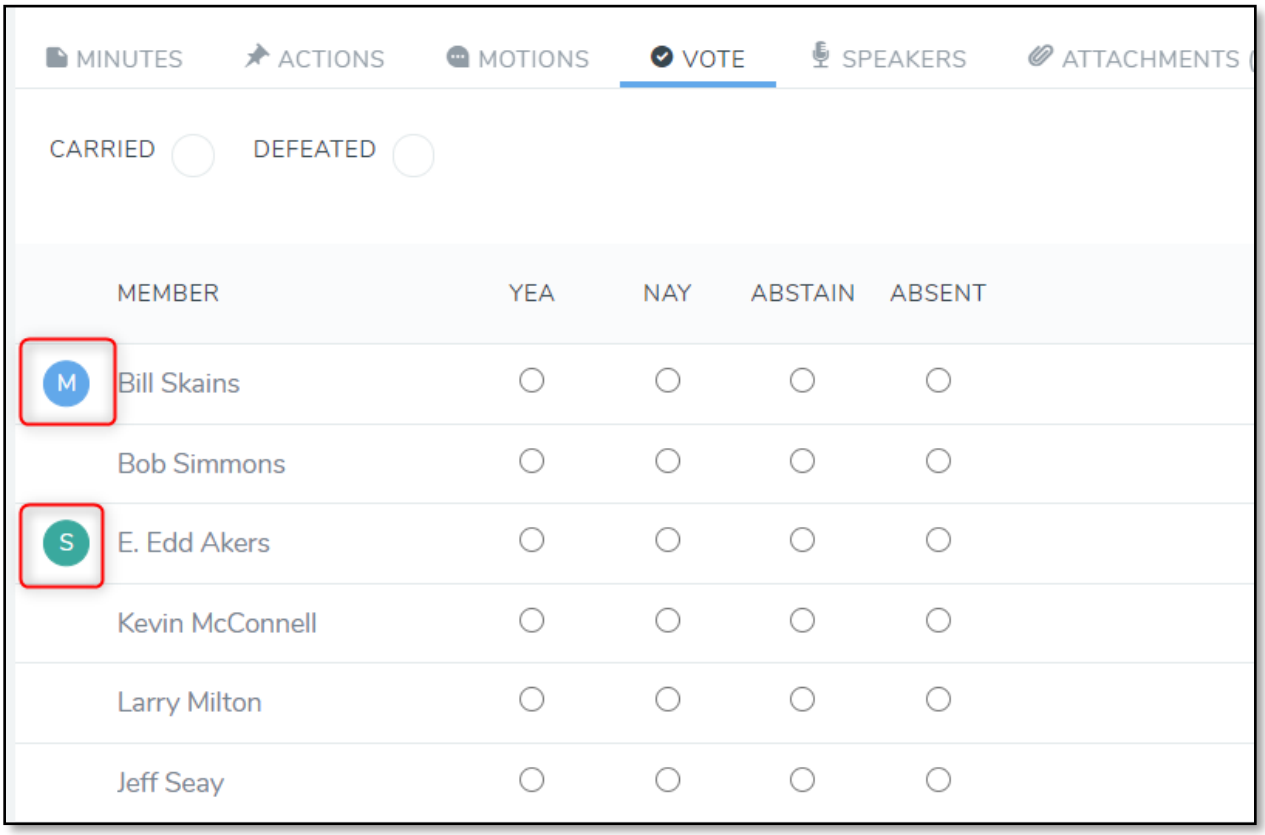
a. To add a Quick Motion, **activate the item** (by double clicking- the item turns yellow). Make sure you are on the Motions tab and then select **the quick motion** from the Quick Motion area.



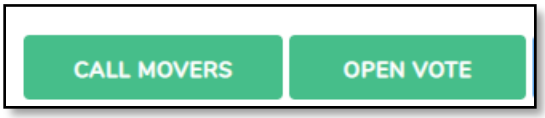
Taking Votes

Once a motion is ready for voting, select the **Vote tab** to designated movers, seconders and to recording voting results.

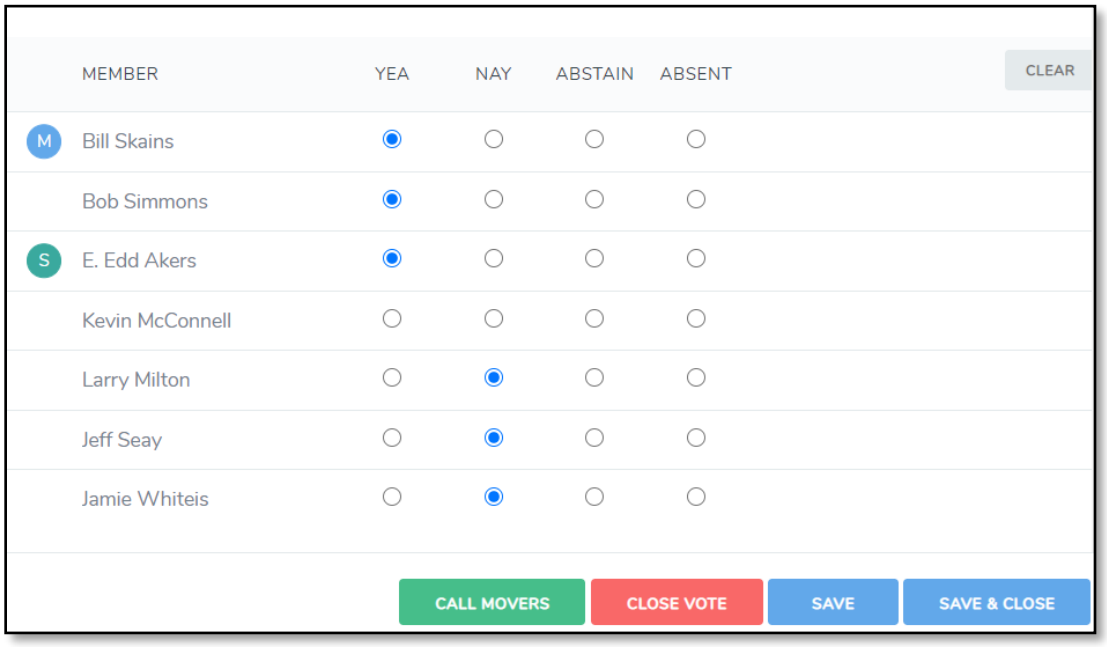
Movers can be assigned by the Clerk by manually selecting the Mover (designated with an **M**) and Seconder (designated with an **S**) options (shown below).



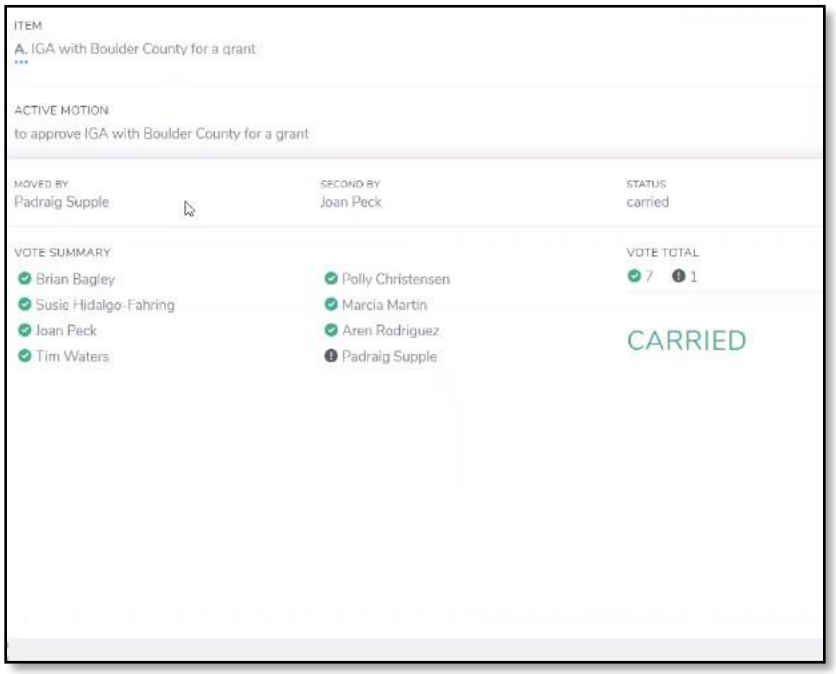
a. Alternatively, the Clerk can also select the **Call Movers** button for members to motion by selecting through the PrimeGov technology. This is optional if members are unable to engage with the technology. (For example, at home during covid-19 rather than in chambers.)



2. Once mover and seconder options are highlighted the Clerk can select **Open Vote.**
3. Clicking **Open Vote** allows the members to vote from their laptops or tablets if they have access. Alternatively, the Clerk can take a roll call vote on members behalf by selecting each member's vote decision.



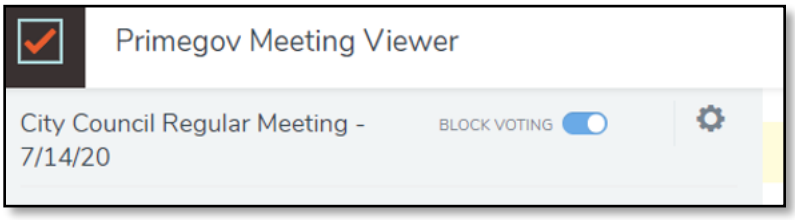
4. When the vote is complete. Click **Close Vote**. This action will display the vote results to the public display screen and to the members view.



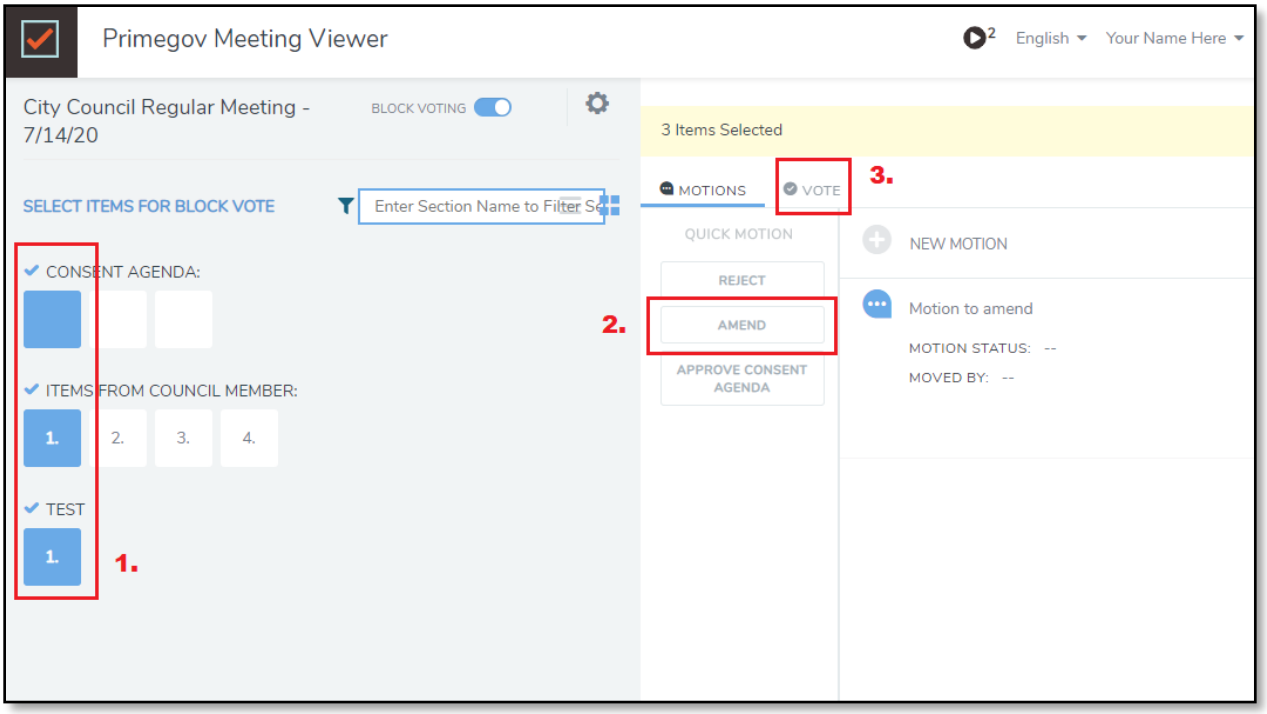
Block Voting

If a motion applies to multiple items within an agenda, “Block Voting” can be used to save time instead of recording multiple instances of the same vote.

To begin a Block Vote, select the **Block Voting** slider near the administration cog in the top right section of the agenda.



To select an item to include in the block vote, click on their **respective boxes** on the left side of the screen. Once the items have been selected **(1.)**, proceed through the steps of creating a motion **(2.)** and a vote **(3.)** as normal.



Managing Public Speakers

You can identify members of the public that have pre-registered to speak during a meeting by first selecting **an item or section on the agenda**, and then choosing the **Speakers** tab. The count of any speakers that are currently signed up appears next to the tab and are listed individually in that tab.

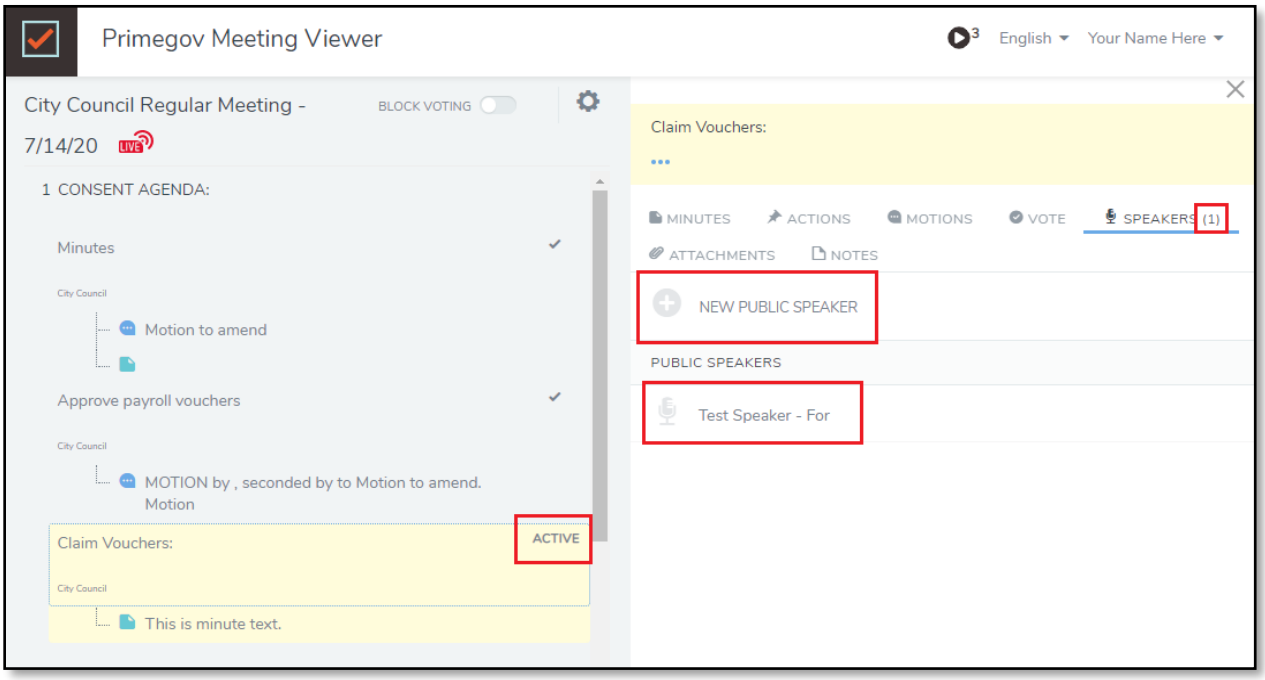


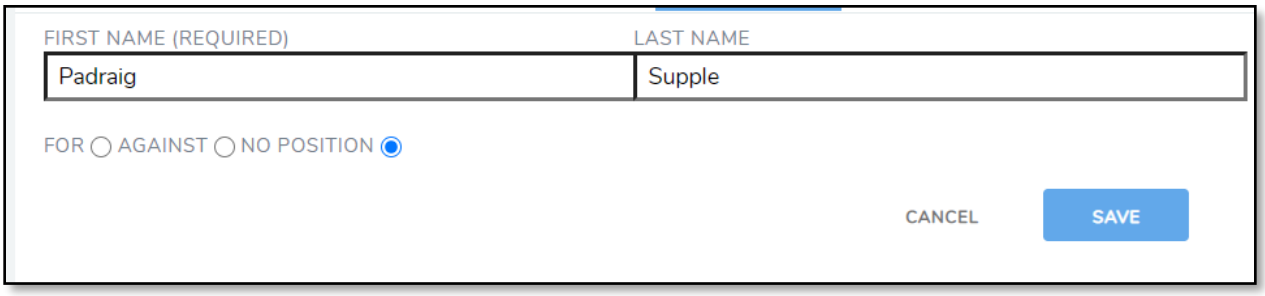
To manually enter a new speaker during the meeting, you can choose the **New Public Speaker** option.

To add a public speaker:

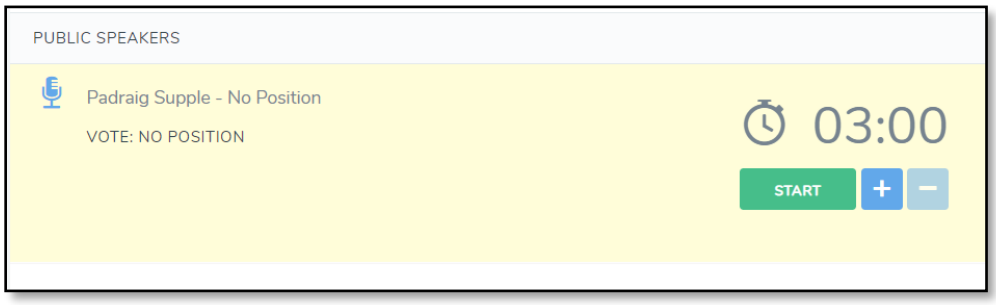
1. **Activate the item** associated with public speakers (usually public comment).
2. Click **Speakers**.
3. Click **New Public Speaker**.

4. Add a First and Last name.
5. Select from **For, Against No Position** options
6. Click **Save**.





7. Once ready for a speaker **double click the name**. Click **Start** to start the countdown timer.
    a. The countdown timer will begin counting down from three minutes. To add or reduce time click the **plus or minus icons**.



Adjourn the Meeting

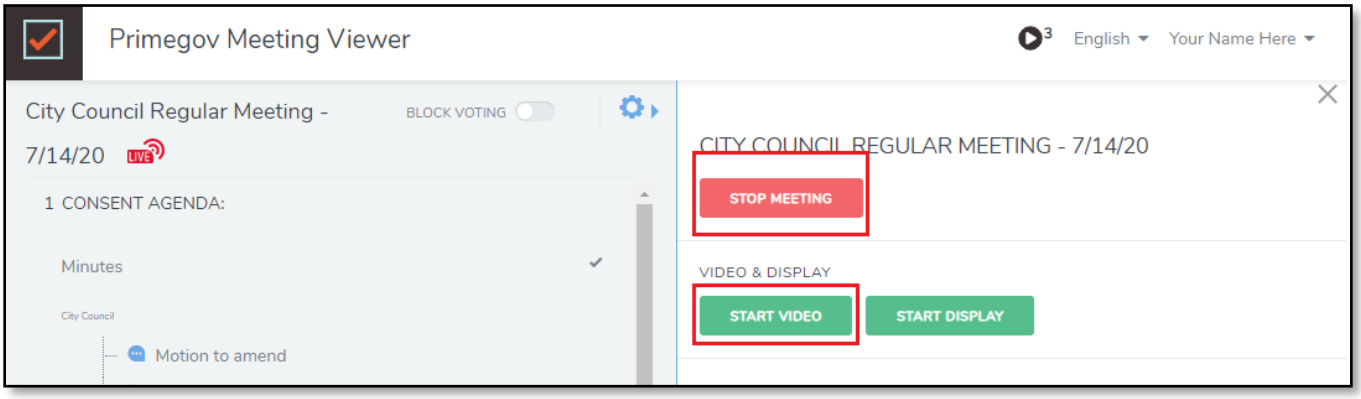


When the meeting has adjourned the video stream needs to be stopped.

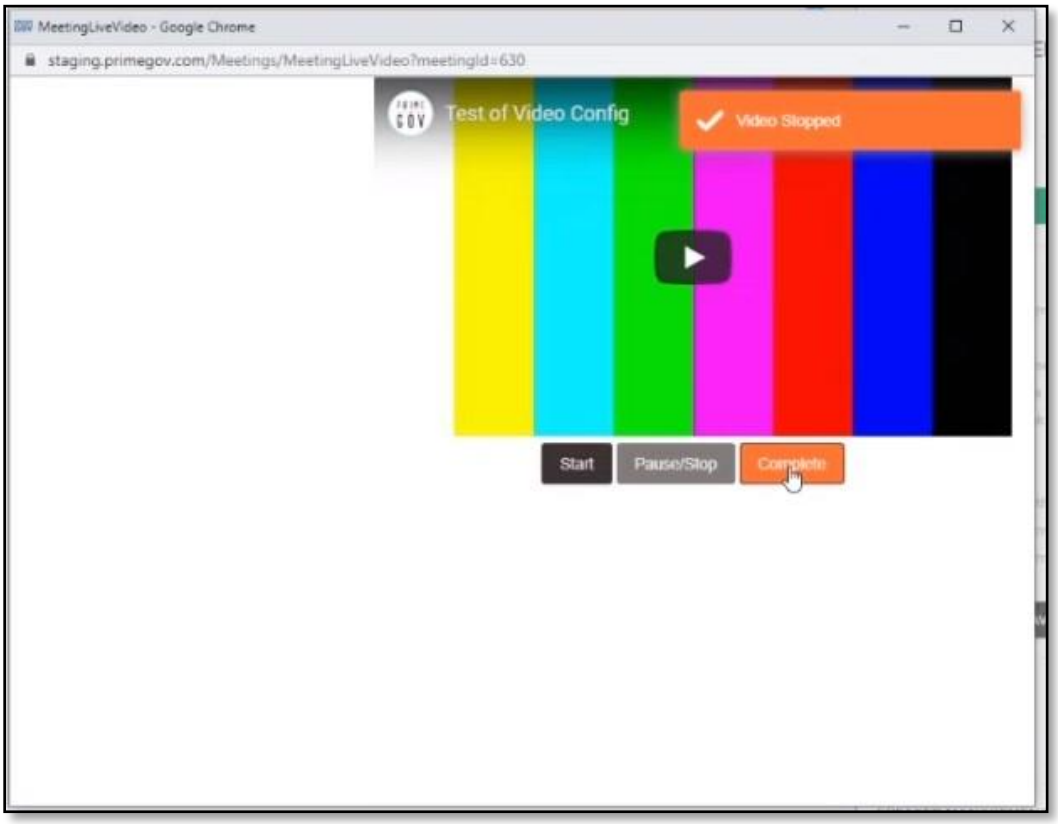
1. Select the **settings cog** to navigate back to video settings and roll call.



2. Select **Stop Meeting** to stop the live stream. The display will show the public that the meeting is no longer live.



3. Identify the open browser with the video preview – select **Complete**.



Congratulations! The meeting is adjourned, and video streaming is off. The meeting is ready for Post-Meeting cleanup.

Post-Meeting Process

After a meeting occurs, clerks will often have to return to the meeting to clean-up minutes and motions from the meeting. Once finalized, documents like Minutes also need to be published to the public.

The Post-Meeting process in PrimeGov consists of the following steps:

1. **Add/Edit Minutes and motions from the meeting**
2. **Add/Edit timestamps for the meeting**
3. **Compile and publish meeting minutes**

Adding/Editing Minutes and Motions After the Meeting

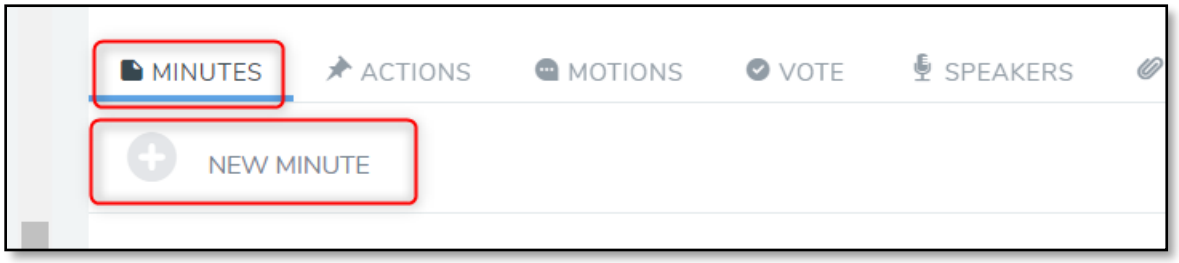
PLEASE NOTE: During Post meeting minute cleanup items should be selected only once when moving through the agenda. DO NOT Activate any Items (Items are activated by double clicking). Activated Items will update the meeting timestamps resulting in the need for video timestamp cleanup.

To add minutes to an Item after meeting

1. Navigate to the **Live Meeting** area.
2. One-click on the Item on the left side of the screen (remember: do not double click items).

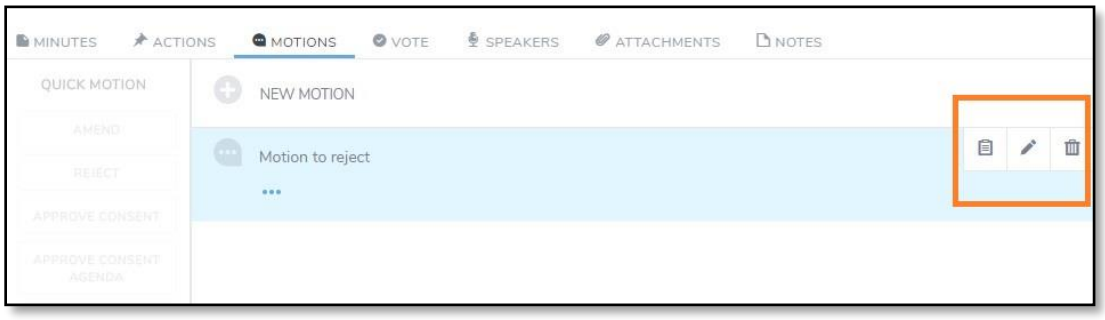


3. Navigate to the **Minutes** area on the right.
4. Click **New Minute**.



5. Type the minute text required
6. To edit an existing minute hover over the minute and select the **edit icon**.

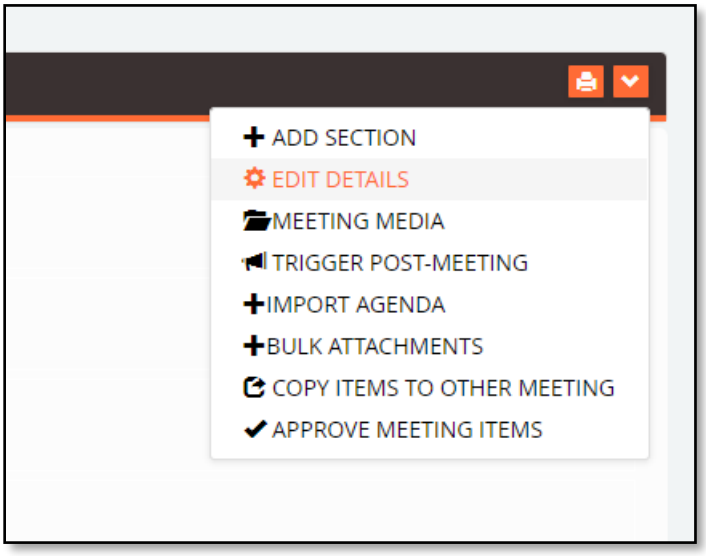
The same actions can be taken for Motions by selecting the **Motions** tab.



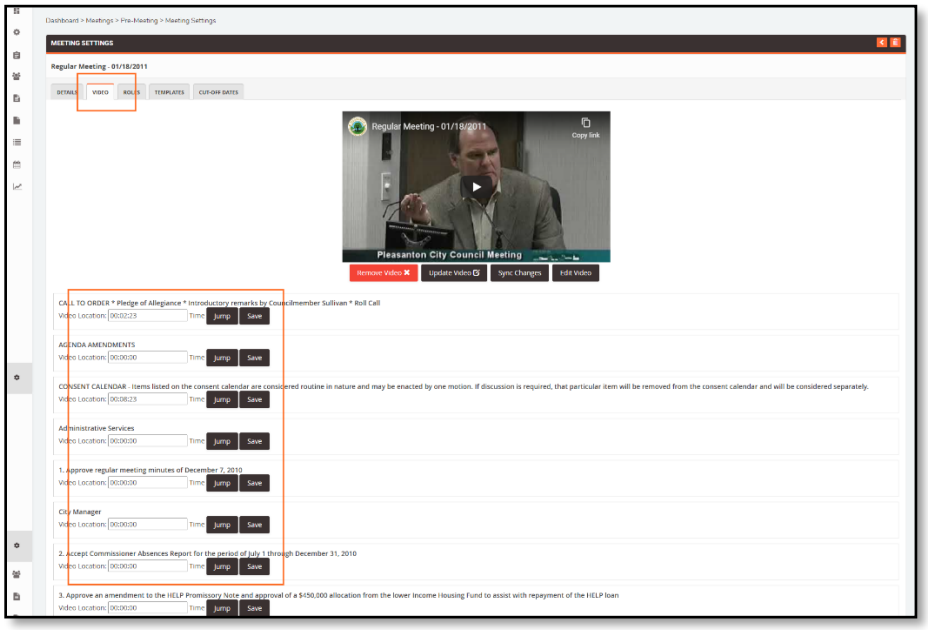
Updating Time Stamps

In the event a timestamp was missed or needs to be edited you can adjust time stamps through the edit details area of the meeting. To edit/add timestamps after a meeting:

1. Navigate to the **Pre-Meeting** area for the meeting
2. Select the **arrow icon** in the upper right corner and select **Edit Details** from the dropdown



3. Navigate to the **Video** tab

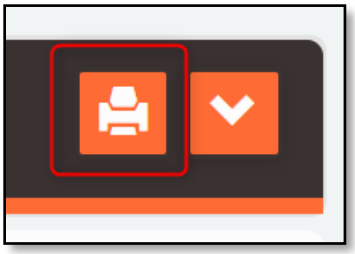


4. Identify the correct timestamp to add/edit. Adjust the time and select **Save**.

Minutes Compilation & Publishing

When the minutes are ready for compilation and publishing the user will carry out the following steps:

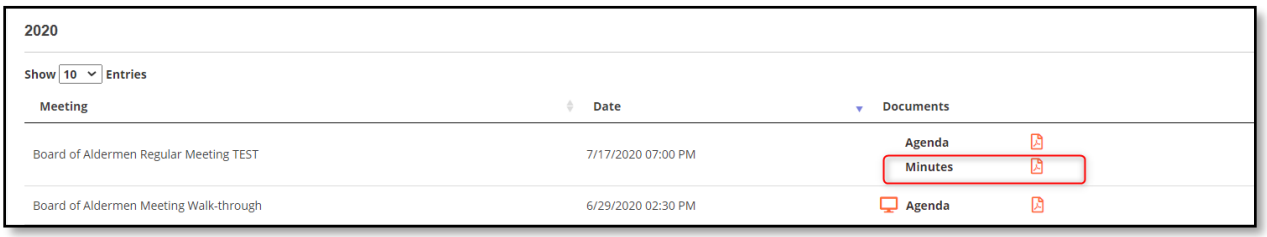
1. Navigate to the **Meeting Media** icon



2. The user will be taken to the Meeting Media page.
3. Under the minutes area click the **Compile All** icon.
4. The minutes will compile in HTML, Word, and PDF formats.
5. To view the compiled minutes, click on one of the three options for **HTML, Word,** or **PDF**.
6. The minutes can be compiled as many times as the user requires. If changes need to be made to the minutes, they should be made in the live-meeting area at this point.
7. To publicly publish the minutes, click the **Publish Public** icon. The minutes can be published in HTML, WORD, or PDF.



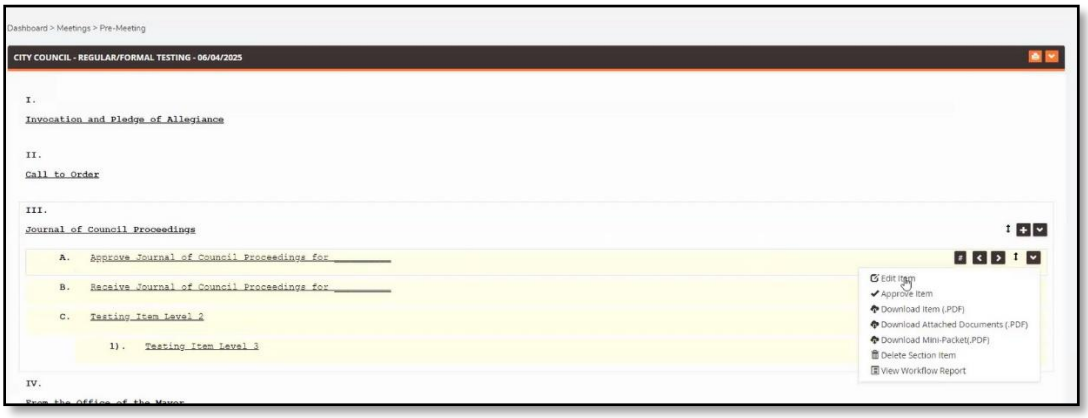
8. The published minutes will now appear in the Public Portal area of the PrimeGov application.



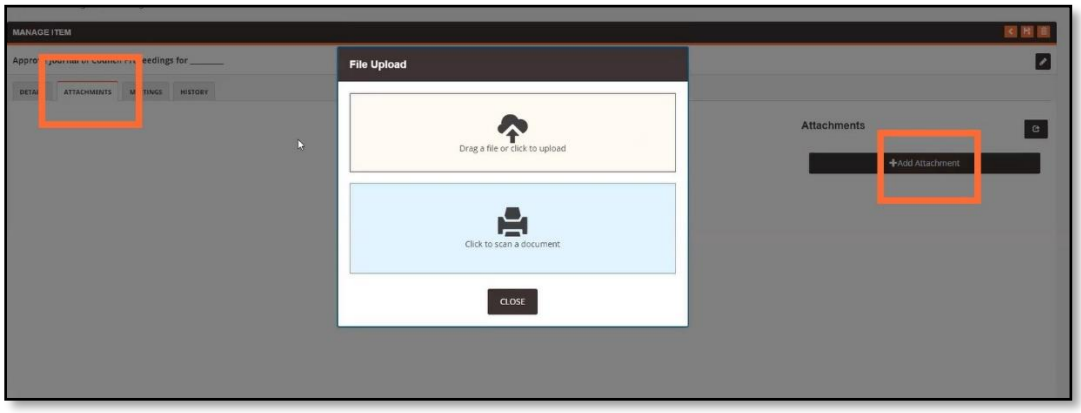
Minutes Approval in the Next Meeting

When minutes are compiled and published to the public, they should be attached to the next upcoming meeting item to approve minutes. To attach the minutes PDF to an upcoming meeting:

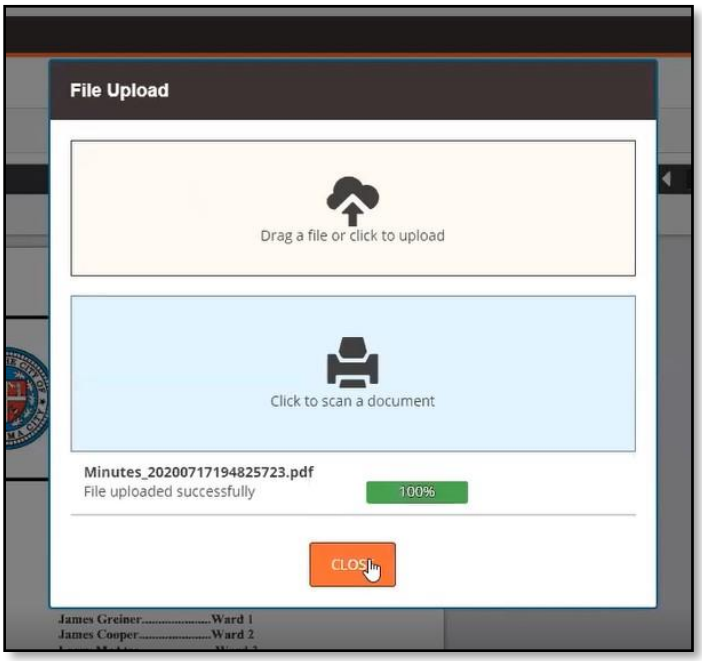
1. Download the minutes PDF from **Meeting Media >Compile & Publish** screen
2. Navigate to the **pre-meeting area for the next meeting > Meetings > upcoming meeting**
3. Identify the item for **Approval of Minutes** and hover over that item
4. Select the **down arrow** icon on the right side of the page and select **Add Attachment** from the dropdown list



5. Select the **Attachment** tab, then **Add Attachment**. Select or drag and drop your file.



6. Once the attachment is loaded, select **Save**. Now the PDF is attached to the item for review in the next meeting.



Additional Resources

You should now feel comfortable navigating the meeting process in the PrimeGov site! We hope this resource was helpful! If you have any questions or if you need additional resources, please reach out to your main contact or our Support team and we will be happy to help!

- Click here to explore our knowledgebase and/or submit a support ticket (account creation required). If you are unable to access the site, email us and we'll add you!
- email: support@primegov.com