

# Creating Standard Agenda Items

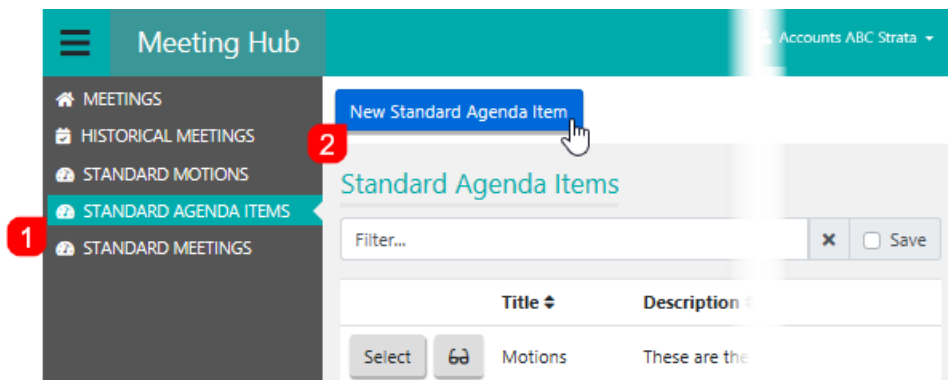
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Frequently used agenda items can be set up by an Administrator as a Standard Agenda Item, and become a reusable component to be used when creating a meeting.

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In order to create a new Standard Agenda Item:

1. Click the *STANDARD AGENDA ITEMS* menu in the *Navigation Pane*.
2. Click the *New Standard Agenda Item* button.



3. Enter the relevant details as per these items:

## Title

The title is mandatory, or heading of the *Standard Agenda Item*.

## Description

A description of the purpose of the agenda item, or the scenario where the agenda item should be included in a meeting. This description is for internal use only.

## Body

The content of the agenda item, which will be displayed for owners in VoteMax, but not in the meeting notice. *StrataMax Merge Fields* may be added to the content, which will insert StrataMax data when the meeting notice or meeting minutes is generated.

## Attachment Placeholders

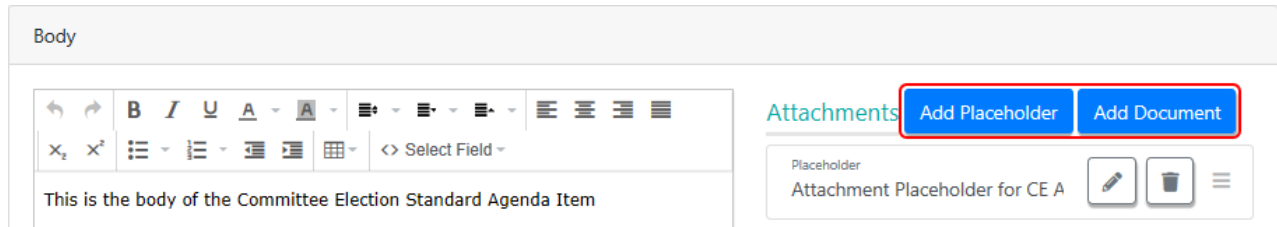
*Attachment Placeholders* will prompt the user to add an attachment when this *Agenda Item* is used in a *Meeting*. To add an Attachment Placeholder:

1. Click the *Add Placeholder* button

2. Type the description into the field, then click *Ok*.

## Documents

Document attachments can also be added to *Standard Agenda Items* to provide additional information.



1. Click the *Add Document* button.
2. When the DocMax screen appears, locate the document, and click the *Select* button.

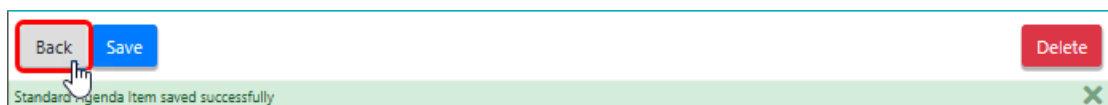
## Explanatory Notes

The content of any explanatory notes that are applicable to the agenda item, which will be displayed for owners in VoteMax, but not in the meeting notice. *StrataMax Merge Fields* may be added to the content, which will insert StrataMax data when the meeting Notice or meeting Minutes are generated.

### Attachment Placeholders for the Explanatory Notes

Document attachments can be added in addition to, or in place of, the explanatory notes for an *Agenda Item*. If a document attachment for the explanatory note is expected to be added to *Agenda Items* based on this *Standard Agenda Item*, then adding an attachment placeholder will prompt the strata manager when this *Standard Agenda Item* is added to a *Meeting*.

4. Once all items are edited and populated with the necessary information, click the *Save* button (note the green notification bar) then click the *Back* button.



5. Back in the *STANDARD AGENDA ITEMS* menu, you can click the *Preview* (glasses) button to see how your new *Standard Agenda Item* will look to owners in VoteMax

The screenshot shows the Meeting Hub interface. On the left is a navigation menu with options: MEETINGS, HISTORICAL MEETINGS, STANDARD MOTIONS, STANDARD AGENDA ITEMS (highlighted), and STANDARD MEETINGS. The main area is titled 'Standard Agenda Items' and contains a table with columns 'Title' and 'Description'. The table has two rows: 'Motions' and 'Standard Agenda Item'. A red box highlights the 'Standard Agenda Item' row. Above the table is a 'Filter...' search bar and a 'Save' button. A 'New Standard Agenda Item' button is located at the top left of the main area.

The screenshot shows a preview window for a 'Standard Agenda Item'. The window has a title bar with 'Standard Agenda Item' and a close button (X). The main content area is divided into two sections: 'Body of the Standard Agenda Item' and 'Explanatory Notes'. Each section contains placeholder text and an 'Attachment Placeholder' icon. A red box highlights the 'Close' button in the bottom right corner of the window.

6. Click the *Close* button to close the preview and return to the *STANDARD AGENDA ITEMS* menu.