

IT Applications Training & Support

BoardDocs

Creating and Approving Board Agenda Items



SAN BERNARDINO CITY
UNIFIED SCHOOL DISTRICT
Making Hope Happen

Revised – 9/9/2019

CONTENTS

BoardDocs Support 1

 Logins/Passwords 1

 24/7 Technical Support 1

 Questions Regarding 1

 Questions Regarding 1

 Questions Regarding 1

Logging In 2

 Changing Your Password 2

 Logging Out 2

Creating An Agenda Item - Submitters 3

 Agenda Item Details 3

 Action and Action (Consent) Details 4

 Approval 5

 Public Content 6

 Save Your Agenda Item 7

Editing an Existing Agenda Item 8

 Duplicating Agenda Items 8

 Deleting Agenda Items 8

Submit Agenda Item For Approval 9

Editing, Approving, Rejecting and Rerouting Agenda Items - Approvers 10

 Login 10

 Approving and Rejecting Agenda Items 10

 Rerouting Agenda Items 10

Viewing Agenda Items 11

 Viewing Your Agendas Items 11

 View Meeting Agendas 11

 Viewing Attachments/Supporting Documents 11

Printing 12

 Printing Your Agenda Items 12

 Print Meeting Agendas 12

Searching 13

 Search My Agenda Items 13

Search Meetings.....	13
Performing Advanced Searches	13
Library	14
Example Agenda Item	15

BOARDDOCS SUPPORT

LOGINS/PASSWORDS

karen.cunningham@sbcusd.k12.ca.us

24/7 TECHNICAL SUPPORT

Web: <https://go.boarddocs.com/manual/help.nsf/ViewHelp?open&v=Pro&role=Administrator#>

Email: support@boarddocs.com

Phone: 800-407-0141, option 1

QUESTIONS REGARDING

Contracts, Non-District Facilities Use, Non-Classified Experts agenda items

gloria.vega@sbcusd.com

QUESTIONS REGARDING

Business In-services, Course of Study, Extended Field Trips, and Gifts/Donations agenda items

lou.galvin@sbcusd.k12.ca.us

QUESTIONS REGARDING

SBCUSD Meeting/Agenda Development

karen.cunningham@sbcusd.k12.ca.us

LOGGING IN

1. Run a **web browser**, and enter the following URL; <https://go.boarddocs.com/ca/sbcusd/board.nsf>
2. **Click on Authenticate**
3. Enter your **username** and **password**

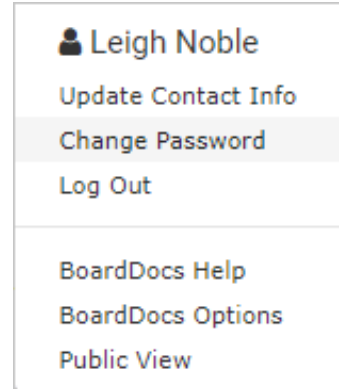
Username: firstinitiallastname Initial account **password:** contact Karen Cunningham

4. **Click on Sign In**

NOTE – You will want to change your initial password that was assigned to a password of your choosing.

CHANGING YOUR PASSWORD

1. Once logged in, **click on the Profile Menu**
2. Choose **Change Password**
3. Enter the current password
4. Enter and confirm the new password of your choosing
5. **Click on Change Password**



NOTE – BoardDocs technical personnel cannot assign or reset passwords. Users who have forgotten their passwords must contact karen.cunningham@sbcusd.com.

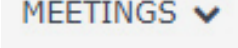

LOGGING OUT

1. To log out of BoardDocs, **click on the Profile Menu**
2. Choose **Log Out**



CREATING AN AGENDA ITEM - SUBMITTERS

AGENDA ITEM DETAILS

1. Click on the **Meetings Menu** and choose **My Agenda Items** 
2. Click on the **Hamburger Menu Button** and choose **New Agenda Item** 
3. Click on the **Meeting drop-down list** and choose the board meeting this new agenda item will apply to

NOTE – October 1st is the first Board meeting you can develop an agenda item for with BoardDocs.

4. Click on the **Category drop-down list** and choose the appropriate category for this agenda item

Category defines where on the Agenda the item will be placed.

Agenda Category Use Case	
Action Items (commonly used)	Personnel Reports, adoption of budgets, board bylaws, charter school petitions, Board on-going initiatives and reports, Board follow up, and future agenda items discussion.
Adjournment	Adjourning the meeting.
Closed Session	Litigation items, public employee appointment, public employee discipline/dismissal/release, student matters/discipline, etc.
Consent Items (common used)	Agreements, acceptance of gifts and donations to the District, amendments to agreements, bids and Request for Proposals (RFPs), software license agreements, course of study, extended field trips, business and in-service meetings, facilities use agreements, memorandum of understandings, etc.
Opening	Call to order, pledge of allegiance, adoption of agenda, inspirational message
Presentations	Resolutions,
Public Comments	Public open floor
Public Hearings	Public disclosures, public hearings, etc.
Reconvene to Open Session	Action reported from closed session
Reports and Comments	Reports by SBTA, CSEA, Communications Workers of America, SB School Police Officers Association, comments by Board members, Superintendent and staff members
Special Presentations	Special Recognitions or resolutions
Student Board Member Comments	Student Board Member comments.
Summary of Board Requests	

Continued...

5. Enter a **Subject/Title** for this agenda item (Indicate your request and then your Division)

Examples:

- Memorandum of Understanding with (Vendor), Student Services
- Non-classified expert with (Vendor), Educational Service
- Agreement with (Vendor), Educational Services
- Ratification of the Agreement with (vendor), Business Services
- Amendment of the Agreement with (Vendor), Human Resources
- Renewal of the Agreement with (vendor), Continuous Improvement
- Course of Study with (Vendor), Educational Services
- Amendment of the Course of Study with (vendor), Educational Services
- Extended Field Trip with (Vendor), Student Services
- Business and In-service with (vendor), Student Services

6. Use the **Access drop-down** list to select **Public**
7. Select the appropriate **Type** for this agenda item

Recommended Action Use Case	
Action (commonly used)	Personnel reports, adoption of budgets, board bylaws, charter school petitions, board follow up items, and future agenda items discussion.
Action (Consent) (commonly used)	Contracts, Non-Classified Experts, Extended Field Trips, Course of Study, Business In-Service
Discussion	
Information	
Minutes	
Presentation	
Procedural	
Reports	

ACTION AND ACTION (CONSENT) DETAILS

1. Enter the **Preferred Date** (this is the board date you want your item to be approved by board)
2. Enter the **Absolute Date** OPTIONAL (this the date the agenda item can go to board without ratification, If the board approval is after the effective date then it is considered a Ratification)
3. Select whether or not there’s a **Fiscal Impact** to the District
 - Choose **Yes** when there is a cost to the District and a purchase requisition is required.
 - Choose **No** when the district incurs no cost.
4. Enter the not to exceed Dollar Amount of the agenda item (225,000.00)
5. Enter whether or not this has been Budgeted for
 - Choose Yes when there is a cost to the District and a purchase requisition is required.
 - Choose No when the district incurs no cost.

Continued...

6. In the **Budget Source** field, enter the purchase requisition number and the 25 digit budget code

Example: 600354 / 01-0458-0-1110-1000-5850-502-419

Or if more than one budget: 600354 / 01-0458-0-1110-1000-5850-502-419 / 01-0441-0-0000-2100-5850-502-243

7. Enter a **Recommended Action** you want the board to take

Examples:

- Approval of the Agreement
- Approval of the Renewal
- Approval of the Amendment to the agreement to increase the total cost
- Approval of the Amendment to the Agreement to extend the period of performance
- Approval of the Course of Study
- Approval of the Extended Field Trip
- Approval of the Business In-Service
- Approval of the Amendment to the Course of Study to correct the period of performance
- Approval of the Amendment to the Extended Field Trip to increase the total cost
- Approval of the Extended Field Trip and Agreement
- Approval of the Facility Use Agreement
- Approval of the Non-Classified Expert

APPROVAL

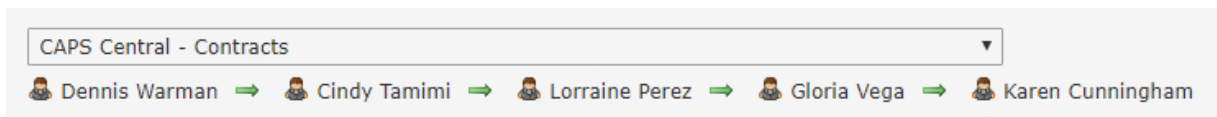
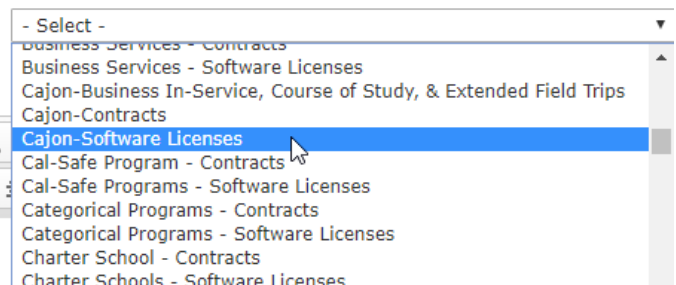
1. Use the **Approval Tree drop-down list** to select the corresponding approval tree per this agenda item

Select by site/department and by the service wanted.

Examples:

- North Verdemont – Business In-Service, Course of Study, and Extended Field Trip
- San Gorgonio – Contracts
- Pacific – Software License
- Monterey – Contracts
- Mt. Vernon - Business In-Service, Course of Study, and Extended Field Trip

Once the approval tree is selected, the persons in the approval tree will display.



Continued...

PUBLIC CONTENT

The Public Content field displays agenda content and attachments that should be visible to all BoardDocs users, including public, administrative, and executive readers.

1. In the **Public Content text entry field**, enter/type the agenda details and or narrative for the agenda item

Content structure:

1st paragraph: BE IT RESOLVED that the Board of Education approves:

2nd paragraph: should be Vendor name, city, state, etc.

3rd paragraph: should be Period of performance (effective period) E.g. CA Effective Sept 10, 2019

4th paragraph: Cost for services, not to exceed \$ at a cost per teacher of \$ or cost per student of \$ or daily cost of \$ or cost per workshop/session of \$ E.g. Cost for Services, not to exceed \$18,000.00

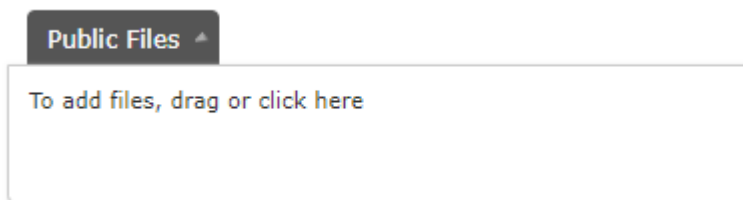
5th paragraph: What services is the vendor providing? Who are they providing the services to? How many people are receiving the service? E.g. Provide Mindful Leadership and Educational Neuroscience professional development for up to 50 teachers and administrators. Training will include implementation of the Mindful Leadership Experience, group coaching, site-visits, lesson planning, program evaluation, and technical support.

6th paragraph: (only for Administrative Assistants) Program Budget: Unrestricted General Fund – Local Control Accountability Plan (LCAP), Account No. 419.

7th paragraph: Board of Education authorizes Debra Love, Director, Purchasing, to sign all related documents.

8th paragraph: Requester: Title, Site or Department (i.e., Principal, Arrowview Middle School)

2. Upload any supporting or required documents/files in the **Public Files field**. Right-click on an uploaded file to delete it.



3. Required documents per agenda item type are as follows:

Professional/Consultant Services Agreements

Provider's Proposal, Provider's Contract (if provided), Determination of Applicability of Fingerprint Requirement Form (completed by Principal/Director), W-9 Tax Form (if costs involved)

Non-Classified Expert

Non-Classified Expert's Proposal, Determination of Applicability of Fingerprint Requirement Form (completed by Principal/Director), W-9 Tax Form (if costs involved)

Use of Non-District Facility

Facility’s Contract (if provided), Meeting Agenda (if applicable), W-9 Tax Form (if costs involved)

Software License Agreements

License Agreement/Contract, W-9 Tax Form (if costs involved)

Business and In-Services

List of names of attendee(s) and title(s), copy of flyer, travel forms (BU-92s)

Course of Study

Copy of flyer, Fingerprint and Criminal Background Check Certification form (completed by Provider), Determination of Applicability Requirement form (completed by Principal/Director), W-9 Tax Form (if costs involved)

Extended Field Trips

Copy of flyer, page listing transportation costs, name of the transportation company, or indicate if transportation will be provided by private vehicle. Also, include budget number/account name.

NOTE – *Administrative Content: Displays confidential agenda content and attachments intended for viewing by administrative readers (Cabinet and Board Members). Executive Content: Displays confidential agenda content and attachments intended for viewing by executive readers (Board Members).*

SAVE YOUR AGENDA ITEM



1. To save your new agenda item, **click** on the **Save Button** above

NOTE – *Saving does not send the item along for approval. It simply saves your work on this item, so you can continue further work on it later.*

NOTE – *Agenda Items you have saved but have not been submitted or approved show under Draft in My Agenda Items. Once your agenda item has been approved the item will no longer show in your Agenda Items.*

EDITING AN EXISTING AGENDA ITEM

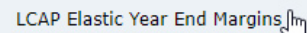
1. Click on the **Meetings Menu** and choose **My Agenda Items**



2. Click on **Draft**



3. Click on the **agenda item** in question



4. Click on the **Edit** button



5. Edit the item as needed

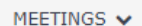
6. To save your new agenda item, click on the **Save** Button above



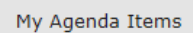
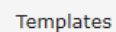
NOTE – Agenda Items you have saved but have not been submitted or approved show under Draft in My Agenda Items. Once you agenda item has been approved the item will no longer show in your Agenda Items.

DUPLICATING AGENDA ITEMS

1. Click on the **Meetings Menu** and choose **My Agenda Items**



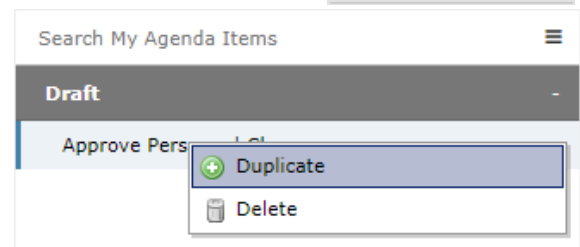
2. Click on **Draft**



3. **Right-click** on the item and choose **Duplicate** from the menu

A copy of the item appears in the list

4. Edit the duplicated item as necessary



DELETING AGENDA ITEMS

1. Click on the **Meetings Menu** and choose **My Agenda Items**

2. Click on **Draft**

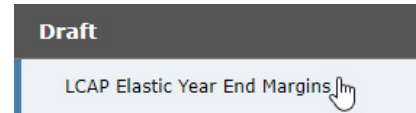
3. **Right-click** on the item and choose **Delete** from the menu

4. Confirm the deletion in the message window that appears

SUBMIT AGENDA ITEM FOR APPROVAL

1. Click on the **Meetings Menu** and choose **My Agenda Items**

2. Click on the **agenda item** in question



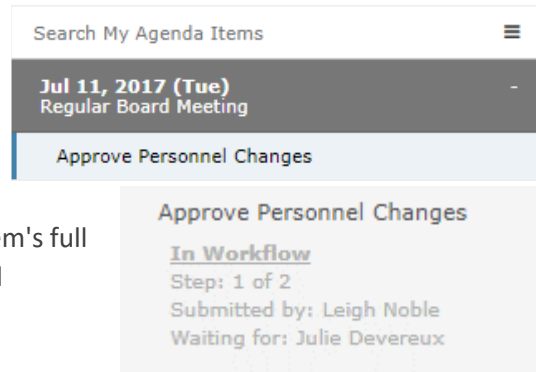
3. Click the **Submit** button



4. Click **OK** in the confirmation window to complete the submission.

NOTE – Submitters receive an email notification when their item is approved. Submitters receive an email notification if their item is rejected. The agenda item may be rejected to the submitter by the approver for revision or the approver may revise the item themselves and submit to next approver.

- Once submitted, the meeting name appears above the item.
- The submitted item appears in the Agenda panel's navigation area along with its workflow status. The status notation updates as the item moves from approver to approver.
- Once fully approved, the status notation in the navigation area is removed. However, if enabled, the item's full workflow history displays in an information area labeled "Workflow" near the bottom of the document.



NOTE – After submitting an item, the submitter can edit the item and make any necessary changes up until the time the first approver approves it. However, after the first approval has occurred, the submitter can no longer make changes to the item unless an approver or publisher rejects it.

NOTE – Approvers may submit the item to the next approver or reject the item back to the submitter for revision or revise the item themselves and submit to next approver.

EDITING, APPROVING, REJECTING AND REROUTING AGENDA ITEMS - APPROVERS

If you carry the role of a Board Agenda Approver, you will receive emails in your District inbox alerting you that an agenda item has been submitted or rerouted to you.

LOGIN

1. Run a **web browser**, and enter the following URL; <https://go.boarddocs.com/ca/sbcusd/board.nsf>
2. **Click on Authenticate**
3. Enter your **username** and **password**

Username: firstinitiallastname Initial account password: contact the Purchasing department

4. **Click on Sign In**


NOTE – You will want to change your initial password that was assigned to a password of your choosing.

APPROVING AND REJECTING AGENDA ITEMS

1. **Click on the Meetings Menu** and choose **My Agenda Items**
2. **Click on the meeting** and **Click on the agenda item** in question

MEETINGS ▾

Draft

LCAP Elastic Year End Margins 

NOTE – If you need to make changes to the item, click Edit. A screen with editing fields, menus, and content areas displays. Click Save to preserve your changes.



3. If you are ready to advance the item to the next approver, **click Approve**
4. Alternatively, if you want to return the item to the original submitter for revision, **click Reject**



REROUTING AGENDA ITEMS

1. If you want to route it back to a previous approver for review, click Route to a Previous Approver
2. In the dialog box that displays, choose the recipient from the list of approvers, add desired notes in the **Comments** field, and **click OK**



Route this document back to:
 Julie Devereaux ▾

Comments
 Please review the new attachment. I made a few changes to the budget numbers.

OK Cancel

NOTE – Approvers may submit the item to the next approver or reject the item back to the submitter for revision or revise the item themselves and submit to next approver. Or you may reroute the item to anyone in the applicable approval tree.

VIEWING AGENDA ITEMS

VIEWING YOUR AGENDAS ITEMS

1. Click on the **Meetings Menu** and choose **My Agenda Items**
2. Click on **Draft** and Click on the **Agenda Item** you want to view

MEETINGS ▾

Draft

LCAP Elastic Year End Margins

NOTE – Agenda Items you have saved but have not been submitted or approved show under Draft in My Agenda Items. Workflow details of Agenda Items which are moving in the approval tree are displayed at the bottom of the agenda item.

VIEW MEETING AGENDAS

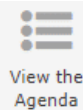
1. Click on the **Meetings Menu** and choose **Active** or **Draft**

NOTE – Active lists any and all fully approved meetings. Draft lists meetings, which have not been through final approval.

2. Click on the **Meeting** you wish to view agenda items

Sep 17, 2019 (Tue)
Regular Meeting of the Board of Education

3. Click on **View the Agenda**



NOTE – Your agenda items which have been approved are no longer in your my agenda screen. However, you can view your agenda items via the Draft or Active screens. Workflow details of Agenda Items which are moving in the approval tree are displayed at the bottom of the agenda item.

VIEWING ATTACHMENTS/SUPPORTING DOCUMENTS

1. Click on the **Meetings Menu** and choose **My Agenda Items**
2. Click on the **Agenda Item** that maintains attachments you wish to view
3. Click on the desired attachment within the **Content Sections** of the agenda item

MEETINGS ▾

Public Files ▾

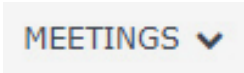
18-19 CCIF FormUSER.pdf (167 KB)


NOTE - Depending on the sensitivity of the information, some documents may be attached to the Administrative Content or Executive Content fields to limit access to individuals with confidential content viewing rights.

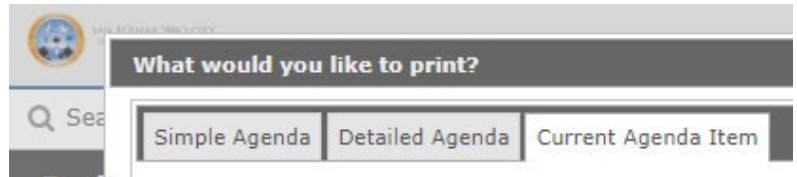
PRINTING

PRINTING YOUR AGENDA ITEMS

1. Click on the **Meetings Menu** and choose **My Agenda Items**
2. Click on the **Agenda Item** you want to print



3. Click on the **Print Button** 
4. Click on the **Current Agenda Item** tab



Current Agenda Item – prints only the agenda item you are currently viewing

5. Click the **Print Button** in the lower right corner of the window to initiate the print window



and click on **Print**

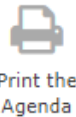
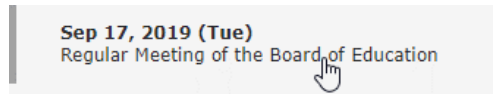


PRINT MEETING AGENDAS

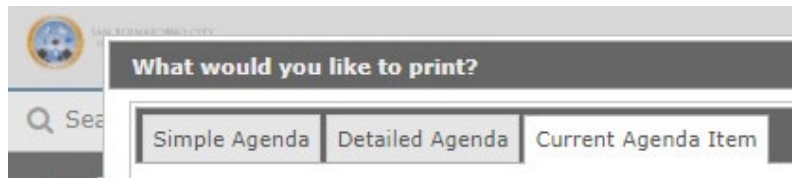
1. Click on the **Meetings Menu** and choose **Draft** or **Active**

NOTE – Active lists any and all fully approved meetings. Draft lists meetings, which have not been through final approval.

2. Click on the **Meeting** you wish to print
3. Click on **Print the Agenda**
4. Click on the **Current Agenda Item** tab



Simple Agenda – prints the category and agenda item titles in outline form (no additional content is included)



Detailed Agenda – prints category titles, agenda item titles and agenda item content as determined by the access privileges of the person who is printing the agenda

Current Agenda Item – prints only the agenda item you are currently viewing

5. Click the **Print Button** in the lower right corner of the window to initiate the print window



and click on **Print**



SEARCHING

SEARCH MY AGENDA ITEMS

1. **Click** on the **Meetings** menu and choose **My Agenda Items**
2. **Click** in the **Search field** and enter your search term(s)
3. **Press** the **Enter** key to return a list of agenda items that match your search

MEETINGS ▾

NOTE – When finished viewing the results, **click** into the **search field** and press the **ESC key** to clear the list and redisplay the agenda navigation area.

SEARCH MEETINGS

1. **Click** on the **Meetings** menu
2. Choose the desired meeting state **Active** or **Draft**
3. **Click** in the **Search field** and enter your search term(s)
4. **Press** the **Enter** key to return a list of meetings that match your search
5. **Click** on a **meeting** in the results list

MEETINGS ▾

Q Search Meetings

BoardDocs navigates to the agenda and displays a list of matching items

6. **Click** on an **agenda** in the results list to view its content

NOTE – When finished viewing the results, **click** into the **search field** and press the **ESC key** to clear the list and redisplay the agenda navigation area.

PERFORMING ADVANCED SEARCHES

1. From the header, **click** on the **Search** icon
2. Specify the document types to include in the search by enabling or disabling the document type buttons
3. **Click** in the **Search field** and type the desired search term(s)
4. **Click** on an **item** in the results list to view its content
5. **Click** on the **Navigate There** button to navigate to where the item is found
6. If desired, **click** the **Search** icon again to view additional results

LIBRARY

The Library is a document storage area where publishers can create and store reference materials, including; press releases, news items, reports, newsletters, images, correspondence, goals, events, explanations, meeting guidelines, or other important documents.

There are four library types: General, Events, Strategic Goals, and Board Members. A Library tab menu provides navigation to the four library screens.

NOTE – Library items can be public or private, and can include confidential administrative- or executive-level content. Access to private content fields is governed by the viewer's access rights.

General Library Items

1. Choose the desired category from the Library menu.
2. Choose the desired library item category

NOTE – Categories are created, structured, and managed by your organization's publisher.

3. Select an item from the list to view its content

NOTE – Library items have the same three content areas as agenda items, and access to the content fields is governed by your viewing privileges.

Available in the Library are:

Board of Education Meeting Calendar

Purchasing Department Board Agenda Items Due Dates

EXAMPLE AGENDA ITEM

Agenda Item Details

Meeting	Aug 20, 2019 - Regular Meeting of the Board of Education
Category	9. Consent Items
Subject	9.5 Agreement with Dr. Vincent Pompei (Student Services)
Access	Public
Type	Action (Consent)
Preferred Date	Aug 20, 2019
Absolute Date	Aug 20, 2019
Fiscal Impact	Yes
Dollar Amount	2,900.00
Budgeted	Yes
Budget Source	202562/01-0452-0-0000-2495-5850-799-419
Recommended Action	Approval of the Agreement

Public Content

BE IT RESOLVED that the Board of Education approves:

Dr. Vincent Pompei, San Diego,

CA Effective August 21, 2019 -

August 30, 2019

Cost for services, not to exceed \$2,900.00 at a daily cost of \$1,450.00

Provide two days of training for up to 200 elementary and secondary school leaders on Creating Safe & Inclusive Schools for Transgender Students.

Unrestricted General Fund - Local Control Accountability Plan (LCAP), Account No. 419

Board of Education authorizes Debra Love, Director, Purchasing, to sign all related documents

Requester: Director, Student Wellness & Support Services

[Vincent Pompei.pdf \(490 KB\)](#)

Administrative Content

Executive Content