

## CREATING MONTHLY MEETING RECORDS

### STEP BY STEP INSTRUCTIONS

The following instructions explain how to enter minutes on line under the **Create Meeting Record** in your Monthly Meeting section of the new Quaker website. To do so, ensures that your minutes will be searchable by Friends in the future and can be related to other minutes if you wish.

The create Meeting Record function is restricted to Clerks and their designated assistant/s.

Uploading old minutes to create an archive can be done by any MM Content Editor. Create a bullet list of Meeting dates on a basic page entitled MM Minutes Archive under Other Pages and use the link function to upload the pdf files for the relevant date. See uploading pdf documents under the User Guide for full instructions. This system can be used for historic records but is not recommended for new minutes.

There are 4 optional ways to get minutes on-line under the Minutes tab. They all start by Creating the Meeting Record which give the date, venue, attendees etc

### CREATING A MEETING RECORD

1. LOG ON
  - a. Go to [quakers.nz](http://quakers.nz)
  - b. Click Friends Access to log on
  - c. Type in the first few letters of your user ID (which is your first and surname without a space) and select your name from the drop down list
  - d. Type in your password (as used in the current website)
  - e. If you are using your own computer, do not Logout when you finish and you will remained logged in as a Friend on your next visit to the website.
  - f. As clerk you have automatic editing permission on your MM pages. (if you have problems and cannot see the option Create Meeting Record contact <mailto:webmanager@quaker.org.nz>)
2. OPEN YOUR MONTHLY MEETING PAGES
  - a. Go Connect>Find a Monthly Meeting
  - b. Select your MM from the drop down list or from the entries on the Monthly Meeting page
  - c. The screen should now show your own MM pages
3. TO OPEN & SET UP THE MINUTES TEMPLATE
  - a. Select: **Create Meeting Record** from the right hand menu
  - b. Fill in the short Meeting code for your MM
  - c. Leave the Meeting status as Draft. Later it can be changed to show progress. DO NOT LOCK the minutes as then you can make no further changes. The Lock status is useful when you are archiving the minutes.

### *Create Meeting Record*

Meeting Code \*

Your choice of short reference for a quick response when searching the minutes repository, e.g. your MM letter code

Meeting Status \*

- Draft
- Proofed
- Signed
- Lock

When status is set to Locked, you can no longer modify the Meeting Minutes.

d. Set Meeting type to Monthly Meeting from the drop down menu

Meeting Type \* Monthly Meeting

4. ENTER MEETING OCCASION DETAILS

- a. Turn off the button Show End Date (click once) – only show end date if the meeting goes for more than one day
- b. Today's date will show automatically and the current time. Leave date as is if correct, if not click on the date and a calendar will appear. Select the date.
- c. Click on the time to type in the start time of the meeting
- d. Venue: click in this box and a drop down list will appear with previously entered venues so you may not need to retype after the first time.
- e. Add people present: click on Add Friend bar and type in first few letters of the name and a drop down list will appear of similar names. Select the one you want. Repeat the process.
- f. For visitors or people not in the membership database manually type the names in the box below.

Date \*

10/04/2019 04:41pm

Apr 2019

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Present

Add Friend

Heather Denny x j

- Jill Burdett
- Jill Forbes
- Jill Hadfield
- Jill Stevenson
- Jill Stewart
- Jillian Wychel
- Jillian Yorke
- Jim Batson
- Jim Burdett
- Jim Flewitt

## 5. SET VISIBILITY

Scroll down and check the visibility status. It should be semi public so that Friends can read the minutes. (The Private button is only for when minutes need to be restricted to internal group members only for sensitive information such as the Trust Board or Elders.)

Visibility \*

Semi-Public (visible to all logged in users only)

Private (visible to group members only)

6. You are now ready to start recording the minutes of the meeting. This is a good juncture to scroll to the bottom of the screen and press SAVE.

SAVE will jump you to into VIEW mode where you can see the meeting record created so far.


## Option 1: CREATING MEETING MINUTES BY TYPING ON LINE

### 7. CONTINUE TO ENTER THE INTRODUCTION

- a. Click on EDIT to continue
- b. Scroll down to the blank free text field where you can type your introduction.

Description([Edit summary](#))

The meeting began with Silent worship and the following reading:



A free text area to use as you wish

- c. Add a blank line (press ENTER once) at the end of your entry.  
(The extra line separates the section with white space when printed.)
  - d. SAVE again – scroll to the SAVE button at the bottom of the page. The more often you save the file the safer your work is from accidental loss through power outages or other problems.
  - e. You are now ready to start to record the minutes of the meeting.
8. GET READY TO ENTER A NEW MINUTE
    - a. After saving you will land on a VIEW screen showing you everything you have typed in so far.
    - b. Click ADD MINUTE

## 9. ENTER MINUTES

- In the box **Minute Title** type in the topic heading only — leave out the number of the minute as these are automated as Minute 1, Minute 2 etc.
- Leave the **Minute status** as Draft
- Minute type** is usually left as General (except for special minutes such as Appointments, Resignations or Deaths selected from a drop down list)
- In the **Minute Body** box type the minute (**to paste** using the input port see Option 2).
- Add a blank line (press ENTER once) at the end of each minute.  
(The extra line will separate the minutes with white space when printed.)
- SAVE (related minutes, attachments if any can be done later)

### Create Meeting Minutes

Meeting Record \*

2019-04-10-NTMM-Northern Monthly Meeting (2153)

The Meeting Record where this minute will be attached to

Minute Title \*

Type topic heading but not the number

Minute Status \*

Draft

If status is not Draft - then this content will be published.

Minute Type \*

General Minute

Minute Body template will change depending on the selected Minute Type.

Minute Body

**B I U S** [Rich Text Editor Icons]

The meeting agrees to .....

TOP

## 10. ADD MORE MINUTES

- Use the Add Minute Button to add the next minute.
- SAVE each minute as you go  
Note this minute save does not save the whole meeting record so it is good practice to use the Save at the bottom of the page at regular intervals.

- c. You can go back into a previous minute to edit it or delete it
- d. To shift the order of minutes, click and drag the cross bar to the left of the listed minute.

The screenshot shows a web browser window with the URL `quakerstage.kodait.com/node/2153/edit`. The page has a dark navigation bar at the top with various menu items like 'Content', 'Structure', 'People', etc. Below this, there's a 'Visibility' section with radio buttons for 'Semi-Public' and 'Private'. The main content area is titled 'Meeting Minutes' and contains a table with columns: Minute Title, Minute Status, Minute Type, and Operations. The table lists two minutes: 'Correspondence' and 'Treasurer's Report', both in 'Draft' status. Below the table is an '+ Add Minute' button. Underneath is an 'Ending Statements' section with a rich text editor toolbar (containing icons for bold, italic, underline, etc.) and a text input area. A 'TOP' button is visible at the bottom right of the text editor area.

- a. At the end of the meeting type in your Ending Statement (go into EDIT mode and scroll down to the box).
- b. You can also copy and paste any Appendices into this free text box
- c. You can insert images, upload files using the Editing bar at the top of the box.
- d. SAVE the whole page by scrolling down to the SAVE button.
- e. This will return you to the main VIEW screen

## 11. CHECKING YOUR MINUTES

- a. You can view the whole set of minutes
- b. An index at the head of the page allows you to go straight to any chosen minute
- c. You can edit or delete a minute directly by click on the wheel which appears when you hover your mouse on the extreme left
- d. You can add another minute

The screenshot displays a meeting record page. At the top, it shows the date '10 April 2019 - 4:43pm' and the venue 'Mt Eden Meeting House'. Below this is a 'Present:' section listing attendees: Claire Gregory, Daniel Jose, Heather Denny, Jim Flewitt, Linley Gregory, and Nicholas Jose. An index of minutes is provided: 'Minute 1: Correspondence' and 'Minute 2: Treasurer's Report'. The main content area shows the text for 'Minute 1: Correspondence', including its type ('General Minute'), status ('Draft'), and a brief description. A gear icon is visible on the right side of this minute entry, indicating edit or delete options. At the bottom, there is an 'Add Minute' button and a note: 'The Meeting ended at 12:15 with a period of silence.'

## 12. PROOFING & PUBLISHING

- a. You can print a draft pdf to read and to send for proofing. It has a watermark saying DRAFT all over it.
- b. You can invite your co-clerk to view the minutes on line for proofing and editing
- c. Ask them to change the minute status to Proofed after checking

2019-04-10-NTMM-Northern Monthly Meeting

**MINUTES of the MONTHLY MEETING FOR NORTHERN MONTHLY MEETING**  
**held at 04:41 pm on 10 APRIL 2019**  
**Mt Eden Meeting House**

**Present:**  
 Claire Gregory, Daniel Jose, Heather Denny, Jim Flewitt, Linley Gregory, Nicholas Jose

The meeting began with silence and a reading.

**Minute 1: Correspondence**  
 The meeting notes the correspondence received and agrees to XYZ

**Minute 2: Treasurer's Report**  
 We approved the accounts as given and are pleased that we are within budget.

The Meeting ended at 12.15 with a period of silence.

### 13. SIGNING, PRINTING & SHARING

- a. When satisfied the clerk can change the Minute status to Signed and publish the pdf. (No watermark appears)
- b. When the SHARE button is pressed you have the opportunity to select who it will be shared with (include YM Clerks and NOM Coms when sharing). An email link to the final minutes will be sent to all selected recipients. To mail hard copies, the mail distribution list for creating labels is generated through the Mass Mail function (which needs Level 3 access and training to do which is given to mail distributors appointed by the Monthly Meeting).

The screenshot shows a web browser window displaying a meeting record page. The page title is "2019-04-10-NTMM-Northern Monthly Meeting". The main content area shows two minutes:

- Minute 1: Correspondence**  
Minute Type: General Minute  
Minute Status: Signed  
The meeting notes the correspondence received and agrees to XYZ
- Minute 2: Treasurer's Report**  
Minute Type: General Minute  
Minute Status: Signed  
We approved the accounts as given and are pleased that we are within budget.

Below the minutes, there are buttons for "Add Minute", "Print PDF", and "Share". The "Share" button is active, and a "Share via Email" dialog box is open. The dialog box contains the following options:

- Attendees
- Group Members
- YM Clerk (ymclerk@quaker.org.nz)
- MM Clerks (clerks@quaker.org.nz)
- Nominations Committee (nomscomclerk@quaker.org.nz)

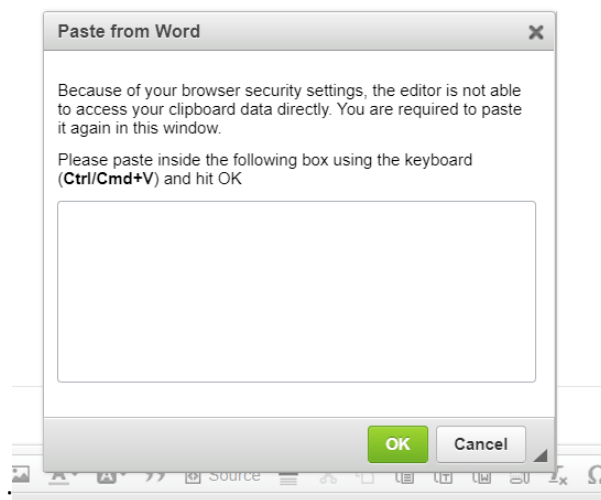
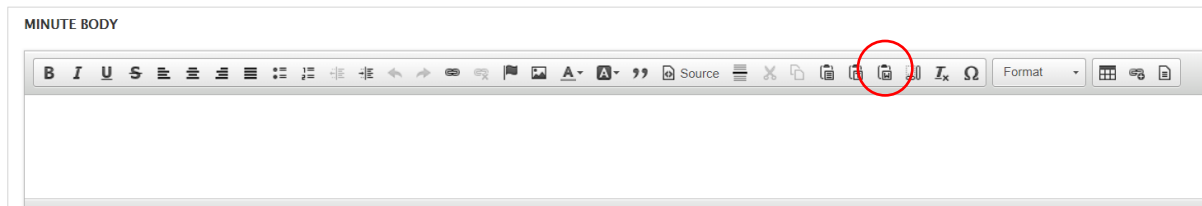
There is also an "Others" section with a text input field. Below the input field, it says "Separate multiple email address with comma". There is a "Submit" button and a "close" button.

The browser's address bar shows the URL: [quakerstage.kodait.com/nt/meeting-record/2019-04-10-ntmm-northern-monthly-meeting](http://quakerstage.kodait.com/nt/meeting-record/2019-04-10-ntmm-northern-monthly-meeting). The browser's taskbar shows the time as 7:01 PM on 10/04/2019.

## Option 2: CREATING A MEETING RECORD BY CUTTING AND PASTING FROM A WORD DOCUMENT

Do ALL the same steps as above but, when adding the minute body, instead of typing

- copy the minute from your Word document
- use the menu bar in the Minute Body box to select the **Paste from Word** button:



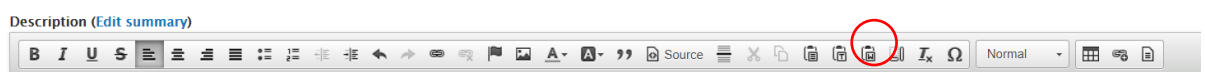
A window appears.:

Paste into the blank area and click OK. The text will go into the Minute Body. This method ensures that any formatting commands from Word do not over write the website fonts and settings.

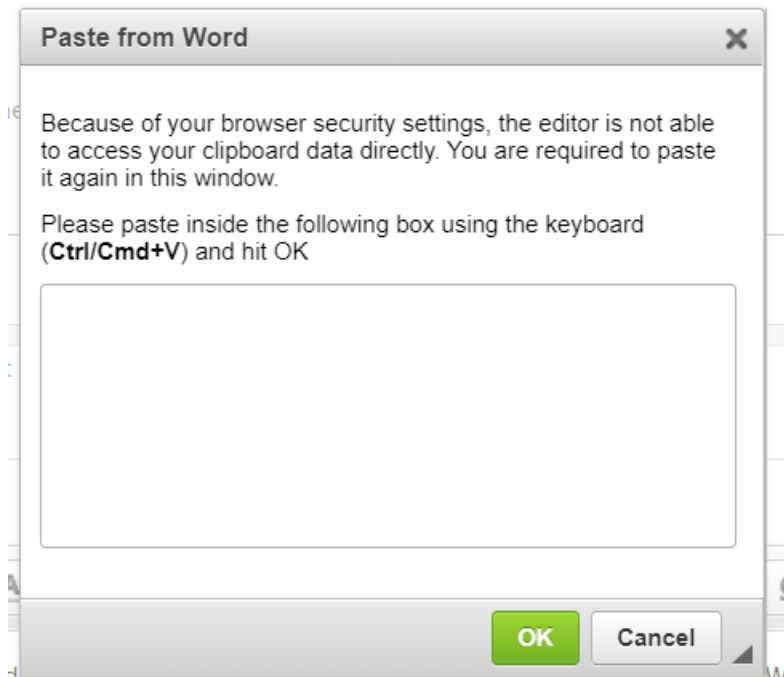
SAVE then continue to ADD MINUTE cutting and pasting in the above manner.

## Option 3: CREATING A MEETING RECORD BY COPY AND PASTING THE WHOLE SET OF MINUTES

- Create the Meeting Record as above and SAVE.
- Go into EDIT and scroll down to the Description field.
- Copy your whole set of minutes if typed in Word
- Use the **Paste from Word** button



- Paste the whole set of minutes into the box in the **Paste from Word** window



- 
- The whole set of minutes will now appear in the description field.
- The result is not a searchable collection of minutes but the Meeting record is online under the Minutes tab on your monthly meeting pages.

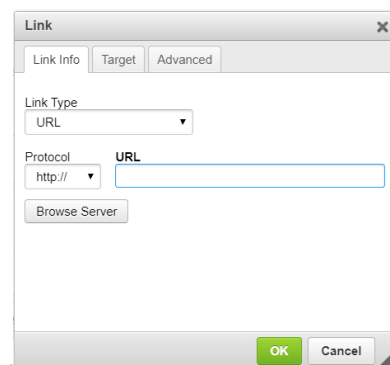
#### Option 4: CREATING A MEETING RECORD BY UPLOADING A PDF

Create a Meeting Record as for the previous options but instead of copying and pasting minutes, upload a pdf file into the description window.

- Prepare your pdf file by renaming it with an underscore hyphen \_ between words instead of spaces (otherwise they appear as 20% in the name online)
- Type a sentence in the description field such as Download minutes here
- Highlight the word **here**
- Go to the chain link icon in the menu bar

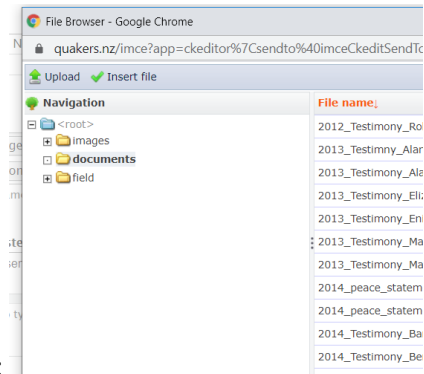


- 

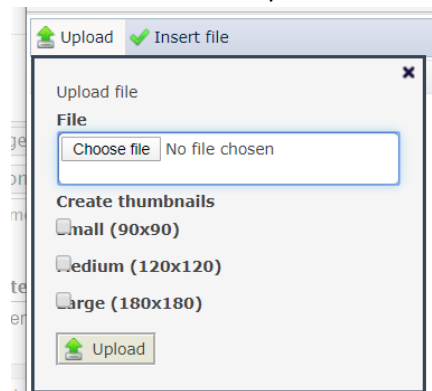


- A Link window appears: click on Browse Server
-





- The Server window appears:
- Under Navigation click on documents then click upload



- An upload window appears
- Click Choose file and browse your computer to select the correct pdf
- Click upload
- The file will upload and be shown in blue. Click insert file.
- You will return to the link window with the URL line filled.
- Click OK. Your file is now uploaded and a link has been made to the word [here](#) now shown in blue.
- Scroll down and SAVE.

## OPTION 2. COPYING & PASTING MINUTES into an online Meeting Record

Minutes can also be copied from a Word document and pasted into the minute section under Create Meeting Record. This will produce a fully searchable Meeting Record as above.

### 1. SETTING UP YOUR MEETING MINUTES RECORD

Follow steps 1 to 5 from above.

Click EDIT to continue

2. PASTING CONTENT FROM WORD FILES: you cannot paste correctly directly from Word but must use a special input port provided. This applies for the introduction, minutes and the ending statement.
3. Open your Word file and copy the content you wish to paste e.g. Opening or closing statement, or a minute.
4. Click the Word input button on the menu bar

Add New Minute

Minute Title \*

Monthly Meeting Appointments for 2019

Minute Status \*

Draft

If status is not Draft - then this content will be published.

Minute Type \*

Transfer IN

Minute Body template will change depending on the selected Minute Type.

Minute Body

Rich text editor toolbar with 'Word' button highlighted by a blue arrow.

body p

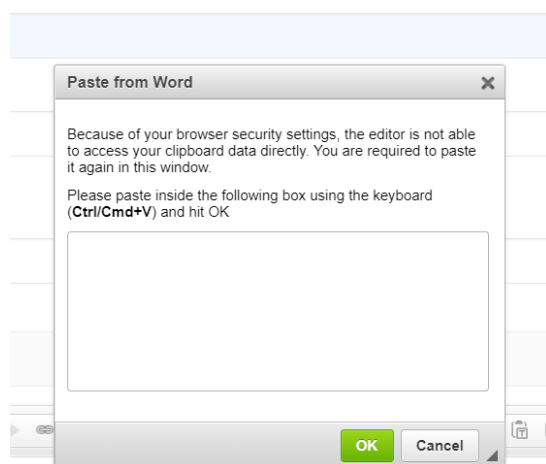
Disable rich-text

Filtered HTML

More information about text formats

TOP

6. A new window will appear. Paste your text into the box.



The content will appear in the minute body.

Minute Type \*

Transfer IN

Minute Body template will change depending on the selected Minute Type.

Minute Body

**B I U S** [List Icons] [Source] [Normal] [List Icons]

The meeting approves the transfer to Friend X to Northern Monthly Meeting.

body p

7. SAVE the minute.
8. Add a new minute until finished.
9. Add in the Introductory comments and Closing Statements in the same way using the Word input port button.
10. SAVE THE FILE which takes you into VIEW mode. You can see the whole Meeting record.
11. CONTINUE AS IN INSTRUCTIONS for Option1 (Steps 10-12).

### Option 3: COPY & PASTE THE WHOLE SET OF MINUTES UNDER THE HEADER

1. PREPARE THE ON-LINE MEETING RECORD
  - Follow Steps 1 – 5 for Option 1.
2. COPY YOUR CONTENT
  - Open your text file with the Minutes you have prepared off-line, copy the whole body of the minutes
3. PASTE YOUR CONTENT
  - Click on the Description free text field on your online template
  - paste the content of your clipboard **into the Word port button**
  - The text will appear in the text box online
  - You may need to adjust the layout.
4. SAVE THE FILE
5. CONTINUE AS IN INSTRUCTIONS for Option1 (Steps 10-12).

### Option 4: UPLOADING MINUTES AS PDFS FOR AN HISTORICAL ON LINE RECORD

1. Uploading old existing Monthly Meeting minutes onto the website server is a useful way to make old minutes accessible
2. An index to the pdfs which are on the server is shown in a suitable page in the Other Pages in the Monthly Meeting pages.
3. Each line in the index is linked to the pdf online and when clicked will open that file. It can be read on-line or downloaded onto your computer.
4. To learn how to upload files and link to the index page go the instructions for Uploading Files (not yet available)

