Building a Meeting Book

In this guide, you'll learn how to create a meeting book from scratch. This includes organizing it by category and subcategory, including an agenda and/or cover page, and even embellishing it with your organization's logo. (Your board will be amazed!)

1. From your home screen, click on the workroom where you'd like the meeting book to reside.

2. From the workroom navigation bar, click "Workroom Files."

3. From the subnavigation bar that appears, click "Meeting Books."

4. Click "+ New Book" and enter the title of your masterpiece.

5. If you'd like to use a template for your meeting book, select one from the drop-down menu.

6. If you'd like to include a cover page with your meeting book, check "Generate Coverpage." Make the design your own with features like "Add Logo" and "Edit Font Styling."

7. If you'd like to create an agenda, check the "Generate Agenda" box. From there, you can enter your agenda information and select appropriate agenda options. You can also customize the look of your agenda by clicking "Edit Font Styling."

   ### Step it up

   "Advanced Settings" gives you a few useful options, including password protection, including original files with the meeting book, and disabling the ability to print.

8. To create the first category of your meeting book, click "+Add Main Category." From there, enter the category name and, if you like, the time, presenter, action and additional notes. Then click "Submit." Repeat as necessary.

9. Add subcategories to any category by clicking "+Subcategory." From there, enter the subcategory name, time, presenter, action, and additional notes. Click "Submit."

10. To add files to your meeting book, simply drag and drop them to the main category or subcategory of your choice, or click "Select Files from Your Computer."

11. Click "Visible to Workgroup" to grant workroom members access to this meeting book.

> **They don't see until you say so**
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> Workroom members will not have access to your new meeting book unless or until you make it "Visible to Workgroup."

12. Click "Attach/Create Meeting" to attach your meeting book to an existing meeting, or to create a new meeting with the book attached.

> **Stop!**
>
> If you're editing your agenda or cover page, don't let your hard work go to waste. Remember to click "Save" when you're done to make sure your changes go through.