

How-to Guide: Edit Participants

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left overview solution

The purpose of this guide is to walk you through the steps necessary to add, edit, or remove participants. This will allow you to use the Roll Call and Motion & Voting features in agendas/minutes. If at any time you have questions regarding this process, please call our customer support line at <u>888-360-2822</u> or email us at <u>Support@AVCaptureAll.com</u>.

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Step 1: Launch AV Capture and open the Settings window.

Ø		Settings			_ □
👬 General					Hel
🏐 Shortcu	First Name	e Last Name	Title	Voter	Session
📔 Storage	Kim	Deal	Mayor 🔹	✓	All
🐙 A/V Inp	John	Smith	Council Chair 🔹		1 sessions
	Sun	Bak	Board Member 🔹	✓	2 sessions
A/ V Ou	Phillis	Wheatley	Commitee Chair 🔹	v	All
		Add F	Remove Dp	Down	
				_	

Step 2: Navigate to the Participants tab in the Settings window.

Step 3: To create and setup a new participant:

- 1. Click the (+ Add) button.
- 2. Type the first name.
- 3. Type the last name.
- 4. Using the dropdown menu, select the participant's title. There are a number of default titles to choose from.
 - a. If the desired title is not listed, click the Edit Titles link (as shown below). This will open the Edit Attendee Titles window.

		Se	ettings			_ [
General						He
Shortcuts	First Name	Last Name	Title	Voter	Sessions	
age	Kim	Deal	Mayor 💌	•	All	
/V Input	John	Smith	Council Chair 🔹		1 sessions	
utnut	Sun	Bak	Board Member 💌	-	2 sessions	
v Satput	Phillis	Wheatley	Commitee Chair 🔻	~	All	
Participants	James	Wilson	L T		All	
help			Mayor	7		
			Council Chair Council Member			
			Board Chain			
			Commite			
			Edit titles	1		
		E Add			Down	
		OK	Cancel			
		UK	Cancer			

b. Click the (+ Add) button (as shown below). Type the desired title (e.g. Chief Troublemaker) and click OK. The new title will now be available for selection in the dropdown menu.

Edit attendee titles Title Mayor Council Chair Council Member Board Chair	OK Cancel
Board Member	
Commitee Chair Commitee Member	
Add Remove	

- 5. Check or uncheck the Voter box to select whether the participant has the right to vote in meetings.
- 6. By default, new participants are associated with all session names. To change this:
 - a. Click the link in the Sessions column to access the Edit Associated Sessions window.
 - b. Select the Specific Sessions radial button (as shown below).

0	Edit Associated Sessions 🛛 🗖 🗖
Select the	sessions associated with Phillis Wheatley
	O ALL Sessions
	Specific Sessions <u>Check All</u> <u>Uncheck All</u>
	Town Council
	Planning Committee
	✓ Board Session
	OK Cancel
	OK Calcel

c. Check the box for each session name (i.e. meeting type) the participant is to be associated with and click OK.

Step 4: To edit an existing participant, use the same methods provided in Step 3.

Step 5: To remove an obsolete participant, simply select (i.e. highlight) the participant and click the (- **Remove**) button.

Step 6: Once the list of participants has been completed, it may be re-ordered using the (**▲** Up) and (**★** Down) buttons.

If you followed the steps above, your participants list should now be up-to-date and accessible when using Roll Call and Motion & Voting. If this is not the case, please call our customer support line at <u>888-360-2822</u> or email us at <u>Support@AVCaptureAll.com</u>.