



GOVENDA

Shared Annotations Quick Guide

Govenda's "Shared Annotations" feature allows users to share annotations they have made on a document within a board book with other users in their organization. This guide will walk you through how to maximize the feature.

Shared annotations are turned off by default. That means users will not be able to share their annotated documents with other users unless an administrator turns the feature on in the admin portal. In order to turn on shared annotations, the Admin should go to Settings > Document Settings and enable the toggle for shared annotations.

Dashboard / Settings / Documents

Document Settings

Allow my members to

- Print Documents
- Download Documents
- Annotate Board Book Documents
- Share their Annotations

The screenshot shows the Govenda interface. On the left is an agenda with items: I. Roll Call, A. Written Consent (with sub-items Annotations and Discuss), II. Minutes Review, and III. Approval of Meeting Minutes. The main area displays a document titled "ACTION BY UNANIMOUS WRITTEN CONSENT OF BOARD OF DIRECTORS OF" with a logo for "DADA docplex". The document text includes: "WHEREAS, it is deemed desirable and in the best interests of this corporation that the following actions be taken by the Directors of this corporation pursuant to this Unanimous Written Consent: NOW, THEREFORE, BE IT RESOLVED that, pursuant to applicable law, the undersigned, being all of the Directors of this corporation, hereby consent to, approve, and adopt the following: [Insert Resolutions] OMNIBUS RESOLUTIONS." A toolbar at the top right of the document area contains icons for text, image, comment, and drawing tools. A red box highlights this toolbar.

The functionality of annotating documents has not changed from our previous annotation functionality in terms of the actual annotations. The tool bar is now compressed to two drop down lists, giving the option to draw, highlight, add notes, etc.

Once an annotation is saved, the lock icon will appear in the document toolbar. The lock icon will open the privacy settings for that document's annotations. The options are Private, Selective or Open.

This icon is where you can see your annotations associated with the document.

Budget

% of Income Spent

Summary

Total Monthly Income	\$3,750
Total Monthly Expenses	\$2,058
Total Monthly Savings	

The "Private" setting means that only you will be able to see the annotations you have created.

Share Annotations

Access

- Private**
Only you can see your annotations
- Selective**
Only users you choose can see your annotations
- Open**
Anyone with access to the original document can see your annotations

Close

ding View < Previous Next > 1 of 1 My Annotations

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Justin Tysick

Approval of Minutes from Prior Meeting

Annotations

Agenda

Marketing Campaign Report

Ara Witherspoon Votes

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Share Annotations

Access

Private
Only you can see your annotations

Selective (highlighted)
Only users you choose can see your annotations

Open
Anyone with access to the original document can see your annotations

Who has access?

[Add Users](#)

Close

The "Selective" setting allows you to choose specific members from that meeting to have access to your annotations.

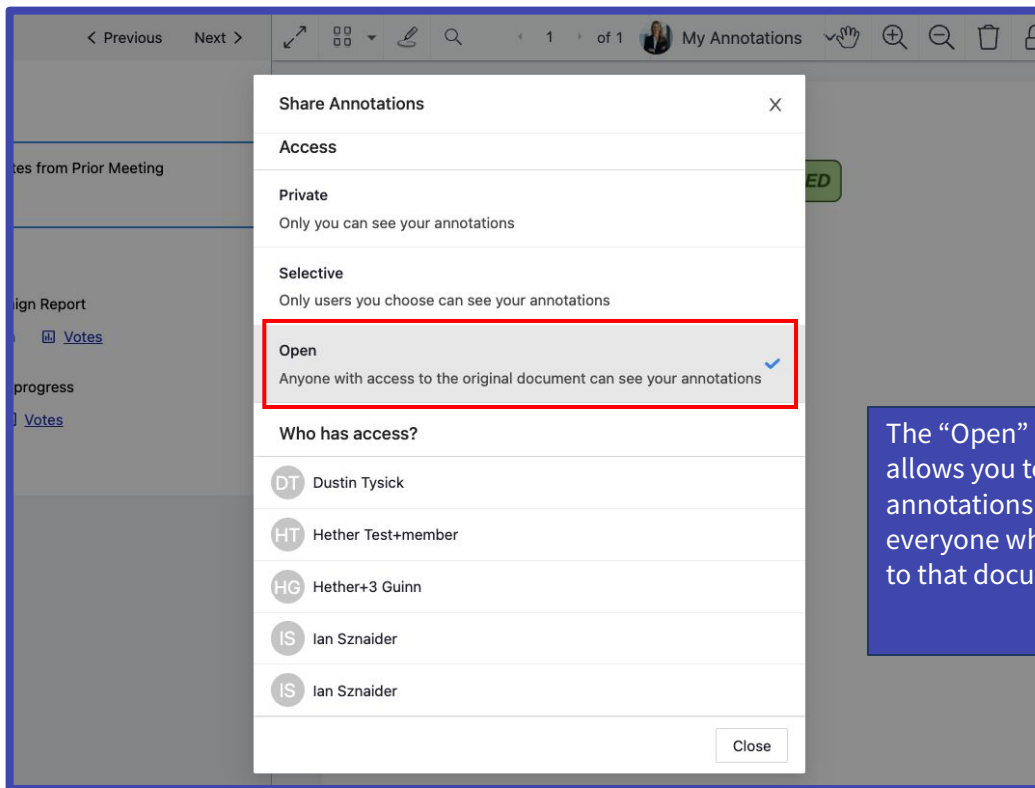
To select specific users, check the box next to the user's name". If there is someone in the meeting who is restricted from viewing the original document, you will not have the option to select their name.

Add User

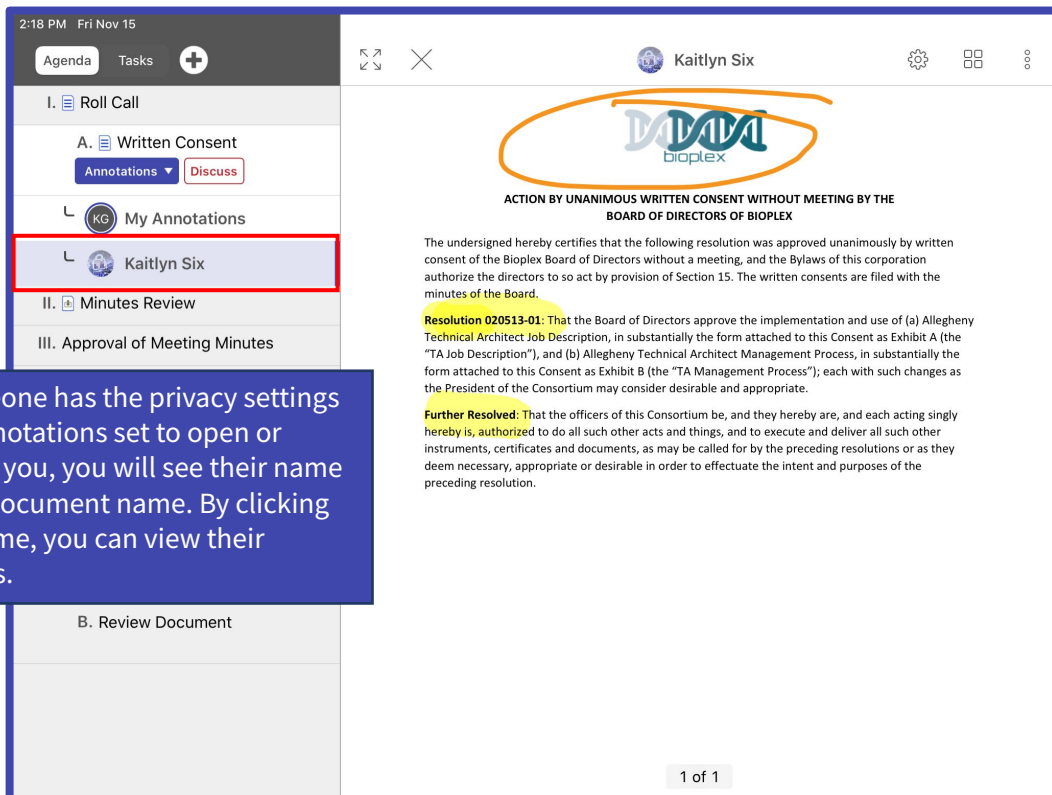
Search

- DT Dustin Tysick
- HT Hether Test+member
- HG Hether+3 Guinn
- IS Ian Sznaider
- IS Ian Sznaider

Close



The "Open" setting allows you to make your annotations open to everyone who has access to that document.



When someone has the privacy settings on their annotations set to open or selective to you, you will see their name under the document name. By clicking on their name, you can view their annotations.

The agenda now denotes whether there are annotations or discussions associated with each line item. When a document has an annotation associated with it, either yours or someone else's shared annotations, you will see annotations. When a document has a discussion associated with it, you will see a discussion bubble icon.

The screenshot shows a web interface for a meeting agenda. On the left is a sidebar with navigation options: Dashboard, Messaging, Meetings, Minutes, Directory, eSign, Financials, Documents, Surveys, Votes, Calendar, and Settings. The main content area is titled 'Special Tasks Quarterly Meeting' and includes a breadcrumb trail: Home / Upcoming Meetings / Special Tasks Quarterly Meeting. There are buttons for 'Add to Calendar', 'RSVP', and 'Create PDF'. Below the title are tabs for 'Meeting Details', 'Tasks', 'Agenda', and 'Minutes'. The agenda items are listed as follows:

- I. Opening
 - [Dustin Tysick](#)
- II. [Approval of Minutes from Prior Meeting](#)
 - [Hether Guinn's Annotations](#)
- III. Consent Agenda
- IV. [Marketing Campaign Report](#)
 - [Sara Witherspoon](#) [Votes](#)
- V. [Sales Lead hiring progress](#)
 - [Ian Sznaider](#) [Votes](#)
- VI. Closing