

HOW TO CREATE GOVERNANCE NOTES

Governance notes are created and stored within IGOR, the Institutional Governance Online Repository. They are developed from a template that is pre-populated with information from the meeting agenda.

Ideally notes should be:

Succinct (*briefly stated*)

Easy to understand ... even by someone who was not in the room

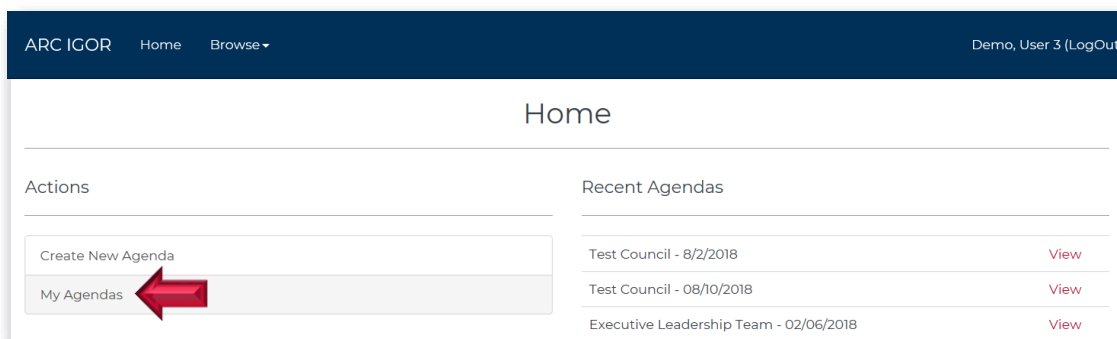
Simply worded, phrased in commonly used language rather than college jargon or academic terminology

Clear evidence of dialogue and decisions for accreditation purposes

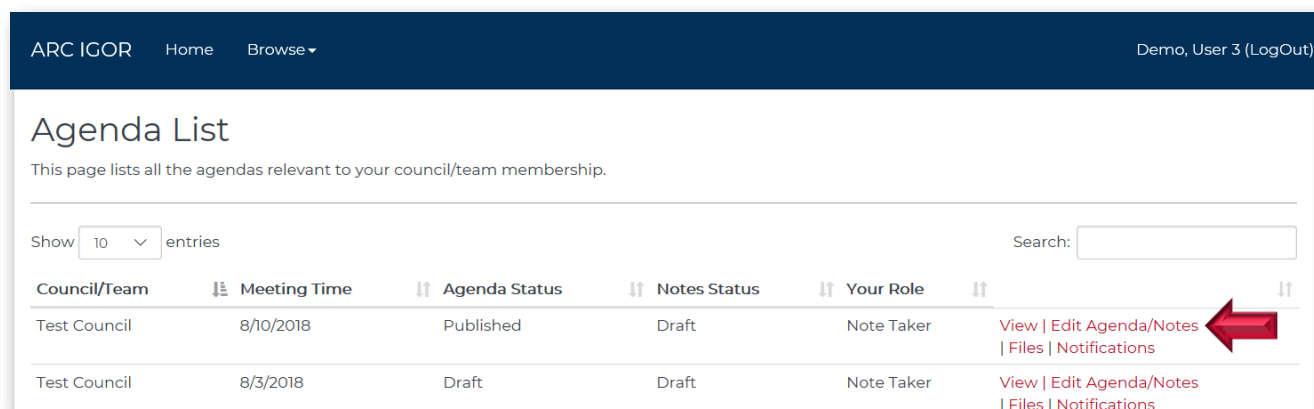
Quickly edited, approved, and published (*aspirational goal: within one business day*)

Creating Meeting Notes

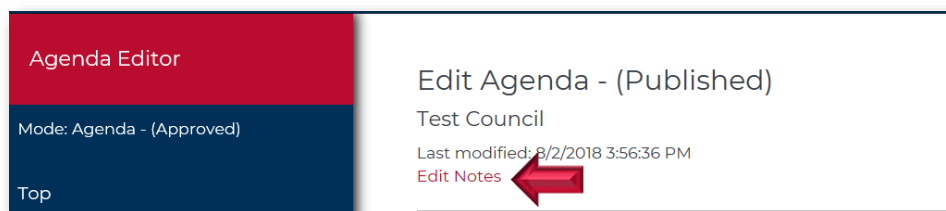
- **Login** to IGOR at <https://apps.arc.losrios.edu/IGOR> using your unified login
- Click **My Agendas** under Actions



- Find the agenda of the meeting for which you will be entering notes. Hint: Try searching by date.
- Click the **Edit Agenda/Notes** link next to the agenda.



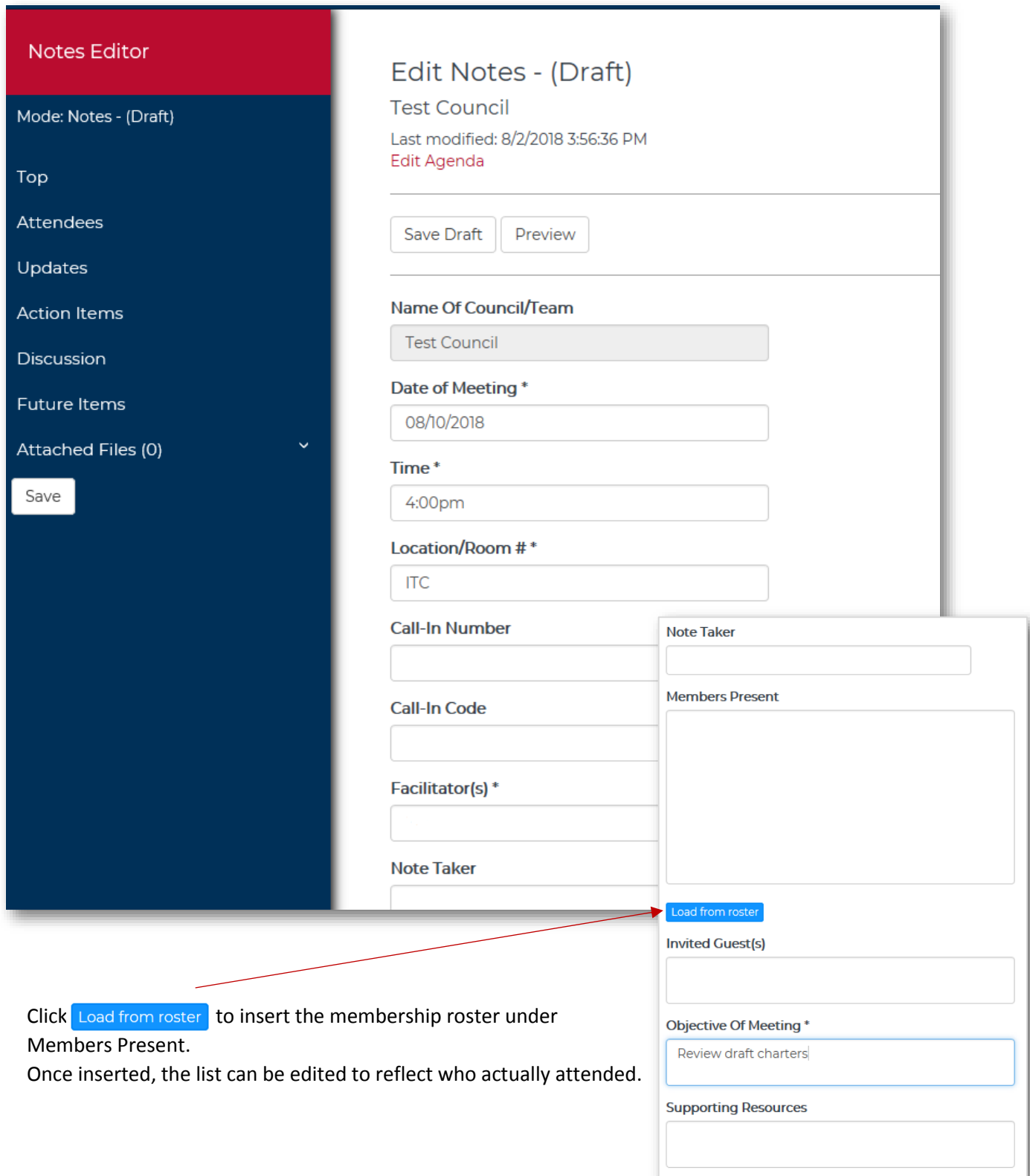
- Click **Edit Notes**



HOW TO CREATE GOVERNANCE NOTES

Begin drafting the notes. While notes are in draft format, they can only be viewed by the chairs/leads, note taker(s), and system administrator(s). This allows the draft to be reviewed and refined before making it available to the college.

- The top of the form is pre-populated with data from the agenda. **Check the data for accuracy and modify if needed.**



The screenshot shows the 'Notes Editor' interface. On the left is a dark blue sidebar with a red header 'Notes Editor'. The sidebar contains a 'Save' button and a list of navigation options: Mode: Notes - (Draft), Top, Attendees, Updates, Action Items, Discussion, Future Items, and Attached Files (0). The main content area is titled 'Edit Notes - (Draft)' and shows 'Test Council' as the subject. It includes a 'Last modified' timestamp of '8/2/2018 3:56:36 PM' and a link to 'Edit Agenda'. Below this are 'Save Draft' and 'Preview' buttons. The form fields are: 'Name Of Council/Team' (Test Council), 'Date of Meeting *' (08/10/2018), 'Time *' (4:00pm), 'Location/Room # *' (ITC), 'Call-In Number', 'Call-In Code', 'Facilitator(s) *', and 'Note Taker'. A modal window is open over the 'Note Taker' field, containing a 'Note Taker' input field, a 'Members Present' list area, an 'Invited Guest(s)' input field, an 'Objective Of Meeting *' input field (containing 'Review draft charters'), and a 'Supporting Resources' input field. A blue button labeled 'Load from roster' is positioned between the 'Note Taker' and 'Members Present' fields, with a red arrow pointing to it from the text below.


- Click **Load from roster** to insert the membership roster under Members Present.
- Once inserted, the list can be edited to reflect who actually attended.

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- The remainder of the form is used to record the notes for each topic, question, and/or item. Some information will display automatically based on the agenda, but can be modified for the notes.
 - Additional items can be included by clicking **Add Row**
 - The up/down arrows can be used to reorder the items
 - To delete a row, click **X**

Updates and Brief Reports

Topic	Person(s) Responsible	Time Allotted	Notes
<input type="text"/>	<input type="text"/>	Select One <input type="button" value="v"/>	<div style="border: 1px solid #ccc; height: 100px;"></div>
<input type="text"/>	<input type="text"/>	Select One <input type="button" value="v"/>	<div style="border: 1px solid #ccc; height: 100px;"></div>

Add Row 

Action Items







Question	Person(s) Responsible	Time Allotted	Notes And Decision(s)	Next Steps
<input type="text"/>	<input type="text"/>	Select One <input type="button" value="v"/>	<div style="border: 1px solid #ccc; height: 100px;"></div>	<div style="border: 1px solid #ccc; height: 100px;"></div>
<input type="text"/>	<input type="text"/>	Select One <input type="button" value="v"/>	<div style="border: 1px solid #ccc; height: 100px;"></div>	<div style="border: 1px solid #ccc; height: 100px;"></div>

Add Row

HOW TO CREATE GOVERNANCE NOTES


- Once you begin typing notes in the last column, you can choose to expand the box to make it easier to view.
- Click close at the bottom corner to return to the main editing page.

Discussion Items

Question	Person(s) Responsible	Time Allotted	Notes a	s
Welcome and Introduce	Adam Karp	5 min.	These are test notes for this item about what happened during the welcome and introduction.	  
Institutional Effectiveness:	Adam Karp, Bill Simpson	30 min.		  

Edit Value

These are test notes for this item about what happened during the welcome and introduction.

 Close

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- If new items were identified that need to be included on a future agenda, note them under “Items for Future Consideration”.
- Other Information – This box can be used to record any important information that does not fit elsewhere in the electronic form. For example, an upcoming event related to the council could be noted in this box.

Items for Future Consideration

Topic	Contact Person
Size of table	??
Progress	Jon

↑
↓
✖
↑
↓
✖

[Add Row](#)

Other Information

[Save](#)



- Click **Save**. (The save button saves any changes you have made but does not update the status. The notes will remain in draft status until the council chair or project lead decides to publish.)

Notes Editor

Mode: Notes - (Draft)

Top

Attendees

Updates

Action Items

Discussion

Future Items

Attached Files (0) ▼

[Add New](#)

[Save](#)

Adding Files

When appropriate, you can include separate files or links with the notes.

- Click on **Attached Files**
- Click **Add New**
- Select either **Link** or **File** from the drop-down menu
- Insert the details of the file or link (see examples on next page)
- Click **Add**

Upload Attachment

Test Council

Attachment Type: Select One ▼

File/Link Name:

ex. "ARC Home or Research Report"

[Add](#)

HOW TO CREATE GOVERNANCE NOTES

File Example:

Upload Attachment

Test Council

Attachment Type

File/Link Name ← Use a common or easily understood name for the document or file.
ex. "ARC Home or Research Report"

File Attachment

Link Example:

Upload Attachment

Test Council

Attachment Type

File/Link Name
ex. "ARC Home or Research Report"

Url
ex. "https:\\arc.losrios.edu"

- Ask the chairs/leads to preview the notes and make any desired changes. The chairs and leads have access to publish so the notes can be viewed by the council/project members and the public. When ready, the chair or lead should click the **Publish Notes** button near the top of the page.

Edit Notes - (Draft) Chair/Lead View

Test Council

Last modified: 8/2/2018 3:56:36 PM

[Edit Agenda](#)
