

Setting up a Paperless Agenda System A Quick Start Guide

March 2013

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1.0 Quick Start Guide

The purpose of this document is to provide the reader with straightforward information on how to set up a paperless Agenda process based on a simple and successful model. This paperless Agenda process can reduce costs for Agenda review, reproduction and mailing, while providing a common platform for various San Joaquin Valley government agencies. Some of the key objectives in choosing a platform for the paperless Agenda system include:

- Allow Board members to easily navigate the Agenda with minimal steps to open documents and different agenda items.
- Insure that Board Members have their own 'instance' of the agenda that they can easily markup, highlight and bookmark in a similar way they did on the paper Agenda.
- Create a simple and secure way to deliver the Agenda to the viewing device.
- Provide a simple user interface, suitable for users with varying levels of tech competency and that is resistant to user mistakes and viruses.
- Allow for quick Agenda document publishing and changes/updates.
- Provide a system that does not introduce significant new security concerns to agency networks.
- Provides a common portable platform that is compatible across multiple agencies.

Because this quick start guide is meant to provide for a quick and inexpensive installation that meets the above requirements, a couple of basic assumptions are made. First, the Agenda itself will be a PDF (portable document format) document, and second, the Agenda will be viewed on Apple iPads. This document shows step-by-step how to create the PDF Agenda document and how to purchase and set up Apple iPads.

1.1 Who this document is for...

This document is for anyone needing to set up a paperless Agenda process using the Apple iPad. This document offers a proven step by step process that will get you up and running with a paperless agenda system in as little time as possible. This system can serve as a base to build on so the needs of your organization, such as increased security, can be added as needed. In a nutshell this system will get you up and running with your Board members reading their Agendas on their iPads in minimal time. This guide can be used by someone with little computer knowledge, and is written to be as precise as possible for those without an available IT Analyst. Those with advanced technical knowledge might find the non-technical guidance the most helpful and the technical sections as a good starting point for your own analysis.

1.2 Checklist Summary

The following checklist summarizes the steps required to establish your paperless Agenda process on iPads.

- Create the Agenda Document (Appendix #1)
- Set Up Your Document Delivery Method (Appendix #2)
- Purchase the Apple iPad's and Supporting Software (Appendix #3)
- Create Your Use Policies (Appendix #4)

The first thing that you need to do to create a paperless Agenda system is to develop your electronic Agenda document. Appendix #1 takes you through all of the details for creating the Agenda document, but it is a simple Adobe portable document format "pdf" document with the appropriate links included to ease navigation.

Once the pdf document is created you need to distribute the Agenda document to your Board members. Some people just put the Agenda out on a web page and let their Board members save the document to their tablet device, but this quick start guide will focus on creating an server-based approach that will allow Board members to simply press a single button to download your electronic Agenda document. Appendix #2 includes all of the instructions that you need to establish an FTP download site for your electronic Agenda.

Now that you have everything in place for distributing the Agenda, you need to purchase the Apple iPads to view things with. There are a few choices to be made with the iPad hardware and software, and Appendix #3 gives you the information to purchase everything that you need.

The final piece of the puzzle is the policy and procedure documents that are needed for anything that you set up for your agency. These policy and procedure documents help insure that people know what to do and how to do it. Appendix #4 presents a policy on cost sharing through monthly allowances for Board members who wish to use their own (or another agency's) equipment, and also a Use Policy that details how Board members should use their hardware and software. This section also includes some example end-user training documents on working with their Agenda documents on the iPad.

2.0 Appendix #1 Agenda Document Creation

Checklist	Agenda Document Creation
<input type="checkbox"/>	Gather all your final documents saved in the PDF format (Section 2.1)
<input type="checkbox"/>	Merge all the PDF documents into a single PDF document (Section 2.2)
<input type="checkbox"/>	Create the outline/links to navigate the document (Section 2.3)
<input type="checkbox"/>	Make the text on the final document Searchable (Section 2.4)

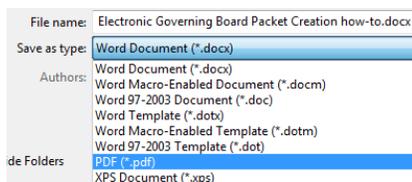
The process of creating the Agenda document starts at the point where you have the final Agenda submitted to the Clerk to the Board. Some agencies do this manually, while others employ an electronic Agenda Management System. In either case, this process begins at the point where the Clerk to the Board has the final (approved) Agenda packet. Therefore, this process has no impact on the underlying Agenda Item creation or approval process already in use at your agency. The Agenda document that you will create is a single PDF document that will have a clear outline (like a table of contents) used to navigate the electronic Agenda. The software needed to create this Agenda document is Adobe Acrobat Pro (version 9.0 or better). Only the person(s) creating the final Agenda will need a copy of this software.

2.1 Get all your final documents saved in the PDF format

PDF is a very common and flexible file format. If your Agenda documents are in paper form, you can use a scanner to scan the documents to PDF format. If your Agenda documents are in electronic form, they may already be in PDF format or can be converted to PDF format by the software that originally created the electronic document. For example the Granicus agenda management system can produce PDF documents, or Microsoft Office Word 2010 (or later) can save as a PDF document.

2.1.1 How to Convert a Word Document to PDF

- 1) Open word document in Word 2010 or later.
- 2) Go to 'Save As' to save the document.
- 3) Select .PDF as 'Save As Type'.

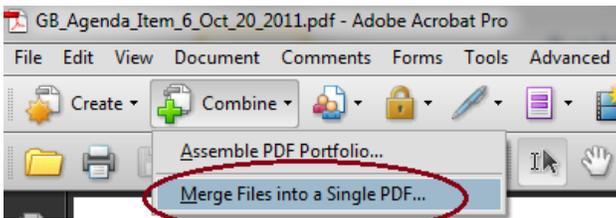


2.2 Merge all the PDF documents into a single PDF document

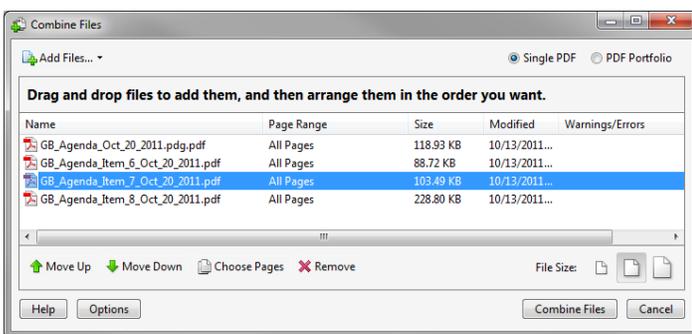
After you have all of the Agenda item documents in PDF format, you use Adobe Acrobat Pro to merge all of those documents into the single Agenda PDF document.

2.2.1 Merging PDF Documents into One Document, Step by Step

- 1) Open the first section of the agenda document (pdf version) in Adobe Acrobat.
- 2) On the menu bar select the “Combine” options then “Merge Files into a Single PDF”.
(File→Combine→Merge Files into a single PDF)



- 3) A new window will open up titled ‘Combine Files’
- 4) To add documents to merge simply drag and drop the items from where you have saved the individual agenda documents to the new ‘combine files’ window.
- 5) Drag and drop files in the order you want them to appear in the document (usually by agenda item number).
- 6) You can move the order of the documents in the ‘Combine Files’ window.
- 7) Select the ‘Combine Files’ Button when you have all the documents sorted in the order you want.



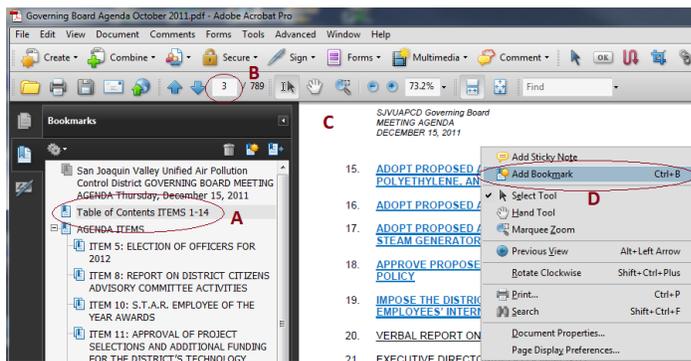
- 8) A ‘Save As’ window will appear allowing you to rename and save your new document combined document.

2.3 Create the Outline/links to Navigate the Document

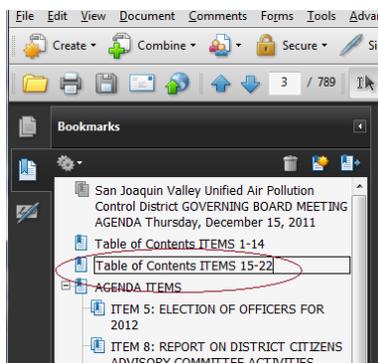
In order for the reader to navigate the final document without getting lost, an easy to use outline with links to each section of the document must be created. Section 2.3.1 has a step by step guide on how to create the outline with links using Adobe Acrobat Pro. One of the key concepts is that this process must be consistent in creating the bookmarks/outline in the same style and format every time to help with board members' ease of use.

2.3.1 Creating the Outline to Navigate the Final Agenda Document

1. In an open PDF document open the Bookmark menu by clicking on the second icon from the bottom on the left vertical menu. This is the bookmark icon that will open up the list of bookmarks on the document.
2. If this is a merged document there will be a bookmark for the first page of every merged document. You can just change the name of those bookmarks so you don't have to re-create them.
3. A) From the bookmark menu select the where you want the new bookmark to appear. B) and C) Make sure you are on the correct page where you want to create a bookmark of the PDF document (target page). D) Right-click on target page and select "Add Bookmark".



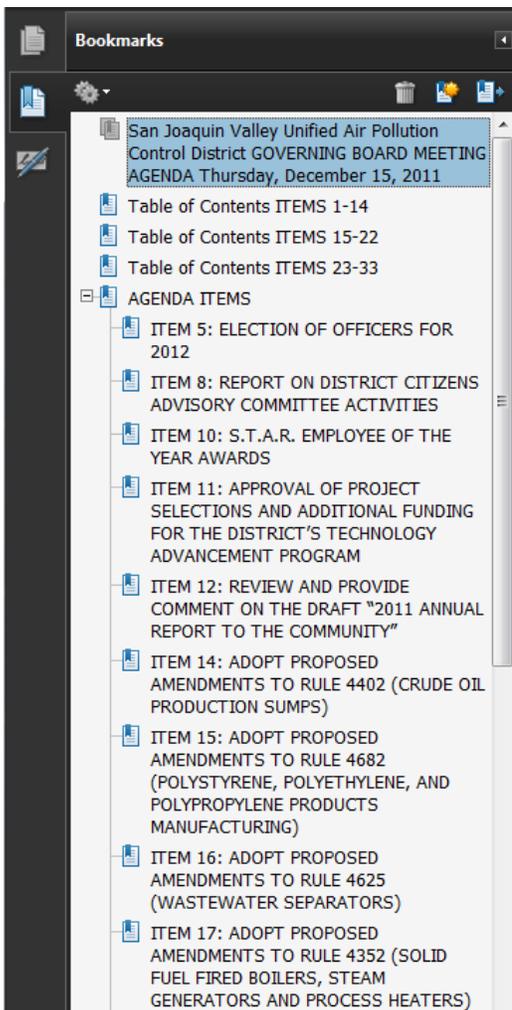
4. The bookmark will be created and named 'untitled' type in the name of the new bookmark.



5. If you want to change the name of an existing bookmark simply right-click on the bookmark and select 'rename' from the menu.
6. Repeat this process to the entire document.
7. Delete, drag and drop and create new bookmarks on the bookmark list as needed. The list appears on the iPad and is the primary method of users to navigate the document.
8. Make sure you are consistent, look at the previous board documents and use the same format for bookmarks.

SAMPLE COMPLETED BOOKMARKS LIST:

*1) The top bookmark goes to page 1 2)"AGENDA ITEMS" bookmark goes to the first page of the agenda list (usually page 2) 3) Individual agenda items are arranged in order as a sub-list under "AGENDA ITEMS" 4) Table of Contents bookmarks are added.

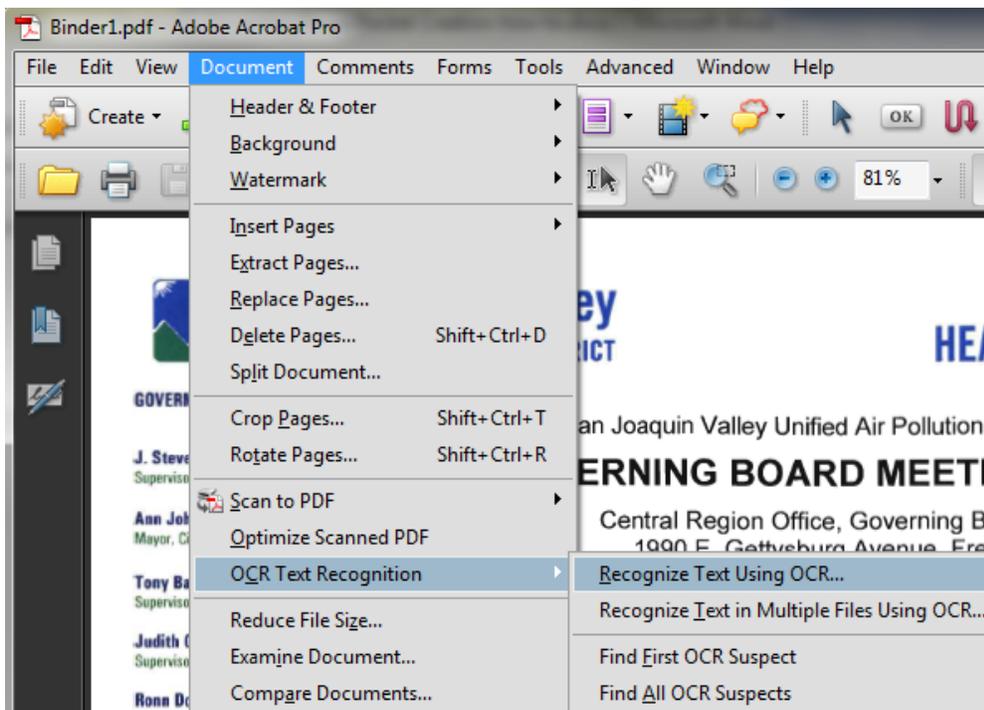


2.4 Make the Text in the Final Document Searchable

One of the great features of the new PDF Agenda document is the ability the reader has to search the document for any words or phrases. In order to allow the document to be searched, it must go through a process called OCR (Optical Character Recognition) using Adobe Acrobat Pro. This is a simple process that will take from a few minutes to an hour depending on the size of the document and the speed of your workstation.

2.4.1 Making the Final Document Searchable

1. Open completed Governing Board Document in Adobe Acrobat.
2. Select Document→OCR Text Recognition→Recognize Text using OCR



3. Select for all pages and keep defaults, then select 'OK' to start the OCR process.
4. A status bar will indicate when the process is running. When the status bar is gone the process is complete.

3.0 Appendix #2 Electronic Agenda Delivery System

Checklist	Electronic Agenda Delivery System
<input type="checkbox"/>	Set up the FTP server service (Section 3.1)
<input type="checkbox"/>	Purchase and Configure the PDF Expert Application (Section 3.2)

3.1 Setting up the FTP Server service

The next step in the process is to create a system to deliver the agenda to the Board member's iPad. There are many ways to achieve this goal, but this document is going to describe one proven method using the FTP (File Transfer Protocol) service.

Many organizations already have a FTP service available to them. Contact your Information Services Department to determine whether your organization has an existing FTP server. For those who do not have an FTP service available it can be purchased for a very reasonable cost. Section 3.1.1 is for those who have the FTP service already available in their organization. Skip to section 3.1.2 if you do NOT have FTP service available and need to purchase the FTP service.

FTP setup is one of the more challenging aspects of the paperless Agenda system. So if you are unsure about what to do, feel free to contact the San Joaquin Valley Air Pollution Control District's technical staff (Alex Aftanas or Ken Pretzer) for additional guidance.

3.1.1 Setting up the Agenda Download if you already have the FTP service available.

Your IT group will need to be contacted to start the process of setting up the available FTP service. You will need to get the following from your IT group:

- 1) Address (web address) of the FTP server.
- 2) Logon folder path for the Agenda drop area.
- 3) FTP Admin Userid/password with Read/Write/Modify access to your Agenda FTP folder.
- 4) FTP Guest Userid/password with Read/Execute only access to your Agenda FTP folder.
- 5) Instructions for you to access your Agenda FTP folder and add/remove agenda documents.

When creating the logon folder path for the Agenda (#2 above) note that this folder name, and the name of any sub folders under it, is going to be displayed on the iPad.

3.1.2 Setting up the Agenda Download if you need to purchase the FTP service.

There are numerous external FTP services available on the Internet, but this document is going to focus on services available from Drive Headquarters (www.drivehq.com/ftp). The reason this service was chosen was for its low cost, quick setup, available technical support, and ease of use. There is a monthly charge for this FTP service and you will need a credit card number to complete the setup. See section 3.1.3 for specific Drive Headquarters FTP setup instructions.

3.1.3 Sample FTP service setup

Set up your FTP account using Drive Headquarters service

You need the following to start your FTP service purchase:

- 1) Credit Card or PayPal Account.
- 2) User ID and Password to set up your new account.

Go to <http://drivehq.com> or call (800)836-0199 to set up your new FTP account.

Sign up for a standard FTP account (or better). Sometimes this type of plan is called a “Paid Group Account”:

Standard Plans

- Includes great FTP client software, server & hosting; plus other cloud storage & cloud IT services.

5GB(+1GB Free) + 20GB download/month

Then you need to set up a “sub” user account with read-only access to your FTP shared folder.

As of 2/2013 the prices are: Monthly: \$7.99 + .60 for “sub” user account, **or** 79.99/year.

You will need to create a folder unique for your organization that will show up on the Board Member’s iPads. In this example we created a FTP folder called “AirBoard” and created a “sub” user account named “Agenda Downloader”. The AirBoard folder has “download & view comments” rights for “Agenda Downloader”. The properties page for this example is shown below:

The screenshot shows the 'Share' configuration page for the folder '\AirBoard'. At the top, there are tabs for 'Publish' and 'Share'. Below the tabs is a table with the following data:

NO	Share Name	Create Time	Permission Level
1	AirBoard	02/19/2013 16:01:57	download & view comments

Below the table, there is a link: "If you want to create a new share, please click [new share](#)."

Share to : Share to Your Group *

Emails or DriveHQ usernames, separated by ";"

AgendaDownloader

Enter DriveHQ usernames or email addresses, or

- > [Select from Your Group](#)
- > [Select from Your Contacts](#)
- > [Manage Your Contacts](#)

Share Link: <https://drivehq.com/sharing/ShareLogon.aspx?password=107136>

Share Name: AirBoard *

must be unique; use only alphabet, '-', '_' and space

Description: Meeting agendas to download to iPads *

Permission Level: download & view comments ▾

Expiration Date :

- Never expires
- Send share change notification
- Save access log

Buttons: Save, Close

The AgendaDownloader sub account will get a verification email that will have a web link that needs to be clicked on to complete the set up.

After verifying the share email you can then use the sub account to access the folder you created. In this example the following has been set up:

- 1) A main user account for adding/deleting folders in the FTP site.
- 2) A sub account to set up on the iPads to download the Agendas from the FTP site (sample subaccount: AgendaDownloader)
- 3) A FTP shared folder that gives read only access to the sub account (folder: Airboard)
- 4) A login path for the AgendaDownloader subaccount to the shared folder:
/drivehqshare/sjvapcd/airboard/

Further instructions are here:

<https://drivehq.com/help/Support.aspx>

3.1.3 Designing and creating FTP folders

Designing and creating FTP folders is important because it is what is visible to Board members, so it must be easy to understand and navigate. One of the key things to keep in mind is that the Board members will be downloading several Agendas from agency Boards that they serve on, so the naming convention needs to take this into account. Another key aspect of the FTP folders is naming the folders in a way that the folder that contains the Agenda documents the Board member is looking for can be easily identified and sorted. In section 3.1.4 the example shows folders under the main folder sorted by month and year, in this example the board meetings occur no more than once a month. Your agenda schedule may be in different intervals but concepts are the same, take in account how you want the Agendas sorted for the Board Members on the iPad and how you need to name the folders to accomplish this.

3.1.4 Sample Folder Design

This sample shows a recommended design of the FTP folders. This design is synchronized with the iPad. In this example the Agendas are monthly and there is a presentation folder under each month.

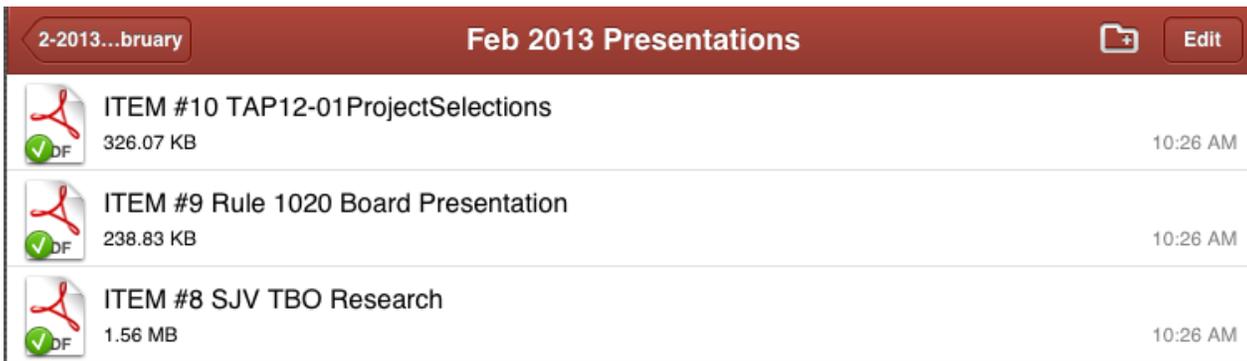
From the Main “Documents” Page to the “Airboard” folder.



Opening “2-2013 February” folder.



Opening the “Feb-2013 Presentations” folder.



3.2 Purchase and configure the PDF Expert Application

The software used to download and read the agenda document is *Readdle's* PDF Expert. This software is available in the Apple Appstore using an Apple ID. It is recommended that the software is purchased with a unique Apple ID for each device using iTunes pre-paid gift card. You can purchase a \$15 pre-paid iTunes gift card in most Grocery or Drugstores, as well as online. Before setting up your Apple ID's you should have purchased at least one pre-paid iTunes gift card (at least \$10) for every iPad. Each iTunes gift card can only be used with one Apple ID/iPad.

The Apple userid can be created in many ways, including on the iPad itself, but going to the Apple website is an easy method to create multiple accounts all at once.

3.2.1 Setting up the Apple ID

An Apple ID can be created on the iPad or by going to the Apple website. All of the purchase confirmations and communications from Apple will be sent to this email address. Each Apple ID must be unique and have a unique email address associated with it. If you do not have access to an email system to set up the email accounts you can create free accounts using a service such as Gmail. Go to gmail.google.com to create a new email account, section 3.2.1.1 shows a sample Gmail account set up. This email can be “aliased” so that multiple email addresses can use the same master Gmail account. Aliasing a Gmail address is explained here: [Gmail Aliasing](#)

The Apple website method is simple to use for deploying multiple iPads. You will need to create one Apple ID for each iPad. The Apple ID can be transferred to a replacement or a new iPad as needed. It is recommended that you create each Apple ID in the same way (same birthdate, same challenge questions, same address etc...), only the Apple ID itself needs to be unique. The web site to create an Apple ID is here: appleid.apple.com .

The Apple ID creation process requires (in order):

- 1) A unique working email address name
- 2) Common set up answers for every new Apple ID (challenge questions, address, birthdate, etc...)
- 3) A unique Apple ID for every iPad issued.

3.2.1.1 Sample Gmail account

Name

Board Agenda

Choose your username

Board.Agenda 100 @gmail.com

Create a password

.....

Confirm your password

.....

Birthday

January 1 1960

Gender

Other

Mobile phone

USA

Your current email address

Alex.Aftanas@valleyair.org

Default homepage

Set Google as my default homepage.

Your default homepage in your browser is the first page that appears when you open your browser.

Prove you're not a robot

Skip this verification (phone verification may be required)

favor **BUYPASS**

Type the two pieces of text:

favor Buypass C 🔊 ?

Location

United States

I agree to the Google [Terms of Service](#) and [Privacy Policy](#)

Google may use my account information to personalize +1's on content and ads on non-Google websites. [About personalization.](#)

3.2.1.2 Sample Apple ID

1. Go to the webpage to create an Apple ID <https://appleid.apple.com/cgi-bin/WebObjects/MyAppleId.woa/wa/createAppleId>
2. Below is an example of how to fill out an Apple ID application. An “aliased” email address of Board.Agenda100+001@gmail.com is used in this set up.

Create an Apple ID.

Choose an Apple ID and password.

Enter your primary email address as your Apple ID. This will be used as the contact email address for your account. Please note that this email address must be verified before you can use certain Apple services.

Apple ID

Password

Password strength: **moderate**

Confirm Password

Create a security question.

Select a security question or create one of your own. This question will help us verify your identity should you forget your password.

Security Question

Answer

Select your birth date.

Combined with your security question, this will help us verify your identity if you forget your password or need to reset it.

January 01 1960

Enter your name.

Please enter your full name.

First Name

Middle Name

Last Name

Enter your primary address.

Please enter your mailing address.

Country/Region

Company/Institution

Address Line 1

Address Line 2

Town/City

State/Province

Zip Code

Preferred Language

Preferred Language

Contact Preferences

Stay up to date with Apple news, software updates, and the latest information about products and services from Apple. Please note: Email messages appear in the official language(s) of your country of residence.

[Read the Apple Customer Privacy Policy](#)

Communication from Apple

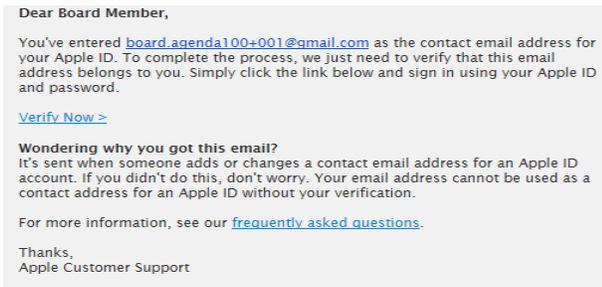
Email
Apple news, software updates, and more.

Newsletters

New on iTunes and Other iTunes Offers
Every week, iTunes adds the latest new releases for music, apps, movies, TV, books, podcasts, and much more — plus exclusive content you'll only find on iTunes. Sign up for New On iTunes and other iTunes offers.

3. Notice that except for the “Apple ID” itself you can use the same answers for every question for every Apple ID you create. This is very helpful in supporting these IDs.

4. You'll then see a "Verify your Account" screen. Click Done, and then check your email for a verification email from iTunes Store.
5. Open the email, and click the link enclosed in the email to activate your account.



6. Once you click on the link, the Apple ID website should ask you to sign in with your account name and password.
7. After signing in, you should see that your email address is associated with your Apple ID. You can then load your iTunes gift card in the account.

3.2.2 Purchasing PDF Expert

One instance of the PDF Expert program needs to be purchased for every iPad. In order to purchase, download and install the PDF Expert program on an iPad you need: the iPad, a unique Apple ID and a new iTunes pre-paid gift card (at least \$10).

First enter the Apple ID on the iPad as described in section 3.2.3 "Setting an Apple ID on the iPad".



Then go to the "AppStore" icon:  and enter "PDF Expert" on in the search field to the top right.



Tap on the  icon to purchase the application. You will then be prompted to agree to terms of service and enter your payment method. Enter your iTunes gift card information and then tap "install" to download and install the application. The PDF Expert icon will then appear on the iPad desktop.

3.2.3 Setting an Apple ID on the iPad



- 1) Open the "Settings" icon on the iPad: 
- 2) Go to the "iTunes&App Stores" section and enter the Apple ID and password information.



3.2.4 Configuring PDF Expert for the Agenda Download and Synchronization

For this section you need to have the information on your FTP set up. If you used your internal IT group to help set up your FTP system then you need to gather the information you obtained in section 3.1.1 to set up the PDF Expert Agenda Download and Synchronization. If you set up your FTP download service using the Drive Headquarters vendor then see the vendor support documentation for the appropriate information. Section 3.2.4.1 also shows a sample FTP Server setup page using the Drive Headquarters vendor.

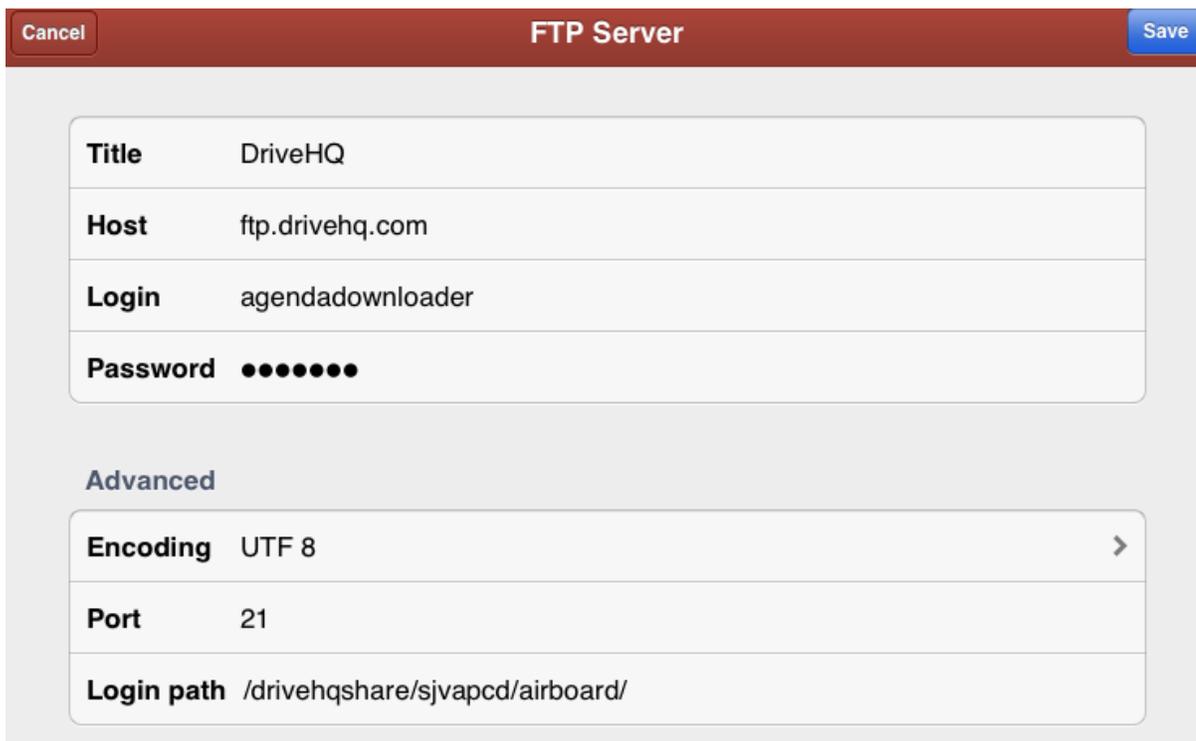
- 1) Tap on the PDF Expert icon on the iPad desktop to open the application.
- 2) Tap on the “Network” button on the navigation pane on the left side.
- 3) Select “add” on the top left
- 4) Under add server select the “FTP Server” option.
- 5) Fill out:
 - Title: (create unique name for your FTP download service)
 - Host: (hostname or IP address of FTP server)
 - Login: (user id with read only access to the FTP site)
 - Password: (password for user id)
 - Encoding: (leave default)
 - Port: (leave default)
 - Login path: (path in FTP site to the Agenda Documents)
- 6) Select “Save” on the top right of the FTP Server screen.
- 7) Select “Done” on the top right of the Network screen.
- 8) Select the FTP Server you just configured under the “Favorite Servers” section.
- 9) Select the **Sync** button on the top right to create an automatic synchronization of documents in the FTP server.

See section 3.2.3.1 for an example PDF Expert FTP network setup using the Drive Headquarters FTP service.

3.2.4.1 Sample FTP Download server setup on the iPad (PDF Expert)

Open PDF Expert and go to “Network” → “Add” → “FTP Server”

In this sample FTP Server setup the “Drive Headquarters” service is being used. In the FTP service a “agendadownloader” sub account was created, and a shared folder was created with the main FTP account called “airboard” and shared with the “agendadownloader” account.



FTP Server	
Title	DriveHQ
Host	ftp.drivehq.com
Login	agendadownloader
Password	●●●●●●
Advanced	
Encoding	UTF 8 >
Port	21
Login path	/drivehqshare/sjvapcd/airboard/

4.0 Appendix #3 iPad and Hardware.

Checklist	iPad and Hardware
<input type="checkbox"/>	Purchase the iPads (Section 4.1)
<input type="checkbox"/>	Purchase iPad accessories (Section 4.2)

4.1 Purchasing the iPad

There are several choices to make in purchasing the right iPad for your paperless Agenda system, and this document will include significant detail about each of these decision areas. However, we will begin with a simple recommended list for those who wish to avoid the technical details.

- Apple iPad 4, Black, 16GB, cellular data ready (you choose your cellular provider)
- Targus Versavu Rotating Case & Stand for the iPad 4 (Black, item #THZ156US)
- \$15 iTunes card (you will use this card to purchase the software below)
- Readdle Inc., PDF Expert software
- Activate the cellular data plan of your choice (AT&T, Sprint, or Verizon)

That is really all you *need* to get started. There are other options available (e.g., screen protectors, spare chargers, stylus, etc), but those can wait.

The following sections discuss in more detail the choices that are available for the various components described above.

Minimum requirements for the iPad:

- 1) iPad2 or later
 - a. Operating system iOS 6.0 or later. (only an issue if purchasing used equipment)
- 2) 16GB of space.
 - a. This is enough space for at least 100 agendas. If the iPad is going to be used for other services such as email and agenda from multiple agencies you may want to purchase the 32GB or larger model.
- 3) Cellular data connection ready (such as at&t wireless, Sprint, or Verizon wireless)
 - a. Order as “cellular data ready” and have your cellular data provider selected.

It is recommended to purchase iPads from cellular data providers (like at&t, Verizon, or Sprint) or an Apple store. The iPads can also be purchased from various other retail outlets. New iPads come with the iPad, a charger and a USB/Charging cable.

4.1.1 Cellular Data

Purchasing Cellular Data service with each iPad is recommended for several reasons.

- The mobility of the device is enhanced, allowing for downloading the agenda in any area with a cellular connection.
- It eliminates any support for board members that may get frustrated trying to connect to various Wi-Fi connections.
- It helps in supporting the iPads if they are all configured in the same way. Also it helps to have another technical resource (the cellular data provider) if there are problems with the unit.

4.1.2 Cellular Data Plan

The cellular data plan you should choose depends on three basic factors: 1) the data coverage in areas frequented by your board members 2) the size and frequency of the agenda documents they will download 3) the other services or agencies using the iPad.

As a simple starting point one gigabyte (1GB) of cellular data a month is recommended. The data can be monitored (ask your cellular data provider to help with this) to see if the cellular data usage limit should be increased.

4.2 iPad accessories

The *recommended* accessories to purchase with the iPad:

- 1) iPad Case
- 2) Spare chargers/ Board room chargers
- 3) Screen Protector (Optional)
- 4) Stylus (Optional)

4.2.1 iPad Case

The iPad case should fit well, protect the iPad from most accidental drops, and allow for flexible viewing of the iPad. The iPad case style that has seemed to fit those requirements the best is the “rotating” cover case. Two good examples are built by Devicewear and Targus available from various online retailers, including Amazon.com.

Targus:

Targus Versavu™ Rotating Case & Stand iPad® 3 and iPad® 4 (Black)

THZ156US

Targus Versavu™ Case & Stand for iPad® 2

THZ045US

Devicewear:

Rotating iPad 2/3/4 case: Detour 360 by Devicewear - Black Vegan Leather New iPad Case With On/Off Switch (Compatible with 2nd generation, 3rd generation, and 4th generation iPads)

DET-IP3-BLK



4.2.2 Spare chargers and cables

Spare chargers are recommended to replace any misplaced or damaged chargers/cables. Extra chargers are may also be needed for board members to charge their iPads during the meeting. Various models of charger are available from the Apple store or various other retailers any charger will usually work for most purposes. It is important to be aware of the type of connector used by your purchased model of iPad e.g. the iPad2 uses a different connector than the iPad4. Also you might have a need for a longer charging/USB cable, be aware that cheap longer charging cables may not work well. The recommendation is to purchase a USB extension cable versus a longer charging cable. A proven choice is the C2G (Cables to Go) USB A/A M/F Extension Cable (Pictured Below).



It is recommended that board members have the option to charge their iPad devices while they are seated at the meeting using the device. This will accommodate any board member whose iPad is low on charge before coming to the meeting. This can be accomplished with a simple power strip and/or sufficiently long cable. Another example is to install power outlets near the board member's seating area as seen in the example below.



(Power outlet that pops up on the table)

4.2.3 Screen Protector

Screen protectors are recommended in most cases to protect against scratches to the screen. Screen protectors are inexpensive and can be found at various online retailers, such as Amazon.com. You must be aware of the iPad model you have purchase to purchase the correct fitting screen protector. They can be a little tricky to install the first time so purchase a few extra to allow for problem installs. You can choose to go without this little extra insurance as the newest models of iPads are very scratch resistant.

4.2.4 Stylus

A stylus is a 'pen' like device that can be used on the iPad touch screen instead of the user's finger. A stylus is an optional accessory for the iPad. In general most users do not use the stylus at all or only for a short time. It is recommended that you purchase styluses and make them available on request. A good starting point is one stylus for every iPad purchased. Stylus' can vary wildly in price and seem to have mostly the same performance. One that has been tested is the *"YooMee Black Capacitive Touchscreen Stylus with tether"* this stylus comes with a tether that attaches to the audio port of the iPad.



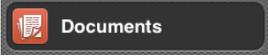
5.0 Appendix #4 Training, Documentation and Policies

Checklist	Supporting/Training, Documentation and Policies
<input type="checkbox"/>	End-user Training (Section 5.1)
<input type="checkbox"/>	Create operation documentation (Section 5.2)
<input type="checkbox"/>	Create supporting policies and procedures (Section 5.3)

5.1 End-User Training

End-User Training is a key in making the transition to Agendas on iPads successful. There are a few key areas that every board member needs to be proficient in order to use the iPads, downloading the agenda (Section 5.1.1), reading/navigating the agenda (Section 5.1.2) and annotating the agenda (Section 5.1.3). The recommendation is to go through each of these key areas with the Board Members personally before the first paperless Board meeting. Some board members will need to have basic instruction on how to use touch gestures such as swiping, advancing pages, tapping the center of the screen to bring up a menu, and using the home and start button. It is also important to remember that the documents below are just starting points for end-user training. In most cases you will want to expand on the following documentation such as showing board members more ways to annotate a document.

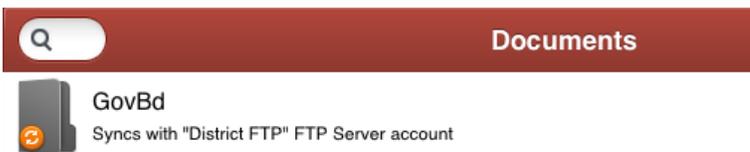
5.1.1 Downloading the Agenda on the iPad

1. Open PDF Expert and navigate to the main page.
 - a. Tap on the PDF Expert icon on the iPad to open the PDF Expert program.
 - b. If the program opens up to a document such as the Board Packet first simply tap on the button on the top left (circled in the picture below) to return to the main PDF screen (tap center of the screen if the button is not present).
 - c. On the main page tap the “Documents” button two times. 

2. Synchronize the Board Agenda folder.
 - a. Tap on the “Sync” button on the lower left hand part of the main screen one time you **may** see a choice of “Push Changes Only” and “Full Sync”, **always choose “Full Sync”**
 - b. The button will change with the message “Syncing...” and a progress bar, when it is complete the progress bar will be gone and it will return to just “Sync”.



3. Open the Governing Board Packet document.
 - a. You may have multiple documents and folders on the main page, the folder that will contain the most current documents that have been synced will have it written under the folder such as “Syncs with “District FTP” FTP Server account” shown below. Select this folder by tapping it once.

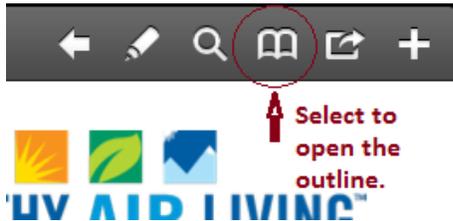


- b. Select the correct document you want to view by tapping on the title once.

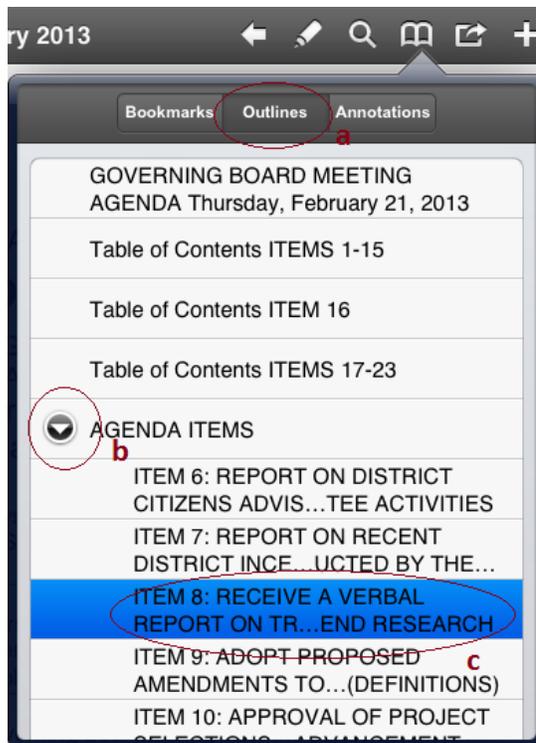
5.1.2 Using the Index to Navigate a Document in PDF Expert

Sample end-user document:

- 1) Open the PDF Expert program and open the Agenda document.
- 2) You should see a grey menu bar across the top of the page. If you don't have the menu bar just simply tap on the center of the iPad screen once to bring up the menu bar.
- 3) Tap on the "book" icon on the top right, to open the Index of the document.



- 4) A new window will appear with the document index. In this example the top line "GOVERNING BOARD MEETING AGENDA Thursday, February 21, 2013" goes back to the first page of the document.
 - a. Make sure the "outline" button is select on the top center of the new window.
 - b. Open and sub-menus by tapping once on the arrow button.
 - c. Select any line to jump to the first page of any agenda item or a page of the table of contents. The example below shows agenda item #8 being selected.



- 5) Tap on the center of the screen to close the index window.

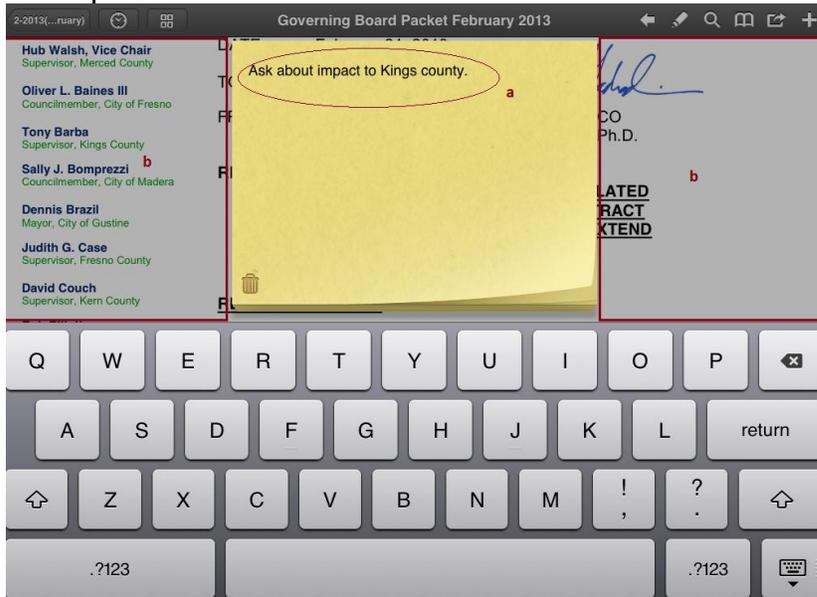
5.1.3 Annotating a document: “Post-it note version”

Sample End-user document:

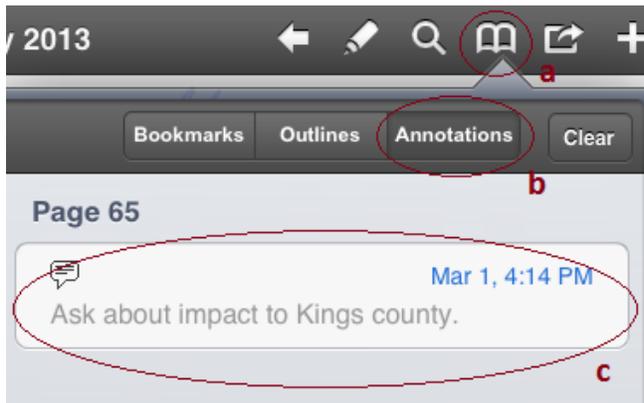
- 1) Open the PDF Expert program and open the Agenda document.
- 2) Navigate to the page in the document you want to put a note on.
 - a. Touch and hold in the area of the document you want to place the note until the menu shown below pops up (about 3 seconds).
 - b. Select the “note” option on the menu.



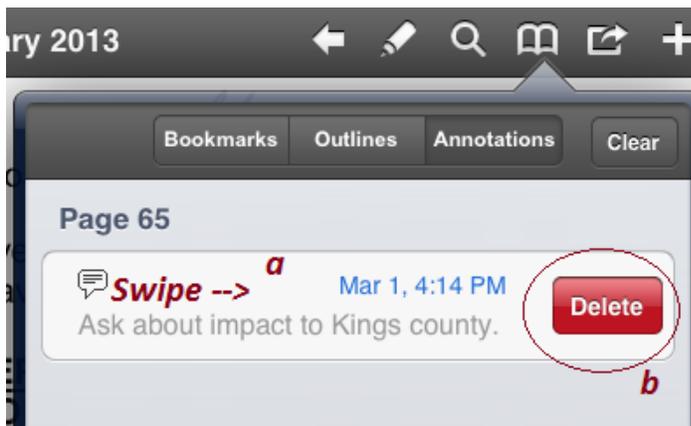
- 3) A window and keyboard will then appear.
 - a. Type the note you want to save using the on-screen keyboard.
 - b. Tap outside of the note on the screen to close the note.



- 4) An icon will appear on the page that you can tap to open the note: 
- 5) The note will also appear under “annotations” under the book icon.
 - a. Tap on the book icon to the top right.
 - b. Select the “annotations” button.
 - c. Select the annotation to be sent to the page containing the annotation.
 - d. Open the Note annotation by tapping the not icon on the page: 



- 6) To delete all of your annotations tap on the “clear” button.
- 7) To delete any individual annotation open the book icon and select the “annotations” button.
 - a. Swipe from left to right on the annotation listed you want to delete, a delete button will appear on the same line on the right.
 - b. Select the delete button to delete the annotation.



5.2 System Documentation

There are two sample documents in this section of the guide. One is a sample spreadsheet to keep track of the iPads and any information needed to support them. The second document is a checklist used in the Agenda creation and posting.

5.2.1 Sample iPad tracking spreadsheet

Gov Bd Member	Asset #	Serial#	WiFi MAC	iTunes Account	PW	cell account	Notes
Supervisor Bill Williams	45950	Dn7g2fq1dfj2	40:30:44:44:37:86	iTunes1a@valleyair.org	ITAcc0unt51	15593494461	
Councilmember Harry Henderson	45948	Dn7g2fq1dfj3	40:10:44:9A:21:5C	iTunes2a@valleyair.org	ITAcc0unt52	15593494462	
Mayor Dennis James	45938	Dn7g2fq1dfj1	40:33:44:46:AE:6C	iTunes3a@valleyair.org	ITAcc0unt53	15593494463	
Supervisor Robert Ackerson	45920	Dn7fxb19dfj1	40:32:44:99:CE:25	iTunes4a@valleyair.org	ITAcc0unt54	15593494466	
Supervisor Anthony Soprano	45914	DN7G17Z8DFJ1	40:31:44:48:92:C2	iTunes5a@valleyair.org	ITAcc0unt55	15993494435	

The “Notes” section can keep track of things like, date issued, history of who had the iPad (for organizations with rotating members) and gift card(s) assigned to iPad.

5.2.2 Sample Agenda Creation Checklist

This checklist is useful for the reoccurring task of creating and publishing the electronic agenda document. This sample is a good starting point but much of it will have to be modified to fit your organization.

Checklist for Creating the Electronic Governing Board Agenda

Receive the Final Governing Board Packet

- Governing Board Agenda in MS Word format on G: drive.*
- Study Agency Agenda in MS Word format on G: drive (if applicable).*
- All Governing Board packet items scanned in PDF format on G: drive.*
- All Study Agency packet items in PDF format on G: drive (if applicable).*
- Copy all electronic packet documents to your working directory.*

Create the Electronic Final Agenda Packet

- Remove weblinks from MS word Agenda and change font color for linked agenda items.*
- ¹Convert any MS Word documents to .PDF format.*
- Merge Governing Board packet documents into one pdf document titled with the following format: Governing Board Packet [Month] [4-digit Year].pdf*
- Merge Study Agency packet items into one pdf document titled with the following format: Study Agency Packet [Month] [4-digit year].pdf (if applicable)*
- Create all bookmarks for Electronic Agenda Packets; look at previous electronic agendas for format standards.*
- Create all of the page links on the agenda items.*
- Perform an OCR routine through Adobe Acrobat Pro.*

Review the Electronic Final Agenda Packet

- Post document(s) in the Review FTP site (U:\Review) for Clerk of the Board*
- Complete any needed changes and repost to Review FTP site.*
- Clerk of the Board completes review and approves document(s).*

Post The Electronic Final Agenda Packet

- Create G: Drive folder for new packet; G:\GovBd Agenda\[Month#]-[Four Digit Year]([Month]) ex.: 4-2012(April)*
- Copy final documents in the G: Drive for District staff access (G:\GovBd Agenda\[Month#]-[Four Digit Year]([Month]) ex: 4-2012(April)*
- Create FTP site folder for new packet; U:\GovBd\[Month#]-[Four Digit Year]([Month])*
- Copy final documents in the GovBd FTP site for Governing Board Members (U:\GovBd\[Month#]-[Four Digit Year]([Month]))*
- Delete the Governing Board packet from G: Drive that is more than 3 months old.*
- Delete the Governing Board packet from U: Drive (FTP site) that is more than 3 months old.*

Test Download

- Test all links on staff copy of the Electronic Agenda Packet*
- Download Governing Board packet from FTP site from an iPad and test all links.*
- Correct any issues and repost as necessary (following versioning rules).*

Versioning New Packets

*This Section is Only needed If you Need to Re-publish Documents in the Governing Board Member's Download Area.

- Create new (corrected) document. Name the corrected packet by adding "ver #" to the end of the file name, for example a new Governing Board Packet would be named: Governing Board Packet [Month] [4-digit Year] ver [incremental number].pdf. Start with "ver 2" for revised documents and increment the number thereafter. Ex: Governing Board Packet April 2012 ver 2.pdf
- Complete the "Review the Electronic Final Agenda Packet" section of this document for the new Governing Board Packet.
- Post the corrected packet as described in the "Post the Electronic Final Agenda Packet" section of this document.
- Test the packet download as described in the "Test Download" section of this document.
- Delete the previous version (incorrect version) of the Governing Board Packet from the current folder.

Complete Process

- Inform District staff of availability of the new packet on G: Drive.
- Inform Governing Board Members that the new Governing Board Packet is ready to download to their iPads.
- Delete old Agendas from the U:\Review folder.

5.3 Supporting Policies and Procedures

5.3.1 Monthly iPad allowance

Governing Board Tablet PC Policy

PURPOSE

The District is dedicated to reducing its use of material resources and recognizes the benefit of using technology to enhance the business of the District. In recognition of this, the District has adopted a “paperless” agenda process for the conduct of District Governing Board meetings. To facilitate this process, Governing Board members will be provided a tablet computer purchased by the District unless they choose to use their personal equipment or equipment provided by another agency.

POLICY

- A. Governing Board members will be provided a District owned Tablet PC to facilitate the conduct of District business or they may be reimbursed for District business costs associated with the use of their personal Tablet PC or one issued to them by another government.
- B. The District will provide Governing Board members a standard monthly allowance based on the equivalent cost for the District to provide a tablet and cellular service to Governing Board members prorated to 50%, the amount estimated to represent District business use. Allowance amounts will be re-established annually to reflect changes in District costs.
- C. In the event a Governing Board member has been issued a Tablet PC by a city, county or other agency for which they serve, the District will disburse the standard monthly allowance to that entity at the member’s request.
- D. The current standard monthly Tablet PC allowance for Governing Board members is included in Appendix A.

Governing Board members having questions concerning the tax implications of District Tablet PC allowance benefits are urged to contact the Internal Revenue Service or other experts in tax law.

5.3.2 Acceptable Use Policy

San Joaquin Valley Unified Air Pollution Control District Information Services



COMPUTER AND INTERNET ACCEPTABLE USE POLICY ACKNOWLEDGEMENT

The District provides access to computer, phone and Internet resources to help employees do their jobs more efficiently. The Computer and Internet Acceptable Use Policy (CIAUP) is designed to help employees understand District expectations for the use of computer, phone and Internet resources.

First and foremost, computer, phone and Internet resources are District business resources. These resources are to be used primarily for business-related purposes, and in such a way as to comply with copyrights, software licensing rules, property rights, privacy and prerogatives of others. Additionally, all existing District rules & policies are applicable to District computer, phone and Internet use, including but not limited to: intellectual property, privacy, misuse of District resources, sexual harassment, media releases, information and data security, and confidentiality.

Chats, web logs (blogs), newsgroups and email on the Internet give employees an unprecedented reach to propagate District messages. Because of that capability, all employees must take special care to maintain the clarity, consistency and integrity of the District's image and posture. Anything an employee writes in the course of acting for the District on the Internet can be taken as representing the District's position. That is why the District expects employees to forgo a measure of individual freedom when participating in email, chats, or newsgroups.

The District's direct connection to the Internet offers potential benefits, but it can also present significant risks to District hardware, software, and data if appropriate security protocol is not followed. The District's CIAUP attempts to cover all situations. HOWEVER, if employees encounter a situation that requires an activity not covered in the District's CIAUP, that activity should be considered **PROHIBITED** until written permission is requested through IT Services and granted by the Executive Director or designee.

All District employees will be provided with a written copy of the CIAUP and must sign below, acknowledging their receipt of the policy. The District's CIAUP is subject to modifications, over time, to deal with changing computer and Internet issues. It is the employee's responsibility to review the latest CIAUP version for guidance on computer and Internet usage. The latest CIAUP can be found on the District's Intranet site.

"My signature acknowledges that I have received a written copy of the District's Computer and Internet Acceptable Use Policy. I fully understand the terms of this policy and agree to abide by them. I realize that District computer and Internet resources are primarily for District business purposes. I also realize that District security software may record for management use the Internet address of any site that I visit and keep a record of any network activity in which I transmit or receive any kind of file. I acknowledge that any message I send or receive will be recorded and stored in an archive file for management use. I know that any violation of this policy could lead to disciplinary action, up to and including termination, or even criminal prosecution."

PRINT NAME

SIGNATURE

DATE

San Joaquin Valley Unified Air Pollution Control District Computer and Internet Acceptable Use Policy

1. District computer systems and other technical resources, including but not limited to telephones, cell phones, voice mail, e-mail, or video teleconferencing (VTC) systems are provided for District business. If, during the course of your employment, you perform or transmit work on the District's computer system or other technical resources, your work will be subject to search, inspection, and review by appropriate supervisory, administrative and/or management staff. In addition, the District has software and systems in place that can monitor and record all Internet usage. Employees should be aware that District security systems are capable of recording each World Wide Web site visit, each chat, newsgroup or email message, and each file transfer into and out of our internal network. The District reserves the right to record such visits. No employee should have any expectation of privacy as to his or her technical resource usage. District management and technical staff will review computer activity and analyze usage patterns. District technical and management staff may inspect any and all files stored in "private" areas of the network and local computers in order to assure compliance with policy.
2. The District has installed software and hardware to assure the safety and security of the District's networks. No personally-owned computing equipment may be connected to District computing equipment without prior approval from IT Services. Any employee who attempts to disable, modify or circumvent any District security facility will be subject to disciplinary action up to and including termination.
3. Employees may access only files or programs, whether computerized or not, that they have permission to enter. Unauthorized review, duplication, dissemination, installation, removal, damage, or alteration of files, passwords, computer systems, computer programs or data, or other District property, or improper use of information obtained by unauthorized means, may be grounds for disciplinary action, up to and including termination. Employees are reminded that chats and newsgroups are public forums where it is inappropriate to reveal confidential District information, customer data, trade secrets, and any other material covered by existing District security policies and procedures. Employees releasing protected information via web log, newsgroup or chat – whether or not the release is inadvertent – will be subject to the penalties listed in #2.
4. Any employee who obtains a password or ID for District technical resources must keep that password or ID confidential. District policy prohibits the sharing of user ID's or passwords obtained for access to computer and technical resources except in the case of giving the password to a supervisor for backup purposes. Employees shall not allow non-District employees to use District computer equipment, without prior approval of IT Services.
5. Only those employees or officials who are duly authorized to speak to the media, to analysts, or in public gatherings on behalf of the District may speak/write in the name of the District to any web log, newsgroup or chat room. Other employees may participate in web logs, newsgroups or chats, but they do so as individuals speaking only for themselves, and only on their own time. Where an individual participant is identified as an employee or agent of the District, the employee must refrain from any unauthorized political advocacy and must refrain from the unauthorized endorsement or appearance of endorsement by the District of any commercial product or service.
6. District employees must use their District-issued email account for all emails sent or received on District computer equipment. No Internet-based email or instant messenger accounts are to be used (including but not limited to: Hotmail, Yahoo, AOL, etc.).
7. The display of any kind of sexually explicit image or document on any District system is a violation of District policy on sexual harassment. In addition, sexually explicit material may not be archived, stored, distributed, edited or recorded using District computer or technical resources.
8. The District uses third-party software and data to identify inappropriate or sexually explicit Internet sites. We may block access from within our networks to all such sites that we know of. If you find yourself connected incidentally to a site that contains sexually explicit or offensive material, you must disconnect from that site immediately, regardless of whether that site had been previously deemed acceptable by any screening or rating program.
9. The District's Internet facilities and computing resources must not be used knowingly to violate the laws and regulations of the United States or any other nation, or the laws and regulations of any state, city, province or other local jurisdiction in any way. Use of any District resources for illegal activity is grounds for immediate termination and

possible criminal prosecution. The District will cooperate fully with any legitimate law enforcement investigation or subsequent action.

10. Any software or files downloaded via the Internet into the District's network become the property of the District. Any such files or software may be used only in ways that are consistent with their licenses or copyrights. Any file that is downloaded must be scanned for viruses before it is run or accessed.
11. No employee may use District computer or technical resources to download or distribute pirated software or data.
12. No employee may use the District's Internet facilities knowingly to disable or overload any computer system or network, or to circumvent any system intended to protect the privacy or security of another user. No employee may use the District's Internet facilities to deliberately propagate any virus, worm, Trojan horse, or trap-door program code.
13. Each employee using District Internet facilities shall identify himself or herself honestly, accurately and completely (including one's company affiliation and function where requested) when participating in chats or newsgroups, or when setting up accounts on outside computer systems.
14. The District retains the copyright to any material posted to any forum, newsgroup, chat or World Wide Web page by any District employee in the course of his or her duties.
15. Use of District Internet access facilities to commit infractions such as misuse of company assets or resources, sexual harassment, unauthorized public speaking and misappropriation or theft of intellectual property are also prohibited by this CIAUP.
16. Employees should schedule communications-intensive operations such as large file transfers, video or audio downloads, mass emailings and the like for off-peak times, and coordinate them with IT Services. Off-peak time is before 9:00 AM and after 4:00 PM.
17. Computers that use their own modems or wireless network hardware to create independent data connections sidestep District network security mechanisms. Any dial-up or dedicated communication connection that does not utilize the District's communication servers or network equipment must be approved and installed by IT Services.
18. Employees may use District Internet resources for non work-related uses during established break and lunch times within assigned work hours. No personal use allowed outside of these hours. Non work-related use is still subject to all other District rules and policies related to District computer and Internet use, including but not limited to: intellectual property, privacy, misuse of District resources, sexual harassment, media releases, information and data security, and confidentiality.
19. District-issued laptops are subject to all conditions listed in this CIAUP. They are not to be used outside of assigned District work hours and they are not to be used in non work-related locations (i.e., at home) without prior authorization from a supervisor/manager.
20. The District's CIAUP attempts to cover all situations. HOWEVER, if employees encounter a situation that requires an activity not covered in the District's CIAUP, that activity should be considered **PROHIBITED** until written permission is requested through IT Services and granted by the Executive Director or designee. The District's CIAUP is subject to modifications, over time, to deal with changing computer and Internet issues. It is the employee's responsibility to review the latest CIAUP version for guidance on computer and Internet usage. The latest CIAUP version can be found on the District's Intranet site.

6.0 Appendix #5 Vendors and Contacts

<http://www.valleyair.org/symposiums/pac/main.htm>

Adobe Acrobat Pro website (Agenda Creation Software):

<http://success.adobe.com/en/na/sem/products/acrobat/acrobat.html>

Apple Business Sales Contact (iPads and other hardware):

Fresno Apple Store at Fashion Fair

Kevin Deisher

Business Manager

667 E. Shaw Ave, Suite #E-07

Fresno, CA 93710

T 559-244-3403

F 559-244-3404

fashionfairbusiness@apple.com

Drive Headquarters (FTP site service):

<http://drivehq.com>

Phone: 1-800-836-0199

Readdle (PDF Expert) (iPad application for downloading/reading/annotating documents):

http://readdle.com/products/pdfexpert_ipad/

info@readdle.com

Air District IT Support Contact List

Alex Aftanas

Supervising Network Systems Analyst

Tel: 559-230-6045

Cell: 408-219-3090

Email: Alex.Aftanas@valleyair.org

Ken Pretzer

Director of Information Technology Services

Tel: 559-230-6040

Cell: 559-760-8501

Email: Ken.Pretzer@valleyair.org

Michelle Franco

Clerk to the Board

Tel: 559-230-6038

Email: Michelle.Franco@valleyair.org

General Air District Phone (Operator):

Tel: 559-230-6000

San Joaquin Valley Air Pollution Control District

1990 E. Gettysburg Ave.

Fresno, CA 93726