Committee documents are stored using a combination of document sets and folders that have been pre-configured for committee use. This guide will give instructions on how to create new document sets and folders as required.

**Creating Document Sets**

All document sets are stored within a library called Agenda & Minutes and are sorted into views called Agenda & Minutes (current year) and Agenda & Minutes (past years).

1. From the Overview page, click on the link Agenda & Minutes (current year)

2. Click the Files tab in the upper left corner

3. Click the arrow under New Document at the far left of the ribbon, then select Committee Meeting Document Set.
You may find that there are other types of document or document sets listed here but this type is the one used for committee documents.

4. In the form that appears, enter the information into the fields. Type the information or use the tags or calendar icon at the end of some fields to select from the options provided. For the document set to appear in the correct location, ensure you enter a year into the Year field.

5. Click Ok

The document set has now been created and will be pre-populated with the folders you need.
6. To locate your document set again, click on Agenda & Minutes (current year) and your document should display here:

Click on the name of the document set to open it and you should see the screen from step 5.

**Extra Tips:**

1. Each January, document sets from the previous year will now move to the Agenda & Minutes (past year) link. If you can’t find an old document set, it will probably be located here.
2. If you create a document set and do not fill in the Year field, the document set will not appear in the Agenda & Minutes (current year) link, nor the Agenda & Minutes (past years). To find it:
   a. Click on All Documents in the Agenda & Minutes (current year) link
   b. Click on the document set that is not appearing in the Agenda & Minutes (current year) link. This will show the same screen from step 5 above.
   c. Check if there is a Year listed. If not, click Edit Properties
   d. Enter the year into the Year field in the form. The document set will now appear in Agenda & Minutes (current year) or Agenda & Minutes (past year).