

Online Documents and Policy Storage Overview and Managing Document Types

Storing Online Documents is a feature of both BoardBook Premier, and BoardBook Manuals. This feature allows you to make documents easily available to your users, and or public

In this specific document we will cover the following subjects:

- General overview of the structure of online documents
- The Different Document Types
- Adding or Managing Document Types

NOTE: To manage your Documents a user must have the 'Document Manager' permission.

General Overview of the Structure

The way I like to describe the structure for online documents is by comparing it to a filing cabinet, with its drawers and folders.

- Overall: Think of a filing cabinet. For users with BoardBook Premier, this filing cabinet has five drawers. For our Manuals customers the cabinet has a single drawer.
- Document Types: These are the cabinet drawers. BoardBook Premier customers by default start with two drawers named 'Documents', and 'Policies'. These drawers can be reconfigured or, up to three new drawers added. The 'Style', and 'For Users' settings can be set or updated as needed. For Manuals customers the single drawer is named 'Policies' by default. Within these drawers we can add folders.
- Folders: Except for the [No Folder], we are free to add or update the folders we want. The [No Folder] is a system folder and is used as a safety net. If you were to delete a folder containing files, those files would be automatically preserved in the [No Folder]. The [No Folder] can be removed or renamed if needed. Contact us for help with this.
- Files: Files are added or updated within folders.

Throughout this document we will refer to document types as document types. The other documents in this series will typically use the term file cabinet drawer.

A note for Manuals users.

The rest of this document discusses features not available in your version of BoardBook. Unless you are interested in what additional features are available for online document management in the full BoardBook Premier product there is no need for you to continue with this document.

The Different Document Types

On the 'Manage Document Types' screen we can see the current document types on our account. We can navigate to this screen by clicking either 'Documents', or 'Policies' in the Gray Menu Bar then selecting 'Manage Document Types'. On this screen we will see our two categories of Document Types. One category, called System Document Types are managed at the meeting level. The other category, 'Custom Document Types' are what this handout will discuss. As previously mentioned, a BoardBook Premier account will initially start with two 'document types' titled 'Documents' and 'Policies'. These are both 'Custom Document Types' and are managed on this screen. Here is generally what this screen will look like:

| Document Type(s) | View and Manage Documents | Document Permissions |
|---|--|----------------------|
| Custom Agendas Custom Agendas | View Documents | |
| Custom Minutes Custom Minutes | View Documents | |
| Custom Public Notices Custom Public Notices | View Documents | |
| Documents Stores (Archived, Saved, Cached, etc.), for Staff | View Documents Manage Documents Download Documents | Permissions |
| Extras Supplemental Resources | View Documents | |
| Meeting Attachments Meeting Attachments | View Documents | |
| Policies Books (Policies, Handbooks, etc.), for Board | View Documents Manage Documents Download Documents | Permissions |

Note that the specific order and names may be different for your account.

Note that the 'Download Documents' option only appears if there are documents in the document type.

Custom Agendas, Custom Minutes, Custom Public Notices, Meeting Attachments, and Supplemental Resources or Extras, are system document types.

Documents and Policies are configured by default on new accounts and are 'custom document types'. These are included in your total of five custom document types.

As you can see, custom document types have options to view manage or download as well as to delete the document type or view/edit permissions to the document type. These are not present on system document types.

Adding or Managing Custom Document Types

Both Adding a new custom document type and reviewing and updating an existing custom document type have essentially the same options. These will be discussed below:

Use the blue 'Add New Document Type' to add additional custom document Types

To review the settings for or make changes to an existing 'Custom Document Type' click on the name of the document type, for example to customize the default 'Documents' document type we would click on 'Documents'.

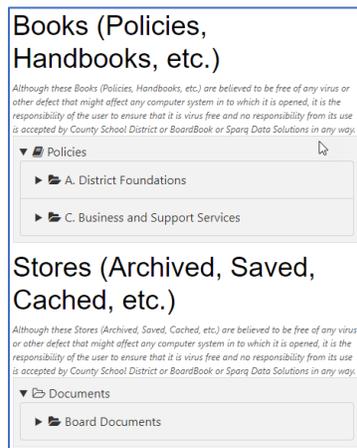
The information you'll be able to add, or update is as follows:

Title: This is the name of the document type, think of it as the name of the file cabinet drawer.

Default Permission Level: This is a drop down of available permission levels. The default permission level is the permission level automatically assigned any time a new document is added to this specific document type. If you already have documents in the document type, changing this will not alter the existing documents.

Style: This drop down identifies how documents will be viewed particularly on the public page. Your choices are Books or Stores. Screenshot examples show the difference on the public page:

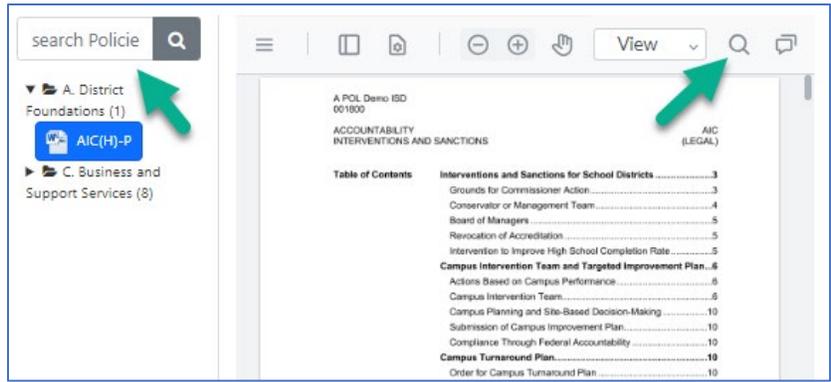
In the screenshot below we see 'Books (Policies Handbooks, etc.)' and 'Stores (Archived, Saved, Cached, etc.)'. Initially other than being categorized, there is little difference:



However, once we click on a folder and open a document in each there is quite a difference.

Here is a 'Books' type:

Note that the folders display in a sidebar below a search window allowing all documents to be searched while the opened document is seen on the right with its individual search option.

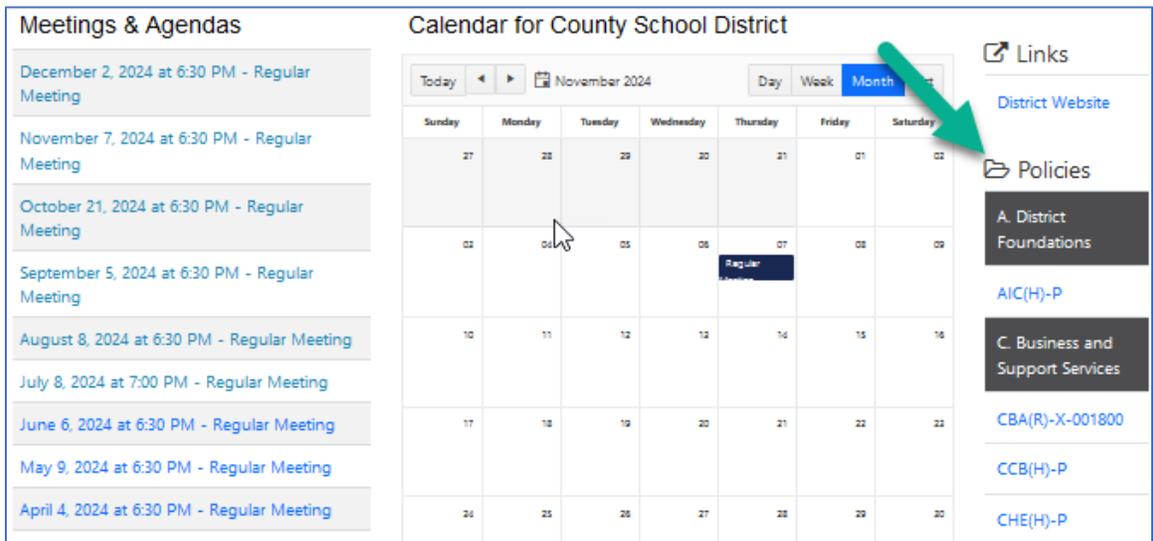


Here's the 'Stores' type:

Note that only the file we selected is available and we only have the option to search within this specific document.



For Users: This drop down can add convenience links to the documents in this document type to the home page of certain portions of your users. Your choices are None, Board Members, or Staff Members. On my training account I have the document type 'Policies' set to 'Board Members' the screenshot of a Board Member's home page below shows how this might look:



One additional option is available only when viewing / editing options on an existing document type. This gives you the option of making bulk permission changes across all folders within a file cabinet drawer. Note By

far the recommended method is to go into a file cabinet drawer and update permissions to files within a folder. This safer method is explained in the Managing Files and Folders handout.

To change the permission level for existing Documents, [click here](#) .

Caution: There is no undo when using this tool. We strongly recommend that if you feel use of this tool is appropriate, call tech support and discuss this with us.