

Settings – Change Your Motion Results

When your organization's BoardBook was configured, a default preference for motion results terminology was made. We call these 'action result options'. For example, by default most accounts will use 'Passed' to signal successful motion, and 'Failed' to signal a non-successful motion. This information shows up on the public projector if it is being used as well as any users following in the program during the meeting. It also appears on your minutes report. If your organization would like to use different words this is something that can be changed in settings.

This document will describe both what changes can be made as well as give instructions on how you can request that we make any changes for you as well as how you can make those changes.

In this document we will cover the following subjects:

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What options are available

As we previously mentioned, when your account was created, we applied default choices. This means that for most customers their options are as follows:

A successful motion	Passed
An unsuccessful motion	Failed
A motion which was removed	Withdrawn
A motion which was tabled	Tabled
A motion not receiving a second	Unseconded

These can be replaced with whatever terms your organization prefers.

How you can make the changes

Note: **Changing system settings incorrectly can cause issues which may be very difficult to recover from. Many of the settings are NOT intuitive. Please only change or update settings as specifically described in these instructions.** Please remember that you always have the option to ask us to make the changes for you.

The user permission Settings Manager is required to make any changes in settings. To check for this permission, look at options in the gray menu bar, if you have settings listed you have this permission.

In the gray menu bar select 'Settings' and then 'Action Options'

In this section scroll down to the section labeled 'Action Result Text Overrides' see the screenshot below:

Action Result Text Overrides

You can optionally Override the Action Result text options here, which will impact the Minutes, the In Meeting Actions, and everywhere else this is shown.

You can choose to Override some options without Overriding them all.

Passed
Carried

Failed
Failed

Withdrawn
Withdrawn

Tabled
Tabled

Unrecorded
Unrecorded

Replace the current text in the appropriate text fields and use the blue 'Save Applications Settings' button.

How to request a change

Now that you're familiar with the options available, here's the information we would need to make these changes for you. We need the request to come from a user with either the Organizational Administrator or Settings Manager permissions, or the head of the organization such as the Superintendent, CEO or City Manager. Then we will simply need to know what you want to call a successful motion, an unsuccessful motion, a motion which has been withdrawn, tabled, or unseconded.