

Customize User Names or Titles

During, or after setup a user's job title, nickname, or other customizations can be made. In this document we will discuss what can be done and where that information will be visible.

Adding or customizing user information will require the Organizational Administrator' role. To quickly determine whether you have the organizational administrator role follow these steps:

In the Gray Menu Bar click on Users & Committees (may be displayed as Users & Units).

Click on 'Manage All Users', if this is not seen you do not have this role.

This will show a list of all users with information about the users appearing in columns. If the columns 'Last Updated' and 'Last Activity' are seen, you have the 'Organizational Administrator' role.

NOTE: With the exception of the Attendance record, and the Action information on the Minutes Report, this document is not relevant to names or any other information on downloaded reports such as the Agenda Report, Public Notice, or different parts of the Minutes Report. That information is controlled by the report template. To learn more about report templates please see the 'Working with Report Templates' handout on our support page.

In this document we will cover the following subjects:

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What can be customized:

As with many issues, having sufficient and accurate information is the key to quickly solving login issues. The two most important pieces of information to start with are:

Other Position Title 'Organization Name'	Often used for job title
Display Value	Miscellaneous
Prefix	Name prefix / honorific such as Dr.
Suffix	Name suffix such as Jr. or II
Nickname	Nickname

Where does the information appear:

Various parts of the information will appear in different places in the program.

Note that for this example a board member was used as this information shows up in many more places for board members than for other users. For non-board members only the 'user lists', Email Your Users, and upper left corner of the screen are relevant.

In the user lists

We can view this by clicking on Users & Committees (may be displayed as Users & Units) in the Gray Menu Bar and then selecting Manage all Users, to see all users or Board Member Users or Staff Users to see a limited list of users. Note, for users without the Organizational Administrator or User Manager rights the Manage all Users option will not appear.

In the screenshot below the second entry shows the Prefix, Nickname, Suffix, Display Value, and Other Position Title are displayed and we can see the order they appear. Note that 'Nickname' replaces the user's first name which is 'Board'.

Prefix Nickname Member1 Suffix (Display Value) Other Position Title

On the 'Email your Users' and 'Previously Sent Emails' screens:

Prefix Nickname Member1 Suffix (Display Value)

In a 'Voting Report', note these are only available to users with the Minutes Manager permission:

Prefix Nickname Member1 Suffix

Meeting

June 5, 2025 at 6:30 PM - Regular Meeting

In the Attendance and Take Action Minutes Manager Tools as well as the results of these tools in the Minutes Report:

Attendance Taken at 11:34 AM.

Prefix Nickname Member1 Suffix (Display Value): Present

Voting Detail:

Prefix Nickname Member1 Suffix (Display Value):

In the upper left corner of the screen when that user is logged into BoardBook:

 Prefix Nickname Member1 Suffix

How to make the changes:

Making these changes will require the 'Organizational Administrator' role. To quickly determine whether you have the organizational administrator role follow these steps:

In the Gray Menu Bar click on Users & Committees (may be displayed as Users & Units).

Click on 'Manage All Users', if this is not seen you do not have this role.

This will show a list of all users with information about the users appearing in columns. If the columns 'Last Updated' and 'Last Activity' are seen, you have the 'Organizational Administrator' role.

To make these changes:

In the Gray Menu Bar click on Users & Committees (may be displayed as Users & Units).

Click on 'Manage All Users'

Click on the 'Edit' link next to the name of the user you wish to update.

In the left column, click on the 'View/Edit User's Information' link

In the 'User's Information' column you will find fields for the following:

Nickname

Prefix

Suffix

In the right-hand column, you will find fields for the following:

Other Position Title

Display Value