

Automatic Notification Emails

After publishing meetings, many of our organizations send notification emails. These are most often sent to the board members but may include other individuals or groups. In BoardBook there are settings that allow these notification emails to be sent automatically. This document may refer to videos or handouts on related subjects. These can be found on our support page. The support page can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Administration and Meeting Management Help'.

This document will describe some options related to automatic notification emails in settings as well as give instructions on how you can make these changes, or request that we make any changes for you.

Making changes to any of the settings discussed below will require the 'Settings Manager' permission. You can quickly identify whether you have this permission by checking the gray menu bar. If you see the Settings option, you have this permission, if you see User Preferences, you do not.

In this document we will cover the following subjects:

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The Notification Email

The notification email is intended as a way to send an email about a specific meeting to your users. This is typically sent once the meeting materials have been made available to at least the board members and serves to let your users know the meeting is ready for them to look at. A link to the 'View Meeting Details' page for the meeting will automatically be attached. Note that if the email is being sent to any 'email only contacts' the meeting link will be to the public page.

The capability described in this document can be used to automatically send Meeting Notifications, these are the same notifications you can send from the 'Emails' column of the 'Meetings, Minutes, and Agendas' screen. You will not have the same ability to pick and choose individuals to receive these emails, nor can you choose to attach or link anything additional to the email. This mail will only be sent once per meeting.

More information about the notification email itself can be found on our support page.

What options are available

You have the option to send or not send a notification email automatically (not sending is the default when new accounts are set up)

If you choose to send an automatic notification email, you can specify that the email be sent either when the meeting is published, or when the agenda is locked. Note that by default when accounts are set up the agenda is locked when the meeting is published.

You have the option to identify what group or groups of users are to receive the notification email. Note that the options here are limited. If you need more robust options, you will need to send your notification emails manually.

Any or all the groups identified below can be selected to receive the notification email:

- Board Members
- Staff
- Public

When initially set up, users are typically categorized as either board members or staff. While unusual, users can be categorized as Public. This is also something that can happen accidentally if a user is miscategorized during setup.

Follow the steps below to identify what categories your users fall into:

In the gray menu bar click on 'Users & Committees' (note this may have a different but similar name), then choose 'Email Your Users'.

On the Email Your Users' screen, on the left side you will see a list of all your users as well as any email-only contacts you may have. Just below 'Your Users' click on the blue link 'Remove All Your Users from this Email'.

At this point, none of the users or contacts names will have check marks.

In the column on the right you can click on buttons labeled Board Members, Staff, or Public in turn to identify which users fall under each category by seeing which users have been checked. Be sure to choose the 'Remove All Your Users from this Email' between selections.

Making the change

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.

In the gray menu bar select Settings then Public Page Options

This will place you in the Public Page Options section.

In this section select your choices for the following:

Send automatic Meeting Notifications when:

No Emails	This disables the automatically send function
Meeting is Published	This sends the notification email the first time the meeting is published. If the meeting is moved out of published and then back, no email is sent.
Agenda is Locked	This sends the notification email the first time the agenda is locked. If the meeting is unlocked and relocked, no email is sent. Note that unless the agenda/meeting lock settings have been changed for your account, publishing a meeting will lock the agenda.

Reply to Email Address for Automatic Notifications:

Note that this is a required field.

If a recipient replies, what email address do you want that reply to be sent to? Enter a valid email address.

Who is included by default on the Meeting Notification Emails?

Board Members	This includes only the users in the Board Member category <u>as well as any email only contacts</u> identified on the 'Email Your Users' screen.
Staff	This includes only the users in the Staff category
Public	This includes only the users in the Public category

The 'What options are available' section has instructions for identifying which of your users would fall in each of these categories.

Requesting a change

Instead of making the change yourself, you can contact our support team and ask us to make the change for you. Below is the information we will need:

Before requesting any change, please ensure you fully understand both the capability described and the options which are available.

Overall, what do you want to change? Please refer to the subject of this handout.

Provide your choices for each of the questions below:

Send automatic Meeting Notifications When: (pick one)

- No Emails
- Meeting is Published
- Agenda is locked

Note, if 'No Emails' was selected, no further information is needed.

Reply to Email Address for Automatic Notifications

Provide the email address

Who is included by default on the Meeting Notification Emails? (pick at least one)

- Board Members
- Staff
- Public