BoardBook®

Understanding User Permissions in BoardBook Premier

In this document we will go over user permissions in the BoardBook Premier program. This document contains references to other documents and videos located on our support page. As always access the support page by clicking on the blue circle with the question mark (found at the top of the BoardBook page) and selecting 'BoardBook Help'.

Overview

In BoardBook, as with most programs there are settings which control what a user can do and see within the program. Over the course of this document, we will talk about the user role and user permissions which define the capabilities of a user.

User Position: When setting up a new user configuring the user role does two things.
> First, it identifies what section of the manage users page the user will be assigned to (Typically Board or Staff).
> Second, some user positions also automatically assign a User Role. This will be covered below.

User Permissions: User permissions provide a user with specific capabilities or access within the program. Some users may need no permissions, as simply having a login provides the 'Anyone with a Login' level of access, other users may need one, two or many permissions to do, or access what they need in the program.

Note: In BoardBook Premier as with most other permission-oriented programs we recommend only giving a user the bare minimum permissions that they need to do what they need in the program. Giving a user more permissions than they need or have been trained to use can result in unrecoverable actions being taken out of ignorance or even malice.

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User Position:

Note: The 'User Position' can only be managed by a user with both the 'Organizational Administrator' role.

The user position often seen in the program as 'Position with 'Organization Name' should be set when a new user is added but can be updated later. **It is important to understand that the user position has nothing to do with the user's job title**. For example, a person working for the organization in an administrative function might be called an administrator, or even have administrator in their job title or responsibilities. This however has nothing to do with what their user position is within the BoardBook program. In the BoardBook program, a user with the 'Administrator' user position is someone who administrates the program and can make such important changes as adding or managing meeting locations, literally changing the organization name on the account, adding and removing users, and will have access to ALL documents and attachments.

If you want to include a person's job title, or description there is a field for this. This field is titled 'Other Position Title' and it is optional. This field allows us to properly classify a user by applying both a 'Position with 'org name', and a 'Other Position Title'. So, for example if I had someone in my organization who was the Administrative Assistant to the CFO who needed access but not administrative access to the program, I would generally set their position as shown below:

Position with County School District:

Staff

Other Position Title (optional):

Administrative Assistant to CFO

As we'll see shortly, the 'Staff' position does not automatically apply any user role, so I'll be able to apply any specific permissions needed by this individual user or not as appropriate.

User Role: As we have learned the User Role can be automatically or manually assigned. Within BoardBook Premier the only relevant roles are:

Organization Administrator   Can manage organization settings such as Name and Media settings can add new users and manage user settings such as email addresses for existing users. A user with this role can view ALL documents as well as ALL attachments for any meeting to which the user has access. Be very careful who has this role.

Can Log into BoardBook Premier   By unchecking this role a user can be prevented from logging into your organizations BoardBook Premier account. This is generally done when this would likely be a temporary situation. Users who are not expected or wanted to ever log into the organizations BoardBook account again should be removed.

Breakdown of User Permissions:

Permission	Task Description
Agenda Manager	Create edit and manage meetings, edit and manage agendas, change meeting status. Users with this user permission, or the permission within a committee, are the only users who can create, edit, or alter a meeting or agenda.
Minutes Manager	Has access to the Minutes Manager tools, Take Action, Attendance, and the Discussion field.
Meeting Leader	Control the agenda navigation for persons using 'Follow the Leader' and the 'Projector Page' if used. Manage 'Raise Hand' if that function is being used.
Agenda Reviewer: In Development	View meetings and agenda information when the meeting is in the 'In Development', 'Published', or 'Completed' statuses. Note: Can view only, cannot make changes.
Agenda Reviewer: In Review	View meetings and agenda information when the meeting is in the 'In Review', 'Published', or 'Completed' statuses. Note: Can view only, cannot make changes.
Voting Member	This is your typical 'Board Member'. Can view meetings in 'In Review', 'Published', or 'Completed' statuses. Can use electronic voting.
Agenda Item Requestor	Can create a standalone item which can be submitted to be added to a meeting by an Agenda Manager.
Requested Agenda Item Approver	Can review, then approve or return requested items
Attorney	No rights by itself but other permissions, such as Agenda Reviewer, can be applied.
Document Manager	Can manage document types and upload and manage documents. NOTE: Does not apply to attachments which are managed by the Agenda Manager.
Links Manager	Can create, edit, and delete organizational links. NOTE: Does not apply to links within an agenda which are managed by the Agenda Manager, nor does this apply to the meeting links added to calendar by the meeting creation / status change process.
Goal Manager	Can create, edit, and delete organizational goals.
Calendar Manager	Can create, edit, and delete non-system generated calendar events. NOTE: Meetings automatically generate, and display calendar entries based on the meeting's status and the user's permissions.
User Manager	Can delete users and assign or change permissions to any user. Add update or manage 'Units' (committees, commissions, etc.) When combined with the 'Organization Administrator' role, can add new users and manage user settings such as email addresses, user IDs, and passwords for existing users.

User permissions tied to document or attachment access

Whether working with attachments or online documents files added into BoardBook have file permissions applied which can limit both whether the public has access to the file, as well as identifying which users have access. This is done by applying a permission to the file. This permission is initially set when the file is uploaded and can be changed by a user with the appropriate permissions (Agenda Manager for attachments, and Document Manager for online documents. These permissions are also used for program, feature, and tool access and therefor appear both in the previous section, Breakdown of User Permissions, and this section explaining the access hierarchy.

These permissions for a hierarchical listing with the permissions lower in the list having less access than the once shown higher in the list below.

Document Permission	Document access
Organizational Administrator Role	Viewable only to users with this role. A user with this role can view ALL documents as well as ALL attachments for any meeting to which the user has access. Be very careful who has this role.
Agenda Manager	Viewable only to users with the Agenda Manager permission or the Organizational Administrator role
Voting Member (and above)	Viewable to users with this permission, or permissions listed higher in this list
Agenda Reviewers (and above)	Viewable to users either of the 'Agenda Reviewer' permissions, or permissions listed higher in this list
Attorney	Viewable to users with this permission, or permissions listed higher in this list
Anyone with a Login	Not a user permission. Viewable by any user. Not available to the public.
Public / Anyone / Everyone	Not a permission. Viewable by any user and available on the public page is one is being used. Note that for attachments to be viewable by the public the meeting must be available on the public page.

Typical Permissions by Task:

Now let us look at some typical types of BoardBook users and what type of permissions they might need. Obviously, these are just examples, as you add users think about the tasks those users will be performing in BoardBook and assign permissions based on those tasks.

Title	Typical BoardBook Permissions Might Include
Superintendent/CEO	Possibly only Agenda Reviewer – In Review, and Agenda Reviewer – In Development (If actively working with agendas) Agenda Manager, (If leading the navigation during the meeting) Meeting Leader
Administrative Assistant	Agenda Manager, possibly Minutes Manager, (If main program user) Document Manager, Link Manager, Goal Manager, Calendar Manager, User Manager
Other Administrative Staff	(possibly) Agenda Item Requestor
Board President	Voting Member, (possibly) Agenda Reviewer: In Development
Board Secretary	Minutes Manager, If also a Board Member, Voting Member
Board Member	Voting Member
Attorney	Agenda Reviewer: In Review, Attorney

Unnecessary User Permissions

We have noticed that there are several patterns of permissions we commonly see that are unnecessary.

Voting Member — Voting members absolutely do not need Agenda Reviewer – In Review. As the Voting Member permission already gives them access to see meetings in the 'In Review' status. Giving a Voting Member the Agenda Reviewer – In Development may make sense if you want them to see the meeting at the In Development status.

Agenda Manager — There is no need for an Agenda Manager to ever have either of the Agenda Reviewer permissions, or the Item Requester, or Requested Agenda Item Reviewer permissions.

Document Manager — There is no need to give a Document Manager any of the 'Document Type Permissions' seen in the right column on the permission screen. These are used to give non-document managers permissions to manage one or more but not all specific document types.

Document Type Permissions: — These are seen in the right-hand column on the user permission screen. This is used to explicitly give 'management' permissions to one or more specific document types without giving the overreaching Document Manager permission. This is NOT used to give a user access to view documents.

Calendar Manager — There is no need to give a Calendar Manager any of the 'Calendar Permissions' seen on the right column on the permissions screen. These are used to give non-calendar managers permissions to manage one or more but not all specific calendar types.

Calendar Permissions: — These are seen in the right-hand column on the user permission screen. This is used to explicitly give 'management' permissions to one or more specific calendar types without giving the overreaching Calendar Manager permission. This is NOT used to give a user access to view calendars.