

User Management Best Practices in BoardBook Premier

In this document we will go over general best practices involving user management 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'.

Fundamentals

Each user needs their own account. Users should not share accounts, nor should accounts be recycled. Once a user is gone, or will no longer be using BoardBook their account should be removed.

Permissions should be assigned on a basis of need only. It doesn't matter if John Smith is a Senior Manager or Principal, if John doesn't need to be creating or updating meetings and agendas John doesn't have any need for the 'Agenda Manager' permission. Permissions are not a prerogative of rank or title.

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.

General Recommendations

Administrators: Organizations should typically have no more than two or three users with the 'Administrator' position. This is not a title. See 'Understanding User Permissions' for more information.

Yearly Audit: A user familiar with both BoardBook and your organization should review all users and their permissions at least once a year, users who's access needs have changed should have their permissions updated, or be removed from the program.

For More Information

On our support page accessed by clicking on the blue circle with the question mark (found at the top of the BoardBook page) and selecting 'BoardBook Help', you will have access to the following documents which should be helpful:

Understanding User Permissions

Managing Users

Add a New User

Resetting a User's Password