


Did you know you can do that in BoardBook

Whether during trainings, at conferences or responding to support requests, we often are asked if something can be done in BoardBook. We often answer yes, provide additional information and move on. This document is intended to provide answers to these questions. This document contains references to documents and videos located on our support page. Our support page can be reached by clicking the blue circle question mark  then choose 'BoardBook Administration and Meeting Management Help'

In this document the information will basically be broken down into very general categories as follows:
Some questions and answers may appear in multiple sections.

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Meetings and Meeting Information:

Can I have a Zoom or other virtual, streaming, or recorded link for my meeting?

Yes, on our support page the document Managing Links in BoardBook Premier has details.

Can I duplicate a meeting I need to cancel?

Yes, in BoardBook this is called postponing a meeting which cancels the meeting and creates a duplicate. On our support page the document and video titled Postponing a Meeting cover how to do this. If you do not have the reschedule date for the meeting, you can still cancel the meeting and later import the agenda items as needed into a new meeting. Our Import Agenda Items video has more details.

Can I add files or links to a meeting rather than associating them to a specific agenda item?

Certainly, these would be added as Extras, sometimes called Supplemental Materials. See our video on Adding Extras of Supplemental Resources on our support page.

How can I save a local archive of my meeting information?

We've got you covered as this is something we recommend doing. You can download what we call the packet, or agenda and attachments. Note that this can only include attachments which are allowed to be downloaded. For more information see either the Downloading a PDF Packet handout or video on our support page.

Can use BoardBook for my committee meetings?

Yes, you can set up committees and assign users as members of committees. Your committees even have their own agenda managers, minutes managers, voting members, and meeting leaders. Learn more in the Working with Committees document on the support page.

Can BoardBook be used to help us keep track of goals for the board? How about for committees?

Yes, on both counts. In BoardBook you can set up categories of goals such as Board or Committee and identify the goal and provide waypoints or other information. Individual agenda items can then be tagged with a goal both providing a progress update and allowing for goal reports to be run. At the bottom of our support page in the Advanced Features section we have both a document and a video about working with goals.

Agendas and Agenda Items:

Can I have a link in an agenda item?

Yes, on our support page the document [Managing Links in BoardBook Premier](#) has details.

Can I add attachments or other document from my Google Drive?

Yes, while there are limitations regarding adding files created within the Google Workspace tools, a Google utility added to your computer will allow BoardBook to see and add files from your Google Drive. On our support page see the [Using BoardBook with Google Drive and Google Workspace](#) handout.

Can I create an agenda item and add it to a meeting later?

Yes, on the Meetings Minutes, and Agendas screen, just below the Create New Meeting button is a row of links starting with [Create Saved Agenda Item](#) which lets you do this.

Can someone who is not an agenda manager help with the agenda?

Yes, while users with the agenda manager permission are the only users who can create the meeting and agenda, other users with less access can help by creating and submitting agenda items. These submitted items can even be reviewed either by the agenda manager or by other specified users. Find out more in the document [Agenda Item Requester Process](#) available on our support page.

During and after the Meeting:

Can my board use something other than Yea, Nay, or Abstain during a vote?

Certainly, check the Settings section of our support page for a document titled Change your vote options.

Can my action / motion results be something other than Passed, Failed?

Yes, in the Settings section on our support page look for a document titled Change your motion options.

Can my board members vote on devices such as laptops, tablets or smart phones?

Yes, At the bottom of our support page in the Advanced Features section we have several documents covering electronic voting.

Can the program make my board members follow along during the meeting?

Well, no, we can't make them follow but if someone is leading the navigation of the meeting they can choose to follow. Learn more in the Use of View and Follow during a Meeting video on our board member support page which can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Board Member and other Viewer Help'.

Can we make it easier for the public to follow the meeting?

Yes, learn more about how with the help of a person leading the meeting navigation a projected screen or large TV can help your public follow along and feel more like part of the meeting. See the Public Projector Screen video on the support page.

How can my approved minutes be made available?

See the video, or handout located in the After the Meeting section of our support page.

Non-meeting Related:

Can I store my policies and other documents in BoardBook?

Yes, BoardBook Premier users have access to Online Documents and Policy Storage. At the bottom of our support page in the Advanced Features section we have several documents covering this feature.

Who manages my users in BoardBook?

Well, you do, or rather someone at your organization does. One or more users at your organization will have the Organizational Administrator role. Among other things this allows them to set up and manage users. On our support page in the Working with Users section we have several documents about users, user permissions and how to add and manage your users.

What if one of my users can't login?

Our support page has a document titled 'Help your users with login issues'.

I noticed my users are all listed as staff or board member or administrator. Can't they be listed with their job titles?

Yes, in the Working with Users section have a look at the 'Customizing user information such as job titles' document.

Searching on your public page?

The ability for the public to search on the public page is a setting. If enabled, your public page will have the same blue circle with a magnifying glass which is available when you login. If search is not enabled on your public page and you would like it to be please contact support.

BoardBook Customization:

Can I place links on my home page?

Yes, on our support page the document Managing Links in BoardBook Premier has details.

Can I change the schedule for sending out subscriber emails?

In the Settings section of our support page find the document 'Change the schedule for sending out subscriber emails'. It will have the answer.

Can I get hide or rename the [No Folder] in online documents?

Yes, on our support page the document Modify the No Folder in Online Documents has the details.

Can I rename or add new fields to my agenda items?

Yes, on our support page in the Settings section have a look at the document titled Add or change agenda item fields.

Can I change when my meetings lock?

Certainly, find the document Control when your meetings lock, in the Settings section of the support page.