BoardBook®

BoardBook Premier – Manage Users

In BoardBook® Premier, managing users is done by someone with the 'User Manager' permission. Managing users involves a fairly short list of tasks:

This document will go over each of these tasks. Please note that some of the specific user permissions and other options may not be available for all accounts.

Overview, Navigation, and Screens:

In the grey menu bar, use the 'Users & Units' drop down to select 'Manage All Users'. This will take you to a 'List of Users' screen. Just under the blue 'List of Your Users' bar you will see several options. Think of these different options as ways of displaying different screens. Left to Right will see:

Users (Board, Staff, etc.):   A list of users on the account. 'User Managers' have the ability to add, edit or delete users.

Units (Committees, Cabinets, etc.):   A list of units (committees, cabinets, etc.) which have or can be configured for your account including the ability to add and manage users for the groups. 'User Managers' have the ability to make these changes.

Email Your Users: A tool which allows you to email any or all the users of the account. Note, anyone with a login can email other users through BoardBook Premier.

View Previously Sent Emails: Review or forward emails previously you have sent from the 'Email Your Users' screen or sent as meeting notifications.

NOTE: Other users can access the four screens identified above through the same 'Users & Units' drop down. Users without the 'User Manager' permissions are limited to viewing lists of users and their email addresses, viewing units, emailing users, and viewing email they have previously sent from within BoardBook premier.

NOTE: On in the drop down as well as on some of the screens you will see references to 'Units' or 'Committees'. Units are subgroups within your organization such as committees or commissions. Working with units as well as configuring users access and permissions within units is covered in the handout 'BoardBook Premier – Working with Units'.

Setup a New User or Remove an Existing User:

Please see the 'Add New User' handout available on our support page.

Remove a user's access to BoardBook Premier

From the grey tool bar select 'Users & Units' then choose 'Manage all Users'

This screen will show a list of your users. Find the user's name in the list and click the 'Edit' link next to their name.

Find the orange 'Remove User from BoardBook Premier' button on the left side of the screen. Click the button to remove the user.

Update an existing user's permissions or information:

Overview: In BoardBook Premier, rather than assigning a user to a narrow list of user types, a user's capabilities are controlled by assigning permissions to that user. For example, while an Administrative Assistant at a school district would typically have the 'Agenda Manager' permission, it would not be unusual for them to also have 'Minutes Manager', 'Calendar Manager', and or 'User Manager' as well.

Update an existing user's permissions

From the grey tool bar select 'Users & Units' then choose 'Manage all Users'

This screen will show a list of your users. Find the user's name in the list and click the 'Edit' link next to their name.

This screen will show you the name of the user you selected in the upper left. It will also show the permissions that are available. Check a permission to add that permission to the user. Uncheck a permission to remove the permission.

Once you've made your updates click the blue 'Save User's Information' button in the upper left.

Update an existing user's information such as name, email address or password:

NOTE: A user can update their own information by logging in then clicking on their user ID in the upper left and selecting 'Manage Your Information'

From the grey tool bar select 'Users & Units' then choose 'Manage all Users'

This screen will show a list of your users. Find the user's name in the list and click the 'Edit' link next to their name.

NOTE: Any time a new user needs access to BoardBook, setup the new user following the steps in the 'Setup a New User' section of this handout. Please to not edit old user accounts with a new person's information. Always delete users who no longer need access by clicking the orange 'Remove User from BoardBook Premier' button on the left side of the screen.

In the left column of this screen find the 'View/Edit User's Information' link and click on it.

This will take you to a screen where you can update a user's information such as Last Name, Email Address, User ID. This is also where you can change a user's password.