BoardBook®

BoardBook Premier – Adding New Users

In BoardBook® Premier, adding users is done by a user who has both the 'User Manager' permission and the 'Organization Administrator' role. Note that a user with only the 'User Manager' permission can activate a user who has been deactivated and can update an existing user's permissions but cannot add a new user.

This document will go over the steps needed to create a new user as well as understanding how settings like Position impact the created user.

What information do you need to add a new user?

Name
User Email address   (the email address that system and meeting notifications should use)
User Password   (the user can change their password once they login)
User Position   (the position is essentially the category of the user, this is explained later in this document)
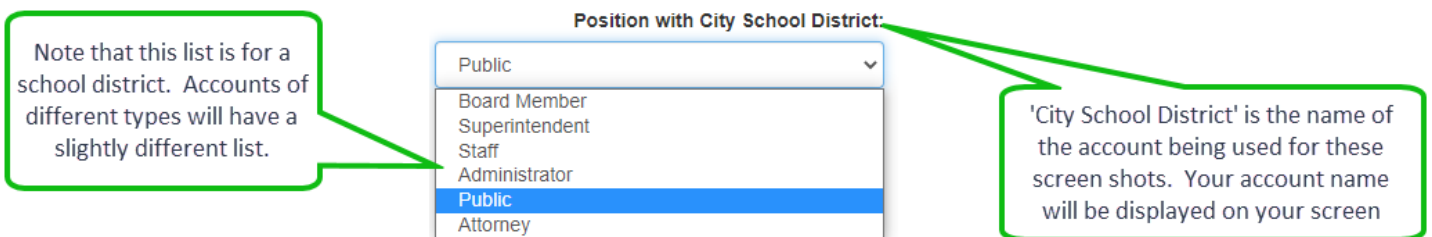User Permissions   (permissions are explained briefly later in this document, or in detail in the 'Understanding User Permissions' handout on the support page)

Note: While other information such as middle name, address, work email etc., can be added the only required information is Name, Email address.

User Position:

When you're adding a new user, you will need to assign a Position, selecting a position can automatically add a 'Permission', or 'Role' to the user's account so it should be selected carefully. When creating a new user position is managed in the right-hand column.
Here are the general Positions:

Note that this list is for a school district. Accounts of different types will have a slightly different list.

Position with City School District:

Public
Board Member
Superintendent
Staff
Administrator
Public
Attorney

'City School District' is the name of the account being used for these screen shots. Your account name will be displayed on your screen

Board Member:	Automatically assigns the 'Voting Member' permission
Superintendent or CEO:	Automatically assigns the 'Organization Administrator' role.
Staff:	Does not automatically assign any role or permission. Most non-Board / non-agenda creating users should be given this position.
Administrator:	Automatically assigns the 'Organization Administrator' role
Public:	Does not automatically assign any role or permission. (Rarely used)
Attorney:	Does not automatically assign any role or permission.

The 'Organization Administrator' role: In most cases there should only be two or perhaps three users in an account with this role. This roll allows users to manage the overall Organization account in

BoardBook Premier. For example, they can change the name of the organization, they can change the organization's address, phone number or social media settings within BoardBook. They can also change the security requirements for passwords. The recommendation is to not give this role to anyone who doesn't need the capability.

Users with both the 'Organization Administrator' role and the 'User Manager' permission have the additional ability to manage user settings and information that is unavailable to users with only 'User Manger', or 'Organization Administrator'.

Note that in addition to selecting the user's position with the program, there is a field for 'Other Position Title'. This can be used for the user's title at the organization or on the board, such as Assistant Director, or Board Chairperson.

Position with City School District:
`Public ▾`

`Other Position Title (optional):`

`Other Position Title (optional)`

'Other Position Title' allows you to add a job title such as 'Assistant Director' or such.

User Role:

While generally the User Role is added automatically as discussed above, there may be occasions where you want to specifically add or remove a role from a user. Below the position information in the right column' you can check or uncheck the User Role settings:

User Roles/Permissions:

☐ Organization Administrator
☐ Can Log Into BoardBook Premier
☐ Can Log Into Evaluator

Organization Administrator:	We've already described in the 'User Position' information
Can Log Into BoardBook Premier:	Useful if you want to temporarily prevent a user from logging in.
Can Log Into Evaluator:	Evaluator is a companion product we will offer in the future.

User Permissions:

Both the most common permissions and some common permission misunderstandings will be addressed here, for a full list of permissions and more detail please see the 'Understanding User Permissions' handout on the support page.

No Permissions: Note that for users who simply need to be able to login to the program to access materials which may not be available to the public you may not give any permissions at all. This categorizes the user as 'Anyone with a Login'. A user with no permission will have access to meetings once they've been published as well as any attachments or other files which are assigned either the 'Public/Anyone/Everyone', or 'Anyone With a Login' permissions.

Voting Member: Whether applied automatically or manually, we strongly recommend giving this permission to board members regardless of whether features like the minutes manager tools or Tier 2's electronic voting are being used.

Agenda Manger: Only users who need to be able to create and edit meetings and agendas should receive this permission.

Note   There is a specific permission 'Item Requester' which can be given to individuals who need to be able to create items for the agendas. See the 'Item Requesters and working with requested items' video on the support page for more information.

Notes on permissions we often see misapplied.

Agenda Reviewer: Not needed for anyone with the Voting Member or Agenda Manager permissions. There is a single exception and that is if you have a voting member who you want to be able to see the meeting while still in the 'In Development' status. If this is the case, they can be given the 'Agenda Reviewer: In Development' permission in addition to 'Voting Member.

Any permission with 'Manager' in the title is only for users that need to be able to manage, not just view, that specific type of content.

Creating the new user:

In the grey menu bar, use the 'Users & Committees' (sometimes listed as '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 a row of links, below that we have a blue 'New User' button.

TIP: If you are adding a user that already has access to BoardBook through another organization if you enter the same email address that is being used for the other account the user will be able to use their existing credentials to access both accounts.

NOTE: DO NOT recycle users. Updating an existing user account for someone different is something we strongly discourage. Create a new user account instead

Click on the blue 'New User' button to begin.

This will take you to a 'Manage' screen. You will be adding or selecting information in two columns.

The User's Information column:

This is where you will add information about the user, their name, email address and the password you want initially configured on the account. Be sure you remember or otherwise note the password as you'll need to provide it, the user ID, and a login link to your new user once the account has been created.

NOTE: The Email address in the first column is the address that will be used for meeting or system notices. This address will also be used the user's 'User ID'. The user can change this at any time after they login.

NOTE: Required items have a red asterisk, some items such as Address, and Phone Number have a red + (plus sign) indicating more than one entry can be made. Address and Phone Number are not required

Organization Information column:

This is where you add information about the user's relationship with the organization.

This allows an optional second Email Address to be added, it is not required and if added will simply be available within the program as additional information such as the phone number or address.

We've already discussed the Position, Other Position Title, and User Role. Fill or select these based on that information.

Now that we've added the user's information, we'll click the blue 'Save User's Information' button in the upper left.

This will take us to a screen labeled 'Manage BoardBook Premier Information for (account name).

This screen will allow us to select the needed permissions for this specific user. Remember that as previously mentioned, for users who only need to view information it's common for them to have no permissions on this screen.

Like most programs BoardBook recommends that unless a user needs to perform a specific task related to a user permission, they likely should not be given that permission.

As previously noted, user permissions are covered in detail in the 'Understanding User Permissions' handout on the support page.

What's next for you and your new user:

Remember you'll need to supply your new user with three things:

UserID: This will be the email address entered in the user's information column.
Password: This will be the initial password you entered for the user.
Login Link: https://login.boardbook.org

For Board members or other user who will simply be viewing materials this video may be helpful:

https://player.vimeo.com/video/454489361   This is a video titled Viewing or Reviewing a Meeting

For other users such as Agenda Managers please make sure they know how to get to our support page:
At the top of the screen click on the blue circle with the question mark ❓
Then choose 'BoardBook Help'