

BoardBook Premier – Manage Users

In BoardBook® Premier, managing users is done by someone with the 'User Manager' permission. The videos and handouts mentioned in this document can be found on our support page. The support page can be reached by clicking on the blue circle with the question mark (found at the top of the page) and selecting 'BoardBook Administration and Meeting Management Help'.

Managing users involves a fairly short list of tasks:

Setup new users	Refer to the Add a New User handout on the support page.
Remove a user's access to BoardBook Premier	page 2
Update a user's permissions	page 2
Update a user's information such as Name or Email Address.	Page 3

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.

Starting Screen:

All the user management tasks discussed in this department will start on the 'List of Your Users' screen. To get to this screen follow the steps below:

In the grey menu bar, choose 'Users & Committees' sometimes labeled 'Users & Units'.
Select 'Manage All Users'.

Remove a user's access to BoardBook Premier

There are two methods of accomplishing this:

The recommended method (which has less chance of accidentally removing the incorrect user)

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

The non-recommended method

From the 'List of Your Users' screen place a check in the box next to the user's name and click the yellow 'Remove User(s) From BoardBook Premier' button

Update an existing user's permissions:

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.

It may be helpful to review the 'Understanding User Permissions' handout

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. Note that the user may need to logout and log back in for the permissions to be applied.

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'. To update another user's information requires the 'Organizational Administrator' role.

To quickly determine whether you have the organizational administrator role follow these steps:

In the Gray Menu Bar click on Users & Committees (may be Users & Units).

Click on 'Manage All Users', if this is not seen you do not have this role.

This will show a list of all users with information about the users appearing in columns. If the columns 'Last Updated' and 'Last Activity' are seen, you have the 'Organizational Administrator' role.

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 do not edit old user accounts with a new person's information. Always remove users who no longer need access as described earlier in this document.

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.