

## Best Practices – User Management

BoardBook has a variety of settings related to setting up and configuring your users. From user account creation to configuring permissions, we have the best practices for you. 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'.

In this document we will discuss general best practices. Some of these practices may or may not apply to your specific organization.

### Yearly Maintenance

Perform a user review at least yearly

We strongly recommend reviewing the accounts for all users at least once per year. Check for the following:

Are there any users who are no longer with your organization, or no longer need, or should have access?

Are there any users whose responsibilities have changed and either no longer need the permissions they have, or need additional permissions?

Are there any users who need their information, such as name or email address updated?

Are there any users with the Organizational Administrator role, is that the appropriate level of access for that / those individuals.

### Setting up a New User

Use the guide

Unless this is something you do in BoardBook regularly we recommend using the 'Add a New User' document as a guide when setting up users.

Do NOT use the 'Administrator' position

When setting up a new user, the position of 'Staff' is almost always more appropriate than that of 'Administrator'. In BoardBook the position is not the same as job title. The position 'Administrator' gives a user the 'Organizational Administrator' role which has access to ALL documents, and other capabilities like adding users and renaming or changing settings for the organization. This is the 'administrator of the program'. We recommend no more than one or two users are setup with this position on the account.

Customize a user's position

If you want a user's position to reflect their title, or something different than 'Board Member', or 'Staff', the 'Other Position Title' can be configured when setting up a new user or updated by a user with the 'Organizational Administrator' role.

Understand user permissions

A quick review of the 'Understanding User Permissions' document can be helpful both before setting up users and before performing a user review.

### Assign permissions based on need

When assigning or reviewing permissions users should only have the permissions, they need to do what they need to do in BoardBook.

### User Permissions

#### Be Aware of how User Permissions relate to access to Documents and Attachments

In BoardBook certain Roles and Permissions have multiple purposes. These often give both additional functionality as well as added access to attachments and documents. This is something to be very aware of. Please see our document 'Understanding User Permissions'