

## Control when Meetings Lock

In BoardBook, by default accounts are configured so that the agenda is locked when meetings are published, and that both the agenda and minute are locked when the meeting is completed. Some organizations may want to set different options for this. This document may refer to videos or handouts on related subjects. These 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 cover the following subjects:

Why do agendas and minutes lock?	This page
What options are available	page 2
Making a change	page 3
Requesting a change	page 4

### Why do agendas and minutes lock?

The purpose of locking the agenda and minutes is to prevent a user from accidentally making changes to the information regarding these items. Any locked agenda or minutes may be unlocked by a user with the Agenda Manager permission. A padlock icon next to the meeting's date, time, title link indicates a locked meeting. Users without the Agenda Manager permission do not see these locks as they have no ability to make any changes. Note that regardless of any other settings, minutes and agendas are always locked when a meeting is archived.

## **What options are available**

There are four settings controlling if and when agendas and or minutes lock as follows:

Automatically Agenda-Lock Meeting Before it Starts (this is based on the start time of the meeting)

Options include 'Do not automatically Agenda-Lock meeting based on time' and then options to Agenda-Lock the meeting from 1 to 10 days before it is scheduled to start.

Automatically Minutes-Lock Meeting Before it Starts (this is based on the start time of the meeting)

Options include 'Do not automatically Minutes-Lock meeting based on time' and then options to Minutes-Lock the meeting from 1 to 10 days before it is scheduled to start.

Automatically Agenda-Lock Meeting at Status

Archive only

Published (and on Archive)

Automatically Minutes- and Agenda-Lock Meeting at Status

Archive only

Completed (and on Archive)

## Making a change

Note: ***Changing system settings incorrectly can cause issues which may be very difficult to recover from, should you choose to revert them at some point in the future. It is best to use caution, and not to assume the function of unfamiliar settings based off of their names. Please only change or update settings as specifically described in these instructions to ensure the best outcomes.*** Please remember that you always have the option to ask us to make the changes for you.

The user permission Settings Manager is required to make any changes in settings. To check for this permission, look at options in the gray menu bar, if you have settings listed you have this permission.

In the gray menu bar select 'Settings' and then 'Lock Options'

Based on the information seen in the 'What options are available' section, use the drop downs to review and make settings for any or all of the following settings:

Automatically Agenda-Lock Meeting Before it Starts (this is based on the start time of the meeting)

Automatically Minutes-Lock Meeting Before it Starts (this is based on the start time of the meeting)

Automatically Agenda-Lock Meeting at Status

Automatically Minutes- and Agenda-Lock Meeting at Status

## Requesting a change

Instead of making the change yourself, you can contact our support team and ask us to make the change for you. Below is the information we will need:

Before requesting any change, please ensure you fully understand both the capability described and the options which are available.

Overall, what do you want to change? Please refer to the subject of this handout.

Provide your choices for each of the settings below:

Automatically Agenda-Lock Meeting Before it Starts (this is based on the start time of the meeting)

Automatically Minutes-Lock Meeting Before it Starts (this is based on the start time of the meeting)

Automatically Agenda-Lock Meeting at Status

Automatically Minutes- and Agenda-Lock Meeting at Status