# BoardBook®

## Online Documents in BoardBook Premier

Storing Online Documents in BoardBook Premier is a BoardBook Premier Advanced Feature.  BoardBook allows you to do several things with your documents:

>    Make your documents easily available to your BoardBook users.
>    Make your documents easily available to your public.
>    Link online documents to an Agenda Item*
>                    *Provided they are in a 'Document Type' configured as a 'Book' type

In this document we will cover the following subjects:

NOTE: To manage your Documents a user must have the 'Document Manager' permission.

# Fundamentals

What is a Document Type?

In its simplest form a document type can be compared to a drawer in a filing cabinet.  Each drawer can contain folders and each folder can contain documents (files).

Understanding file permissions:

Permission levels are not explained in this document.  These are explained in the video 'Controlling Permissions to Agenda Item Fields and Attachments' and the document 'Understanding User Permissions' both are found on our support page which is access by clicking on the blue circle with the question mark and choosing 'BoardBook Administration and Meeting Management Help'.

Custom vs Default Document Types

Simply, default document types are those where the files are managed at the meeting or even agenda item level.  Custom document types are managed in more of an overall method.

For a more in-depth explanation see below:

In the screen shot below we see what is a fairly typical 'Manage Document Types' screen.
    Note that your specific screen may have these listed in a different order and may list 'Extras' instead of 'Supplemental Resources'



What we want to notice is that while the document types have different names, 'Documents' and 'Policies' have significantly different options than the other types listed.  Specifically, they have options that extend beyond simply 'View Documents'.  This is because in this screenshot 'Documents' and 'Policies' are what we call 'Custom' Document types.  When you see a message saying 'You are using 2 of the 5 Document Types', this is referring only to your 'Custom Document' types.

'Custom Document Types' can be thought of as those categories we manage at the document type level.  When I want to add a policy or document, I am going to do that in 'Policies' or 'Documents'.

'Default Document Types' can be thought of as simply containers for documents that are managed at the meeting or agenda level.  When I want to add an attachment, I'm going to do that by going to the meeting, then generally to the specific agenda item.

**Adding and Managing Your Document Types**

In the Gray Menu Bar select Documents then 'Manage Document Types'

You can add a new custom document type using the blue 'Add New Document Type' button.

You can edit an existing 'Custom' document type by clicking the name of the custom document type.

> Note that you can also make some changes to 'Default' document types. This is limited to updating the Title, Default Permission level, and making bulk changes to permissions.

Document Type Options:

Whether being added new, or being edited, by clicking on the document type name, have the following options:

Title:   This is the name of the Document Type (think of it as the name of the file cabinet drawer)

Default Permissions Level:     Any new documents added to this document type will have this starting permission level. If editing an existing document type, this will not change the permissions of any files already in the document type. Once a file has been uploaded into a document type, any desired permission can be selected.

> Note: When editing an existing document type, you can bulk change the permissions of existing documents here. We recommend contacting support for assistance with this.

Style:            Simply put, can the documents in this document type be linked within an agenda item, or would they need to be downloaded then uploaded as an attachment. With 'Book' style, linking documents in this manner is possible. With 'Store' style, linking is not possible. As this can be changed at any time the choice here isn't all that important.

For Users:      This is strictly a convenience setting. The options are 'None', 'Board Members' or 'Staff Members'. If 'Board Members', or 'Staff Members' this simply displays the folders and files for the document type in the right-hand column on the home page for members of those categories. This can be convenient to a point however if there are a significant number of folders and files the listing can get very lengthy. Note that regardless of this setting, a user will always have access to any display type folders and files to which they have access to via 'Documents' or 'Books' in the Gray Menu Bar.

Other options:

View Documents:      For a user with the 'Document Manager' permissions this behaves exactly as the 'Manage Documents.

Manage Documents:  Takes you to a screen where you can add, rename, and delete folders as well as add or manage documents.

Download Documents:        Allows you to download any or all files within a document type to either a single PDF, or ZIP file.

Delete Document Type:         This PERMANENTLY deletes the document type and all folders and files.

Permissions:   This allows you to designate user(s) without the 'Document Manager' permission to manage the folders and documents within a specified Document Type.  Note that a user with the 'Document Manager' permission can manage ALL document types.

**The Documents Screen**

There is a tremendous overlap in how content for the Books and Stores document styles are managed. With this in mind all sections of this document can be taken as being interchangeable with the exception of the final 'Link Policy (Book Style) Documents Within an Agenda Item' section. Navigation will be given as navigating to default Store style document type 'Documents' however the same management functionality can be found by navigating to Books / name of Books document type / Manage (name of Books document type)

In the Grey Menu bar click on 'Documents', in the drop-down menu choose 'Document' (or the name of the Document type for which you wish to manage folders and documents).

The Document screen is where you will add, rename, or delete folders, or upload, update, delete or set permissions for files within any of your Stores or Books document types.

The screen is laid out to show your document folder structure in a sidebar on the left and any documents within a selected folder in the central area.

The sidebar will show a folder structure much like your hard drive. As with a hard drive, folders can, with the exception of the 'No Folder' folder, be expanded, collapsed, added, deleted, or renamed.

Folders shown in the sidebar come in three types:

> Main folders, are the specific names of your Book and Stores Document Types. In the screenshot below you can see these match Documents (a Store type), and Policies (Book type) as seen in an earlier screenshot. These folders may be collapsed or expanded. A folder preceded by a right facing arrow is collapsed. Clicking on the arrow will expand the folder showing any folders within that folder. A folder preceded by a down facing arrow is expanded. Clicking on the arrow will collapse the folder.
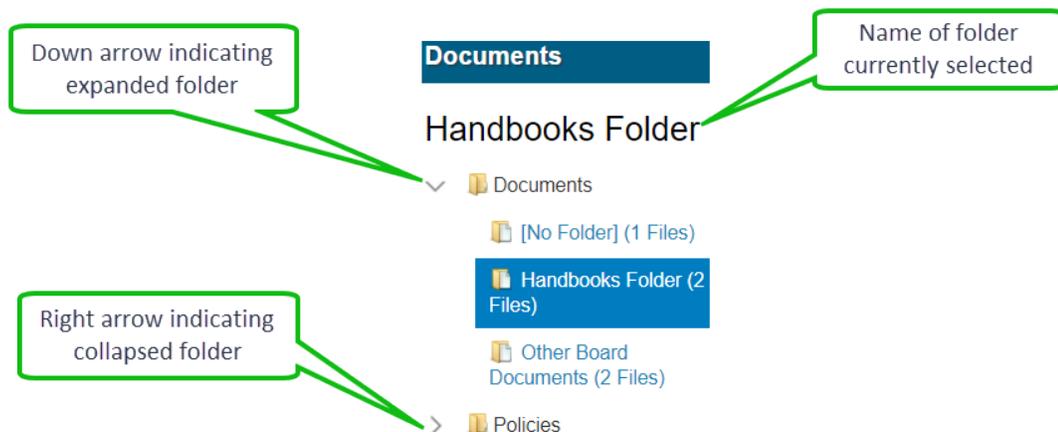


> Within each 'Document Type' you will see a special folder named [No Folder]. The [No Folder] is used by the system and cannot be renamed or deleted.

> In the screenshot above within the 'Document Type' titled 'Documents' you will also see I've added two 'Document Folders' named 'Handbooks' and 'Other Board Documents'. Document Folders are a way of segregating files within a Document Type. Document Types may contain folders, Document Folders cannot contain folders.

NOTE: Both 'Document Types' and 'Document Folders' will automatically be sorted alphabetically.

**Creating and Managing Folders within a Document Type**

Creating a new folder:       In the Document screen sidebar expand the folder for the document type where you wish to add a folder.  Click on either an existing folder within the document type, or the [No Folder] within the document type.  In the screenshot below see the 'Create Documents Folder', 'Rename This Folder' and 'Delete This Folder' options:
Note that the Create and Rename options will not be available if you have selected the [No Folder].
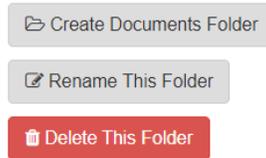


In the sidebar below the list of folders you'll see a 'Create Documents Folder'.  Click this to add a new folder.  As previously noted, your folder will automatically be added in alphabetical order.

Renaming an existing folder:  In the Document screen sidebar expand the folder for the document type that contains the folder you wish to rename.  Click on the folder.  In the sidebar below the list of folders you'll see a 'Rename This Folder' button.  Click this to rename your folder.

**Uploading and Managing your Documents**

Note:   If you are familiar with work with attachments, uploading and managing documents work the same way as working with attachments.

Uploading a document:        In the Document screen sidebar expand the folder for the document type where you wish to add a file.  Select the specific folder, or the [No Folder] where you wish to add the file.  In the main area of the screen you will see a gray 'Drag & Drop New Files Here' area containing a 'Click to Open the File Browser' button.  Either of these methods can be used to add a document.  Note multiple documents can be added at the same time by holding down the Ctrl key when selecting the files.
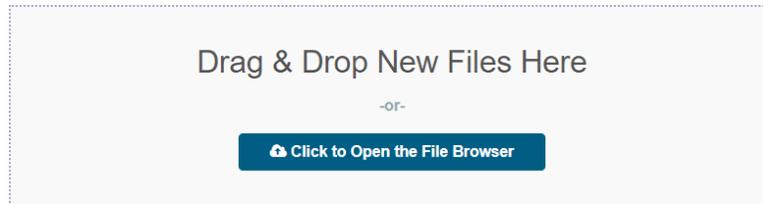


Managing your documents:   In the Document screen sidebar expand the folder for the document type where the file you wish to manage is located.  Select the specific folder, or the [No Folder] containing the file.  Once in that folder you can manage your files in any of the following ways:
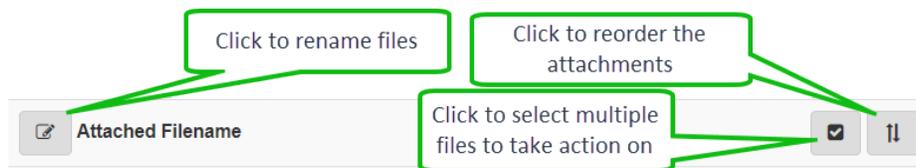


Rename a file:        Click on the gray 'Edit File Name' button in the gray area just above the top attachment.  Note, once clicked the Edit button becomes a Save button.  This will allow you to edit the names of any of the files in the folder.  You can also add or update a description for any file.  When you are done be sure to click the Save button.

Change the order of files:      Click on the 'Reorder' button on the right in the gray area just above the top attachment.  Once clicked a 'Save' button will appear to the left of the 'Reorder' button.  There are three ways to reorder:

        Drag and Drop, click on and drag the files into the order you want

        Alphabetically, click the button with the down arrow and AZ

        Numerically, click the button with the down arrow and 19

Regardless of the method you use to reorder click the blue save button once you are done to save your changes.

Bulk options, in the header, click the grey button with the check box.

Here you can select all or none, or individual files you want to take action on.  The actions available for bulk options are 'Set Permission' using the dropdown, 'Delete' using the red trash can button, 'Move to a different folder' using the dropdown.

Options available for each file:
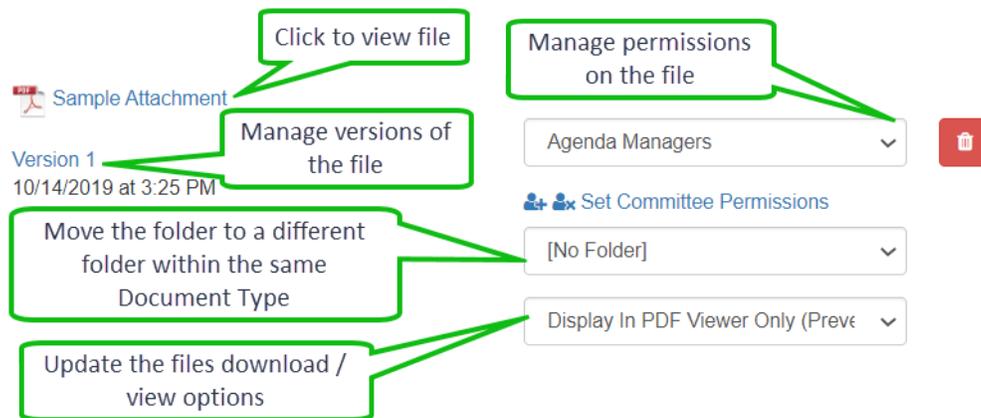


Delete a file:   Click on the red 'Delete' button, found on the right side of the screen.  Each file has its own delete button.  To bulk delete click the 'Select your Files Check Box' button towards the right in the gray area just above the top attachment.  Once clicked you can select all or none of the files, or using check boxes in front of each file select multiple files.  Once you've checked the files you want to delete click the red 'Delete' button on the right side in the gray area just above the top attachment.

Click to view file:       This will take you to a file details screen.  On this screen you can perform any of the following actions:

  Replace the file:        Use the blue 'Upload' button.  Note this will overwrite the original file.  Once the file is uploaded, the version number will increment.  If you wish to replace a file without incrementing the 'Version' information return to the file / folder management screen and delete the existing file then upload the replacement
  Rename the file:         Simply change the 'Document File Name', the change will be saved automatically.
  Add or update the description:        Add or update the 'Document Description', the change will be saved automatically.
  Update the permission level: Use the drop down in the 'Document Permission Level' field, the change will be saved automatically.
  Move the document to a different folder:     Use the drop down in the 'Document Folder' field the change will be saved automatically.
  View or Download the PDF copy of the file:  The PDF can be downloaded using the green 'download' button found in the upper left of the PDF view area
  Download a copy of the originally uploaded file:      Below the PDF view area on the left you will find a 'Download Original File' link
  Delete the file:         On the right side, below the PDF view area there is a 'Delete This File' button.

Review previous versions of a file:     Click on the version number found directly below the attachment name.
Set permissions for a file

Move the file to a different folder:     User the drop down to pick a folder to move the file to.

Set or update the files' download / view options:     Use the drop down

Manage the permissions for a specific file:          Use the drop down

Delete the file:          Click the red trashcan icon

Set 'Committee Permissions':          Click the link to set committee permissions.  Specifics on committee permissions can be found in the 'Adding, deleting and updating attachments' video on the support page.

# Linking Documents within an Agenda Item

The linking functionality will allow you to link to any document which is stored in a 'Book' style 'Document Type'.

This document has several sub sections as follows:
Linked Documents compared to Attachments
Permissions and Linked Documents:
Enabling the 'Policies' agenda item field
Linking Documents

<u>Linked Documents compared to Attachments:</u>

|  | Linked Document | Attachment |
|---|---|---|
| Can apply permissions within the agenda item | Yes* | Yes |
| In the agenda item individual items can have different permissions | No* | Yes |
| Available if source document is deleted | No | Yes |
| Updates if source document is updated | Yes | No |

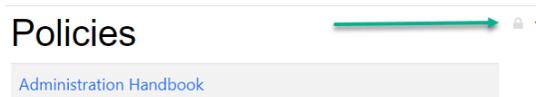* See next section for details.

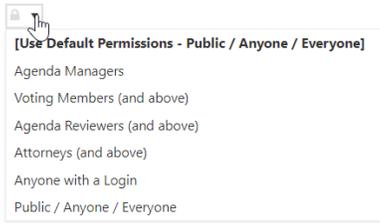<u>Permissions and Linked Documents:</u>

Two different permission settings are involved with linked documents as follows:

The permission specifically assigned to the document within online storage. Each file can have its own permission.



The permission assigned to the 'Policies' as an agenda item field. The field permission applies to ALL linked documents on the specific agenda item.

[Use Default Permissions - Public / Anyone / Everyone]
Agenda Managers
Voting Members (and above)
Agenda Reviewers (and above)
Attorneys (and above)
Anyone with a Login
Public / Anyone / Everyone

These permissions are applied as follows:

The permission assigned to the 'Policies' agenda item field is considered first.
The permission assigned to the document within online storage is then considered.

Here are three examples:

'Policies' agenda item field set to 'Public / Anyone / Everyone'

| Document Permission | Shows on Public Page | Visible to Anyone with Login | Visible to Voting Member |
|---|---|---|---|
| Public / Anyone / Everyone | Yes | Yes | Yes |
| Anyone with a Login | No | Yes | Yes |
| Voting Member (and above) | No | Yes | Yes |

'Policies' agenda item field set to 'Anyone with a Login'

| Document Permission | Shows on Public Page | Visible to Anyone with Login | Visible to Voting Member |
|---|---|---|---|
| Public / Anyone / Everyone | No | Yes | Yes |
| Anyone with a Login | No | Yes | Yes |
| Voting Member (and above) | No | No | Yes |

'Policies' agenda item field set to 'Voting Member (and above)

| Document Permission | Shows on Public Page | Visible to Anyone with Login | Visible to Voting Member |
|---|---|---|---|
| Public / Anyone / Everyone | No | No | Yes |
| Anyone with a Login | No | No | Yes |
| Voting Member (and above) | No | No | Yes |

Note:   The default permission for this field can be set when the field is enabled in the next step.
Note:   As with all agenda item fields except 'Subject', the permissions for a field can be changed for any specific agenda item.

Enabling the 'Policies' agenda item field

Note:  These steps will need to be performed by a user with the 'Settings Manager' permission.

In the Gray Menu Bar select 'Settings' and then 'Meeting & Agenda Options'
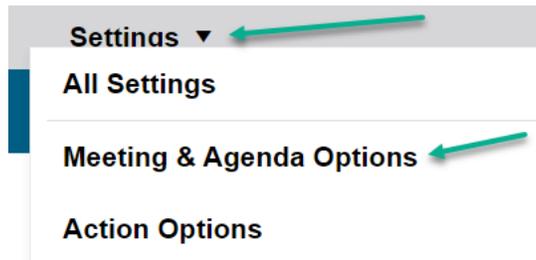
This will take you to that section of the Settings.



Scroll down until you find the 'Policies' section as shown below:



Check the 'Enable this Section'
Use the permissions drop down if you want the default permission to be something other than 'Public / Anyone / Everyone'.
In the right-hand column you can check which sections of the public page will include this information.  NOTE for Public Notice, Public Agendas, and Public Minutes this will only impact the system generated 'Quick View' of these documents.  For versions of these documents created via the Agenda Report, Minutes Report, or Public Notice download the respective 'Report Template' will need to be updated.  See the 'Working with Report Templates' handout on the support page.

Linking Documents

Once the field has been added you'll see that field appearing in your list of agenda fields such as Subject, Presenter, or Description.  Generally, 'Policies' will appear at the bottom of the list.  In the screenshot below we see that in the training account it appeared below the Attachments field.
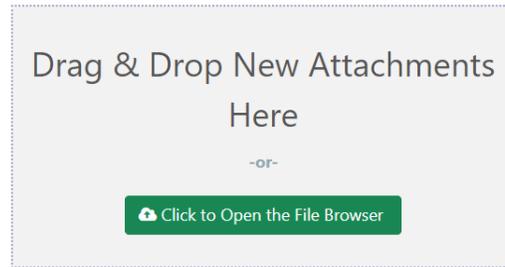
Click on the green 'Select Policies for this Agenda Item.
This will open a screen showing all of your 'Book' style Document Types, each of the folders and documents within these Document Types.

In the screen shot below, I have two different 'Book' style Document Types as follows:

Handbooks and other Documents which has a single folder titled Handbooks with three files

Policies, which has multiple folder although only 'A. District Foundations' is seen. Within that folder we can see a single document.
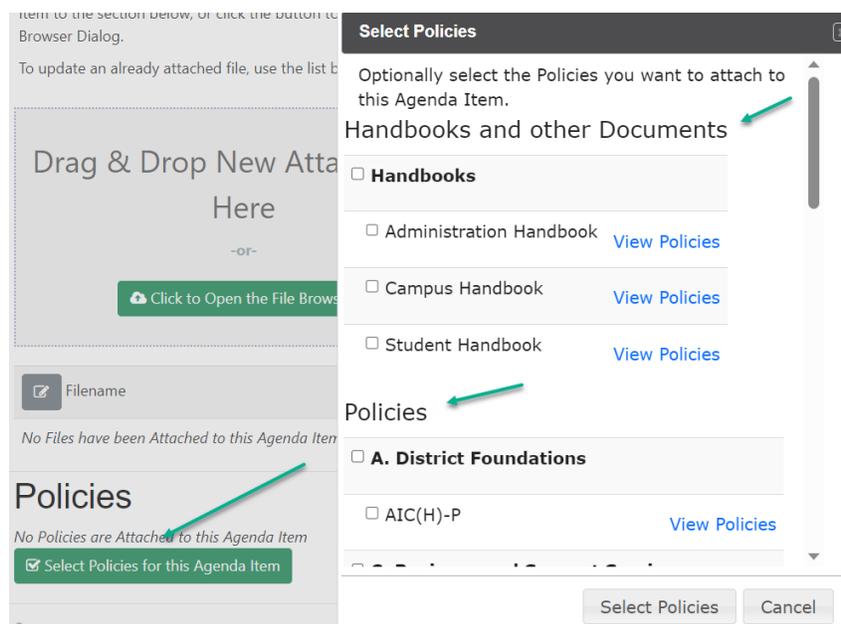


Check each of the files you want to link in this Agenda Item.
Click 'Select Policies' once you have made your selections.

You'll now see the links you selected as shown below:

**Policies**

Administration Handbook

AIC(H)-P

CCB(H)-P

CHE(H)-P
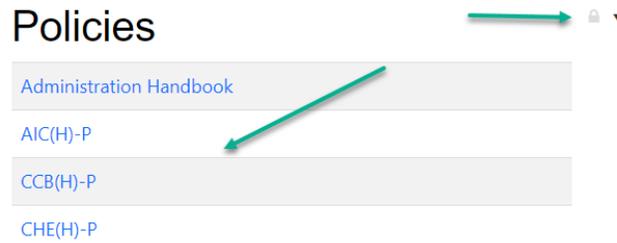
Note that like every agenda item field except Subject there is a faint gray padlock to the right of 'Policies' which can be used to select a different permission for these links.  How these permissions work in conjunction with the permissions of the files you are linking is discussed in the 'Permissions and Linked Documents' subsection of this Linking Documents within an Agenda Item section.

**Bulk Downloading your Uploaded Documents**

For any of your document types a user with the 'Document Manager' permission will have the ability to download any or all the documents within that document type which are not set to prevent downloads.

This is seen on the 'Document Types' screen. This screen is reached by either clicking 'Documents' in the Gray Menu Bar, and then selecting 'Manage Document Types, or similarly clicking 'Books' in the Gray Menu Bar, and selecting 'Manage Document Types'.

On this screen, for any 'Custom Document Type' we will see a 'Download Documents' option.
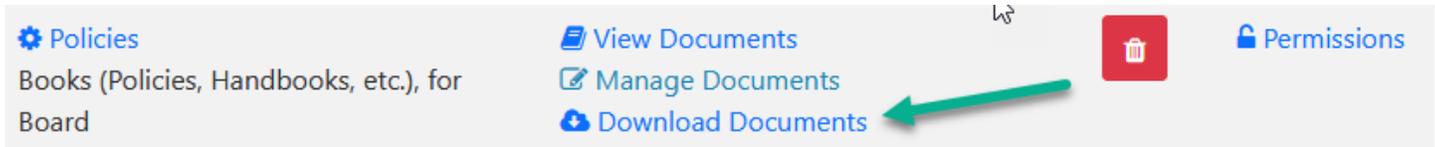


Clicking on this will take us to a 'Download Documents – (document name). In the screenshot below we can see I've chosen to 'Download Documents' for a document type named 'Policies'



As seen in the screenshot above we will find the following options:

Download button:     Found both at the top and bottom of the listed options and files, this will download a file based on selections made regarding 'Download Format' and which documents are checked or unchecked.

Download Format:     This drop down allows you to choose how the selected files will be downloaded.  The choices are as follows:

One PDF:        This will download a single PDF containing all the checked files in the order those files are listed.

In a ZIP file:    This will download a single ZIP file containing individual PDFs of all the checked files.

Original Format:    This will download a single ZIP file containing files of the originally uploaded file type, for example Word or Excel, of all the checked files.

List of Files:          This will list all the files within the document type which are eligible for download.  The files will be organized by the folders within that document type.  Each file will have a check box to the left of the document name.  An unchecked document will be excluded from the download.

Once you have made your selections and clicked the Download button a notice will appear in the lower right of the screen.



Once the file is compiled and ready for download you will see a notification indicator in the blue circles in the upper right of your screen.



Clicking on the notification indicator will show any notification, or notifications similar to shown below:
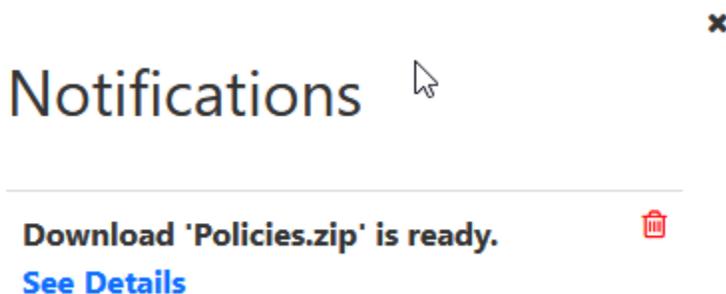


Once you click on 'See Details' in the notification, the file will be downloaded.  This will either download to your downloads directory, or whatever directory you have configured for your browser to download to.

In addition to the notification within the program you will be sent an email notification that the download is ready.  The subject of this email will be 'BoardBook Premier Download is Ready'. Clicking the link in this notification email will take you to your BoardBook screen and start the download.