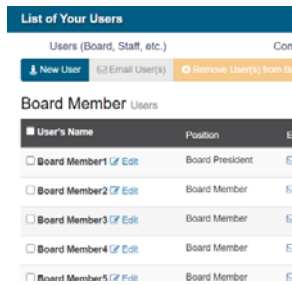


User Management

To access BoardBook Premier’s user management interface, select “Users & Committees” from the grey navigation bar and then select “Manage All Users.” From this page the User Manager can add or edit users and permissions.



To create a new user, click the blue “New User” button.

To edit a user’s information or permission levels, or to reset a user’s password, click the blue “Edit” text to the right of the user’s name.

To remove a user from your BoardBook Premier account, click the checkbox to the left of the user’s name and then click the yellow “Remove User(s) from BoardBook Premier” button.

Resetting User Passwords

To reset a user’s password, select “Users & Committees” from the grey navigation bar, select “Manage All Users,” and then click “Edit” next to the user’s name. From this page, click “View/Edit User’s Information.” You will see three columns on the next page; in the second column, below the “User’s Information,” click the button “Generate and Email New Random Password.” This will automatically email the user a temporary password they can use to login; they can create a new password afterwards.

Assigning User Permissions

Permissions:

- Agenda Manager
- Minutes Manager
- Meeting Leader
- Agenda Reviewer: In Development
- Agenda Reviewer: In Review

- Voting Member
- Agenda Item Requestor
- Attorney
- Vote Tiebreaker

- Document Manager
- Link Manager
- Goal Manager
- Calendar Manager
- Settings Manager

- User Manager

User permissions are assigned by selecting from a series of options on the user management screen. Each user can have any number of these options selected, allowing for the creation of custom user roles.

Permissions for a new user are assigned at the time a user is created; but may be added or revoked at any time.

NOTE: It is not necessary to give a user any permissions. A user with no permissions has access to any materials such as attachments or links which have been set to be available to ‘Anyone with a Login’ or ‘Public/Anyone/Everyone’.

For new accounts, at least one ‘User Manager’ will always be created. It is a best practice for an organization to have at least two User Managers, however, because of the level of control a User Manager has it is a best practice to limit that role to only those who need its capabilities.

User Permissions

When you create user's account, you will assign permissions based on the tasks that individual will need to accomplish. A single user may have one or many permissions.*

Permission	Task Description
Agenda Manager	Create meetings, edit agendas, change meeting status
Minutes Manager	Record votes and attendance, manage discussion during the meeting, create minutes report, change meeting status to 'Completed.'
Meeting Leader	Control the agenda view displayed for persons using 'Follow the Leader' and 'Projector Page.' Manage 'Raise Hand.' Note: These features are optional.
Agenda Reviewer: In Development	View meetings and agenda information when the meeting is in the 'In Development' status. Note: Can view only, cannot make changes.
Agenda Reviewer: In Review	View meetings and agenda information when the meeting is in the 'In Review' status. Note: Can view only, cannot make changes.
Voting Member	Can view meetings in 'In Review' or 'Published' status. Can use electronic voting, if being used (Tier 2 feature).
Agenda Item Requestor	Can request an item be added to a future meeting. Note: Cannot directly add items to an agenda nor edit items after they have been added to an agenda.
Attorney	View meetings and agenda information when the meeting is in the 'Published' status. Note: Can view only, cannot make changes.
Document Manager	Can create, edit, and delete documents and document types (Tier 2 feature). Note: Does not apply to meeting attachments.
Links Manager	Can create, edit, and delete organizational links. Note: Does not apply to links within an agenda which are managed by the Agenda Manager, nor does this apply to the meeting links added to calendar by the meeting creation / status change process.
Goal Manager	Can create, edit, and delete organizational goals. (Tier 2 feature).
Calendar Manager	Can create, edit, and delete events on the organizational calendar. Note: Meetings automatically appear on the calendar based on the meeting's status and the user's permissions.
User Manager	Can add or delete users and assign or change permissions to any user. Add update or manage 'Units' (committees, commissions, etc.)

**Not all permissions will be available for all accounts. Some user permissions and functions require Tier 2 access to BoardBook Premier.*

Below are some examples of typical types of BoardBook users and what type of permissions they *might* need to have to get their tasks done. These are merely examples; as you add users think about the tasks those users will be performing in BoardBook and assign permissions accordingly.*

Title	Typical BoardBook Permissions Might Include
Superintendent/CEO (who actively works with agendas)	Agenda Manager, Meeting Leader, Document Manager, Link Manager, Goal Manager, Calendar Manager, User Manager
Superintendent/CEO (who does <i>not</i> actively work with agendas)	Agenda Reviewer: In Development, Agenda Reviewer: In Review, Meeting Leader
Administrative Assistant	Agenda Manager, Minutes Manager, Document Manager, Link Manager, Goal Manager, Calendar Manager, User Manager
Other Administrative Staff	Agenda Item Requestor
Board President	Voting Member, Meeting Leader, Agenda Reviewer: In Development
Board Secretary	Voting Member, Minutes Manager
Board Member	Voting Member, Agenda Item Requestor
Attorney	Agenda Reviewer: In Review, Attorney
IT Manager	User Manager

**Not all permissions will be available for all accounts. Some user permissions and functions require Tier 2 access to BoardBook Premier.*