

BoardBook Premier - Understanding User Permissions

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.

When you create user's account, you will assign permissions based on the tasks that user will need to accomplish. A single user may have one or many permissions depending on what they need to be able to do. Here's a list of permissions and the tasks associated with that permission.

NOTE: Not all permissions may be available for all accounts.

Permission	Task Description
Agenda Manager	Create meetings, edit agendas, change meeting status
Minutes Manager	Take Actions, Take Attendance, Manage Discussion during the meeting. Create Minutes Report Templates, change meeting status to Completed
Meeting Leader	Control the agenda view displayed for persons using 'Follow the Leader' or if 'Projector Page' is used. Manage 'Raise Hand' if that function is being used
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). This is your typical 'Board Member' or 'Committee Member'
Agenda Item Requestor	Can request an item be added to a future meeting.
Attorney	No rights by itself but other permissions, such as Agenda Reviewer, can be applied
Document Manager	Can create, edit, and delete documents and document types (not available for all accounts). NOTE: Does not apply to attachments which are managed by the Agenda Manager.
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.
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.)

Now let's look at some typical types of BoardBook users and what type of permissions they might need to have to get their tasks done. Obviously, these are just examples, as you add users think about the tasks those users will be performing in BoardBook and assign permissions based on those tasks.

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 not 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

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'.

Permissions for a user can be assigned at the time a new user is created or added or revoked at any time.

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.