Quick Reference Guide

This reference sheet is designed to provide short reminders of how to perform common tasks within BoardBook Premier; click on the hyperlinks for resources on each topic. For detailed information, refer to the official **BoardBook Premier Training and Support Resources** page. Download and save a copy of this document for future reference. It will be periodically updated to reflect new training materials and program features. (last updated: 7/26/2022)

BoardBook Premier Login

https://login.boardbook.org/
Your BoardBook User ID will usually be an email address. If you have forgotten your password, you can click on the Forgot password? on the login page for assistance.

Creating a Meeting: From the homepage or Meetings, Minutes and Agendas screen, click the Create New Meeting button. Only Agenda Managers can create meetings. On the following screen, select options for creating your meeting and click the Save & Add Agenda Items to Meeting at the bottom to begin building your agenda.

Adding New Items or Sub-Item: Click the blue '+ Create Meeting Agenda Item' button in the floating toolbar above the Meeting Agenda Items. You can set the new item's location under the Agenda Item's Positioning Information section.

Importing Agenda Items: Click the gray '+ Import Agenda Item' button in the floating toolbar above the Meeting Agenda Items. Select the meeting from which you would like to import items in the From Agenda dropdown menu and then check off any items that you would like to import. Use the Parent Agenda Item and Before Agenda Item drop down menus to determine the placement of the copied item(s).

Copying Agenda Items: Copy items from the meeting you are working on, to a different unlocked meeting. Check the items you wish to copy then click the light gray 'Copy' button found in the floating toolbar above the Meeting Agenda Items.

Rearranging Agenda Items: Click the blue Re-order Agenda Items button above your agenda items. Drag and drop agenda items to rearrange their order and click the green Save New Agenda Item Order button.

Move Attachments: Click the blue Move Attachments button above your agenda items. Drag and drop attachments between agenda items and click the green Save New Attachment Order button.

Note: This tool is only for moving attachments between different agenda items. Rearranging attachments within an agenda item must be done on the 'Edit Agenda Item' screen.

Adding Attachments: From the Create or Edit Agenda Item screen, scroll to the Attachments section. You can either click to Open the File Browser or drag and drop your attachments for that agenda item into the gray box.

Meeting Statuses

In Development: This the default Meeting Status as you begin drafting your agenda and uploading your meeting materials. During the In Development status only Agenda Managers and Agenda Reviewer (In Development) can see the meeting.

In Review: This releases the meeting agenda and materials to your board. Once you update to In Review, all Voting Members and Agenda Reviewers (In Review) will be able to see the meeting.

Published: This is the Meeting Status that releases the meeting to the public and publishes the agenda and any attachments you have made available for the public to your organization's public page.

Completed: This is the Meeting Status that releases the approved minutes for that meeting. Make sure that you upload the approved minutes as the 'Custom Minutes' first, before updating the meeting status.

Update the Status of Multiple Meeting Simultaneously: From the gray navigation bar at the top of the screen, click Meetings and select Meetings, Minutes, and Agendas. Click Change Meetings (above you list of meetings). Check off the meetings you want to update, select the desired Meeting Status from the dropdown at the top and click the blue Save button. *Note: You do not need to change a meeting status to make an update to an agenda item or attachment; simply make your change in BoardBook Premier and everyone's meeting information will update automatically.*

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Accessing Meeting Information

The homepage will display a limited list of the newest meetings. If the meeting you want is not on that list, click on Meetings on the grey menu bar at the top of the screen, and then select Meetings, Minutes, and Agendas. Once you've found your meeting, click on the date/time/meeting title link. This will display a list of viewing options for that meeting.

View Meeting Details (Join Meeting) gives you the most interactive online view of the meeting, allowing you to do things such as take notes and follow the leader online.

Meeting Quick View will provide you an agenda style layout of the meeting with links to accompanying attachments under the parent agenda item.

Agenda Report will allow you to download and/or print a copy of the agenda and all attachments.

Minutes can be recorded by the Minutes Manager during the meeting with three built-in tools that can be accessed from the View Meeting Details perspective during the meeting.

Discussion allows the Minutes Manager record notes during the meeting that can later be incorporated into the official meeting minutes.
Attendance allows the Minutes Manager to record which board members are present or absent. You can take attendance more than once per meeting – this is useful if a board member arrives late or leaves early.

Take Action allows the Minutes Manager to record a motion, who made and seconded the motion, and any votes taken for any item during the meeting. While editing your agenda it is possible to prepopulate your motions via the "Recommended Motions" field; you will be able to adjust that as necessary during the meeting.

Download the Minutes Report: Click on the date/time/meeting title link for the meeting and select the Minutes Report download link. It is recommended that you download it as an MS Word file so that you can make any necessary updates or corrections.

Upload Minutes: Click on the date/time/meeting title link for the meeting, select Upload Custom Minutes, and choose the document that you wish to upload. *Note: The meeting status will have to be set to Complete before people can view your uploaded minutes.*

Archived Meetings can be accessed by clicking on View Archived Meeting from your Meetings, Minutes, and Agendas page (from the gray navigation bar at the top of the screen, click Meetings and select Meetings, Minutes, and Agendas). By default, Completed meetings are automatically archived after 13 months; but this setting may be adjusted in the Archive Options under Settings.

User Management

Add a new user: Access BoardBook Premier's user management interface by selecting Users & Committees from the grey navigation bar and then clicking Manage All Users. Then simply click the blue New User button. Refer to the User Management Guide for details on the various permissions.

Reset a user's password: Select View/Edit User's Information and click the Change Password. This will allow you to assign a new password that the user can update later.

Remove a user: From the user management screen, click the Edit button next to the user you wish to remove and then the yellow Remove User from BoardBook Premier button.

Additional Resources & Support

The official **BoardBook Premier Training and Support Resources** page has quick access to video tutorials and pdf guides to help you get the most out of BoardBook Premier.

If you have and additional questions, please let us know – **support@boardbook.org** | 888.587.2665.

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