

NSBTM Website Procedure – How To Add People as Users

Log in and Credentials

1. Open the website <http://nsbtm.org> in any browser
 - Click in the Board Room login area and enter your username and password
 - Scroll to the bottom of the Board Room menu and select **Dashboard**

Adding a New Board Member, Representative Council Member or Advisory Board Member as a New User so they can view items in the Board Room

1. To complete this task you will need to know the member's email address.
 - Send the individual an email message telling them their Username for the Board Room and alerting them to watch for a separate email message providing their Password.
 - * Carbon Copy the Board Chair and Board Secretary so they will know that this activity has been completed.
2. Scroll down the Dashboard and hover over **Users** and select **Add New**
 - The **Username** is always the person's *FirstnameLastname*, capitalized as shown and with no space between the names.
 - Their **E-mail** address is a required field.
 - **First Name** and **Last Name** are as they appear on the Board Members pages.
 - **Website** is left blank.
 - **Password** should be 8 characters and include 2 upper case letters, 2 lower case letters, 2 numbers and any 2 of these symbols: ! " ? \$ % ^ &)
 - * There is no need to keep a copy of this password. If someone forgets their password, the website provides tools for resetting it automatically by clicking on **Lost Password** under the Login option.
 - Put a check in the Box to **Send this password to the new user by email.**
 - The **Role** for most people will be **Board Member**. This gives them viewer privileges to the entire Board Room.
 - * Give someone an **Administrator** Role if they are being granted permission to change content on the website.
 - Click the blue **Add New User** button to complete the process.

Removing a Board Member, Representative Council Member or Advisory Board Member or changing the Role for a Username

1. Scroll down the Dashboard and hover over **Users** and select **All Users**.
2. To Delete a member who has left the Board, start by putting a checkmark in the box before the Username of the person you want to Delete.
 - As you scroll over their name, select **Delete**.
 - If the person's role has only been a **Board Member** you can **Delete all content**.
 - If the person has been an **Administrator**, you should **Attribute all content to:** another Administrator.
 - When in doubt *Attribute* content to someone else rather than *Deleting* content.
 - Click the button to **Confirm Deletion**.
2. To change the Role for a Board member, start by putting a checkmark in the box before the Username of the person you want to change.
 - As you scroll over their name, select **Edit**.
 - Scroll down and change the Role to **Administrator**
 - Click the blue **Update User** button to save the change.
3. Click on another Dashboard item (Pages, Appearance, Smart Blocks, etc.) to leave the Users area.
4. When done making changes, **Log Out** in the upper right corner.