



A Guide to managing Committee and User groups in Convene

Most administrators would agree that setting up user profiles, creating committee groups, and defining the roles and permissions is an integral part of Board Portal functionality. When it comes to the management of committee and user groups, Convene offers easy and effective management at a high degree of granularity.

*Convene is designed to be
Smart Simple and Secure*



“As documents are so easily accessible with Convene, there is a smoother meeting flow and discussions can continue unhindered since all attendees have access to the same information”

Sarah Carrodus, Partnership Board Support, and Personal Assistant to the Global HR Director at Linklaters LLP

Linklaters

Creating and managing User profiles and Committees in Convene is a simple process that saves you time and effort. We believe that the administrators should have full autonomy over user management.

Creating and Managing user profiles:

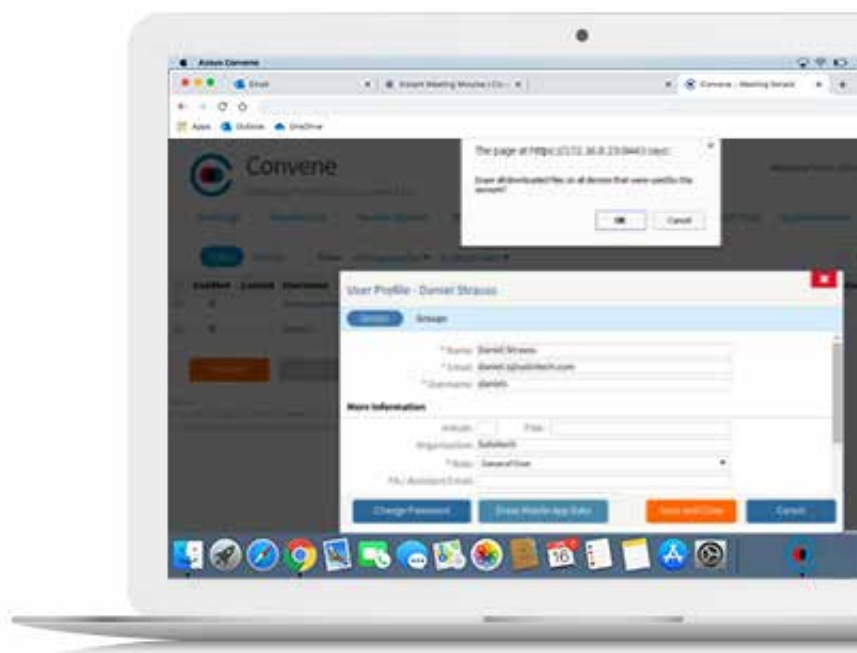
User profiles can be created by the administrator with information on attendees' names, email addresses and system roles through the administrative portal. Additional fields for phone numbers and other details may also be added.

Once created, Convene allows administrators with the correct permissions to easily view and manage permissions and licences allocated to users using the Convene web portal. Convene allows user accounts to be disabled and reassigned, giving greater flexibility. Accounts that are disabled free up their associated licence for assigning to new or re-enabled user accounts - this license is available for immediate re-use.

Creating Committees:

Committees and groups can be defined in order to manage many individuals with a single click, saving you precious time.

Committees can be set up through the Accounts menu. Users can be added or removed from a committee either through the groups tab or through the individual user account. This means that an administrator can add a user to the accounts menu and then add that user to the appropriate committees through a single interface.



“ We recently asked Convene if we could have two different administrator levels. We wanted a ‘super-user’ level to have control over creating accounts and configuring settings, with the secretaries who create the meetings and add the papers being administrators. That was implemented for us and gave us exactly what we wanted.”

Anne Greaves, Digital Communications Officer at Sheffield Children's NHS Foundation Trust



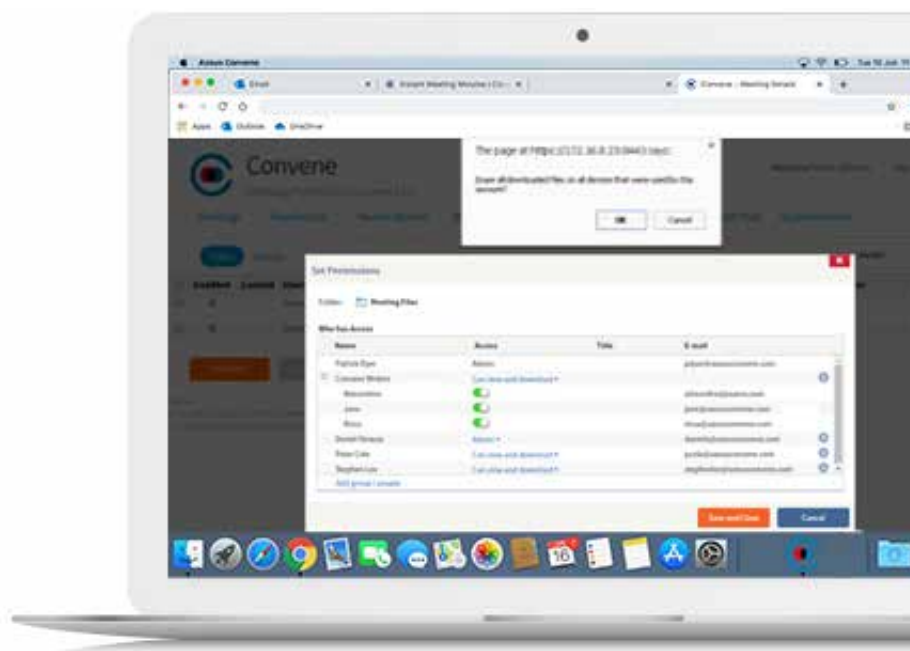
When it comes to maintaining high levels of security, granular access controls are essential. That's why Convene lets administrators define user roles and permissions with a high degree of granularity.

Permission granularity:

Administrators can choose to allow access at the level of entire meetings or folders; or they can choose to restrict access to individual agenda topics or files.

Meeting participants are assigned roles that define what they can do with the board material and during the live presentation. These meeting roles can be configured by the administrator in the System Administration pages.

On top of permissions control for Meetings, Convene also supports permissions control for documents in the built-in Document Library. Administrators can customize access control permissions for individual users or committees. User permissions may be managed on a folder, subfolder or individual document level.



“ We have the ability to control people’s permissions, so by default nobody is able to download anything unless they are an administrator within the Company Secretarial team, and this provides added security in the case of a bad leaver.”

Kye Pearson - Company Secretary at London Metal Exchange



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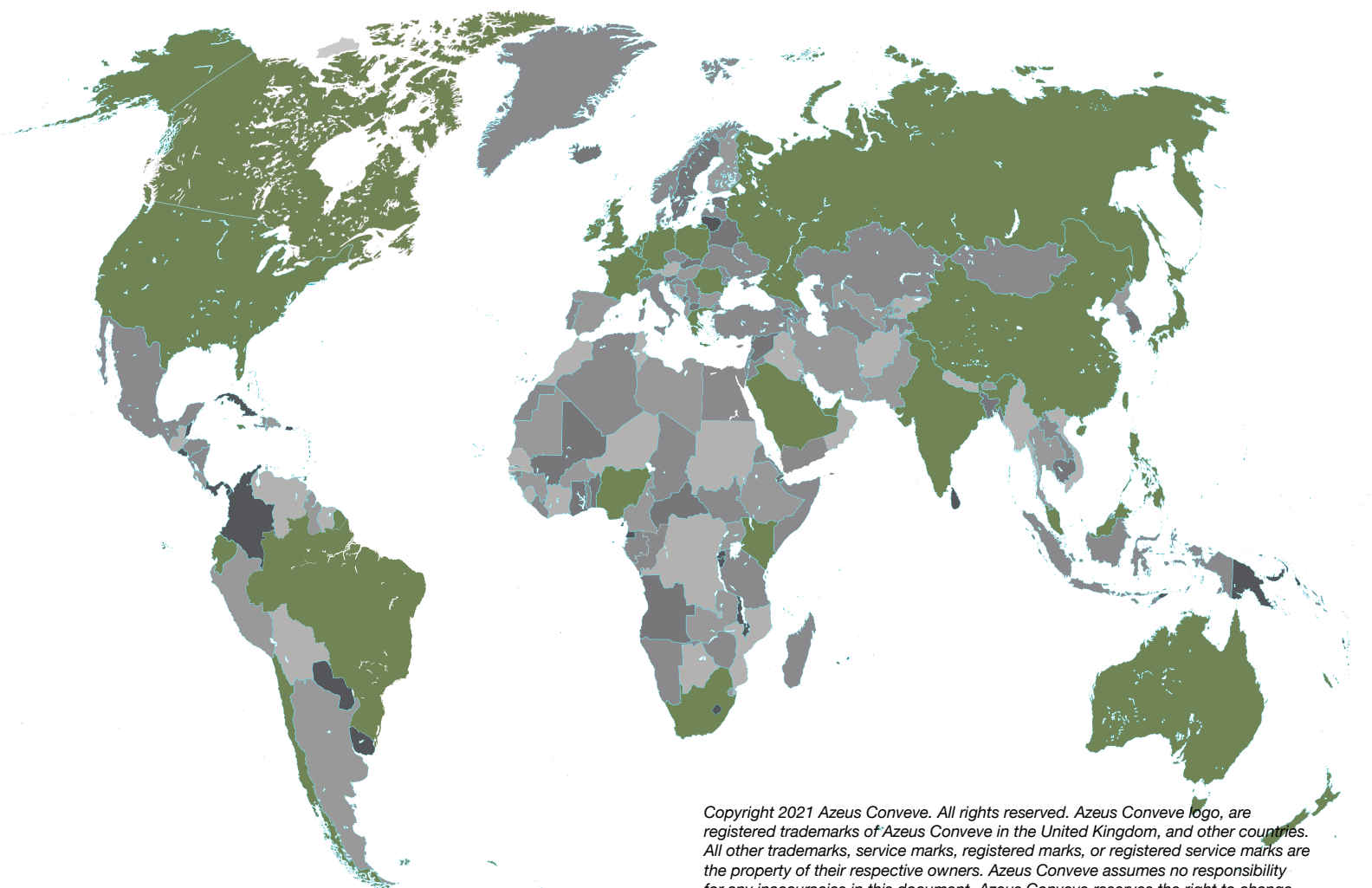
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Don't just meet – Conveve