OnBoard

Complete Meeting Checklist

This checklist provides step-by-step guidance for new Meeting Admins to set up, manage, and publish an OnBoard meeting from start to finish.

- ☑ Create Agenda
- ☑ Add Agenda Documents
- ☑ Publish Meeting
- ☑ Publish Minutes

Find more trainer-readiness resources in the [Train-the-Trainer Toolkit](#).

For additional questions or technical support, email help@onboardmeetings.com.

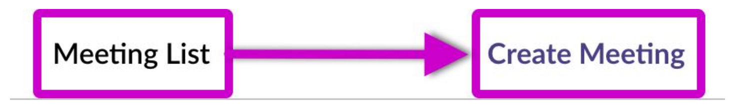
Updated Date: March 2026

i Before You Start

☐ Confirm the correct [Group](#) exists for your board or committee
☐ Create or update Groups as needed and add members

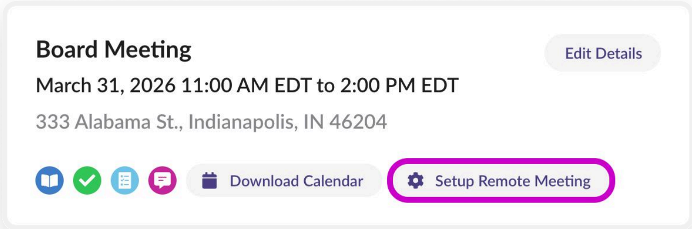
1 Create the Meeting

☐ Go to [Meetings](#) and create a new meeting
☐ Enter **Meeting Name, Date/Time, and Location**



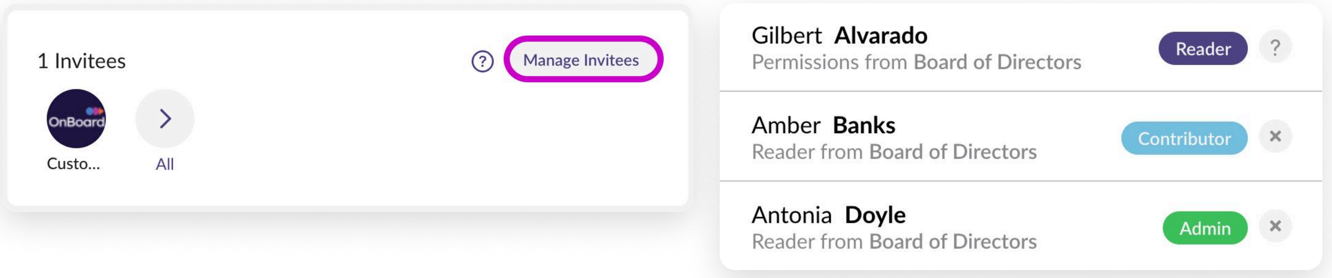
2 Remote or Hybrid Meetings

☐ Configure [Remote Meeting](#) details



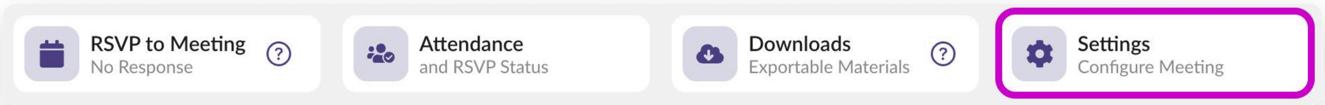
3 Invitees & Permissions

☐ [Add Invitees](#) by Group
☐ Manage Permissions (Admin, Contributor, Reader)



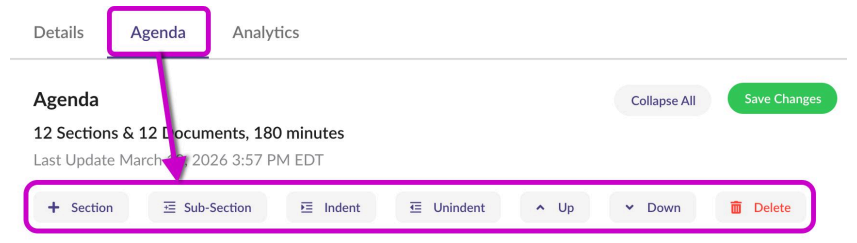
4 Meeting Settings

☐ Select [Settings](#) to manage individual meeting settings (Table of Contents, Downloads)



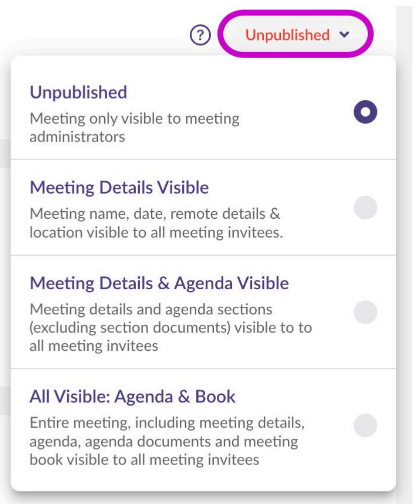
5 Agenda & Materials

☐ [Create Agenda](#) sections and sub-sections
☐ [Edit Section Details](#) (titles, durations, presenters)
☐ Upload and organize documents by section



6 Publish & Notify

☐ Set the appropriate [Meeting Visibility](#) and send notifications



i Minutes: During or After the Meeting

☐ Capture minutes using [Minutes AI](#) or [Minutes Builder](#) (if available)

i Time-Saving Tip

☐ [Duplicate](#) a previous meeting or use a [Meeting Template](#)