OnBoard

END-USER

Quick Reference Guide

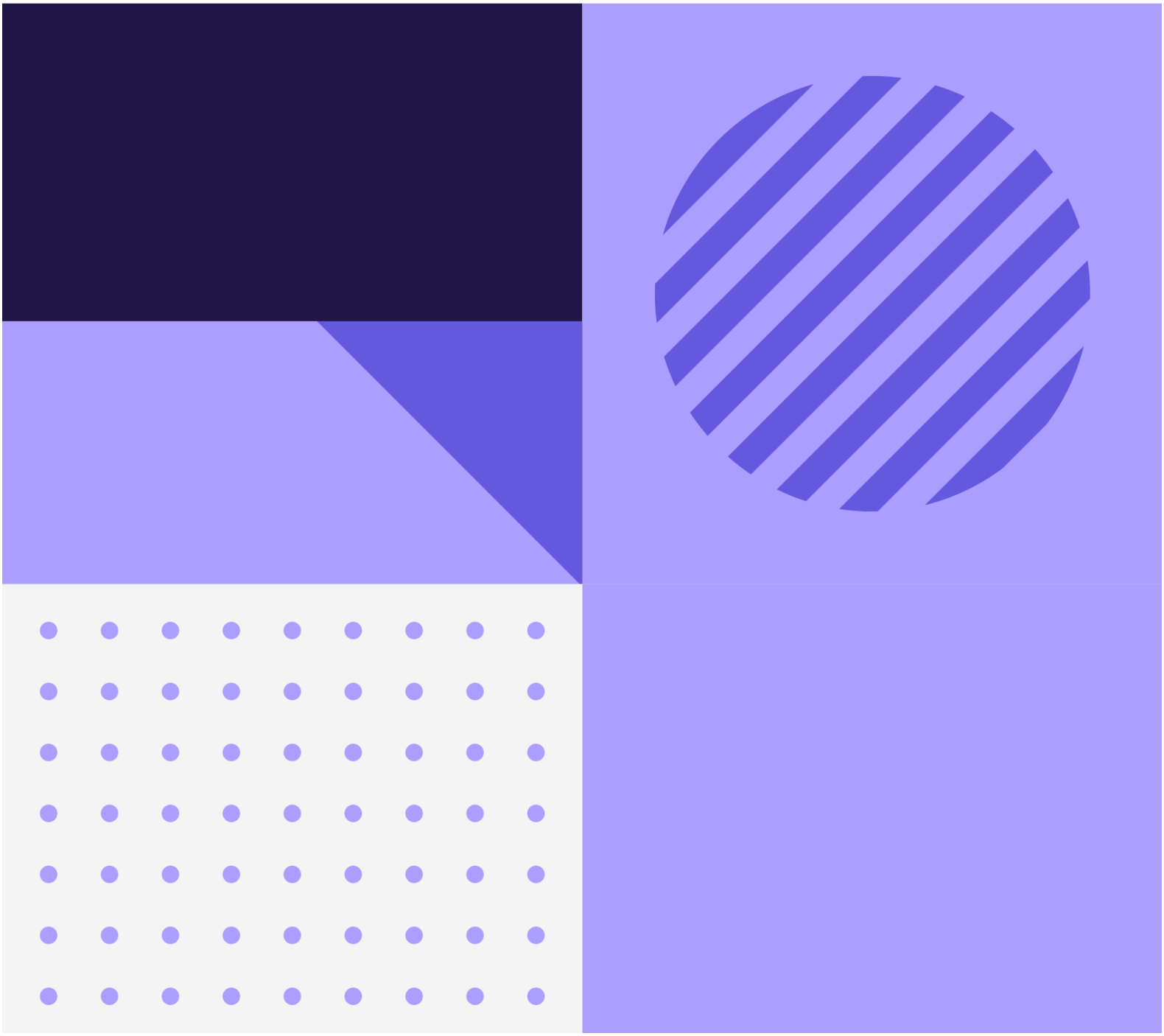


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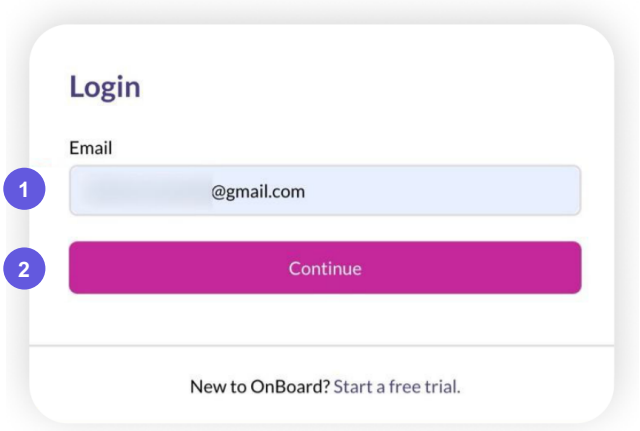
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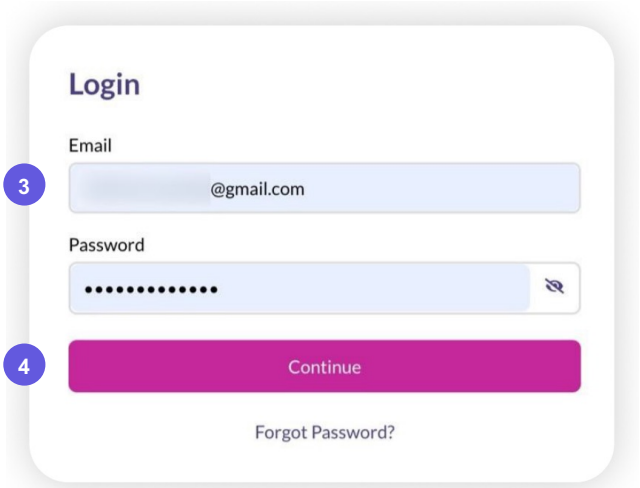
Logging In

Access from computer:
https://app.onboardmeetings.com

Access from mobile device:
Download the “OnBoard Meetings” application from your respective Mobile Store (Apple Store, Google Play Store, etc.)

1. Type in your OnBoard ID email address.
2. Click **Continue.**
3. Type in your password.
4. Click **Continue.**
(Select **Forgot your password?** to reset your password or unlock your account.)



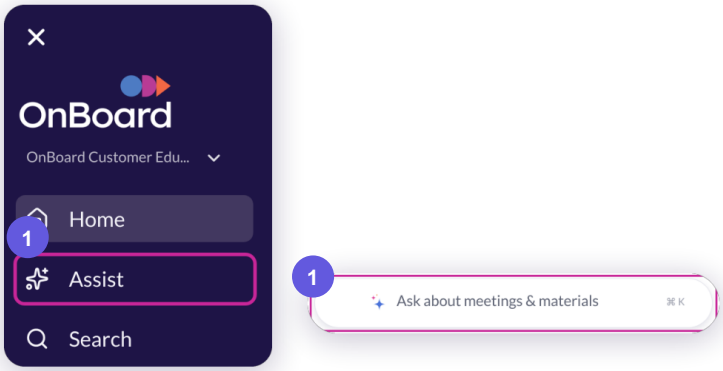


AI Assist

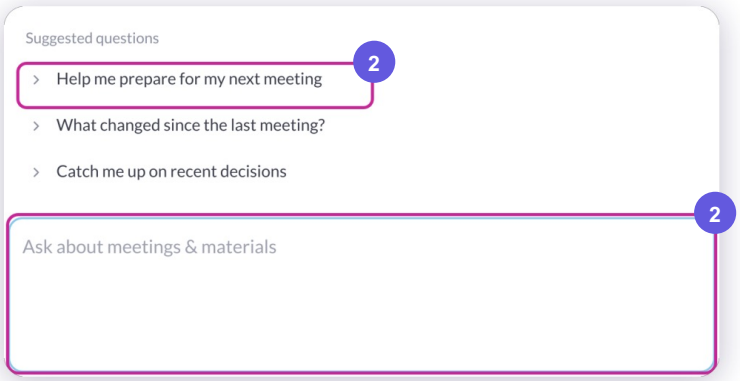
Use AI Assist to get answers about the meetings and agendas you can access.

1. Click **Assist** from the Navigation bar.

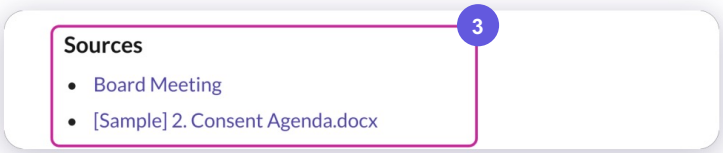
   Or prompt AI Assist bar on the Homepage.



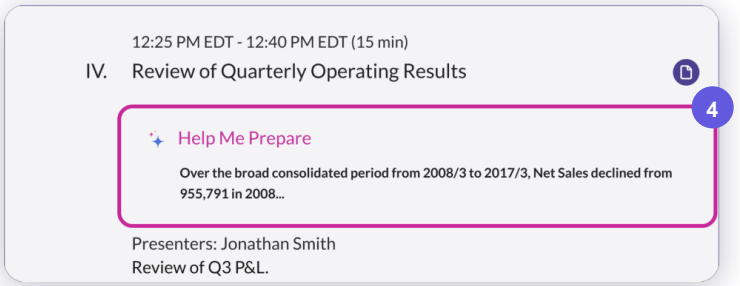
2. Ask any **question** about past or upcoming meetings and meeting materials.



3. Quickly access the source material to review information.



4. When viewing the meeting book, select **Help Me Prepare** on an agenda section to review a summary of that section.

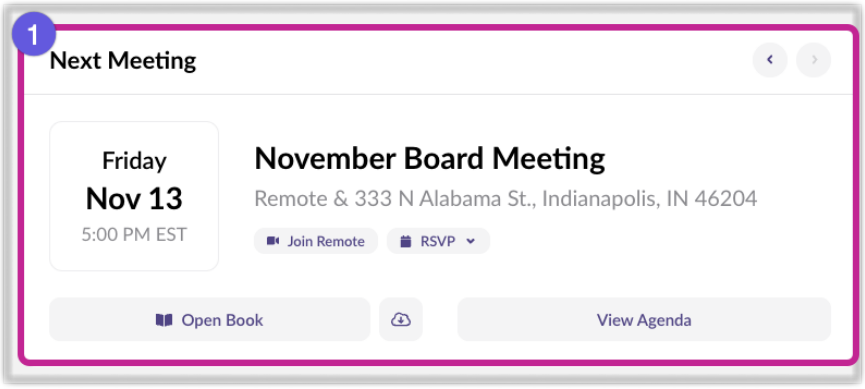


Try asking: “When is our next board meeting?”
“Who is presenting at the next Board Meeting?” “Give me a summary of the agenda for our next meeting.”

Note: AI Assist only shows meetings and details you have permission to view. If you do not see Assist, contact your OnBoard administrator.

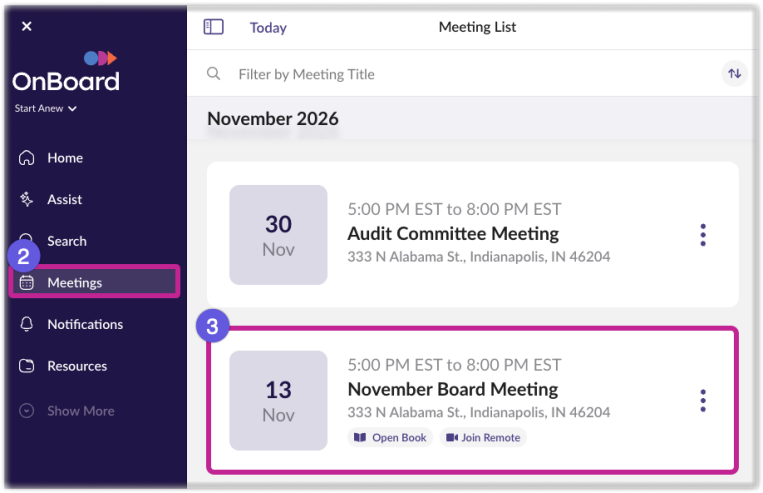
Accessing Meetings

1 Access your next upcoming meeting from the Homepage.

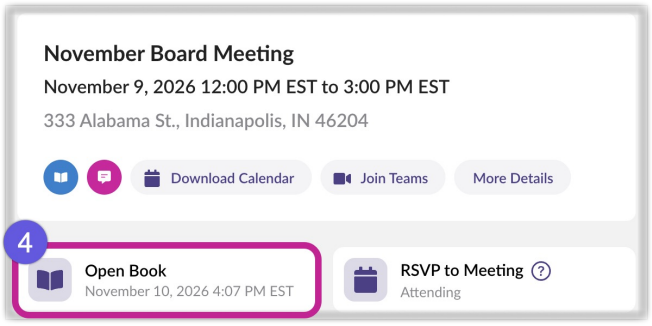


2 Select **Meetings** to view the full list of meetings.

3 Click a meeting in the list.



4 Click **Open Book** to view the meeting contents.



Making Private Annotations

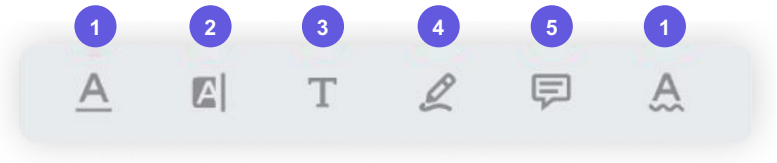
1 **Underline/Squiggly Underline:**
Underline text on the page.

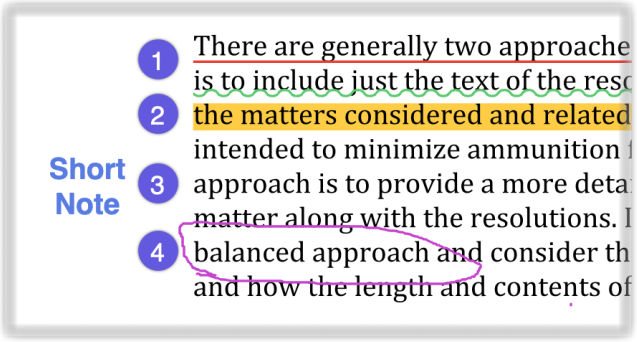
2 **Highlighter Tool:**
Highlight blocks of texts in many color options.

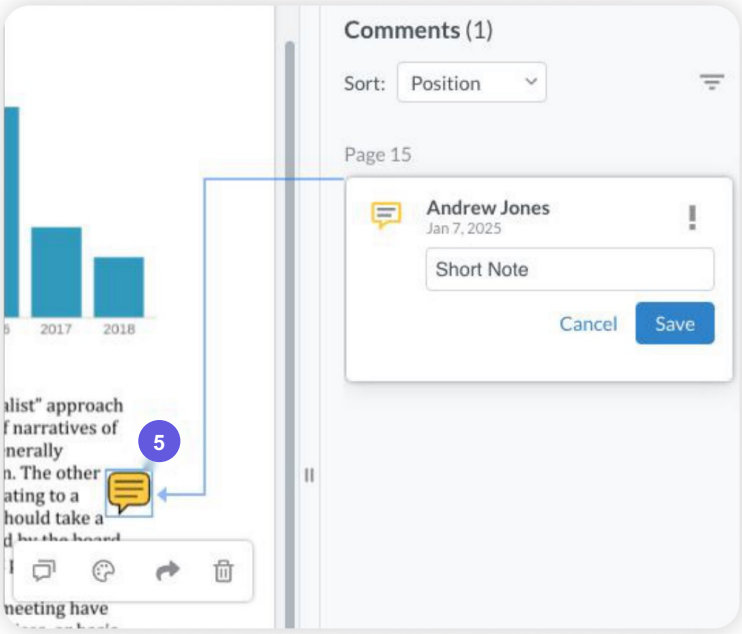
3 **Free-Text Block Tool:**
Click + Drag a text box and begin typing directly on the page.

4 **Free-Hand Pen Tool:**
Write or draw directly on the page.

5 **Sticky Note Tool:**
Drop a pin anywhere on your page and type reference notes to the side.





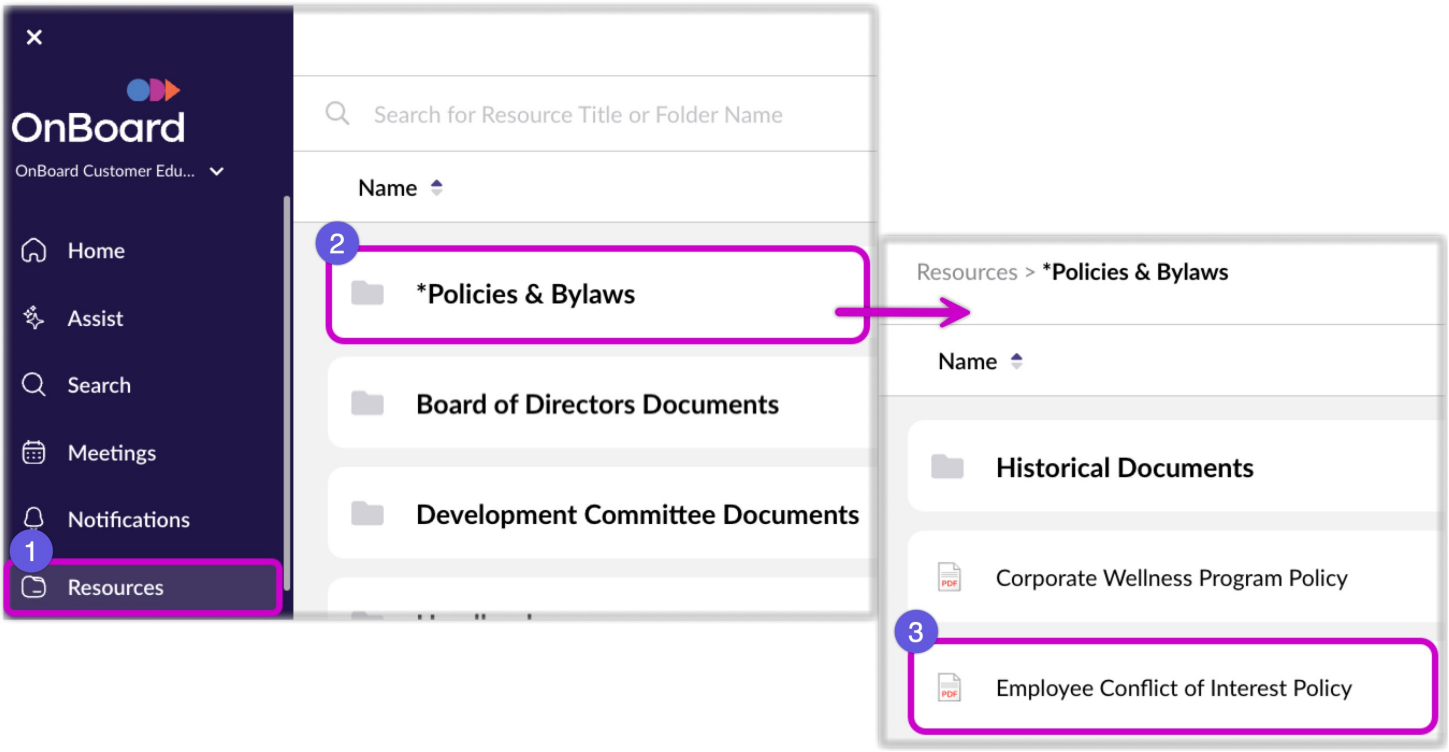


Accessing Resources

1. After logging into OnBoard, click **Resources** from the Navigation bar.

2. Click any **Resources** folder.

3. Click **Documents** to view.

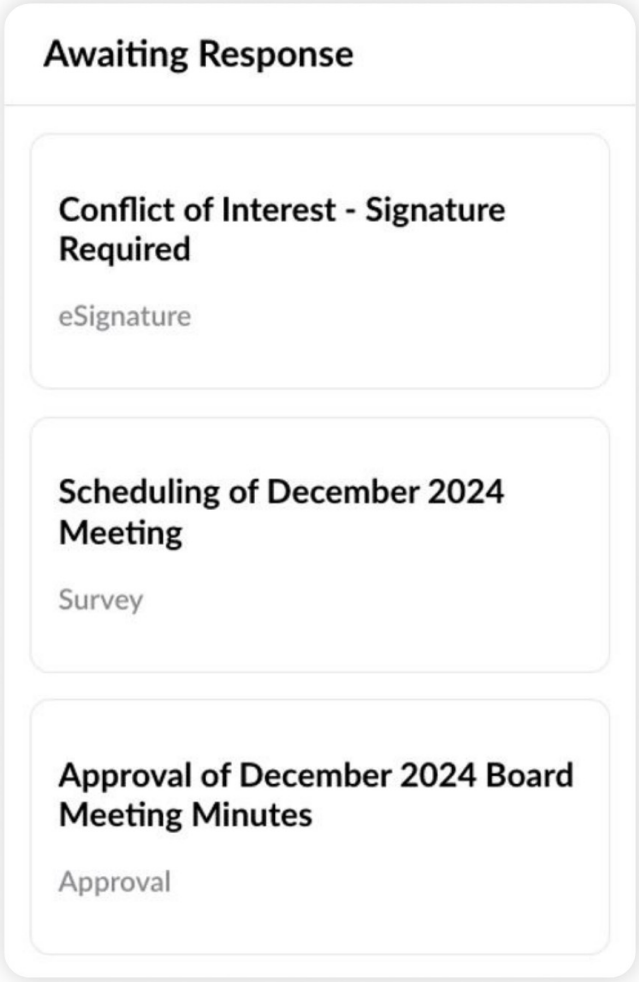


Actions Awaiting Response

1. Locate **Actions Response** on the Homepage.

2. Select an **Action** to view and complete it.

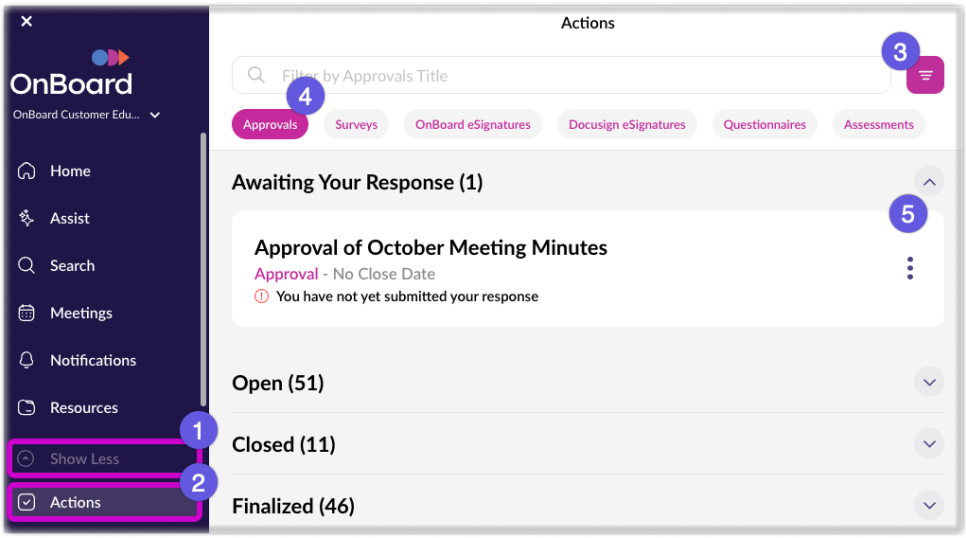
3. Once an Action is complete, it is removed from the list.

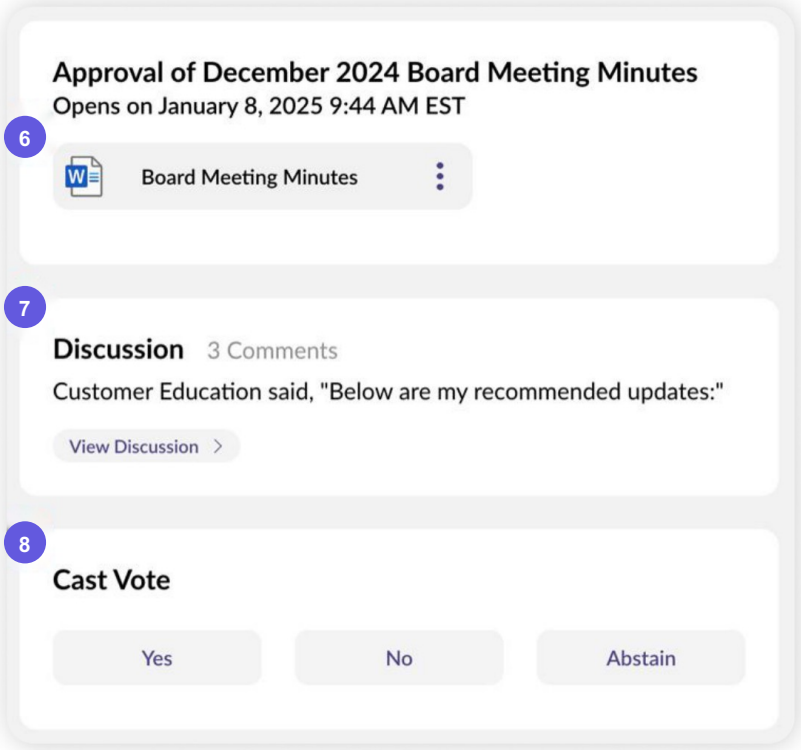


Approvals

View All and Vote

1. Select the **Show More/ Show Less** dropdown from the Navigation bar.
2. Click **Actions.**
3. Click **Filters** button.
4. Click **Approvals** button.
5. Select **Approvals** from the list.
6. Click **Document Name** to view related materials.
7. Click **View Discussion** to participate in the discussion.
8. Click **Yes/No/Abstain** to cast your vote.

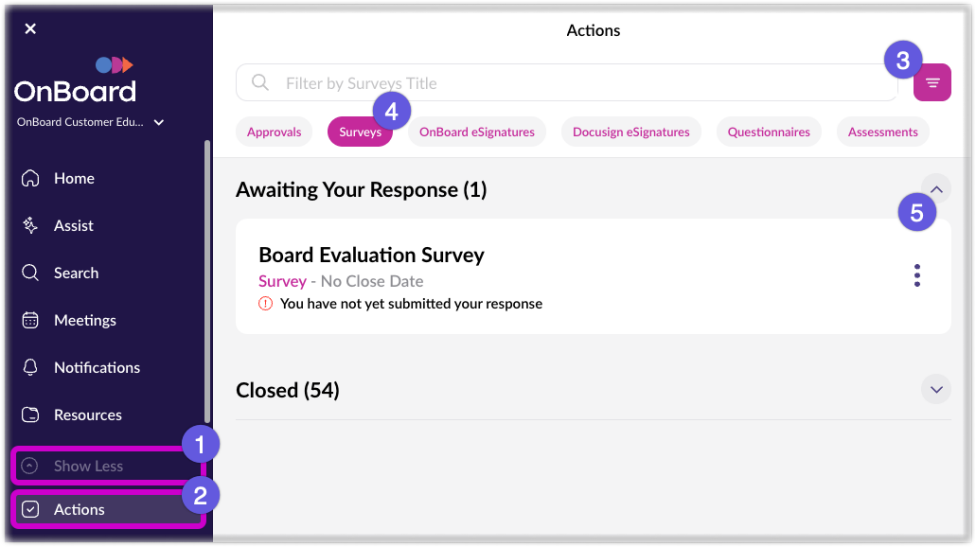


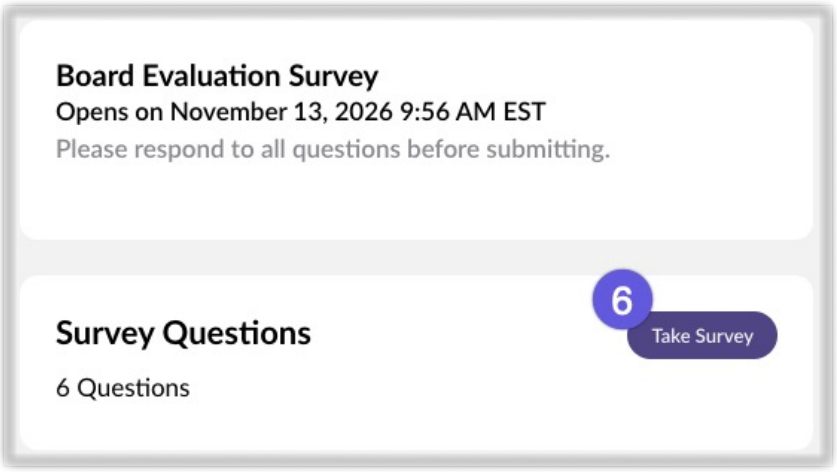


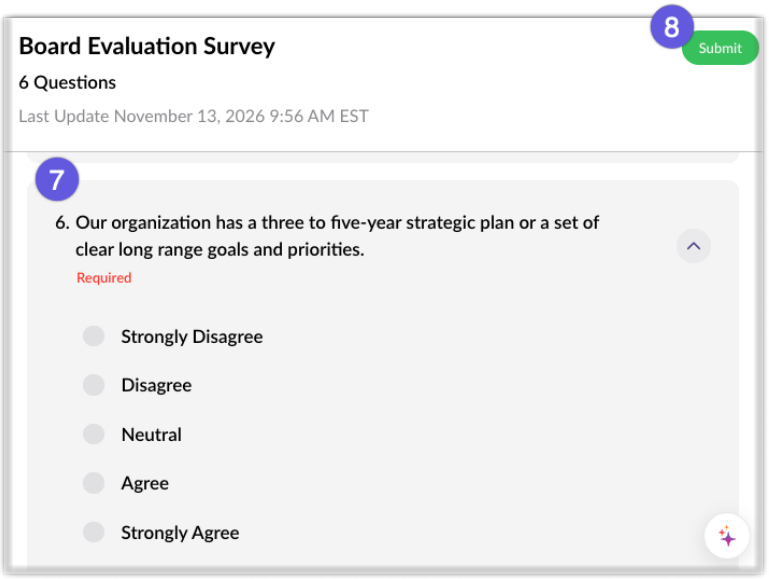
Surveys

View All and Vote

1. Select the **Show More/ Show Less** dropdown from the Navigation bar.
2. Click **Actions.**
3. Click **Filters** button.
4. Click **Surveys** button.
5. Select **Surveys** from the list.
6. Click **Take Survey** after viewing its details.
7. Answer Questions throughout the survey.
8. Submit when finished.



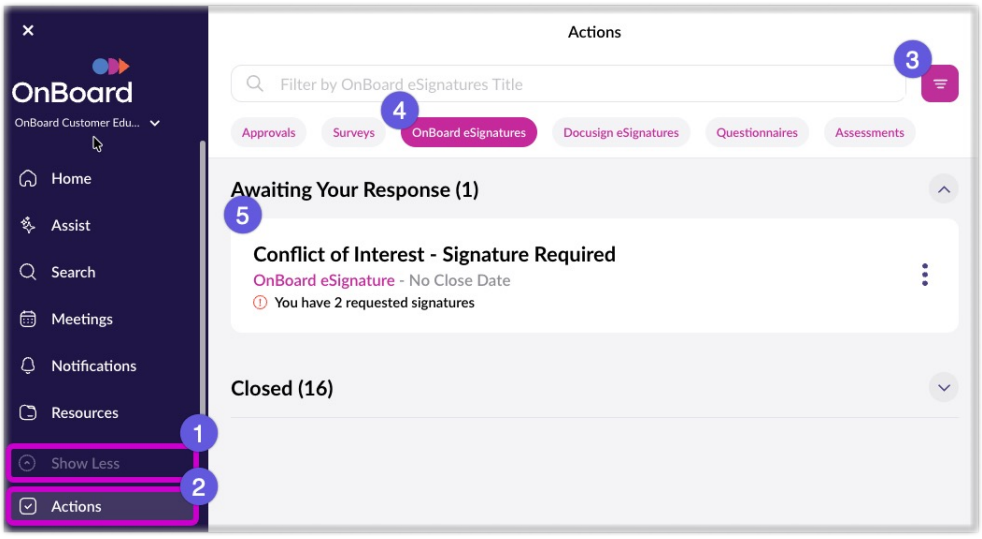




eSignatures

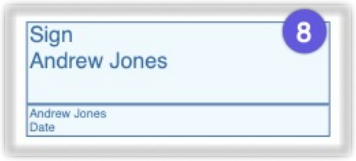
View All and Vote

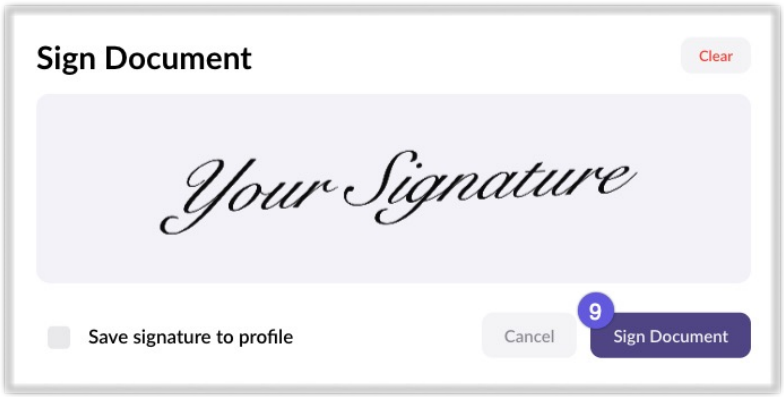
1. Select the **Show More/ Show Less** dropdown from the Navigation bar.
2. Click **Actions.**
3. Click **Filters** button.
4. Click **eSignatures** button.
5. Select **eSignatures** from the list.
6. Click **Sign Document.**
7. Click **Next** to easily locate each signature block.
8. Click/Tap the signature block.
9. Sign your name and click **Sign Document**.











Still have questions?

We’re here to help.



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