



END-USER

Quick Reference Guide

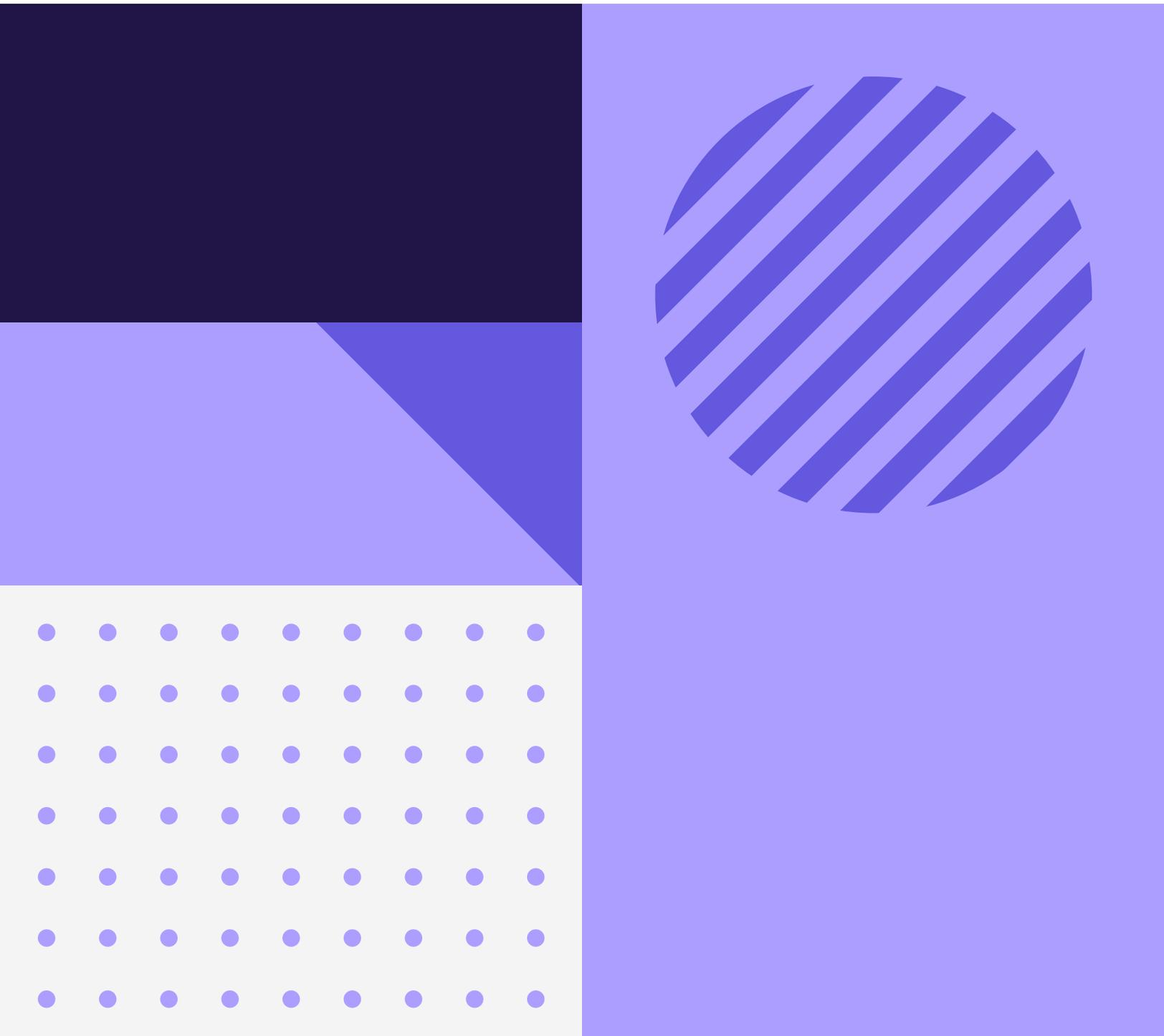


Table of Contents

Logging In	03
Accessing Meetings	04
Making Private Annotations	05
Accessing Resources	06
Actions Awaiting Response	07
Approvals	08
Surveys	09
eSignatures	10

Logging In

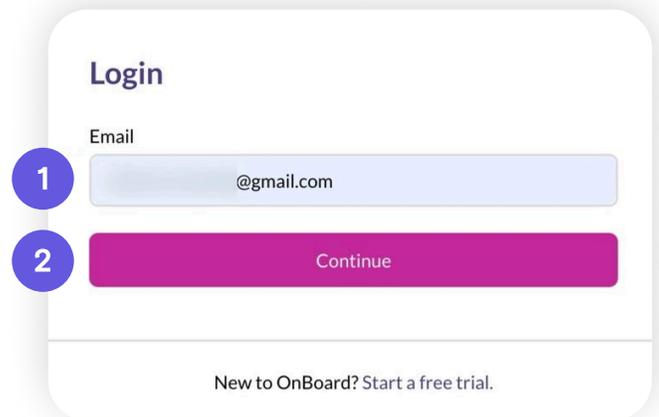
Access from computer:

<https://app.onboardmeetings.com>

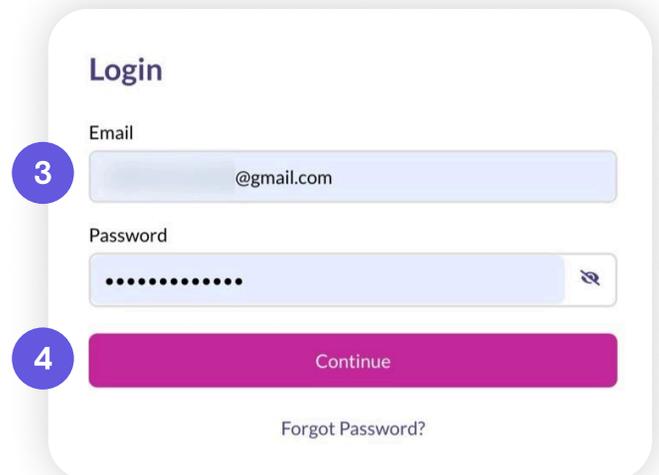
Access from mobile device:

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**.
(**Forgot your password?** Link can be used to reset your password or unlock your account.)



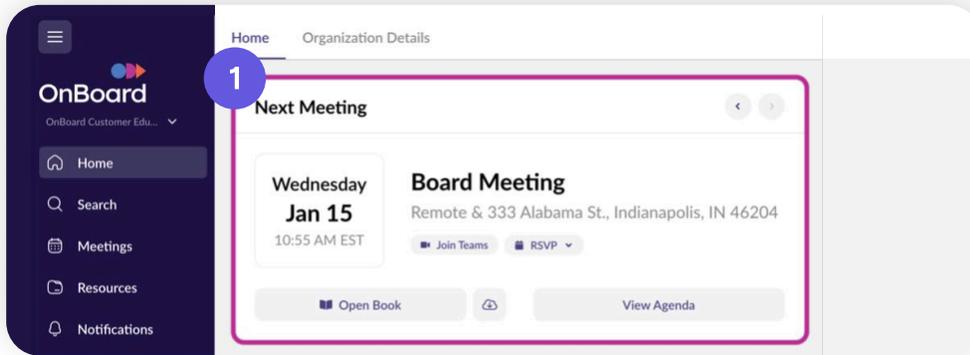
The screenshot shows the 'Login' screen. At the top, the word 'Login' is displayed. Below it is an 'Email' input field containing '@gmail.com'. A blue circle with the number '1' is positioned to the left of the input field. Below the input field is a purple 'Continue' button, with a blue circle containing the number '2' to its left. At the bottom of the screen, there is a link that says 'New to OnBoard? Start a free trial.'



The screenshot shows the 'Login' screen. At the top, the word 'Login' is displayed. Below it is an 'Email' input field containing '@gmail.com', with a blue circle containing the number '3' to its left. Below the email field is a 'Password' input field with a masked password (represented by dots) and a blue circle containing the number '4' to its left. Below the password field is a purple 'Continue' button. At the bottom of the screen, there is a link that says 'Forgot Password?'.

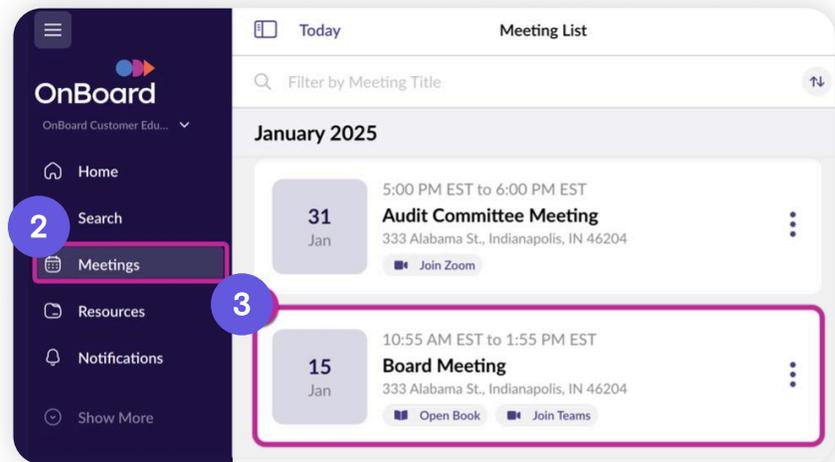
Accessing Meetings

- 1 Access your next upcoming meeting from the Homepage.

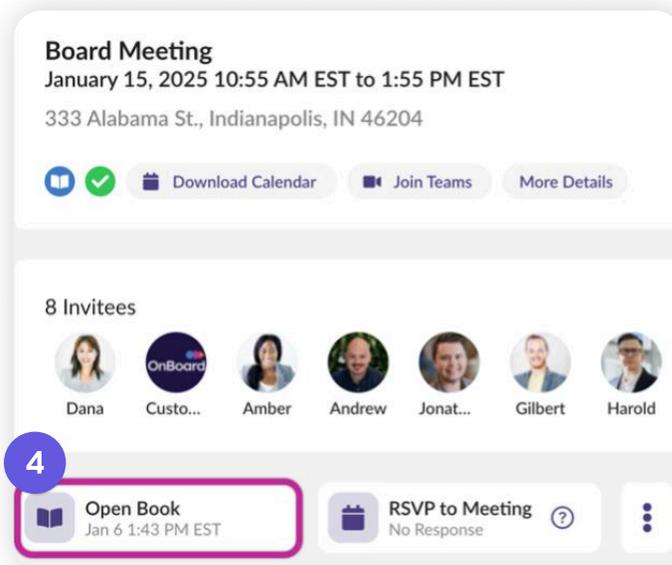


- 2 Select **Meetings** to view the full list of meetings.

- 3 Click a meeting in the list.

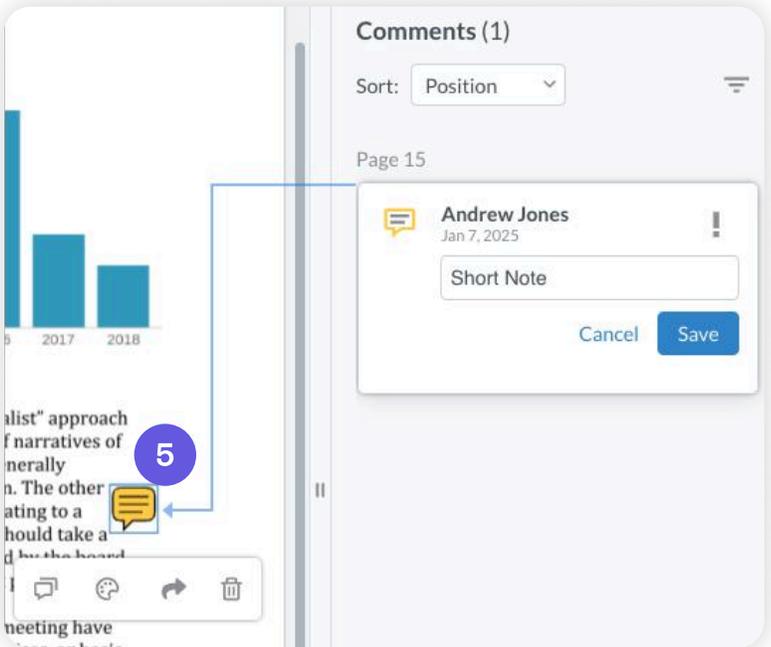
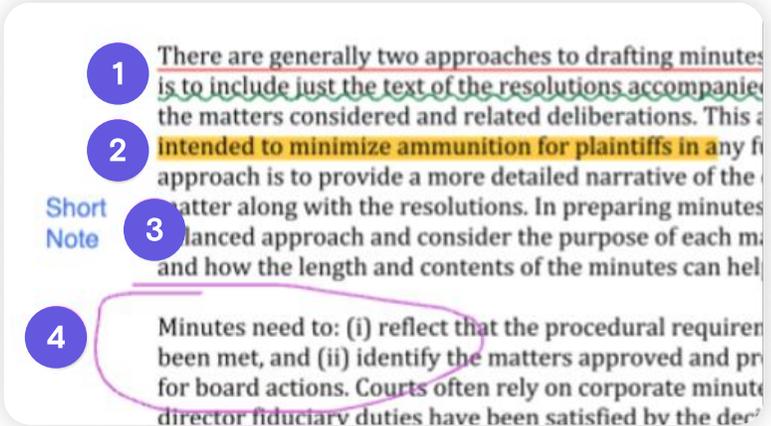


- 4 Click **Open Book** to view the meeting contents.



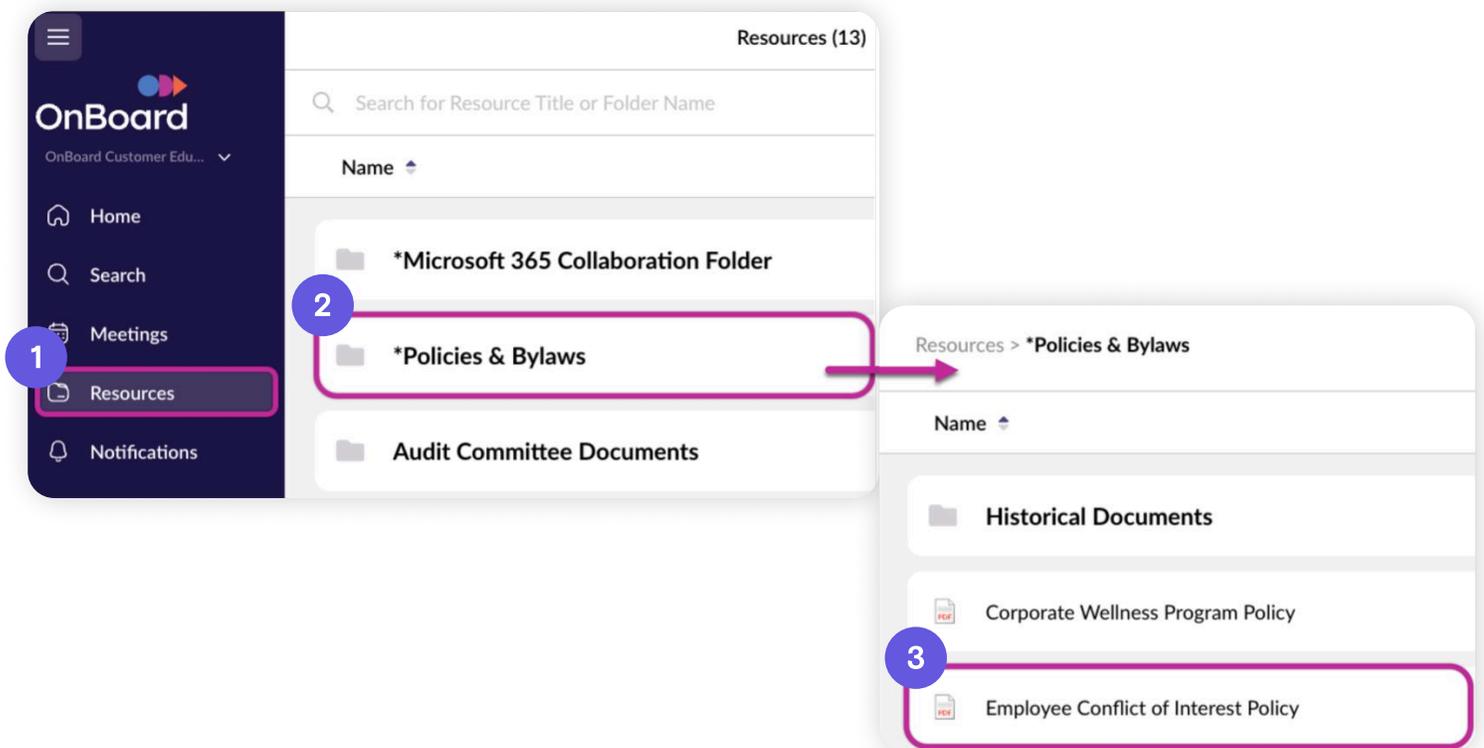
Making Private Annotations

- 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.

Awaiting Response

Conflict of Interest - Signature Required
eSignature

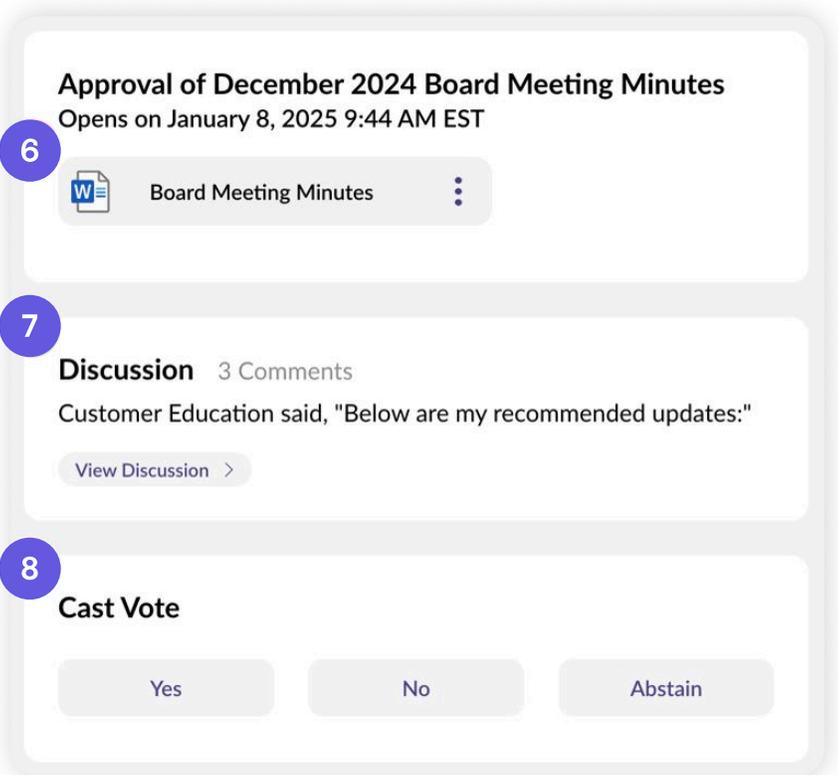
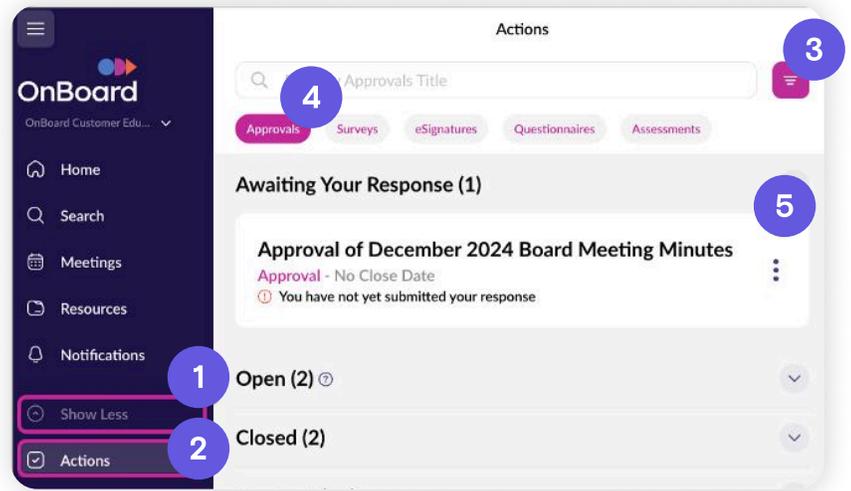
Scheduling of December 2024 Meeting
Survey

Approval of December 2024 Board Meeting Minutes
Approval

Approvals

View All and Vote

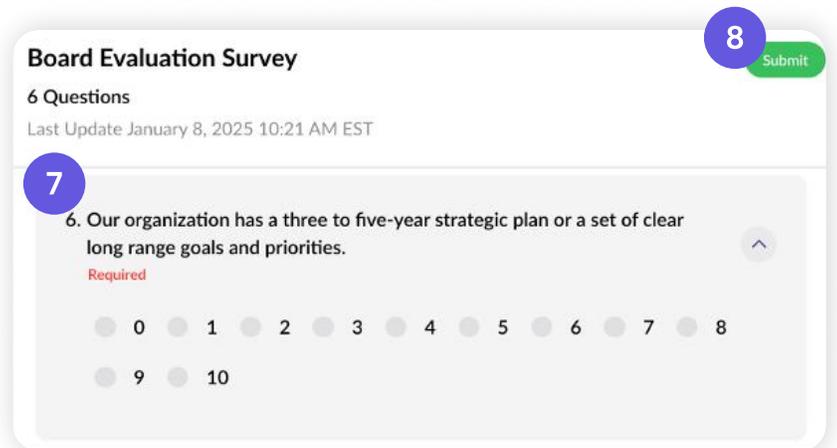
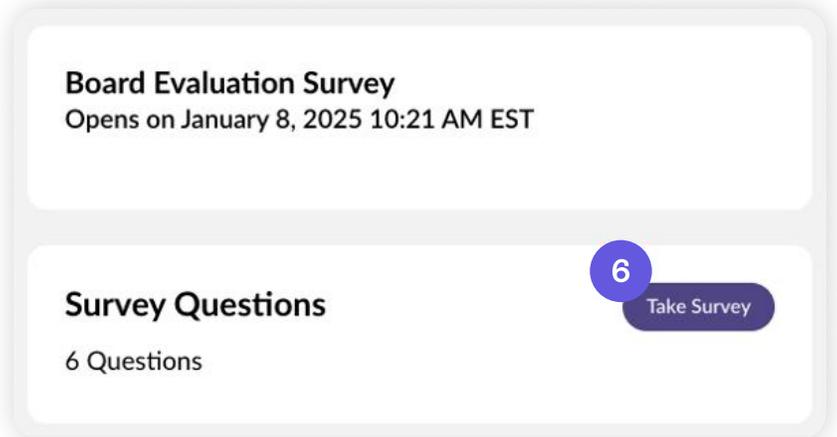
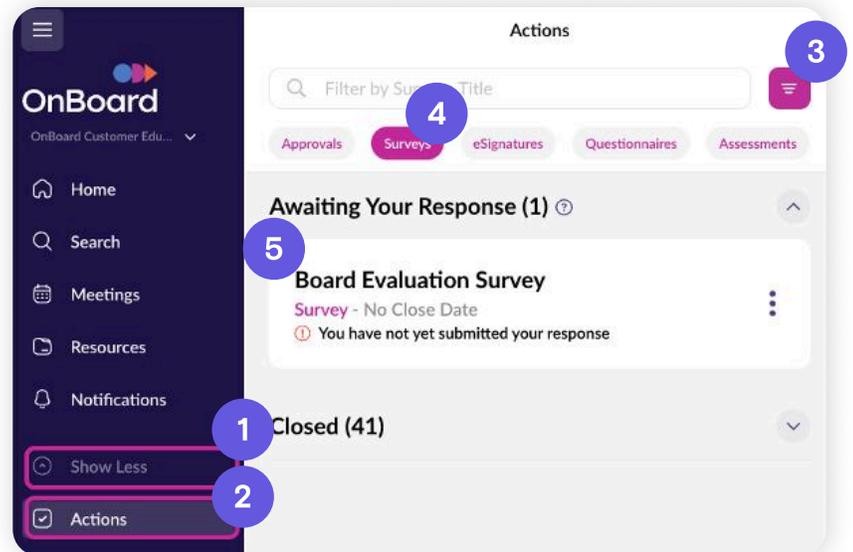
- 1 Select the **Show More/Show Less** dropdown from the Navigation bar.
- 2 Click **Actions**.
- 3 Click **Filters** button.
- 4 Click **Approvals** button.
- 5 Select **Approvals** from the list.
- 6 Click **Document Name** to view related materials.
- 7 Click **Comments** area to participate in Discussion.
- 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**.

The image displays a sequence of six screenshots from the OnBoard application, illustrating the eSignature process. The first screenshot shows the navigation bar with 'Show Less' and 'Actions' highlighted, and the 'eSignatures' filter selected in the top right. The second screenshot shows a list of documents, with 'Conflict of Interest - Signature Required' selected. The third screenshot shows the 'Sign Document' screen with a 'Sign Document' button. The fourth screenshot shows a '1 Signature request remaining in document' notification with a 'Next' button. The fifth screenshot shows a signature block for 'Andrew Jones' with a 'Sign' button. The sixth screenshot shows the 'Sign Document' screen with a large 'YOUR SIGNATURE' text and a 'Sign Document' button.

Still have questions?

We're here to help.



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