OnBoard

END–USER

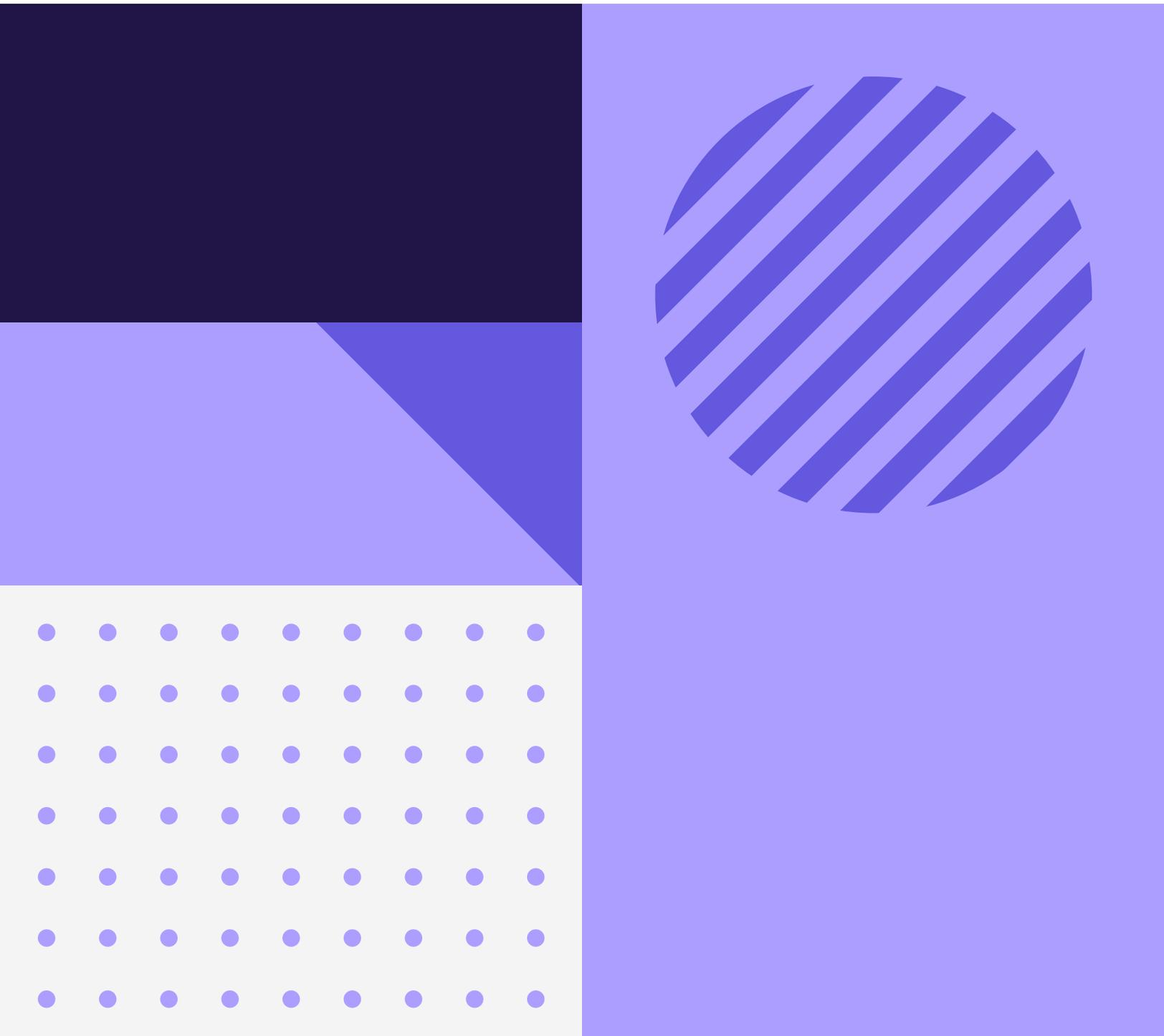# Quick Reference Guide

Table of Contents
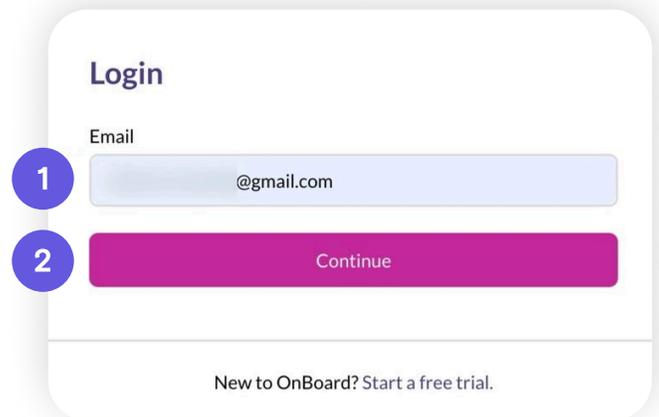
Logging In

**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
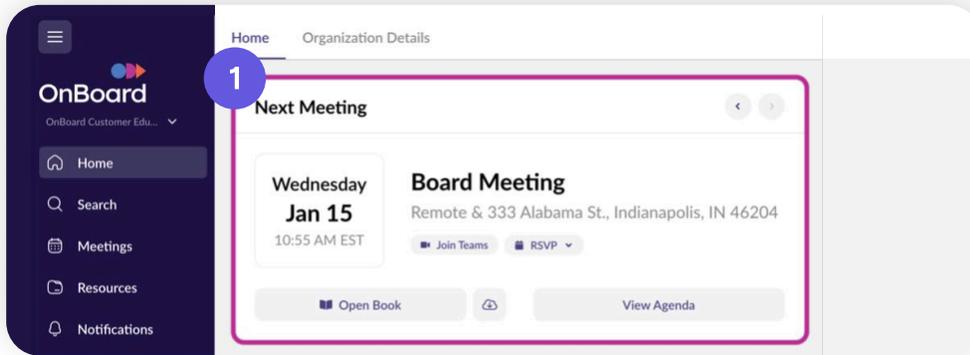used to reset your password or unlock
your account.)

Login

Email

1 @gmail.com

2 Continue

New to OnBoard? Start a free trial.
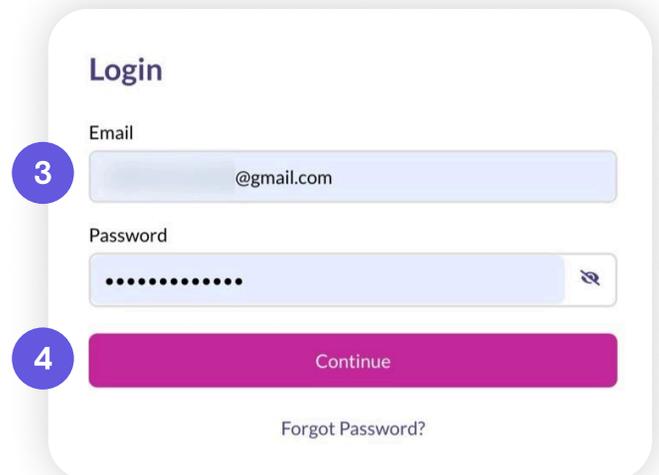
Login

Email

3 @gmail.com

Password

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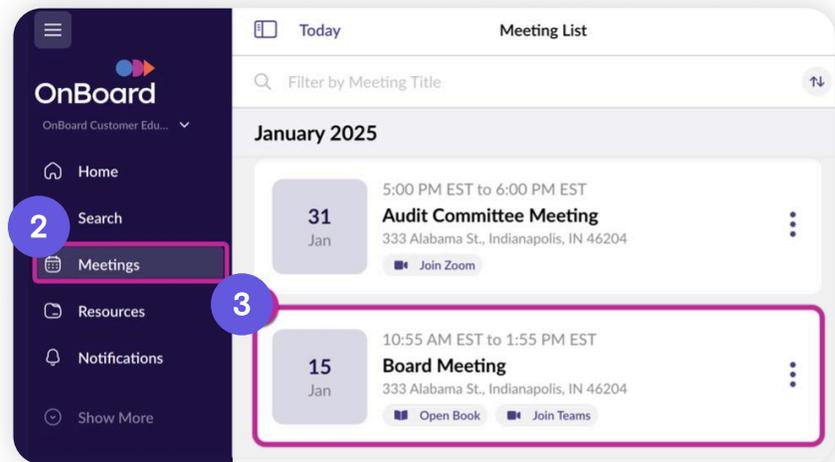
4 Continue

Forgot Password?

Accessing Meetings

1 Access your next upcoming meeting from the Homepage.
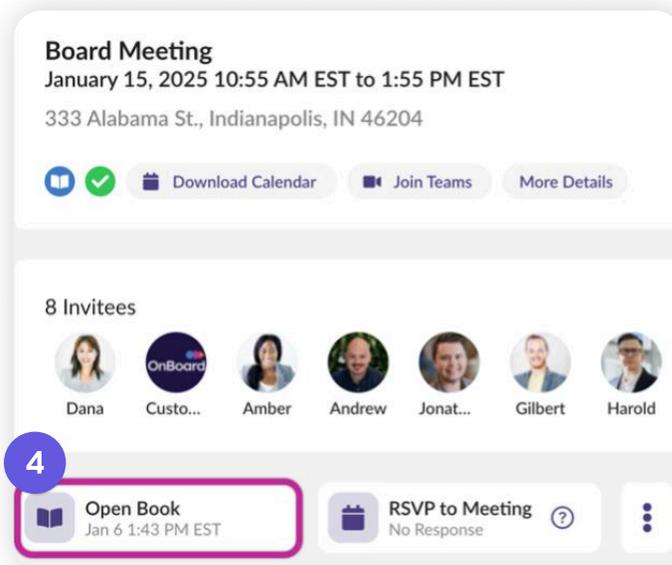

2 Select **Meetings** to view the full list of meetings.

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 **Highligher 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.
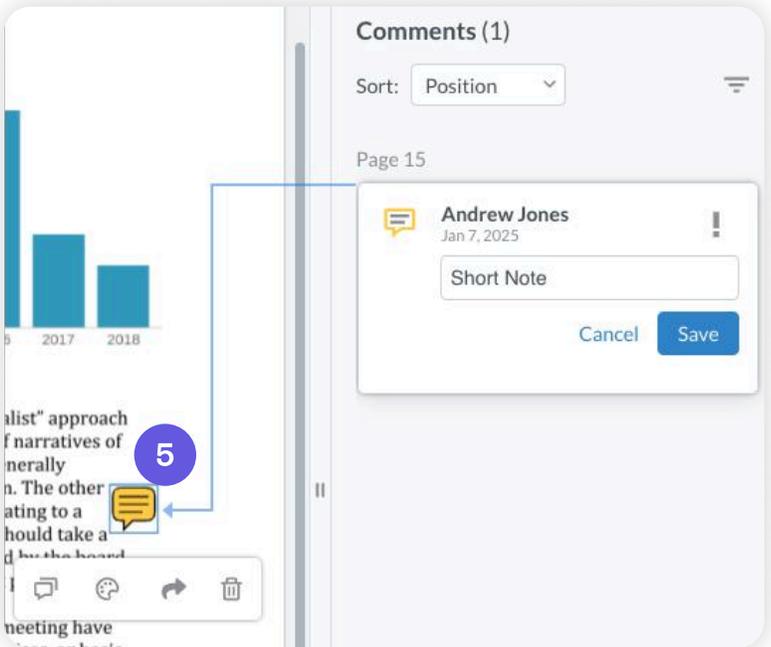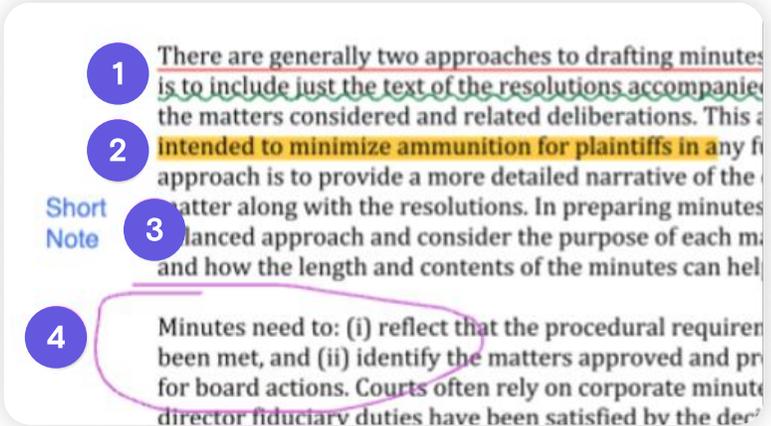
Accessing Resources

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

2   Click any **Resources** folder.

3   Click **Documents** to view.
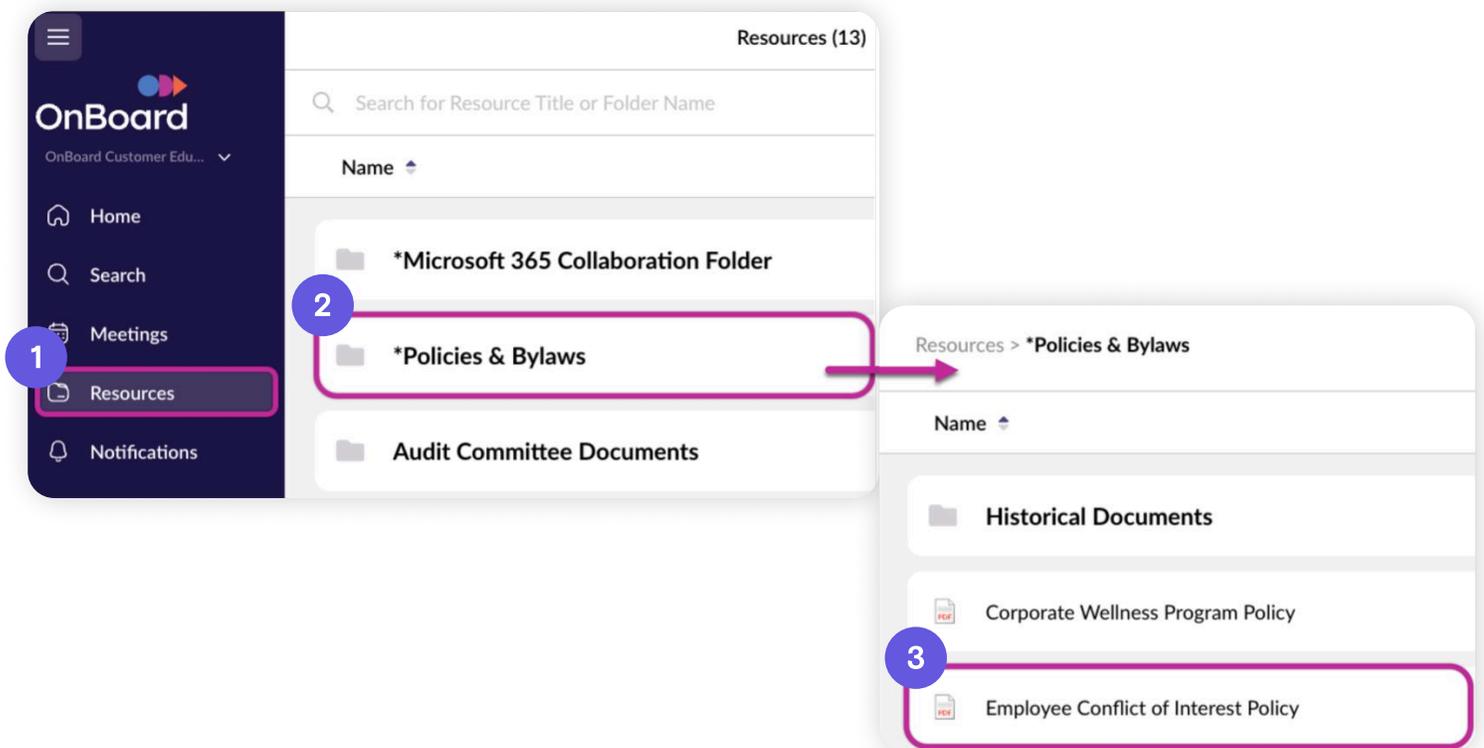
Actions Awaiting Response

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

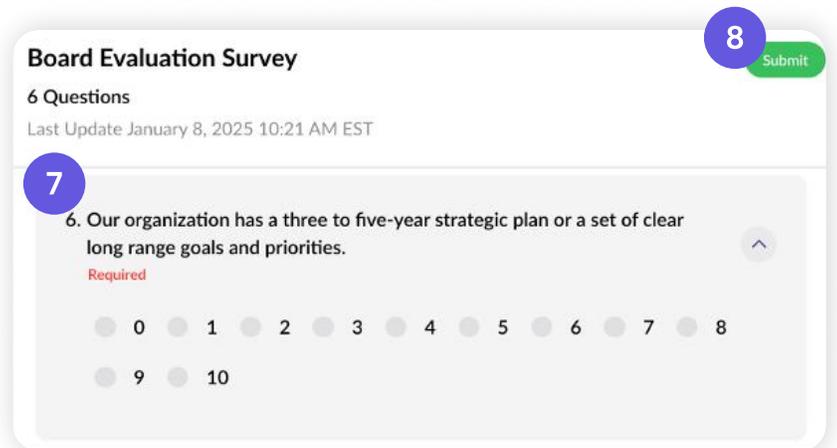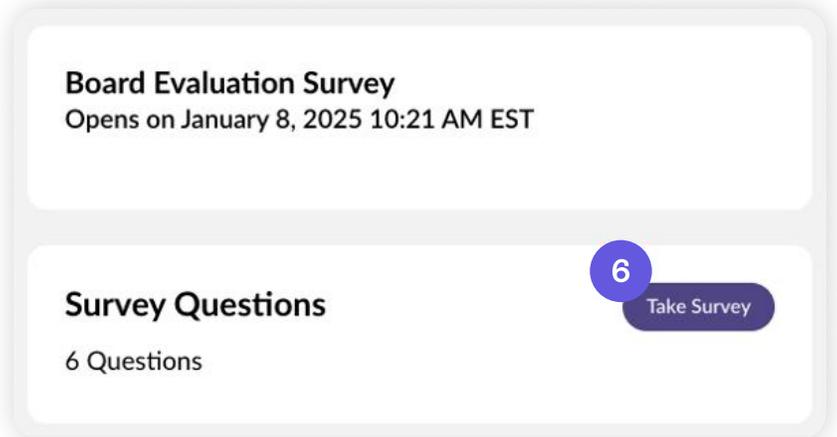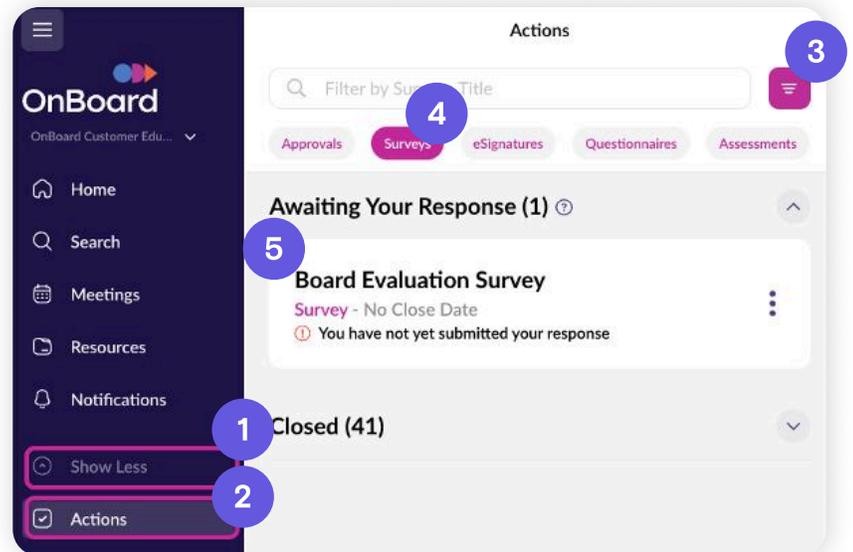Approval

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.
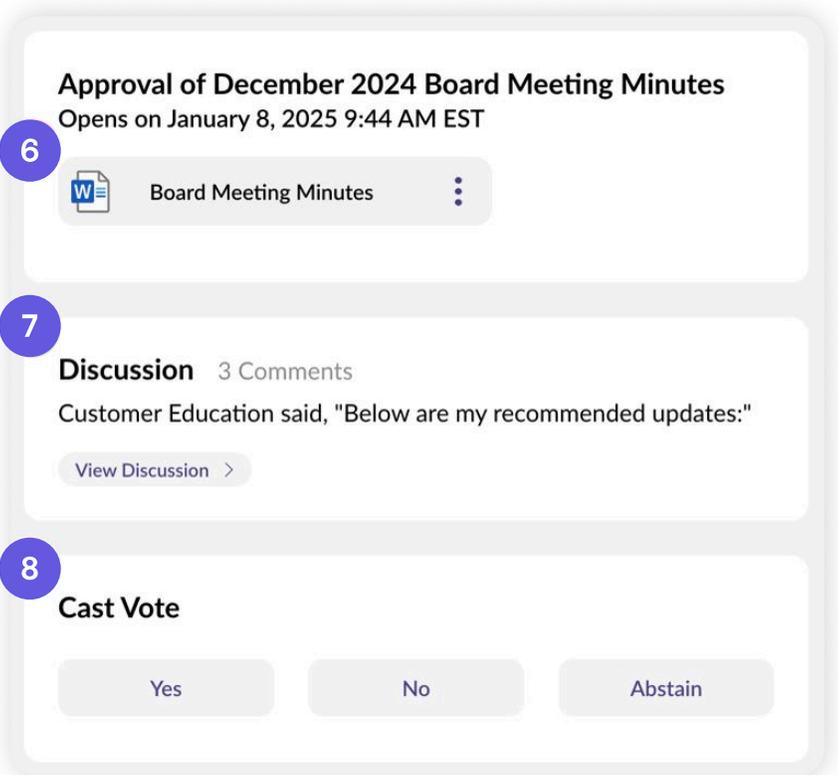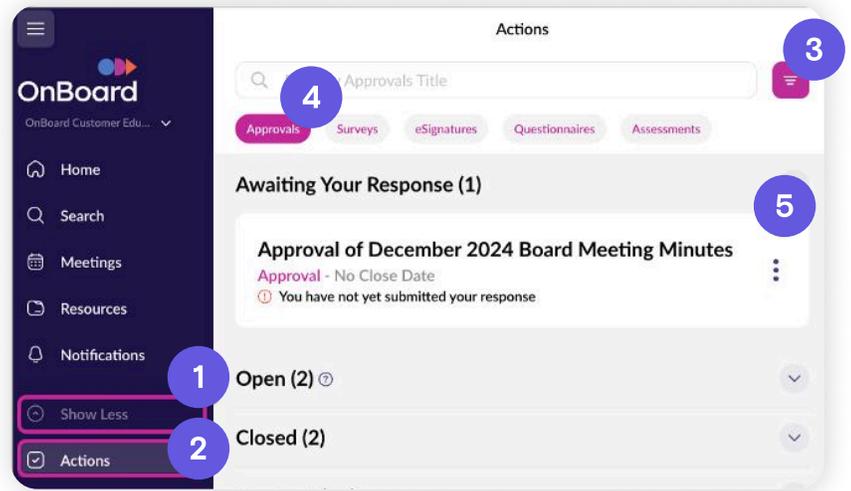
Surveys

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**.

Still have questions?

We're here to help.