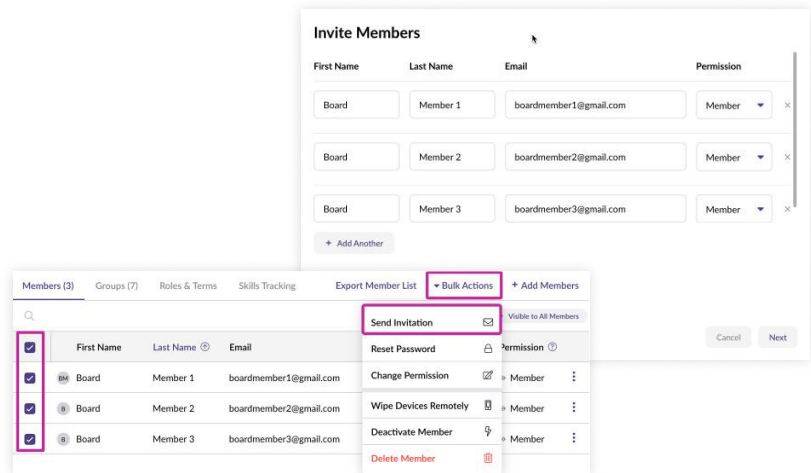


Preparing for Board Training

1 Send Invitations

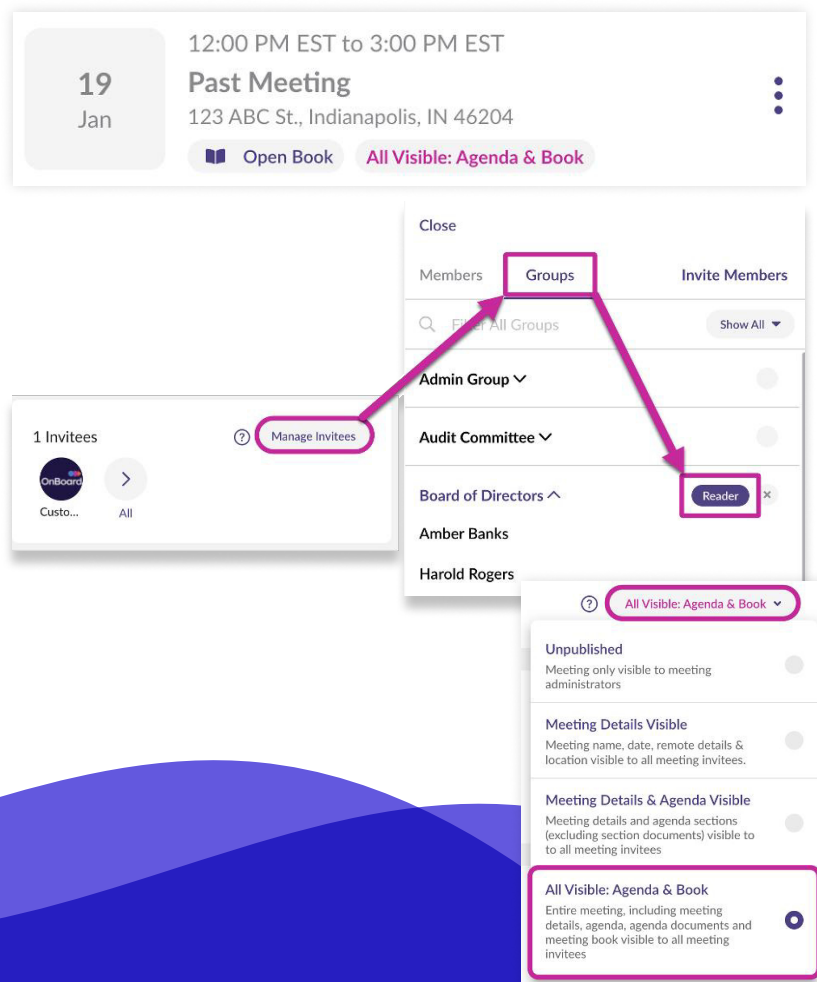
Send Invitations: Ensure all users are added to the Directory as Members and have received and accepted their invitations.



2 Set Up a Demo Meeting

Use a familiar past meeting to help Members focus on learning the platform.

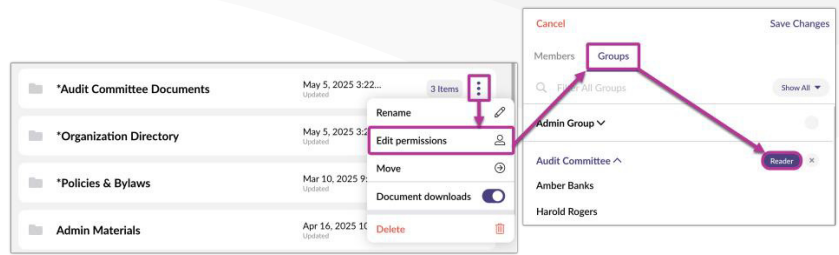
- **Create Meeting:** Recreate your last meeting with the meeting's Agenda & Documents
- **Permissions:** Add all Invitees as Readers
- **Visibility:** Set to All Visible: Agenda & Book



3 Prep the Resources Section

Populate Resources with relevant documents for your organization.

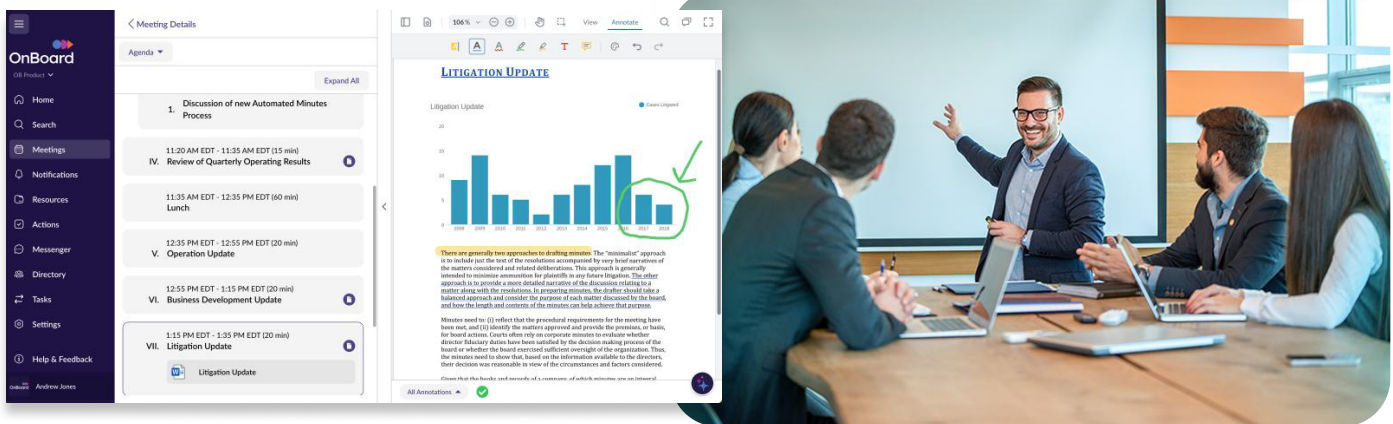
- **Create Folders & Add Documents**
- **Permissions:** Add Members to relevant folders as Readers



4 Sample Training Agenda

Below is a sample training agenda. [Watch training videos](#) to see a typical training outline.

1. Login Process
2. Accessing the Homepage
3. Navigating the Meeting List
4. RSVPing and Viewing the Agenda
5. Using the Open Book View for the Meeting Book
6. Creating (and Sharing) Annotations
7. Accessing and Navigating Resources
8. Viewing Directory and Updating Profile Information
9. Accessing OnBoard Help & Support and Admin Support Contact Info



Pro Tips:



Create a Demo Member Account

Use a separate email to create a Member account to simulate what your Members view.



Know the Mobile Apps

If your organization primarily utilizes the mobile apps, train on those devices.