

Admin Getting Started Guide

OnBoard makes meetings smarter, easier, and more secure—so your board can focus on decisions that matter. This guide gives you the essentials to get set up fast and start driving better outcomes right away.

1 Manage Members

- Add Members**
Add your board and committee members to the Directory (you can hold off on sending invites until setup is complete).
- Manage Permissions**
Decide which members should be Admins or Creators.
- Create Groups**
Organize members into groups for your board and committees to keep everything structured.



2 Review Settings

- General Settings**
Decide if members can download documents.
- Security Settings**
Enable two-factor authentication or app security.
- Feature Settings**
Manage the settings for the features used throughout your organization.

3 Populate Your Resource Library

- OnBoard's Resource Library is your unlimited storage hub for all your organization's key information.
- Organize with Folders**
Create folders for board and committee documents.
 - Drag and Drop**
Upload documents directly into the folders.
 - Manage Permissions**
Ensure the right people have access to the right materials.



4 Create a Meeting

- Quickly create your agenda, build your meeting book, and manage who has access – and when!
- Manage Invitees**
Choose members and set their permissions.
 - Create the Agenda & Meeting Book**
Assemble everything into a single, easy-to-navigate meeting book.
 - Publish**
Share the meeting at the right time so invitees can begin preparing.

5 Customize Homepage

- Make your Homepage a helpful starting point for members.
- Organization Details**
Update organization's logo, organization profile info, and board leadership.
 - Homepage Panels**
Decide what content is displayed on the homepage and its location.
 - Add Announcements**
Share important updates and keep everyone connected.



6 Invite Members

Once Resources, Meetings, and the Homepage are ready, you're set to invite members. From there, they can log in, access materials, and begin streamlining their preparation for effective board governance.