OnBoard

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 or share annotations.

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, firmographic information, 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.

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Call OnBoard's 24/7 Support line (Option 1) to speak with an available Specialist.
+1 765.535.1880 or email help@onboardmeetings.com