

ADMIN

Quick Reference Guide



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Master Permission Chart

	Organization	Group	Actions (Approvals/Surveys/eSignatures)
Member	Read-only access to the organization.	Read-only access to group details.	N/A
Administrator	Create Meetings, Groups, Resources, Actions. Can edit/invite Users. Can change Organization Settings.	Able to edit group details and group member list.	Unable to participate in action, but has full edit permissions.
Creator	Create Meetings, Groups, Resources and Actions.	N/A	N/A
Exclude	N/A	N/A	Complete removal of access to the Action. Overrides all other access.
Voter/Respondent/Signer	N/A	N/A	The user can participate in the Action.
Admin & Voter/Respondent/Signer	N/A	N/A	The user can participate in the Action and has full edit permissions to the Action.
	Meeting	Agenda Section	Resources
Member	N/A	N/A	N/A
Administrator	Can edit meeting details, member access, agenda, and book documents.	Can edit agenda section details and section permissions.	Can upload new resources, create/rename resource folders, move resources between folders, control user access to folders.
Reader	Read-only access to meeting details, agenda, and book.	Read-only access to this section of the agenda and board book.	Read-only access to folders and documents within this folder.
Contributor	Can upload documents to any agenda section.	Able to upload a document to this agenda section.	N/A
Exclude	Complete removal of access to this meeting. Overrides all other access.	Complete removal of access to this agenda section. Overrides all other access.	Complete removal of access to this resource folder or document. Overrides all other access.

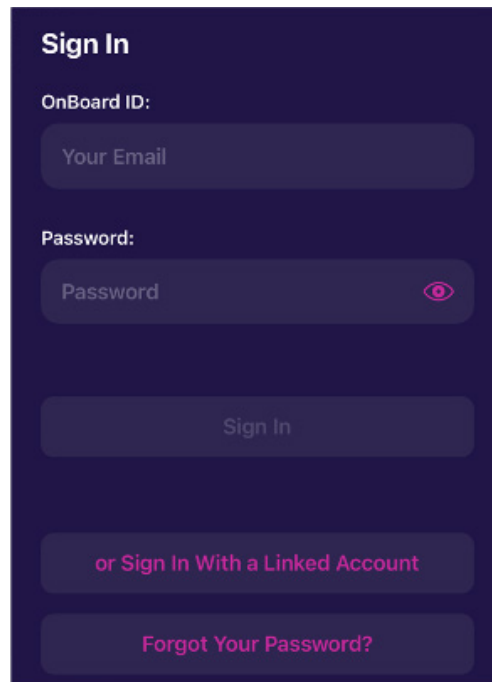


Resetting User Passwords/ Unlocking User Accounts

Method 1:

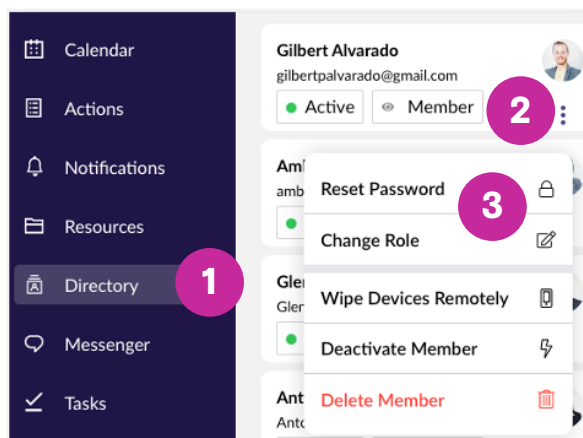
End users can resolve this on their own from the login screen. Click **Forgot your Password** to unlock your own account and reset your own password.

(Available to all users)



Method 2:

As an administrator, navigate to the Directory. Click on the 3-dot button along the right side of the page for the user in question, then select Reset Password.



Admin FAQs and Quick Tips

User unable to see the meeting?

- Check their permissions to that meeting. They may not have been given access.
- Check the meetings Visibility Status. Readers cannot see a meeting that has not been made All Visible.

Need to block access to a feature?

- Navigate to Dashboard > Org info. Some features, such as Messenger, Shared Annotations, and Document Downloads can be disabled for specific users.

Need to send a reminder notification about your upcoming meeting?

- You'll have the option to trigger a notification when the meeting's visibility status is changed, but a reminder can be sent at any time without needing to make changes to the visibility. Just use the Remind button located at the top of the meetings page, to the left of the visibility status.

Which document types can be added to a meeting section?

- PDFs, Word, Excel, PowerPoint.
(Note: Images cannot be uploaded directly to a section, but it can be embedded into a Word/PDF doc first, then uploaded.)



**Still have questions?
We're here to help.**



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