



End User Guide

Features and Capabilities

Created by Jenni Washington, MBA

Manager, Digital Customer Experience | OnBoard



Transforming meetings



Multi device and browser compatible



Shared notes and annotations for content review



Unlimited repository for minutes and documents



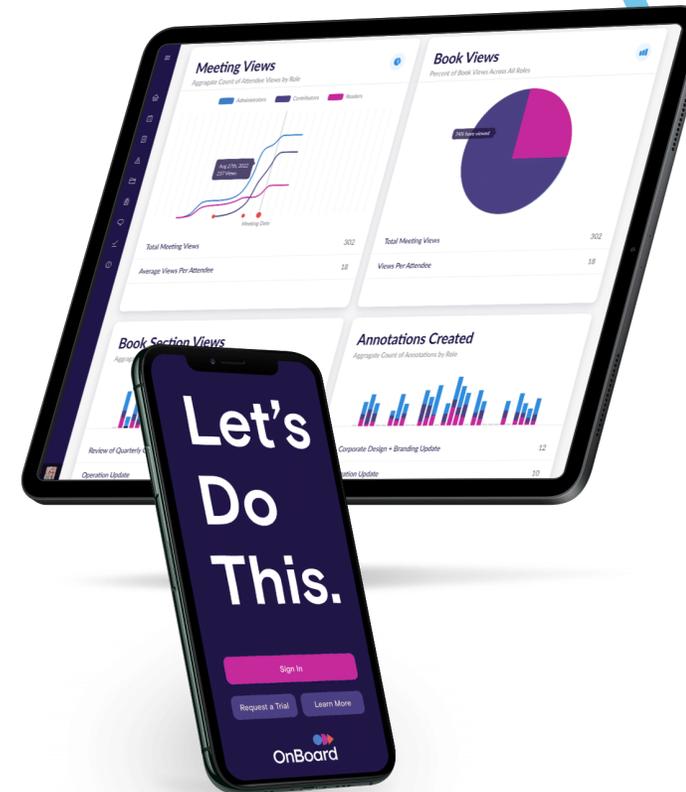
In-app messenger for boards and internal teams



Built-in eSignatures, votes, and surveys



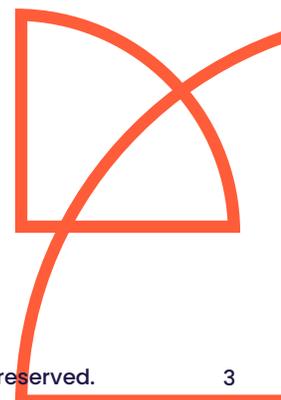
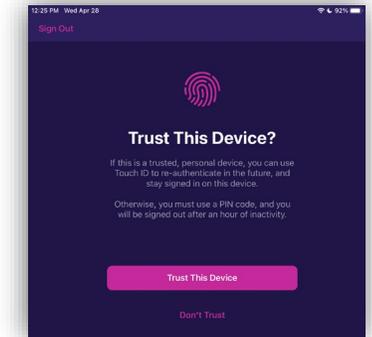
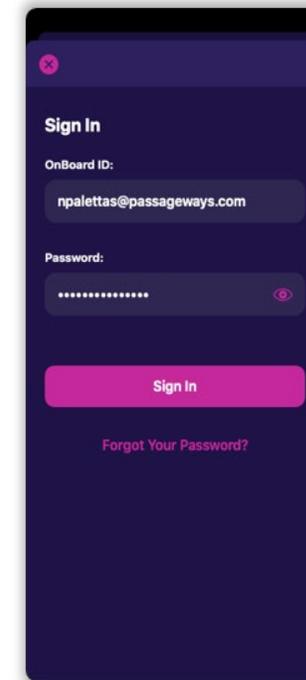
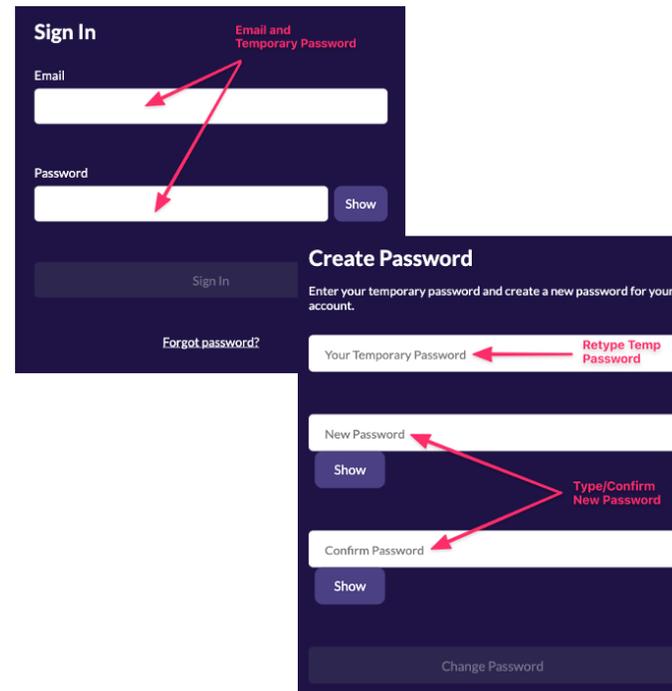
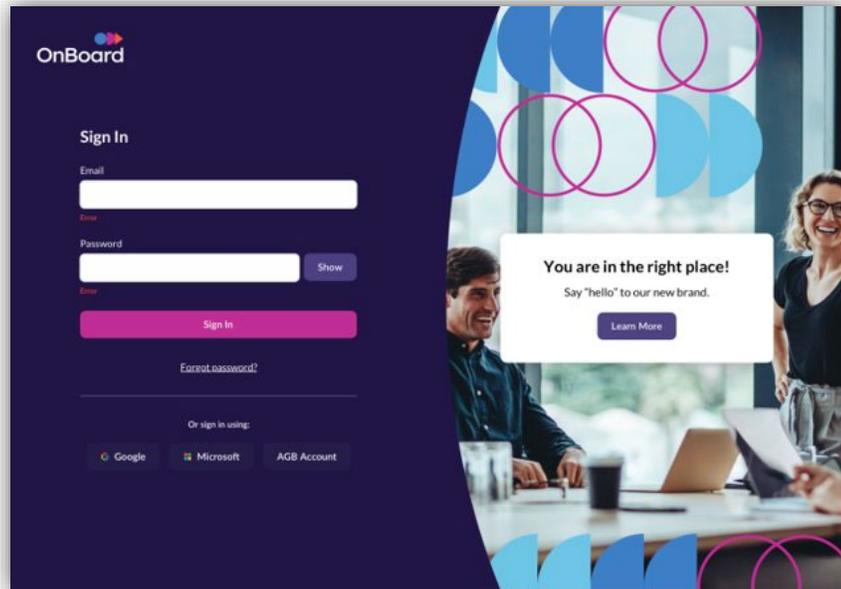
Task management and smart notifications



Navigating OnBoard | Logging In

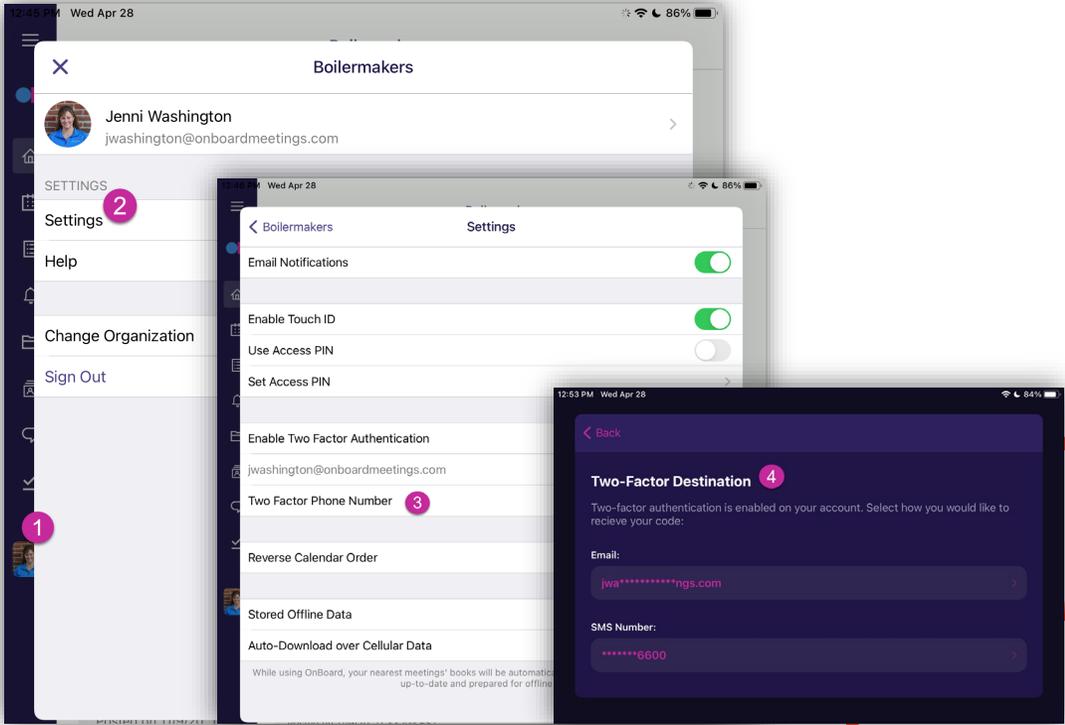
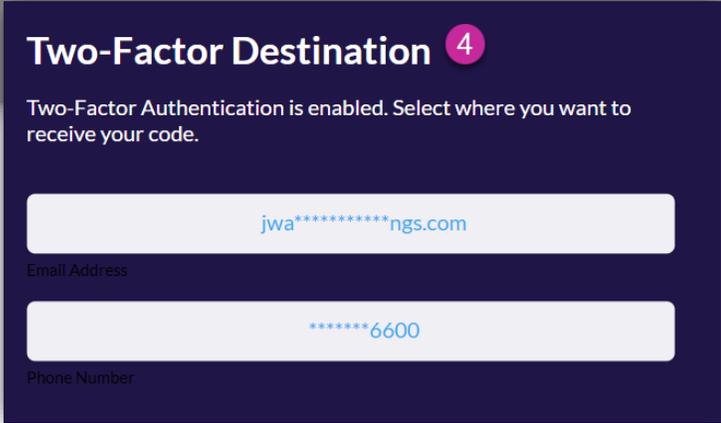
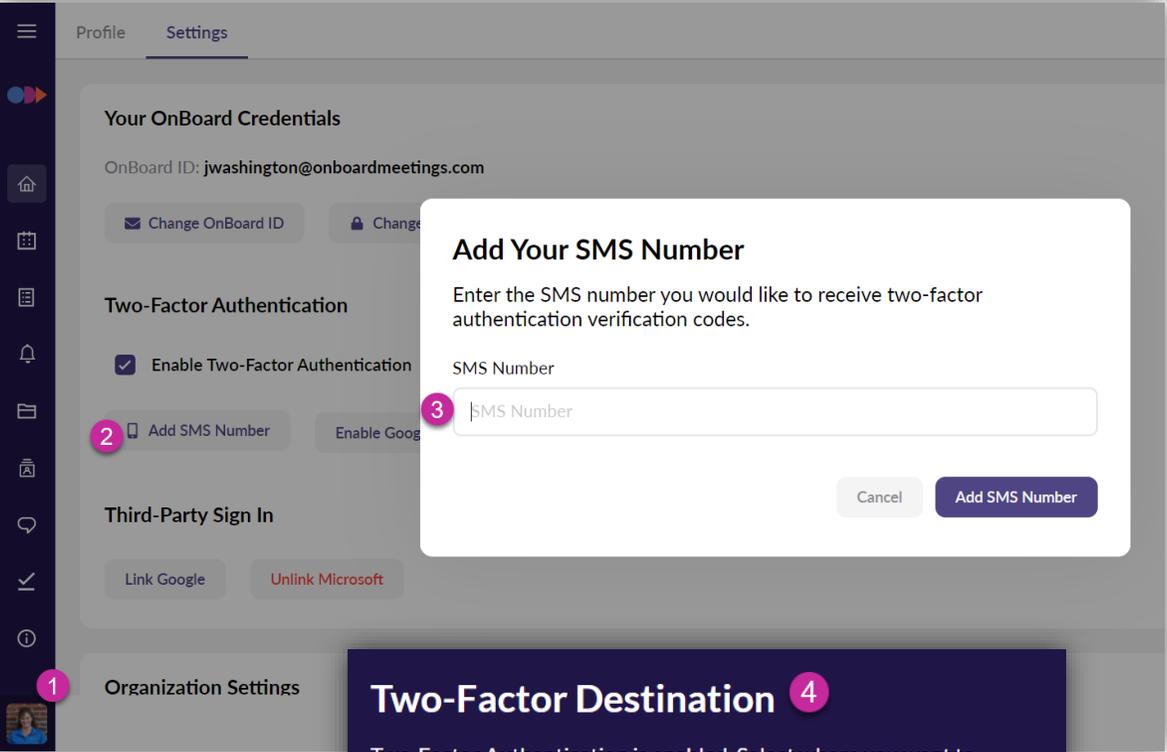
- Access from a computer/laptop:
<https://app.onboardmeetings.com>

- Access from a mobile device:
launch “OnBoard Meetings” App
(available from respective mobile stores)

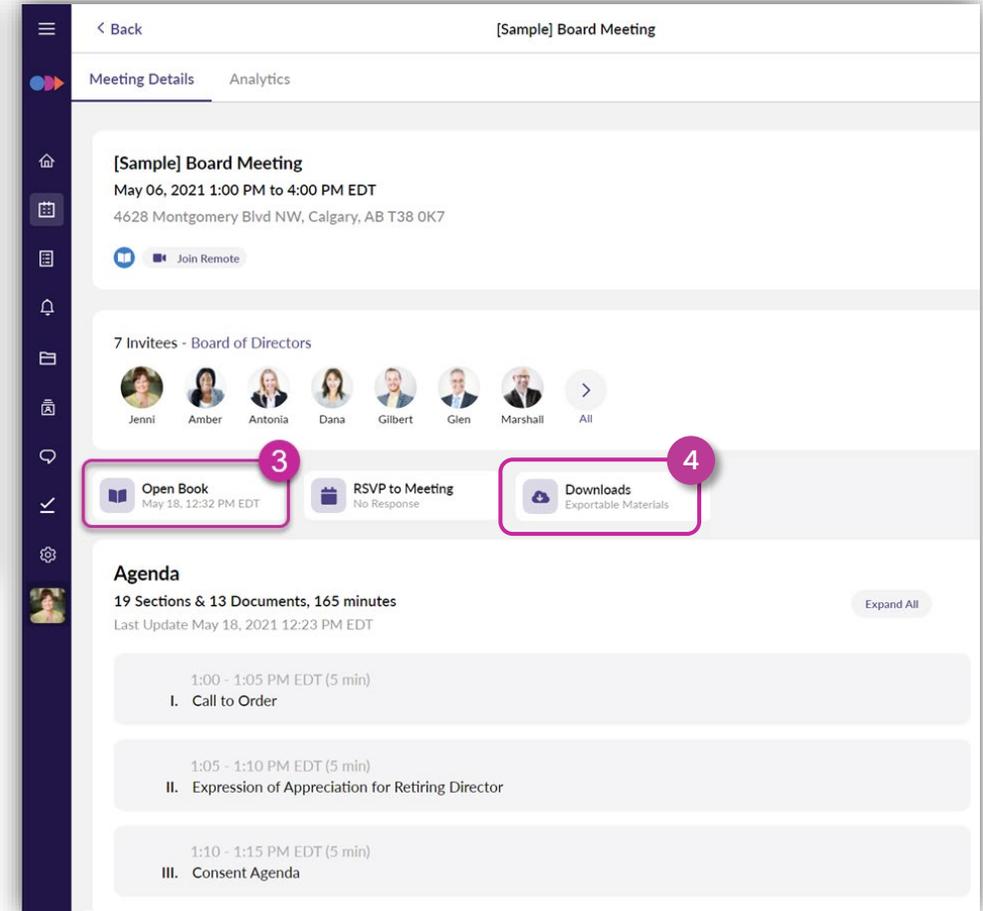
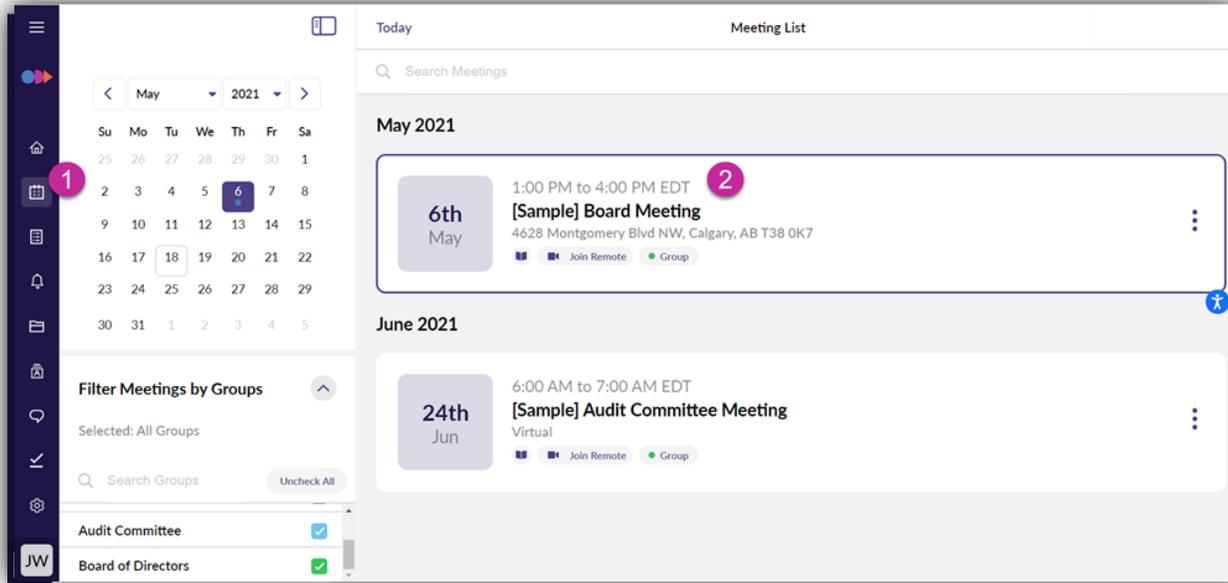


Navigating OnBoard | Enable SMS for Two Factor Login

- 1. Select your Profile icon from the main navigation;
- 2. Tap on Settings;
- 3. Follow steps to set up your cell number;
- 4. Select how you would like to receive your code.



Navigating OnBoard | Accessing Meetings



1. Select Calendar icon from main navigation;
2. Choose a meeting in the list;
3. Select "Open Book" to view the meeting materials;
4. Download and Print the materials.

Navigating OnBoard | Viewing Meeting Book (web)

The screenshot displays the OnBoard web interface for viewing a meeting book. The interface is divided into two main sections: a left sidebar for navigation and a main content area for the meeting details.

Left Sidebar (Navigation):

- Meeting Details:** Includes tabs for Agenda, Annotations, and Invitees. The Annotations tab is active, showing an "Annotation summary view".
- Expand / Collapse Agenda:** A button labeled "Expand All" is visible.
- Table of Contents:** A list of agenda items with a "Hide agenda" button.
- Agenda Items:**
 - 9:00 - 9:10 AM EDT (10 min): I. Call to Order
 - 9:10 - 9:45 AM EDT (35 min): II. Consent Agenda
 - [Sample] 2. Consent Agenda: Includes a "Jump to document" button and a "Download document" button.
 - A. Expression of Appreciation for Retiring Director
 - B. Employee Benefit Plans Name Change

Main Content Area (Meeting Book):

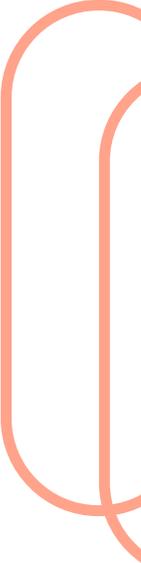
- Header:** "[Sample] Board Meeting", "372 W Ontario St #303, Chicago, IL 60654", "May 2, 2022 9:00 AM EDT".
- Table of Contents:**
 - I. Call to Order.....2
 - II. Consent Agenda.....4
 - A. Expression of Appreciation for Retiring Director
 - B. Employee Benefit Plans Name Change
 - C. Appointment of Treasurer
 - III. Approval of Minutes.....5
 - IV. Review of Quarterly Operating Results.....8
 - A. Financial Report.....9
 - B. Declaration of Quarter Dividend.....12
 - Operation Update.....16
 - A. Approval of New Technology Platform
- Navigation:** A "Jump to section/document" button is located near the "Approval of Minutes" entry. A "Navigate pages" button shows "1 / 29".

Annotations and Callouts:

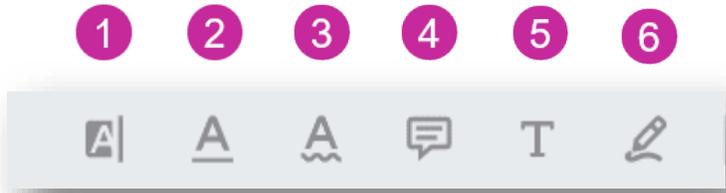
- Exit book:** Points to the top-left navigation icon.
- Zoom in/out:** Points to the zoom controls in the top toolbar.
- View or Annotate:** Points to the "View" and "Annotate" buttons in the top toolbar.
- View Comments:** Points to the comment icon in the top toolbar.
- Search:** Points to the search icon in the top toolbar.
- Full screen:** Points to the full screen icon in the top toolbar.
- Annotation mark-up tools:** Points to the drawing and text tools in the top toolbar.
- View controls:** Points to the top toolbar area.
- Hide agenda:** Points to the "Hide agenda" button in the sidebar.
- Jump to document:** Points to the "Jump to document" button in the sidebar.
- Download document:** Points to the "Download document" button in the sidebar.
- Jump to section/document:** Points to the "Jump to section/document" button in the main content area.
- Hide/show notes:** Points to the "My Annotations" button at the bottom.
- Navigate pages:** Points to the "Navigate pages" button at the bottom.

Navigating OnBoard | Viewing Meeting Book (app)

The screenshot displays the OnBoard app interface for viewing a meeting book. The top navigation bar includes a 'Toggle Full Screen' button, 'Page View Options', and a 'Return to Meeting Details Page' button. Below the navigation bar, there is a search bar and a 'Close Book' button. The main content area is divided into two columns: a left sidebar and a right main panel. The sidebar contains a search bar, '3 Attendees - BA', and a 'Table of Contents' section. The main panel displays the 'GEOTEK SAMPLE Board Meeting' agenda for April 20, 2021, from 10:30 AM to 2:30 PM CDT. It includes a 'Table of Contents' and a list of agenda items with expandable sections. Callouts point to various features: 'Toggle Full Screen', 'Page View Options', 'Return to Meeting Details Page', 'Search', 'Expand Section(s)', 'Annotation / Mark-up Tools', 'Agenda', 'Annotation Summary', 'Messenger', and 'Free Text, Sticky Note, Highlighter, Draw'. The bottom navigation bar includes icons for 'My Annotations', 'Agenda', 'Annotation Summary', and 'Messenger'.



Navigating OnBoard | Viewing & Annotating Materials



1. Highlighter Tool – Highlight blocks of texts in many color options.
2. Underline – emphasize text with an underline.
3. Squiggly Underline – emphasize text with a squiggly underline.
4. Sticky Note Tool – Drop a pin anywhere on your page and type reference notes off to the side.
5. Free-Text Block Tool – Click + drag a textbox and begin typing directly on the page.
6. Free-hand Pen Tool – Write/Draw directly on the page.

1

Appointment of new Committee Chair:

Today, we are excited to announce Cecil Harvey has been appointed to chair the Compensation Committee. Mr. Harvey is a 24-year veteran of the financial services industry. Mr. Harvey serves on the board of the Carnegie Museum of Natural History, the University of Texas and a Master's degree in economics from the University of Chicago.

2 17 new members contributing \$2,250

3 44 others contributing \$6,765.00

4

evaluated, and he or she should not be present at the meeting. Where an independent service provider is used, the Director should ensure that the provider is qualified and that the evaluation is accurate.

Jenni Washington
Can we get a copy of the last evaluation?

5

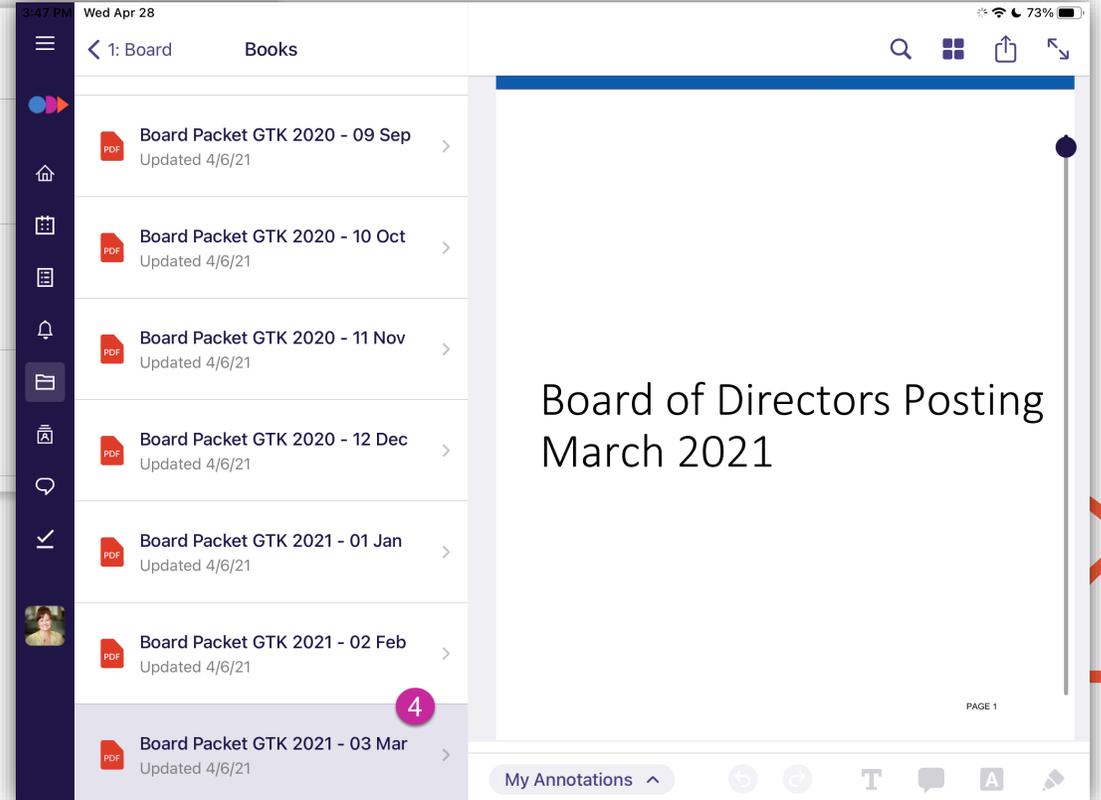
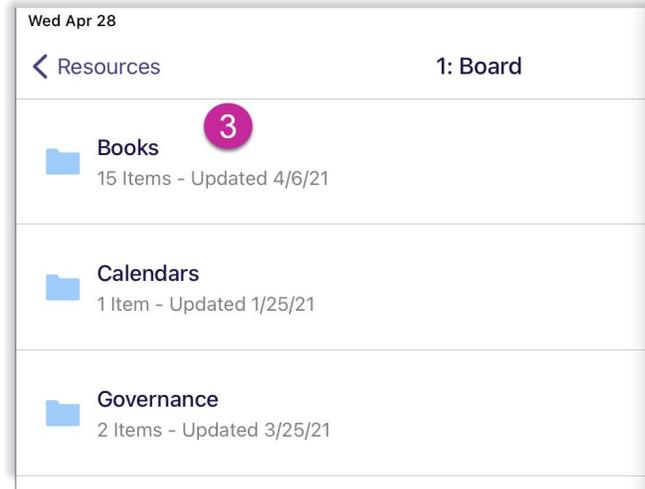
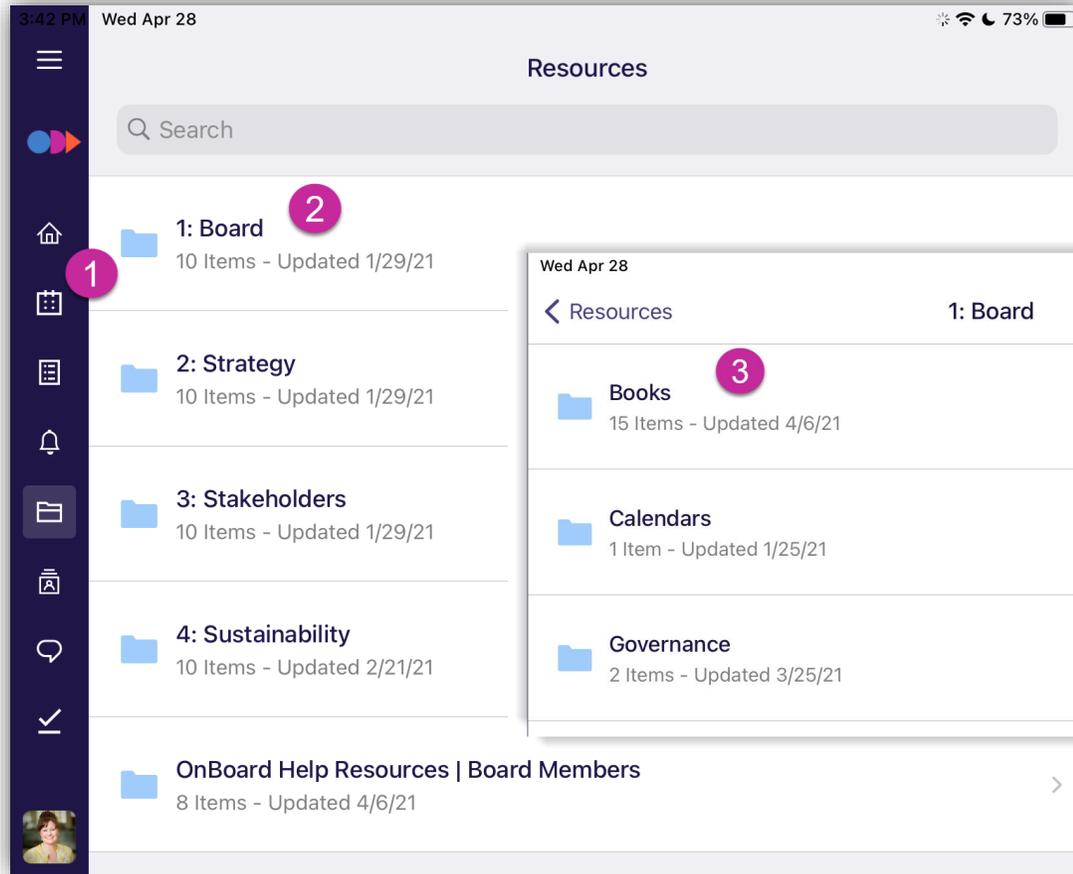
Operations update **integration timeline?**

A. Approval of new Technology Platform



Navigating OnBoard | Accessing Resources

1. Select Resources icon from navigation;
2. Tap on a primary folder;
3. Choose a subfolder;
4. Select a document to view.



Appendix: Advanced Features



Shared Annotations

Messenger

Approvals

Surveys

eSignatures

Tasks

Navigating OnBoard | Voting on Approvals

The screenshot displays the OnBoard application interface. On the left is a dark sidebar with the OnBoard logo and navigation options: Dashboard, Calendar, and Actions (1). The main content area has a top navigation bar with 'Approvals' (2), 'Surveys', 'eSignatures', and 'Questionnaires'. Below this is a search bar for 'Filter Approvals'. A list of 'Open' approvals is shown, with the first one being '[Sample] Approval of Board Meeting Minutes' (3), which has 'No Close Date' and 'You have not yet submitted your vote'. To the right, a detailed view of this approval is shown, including the title, date, and a request to review and vote. It features a document attachment 'Meeting Minutes' (4), a 'View Discussion' link (5) with '1 Comments', and a 'Cast Vote' section (6) with buttons for 'Yes', 'No', and 'Abstain'.

1. Select Actions from the main navigation;
2. Choose Approvals at the top of the page;
3. Select the open approval from the list.

4. Click Document Name to view related materials.
5. Click Comments area to participate in Discussion
6. Click Yes/No/Abstain to cast your vote.

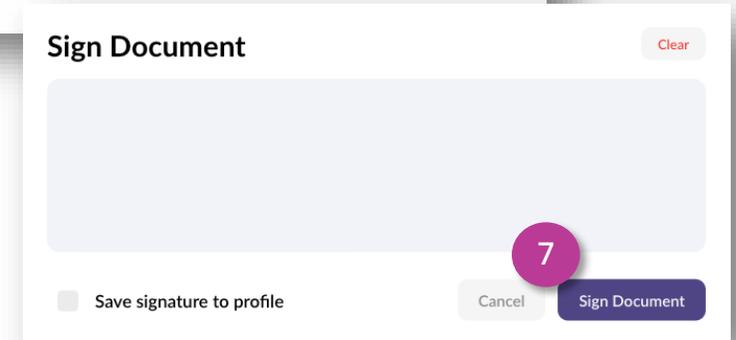
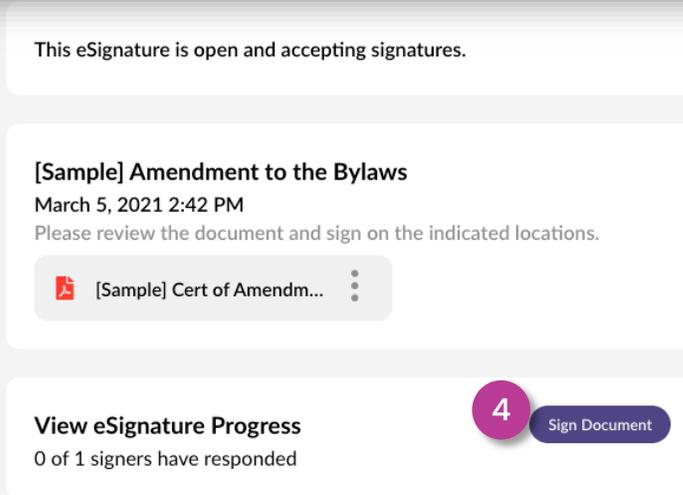
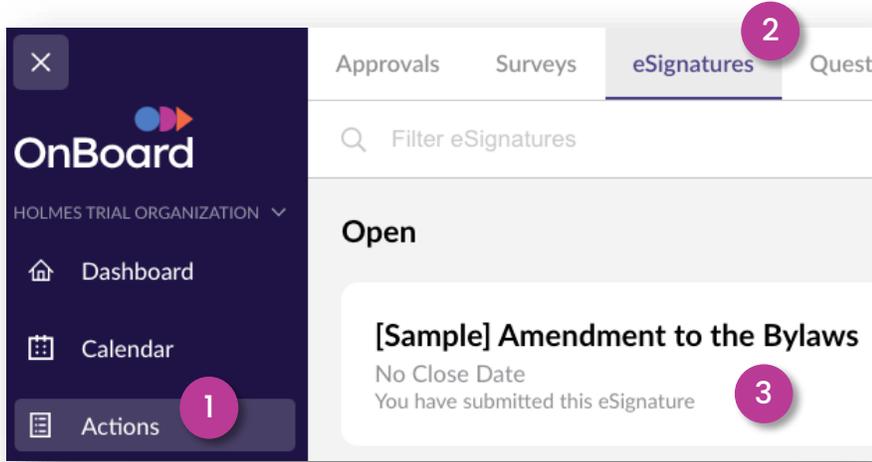
Navigating OnBoard | Responding to Surveys

The screenshot shows the OnBoard interface. On the left is a dark blue sidebar with the OnBoard logo and navigation options: Dashboard, Calendar, and Actions (marked with a pink circle 1). The main content area has tabs for Approvals (marked with a pink circle 2), Surveys, eSignatures, and Questions. Below the tabs is a search bar for surveys. Under the 'Open' section, a survey card for '[Sample] Board Evaluation Survey' is shown, indicating it has no close date and that the user has not taken it (marked with a pink circle 3). Below this card is an 'Action List' for the survey, which includes a message that the survey is open, the survey title and date, a brief description, and a 'Survey Questions' section with a 'Take Survey' button (marked with a pink circle 4).

The screenshot shows a survey question titled '[Sample] Board Evaluation Survey' with 6 questions and a last update of March 5, 2021 2:34 PM. A green 'Submit' button is in the top right corner (marked with a pink circle 6). The question is: '1. Our organization has a three to five-year strategic plan or a set of clear long range goals and priorities.' (marked with a pink circle 5). The question is marked as 'Required'. Below the question is a horizontal scale of radio buttons from 0 to 10.

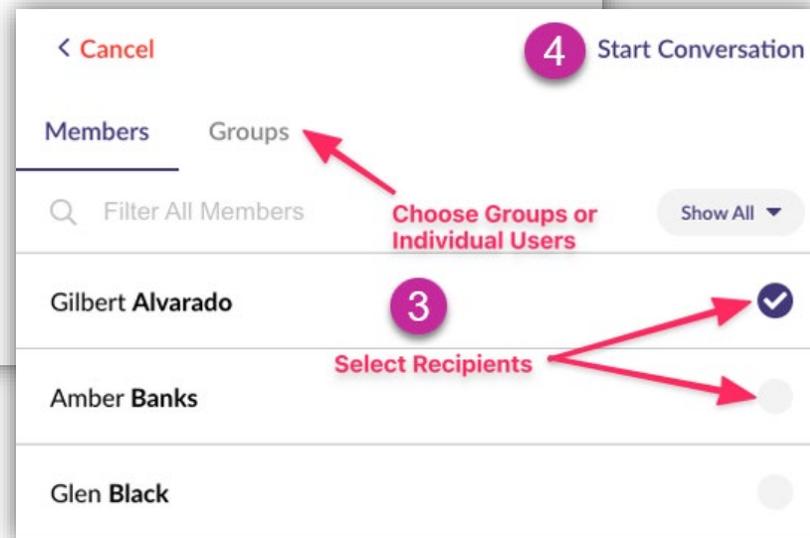
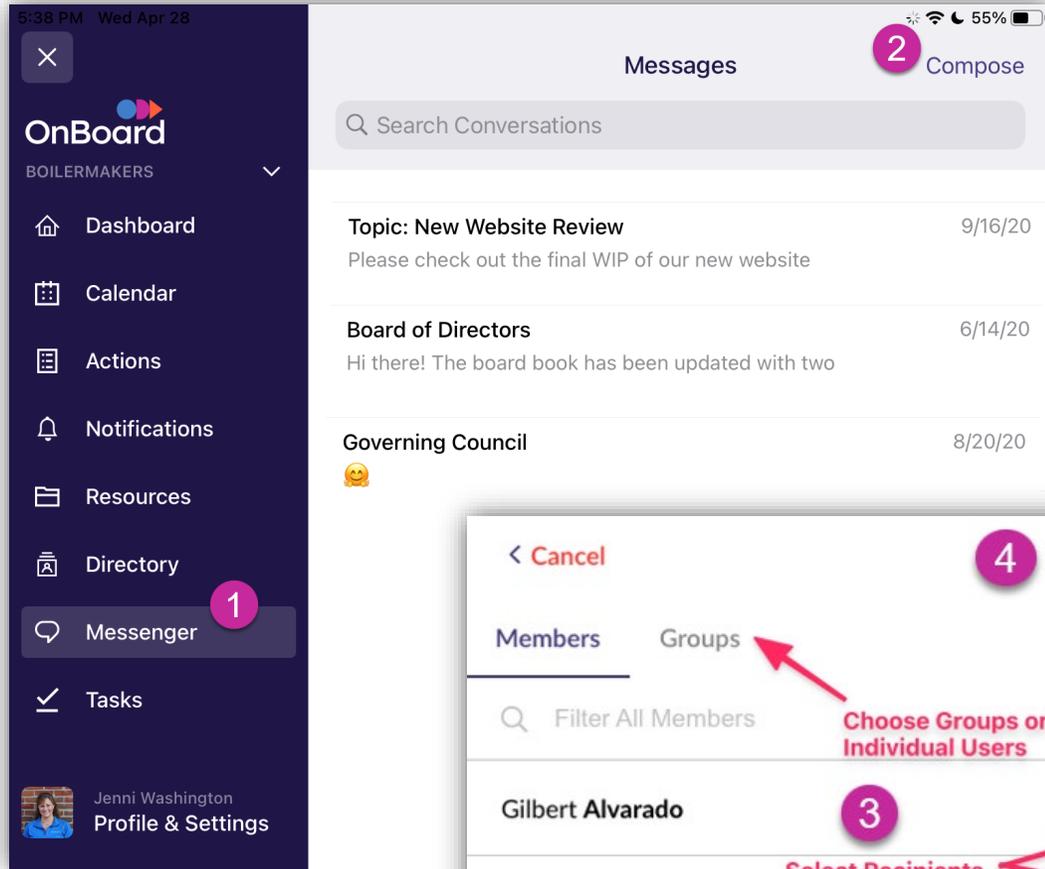
1. Select Actions from main navigation;
2. Choose the Surveys tab;
3. Select survey from the list;
4. Click Take Survey after reviewing details;
5. Answer questions;
6. Submit when finished.

Navigating OnBoard | eSigning Documents



1. Select Actions from main navigation;
2. Choose the eSignatures tab;
3. Select the open eSignature;
4. Click Sign Document after reviewing details;
5. Use the Next button to locate each signature block;
6. Click/Tap the block;
7. Write name or apply saved signature and click Sign Document.

Navigating OnBoard | Sending Messages



1. Select Messenger from navigation;
2. Click to Compose (or select an existing message thread);
3. Select a single user, multiple users, or an entire group;
4. Click Start Conversation;
5. Type your text into the message bar and click the Send icon.

Navigating OnBoard | Creating & Managing Tasks

The image displays three sequential screenshots of the OnBoard application interface, illustrating the steps to create and manage tasks. The first screenshot shows the main navigation menu on the left, with the 'Tasks' option highlighted. The second screenshot shows the 'Task List' screen, which is currently empty and displays a 'No Tasks Assigned to You' message with a 'Create Task' button. The third screenshot shows the 'Task Details' form, which includes fields for Task Name, Due Date & Time, Description, Status, Priority, Task Documents, Assignees, Viewers, and Linked Meetings.

1. Select Tasks from main navigation;
2. Click the Create New Task button;
3. Complete the Task Details;



OnBoard

Contact & Help

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