

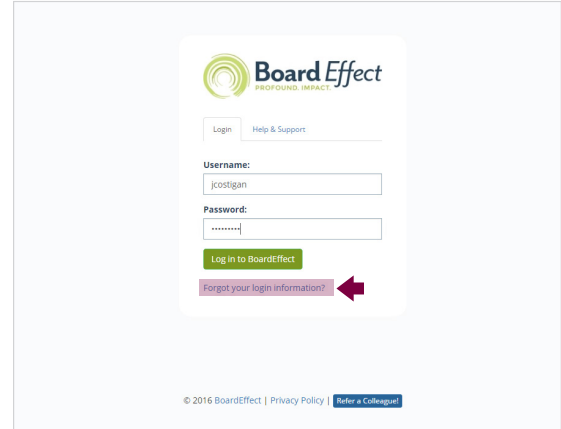
Step 1

Enter your organization's platform URL in your web browser to navigate to your portal (~~your organization boardeffect.com~~).

Enter your username and password and click "Log in to BoardEffect."

TIP:

Don't know your Password? Click "Forgot your login information?" and enter your Username or Preferred email address to receive further instructions.

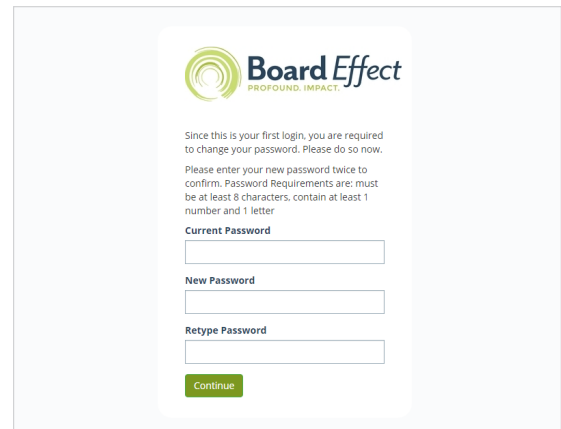
A screenshot of the BoardEffect login portal. The page features the BoardEffect logo at the top left, with the tagline "PROFOUND. IMPACT." below it. To the right of the logo is a "Login" button and a "Help & Support" link. Below these are input fields for "Username:" (containing "jcostigan") and "Password:" (containing "*****"). A green "Log in to BoardEffect" button is positioned below the password field. To the right of this button is a link that says "Forgot your login information?" with a red arrow pointing to it. At the bottom of the page, there is a copyright notice "© 2016 BoardEffect | Privacy Policy | Refer a Colleague".

Step 2

The first time you log in, you will be required to change your password. The password is case sensitive.

The password must contain at least:

- Eight characters
- One letter
- One number

A screenshot of the BoardEffect password change screen. The page features the BoardEffect logo at the top left, with the tagline "PROFOUND. IMPACT." below it. Below the logo is a message: "Since this is your first login, you are required to change your password. Please do so now." followed by "Please enter your new password twice to confirm. Password Requirements are: must be at least 8 characters, contain at least 1 number and 1 letter". Below this message are three input fields: "Current Password", "New Password", and "Retype Password". A green "Continue" button is located at the bottom of the form.

Accessing and logging into BoardEffect from your computer

1. Enter your organization's URL into your browser: ~~https://yourorganization.boardeffect.com~~.
2. Enter your user name.
3. Enter your temporary password provided by your platform administrator.
4. Click Log In.

The first time you log in, you will be required to change your password.

Note:

Password requirements: At least 8 characters and include both letters and numbers. The password is case sensitive.

Navigating BoardEffect

My BoardEffect Landing Page: The first page you will see after you log in. It includes:

Welcome Message: A platform greeting and general area for organizational notifications.

Organizational News: Shown on the far right of your platform.

Upcoming Events: Shown below the Welcome Message, it is a list of all of your upcoming meetings, polls, surveys, and tasks.

Top Navigation Icons:

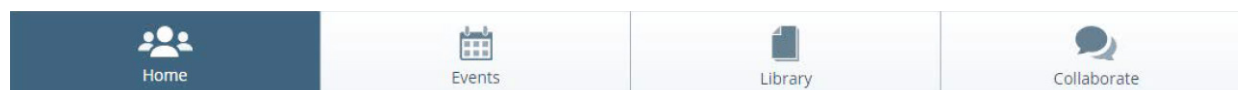


My Profile: Click the drop-down arrow to access/edit your User Profile, reset your password, access help, and log out. **Directory:** View or search for contact information pertaining to fellow board/committee members.

Directory: View or search for fellow board/committee members.

Libraries: Access documents, folders, and Meeting Books.

Workrooms: Located in the left hand navigation bar and displays a list of all Boards or Committees are assigned to.



Events: Displays a list of all upcoming meetings and events specific to this Workroom.

Library: Find Meeting Books, Handbooks and other files accessible in this Workroom.

Collaborate: Contains surveys, polls, tasks, schedulers, and discussions.

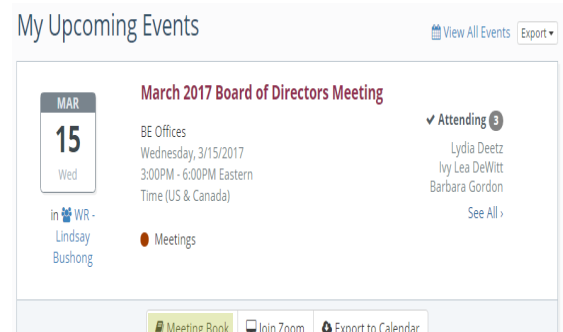
Step 1

Your administrator will notify you that meeting materials are available.

From the “My BoardEffect Landing Page,” scroll down until you see “My Upcoming Events.” Click on the “Book” icon.

Note:

If the book is not attached to the Event Card, navigate to Libraries to select your Workroom, and from there your Meeting Book.

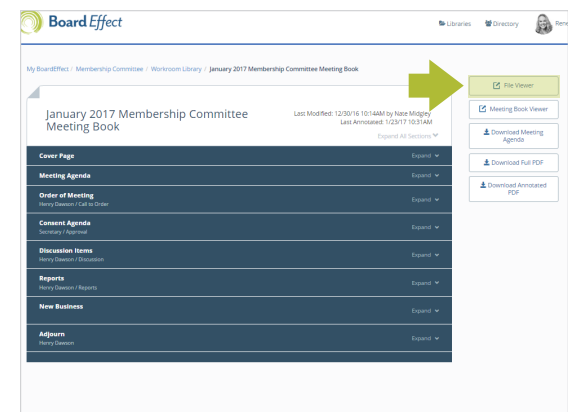


Step 2

The Meeting Book will display. Click on the “File Viewer” button to navigate the Meeting Book by individual files.

TIP:

Board Members may have additional viewing options to view or download a Meeting Book.



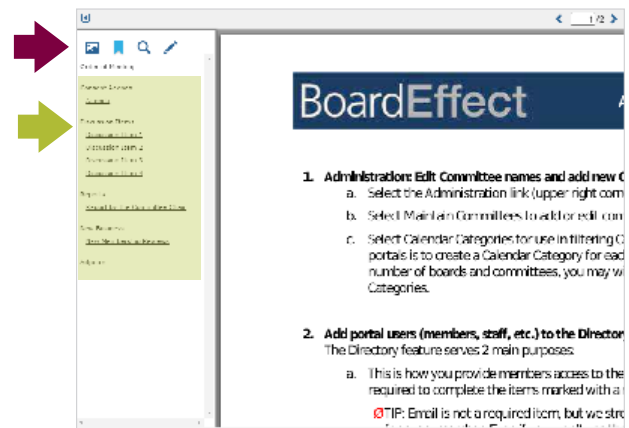
Step 3

A new web browser page will load and display your Meeting Book. Use the following tools when reviewing the meeting materials:

- **Toggle** between thumbnail and bookmark view
- **Search** for text in the document
- **Annotate** using the tools built into your File Viewer by selecting the blue “Pencil” icon

Note:

Upon exiting the File Viewer when annotations are saved, you will see an option to download a copy of the annotated PDF.

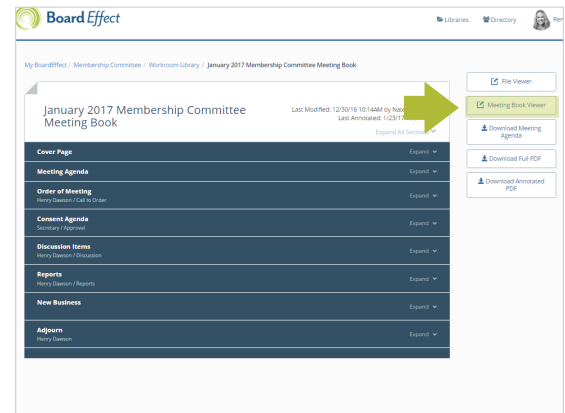


Step 4

Alternately, you can select the “Meeting Book Viewer” display to scroll through the entire Meeting Book as it would appear in a PDF version.

Note:

If the book is not attached to the Event Card, navigate to Libraries to select your Workroom, and from there your Meeting Book.



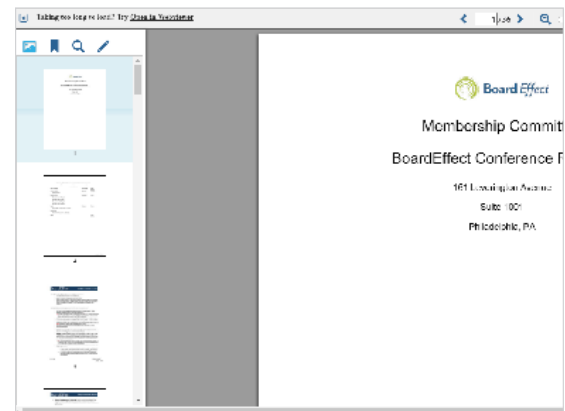
Step 5

A new web browser page will load and display your Meeting Book. Use the following tools when reviewing the meeting materials:

- **Toggle** between thumbnail and bookmark view
- **Search** for text in the document
- **Annotate** using the tools built into your Book Viewer by selecting the blue “Pencil” icon

TIP:

If your Meeting Book is taking a long time to load, try opening the Book with the File Viewer option.



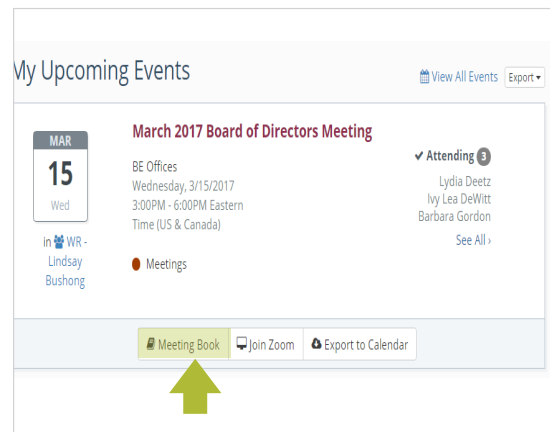
Step 1

Your Administrator will alert you when a Meeting Book is available to view.

From the "My BoardEffect Landing Page," scroll down until you see "My Upcoming Events." Locate the event to which the Meeting Book is associated and click on the Meeting Book icon.

Note:

If the book is not attached to the Event Card, navigate to Libraries to select your Workroom, and from there, your Meeting Book.

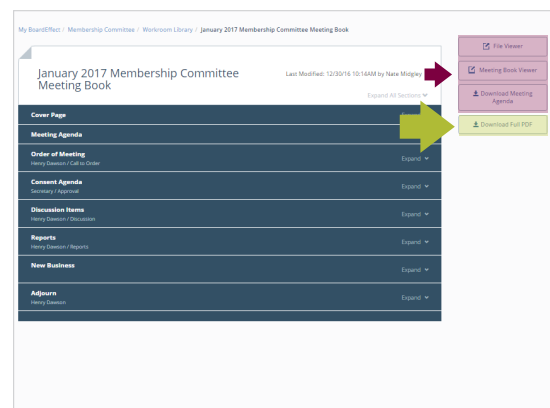


Step 2

The Meeting Book will display. You can download the Meeting Book to your computer by clicking "Download Full PDF."

TIP:

Additionally, Board Members can open the Meeting Book in the "File or Meeting Book Viewer."



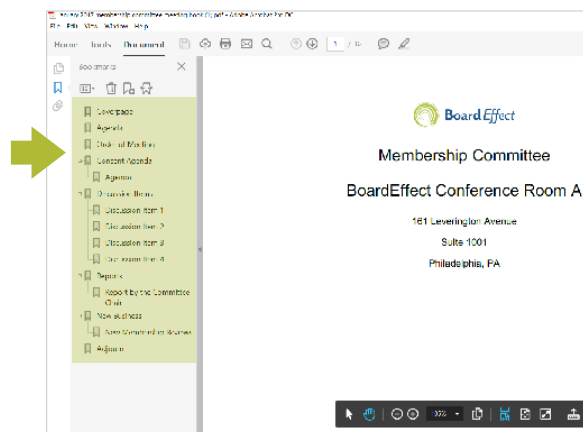
Step 3

Once the PDF has downloaded, it will open on your computer. Use the following tools when reviewing the meeting materials:

- **Toggle** between thumbnail and bookmark view
- **Search** for text in the document
- **Annotate** using the tools built into your File Viewer by selecting the blue "Pencil" icon

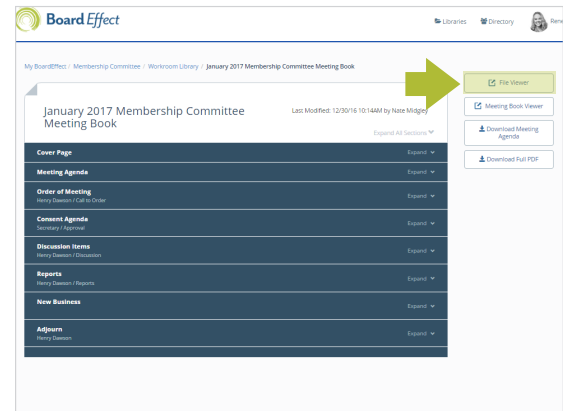
Note:

The PDF may vary slightly depending on your computer's PDF software.



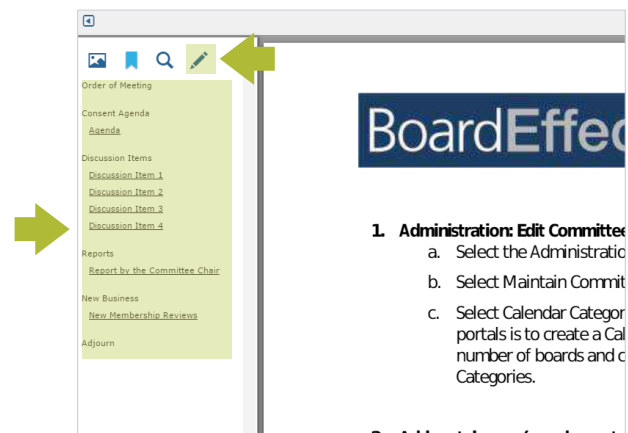
Step 1

Select "File Viewer" to open the Meeting Book.



Step 2

The Meeting Book Outline and navigation panel is displayed on the left. To annotate your meeting book, select the Pencil icon located in the upper left corner of this panel to display the available annotating tools.

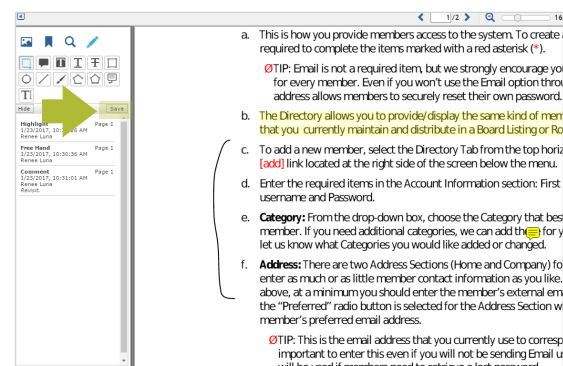


Step 3

Once all annotations have been completed, select "Save."

Note:

A PDF version of your annotated document will become available for download upon exiting the web viewer.





iPad



App Store



Android



Google Play

iPad/iPhone apps

The iPhone and iPad BoardEffect apps are available in the Apple App Store.

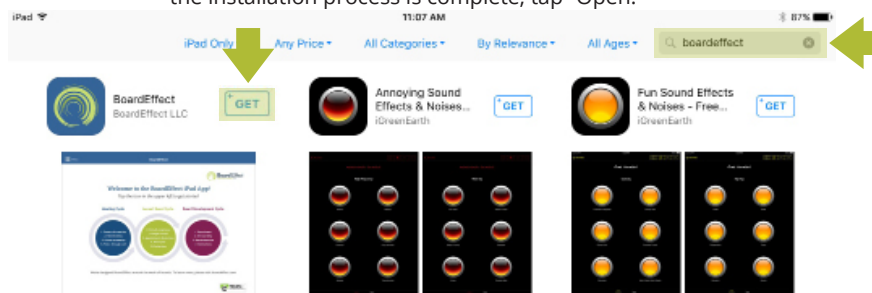
Note:

Requires an Apple ID and password.

1. To open the Apple App Store, locate the icon pictured below on your iPad or iPhone and tap on it.



2. Search the App Store for "BoardEffect." Tap "Get" when the BoardEffect icon is located and then tap to "Install." When the installation process is complete, tap "Open."



Android Tablet apps

Android tablets and Phone apps are available in the Google Play Store.

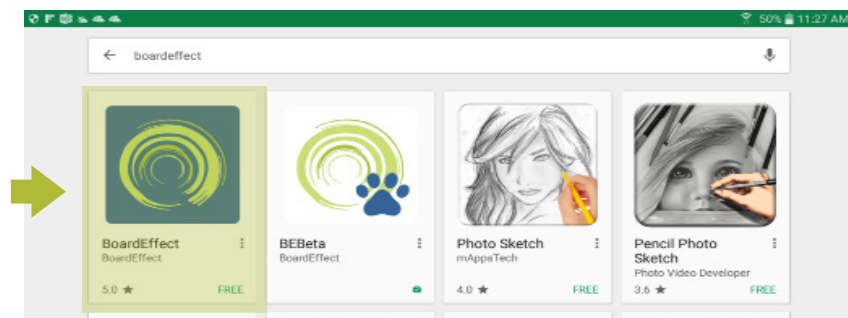
Note:

Requires a Gmail account and password.

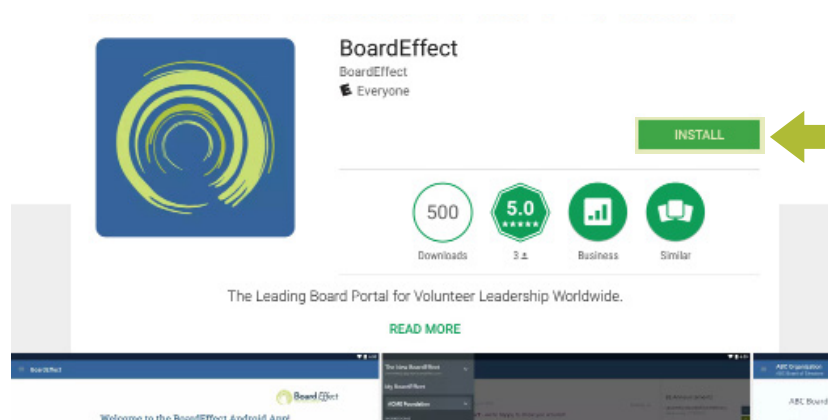
1. To access the Google Play Store, find and tap the icon pictured below from your device.



2. Search the Google Play Store for "BoardEffect" and tap on the icon when found.



3. Tap "Install." When the installation process is complete, tap again to open.



Additional Information on how to use platform and in particular the different mobile applications can be found in the BoardEffect knowledge base at <https://helpcenter.boardeffect.com/hc/en-us/categories/202650468>



Search Knowledge Base



BoardEffect > Board & Committee Members

Board & Committee Members

Accessing BoardEffect

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[Board Member General Guide: Web Based Platform 1Pager](#)

[Download BoardEffect: Google Play & Apple App Store Guide](#)

[Board Member: Using the Meeting Book Viewers](#)

[Board Member: Annotating a Meeting Book using the Web Viewer](#)

[Board Member: Downloading a PDF Copy of a Meeting Book](#)

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Overview and Orientation to BoardEffect

[Board Member Orientation: Web Based Platform](#)

[Board Member Orientation, iPad Application](#)

[Navigating the Landing Page](#)

Using the BoardEffect iPad Application

[Board Member Login, iPad Installation and Authorization Guide](#)

[Board Member iPad Guide: Finding Meeting Materials](#)

[Board Member: iPad RSVP Using My Upcoming Events](#)

[Board Member iPad Guide: Annotating Meeting Books](#)

[Board Member: iPad Log Off](#)

[Board Member Login, iPad Application User Guide](#)

Using the BoardEffect Android Application

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[Board Member Android: Menu Navigation](#)

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[Board Member Phone: Reference Guide](#)

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Collaboration Tools

[Completing Polls & Surveys](#)

[Subscribing to Calendar Events in BoardEffect](#)

[Linking Your LinkedIn Account to Your BoardEffect Profile](#)

[Completing Tasks in BoardEffect](#)

[Responding to Discussions](#)