ONBOARD

QUICK START GUIDE
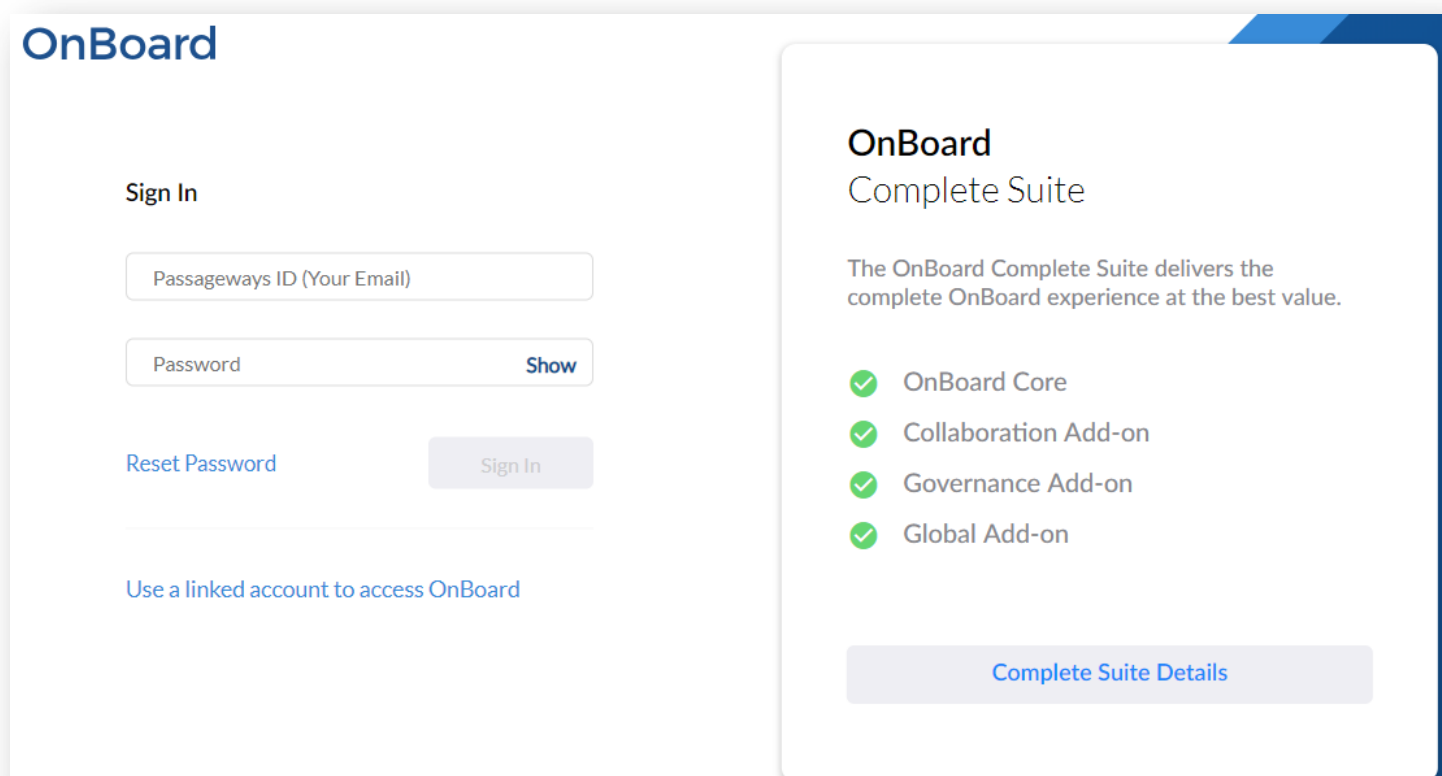
Passageways OnBoard Quick Start Guide

Welcome to OnBoard! This Quick Start resource is designed to guide you through your initial access to OnBoard. This process should take 3-5 minutes and covers accepting your invitation to OnBoard, setting up your profile, and downloading the OnBoard iPad app.

Part 1: Installing or Accessing the OnBoard App.

The first step in using the OnBoard App is to install the App on your mobile device of choice. OnBoard is available on your iOS devices (iPad/iPhone), Android devices (phones or tablets), Windows devices (desktop, phones, or tablets), and the Kindle Fire. However, if you prefer to use your laptop or desktop computer, you can just use your normal internet browser.

Accessing OnBoard on the Web

Accessing OnBoard from your computer's web browser is easy! Visit https://onboard.passageways.com and use your OnBoard ID credentials to log in. (We'll discuss those further in Part 2.)

Part 2: Logging into OnBoard & Accepting the Invitation

This part of the guide will walk you through accepting your invitation to onboard and creating your OnBoard ID.

Login using your Temporary Credentials

You can continue the account creation process from any of the supported device types mentioned above. An administrator at your organization will let you know which email address they've used to create your account, as well as a temporary password. If you are unsure what either of these two are, please be sure to reach out to an administrator at your organization.

Once you have the email address and temporary password provided by your administrator, open the previously downloaded app or head over to the OnBoard Login Page (http://onboard.passageways.com). Key in the email address and temporary password provided to you and click Sign In.

Next, you'll be prompted to change the temporary password into your account's permanent password. This is what will make the account securely yours from here on out.

Actions

The Actions icon shows you any actions that you have been asked to participate in. Examples of these Actions are Approvals. Surveys, and eSignatures. There are three statuses that these Actions fall into; Draft, Open, and Closed. The Draft status is for Actions that have created, but are not yet open for participation. The Open status is for Actions that are ready for you to participate in. The Closed status is for Actions that have been closed and finalized.   In order to access any of your Actions, expand the status you wish to examine and then click on the Action you wish to view.

2. Switch between Approvals, Surveys, and eSignatures

1. Open Actions Menu

3. Click any Action in the Open Status to participate
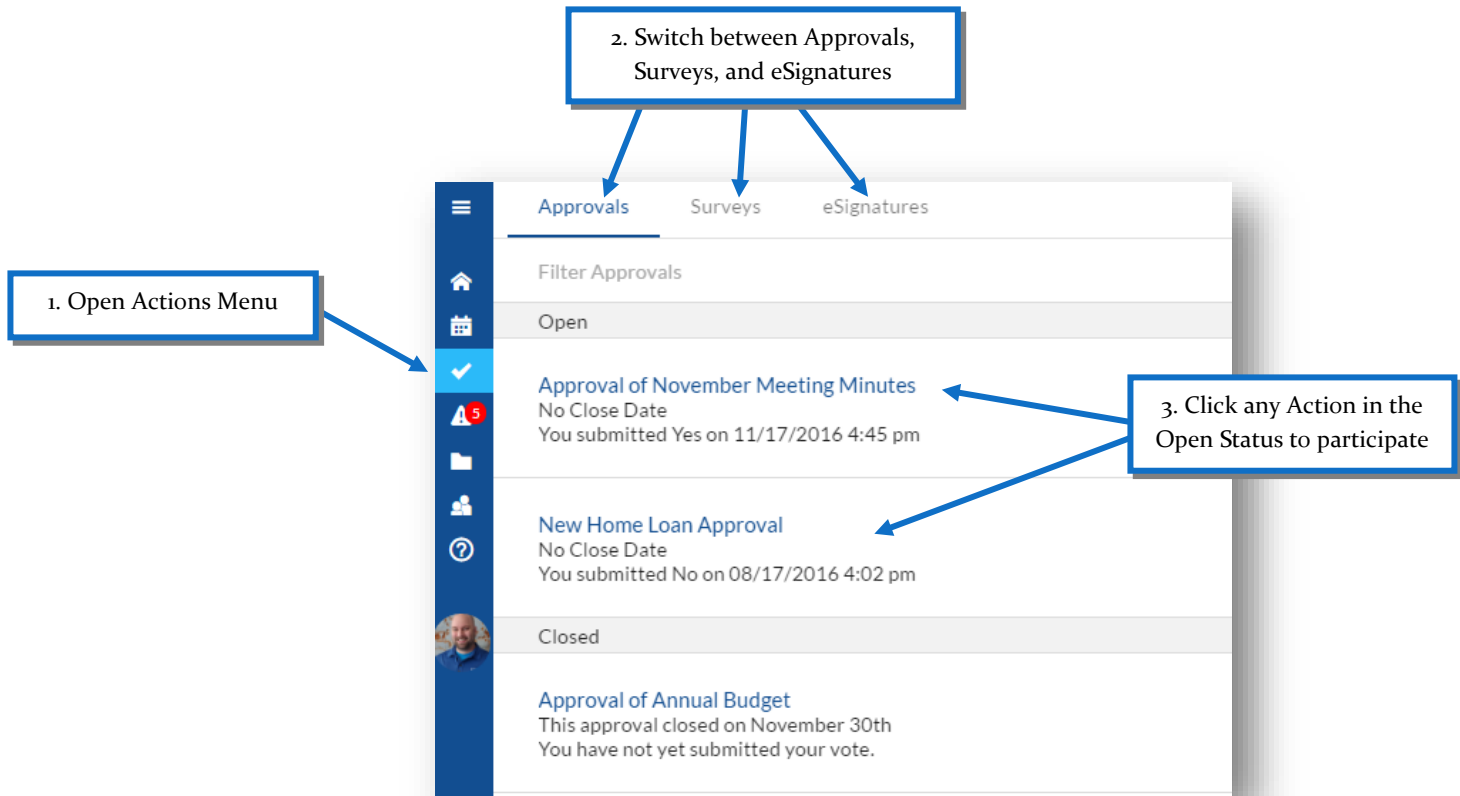
Actions can also be linked directly to Agenda Sections. Clicking the View Action icon next to any agenda section will bring you to the linked action item.

View Linked Action
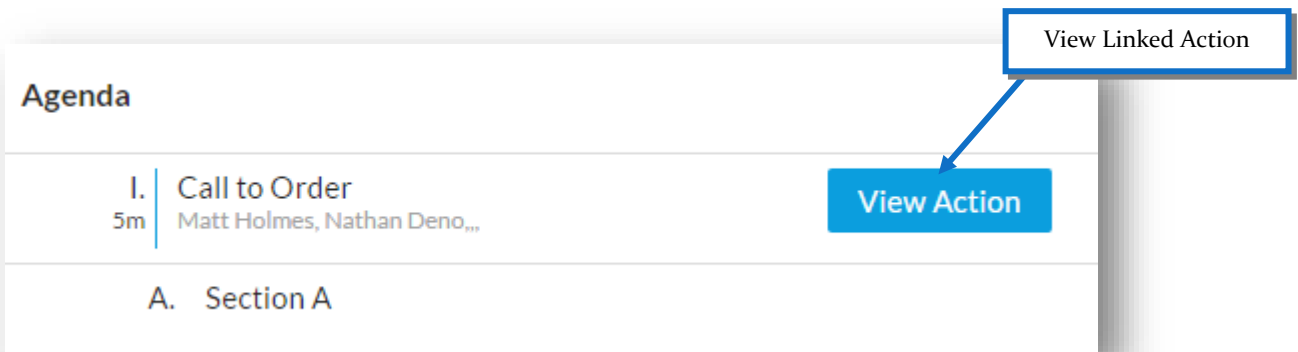
Submitting a Vote on an Approval

In order to submit your answer to an open approval, simply select the approval from the available Open Approvals. This will then open the approval for you to read the description and review any supporting documents. You can choose from three possible options to cast your vote: Yes, No, or Abstain. Please note that you are able to change your vote at any point until the approval is closed by going back into the open approval and making your change. If your Administrator has enabled it, you may also be required to sign your name when casting your Approval vote. If this is the case, just use your mouse to draw your signature within the box provided.

Approval Details

Meeting Minute Approval - Oct Board Meeting

Motion - Matt Holmes   Open Date - 10/11/16 10:40 am
Second - Nathan Deno   Close Date -

Approval Description

Please review the attached materials, and cast your vote for approval. Please let the Administrator know if you have any questions. Thanks!

Supporting Documents

Discussion
   0 Comments
   No Comments

(Optional) Click to Join Discussion and Comment on Approval

Cast Vote

Yes   No   Abstain

Select Option to Submit Vote

Cancel   Yes with Signature   Add

☐ Save Signature to Profile   Clear Signature

Participating in a Survey

To begin, select the desired Survey from the Open Surveys status in the Actions menu. This will then open the Survey for you to read the description and begin answering any of the questions in the list. The Survey's creator may have indicated certain questions as "required", meaning that these particular questions must be answered before the Survey can be submitted. After you have made your answer choices, make sure to hit the Submit button to confirm your answers. Please note that you are able to change your answers and resubmit your Survey at any point until the Survey is marked as Closed.

Survey Details

2016 Annual Board Assessment Survey

Open Date - 10/04/16 02:48 pm   Close Date - 10/04/16 03:01 pm

Please take a moment to fill out the questions included within this Survey. Your answers will help make our Board more effective as we begin the 2017 calendar year. Thank you!

1. How do you prefer to receive your board book materials?

2. How effective has the board been in the past year?

1. Click any question to begin answering

← Survey Details   View Results

Question 1

How do you prefer to receive your board book materials?

☐ iPhone/iPad

☐ Computer/Laptop

☐ Paper

2. Select Answer Choices

Question 2

How effective has the board been in the past year?

Very Uneffective   Uneffective   Neutral   Effective   Very Effective

○   ○   ○   ○   ○

3. Submit Survey   **Submit Survey**