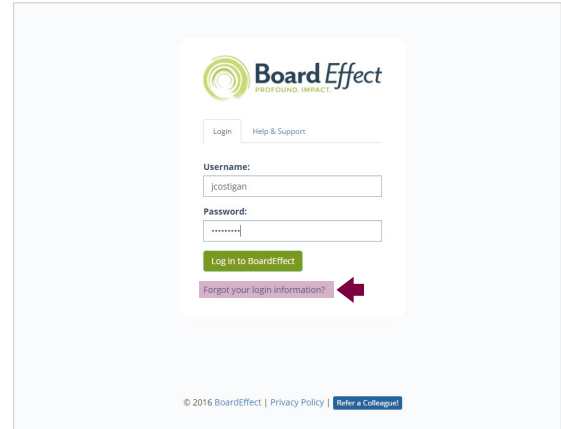## Step 1

Enter your organization's platform URL in your web browser to navigate to your portal (yourorganization.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.
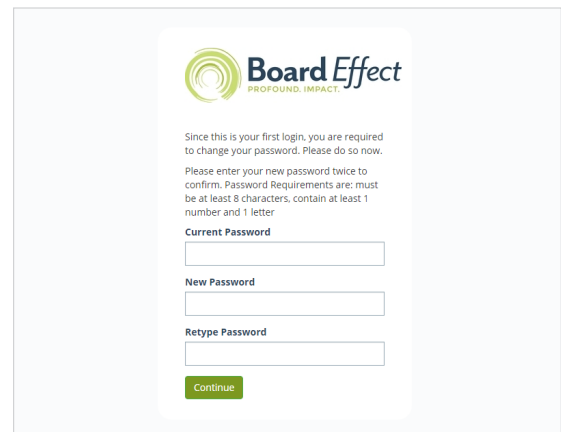
Step 2

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

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.
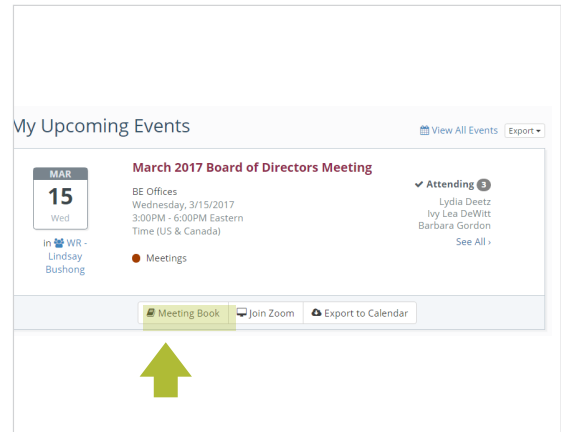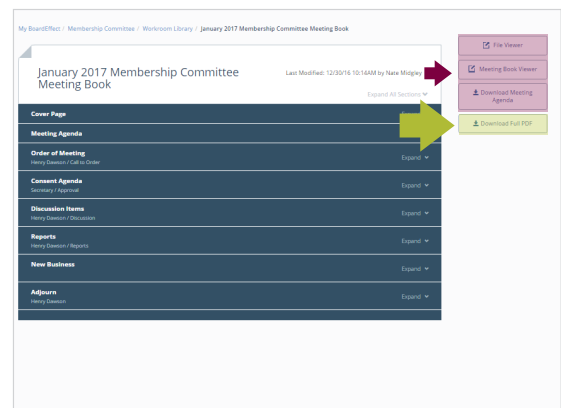
Step 2

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."
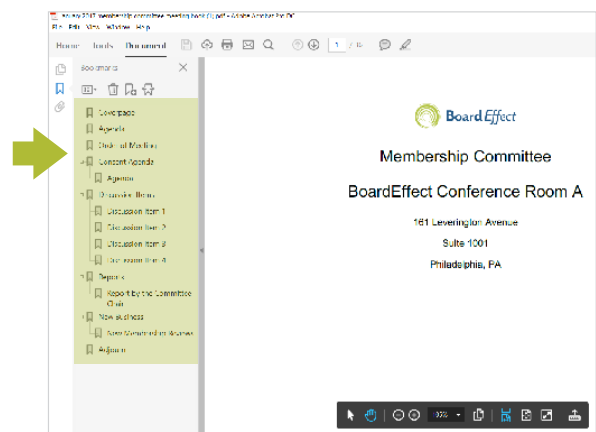
Step 3

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

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 Libaries to select your Workroom, and from there your Meeting Book.
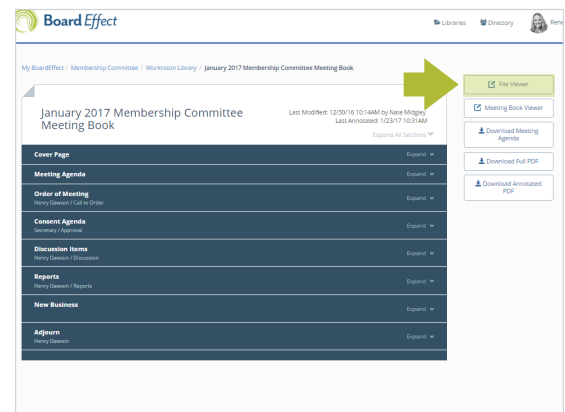
Step 2

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 Libaries to select your Workroom, and from there your Meeting Book.
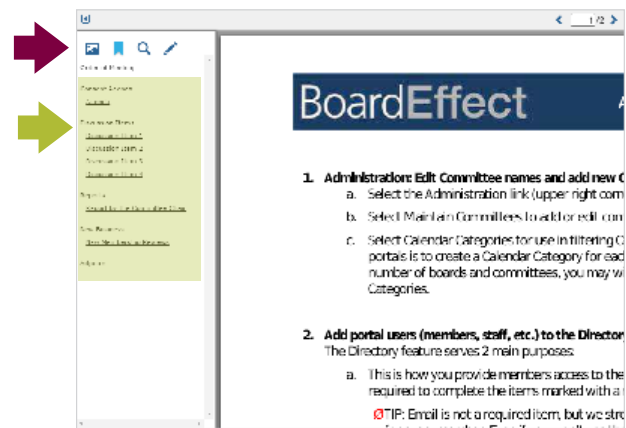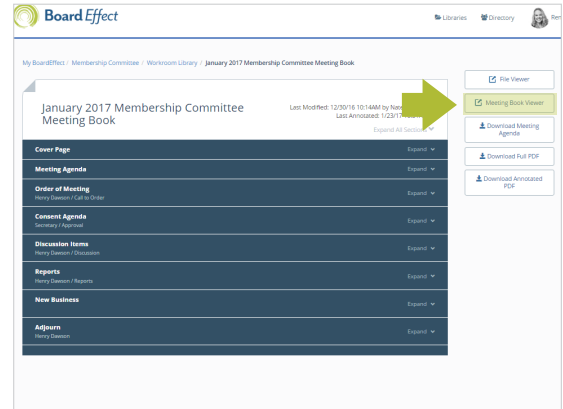

Step 5

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.
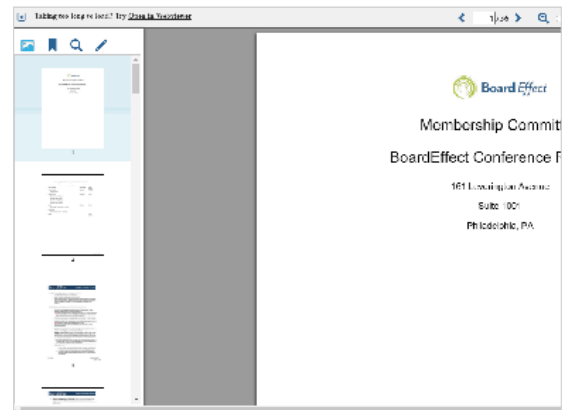
Step 1

After logging into your BoardEffect Account using an Internet browser such as Google Chrome or Microsoft Internet Explorer, you will see a Welcome Message, which indicates that you are on the My BoardEffect Landing Page.
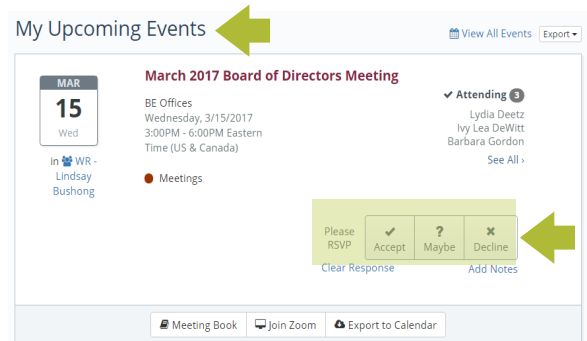
Note:
If the email notification you received contains a link to the RSVP, click the link to respond directly from your email without having to log in to the platform.
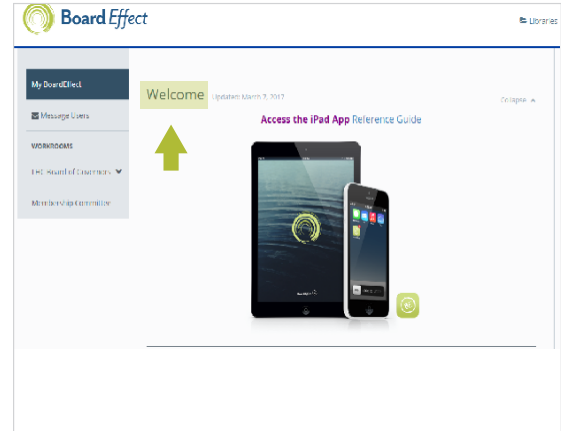
Step 2

Scroll down the screen until you see "My Upcoming Events." Locate the Event with which you wish to RSVP for.
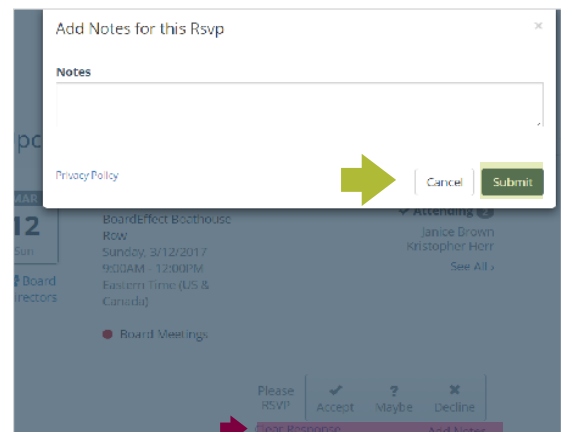
Click the box that corresponds with your response: "Accept," "Maybe," or "Decline."

Step 3

Select "Clear" to remove a previous response or click "Add Notes" if you wish to send a message to the Administrator using the blue hyperlinks.

To "Add Notes," enter your text and click "Submit."

Step 1

From the "My BoardEffect Landing Page," scroll down to see "My Polls and Surveys."

Click on the name of the Poll or Survey to which you have been invited.

TIP:
Members may also access Polls and Surveys by selecting their Workroom and selecting the "Collaborate" tab. Additionally, Polls and Surveys may now be attached to an Event.

Step 2

Enter your responses and click "Submit" when finished.

TIP:
Users have the ability to save their progress before completing a survey. This will not mark a survey as complete, however; it will allow a user to return to the survey at a later time to finish it.