Transcript of February 2021 Admin Training Webinar

Laura: Well, happy Friday, everyone. Thank you so much for joining us today. My name is Laura Clark, and I am a customer success manager here at Boardable, as well as a co-founder. And we are happy you've joined us today for this administrator training. Our goal today is to help you know everything you need to know in order to get into your account and start using it as an administrator so you can have it all set up for your board and that you can all get rolling on it. I also have Katie Cordell with me here today. I'll let her say hello.

Katie: Hi, everyone. It's nice to join you today. I'm also a customer success manager here at Boardable. And I see that people are introducing themselves in the chat, so keep that going. We're excited to have you with us today.

Laura: Absolutely. Well, our format for today is we're gonna run through some slides for you. And then we'll jump into the platform and show you everything you need to know there, and then we'll answer questions. And again, if you have questions as we go along, please drop those in the chat. We will be sure to get all of those answered at the end. So, with that, Katie and I are gonna go ahead and turn off our cameras, and we'll get started on our slides.

We do have several trainings coming up that we just wanna make sure that we point out to you. The first is gonna be our Virtual Customer Coffee. It's this next Tuesday, the 9th. And it's just a great opportunity to come and join with some other administrative professionals to talk about how you're using Boardable, and just things that are going to pertain to you as a user of Boardable.

Next is gonna be our New User Webinar, coming up on Friday, February 12th. And that is designed really for those new board members or anyone who is brand new to Boardable who is not an administrator. So, if you have folks that fit that category, you can sign up for it yourself. We'll send a replay out, and you can pass that on to them. Or you can pass on the signup for that to them, and let them sign up.

And then finally, we'll have an Advanced Admin Training coming up on Friday, February 26th. And that really is an opportunity for us to dive a little deeper into each of the areas in the platform. Today, we really are just able to do kind of a high overview for you, just with our time constraints. But with that advanced one, we're gonna dive a little deeper into some of those areas. So, all of those you can sign up for on the Boardable Academy. And I will show you where that is as we move along today.

Katie: Yes, so we have three main types of plans here at Boardable. The first and newest is our Grassroots plan. This is a great option for our young organizations maybe who are just getting started, or who are very small. You have up to 10 users on your account, and you do have some limits on your storage. But it does allow you to start those at first steps for getting your board organized and meeting remotely.

The middle plan is our Essentials option. This is one of our most popular plans here. You're able to have everything that's included within Grassroots, as well as setting and tracking one goal for your organization, and exporting your data from the previous three months.

Finally, we have our Professional plan, which is really for those organizations ready to take their board to the next level. You have a dedicated support person, and advanced tools, for the most professional board experience. Within this plan, you also have unlimited features in terms of goal tracking, and the reports can be downloaded for the lifetime of your account.

We do have a couple exciting feature updates for you as you're getting started. The first is our Board Member Training page. So, as you go through today's webinar, we're also going to be encouraging you to share the Board Member Training page with your new board members. It's a great resource for getting them up and running quickly. We also have in product updates that have recently launched, including our enhanced board packet quick print. So if you have the Professional plan, you have access to that feature.

Coming soon, we're really excited about our new and improved desktop app. We have improved calendar integration, which is exciting. And then we'll continue to make enhancements to those features with the Essentials and Professional plans.

Laura: As we get started and start talking about how you set up your platform, we do wanna point out that there are a few things that you'll want to make sure that you pay special attention to as a way to get started successfully. One is you're gonna wanna make sure you upload your logo into your account, to customize it and really give it a branded feeling for your organization. Next, you're gonna set up your groups and committees. Then you're gonna enter your users in the people directory.

Finally, we really wanna encourage you to talk about Boardable as often as possible to your board members and to your staff in your organization. Make them aware of it, why you're using it, and really make sure to share with them all of the details about how you're going to roll it out to your organization, so everyone's on board and knows exactly what you're talking about. Finally, we want you to send those welcome invites to everyone, so that they can set up their account. All of these tips that I've talked about, we will go over those in the platform, but just wanna make sure to point them out.

Also, too, you'll find, as you get to know the platform, that we do have several different user permission levels. The first is going to be Members. And Members are gonna be able to create meetings, polls, discussions, they can upload documents. And they'll be able to view everything that they are invited to or that is a part of their assigned group. It's really probably what most of the users in your platform are going to be.

Next is gonna be Administrators, and Administrators are what you are, and you can see and do everything in the platform. So, you can access all of the billing information, you can change your plan type, you're able to add people, delete people, set up all of your account settings. You're able to really do absolutely everything within the account.

Next is gonna be Observers, and that's the most limited permission level. They are gonna be able to see and do everything that they're invited to, however, they will never see the Document Center in the platform, and we'll point that out as well, once we get into the platform.

There are a couple additional user permissions as well. One is gonna be a Group Administrator, and there's also a Meeting Collaborator. And an important thing to note about both of these, these are permissions that you can add to a Member permission level.

So, for example, if someone is assigned a Member, yet, you can also decide that you'd like to make them a Group Administrator. And what that does is it gives them admin rights within a particular group. They're able to remove members from the group, they can make edits, publish polls, and meetings, and materials, everything they would need to do as a part of that group. This often can make a lot of sense for someone who might be your chair of a particular group, or a secretary who's always going to need to get in to take minutes.

The other option is a Meeting Collaborator. Meeting Collaborator allows someone to have additional privileges for a specific meeting. So they're able to come in and help set up that meeting, by creating the agenda, uploading documents, taking minutes. But they can't fundamentally change the meeting details. And it is only specific to that particular meeting.

If you ever need help when you're in the platform, you're always welcome to go to our Help Center. We'll be sure to point that out in the platform and how you can access it. You also can visit our Boardable Academy page. And again, we'll point that out in the platform as well. But that's got a lot of great tutorials and information. It's also gonna have those links to sign up for all the webinars for the trainings. You can also access our live Chat Support in-product, and we'll show you that as well once we're in there. And finally, you can always reach out to support@boardable.com at any time.

Now we're gonna go ahead and jump into the platform, and start walking through the different parts of it.

Katie: Thanks, Laura. I am seeing that some folks are introducing themselves, and we have a wide range. So, one of the things that we want to know about you, as we're getting started, is how long have you been using Boardable? So, I just published a poll that just has a quick answer that you can let us know kind of what your experience is with the platform, kind of helps us make sure that we are meeting your needs during this webinar.

Perfect. I am seeing those answers come in now. So, gonna give you just a couple more seconds to respond. Okay, and it looks like most of our users have been with us here at Boardable for less than a month. So, welcome. We're glad to have you. And we do have a couple users who are, maybe are veterans that have been with us for over three months and over six months. So, always welcome to come and join us for a refresher today as well.

And then the second question I want to ask today is what features are you most excited about? So, we have all sorts of different features that we'll walk through on our platform, and we are just most curious about what things you're using and what things you wanna learn more about today. We've listed the most common ones here, but if there are things that you're not seeing, you can type those into the chat so we can make sure to address those at the end of the webinar.

Perfect. It looks like most people are interested in all things meeting. So, scheduling, agenda building, building out minutes, which are definitely areas that we'll cover today. Thanks, everyone. I am going to go ahead and get us started in the platform. So, you should be seeing my screen right now. So, within Boardable, this is the screen that you'll see right away. This is your dashboard.

Laura: Katie, I'm not seeing your screen.

Katie: Oh, thank you. Thanks. It would not be a webinar without some excitement.

Laura: Here we go.

Katie: Here we go. Thank you. So, this is what Boardable looks like when you first log in. Hopefully, it looks fairly familiar. I'm going to start us today by talking about our account settings. So, if you ever need to make any adjustments to your account, for example, if you get an updated logo, you can go here to the left-hand. It's in that bottom left-hand corner, where you see the gears, and select Settings.

Within the account settings, this is a feature that's only available to our account administrators, you can include a dashboard message. Everyone will see this as they log in that first time, so I always recommend making it friendly, and making it sound like it's coming from your organization.

The option right beneath that is Organization Info. So, this is where you'll update your organization name and the email address. That's how emails will appear when they come from your
Boardable account. You also have the ability to upload your logo here as well.

Under User Settings, this is where you can update your time zone. And note that this is the time zone for your account, so this should probably be the time zone where your organization is based. And we'll show you how to update your individual user time zones as well today.

From account settings, that's just a brief overview. I'm going to show you the My Groups feature. So, My Groups allows you to see the groups that you've been invited to. All of your members are going to be able to access their own individual lists from the My Groups page.

Directly below that, we have our [People directory](). People directory is where you will want to go to add new users to your account. So, you can see this as an evergreen directory of all the seats that you have available within Boardable.

If you ever need to add someone, I know that we just started 2021, and maybe that's when you add new board and committee members, you can do that by selecting Add Someone here on the right-hand side of the page. It's the plus sign. Really simple to add someone within the Boardable platform. All you need is a first name and a last name. I'll use myself as a guinea pig today, and type in my email address.

So just first name, last name, and then you can choose your user's account role. Member is our most common account role, which will be most of your users. This allows them to view all the information for the groups they've been invited to. They can create meetings, polls, new discussions, they can upload documents, and view all the group activity.

The Administrators, typically that's about one to three people on an account. Administrators are going to be able to update account settings, add new users to your Boardable account, as well as change your billing information. And our final account role is the Observer role, which allows people to participate in groups, discussions, and polls.

I can then select a group that I want to be a part of today. So, today, I'm part of two groups. I'm on the board and I'm also on the executive planning committee. And I'm going to hit Submit. When I do that, you'll notice that we have a little icon here in the bottom right-hand corner saying that new users are not going to receive an email until you decide to send them that update. So I can select Send Invitation here, or on the right-hand side, I can go and edit a profile.

If I select the edit a profile option, one of the features I wanna point out within editing profile are the Notifications. That's about halfway down the tabs here. Your Notifications is going to update the email frequency when folks receive emails from Boardable. So, Immediate means that they will receive a notification to their inbox as soon as something is posted and they're tagged in a discussion, invited to an event, asked to respond to a poll.

Periodic is our digest version. So, they'll receive that in the morning and the evening, an update about what's been going on in their account. They have a final option called Do Not Send Email Notifications. I always recommend if you have users who are not receiving emails from Boardable, check with them and ask if they have maybe accidentally selected this option. You have the ability to update folks' email frequency on their behalf, but they can also make these changes from their own account.

You can also add an additional email address for notification. So if you have board members who have an executive assistant, or maybe their personal email address that they want to be added, this will act like a carbon copy on any emails they receive from Boardable. And then you can make those meeting reminder cadence updates there as well. I'm going to hit Save today, and then take us back to the People directory. I'm not quite ready to invite this person to our Boardable account. So, you'll see that I have the option to send this invitation here. If I select Send, the blue button at the top, it'll tell me who the invitation goes to, as well as a welcome message. So you can hit Send, and send mass invites once you're ready.

Another feature that I really like is the Re-send Unaccepted Invitations option. So, if you have board members who maybe are dragging their feet a little bit, and you wanna give them a nice nudge to log in and set up their portfolio, you can have that Re-send Unaccepted Invites here, and it'll tell you exactly who still needs to respond, and you can select Send at the same time.

The final thing I wanna point out on the People directory is if you have board members who are unable to receive emails, maybe it's going to their spam folder, a nice option is to select them as an individual, and here on the right, select Copy Invite Link. This will be an invite link that you can paste into an email and send it from an email address that you know they receive communication from. Okay, Laura, I'm gonna turn it back over to you to walk us through some other features.

Laura: Great. Let me get my screen going here. So, I'm going to share my screen. You should all be seeing that now. And we are gonna talk about all things meeting. So, it sounds like everyone is really interested in this section, so I will do my best to walk through all parts of it. Again, if you have questions as we go through, please feel free to chat those, and we will be sure to cover all of those at the end.

So, on the left-hand navigation bar, you can just click into that Meetings tab. And you'll have a list of all of your meetings in your account. These are gonna be all of your upcoming published meetings. You'll also be able to access any of your unpublished meetings. There aren't any in this account, but you would be able to see them as a tab up here if you had them. And we'll talk about what that difference is between published and unpublished in just a minute. And you can also access all of your past meetings here on this tab.

When you are ready to create a meeting, you can come over and hit the Add Meeting button. And you have three different options on your New Meeting. If you know your date, you can drop in your date and your time. You also can do Create Multi-day Meetings. This would be if you happen to be having a meeting that takes place on Friday, Saturday and Sunday of a weekend, this would be a way for you to do it.

Next option is gonna be Find A Meeting Date. This is our scheduler tool. So, if you wanna put out several different date options for people to note their availability, so that everyone can see it and then you can choose the date that works best, this is the option you'd wanna use.

Then there's also the Create a Recurring Meeting. And this is gonna be if you have, for example, a meeting that happens on the first Monday of every month, you would be able to come here and set that up. You would choose a starting date, and then your ending date of when you want those set up for, and it will create all those meetings out into the future for you.

But we'll come back today as though we know the meeting date, so we're gonna choose a date next March, drop in a time. We are going to set up a marketing meeting. You can drop in a location if you'd like to, you can drop in a description. And here's where you can choose your remote option, since most of us are remote right now. If you want to use the Boardable video conferencing, you can choose this option. If you'd like to use Zoom or some other type of link, you can choose this and you would be able to drop that URL code in there. For today, we're gonna choose the Boardable video conference.

Next step is you're gonna be able to choose what sort of minutes option you want. We offer a Classic Minutes Maker and our Free-Form Minutes and Notes. The Free-Form Minutes and Notes just allows you a little more flexibility as you're creating your minutes. I would suggest that...I personally like that one better, and you can kind of play around with both of those. And we do have some tutorials as well so you can decide which one you'd prefer.

Next down is you're gonna assign this to the group that you'd like to assign it to. So, we'll assign it to our marketing committee. It goes ahead and drops in those people. I can X out anyone that I would not want to include. I also can add additional users. These would be people who are users on our Boardable account, but they're not a part of this marketing group. I also can add a guest. And this would be someone who happens to be not a user on this account. But you would have the ability to send out to them the notice of the meeting, and also a PDF of the agenda if you'd like to. So, we'll hit Save and Continue, and create this meeting.

Now that it's created, at the top of the page, you're going to see this green, or yellowish box that's telling you that this meeting has not been published. What this means is that the meeting is created, but the only ones who are able to see it within your platform are going to be administrators, or group administrators if it happens to be for that group. What this does is it allows you as an admin to go ahead and get things set up in a meeting and prepared before you push it out to your team.

You have two options when you're ready. You can Publish Calendar Only. When you click that, you can choose who you'd like to send this out to. If we wanna send it out to all of our inviter users, I can select that. I would click Publish. And it's going to send them an email notification letting them know the date and the time, and they're able to start RSVPing and get it on their calendar. They still, when they log in, are gonna be able to only see that this meeting exists, and they're gonna be able to RSVP, but they're not gonna be able to access this meeting page yet until you publish it fully.

Once you have set up your agenda, uploaded all of your documents, and have it ready for your team, you can go ahead and hit Publish Full Meeting. I can drop in a message that might say "please read board book." I'm gonna choose who I wanna send this to. I'm gonna say I want it to go to all my invited users. I could, again, drop down and choose just specific individuals if I wanted to. I'm gonna hit Publish. And it's gonna send them an email notification letting them know that the meeting has been published, and they'll be able to see my note saying, "please read the board book." At that time when they come into the platform, they're going to be able to access this meeting page, so they would be able to access the agenda and the documents that have been uploaded to it.

Now, let's take a look at the Meeting page, and then we'll walk through building an agenda, and show you what that is like. So, on the Meeting page, you're gonna have all the information at the top about date and time. Your users are going to be able to add this to their calendar from here if they'd like to. Up here, they would just simply drop it on their calendar. Below is going to be if they want to integrate or sync their calendar with Boardable. They also can RSVP up here if they've not already done so from the email that was sent to them, or they could have done it on their dashboard page.

Also, too, is this is where the link is going to sit for either the Boardable video conference call, or it could be for your Zoom call, or whatever you entered into that URL spot. Below that, you're gonna see an area where you can create a poll for your meeting, you're gonna see Documents area, Tasks. Finally, at the bottom, you're gonna see all the people who have been added to this meeting. Across, you're gonna start seeing their RSVPs populate here. You as an admin can mark RSVPs for users if you need to. You also would be able to take attendance here during a meeting.

This Collaborator field, as we talked about earlier, this is that area where you're able to give someone collaborator rights for a particular meeting, where they're able to come in, they can help you set up the agenda, add documents. They're also able to publish the meeting if they need to. Then down here at the bottom is going to be Comments. If anyone wants to leave a comment, they're able to do that. They also can choose directly who that would go to. But, for example, if I wanted to say that I'm running late, I could drop that in here, add that comment, everyone's going to see that here.

All right, let's come back up here and let's talk about the area on the right-hand side. This is gonna be an administrator navigation bar over on the right. You're gonna be able to drop into Edit Your Meeting Information if you need to change a date or a time or who's invited. Here's where you can build that agenda. So if we wanna build an agenda, we can click into that page. You have two options. You can start from scratch or you can start with a template. I think it's easier to start with a template and then just tweak it as I'd want to from there.

So, if I start with a template...I'll choose this one. It's gonna populate that for me. And then I'm able to go through and change it however I'd like to. So, let's say for at the top, I want this to say Call to Order. I can select who is going to be responsible for that. I can give it a time duration, drop in a description if I'd like to. And here's where I can upload documents to my agenda. So, if I wanna upload a document to this area of the agenda, I can click Upload Document. It's going to open up my Finder. I can choose a particular document that I'd like to upload. So, if I want to upload this particular document, I can do that here. Once it's uploaded, I would hit Save, and I've created that section of the agenda.

Let's see, we wanna do another area. Again, you can change this out, and we're gonna drop in our budget report. I can again assign who's responsible for this, give it a time duration, a description. And again, I can pull a document from the Document Center or from my computer. This one, we're gonna pull one from our Document Center. We're gonna pull a couple. We'll attach those. And we'll click Save.

So, I've created my agenda. Once I have it like I'd like it, I can come back up if I want to and save this as a template. That way, next time I come in, it's gonna be a little bit easier for me to start creating my meeting agenda next time. We'll go back to our Meeting page, and you'll see that on the Meeting page, the agenda now sits there, as well as all of the documents that were a part of that agenda.

When your users come into this Meeting page, they can open up the agenda if they'd like to. They can click Open Agenda. It's gonna open that up for them. They also, too, are able to take notes here if they'd like to take notes. They're personal to them, but they would be saved. So that is a nice option for those board members.

You can also open it as a PDF. And for our Professional plans, you do have the ability to build a board packet. If you choose this option, you would just click Board Packet, and it's going to generate. It might take a minute. In fact, this one might take a minute because I did upload a big one, with the webinar deck. But it's gonna convert that into a large PDF that will have the agenda at the top, and all of the documents in the order in which they appear within the agenda below it. Then, once that's created, your board members, when they come into the platform, are gonna be able to access that board packet if they'd want to, or, you could download it and email it out to them.

But here's that board packet. You'll notice the little checks across from each document let you know that it's been uploaded and it's all good. We can hit Open All, and it's gonna open up that board packet, and you'll see all of those documents below. You're seeing our deck for today's webinar. But the whole thing is gonna be right there, and your users can scroll through that board book.

All right. The next area down, once you've created that agenda, the document area becomes Supplemental Documents. And what this is for is if you want to upload any documents that are associated with that meeting but not a part of the agenda, you are welcome to do that here in the Supplemental Documents area. Just know that those are not gonna be brought into the board packet if you are planning to use that.

If you'd like to take a poll in a meeting, you can do that here by clicking [Add a Poll]. We often see this done to approve minutes, so we're gonna do one here for "Vote on minutes." We're gonna give answer options, yes and no. I can add additional answer options as well. You can give them multiple. You can say whether they can choose one or multiple answers.

Then below that, I'm gonna be able to decide do I want them to have to verify their identity? And that would mean they have to enter their password in order to cast their vote, or do I want them to just be able to vote without doing that? Do I want the votes to be kept anonymous? Today, we're gonna say we do. I also can choose if I wanna be notified as the poll owner when all responses are received.

For polls, you do need to give them a due date, so we will give this a due date and a time. This poll, we created from that marketing committee meeting, so it's going to go ahead and assign all those who were invited to the meeting. I can add additional individuals if I want to. I click Save, and it creates the poll.

Just like a meeting, you do have to publish a poll. So, once I've created it here, I often find if you want to use a poll during a meeting and you don't want your board to have access to the poll until the actual meeting starts, as an admin, I would suggest that you create the poll. Then right when the meeting starts, you can come in and hit Publish Poll. You can send out a notification if you want to, but you don't have to. I then can hit Publish, and that makes the poll live so that people can start voting. I'm assigned to this poll, so it's asking me to vote so, I can go ahead and submit my vote. And those answers are going to start populating here.

We can head back to our Meeting page, and you'll see where this poll sits on the Meeting page. So, it's right here. All right. Other things on the Meeting page, the next down is going to be this task area that we've not talked about. Tasks are designed so that you can assign tasks or to-dos to your meeting members. So, if you want to add a task, you can do that here. We'd say, let's say "Get new sponsor." I would select a due date of when that is going to be due by. And then I can decide, do I want to give it to the entire committee, or do I want to just assign it to a certain individual?

Today, we're just gonna assign it to a certain individual. I would click Save, and it creates that task. Now, Samantha is going to be notified via email that she's been assigned a task. Once she has completed it, she's able to click it off. And it's going to be noted that it's been completed, and as an admin, you're gonna be able to see that. Those are gonna be our tasks.

Okay, let's come back up here to the right navigation bar and talk about a few other things. When you're ready to take minutes, you can do that here under the Take Minutes. Important to note that in order to use our minutes maker, you do have to first build your agenda within Boardable. So, I would click Take Minutes.

And I do have the option do I wanna start from the agenda template, or do I want to start from scratch? I'm going to choose that template. So it's gonna auto-populate the template of the agenda that we just created. Gonna open that up. And here you can see my agenda. I'm able now to come in and start adding things. I'm gonna click on this little plus right here. I have the options here to drop in any of these fields.

I'm gonna go ahead and drop in our meeting information. So, that's bringing in my organization's logo, it's bringing in the basic date and time and those types of things of the meeting. I can then click into each area and start taking my notes. I would also be able to come into an area and say, for example, we made a decision on something. I can choose a decision, and drop in what that decision is.

We can record a vote. If I wanted to vote on the budget here, I could drop in this votes area, and it's gonna populate everyone's name who is a part of this meeting, and I can come in and start noting their votes in this area. I would encourage you all to come in and play around a little bit with the minutes. It takes maybe just a minute or two for you to really get the hang of it. But it's a very simple thing to do once you know how it works. And it really is a great way to take your minutes.

So, we'll go back to our meeting page. Takes just a minute. And here we are on our meeting page. You can always pop back in to edit those minutes if you'd like to, and you'll see that the minutes now sit on the meeting page, and you can open those up. You can also open them up as a PDF if you want to download them.

Next down is gonna be this Send Message option. This is a great thing for you to be able to send out a message to your team. If you need to send something to them, or, it's also a great spot if you've invited guests to your meeting and you would like to send them the agenda as a PDF, you can do that here. You can drop in a message. And below that, you're gonna see where I can choose do I wanna send everyone, do I want to send just to my invited users? I also could choose specific individuals that I would be sending this to. I'd be able to send that out and they will receive an email notification.

You can create a follow-up meeting if you'd like to, by clicking here, and that's gonna pull the agenda from this meeting to the next meeting so they're associated. It's also going to assign the same people to that meeting.

We also have the Public Page option. If you need to share your agenda publicly, this allows you to do that. So, you would be able to enable your public page meeting page. You can choose which parts you want to include with that. I'm gonna include all of these. I can click Save. I'm gonna copy this URL. I open another window, and drop that in. When that opens, you're going to see the agenda. So, your public would be able to access the agenda. They are not gonna have access to the documents that are associated with this meeting, but they would have access to the agenda and all the parts of the meeting that I assigned, so the minutes would also be available here.

Okay, we'll hop back to our meeting page. And then I think the next thing that we need to cover in our meetings is our Boardable video conferencing. And I just wanna take a minute to show you what that's like if you are choosing to use that option. To access it, it's gonna be right here in this box.

And our Boardable video conferencing is still in beta. It's a new tool for us. So, currently, we are capping it at 15 users. That is going to change those soon. So, very exciting. Katie and I were both on a call today where we got to experience what the new experience is going to be like, and it's gonna be great. And so, we're very excited for that to come very soon. But in the meantime, would love for you to give it a try.

You can click into it. You do need to be on a Chrome browser. You also need to be either on a laptop or PC for it to work. You can't do dial in, you can't do a tablet for the moment. But you'll see the agenda for the meeting is going to be over here on the left. You can scroll through the agenda, you can pop into a particular document here. I would be able to open that up. I could choose to present this document to all the other members. Whoops, I forgot one important step. Let me come back to that real quickly.

The Join Meeting, right here. So, when you come to this page, you're going to hit Join Meeting. All your users will do that. And all the users will populate over here on the right-hand side. They also have the ability to switch up, just like you do in Zoom or Google Meet, how you're viewing them, whether it's grid view or tiles, however you want to view them.

But back to here, you're gonna see that document is sitting there. If I want to present that document, I can hit Present. For all my other viewers on this call, they would see that document right here in the middle of the page. Once I'm done presenting, I'd hit Stop Presenting. I can go back, and that opens the agenda back up. If you have a really long agenda, you can even collapse sections of the agenda, so you can really keep on track of where you are in your meeting. That's gonna be our Boardable video conferencing.

We do have, too, a little spot here, if anyone's having any connectivity issues when they're trying to join the Boardable video conferencing, you can always hit our diagnostic tool, and it will help you determine what might be the issue.

Those are the pieces and parts to our meetings. Again, I know I went through it quickly, and so, really if you have any questions, please be sure to let us know. But with that, I am gonna turn it back over to Katie and let her talk to you about our Document Center.

Katie: Thanks, Laura. I am going back to sharing my screen now. So, I've navigated us to the Document Center, which is directly below the Meetings on the left-hand taskbar. Within the Document Center, this is really your repository, or your library of documents for your organization.

By selecting New, you have the ability to create folders and upload files directly from your computer. Within the Document Center, you can create subfolders, so you could have a folder that was for your finance committee. And then within the finance committee, you'd be able to create your 2020 records, your 2019 folder, going back as far as you need to go.

One of the features I really like about the Document Center is that you can also link files. So, if you are already used to sharing files through Google Drive, Dropbox, or Onedrive, you can create live links back to those original documents, so your board members are going to be able to access them. You can see our folders here have been organized alongside our committees. I think that's a great best practice in terms of keeping that information available for the members of your organization.

Our marketing committee folder here, which is the third folder down, has a little padlock next to it. That's in red, and that just notes that this is visible to only a select group of individuals. So, if you select the three dots, you can make edits, and change your marketing committee folder visibility. So, you can see that it's limited. I can easily change that to "Everyone" if everyone needs access. So, if you have board members who have sensitive documents or information that they're sharing, this is a great tool to ensure that only the appropriate eyes are viewing it.

The Document Center is a great resource within our Essentials and Professional plan, so you do have unlimited file storage within the Document Center. And as Laura mentioned earlier, you can link all your files from the Document Center directly to your meetings or group pages as well.

Within the Professional plan, you also have the ability for eSignatures. So, if your members are meeting remotely, but they still need to sign important information, maybe approve the minutes, the eSignature feature is a wonderful tool for your group. And we can share more information about that at the end of the webinar if you're interested.

Some high-level features I just wanna point out briefly are Discussions, Polls, and Tasks. Discussions are great for keeping your board members engaged between meetings. So, the Discussions, much like it features within the meeting, can be a tool for your board members to talk to one another, respond to comments directly from their email, and they can give updates on drafts of documents, or other discussions between those meetings. Great way to keep them engaged, especially as we're meeting remotely.

Directly underneath Discussions we also have Polls. It works very similar to how the polling would work within a meeting, just another place to access this. Here on the polling page, I can see all the polls that I have been invited to. Here are my open polls, as well as the dates. And I have created polls, but I never published it, so I'm able to see that as well. Great way to keep track and keep organized of all your polling activity.

Below Polls we have Tasks. Very similar, this is a way for you as the administrator on the account to view all tasks that have been assigned to your members, so you can easily track what things are still open or incomplete, and what things have been completed. So, you can see here on the top of our task list, Jeff still needs to talk to five people about volunteering. And he was supposed to have done that by January 10th, so he is almost a month behind on that task. We should probably follow up with him.

Two features I think are really neat and really have been rolled out recently are Reports and Goals features. As we mentioned at the top of the session, Reports and Goals are available within our Essentials and Professional plans. So, within the Essentials Plan, you are able to pull reports from the past 90 days for your account, so you can track things like your member attendance, by going to the Member Reports Section. Or the Meetings Report will allow you to download agendas and any attachments from those meetings, as well as tracking your polls and the status of your goals. A really nice way to get a snapshot of the activity within your account, as well as easily downloading those minutes and agendas, if you need them for reporting purposes at the end of the year or end of the quarter.

The final section is our Goals section. Within the Essentials plan, you have the ability to create one goal for your organization. Within the Professional plan, you can create multiple goals. Goals are a wonderful way to help your groups and committees really work towards a common outcome. So, within the goaling, you can have the ability to track a numerical goal. So, we need to recruit 20 new volunteers under our volunteer recruitment. Or you can also track a monetary goal, so, we need to raise $50,000 for our capital fund. We also have a way to track percentage goals. So if you want to make sure that 100% of your board members are giving, you're able to track that as well, and track progress.

Finally, as we're navigating on the left-hand side here, we get back to our organizational Settings, the Subscription, and the Notification History, which will allow you to make any billing updates, as well as track to make sure that your members are receiving notifications.

As you are learning Boardable, and I'm sure questions will be coming up, two resources I really wanna point out are the Help Center. That has helpful articles just about the features. So, if you say "Hey, how do I create a goal?" the Help Center is a really wonderful place to find a step-by-step guide for how to do that. The Academy is going to allow you to have access to help videos, getting started guides, best practices, a really helpful tool, just as you are rolling it out to your [inaudible 00:45:11] organization.

Finally, I always wanna mention the Support Chat. It's going to be in the bottom right-hand corner. It's a friendly blue icon. And that is available from 9 to 5 Eastern time. So, it is a live person. If I select the button, you can see that I can start a conversation just by selecting "Send us a message." And I can type in whatever my question is, and I'll get a response. Great way to stay connected and get those quick easy answers when you need them. And speaking of questions that folks may have, I imagine we probably have some questions [crosstalk 00:45:49].

Laura: We do. Perfect segue, Katie. All right, I did see some questions come in. Let's see, the first one that I'm seeing is, "Can the documents attached to the agenda be accessed via the agenda by clicking on it?" And absolutely. Let's see, Katie, would you mind heading to a Meeting page, that Marketing, February 23rd? Yeah, that would be great.

Katie: Let's go back to our original marketing meeting.

Laura: And you can definitely open up...they would be able to open the agenda either in a tab or in a PDF, and they would be able to click on those documents and access them. I'm looking to see, while we're doing that, if we have other questions about the meeting area while we're in that section. I did see, "When you're recording votes in the minutes, is there an option to delete people in the meeting who are non-voting?" In the minutes...that's a good question. I'm not sure if you can actually delete a person from that list that's going to populate within your page. However, I do know that there is a note section for each person's name, so you could easily write in that note section "nonvoting member."

All right. Let's see, I did see a couple questions regarding Boardable video...meetings with video. And that the meeting's going to beyond 15 users, and looking for a date for that. I do not know an exact date for that. We don't know that yet. We wanna make sure that it is working really well before we turn it out and let everyone use it. So, our engineers are working hard on it right now, so hopefully, very soon we'll have that out. Stay tuned. We'll definitely let you know when we get there.

I did also see about "Can we limit downloading and printing options?" No, you can't. You're not gonna be able to do that. When they open a document, they're gonna have access to downloading that if they wanted to.

Katie: Yeah, and just as a best practice, if that's something that you're worried about, my recommendation is to add those attachments within the Document Center or directly within the meeting. That way, you can limit exactly who has access to view and potentially download those documents. Not a perfect solution, but a good work-around nonetheless.

Laura: Absolutely. I also saw one about adding a video to show during a board meeting. It would depend on the size of a video. Typically, I think most videos...correct me if I'm wrong, Katie, if your experience is otherwise, but I think typically, they're too large to upload directly to the platform. So what I would suggest is that you upload it to, like, a shared drive, a Google Drive or Dropbox, or Onedrive, and then you can store that link on your meeting page, and you would be able to access it that way.

Katie: Yeah, I definitely think that that is the best solution. And you can share that link directly on your meeting page, which is a nice way to do that. We do have a limit on our file size that can be uploaded. So, you are able to upload as many documents as you can think of, but those documents do need to be under 250 megabytes. And your board members will probably thank you for the smaller documents as well.

Laura: All right. I feel like maybe we've answered all of our questions so far. Have you seen any others come in, Katie, that we're missing?

Katie: Not that I've seen, but we can stay live for a little while, just to get those last-minute ideas in as people are coming and thinking of things. I just wanna say that before I forget, if you do have questions that you think of as soon as we go offline, you can always email us at support@boardable.com. And that's a nice way to get a hold of a person and get your answers via email as well, if they're outside of that support chat hour.

Laura: Absolutely. Another thing, too, that I just happened to think, you may have done this already and I forgot. But, popped into the Boardable Academy page, and just showed them what that looks like. This really is a great resource, especially for new admins. It is...whoops, we lost your screen, Katie.

Katie: Oh, yes, [crosstalk 00:50:55.428].

Laura: Okay, you're back. So, it's going to...you can access it from the left-hand navigation bar in your account. It's gonna take you right here. You can scroll down and see video tutorials over each area of the platform. They're short, quick tutorials that you can watch on them. And then below that, you're gonna find our upcoming training webinars, and you can click directly from those to sign up for them.

And then below that, we have a few other kind of things that you would be able to access. Our upcoming Customer Coffee. And then sometimes... Do we have any e-books on this right now? I'm not sure. Yep, here we go. Some additional resources. One of them that I did wanna point out is that complete rollout guide there. That can be a great one for new admins, and it does also include a template email for you to potentially send out to your board in advance of sending that welcome invite. Just gives them some idea about what Boardable is, what they need to look for, things to help them get started.

Katie: Great. I love the Boardable Academy. I think it's a wonderful resource, especially as you're rolling things out. Since we had such an interest in meetings today, I also wanted to point out our Meeting Minute Guide on the Boardable Academy page, that provides you with templates, so you can quickly get up-to-date and get those meetings out after you...get your minutes out, excuse me, after your meetings.

Laura: Yes. The other thing, too, that just, before we part, I wanna make sure to mention is that we do love to get feedback about our product. So, as you're going through and getting to know it, and start really digging in with it, please let us know if you have any suggestions on things you think would make it better. We love to hear that from those that are really out there in the trenches using it every day. You make it better. I can't promise every suggestion will end up in the platform, but I will say a lot of our, pretty much, most of all of our enhancements have come directly from suggestions from our customers.

All right, well, I don't see any other questions. So, again, always feel free to reach out to us. We are here to help you. We're excited that you're now a part of the Boardable family, and we wish you luck as you're in there getting things going for your team. So, thanks so much for joining us, and have a great weekend.

Katie: Thanks, everyone.