

## BoardMax **Getting Started**

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MONMOUTH  
UNIVERSITY

## *BoardMax - Getting Started*

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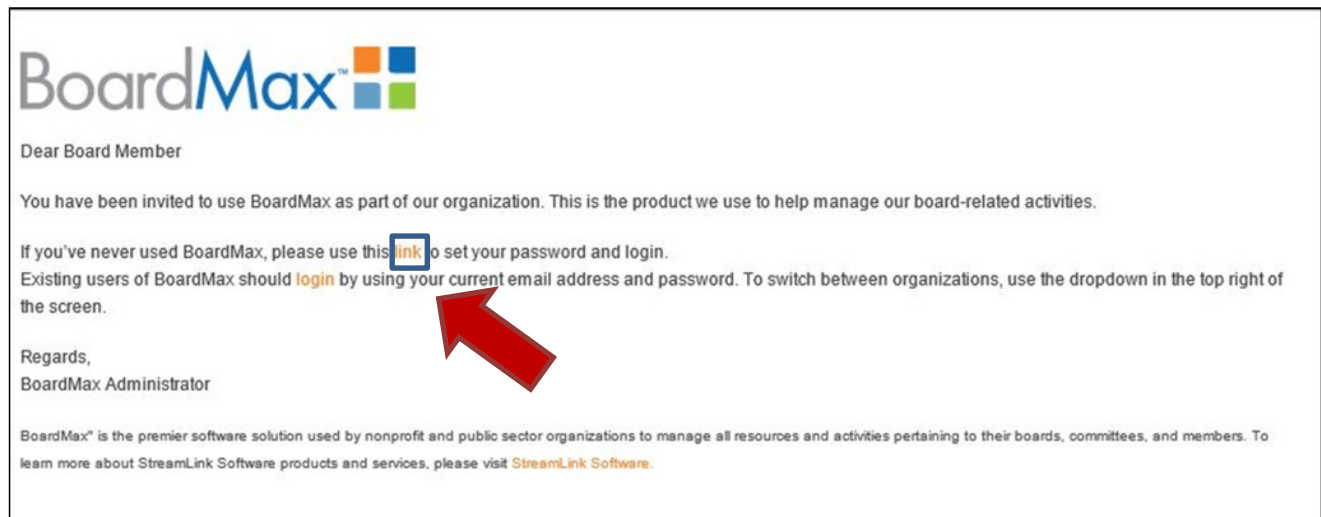
## Logging In to the BoardMax Portal

### Email Invitation to Join BoardMax - RSVP Process

When your BoardMax Administrator is ready to invite you to BoardMax, you will receive an email from [noreply@gotomyboards.com](mailto:noreply@gotomyboards.com). This will contain instructions for how to login.

#### First Login Process:

1. You receive an email and click on the **link**



**IMPORTANT:** The email invitation **expires within 72 hours of receipt**. If you do not receive this email invitation, check your junk mail folder.

2. Create your Password (**minimum of 6 characters**). Select **Submit**.

A screenshot of the "Create Password" form. It has two input fields: "New Password" and "Retype Password". Below the fields are two buttons: "Cancel" and "Submit". A red arrow points to the "Submit" button.

3. Then log in using your **email and password**.

At any time you may reset your password by selecting “***Need your password***” option below the Login button. The email that is sent to you will walk you through the process.



### Log in to BoardMax


Email

Password

☐ Remember Me

[Need your password?](#) [About BoardMax](#)

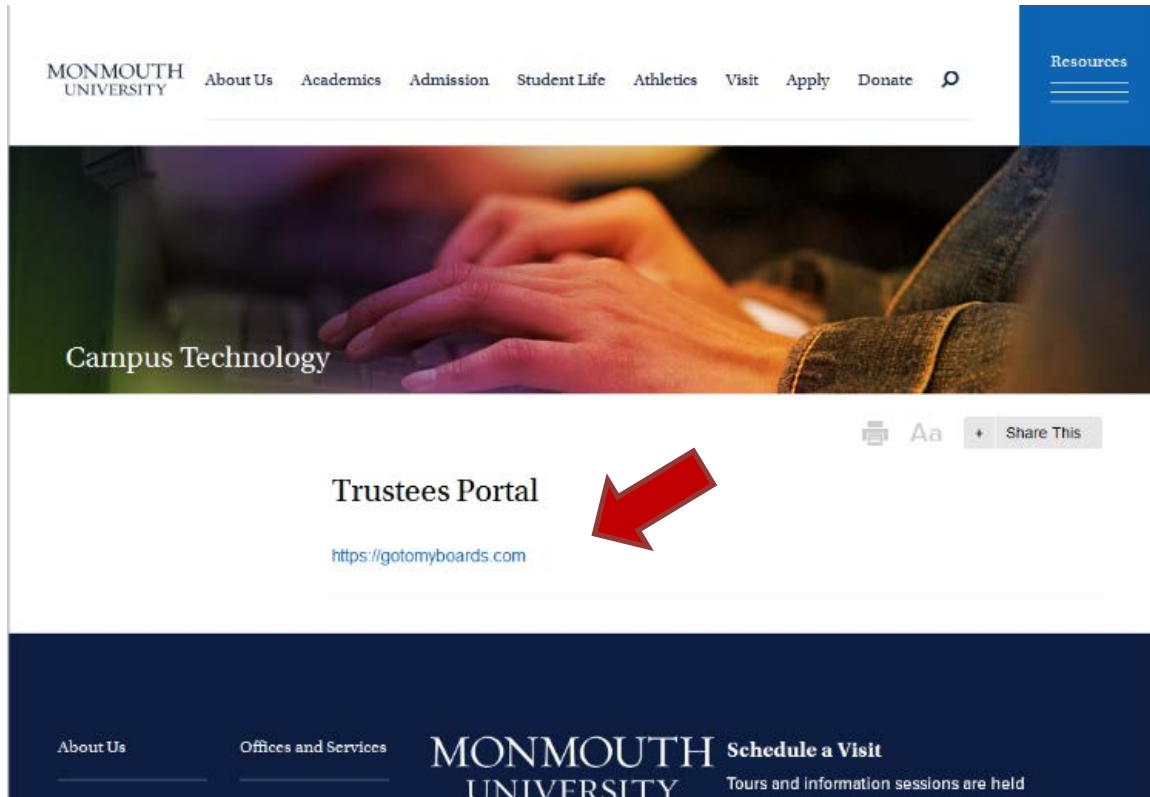


4. Once logged in you will be at the portal landing page or “Tile Page”



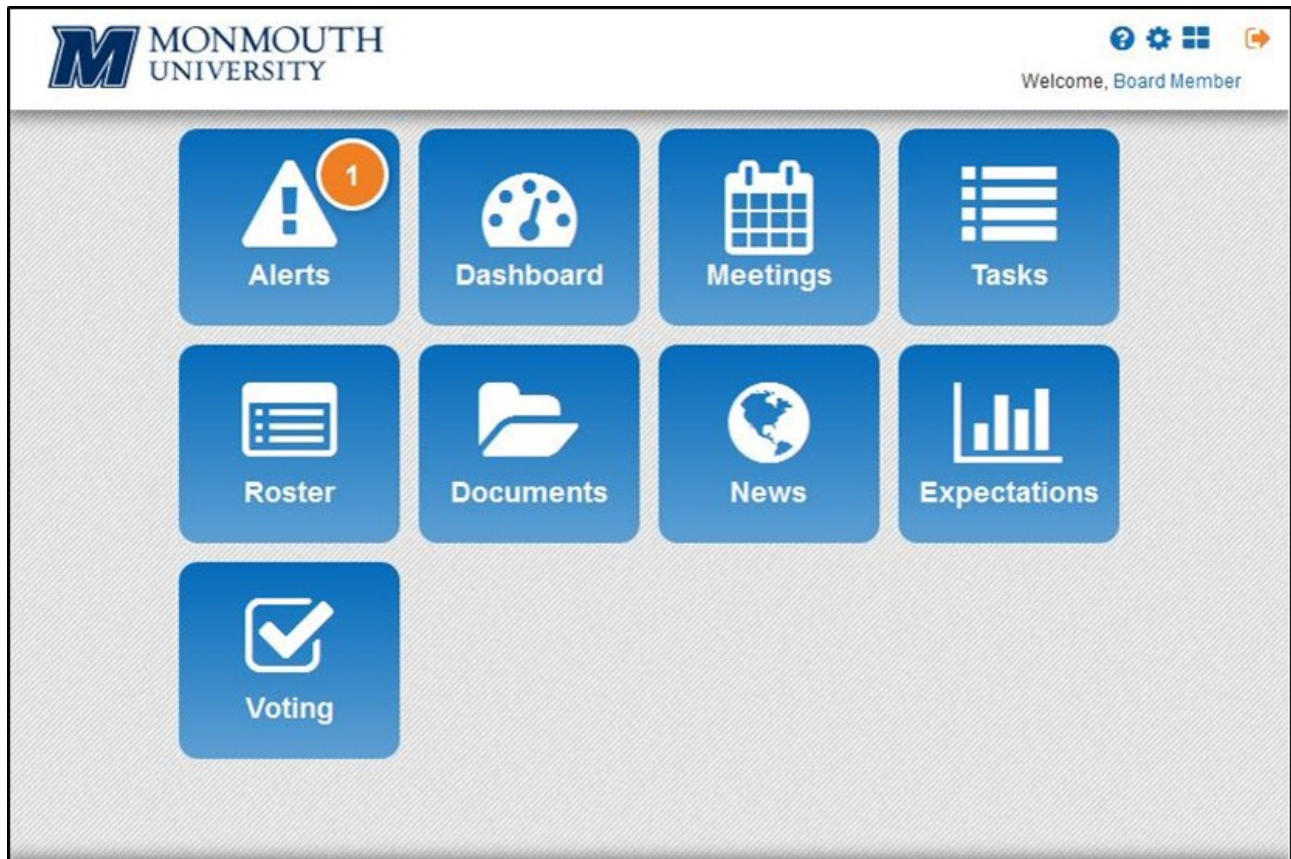
## Future Logins

Once the RSVP process is complete, all future logins can go to **[www.gotomyboards.com](http://www.gotomyboards.com)** or **[board.monmouth.edu](http://board.monmouth.edu)**.

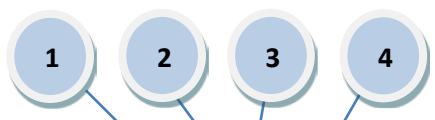


## The Portal Home Page

The portal default home page is the **tile page**. Each tile represents a link to a dedicated area of the portal such as the dashboard, meetings and documents.



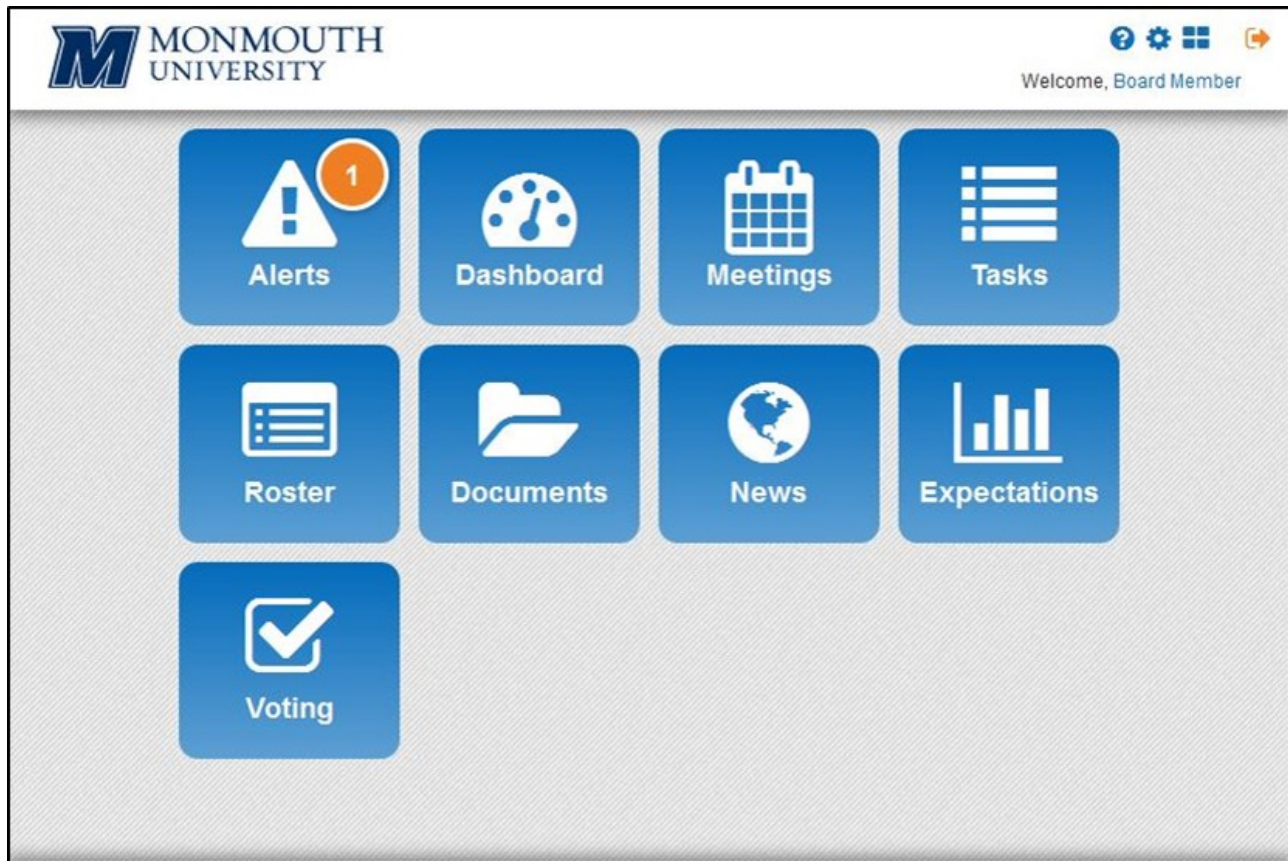
## Navigating the Icons



Icon Number	Description
1	<b>Help</b> – Getting Started Videos
2	<b>Settings</b> - Make changes to your profile and set your default home page screen.
3	<b>Default</b> – Home Screen “Tile Page”
4	<b>Logout</b>



## Navigating the Tiles



**Alerts Tile:** Items that need your attention, not necessarily tasks.

**Dashboard Tile:** Displays your Calendar and Alerts, Meetings, Organization Documents, Recent Documents, News and Metrics. *Click each of the tiles to see more information.*

**Meetings Tile:** Lists all your meetings; *Click meeting titles to view meeting information and Meeting Agenda.*

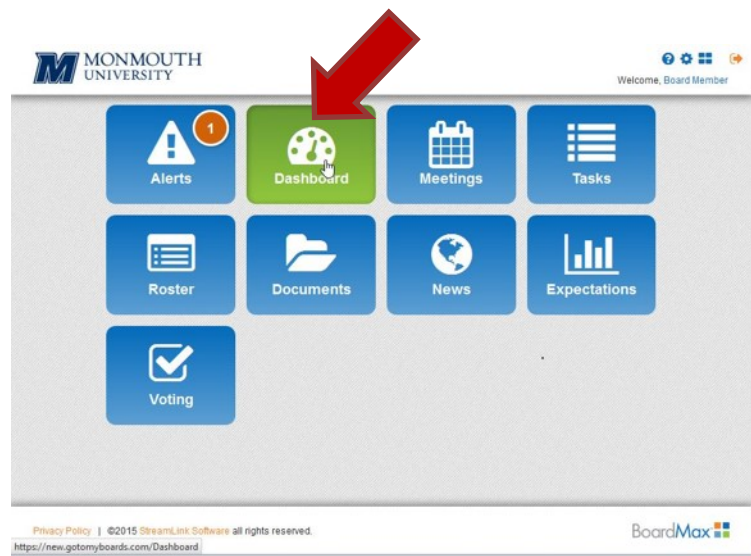
**Tasks Tile:** Lists assignments that have been assigned to you. *(Actionable items)*

**Roster Tile:** Click the group name with which you are associated. View Meetings, Invited Meetings, Members, and access documents.

**Documents Tile:** Has document areas for Board Files, Committee Files, Meeting Files, Organization Files and User Files.

## Dashboard

The **Dashboard Tile** will display your meetings calendar, alerts, documents and news at a glance to review upcoming events.



The **Dashboard** has all upcoming meeting information listed below:

**Meeting Calendar:** See all scheduled meetings in calendar view.

**Alerts:** Meeting RSVP's and updates.

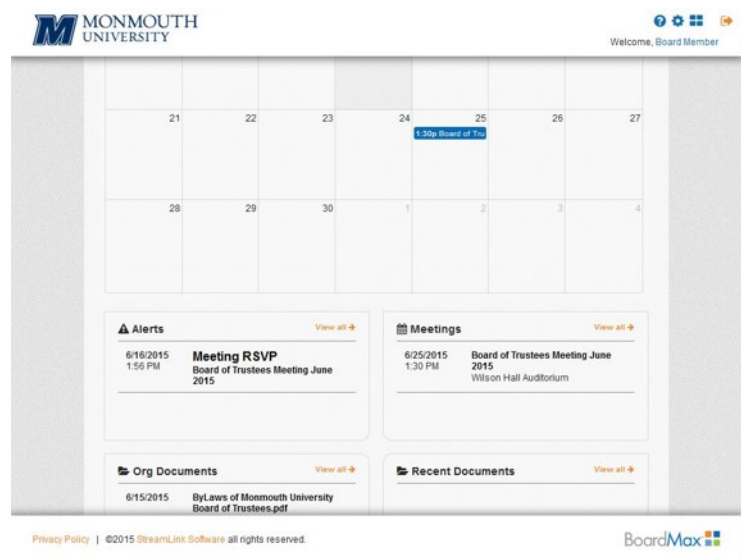
**Meetings:** Upcoming meetings in list view.

**Org Documents:** Documents that are available to all members.

**Recent Documents:** Documents recently viewed.

**News:** Recent news items.

**Metrics:** Campaign updates.





## Meetings

### Meeting Invitation - RSVP Process

When your BoardMax Administrator is ready to invite you to a meeting, you will receive an email as noted below. This will contain meeting/event information including Name, Date, Time and Venue. Please RSVP by selecting **Attending** or **Not Attending** or **Maybe Attending**.



Dear Board Member

You have been invited to attend the following meeting/event.

- Name: Board of Trustees Meeting June 2015
- Date: 6/25/2015
- Time: From 1:30 PM To 4:30 PM Eastern Standard Time
- Venue: Wilson Hall Auditorium



Please RSVP: [Attending](#) or [Not Attending](#) or [Maybe Attending](#)

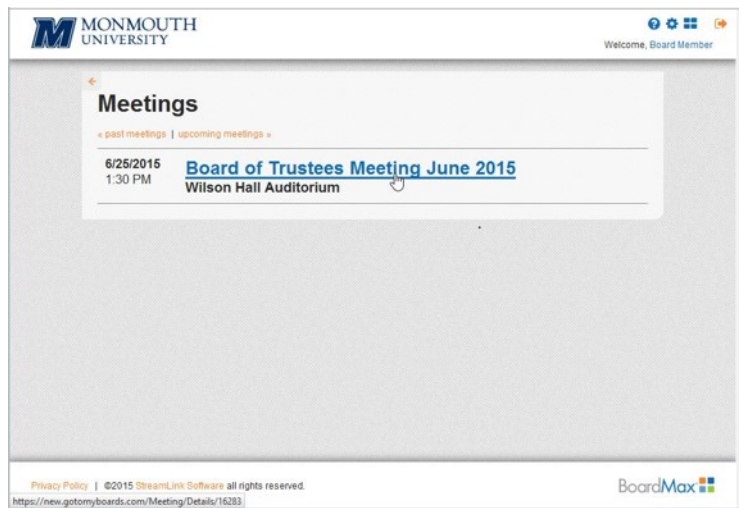
Once you select your RSVP status, you will be able to download a file to add the meeting to your personal calendar.

Regards,  
Monmouth University BoardMax Administrator  
Monmouth University

To view all upcoming and past meetings you can select the **Meetings Tile**.



Click on **Meeting Titles** to view more meeting information and view the **Meeting Agenda**.



## Meeting Agenda

**Quarterly Board Meeting**  
Conference Hall

Date: 11/9/2015 at 9:00 AM to 4:00 PM  
Location: Conference Hall  
Dial-in:

Description: We will conduct the Spring Quarterly Meeting of the Board of Directors.

1 **Meeting Agenda**  
Meeting Packet

2 **Meeting Roster**

3 **Pre-Meeting Material**

4 **Meeting Summary**

Click the **Meeting Packet** link to download/print the PDF version of the packet.

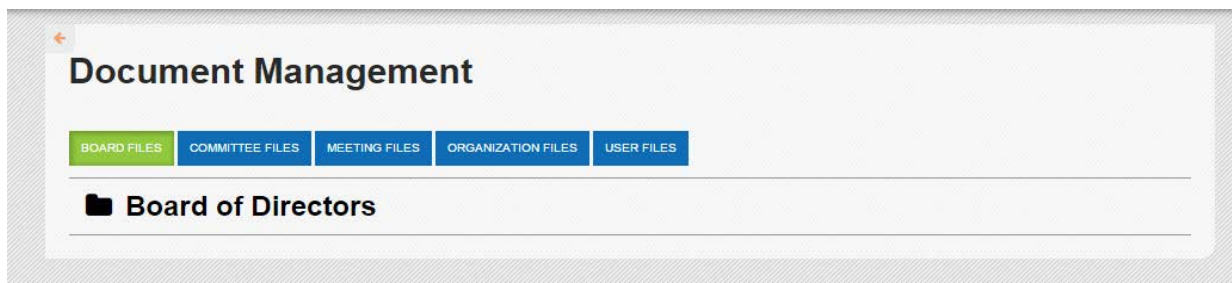
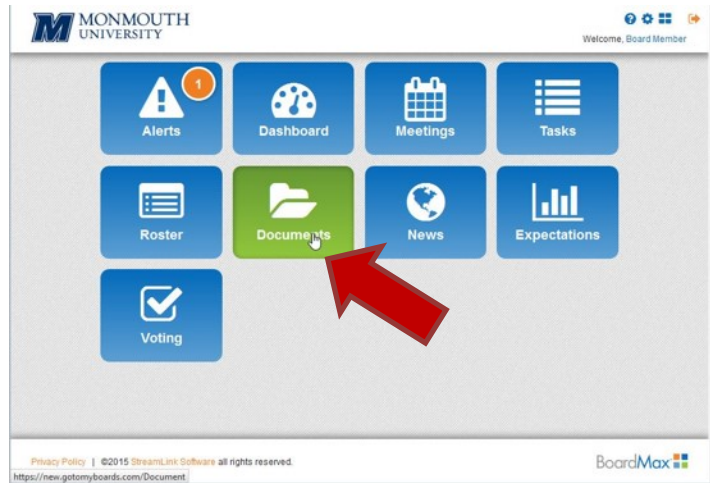
Committee Reports 9:00 to 9:30

1	<b>Meeting Agenda</b> – By default the meeting agenda will have all topics defined in the appropriate sections (Ex: Call to Order, Reports, Action Items) and may also include additional attached files.
2	<b>Meeting Roster</b> – The meeting roster maintains the list of members who have been invited and accepted the meeting.
3	<b>Pre-Meeting Material</b> – Pre-meeting material can be posted to include additional information (Ex: Directions).
4	<b>Meeting Summary</b> - Once the meeting is closed the meeting summary will include attendance, meeting minutes and/or meeting motions.

\*Additionally you are able to download files one at a time and view the Meeting Agenda through the browser.

## Documents

The **Documents Tile** will open the **Document Management** folders.



In regards to **Board/Committee** files, you will see the groups with which you are associated. **Meeting Files** archives meeting materials of the meetings to which you've been invited. **Organization Files** can contain resource and informational documents. Everyone has access to these types of documents (example: Bylaws, Conflict of Interest form). See the **Document Folder Map** below.


## Document Folder Map

Document Folder	Types of Documents	Who Has Access
<b>Board Files</b>	Documents for the Board groups <i>of which you are a member</i> . Examples: Reports, Agendas and Motions.	<b>Board Members</b>
<b>Committee Files</b>	Documents for the Committee groups <i>of which you are a member</i> . Examples: Reports, Budgets.	<b>Committee Members</b>
<b>Meeting Files</b>	Archives meeting materials of the meetings to which you've been invited.	<b>Members Invited to the Meeting</b>
<b>Organization Files</b>	Can contain resource documents. Examples: Bylaws, Conflict of Interest form.	<b>All Members - Everyone has access to these types of documents.</b>
<b>User Files</b>	Can contain <i>your</i> reports and items for <i>your</i> review.	<b>Individual Member Only</b>



## Settings



To change settings and preferences, click  located in the upper right hand corner of the screen. Below is how to make changes to your profile and set your default home page screen.

**Settings**

**Set Homepage**

1 → **Default** | Dashboard | Alerts | Meetings | Roster | Expectations | Tasks | Documents | News

**Email cc Recipient Info** ← 2

Name

Email Address

**Email Preferences** ← 3

☒ Weekly Subscription

☐ Monthly Subscription

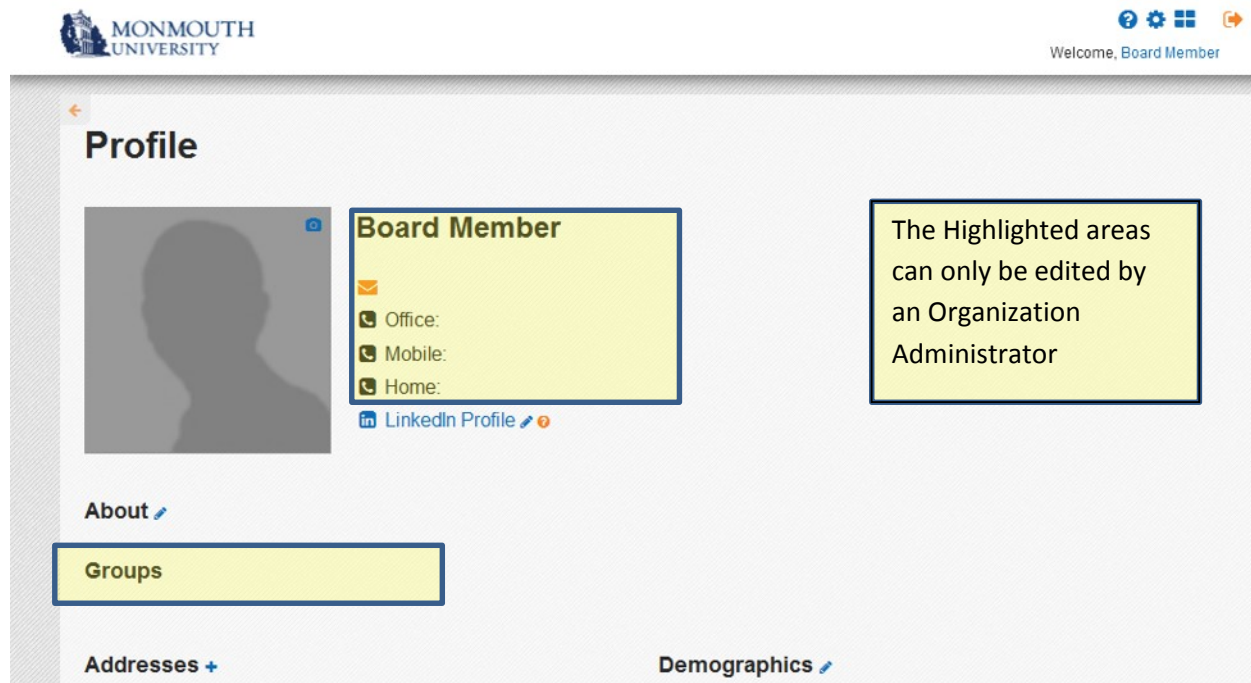
4 → [Edit Profile](#)


[Save](#)

1	<b>Set Homepage</b> – You can select the default Homepage. The default Homepage is the tiles page.
2	<b>Email cc Recipient Info</b> – You can select someone as an email cc (email copy) to receive emails on your behalf. These individuals will only receive email updates and they do not have to be members of the portal.
3	<b>Email Preferences</b> – You can receive an email digest of all updates from the portal. You can choose to receive a weekly or monthly subscription.
4	<b>Edit Profile</b> - To update your profile you can select Edit Profile.


## Editing Your Profile

By selecting edit profile, you can add and update your profile information, such as the **About (Bio)**, **Addresses, Education and Employment History**. Profile information, including your **name, email, and phone numbers**, can only be edited by an **Organization Administrator**.



To **edit** to your profile, you can select the  icon. For example, to edit the **About (Bio)**, select the pencil icon next to **About** as seen below to edit and update the **About (Bio)**.



To **add** to your profile, you can select the  icon. For example, to add a second address, select the plus icon next to **Addresses** as seen below to add and update a second address.

