BoardMax™

Member User Guide

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Getting Started

You will receive and invitation email from your BoardMax Administrator, instructing you to click a link and set your password. Your BoardMax account will require your login information to be your email address and password.

Go to www.gotomyboards.com and enter your email address and password, then click **Login** to go to the default homepage.

General Navigation

BoardMax 4.0 utilizes a tile grid for general navigation. Here we will explain the general layout of common tools from any screen in BoardMax.

Organization Logo

The organization logo displayed in the top left corner of the screen will act as the your home button. Selecting the logo will bring the you back to your default home page.

Members who are part of multiple organizations using BoardMax may use the dropdown menu below your organization's logo to move between organizations. They do not have to maintain multiple logins; all organizations can be accessed by a single login.

Search Field

At the top of every screen is a search field. The search field will search all of your board's meetings, tasks, roster, strategic plans (if available), users, voting (if available), and files (PDFs, Office documents and other text-based files) by default. Click the dropdown arrow to search by a date range and/or search by item type.

The search field will open the Search Results page. On this page, you can refine your search by date range and/or related item type. The search results are grouped by item type. Under Options, you can sort by date and filter by item type. Using the Items and Files button, you can toggle between items entered in BoardMax and files that have been uploaded.

Note: After uploading a file, it may take up to 15 minutes for the file to appear in Search Results.

Icon Row
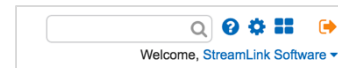
Available in the top right corner of your screen are four icons: ❷ (Help icon), ✿ (Settings icon), ⚏ (Shortcuts icon), and ➡(Logout icon). These icons are available from any page in BoardMax.

- The ❷ (Help icon) connects you to a help library for common questions.
- The ✿ (Settings icon) will take you to the Settings page where you can make quick adjustments to your BoardMax account.
- The ⚏ (Shortcuts icon) will bring you back to the tile grid from any screen.
- The ➡(Logout icon) will log you out from BoardMax.

To return to the previous page, click ← **Back** on the top left corner of BoardMax or use the back button on your browser.

Privacy Policy and StreamLink Software

At the bottom of the screen is a direct link to StreamLink Software's privacy policy. For more information about BoardMax and StreamLink Software, visit the StreamLink Software website.
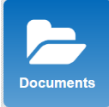
Homepage

Each user can set their default home page from the Settings page via the ⚙ (Settings icon). New BoardMax 4.0 customers are offered the tile grid as their default homepage upon initial login. For migrated BoardMax 4.0 customers, the homepage defaults to the Dashboard similar to the Board wMax 3.5 version.

Tiles

Similar to tabs in previous versions of BoardMax, the tiles take you to different BoardMax functions. Tiles are accessible to all users but functionality and availability may vary depending on user security settings.

Tile	Description
Alerts	New alerts of upcoming meetings, documents to review, notifications
Dashboard	Calendar, alerts, meetings, news, recently viewed documents and metrics
Meetings	Upcoming and recent meetings
Tasks	Tasks assigned to members, staff, and administrators at meetings and RSVP invites; completed tasks will be automatically removed

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Roster	Boards, Committees, and Staff groups, and links to meetings, members and ballots pertaining to each group
Documents	Documents uploaded into BoardMax, except for those in meeting packets
News	Your organization's news
Search	Search your entire BoardMax account, including documents and uploads. Search by category, date range, or uploaded files.

Product Support/Help Site

To submit a question to the Customer Success team, please email support@gotomyboards.com. Any tickets received will be responded to within two hours by a member of the Customer Success team. Alternatively, call our support line at 216-377-5500, dial 2 for support.

If you are having problems with BoardMax, contact your Organization Administrator.

BoardMax Emails

As a member, you will primarily interact with BoardMax through emails. Emails are sent to RSVP to meetings, download and view meeting packets, respond to ballots, and other functions.

RSVP Email
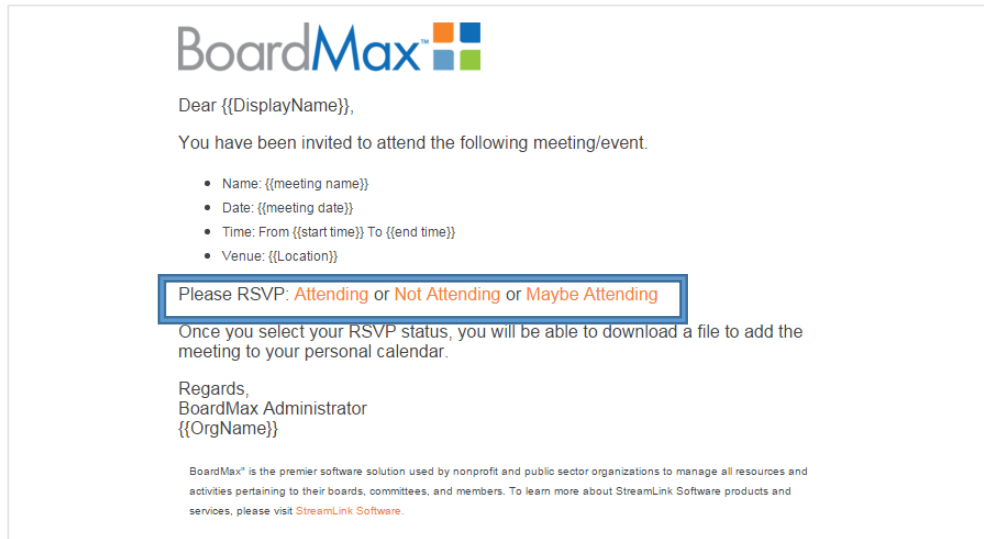
RSVP emails will be sent to members for upcoming meetings. Members can respond to the RSVP directly from the email; they will not be required to log in to BoardMax to respond. Click on one of the RSVP links (**Attending**, **Not Attending**, or **Maybe Attending**) to respond.

Agenda Posted Email
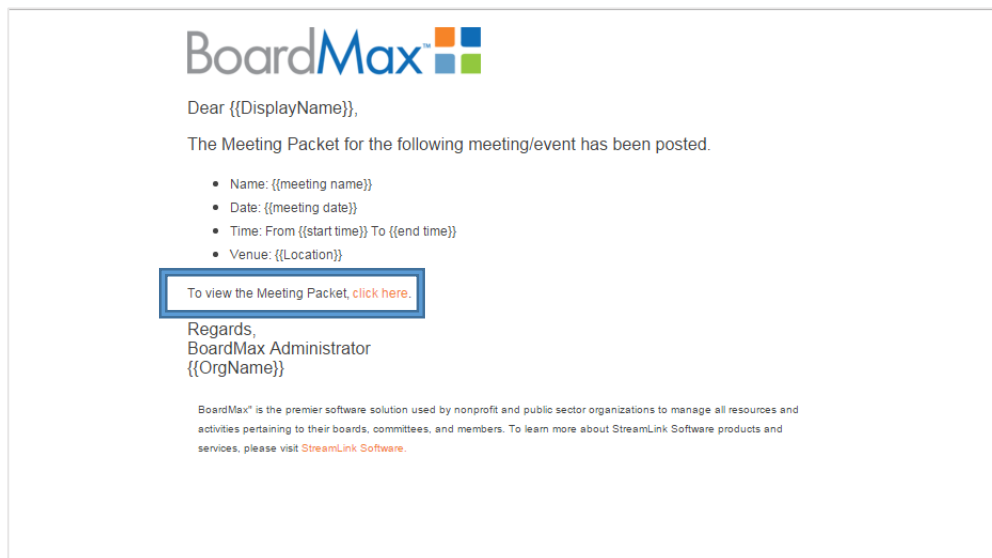
Agenda Posted emails will be sent to members once an Organization Administrator has posted a meeting packet. Click on the link in the email to download a PDF of your upcoming meeting packet.

Meeting Update Email
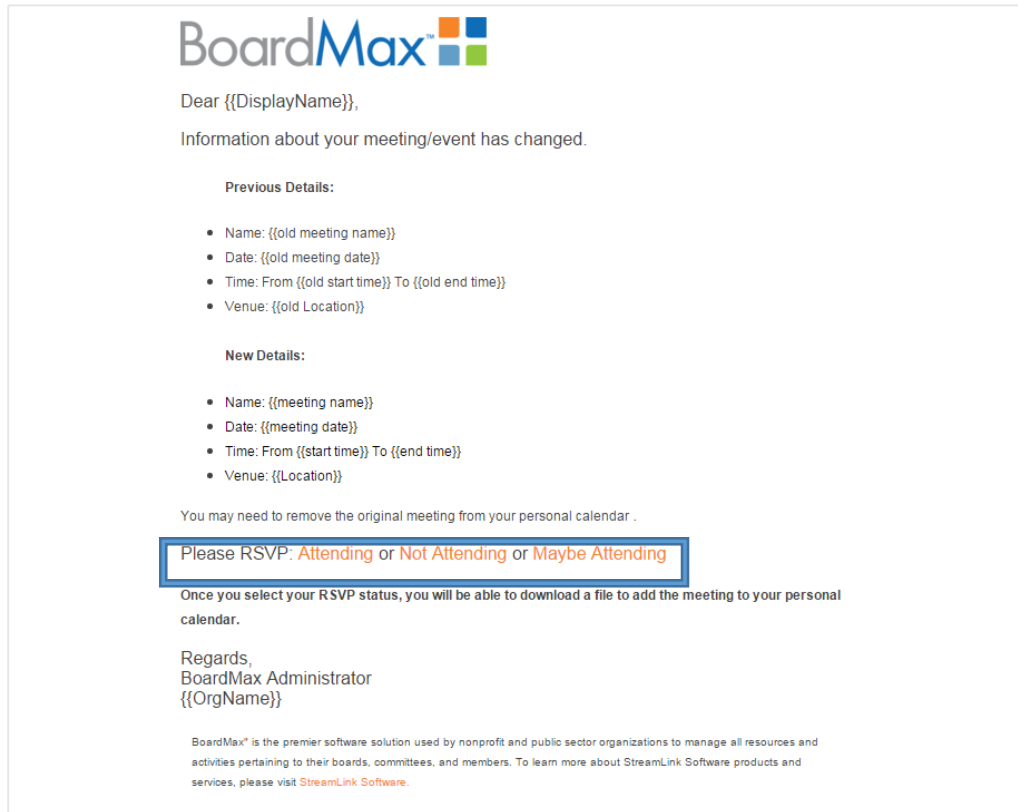
Meeting Update emails are sent to members who have RSVPed when the details of the upcoming meeting has been changed. Members will be given a chance to change their RSVP response based on the new meeting information.

Boards and Committees

All boards and committees can be viewed in the Roster tile. You will only receive notifications from your groups. You can also use the Roster tile to view member profiles and access their contact information.

Meetings

If you a Group Administrator for your boards or committees, you will be able to create and manage meetings for those groups only. An Organization Administrator can set security permissions for users.

Dashboard

The Dashboard displays an overview of each your calendar, documents, and tasks.

Calendar

The Calendar displays a monthly view of your organization's meetings. For Members connected to multiple organizations with BoardMax, using the ⬭ toggle switch in the top right corner will show or hide all organizations' meetings, or only meetings specific to the particular organization that you are logged into. Calendar items are color-coded in green or blue, differentiating between a special event and a board or committee meeting. If you have rights to access meeting details, you may click on the meeting from the calendar to view that meeting's information. Use the arrow buttons in the top left corner to move to different months. All items on the calendar may also be shown on each user's own email calendar.

To sync BoardMax Meetings to your personal calendar:

1. Open **Dashboard**.
2. Click the 📅 **Subscribe** link in the top right corner.
3. In the pop-up window, click the ⬇ **Click to Download Your Calendar and Add Subscription** link to download the calendar.

Note: For online calendars (Google calendars, etc.) copy the provided URL address and paste into your calendar settings to place BoardMax items on your calendar.

Alerts

The Alerts area displays your recent alerts. To access the list of all of your alerts, click the **View All** ➜ link to the right of Alerts. You can also access this list from the Alerts tile.

Meetings

The Meetings area of the Dashboard displays up to five of your upcoming meetings. You may access each meeting's details by clicking on the **meeting name.** To access the list of all of your meetings, click the **View All** ➜ link to the right of Meetings. You can also access this list from the Meetings tile.

Recent Documents

The Recent Documents area will display your most recently accessed documents. To access the list of all of your documents, click the **View All** ➜ link to the right of Recent Documents. You can also access this list from the Documents tile.

News

The News area shows recent News stories. To access the list of all of your organization's News stories, click the **View All** ➜ link to the right of News. You can also access this list from the News tile.

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Metrics

The Metrics area is accessible to all users, and is managed by an Organization Administrator in Preferences.

Tasks

The Tasks tile allows you to view and manage your assigned tasks.

Documents

The Documents tile allows you to manage or retrieve any documents that are viewable to your user role and permissions.

Managing Folders and Documents

There are five types of folders which are system-generated by BoardMax: Board Files, Committee Files, Meeting Files, Organization Files, and User Files.

Viewing files within folders

1. Open **Documents**.
2. Click on a **folder name**.
3. Click on a **file name**.

Adding a subfolder to a pre-existing folder

1. Open **Documents**.
2. Click the ⌴ **(Add Folder icon)** to the right of a folder name.
3. In the pop-up window, add a folder **Name**.
4. Click **Add**.

Adding a file

1. Open **Documents**.
2. Click on the ⧠ **(Add Document icon**) to the right of a folder name.
3. In the pop-up window, add a file **Name**.
4. Click **Choose File** to select a file from your computer.
5. Click **Add**.

Editing a folder

1. Open **Documents**.
2. Click on a **folder/subfolder name**.
3. Click the ✎ **(Edit icon)** to the below the folder name.
4. Edit the **file name** in the Name field.
5. Click **Update**.

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Moving Documents

1. Open **Documents**.
2. Click on a **folder name**.
3. Click the ⬀ **(Move icon)** below a file name.
4. Click the ← **Add Here** link next to the folder you would like to move the file into. You can also select a folder in a different tab. Click ✖ **Cancel Move** to cancel.

User Files

Every user has their own system-generated folder. User Files are accessible only to that user and the Organization Administrator.

News

The News area pulls information from your organization's RSS feed. News also appears your Dashboard.

Alerts

Alerts allows you to manage any items that you need to be notified of in BoardMax. Whenever a you have an outstanding alert, a badge icon will appear on your Alerts tile. Examples of alerts include agenda and meeting notifications. Once an alert has been viewed, the you will no longer see that item on your Alerts list.

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