User Guide

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Welcome to BOARDnetWORK.

BOARDnetWORK is an easy-to-use resource provided by Nonprofits Insurance Alliance (NIA) and made available to you by your nonprofit organization.

This User Guide contains detailed instructions on how to use this powerful tool. Here are three things to know before getting started:

1. The BOARDnetWORK administrator at your nonprofit will register you for access.

2. The system will send you an email with your username and temporary password.

3. You will be prompted to change your password the first time you log in to the system.

How BOARDnetWORK Helps You Stay Informed

Through BOARDnetWORK, your system administrator will post new meeting documents and other informational items. You will receive weekly email announcements about these posts.

Important: To avoid announcements ending up in your junk/spam/quarantine folder, be sure your email account is configured to recognize the BOARDnetWORK domain as an approved sender. Messages will come from BOARDnetWORK [BOARDnetWORK@secure.boardnetwork.org].

How to Log into Your Account

1. Go to www.boardnetwork.org

2. Enter your username and password

If you do not know your username and/or password, contact your BOARDnetWORK Administrator. You can also call the BOARDnetWORK support line at 831-621-6120 or www.boardnetwork.org

If you are affiliated with more than one nonprofit organization that use BOARDnetWORK, you'll have the option to select which account you want to access on the login page. This feature allows you to have one standardized login to access all accounts.

When logging in, you'll see a menu of all linked accounts from which to select.

Once you are logged in, toggle between your accounts by using the "Change Accounts" link at the top of your **Home Page**.
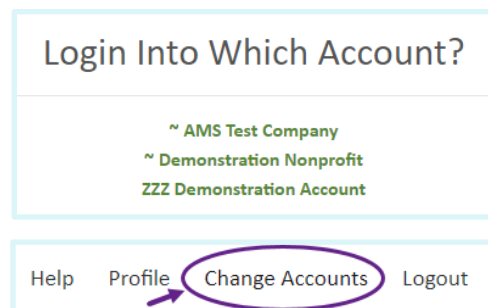
How to Locate Upcoming Meeting Agendas and Documents

Locating upcoming meeting agendas and documents is easy! You have two options.

1. Select an item from the Upcoming Meetings and Events section at the center of the screen on the **Home Page**.

OR

2. Click the **Calendar** tab. From there, you can view your upcoming Meetings and Events.

How to Find Other Important Documents

1. Click the **Documents** tab.

2. Your documents are organized in four document centers:
   Board Documents, Committee Documents, Corporate Documents, and Hot Topics.

3. Click on the name of any folder to explore its contents.

How to Find Other Board Members' Contact Information

Everyone's contact information is available by clicking the **Address Book** tab.
This is also where you can generate an email to an individual or group.

How to Change Your Announcement Options or Contact Information

1. Go to your **Home Page**.

2. Click the "Profile" link at the very top of the page.

3. From here, you can change your password or update your contact information.
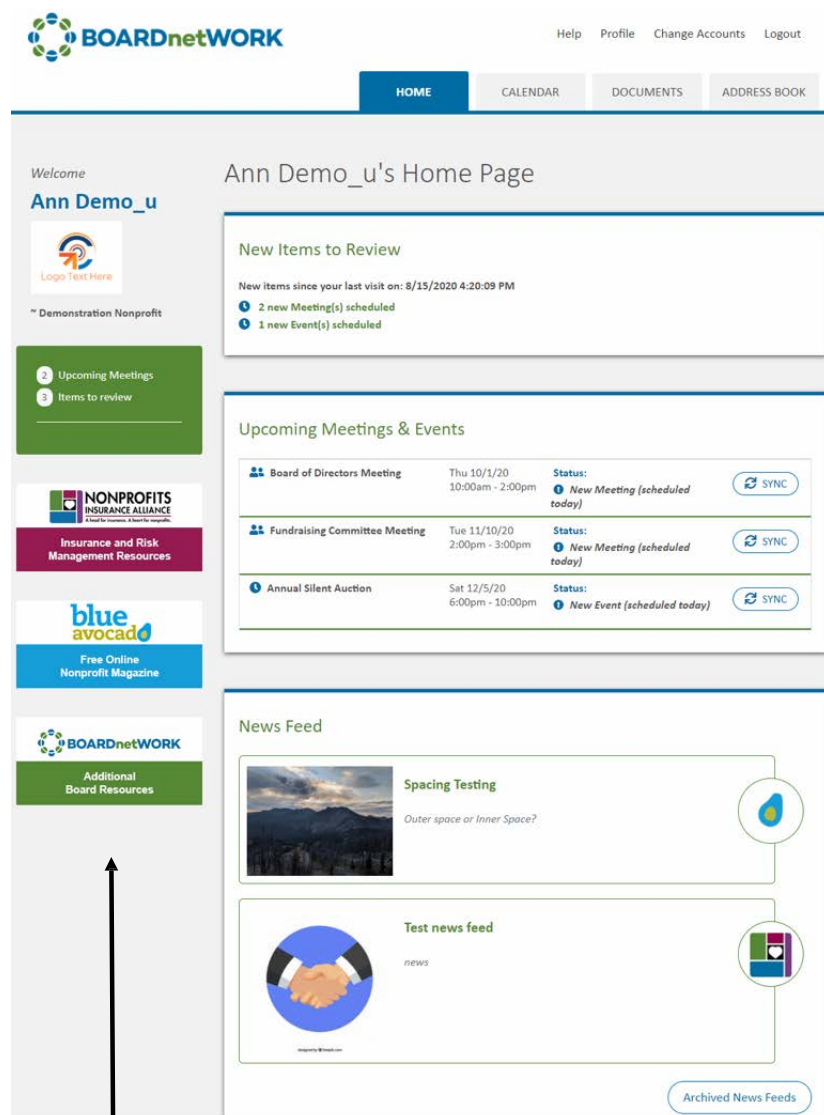
How to Contact Support

BOARDnetWORK Support staff is available from 8:00 a.m. to 5:00 p.m. PT, Monday through Friday.

You can click the "Help" link at the top of the screen to send an email or call 831-621-6120.

BOARDnetWORK

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HOME PAGE

Your **Home Page** presents you with a customized dashboard containing several important elements:

Navigation Tabs

Located at the top, these tabs **[Home, Calendar, Documents, Address Book]** take you to the key areas of the BOARDnetWORK platform.

New Items to Review

This section provides a list of new items that have been added since your last visit to the site. Click each link to visit the area containing the new item.

Upcoming Meetings & Events

This area lists upcoming meetings and events scheduled by your nonprofit in chronological order. You can click the link to go to the item or click the related navigation tab **[Calendar]** at the top of the page.

News Feed

Your news feed features articles and blogs from Nonprofit Insurance Alliance and *Blue Avocado*.

Quick Access Area

This area on the left will be available to you on all pages of the BOARDnetWORK platform. When you are on the **Documents** tab, an **Options** menu will be also be visible.

Print a Page

Each page of the platform has a print icon on the right side of the screen, near the navigation scroll bar. Hover over it to expand the button.
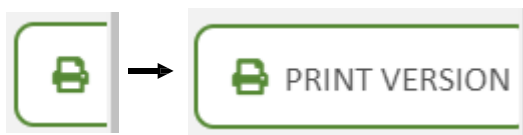
Selecting the View

The **Calendar** tab contains two views:

1. A "List" view showing 12 months at a time

2. The more familiar one-month Calendar view

You can toggle between views by clicking the **One Month** or **12 Months** button.

The 12 Months view defaults to start on the current date.
To change the start date of the 12-month range:

1. Click the **One Month** button.

2. Select the date from which you want the 12-Months view to start.

3. Click the **12 Months** button.

Changing Time Periods

Use the left and right arrow buttons at the top of the calendar to go backward or forward in time.

Syncing Calendar Appointments

To add calendar appointments to your Outlook or other desktop calendaring program, click the **Sync** button on the **Calendar** page or the **Meeting Detail** screen. The system will change the status of synced items automatically.

Note:
The sync feature does not handle updates automatically. If a calendar item changes in BOARDnetWORK, the item must first be deleted from your Outlook and then re-synced from your BOARDnetWORK account.

Board Documents

The Board Documents Center centralizes all documents for the Board of Directors. You can gain convenient access to the most frequently used materials through three built-in folders:

- **The Meeting Documents Folder.** Easy access to archived as well as upcoming documents used in the board meetings.

- **The Minutes Folder.** All meeting minutes, listed by date.

- **The Resolutions Folder.** All board resolutions in one place.

Your BOARDnetWORK administrator(s) may also add customized folders to the Board Documents Center.

Committee Documents

Each committee on which you sit will have a Committee Documents Center similar to that of the Board.

Corporate Documents

The Corporate Documents Center provides you with online access to the most up-to-date corporate records and reference materials.

Hot Topics

This area contains information on news, activities, events, etc., that your nonprofit feels are important to note. Items listed on this tab will be one of the following:

- Document
- Web link
- Text block

Meeting notices and scheduled activities/events for your nonprofit are located on your **Calendar** tab.

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Opening Documents

You have the choice of opening your documents as a PDF or in the format in which the documents are originally created. When you click a document link, a new window will open. At the top of the window is a tool bar. The document format is the first thing listed in this toolbar.
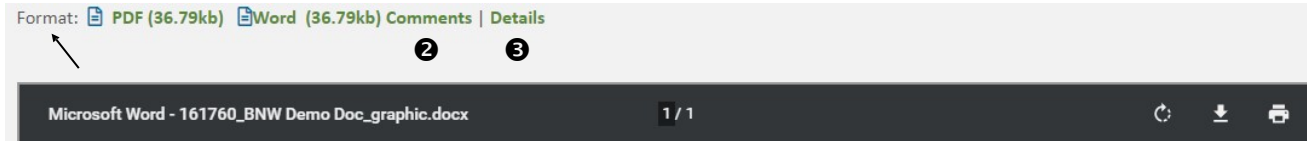
The system default is to open all documents as a PDF. If the document is also available in another format, the format will be shown here. In the example above, the original document was created in Microsoft Word.

Note that the PDF viewer window will only show a portion of the document page. To see the full-page view, you need to click on the link to the right of "Format".

Important: You can work on a document, but to retain any changes you make, you must save the document to your local system/drive. You cannot upload documents back to BOARDnetWORK. Only administrators have the ability to upload documents.

If you are going to work on a document, it is recommended that you use the **Download** button to save the file to your local drive.

Sharing Document Comments

To make comments on a document for the benefit of the Board Secretary or fellow Board members (e.g., to suggest a change to the document or voice your approval/disapproval of an item in the document), click the "Comments" icon after opening the document. (See ❷ above).

The "Comments" icon will then appear next to the document for others to see.

Document Detail

You can view all of the details of a document. Just click on the **Details** button on the document window header bar. (See ❸ above).

Preparing for Meetings

The agenda and documents for upcoming meetings can be viewed, printed, and downloaded from the **Meeting Detail** screen. Click a meeting in the calendar to open this screen.

For your convenience, you can download individual documents or all documents in one PDF (also known as the board book). If your account administrator has created a board book for the meeting, the link will be available to you in the quick access area to the left of the Meeting Agenda.

Archived Meeting Documents

BOARDnetWORK automatically organizes and stores your archived meeting documents, which can be found in two ways:

1. Click the left arrow button in the calendar to go back in time.

OR

2. Go to the **Meeting Documents** subfolder of the Board or Committee Documents Center.

Searching for a Specific Document

On the **Documents** tab, use the "Search" feature to find specific documents in the system.

You can search by keyword or by date to locate recently posted items.

You can also search by "Status of Document" by setting the criterion to "Documents I Have Never Seen."

Options Menu

> **Board Docs**
> **Committee Docs**
> **Corporate Docs**
> **Hot Topics**
> **Search**

Search

Enter one or more search terms to locate documents. Note that content within files is not searchable due to file encryption on the server. Do not use wildcards (*) as your search terms will result in partial-match searches automatically.

Keyword(s) in the Title/Description:

[ ] (Run Search)

Date Uploaded/Revised:

[-any- ⌄]

Status of Document:

[-any- ⌄]

The Address Book contains the contact information for all board and committee members.

Address Book- All Users

Change View:

All Users

✉ **Email this group** 📊 **Export Excel**

Bloomfield, PhD, Dr. Abraham

Position(s) held: Active Committee 1, Board of Directors Visitor, Finance Ann Committee, Personnel Committee Executive Director, Take a bite out of hunger.

Work:

CFO
A Little Piece of Heaven
987 South Street My Town, OH 43298

Contact Info:

Phone: 800-359-6422
Fax: 831-459-0853
Email: a.bloomfield@netzero.net

Davis, Ace

Position(s) held: Active Committee 1, Board of Directors, Finance Ann Committee, Take a bite out of hunger Chair.

Home:

660 B Street Peoria, WY 98732

Contact Info:

Phone: 800-359-6422
Fax: 831-459-0853
Email: aced@pacbell.com

Johnson, Allie

Position(s) held: Active Committee 1 Staff, Board of Directors Staff, Personnel Committee Staff, Take a bite out of hunger Staff.

Work:

Executive Director
Nonprofit Organization
1234 Main Street, Ste 622 Anytown, CA 94761

Contact Info:

Phone: 800-359-6422
Fax: 831-459-0853
Email: allie@nonprofitorg.org

To change the view, select the group you want to see from the drop-down menu.

Emailing Other Users

You can send email to one individual, the entire Board, a Committee, or all BOARDnetWORK users from this screen.

The system will open a new message using your email server and insert the email addresses based on your selection.

To configure your account, access the "Profile" area at the top of your screen.

Changing Your Password

From time to time, and in accordance with any password guidelines issued by your nonprofit, you should create a new password for your account.

Changing Your Roster Information

Update personal contact information in the roster by clicking the "Contact Information" link.

You can specify two addresses for the delivery of your BOARDnetWORK announcements. This enables you to receive notifications at home and work destinations or to have your personal assistant receive notifications on your behalf.

Important: If your board or committee membership information is not correct, please contact your system administrator.

SUPPORT

Receiving support from the BOARDnetWORK Help Desk can be achieved in one of the following ways:

- Click the "Help" link at the top of your screen and fill out the Support Request form
  - Be as specific as you can in the "Support Issue" box.
- Send an email to support@boardnetwork.org.
  - Be sure to include a specific description of your problem, your name and a contact number in case we need to call you.
- Call us at 831-621-6120

Our support team is available Monday through Friday from 8:00 a.m. to 5:00 p.m. PT.

Help & Support

Complete this form to have a BOARDnetWORK Support Representative contact you at the time of your choice, or call support directly at 831-621-6120.

Support is available from 8:00am to 5:00pm (PT) Monday to Friday.

*Fields marked * are required*

*My Name:	*Company:
Ann Shanklin	~ AMS Test Company

How would you like to receive your response?

◉ Email ○ Call

*Email Address:

noemail@insurancefornonprofits.org

*Support Issue:

[ ] I'm not a robot — reCAPTCHA — Privacy - Terms

SUBMIT REQUEST

Handling Lost or Forgotten Passwords

If you've lost for forgotten your password, you have several options:

- On the BOARDnetWORK **Home Page**, click the "Forgotten Password?" link.
  - Enter your username (your email address)
  - The system will send you a new temporary password via email.
- Click the "Contact BOARDnetWORK Support" link and fill out the support request form
- Contact any of your BOARDnetWORK administrators, who can reset your account and issue a new, temporary password.
  - The names of your administrators should have been provided to you by your nonprofit.

Our support team is available Monday through Friday from 8:00 a.m. to 5:00 p.m. PT.

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What are the minimum system requirements to run BOARDnetWORK?

BROWSER

- Chrome—The two latest, released versions
  (The BOARDnetWORK Platform is optimized for best viewing on Google Chrome.)

- Firefox —The two latest, released versions

- Microsoft Edge—The latest two versions of the new Microsoft Edge (Chromium-based)

- Safari—The two latest released versions on macOS (as specified in the OS section below)

OPERATING SYTEM

- Windows and Windows Server—The two latest released versions

- macOS—The two latest major versions

PROGRAMS

- Office 365 or Microsoft Office - The two latest released versions

- Adobe Acrobat Reader - The two latest released versions

Why am I not receiving my BOARDnetWORK weekly notifications and general announcements?

To comply with anti-spam guidelines, BOARDnetWORK uses a modified "return-path" message header that clearly identifies outbound messages as coming from the BOARDnetWORK domain. It is possible that your notifications are going to your junk, spam, or quarantine folder because your email software doesn't recognize the sender. Be sure to add BOARDnetWORK@secure.boardnetwork.org to your approved sender list.

My documents are not opening when I click the link—what's wrong?

If nothing happens when you click the link to open a document, it is most likely because you have a pop-up blocker running inside your browser. The popup blocker must be "told" that it is acceptable for the BOARDnetWORK application to launch pop-ups.

Can I get email notifications at my home email address too?

Yes, you can have a second email address for delivery of your BOARDnetWORK announcements.
See "Changing Your Roster Information" on page 13.

How can I sync my calendar meeting and events with Google Docs?

1. Click the **Sync** button on your calendar item.

2. Use the **Save As** function to save the ICAL file to your desktop or other location.

3. Open your Google Calendar.

4. Next to **Other Calendars** click the drop-down arrow button and select "**Import Calendar**."

5. Click **Choose File** and select the file you saved from BNW → Open.

6. Select the Google Calendar to which you would like to import your event, then click **Import.**

PO Box 8507 • Santa Cruz, CA • 95061-8507
Phone: 800-359-6244 • Fax: 831-459-0853
insurancefornonprofits.org