CU*ANSWERS

Board Sites

Board Member Getting Started Guide

Welcome to the CU*Answers Board Sites where board members connect for meetings and other board activities. Your board site administrator can add board members as users, add content for meetings and maintain a calendar of upcoming meetings. As a board member you will use your site for board meeting preparation and while attending your board meetings.

Your New Site is Ready

You will be invited to join a board member site via email by your site administrator. This will typically be a member of the credit union staff who is assigned to administer the site. The email contains a link which you must click or tap to activate your account.

The first link in the email will show you the site which you will be joining. Click or tap on it if you want to verify the site. The second link will activate your account on the board site. **You must click or tap on the link before you can join and before the administrator can add your board site personal information.**

After clicking the activation link, you will receive another email with your username and password.

Where to Start

What you should do after activating your account

- Log into your account. You will be taken to the Your Profile page.

- Enter your first and last names into the appropriate fields.

- Select the appropriate "display name as" option.

- Enter and verify a new password. **Your password must be at least 7 characters, contain lower case and upper case letters, and contain numbers and symbols.**

- Click on the Update Profile button at the bottom of the screen to save the new information.

Change Your Password

Scroll down and **change your password the first time you log into the site**. Your password must be at least 7 characters and should include upper & lower case letters along with numbers and symbols. A strong password is your defense against bad guys.

How to Change Your Board Site Information

If you need to change your name, email address, password, or board member details, just log into your board site and click or tap on the Profile link in the sidebar. The profile information contains a number of fields so you may need to scroll down to see all of the fields. The Update Profile button at the bottom will save your updated information.

Using Your Board Site

The primary purpose of your board site is to provide a convenient way to distribute digital documents directly to you as a board member. The board site is also used to maintain a calendar of upcoming meetings. It is designed to display nicely on any device – desktop, laptop, tablet or phone. **The site has only three primary navigation options – Home, Resources and Calendar.**

- Board sites require that you log into the site to see the available content. The home page will display a publicly available list of board members.

- The Home page displays a welcome message and a list of board members (optional).

- The Resources page is used to provide a location for documents, audio, video and images that relate to or are relevant for more than one meeting.

- The Calendar page is a list of the 12 months in our calendar. The months are rolling and refer to upcoming months. The months are not used as an historical record of your meetings. To see a Calendar month, just click or tap on the month title.

- Each page displays a sidebar on the right side of the page (bottom of page on small or mobile devices). It contains:

  o A login/logout form which includes a link to the Your Profile page. It also includes a link to Admin and to Login/Logout. The Admin link takes you to the Your Profile page for board members.

  o There is a search function in the sidebar.

  o There are also helpful links in the sidebar, your board site administrator(s) and news about our industry.

I Can't Remember My Password

We're all human. It happens, so here's what you can do. Go to your board site. In the right sidebar is the login form. Right below the Log In button is a Lost Password link. Click or tap it, enter your Username or email address and click on the Get New Password button. You'll receive an email with a link to a form where you can change your password.

Enter your new password in each box. The Strength Indicator will show you if you're using a strong password. A strong password is your best defense against bad guys. **Always use strong passwords. Click on the Reset Password button to reset your password. Once reset, you can log into your board site.**

What's My User Name?

Your user name should be your first name and last name combined without capital letters. For example, if your name is Joe Jones your username should be: joejones. There may be exceptions, so if you do not know your username you may need to contact your board site administrator.

For additional support contact your Board Site Administrator. His or her contact information is posted along the right-hand side of your board site.