

# Diligent Boards for iPad

QUICKSTART Guide v2.0.0



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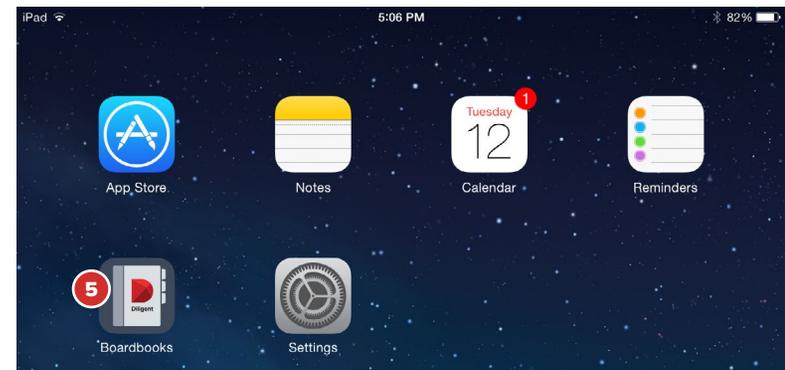
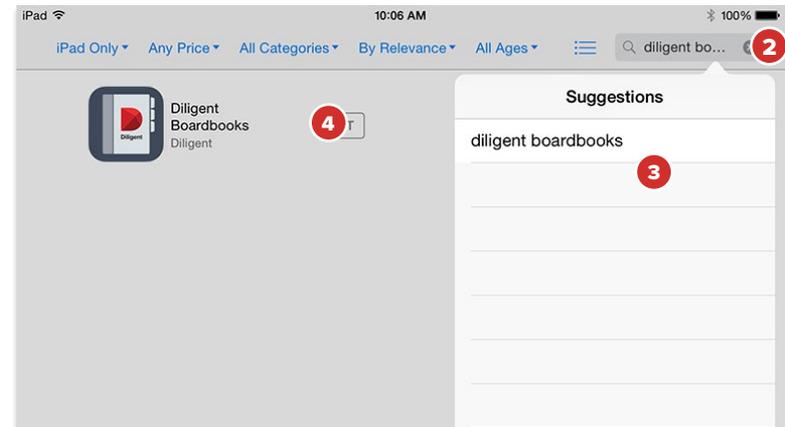
# Installing and Opening the iPad App

- 1 Tap the **App Store** icon on your iPad's Home Screen.
- 2 In the Search field, enter the keywords **Diligent Boardbooks**.
- 3 A list of results will automatically appear. Tap **Diligent Boardbooks** when it appears in this list.
- 4 Tap the **Get** button. The button will change to a green Install button. Tap it again. If you have associated your Apple ID with your iPad, the App Store may prompt you for a password, and then install the iPad App. Otherwise, it will ask you to sign in with or create a new Apple ID before installation.

**Note:** *If you do not have an Apple ID and create a new one at this point, you may have to start the Diligent Boards iPad App installation process over again.*

Press the Home button below the iPad's screen to exit the App Store.

- 5 After installation, the **Boardbooks** App icon will appear. Tap this icon to open the App.



# Installing and Opening the iPad App - Continued

- 6 The first time you launch the App, you will need to enter your board's Diligent Boards site name. Tap on the address field and enter:

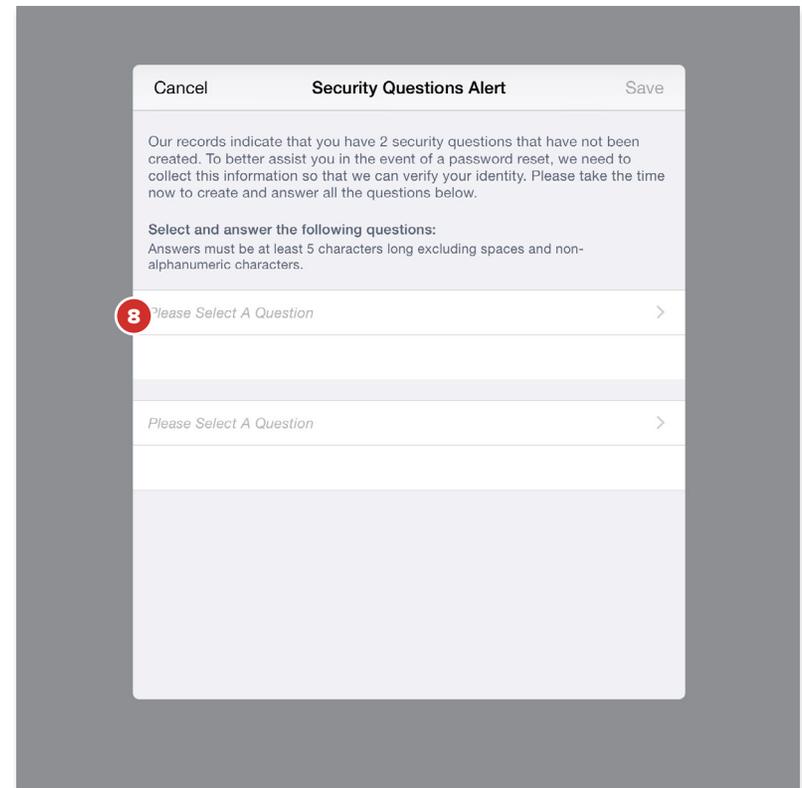
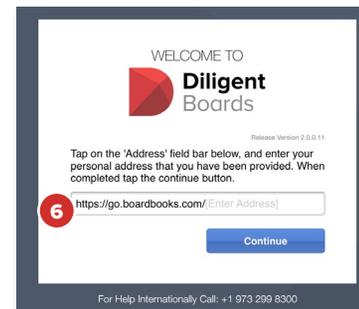
Tap **Continue** to proceed to the Log On screen.

- 7 Enter the username and the case-sensitive password with which you have been provided. Tap **Log On**.

*Note: If you get a notice that your account has not been authorized, call the number listed in the notification.*

- 8 A Security Questions Alert window may appear. Tap **Please Select A Question** everywhere it appears to choose your security questions, then tap below them to respond. Tap **Save** when finished. You can also tap **Cancel** to select and answer these questions later.

*Note: These security questions are used for identification purposes, and are required in the event of a password reset. The Security Questions Alert window will appear every time you log on until you select and respond to all questions.*



# Selecting and Managing Books

The bookshelf list view displays all of your board's current meeting books. From here you can select a book to read, or update a book to its latest version with one tap.

- 1 After logging on, you will be taken to the bookshelf list view. All of your upcoming and recent meeting books are available in this view.

*Note: If you sit on multiple boards, you may be asked to select a board instead. Tap one of your boards to enter the bookshelf list view for that board.*

Tap **Sync Book** to download that book to your iPad. Books that have never been synced are grayed out and must be synced to be viewed.

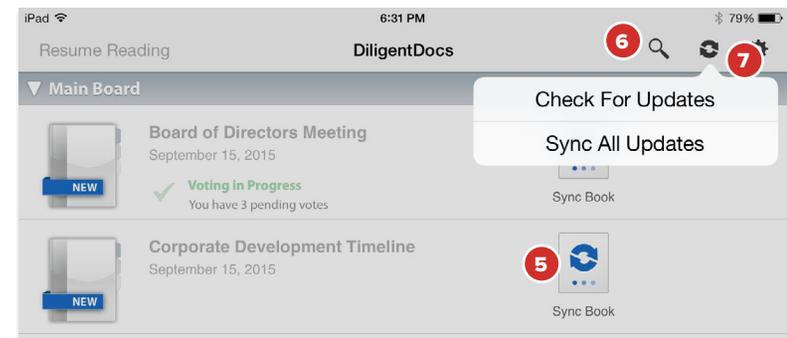
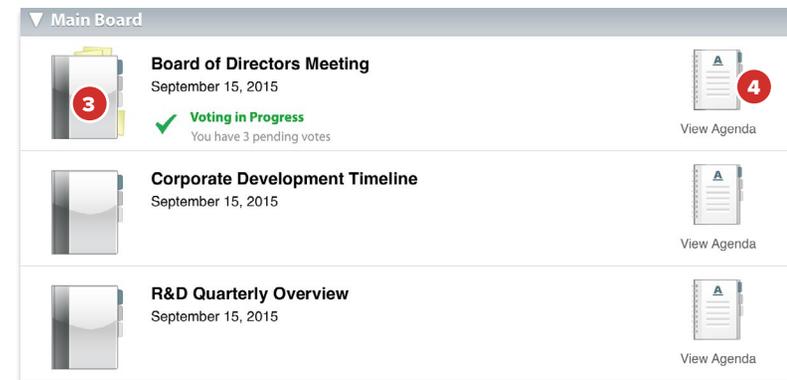
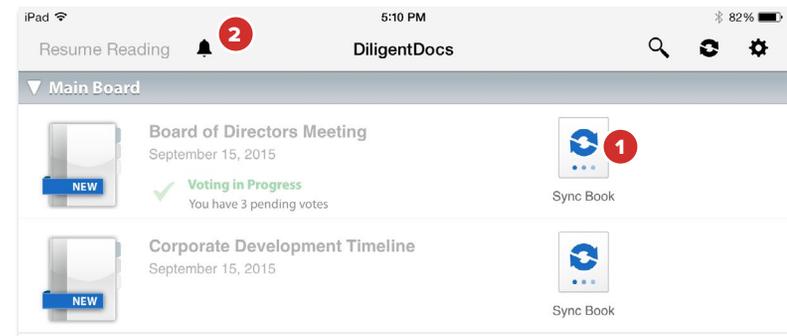


- 2 If your administrator has created an alert message, it will pop up when you log on. To make it reappear at any time, tap the **Bell** icon.
- 3 Tap any book's icon to begin reading it. You can read a book while it syncs in the background.
- 4 Tap the **View Agenda** icon to go directly to that book's agenda page.
- 5 The Diligent Boards iPad App will automatically check for updated versions of your books when you log on. Tap **Sync Book** to download these changes.



*Note: Once a book is synced, it can be read with or without an Internet connection. New and updated books will not appear until a connection is restored.*

- 6 Tap the **Search** icon to reveal the search screen. From this screen, you can search for any word or phrase in a variety of board resource locations.
- 7 For additional sync options, tap the **Sync** icon in the top menu bar. From this menu, you can **Check For Updates** or **Sync All Updates**.



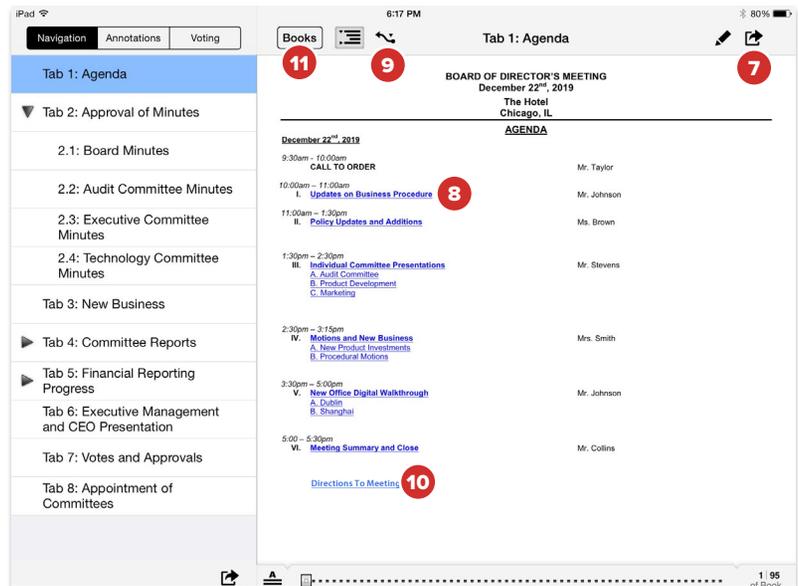
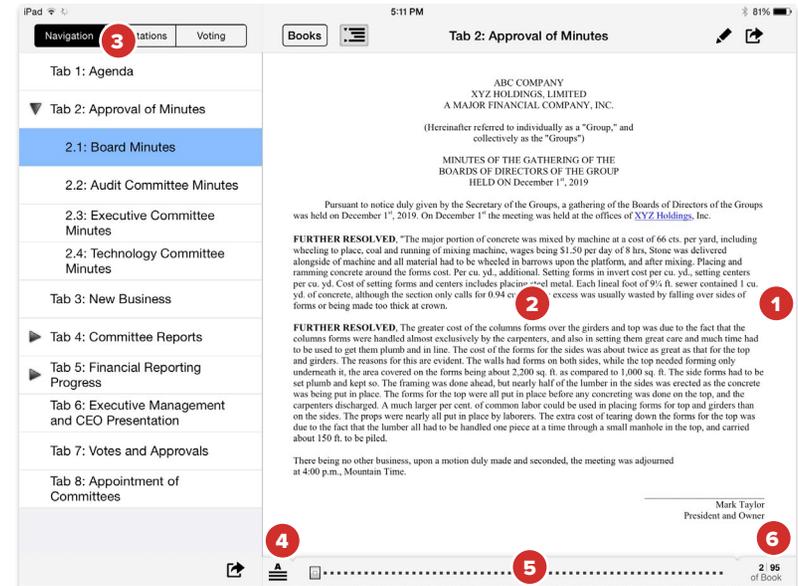
# Reading and Navigating a Book

The page view displays all your book content and includes features for an optimal book reading and navigation experience. To get to the page view, tap any book in the bookshelf list view.

- 1 To turn pages, tap the left or right sides of the screen, or swipe left or right anywhere on the page.
- 2 Tap in the middle of the screen to show or hide the top and bottom menu bars.
- 3 Tap the **Navigation Panel** icon to view a list of sections in the book. Tap a section in this list to move to the first page of that section. Tap the Navigation Panel icon again to hide the list.
- 4 Tap the **Agenda** icon to open the book's agenda. Tap the icon again to return to the last page that was viewed in the book.
- 5 Tap and slide your finger on the page slider to scroll through the book.
- 6 Tap the page number icon to display the keyboard and a field in which a specific page number can be entered. Tap **Go** on the keyboard to go to the entered page.
- 7 Tap the **Print and Email** icon to print or email the book currently being viewed. The book can be printed and emailed in whole or in part.

**Note:** *Print and Email functionality is optional. If this icon does not appear, it has been disabled by your site's Administrator.*

- 8 Tapping on a link will take you to a different section of your board site.
- 9 After you've tapped a link, the **Link History** button will appear. Tap this button to go back to the page that contained the link, or tap and hold the button to see a list of all the page links you've tapped while reading the book.
- 10 Links may also open other apps, such as Maps, Safari and Email. Links to other apps will not appear in Link History.
- 11 Tap the **Books** button to return to the bookshelf list view.



# Creating Annotations

Markup Mode contains several options for easily adding your own annotations to a page, including a pen, highlighter, sticky notes and bookmarks.

1 Tap the **Markup Mode** icon to open the markup toolbar.

*Note: Markup Mode is optional. If this icon does not appear, it has been disabled by your site's Administrator.*

2 Tap the **Highlighter** or **Pen** button to draw markups on the page. Tap the ink drops by each button to change their respective colors, or the line thickness of the pen.

3 Tap the **Navigate** button to turn pages and zoom normally, without marking up the page.

4 Tap the **Erase** button to remove any pen marks or highlights. Tap any mark to erase it. This action cannot be undone.

5 Tap the **Sticky Note** button to create a sticky note on the page. Use the iPad keyboard to enter text. Tap **Save** to keep the note, or tap **Cancel** to delete it.

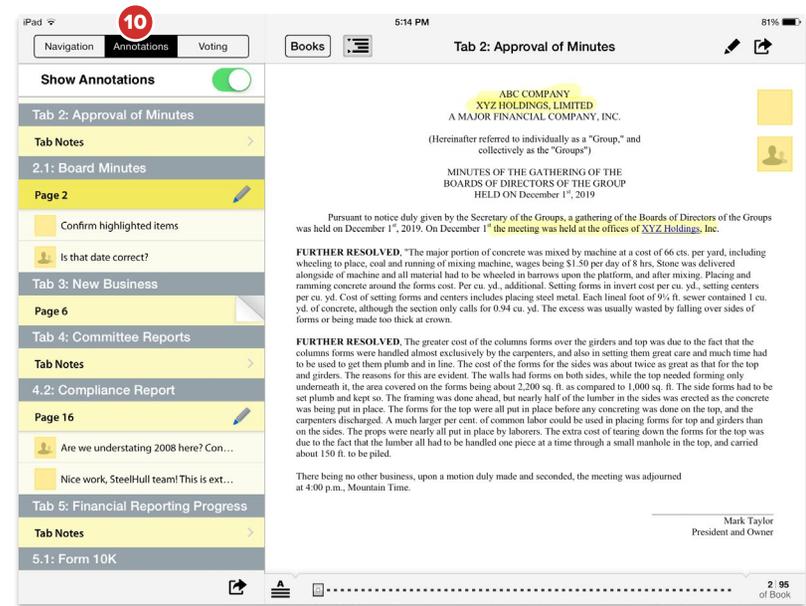
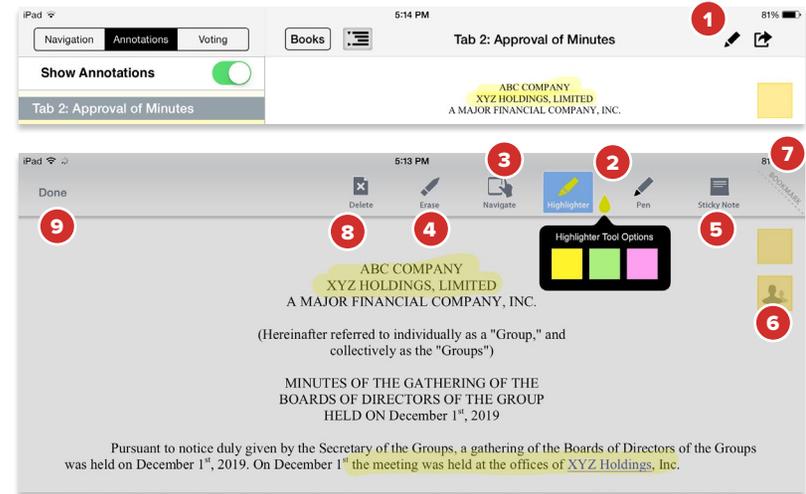
6 Saved sticky notes appear in the upper-right hand corner. Tap on a sticky note icon to view or edit it. Press and hold a sticky note icon to move it to another location on the page.

7 Tap the **Bookmark** button to create a bookmark on the current page. This can also be done out of Markup Mode by tapping the upper-right hand corner of a document at any time.

8 Tap the **Delete** button for a menu of options to remove all page annotations, markups only or all book annotations.

9 Tap **Done** to exit out of Markup Mode.

10 To view and manage all of your annotations, tap the **Annotations** button in the Navigation Panel.



# Contacts

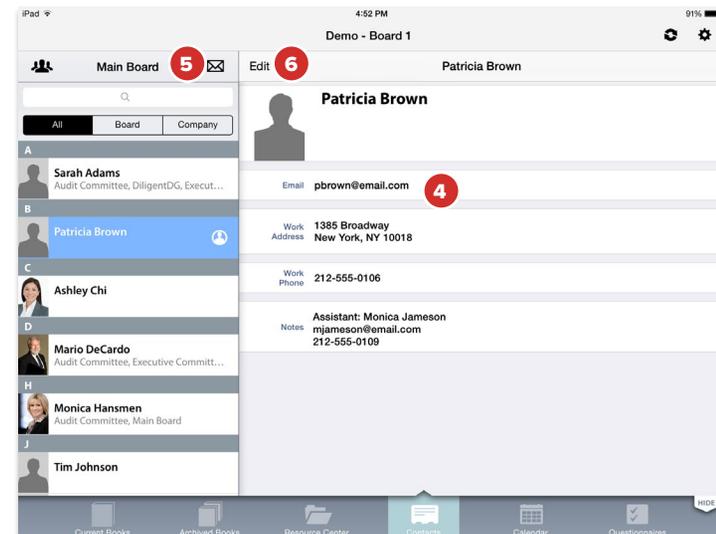
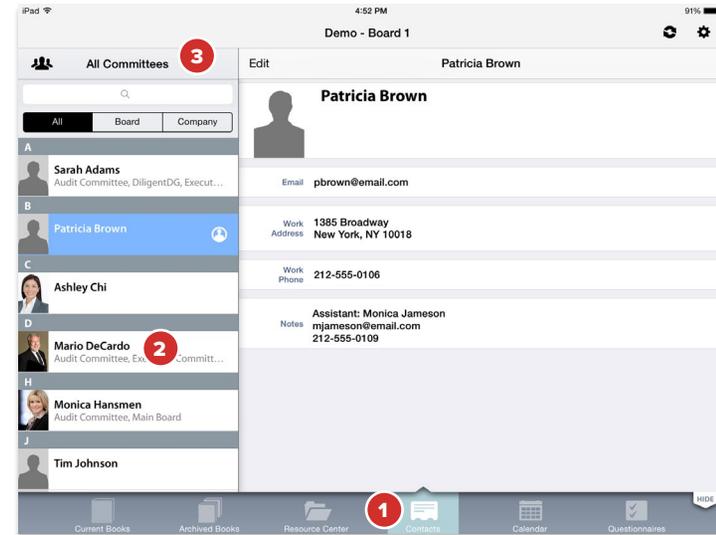
The contacts section contains a list of all of your board contacts.

- 1 Tap the **Contacts** button. A list of contacts will be displayed.
- 2 Tap any contact in the list to display their detailed information.
- 3 Multiple sort and search options are available in the upper-left hand corner. From here you can search by typing a name, filter by committee, or display only Board or Company contacts.
- 4 Tap a contact's email address to email them. A window for composing the email will appear.
- 5 Tap the **Envelope** icon to email everyone on the selected committee.

*Note: Diligent Boards uses the iPad's built-in email App. This App must be set up in order to use email in the Diligent Boards iPad App.*

*Note: Email functionality is optional and may be disabled by your Administrator.*

- 6 Tap your own name in the list to view and edit your contact details. To edit, tap the **Edit** button. You can then tap most displayed details to edit them directly, including your photo.

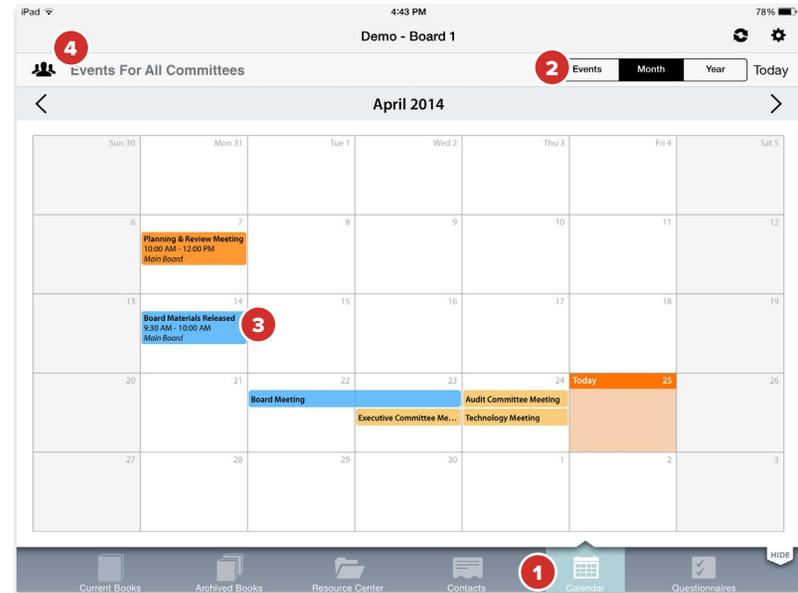


# Calendar

The calendar lets you view all of your board's meetings and events in a single, centralized location.

- 1 Tap the **Calendar** button. A list of events will be displayed.
- 2 Tap **Month, Year or Events** to change how your calendar items are displayed.
- 3 While in the Event or Month view, tap any event to get detailed information about that event.
- 4 Tap the meeting group filter icon to view only events specific to a board or committee.

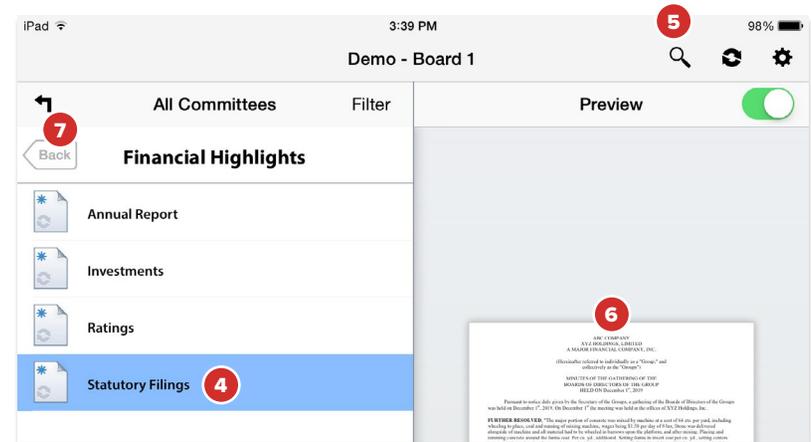
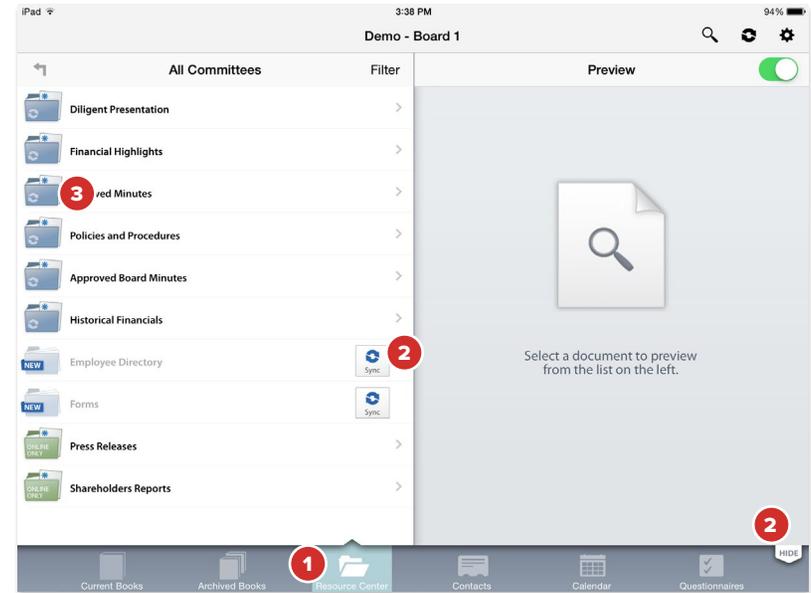
*Note: Times in the calendar are synced to the iPad's clock, and will update automatically when you travel to different time zones.*



# Resource Center

The Resource Center gives you access to a library of your board's reference and governance materials.

- 1 Tap the **Resource Center** button. A list of folders containing reference materials will appear.
- 2 Tap **Sync** to download that folder's contents to your iPad. A green folder icon indicates it cannot be downloaded for offline viewing.
- 3 Tap a folder to view its contents.
- 4 Tap any document in a folder to preview that document.
- 5 Tap the **Search** icon to reveal the search screen, where you can search for any word or phrase in the Resource Center.
- 6 Tap a document's preview to open that document for reading. To return to the Resource Center while reading a document, tap the **Documents** button.
- 7 Tap the **Back** button to return to the previous folder level.



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If you encounter difficulty or have additional questions, please contact Diligent Boards 24/7 support for your region.

All calls will be answered in English. If assistance in another supported language is required, the call may be transferred to another Support Representative.

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