Boardbooks Web Client
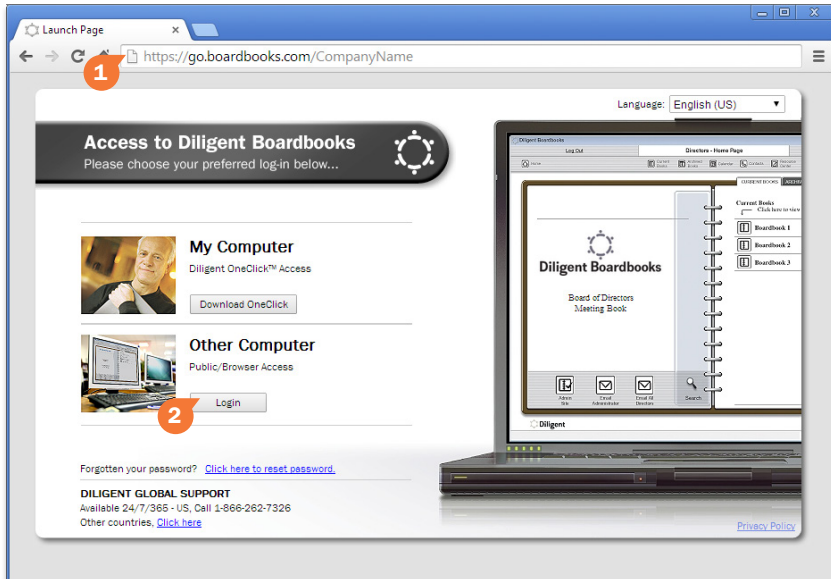
Diligent

Starting Boardbooks

The Boardbooks Web Client lets you access your books from web browsers on PC, Mac, and tablets without having to install an app.

1 Open your web browser and type the following web address into its top bar:

**2** On the web page that appears, under **Other Computer**, select **Login**.

3 Enter your user name and case-sensitive password. Select **Launch**. If your browser opens a message saying that pop-ups are blocked, follow your browser's instructions for unblocking pop-ups.

Note: *Certain browsers may not show the "Other Computer" message, and instead go to the user name and password fields directly.*

Note: *If your company has multiple boards, an additional drop-down menu will appear above the "Launch" buttons. Select your board from this menu.*
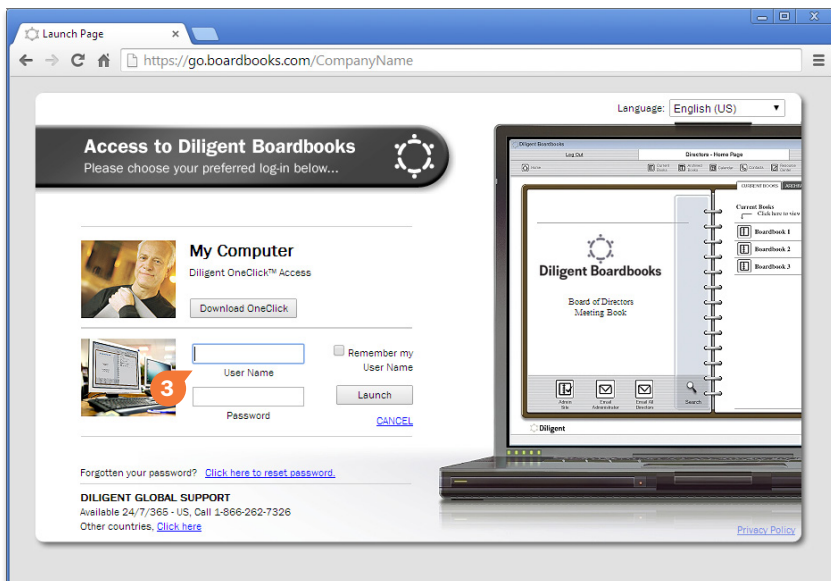
Selecting and Managing Books
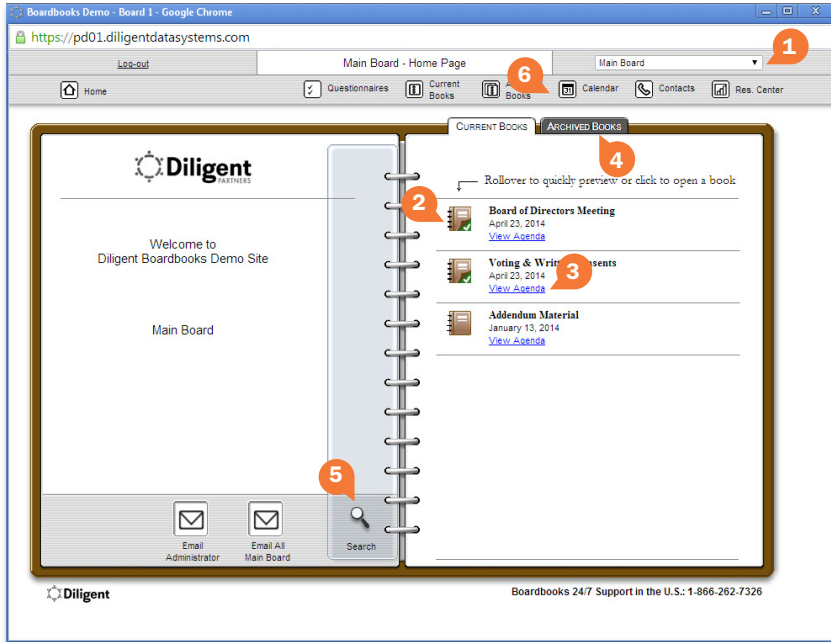
The Home Page displays all of your board's meeting books. From here you can select a book to read, or switch between current and archived board materials.

1   Select the drop-down menu in the upper right-hand corner and select the board or committee whose books you want to view. The list of current books will update automatically.

2   Select a book to open a web page containing that book's details. You will be able to read the book by choosing a book section from this page.

3   Click on **View Agenda** to go to directly to the book's agenda page.

   Note: *Certain browsers may not show the "View Agenda" link.*

4   Books from previous meetings are available to view by selecting the **Archived Books** tab.

5   Select Search to open the search window. From here you can search for specific words or phrases in current books, archived books, and the resource center.

   Note: *Search is not available on tablets and other mobile devices.*

6   The board **Calendar**, **Contacts** list and **Resource Center** of reference and governance materials are available via the icons in the Home Page's top menu bar.

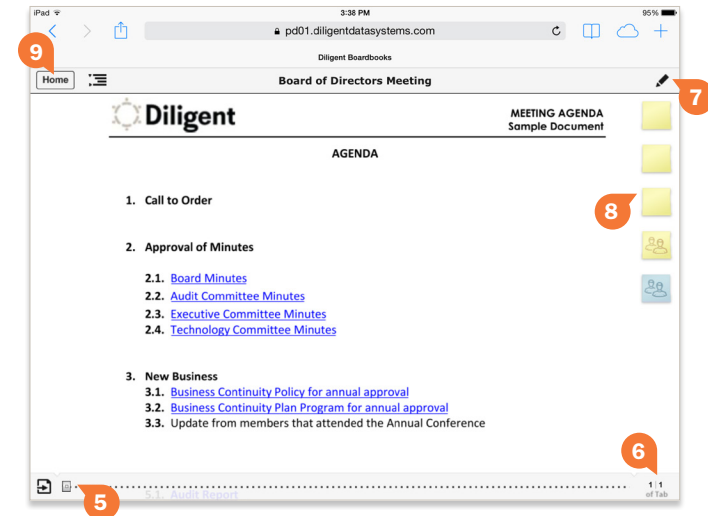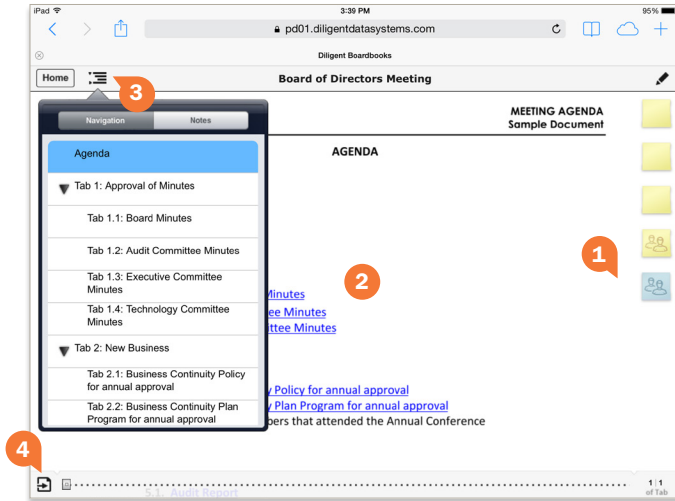# Navigating and Annotating a Book - PC and Mac
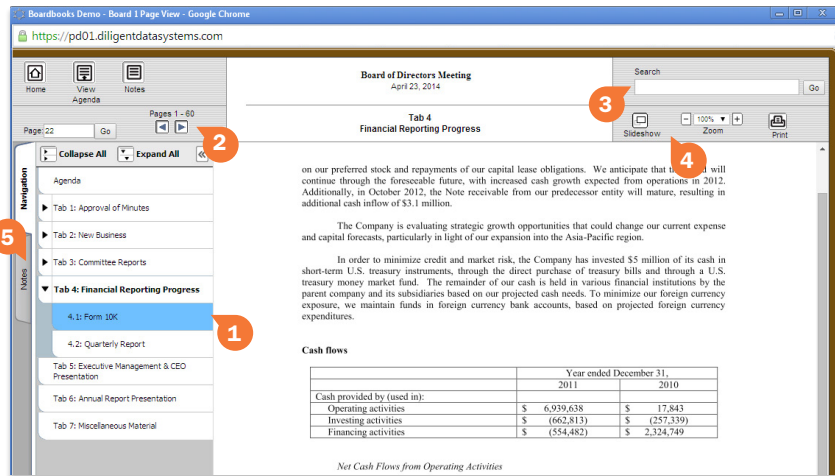
The page view displays all your book content and includes features for an optimal reading and navigation experience. It also makes tools available for adding personal notes.

1   The navigation panel displays an outline of the book on the left-hand side of the window. Click any section in the outline to go to that section's first page.

2   Click the arrows above the navigation panel to move through the pages of the book. Alternatively, you can type a page number directly into the field to the left of the arrows and click **Go** to move directly to that page on the current tab. You can also use **Page Up** and **Page Down** on the keyboard.

3   Type in the **Search** bar and click **Go** to find a word or phrase in the book.

4   Use the **Slideshow** button or **Zoom** menu to change the way the book is displayed on your screen.

5   Click the **Notes** tab to create, preview and manage your notes.

6   Select **Page Notes** to see all the notes on the current page. Select **All Notes** to see all of the notes in the book.

7   Click a note in the list to see the content of the note. Click **Go** to go directly to the page the note is on.

8   Click **Create Note** to write a new note on the page.

9   Click a note in the list and click **Edit** to rewrite that note.

**10** Click the **Home** button to return to the Home Page.
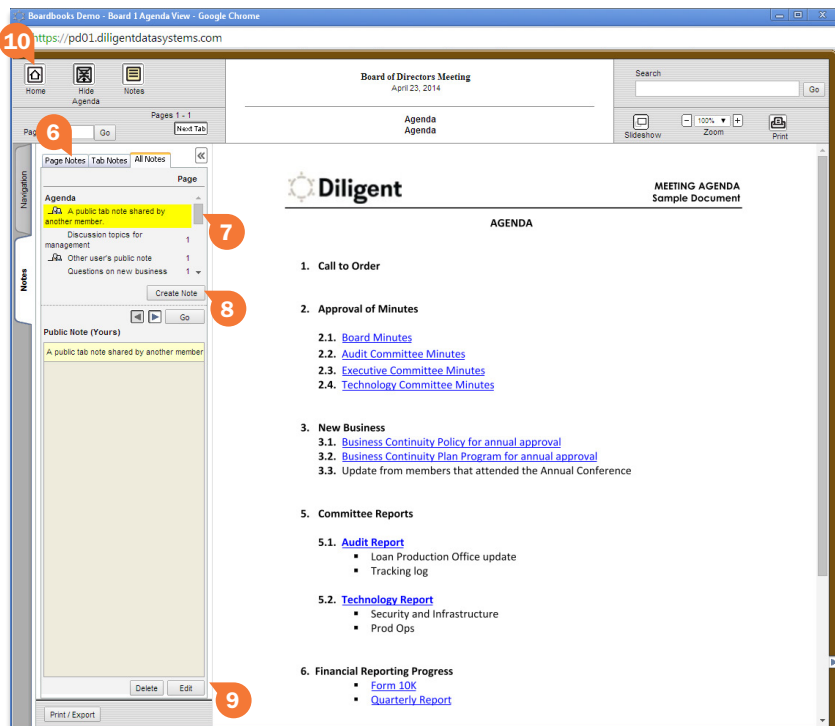
Navigating and Annotating a Book - Android and iPad

The page view displays all your book content and includes features for an optimal reading and navigation experience. It also makes tools available for adding personal notes.

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 to enter a specific page number. Tap **Go** on the keyboard to go to the page entered.

7 Tap the **Sticky Note** button to create a sticky note on the page. Use your device's keyboard to enter text. Tap **Save** to keep the note, or tap **Cancel** to delete it.

8 Saved sticky notes appear in the upper right-hand corner. Tap on a sticky note icon to view or edit it.

**9** Click the **Home** button to return to the Home Page.

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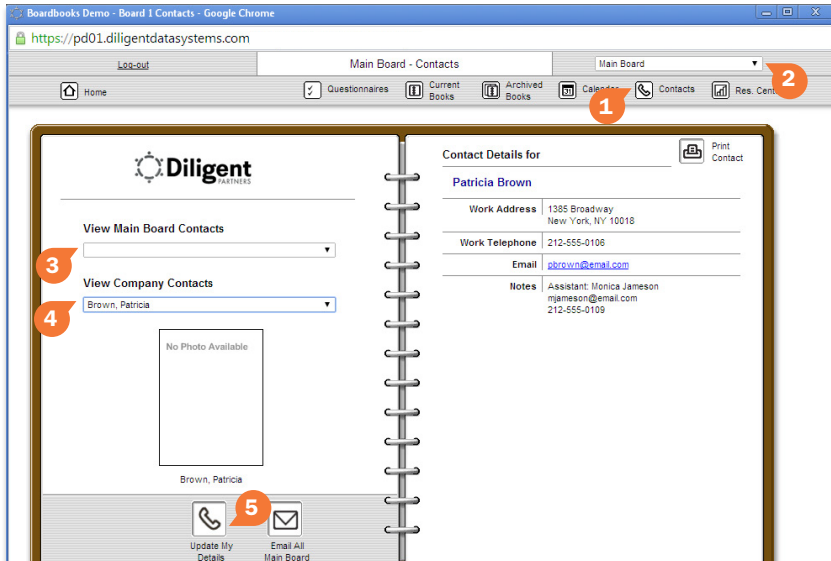
The contacts section contains a detailed list of all your board contacts.

1 Click the **Contacts** icon to open the contacts section.

2 Select the board or committee whose contacts you want to view from the drop-down menu in the upper right-hand corner.

3 To view a board member's contact information, select their name from the **View Main Board Contacts** menu.

4 To view an affiliated non-board member's contact information, select their name from the **View Company Contacts** menu.

5 Click **Update My Details** to edit your own contact information.

Note: *"Update My Details" is not available on tablets and other mobile devices.*

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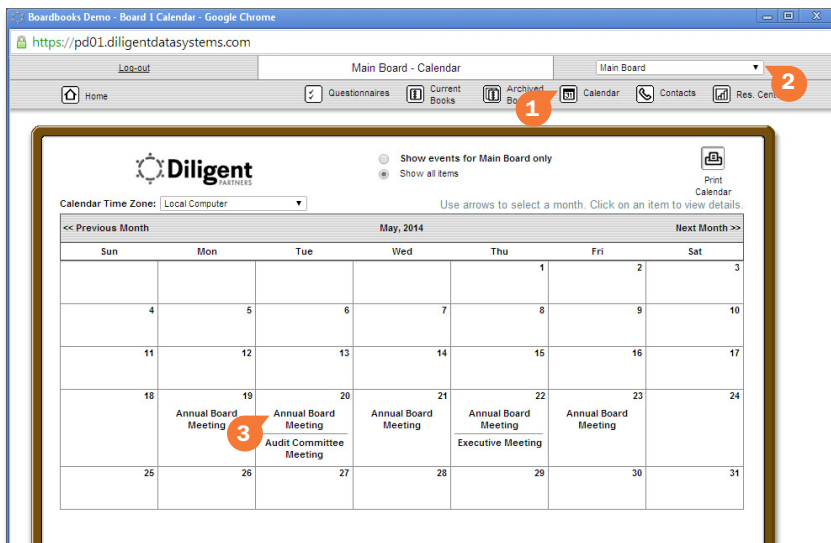
The calendar lets you view all of your board's meetings and events in a single, centralized location.

1 Click the **Calendar** icon to open the calendar section.

2 Select the board or committee whose calendar you want to view from the drop-down menu in the upper right-hand corner.

3 Select an event to open a web page or window containing more detailed information.

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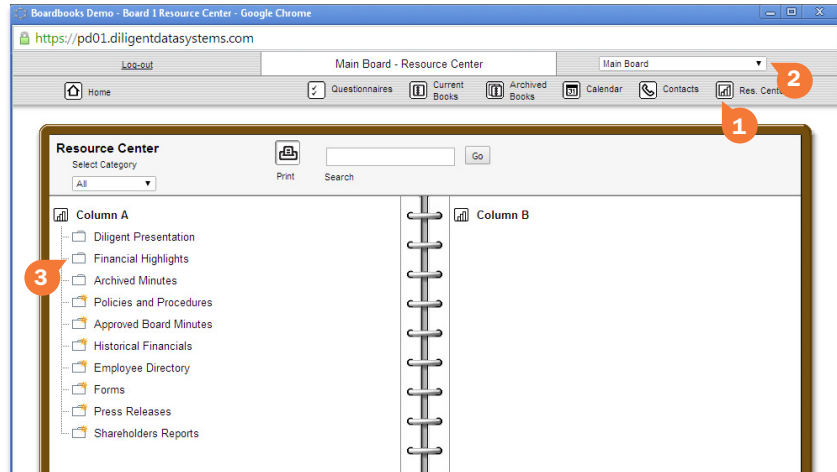
The Resource Center gives you access to a library of your board's reference and governance materials.

1 Click the **Res. Center** icon to open the Resource Center.

2 Select the board or committee whose Resource Center you want to view from the drop-down menu in the upper right-hand corner.

3 Click on a folder to view its contents. Click on any document in a folder to view that document.

Global 24/7 Support

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

United States and Canada.. 866-262-7326	New Zealand 0800-345-443
UK, Europe and Africa ....+44-800-234-6580	Australia 1-800-106-454
Brazil (English language support) 0800-020-1536	South Africa 0800-982-325
Germany (English language support)...............................+49-69-967-59350	Asia Pacific ....+64-3-977-5598

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