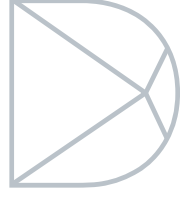
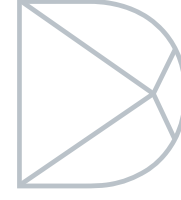
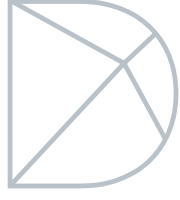
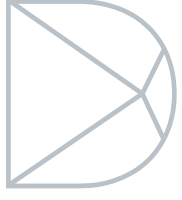
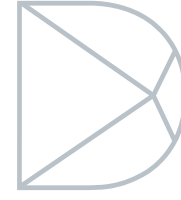
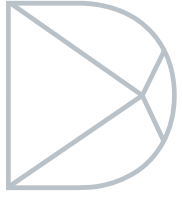
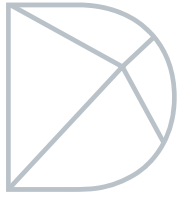
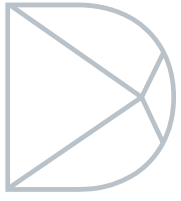
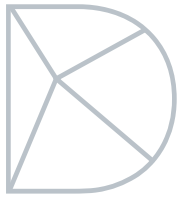
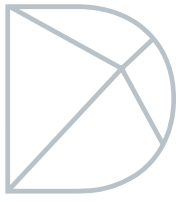


Diligent Boards for iOS— iPad

Reference Guide v3.8.0





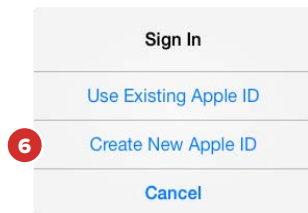
Contents *Reference Guide v3.8.0*

Installing the iPad App	4	Contacts	34
Getting Started	5	Adding or Updating a Signature	35
Activating Touch ID	6	Calendar	36
Using Touch ID	8	Voting	38
Push Notifications	9	View Voting Items	38
Managing Your Board Materials	10	Voting Status and Signature Page	39
Download and Manage Current Books	10	Questionnaires	40
Alerts	11	Managing Questionnaires	40
The Section Menu	12	Responding to a Questionnaire	41
Opening and Removing Books	13	Accessing Diligent Messenger	42
Update History of a Current Book	14	Multitasking With Split Screen View	43
Archived Books	15	Security	45
The Resource Center	16	Change Password	45
Viewing Resource Center Items	17	Security Questions	46
The Resource Center Filter Menu	18	Log Off	47
Book Navigation Features	19	Settings and Personalization	47
Search	19	App Settings	47
Viewing Book Contents	21	Advanced Settings	49
Navigation Panel	22	Language Settings	50
Book Annotations and Notes	23	Support and Assistance	51
Markup Toolbar (Create Annotations)	23	Online Help	51
Move Sticky Notes	25	Forgot Password?	51
Annotations Panels	26	Support Numbers by Region	52
Sharing Notes	27	Appendix A: Functionality in Split Screen View	53
Commenting on Notes	28		
Tab-Level Notes	29		
Sync Annotations Across Devices	30		
Sending Annotations via Email	31		
Note Saver	32		
Printing Pages and Annotations	33		

Installing the iPad App

The iPad Application is installed from the Apple iTunes App Store, which requires an Apple ID to use. If you are not authorized to install applications on your iPad, please contact your IT department for assistance.

- 1 To install the iPad application, tap the **App Store** icon on your iPad Home Screen.
- 2 Tap **Search**.
- 3 In the Search field, enter the keywords **Diligent Boards**.
- 4 A list of results will automatically appear. Tap **Diligent Boards** when it appears in this list.
- 5 Tap the **Get** button for the Diligent Boards app. You may then be prompted to tap Install to proceed.
- 6 The App Store may prompt you for your Apple ID and password or your Touch ID to complete the download. If you do not have an Apple ID, tap **Create New Apple ID** and follow the prompts to create one.

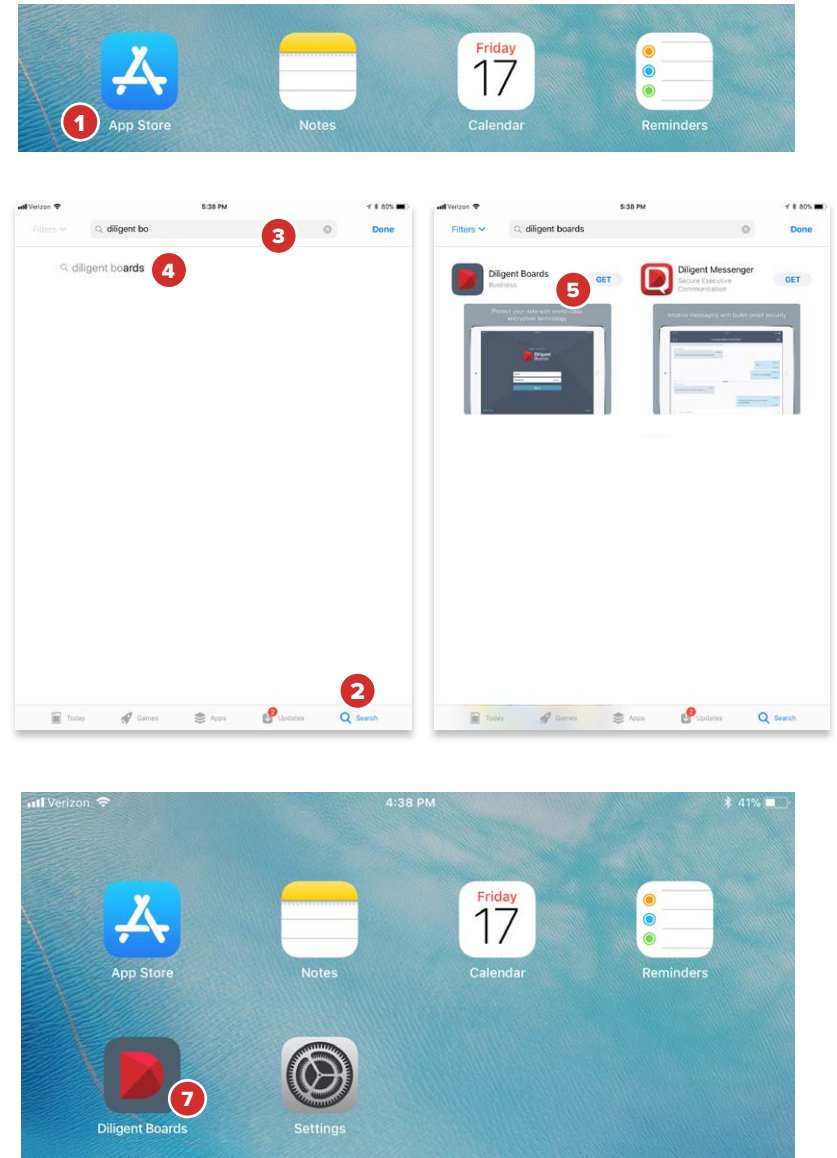


Tip: If you have an existing Apple ID, but do not remember the password, please visit Apple's self-service password reset website: <https://iforgot.apple.com>

- 7 Once your Apple ID is successfully created, the iPad App will download and an icon will appear on your home screen.

Note: If you create a new Apple ID and the iPad App does not automatically download, please repeat steps 2–5, and sign in with your new Apple ID.

Did You Know? Diligent Boards is now available on your iPhone, with the same familiar interface and many of the same features as the iPad app.



Getting Started

- 1 To begin using the iPad application, tap the **Diligent Boards** icon on your iPad home screen.
- 2 The first time you launch the application, you will need to enter the Diligent Boards site name for your company. Tap on the address field and enter the address below:
- 3 Tap **Continue** to proceed to the sign in screen.
- 4 Enter the user name with which you have been provided.
- 5 Enter your case-sensitive password.
- 6 Tap **Sign In**.

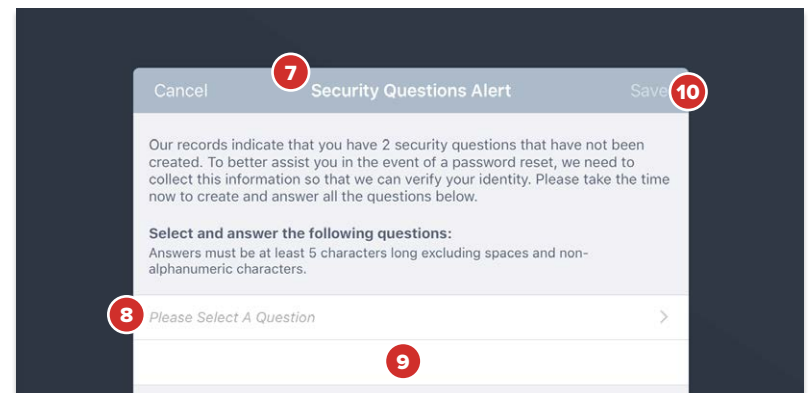
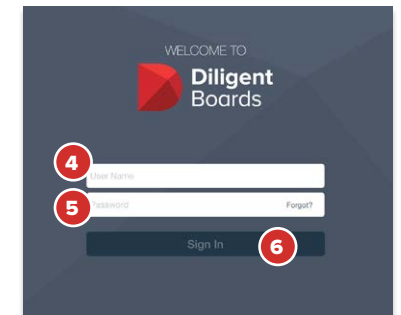
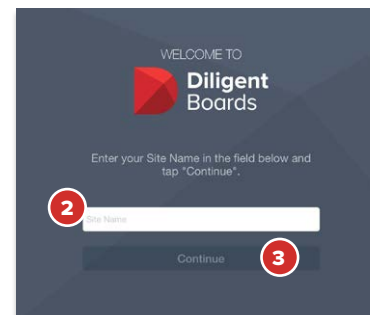
Note: If you get a notice that your account has not been authorized, call the number listed in the notification.

- 7 If signing in for the first time, you may see a **Security Questions Alert** window.

Note: Security questions are used for identification purposes, and are required in the event of a password reset. The security questions dialogue window will appear every time you sign in if your questions on file have not been recorded.

- 8 Tap on the **Please Select A Question** field to view a list of available questions from which to choose. If questions have been previously created, the question and answer fields will be populated.
- 9 Once a question is selected, begin typing your answer in the field directly below the question. Answers are not case sensitive, but must be at least 5 characters long, excluding spaces and non-alphanumeric characters.
- 10 Tap **Save** to save your questions and answers. If you press cancel, your answers will not be saved.

Note: If Push notifications have been enabled for your site, you may be prompted to choose whether or not to allow them. Push notifications are optional, and alert your device when your administrator chooses to announce new or updated board material.



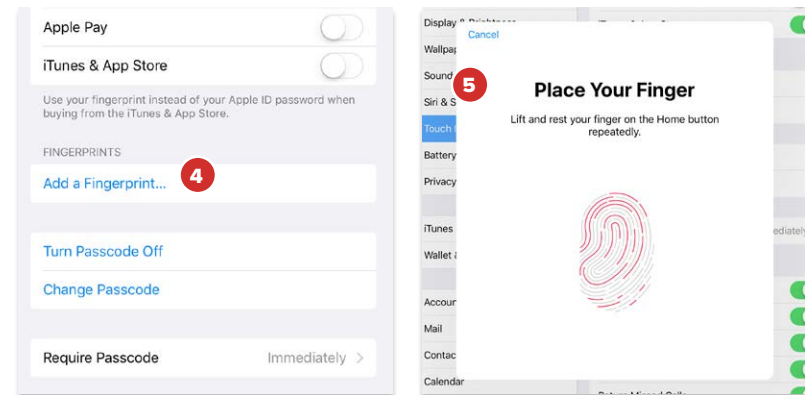
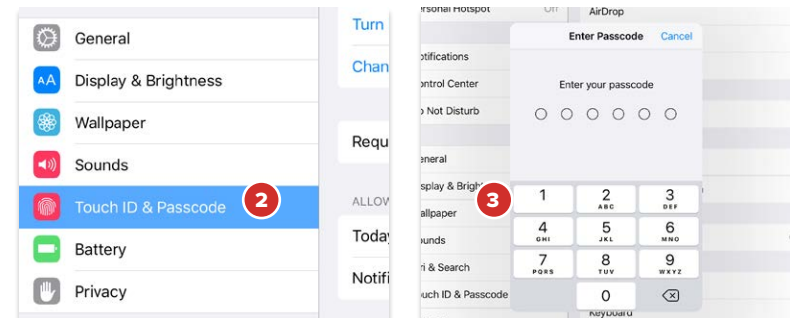
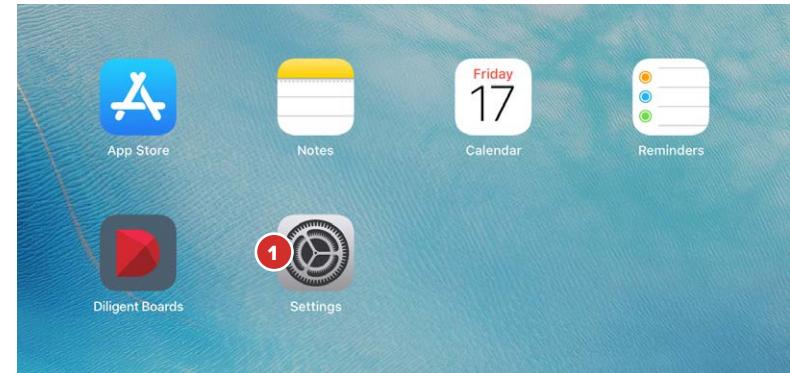
Activating Touch ID

When Touch ID is enabled, you can sign in to Diligent Boards using just your fingerprint (on supported devices and operating systems).

- 1 If you have not set up Touch ID on your device and would like to use Touch ID with Diligent Boards, tap **Settings** on your iPad Home Screen. If you have already set up Touch ID on your device, skip to step 6 on the next page.

Note: *Touch ID must be enabled by your Customer Success Manager. In order to use Touch ID with Diligent Boards, your compatible iPad must be upgraded to iOS 9 or later and you must be using Diligent Boards for iPad v2.2 or later. If your Diligent Boards site has not been enabled for use with Touch ID, or if your software does not meet these specifications, you will not be able to activate Touch ID for Diligent Boards.*

- 2 Tap **Touch ID & Passcode**.
- 3 Enter the **Passcode** for your device.
- 4 Under Fingerprints, tap **Add a Fingerprint**.
- 5 Follow the **on-screen instructions** to add your Touch ID fingerprint to your device.



Activating Touch ID— Continued

6 The first time you sign in to Diligent Boards after your administrator enables Touch ID for your site, you will be presented with your **Touch ID activation options**.

Note: *If you are on multiple boards, Touch ID must be enabled by Diligent for every board on which you sit in order to be available to you as an option.*

7 Tap **Yes** to activate Touch ID.

Note: *If you have not set up Touch ID on your device, an alert will appear and you will be taken to your default home screen (board selection, bookshelf or Resource Center). Follow steps 1 through 5 to set up Touch ID on your device.*

8 You will be prompted to confirm your Touch ID **fingerprint**.

Note: *After 3 unsuccessful fingerprint confirmation attempts, you will be taken to your default home screen and Touch ID will not be activated. You will be able to attempt to activate Touch ID again on your next sign-in.*

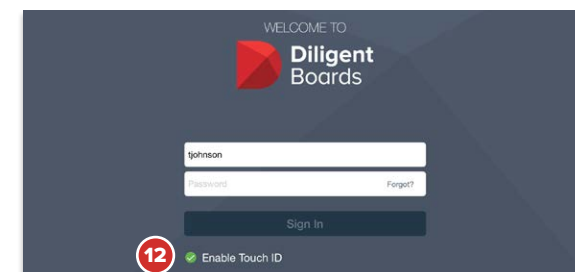
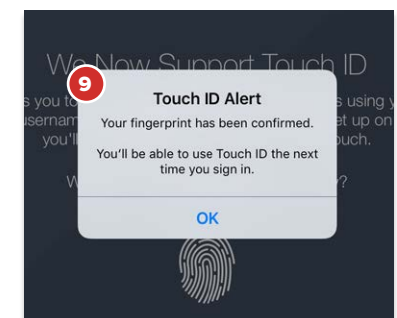
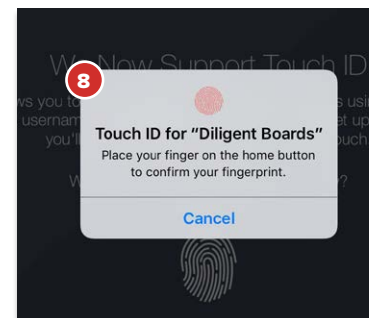
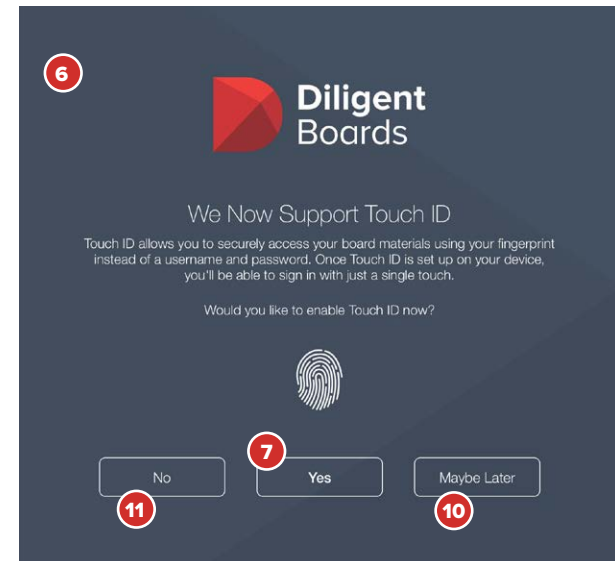
9 Upon confirmation that your fingerprint matches a Touch ID fingerprint on your device, you will be taken to your default home screen. You will now be able to use Touch ID to sign in to Diligent Boards in the future.

Note: *For security purposes, Touch ID is not recommended for use on shared devices. Your Diligent Boards credentials will be associated with all Touch ID fingerprints stored on your device, and other device users will be able to access your Diligent Boards materials with their own Touch IDs.*

10 Choosing **Maybe Later** from the Touch ID activation screen will bring you to your default home screen. You will be prompted to activate Touch ID for Diligent Boards the next time you sign in.

11 Choosing **No** from the Touch ID activation screen will bring you to your default home screen, and you will not be prompted to activate Touch ID again.

12 If you would like to activate Touch ID after choosing No, tap the **Enable Touch ID** checkbox on the Diligent Boards sign-in screen, enter your credentials and follow steps 8 and 9.



Using Touch ID

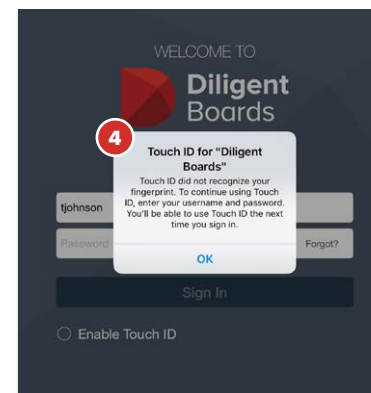
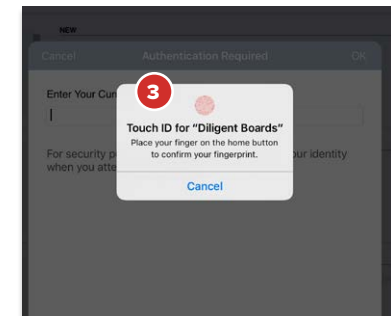
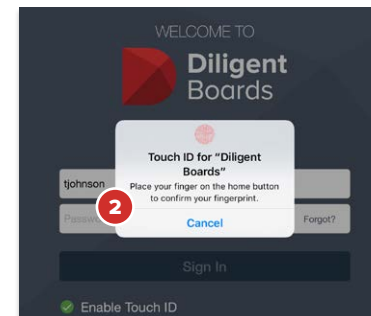
Once Touch ID is enabled and configured, you're ready to use it to confirm your identity for Diligent Boards sign in and other authentication requirements.

- 1 Tap the **Diligent Boards** icon to open the application as you normally would.
- 2 At the on-screen prompt, press and hold your **Touch ID fingerprint** on your iPad's home button. After a second or two, you will be signed in and ready to use Diligent Boards.

Note: If you are not prompted to sign in with Touch ID, contact your administrator or Diligent to ensure that Touch ID is enabled for your board site, confirm that Touch ID is available and enabled on your device, and be sure that the Enable Touch ID checkbox is checked on the sign-in screen.

- 3 You will be able to use **Touch ID** to confirm your identity any time you would normally be prompted to enter your credentials, including session expirations and selecting a different board site.
- 4 If you are unable to sign in successfully via Touch ID after 3 attempts, Touch ID will be disabled and you will be prompted to **sign in with your username and password**.

Note: If Touch ID is disabled, you can re-enable it by checking the "Enable Touch ID" checkbox and following the steps in the "Activating Touch ID" section of this manual.



Push Notifications

Push notifications send an alert to your device when an administrator chooses to announce new or updated board material via this method.

- 1 If you've recently updated Diligent Boards, you may receive a prompt to allow push notifications on your device. Simply select **Allow** from this prompt to enable push notifications from Diligent Boards.

Note: You will only see this prompt, as well as any of the below settings options, if push notifications have been enabled for your site. Contact your administrator for more information.

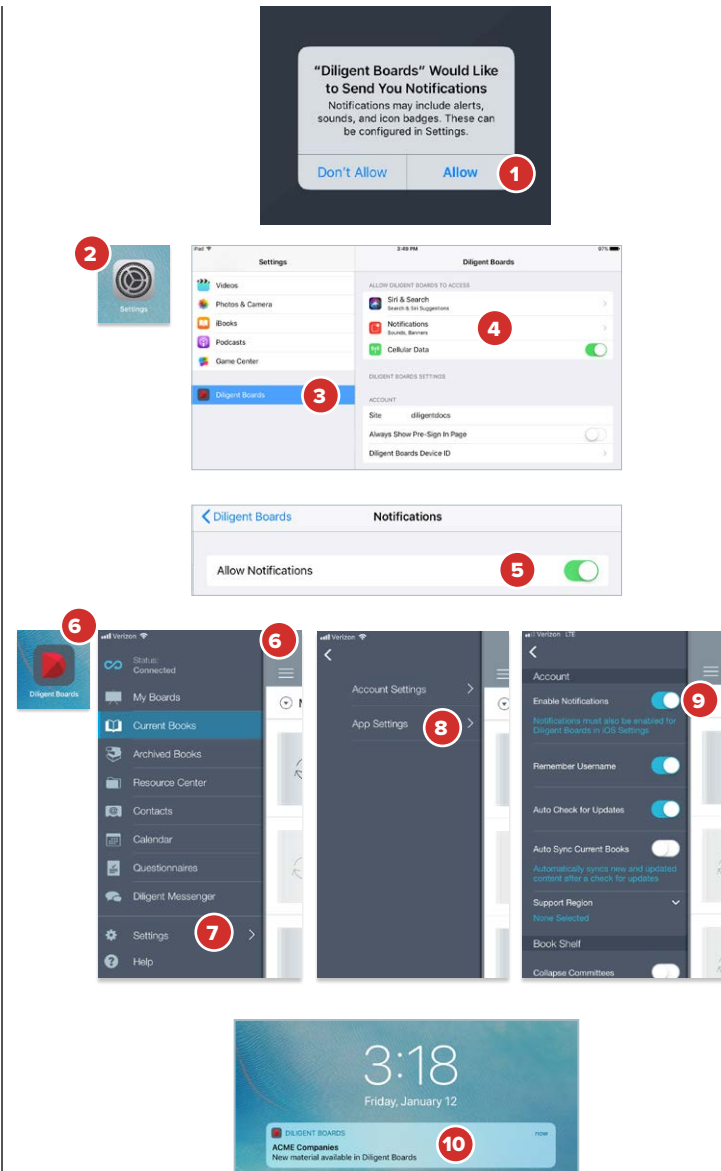
- 2 Push notifications can also be enabled or disabled manually. First, open the **Settings** app on your device.
- 3 Choose **Diligent Boards** in the left-hand menu.
- 4 Choose **Notifications**.
- 5 Select the **Enable Notifications** switch.

Note: If "Enable Notifications" is turned on, tapping it will disable push notifications for Diligent Boards.

- 6 Next, go to your **Diligent Boards** app and open the left-hand navigation menu.
- 7 Choose **Settings**.
- 8 Choose **App Settings**.
- 9 Enable the **Allow Notifications** switch.

Note: If "Enable Notifications" has not been turned on in your device Settings app, this switch will be grayed out and disabled.

- 10 To open a push notification, **tap** it. You will be taken to either the first page of the book that has been updated, or to a specific document, depending on the type of notification that your administrator has sent.



Download and Manage Current Books

Diligent Boards for iPad makes it easy to manage and sync your board materials, even if you're on multiple boards.

- 1 If you sit on multiple boards, you may be presented with the **Select a Board** screen. Select a board to open by tapping its name.

Note: If you do not sit on multiple boards, you will be taken directly to the bookshelf ... list view. If you are taken to the Resource Center instead, your administrator has changed your site's default settings. See the guide section on the Resource Center.

- 2 Before you can view content in a book, you must first download the book to your iPad by tapping an **Unsynced Book** icon. Books that have not been synced are labeled with a circular arrow:



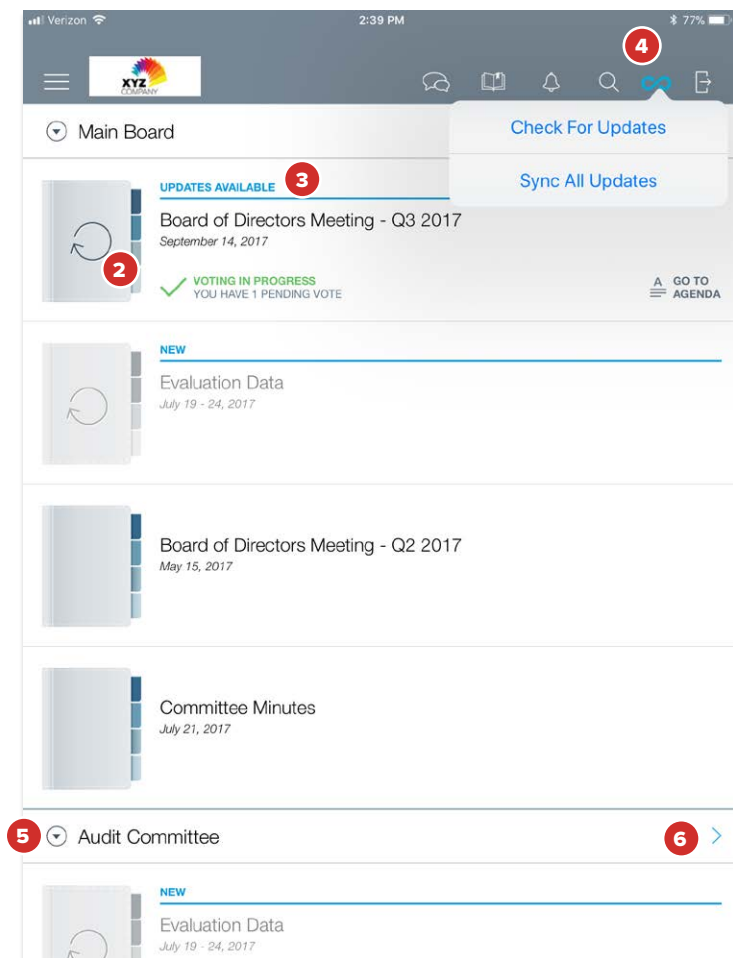
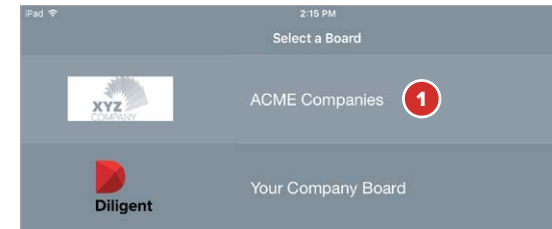
Note: Sync times will vary based on Internet connection speed and book size.

Tip: You can start reading a book when it begins syncing. The book will sync as you read.

- 3 By default, Diligent Boards will automatically check for updated versions of your books each time you log in.
- 4 For additional sync options, tap the **Connection** icon in the top menu bar. From this menu, you can **Check For Updates** or **Sync All Updates**. This icon will also indicate the status of your Internet connection by turning blue.
- 5 To collapse and hide a committee's set of books, tap the **Arrow** to the left of the committee name. To reopen, tap on the arrow again.

App Setting: A Diligent Boards setting is available to automatically collapse all committees in the bookshelf list. Please reference the "Collapse Committees" description in the App Settings section of this manual.

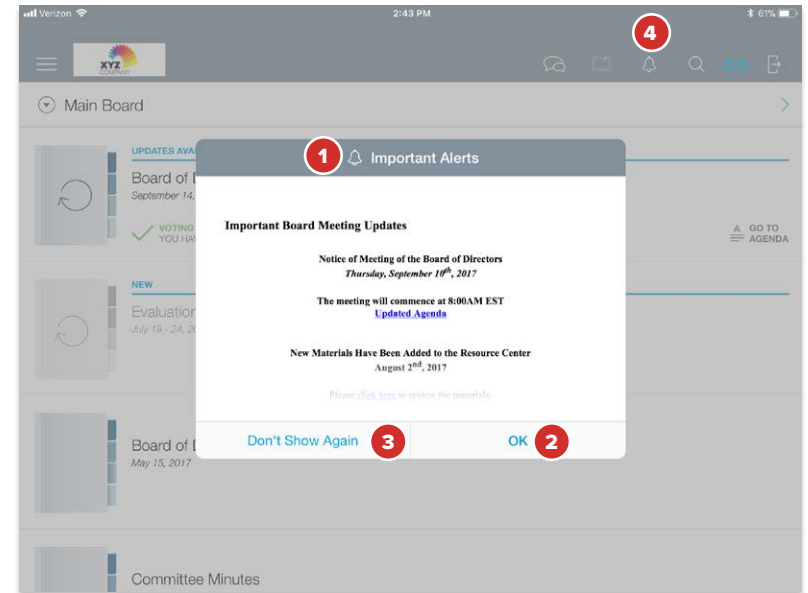
- 6 To display a list that only contains books associated with one committee, tap the **Arrow** to the far right of the committee name. To return to the list of books from all committees, tap the arrow that then appears to the left of the committee name.



Alerts

Your board administrator may notify you of important changes or announcements via an alert. This alert will appear when you sign in or check for updates.

- 1 When you sign on to your board site, a window titled **Important Alerts** may appear. This window will contain a message from your board administrator.
- 2 Tap the **OK** button to dismiss the message. The message will appear the next time you sign in or check for updates.
- 3 If you don't want the message to appear the next time you sign in or check for updates, tap the **Don't Show Again** button.
- 4 If you've dismissed the message, tap the **Bell** icon to make it appear again.



The Section Menu

The section menu allows you to access any section of your board site as needed, and hides itself when not in use.

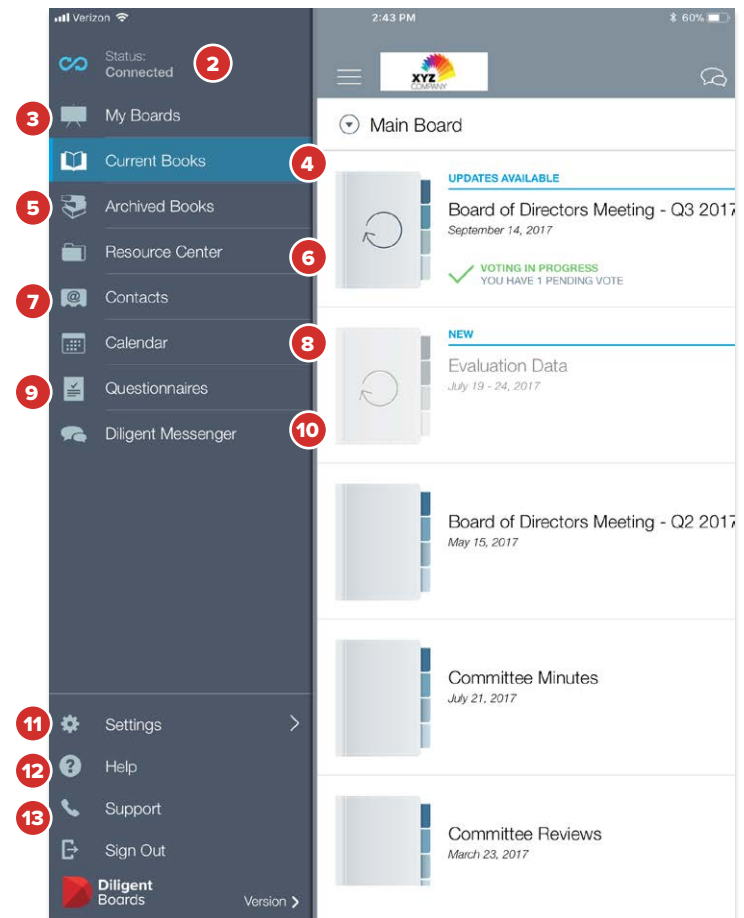
- 1 Tap the **Section Menu** icon in the upper-left corner.
- 2 The section menu will appear. The topmost icon displays your **Internet Connection Status**.
- 3 If you sit on multiple boards, tap **My Boards** to switch between them.

Note: If you do not sit on multiple boards, the “My Boards” button will not be present.

- 4 Tap **Current Books** to see your list of active books for current and upcoming meetings.
- 5 Tap **Archived Books** to see a list of stored books from previous meetings.
- 6 The **Resource Center** contains a library of reference documents and governance information.
- 7 Tap **Contacts** to see a list of people on or associated with your board, as well as their contact information.
- 8 The **Calendar** contains scheduling information for past and upcoming board events.
- 9 Tap **Questionnaires** to access your board surveys and questionnaires.

Note: Selecting any section will automatically close the section menu. If any of the above sections are not present, they have been disabled by your site administrator.

- 10 If you are a Diligent Messenger user, you can tap **Diligent Messenger** to switch directly to the app.
- 11 To update your account settings or app settings, tap **Settings**, then choose the appropriate option.
- 12 Tap **Help** to access the online help portal.
- 13 The **Support** button displays the list of all regional support numbers.



Opening a Book

- 1 To open a book to its first page, tap the book icon or title.
- 2 To go to the book agenda, tap the **Go To Agenda** icon. If there is no icon, the book does not contain an agenda tab.
- 3 To pick up where you were last reading, tap the **Resume Reading** book icon.

Removing a Book

Books can be removed from an iPad at any time if space needs to be reclaimed. Annotations can also easily be removed from the bookshelf.

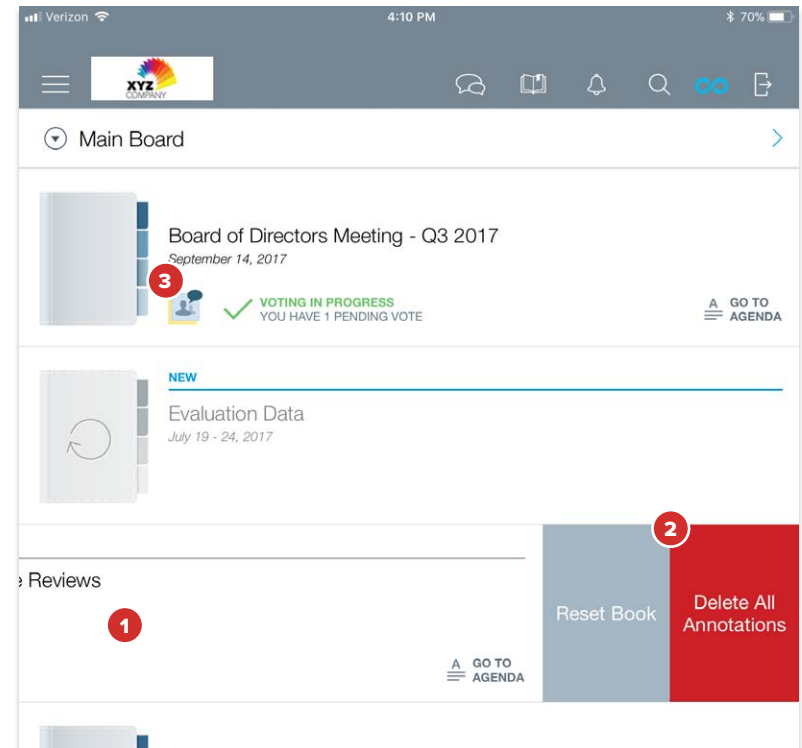
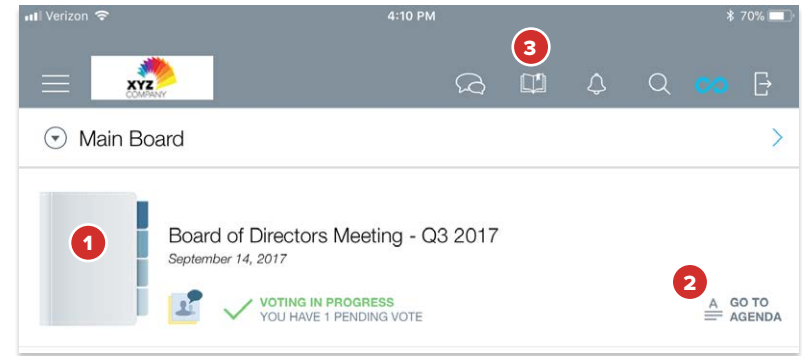
- 1 Touch and hold the book tile you would like to remove, or from which you would like to clear annotations, and slide your finger from right to left.
- 2 Buttons will slide in from the right. From here, you can choose to **Reset Book** or **Delete All Annotations**. If a book does not have any annotations, only the **Reset Book** option will appear. Resetting a book removes it from your device.

Note: When resetting a book, associated annotations may be completely deleted if annotations sync is not enabled on your Diligent Boards site. Contact your administrator or Diligent Global Support if you are not sure if annotations sync is enabled.

- 3 From the Bookshelf View, you can see which books have annotations. Books with annotations will display one of the following icons:



Note: For more information on these icons and the annotations list, check the page on the [“Annotations Panels.”](#)



Update History of a Current Book

A list of newly added or updated book documents can be viewed in a book's Update History.

- 1 An icon labeled **Update History** will appear within the row of book details in the current bookshelf list, after you have successfully synced your book update.

Note: An Update History icon will only appear on sync if the book update includes document changes that your board administrator has chosen to publicize.

- 2 A sub-heading will display information on the update, which may include:

2a: Sync for Latest Updates. This indicates the book needs to be synced again before some updates can be made available.

2b: The number of updates as a result of the last sync.

- 3 Tapping the **Update History** icon or label will open a list of both new and previously made updates.

3a: Each list item will display the details of the updated document, including whether it is a new or revised document, the date of the change, the tab name, the affected page range and a public comment from the administrator, if any.

3b: An arrow icon and an ellipsis will appear if there is additional comment information. Tap the arrow to expand or collapse the full comment.

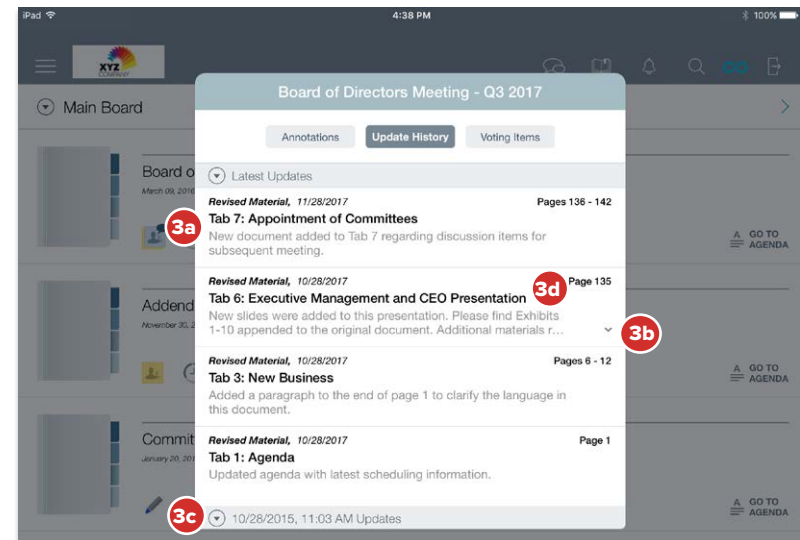
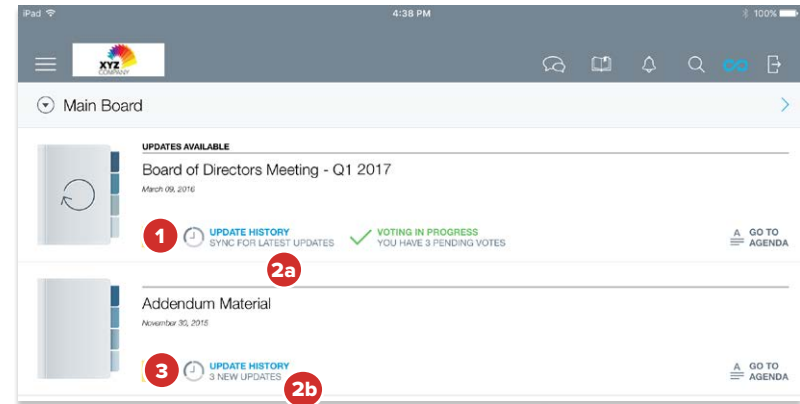
3c: Previously synced updates will be collapsed at the bottom of the list so that only the sync date is visible. Tap this label to expand this list of updates.

3d: Tapping anywhere on a list item will navigate to that section of the book.

- 4 To view the Update History in the page view of a book, expand the navigation panel and tap the **Updates** icon.

Tip: To open the navigation panel, tap the icon in the upper left corner next to the "Books" button.

- 5 From the navigation panel, you can view all of the updates in the book. List items will remain highlighted as you navigate through the relevant document.



Archived Books

Books from prior meetings can be viewed in Archived Books. Archived Books are not synchronized to the iPad, and require an Internet connection to be viewed.

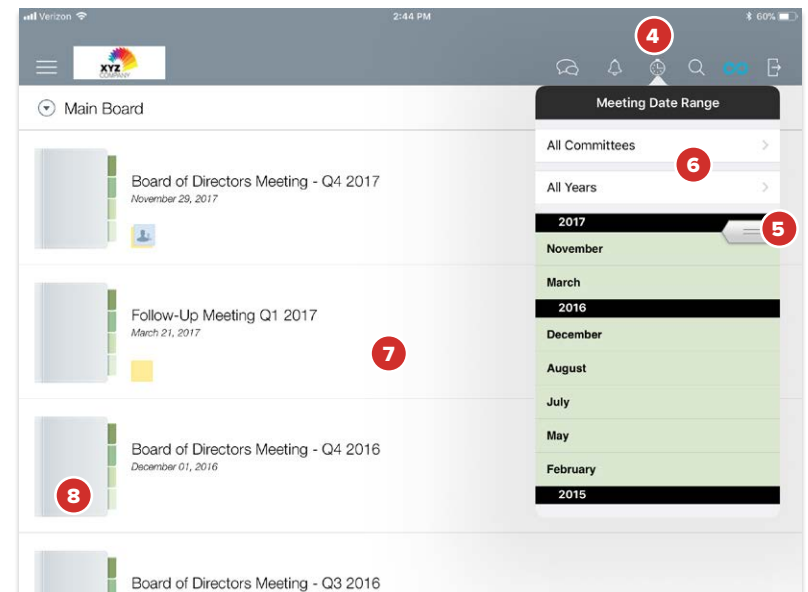
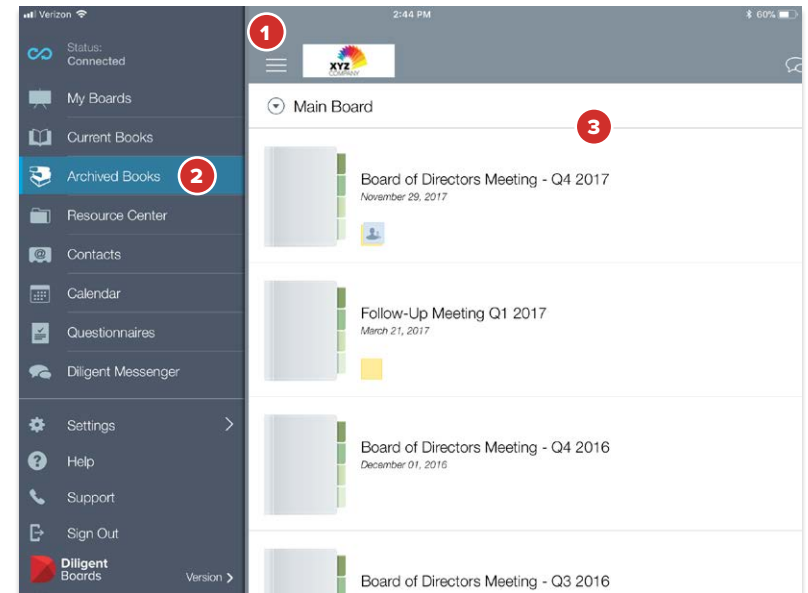
- 1 Tap the **Section Menu** button to open the section menu.
- 2 Tap the **Archived Books** button. The section menu will close, and a list of books from previous events will be displayed.
- 3 The first time you access the archived books section, the **bookshelf** will list the latest set of books from your previous meeting by default.

Note: Archived Books is only checked and updated upon logging in to your Diligent Boards site. If any board materials are archived during your session, they will not appear until you manually check for updates.

- 4 To change the range of books being displayed, select the **Meeting Date Range** icon in the toolbar. A menu displaying a historical timeline of all of your available archived books will appear.
- 5 Drag the **handles** up or down to select a range of archived books by month. Tapping on a specific month will select that month individually.

Note: The months selected in the Meeting Date Range window will remain set and will be applied automatically every time you log in and access the Archived Books section.

- 6 You can also view archived books associated with a specific committee or year. The book list will then show only the filtered results.
- 7 To hide the Meeting Date Range window, tap anywhere outside of the window.
- 8 To open an archived book to its first page, tap the **Book** icon.



The Resource Center

A library of reference documents and governance information can be found in the Resource Center.

- 1 Tap the **Section Menu** button to open the section menu.
- 2 Tap the **Resource Center** button. The section menu will close, and a list of folders containing reference materials will appear.
- 3 You can manually check for updates in the Resource Center by selecting the **Connection** icon in the top toolbar and selecting the **Check For Updates** button.

Note: By default, the application will automatically check for recent updates or changes the first time you navigate to the Resource Center section after signing in.

- 4 The Resource Center will open in a split-pane view. A list of accessible items will appear on the left. Selected items will appear in a preview window on the right.
- 5 Your folders can be a combination of **Offline** and **Online Only** items.
- 6 **Offline Folders** can be accessed without an Internet connection. They must be synced before they can be viewed. Tap the associated **Sync** button.

Tip: You can select the “Sync” menu and select “Sync All Updates” to sync all of your Offline items at once.

- 7 **Online Only** folders do not need to be synchronized, but can only be accessed with an active Internet connection.

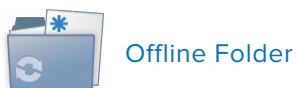


Offline Folder



Online Only Folder

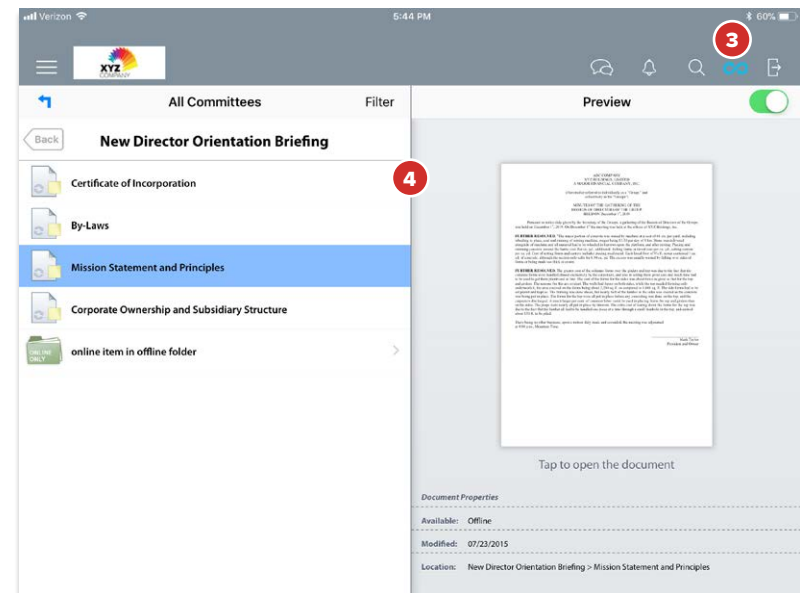
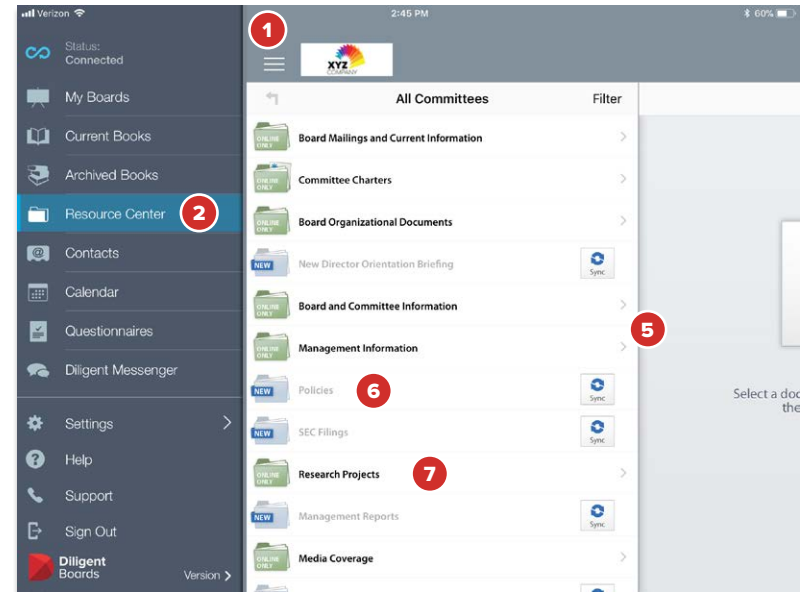
A folder can contain documents marked as **New**. This will appear as a folder icon containing a document with a blue sunburst on it. Any new documents uploaded will also appear with this icon.



Offline Folder



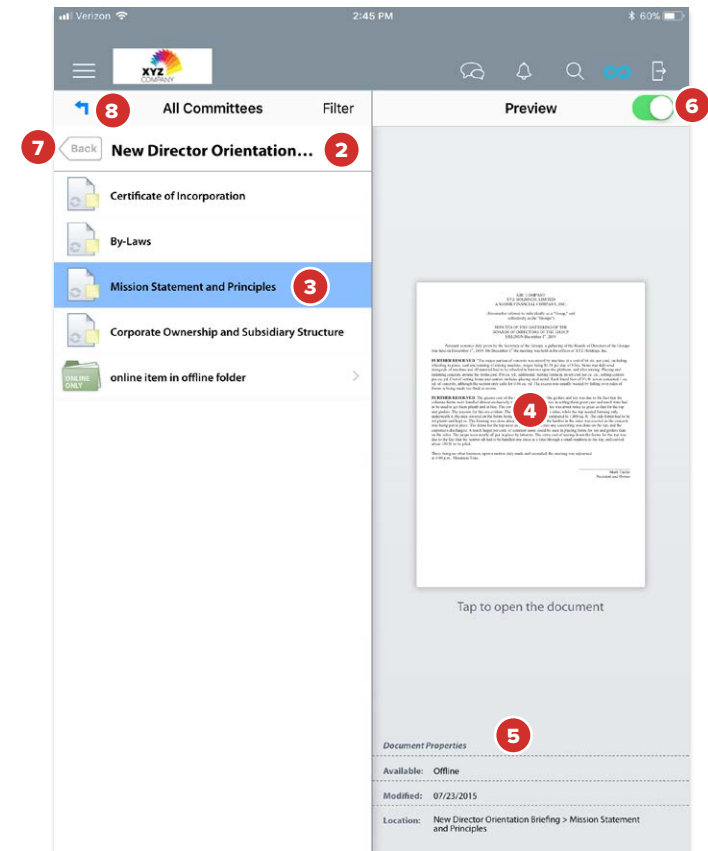
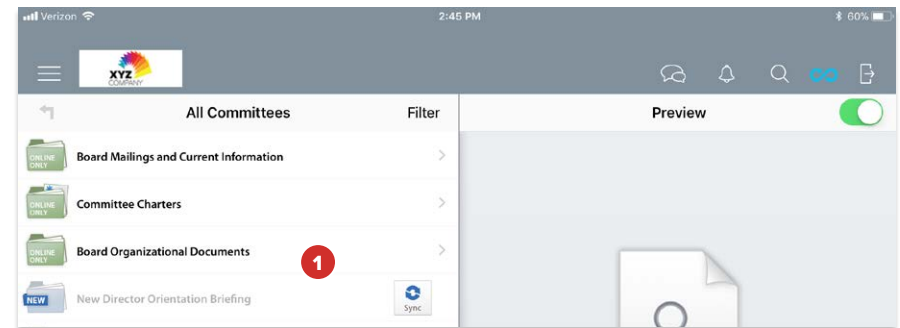
Online Only Folder



Viewing Resource Center Items

The Resource Center allows you to navigate the contents of a folder, and to see thumbnail previews of any resource document.

- 1 Tap any folder row to access that folder's contents.
- 2 A list of folder documents and sub-folders will appear. The name of the selected folder will appear in the navigation banner.
- 3 Tap a document to preview it. Once the document is selected, you will see a thumbnail image in the preview pane on the right.
- 4 To go to the document in page view, tap on the thumbnail image in the preview pane.
- 5 Availability, modification date and document location information appears below the **document preview**.
- 6 The **preview** slider can be turned off to quickly jump to the page view. Tap or swipe the toggle button left to the off position. Tap or swipe the toggle button right to re-enable the preview.
- 7 To return to the previous folder level, tap the **Back** button.
- 8 To quickly return to the top level of the Resource Center, tap the **Back To Top** button.



The Resource Center Filter Menu

The Resource Center can filter folders and documents being displayed based on selected criteria. This helps locate specific documents when there are a large number of items in the Resource Center.

- 1 To access the Resource Center filter menu, press the **Filter** button at the top of the resource items list. The menu will slide out from the left.

Tip: You can also show or hide the filter menu by swiping right or left anywhere along the right border of the items list column.

- 2 If filter options are currently applied, the Filter button will appear green.

- 3 The **filter menu options** allow for filtering by:

3a: Board or Committee

3b: Category

3c: Online and Offline Items

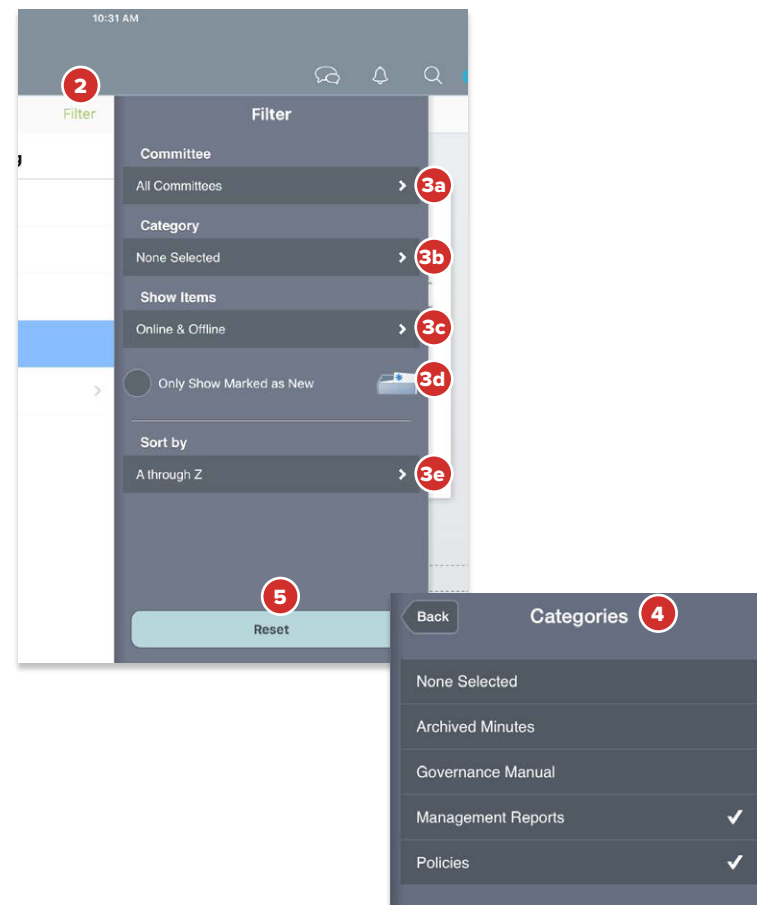
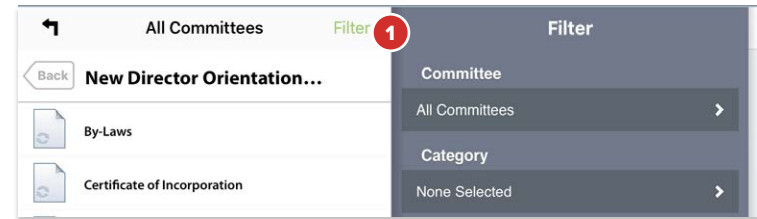
3d: Items Marked as New

3e: Alphabetical Sorting

Note: Offline items that are not synced will still appear in the items list if they meet the criteria in the filter menu.

- 4 Select a filter item to display a new panel with specific filter options. All filters except “Category” will allow one option to be selected. The “Category” filter allows multiple options to be selected.
- 5 To reset the filter options currently in use, tap the **Reset** button at the bottom of the filter menu.

App Setting: By default, your applied filter settings will be reset when you log in. A Diligent Boards setting is available for preserving these settings between sessions. Please reference the “Reset Filters on Login” description in the Advanced Settings section of this manual.

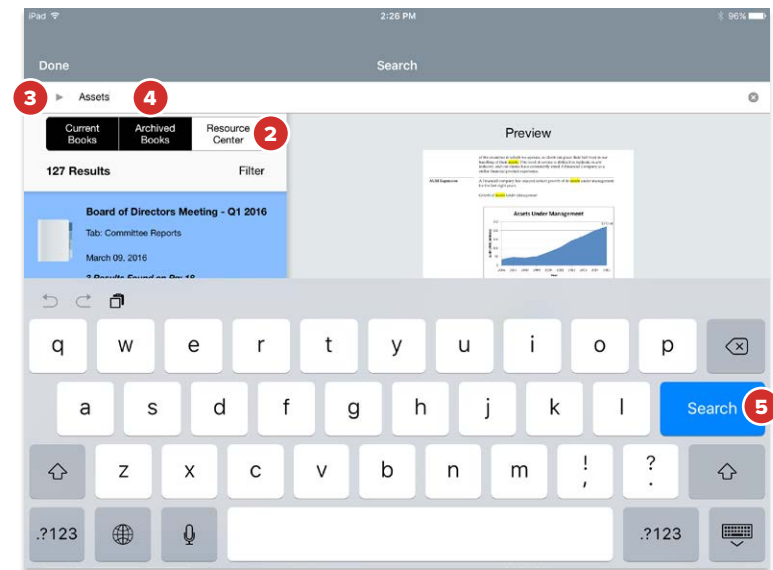
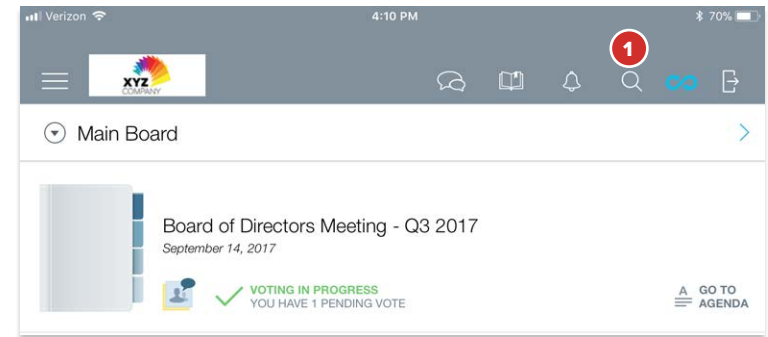


Search

The Search screen makes it easy to find a word or term in almost any section of the book, all from a single location.

Note: You must have an active Internet connection in order to use Search.

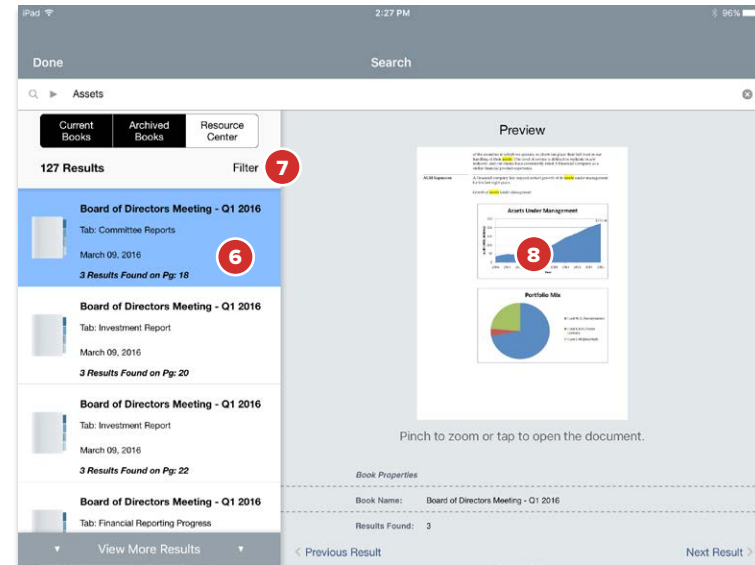
- 1 Tap the **Search** icon, which appears on the upper-right of the Current Books, Archived Books and Resource Center sections.
- 2 Tap the **Current Books**, **Archived Books** or **Resource Center** buttons to select the sections to search. You can select these options in any combination to search multiple sections at once.
- 3 Tap the small arrow to the left of the Search field to reveal search options:
 - **Search All Terms** shows only documents where all terms appear. If you searched for “My Documents,” this search would result in a list of documents that only include both the words “My” and “Documents.”
 - **Search Any Term** shows all documents that contain any one of the words being searched for. For example, if you searched for “My Documents,” this search would result in a list of all documents that include the word “My” or the word “Documents,” or both words.
 - **Search Exact Phrase** shows only documents where the exact phrase being searched for appears. If you searched for “My Documents,” this search would only result in a list of documents where the term “My Documents” appeared exactly.
- 4 Tap the **Search** field and type in the terms you would like to look for.
- 5 Tap the **Search** button on the digital keyboard. The search process may take several moments.



Search — Continued



- 6 Search results** will appear in a list on the left of the display. Swipe up and down this list to explore the results. Tap a result to display a preview of the document on the right of the display.
- Tap the **Filter** button to filter the search results by committee, or to sort results by meeting date, document name, document type or the number of times the search term appears in the document.
- Search terms will appear highlighted on the **Page Preview**. Tap this preview to go to that page in the Page View. Swipe the preview to the right or left to go to the previous or next search result.

Note: *Your most recent search will be retained on the search screen until you conduct a new search, are disconnected from Diligent Boards or perform a “Check for Updates.”*




Viewing Book Contents

The page view displays the contents of the selected book, and offers multiple ways to navigate that content.

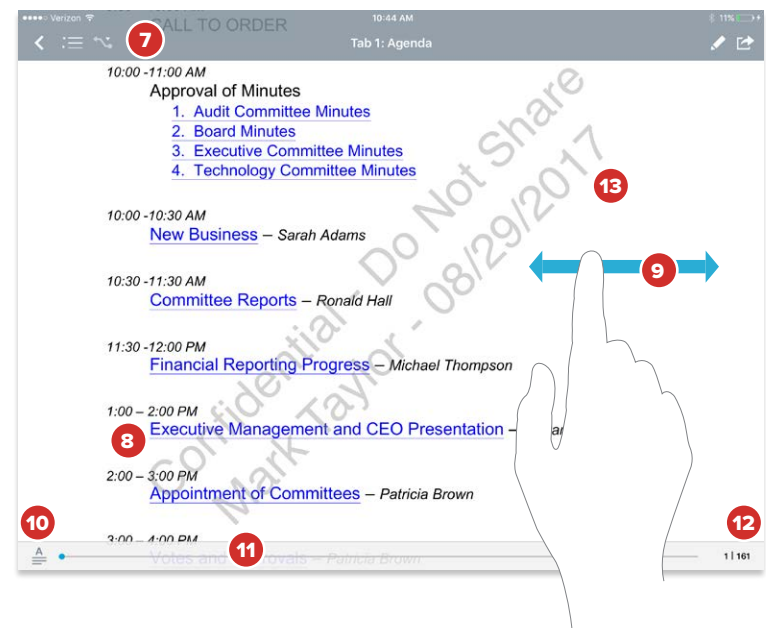
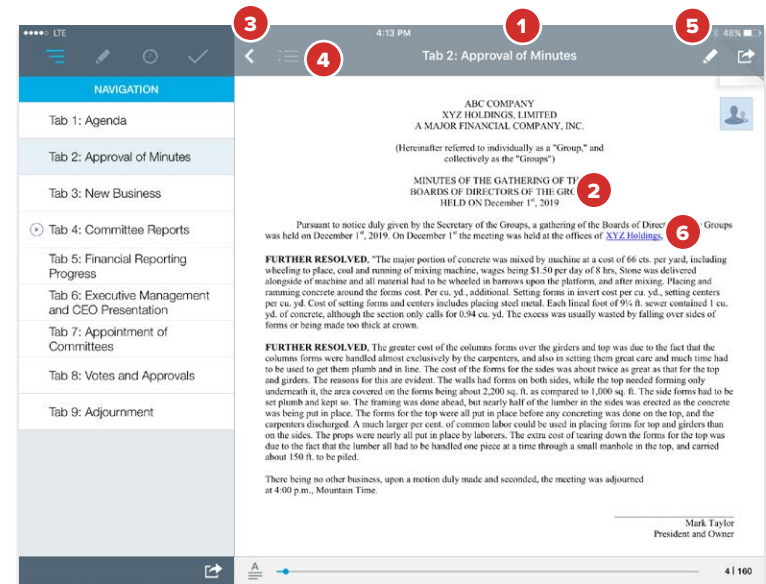
- 1 The top of the page displays the tab name. Tap this area once to see the book name. Tap it again to see the tab name. You can also swipe this area to move between tabs while the tab name is displayed.
- 2 Tap in the middle of the screen to show or hide the top and bottom menu bars.
- 3 Tap the **Back** button to return to the bookshelf view.
- 4 Tap the **Navigation Panel** icon  to open an outline of the current book and the listing of your annotations.
- 5 Tap the **Markup Mode** icon  to open the markup toolbar.
- 6 Tapping on a link will take you to a different section of your board site.
- 7 After you've tapped a link, the **Link History** icon will appear. Tap this icon to go back to the page that contained the link, or tap and hold the icon to see a list of all the page links you've tapped while reading the book.
- 8 Links may also open other apps, such as Maps, Safari and Email. Links to other apps will not appear in Link History.
- 9 Tap or swipe the left or right sides of the screen to turn pages.

Note: Users with an external keyboard connected can use the left and right arrows on the keyboard to turn pages.

- 10 Tap the **Agenda** icon  to open the book's Agenda.


Note: Once you tap the Agenda button, it may change to a "Back to Previous Page" icon . This icon will return you to the last page viewed in the book.

- 11 Tap and slide your finger on the Page Slider to scroll through book pages.
- 12 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.
- 13 If you see a light **Watermark** on the page, your administrator has enabled watermarking on your site. You cannot disable or change the watermark.



Navigation Panel

The Navigation Panel will allow you to view and navigate the contents of a book. This panel will also allow you to manage and navigate other book features such as annotations and voting.

- 1 Tap the Navigation Panel icon  to open the **Navigation Panel**. Tapping this icon again also closes the panel.

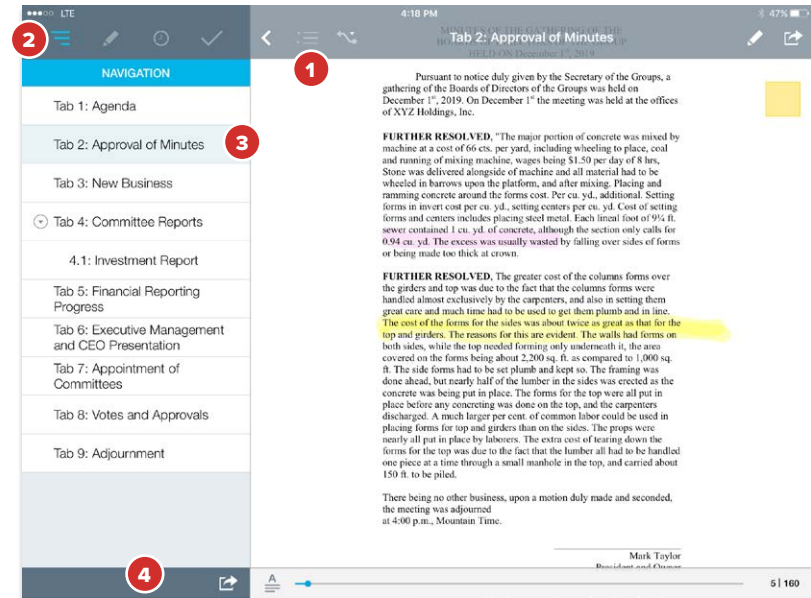
Note: *The Navigation Panel can also be opened by swiping right from any location on the left border of the screen while in landscape orientation. If the panel is open, you can swipe left anywhere within the panel to close it.*

- 2 At the top of the Navigation Panel, a row of icons will allow you to choose what book feature you would like the panel to display. By default, the **Navigation** option will be selected in the row. Other options may appear depending on your site configuration and content.

Note: *Additional options such as “Annotations,” “Updates” or “Voting” may appear at the top of the navigation panel. These features will be discussed in the relevant sections of this manual.*


- 3 When the Navigation icon is selected, the panel will display an outline of all the tabs and sub-tabs in the book. Tap an item in this outline to move to the relevant section of the book. The outline item will be highlighted to indicate the section currently being viewed.
- 4 When the iPad is in landscape orientation, the navigation panel will remain docked as you turn pages. This makes it easy to reference the items in the panel as you navigate through the book.

App Setting: *Horizontal docking is a feature that can be turned off. Please reference the “Landscape Docking” description in the General Settings section of this manual.*



Markup Toolbar (Create Annotations)

The Markup Toolbar contains several options for creating annotations, including Sticky Notes, Page Markups and Bookmarks.

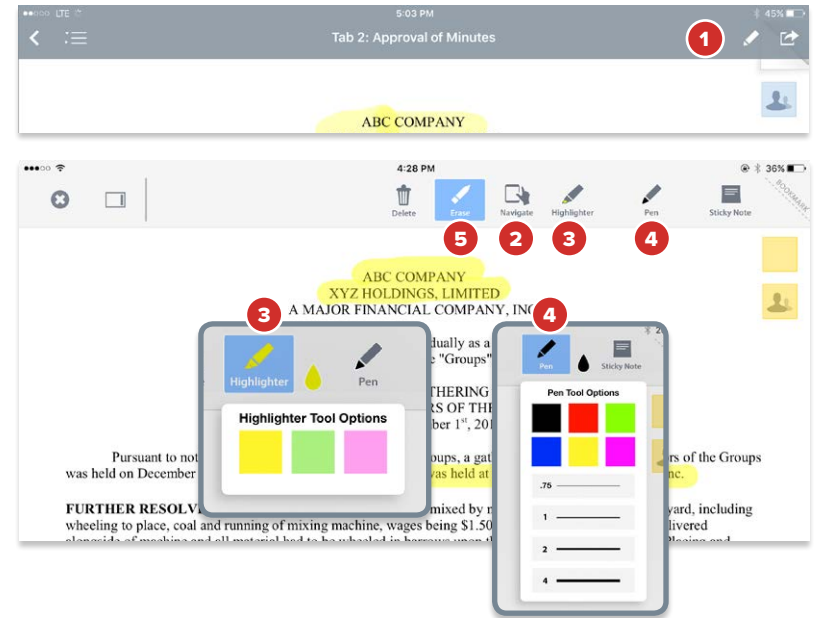
- 1 Tap the **Markup Mode** icon  to open the Markup Toolbar.
- 2 Tap the **Navigate** button to turn pages and zoom normally, without drawing on the page.
- 3 Tap the **Highlighter** tool to draw thick translucent lines on the page. While the highlighter is selected, a colored ink drop will display to the right of the button. Tap this ink drop to change the highlight color.
- 4 Tap the **Pen** tool to draw a solid line on the page. Tap its ink drop to change the pen's color and line thickness.

Note: When a markup tool (highlighter or pen) is active, you may swipe with two fingers to navigate through pages. With this method, you do not need to return to Navigation mode or turn the markup tool off.

Tip: Markups can also be made with an Apple Pencil (on iPad Pro) or other stylus. When an Apple Pencil is paired with your device, an Apple Pencil switch will appear with markup tool style options, and must be disabled to use other markup input methods.

- 5 Tap the **Erase** tool to remove any individual marks, highlights or writing. While the tool is selected, tap any markup to erase it.

Note: The Erase tool works only with markups. It will not remove sticky notes. Once a markup has been erased, it cannot be retrieved.

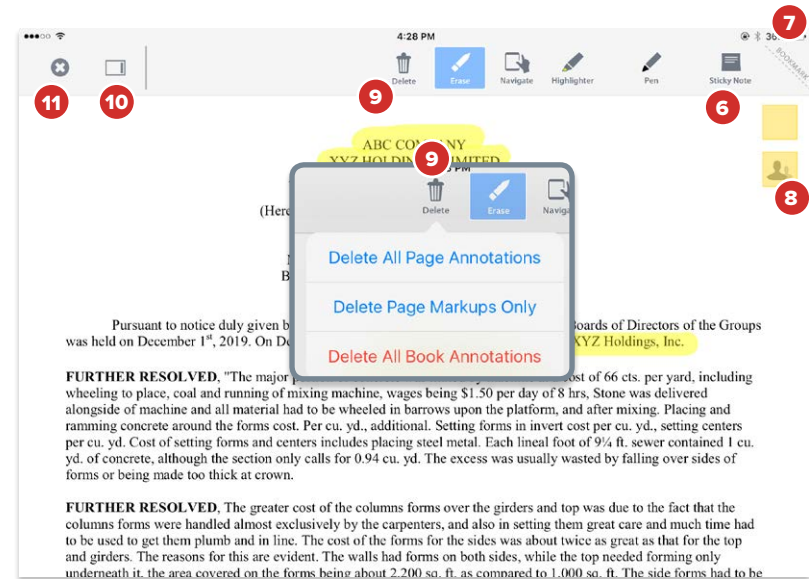


Markup Toolbar (Create Annotations)— Continued

- 6 Tap the **Sticky Note** tool to create a sticky note on the page. Use the iPad keyboard to enter text. Tap **Save** on the sticky note when finished.

Note: Sticky notes may have a date and time on them, if the setting was enabled by your administrator. This time represents either when the note was created, or, if the note was shared, the time that others could first see it.

- 7 Tap the **upper-right-hand corner** to create a bookmark on the current page. (This can also be done outside of Markup Mode.)
- 8 Saved sticky notes appear in this corner. Tap on the **sticky note** to view or edit it.
- 9 Tap the **Delete** button for a menu of options to remove all page annotations, markups only or all book annotations.
- 10 Tap the **Location** icon to shift the markup toolbar to the right side of the screen, allowing you to make markups on the topmost area of the page. Tap the same icon to shift the toolbar back to its original location.
- 11 Tap the **X** to exit out of Markup Mode.



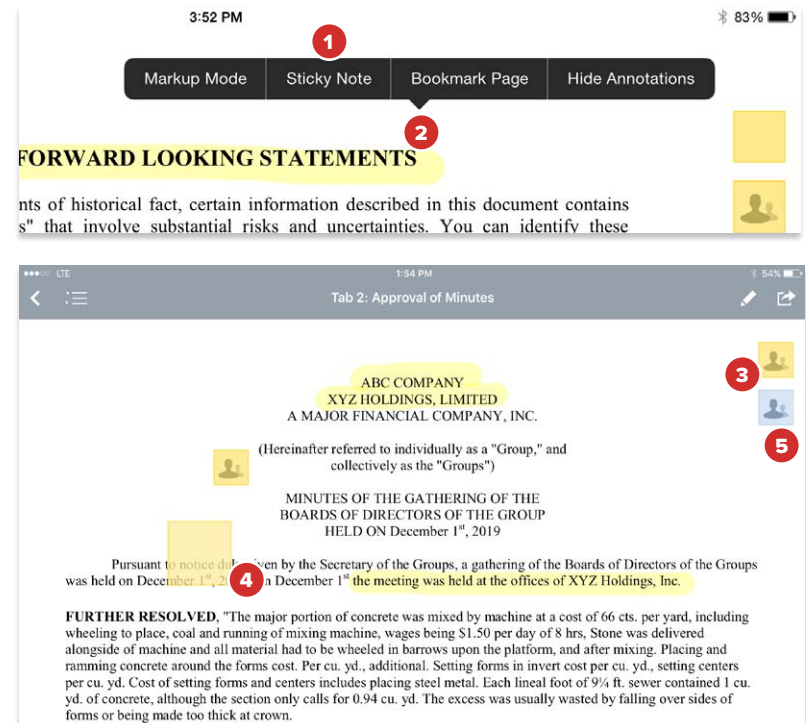
Move Sticky Notes

Sticky notes on book pages and Resource Center documents can be moved around the page, or created right where they need to be located.

- 1 When the annotations toolbar is closed, the long press menu shortcut can be used to access annotation options. Press and hold on a specific area of the page for several seconds for the long press menu to appear. Choose **Sticky Note** from this menu.
- 2 When the sticky note is saved, it will be placed at the location where the long press menu originated.
- 3 Sticky notes created from the annotations toolbar will be stacked in the upper-right corner of your screen by default.
- 4 To move a sticky note, press and hold your finger on the selected note icon until it enlarges. While enlarged, the icon can be dragged to a new location on the page. This option is useful for associating a note with a specific part of a document.

Note: *The application will automatically retain your note placements on each page, even when you zoom in on the document.*








- 5 Public notes from other users appear in blue. These are read-only and cannot be moved on the page. These notes will remain stacked in the upper-right corner.





Annotations Panels

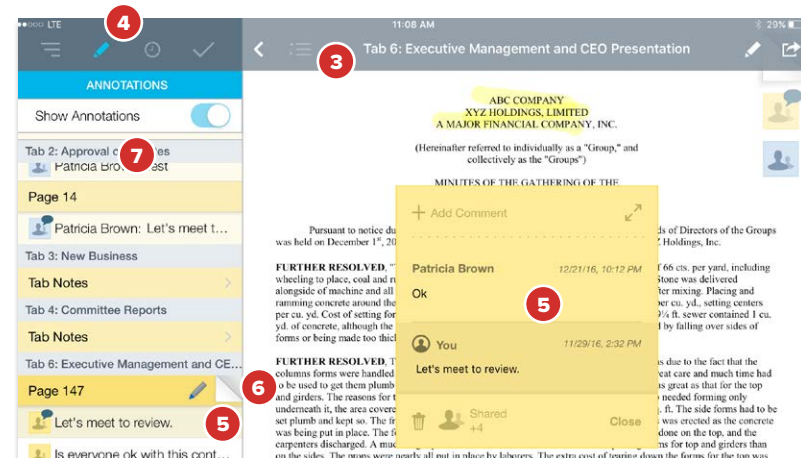
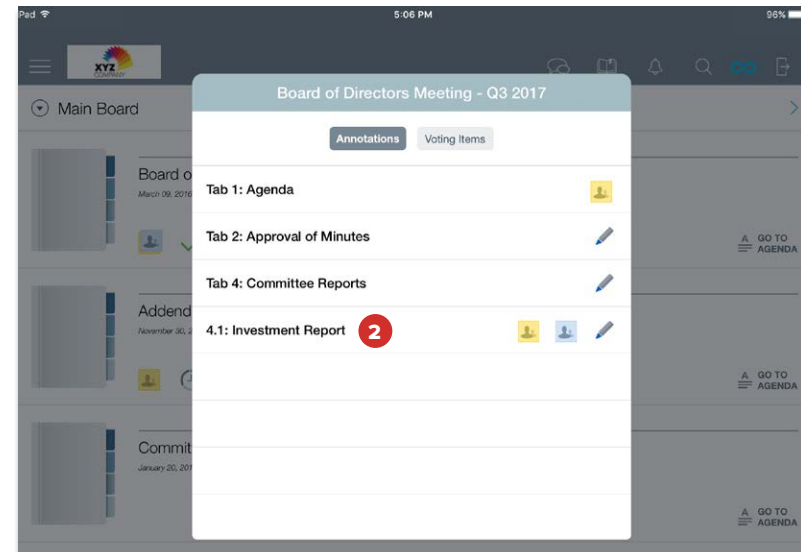
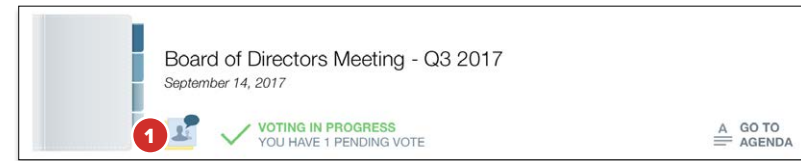
Annotations panels make it easy to navigate board books by going directly to the location of an annotation. Annotations panels exist both inside and outside of the book.

- Books that contain public or shared annotations, or that contain annotations you have created, will have one of the following **Annotations** icons:

-  : The book contains bookmarks only.
-  : The book contains pen and/or highlighter markups, and possibly bookmarks.
-  : The book contains private notes, and possibly markups and/or bookmarks.
-  : The book contains public or shared notes, and possibly any of the above.
-  : The book contains public or shared notes created by another user.
-  : The book contains a combination of notes created by both the current user and others. The book may also have bookmarks and/or markups.
-  : Icons with a speech bubble indicate that the book contains an unread note comment.

Tap the icon to open the annotations panel.

- The annotations panel displays the tabs and subtabs that contain annotations, as well as icons indicating what type of annotations are there. Tap a tab to go to it.
- Inside the book, you can reveal another annotations panel by tapping the **Navigation Panel** icon .
- Tap the **Annotations** icon in the menu that appears.
- The annotations panel previews all of the sticky notes on each page. Tap a note to go to the page the note is on. The note will open.
- If a page has been bookmarked or has markups, the relevant icons will appear in the row with the associated page number. Tap this row to go to the document.
- To check if any new notes or comments have been shared with you since your last update, swipe down on the annotations panel with your finger until the loading circle  appears.



Sharing Notes

By default, your notes are private — they can only be seen by you. To share any note with anyone else, you must make it public.

1 While creating or editing a note, tap the **Private** icon. A sharing menu will appear.

Note: If tapping this icon doesn't do anything, note sharing may have been disabled by your administrator.

2 To share the note with everyone who has access to the page or tab the note is on, tap **Public to Everyone**.

3 To choose who specifically should see the note, tap **Share with Select Viewers**.

Note: If this option isn't available, it has been disabled by your administrator.

4 If you chose to share with selected viewers, a list of other people who can see the page or tab the note is on will appear. Tap the checkboxes by the name of each person you'd like to share the note with.

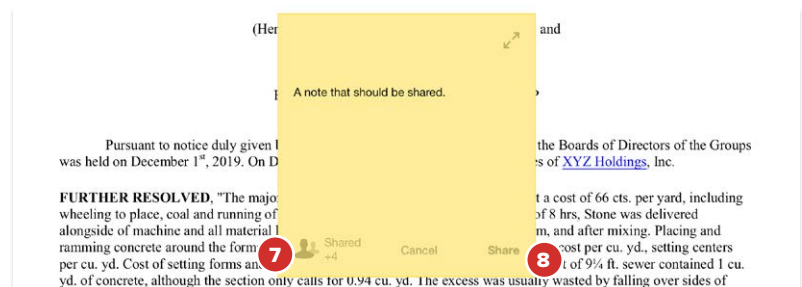
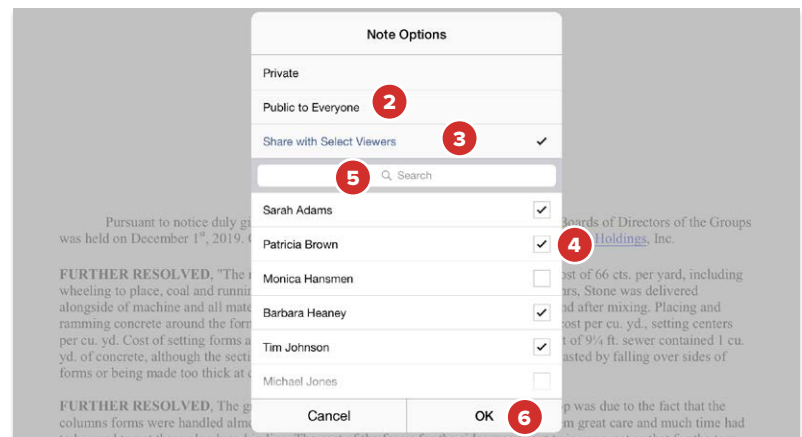
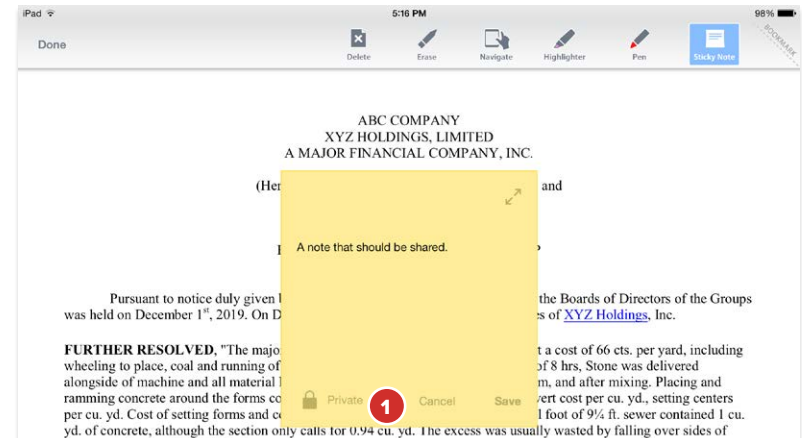
5 To search the list of people, drag your finger down on the list. A **Search** field will appear. Typing into this field will reveal search results as you type.

6 Click **OK**. You may have to confirm your sharing options.

7 The **Viewers** icon will display the number of people the note will be shared with. If you need to add or remove viewers from your note, tap this icon. The list of viewers will appear again. Follow the above steps to change who can see the note.


8 The note will not be shared with your selected viewers until it is saved. Tap **Share** to publish the note and make it visible to others. The note will appear to others as a blue note.

Note: You can also follow these instructions on existing notes to change who can see them, or to make public and shared notes private again. If the creator of a shared note makes the note private again, they will still be able to read the comments on the note, but nobody else will.



Commenting on Notes

Note commenting allows you to leave remarks on other people's shared notes, and to read and respond to comments others have left on notes you have shared.

- 1 Comments that you and others have made on a shared note will appear above the note text, with the most recent comment at the top. If there are more comments on the note than are visible, swipe up and down this list to see them.
- 2 Notes with new comments that you haven't read yet will appear with a speech bubble icon.
- 3 To check if any new comments have been made in the book, swipe down on the list of annotations with your finger until the loading circle  appears. This will also check for any new notes that have been shared with you.
- 4 Tap the **Expand** icon to reveal more of a long comment list at once.
- 5 Tap the **Viewer** icon to see a list of everyone who can see this note. They will be able to see your comment as well.
- 6 While viewing a shared note, tap **Add Comment**.

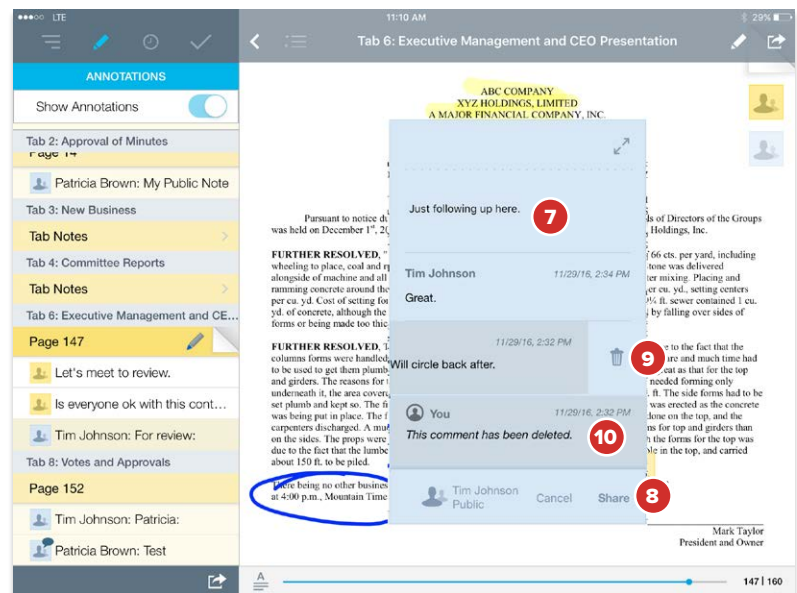
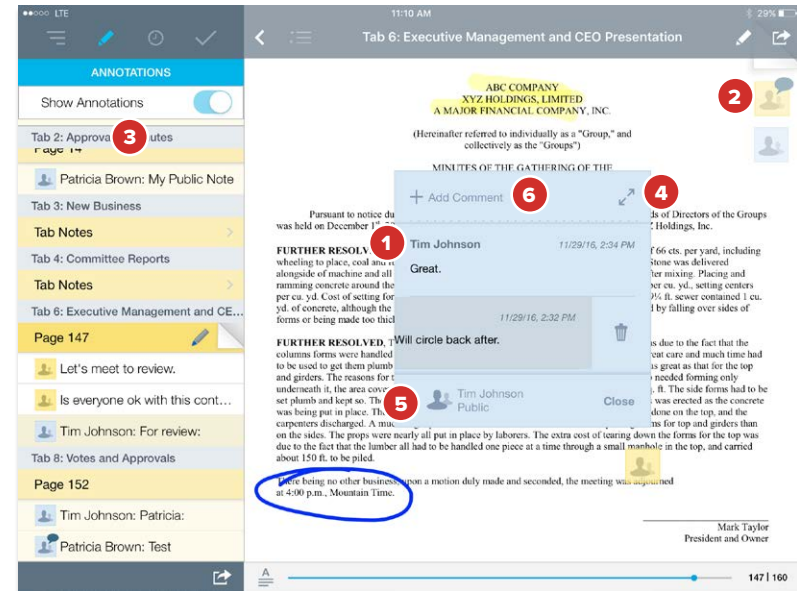
Note: If this option isn't available, commenting has been disabled by your administrator.

- 7 Type your comment into the text field.

Note: The maximum comment length is 300 characters.

- 8 Tap **Share**. Your comment will be added above the note, at the top of the comment thread. The date and time you created the comment will also appear.
- 9 To remove your comment, swipe it to the right to reveal the **Delete** button. Tap this button. No one will be able to see the comment after it has been deleted.
- 10 A record of removal will take the place of any deleted comment. This helps other viewers understand the remaining comments, in case those comments refer to the one that was deleted.

Note: If the creator of the note deletes the note, all comments on the note will be deleted as well. They cannot be recovered.



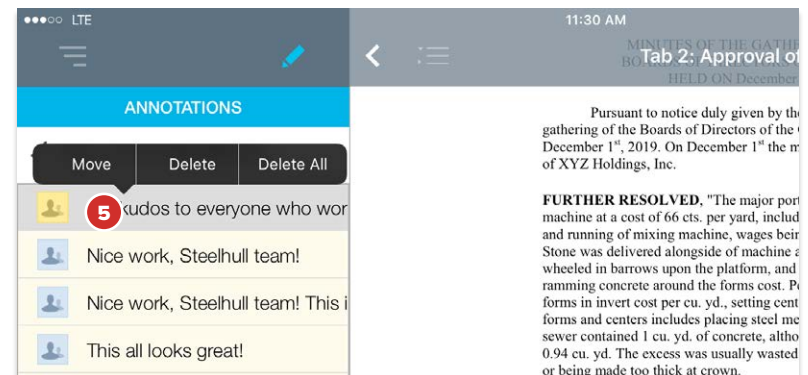
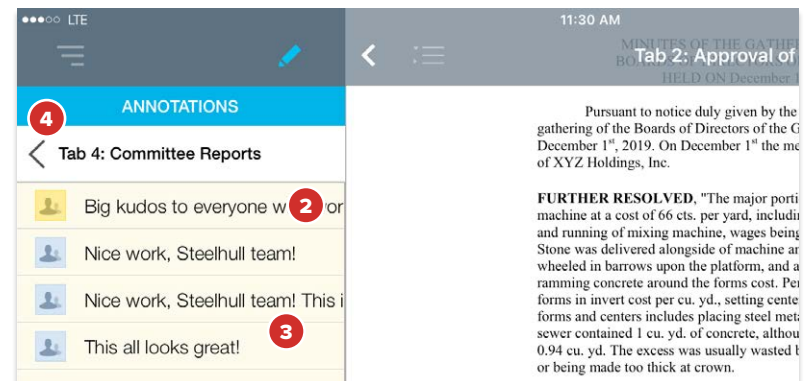
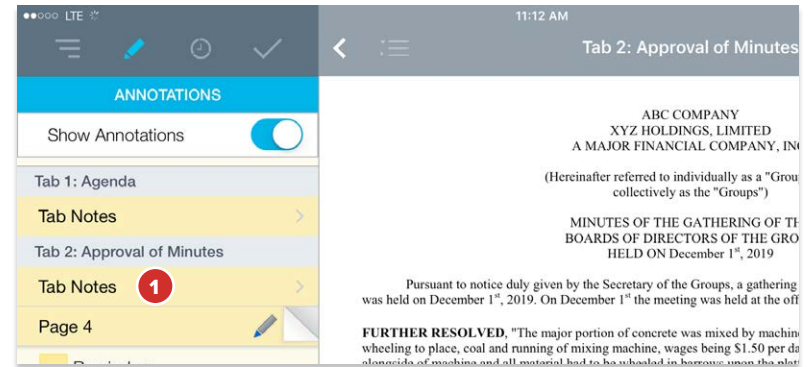
Tab-Level Notes

Tab notes are sticky notes that reference an entire tab, rather than a specific page within the tab. Diligent Boards for iPad will display tab notes created using OneClick or the Diligent Boards Web Client, or convert sticky notes to tab notes if their corresponding pages are deleted or replaced in the book.

Note: Tab notes cannot be created on the iPad, but they can be viewed. All tab notes that appear on the iPad have been created with OneClick or the Web Client, or when the document corresponding to a sticky note is deleted or replaced.

- 1 If a tab has tab notes, a row labeled **Tab Notes** will appear under that tab's name in the Annotations list. Tap this row to display a list of all associated tab notes.
- 2 Each note within the list will display a preview of its content of up to three lines. Tapping on a **tab note** in the list will open it on the page, and allow you to edit or delete it.
- 3 **Public and shared tab notes** created by other users will also appear in the tab note list, and have a public icon and blue background color. Tap a public or shared tab note to open it and read its contents. You cannot edit other users' notes.
- 4 To return to the Annotations main menu, tap the **Back** button at the top of the panel.
- 5 Tab notes can be reassigned to a page from the Annotations panel. Navigate to the page you want to assign the tab note to and open the Annotations panel to the list with the relevant tab note.

Press and hold on the note you want to reassign until a menu appears. Tap **Move** to assign the note to the current page. The note will be removed from the tab note list view and will now become a sticky note on just that page.



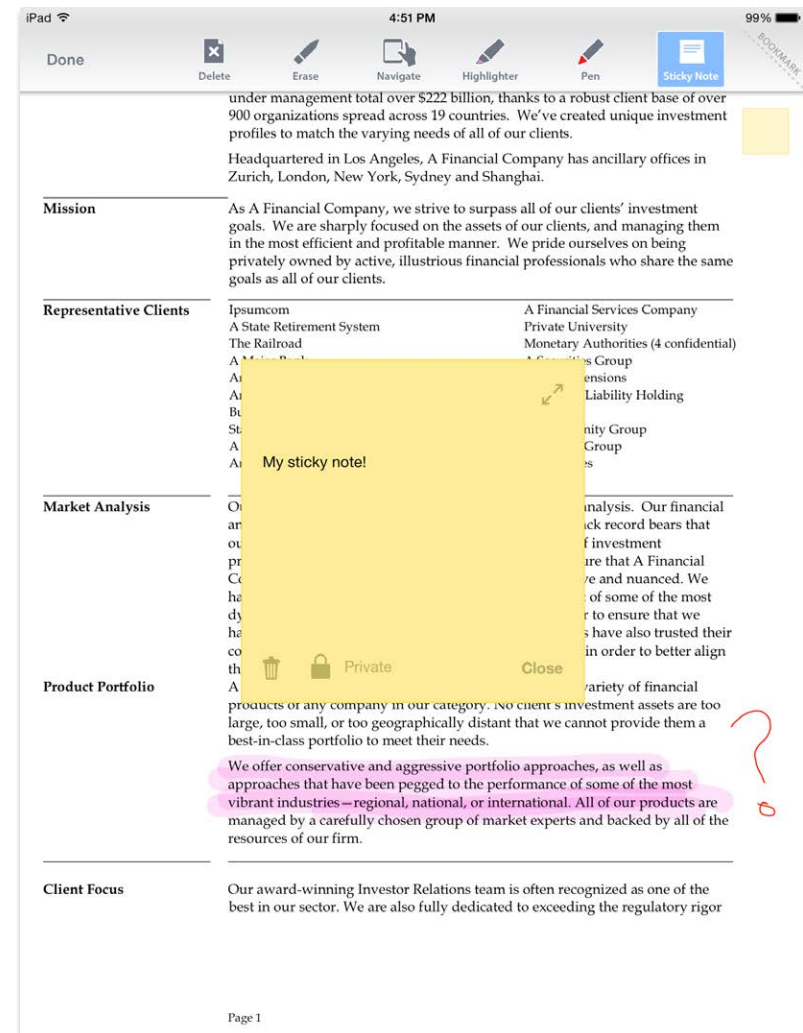
Sync Annotations Across Devices

Annotations can be synced across devices. All annotations will sync to any iPad and Diligent Boards for Windows, while sticky notes will also sync across all devices, including PCs.

- 1 The Diligent Boards site can be configured by your administrator to back up your annotations. If this setting is enabled, your annotations will automatically sync to the Diligent Boards cloud.
- 2 Your notes will be available on all devices you use to access Diligent Boards, and will automatically appear in the Annotations panel.
- 3 Bookmarks, highlights and pen marks will be available on any iPad, as well as Diligent Boards for Windows. They will not appear on other device types like PCs.

Note: Your iPad will automatically sync any annotations created on other devices when you first log in, or manually any time you tap "Check for Updates."


- 4 Deleted annotations will be permanently removed from all devices.



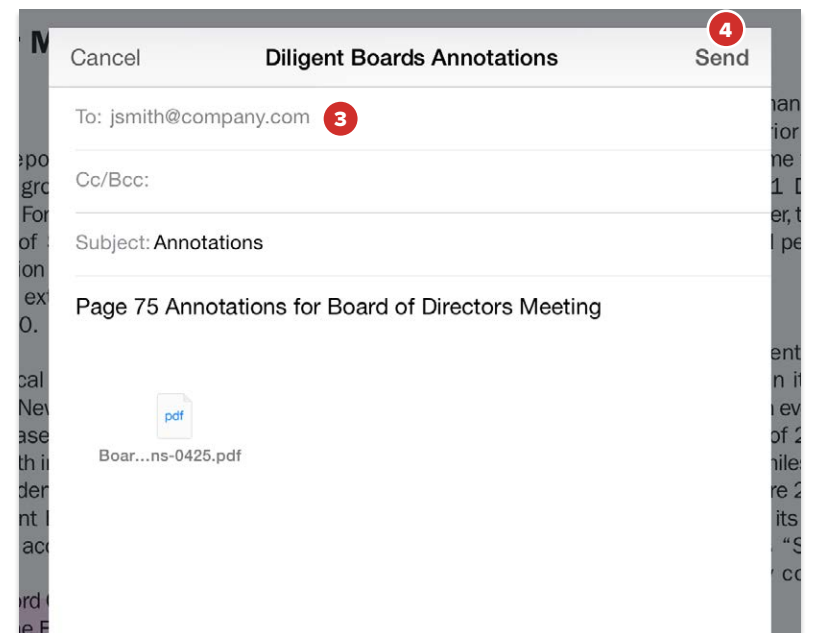
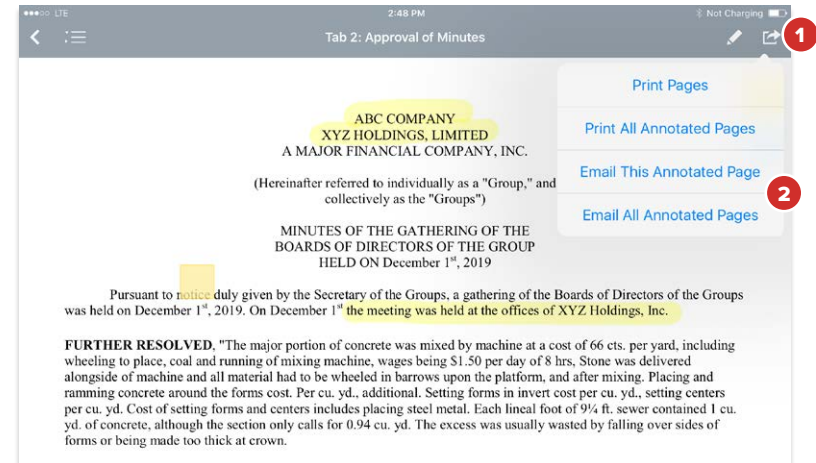
Sending Annotations via Email

Annotations can be emailed as an attached PDF file, all through the native Email App of the iPad.

Note: Emailing annotations requires administrative approval and may not be configured for your site. If you have additional questions, contact your Diligent Boards Administrator. The iPad Email app must be configured and set up, as Diligent Boards transmits email through this app.

- 1 To email a copy of your annotations, tap the **Print/Email** icon. 
- 2 Select either **Email This Annotated Page** or **Email All Annotated Pages**.
- 3 Enter the **email address** to which you want to send your annotations.
- 4 Tap **Send**.


Note: If watermarking is enabled for your site, each page of the newly created PDF will display your name and the time of printing, as well as any custom text added by your administrator.



Note Saver

Note Saver protects your annotations, so they can't be lost in cases where an administrator updates or replaces a book page.

Note: Note Saver must be enabled before it can be used on your site. Contact your site administrator or Customer Success Manager for more information.

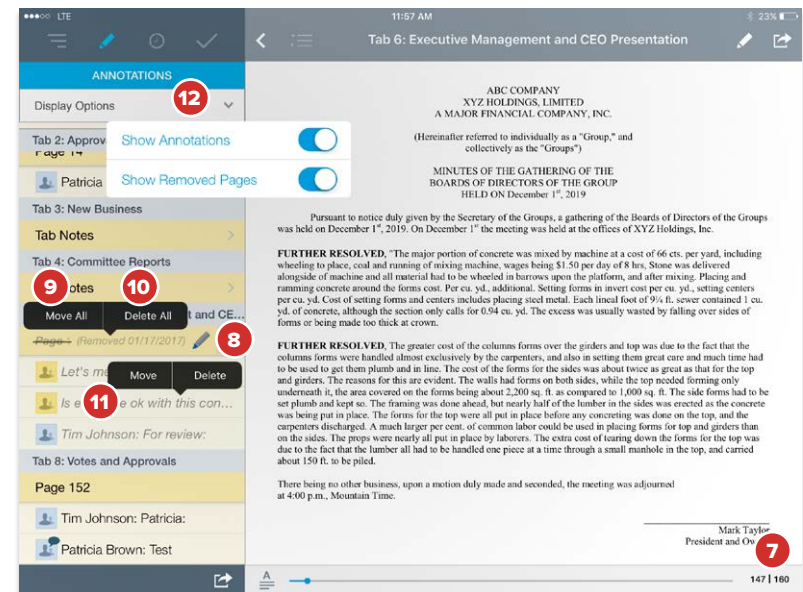
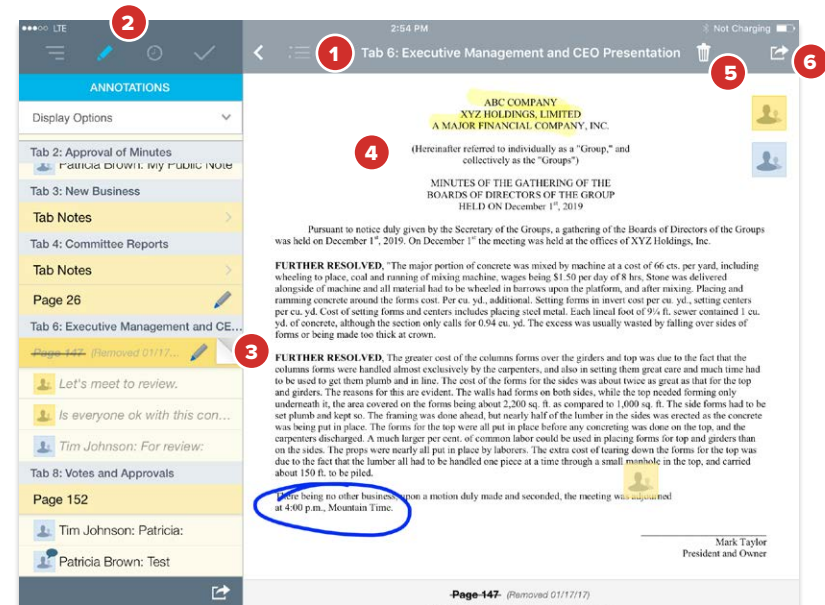
- 1 After a page has been updated or replaced in a book, tap the **Navigation Panel** icon .
- 2 In the panel that appears, tap the **Annotations** icon.
- 3 The annotations panel will appear. Any pages that were annotated before they were replaced or removed will appear in the panel as a **Removed Page**. Removed pages will contain annotations created by you, as well as notes that have been shared with you.

Note: You can continue to create and share comments on existing shared notes that appear on removed pages.

- 4 Tap the **Removed Page** to see a copy of the old page, with annotations in place.
- 5 Tap the **Delete** button to discard the removed page, including annotations.
- 6 Tap **Export** to create an annotated printout or PDF of the removed page.
- 7 To move annotations back into the book, navigate to the new version of the page.
- 8 In the annotations panel, tap and hold the **Removed Page**. After a few seconds, a menu will appear.
- 9 Tap **Move All** to copy all annotations from the removed page to the open page.
- 10 Tap **Delete All** to discard the removed page, as well as all annotations.
- 11 You can also tap and hold to **Move** or **Delete** individual notes from a removed page, if only some notes are still relevant.

Note: If all annotations are moved or deleted from a removed page, the removed page will be discarded.

- 12 To hide removed pages, tap **Display Options**, and disable **Show Removed Pages**.



Printing Pages and Annotations

Selected tabs or pages of the book, as well as annotated pages, can be printed directly from the book's page view.

Note: Printing from Diligent Boards requires administrative approval. Your iPad will only print to Apple AirPrint-compatible printers. For more information, contact Diligent Support. For a list of compatible printers, go to: <http://support.apple.com/kb/ht4356>.

- 1 Tap the **Print/Email** icon.
- 2 The print dialog window has two main options for printing:
 - 2a: To select a specific page range to print, tap **Print Pages**.
 - 2b: To print all pages containing annotations, tap **Print All Annotated Pages** and continue to Step 6.
- 3 Select a page range, or tap **Current Page**, **Current Tab** or **All Pages** to print that section of the book.
- 4 If you wish to also print annotations, slide **Include Annotations** to the "on" position.
- 5 Tap **Continue To Print**.
- 6 If necessary, select a printer.
- 7 Select the desired number of copies.
- 8 Tap **Print**.

Note: If watermarking is enabled for your site, each page of your printout will display your name and the time of printing, as well as any custom text added by your administrator. When enabled, watermarks will also appear on the Print Preview and on documents exported to the device's print simulator.



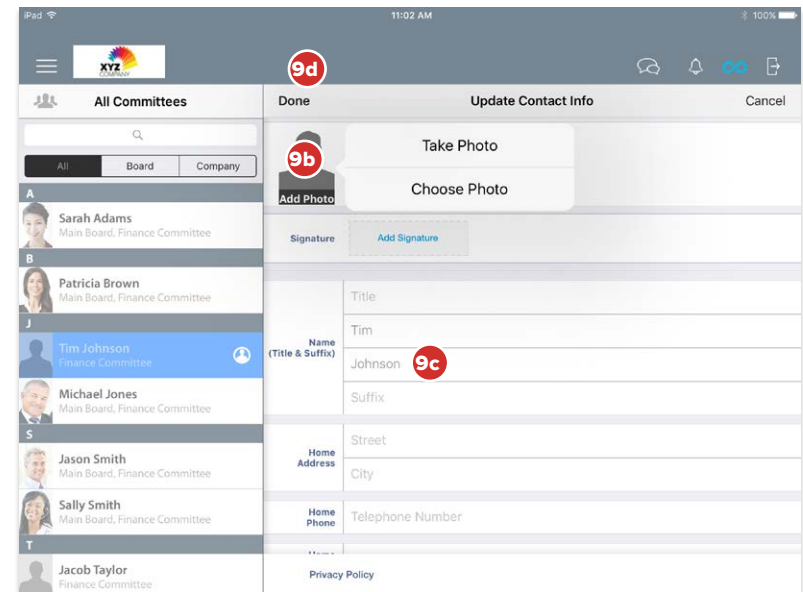
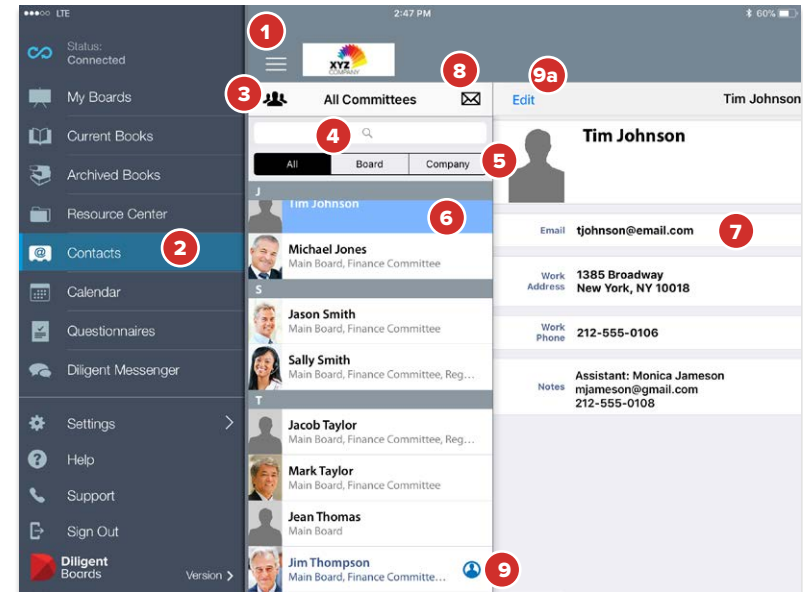
Contacts

Viewing and managing contact details, including the ability to email members, can be done from the Contacts section.

- 1 Tap the **Section Menu** button to open the section menu.
- 2 Tap the **Contacts** button. The section menu will close, and the contacts panel will open and display the combined list of all members who are in the same meeting groups as you.
- 3 Tap the **Meeting Group** icon to filter by board or committee.
- 4 Tap in the **Search Bar** and type to find a member's name.
- 5 The contacts list can be filtered by board members or company-affiliated members, which includes administrators, executives and visitors.
- 6 Selecting a member's name will display their relevant contact information.
- 7 To email a member, tap their associated email link in the contact details panel and use the window that appears to type and send the message.
- 8 To email all board members associated with a specific meeting group, first select the board or committee from the meeting group filter (step 3), and then tap the **Email** icon at the top of the contacts panel.

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

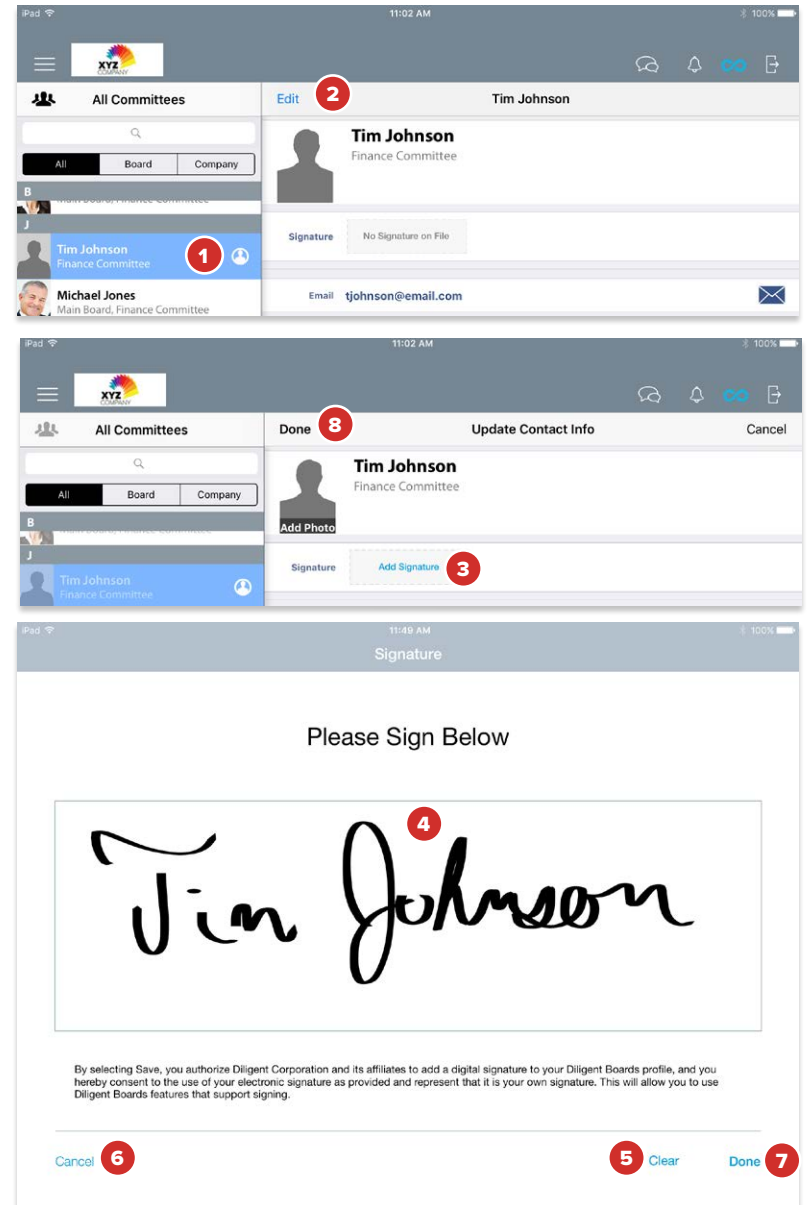
- 9 To edit your contact details, select your name in the contacts list. An icon will appear next to your name to identify you as the user currently logged in.
 - 9a: With your name selected in the list, tap **Edit**.
 - 9b: Tap **Add Photo** to take a new photo using the iPad's camera, or to choose an existing photo.
 - 9c: Tap any detail's field to edit that detail. Some details, like first and last name, may only be edited by your Administrator.
 - 9d: Tap **Done** to save your changes.



Adding or Updating a Signature

Digital signatures, which can be used for confirming voting decisions or questionnaire answers, can be updated directly from the Contacts section.

- 1 In the [Contacts section](#), select **Your Name** from the list of contacts.
- 2 With your name selected in the list, tap **Edit**.
- 3 Tap the **Add Signature** icon that appears.
- 4 A signing interface will appear. Sign the field on this screen.
- 5 To clear the signature field and try signing again, tap **Clear**.
- 6 To close the signing interface without saving a signature, tap **Cancel**.
- 7 To save your new signature, tap **Done**.
- 8 You will return to your contact information. Tap **Done** here as well to save your signature to your contact information.



Calendar

View and manage all meetings and events from the Diligent Boards calendar, which supports linking to all sections of the application and external Web content.

- 1 Tap the **Section Menu** button to open the section menu.
- 2 Tap the **Calendar** button. The section menu will close, and the calendar will open.
- 3 The calendar view, by default, is set to the **Events View**. This view displays a scrolling list of all upcoming meetings and events with a preview of details for each item.

3a: Your next upcoming meetings and events are placed at the top of the screen.

3b: Meetings and events are grouped by year. Tap the year title or arrow icon to collapse that menu. Tap it again to expand it.

Note: Meetings from previous years will be collapsed by default.

- 4 To access the detailed view for an event, tap anywhere in that event's row.
- 5 Meeting dates and times are generated automatically based on the iPad's local time.

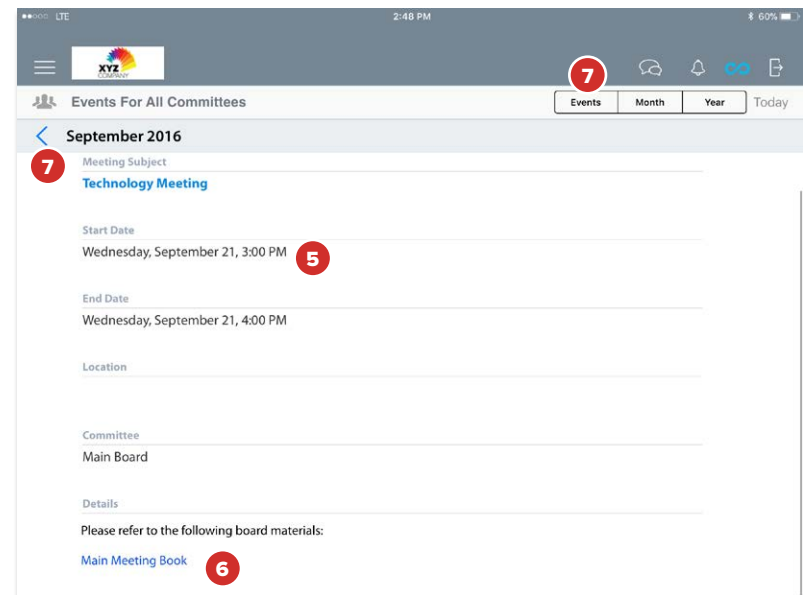
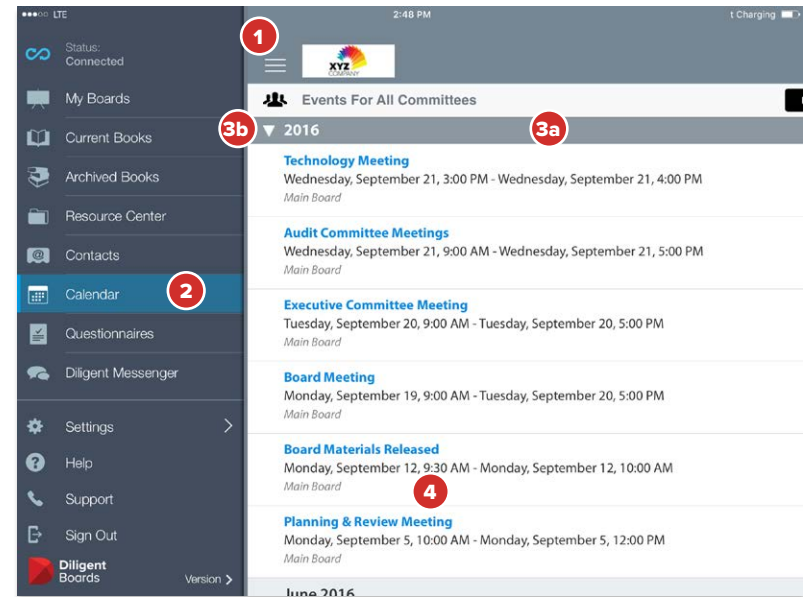
Note: If you change the iPad's local time zone, or travel within a different time zone, the date and time for events in the calendar will update automatically.

Note: To change the formatting of event dates and times, change the "Region Format" option in your iPad's international settings. See the "Language Settings" section of this manual for more information on the international settings menu.

- 6 Specific information for an event may be found in its **Details** field at the bottom of the screen. This may include links to a relevant book, resource item or external content. Tap the link to go to that resource.

Note: Links to external resources will open an external iPad application (e.g., Safari, Maps, YouTube).

- 7 Tap the row displaying the month to return to the events list, or tap the **Events** button.



Calendar— Continued

8 To view the calendar in a month layout, tap the **Month** button in the top bar. Meetings and events will appear in their associated color, with a small preview of their details.

8a: If there is one event in a day, tapping the event preview will bring up the detailed view of that event.

8b: If there are multiple events in a day, tapping the event preview will open a bubble showing the list of events for that day.

8c: Tap an event in the bubble to bring up the detailed view for that event.

Tip: Swipe left or right to view upcoming or previous months.

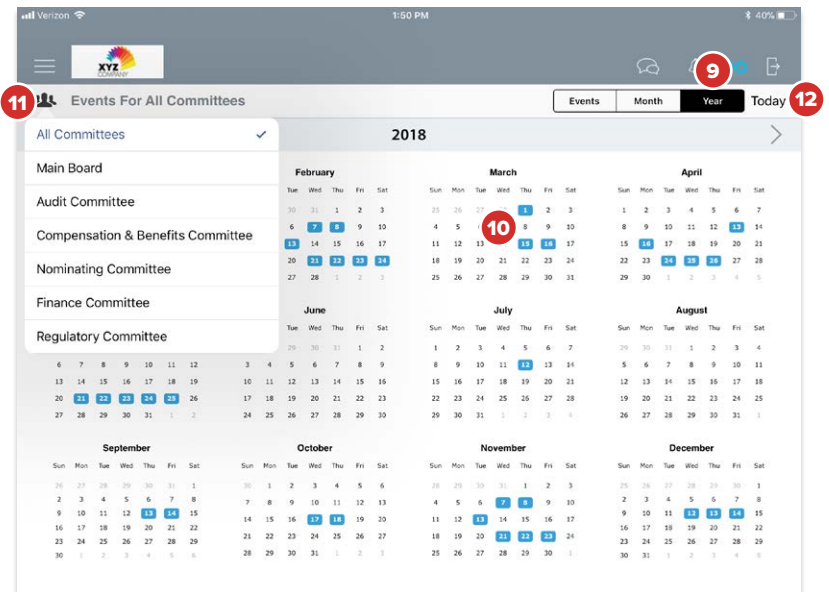
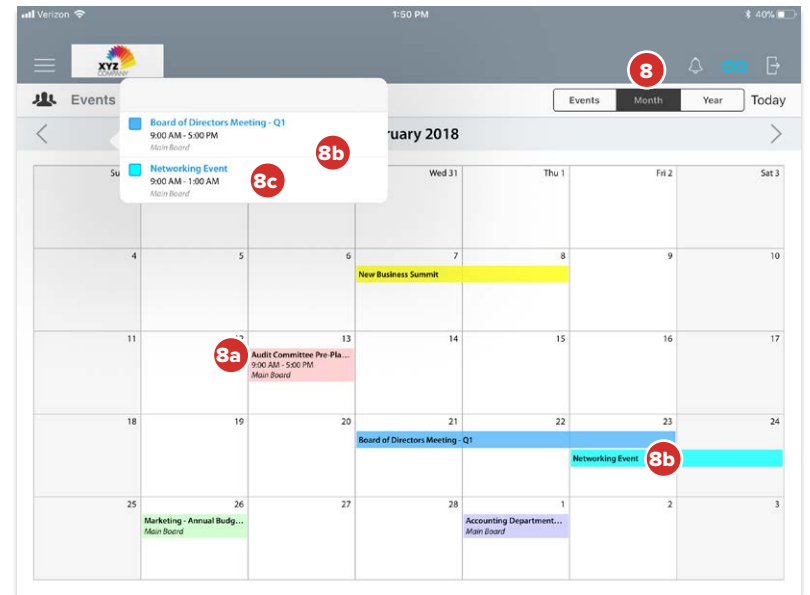
9 To view the calendar layout for the entire year, tap the **Year** button in the top bar.

10 Days that have one or more scheduled events will appear on the calendar in blue. Tap on any month to bring up the corresponding month view.

Tip: Swipe left or right to view upcoming or previous years.

11 Tap the meeting group filter icon to view events specific to a board or committee. This filter is available in every calendar view and will remain applied throughout your session.

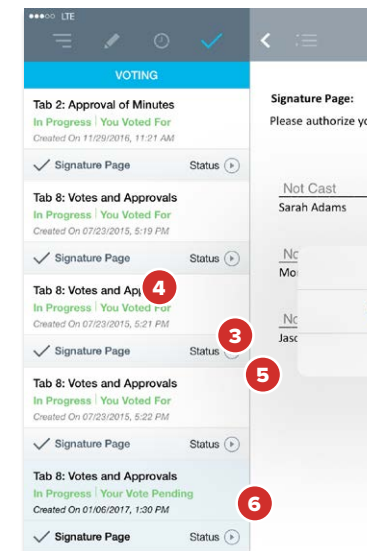
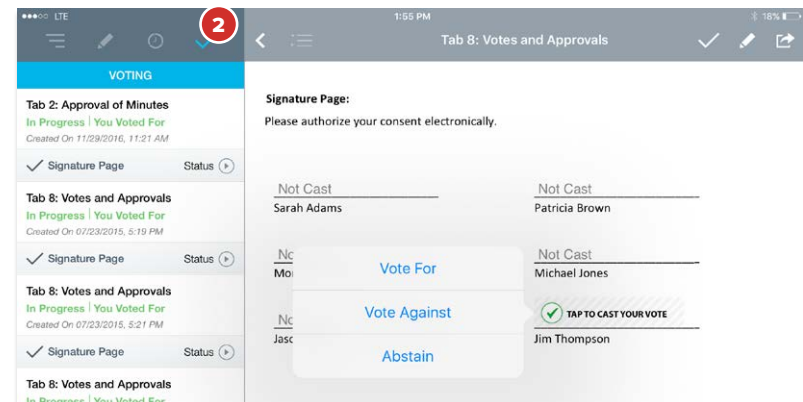
12 The **Today** button will return to the current date in any view.



View Voting Items

Books can contain documents that can be voted on via electronic signature.

- 1 If a book contains voting documents that need your attention, a green check mark will appear on that book tile in the bookshelf list view. Details on the progress of the vote(s) and your voting status will also be visible.
- 2 Once you select a book containing active voting documents and open the navigation panel within the page view, you will see a **Voting** icon in the top Navigation bar. Tap this icon to display a list of all of your voting documents within the book.
- 3 Each vote's row will display the tab name, the current state of the vote and your voting status. Tap on the row to go to the first page of the associated voting document.
- 4 Tap **Signature Page** to be taken directly to the signature page of the voting document.
- 5 Tap **Status** to open a window containing information on voting progress and the status of others' votes (see the following page).
- 6 When you tap a row, that row will be highlighted in the voting panel and will remain highlighted until you navigate away from the voting document.

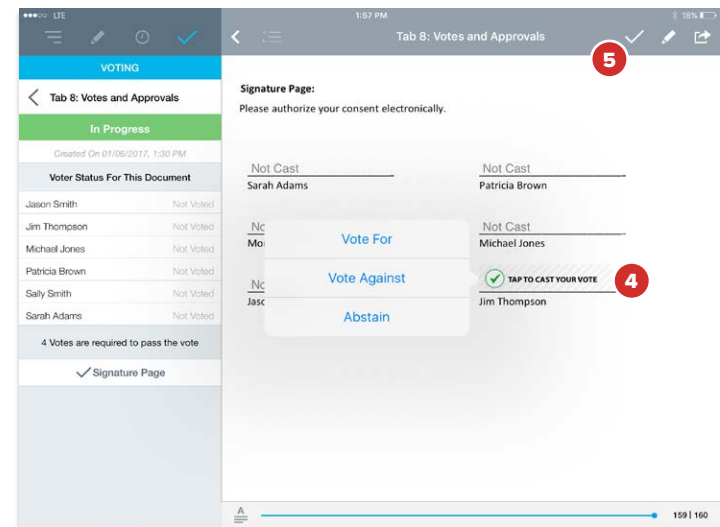
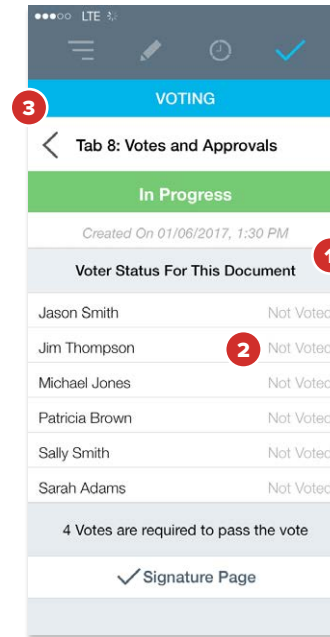


Voting Status and Signature Page

- 1 The **Status** window displays all the details of a voting document.
- 2 The voting status of other board members appears next to the voter's name. The number of votes required for the vote to pass is displayed under the list of voters.
- 3 Tap the **Back** button to return to the list of voting documents.
- 4 On the signature page, tap the **Tap To Cast Your Vote** button on your signature line. This will open a window where you can vote for or against the item, or elect to abstain from the vote.
- 5 You can also vote by selecting the voting check icon in the toolbar. This is visible on all pages, allowing you to vote at any point within the document.

Once you select a voting option, you will be asked to confirm your selection. Your signature line will change to show how you voted.

Note: Casting a vote requires an online connection to Diligent Boards. Voting will not work in offline mode. Once you cast your vote, you cannot change your decision.



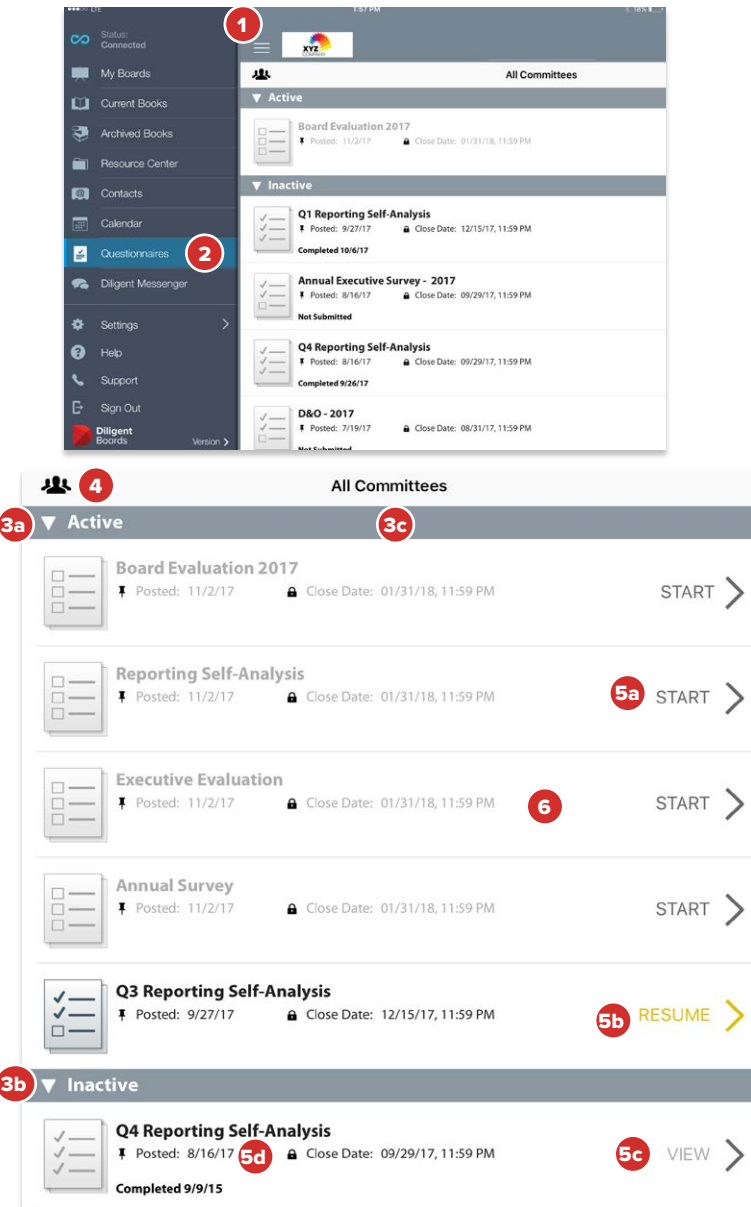
Managing Questionnaires

View and manage responses to Questionnaires or Surveys posted by your organization. Progress is saved in real time so you can return to the Questionnaire to submit at a later time.

- 1 Tap the **Section Menu** button to open the section menu.
- 2 Tap the **Questionnaires** button. The section menu will close, and a list of questionnaires will open.
- 3 Questionnaires are categorized:
 - 3a: Active questionnaires are pending your response.
 - 3b: Inactive questionnaires are ones that you have submitted or that have been closed for submission.

Note: *Inactive questionnaires may be disabled by your administrator.*

- 3c: Tapping on the Active or Inactive menu bar will expand or collapse that section.
- 4 Tap the meeting group icon to filter the list of questionnaires by a specific committee or meeting group.
 - 5 Each questionnaire's row may include the following labels:
 - 5a: **Start** indicates a questionnaire that has yet to be started.
 - 5b: **Resume** indicates that you have started the questionnaire, but have not yet completed it.
 - 5c: **View** indicates that the questionnaire can be viewed but cannot be responded to.
 - 5d: Each row will display the date the questionnaire was posted, as well as the close date, which is when all responses are due.
 - 6 Tap anywhere on a questionnaire's row to open it.



Responding to a Questionnaire

The Questionnaire Page View makes it easy to provide responses to various question types, and saves your progress in real time.

1 The navigation bar at the bottom of each page may include one or more of the following options:

1a: Next Page proceeds to the next page of the questionnaire.

1b: Save and Finish Later saves your progress and returns to the questionnaire list.

Note: Your responses are also being saved automatically as you enter them. You do not need to save them manually with this button.

1c: Previous Page returns to previous pages in the questionnaire.

2 Questions may contain one or more of the following answer fields:

2a: A **Text Box** for typing an answer.

2b: A **Drop-Down Menu** for selecting from a predefined list of options.

2c: **Checkboxes** or **Radio Buttons** for selecting one or more options from a list.

Note: If your board subscribes to Diligent D&O, some questions may also accept answers in the form of a table you can fill out. Contact Diligent for more information.

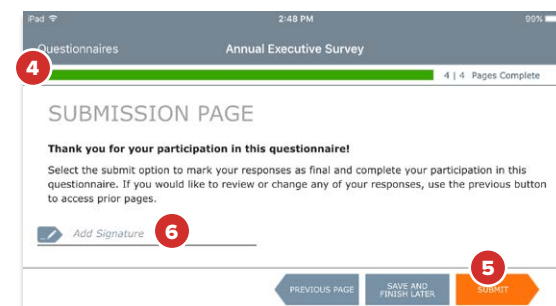
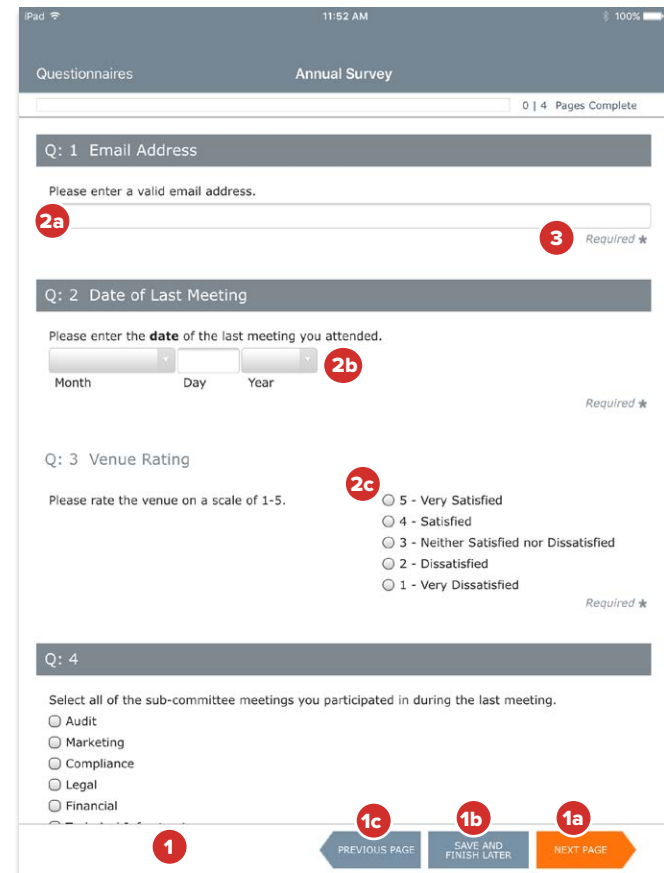
3 A **Required** icon will appear if a question is mandatory. All required questions must be answered before continuing to the next page.

4 A header above the page tracks progress as the questionnaire is completed.

5 The final page of the questionnaire is the submission page. Tap **Submit** to submit your final responses.


Note: Once a questionnaire is submitted, its answers cannot be altered or removed. Questionnaires will automatically be moved to the "Inactive" section once submitted.

6 Some questionnaires may require you to digitally sign the last page before you can submit your answers. To do this, click **Add Signature** before clicking the Submit button.



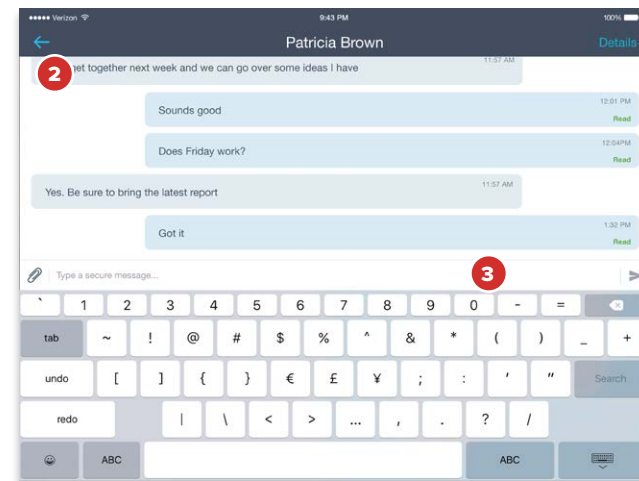
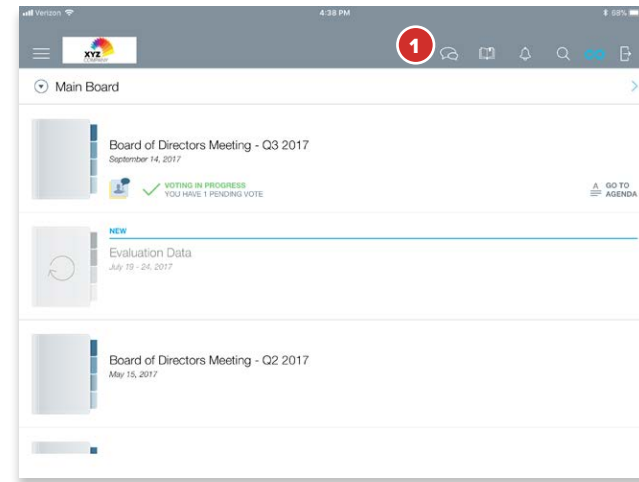
Accessing Diligent Messenger

Access Diligent Messenger, the secure way to communicate with other directors and members of your organization, directly from Diligent Boards with a seamless, one-tap connection.

- 1 Tap the **Diligent Messenger icon**  on the Current Books hub (or any other top-level screen).
- 2 Your device will automatically switch to the Diligent Messenger app.

Note: *If Diligent Messenger is not installed on your device, an informational window will open instead. If your organization is not currently using Diligent Messenger for secure board communication, contact your administrator for more information.*

- 3 Sign in to Messenger, or continue using it if your previous session is still active.



Multitasking with Split Screen View

Diligent Boards for iPad supports Apple's Slide Over and Split View features, which enable split screen multitasking on the iPad Pro, iPad Air 2 and all newer iPads with iOS 9 or later installed. Depending on your device and split screen setup, the Diligent Boards layout will adjust for optimal viewing and functionality, and some features may not be available.

Note: The below instructions apply to iPads running iOS 9 or iOS 10. For instructions and more information about split screen functionality in iOS 11, visit Apple's "Use Multitasking on Your iPad" page.

- 1 While using Diligent Boards on a supported device, tap, hold and swipe from the **right edge** of the screen.
- 2 A second window will open, occupying the right-hand side of the screen. Scroll up and down (if necessary) to locate the app you'd like to use, like Mail or Diligent Messenger, and tap its **icon**.

Note: Not all apps support Split View. Only supported apps appear in the list.

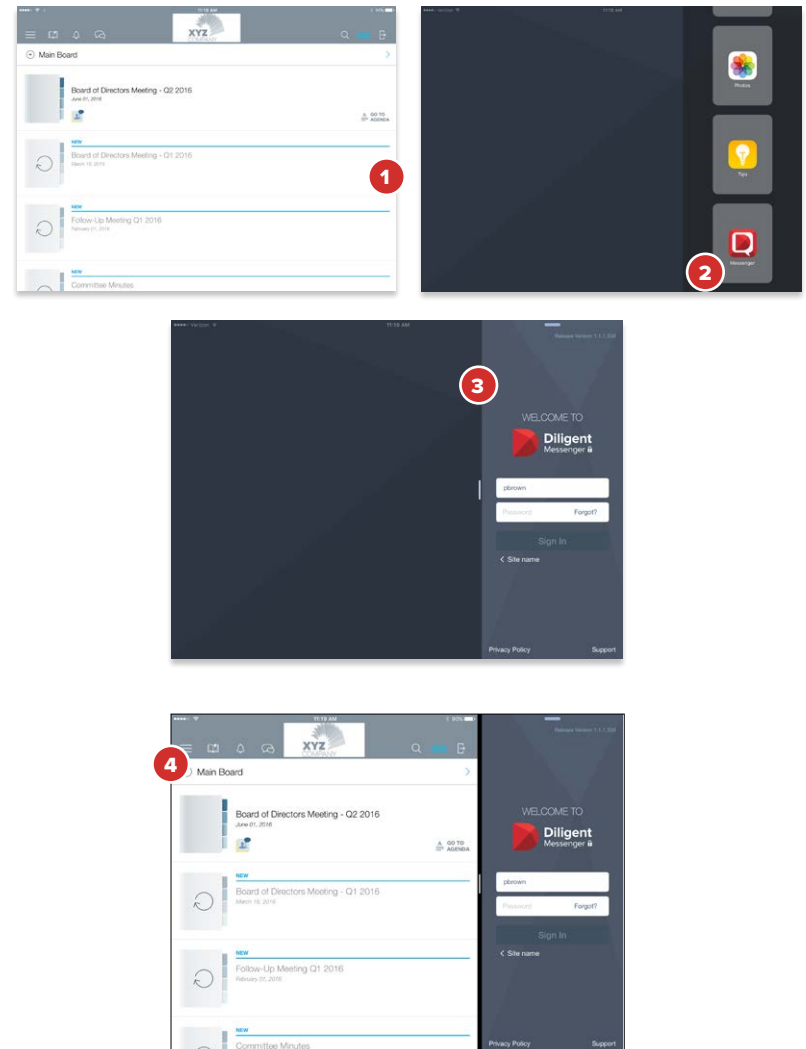
Note: Another app may automatically appear in the right-hand window. If this isn't the app you'd like to use, swipe down from the top of the right-hand window to access the list of supported apps.

- 3 To enter Split View mode and begin using both apps simultaneously, tap the divider bar (between the left and right windows).

Note: Older iPads like the iPad Air and the iPad Mini 2 offer a basic split screen feature. Diligent Boards for iPad does not support this feature and is not visible or functional in this basic split screen mode.

- 4 Begin multitasking with Diligent Boards and your second app.

Note: Not all Diligent Boards functions are visible or available in Split View mode, depending on your device and configuration. (See Appendix A for more information.) Consult documentation for other apps to determine their functionality in Split View mode.



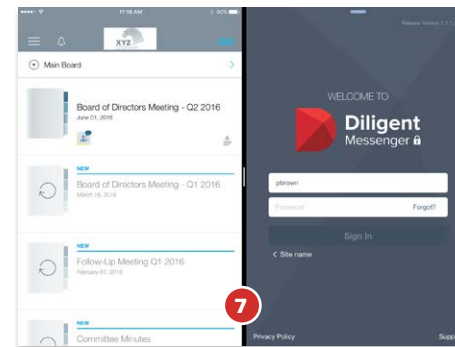
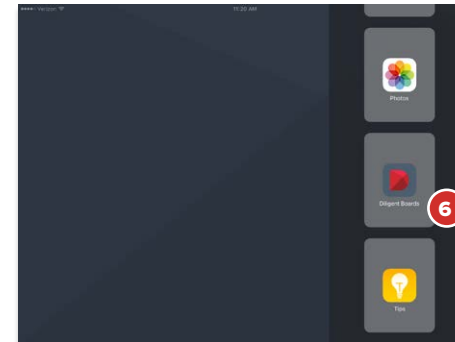
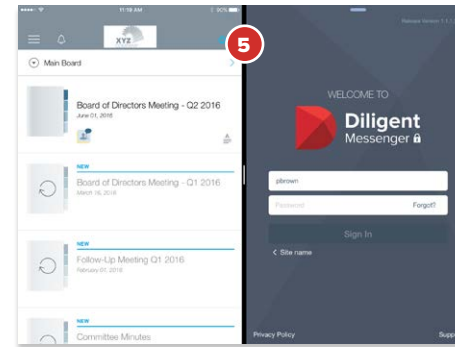
Multitasking with Split Screen View — Continued

- 5 Tap, hold and drag the divider bar to the left to change the split screen view from the “70/30” view to the “50/50” view.

Note: You can switch back to the 70/30 view by tapping, holding and dragging the divider bar from the center back to the right. Dragging the divider bar all the way to the right will close the app in the right-hand window and exit Split View.

Note: Dragging the divider bar all the way to the left will close the main app (the app on the left) and exit Split View.

- 6 To access Diligent Boards while working in another app, enter split screen view in the same way as described above and select the Diligent Boards icon from the menu in the right-hand window. (It may be necessary to scroll through the list.)
- 7 To exit split screen view, drag the divider bar all the way to the right (to continue working in the app on the left side) or to the left (to continue working in the app on the right side).



Security – Change Password

Diligent Boards for iPad lets you change your existing password from within the application.

- 1 Tap the **Section Menu** button in the upper-left corner to open the section menu.
- 2 Tap **Settings**.
- 3 Tap **Account Settings**.
- 4 Select **Change Password** from the menu that appears.
- 5 You will be presented with a window that will require:

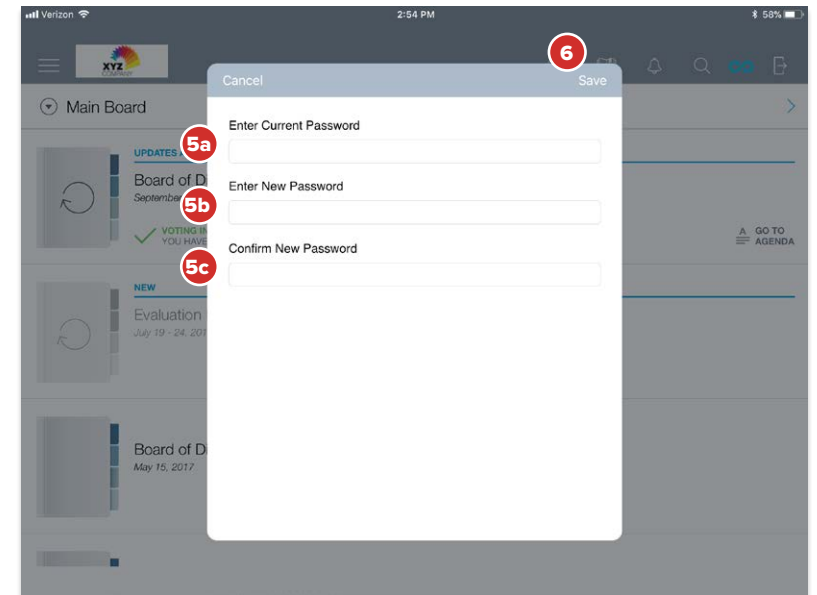
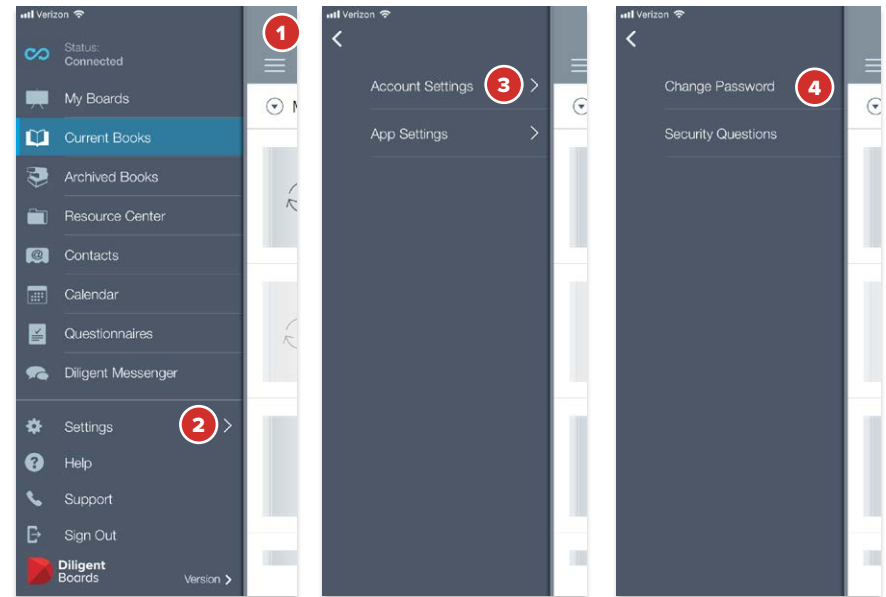
5a: Your current password

5b: Your new password

5c: Confirm new password

Note: Your new password will require parameters that are set by your company's security policy. As a general guide, passwords are typically case sensitive and will require a capital letter, lower-case letter, number, minimum of 8 or more characters, and cannot contain your username. If you have difficulty creating a new password, please contact your Diligent Boards administrator, or use our 24/7 Support service in your region.

- 6 Once the password information has been entered, tap **Save**. This new Diligent Boards password will be used when logging into Diligent Boards on any other device or platform.



Security – Security Questions

Diligent Boards for iPad has a feature to manage security questions on file. Security questions are used for identification purposes and are required in the event of a password reset.

- 1 Tap the **Section Menu** button in the upper-left corner to open the section menu.
- 2 Tap **Settings**.
- 3 Tap **Account Settings**.
- 4 Select **Security Questions** from the menu that appears. The window to manage your security questions will appear.

Note: *The number of questions required in the list is set by your company's security policy.*

- 5 Tap on the **Please Select A Question** field to open a list of available questions from which to choose.

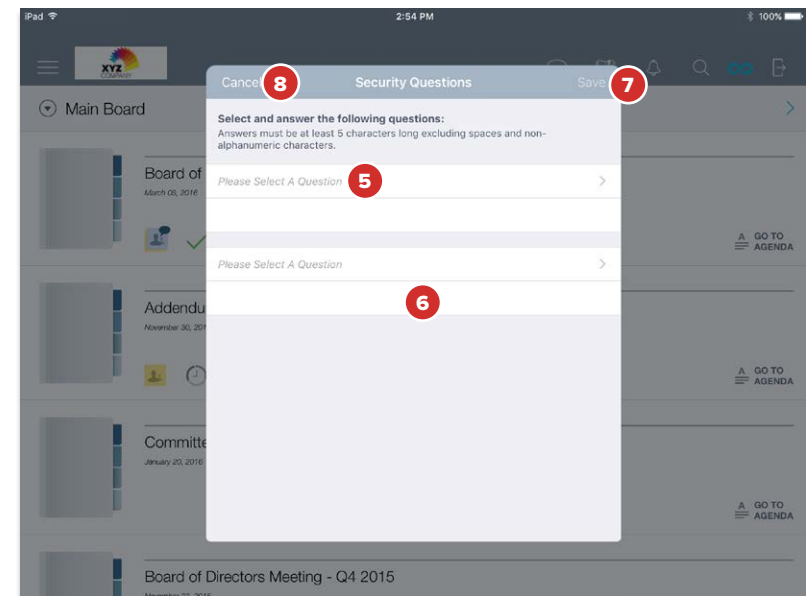
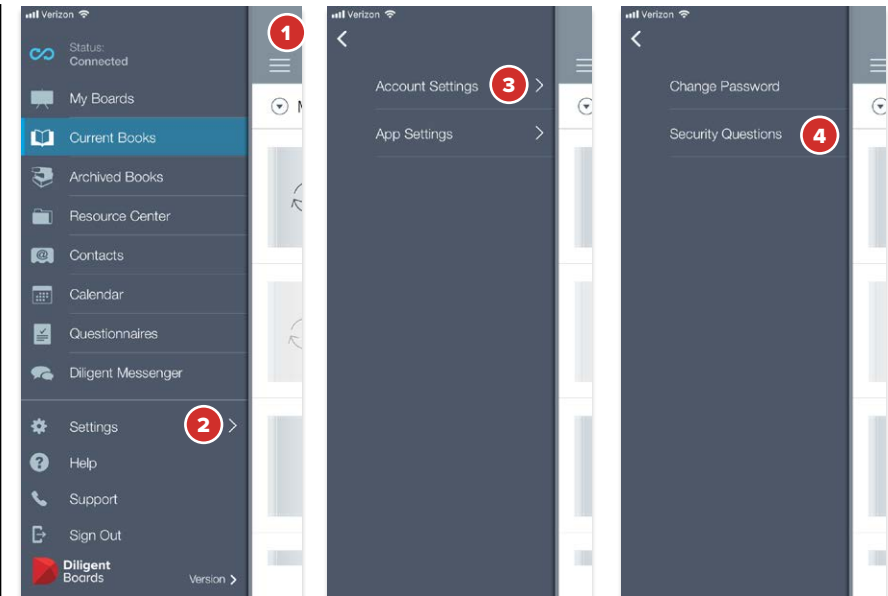
If you have answered any of the security questions in the past, those answers will appear. You can change your questions and answers at any time by tapping on the relevant field.

- 6 Once a question is selected, the answer can be typed in the field directly below it.

Note: *Answers must be at least 5 characters long excluding spaces and characters that are not letters or numbers.*

- 7 Tap **Save** to save your questions and answers.
- 8 Tap **Cancel** to discard your changes.

Note: *If your questions on file have not been recorded, the security questions dialogue window will appear every time you log in.*



Security – Log Off

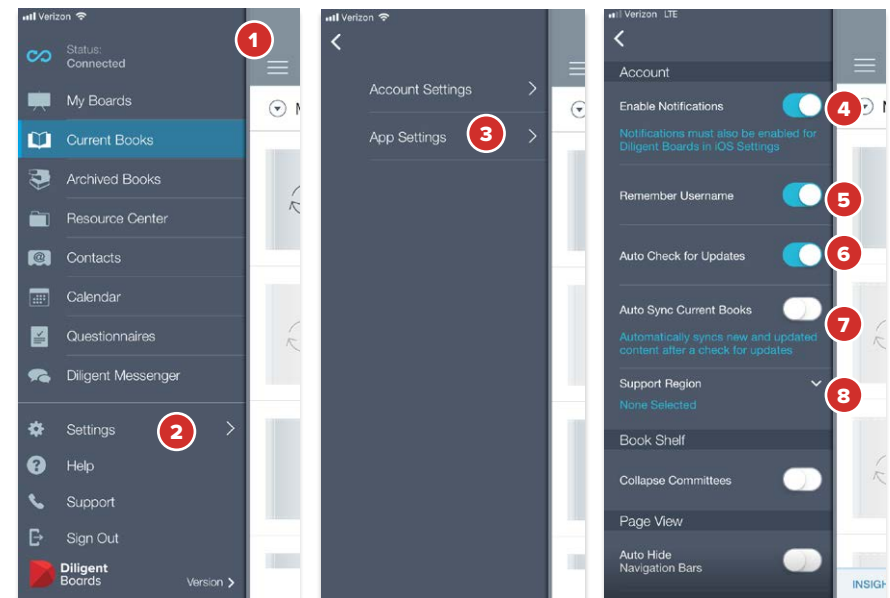
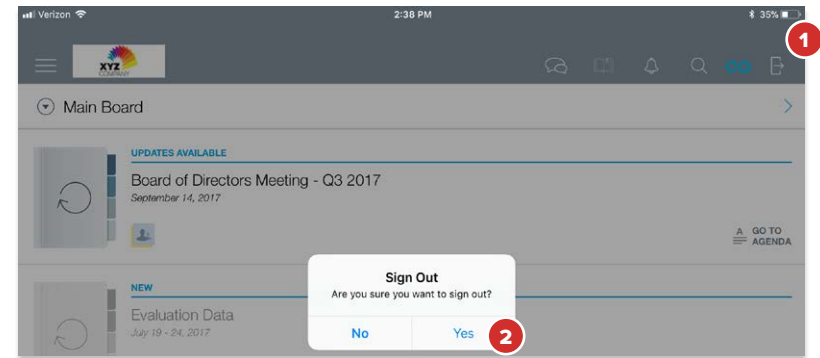
Logging off Diligent Boards any time it is not in use will help secure your board materials. After logging off, anyone using your iPad will need a password to access your Diligent Boards content.

- 1 Tap the **Log Off** icon in the upper-right corner of any main section.
- 2 You will be prompted to confirm ending your session. Tap **Yes** to return to the login screen. At this point, a password will be required to log back in.

Settings and Personalization – App Settings

These general settings can customize your user experience.

- 1 Tap the **Section Menu** button in the upper-left corner to open the section menu.
- 2 Tap **Settings**.
- 3 Tap **App Settings**.
- 4 **Enable Notifications** sends a push notification to your device any time an administrator chooses to announce new board material via that method. Push notifications must also be enabled for Diligent Boards on your device. See “Advanced Settings” for more information.
- 5 **Remember Username** stores the last username entered, so you’ll only have to enter your password (or Touch ID) to access Diligent Boards.
- 6 **Auto Check for Updates** is enabled by default and will automatically check for changes to your Diligent Boards content when you sign in and view sections. Disabling this feature will allow sections to load instantly without displaying a loading screen, but you will need to check manually for updates.
- 7 The **Auto Sync Current Books** setting automatically downloads any new content found when a “check for updates” is made. It is disabled by default.
- 8 **Support Region** specifies the 24/7 Support number that displays in various areas throughout the app.



Settings and Personalization – App Settings — Continued

9 Collapse Committees can reduce scrolling in the bookshelf view of Current and Archived Books. When enabled, the bookshelf will display just board and committee titles, with the list of books collapsed within each title.

Note: This setting should only be enabled if you have access to many committees that each contain many books and you want to reduce scrolling in your bookshelf list view.

10 Auto Hide Navigation Bars automatically hides the top and bottom navigation menus in the page view of a book or resource item. Turn this off if you would like to always see the menus and not have to tap the screen for them to appear.

11 Landscape Docking specifies whether the Navigation Panel will remain docked on the left side of the screen when the iPad is in landscape orientation. Turn this setting off to make the Panel appear as a hover menu.

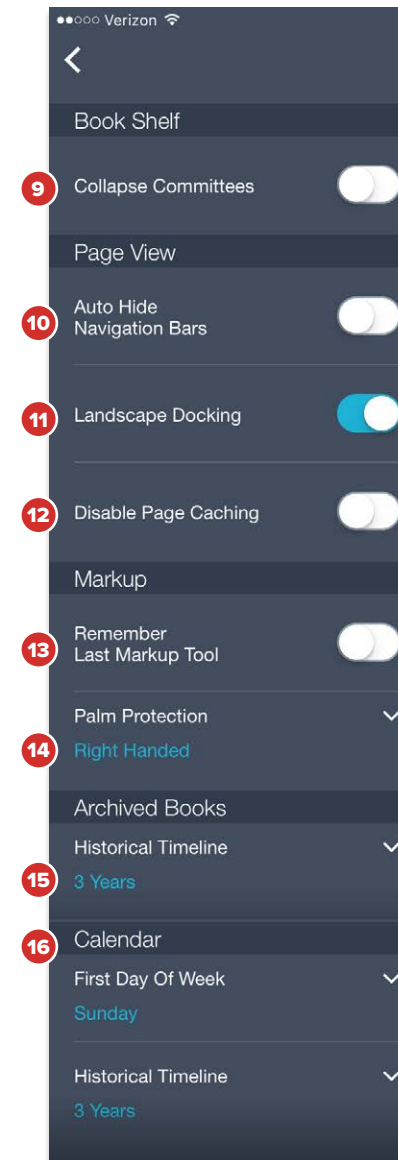
12 Disable Page Caching is an advanced setting that should only be modified if advised by your Customer Success Manager or Diligent Global Support.

13 Remember Last Markup Tool automatically turns on either the “pen” or “highlighter” feature based on which one was last in use. This is useful if you use markup tools frequently.

14 Palm Protection helps accommodate left- or right-handed markups by ignoring marks made by your palm on the screen. This setting is useful for stylus users.

15 Historical Timeline sets how many previous years will display in Archived Books. This setting is useful if your organization has a significant amount of archived material.

16 Calendar settings include the option to change the “First Day Of Week,” which alters the first column of the month view. “Historical Timeline” sets how far back the calendar items will sync.



Settings and Personalization— Advanced Settings

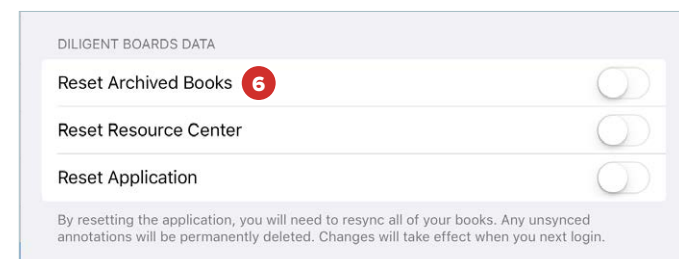
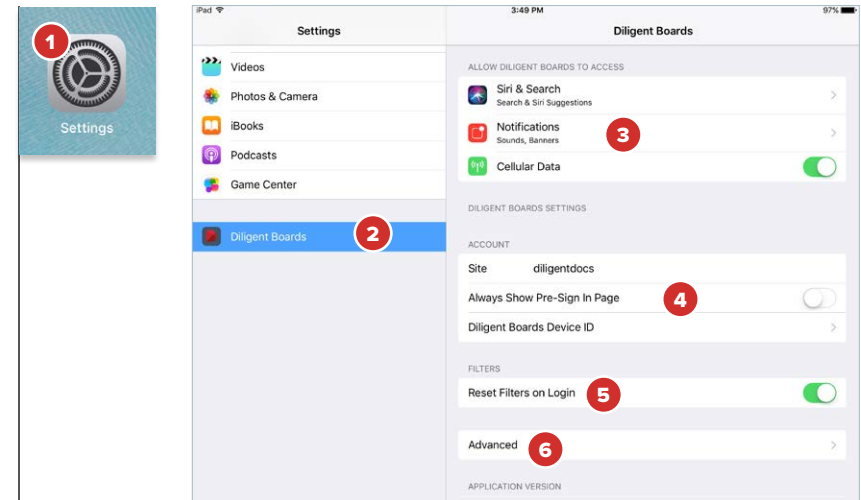
Diligent Boards also offers advanced settings that alter specific behaviors of the application.

- 1 Additional Diligent Boards settings are accessible from the iPad's Settings application. Tap the **Settings** icon on your home screen.
- 2 Scroll down the list of settings in the left column and tap on the **Diligent Boards** icon. The list of Diligent Boards settings will appear in the right pane.
- 3 **Notifications** contains controls to enable or disable push notifications of new and updated content from administrators (when push notifications are enabled for your site), and to customize how you receive them. To enable push notifications, tap Notifications, and ensure that the Allow Notifications switch is activated.

Note: Push notifications must also be enabled within the Diligent Boards app, via App Settings. See the "App Settings" section of this guide for more information.

- 3 **Always Show Pre-Sign In Page** pertains to users who have access to multiple boards using Diligent Boards, and have a separate user name for each Board. Enabling this setting allows you to enter your site name at the pre-sign in screen instead of modifying the application settings every time you sign in.
- 4 **Reset Filters on Login** refers to the Resource Center "Filter" feature, which filters the content displayed in that section based on the selected criteria. It is encouraged to leave this setting on so a full list of resource items is displayed by default.
- 5 **Diligent Boards Data** contains advanced settings that can be accessed from the **Advanced** option in the settings list. These options will reset the data in the application, and should only be used in the unlikely event that you are having difficulty syncing or viewing your Board materials in that section.

Note: When you reset the application or Resource Center, all existing notes will be removed. Offline items will also need to be re-synced.



Settings and Personalization – Language Settings

Diligent Boards for iPad supports multiple languages, translating itself automatically based on the international settings of the device.

- 1 On the iPad home screen, tap the **Settings** icon.
- 2 In the Settings menu that appears, tap the **General** icon.
- 3 Swipe down the General menu on the right of the screen until the **Language & Region** button is visible. Tap this button.

Note: If you have not updated your iPad software in some time, this button might be labeled “International” instead of “Language & Region.”

- 4 Tap the **iPad Language** button.

Note: If you have not updated your iPad software in some time, this button might just be labeled “Language.”

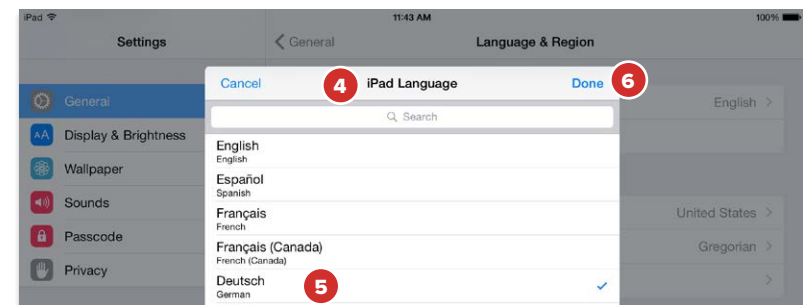
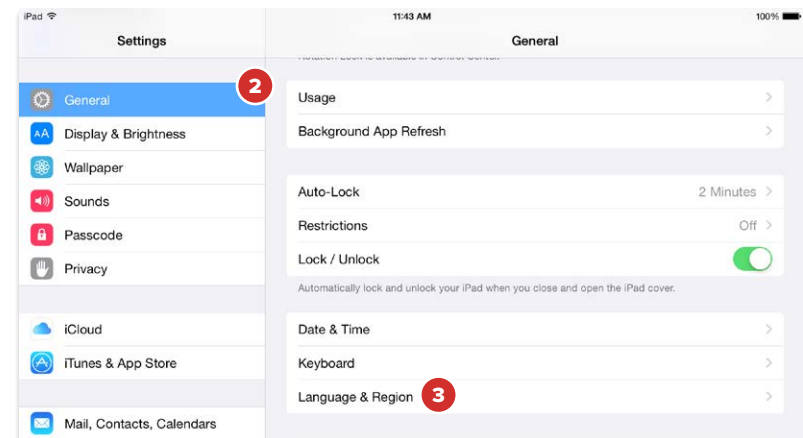
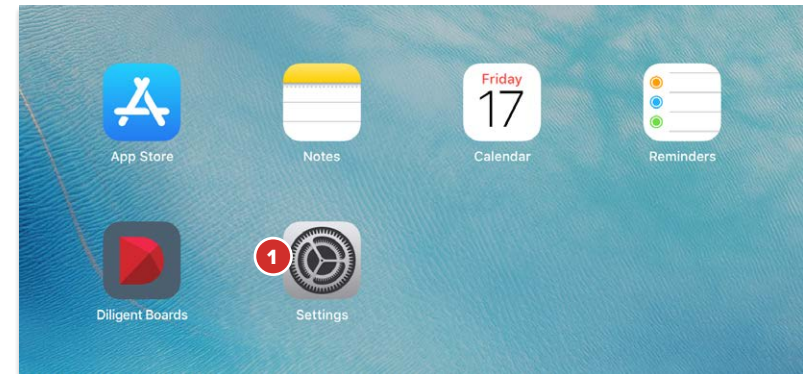
- 5 A list of languages supported by your device will be displayed. Select any of the following supported languages:

- English
- Deutsch — German
- Français — French
- Español — Spanish
- Español (Mexico)— Spanish
- Italiano — Italian
- Português (Brasil) — Portuguese
- Português (Portugal) — Portuguese
- English (U.K.) — English
- English (Australia) — English
- Chinese, Simplified— Simplified Chinese
- Nederlands — Dutch

Note: If a language not supported by Diligent Boards is selected, the App will remain in the last chosen supported language in iOS 7 and above.

- 6 After selecting a language, tap **Done**. The entire iPad, including Diligent Boards, will convert to the selected language. This process may take several moments to complete.

Note: Changing the language setting of your iPad will log you out of any active Diligent Boards sessions. Changing the language setting of the iPad will not change the way dates and times are presented. To change this formatting, select “Region Format” instead of “Language” on the International settings menu.

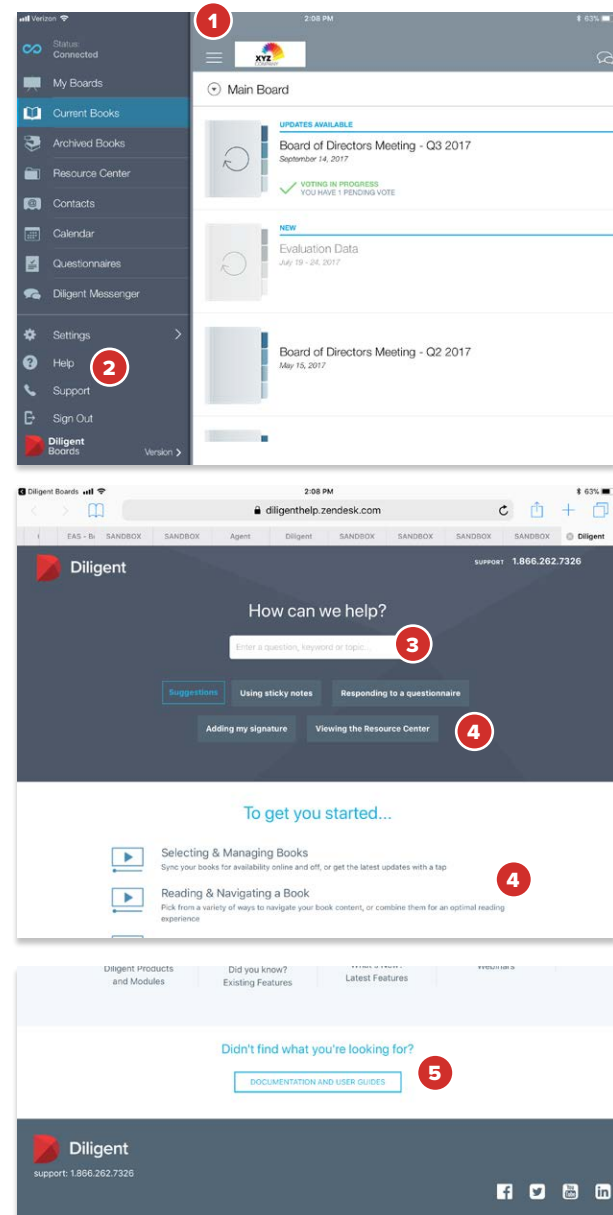


Online Help

The online Customer Help Center gives you direct access to product guides, informational videos and articles, and other material that can answer any questions you have about Diligent Boards. The Help Center is a supplement to Diligent Global Support, which remains on call to assist you 24/7/365.

- 1 Tap the **Section Menu** button in the upper-left corner to open the section menu.
- 2 Tap **Help**. The Help Center will open in Safari.
- 3 Use the **search box** to find information on specific topics or keywords.
- 4 Tap a common **help topic** to jump right to information about it.
- 5 Scroll down to access Diligent Boards **documentation and user guides**.

Note: The Customer Help Center is only available by tapping Help from the Boards app. The link cannot be accessed by bookmarking or manual URL entry.



Forgot Password?

Passwords can be reset using the Diligent Boards self-service password reset feature.

Note: For password reset to work effectively, you will need to have a valid email on file and have answered all of your Security Questions.

- 1 Tap **Forgot?** on the login screen of Diligent Boards.
- 2 The iPad's Web browser will open the password reset page. On this page, you can take the following steps to reset your password:

2a: Enter your **User Name** and tap **Next**. If the user name was entered successfully, a unique alphanumeric security code will be sent to the email address you have on file in Diligent Boards.

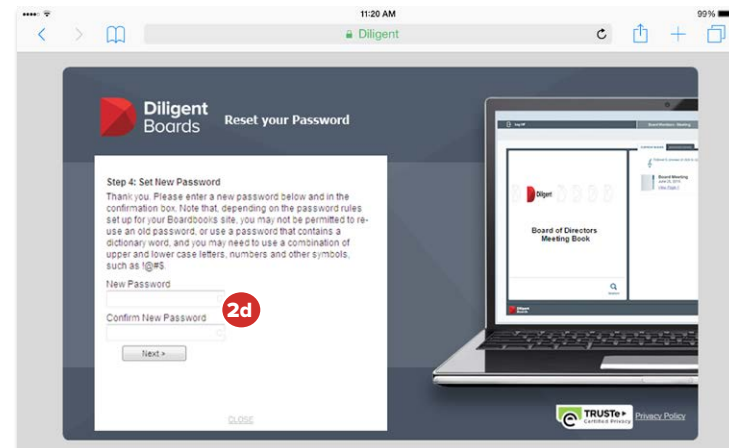
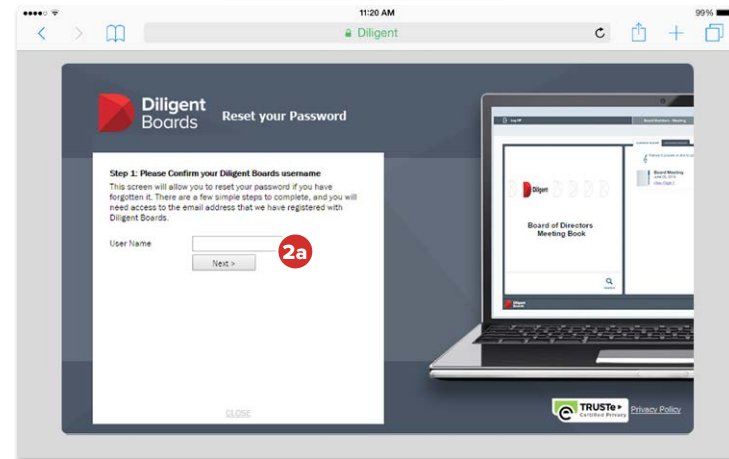
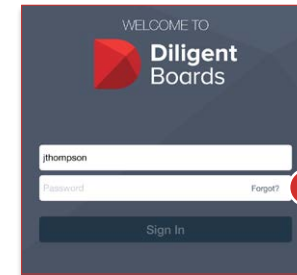
2b: You will need to enter the alphanumeric security code that was sent to your email. If you check your email on the iPad, you can close out of the Web browser and not lose your progress in the password reset when you return. Enter the code from the email in the field provided and tap **Next**.

Note: If you do not receive an email from Diligent Boards after completing step 2a, check your spam folder. You can repeat step 2a as needed to receive a new unique security code.

2c: After the alphanumeric code is entered successfully, you will be prompted to answer one or more of your security questions. Respond to all of the questions and tap **Next**.

Note: Your security question responses are not case sensitive, but otherwise must be typed exactly as they were when created. This includes any hyphens or spaces between words.

2d: The final screen will prompt you to enter and confirm a new password. After successfully creating the new password, you can return to Diligent Boards for iPad and use the new password to log in.



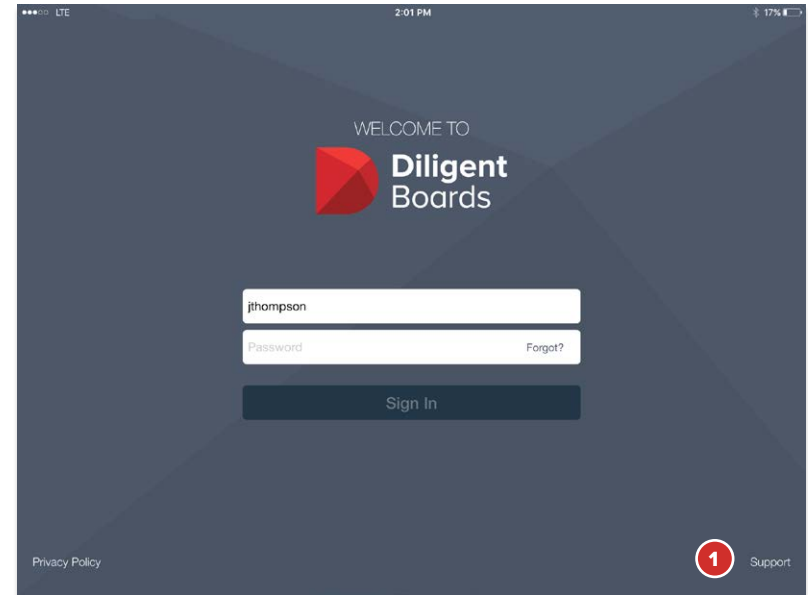
Support Numbers by Region

Users have the ability to set the regional support number that will display on the login screen.

- 1 To view a list of Global Support Numbers by region, tap the link labeled **Support**. A window will appear with a list of the support numbers for each region.

Note: Changing the language setting of your iPad will log you out of any active Diligent Boards sessions.

Note: Depending on the settings of your iPad, changing the language may not change the way dates and times are presented. To change this formatting directly, select "Region Format" instead of "Language" on the International settings menu.



Appendix A: Functionality in Split Screen View

There are many different Split View configurations, depending on your device model, screen orientation and Split View layout. In landscape orientation, the app will either be in a 70%, 50% or 30% view, depending on the location of the divider bar and the side of the screen on which the app is open. There is only one possible divider bar location in portrait orientation.

In some configurations, Diligent Boards for iPad will switch to **Compact View**, with more limited functionality and a slightly different layout. These changes include:

- Only Current Books are available.
- The markup toolbar is located on the right side of the screen and is not movable.
- Sign out from page view is not available (but is still available from the Section Menu).
- The Search and Resume Reading functions are not available.

Diligent Boards for iPad will display in the Compact View in the following scenarios:

Portrait mode

- All Split View configurations on all devices

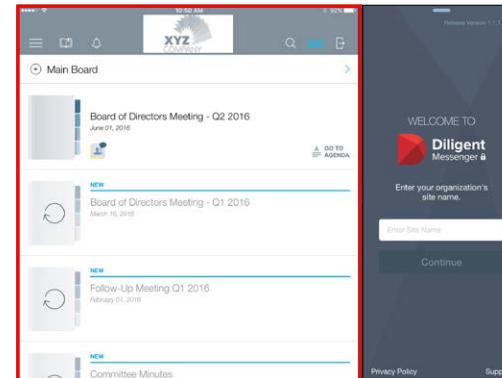
Landscape mode

iPad Air 2 (and similar)

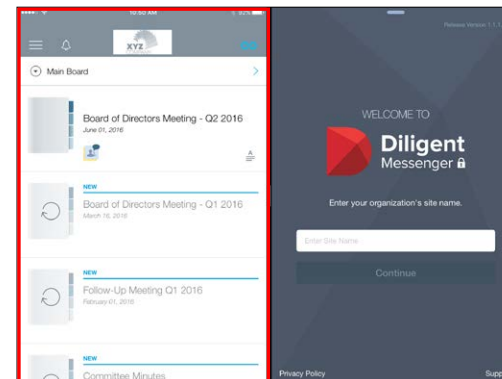
- 50% and 30% view

iPad Pro

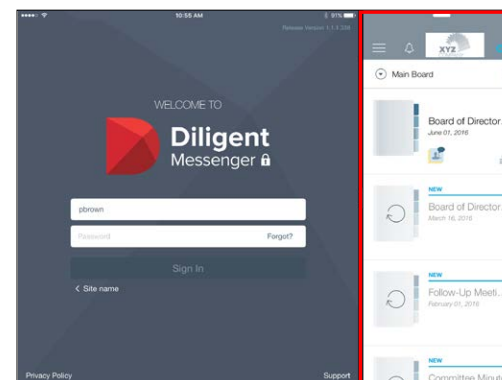
- 30% view



70% view



50% view
(either side)



30% view

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If you encounter difficulty or have additional questions, please contact Diligent Global 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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