Diligent Boards for Windows

Reference Guide v2.5

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Installing the Application

Installing Diligent Boards from the Windows App Store requires a Microsoft account. If your Windows device was issued by your organization and you are not authorized to install applications on it, please contact your site administrator for assistance.

1 To access the Windows App Store in Windows 8.1, swipe up from the center of the **Start** screen to reveal a list of apps installed on your device. In Windows 10, tap the Start button ⊞ at the lower left side of the screen. Then, in either version of Windows, tap the **Store** icon that appears.

Note: If you don't know what version of Windows you have, __click here__ to find out.

2 In the search field, enter the keyword **Diligent Boards.**

3 A list of results will automatically appear. Tap **Diligent Boards** when it appears in this list.

4 Tap the **Free** button. If you've installed Diligent Boards in the past, this button may also be labeled **Install**.

5 If you have signed into Windows with your Microsoft account, the store may prompt you for a password, and then install the application. Otherwise, it will ask you to sign in with or create a new account.
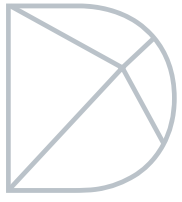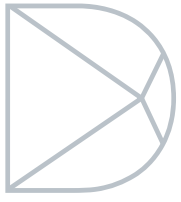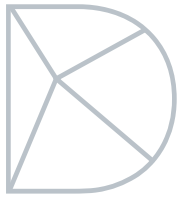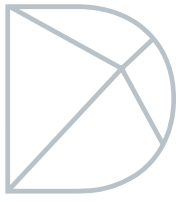
6 If you do not have a Microsoft account, in Windows 8.1, tap **Sign up for a Microsoft account.** In Windows 10, tap **Create one!** Then, in either version of Windows, follow the prompts.

Tip: If you have an existing Microsoft account, but do not remember the password, please click here for __Microsoft's self-service password reset website__.

Once your Microsoft account is successfully created, the application will download and an icon will appear on your Apps screen.

Note: If you created a new Microsoft account and the application did not download automatically, repeat steps 1–5, and sign in with your new Microsoft account.
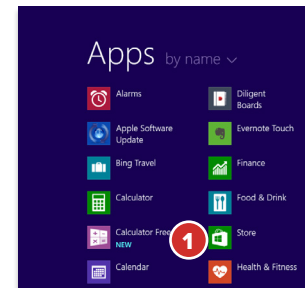
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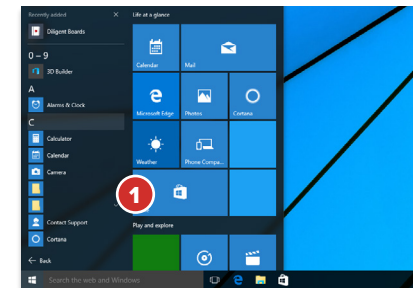
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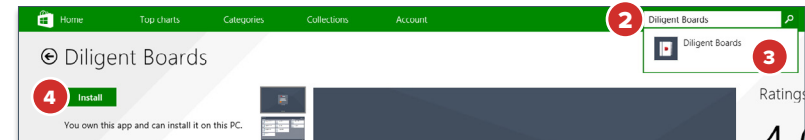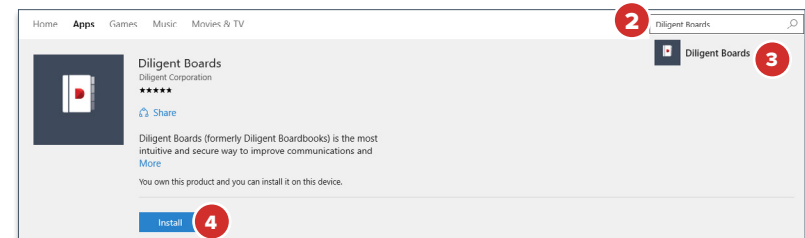
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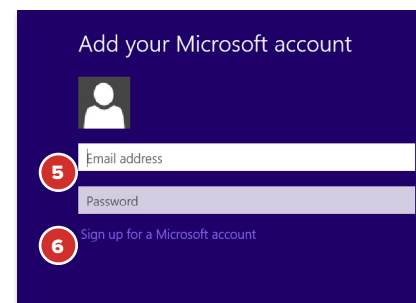
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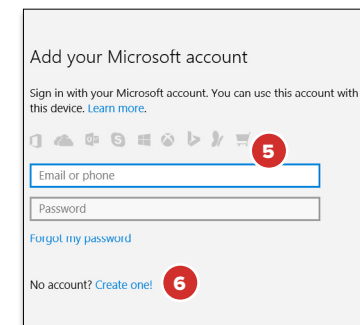
Windows 8.1

Windows 10

Welcome, Let's Get Started!

This guide will lead you through the navigation and features of the application. If you need immediate technical assistance at any point, please find our 24/7 Support numbers listed by region at the end of this manual.

1   In Windows 8.1, swipe up from the center of the screen to reveal your list of apps. In Windows 10, tap the Start button and select the **All apps** button that appears directly above it. If installation was successful, the **Diligent Boards** icon will be on the list; you may have to swipe down the list to see more of it. Select the icon.

*Tip: To customize the apps that appear automatically in the "Start" screen, you can reference **Microsoft's Start Screen Tutorial.***

2   The first time you launch the application, you will need to enter the site name for your company. Tap on the site name field and enter the following address:

3   Tap **Continue** to proceed to the log-in screen.

4   Enter the username and the case-sensitive password you have been provided.

5   Tap **Sign In.**

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

6   If logging in for the first time, you may be prompted with a **Security Questions** Alert window.

Note: Security questions are used for identification purposes and may be required in the event of a password reset. This dialogue window will appear upon log-in until all questions on file have been recorded.

7   Tap on the **Please Select a Question** field to display a list of available questions from which to choose.

8   Once a question is selected, type the relevant answer in the field below it.

9   Press the **Save** button to save your questions and responses. If you press **Cancel,** your responses will not be saved.
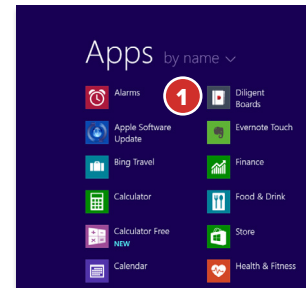
Windows 8.1

Windows 10
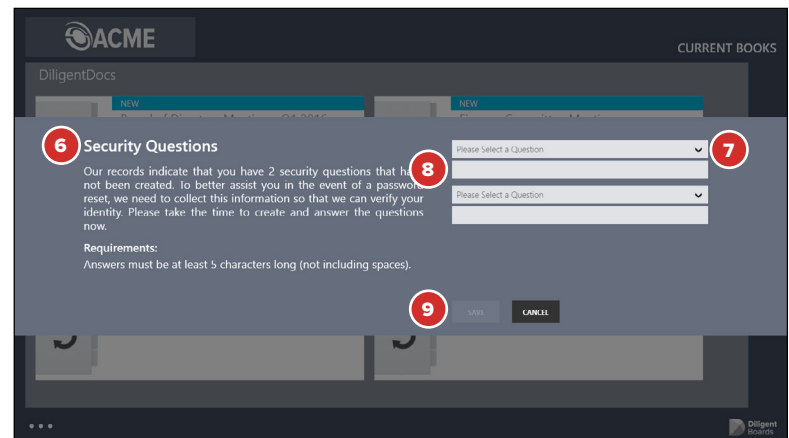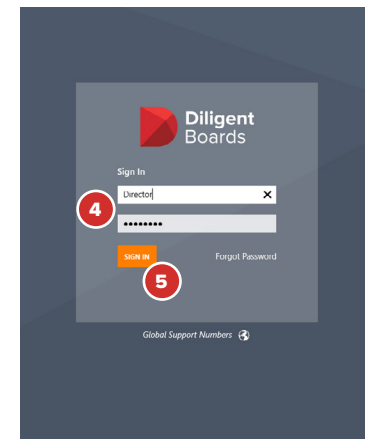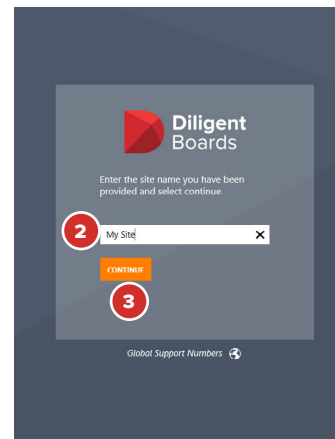
Alerts

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

1 When you sign in to your board site, an **Alerts** sidebar may appear. This window will contain a message from your board administrator.

2 Use the **OK** button to dismiss the message. The message will appear the next time you sign in.

3 If you don't want the message to appear the next time you sign in, use the **Don't Show Again** button.

4 If you've dismissed the message and would like to see it again, select the Ellipses button in the lower-left corner of the screen. Select the **Bell** icon to make it appear again.

5 In the bottom app bar that appears, select the **Alerts** button to reveal the alert.
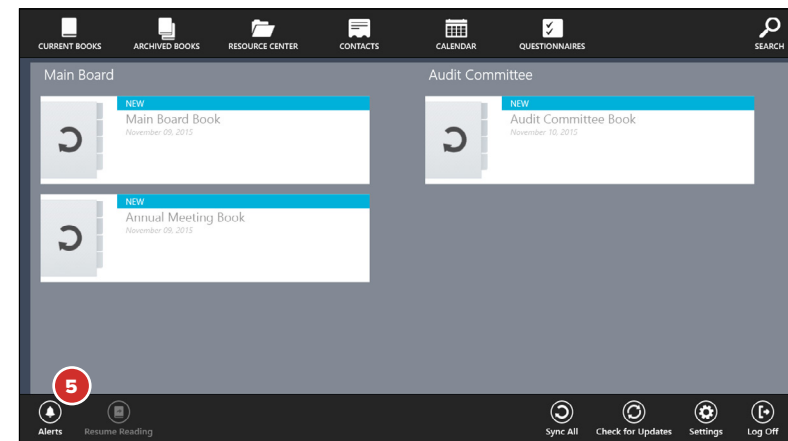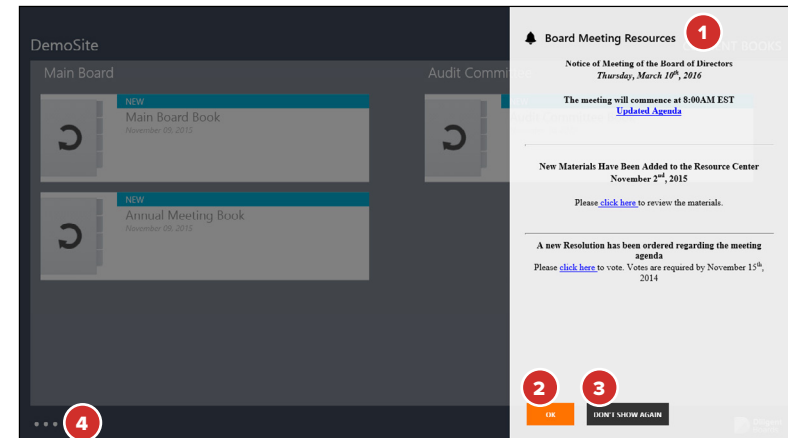
Download and Manage Current Books

Diligent Boards for Windows will allow you to manage and sync your Board materials for each board.

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

Note: If you do not sit on multiple boards, upon log-in, you will be taken directly to the Current Books Hub, which lists your books for all available meeting groups.

2 Before you can view content in a book, you must first download, or sync, the book's contents to your device. Tap the **Sync** icon to download the book. You can start reading a book while it syncs in the background.

Note: Sync times will vary based on the speed of your Internet connection and the amount of content contained in the book. Since there is limited bandwidth and connectivity with cellular networks, it is strongly recommended to use a Wi-Fi connection whenever possible to reduce your sync times.

3 Diligent Boards for Windows will automatically check for updated versions of your books each time you log in. The book tile for New or Updated Books will be labeled accordingly:
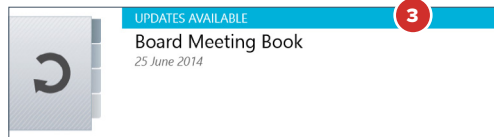
4 Tap the Ellipses button in the lower-left corner of the screen to reveal the top and bottom app bars. These app bars contain a variety of navigation and sync options.

5 From the bottom app bar, you can **Sync All** updates or **Check for Updates.**

6 If you sit on multiple boards, you can return to the Board Selector screen by tapping the **My Boards** button.

7 Tap on a committee or meeting group name to display only books relevant to that group. A back arrow icon will appear in the upper-left corner to return to the complete book list.

Note: Pinch anywhere in the middle of the screen to display a list of all available meeting groups. Tap a meeting group name to view the relevant books for that section.
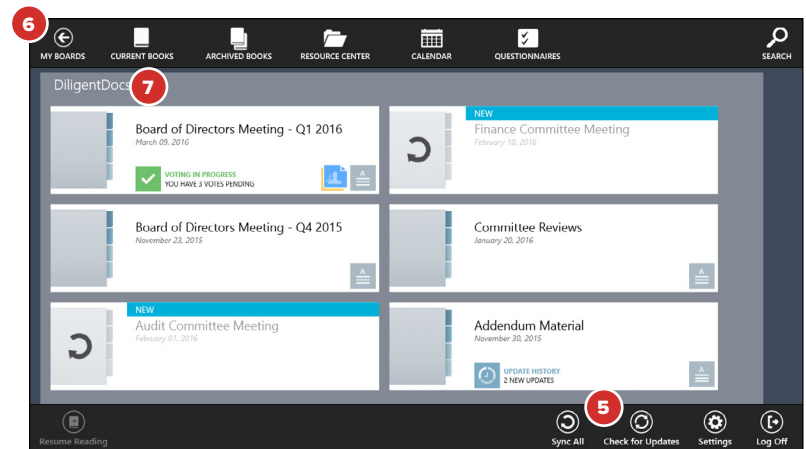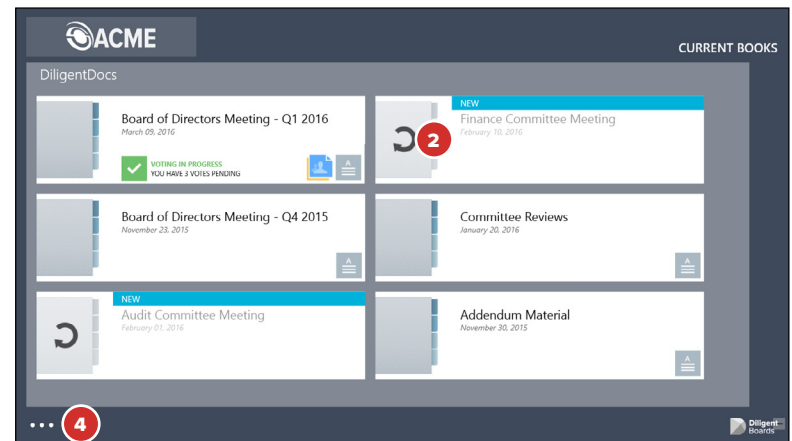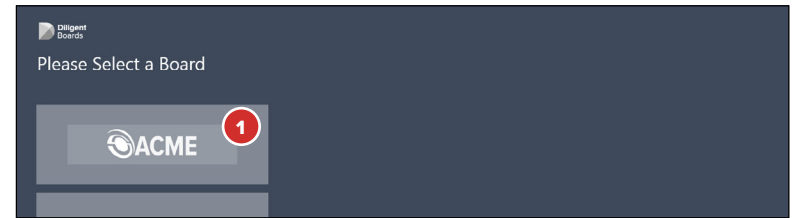
Opening a Book

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 agenda icon, the book does not contain an agenda tab.

3 To pick up where you were last reading, tap the Ellipses button in the lower-left corner of the screen and tap the **Resume Reading** icon in the bottom app bar.

4 Tap the **Update History** icon to see a list of recent important changes to a book. Tap any item on the list to go directly to the updated content.

5 Books that contain annotations will display an annotation icon in the book tile. Tap this icon to see a list of all the annotations in the book. Tap any item in this list to go directly to the section that contains that annotation.
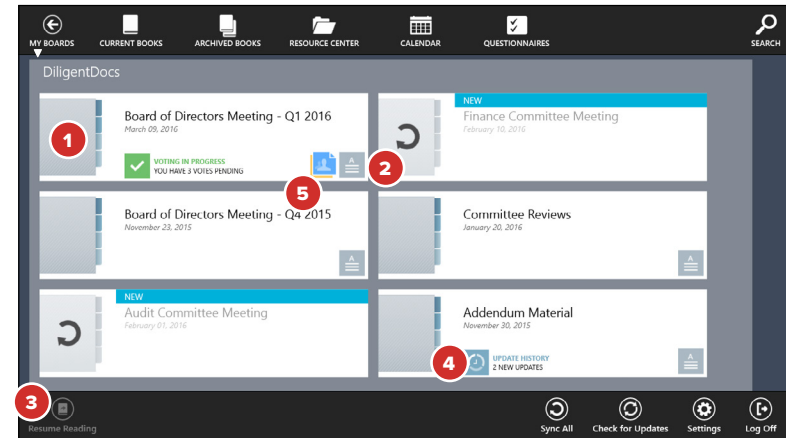
Resetting a Book

Individual books or entire books for a meeting group can be removed from being stored offline and reset. Annotations for an individual book or an entire meeting group can be permanently deleted.

1 To remove an individual book from offline storage or delete its annotations, press and hold anywhere on the book tile for several seconds.

  1a To remove all books from offline storage or delete all annotations from the meeting group level, press and hold anywhere on the meeting group name for several seconds.

2 A menu will appear above or below the relevant book tile or meeting group name with an option to **Reset Book(s)** or **Delete All Annotations.** Tapping either option will prompt an alert to confirm your choice.

Note: *If there are no associated annotations, you will only see the "Reset Book(s)" option. Resetting one or more books may permanently delete any associated unsynced page markups and may also delete your notes, depending on your site configuration.*
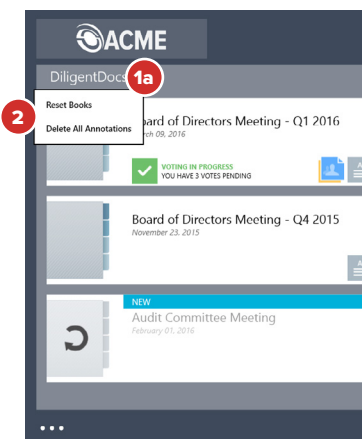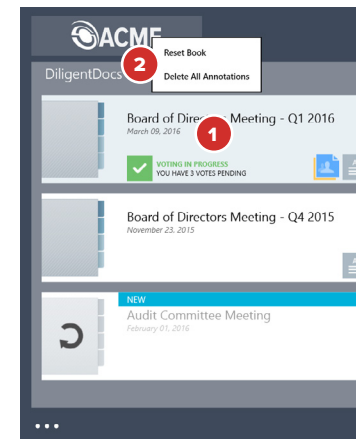
Update History

Update History presents a list of important changes that have been made to a book since the last time it was synced, allowing you to review them easily.

1 After downloading a newly updated book, an **Update History** icon will appear. Tap this icon to reveal the list of book updates.

2 The Update History list will display the book changes your administrator has chosen to highlight, as well as any comments pertaining to the change.

3 Tap any item in the list to go directly to the updated section of the book.
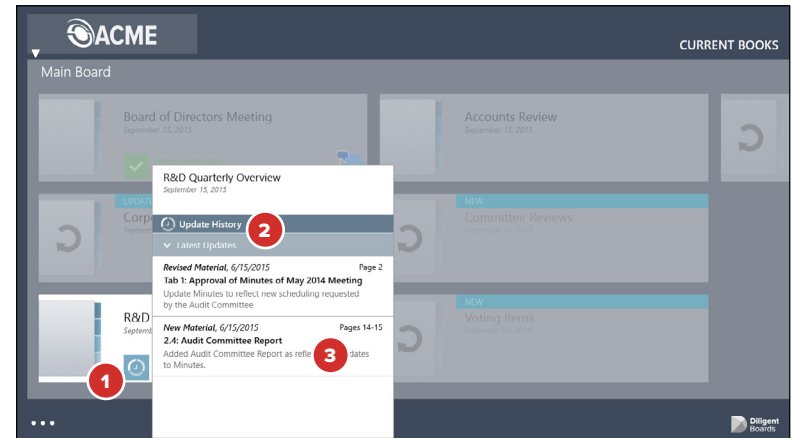
Annotations List

The annotations list presents all of your personal and shared book annotations, and allows you to go directly to their location in the book.

1 If a book contains public annotations or annotations that you have created, an **annotations** icon will appear. Tap this icon to reveal the annotations list. Annotations include notes, pen marks, highlighter marks and bookmarks.

2 The annotations list will display your public and private notes, public notes belonging to others, and any pen markups and highlights that you have made.

3 Tap any item in the list to go directly to the section of the book where that annotation appears. You will be brought to the first annotated page of the section or tab where your chosen annotation appears.
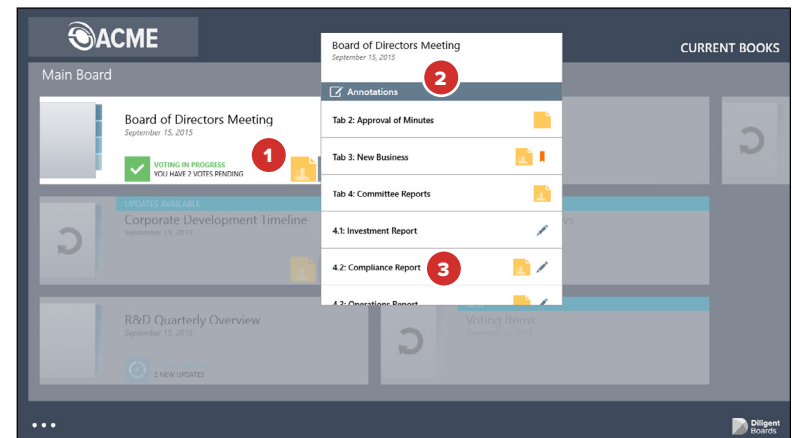
Archived Books

Books from prior meetings can be viewed in the Archived section. Archived Books are not synchronized to the Windows device and will require a Wi-Fi or cellular network to be viewed.

1 To access archived books, swipe down anywhere from the top border of the screen or tap the Ellipses button in the lower-left corner of the screen. Select the **Archived Books** icon in the top app bar that appears.

Tip: The first time you access the Archived Books section, it will check for updates and list the latest set of books from your previous meeting(s).

2 To manually check for updates to Archived Books, swipe up anywhere from the bottom border of the screen or tap the Ellipses button in the lower-left corner of the screen, and select the **Check for Updates** icon in the bottom app bar.

Note: The application will automatically check for recent updates or changes the first time you navigate to the Archived Books section after log-in.

3 The filter bar above the book tiles reflects the criteria determining the range of books displayed.

4 If annotations were made on a book before it was archived, the **Annotations** icon will appear. This indicates that previously made annotations can be viewed. Annotations cannot be added to or updated once a book is archived.

Note: Books can be archived with or without annotations at the discretion of your site's administrator.

5 To change the range of archived books displayed, select from any of the drop-down menus in the filter bar, which include the following criteria:

5a **Committee Filter,** including an option for "All Committees."

5b **Year Filter,** including an option for "All Years."

5c **Date Range Filter,** allowing "All Months" or any range of months to be selected.

6 To open an archived book to its first page, tap anywhere on the relevant book tile.
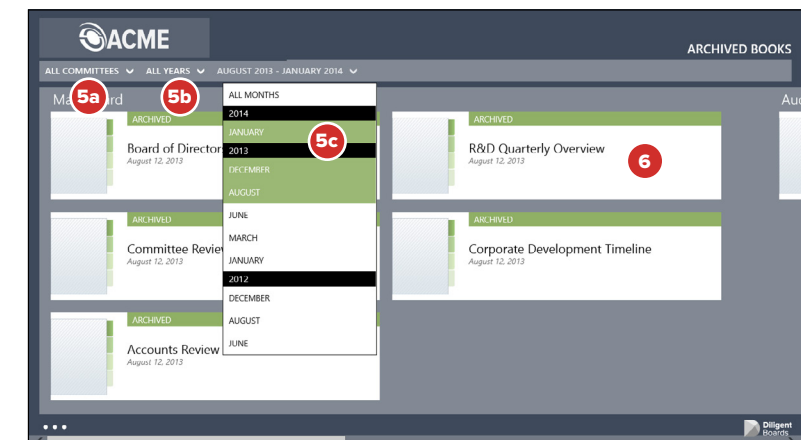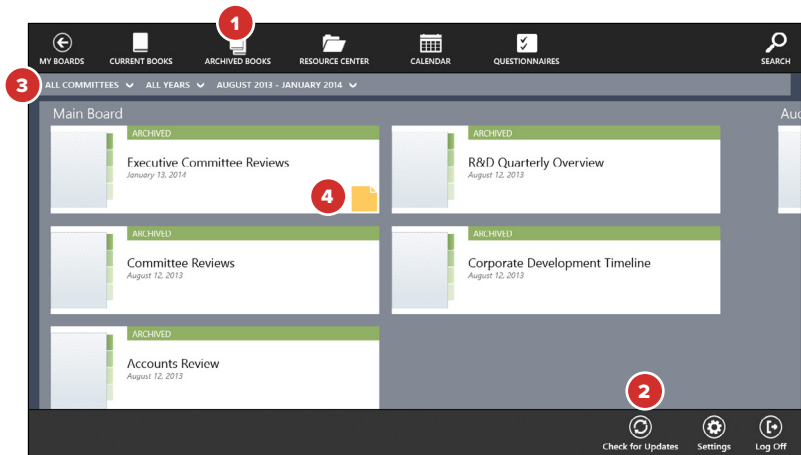
Resource Center

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

1 To access the Resource Center, select **Resource Center** from the top app bar.

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

2 To manually check for updates in the Resource Center, select the **Check for Updates** icon in the bottom app bar.

3 The Resource Center may contain a collection of offline and online-only items. **Online-Only** items require an Internet connection to access them. **Offline** items can be synced to the device for access at any time.
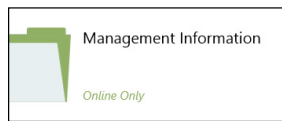
An online-only folder   *An offline folder*
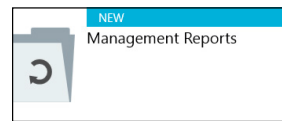
4 Folders that contain new or updated items will have a **Colored Corner**.
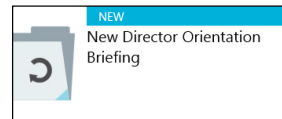
5 To sync every offline document in an offline folder, tap the **Sync** arrow on the folder tile. This will let you access those documents while offline.
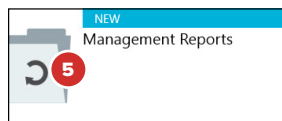
An unsynced offline folder   *A synced offline folder*
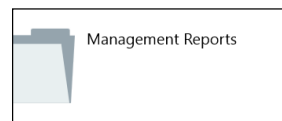
Note: Offline folders may contain online-only documents. These will require an Internet connection to view, even if the rest of the folder is synced.

6 Tap any folder tile to view the folder's contents. You can look inside offline folders even if you haven't synced them.
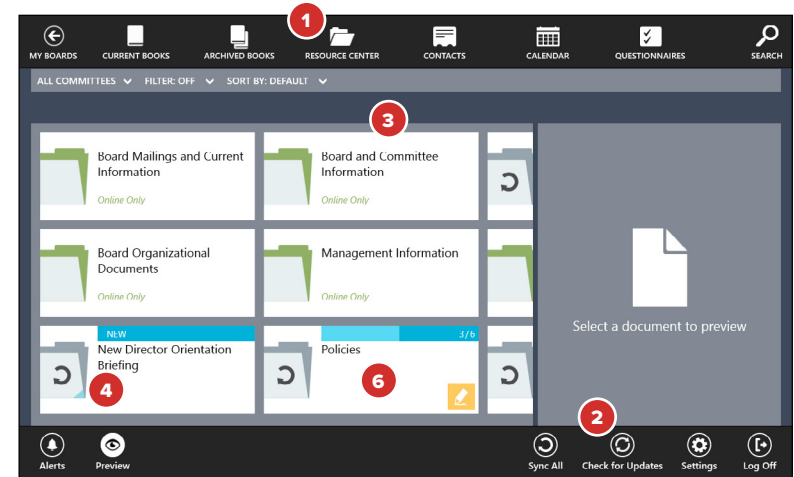
Resource Center — Continued

7   To go back to the last folder you were in, tap the **Back** button.

8   To see a list of all of the parent folders of the folder you are in, tap the **Name of the Current Folder**. Select any folder from the list that appears to return to that folder.

9   New or updated documents will have a **Colored Corner**.

10   To view an individual, unsynced offline document, you must sync it. Tap the **Sync arrow** on the document icon.

11   You can sync all offline documents in the folder you have open by tapping **Sync All** in the bottom app bar. Offline documents in sub folders will also be synced.

Note: If you exit all Resource Center folders and tap "Sync All," you will sync every offline document in the Resource Center.

12   Tap any document to preview it. Tap on the edges of the preview to move between the pages of the document.

Note: Unsynced and online-only items can only be previewed with an Internet connection.

13   Tap **Document Properties** to see more information about the document, including its length, the date it was added and its location in the Resource Center.

14   If you would rather see more folders and documents at once, the preview window can be disabled. In the bottom app bar, tap **Preview** to turn it off.

15   Tap the preview page to open the document. You may be asked to sync. If you've disabled Preview, you can open the document simply by tapping its icon.

16   Navigating a Resource Center document is like navigating a book. See the Book Navigation Features section for more information.

17   To export annotated pages to a PDF, tap **Export**. See the section on Exporting Annotations for more information.

18   Tap **Print** to print the document in whole or in part, or to print all documents in the folder. See the section on Printing for more information.

Note: Online-only documents cannot be printed or exported.
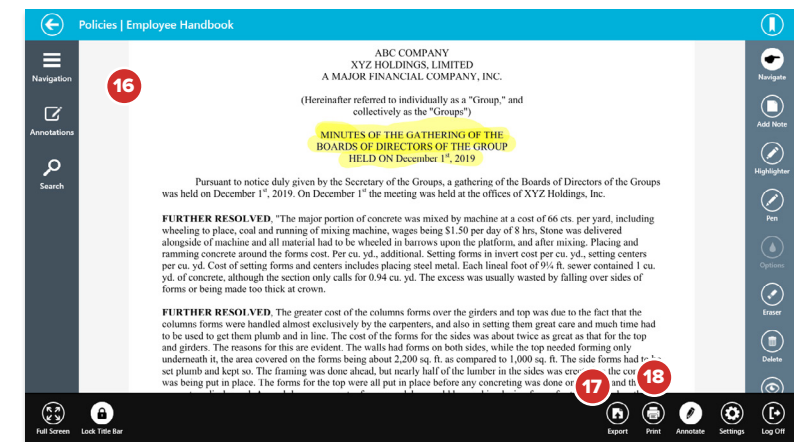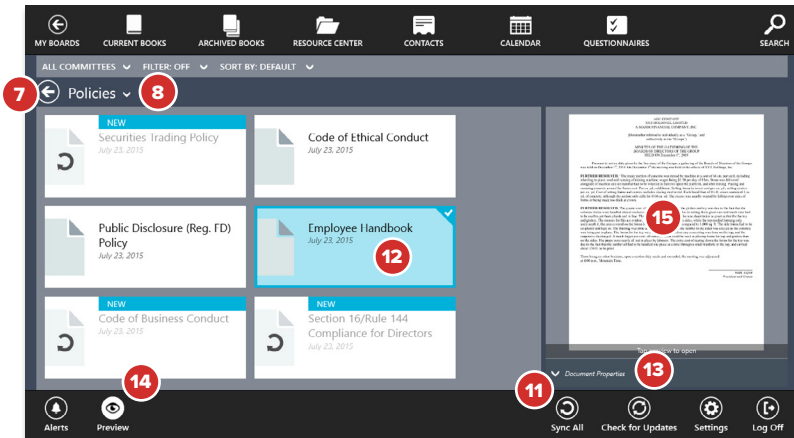
Resource Center — Continued

19 Offline Resource Center documents have full annotation functionality. See the Book Annotations and Notes section for more information.

Note: Online-only documents cannot be annotated.

20 When you're done using a Resource Center document, tap the **Back** button.

21 To remove a Resource Center document from your device, tap and hold until the Delete menu appears, and select **Reset item**. You can also tap and hold on a folder to remove all items in that folder from your device. You'll be able to get any of these documents back later by syncing.

Note: If you tap and hold offline documents or folders, you'll also be given the option to remove all annotations from those items.

Resource Center Filters

Resource Center filters can hide any documents and folders based on select criteria, making it easier to find items in large or complex Resource Centers.

1 While in the Resource Center, tap **Filter**.

2 In the filter menu that appears, you can filter by:

2a: Type - Whether the items are available online or offline only

2b: Date Added - How recently the item was added to the Resource Center

2c: Category - The category the item is in

Note: You can use any of these filters simultaneously. If your Resource Center does not use categories, the "Category" filter will not be available.

3 Tap the **All Committees** filter to show only Resource Center items from a specific group or committee.

4 By default, Resource Center items will be sorted by the order that was chosen by your Diligent Boards administrator. Tap the **Sort By** option to sort alphabetically instead.
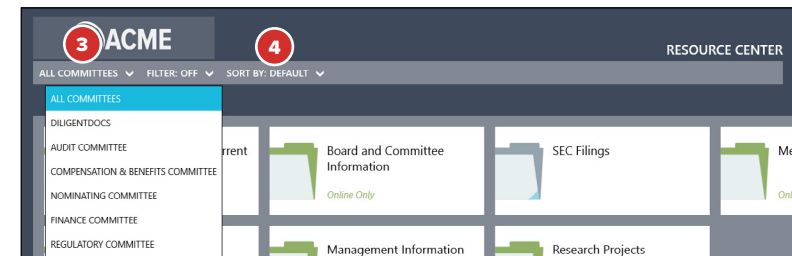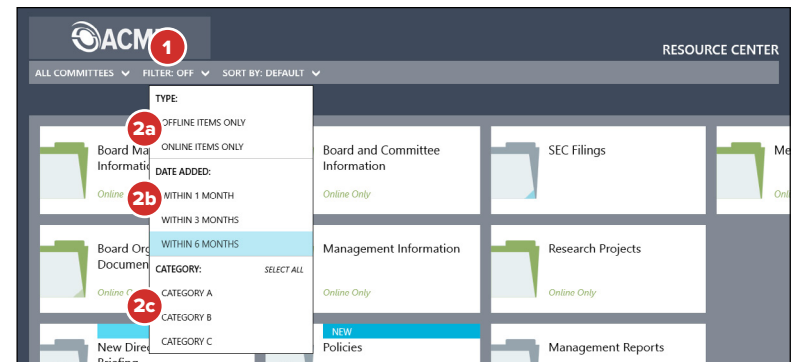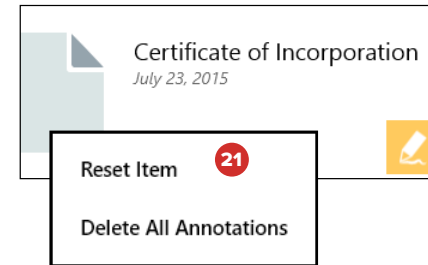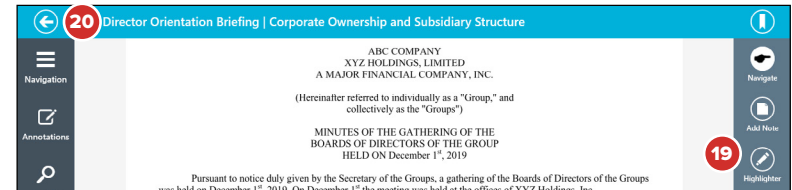
Site Search

The Search screen makes it easy to find a word or term in almost any section of the site.

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

1 Before opening a book, tap the **Ellipses** button in the lower-left corner of the screen or swipe down anywhere from the top border of the screen.

2 Select the **Search** icon in the top app bar that appears.

Note: You can also search within a book that you are currently reading. See "Book Navigation Features - Search" for more information.

3 Tap or click the **Current Books, Archived Books** or **Resource Center** buttons to select the sections to search. You can search multiple sections at once.

4 Tap or click the **arrow above 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.
- **Search Exact Phrase** shows only documents where the exact phrase being searched for appears.

5 Select the **Search** field and type in the terms you would like to look for. Tap or click the orange **Search** button; the search itself may take several moments.

6 **Search results** will appear in a list of tiles. Swipe left and right on this list to explore the results. Tap or click a result to display a preview of the document on the right of the display.

7 Select the **Filter** options to filter the search results by committee, or to sort results by meeting date.

8 Search terms will appear highlighted on the **Page Preview.** Select this preview to go to that page in the Page View; your search terms will remain highlighted. Swipe the preview to the right or left to go to the previous or next 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."
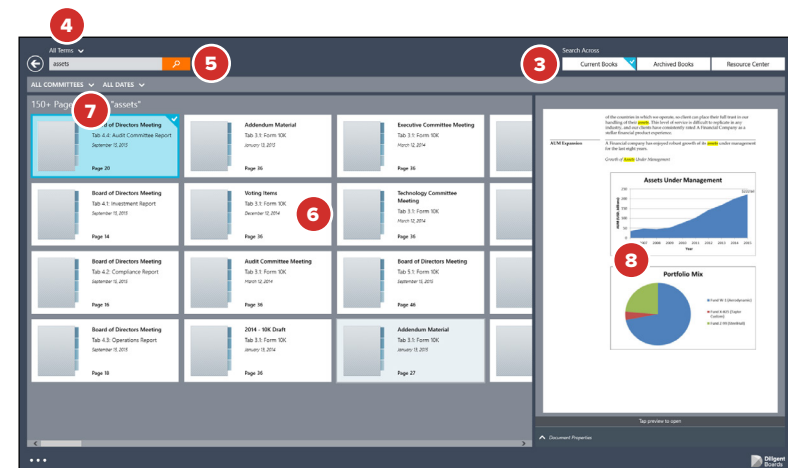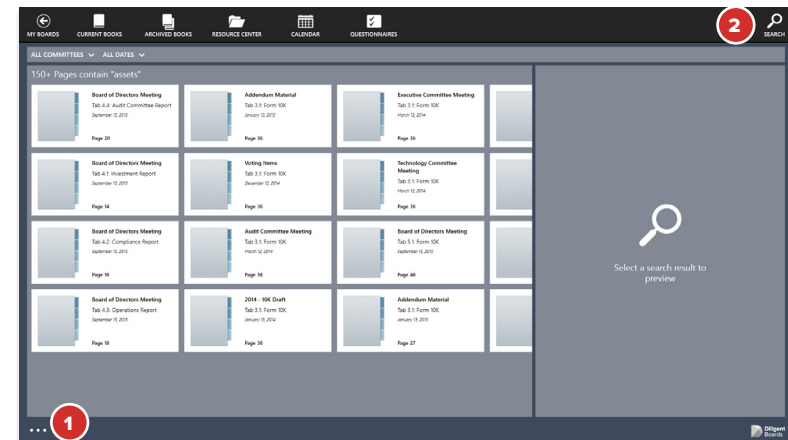
Book Navigation— Viewing Book Contents

The Page View offers multiple ways to navigate and view the content of a book.

1 Tap the **Ellipses** button in the lower-left corner of the screen, or swipe down anywhere from the top border of the screen, to view the top and bottom app bars.

  1a The top app bar displays the book and tab titles.

  1b Tapping the **Back Arrow** icon in the top app bar will return to the Current Books Hub.

  1c To keep the top app bar visible while navigating the book, tap the **Lock Title Bar** icon in the bottom app bar.

  1d Tap the **Full Screen** icon to hide all of the buttons and bars, making only the page visible. To exit Full Screen mode, swipe up from the bottom of the screen or right-click with the mouse, and tap the icon again.

2 Tap the **Navigation** icon to view an outline of the book's tab sections.

3 Tap the **Annotations** icon to view an outline of the book's annotations.

4 Tap on a blue link to be taken to a referenced section of the book, an external website or another application.

5 After you've tapped a link, the Back Arrow button will become the **Link History** button. Tap this button to go back to the page that contained the link, or tap and hold the button to see a list of all the page links you've tapped while reading the book.

Note: Only links within Diligent Boards will be recorded in Link History.

6 Tap the left or right sides of the document to turn pages or swipe left and right to turn pages.

7 To view the book agenda, tap on the **Agenda** icon. Tap this button again to return to the page you were reading.

8 Press and slide your finger on the **Page Slider** to quickly scroll through pages.

9 To navigate to a specific page, tap the **Page Number** icon, type the page number in the field that appears and press **Enter** on your keyboard.
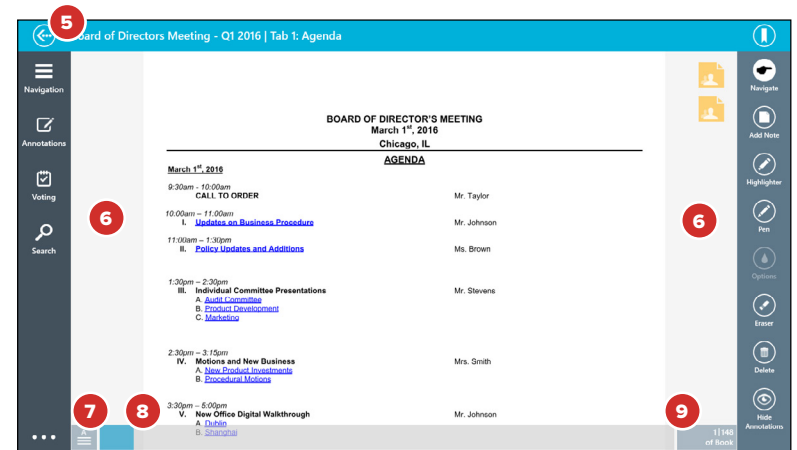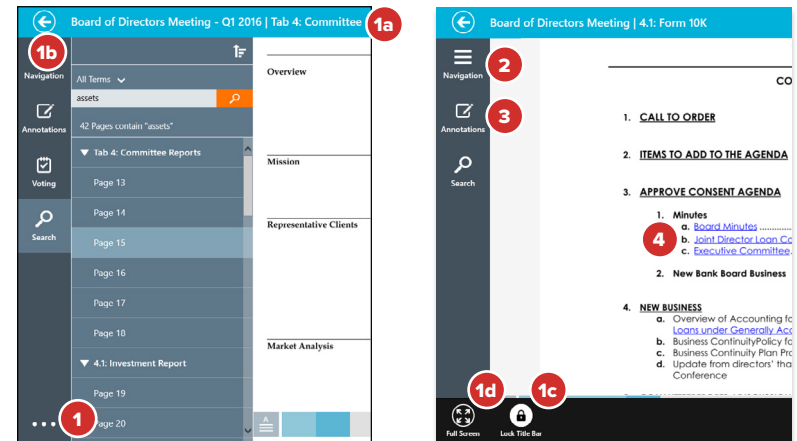
Book Navigation— Navigation Panel

The Navigation Outline will allow you to view and navigate the contents of a book.

1 Tap the **Navigation** icon to open the Navigation Outline.

2 The Navigation Outline displays a list of all the tabs and sub tabs in the book.

  2a Tapping a tab or sub tab title will take you to the relevant section of the book.

  2b The titles in the Navigation Outline will remain highlighted as you navigate through their corresponding pages.

3 Tapping the arrow icon next to a tab name will expand or collapse the sections in that tab.

4 Tap the **Expand/Collapse** icon to expand or collapse all of the sections in the menu at once.

Note: When your Windows device is in portrait orientation, or if Diligent Boards is using a view that makes it taller than it is wide, the Navigation Panel will display as a hover menu over the page. In this mode, tapping an item in the Navigation Panel will close the hover menu and take you to the relevant section of the book.

Tip: You can always hide or show the Navigation Panel by selecting the "Navigation" icon.

Book Navigation— Search

1 To find words or phrases in the book, tap the **Search** icon.

Note: Tap the Search icon again to close the search menu. Search requires an Internet connection.

2 Select the **Search** field and type in the terms you would like to look for. Tap or click the orange **Search** button; the search itself may take several moments.

3 **Search results** will appear in an outline. Tap or click a result to go to that page.
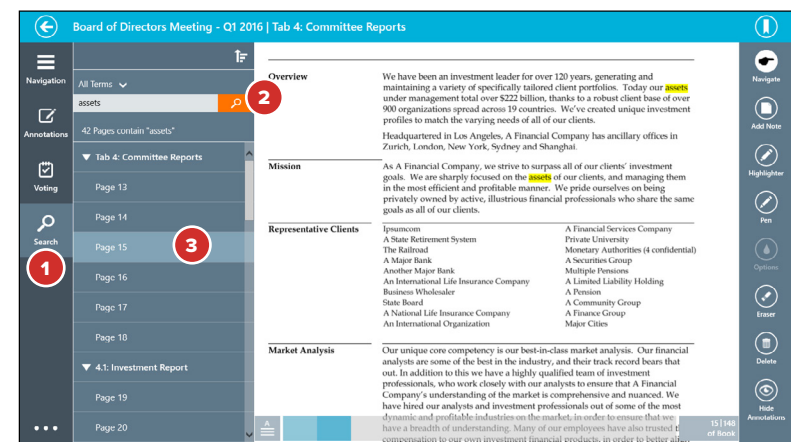
Markup Toolbar (Create Annotations)

The Markup Toolbar will display several options to create annotations, which includes Sticky Notes, Page Markups and Bookmarks.

Tip: To show or hide the Annotations Toolbar, swipe up anywhere from the bottom border of the screen and select the "Annotate" icon in the bottom app bar.

1 Tap the upper-right-hand corner to **Bookmark** the page. This can be done out of markup mode as well, by tapping in the upper-right corner of the document.

2 The **Add Note** icon will open a note on the screen where you can type information using your keyboard.

Tip: You can also tap and hold your finger anywhere on the page to create a note there.

2a Tap the **Expand** icon to see more of the note at once.

2b When finished typing, tap **Save.**

2c Upon saving your note, a stack with note icons will appear on the right side of the page. Notes you have created appear yellow. Tap the icon to view or edit the note. Tap and hold the icon to move it anywhere on the page.

Tip: If the note time stamp setting is enabled by your administrator, a time stamp indicating the time the note was created will appear in the corner. This time stamp will update if the note is edited. If the note is shared, the time stamp will reflect when others could first see the note.

3 Notes that are being shared with you by others appear blue. You can read these notes, but you cannot move them or change the original note message.

4 The **Highlighter** tool draws a thick translucent line on the page.

5 The **Pen** tool draws a solid line on the page.

6 When the highlighter or pen tool is selected, tapping the **Options** icon will display a panel with options.

6a Tap a **Color** swatch to change the color of the pen or highlighter.

6b The panel for the pen tool will include options to set the **Line Thickness.**

Tip: Creating markups can also be done using a Windows stylus pen, which is available at most office supply stores.

7 Tap the **Navigate** icon to turn pages and zoom without drawing on the page. This effectively turns off the pen and highlighter tools.
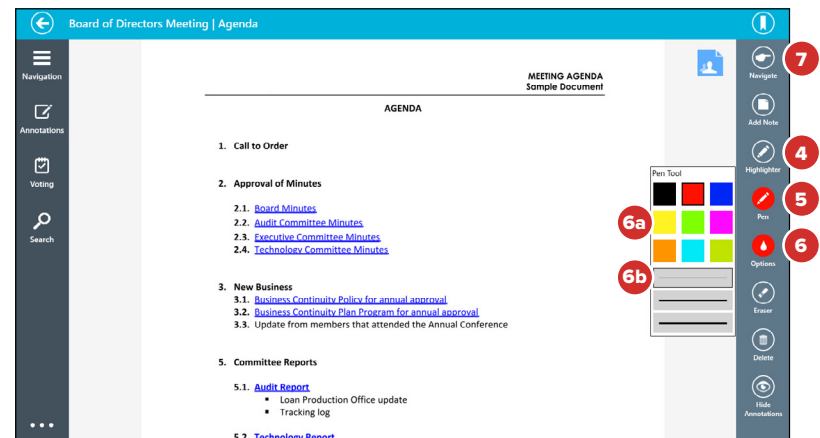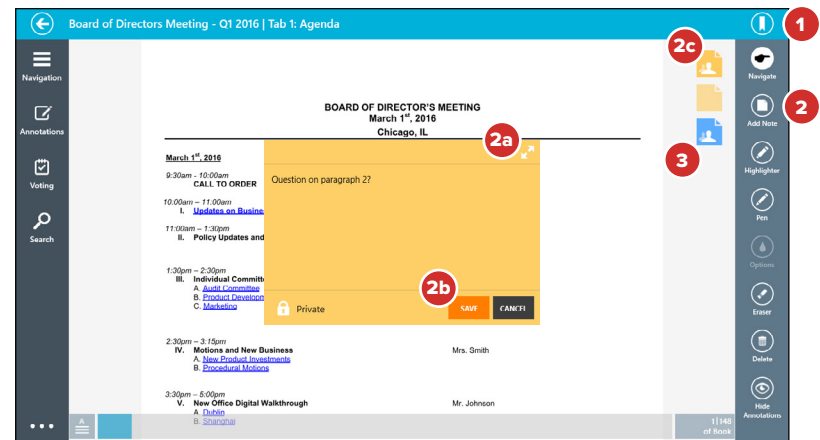
Markup Toolbar (Create Annotations)— Continued

8 The **Eraser** tool allows you to delete individual pen or highlight markups on the page. When this option is selected, slide your finger or stylus over any part of the markup line. The entire stroke of the line will be deleted.

Note: The Eraser tool works only with pen and highlight markups. Once a markup has been erased, it cannot be retrieved.

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

10 To keep your annotations from appearing on the screen, tap the **Hide Annotations** icon. Tap this button again to reveal your annotations.
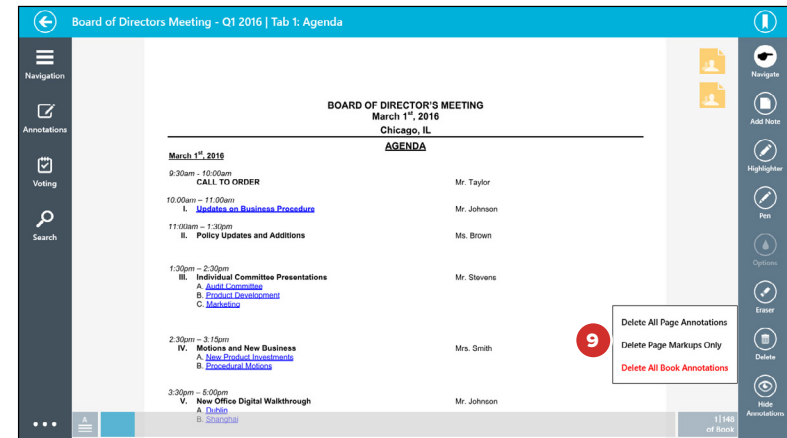
Annotations Panel

The Annotations Outline can be used to preview and manage all of the notes in the entire book.

1 Tap the **Annotations** icon to open the outline.

2 The annotations panel displays all sticky notes on each page.

2a Tapping a **Note Preview** from the list will take you directly to the page associated with the note and open the note on the screen.

3 If a page has been bookmarked or has markups, the relevant icons will appear in the row with the associated page number. Selecting this page row will take you to the document without opening any notes.

4 Tap the **Refresh** icon to sync any recent changes that may have been made to annotations that are being shared with you, or that you've made on other devices.

Note: Changes to notes will automatically sync every 30 seconds; you don't need to do anything. If your site has note commenting enabled, comments will also auto-sync.

5 Tap the **Expand/Collapse** icon to expand or collapse all of the sections in the menu at once.
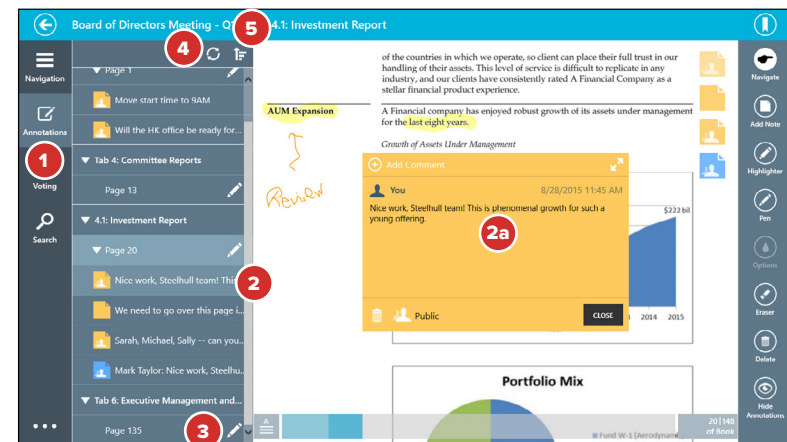
Sharing Notes

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

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, select **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. Select the name of each person you'd like to share the note with.

5 Use the **Search** field to search the list of people. Typing into this field will reveal search results as you type.

6 Select **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 or click 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 or click **Share** to publish the note and make it visible to others.

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.

9 Notes that you share will appear to others in blue. Shared notes will appear in all versions of Diligent Boards.
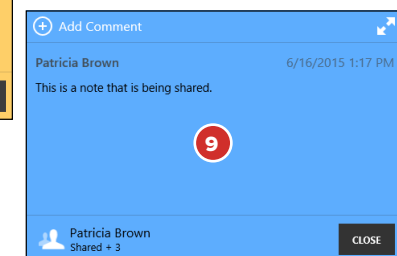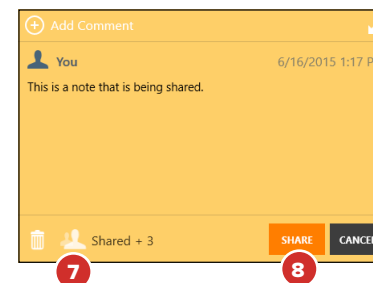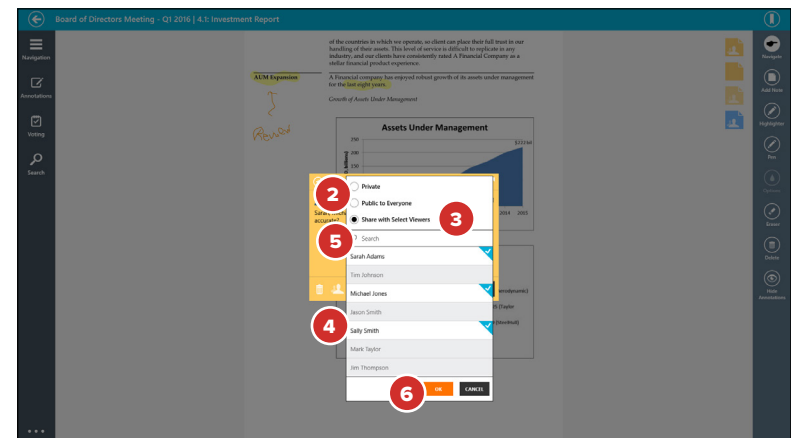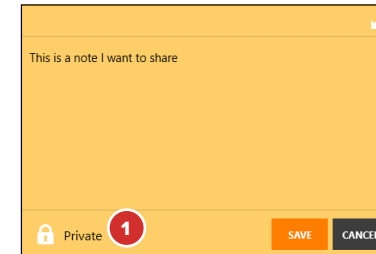
Commenting on Notes

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 Books that contain comments you haven't read yet will display a speech button above the annotations icon on the book tile. Click or tap the annotations icon.

2 In the annotations flyout that appears, every note containing comments you haven't read will display the same speech bubble icon. Tap any one of these to open the book up to the page the note is on.

Note: If a note has comments you haven't read, the speech bubble icon will also appear on the note, both in the annotations panel and on the page where the note appears.

3 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 or scroll up and down this list to see more of them.

4 Tap the **Expand** icon to reveal more of a long comment list at once.

5 While viewing a shared note, tap **Add Comment**.

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

6 Type your comment into the text field.

Note: The maximum comment length is 300 characters.

7 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.

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, tap and hold or right-click it and select **Delete Comment** when it appears. No one will be able to see the comment after it has been deleted. A record of removal will take the place of any deleted comment.

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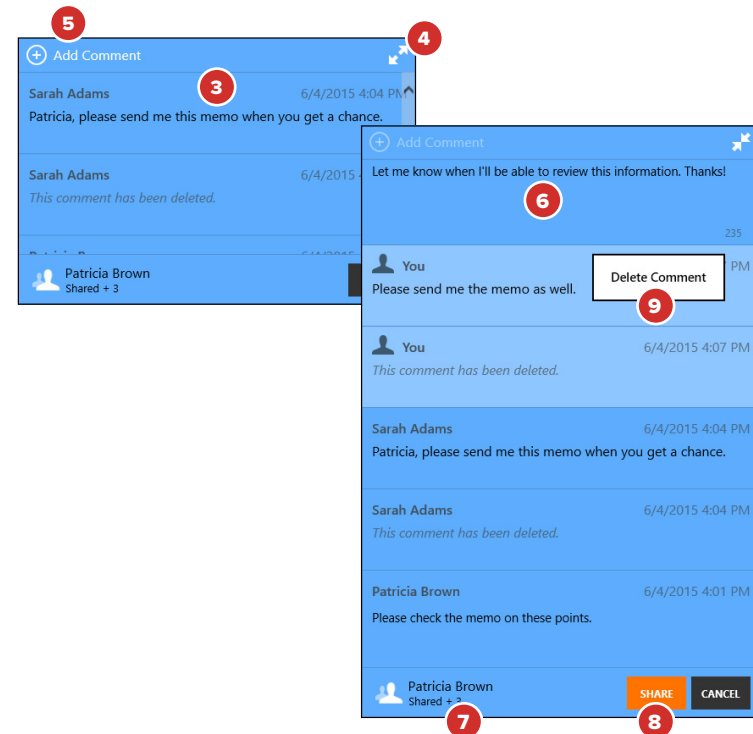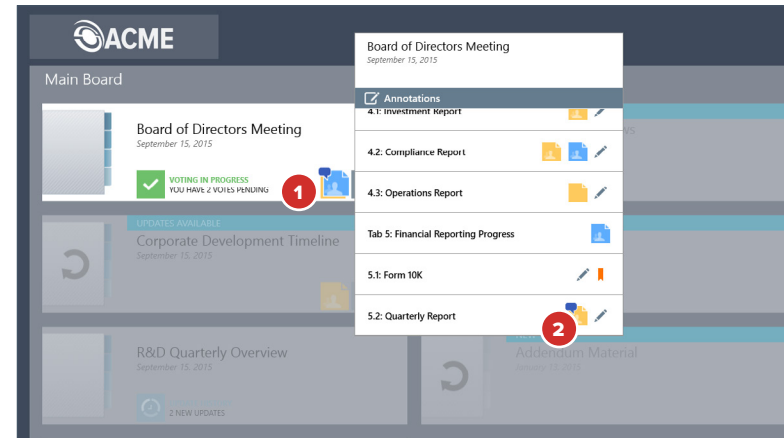
Note Saver

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 and those changes have been synced, tap the **Annotations button**. The annotations panel will appear.

2 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.

3 Tap the **Removed Page** to see a copy of the old page, with annotations in place.

Note: If you don't want to see removed pages in your annotations list, you can change the filter setting at the top-left of the list from "Off" to "Current Pages Only." You can also set the filter to show "Removed Pages Only."

4 To print or export the page to PDF for your records, or to delete it entirely, tap the **Ellipses** button to open the bottom app bar.

5 To discard the removed page, tap or click the **Delete Page** button.

6 Tap **Export** to create a PDF of one or more removed pages, with or without an annotation summary. You'll be able to save the PDF or share it using your installed sharing applications, if available.

7 Tap **Print** to print one or more removed pages, with or without an annotation summary.

8 To move annotations back into the book, use the **Compare** button. You may need to tap or click anywhere on the screen to dismiss the bottom app bar first.
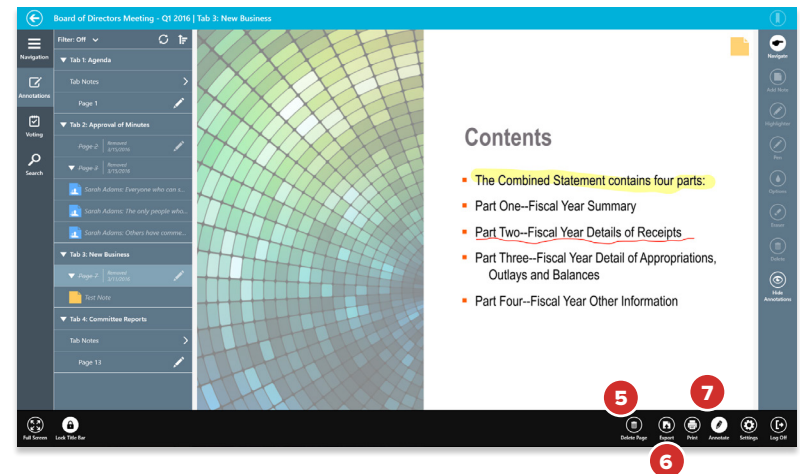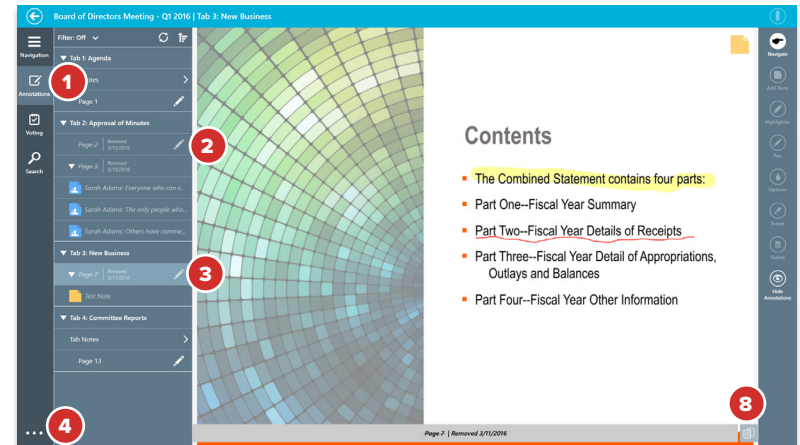
Note Saver — Continued

9 The removed page will appear as a thumbnail over the equivalent current page. You can navigate the book as you normally would until the old version of the page appears.

10 Use **Move All** ↩ to move all of the annotations from the removed page to the open page.

11 Use **Delete All** 🗑 to discard the removed page, as well as all annotations.

12 You can also **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.

13 To return to the removed page, tap or click its **Thumbnail**.

14 To continue viewing the current book with the thumbnail closed, tap the **X** button to the right of the thumbnail.

15 With the thumbnail closed, you can still move annotations from removed pages back into the book. While viewing the current page, tap and hold or right-click the removed page in the annotations list. Select **Move All** when the menu appears. You can also choose to **Delete Page** from this menu, which removes the recovered page.
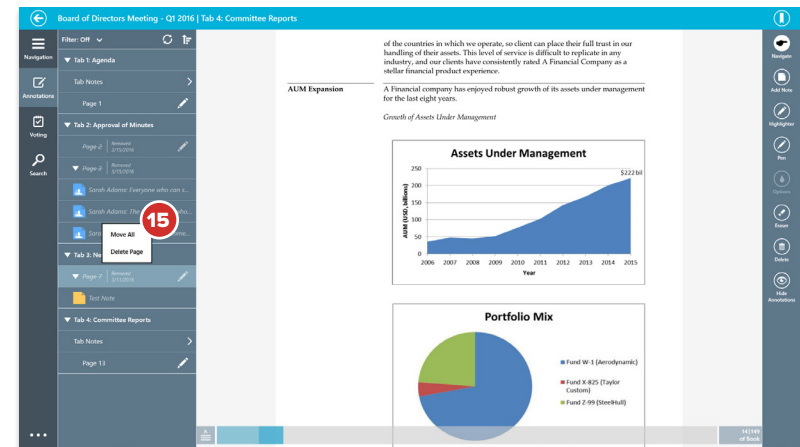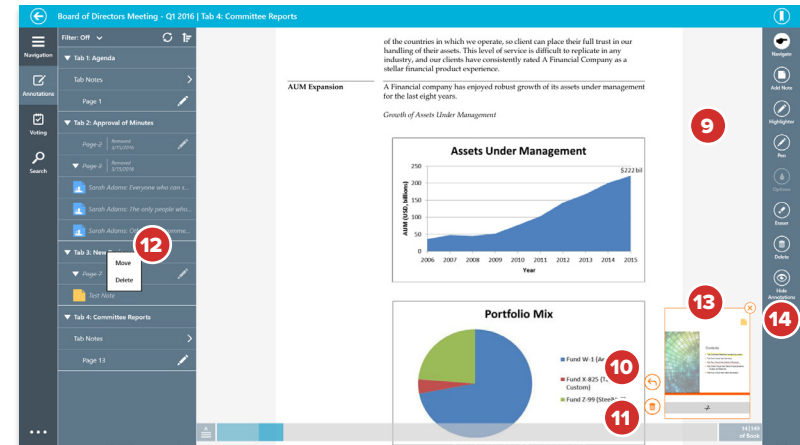
Tab-Level Notes

Tab-level notes are notes that reference an entire tab, rather than a specific page within the tab. Diligent Boards for Windows will display tab notes created on Diligent Boards OneClick and the Diligent Boards Web Client. It will also convert notes to tab notes if the page the note is on is removed or replaced.

Note: You cannot create tab notes in Diligent Boards for Windows. Tab notes will appear, however, if they were created in Diligent Boards OneClick or the Diligent Boards Web Client, or when the corresponding document to a sticky note is deleted or replaced.

1 Select the row labeled **Tab Notes** to view a list of all tab notes available. A tab note is dynamically created under the tab name of the book with which it is associated.

2 Tap on a tab note in the list to open it on the page and allow you to edit or delete it. Each note within the list will display a limited preview of its contents.

Note: Public notes shared by other users will also appear in the tab note list. Tapping a public tab note will open it on the screen and allow you to read the contents. You cannot edit or delete another user's public note.

3 Press and hold or right-click on a tab note to reveal the following options:

    3a Select **Move** to move the tab note to the current page. This will remove it from the tab notes list.

    3b Select **Delete** to delete the highlighted tab note.

    3c Select **Delete All** to delete every tab note in the list. This will only delete notes you created, not notes that have been shared with you.

4 To return to the Annotations Outline, tap the **Back** arrow or the tab title at the top of the tab notes list.
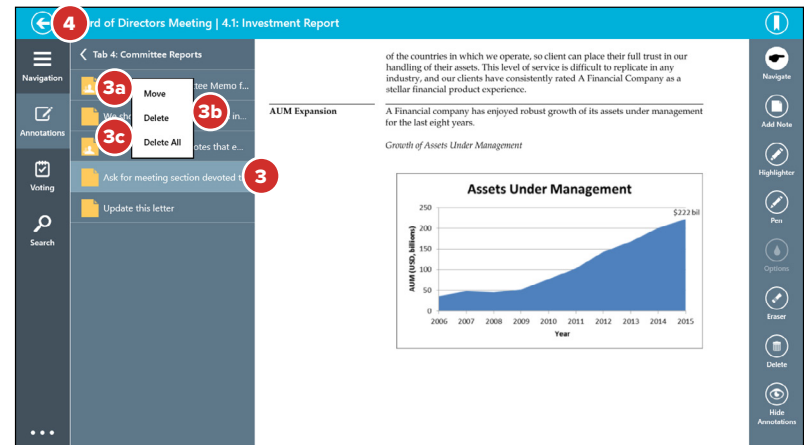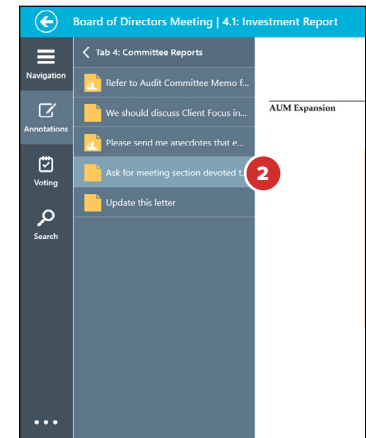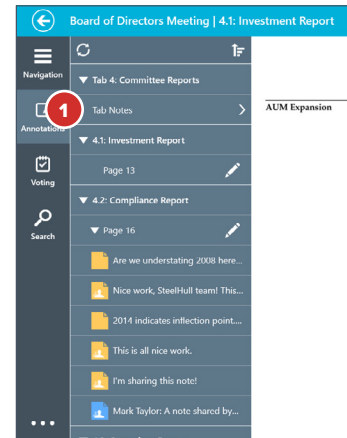
Sync Annotations Across Devices

Annotations created on most devices can be synced across all devices as a background process. A few highlights are outlined below.

- 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 servers as a background process.
- Your sticky notes will be available on all devices you use to access Diligent Boards and will automatically appear in the annotations panel for the relevant page of the book.
- All of your other annotations, including your highlights and pen markups, will be available on any Windows device or iPad you use to access Diligent Boards. They will appear automatically on the relevant page of the book.

Note: Your Windows device will automatically sync any sticky notes created on other devices when you first log in or any time you use the "Check for Updates" feature.

Note: Highlights made in Diligent Boards OneClick will not sync to Windows devices or the iPad.

- When you manually delete an annotation on any device, it will be permanently deleted from all devices.

Exporting Annotations

Annotations can be saved as a PDF file, as well as emailed via built-in Windows sharing tools.

Note: Annotations can only be exported from current books and offline items in the Resource Center.

1 While reading a current book or offline Resource Center item, tap the **Ellipses** button in the lower-left corner of the screen or slide your finger up from the bottom edge of the screen to reveal the bottom app bar. If you are using the mouse, click the right mouse button to reveal the bottom app bar.

2 Tap **Export.** An Export Annotations menu will appear on the right side of the screen.

Note: If the Export button does not appear, exporting annotations may have been disabled by your site's administrator.

3 Select what you would like to export from the **Annotations Range** menu. You can select to export the current page, the current tab, the entire book or any combination of tabs. Only sections of the book that have annotations will be available in this list.

Note: When exporting annotations from the Resource Center, you can select to export the current page (if it's annotated), all annotations on the current document, or all annotated pages on every document in the current folder.

4 Choose whether you would like to include an annotation summary in your export by selecting from the **Annotation Summary** menu. This summary will contain a list of pages that contain bookmarks, pen marks, highlights and sticky notes. It will also contain sticky note content. To print just the annotations summary, select **Summary Only** from this list.

5 Select **Save As** to save a PDF of your selected annotations to your local or network storage.

6 Select **Share** to send a PDF of your selected annotations via email. The Windows sharing tools menu may contain other options for sharing your annotations, depending on your computer's settings.
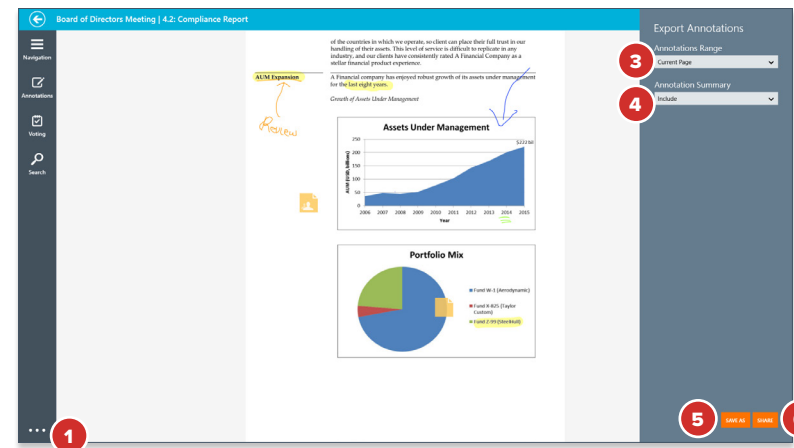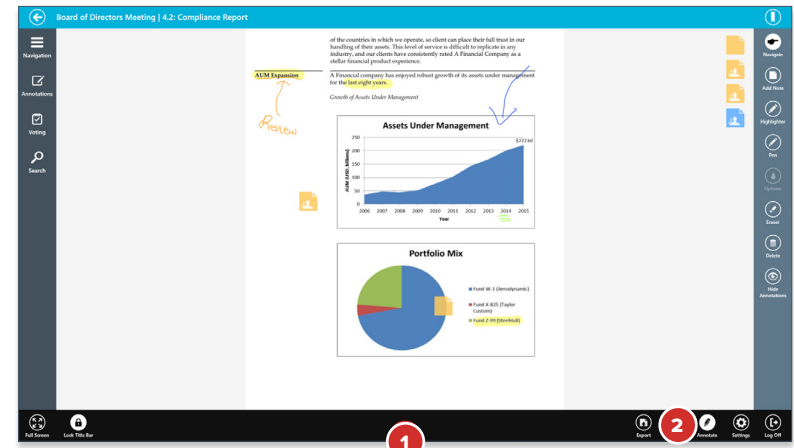
Exporting Annotations— Continued

7 If you've chosen to save a PDF, the **Save** screen will appear. Tap the arrow to the right of **This PC** to switch between local storage and any cloud storage solutions you may have.

**8** **The name of the folder or location** you will be saving to will be to the right of **This PC**. This will usually be set to the desktop by default.

9 Tap **Go Up** to move up one folder level, to the parent folder of the one you're currently in.

10 Tap any Folder button to move into that folder.

11 Type the name of the PDF into the **Name** field at the bottom of the screen.

12 Tap **Save** to complete the PDF export.

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

13 If you've chosen to share a PDF, the Share charm will appear. Tap **Mail** to send an email that will include an attached PDF of your selected annotations. Besides this attachment, the email will be blank.

Note: If the mail icon does not appear in the Share charm, it may be disabled in your . PC settings.

Note: Other options besides Mail may appear in the Share charm, depending on your PC configuration. These third-party applications may not always function correctly with exported annotations.
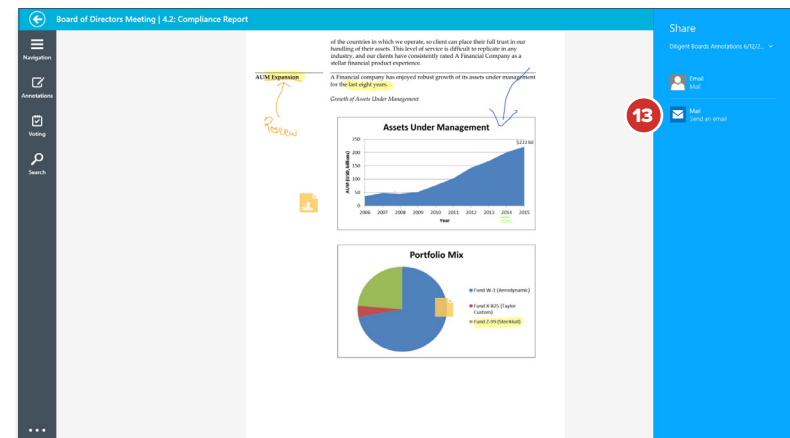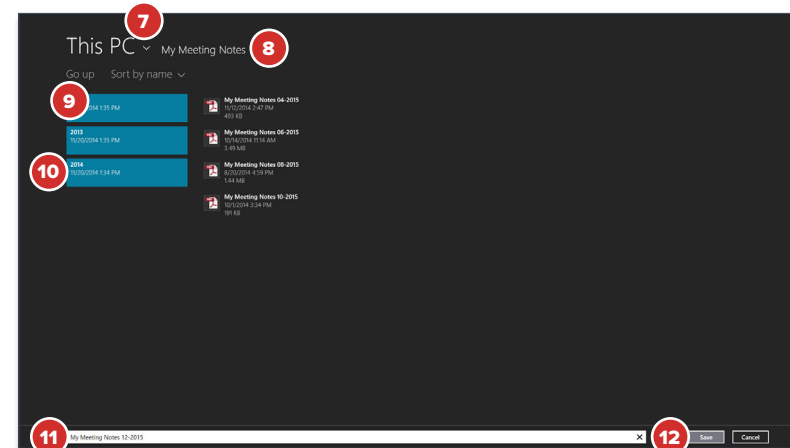
Printing

Selected tabs or pages of the book, including annotated pages, can be printed directly from the page view of any current book.

Note: Printing is available in current books and for offline items in the Resource Center. It is not available in archived books or online-only Resource Center items.

1 While reading a current book or offline Resource Center item, tap the Ellipses button in the lower-left corner of the screen or slide your finger up from the bottom edge of the screen to reveal the bottom app bar. If you are using the mouse, click the right mouse button to reveal the bottom app bar.

2 Tap **Print.** The Print Settings menu will appear on the right side of the screen.

Note: If the Print button does not appear, printing may have been disabled by your site's administrator.

3 To print book content, select the **Print Pages** option.

4 To print annotated content only, select the **Print Annotations** option.

5 If you've chosen to print pages, select what you would like to print from the **Page Range** menu. You can select to print the current page, the current tab or the entire book. You can also type in a custom page range, separating your chosen pages with commas and dashes. For example, to print just pages 3 and 14 through 27, type **3, 14-27** into the field.

Note: When printing from the Resource Center, you can select to print the current page, the current document or all synced documents in the folder.

6 Slide **Include Annotations** to Yes if you would like your pen marks, highlights, bookmarks and sticky note locations to appear on your printed pages. An annotation summary containing your sticky note content will also be added to the start of the print job.

7 Tap **Continue.**
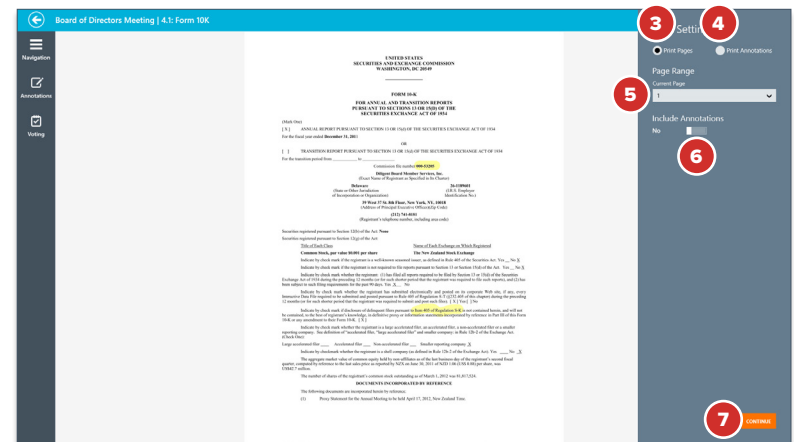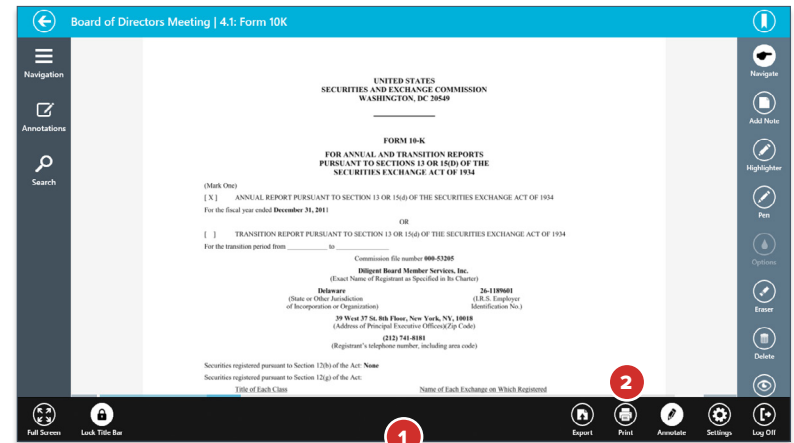
Printing— Continued

8 If you've chosen to print annotations, select what you would like to print from the **Annotations Range** menu. You can select to print the current page, the current tab, the entire book or any combination of tabs. Only sections of the book that have annotations will be available in this list.

Note: When printing annotations from the Resource Center, you can select to print the current page (if it's annotated), all annotations on the current document, or all annotated pages on every document in the current folder.

9 Choose whether you would like to include an annotation summary in your printout by selecting from the **Annotation Summary** menu. This summary will contain your sticky note content. You can also print just the summary.

10 Tap **Continue.**

11 In the **Printer List**, tap the printer you want to use.

12 In the menu that appears, select how many **Copies** of your selection should be printed.

13 You may check your print selection using the **Print Preview.**

14 Additional options, like printer duplexing or color selection, will appear depending on the capabilities of your printer.

15 Tap **More settings** to choose additional options, including page orientation, collation settings and paper quality configuration.

Note: Tap the back button by the name of your printer at the top of the "More settings" menu to return to the print settings menu.

16 Tap **Print.** Your print job will begin.

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 as a PDF via the Print dialog..
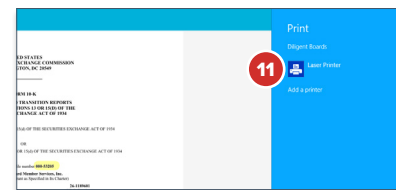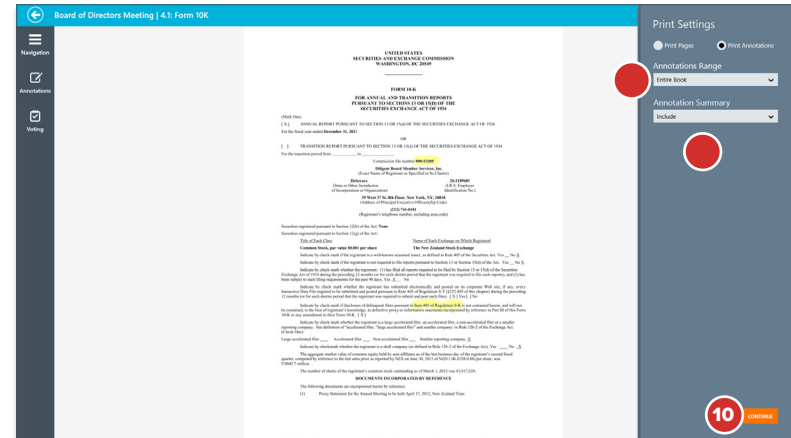
Windows 8.1
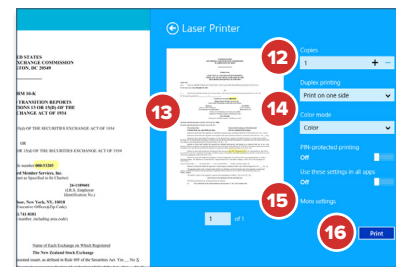
Windows 8.1

Windows 10

Contacts

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

1 Select the **Contacts** button in the top menu bar. The contacts panel will open and display the combined list of board members and company contacts.

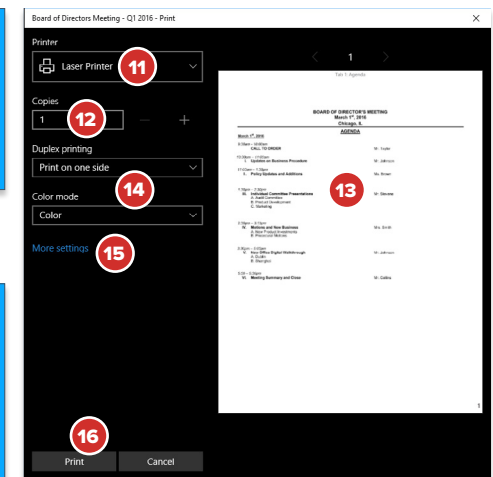**2** Select **All Committees** to filter by contacts affiliated with a specific committee.

3 Select **All Contacts** to filter by board members or board-affiliated contacts.

4 Select **Sort By** to sort visible contacts by first or last name.

5 Tap in the **Search Bar** and type to find a contact by name.

Note: You can also find a contact by name by pinching in on your touchscreen to reveal a set of letters. Selecting a letter will bring you to the corresponding section of the list.

6 To email your board administrators, or to email all board members associated with a specific meeting group, select the **Email** button in the bottom app bar, and choose the group you would like to email from the menu that appears.

Note: Diligent Boards uses your default email application. This application must be set up in order to use email in Diligent Boards.

7 Selecting a member's contact tile will display their relevant contact information.

8 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.

9 To edit your contact details, select your name in the contacts list. From the bottom app bar, select **Edit**.

Note: You can also go to your details by selecting "My Details" from the bottom app bar.

10 Tap **Add Photo** to take a new photo using your device camera, or to choose an existing photo.

11 Tap any detail's field to edit that detail. Some details, like first and last name, may only be edited by your administrator.

12 Tap **Save** in the bottom app bar when you've completed your changes.
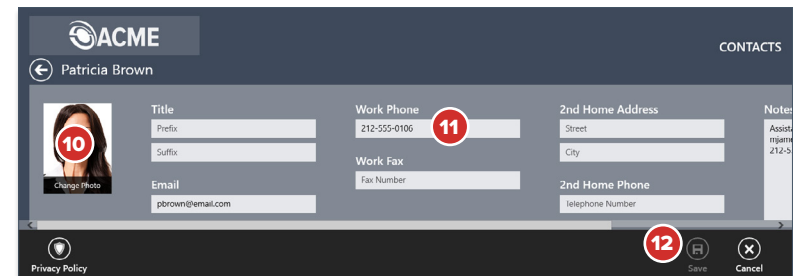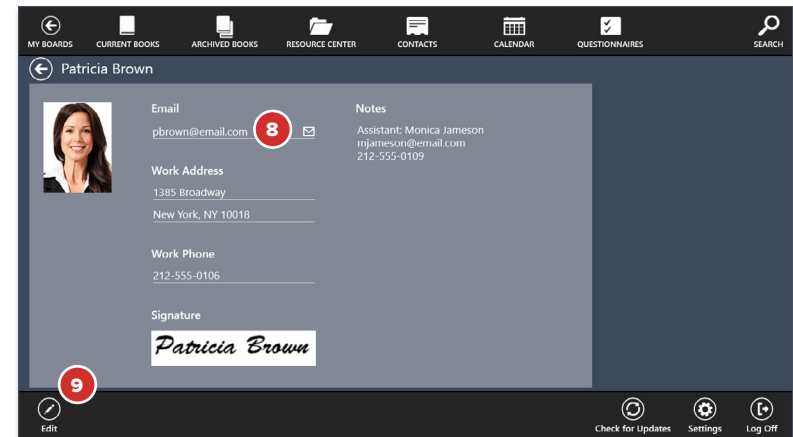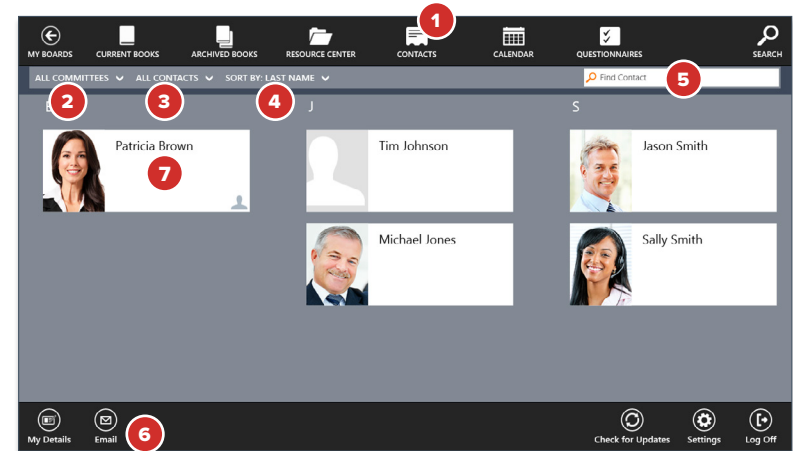
Adding or Updating a Signature

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, either select **Your Name** from the list of contacts or select **My Details** from the bottom app bar.

2 In the contact detail view, select **Edit** from the bottom app bar.

3 Select the **Add Signature** button that appears. If you already have a signature, select it now to change it.

4 A signing interface will appear. Sign the field on this screen.

Note: If the signature field is too small or too large, you can change its size by pinching in or out on your touchscreen.

5 To clear the signature field and try signing again, select **Redo.**

6 To close the signing interface without saving a signature, use the **Back** button.

7 To accept your signature changes, tap **Confirm.** Your signature won't be saved to your profile just yet.

8 You will return to your contact information. To save your signature to your contact information, tap **Save**.
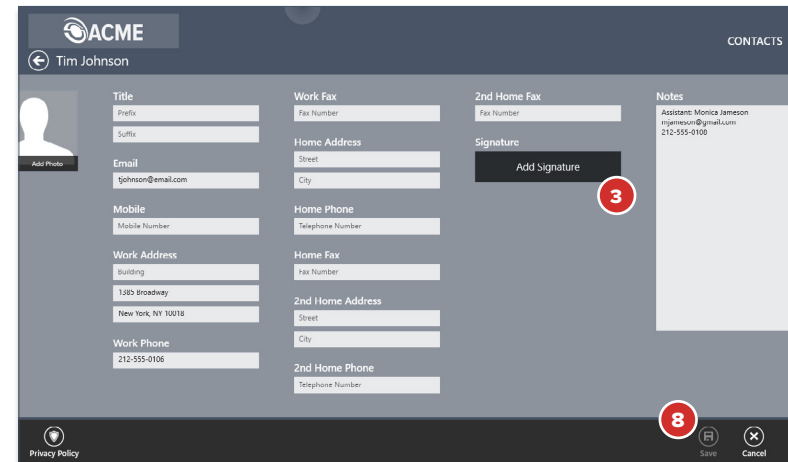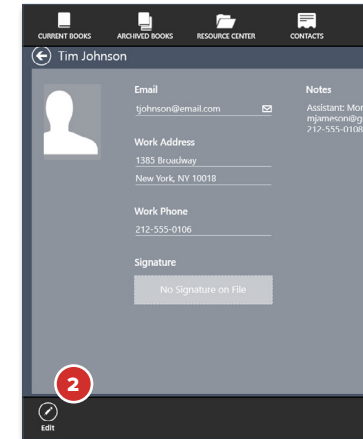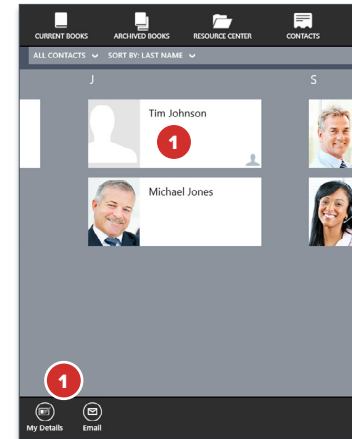
Calendar

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

1 Tap the **Calendar** button in the top menu bar. The calendar will appear.

2 Tap the **Year** button in the bottom app bar to view an entire year's worth of events at once. Meeting dates are highlighted in blue. The current date is highlighted in orange.

3 Tap the **Filter** arrow to view only events specific to a board or committee.

4 Tap **Check for Updates** to make sure you have the most current version of your board calendar.

Note: The calendar will also automatically check for updates the first time you access it after logging in.

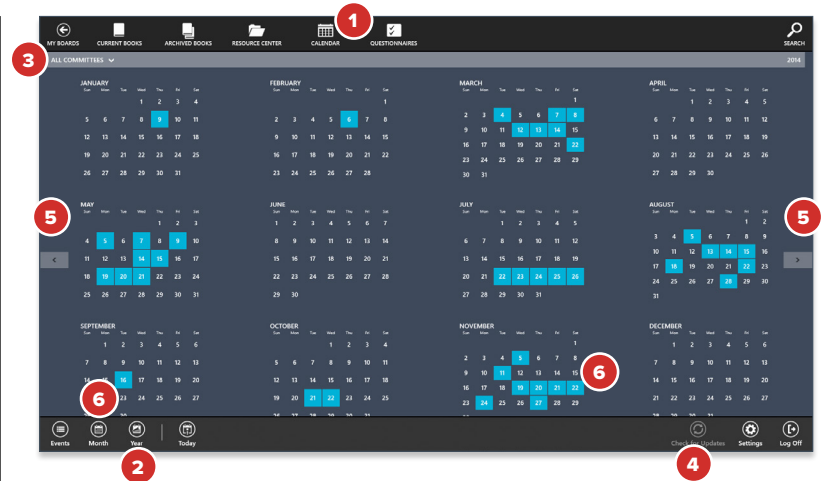**5** Slide your finger left-to-right or right-to-left to view earlier or later years.

Note: If you are using a keyboard and mouse, left and right arrows will appear on the sides of the display. Click these to move to different years.

6 Tap any month on the calendar to view just that month. You can also tap the **Month** button.

Note: You can return to year view from month view by tapping the year button, or by performing a pinch gesture on your touch display.

7 While in month view, tap any event to get detailed information about that event. If there are multiple events on a given day, you may have to select from an additional flyout menu.

8 Slide your finger left-to-right or right-to-left to view earlier or later months.

9 In any view, tap the **Today** button to return the calendar to the current date.

10 Tap the **Events** button in the bottom app bar to see a list of all of the events on the calendar.

Note: You can return to month view from event view by tapping the month button, or by performing a pinch gesture on your touch display.

Calendar— Continued

11 Slide your finger left-to-right or right-to-left to view earlier or later events.

12 Tap any event to view detailed information about it.

13 Event information contains the start and end date and time, the location of the event, and the committee associated with the event. It will also contain any details the administrator has chosen to provide.

14 Some event details may contain links. Tap on a link to be taken to the referenced section of the book, or to an external website or application.

15 If your administrator has Associated Books with an event, you can select and manage those books directly from the event information.

16 In the bottom app bar, select **Sync All** to sync all of the Current Books in the Associated Books list.

**17** Tap the **Back** button to return to viewing the calendar.
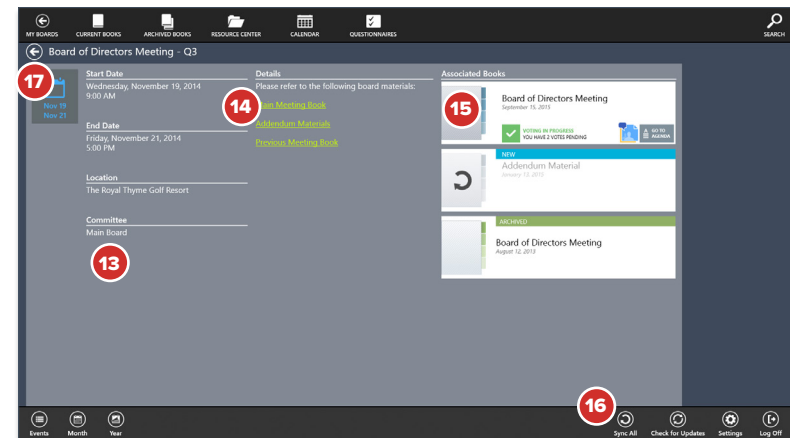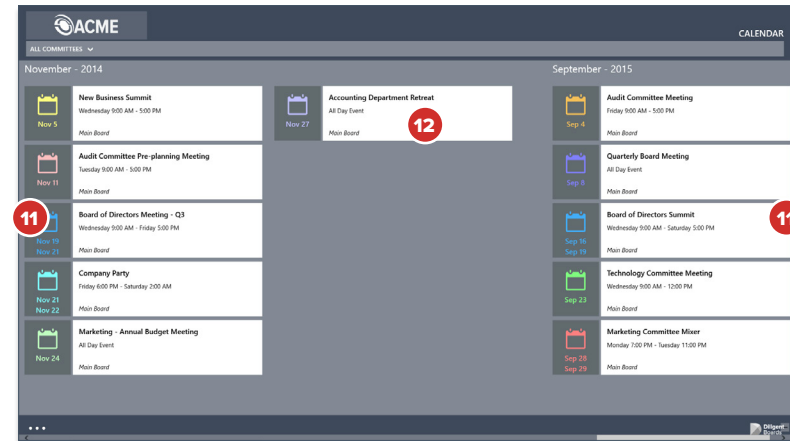
View Voting Items

Books can contain voting documents that will allow an electronic signature, or other response, to be cast.

1 The book tile will display a green voting icon if voting items are detected in the book. Tap this icon to reveal a list containing all of that book's voting items. This list will also note the status of your vote on each item.

2 Tap on any item in the list of voting documents to go to the first page of that voting document.

3 To cast your vote, tap on the **Signature Page** button to go directly to the page of the voting document that you need to sign.

4 Select the **Voting** icon in the left toolbar to view the voting outline. The outline will display another list of all of the voting items within the book.

5 Tap on the row of text for a voting item to view the first page of the relevant document.

6 Tap on the **Signature Page** button to view the page of the voting document that you need to sign.

Note: Each summary row will display the tab name, the current state of the vote and your voting status.

7 Tap on the **Status** button to view a status screen that gives detailed information about the voting document and the voting status of each participant (see following page).

Tip: When you select a row, that row will be highlighted in the voting panel and will remain highlighted until you navigate away from the voting document.
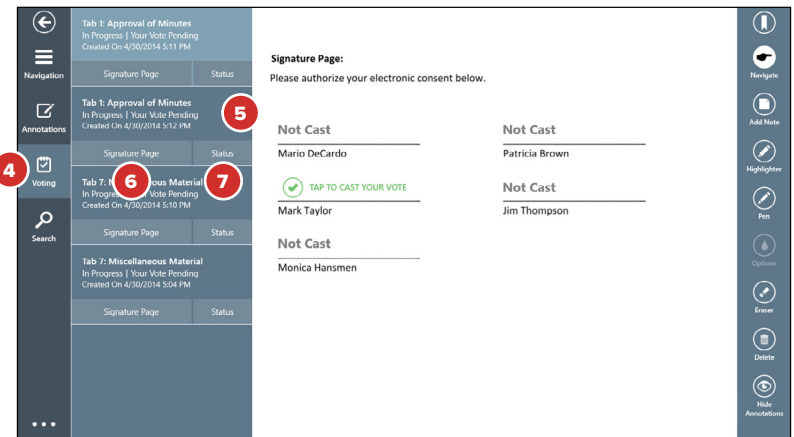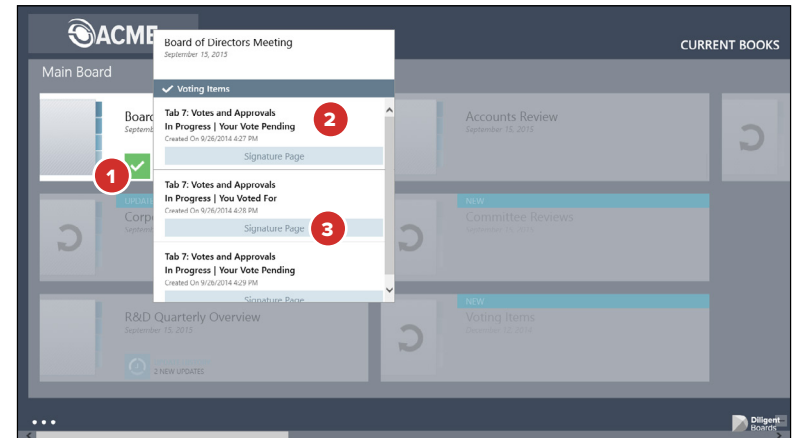
Voting Status and Signature Page

1   The Status window displays all the details of the selected voting document.

2   You can easily see the following voting details on the selected document:

    2a   The voting status of each Board Member participating in the vote.

    2b   How many votes are required to pass the vote.

3   Tap the button on the page labeled **Tap To Cast Your Vote** to display an action window that allows you to Vote For, Against or Abstain.

Note: The "Tap To Cast Your Vote" button will only appear on the signature page.

4   Tap an option in the menu to confirm your vote.

5   You can also vote by selecting the Voting Check icon in the top app bar. When the top app bar is locked, this will be 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: To cast a vote, you will need to be connected to the Internet via Wi-Fi or cellular network. Once you cast your vote, you cannot change it.

6   To return to the voting list view, tap or click the **Back** button.
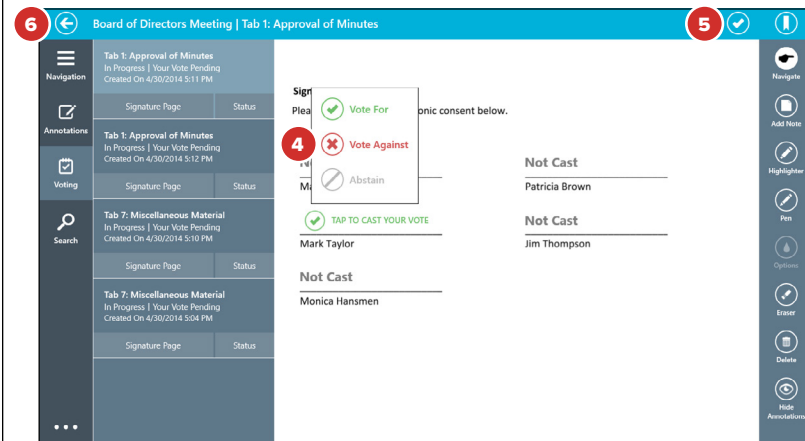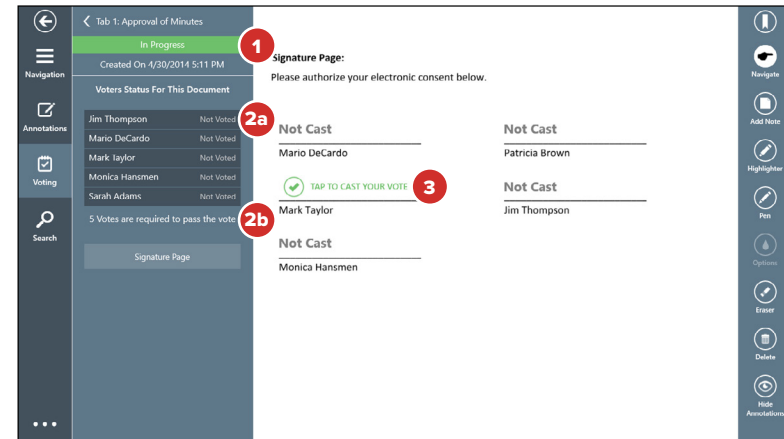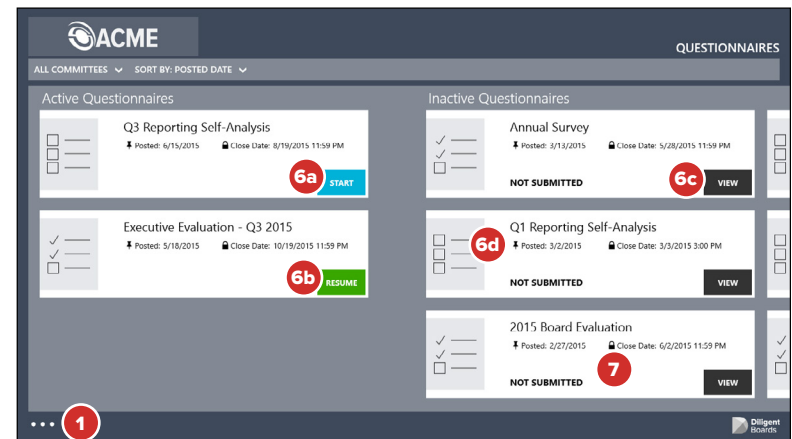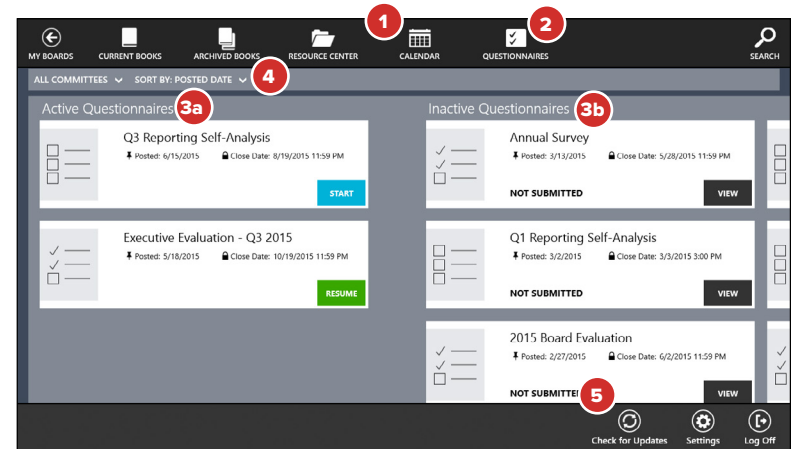
Questionnaires — Manage Questionnaires

Questionnaires allow you to view and respond to surveys where your input in requested. Progress is saved after every answer, so you can return to the questionnaire and continue at any time.

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

1 To access your questionnaires, tap the **Ellipses** button in the lower-left corner of the screen or swipe down anywhere from the top border of the screen.

2 Select the **Questionnaires** icon in the top app bar.

3 Questionnaires are categorized:

    3a **Active questionnaires** are pending your response.

    3b **Inactive questionnaires** are ones that you have already submitted or that have been closed for submission.

Note: To go directly to active or inactive questionnaires, pinch the screen and tap the "Active" or "Inactive" buttons that appear. Inactive questionnaires may be disabled by your administrator.

4 Select the **Filter** options to filter the search results by committee, or to sort results by either the start or end dates of the questionnaires.

5 Tap or click **Check for Updates** to make sure you have the most current list of questionnaires.

6 Each questionnaire tile may include the following labels:

    6a **Start** indicates a questionnaire that has yet to be started.

    6b **Resume** indicates that you have started the questionnaire, but have not yet completed it.

    6c **View** indicates that the questionnaire can be viewed but cannot be responded to.

    6d Each row will display the date the questionnaire was posted, as well as the close date, which is when all responses are due.

7 Tap anywhere on a questionnaire's row to open it.

Questionnaires — 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** 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** 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.

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.

Keyboard and Mouse Controls

Diligent Boards for Windows supports keyboard and mouse commands, so it can be used on Windows computers that don't have touchscreens.

1 Clicking the **left mouse button** has the same effect as tapping on a touchscreen with a finger.

2 Click the **right mouse button** anywhere but on a book to **reveal** and **hide both the top and bottom app bars.** The app bars can also be revealed and hidden with the keyboard by holding the Windows logo key ⊞ and pressing Z, or by clicking the **Ellipses** button in the lower-left corner of the screen.

3 You can move through the items in the top and bottom app bars by pressing **Tab** while the bars are visible. Press **Enter** to open the selected item.

4 **Right-click** a book to delete it, or to remove all the annotations in the book.

5 Click and drag the scroll bar or use the mouse wheel to scroll through Current Books, Archived Books and the Resource Center.

6 Click the **sync icon** of a book to copy it to your device for reading, if necessary.

Note: Some items are available online only, and do not have to be synced to be read.

7 Click on a book or Resource Center document to open the item in Page View.

8 In **Page View,** use the up and down arrows or the mouse wheel to scroll up and down the page.

9 Press the **Enter** key to go to the next page.

10 To quickly move around the book, click and drag the **scroll bar** at the bottom of the screen. If you do not see this scroll bar, click anywhere on the page to reveal it.

11 You can also click on the current page number, type in a new page number and press **Enter** to go directly to that page.

12 Click the **Back** button to return to the book list.

Note: To reveal the settings menu, hold the Windows logo key ⊞ and press the "i" key. Click anywhere off this menu to hide it.
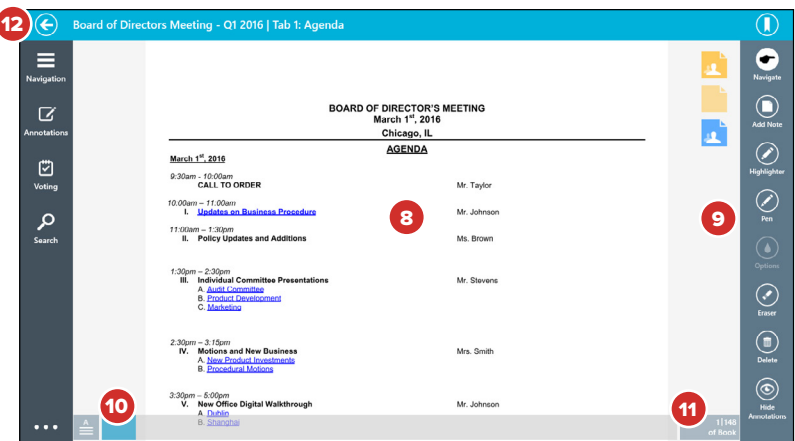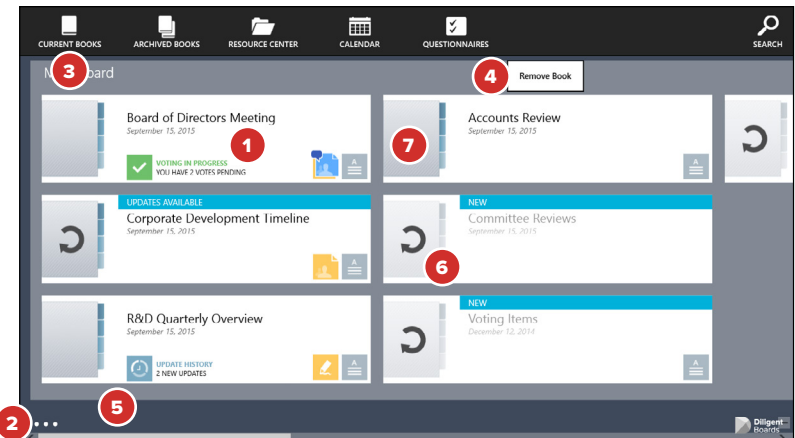
Keyboard and Mouse Controls — Reference Guide

Keyboard and Mouse Command	Action
Enter (in a book)*	Go to the next page
Shift + Enter (in a book)*	Go to the previous page
Right click (on book or item tile)	Open remove/delete book menu
Right click OR ⊞ + z	Show/hide top and bottom app bars
Tab (with top/bottom app bars open)	Select next icon in app bar
Enter (with top/bottom app bars open)	Open icon selected in app bar
Escape (with top/bottom app bars open)	Hide top and bottom app bars
Home	Go to the first book/item in the book list/Resource Center
End	Go to the last book/item in the book list/Resource Center
Ctrl + - (minus key)**	Show list of boards/committees
Ctrl + + (plus key)	Exit list of boards/committees
Page Up	Go to next page
Page Down	Go to previous page
⊞ + i	Settings menu

If this command isn't working, left-click anywhere on the page and try again.

**This command is only available while viewing the list of current books.*

Security— Change Password

Your Diligent Boards password can be changed within the Windows application.

1 To access the settings panel, tap the **Ellipses** button in the lower-left corner of the screen. Select the **Settings** icon from the right of the bottom app bar.

2 Select the **Change Password** option in the list.

3 You will be presented with a pop-up window that will require the following:
   3a Your current password
   3b Your new password
   3c 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 eight or more characters and cannot contain your username.

4 Press the **Confirm** button to create your new password, which can now be used to log into Diligent Boards on any device.
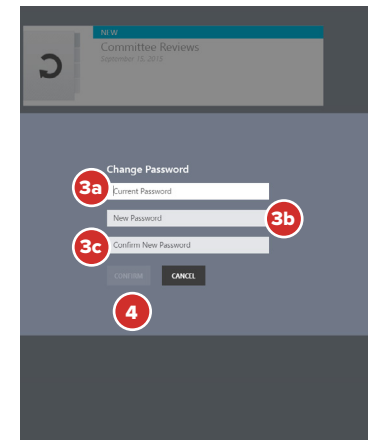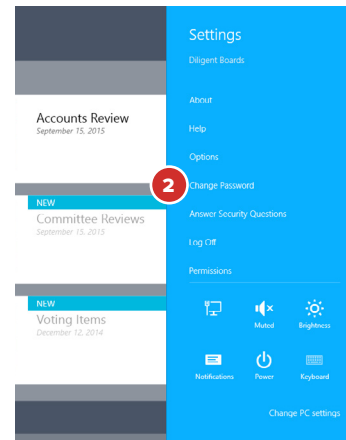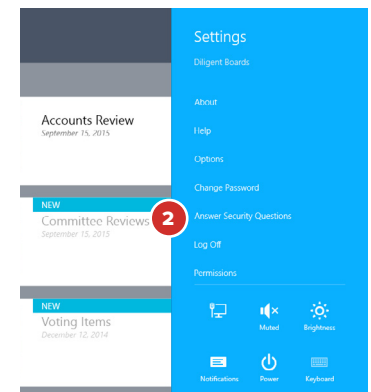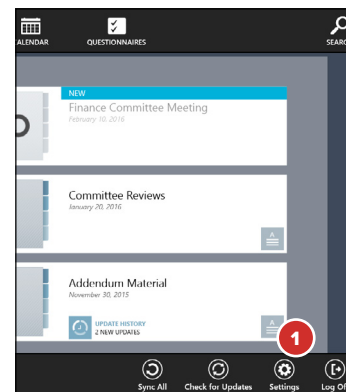

Security— Security Questions

Security questions can be managed within the Windows application. Security questions are used for identification purposes and are required in the event of a password reset.

1 To access the settings panel, tap the **Ellipses** button in the lower-left corner of the screen. Select the **Settings** icon from the right of the bottom app bar.

2 Select the **Answer Security Questions** option in the list. A list of question and response fields will appear.

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

3 Tap on the question field menu to see the list of available questions from which to choose.

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

Note: Answers must be at least five characters long, excluding spaces.

5 Previously answered questions will show the selected question and, depending on your site's settings, the masked response. These questions can be modified by tapping on the relevant field.

6 Tap the **Save** button to save your questions and responses. If you tap **Cancel,** your responses will not be saved.

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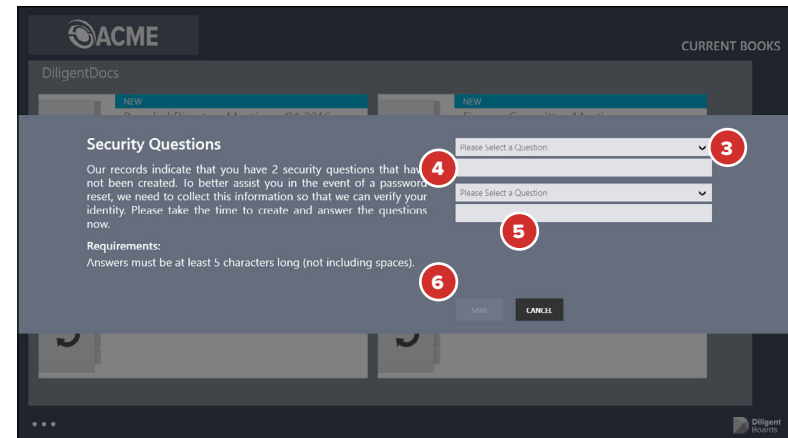
Security — Log Off

When finished viewing your materials, it is best practice for security to log out of Diligent Boards. This will require a password to re-enter the application.

1 To access the settings panel, tap the **Ellipses** button in the lower-left corner of the screen. Select the **Settings** icon from the right of the bottom app bar.

2 Select the **Log Off** option in the list. You will be prompted to confirm ending your session.

3 Click **OK** in the prompt and the application will return to the log-in screen.
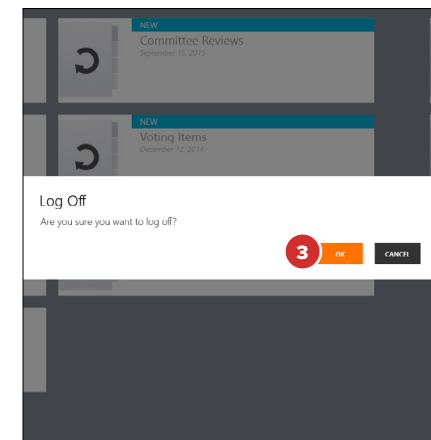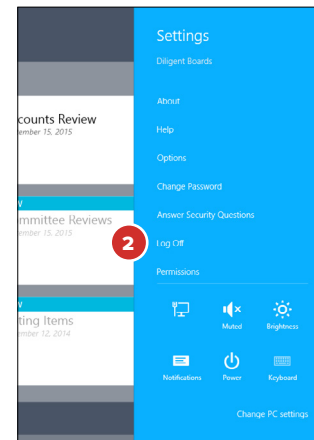
Settings and Personalization

Using general settings allows you to customize the board book experience to your precise needs.

Note: General settings are preconfigured to provide an optimal user experience by default. This section outlines what can be adjusted to further personalize your experience.

1 To access the settings panel, tap the **Ellipses** button in the lower-left corner of the screen, then select the **Settings** icon from the right side of the bottom app bar.

2 Tap **Options.**

General Settings

3 **Support Region** specifies which regional Support number displays at log-in. Choose "None Selected" to replace this with a link to a list of Support numbers.

4 **Archived Books Historical Timeline** sets how many years will be displayed in Archived Books. Use this setting to hide books that are very out-of-date.

5 **First Day of Week** sets which day of the week will appear in the left-most columns of the year view and month view of the calendar.

6 **Historical Timeline** sets how many past years will be displayed in the calendar. Use this setting to hide events that are very out-of-date.

Advanced Settings

7 **Auto Check For Updates** tells the Application to check for updated material on sign in, and when switching between content sections. It is enabled by default. Disabling this feature may speed up loading times, but board content updates will have to be checked for manually.

8 **Auto Sync Current Books** automatically downloads new content found upon a "check for updates." It is disabled by default.

9 **Reset Filters On Login** sets the Application to remove list view filters on Archived Books and the Resource Center when you log in, so all content is shown.

10 Select **Advanced Options.** The **Reset Application** button that appears will reset all Diligent Boards data, and should only be used if you are having significant difficulty syncing or viewing board materials.

Note: If you reset the application, all current books will have to be re-synced to your device. Depending on your site configuration, you may also lose all of your notes and annotations.
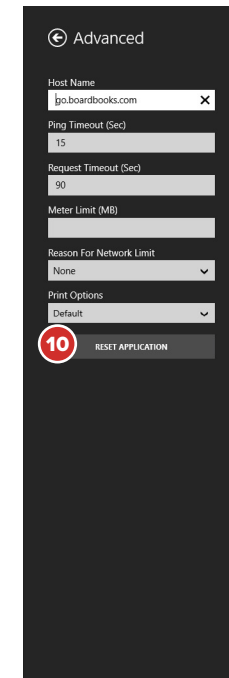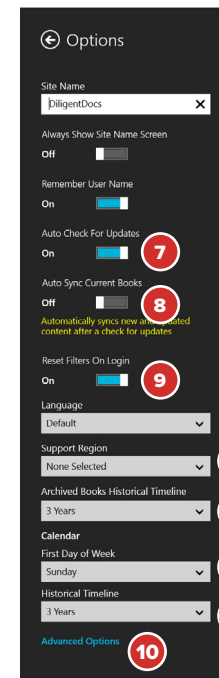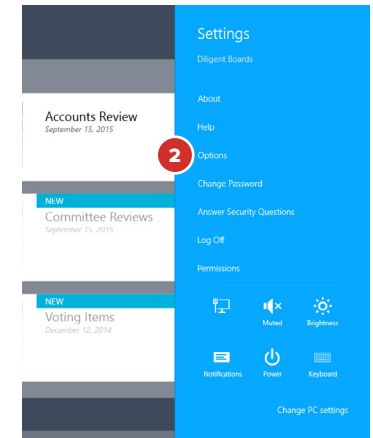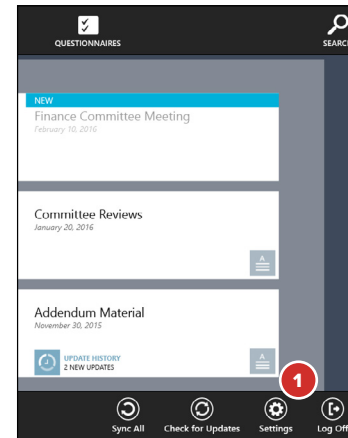
Forgot Password?

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

Note: To use the self-service password reset feature, you will need to have a valid email on file and to have answered all of your Security Questions.

1 Tap the **Forgot Password** link on the log-in screen of Diligent Boards for Windows.

2 The password reset website will open in your Web browser.

Tip: To exit out of split view mode, press and drag the vertical bar in the center of the screen to the far left or right depending on the application you want to focus on.

3 The steps below outline the self-service password reset sections:

3a Enter your User Name and tap the **Next** button. A unique security code will be sent to the email address you have on file.
Enter the security code that was sent to your email and tap **Next.** The password reset window will remain in its current state in case you need to close Internet Explorer to check your email on the same device.

Note: If you do not receive an email from Diligent Boards after completing step 3a, please check the spam folder of the email service you use. You can repeat step 3a as many times as necessary.

3b Upon entering the security code successfully, the next screen will prompt you to answer one or more **security questions** that you have on file. Please respond to all the questions listed and tap the **Next** button.

Note: Your security question responses are not case sensitive, but they need to be typed exactly how they were entered when created. This should include any hyphens or spaces between words.

3c The final screen will prompt you to enter a new password, and confirm it. After successfully creating the new password, you can return to Diligent Boards for Windows and use the new password to log in.
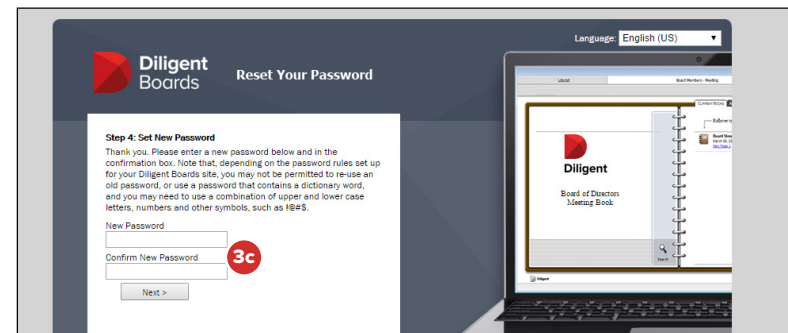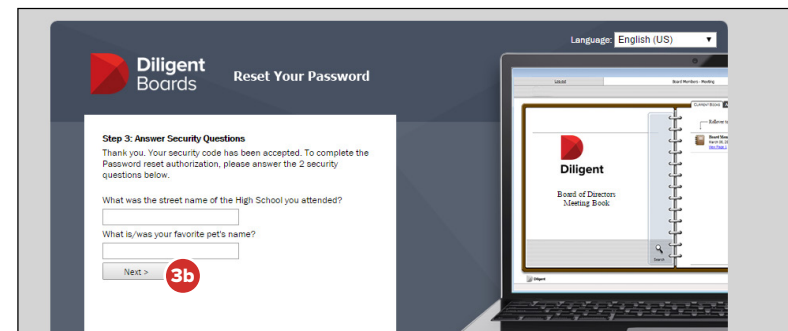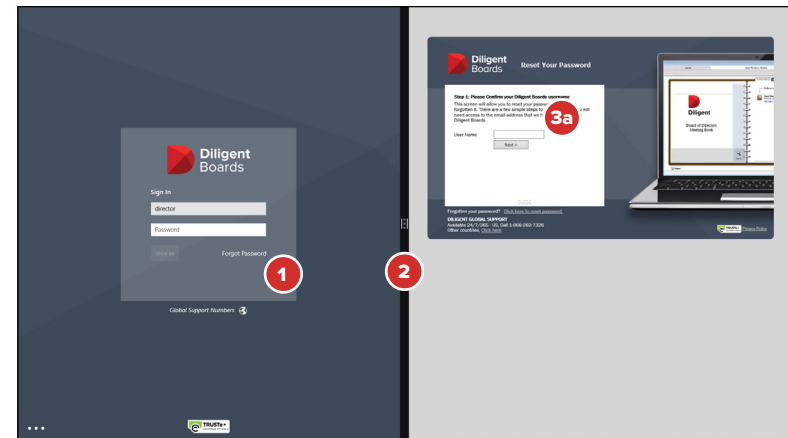
Language Settings

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

1 Diligent Boards supports the following languages:

- English (United States)
- Deutsch (Deutschland)– German (Germany)
- Español (América Latina)– Spanish (Latin America)
- Français (France)– French (France)
- Português (Brasil) – Portuguese (Brazil)
- 简体中文– Chinese (Simplified)

If you are using any regional variation of these languages, Diligent Boards will automatically translate itself to its variation of the same language.

2 To manually change the language, select **Settings** from the bottom app bar.

3 Select **Options** from the menu that appears.

4 Tap the **Language** menu and select the language you would like to use. To have Diligent Boards choose automatically based on your device language, select **Default**. Your change will be applied the next time you restart Diligent Boards.

App Setting: To use a language in Diligent Boards, that language must be installed on your device. If you install a new Diligent Boards-supported language, you must uninstall and reinstall Diligent Boards before you can use that language in the app.

Support Numbers by Region

The support number for each region can be accessed right at the log-in screen.

1 Tap the link below the log-in box labeled **Global Support Numbers.**

2 A menu containing a list of the Support Numbers for each region will appear on the right of the display.

App Setting: A setting is available to change the support number from the Global Support Number to one for your region. Please reference the "Support Region" description in the Settings and Personalization section of this manual.
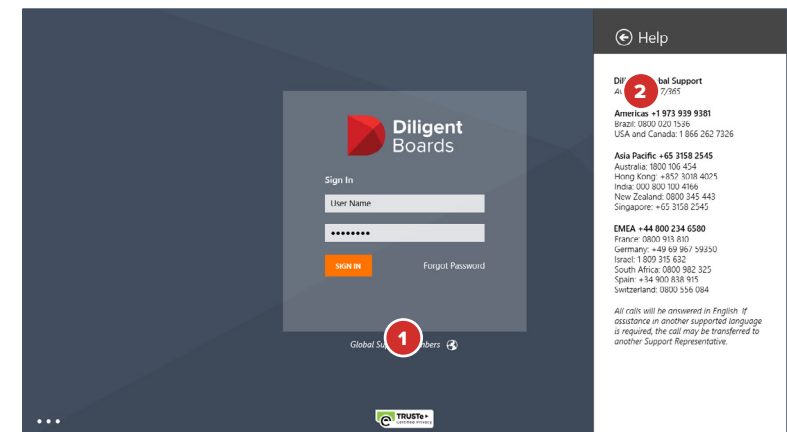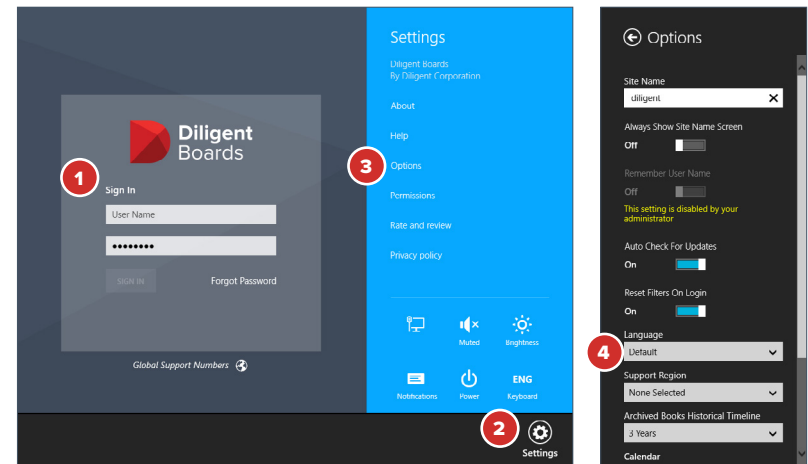
Diligent Global 24/7 Support

Americas +1 973 939 9381	Israel 1809 315 632
Asia Pacific +65 3158 2545	Malaysia +60 3 9212 1715
Australia 1800 106 454	Mexico 1 800 681 1528
Brazil 0800 020 1536	New Zealand 0800 345 443
Chile +56 442050261	Peru +51 170 71517
China +86 21 5157 8073	Philippines +63 2640 6859
Europe, Middle East and Africa +44 800 234 6580	Singapore +65 3158 2545
France 0800 913 810	South Africa 0800 982 325
Germany +49 69 967 59350	Spain +34 900 838 915
Hong Kong +852 3018 4025	Switzerland 0800 556 084
India 000 800 100 4166	United States and Canada +1 866 262 7326

Diligent Global Headquarters

1385 Broadway, 19th Floor
New York, NY 10018
Phone: + 1 212 741 8181

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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