Diligent Boards OneClick

***QUICKSTART** Guide v3.8.0*

Contents

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Installing and Starting Diligent Boards

1 Open Internet Explorer and type the following web address into the top bar:

https://go.boardbooks.com/utoronto

2 On the web page that appears, under **My Computer**, click **Login**. OneClick will install on your computer and open automatically.

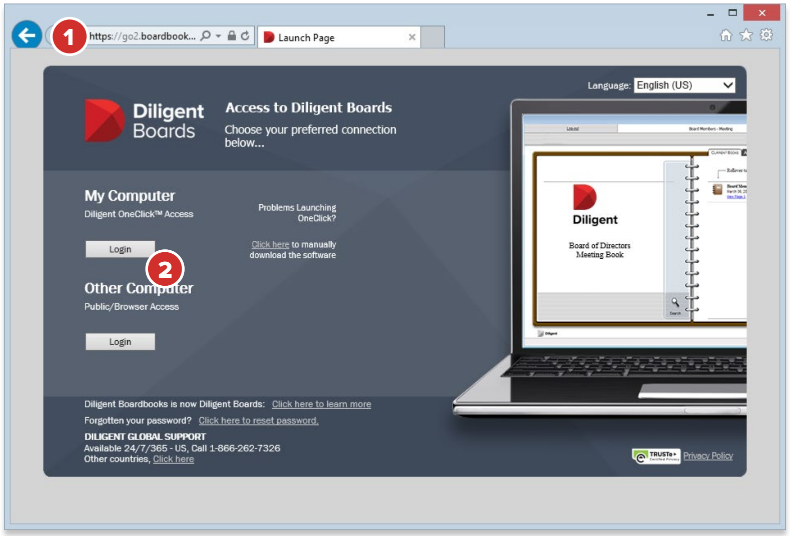
3 When the login screen appears, enter your username and case-sensitive password. Click **Login**.

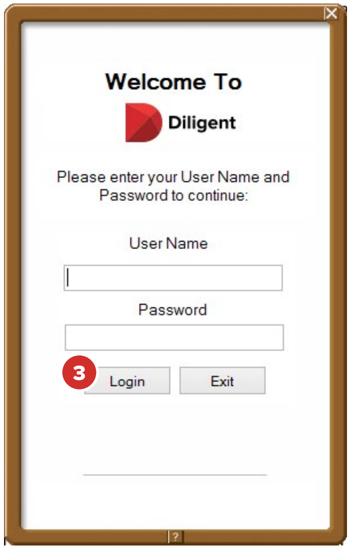
Note: *During your first login, a progress window will briefly appear as the application finishes installing. When the installation is complete, you will be taken to your board's home page.*

4 If you sit on multiple boards, you may see a small OneClick window upon login. Click the drop-down menu in this window and select the board you want to access and click **Launch**.

5 To open OneClick in the future, click the **Start Button** in the lower left-hand corner of the screen. In the menu that appears, click All Programs, then **Diligent Boards**, and **Diligent OneClick**.

Note: *If installation is not successful, use the "Click Here" link under "Problems Launching OneClick?" on the installation web page. This will download an alternative OneClick installer.*





Selecting and Managing Books

The Home Page displays all of your board's meeting books. From here you can select a book to read, or switch between current and archived board materials.

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

2 Click on a book to open a window containing that book's details. You will be able to read the book by choosing a section in this window.

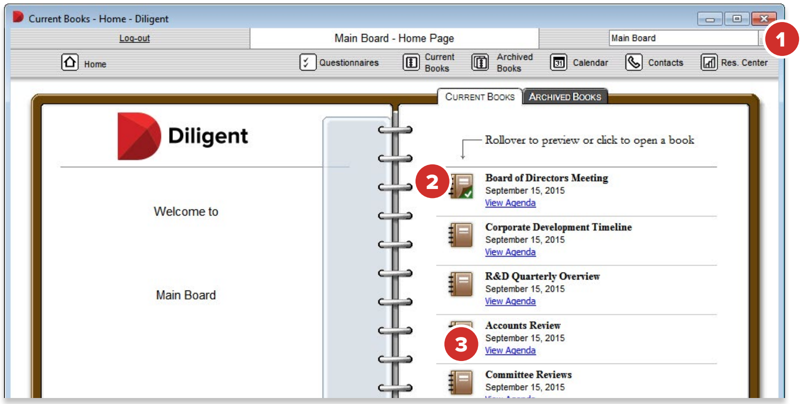
3 Click on **View Agenda** to go directly to the book's agenda page.

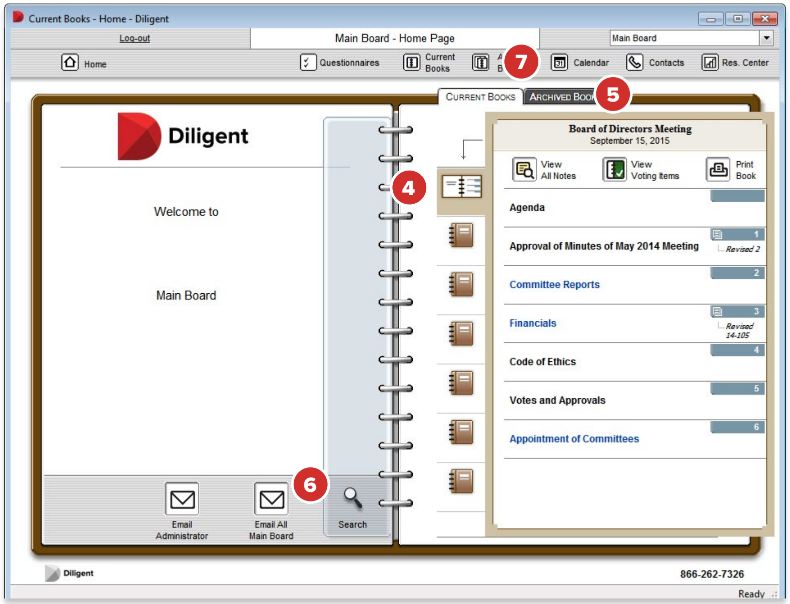
4 Hold your mouse over a book's icon, without clicking, to open an outline of the book. From here you can click any section in the outline to go directly to that section's first page.

5 Books from previous meetings are available to view by clicking the **Archived Books** tab.

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

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





Navigating and Annotating a Book

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

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

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

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

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

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

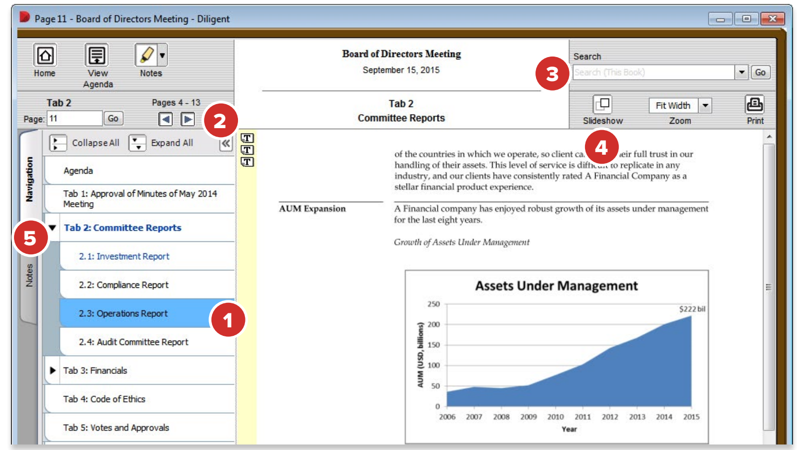
6 Select **Page Notes** to see all the notes on the current page. Select **All Notes** to see all of the notes in the book.

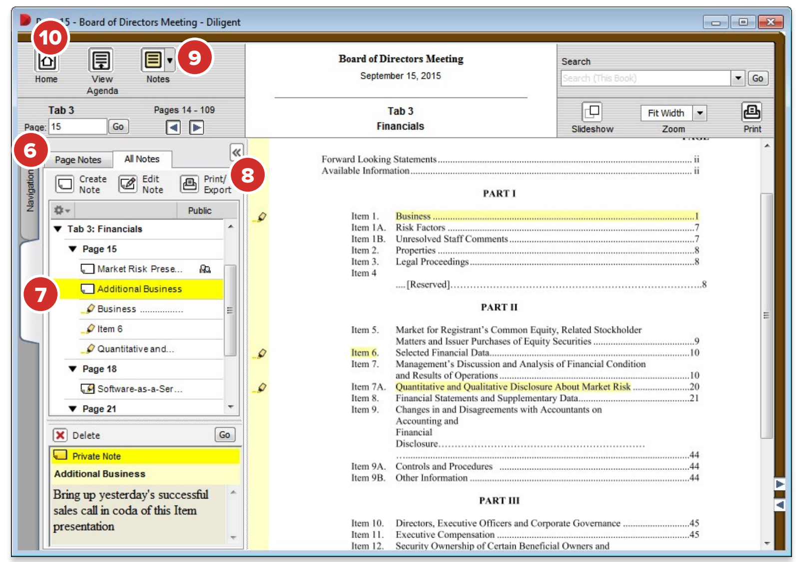
7 Click a note in the list to see the content of the note. Double-click a note to go to the page the note is on.

8 Click **Create Note** to write a new note on the page. Click a note in the list and click **Edit Note** to rewrite that note. Click **Print/Export** to print the notes, or to save them as a PDF.

9 To highlight text, click the **Notes** drop-down menu and select **Switch Highlighter On**. Select any text in the book to highlight it for easy access from the list of notes.

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

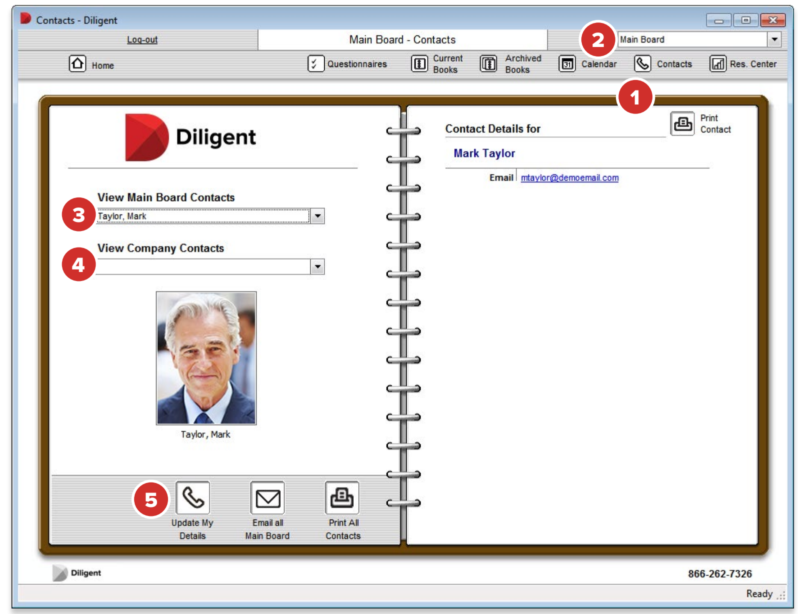




Contacts

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

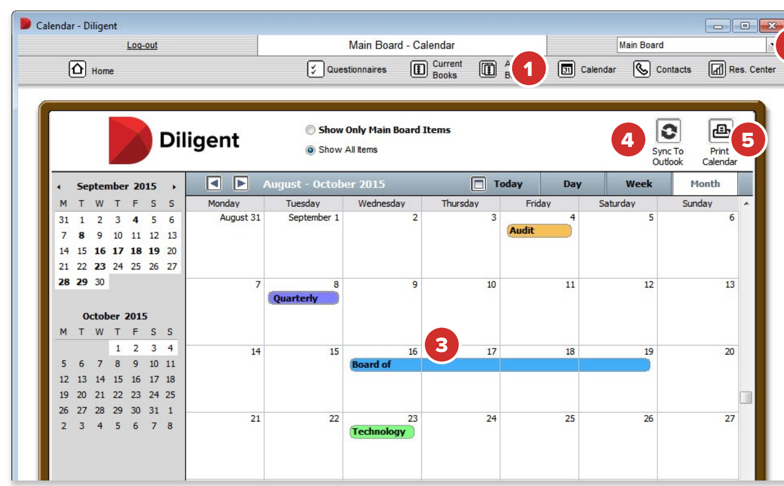
1. Click the **Contacts** icon to open the contacts section.
2. Select the board or committee whose contacts you want to view from the drop-down menu in the upper right-hand corner.
3. To view a board member's contact information, select their name from the **View Main Board Contacts** menu.
4. To view an affiliated non-board member's contact information, select their name from the **View Company Contacts** menu.
5. Click **Update My Details** to edit your own contact information.



Calendar

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

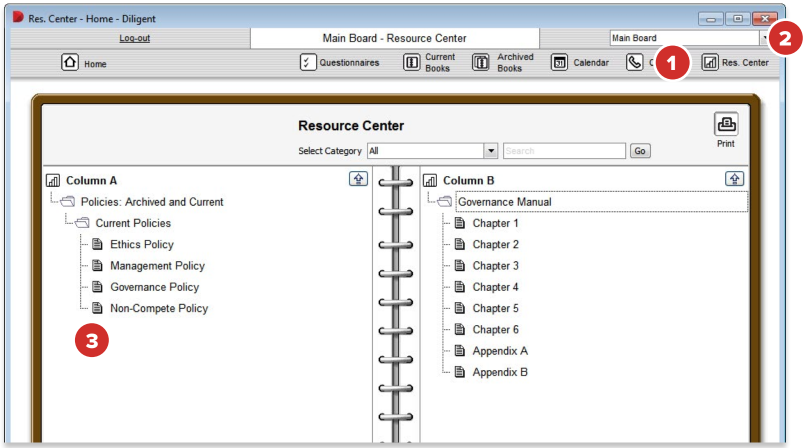
1. Click the **Calendar** icon to open the calendar section.
2. Select the board or committee whose calendar you want to view from the drop-down menu in the upper right-hand corner.
3. Hold your mouse over an event, without clicking, to reveal the event's summary. Double-click the event to open a window containing more detailed information.
4. Click **Sync To Outlook** to sync the board events to your Outlook calendar.
5. To print a list of event information, click **Print Calendar.**



Resource Center

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

1. Click the **Res. Center** icon to open the Resource Center.
2. Select the board or committee whose Resource Center you want to view from the drop-down menu in the upper right-hand corner.
3. Click on a folder to view its contents. Click on any document in a folder to view that document.



Questionnaires

The Questionnaires section contains all of your board questionnaires and surveys, and lets you read and respond to the ones that require your attention.

1 Click the **Questionnaires** button in the header bar. A list of questionnaires will appear.

2 Choose a committee or group from the **Committee Menu** to display the questionnaires associated with that committee or group.

3 To begin or continue a questionnaire, click its **Start** or **Resume** link. The questionnaire page view will appear.

4 Questions will appear in a list. Questions may request answers in several different formats.

5 If a question has a **text field**, you should type your answer into that field. Some questions may limit what you can type into this field; for example, it might only accept numerical answers in a specific range, or an email address.

6 If a question has a **drop-down menu**, answers should be selected from the menu.

7 If a question has **radio buttons** or **check boxes**, one or more answers should be selected from the presented list.

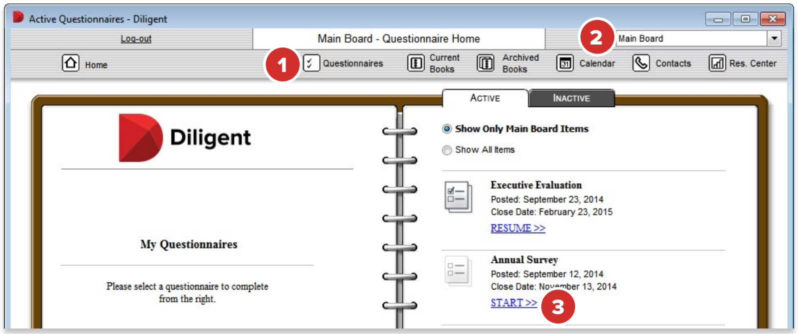
8 **Required questions** will be marked with an asterisk. You must answer these questions before moving to the next page or submitting your questionnaire.

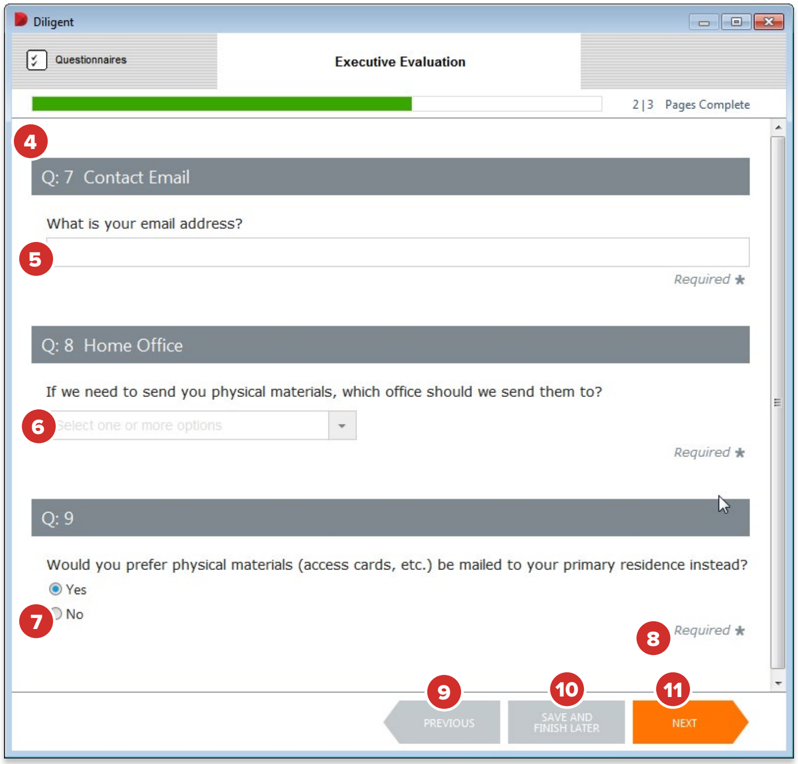
9 Click the **Previous** button to go to the last page of the questionnaire.

10 To record your current answers and continue the questionnaire later, click the **Save and Finish Later** button.

11 Click the **Next** button to go to the next page of the questionnaire. On the last page of the questionnaire, the Next button becomes a **Submit** button; click this to complete the questionnaire. You cannot change any of your responses after submitting.

***Note:** You do not have to click "Next" to save your current progress. Your responses are automatically saved after each question is answered, or if an answer is updated.*






Week
Month
Saturday
Sunday
Quarterly
Audit
Board of
Technology
Marketing
October 1
Calendar Time Zone:
Local Computer
866-262-7326
Ready

Diligent Boards Global 24/7 Support

Americas
+1 973 299 8300

Brazil
0800 020 1536

United States and Canada
1 866 262 7326

Asia Pacific
+65 3158 2545

Australia
1800 106 454

Hong Kong
+852 3018 4025

India
000 800 100 4166

New Zealand
0800 345 443

Singapore
+65 3158 2545

Europe, Middle East and Africa
+44 800 234 6580

France
0800 913810

Germany
+49 69 967 59350

Israel
1 809 315632

South Africa
0800 982 325

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 Boards 24/7 support for your region.

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

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