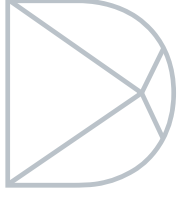
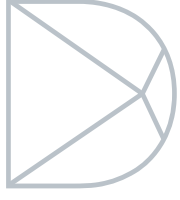
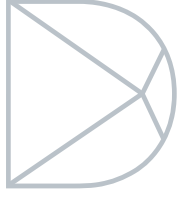
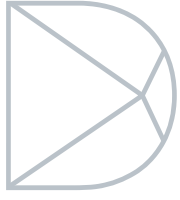
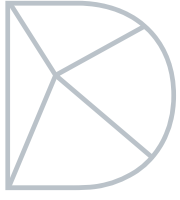
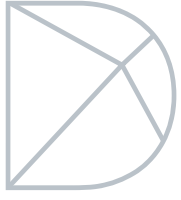
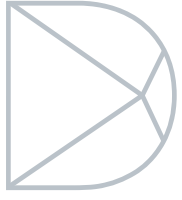
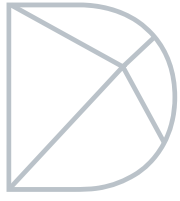
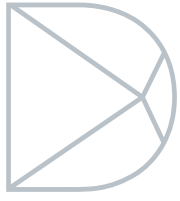
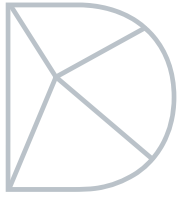
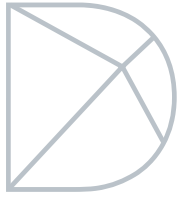
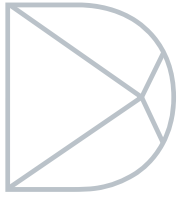
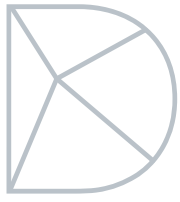
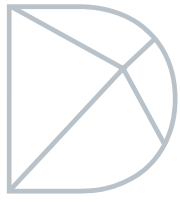
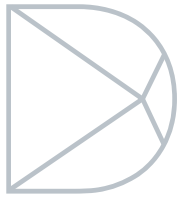
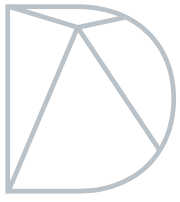
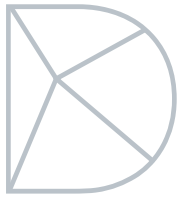
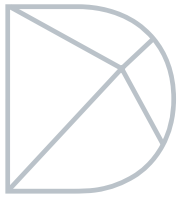


# Diligent Boards for iOS – iPad

QUICKSTART Guide v4.0.0





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*QUICKSTART Guide v4.0.0*

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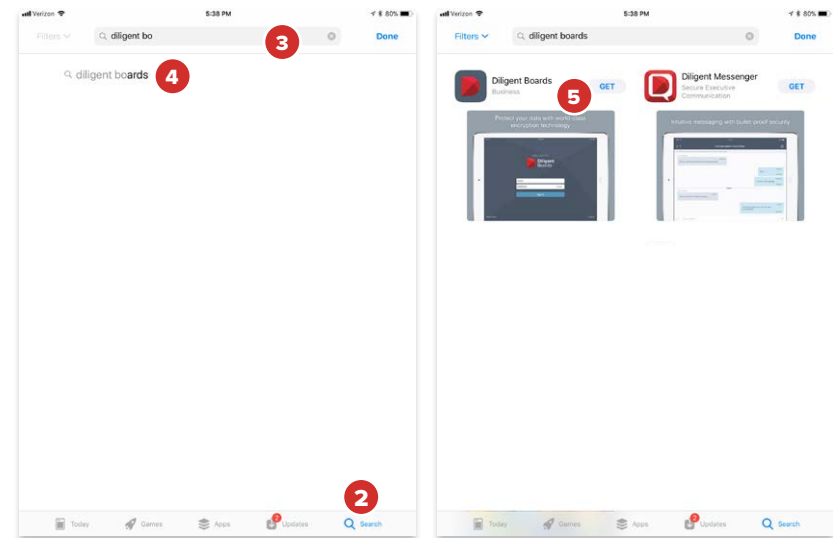
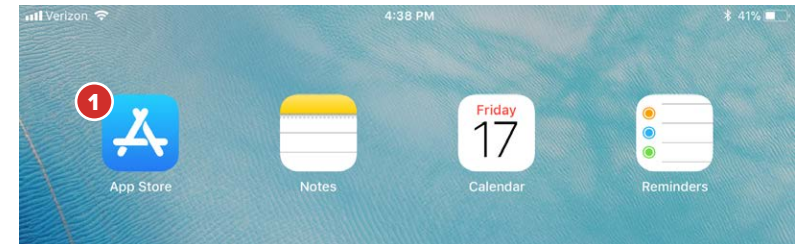
# Installing and Opening the iPad App

- 1 Tap the **App Store** icon on your iPad's Home Screen.
- 2 Tap **Search**.
- 3 In the Search field, enter the keywords **Diligent Boards**.
- 4 A list of results will automatically appear. Tap **Diligent Boards** when it appears in this list.
- 5 Tap the **Get** button for the Diligent Boards app. You may then be prompted to tap Install to proceed.

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

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

- 6 After installation, the **Diligent Boards** App icon will appear. Tap this icon to open the iPad App.



# Installing and Opening the iPad App - Continued

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

Tap **Continue** to proceed to the Sign In screen.

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

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

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

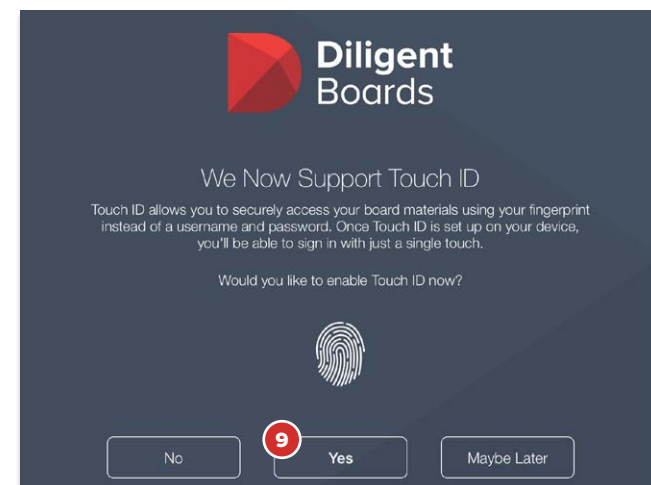
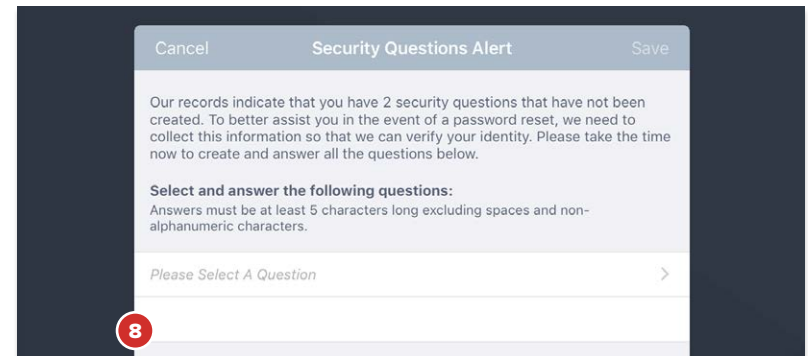
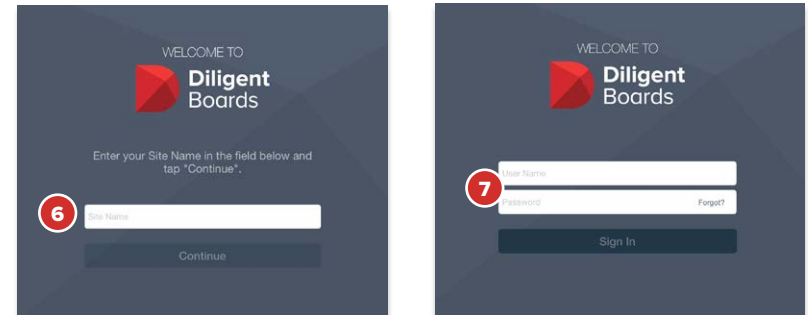
**Note:** Security questions are used for identification purposes, and are required in the event of a password reset.

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

- 9** If Touch ID has been enabled for your site and your iPad is compatible with Touch ID, you will be prompted to activate Touch ID for Diligent Boards upon signing in. To use Touch ID, choose **Yes** when prompted and follow the on-screen instructions to confirm your Touch ID. Upon successful completion, you will be prompted to sign in via Touch ID for future sessions.

**Note:** Touch ID must be enabled by your Customer Success Manager.

**Note:** For security purposes, Touch ID is not recommended for use on shared devices. Your Diligent Boards credentials will be associated with all Touch ID fingerprints stored on your device, and other device users will be able to access your Diligent Boards materials with their own Touch IDs. If you are on multiple boards, Touch ID must be enabled for every board in order to be available to you as an option.



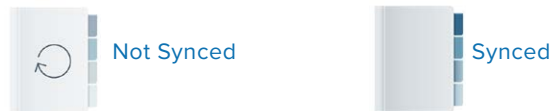
# Selecting and Managing Books

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

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

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

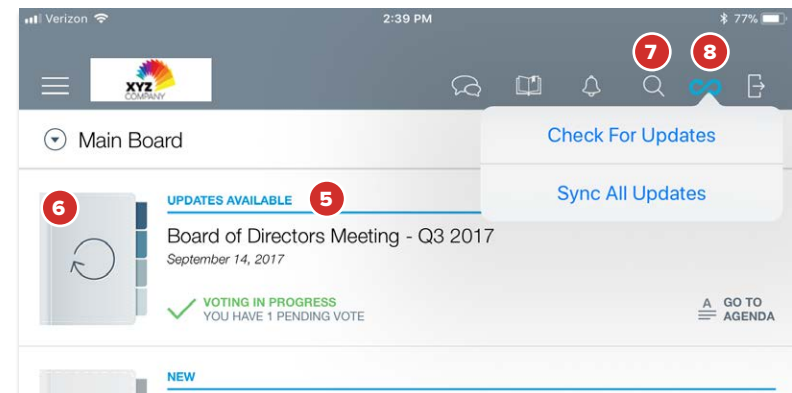
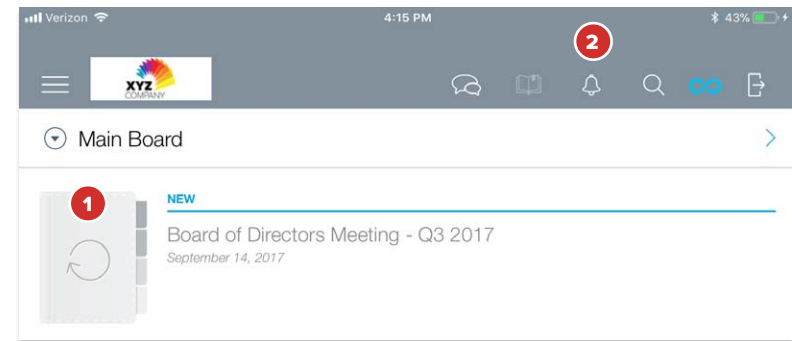
Tap a book icon to download that book to your iPad. Books that have never been synced are grayed out and must be synced to be viewed.



- 2 If your administrator has created an alert message, it will pop up when you sign in. To make it reappear at any time, tap the **Bell** icon.
- 3 Tap any book's icon to begin reading it. You can read a book while it syncs in the background.
- 4 Tap **Go To Agenda** to go directly to that book's agenda page.
- 5 Diligent Boards for iPad will automatically check for updated versions of your books when you sign in. If a book is new or has been newly updated, the line above the book title will let you know.
- 6 Tap the **Book** icon to download these changes.

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

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





# Reading and Navigating a Book

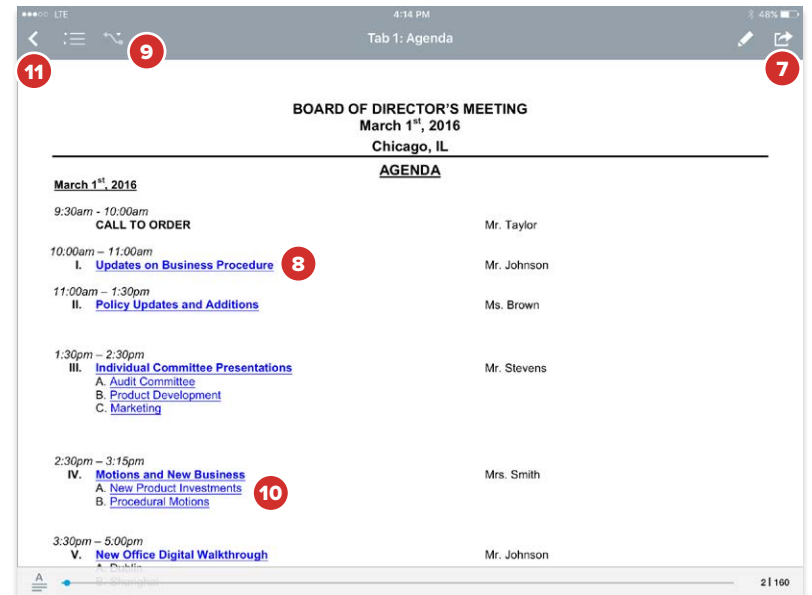
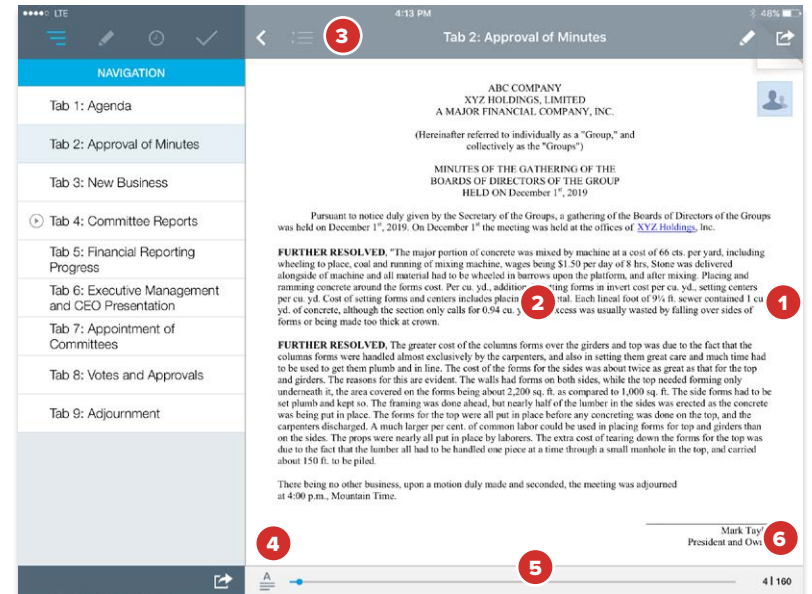
The page view displays all your book content and includes features for an optimal book reading and navigation experience. To get to the page view, tap any book in the bookshelf list view.

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

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

**Note:** *If watermarking is enabled for your site, a watermark with your name and the time of export will appear on each printed or emailed page.*

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



# Creating Annotations

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

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

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

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

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

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

4 Tap the **Erase** button, then tap any pen or highlighter mark to erase it. This action cannot be undone.

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

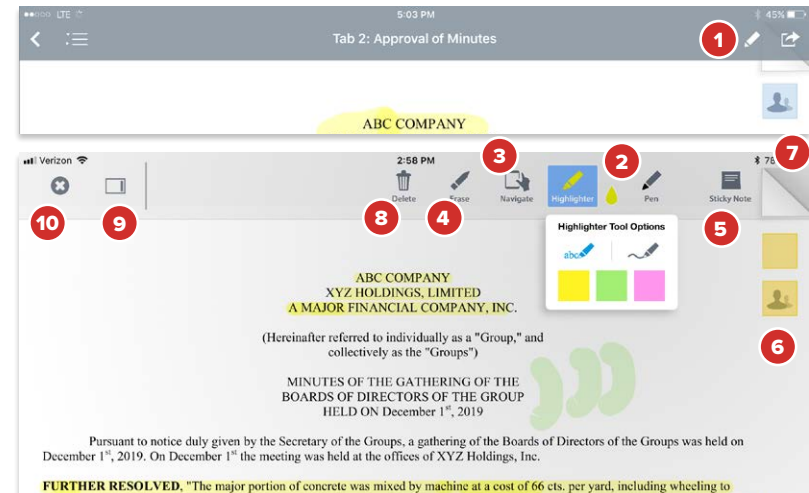
6 Saved sticky notes appear in the upper-right-hand corner. Tap on a sticky note icon to view or edit it. Press and hold a sticky note icon to move it to another location on the page.

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

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

9 Tap the **Location** icon to shift the markup toolbar to the right side of the screen, allowing you to make markups on the topmost area of the page. Tap the same icon to shift the toolbar back to its original location.

10 Tap the **X** to exit out of Markup Mode.





# Contacts

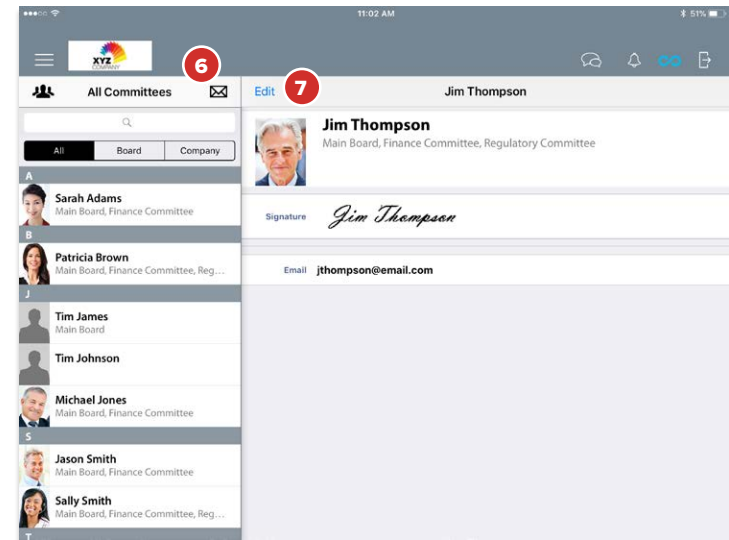
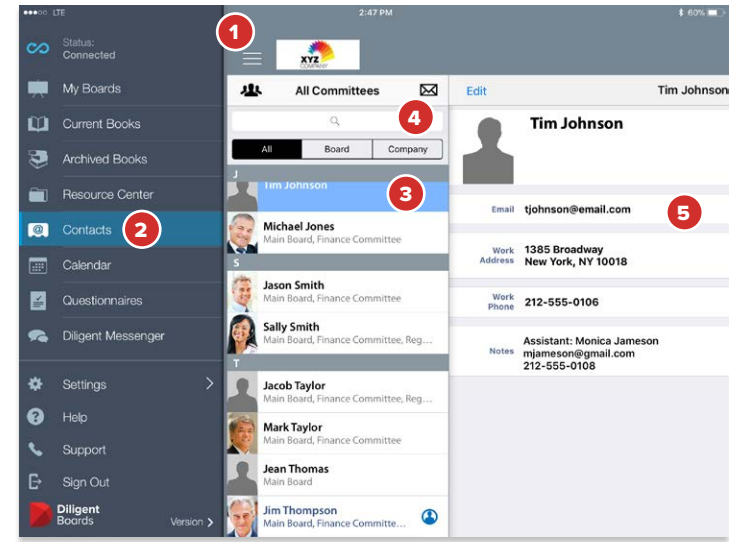
The Contacts section contains a list of all of your board contacts.

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

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

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

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

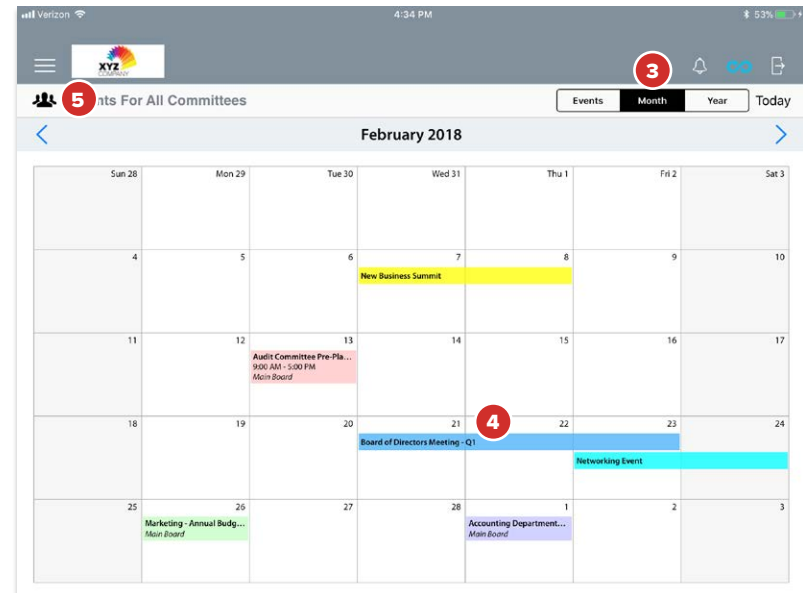
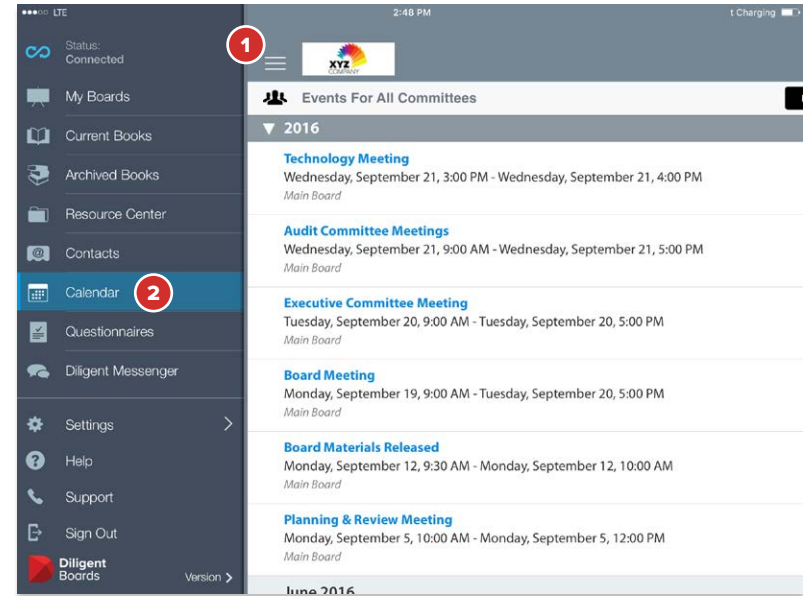


# Calendar

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

- 1 Tap the **Section Menu** button to open the section menu.
- 2 Tap the **Calendar** button. The section menu will close, and a list of events will be displayed.
- 3 Tap **Month, Year or Events** to change how your calendar items are displayed.
- 4 While in the Event or Month view, tap any event to get detailed information about that event.
- 5 Tap the **Meeting Group Filter** icon to view only events specific to a board or committee.

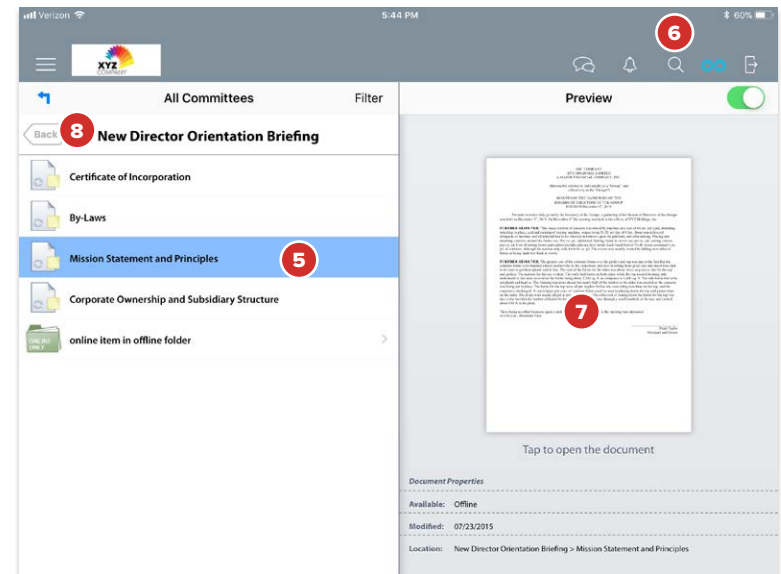
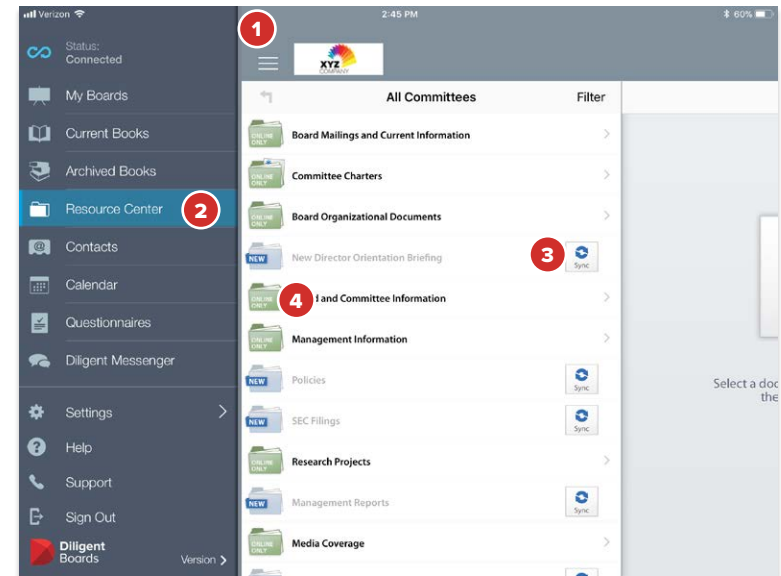
*Note: Times in the calendar are synced to the iPad's clock, and will update automatically when you travel to different time zones.*



# Resource Center

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

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

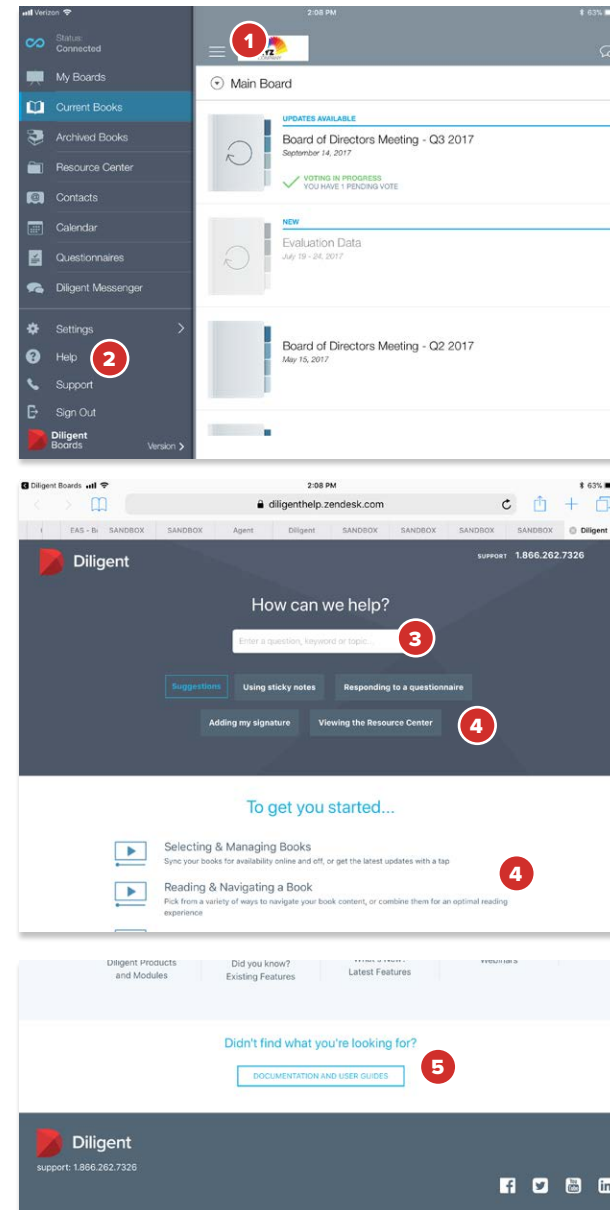


# Online Help

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

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

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



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

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

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