



DILITRUST

DiliTrust Exec
Administrator Guide —

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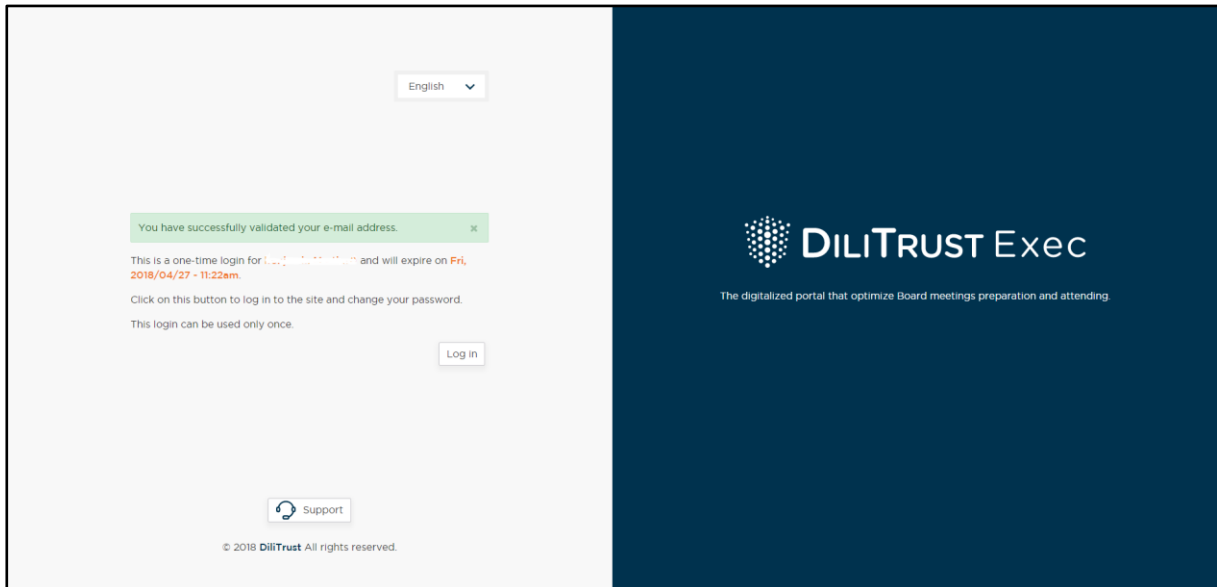
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1. PRESENTATION

1.1. First login

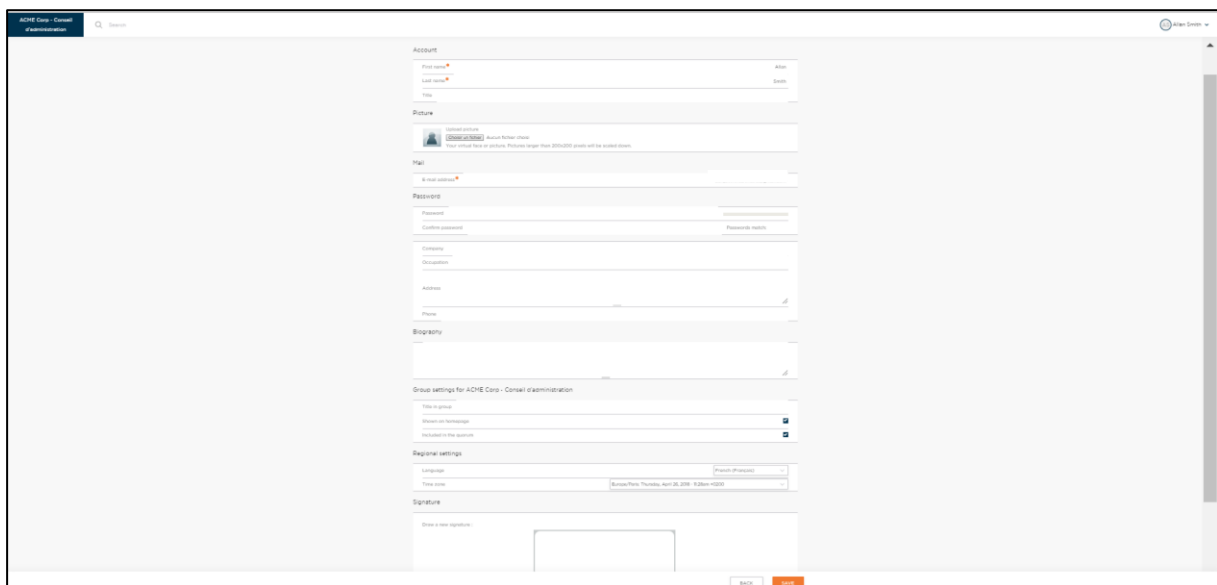
For your first login click on the link received by email to confirm your email address and access the portal. After accessing the link in your web browser click on « Login ».



Complete your account by choosing a secure password respecting the following conditions:

- At least 10 characters long,
- At least one lowercase character,
- At least one uppercase character,
- At least one number or special character

Click « Save » and you have now access to the portal.



NB: For future logins, use the email address and password you chose when creating your account.

1.2. Access to the portal

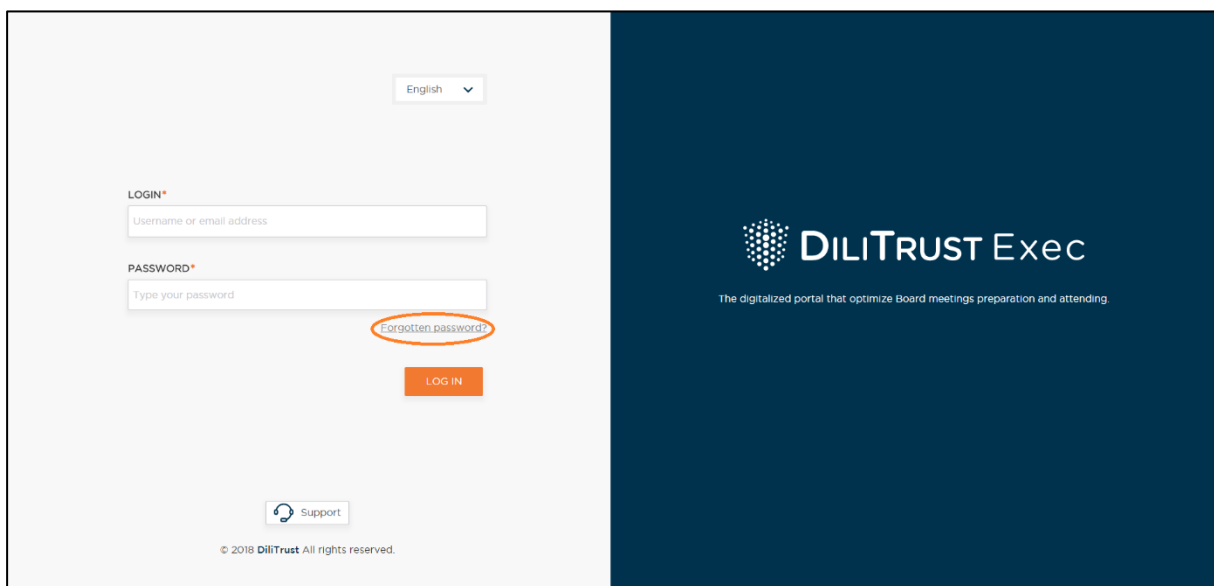
You can access the portal through:

- The DiliTrust website www.dilitrust.com, by clicking on « Client Access » (top right) and choose the portal according to your location,
- The following link:
 - o North America: <https://exec-na.dilitrust.com>
 - o Europe : <https://exec-eu.dilitrust.com>
 - o MEA: <https://exec-mea.dilitrust.com>
 - o Morocco: <https://exec-ma.dilitrust.com>

1.3. Forgotten password

If you forgot your password, we invite you to select the « Forgotten password » link on the portal. Enter your email address and you will be sent an email containing a one-time link valid only 24 hours to reset it.

NB: If you don't receive an email, check your spam folder and if your email address was spelled correctly.



English

LOGIN*

Username or email address

PASSWORD*


Type your password

[forgotten password?](#)

LOG IN

Support

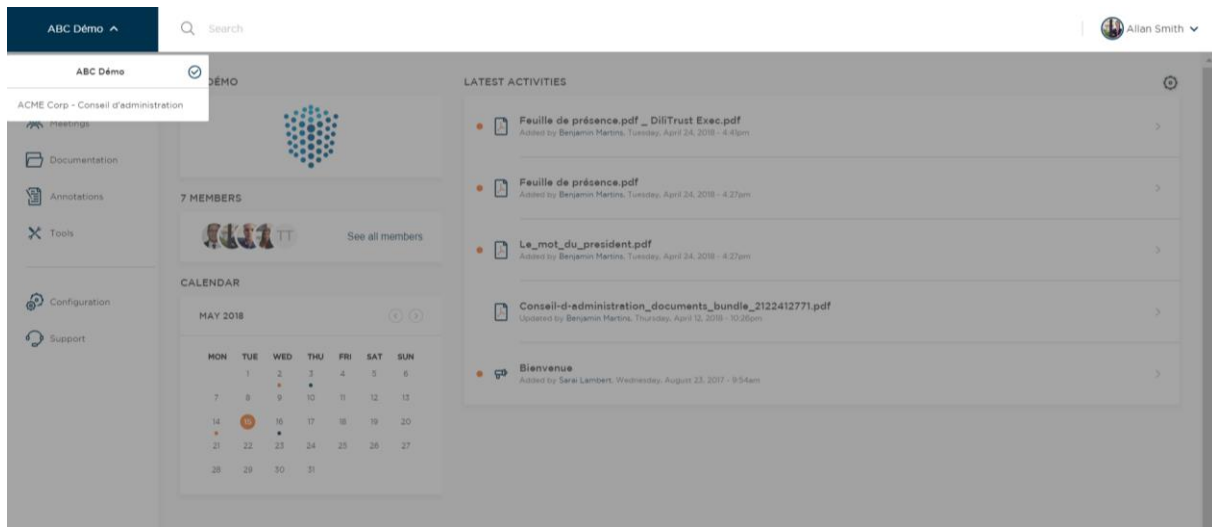
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 DILITRUST Exec

The digitalized portal that optimize Board meetings preparation and attending.

1.4. My groups

The group name you have access to is indicated on the top left of the screen in the blue square.



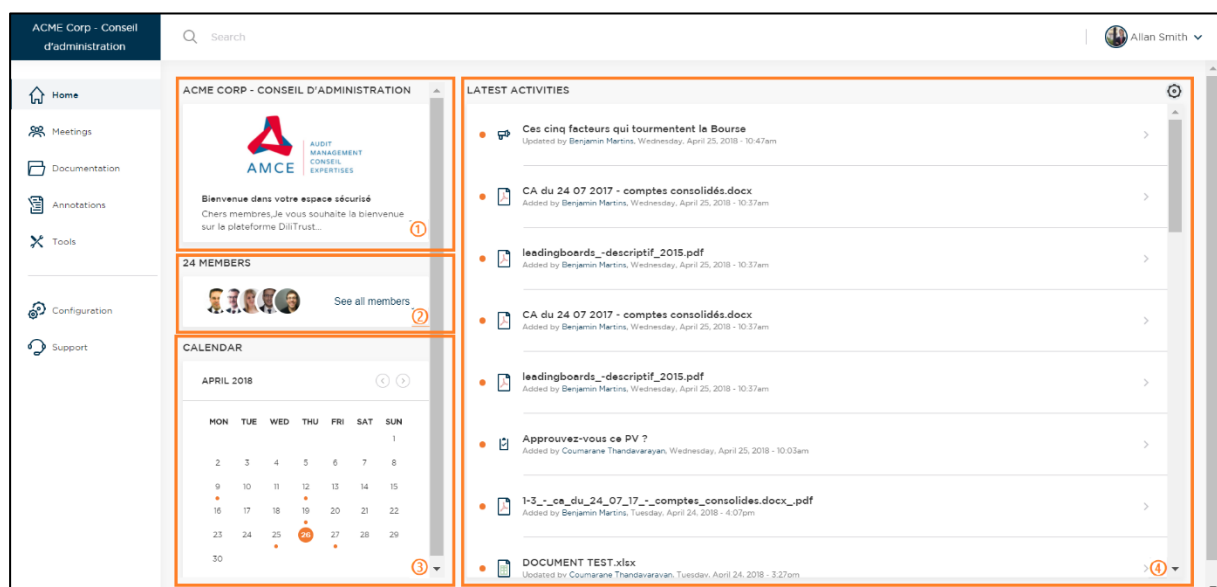
If you have access to several groups an arrow will be displayed on the group's name right. You can switch group by clicking on its name.

NB: You can have user rights in a group and be administrator in another. To be certain to have access to all the groups you are member of, be sure that the group administrators add you with the same email address you already use in another group.

1.5. Home

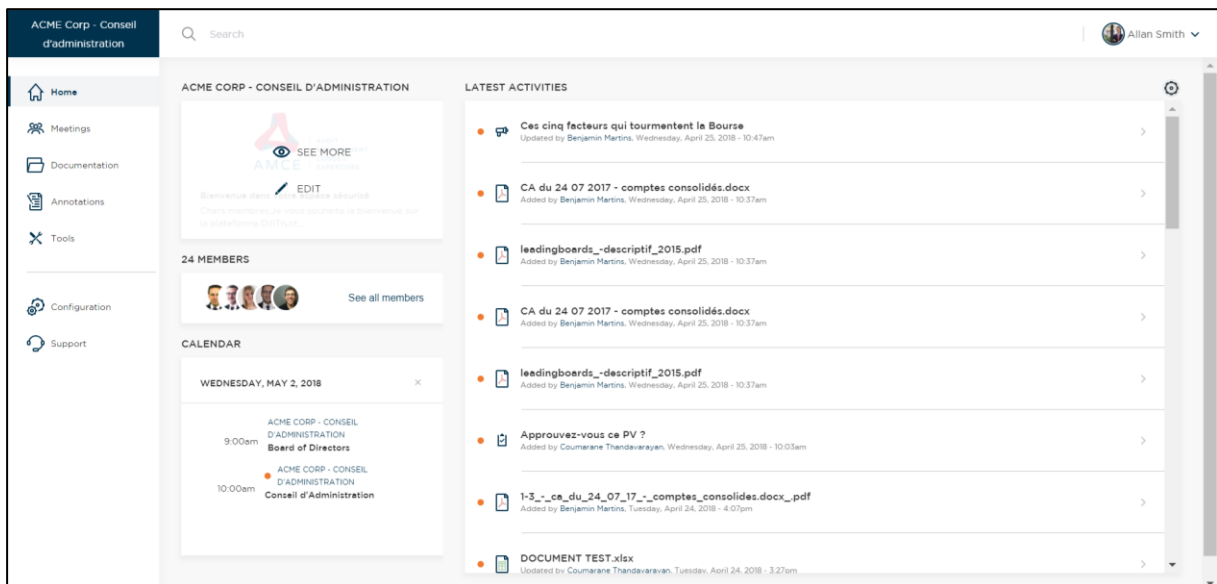
On the home page, you can see 4 sections:

- ① : The logo and Welcome Message
- ② : The members displayed on the home page
- ③ : The calendar and different meetings
- ④ : The latest activities (documents, polls, votes...).

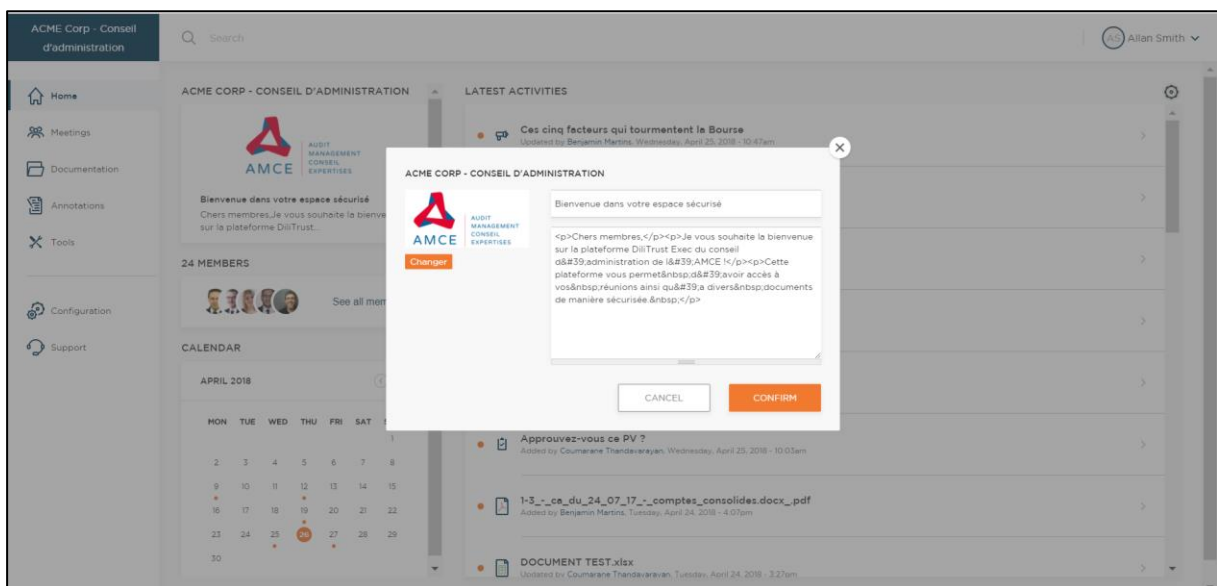


1.5.1. Logo and welcome message

To change the logo or the welcome message, hover over the logo's section and select the « Edit » button.

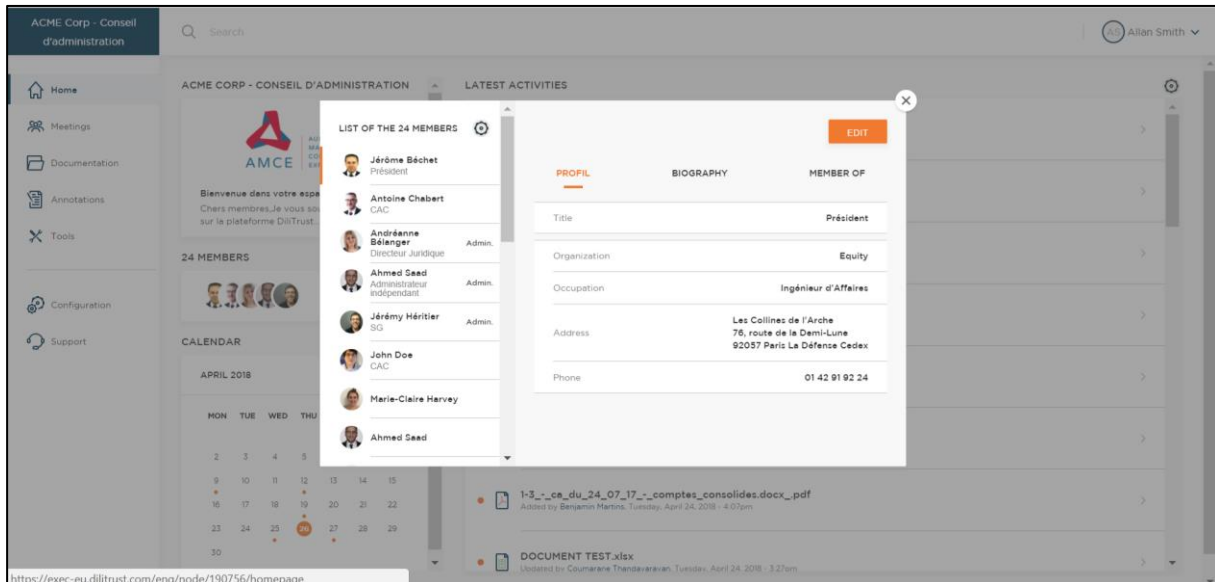


You can edit the message title, write or modify the message or change the logo by clicking on the button « Change ». Then click « Confirm » to save your changes.



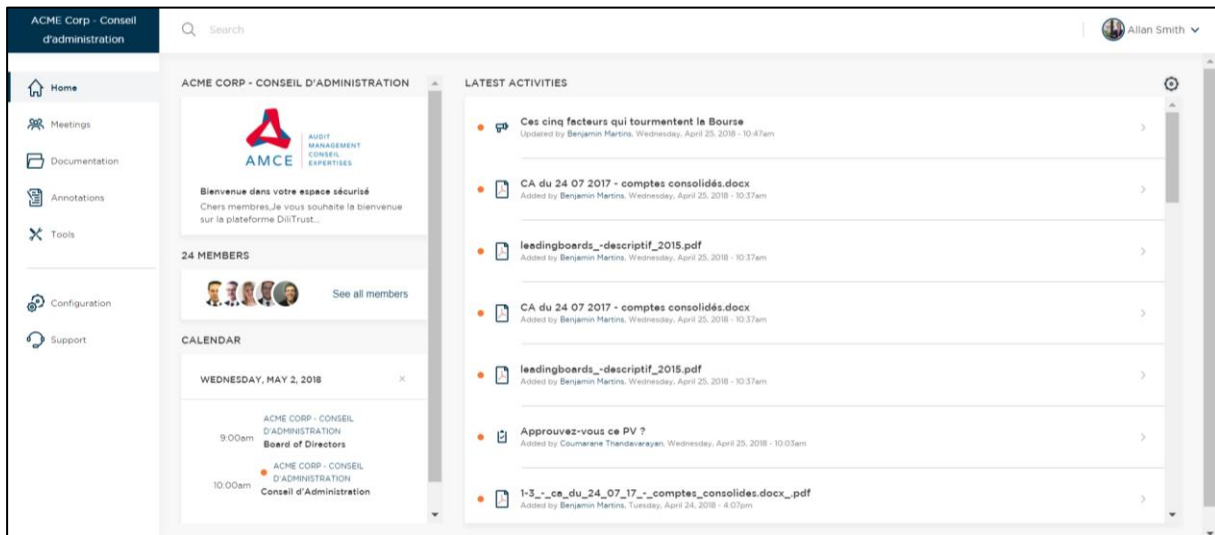
1.5.2. Members

Members on the homepage are the people who have been chosen by the administrator(s) to be highlighted on this page.



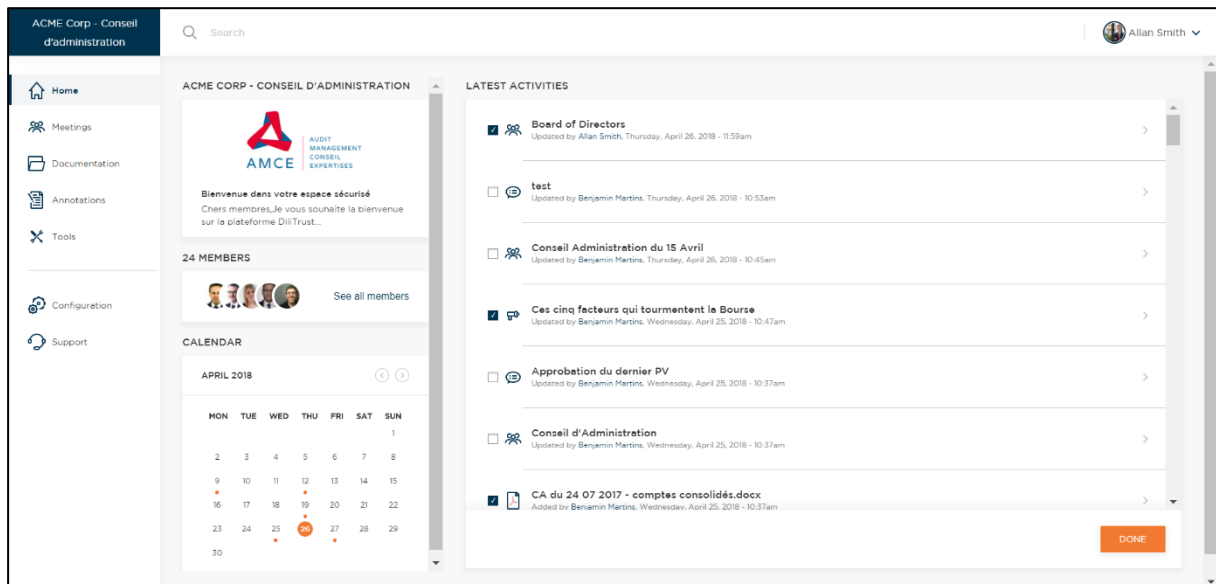
1.5.3. Calendar

The calendar regroups all the meetings from all groups you are a member of. If you have a meeting scheduled, it will be identified by a small point under the date. The meetings that have not been consulted yet will be identified in orange and those already consulted in blue. The current date is circled in orange.



1.5.4. Latest activities

In the latest activities section of the home page are listed all the recently uploaded documents in meetings, in the documentation, the votes, surveys, announcements and meetings published. The wheel allows group administrators to choose which documents should appear in this latest activity list to their users. You simply have to click on the wheel icon, select the items you want to display (tick) and click on « Done » to save your changes.

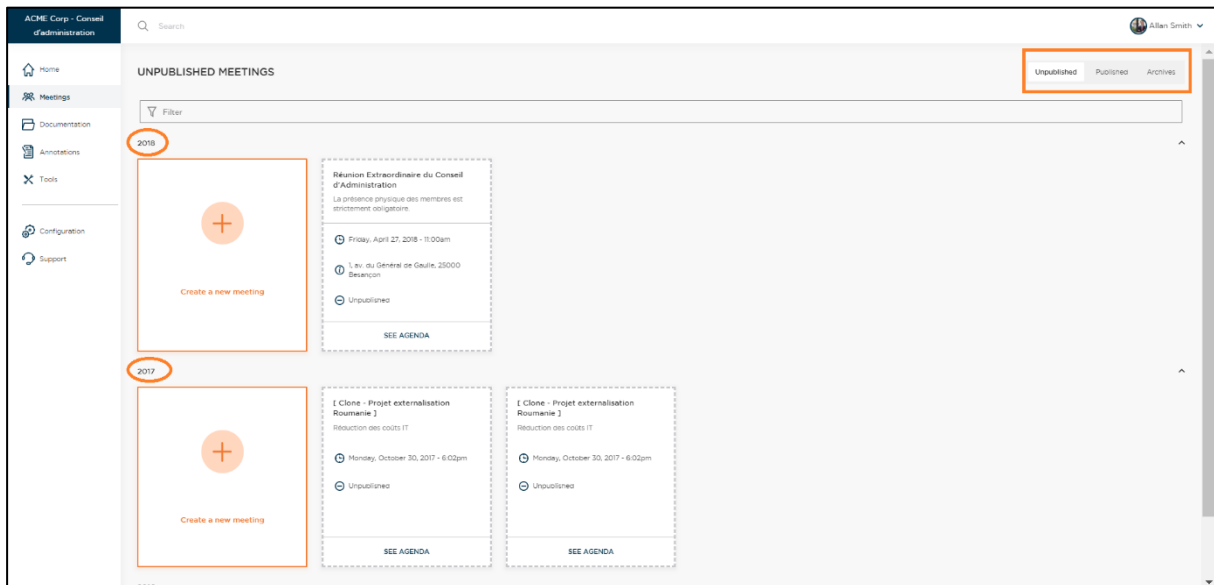


2. MEETINGS

The meetings tab will allow administrators to create, delete, archive or unpublish meetings. This section consists of three tabs:

- Unpublished meetings
- Published meetings
- Archived meetings

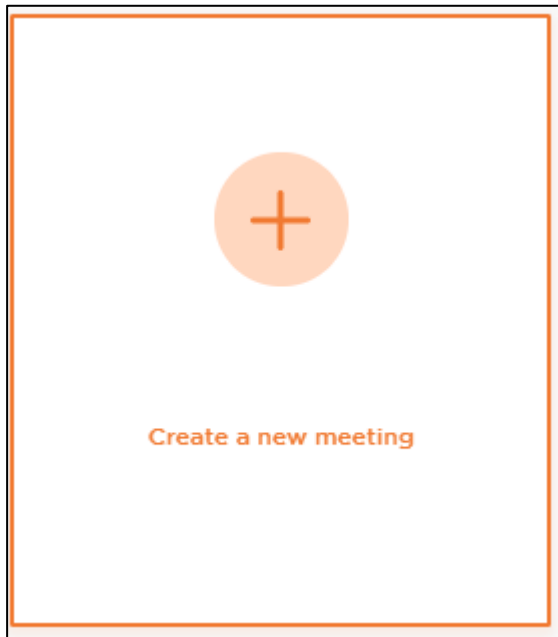
Meetings are sorted by year. The unpublished meetings are distinguishable by dotted lines in the « Unpublished tab ». The published meetings are presented without dotted lines in the « Published » tab. Meetings are archived in the « Archives » tab.



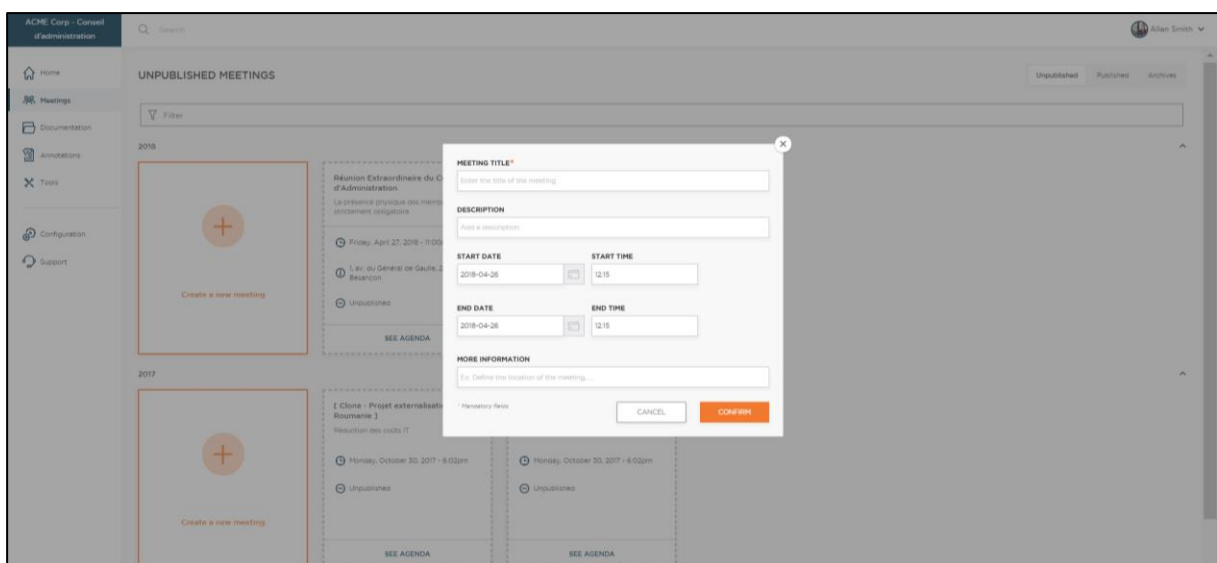
2.1. Unpublished meetings

2.1.1. Create a meeting



To create a meeting click on « Create a meeting » in the Unpublished tab only.




A window will open to fill in the meetings information. After adding the title, it is possible to add information in the description field such as: the address or the meeting room. To add the date, click on the calendar icon and select the desired date. In terms of the hour, simply type in the desired hours. If you want to add more details, it is possible to add it in the "More information" field.



It's now possible to create you meeting agenda.


Create the different points of the agenda by clicking on  and by typing titles. If you want to create a sub-point, follow the main point and click on the . The numbering is automatic, you can have it removed by writing to our Support Team.



To add a document in your agenda, follow the point you want to add it to and click on the  button. You can click on documents and access to your computer files or just drag and drop all your documents at the same time. To do this, simply select the files in your computer and drag them in the box. When the box turns orange, release your mouse and you will see that they were added to the portal.


Allowed document types are:


- Word
- Excel
- PDF
- PowerPoint


Note that you can add an unlimited number of documents, but that their individual size may not exceed 15 MB.

To reorganize the documents, points, sub-points in your agenda, you can use the drag and drop option:  and place the item where wanted.


To create a survey, click on the  icon and type its title. Once created the  will allow you to indicate the duration of the survey and user's permissions. You can add a second survey and indicate if an answer is required. After setting the survey save on the bottom right.


To close a survey, click on  to edit it and check the « Close the survey? » box then save.


The  icon lets you delete a survey section, a file, a survey, categories, sub categories of the agenda.


When adding documents to the agenda, actions will be available via the  button. Doing a mouse over it will let you set a survey, control access to documents allowing views, prints and downloads to the wanted users and see statistics on these documents.


After adding documents to the agenda, administrators will be able to manage them as described below:


 : you can vote a resolution by creating a vote and associating it with a document.


 : this button allows administrators to set user access rights on this document only (view, print, download, and watermark). You can add or remove access to this document to some users.

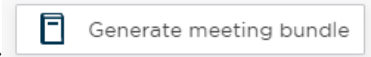
 : signature functionality allows users to sign document electronically.

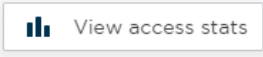
 : administrators can see all actions done by users (administrators included) on this document (creation, views, prints, downloads) with this button.

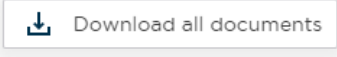
 : this button allows to download the document.

 : by clicking on this icon, you will be able to view the document.

The print button  will allow you to print the agenda including the documents title.

By clicking on « Generate meeting bundle » , a pdf file will be generated listing the plan and each documents of the agenda's points.

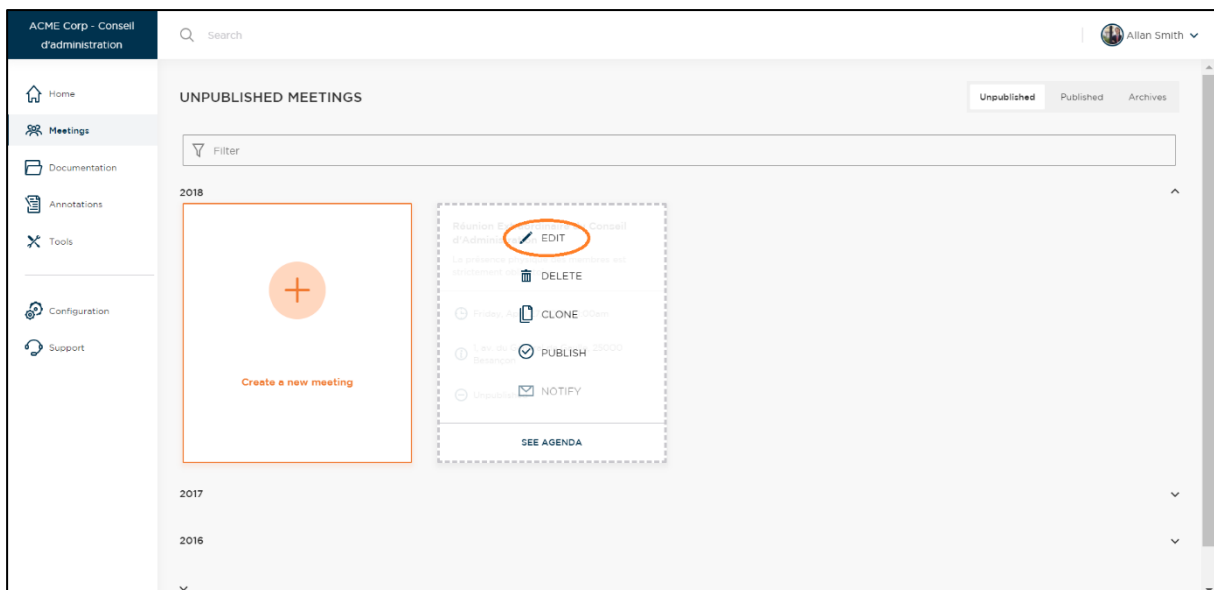
The « View access stats » button  allows administrators to see all actions (view, print, download, creation) done by all users (admin and users) of the group.

In order to download all the documents from a meeting or an archive, click on the « Download all documents » button  .

Once the meeting is created, a thumbnail with its name, description, meeting date, information and number of participants will appear in the unpublished meetings tab.

2.1.2. Edit a meeting

To edit a meeting, you will have to hover over its thumbnail and select « Edit » to do the desired changes.



For any editing changes on the title of the meeting, its description, points or documents, simply place your cursor under the column and you will see it becoming yellow. You can add "Title",

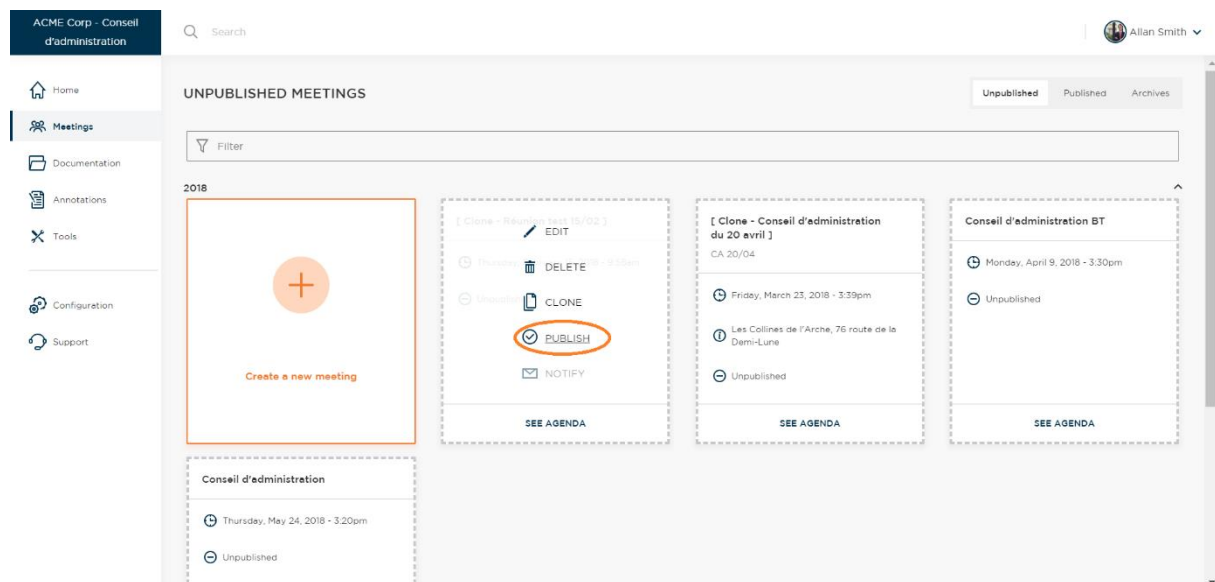
“Description” and “Time”. Once you’ve added the information, simply press on the “Enter” button (or click anywhere else on the page) and the changes will be saved.

Click « Done » to leave edit meeting menu.

2.1.1. Publish a meeting

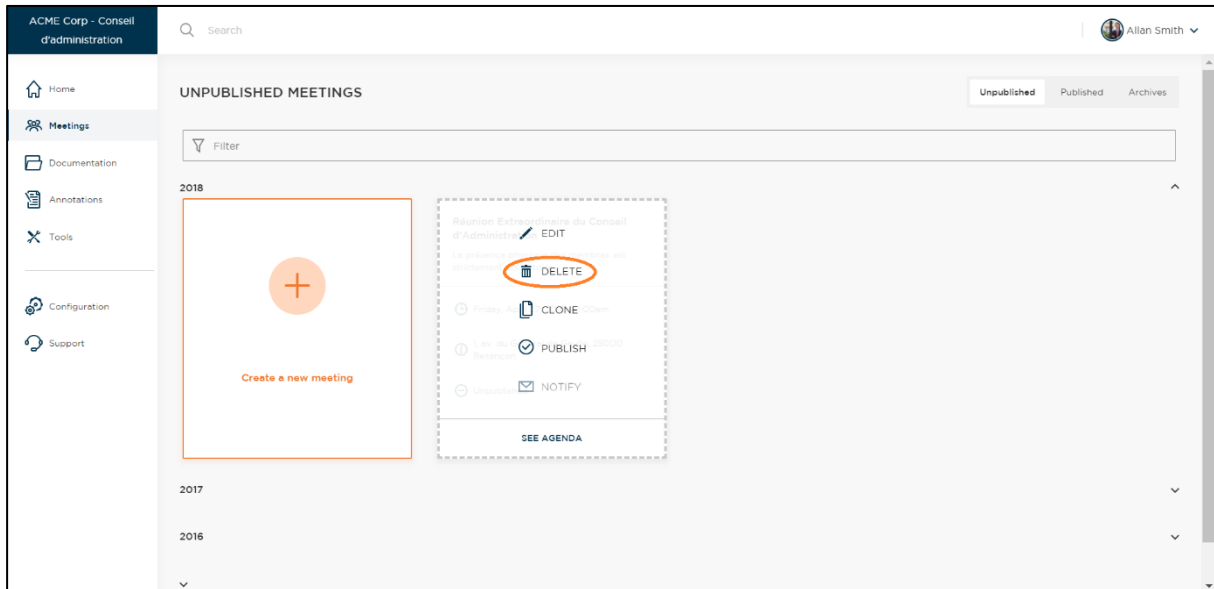
Publishing a meeting allows you to view this meeting in the calendar on the homepage and will be available to users only if the meeting is published. The documents will be available for consultation.

To post a meeting, hover over an unpublished meeting then click on 'Publish'. This meeting will be moved to the Published meeting tab. Publishing the meeting will not notify users, however if the user is online when the meeting is published he will be able to see it.



2.1.2. Delete a meeting

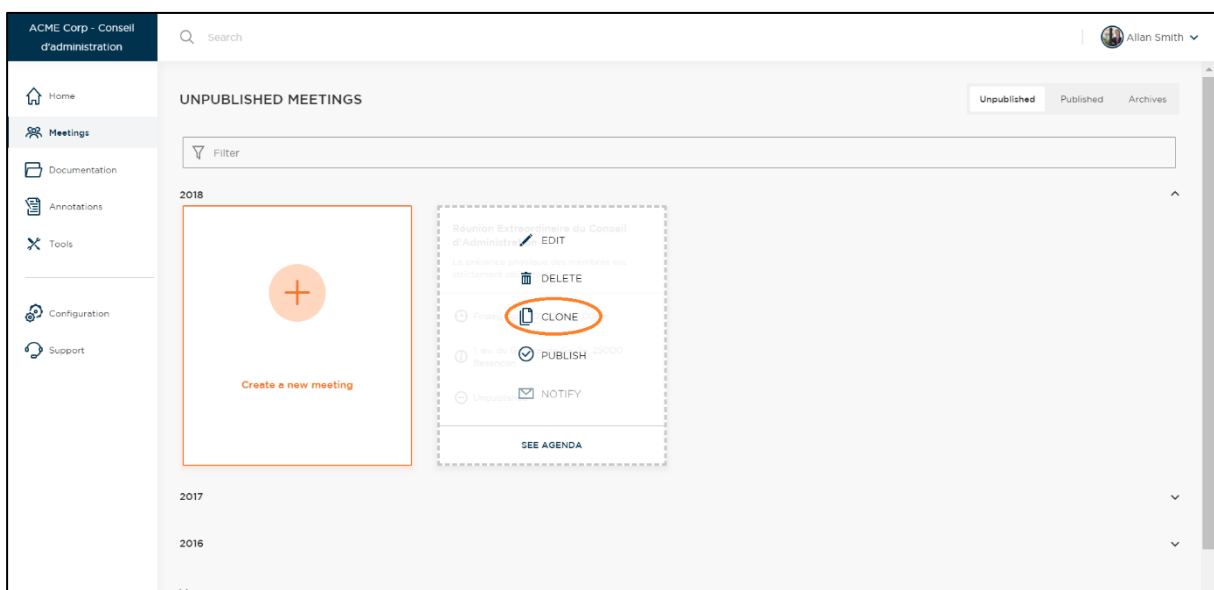
To delete a meeting, hover over the meeting and select « Delete », a confirmation will be required.



2.1.3. Clone a meeting

Cloning a meeting means you will clone the Title, its date, its time slot, its description and its agenda. By hovering over the meeting click on « Clone », a window will open asking if you want to clone this meeting in a different group or the actual group you are currently in. Check the « Clone meeting in another group » box if you want to do so then confirm. If you want to clone the meeting in the group you are working in, simply leave the box unchecked and confirm.

NB: The duplicate meeting does not include the documents from the original meeting.

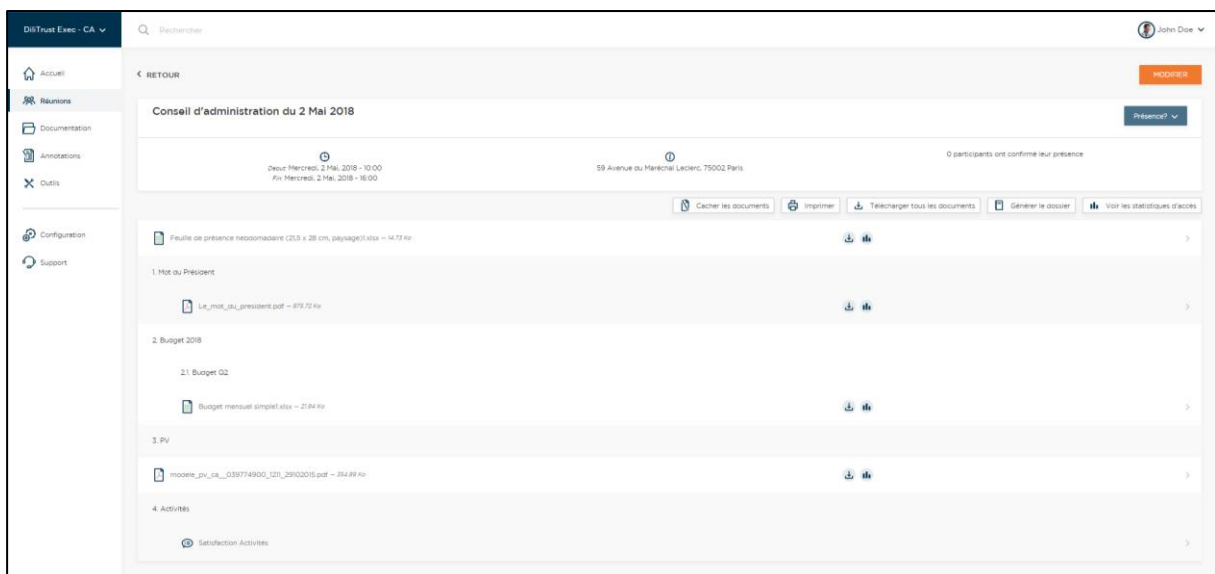


2.1. Published meetings

In this tab, you will find all published meetings that have taken place or the ones to come. You have the possibility to modify these meetings but we recommend notifying your users following the changes. You can edit, delete or clone a meeting from the Published meetings tab.

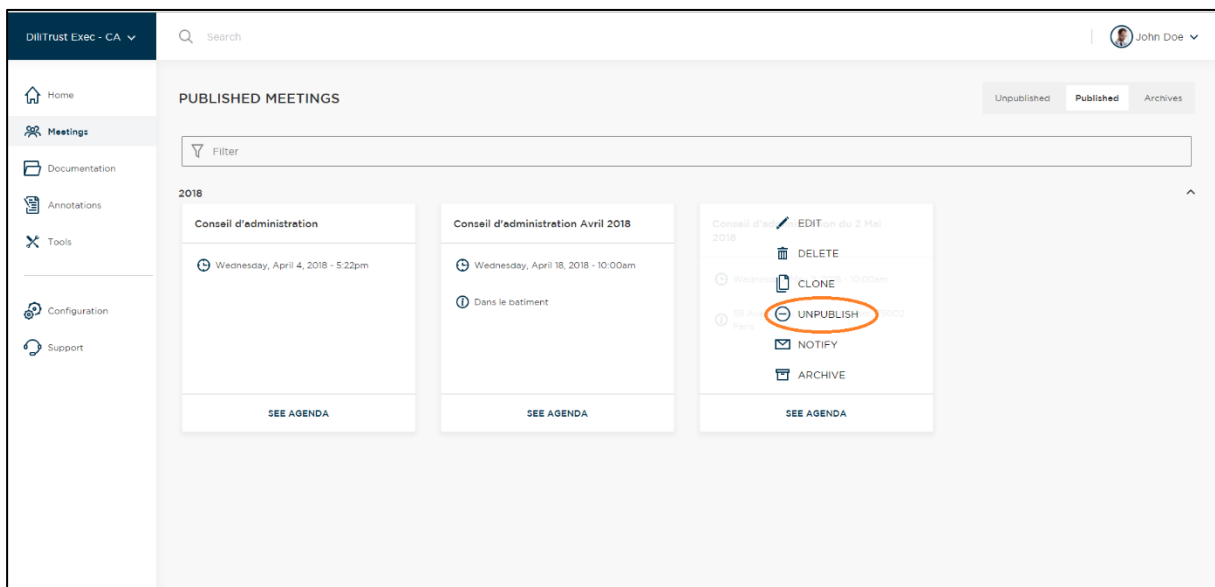
2.1.1. See agenda

By clicking « See agenda » on the meeting thumbnail you will access its agenda and all its information.



2.1.2. Unpublish a meeting

To unpublish a meeting, select « Unpublish » after hovering over the corresponding meeting.



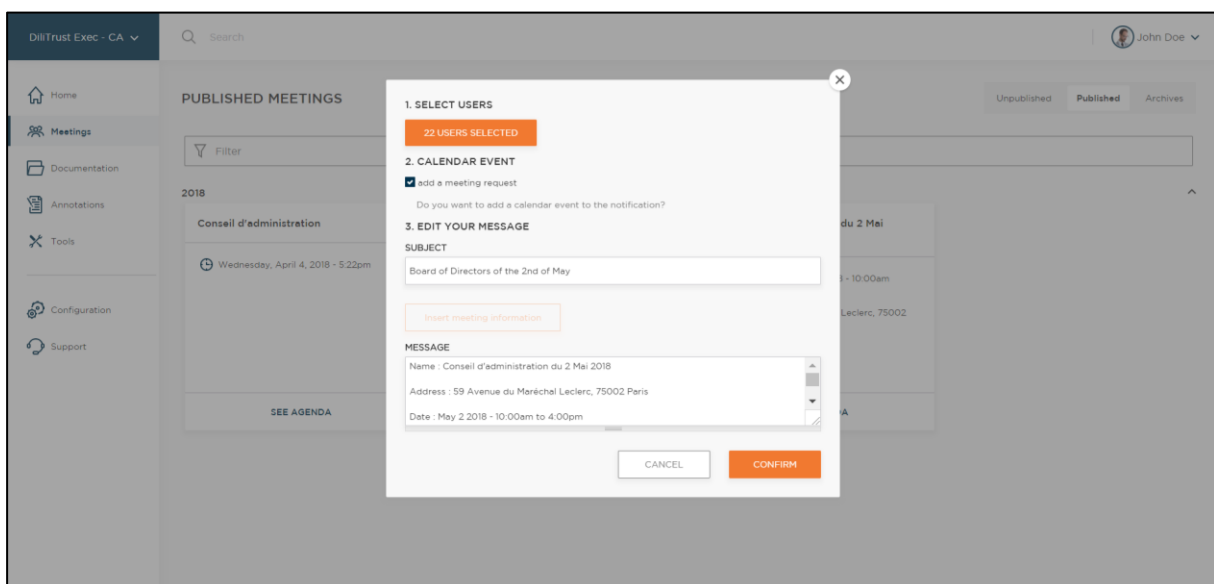
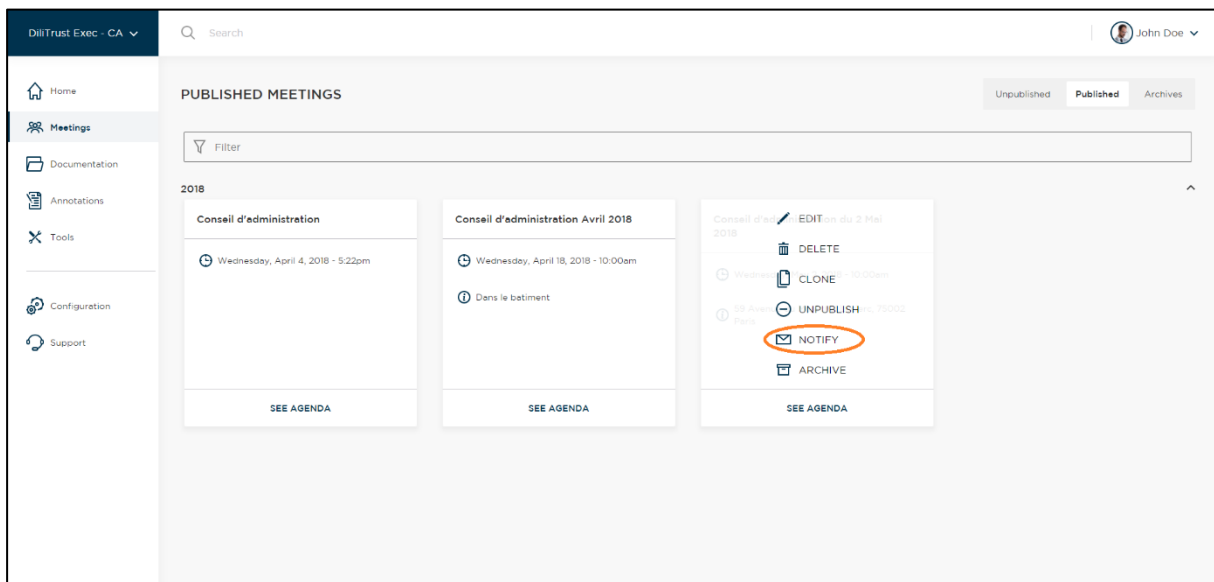
2.1.3. Notify a meeting

To notify users about a new meeting, select « Notify » when hovering over the meeting thumbnail.

A new window opens, simply follow the 4 steps :

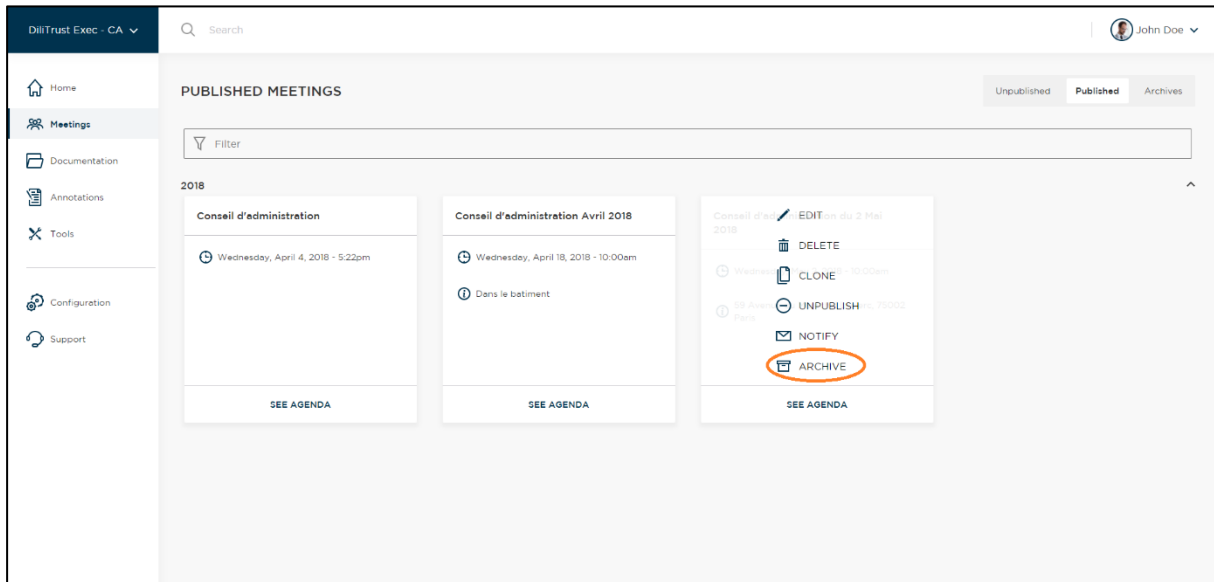
- 1- Choose the persons you want to notify
- 2- You can add a calendar event attached file (.ics) for Outlook , Gmail, etc...
- 3- Write a subject (by default, the notification subject will be «Meeting calendar notifications »)
- 4- Click on « Insert meeting information » so the users will have a direct link to the meeting in the email notification as well as the meeting name, address, date and time. You can also add the message body and click « Confirm » to send the notification to the selected users.

NB: We recommend not deleting the link in the notification.



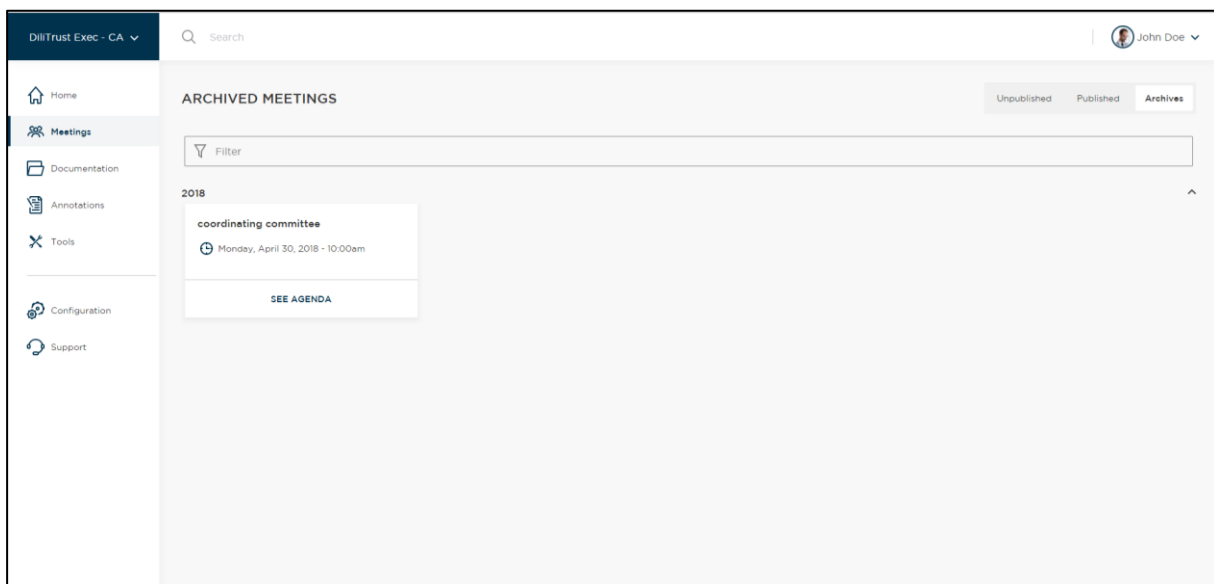
2.1.4. Archive a meeting

When a published meeting has already been held, you can archive it so it will be move to the Archives tab. A confirmation will be required and will allow you to duplicate the meeting in Documentation by checking the box. If you do want to copy the meeting, you will need to create the folder's name. The meeting will then be moved to the Archives.



2.2. Archives

All archived meetings can be found in the Archives tab.



You will be able to Unarchive a meeting to edit it or see its details without altering it.

NB: Unarchiving a meeting moves it to the « Published » meeting tab.

3. DOCUMENTATION

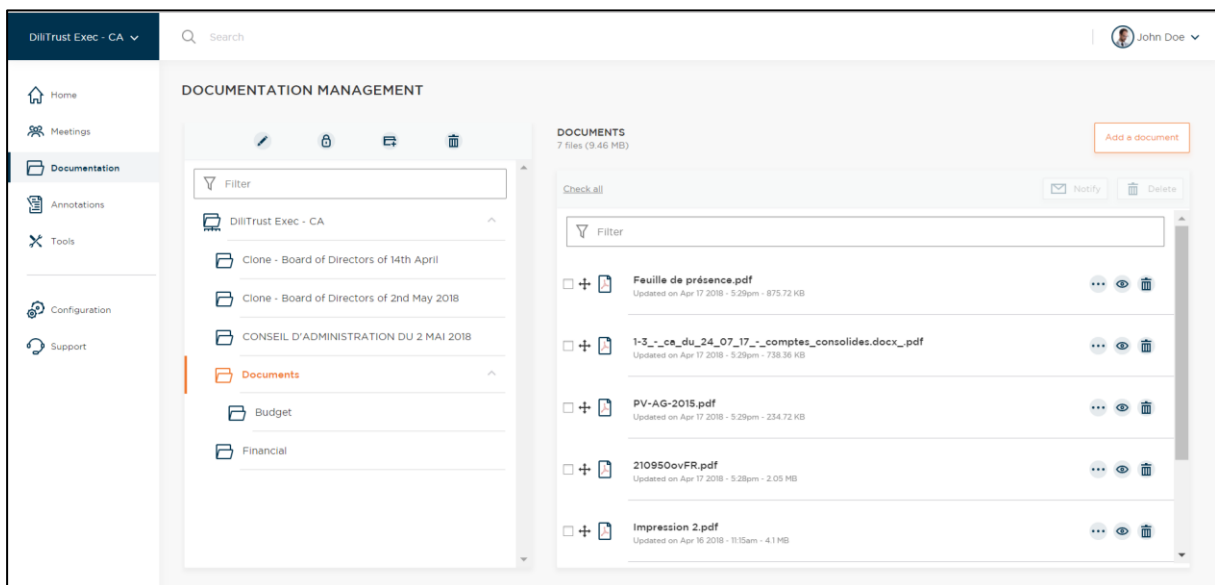
The « Documentation » tab regroups all folders and files that administrators want to share with users related or not to a specific meeting.

In the documentation tab, the main folder is located on the left side of the page (name of your group).


A folder containing subfolders is indicated by a grey arrow on its right.

By clicking on a folder, the files within are displayed on the right of the page.

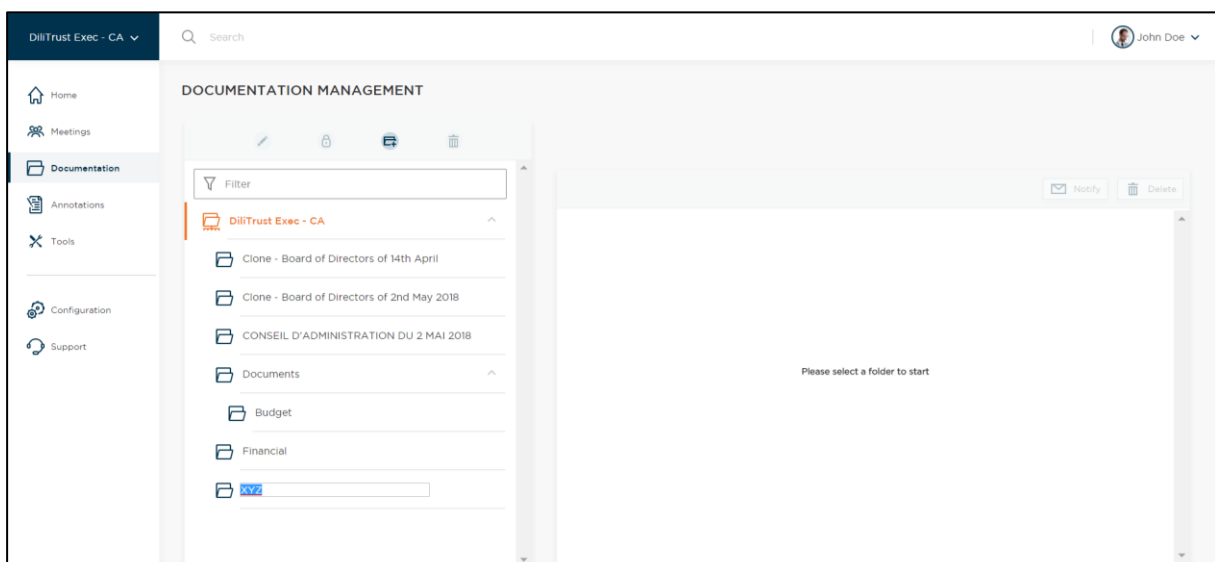
N.B. All features are only accessible by an administrator.




3.1. Add a folder

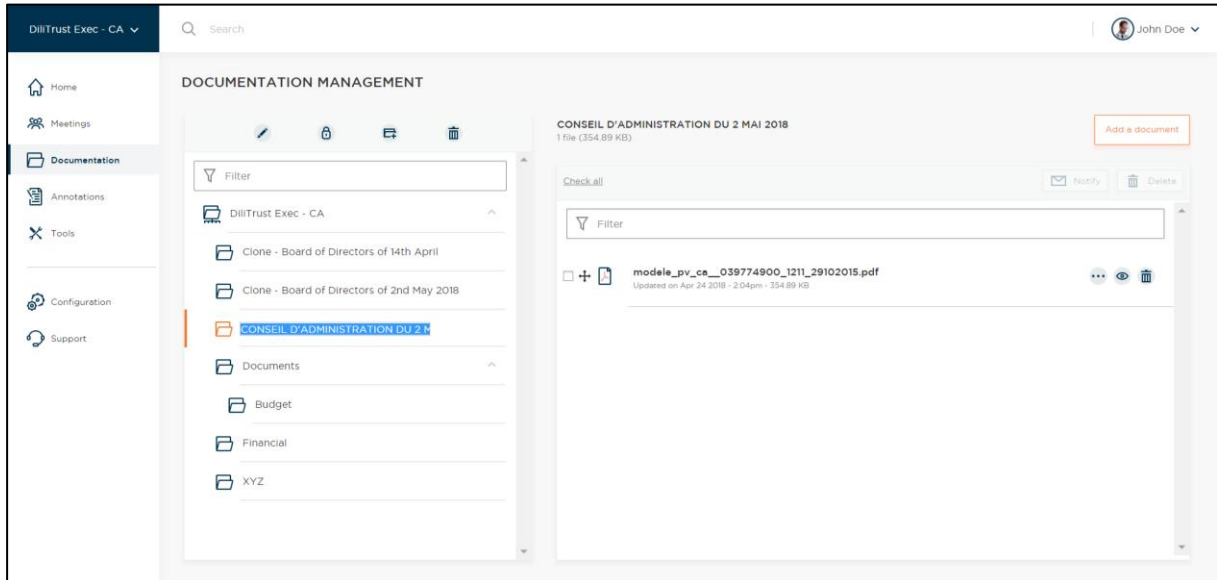
To add a folder in the main folder, select the group name and click on the  button to create a new folder and name it.

The same applies to add a subfolder, select a folder then click .




3.2. Rename a folder

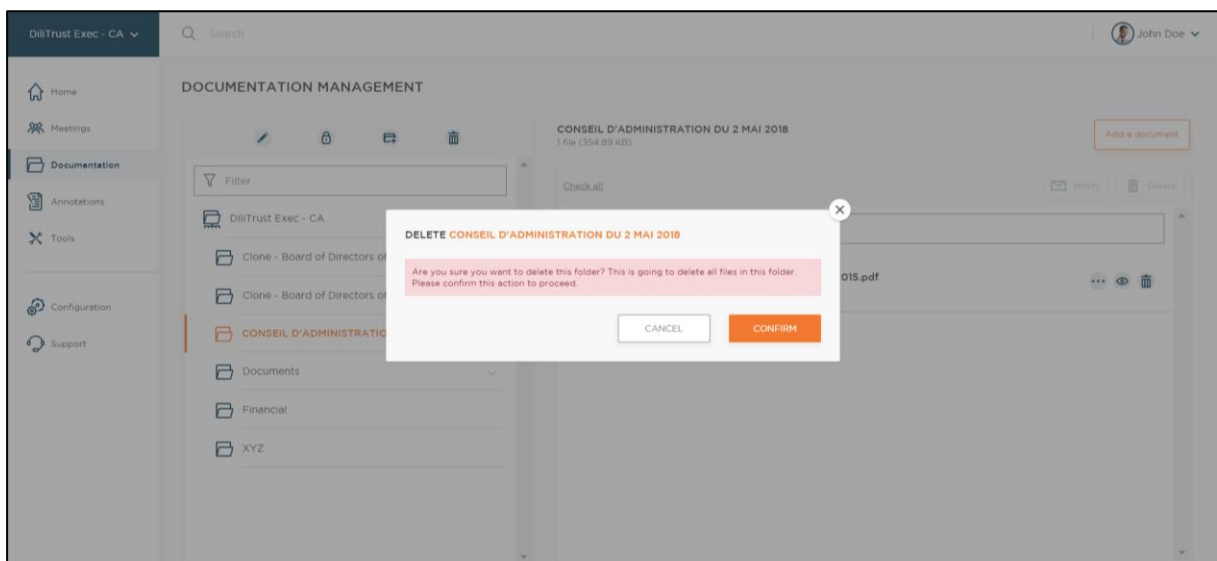
To rename a folder, administrators need to select it, then click  and rename it.



3.3. Delete a folder

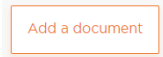
To delete a folder, administrators need to select it and click  (a confirmation will be required).

NB: Files in the deleted folder will be permanently lost.

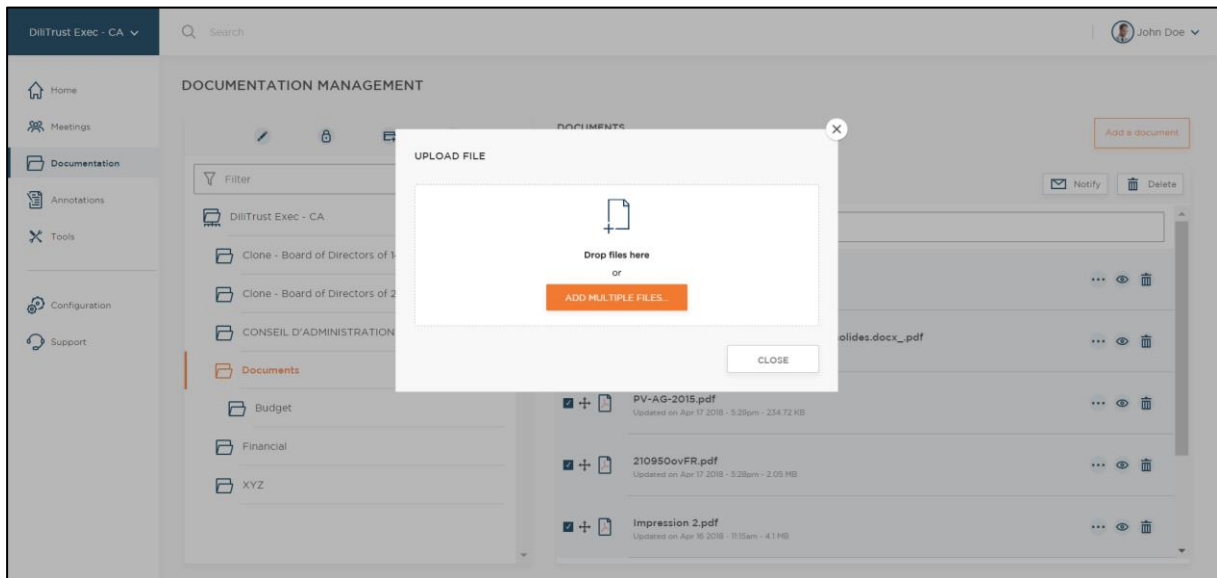


3.1. Add documents

To add documents, select the destination's folder then click on « Add a document »

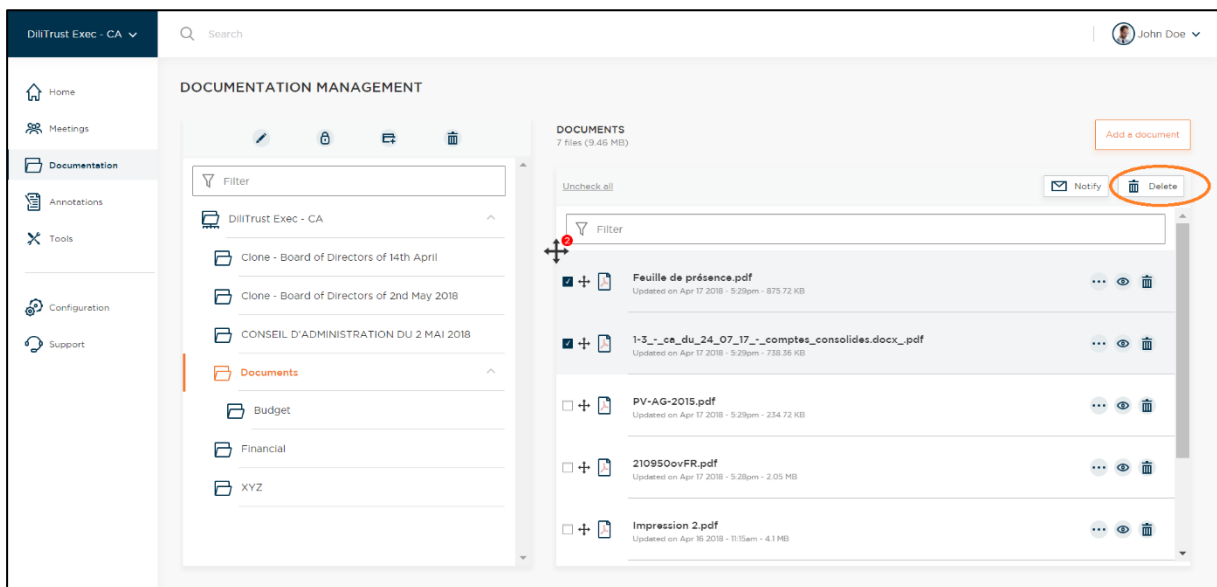


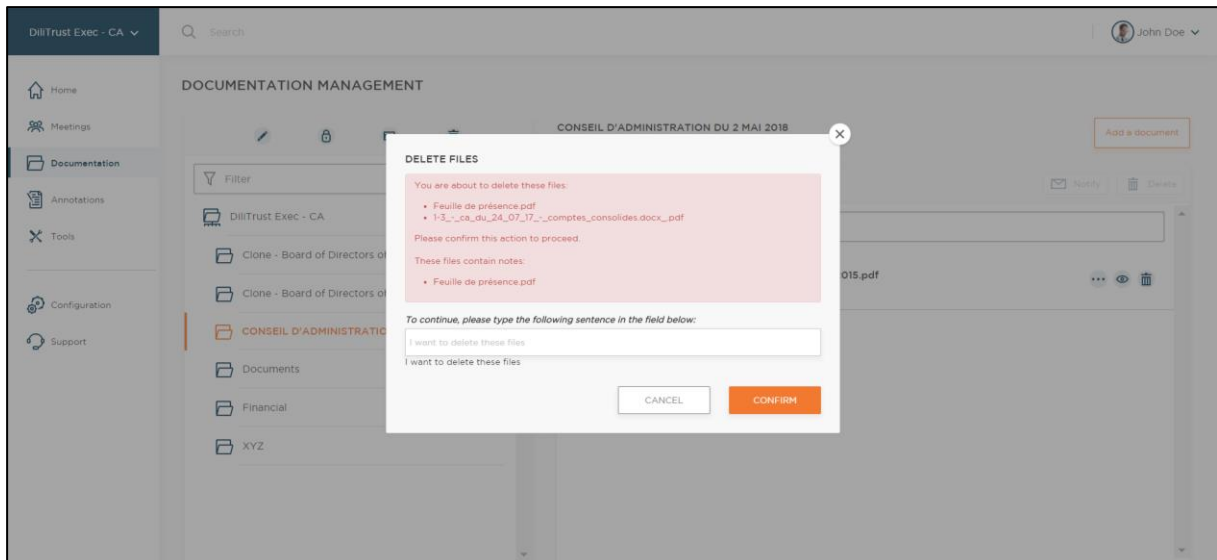
A window opens, drag and drop files or browse them from your computer and they will be uploaded to the selected folder.




3.2. Delete documents


An administrator can delete documents by selecting one or several files and clicking on « Delete » (a confirmation is required).





To delete only one document, click on the  button beside the file.

3.3. Permissions

An administrator may grant access rights by clicking on .

The « Permissions » button allows you to set parameters on the selected folder like adding or removing users or team access rights (views, prints, downloads and watermarks). To apply changes to all documents attached to this folder, check the matching box.



Likewise, the « Propagate change to all subfolders » box needs to be checked if you want to apply changes to all subfolders.

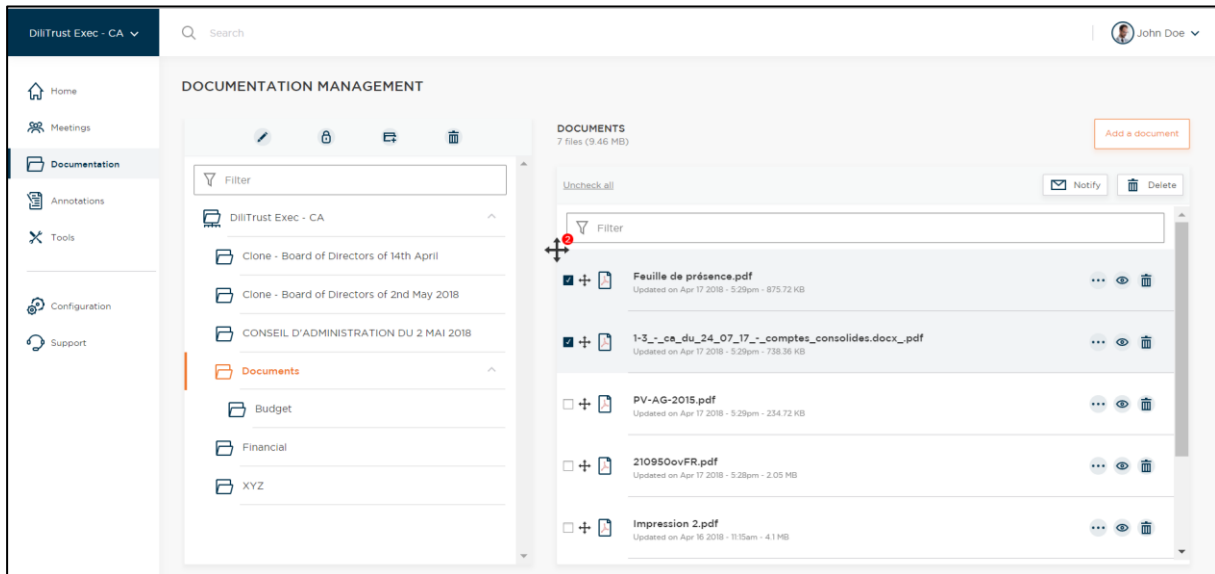
NB: By double clicking on the « All users » dark blue “bubble”, all users will be listed, allowing you to remove one or more users.

3.4. Move a folder

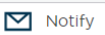
To move a folder, simply drag and drop it where you want it. To move a folder inside another one, just drop it on the desired folder.

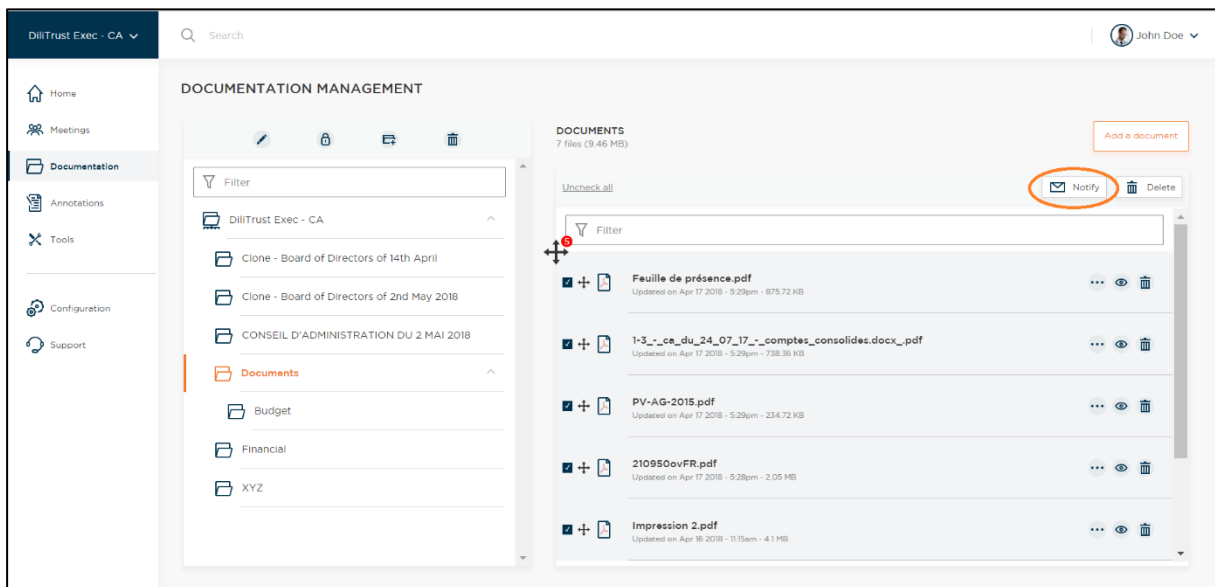
3.5. Move documents

To move documents, click on the  button and drag and drop it where desired. You also can move several documents from a folder at once by checking the boxes to select them, then drag the  button and drop the files where desired.



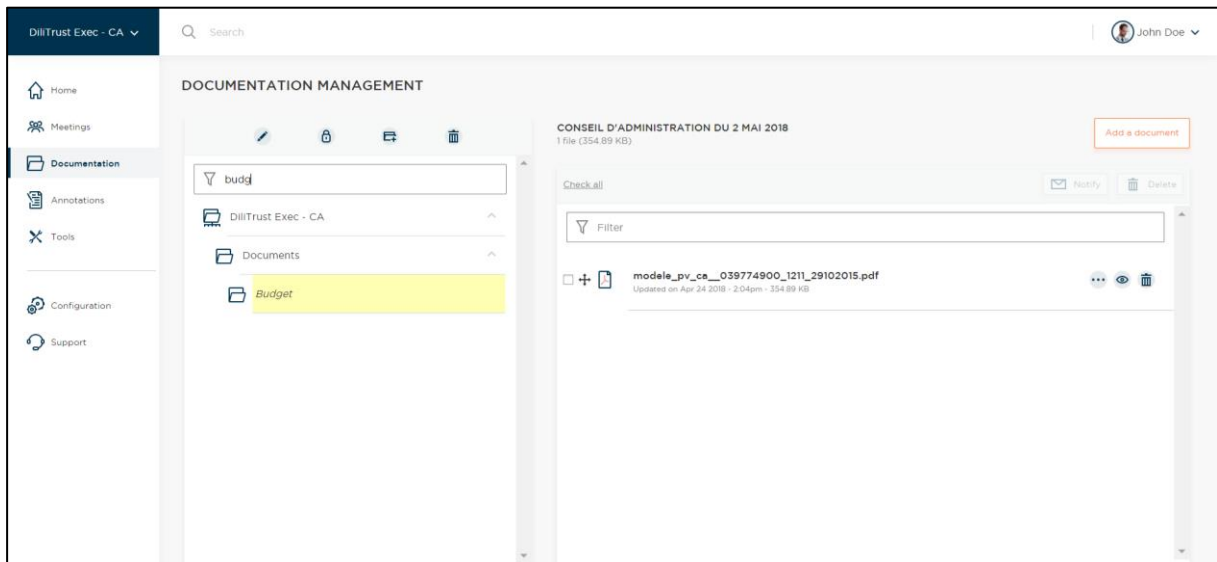
3.6. Notify

An administrator can notify users on documents by checking one or several documents of a folder and click on « Notify »  (top right). Select teams or users to notify in the popup window.

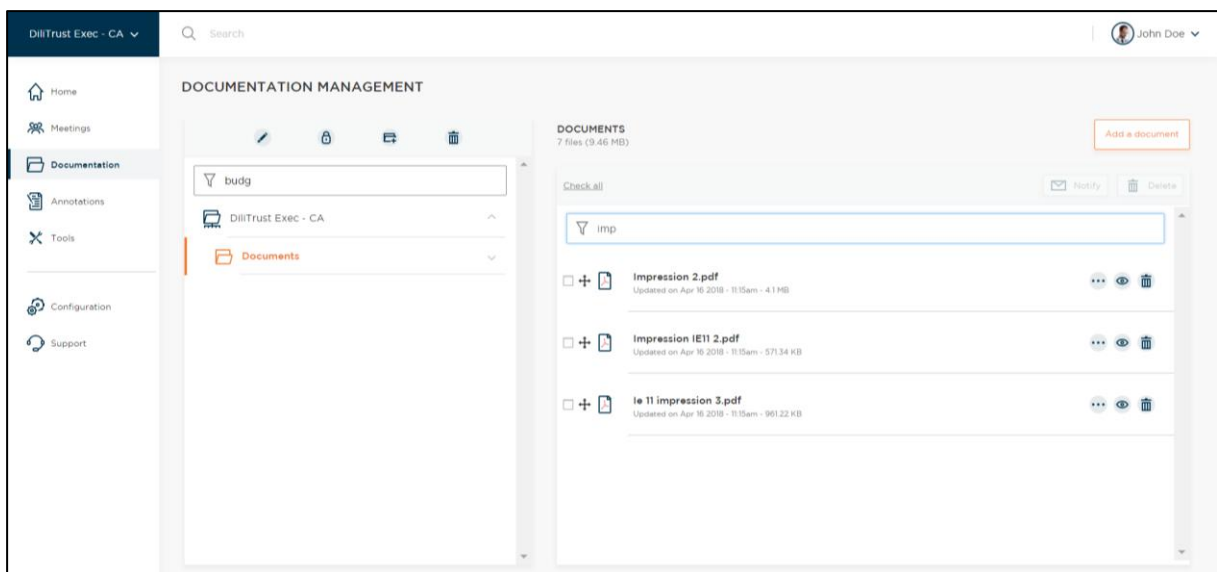



3.7. Search in documentation

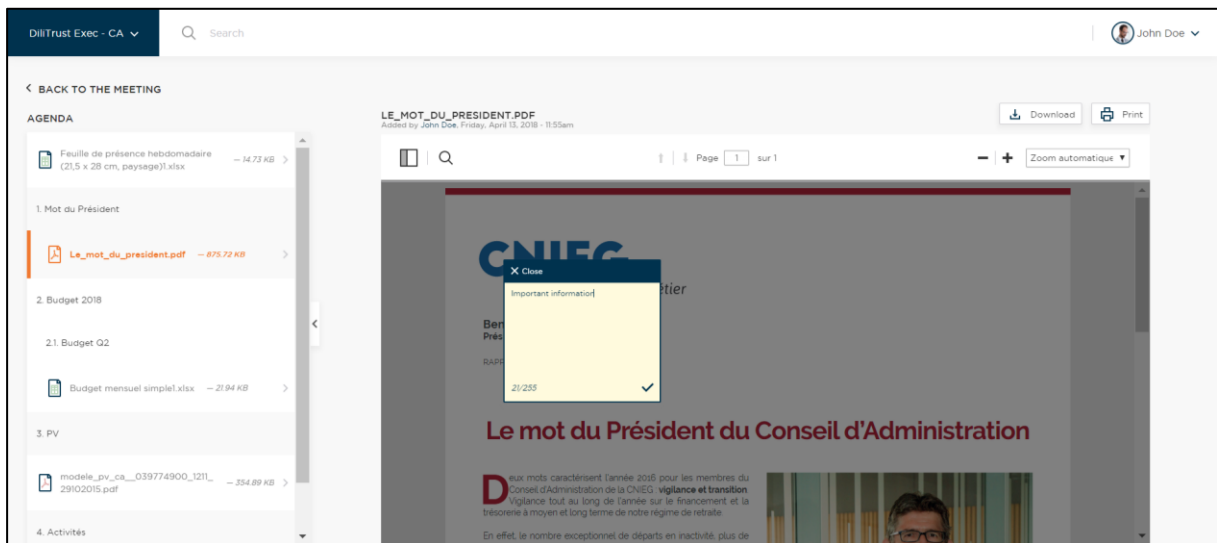
It is possible for users and administrators to filter folders by their name to rapidly find one.






Likewise, files can be filtered by their name in a folder.



- Enter your note
- Save by clicking the 



To close the note, click on the cross on its top right corner, this will not delete the note. You can reopen it on the left margin by clicking on it . The  button will permanently delete the note. To modify it click in its content, edit and save.

To share a note: Open the note and click on the . Users will be listed in a newly opened window, check the ones you want to share the note with. Recipients will receive an email notification with a direct link to the note taken on the document (after login in the portal).

4. ANNOTATIONS

The annotations tab lists all notes (written by hand or in post-it format) taken on the portal, from all groups you have access to.

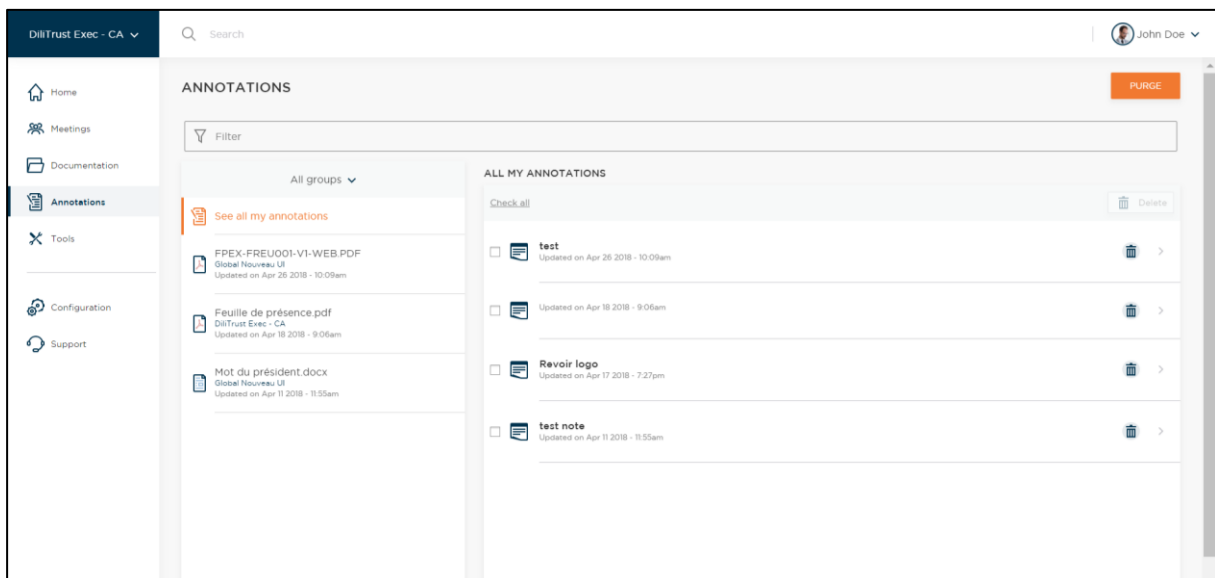
You will find, on the left side, all the documents on which notes were taken. All notes taken will be on the right side of your screen.

By clicking on the note, you will be redirected exactly where the note was taken on the document.

A filter is available to search for a note.

By clicking on a document, all associated notes will be displayed on the right side of your screen.

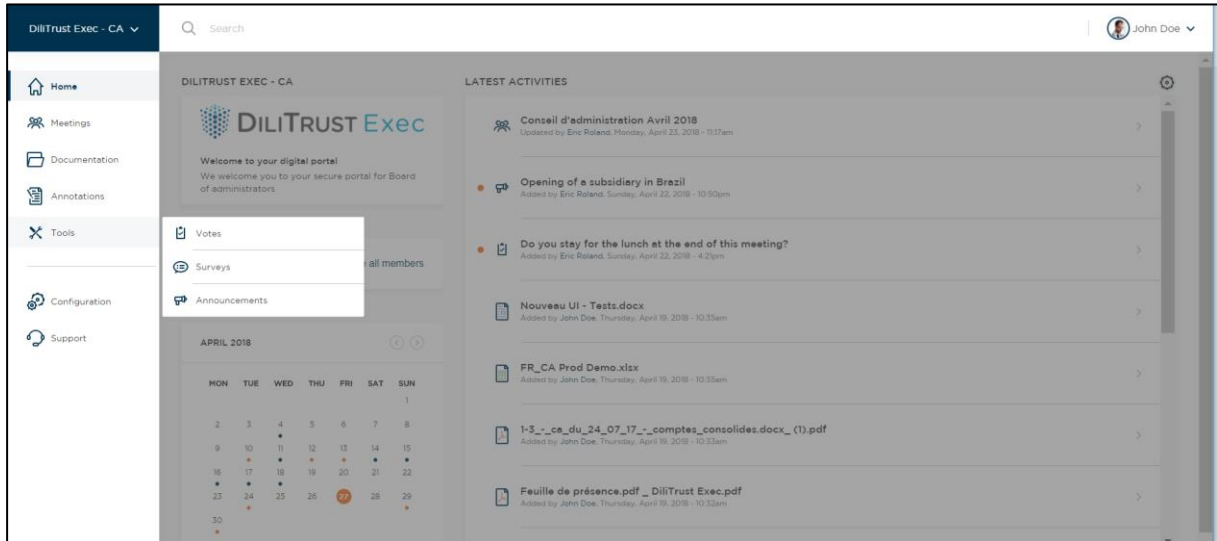
The « Purge » button (top right corner) deletes all notes taken on the portal. This action is final. You will need to type in the phrase mentioned and then confirm.



5. TOOLS

The Tools tab regroups three features:




- Votes
- Surveys
- Announcements

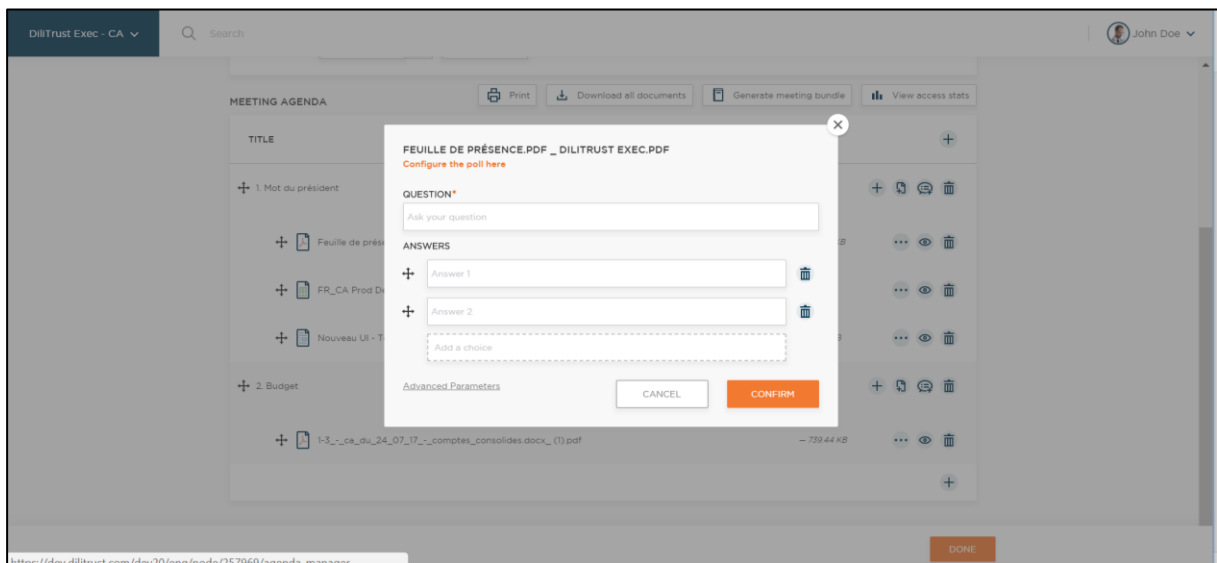


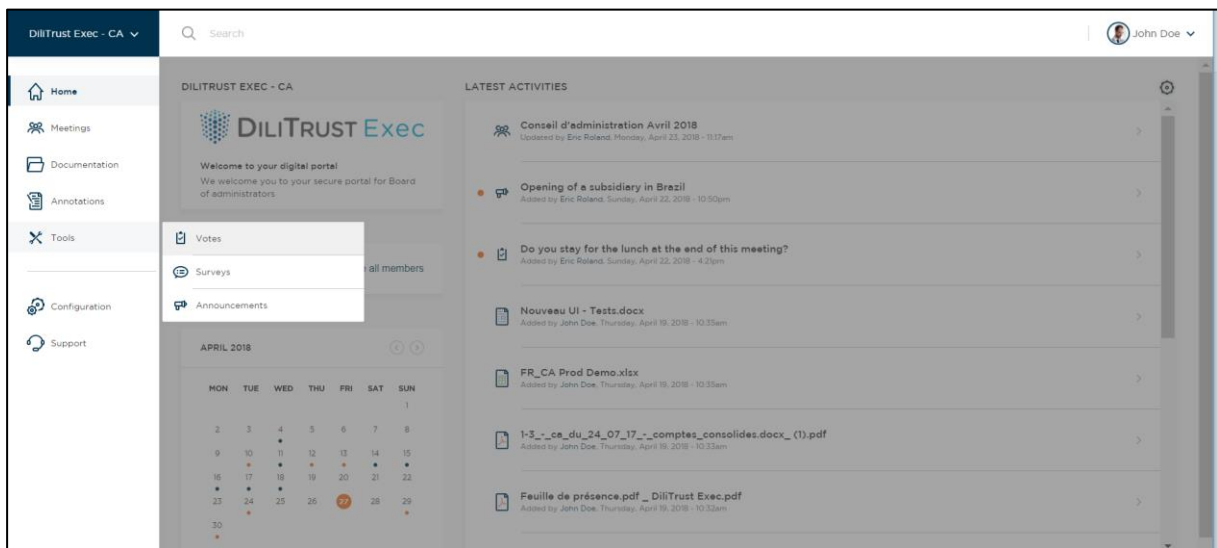
5.1. Votes

You can organize votes and users will be able to vote directly from the DiliTrust Exec app or web version, during meetings.

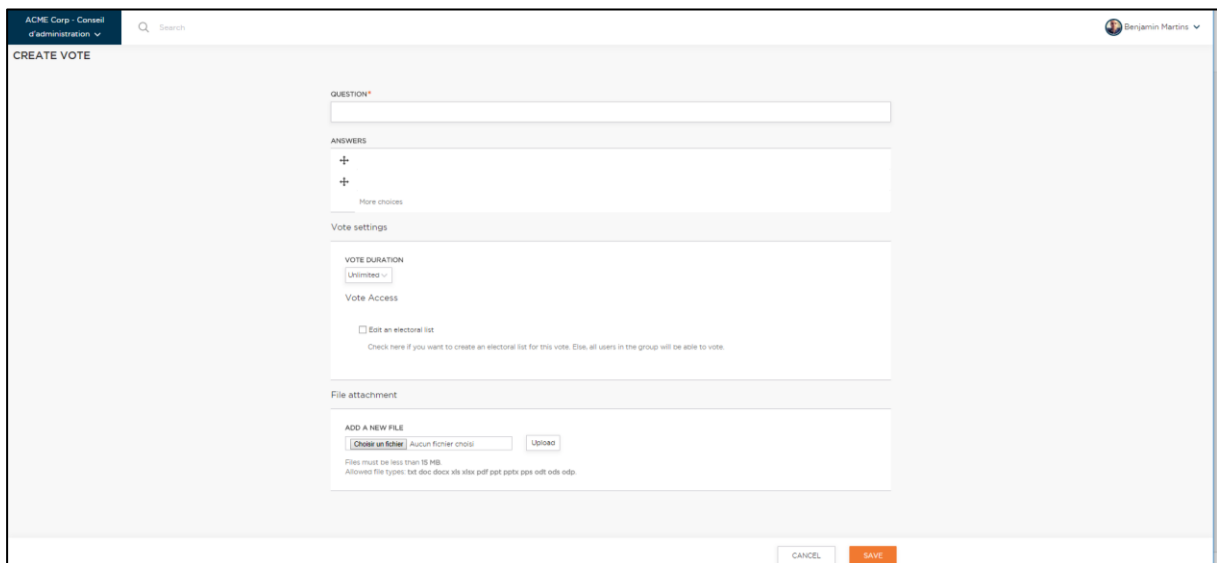
There are two different ways to create votes:

- Directly from a meeting, from a document by doing a mouse over the  button and clicking on .
- From the vote menu by clicking on Tools, votes and the .





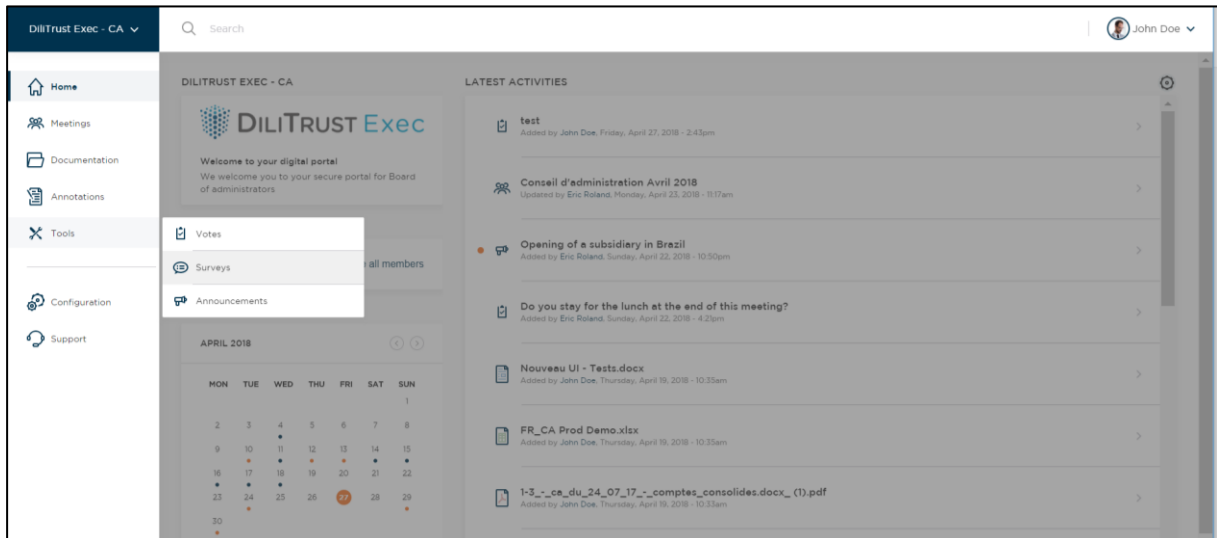
Type a question and the answers choices and click on « More choices » if you need to add more choices. The advanced parameters will allow you to set a vote duration, edit an electoral list (by default all users will be able to vote) and add a file.





NB: By creating votes from the tools tab you will directly have access to advanced parameters as opposed to a vote created from a meeting. All votes are visible on the votes page.

5.2. Surveys


All surveys created or in progress on the group will be listed here. In the same way as for votes you can create a survey from a meeting or from the survey menu (Tools – Surveys)



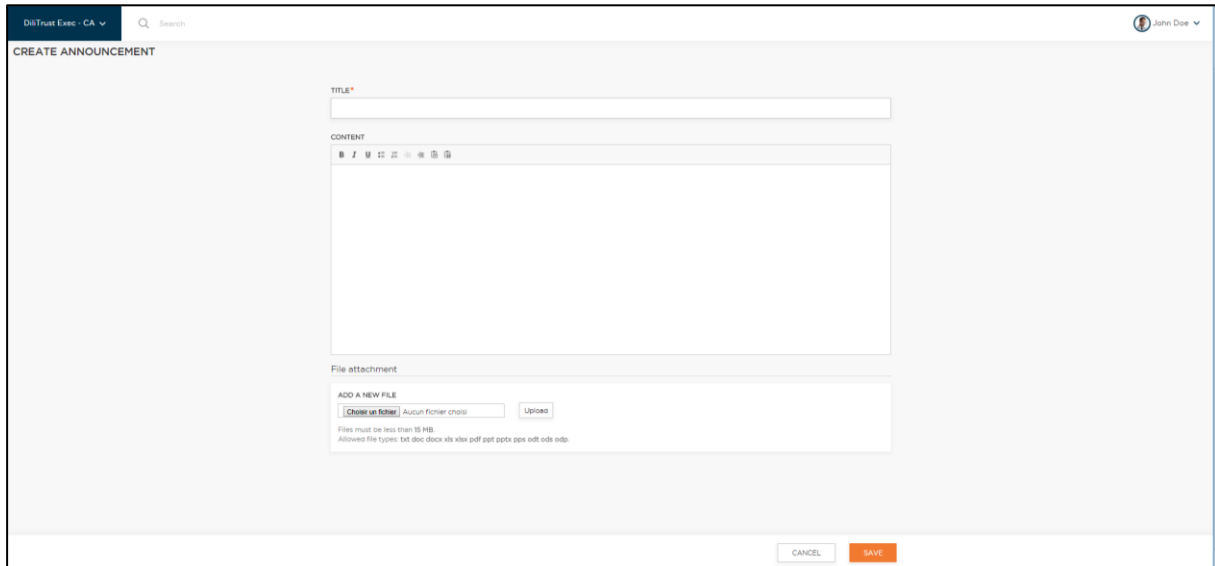
From a meeting click on the  button on a category or subcategory, type in the survey's title, then set duration, user's list and add a question. If you need to add more than a question click on  **Add section**.

5.3. Announcements

Announcements are only available from the tools tab.

To create an announcement, click on  to add one.

You will be redirected to add its title, content and have the possibility to attach a document.

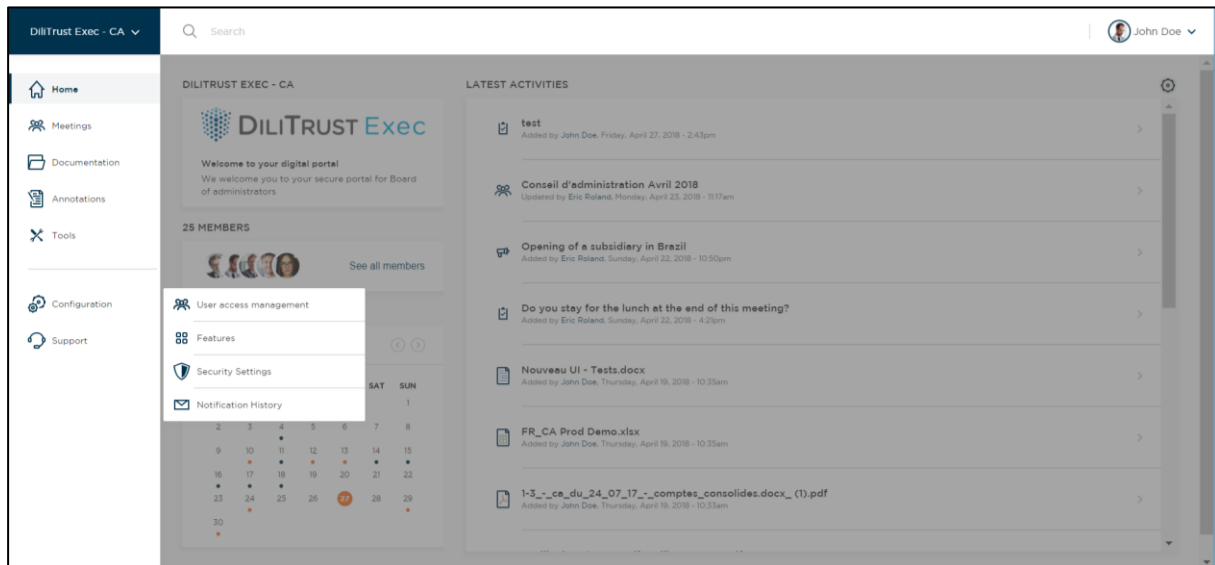


The screenshot shows the 'CREATE ANNOUNCEMENT' form in the DiliTrust Exec interface. The form is titled 'CREATE ANNOUNCEMENT' and is located in the top left corner of the page. It features a search bar and a user profile icon in the top right corner. The form is divided into three main sections: 'TITLE*', 'CONTENT', and 'File attachment'. The 'TITLE*' section has a text input field. The 'CONTENT' section has a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, and list. The 'File attachment' section has a heading 'ADD A NEW FILE', a 'Choose a file' button, a file selection input field, and an 'Upload' button. Below the file selection input, there is a note: 'Files must be less than 10 MB' and 'Allowed file types: txt doc docx xls xlsx pdf ppt pptx zip odt ods odp'. At the bottom right of the form, there are 'CANCEL' and 'SAVE' buttons.

6. CONFIGURATION

This section is only available for administrators. It regroups:

- The user access management
- Features
- Security settings
- Notification history



The two-factor authentication via SMS

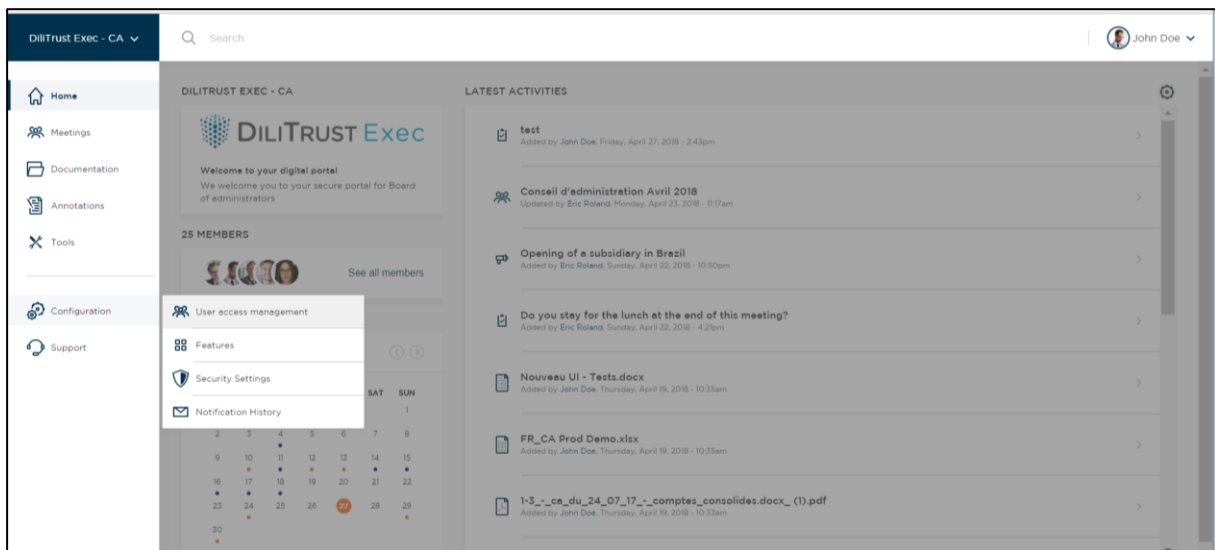
To increase security and access to the DiliTrust Exec portal you can activate the two-factor authentication via SMS for users (administrators included).

When login in the portal you will enter your email address and password, if the information provided is correct you will receive a 6 characters code (numbers and letters) on your mobile phone that you will have to enter to login.

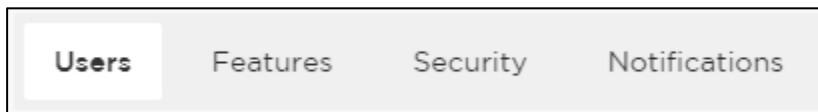
The SMS authentication configuration is done when creating or modifying a user account.

6.1. User access management

The user management access page gives you access to user's list, teams and user's entry and exit history.

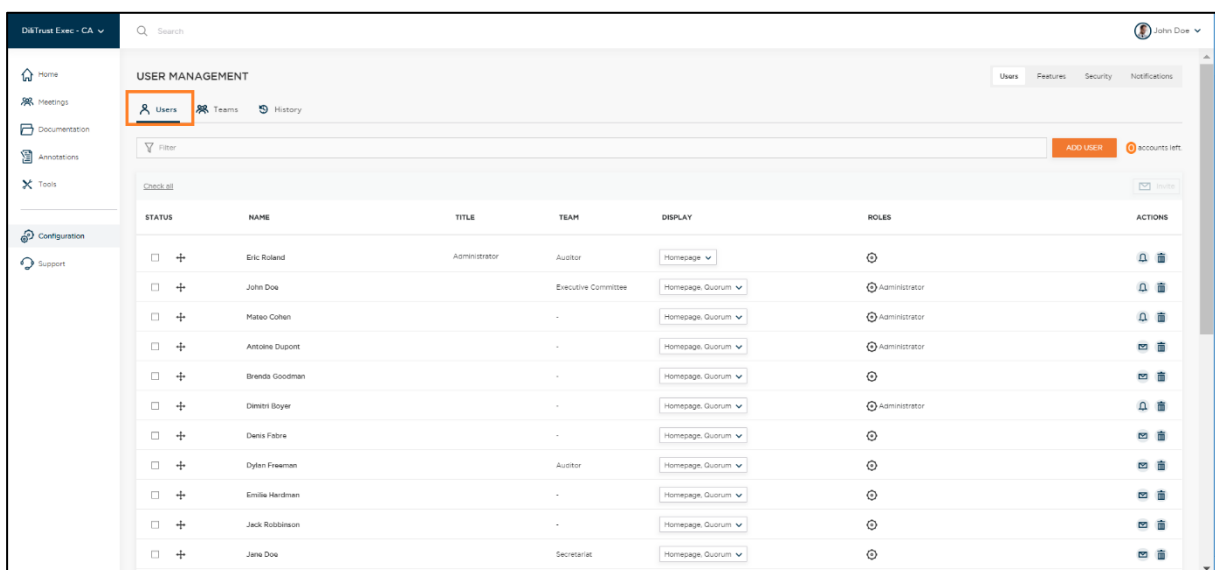


You can also easily access other configuration sections with the top right buttons.



6.1.1. Users

In the user access management section, all users from the group are listed. Remaining seats are also mentioned. For each user you will see his status, name, title in the group, teams he belongs to, display (homepage, quorum), his role and actions permitted on this user.

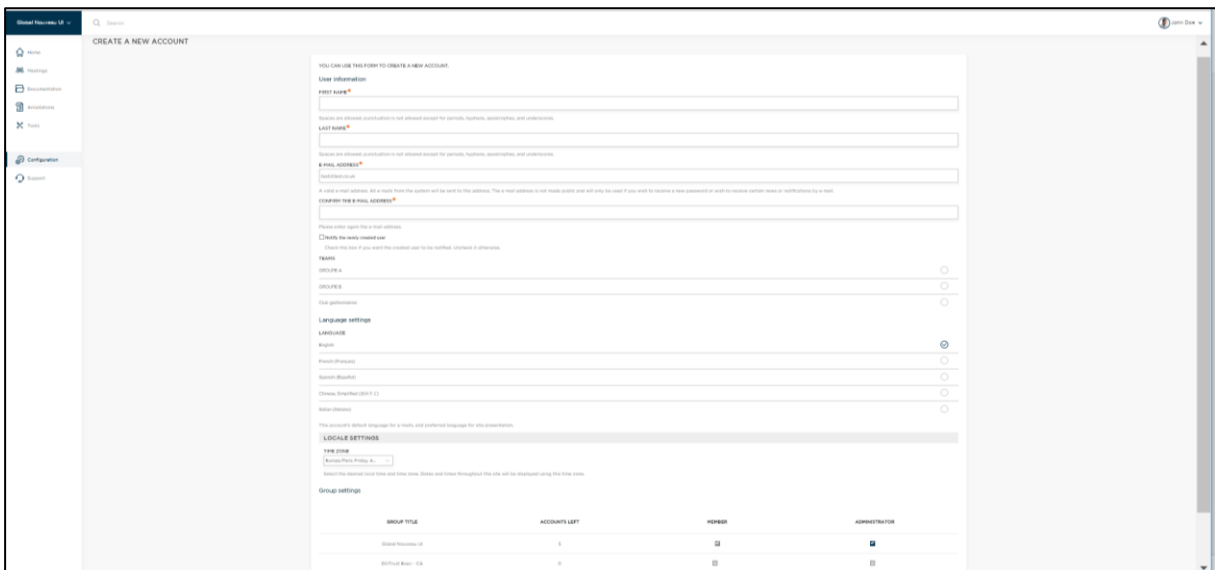


ADD USER



To add a user, click on « Add user », enter his email address, check the administrator box if needed and assign him a team (if any). Users can always be added to teams later.











For a user who already has an account on the portal, a notification will be displayed indicating that this user is already registered on the portal and that you simply need to confirm to add him to the group.

If the user does not already have an account, you will be redirected to an account creating page; Enter his first and last name and confirm his email address. We highly recommend that you notify each created user by checking the matching box upon creation. You will then be able to assign him a team (if any), activate the two-factor authentication, select the language, the time zone and verify what group he is member of with what role.




New users will be added to the user list in « Access right management tab » of this group.


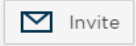
If the « Notify user » box was not checked upon the account creation, a lock  will be displayed for this user, which means that this user is locked. To unlock him click on the  button in the “Action” column, the user will be notified. Once unlocked the lock icon will disappear.


<input type="checkbox"/>			Jack Collins	-	Homepage, Quorum			
<input type="checkbox"/>			John Malcolm	-	Homepage, Quorum			

If you need to send an email invitation to the new user you will need to click on the  icon.

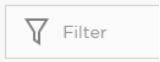
You can assign or remove administrator role to users by clicking on  and checking or not the administrator box.

The  button allow to remove of user from the group.

For users to access the group, an invitation must be sent. To invite users, click on . To invite several users at once, select them by checking the matching boxes then select  on the top right.

If a user forgot his password you will be able to send him a link to reset a new one with the  button.

Users can also reset their password by browsing the <https://exec-eu.dilitrust.com/> (for Europe) and <https://exec-na.dilitrust.com/> (for North-America) website, then selecting « Forgotten password? » and confirm.

The  allows you to search for a user.

If the two-factor authentication via SMS is enabled:

In the user creation form, two new fields will appear.

Enable two factor authentication for this user

Check this box if you want the created user to go through TFA authentication process.


TFA PHONE NUMBER

Phone number must follow the international convention (e.g : +131 11223344 or +33635656568).

For France the area code is 33 and for Canada, it is 1. Then enter the phone number without space or dashes.

Interval between 2 TFA processes: it is possible to set the period the system will ask for the TFA. You can choose to set it for 15 minutes, 1 hour, 1 day, 3 days or a week.

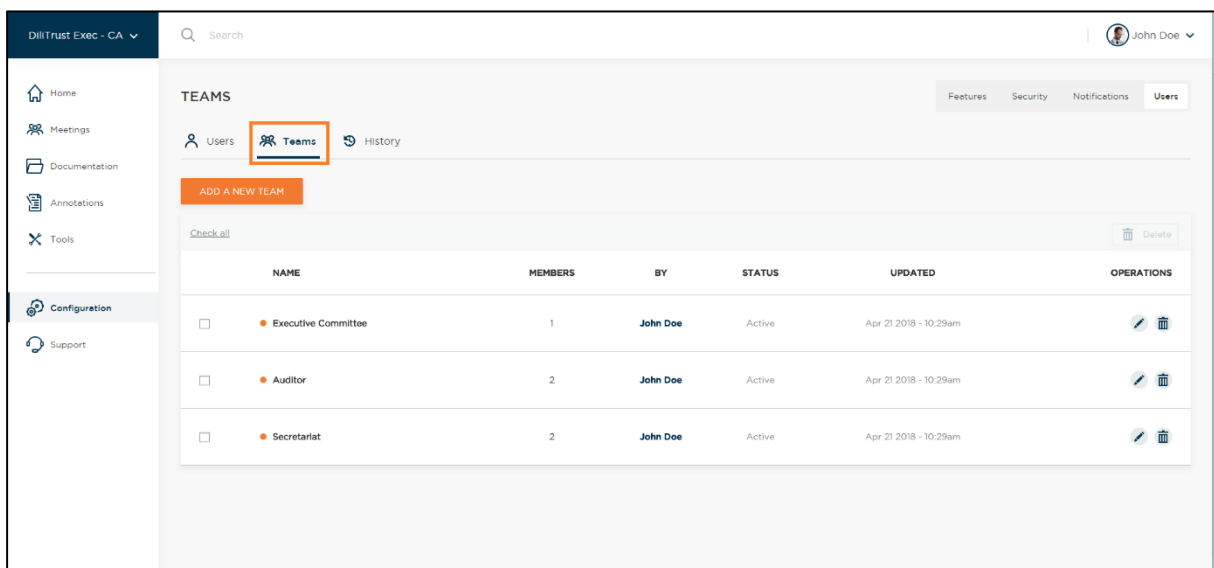
Backup Codes:

Backup codes allows you to still access the portal even if you do not receive the one-time code via sms on your phone. By going to your profile (« See my profile », then « Edit »), in the « **two-factor authentication** » section, the  button gives you access to your ten backup codes. To display the ten backups codes, you will have to previously fill in your password.



6.1.2. Teams

In the « Teams » section, all teams created on the group are listed. In a team, administrators can add users and manage their access rights to documents by group.



To create a team, click on the « Add a new team » button, type in the team’s name, its status (active/inactive), choose users to add to the team, then choose the watermark settings. For the watermark setting, select "Yes" in the "Customize the Watermark" section, enter either a text or one or more proposed tags spaced from each other. Choose a font size and the watermark color on documents.

NAME*

STATUS*

Active ↑
↓

MEMBERS

Choose some users
↑
↓

WATERMARK SETTINGS

CUSTOMIZE THE WATERMARK ?

Yes ↑
↓

WATERMARK TEXT

Available tags for watermark: @group, @team, @username, @lastname, @firstname, @date

WATERMARK FONT SIZE

3 ↑
↓


WATERMARK COLOR

▼

e.g : Document ouvert par @firstname @lastname le @date

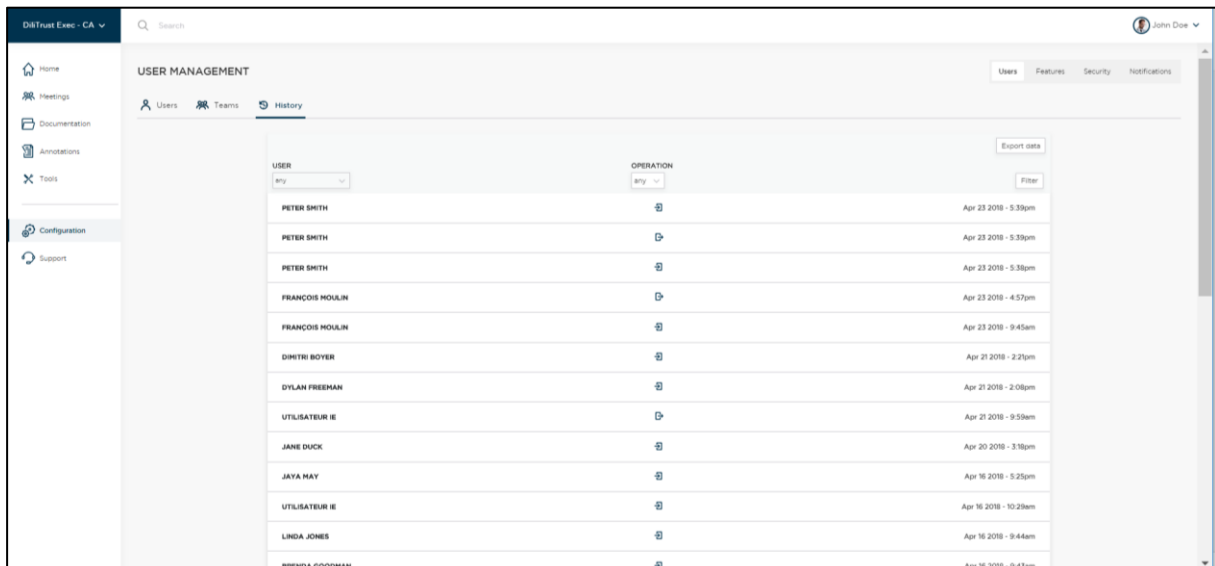
CANCEL

CREATE

To edit a team, select the  button. A window will open allowing you to edit all the fields presented during the team creation. You can add or remove users from this window. Select « Edit » to save your changes.

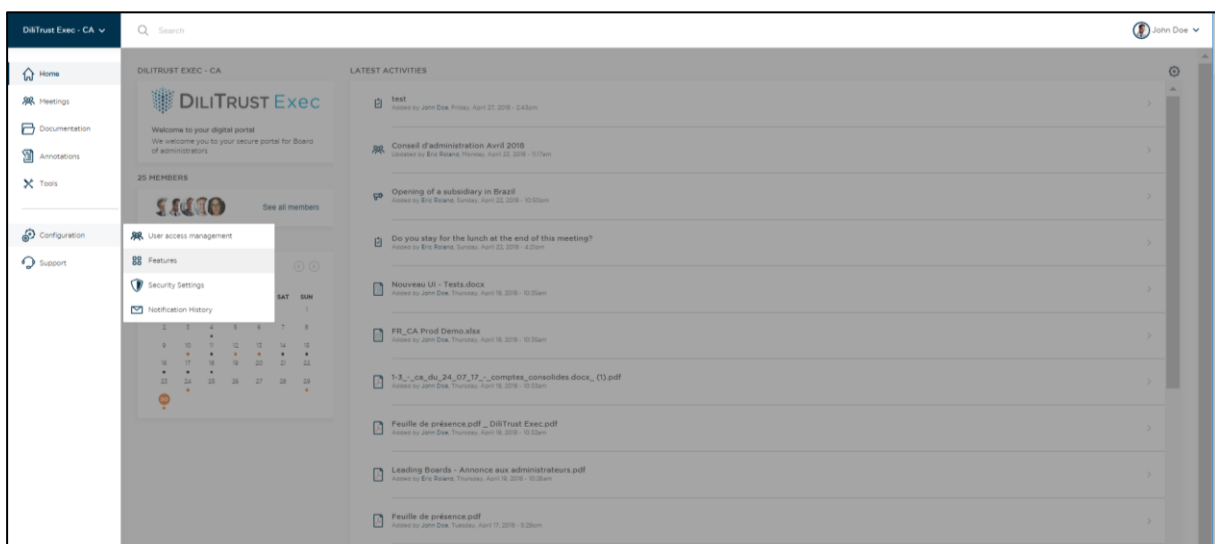
6.1.3. History

The « history » tab lists all users who accessed or left the group (entry or exit). You will be able to sort by users or operations to have information on these actions dates. All data can be exported by selecting « Export Data ».



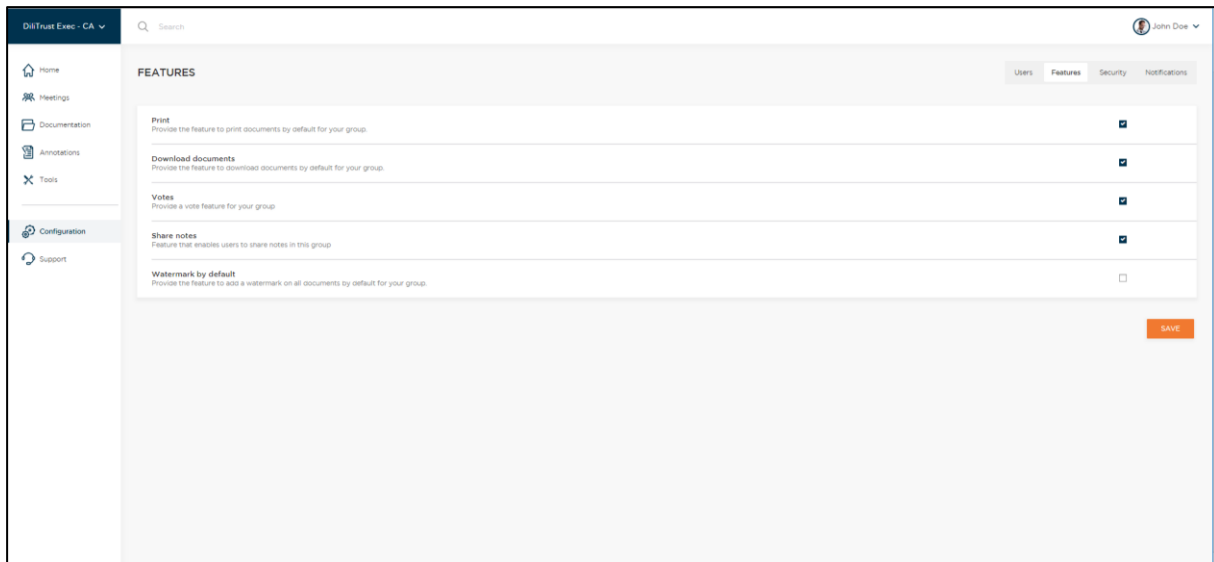
6.2. Features

To access the group features, you can either select « Configuration » then « Features », or directly select « Features » if you are on a configuration page (user access management, security settings or notification history).



In this section you enable or disable the following features:

- Print
- Download documents
- Votes
- Share notes
- Watermark by default

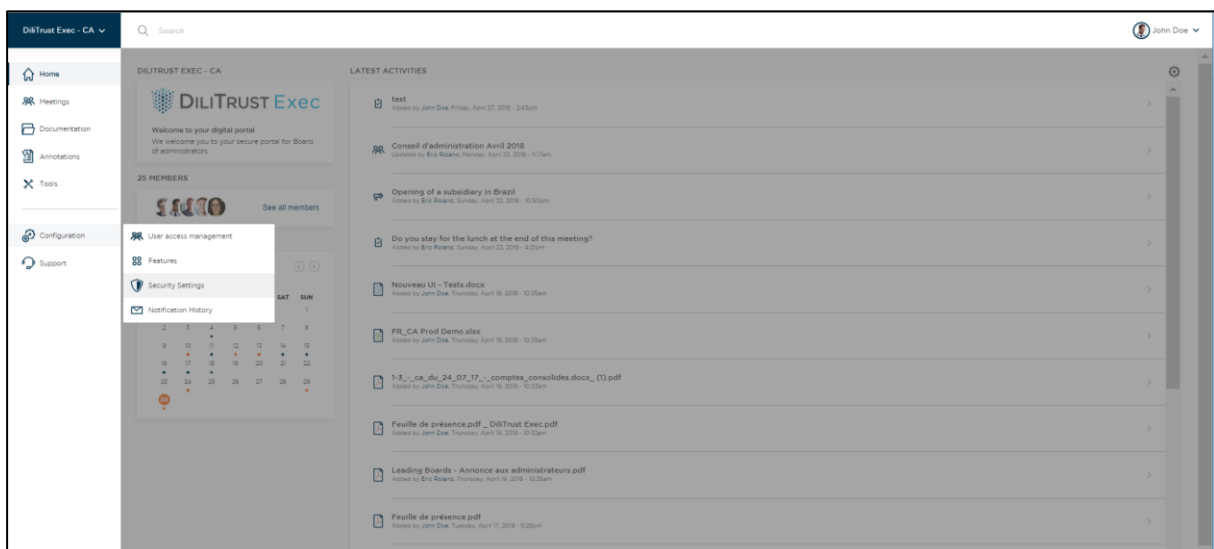


By default, all features but « Watermark by default » will be enabled. To disable features, simply uncheck the matching feature box then save your changes.

NB: Printing and downloads are enabled by default for all documents on the portal.

6.3. Security settings

To access the security settings, you can either select « Configuration » then « Security settings », or directly select « Security settings » if you are on a configuration page (user access management, features or notification history).



This section allows you to set security settings for all users within the group.

You can allow users to save their password on their tablets to prevent them from typing it each time they log in.

On tablets, users can synchronise documents of the group and to work offline (Offline mode). You can authorize users to store data (encrypted) on their tablets and the delay for them to reconnect to internet to save their work. Past this time all data will be lost. (erase data stored

on tablets after...). This limit force users to reconnect to internet to synchronise back his documents and to also avoid users working on documents that were updated.

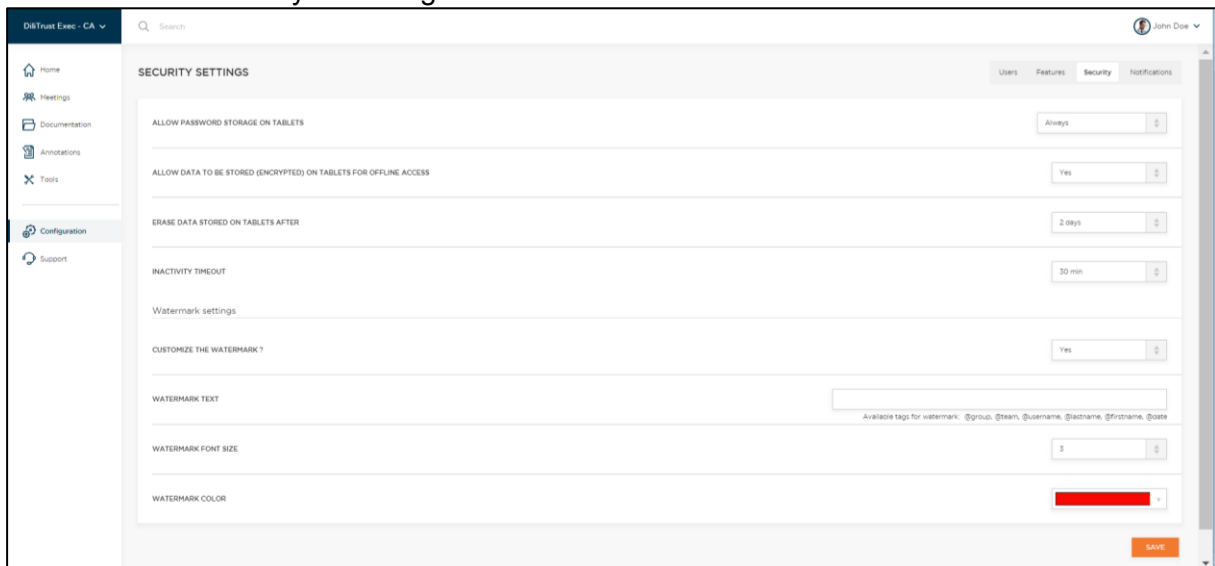
The inactivity timeout, is the time that users can stay on the portal before being disconnected.

If a user is also in another group, the strictest inactivity timeout will be applied.

The watermark settings defined here will be those applied to documents when the default watermark is enabled.

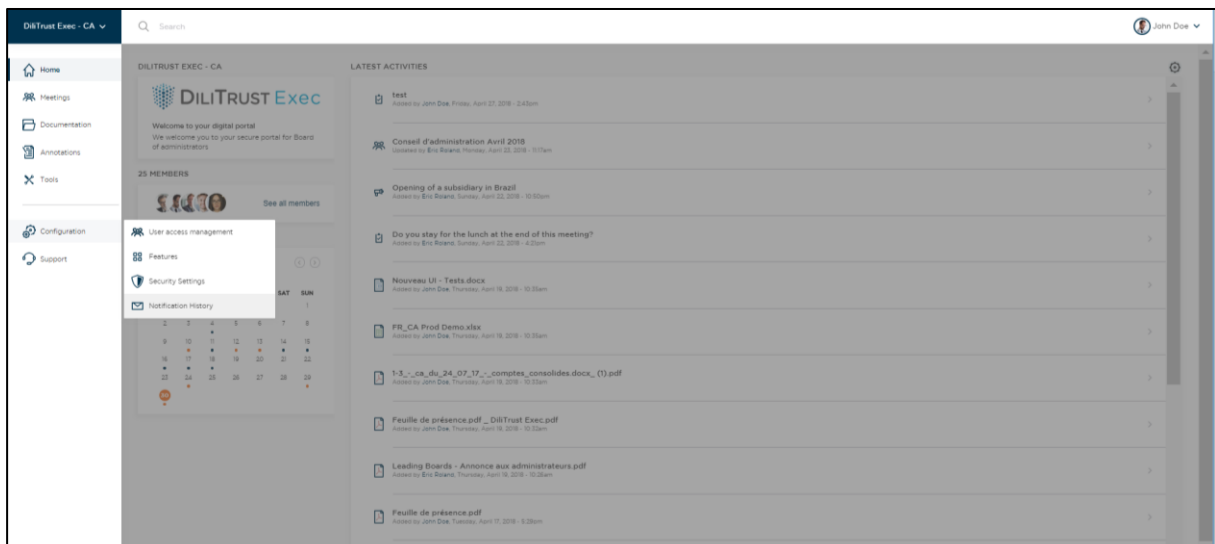
To set the watermark, select "Yes" in the "Customize the Watermark" section, enter either a text or one or more proposed tags spaced from each other. Choose a font size and the watermark color on documents.

Select "Save" to save your changes.



6.4. Notifications history

To access the notifications history, you can either select « Configuration » then « Notifications history », or directly select « Notifications history » if you are on a configuration page (user access management, features or security settings).



You will find the history of all notifications sent to users in this group. Are listed: documents notifications, meetings, invitations sent to users and password reset requests.

By clicking on the notification name on the left, its content will be displayed in the page centre.

You can also filter the notification's content.

All information displayed on this page can be exported in a spreadsheet.

7. SEARCH

The search bar is always available on the portal right beside the group's name.

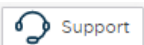


Search allows any user to find a word in any content type he has access to (meetings, documents, announcements).

To search, enter a keyword in the search bar and click "Search". The search results list is displayed in the page centre.

By clicking on a document, you will be redirect directly to the document. If the document is in a meeting, the meeting's agenda will be displayed on the page left. If the file is from the documentation only the document will be displayed.

8. SUPPORT

On the left, the  Support button is available. All support telephone numbers and email address will be displayed by clicking on it.



TECHNICAL SUPPORT AVAILABLE 24/7

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 North America:	+1 855-923-3117
	support@exec.dilitrust.com