



DILITRUST

User Guide Tablet - DiliTrust Exec

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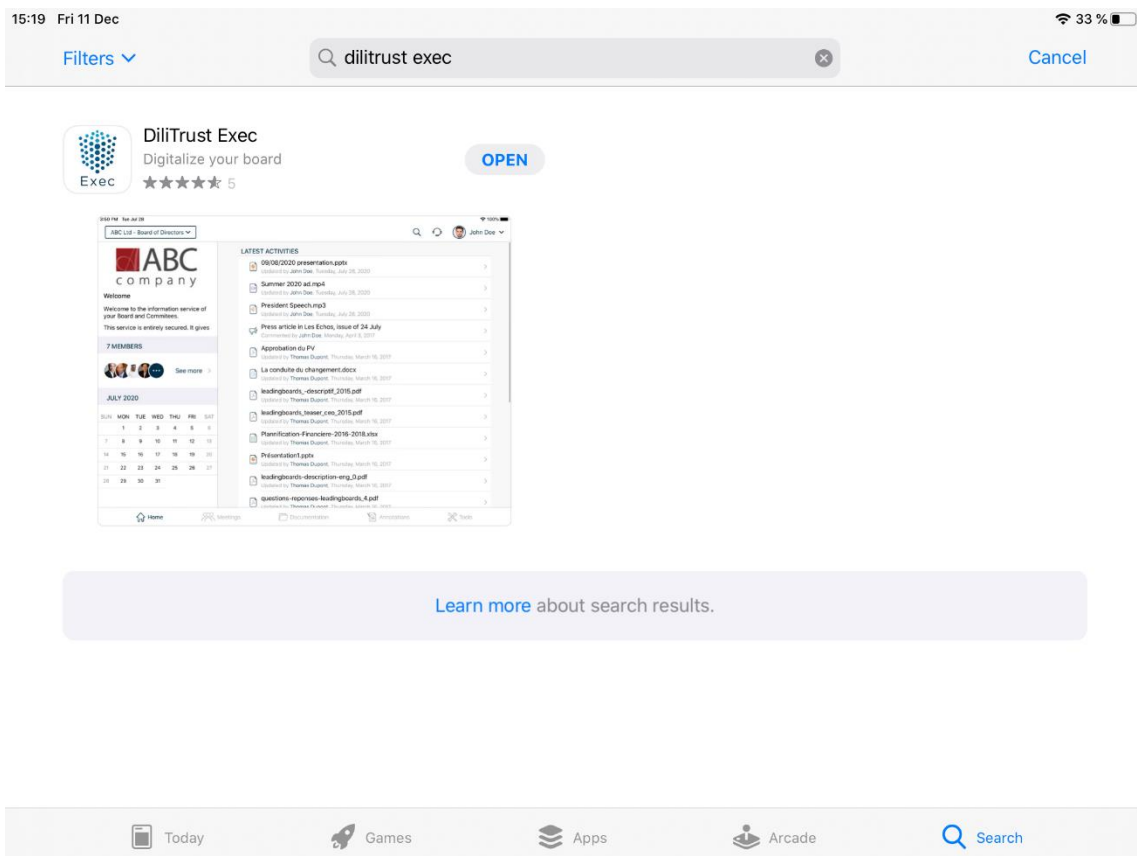
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1. INSTALLING AND LOGGING INTO THE TABLET APPLICATION

1.1 Download from the App Store & Google Play Store


- **On iPad**


On the desktop of your iPad, click the icon  of the Apple Store to find the application. In the search bar (top right corner of the Store), enter "**DiliTrust Exec**". To install the application, click on the "**Free**" and then on "**Install**" so the application will place itself on the desktop of your iPad.



Note: to update the application, open the Apple Store and click "**Updates**" if the DiliTrust Exec application appears in the list, you can download the new version. **To receive automatic updates of the application, go to the settings of your Ipad. In the "iTunes Store and App Store" tab, click on "Automatic Downloads" and then turn on "Updates".**


- **On Android**

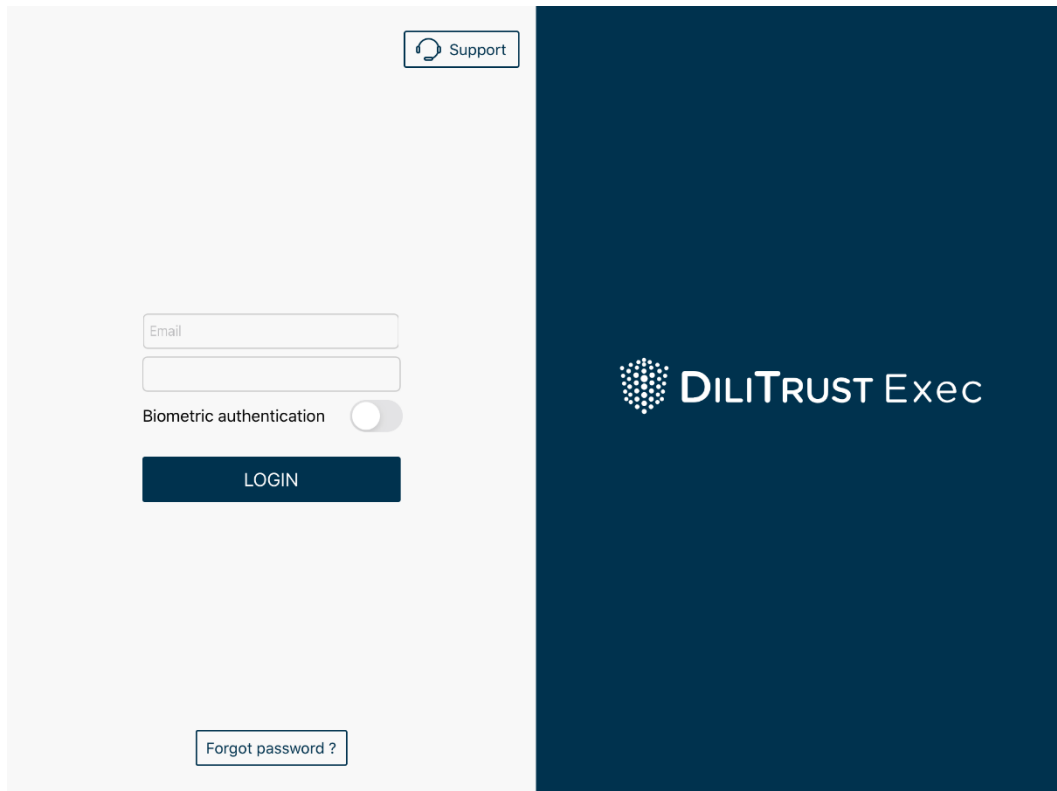
On the desktop of your Android tablet, click on the icon of the Google Play Store  to find the application. In the search bar (top right corner of the Store), enter "DiliTrust Exec".

To install the application, click on the DiliTrust Exec icon  and then click on "Install" so the application will place itself on the desktop of your tablet.

1.2 Starting the DiliTrust Exec App

For the first connection on the portal, your device must be connected to Internet.

After the installation of the app on the tablet, click the icon  to open the application. Put in your email address and your password and click "Login".




If you have forgotten your password, click "**Forgot password?**". Then, you will need to enter your email address in order to receive an email with instructions to create a new password. You can save your email address and password to automatically log onto the portal by selecting "**Remember Me**".

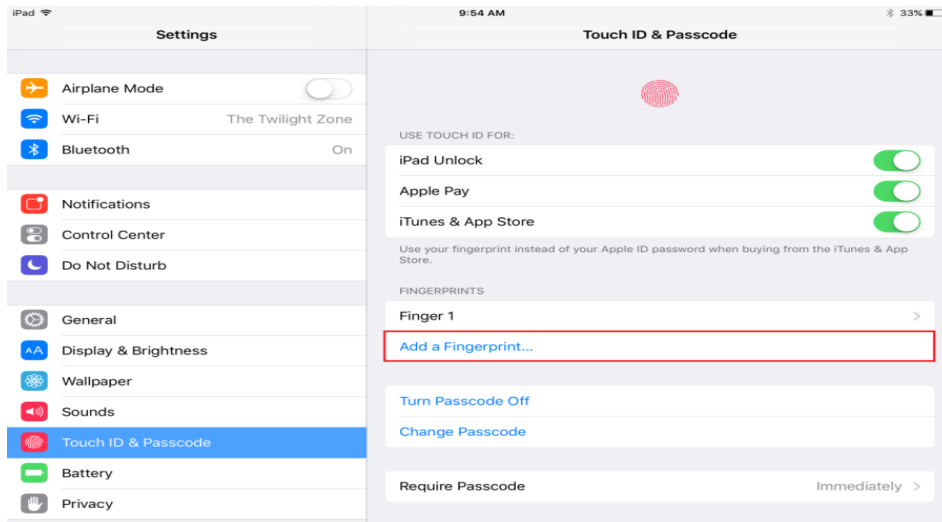
If you do not receive an email, check that you have entered the correct email address and also look in your spam box or junk mail.

- **Touch ID : First login with your fingerprint (only on iPad)**

You can log into DiliTrust Exec in a secure way with Touch ID. To use this feature, your fingerprint has to be saved in your iPad.

In order to save your fingerprint, you need to go to "**Settings**"  and click on the "**Touch ID and passcode**" in the left column.

Follow Apple's detailed steps to add your fingerprint and confirm.



Open the **DiliTrust Exec** app. Once you have entered your email address and password, tick the box "**Remember me**" and click on "**Login**".
 A message "**Use Touch ID?**" will appear. Click on "**Use ID Touch**". After clicking on this button, you will be able to connect by simply putting down your finger on the "**Home**" button of your iPad.

- **Touch ID : Login with your fingerprint**

From then on, when you will open the **DiliTrust Exec** app, a message "**Touch ID for DiliTrust Exec**" will automatically appear for authentication.

When this message appears, you will be able to login by putting down your finger on the "**Home**" button of your iPad. By clicking on Cancel, you will have to enter your password manually.

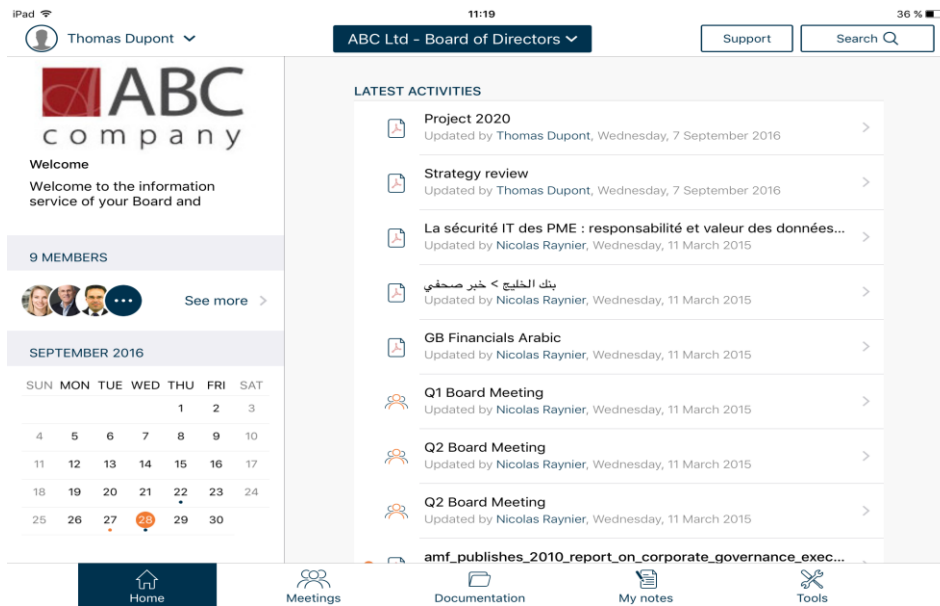
If you want to see the Touch ID message again, you simply need to click on the fingerprint logo in the password box.



IMPORTANT: THE "REMEMBER ME" BOX HAS TO BE TICKED TO HAVE THE TOUCH ID ACTIVATED.

2. HOME PAGE

The home page of your board portal consists of several sections :



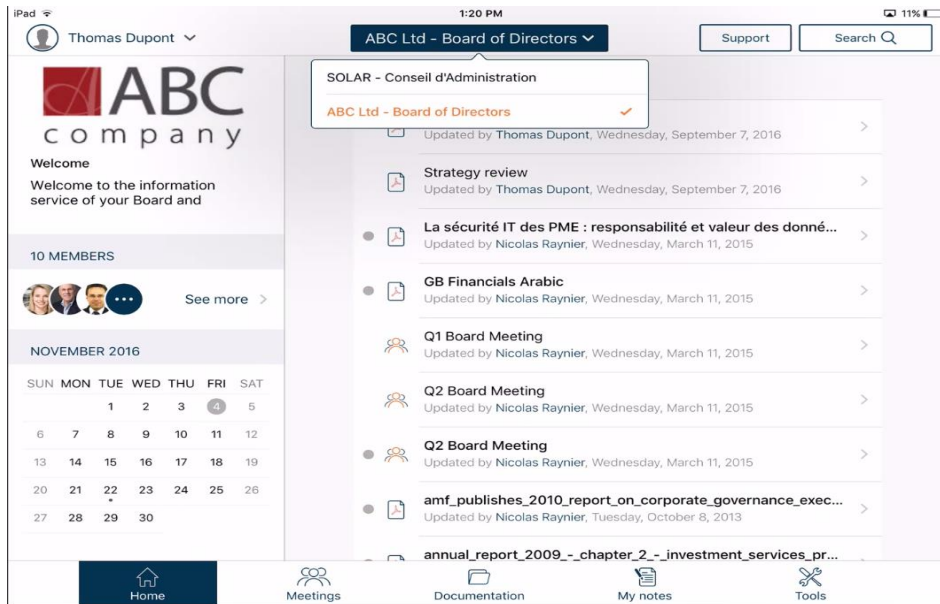
- **My account:** view or change your profile and use this button to logout.
- **Group title:** click on the arrow to change groups (boards or committees).
- **Calendar:** see your upcoming meetings. When the date is orange, it represents a meeting that you have not seen yet. When in blue, it means that you are aware of the meeting. Click on the date and the title of the meeting to open it.
- **Mission :** this is the presentation of the group (underneath the logo).
- **Latest activities:** check out the new items of this group.
- **Members:** find all users in the group as well as their titles. Click on a name to open their profile.

2.1. Browsing

To browse between your boards and committees, click on the arrow next to the group name for a drop-down menu to appear and click on another group you belong to to open it.

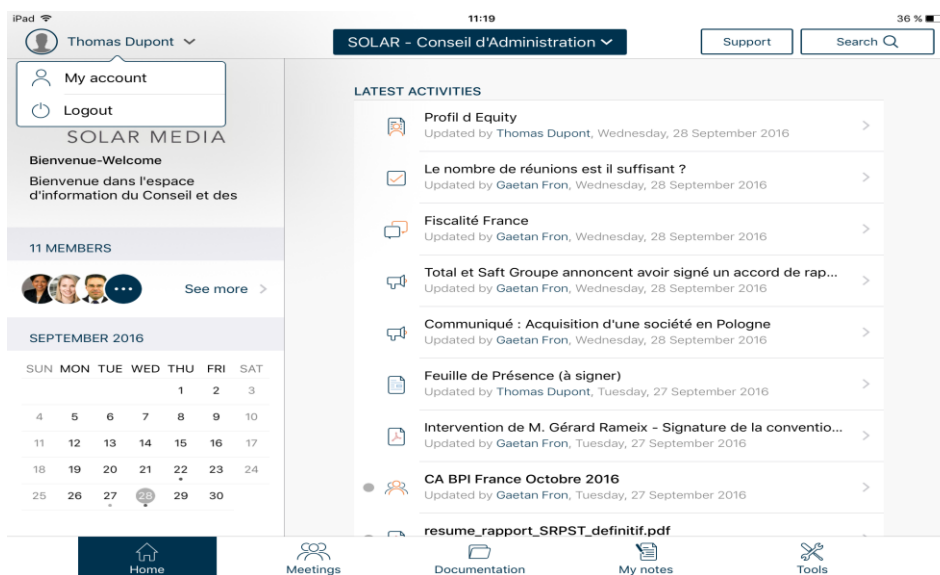
Note: To refresh the content of a group (e.g. if documents were added to the portal), click the name of the concerned group at the top of the screen.

To switch between different areas of a group, use the buttons at the bottom of the screen:



2.2. My account

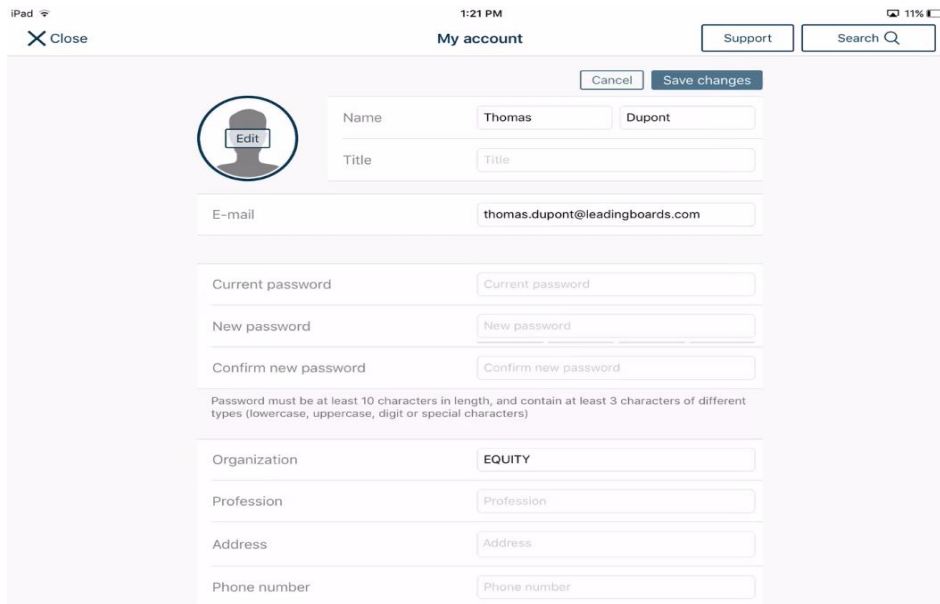
Click on **your name** on the far top left of the screen then on **"My Account"** to view and edit your profile.



To change your information, click on the **"Edit my profile"** button. On this page, you can change any element of your account.

Security problems are often due to a password too easy to guess. Do not use the same password on all of your apps and platforms!

Do not forget to click the **"Save changes"** button at the top right side of the screen once you are done updating your account information.



Click on the « **X Close** » button at the top left of the screen to go back to the home page.

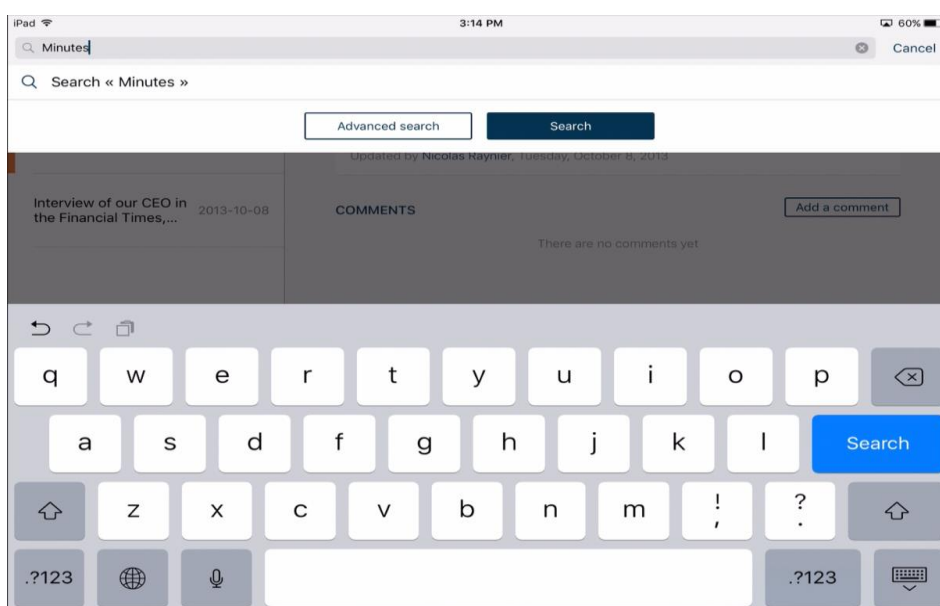
To safely log out of the portal, click **your name** at the top far left of the screen and then on "**Logout**".

2.3. Search

You will notice a "**Search**" bar at the top right side of your screen. This tool allows you to research a word or a serie of words in any type of content that is available to you (Meetings, Documents, Votes, Debates, Wiki Documents, Comments, etc.).

To use it, type in your keyword(s) in the search bar and click on "**Search**".

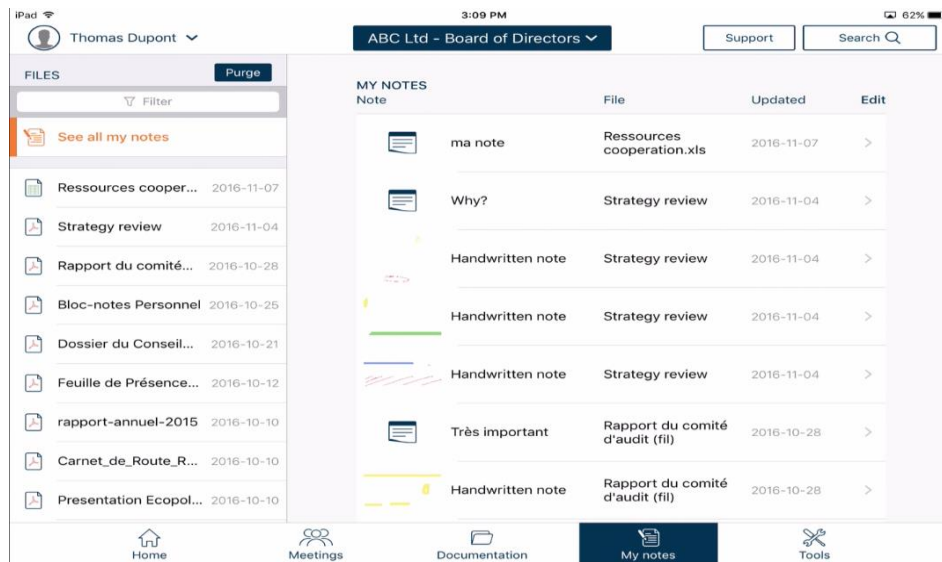
The results will appear under the search bar and show the titles of all the elements and the groups (comittees) they belong to. Click on the title of a document and it will open exactly where your keyword(s) is/are found in the document.



2.4. My Notes

2.4.1. View and edit all notes

Click on the **"My Notes"** button to access all of your annotations. Click on the note to have it open in the document where it was taken. You can search through your notes with the search bar at the top of the list.

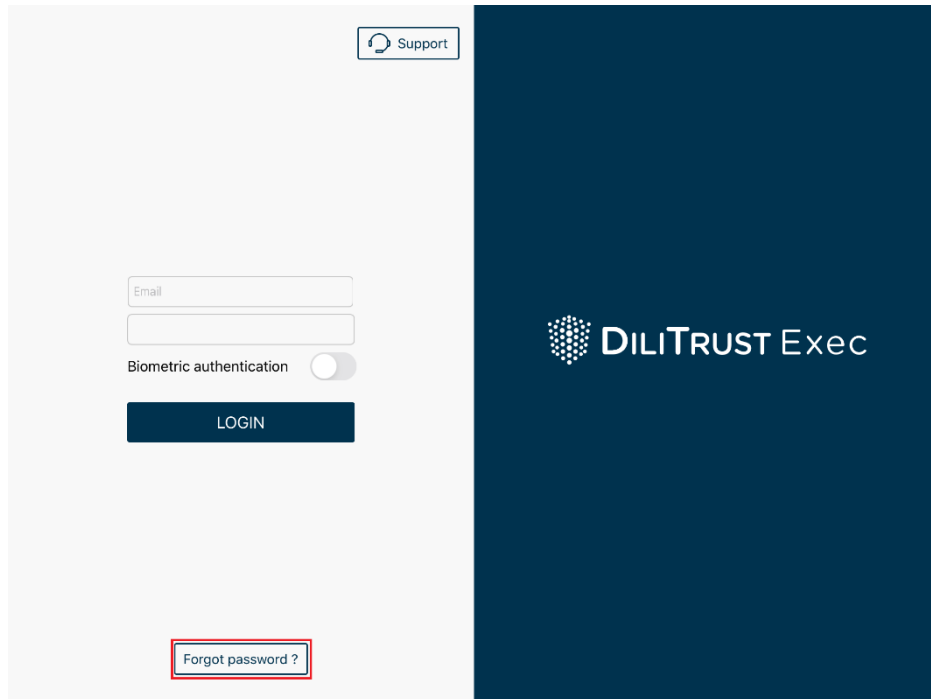


To delete a note, click on **Edit** on top of the notes. You can then select the note(s) you want to delete by clicking on the orange circle next to the specific note and then click on **Delete** at the bottom.

To delete all notes, click on the **"Purge"** button at the top of your list of notes.

2.5. Forgot Password

If you have forgotten your password, click **"Forgot password?"** You will need to enter your user email address or your name in order to receive an email with instructions to create a new password.



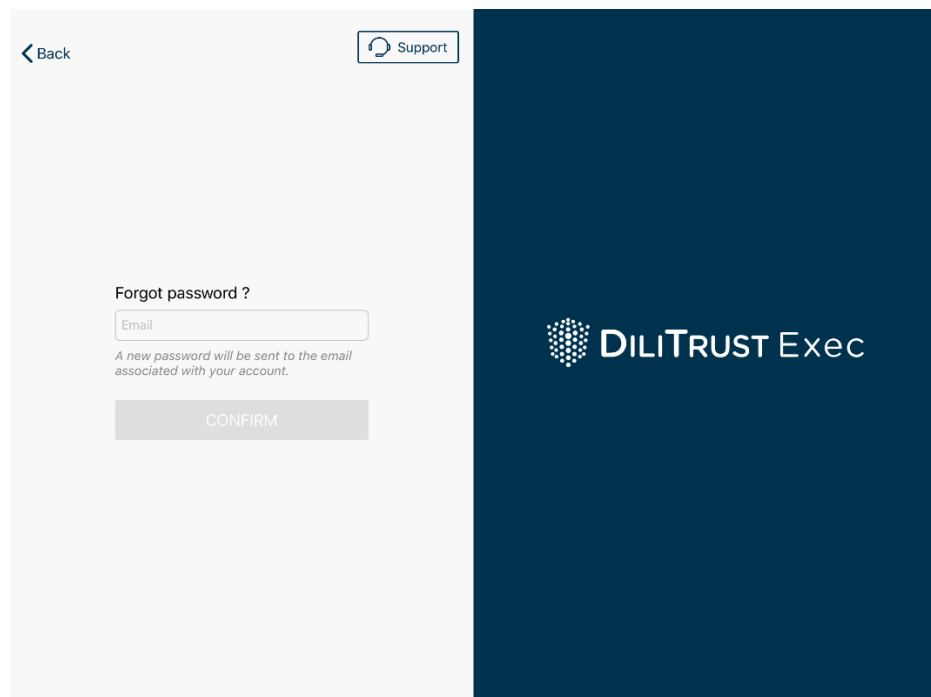
Support

Email

Biometric authentication

LOGIN

Forgot password ?



< Back

Support

Forgot password ?

Email

A new password will be sent to the email associated with your account.

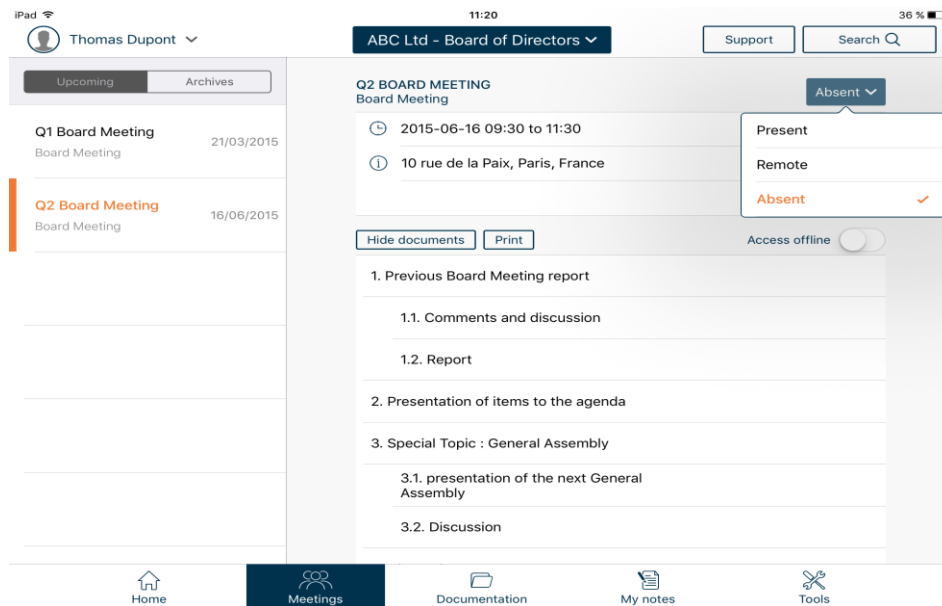
CONFIRM

If you do not receive an email, check that you have entered the correct username or email address and also look in the spam box of your email.

3. MEETINGS

3.1. View your meetings

Click on the tab "**Meetings**" to access all your agendas and board packs.

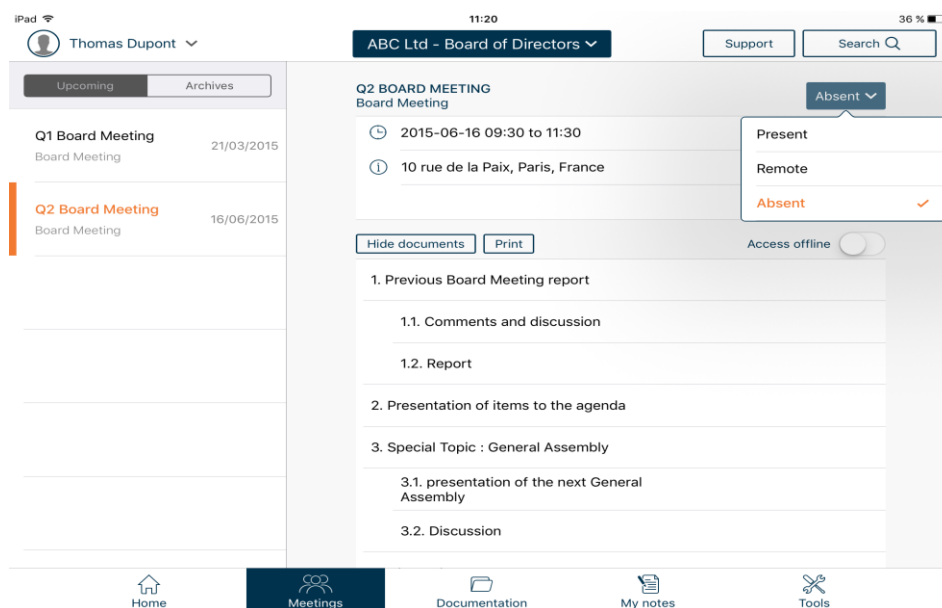


In the left column, you can access your list of upcoming meetings and view your archives by clicking on the corresponding tab.

You can also search among your archived meetings (search by date, title or description) by using the "**Filter**" bar in the "**Archives**" tab.

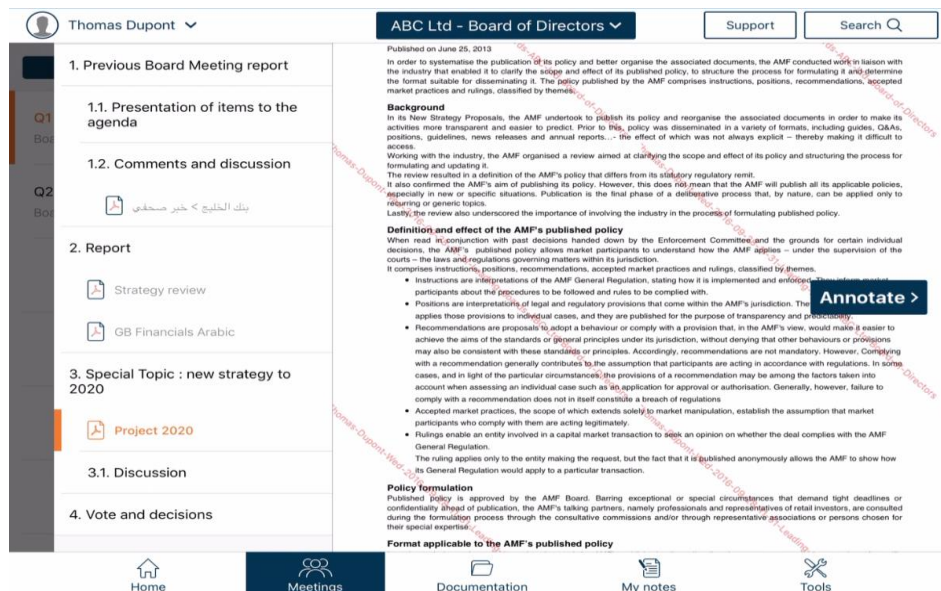
Click on a meeting to select it and its agenda will open on the right.

In the agenda, you will find all the information about the meeting :



- Practical information on the meeting : place, date, time...
- Quorum (RSVP): click on "**Present**" to add your name to the list of attendees or "**Absent**" to inform of your absence; the quorum will be adjusted immediately.

Click the **"See attendees"** button to see who will or will not attend the meeting and also see who has not confirmed their presence yet.
 The documents of each meeting are placed under a corresponding point on the agenda. To see the agenda without documents, you can click on the **"Hide documents"** button.
 To open a document from the agenda, click on its title. The document opens in a new column on the right.



To expand the document and take notes, click the **"Annotate"** button.

Thus, the document opens an overview for the user to browse through the document and take notes (**See IV- Documentation Centre ; b. Annotate a document**).

3.2. Vote online

Some documents will have a vote associated to them. Click on this button next to the name of a document to vote. Select your answer and click on **"Confirm your vote"**. You can cancel your vote by clicking on the button and then click on **"Cancel your vote"**

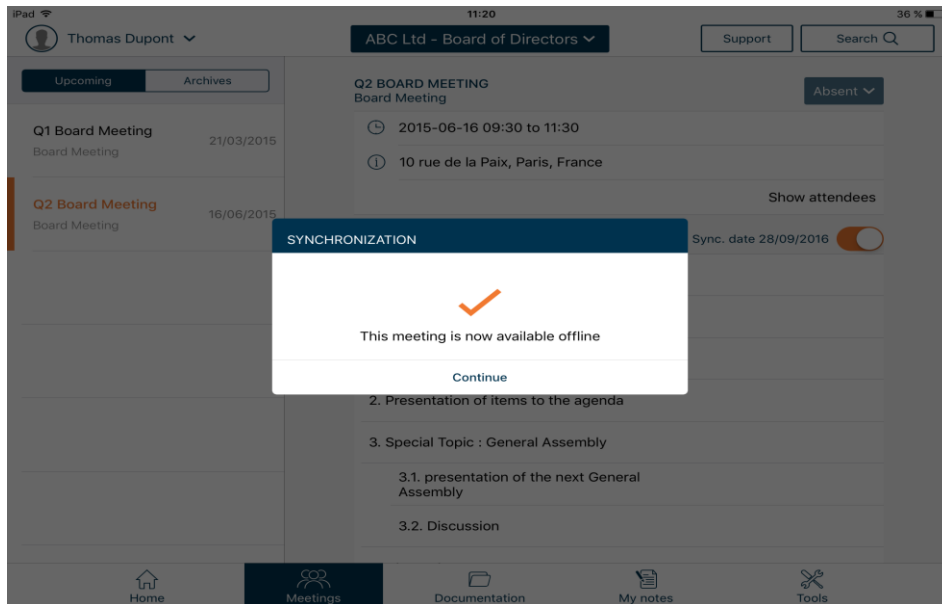
3.3. Synchronizing a meeting for the "offline" mode


The tablet app allows you to view and annotate documents and meetings without an Internet connection. Therefore, to access them offline, you must first synchronize the items on your tablet while connected to the Internet.


3.3.1. Synchronizing a full meeting (agenda and documents)

To sync the meeting, make sure your tablet is connected to the Internet, open the meeting you wish to view offline and click the button right under the **"See attendees"** button.

The following message appear:



Now, instead of the button "**Access Offline**" you will see the date the meeting was last synched:  Sync. date 28/09/2016 

To resynchronize the meeting, if changes have been made for example, you simply have to click on the refresh button  next to the Sync. date.

Note : A synched meeting or document is available offline for a limited time. To change the amount of time the synched item will be available for, you have to go to your tablet settings and go to the DiliTrust Exec settings. In the security options, you will have to select between 24h, 48h, 72h, 15 days or Never (Not recommended).

3.3.2. Opening a meeting offline

When your tablet is no longer connected to the Internet, you can still view the meetings and documents you have synchronized with the above manipulation. Now, in the DiliTrust Exec app, you can only see two buttons at the bottom of the screen : "**Meetings**" and "**Documentation**".

To view the meetings that you have synchronized for the offline access, click "**Meetings**" and if you have more than one synched meeting, open the meeting you wish to view. You can read the agenda, view related documents and add annotations to documents.

Note : You will not be able to vote or to confirm your presence or absence to a meeting when offline.


3.3.3. Update and remove an item

When your tablet is reconnected to the Internet, all the annotations made when offline will automatically be synched on your online portal. **Also**, if an update is made by the admin (time change of a meeting, addition of a document...) you will see it as soon as you are back online.

3.3.4. Remove all data available offline

On the offline tablet application, you can delete all the data available with the "**Delete offline data**" button at the top right side of the screen. This action will erase all items available offline. This will not erase the information on the online portal !

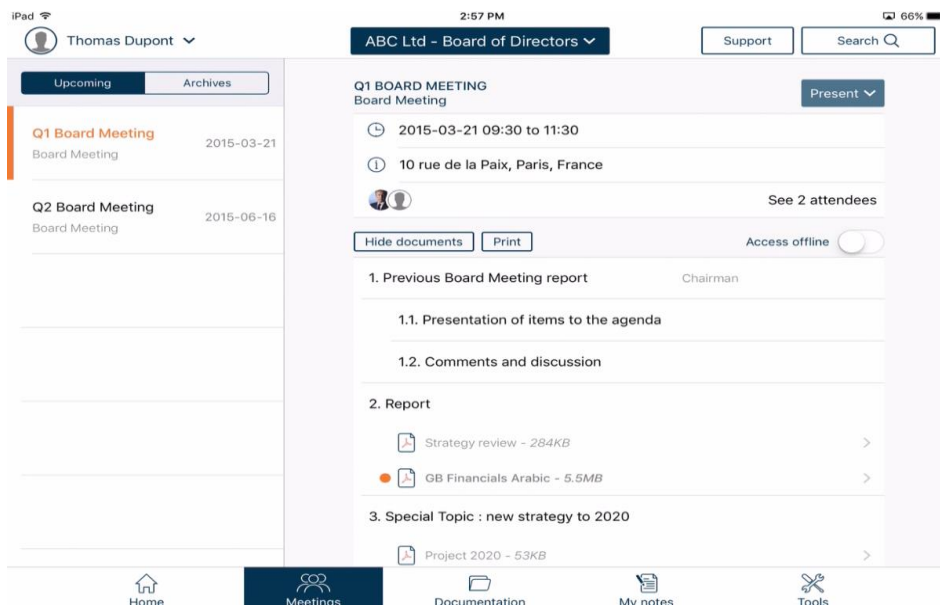
3.3.5. Remove a meeting offline access

You can also manually remove one meeting at the time from the offline mode. To proceed, you have to open the meeting and swipe to the left the "Access offline" button that now shows the date it was last synchronized. 

Note : If you remove a meeting from the offline access, all the attached documents will be removed as well.

3.3.6. Access to the archives of the meetings

To have access to the archives of the previous meetings, you need to click on the « **Meetings** » tab at the bottom of the screen and then click on the « **Archives** » tab above the list of all the ongoing meetings.

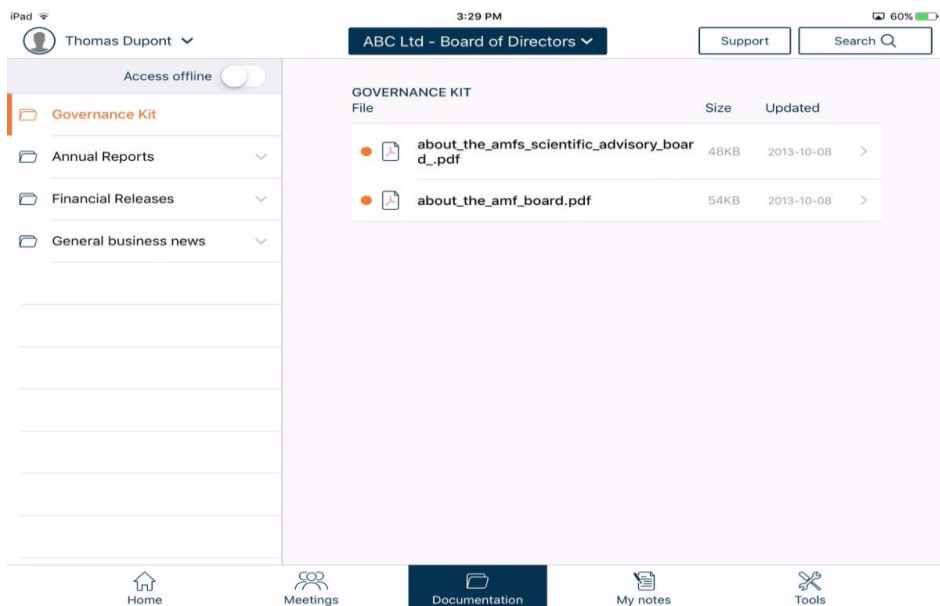


Click on the archived meeting you want to see and the agenda will appear on the right.

4. DOCUMENTATION CENTER








4.1. Access to the documentation center and documents

Click on the tab « **Documentation** » to access all the extra data of your organization. You can navigate easily through your folders to find documents that are not linked to specific meetings. You will notice a gray arrow if there are subfolders in a folder. Click on the folder where the document you are looking for is located (left column) and select the document you wish to view (right column). Click on the document title to open it. You are also able to annotate documents in the Documentation Centre.



4.2. Annotate a document

Once a document is opened to annotate, use the toolbar on the left, to add notes, customize it and zoom it.

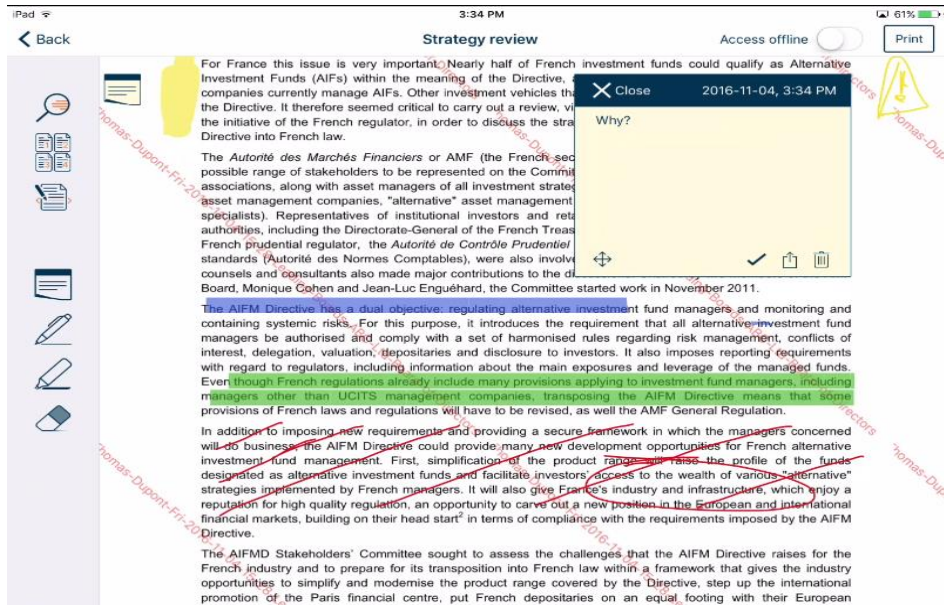
	Go directly to a specific page or search in the document
	Browse through the pages with the document's thumbnails
	You can navigate into all your note in the document
	Add a personal sticky note
	Use the Pen to write with your finger
	Use the Highlighter to highlight with your finger
	Use the Rubber to erase with your finger



Use the Signature option to create a signature and/or place a previously saved signature on a document




When selecting the pen or the highlighter, a palette that lets you choose the color you want to use appears:



4.2.1. Add a sticky note






Once the document is opened, click on the **"Sticky note"** icon in the toolbar to have a blank note appear on the document. Click on it to write on it (you can also write with the *Voice*

Control option of your tablet). When you are done, click on  to save. Click on




to reduce the sticky note to an icon on the document.

4.2.2. View, change or erase a note

- Click on  to open a note.
- If any changes are added to a note, click on  to save them.
- When a sticky note is opened, click and hold the  icon to move the note wherever you want in the document.
- Click on  to delete a note.
- Click on  to close the note.

4.2.3. Share a note

A note is private and attached to a specific document. You can choose to share a note with other users of the group using this icon . A list of users will appear for you to choose

who you wish to share the note with. The recipients will receive an email with a link to go directly to the note.

When a note is shared with other users, it is shared as is. If you make changes on the note later on, the users you shared the note with will **NOT** automatically see the changes. You can share the updated version of the note with them by clicking on the



icon again.

4.2.4. Handwritten notes on a document

Click on the Pen tool  or the Highlighter  , select the color you want to use  and then use your finger to write, draw or highlight on the document. **Use the top bar to stop drawing or highlighting by clicking on "Done".**

Touch done to stop drawing

Done

To zoom in a document, *pinch and spread* : place two fingers on the document and then spread your fingers apart to enlarge the document. To stop the zoom mode click on "**Done**" at the top of the page.

4.2.5. View a document offline

To synchronize a document for offline access, open the document and click the "**Access Offline**" button.

The following message appear: "**This document is now available offline**"



Now, instead of the button "**Access Offline**", you will see the date it was synched and you can click again on the white/orange button to remove the document from the offline mode.

4.2.6. Open a document offline

Without an Internet connection, open the DiliTrust Exec app and click on the "**Documentation**" tab. To open a document, click on its title. Note that all annotations made offline will automatically be synchronized with the online portal when the device is reconnected to the Internet.

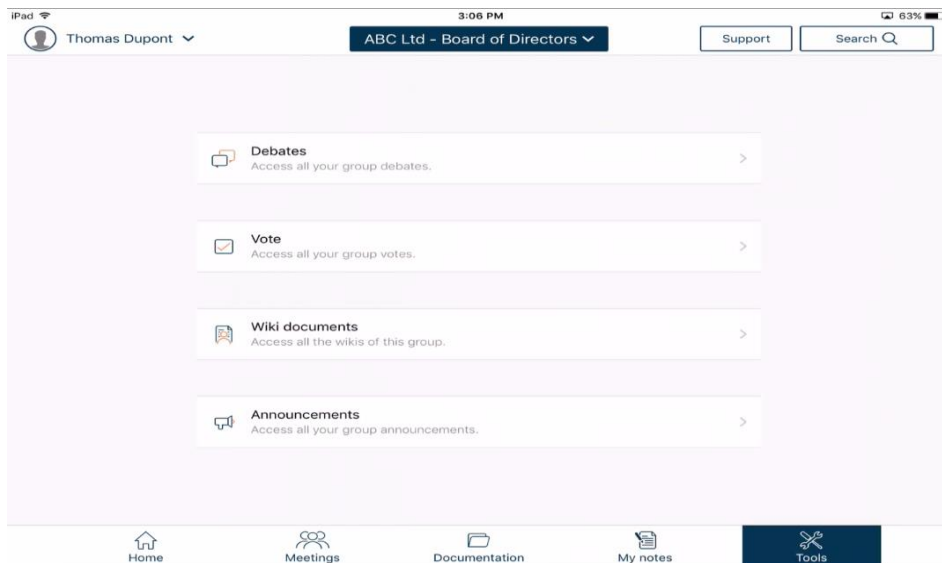
4.2.7. Remove a document from the offline mode

You can remove a document from the offline mode. To do so, you have to click on the "**Documentation**" tab and find the document you are looking for within the folders of your Documentation Centre. Click on the document and then click on the "**Sync. Date**"

button  Sync. date 28/09/2016 .

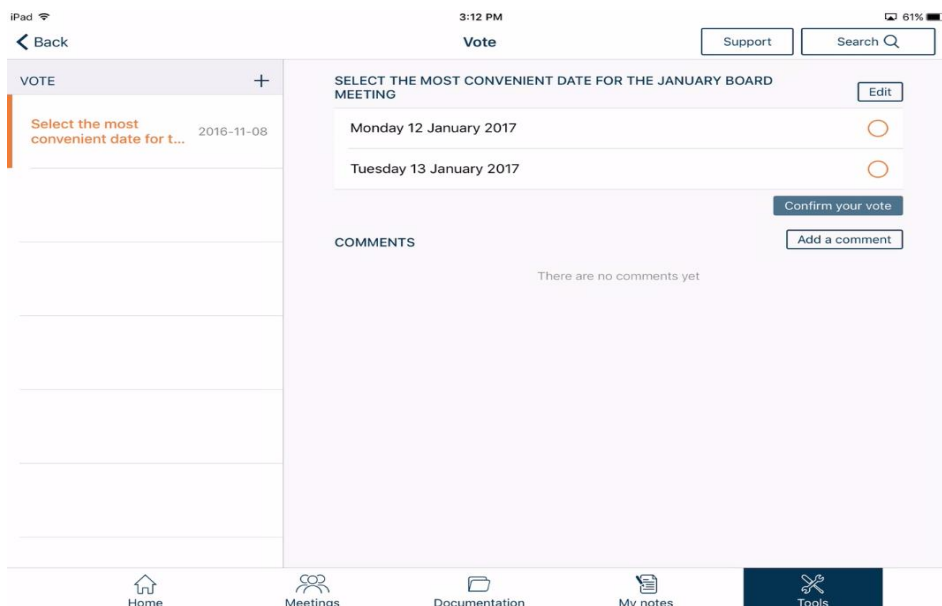
5. TOOLS

In this tab, you have access to collaborative tools.



5.1. Vote

The **"Vote"** tool allows you to quickly collect data and get people's opinion. Click on the title of a Vote in the list to open it. Select your answer and click on **"Confirm your vote"**. Once your vote has been confirmed, the number of votes and percentages will be adjusted automatically. You can comment your choice with the **"Add a comment"** button.



You can cancel your vote by clicking on the button **"Cancel your vote"**. If you want to create a new vote, click on the **+** sign at the top of the Vote list. Fill in the blank with a question and a selection of choices. To offer a wider variety of options, click on the **"More choices"** button and add as many answers as you want.

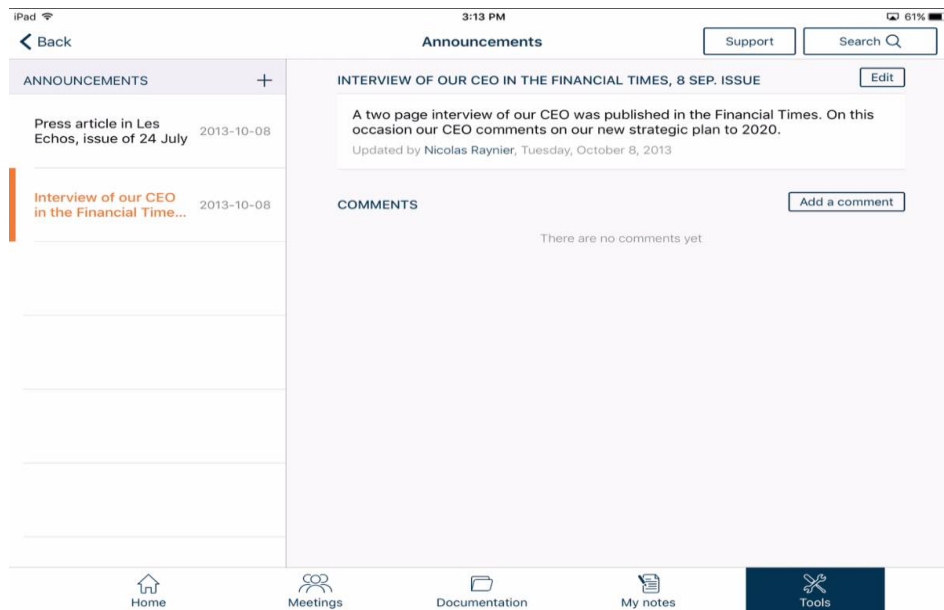
You can also attach a document to the vote and add specific settings in "**Vote Settings**". When you are done customizing your vote, click on the "**Save**" button to publish your vote. If you have to change or add more information to a vote, you simply have to click on the vote you want your changes to affect and then click on the "**Edit**" button at the top right side of the screen.

5.2. Announcements

The "**Announcements**" tool is used to broadcast a message to all members of a group.

Note : The home page only shows the last three posted announcements.

To see an announcement, click on its title.




You can add a comment with the "**Add a comment**" button.

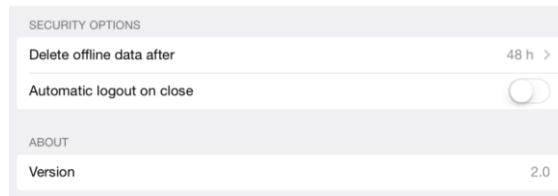
If you want to create a new announcement, click on the **+** sign at the top of the announcements list. Fill in the blanks and click on "**Save**" to publish your announcement

6. SECURITY

6.1. Configure security options




6.1.1. Access to settings on iPad

On the desktop of your iPad, go to "Settings" . In the left column, find the **DiliTrust Exec** application and click on it. The following options will appear:



From there, you are able to change the time that the offline content is available for and also customize your notification settings for the app.

6.1.2. Access to settings on Android

On the desktop of your Android tablet, open the DiliTrust Exec application  and then click on the icon  at the right of the Support icon .

Delete downloaded data after

The removal of downloaded data concerns the documents synchronized on your tablet for offline access.

This means that all the documents that you have synchronized on your tablet will be erased after a certain period of time.

By default, documents are deleted after 48 hours. However, you can change the time and choose between 24 h, 48 h, 72 h or Never.

This is an option that can enhance the security of your documents in case of the loss or theft of your tablet.

Automatic logout on close

Automatic logout is an option that automatically disconnects you from the DiliTrust Exec app when your tablet goes on standby or if you quit the application.

Therefore you must enter your password each time you open the app to enhance security and access to information of your Board.

For example, if you lock your tablet and you leave it unattended, if a third party unlocks and uses your tablet, he cannot connect to the application of DiliTrust Exec without your password, as long as you have not have selected the "Save my information" option.

Also, when your tablet will go on standby, after a few minutes of non-use, when you activate it again, you will have to enter your password to access your Board portal.

7. TECHNICAL SUPPORT

 TECHNICAL SUPPORT AVAILABLE 24/7

 Europe: +33 1 72 18 02 33

 North America: +1 855-923-3117

 support@exec.dilitrust.com