Diligent

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1 Messenger for Android — Updating the app

In order to maintain the maximum level of signature Diligent security, it is critical to use the latest version of Diligent Messenger. This page describes how to enable automatic app updates to ensure that you are always up to date, and also lists the steps for manual app updating.

Enabling automatic updates (Recommended)

1 Open the **Google Play Store** on your device.

2 At the top right of the screen, select the **profile** icon.

3 Select Manage apps & device.

4 Select **Manage > Diligent Messenger**.

5 Select the **icon with three dots** to reveal more options..

6 Enable the Enable auto update option. This option ensures that your device will download updates to Diligent Messenger as soon as they are available, without any further action on your part.

Updating Diligent Messenger manually

1 To update Diligent Messenger manually, open the **Google Play Store**.

2 At the top right of the screen, select the **profile** icon.

3 Select **Manage apps & device**.

4 Locate Diligent Messenger in the list, or find it using the **search** function.

5 Select **Update**.

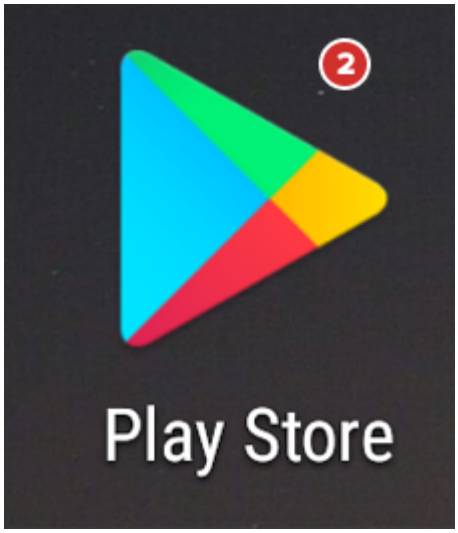
> **Note:** If Diligent Messenger does not appear in the list, or does not have an "Update" option available, you are already using the latest version of the app and do not need to update.

2 Messenger for Android — Installing the application

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

1 To access the Google Play Store, select your device's Apps button to bring up an alphabetical list of all apps installed on your device.

2 Select the **Play Store** icon. You may have to swipe through your apps list to find it.

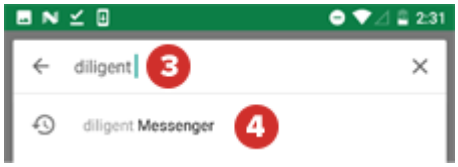


Note: You must have a Google account to download apps from the Play Store, and you may be prompted to enter your Google account credentials upon launch. If you do not have a Google account, follow the link to create one upon opening the Play Store.

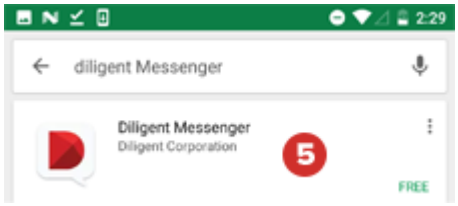
Tip: If you have an existing Google account, but do not remember the password, click here for **Google's self-service password reset website**.

3 In the Search field, start typing the keywords **Diligent Messenger**.

4 A list of results will automatically appear. Select **Diligent Messenger** when it appears in this list.



5 Select the **Diligent Messenger** tile.



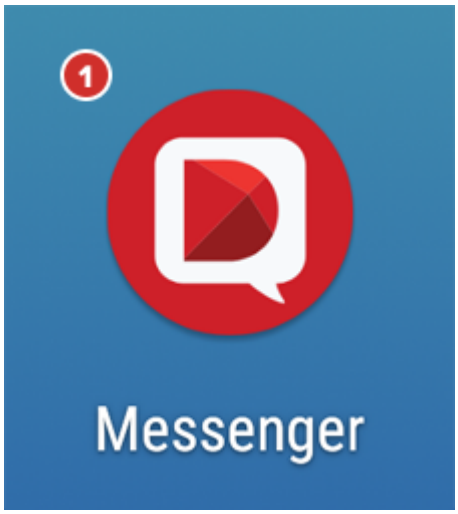
Note: If you created a new Google account and the application did not download automatically, repeat steps 1 through 5, and sign in with your new Google account.

6 Select the **Install** button. If prompted, select Accept on the alert that appears.

3 Messenger for Android — Opening the application

Once you've downloaded Diligent Messenger for Android, you're ready to open the app and sign in to begin communicating securely.

1 Select your device's Apps button to bring up an alphabetical list of all apps installed on your device. If installation was successful, the **Messenger** icon will be on the list; you may have to swipe left or right through the list to see more of it. Select the **Messenger** icon.

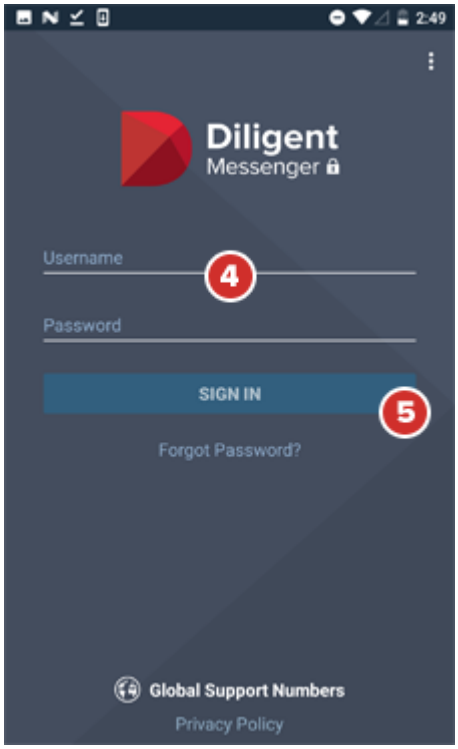


2 The first time you launch the application, you will need to enter the site name for your company. Select the Site Name field and enter your organization's site name.

3 Select **Continue** to proceed to the sign-in screen.

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

5 Select **Sign In**.



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

6 If you are signing in for the first time and are not a Diligent Boards user, you may be prompted to set up your **Security Questions** and **email address**.

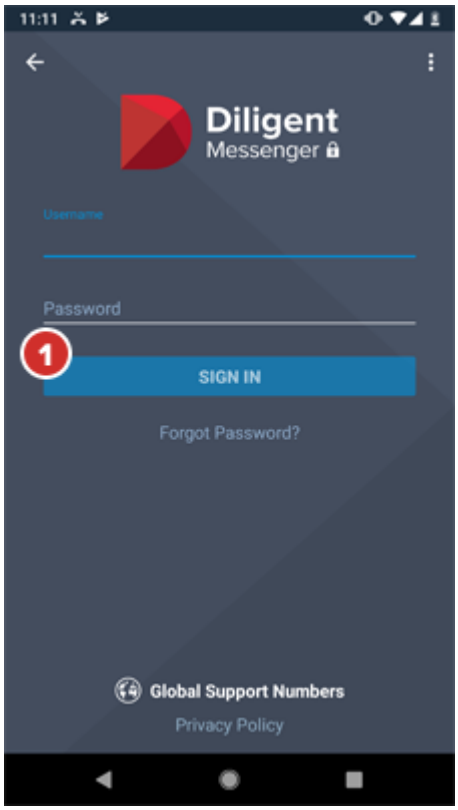
Note: Security questions are used for identification purposes and may be required in the event of a password reset. This dialogue window will appear upon sign-in until all questions on file have been recorded.

Note: If your device and operating system support fingerprint authentication, you may be prompted to enable Fingerprint Unlock by touching your finger to your device's sensor.

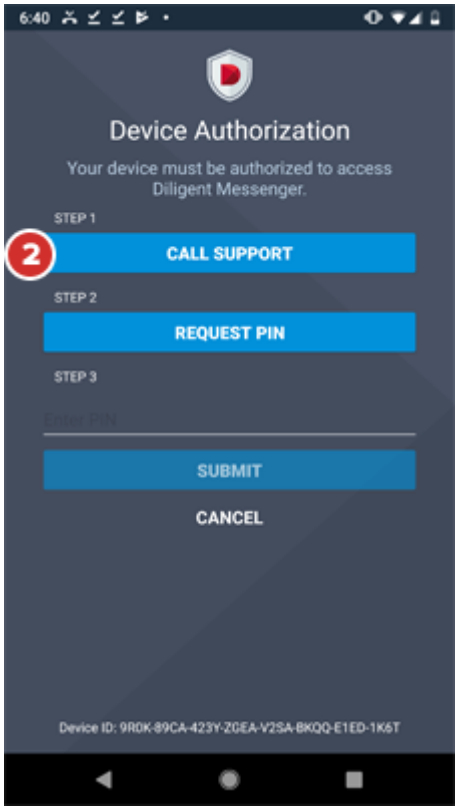
4 Messenger for Android — Authorizing your device

Device Authorization is an advanced security feature that allows your board materials to be accessed only by approved devices. If your administrator has enabled this feature, you will need to have your Android device authorized before using Diligent Messenger.

1 Sign in to Diligent Messenger with your username and password. A window will appear with a Device Authorization message.

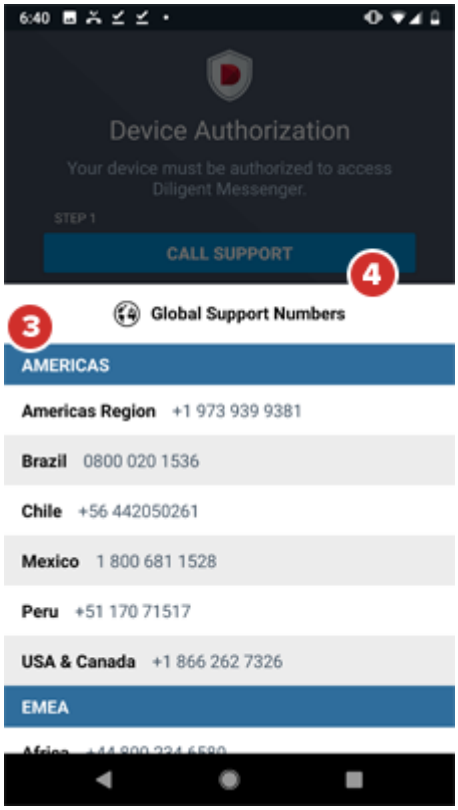


2 Select **Call Support**.



3 A list of Global Support Numbers will appear. On a device with calling enabled, **select the number** for your region to call it. Otherwise, **call** the number for your region manually by phone. The Diligent Global Support representative will verify your identity via your security questions.

4 Swipe down from the top of the Global Support Numbers panel, or select anywhere outside of the panel, to close it and return to the previous window.



5 When directed to do so, select **Request PIN**.

6 Once you receive your PIN, enter it into the **Enter PIN** field.

7 Select **Submit**.

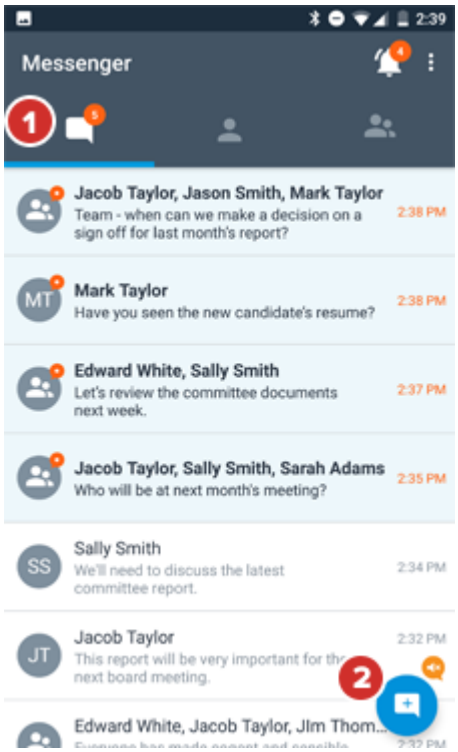
8 Your device is now authorized, and Diligent Messenger will open normally. You will be able to access the app without a PIN in the future.

5 Messenger for Android — Sending and receiving messages

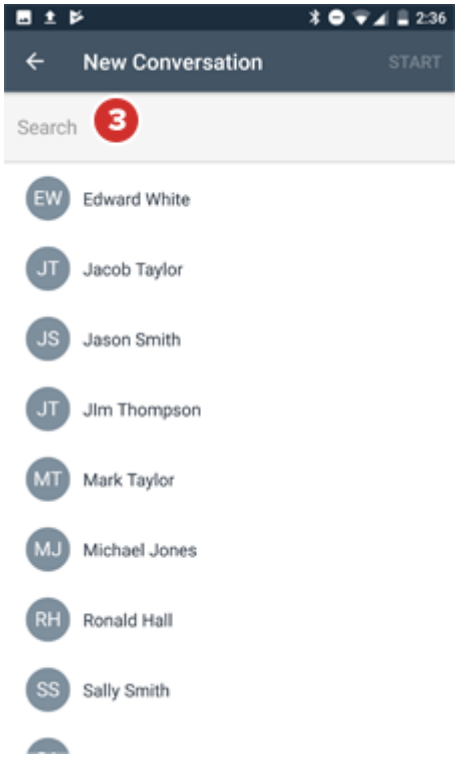
To start conversations with your fellow board members, just send them a message.

1 Once you sign in, you'll be taken to the Conversations hub. You can return to this view any time by selecting the icon at the top of the screen.

2 Select the **Start Conversation** button at the lower right.

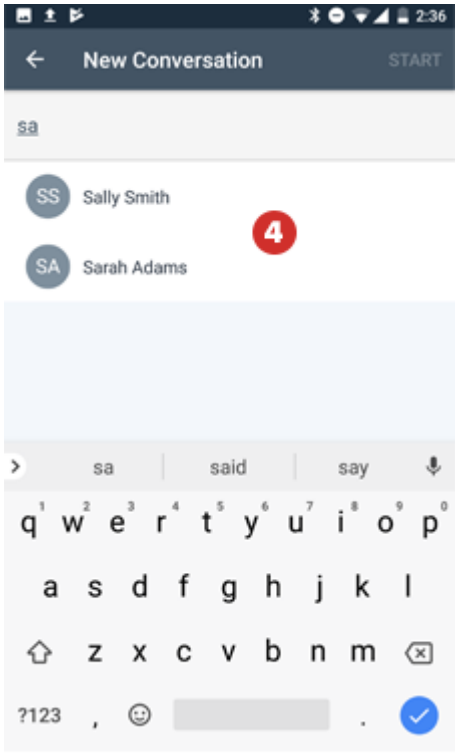


3 The New Conversation screen will appear, with a list of other Messenger users on your site. If you see the name or names you'd like to add to the conversation, select to add them. Otherwise, select the **Search** row and start typing the names of people you would like to add.



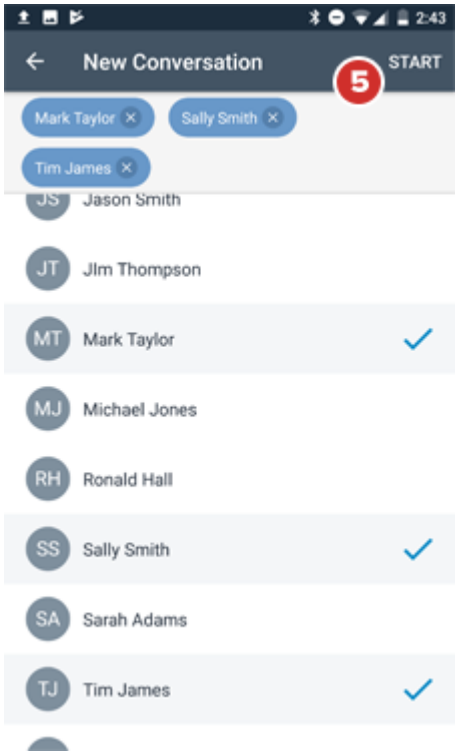
Note: Diligent Messenger will not access your device's contact list. Only other Diligent Messenger users can be contacted.

4 As names appear below this line, select to add them to the conversation. You can then continue typing to search for additional participants.



Note: You can also scroll through the list of contacts and select names to add.

5 After everyone has been added, select **Start**.



Note: To remove a name that you've added, select it twice.

6 Select the **Type a message...** field, and enter your message.

7 When you're done, select the **Send** button to deliver the message. Messages that are sent and received will appear chronologically in a list.

8 The **Status Indicator** at the top right of the message will let you know when your message is being sent and, once delivered, changes to a timestamp.

9 The **Read Indicator** at the bottom right of a message in a one-to-one conversation lets you know when your recipient has signed into Messenger and received the message (indicated by a "Delivered" label), and when they have viewed the conversation (indicated by a "Read" label).

Note: If the message is being sent to multiple recipients, it will indicate how many of them have read the message. Select on the Read Indicator in a group message to see a list of exactly who has (and hasn't) read the

message so far. See Sending messages to committees and groups for more information.

Note: You may draft messages and read received messages while you are offline, but messages will not send until a network connection is established.

10 You can recall a message within two minutes of sending it. Select and hold the message, then select the **Undo** option when it appears. No trace of your message will be visible to the recipient.

Note: Recipients may still see messages in the short time before the “Undo” button is selected.

11 If a message fails to send, it will display a notification. Select the message to access a **Retry** option and attempt to send the message again.

Note: If someone sends you a link to a web page, select it to open your browser and display the page.

12 Select the **Back** arrow to leave a conversation. You’ll be able to return to it later.

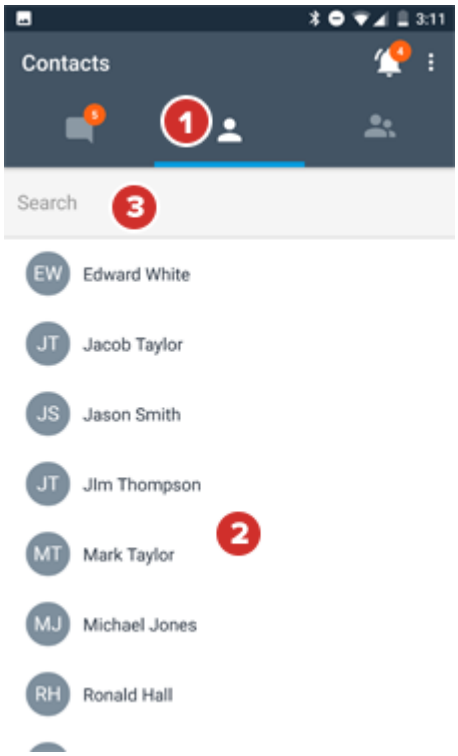
6 Messenger for Android — The Contacts list

Use the Contacts list to start a one-on-one conversation with a fellowboard member.

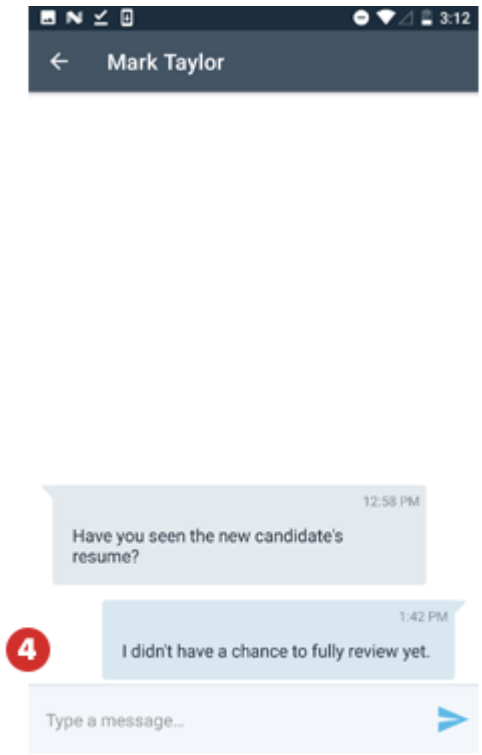
1 Select the **Contacts** icon. Every person at your organization with Diligent Messenger will appear.

2 Select the **Name** of the person you want to contact. This list of people is sorted A-Z, by first name.

3 To find a person's name, select the **Search** bar and start typing it in. Select their name when it appears.



4 When you select a person's **name**, you'll see the messages that you've shared in the past. See Sending and receiving messages for more information on how to send messages to this person — start from Step 6.


3:12
Mark Taylor
12:58 PM
Have you seen the new candidate's resume?
1:42 PM
I didn't have a chance to fully review yet.
4
Type a message...

7 Messenger for Android — Sending messages to committees and groups

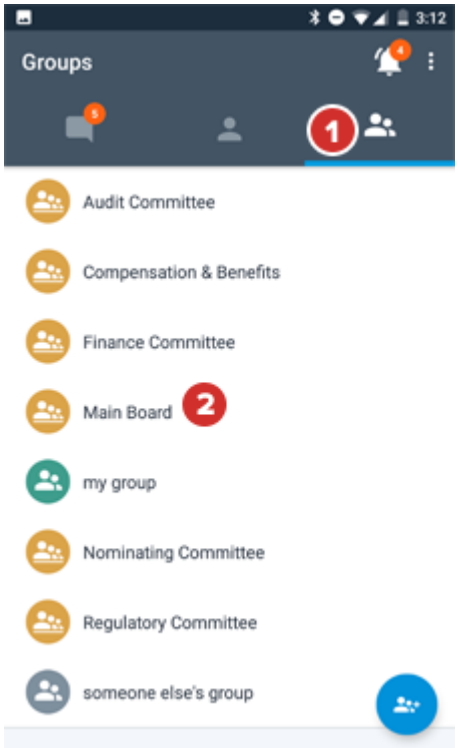
You can send messages to an entire board meeting group at once.

> **Note:** Only Diligent Boards directors, independent directors and executives can send messages to existing board groups. Contact your Diligent Boards administrator if you're not sure how your account is configured.

1 Select the **Groups** icon. A list of your groups and committees will appear.

> **Note:** Custom groups that you have created on other Messenger platforms appear in this list, but cannot be edited or deleted in Diligent Messenger for Android.

2 Select a **Group** name to see and add to that group's in-progress conversation.



3 Select the **Message** field and type in your message to send to the group.

4 When you're done, select the **Send** button. The message will be delivered.

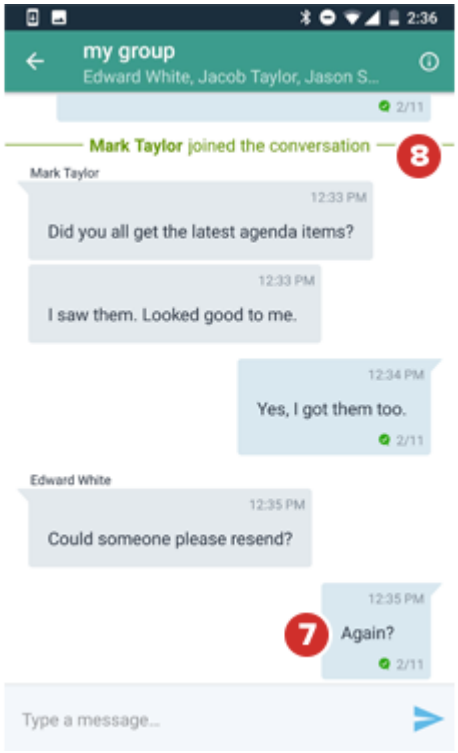
5 The **Status Indicator** lets you know when your message is being sent, and, once sent, changes to a timestamp. This indicator also shows whether a message has failed to send.

6 The **Read Indicator** at the bottom right of the message lets you know how many recipients have read the message. Select the **Read Indicator** in a group message to see a list of who has read the message so far (indicated by a "Read" label) and who has signed in to Messenger in the time since the message was sent, but has not yet viewed the conversation (indicated by a "Delivered" label).

7 Just like one-to-one conversations, you can recall a message to a group within two minutes of sending it. Select and hold the message, then select the **Undo** option when it appears. No trace of your message will be visible to the recipient.

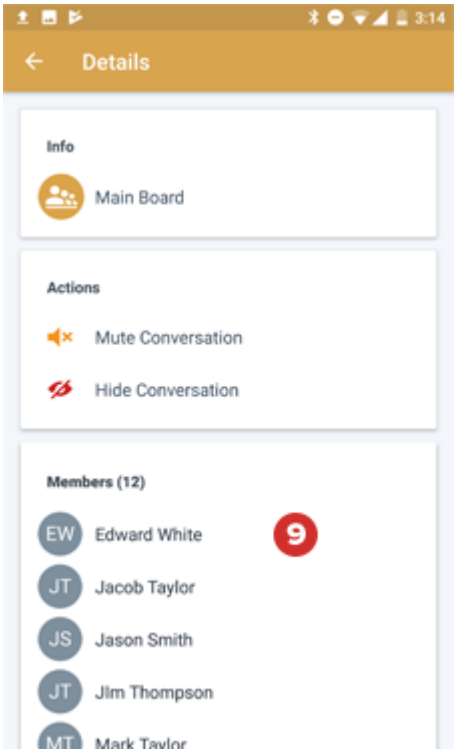
Note: Recipients may still see messages in the time before the "Undo" button is selected.

8 When a user is added to or removed from a custom group, a **notice** will appear.

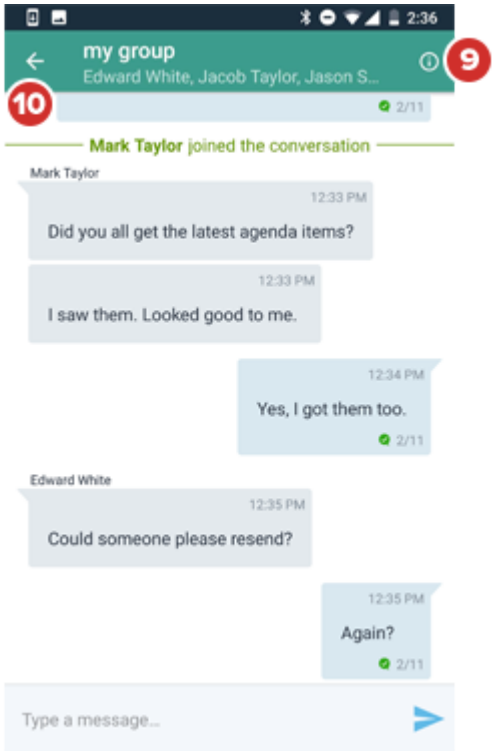


Note: This functionality is only present for custom groups (green or gray icon), not board committees (gold icon).

9 Select the **Details** icon to see a list of the people you are conversing with. These people will be able to see your texts.



10 Select the **Back** button to return to the previous screen.

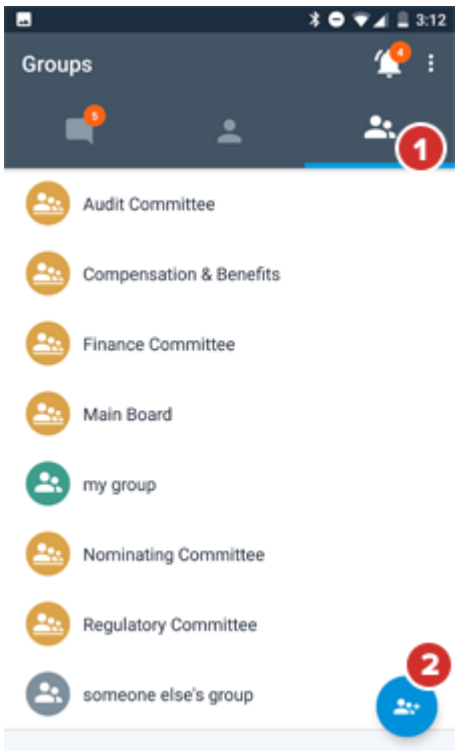


8 Messenger for Android — Creating custom groups

Creating a custom group allows you to hold an ongoing discussion with a set group of people, without it getting lost in your conversations list.

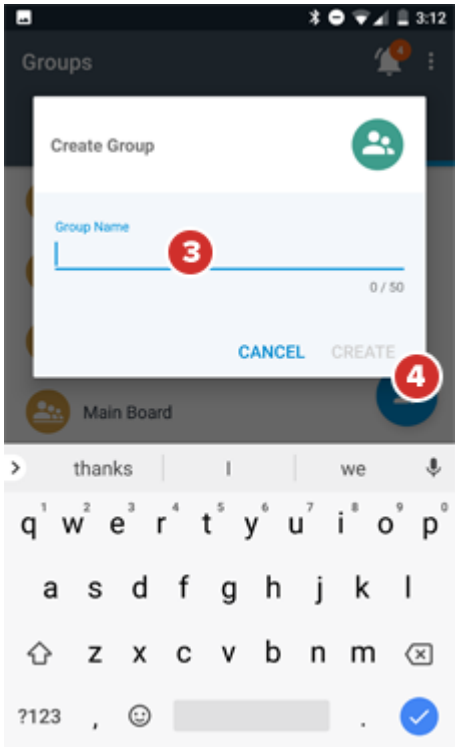
1 Select the **Groups** icon. A list of your groups and committees will appear.

2 Select the **Create Group** button at the lower right of the screen.



3 Enter the **name** of the group.

4 Select **Create**.



5 Start selecting the names of the people you wish to add to the group, or, in the **Search** field, start typing a name. As names appear below this line, select them to add them to the group.

6 Select **Save**. The custom group will immediately be usable by all members, and will behave just like a committee or meeting group.

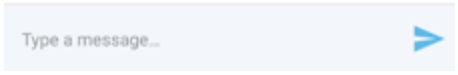
7 Custom groups you have created will appear in your groups list with a green icon.

8 Custom groups that others have created (and that you are a member of) will appear in your groups list in gray.

9 Messenger for Android — Editing or removing a custom group

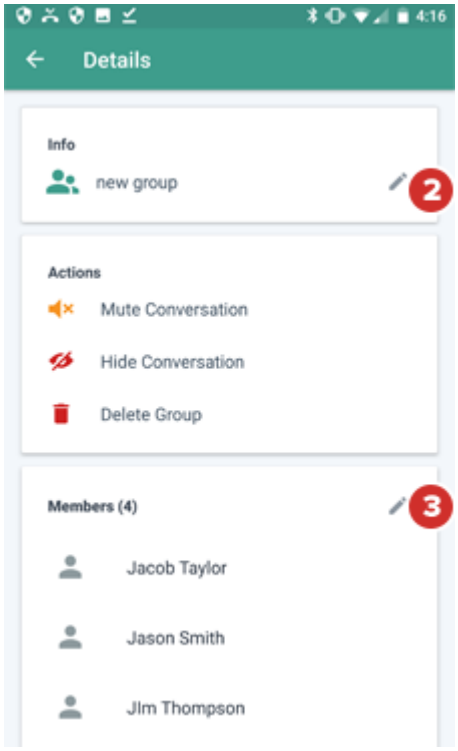
Custom groups can be renamed as necessary, or modified as members are added and removed. You can also delete a custom group that you've created.

1 In a custom group that you've created, select the **Details** icon at the top right.



2 To change the name of the group, select the **Edit** button near the group name. Type in the new name for the group, then select **Save**.

3 To change who is in the group, select the **Edit** button for the Members list.

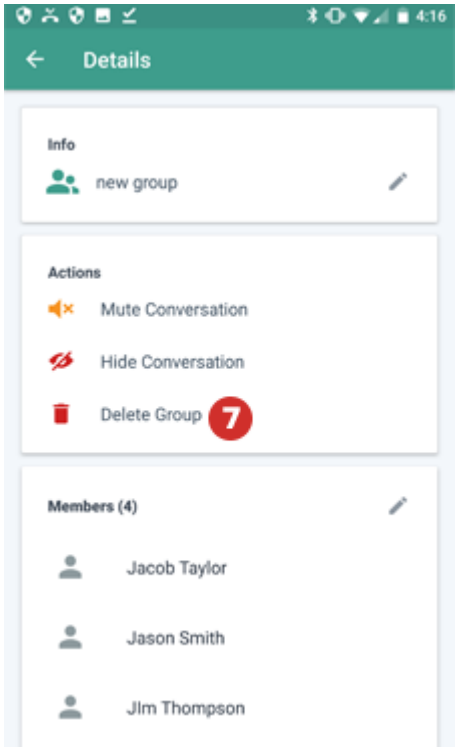


4 To add a member, start typing their **name** in the Current Members field, or just scroll and select to add names from your full organization list.

5 To remove a member, select their **name** in the Current Members field twice, or, if you see their name in the list below, select it once. Removed members will no longer see the group in the group list, but all remaining members will still have access to the removed person's texts.

6 When your edits are complete, select **Save**.

7 To delete a custom group that you have created, select the **Delete Group** button on the Group Details screen. This will remove all content in the conversation, and remove the group from the groups lists of all members.


4:16
Details
Info
new group
Actions
Mute Conversation
Hide Conversation
Delete Group
7
Members (4)
Jacob Taylor
Jason Smith
Jim Thompson

10 Messenger for Android — Recent conversations

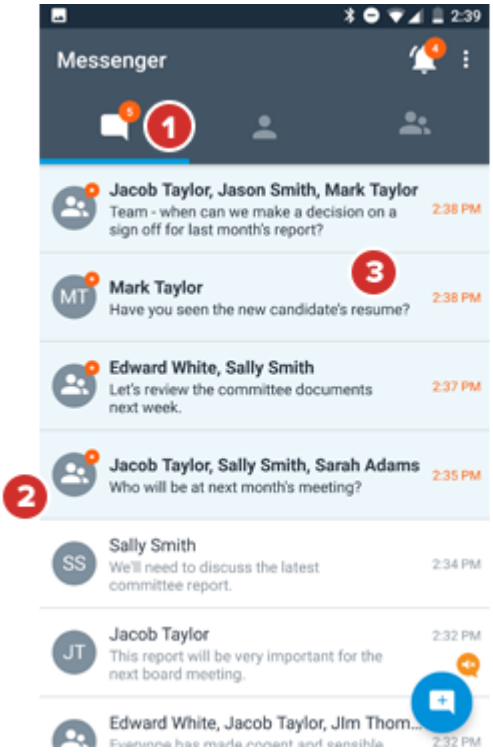
A list of recent conversations lets you continue talking right where you left off.

1 Select the **Conversations** icon. A list of your conversations will appear, with the most recent conversation at the top. A bubble containing your number of unread messages (if any) also appears on this icon.

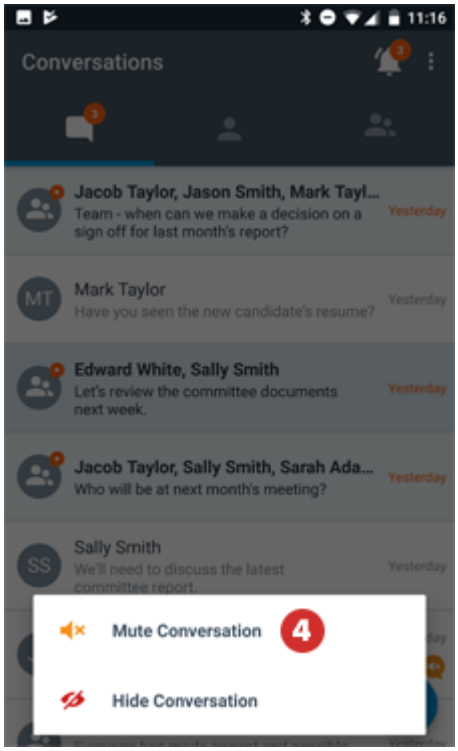
Note: You will also see this list of conversations when you sign in.

2 Conversations that contain messages you haven't read yet will be designated with an **unread indicator**, and also appear with a color highlight and names in bold.

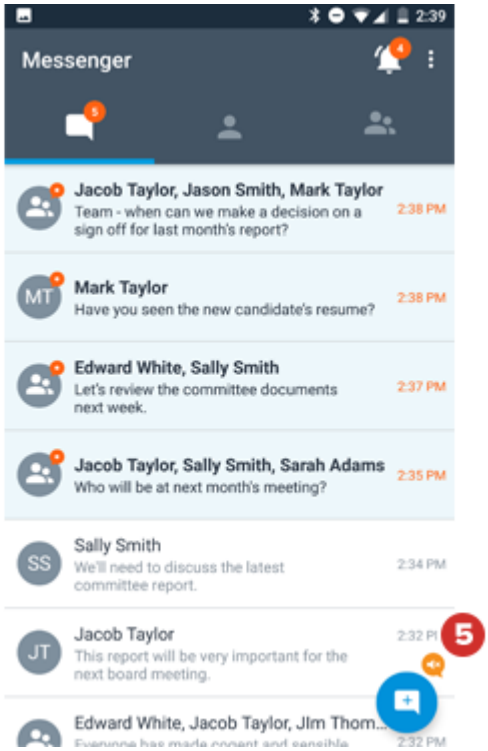
3 Select any **conversation** in the list to continue the discussion.



4 Select and hold on a conversation in the list to access more options. The **Mute Conversation** option puts a conversation into a "do not disturb" mode. Muted conversations will not display notifications and alerts when new messages are received, though the badge number on the icon will still increase.



5 Select and hold a muted conversation and choose the **Unmute Conversation** option to start receiving notifications for that conversation again.

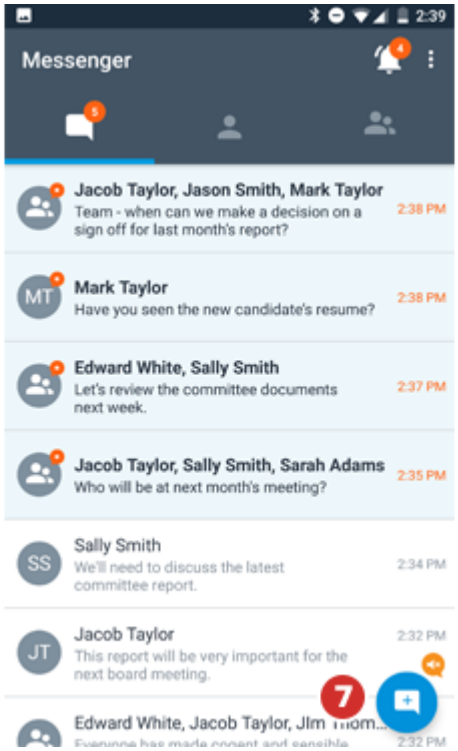


6 To hide a conversation from the list, select and hold it, then choose the **Hide Conversation** option. The conversation will no longer appear in the list until someone sends a new message, at which point it will reappear.

Note: You can also use the “Conversation Details” and “Group Details” menus to mute, unmute, and hide conversations.

Note: The “Hide” and “Mute” functions apply across all supported platforms, so a conversation that you hide on Android, for example, will also be hidden when you sign into Diligent Messenger for Web.

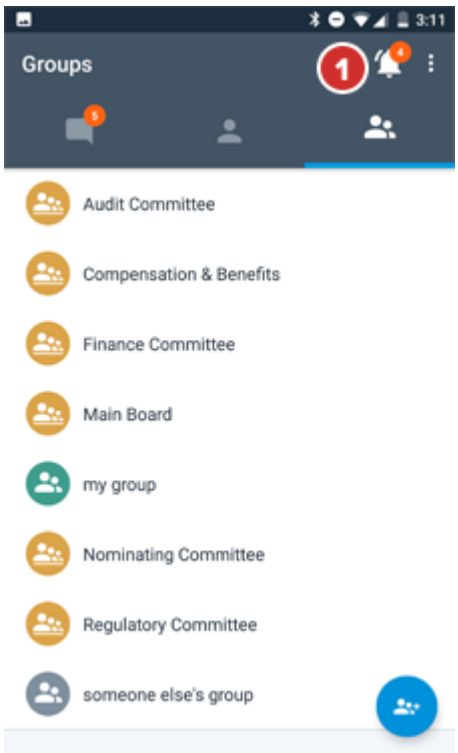
7 To start a new conversation, select the **Start Conversation** button at the lower right. See Sending and receiving messages for more information.


2:39
Messenger
Jacob Taylor, Jason Smith, Mark Taylor
Team - when can we make a decision on a sign off for last month's report?
2:38 PM
MT
Mark Taylor
Have you seen the new candidate's resume?
2:38 PM
Edward White, Sally Smith
Let's review the committee documents next week.
2:37 PM
Jacob Taylor, Sally Smith, Sarah Adams
Who will be at next month's meeting?
2:35 PM
SS
Sally Smith
We'll need to discuss the latest committee report.
2:34 PM
JT
Jacob Taylor
This report will be very important for the next board meeting.
2:32 PM
7
2:32 PM

11 Messenger for Android — Receiving announcements from Diligent Boards

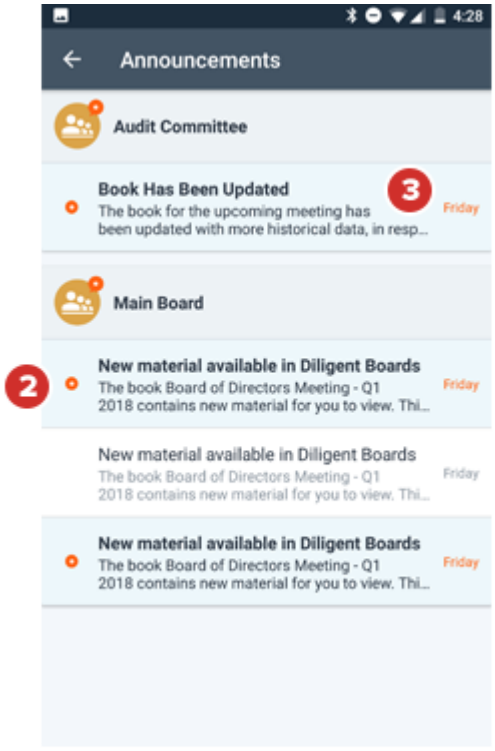
If you use Diligent Boards, your administrator can send you announcements about new board content directly via Diligent Messenger.

1 Select the **Announcements** icon. A list of any of your meeting groups with announcements will appear. If you have any unread announcements, a bubble will appear on the Announcements icon showing how many there are.

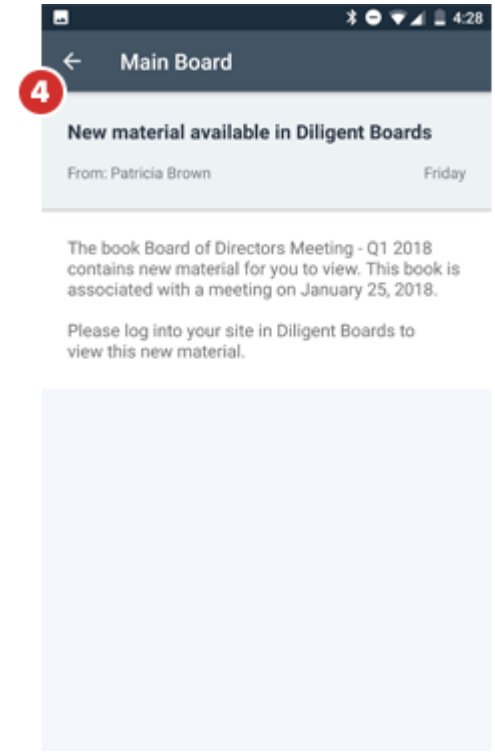


2 On the Announcements screen, unread announcements are indicated with a **Red Dot**.

3 Announcements appear in a list organized by meeting group, with the group containing the newest announcement (whether read or unread) at the top. Select an announcement to see the entire message. Announcements will inform you if a new book is available in Diligent Boards, or if a book has been updated.

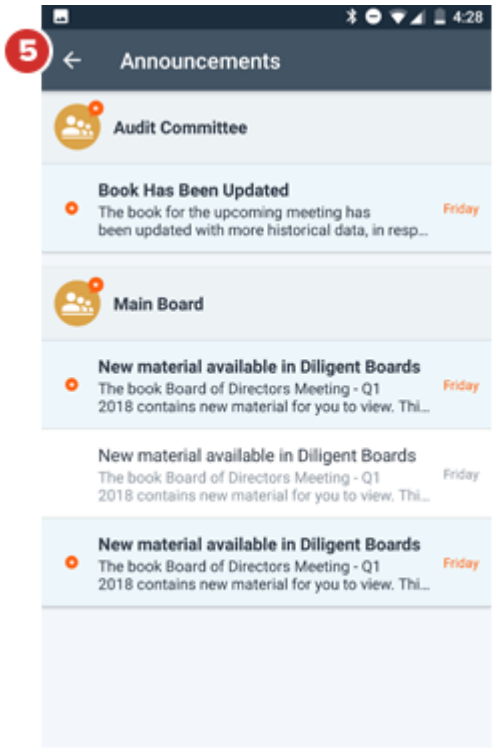


4 While reading an announcement, select the **Back** button to return to the full Announcements list.



Note: You cannot reply to announcements.

5 Select the back button in the Announcements screen to return to your last hub.

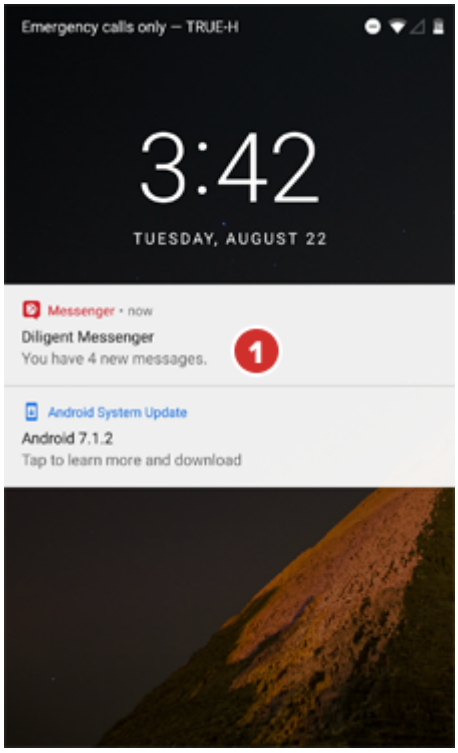


Note: If your administrator sent an announcement to multiple board groups at once, you may receive multiple copies of the same announcement in different group lists.

12 Messenger for Android — Notifications and alerts

When you get new messages, Diligent Messenger will alert you to them in a variety of ways.

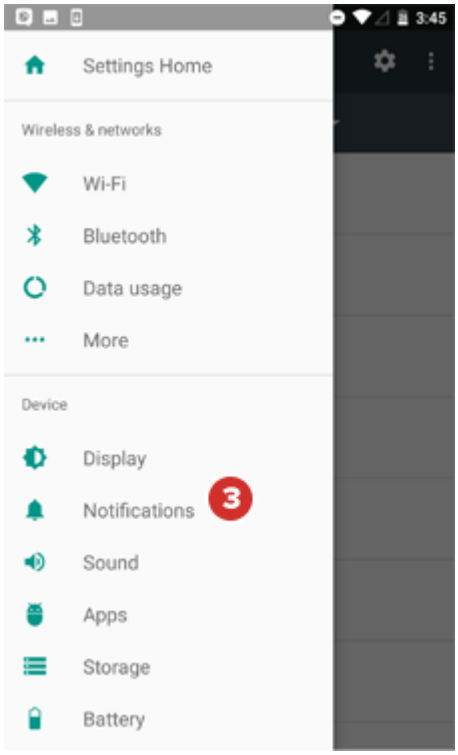
1 If your device is locked, a **Notification** will appear on your lock screen when you receive a new message or announcement. If your device is unlocked, this notification could appear as a banner or as a window.



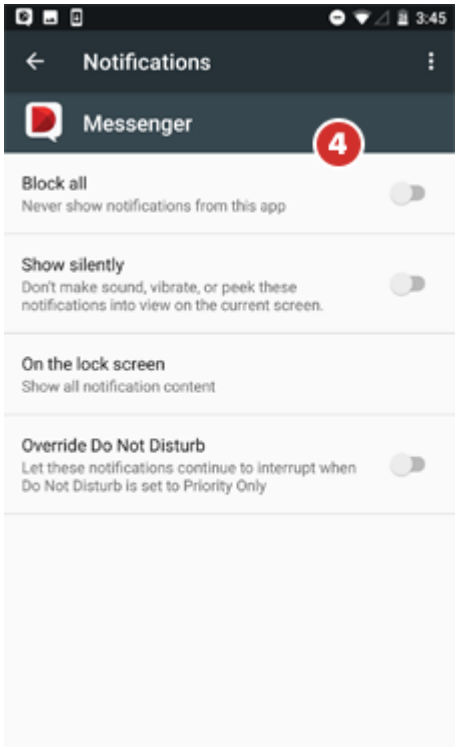
Note: You can block notifications from specific conversations using the "Mute" feature. Refer to Recent conversations more information on muting.

2 To change the appearance of notifications on your device, select the **Settings** icon on your home screen.

3 In the menu that appears, select **Notifications**.



4 Select Messenger from the alphabetical list that appears. You'll be presented with **options** that change the way Diligent Messenger presents notifications; for example, disabling sound alerts, or what types of notifications appear on the lock screen. The specific notification options available to you may depend on your device and Android operating system.



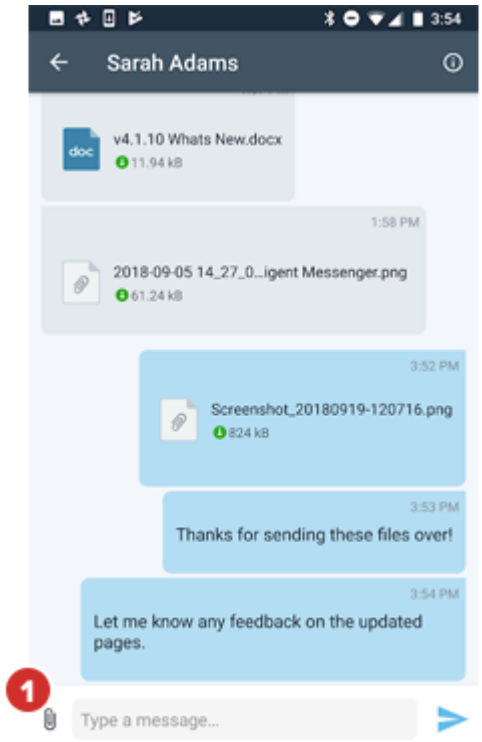
Note: Depending on your site settings, you may also receive email notifications of unread messages and announcements after a designated time. Contact your administrator or Customer Success Manager for more information.

13 Messenger for Android — Sending attachments

Sending a file as an attachment lets you share a variety of content types with other people or groups.

> **Note:** The ability to send attachments is optional. Contact your Customer Success Manager to disable or enable this feature.

1 Select the **Attach** button to the left of the "Type a message..." field.



2 Your device's file selection interface (which may appear differently than the screenshot shown here) will open. Locate and choose the file you wish to send. Diligent Messenger supports the following file types:

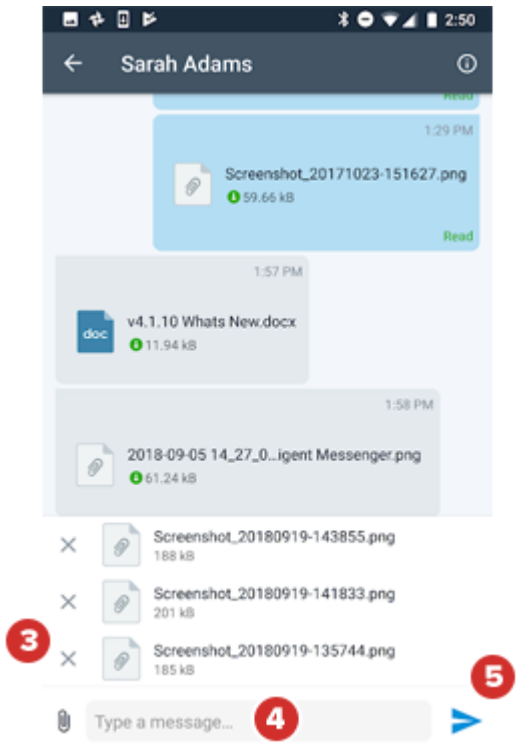
- **Photo and image files**
- **Adobe PDF documents (.pdf)**
- **Microsoft Word (.doc, .dot, .docx, .docm, .dotx, .dotm, .rtf)**
- **Microsoft Excel (.xls, .xlt, .xlsx, .xlsm, .xltx, .xltm, .xlsb)**
- **Microsoft PowerPoint (.ppt, .pot, .pps, .pptx, .pptm, .potx, .potm,.ppsx, .ppsm)**

3 An attachment icon will appear above the “Type a message...” field. To remove an attachment, select the **X** next to its icon.

> **Note:** To attach additional files, repeat steps 1 through 3. Any combination of photos and documents can be attached to a message.

4 Select the **Type a Message...** field and type in a message that will be sent with your attachment. You can also leave this field blank.

5 When you’re done, select the **Send** icon. The attachment will be delivered.

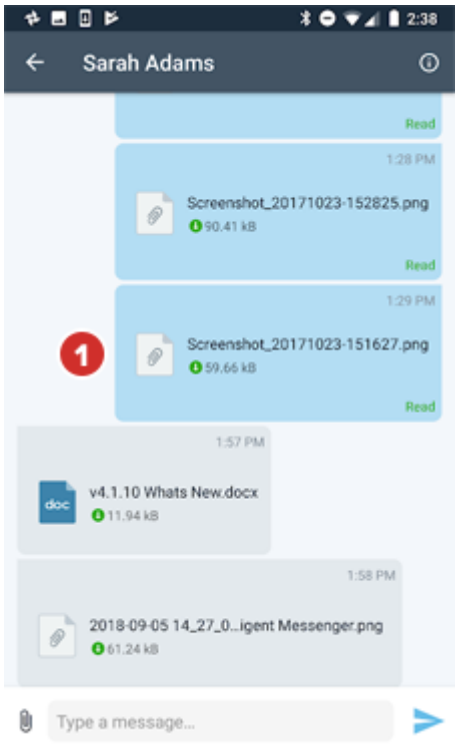


> **Note:** If you sign out or lock the app while the attachment is being sent, the transfer will be canceled.

14 Messenger for Android — Receiving and exporting attachments

Attachments that have been received from others can be viewed in Diligent Messenger, or exported for use in other apps.

1 If you receive an attachment, select its **icon** to download the file to your device.



Note: You'll also receive notifications for attachments. These will appear identically to the notifications for new messages.

2 Once the file is downloaded, it will open automatically for viewing. Scroll through the document to view it.

Note: Attachments that you've successfully downloaded will appear with a small green icon under the file name. These attachments can be viewed even if you're offline.

Note: If the file type cannot be opened using an application on your device, you will be asked if you would like to open the Google Play Store to find an app.

3 Depending upon the file type, the app in use and your device, you can use the **Share** button to print or email the document, or to export it to another app.

Note: If the "View-Only Attachments" security feature is enabled for your site, sharing and exporting options are not available, providing an additional layer of control to files sent among members of your organization. When this feature is enabled, attachments can only be viewed within the Diligent Messenger app and cannot be saved or viewed externally.

The apps that appear in the Share list will change depending on which apps are installed on the device. The behavior of the export will depend on the app. For example, if you select a mail application, the document will be attached to a blank email.

4 Select **Back** to close the document and return to Messenger. Select the attachment icon again to re-open it.

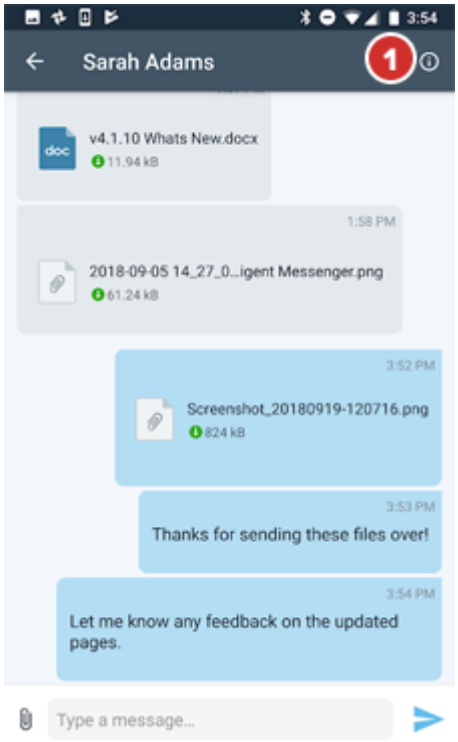
Note: Attachments will expire on the same schedule as messages; contact your site administrator or Diligent for more information on your organization's expiration scheduling. If you are removed from a group, you will

also lose access to attachments sent to that group.

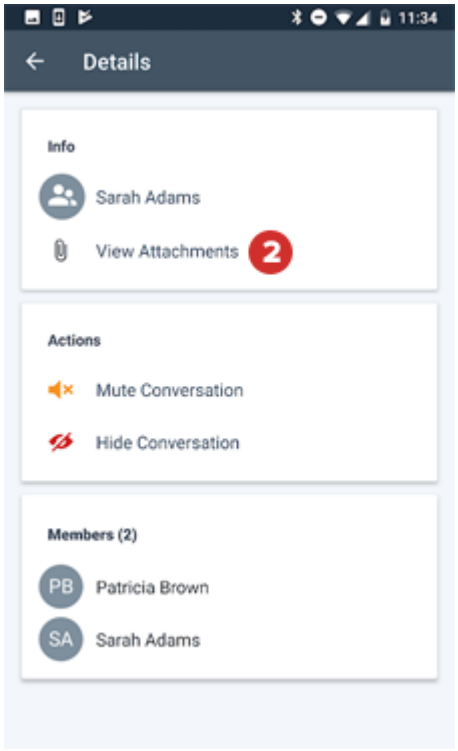
15 Messenger for Android — The Attachments list

The Attachments list provides a searchable overview of all attachments that have been sent and received in a conversation.

1 To access the Attachments List, first, select the **Details** button in a conversation.



2 Select **View Attachments**.

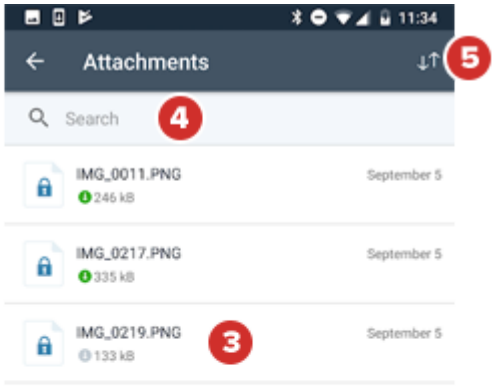


3 A list of all attachments that have been sent and received in the current conversation will appear. Select an **attachment** in the list to view it. By default, attachments are listed from newest to oldest.

Note: Attachments that have expired in accordance with your organization's expiration scheduling are no longer available, and do not appear in the list.

4 Enter a term in the **Search** box to search and return results from all available attachment file names and extensions within the current conversation.

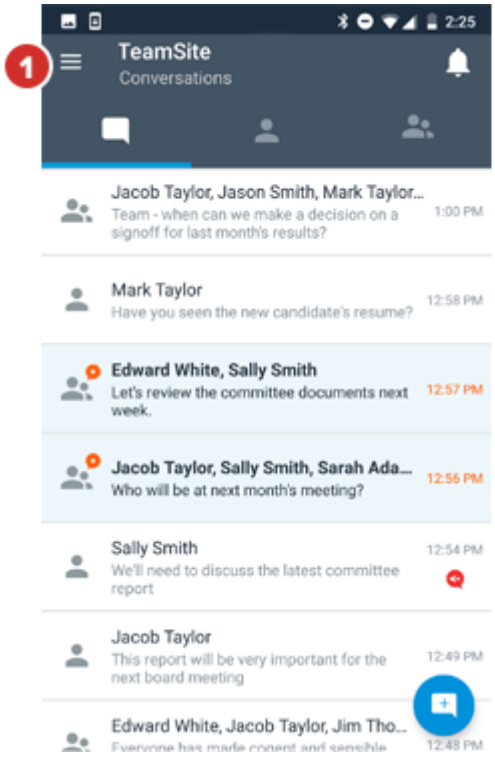
5 Select **Sort** to access sorting and filtering options for the list of search results. Select an option to apply it.


11:34
Attachments
5
Search
4
IMG_0011.PNG
246 kB
September 5
IMG_0217.PNG
335 kB
September 5
IMG_0219.PNG
133 kB
3
September 5

16 Messenger for Android — Changing sites

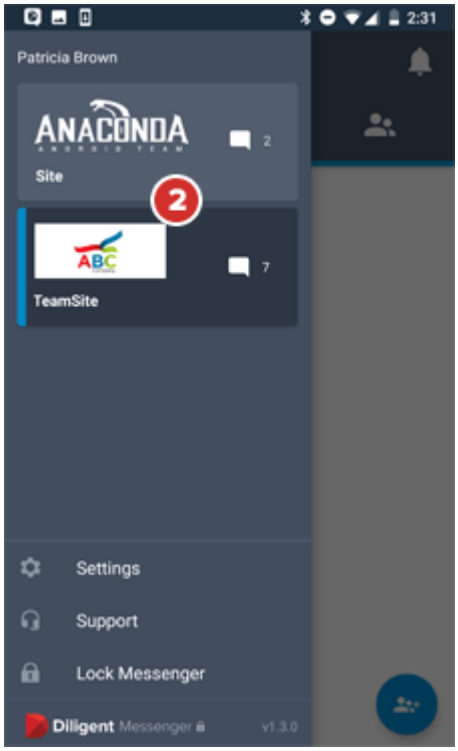
If you belong to more than one Messenger site, you can quickly switch between sites right from the app, without the need to sign out.

1 Select the **menu icon** at the upper left. A navigation panel will open.



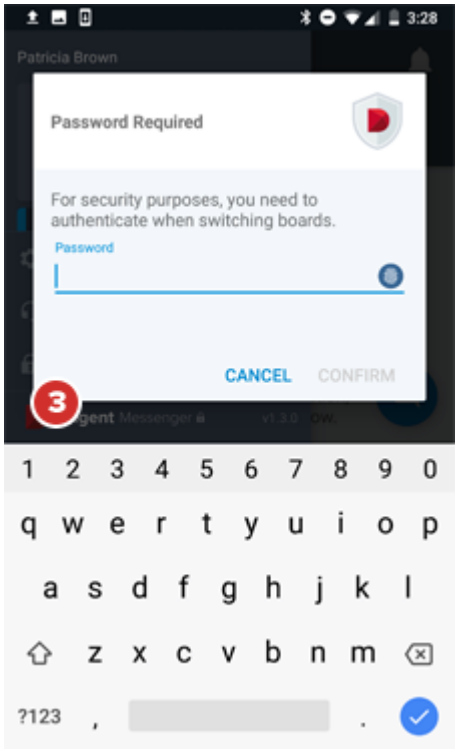
Note: The menu icon appears on main hub screens.

2 A list of your Messenger sites will appear. To switch to another site, select it.



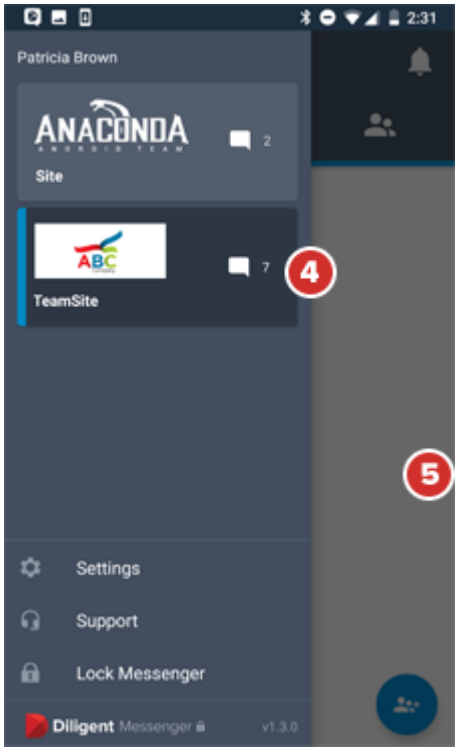
Note: If you are a member of only one Messenger site, your current site name and logo will appear.

3 You will be prompted to **re-authenticate** your identity with your password or fingerprint ID. Upon successful authentication, the site you selected will open.



4 The site list displays a **counter** of unread messages and announcements for each of your sites. If no counter appears, you are up-to-date.

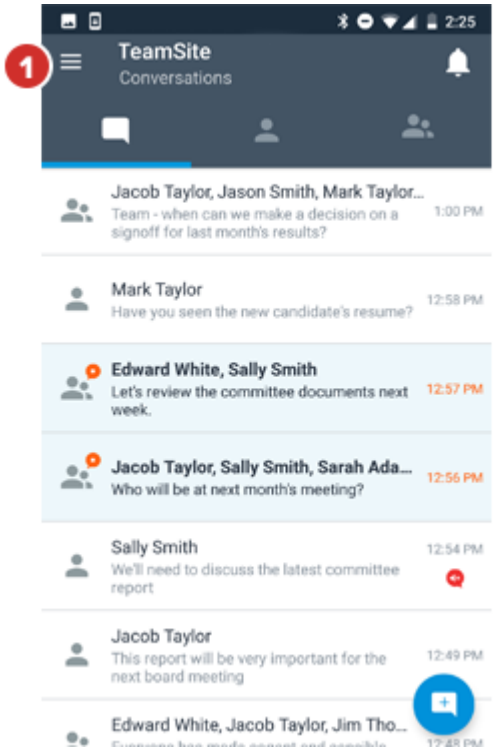
5 To close the navigation panel without switching sites, select anywhere outside of the panel, or swipe from left to right.


2:31
Patricia Brown
ANACONDA
2
Site
ABC
7
4
TeamSite
5
Settings
Support
Lock Messenger
Diligent Messenger
v1.3.0

17 Messenger for Android — Settings and personalization — App settings

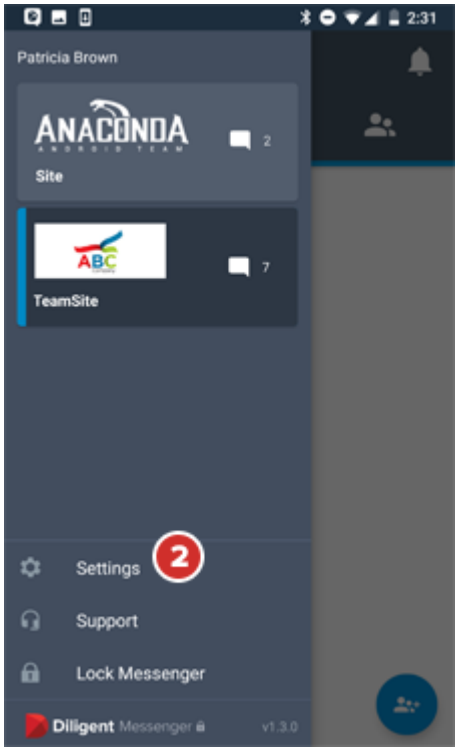
In-app settings let you change how Diligent Messenger behaves.

1 Select the **menu icon** at the upper left. A navigation panel will open.

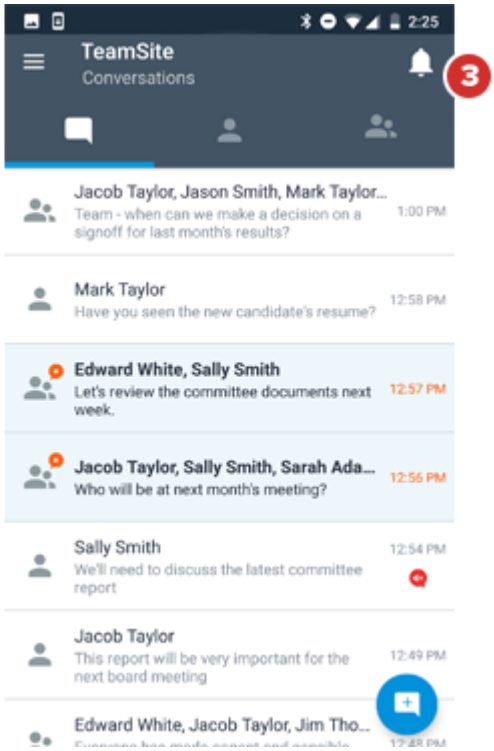


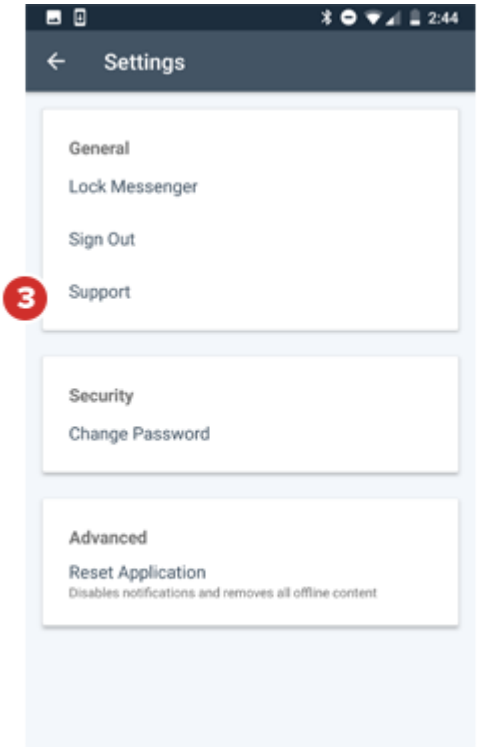
Note: The menu icon appears on main hub screens.

2 Select **Settings** to access the in-app Settings menu.

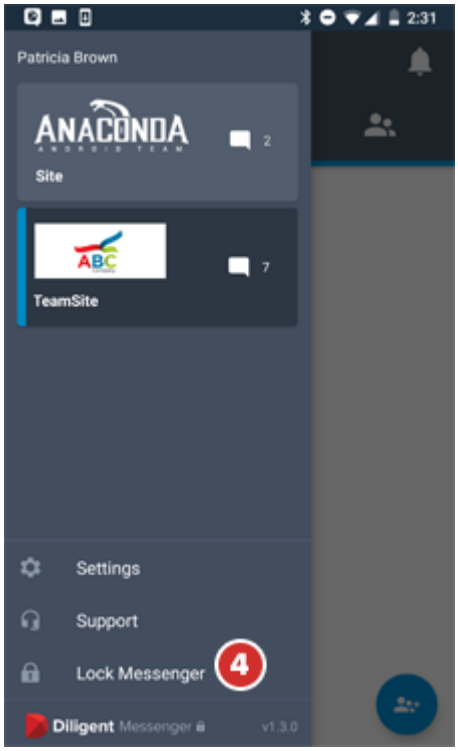


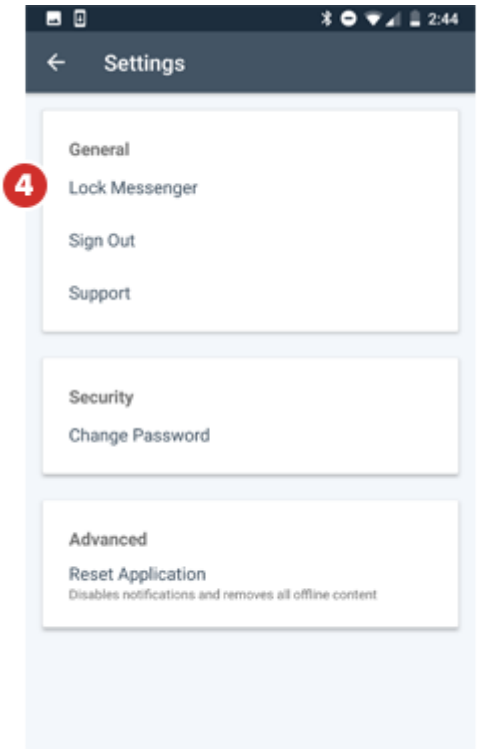
3 Select **Support** to see a list of all Diligent Global Support phone numbers. Select any number to call it.





4 Lock Messenger locks the app for security. You'll have to re-authenticate the next time you want to use the app, but you'll still get notifications.



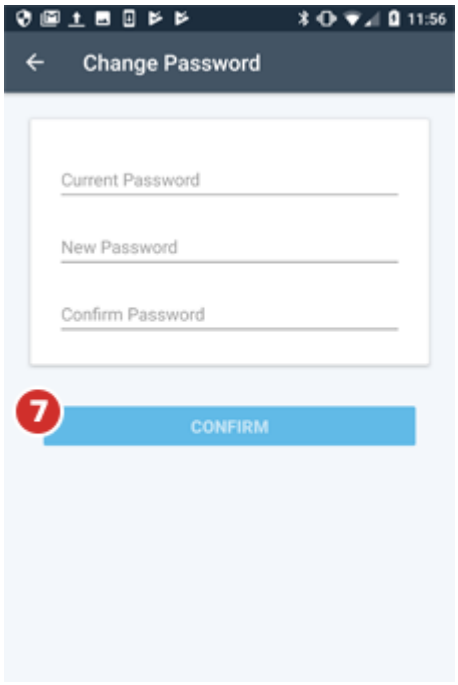


5 In the Settings menu, select **Sign Out** to exit the current site and return to the site entry screen. You will no

longer receive notifications of any new messages or announcements.

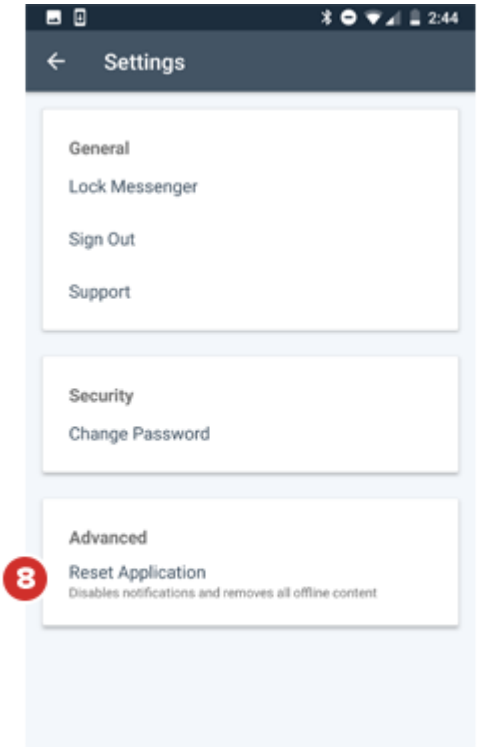
6 Select **Change Password** to manually update your password at any time.

7 From top to bottom, enter your current password, the password you would like to use instead, and your new password again. When you're done, select **Confirm**.



Note: Your new password must meet complexity requirements that are set by your company's security policy. As a general guide, passwords are typically case-sensitive and will require a capital letter, lower-case letter, number, minimum of 8 or more characters, and cannot contain your user name.

8 Select **Reset Application** to reset Diligent Messenger to a default state. Your conversations will remain stored on your site, but you will need to reconfigure any settings and re-enter your site name and sign-in credentials next time you access Messenger.



Note: The Sign Out and Reset Application functions are available from the Messenger sign-in and lock screens, via a menu icon at the upper right of the screen.

> ***Note:*** *If your device is set to a supported language, Diligent Messenger interface text will be automatically translated. Supported languages are: Dutch, English, French, German, Italian, Portuguese, Simplified Chinese, and Spanish.*

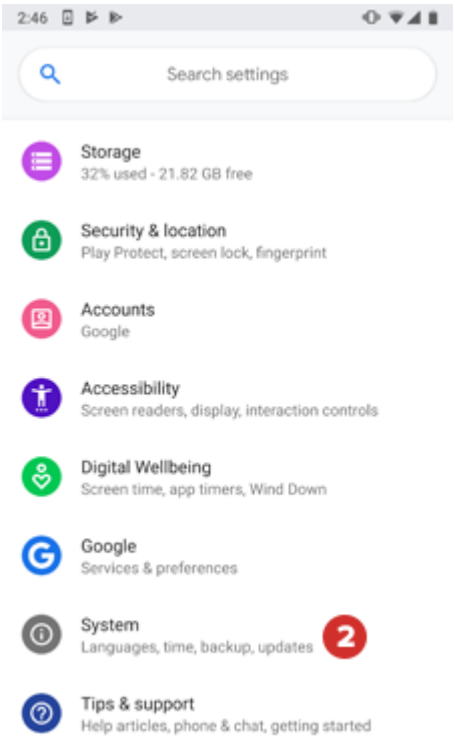
18 Messenger for Android — Settings and personalization — Language settings

The Diligent Messenger interface is available in eight languages: Chinese (Simplified), Dutch, English, French, German, Italian, Portuguese, and Spanish. The app interface will translate automatically if your device is set to one of these supported languages.

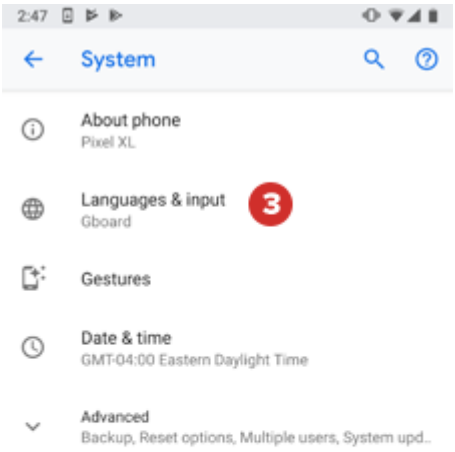
Note: The functionality of the Android operating system differs by device manufacturer. The instructions below provide general guidelines for changing the language on your device, but may not align exactly with your device's workflow. Consult documentation for your specific device for step-by-step instructions on changing your device language.

1 Locate and select your device's **Settings** icon.

2 In the Settings menu that appears, locate and select a **System** or **General** button.



3 Select the **Languages** (or similar) button.

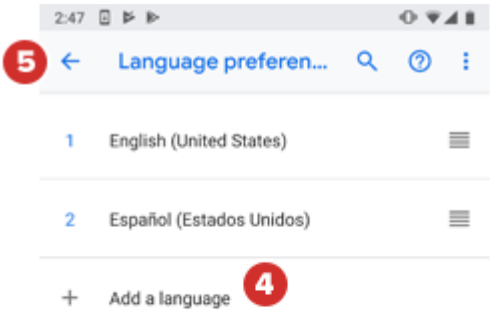


4 If a list appears on this screen, select your desired **language**. On some devices, you may need to select another "Languages" (or similar) button to view the list of languages. The following languages are supported by Diligent Messenger:

- English
- Italiano — Italian
- Deutsch — German
- Português — Portuguese
- Français — French
- Chinese, Simplified — Simplified Chinese
- Español — Spanish
- Nederlands — Dutch

Note: Depending on your device and available selections, several language options may initiate translation of Diligent Messenger (for example, a device may include "Español" and "Español - Latin America" options, both of which would translate Diligent Messenger to Spanish).

5 You may need to select a **Done** (or similar) button, or exit out of the Settings application. Your entire device, including Diligent Messenger, will convert to the selected language. This process may take several moments to complete.


2:47
5
Language preferen...
1
English (United States)
2
Español (Estados Unidos)
Add a language
4