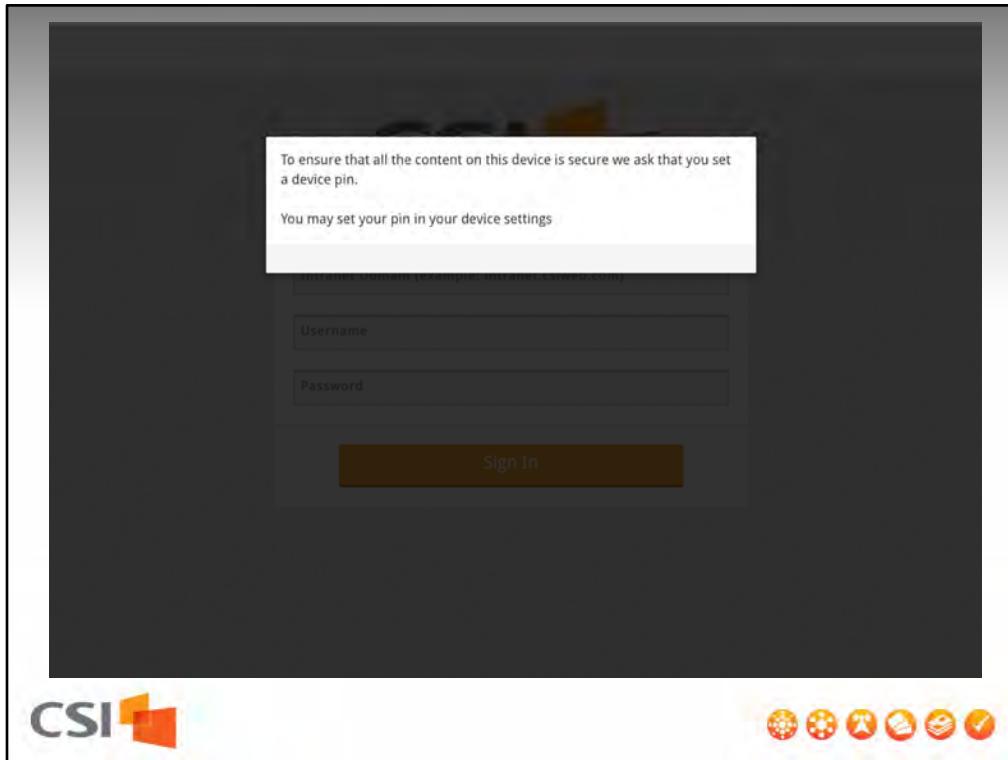


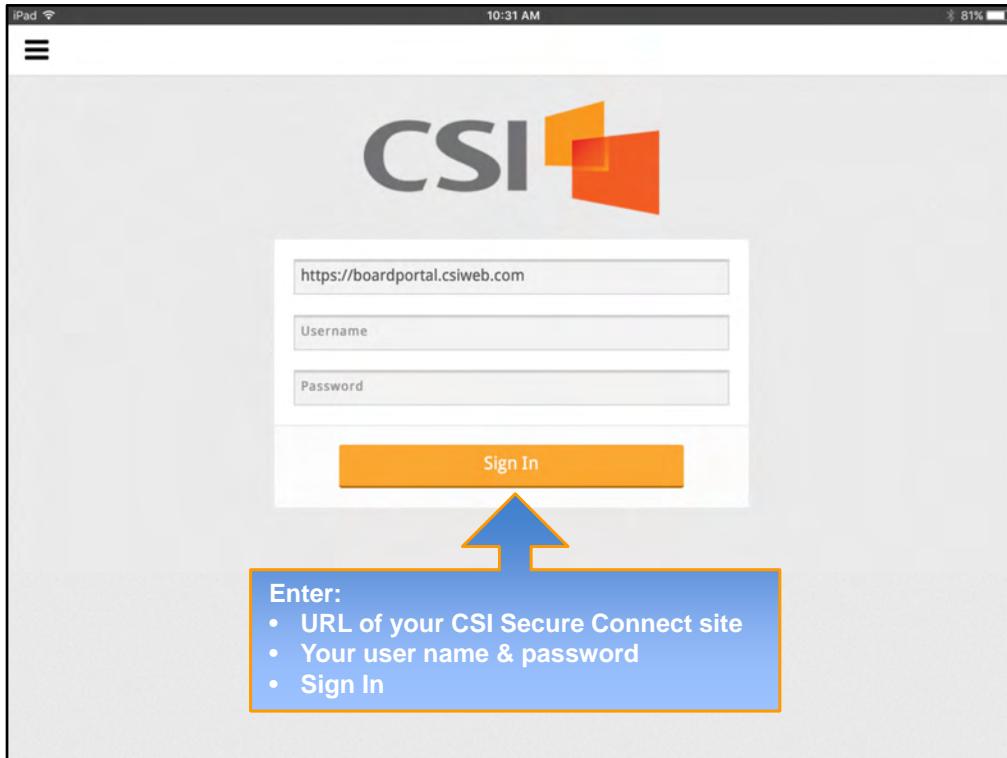


Using the CSI Secure Connect app, you have the ability to view documents offline, utilize multiple security settings, make notes and annotations on documents and access search features. The app is available for download in the App Store for iOS devices and the Google Play Store for Android devices.



During the installation of the app, if your device does not have a PIN, you will receive this notice.

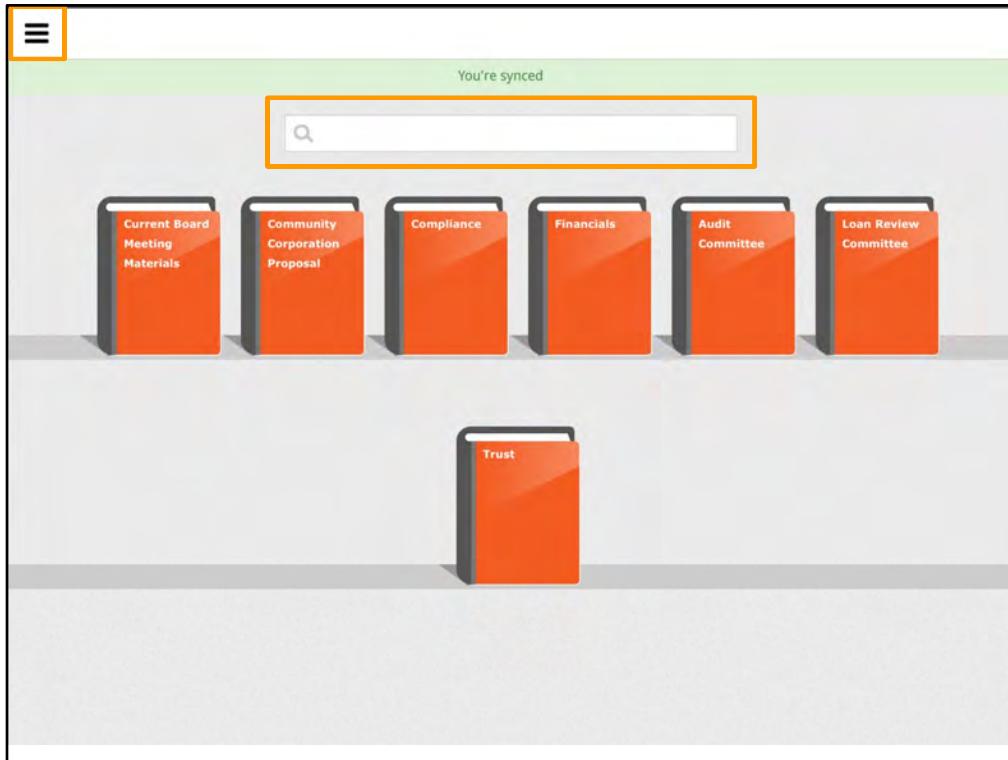
Set the device PIN using the device settings.



Once you've installed the app, enter the URL of your CSI Secure Connect site, your user name and password and then Sign In.

Do NOT include the https:// portion of the URL

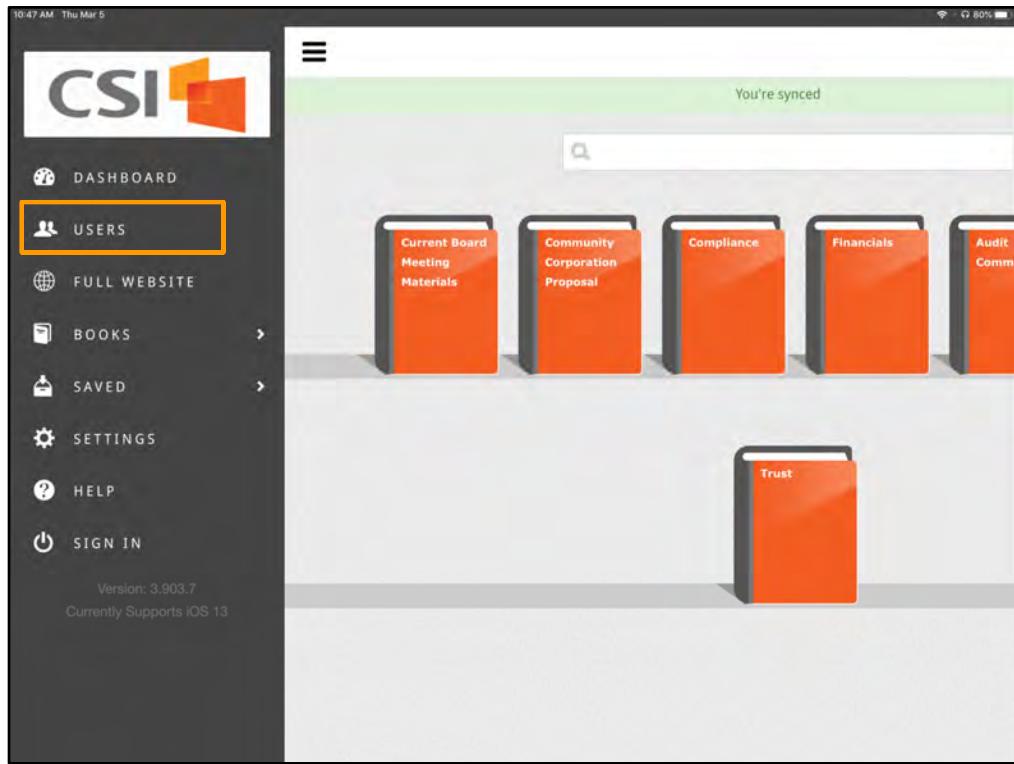
Your app will then begin the process of syncing all the information in the Book section on your website. Once syncing is complete...



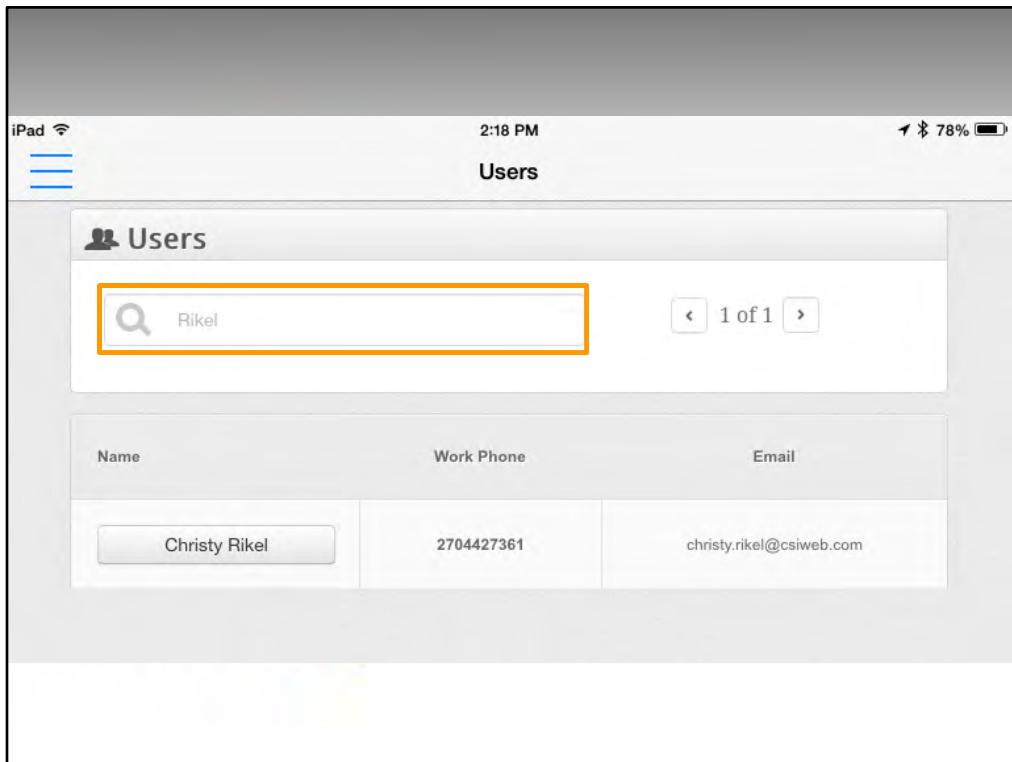
You will see your **Dashboard**. The Dashboard contains the same books that appear on your website. These books and all documents within them have now been downloaded for offline viewing. This allows you to access materials even when you don't have Internet or Wi-Fi access. Documents within these books can be marked up with notes and annotations.

Search capabilities are available to find any item located in any book.

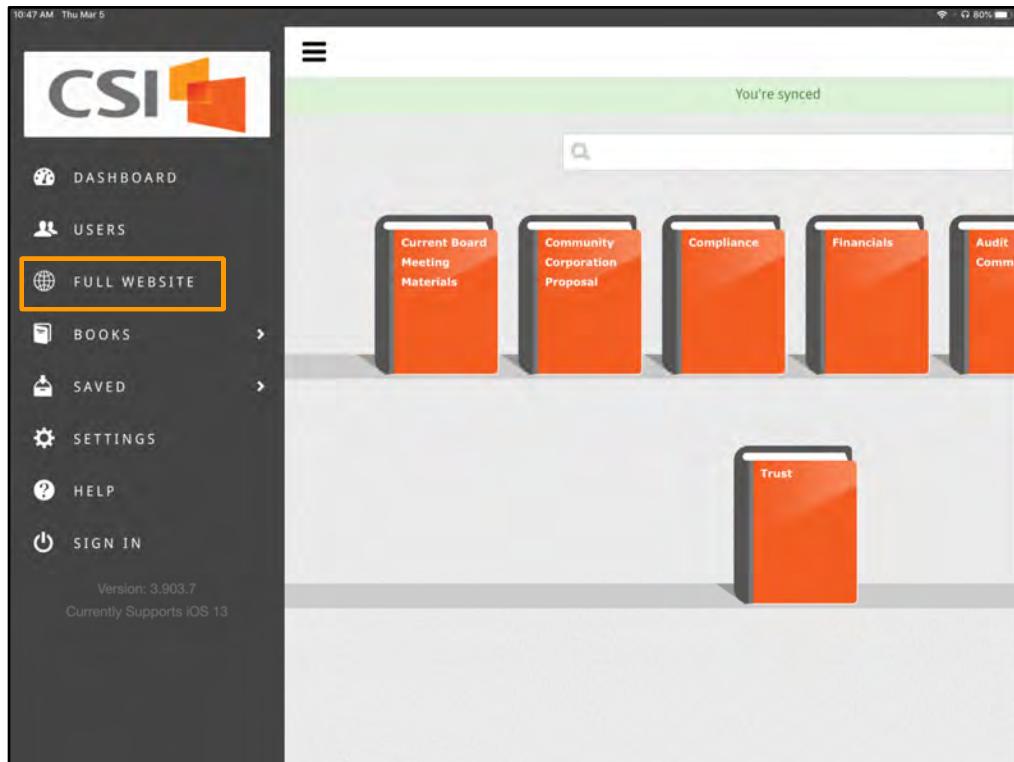
To access the **App Menu**, select the icon located in the upper left corner.



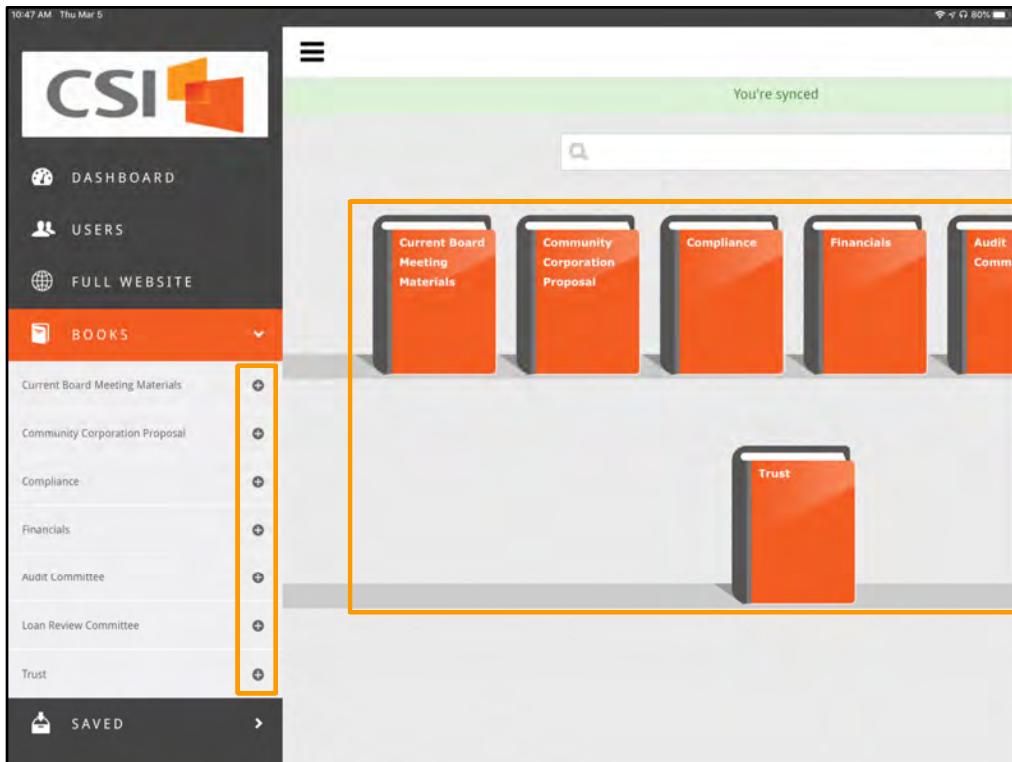
The **User Directory** is accessible and will sync to your app the first time you access the tab. Once the user information has synced...



Search for the user's name and it will display the email address & phone number as listed directory. The User Directory is available without Internet/Wi-Fi access.



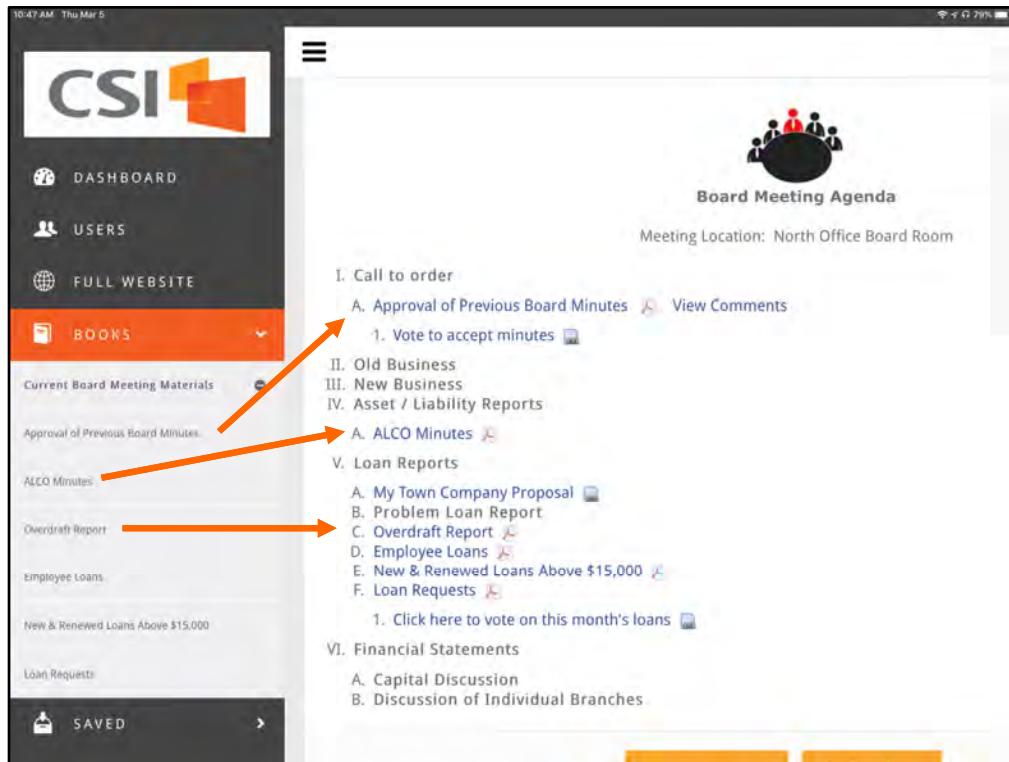
Using the **Full Website** option, you can view your complete CSI Secure Connect site. You must have Internet access in order to access the full website.



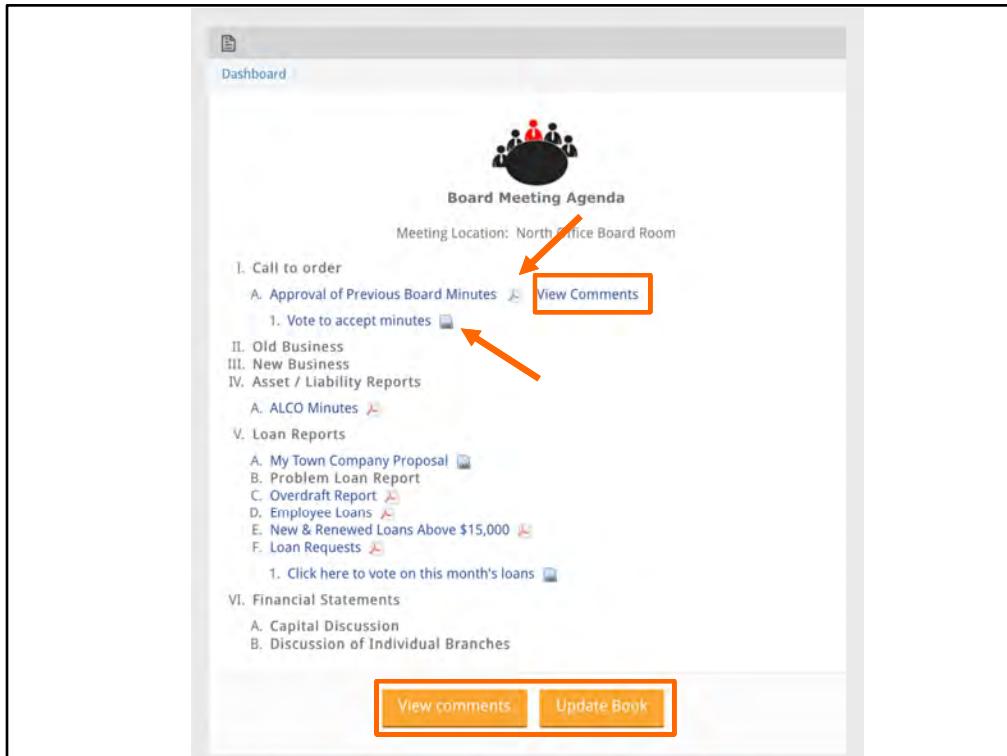
The **Books** tab gives access to the same books as displayed in your Dashboard.

Touch the + sign next to a book name to see a list of the documents listed on that page.

Using the Board Meeting Materials as an example...



Access the document by touching the document's name in the side bar on the left or as they are listed in the agenda format on the right.



When accessing information within a book, users will notice 2 types of item icons – a pdf icon and a link icon.

The pdf icon indicates material that has been downloaded to the app and is available without Internet connection.

The link icon indicates material that requires Internet access, such as a link to a website or a link to a vote.

View Comments is next to a document or at the bottom of the page. Select to view or make comments for other users to access.

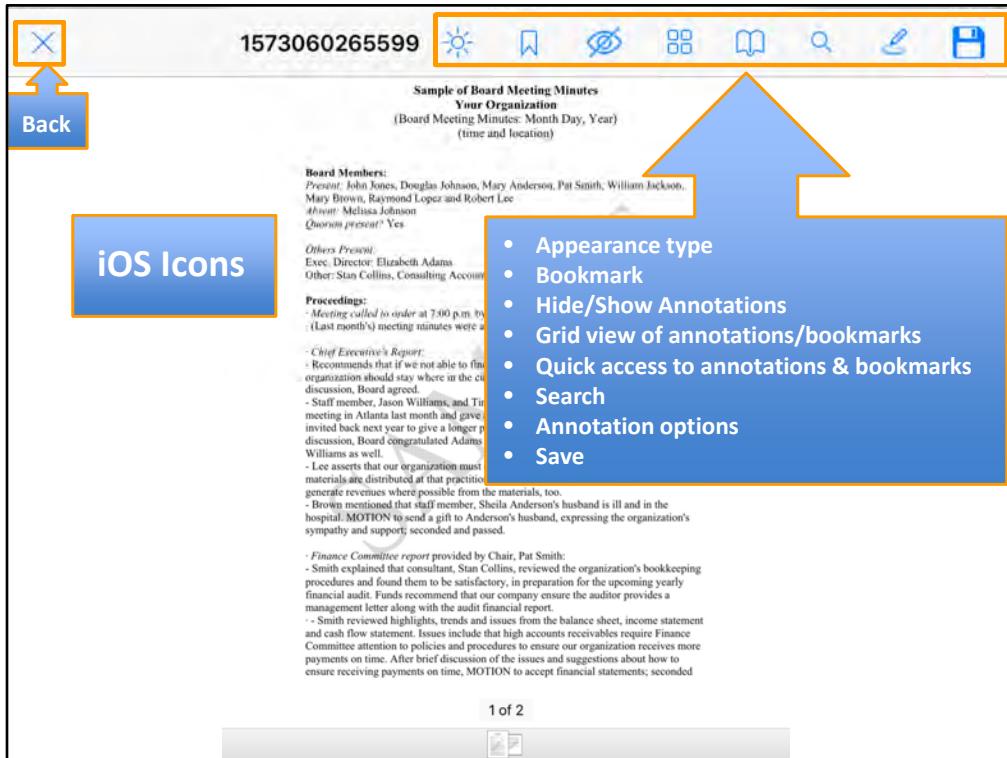
Update Book allows you to re-sync the information in only this book.

The screenshot shows a 'Comments' section on a board meeting dashboard. On the left, there are three previous comments from users Christina, Mike, and 'Board Portal'. Each comment includes a timestamp, a 'Display to' field (set to 'Everyone'), and the comment text. On the right, a 'New Comment' form is displayed. It includes a 'Display to' section with radio buttons for 'Only Me (Private)', 'All Users' (which is selected), 'Division', 'Department', 'Sub-Department', and 'Group'. To the right of these buttons are dropdown menus for 'First Institution' (set to 'Corporate'), 'Corporate' (set to '(no subdepartments)'), and 'Bank A'. Below this is a text input field with placeholder text 'Type your comment here...'. At the bottom right is a large orange 'Submit comment' button.

All previous comments are located on the left.

New comments can be made on the right.

Select the radio button next to the option for whom the comment is to display.



Once the document is opened, it will appear as well as several icons at the top. Here are the icons for iOS devices

Back to close the document

Appearance

Bookmark

Hide or show annotations

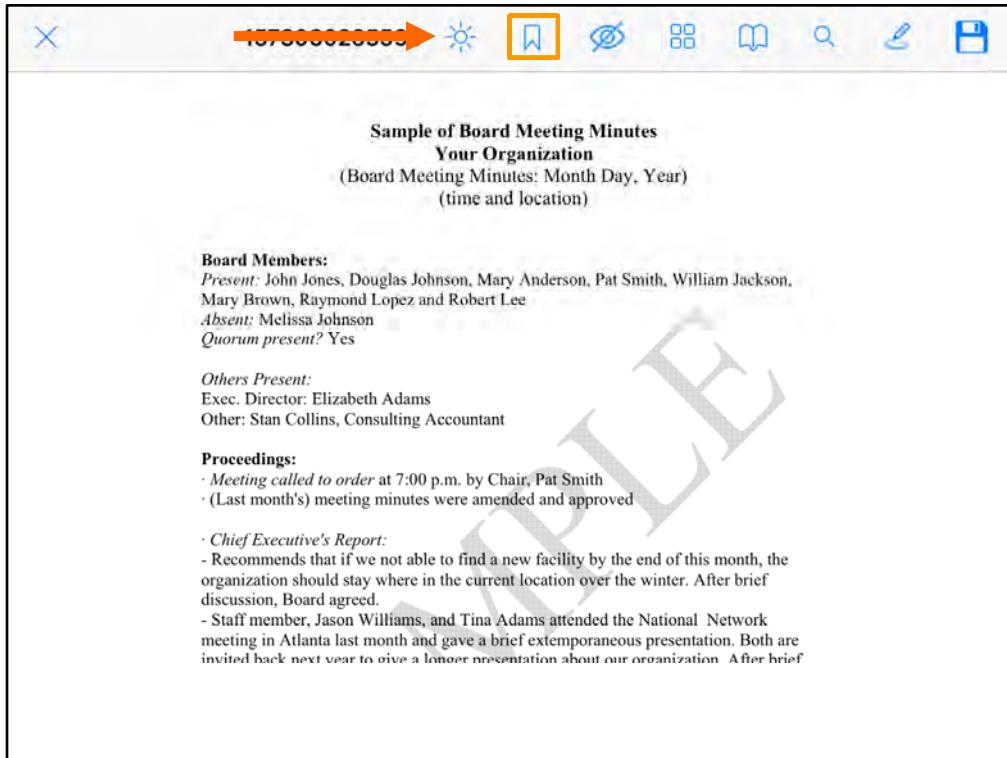
Grid view of all annotations and bookmarked pages

Quick access to annotations & bookmarked pages

Search function

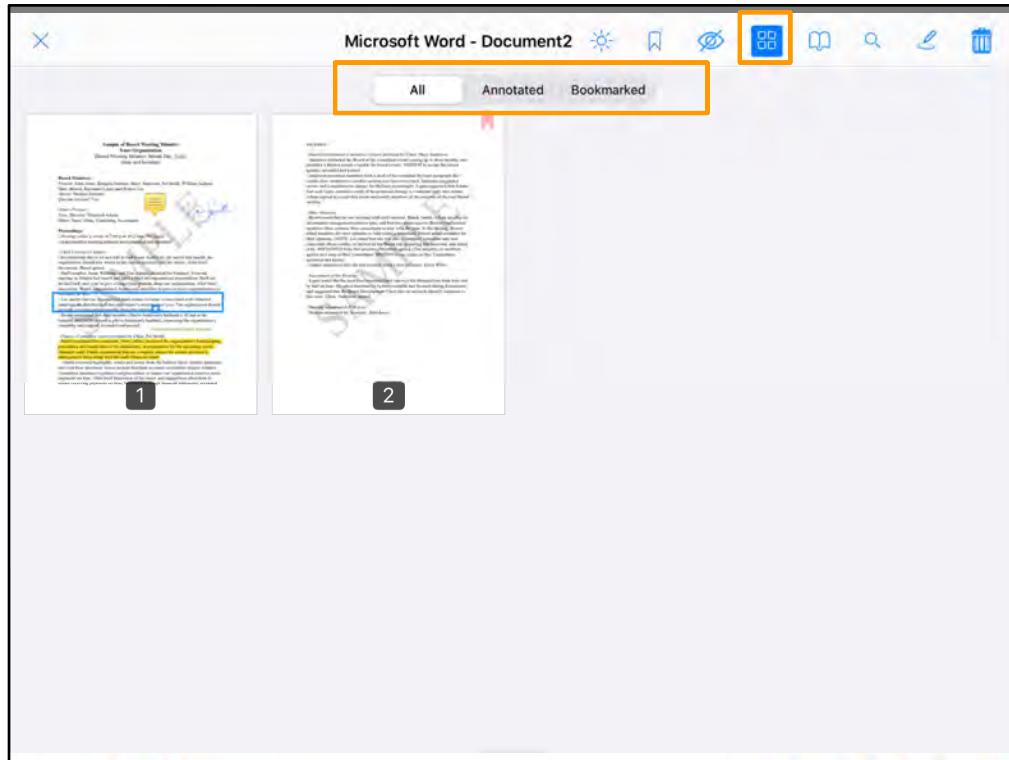
Annotations

Save



The **Appearance** icon allows the user to adjust the brightness as well as change the background color of the document for easier reading.

The **Bookmark** icon allows the user to mark a page to locate quicker and easier.



The **Grid** icon also allows users to quickly find annotated and or book marked pages.

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Sample of Board Meeting Minutes for Your Organization

(Board Meeting Minutes: (time and location))

Board Members:
Present: John Jones, Douglas Johnson, Mary Ann Brown, Raymond Lopez and Robert Lee
Absent: Melissa Johnson
Quorum present? Yes

Others Present:
Excc. Director: Elizabeth Adams
Other: Stan Collins, Consulting Accountant

Proceedings:
- Meeting called to order at 7:00 p.m. by Chair, [REDACTED]
- (Last month's) meeting minutes were amended

- Chief Executive's Report:
- Recommends that if we not able to find a new location for the meeting, the organization should stay where in the current location.
- Staff member, Jason Williams, and Tina Adams, attended a meeting in Atlanta last month and gave a brief presentation. They were invited back next year to give a longer presentation.
- Board congratulated Adams and asked Williams as well.

~~Lee asserts that our organization must ensure it~~

Annotations:

- Brown mentioned that staff member, Sheila Anderson's husband is ill and in the hospital. MOTION to send a gift to Anderson's husband, expressing the organization's sympathy and support..

christy.rikel, 9/14/17, 4:15 PM

ABC Consulting Firm
christy.rikel, 9/14/17, 4:17 PM

Ink, 1 Line
christy.rikel, 9/14/17, 4:16 PM

Quickly access annotations and bookmarked pages using the **Open Book** icon.

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pat smith Page 1

and passed.

- *Board Development Committee's report* provided by
- Anderson reminded the Board of the scheduled retire provided a drafted retreat schedule for board review, ! agenda; seconded and passed.
- Anderson presented members with a draft of the new would allow members to conduct actions over electoral review and a resolution to change the By-laws accord first seek legal counsel to verify if the proposed change Adams agreed to accept this action and notify member meeting.
- *Other business:*
- Brown noted that he was working with staff member information management systems plan, and that two y members three resumes from consultants to help with asked members for their opinions to help select a cons their opinions. (NOTE: Lee noted that she was also a concerned about conflict of interest in her Board role) to be ABSTAINED from this selection. Members again agreed on Lease-or-Buy Consultants. MOTION to use seconded and passed.
- Adams announced that she had recently hired a new
- *Assessment of the Meeting:*
- Lopez noted that the past three meetings have run over by half an hour. He asked members to be more mindful and suggested that the Board Development Chair take this issue. Chair, Anderson, agreed.
- Meeting adjourned at 9:30 p.m.
- Minutes submitted by Secretary, John Jones.

Mary Anderson, **Pat** **Smith**, William Jackson, Mary Brown, Raymond Lopez and Robert Lee
Absent: Melissa Johnson Quorum present? Yes Others Present: Exec. D

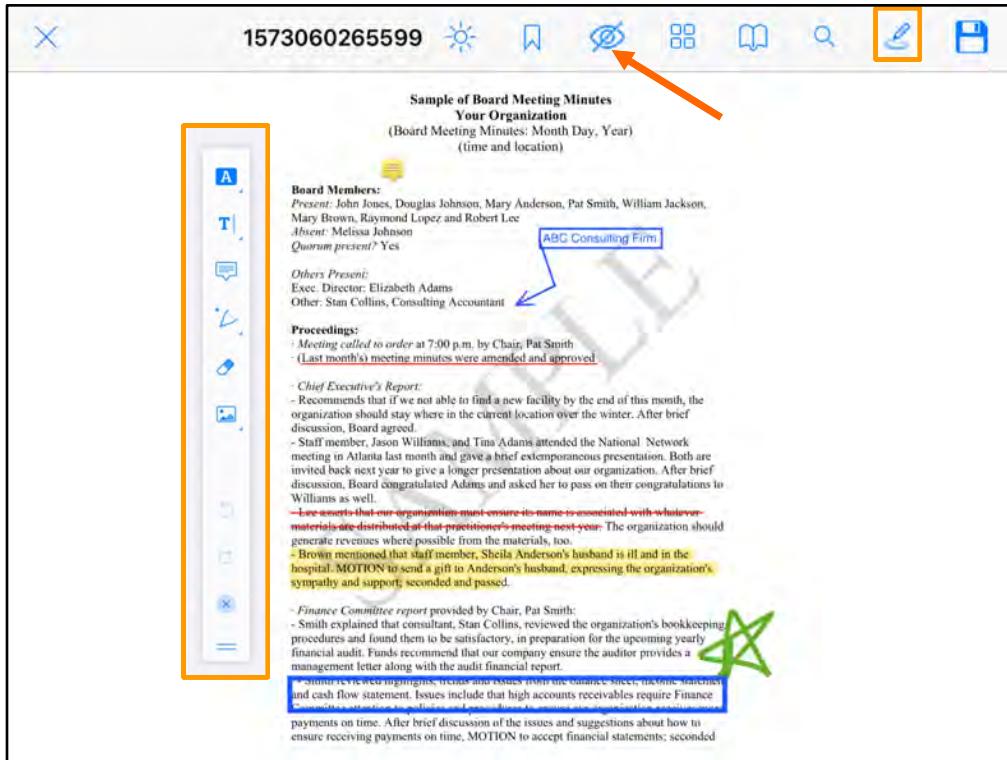
7:00 p.m. by Chair, **Pat** **Smith** - (Last month's) meeting minutes were amended and approved

- Chief Executive's Report: - Recommends that if we not able to fi

Page 1

3 matches found

The **Search** feature allows users to search for information within the document

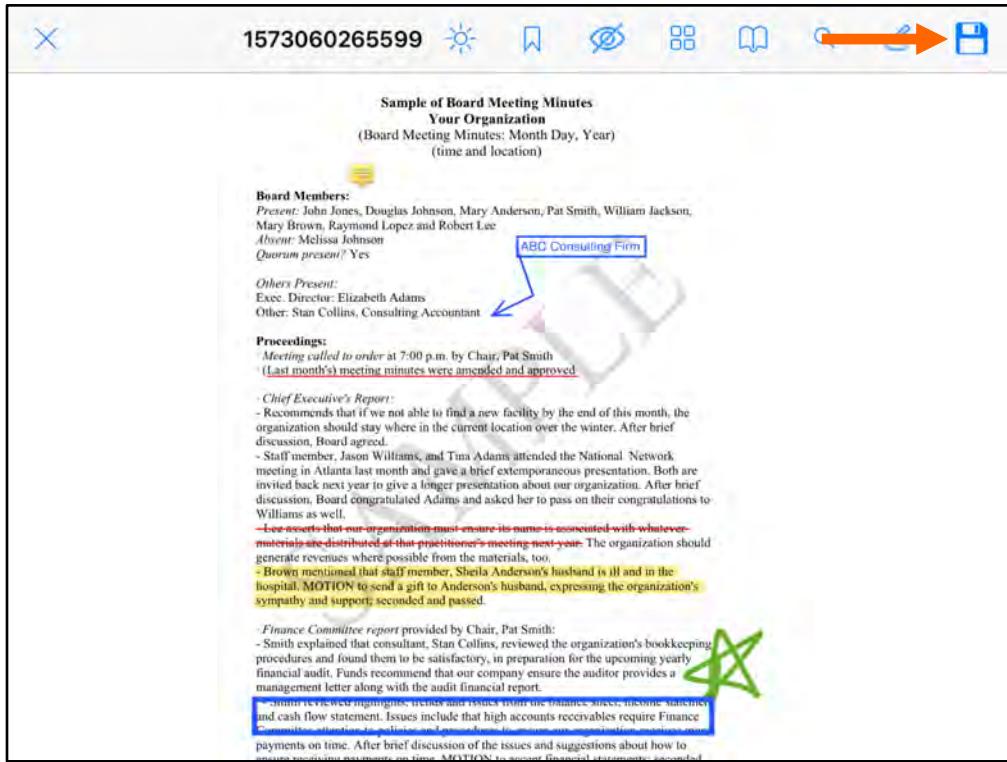


Using the **Annotation** icon, users will see all annotation and note making options in the toolbar.

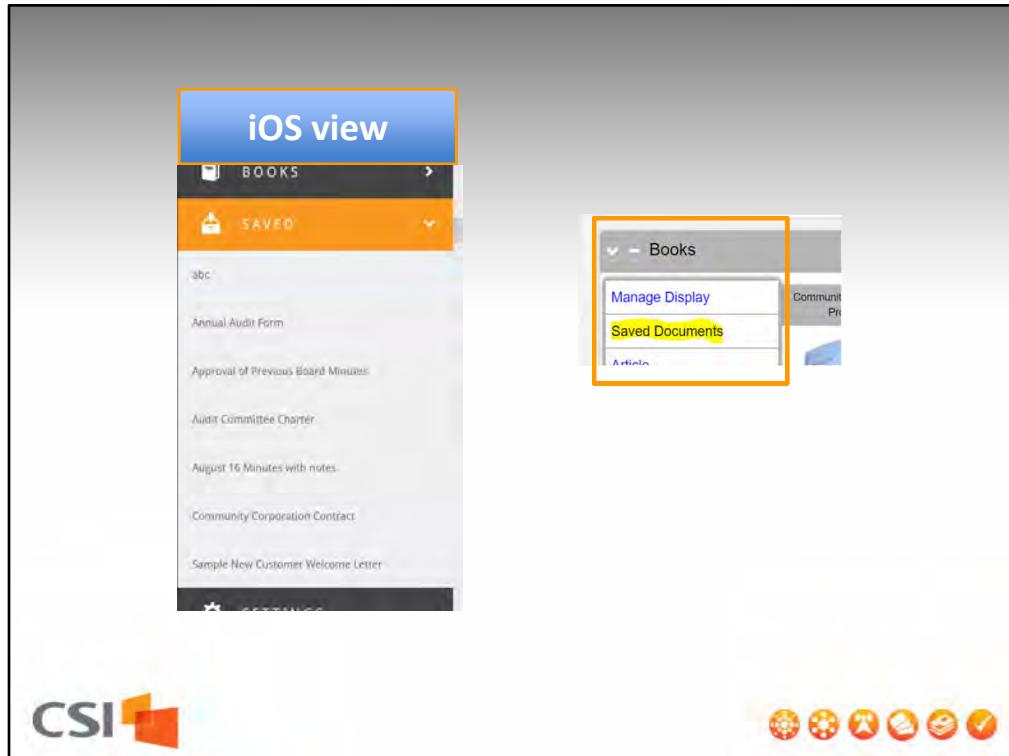
Here you can see a few examples of annotations and notes.

The annotation toolbar can be moved around if its covering part of the document.

Using the **Hide/Show** icon, the eyeball, users can opt to display or turn off all annotations/notes that have been made in the document



The **Save** icon will allow the document to be easily accessed from the Saved tab in the app and creates a back up copy that can be accessed from the website. The document automatically saves annotations so if the user closes the document, the annotations are still available. However, if the user syncs without saving then the app will override the document and any unsaved notes/annotations will be lost.



Saved documents can be accessed from within the app as well as in the Book section on the full CSI Secure Connect website.

Board Meeting Agenda

Meeting Location: North Office Board Room

I. Approval of Previous Board Minutes  

 A. Vote to accept minutes 

II. Old Business

III. Contributions 

 A. Other 

 B. FS 

IV. New Business

V. Asset / Liability Reports

 A. ALCO Minutes 

VI. Loan Reports 

 A. Problem Loan Report

 B. **Overdraft Report** 

 C. Employee Loans 

 D. New & Renewed Loans Above \$15,000 

 E. Loan Requests 

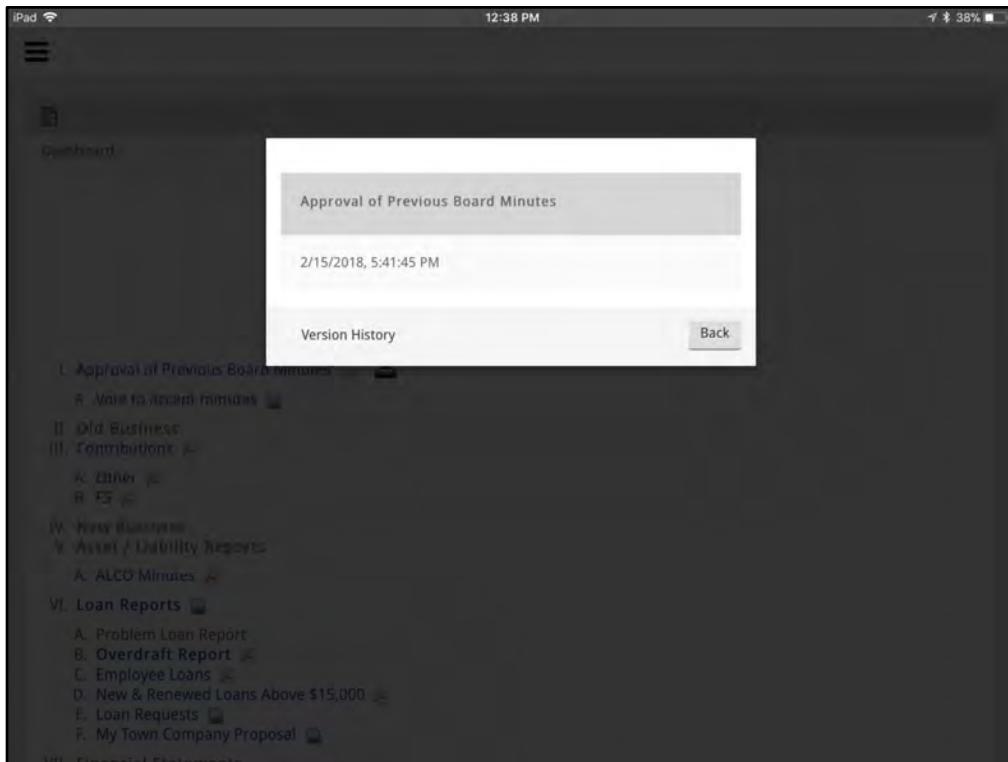
 F. My Town Company Proposal 

VII. Financial Statements

If a user has made annotations and saved a document and that document is replaced on the website, a drawer icon will appear next to the item for that user.

By touching the item name, the user can see the new version of the document.

By touching the drawer icon...



The user can view the previously saved and annotated version of the document.
The date and time of when the user saved the item will be displayed.
Simply touch the date and time to view the previously saved version.



Board Meeting Agenda

Meeting Location: North Office Board Room

I. Call to order

A. Approval of Previous Board Minutes  [View Comments](#)

1. Vote to accept minutes 

II. **Old Business**

III. New Business

IV. Asset / Liability Reports

A. ALCO Minutes 

V. Loan Reports

A. My Town Company Proposal  [View Comments](#)

B. Problem Loan Report

C. Overdraft Report 

D. Employee Loans 

E. New & Renewed Loans Above \$15,000 

F. Loan Requests 

1. Click here to vote on this month's loans 

VI. Financial Statements

A. Capital Discussion

B. Discussion of Individual Branches

[View comments](#) [Update Book](#)

Voting is available for users within the app when connected to the Internet. Simply select the item....

Vote to accept minutes

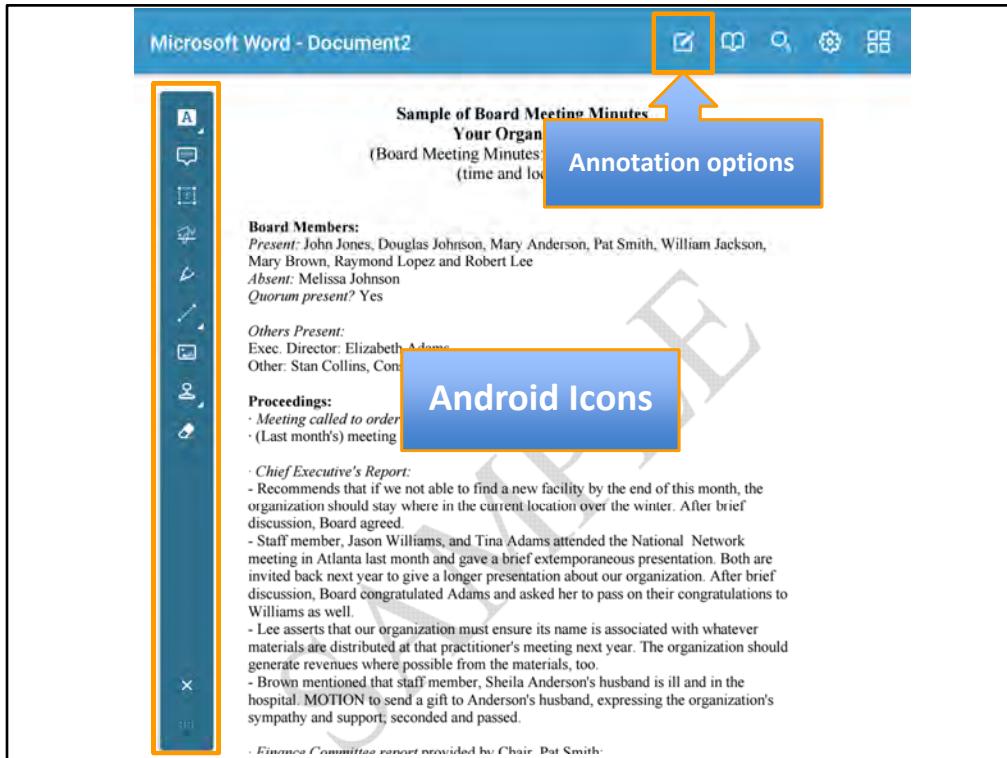
Vote To Accept Minutes

Accept previous meeting minutes? Yes No Abstain Yes with conditions

Comments:

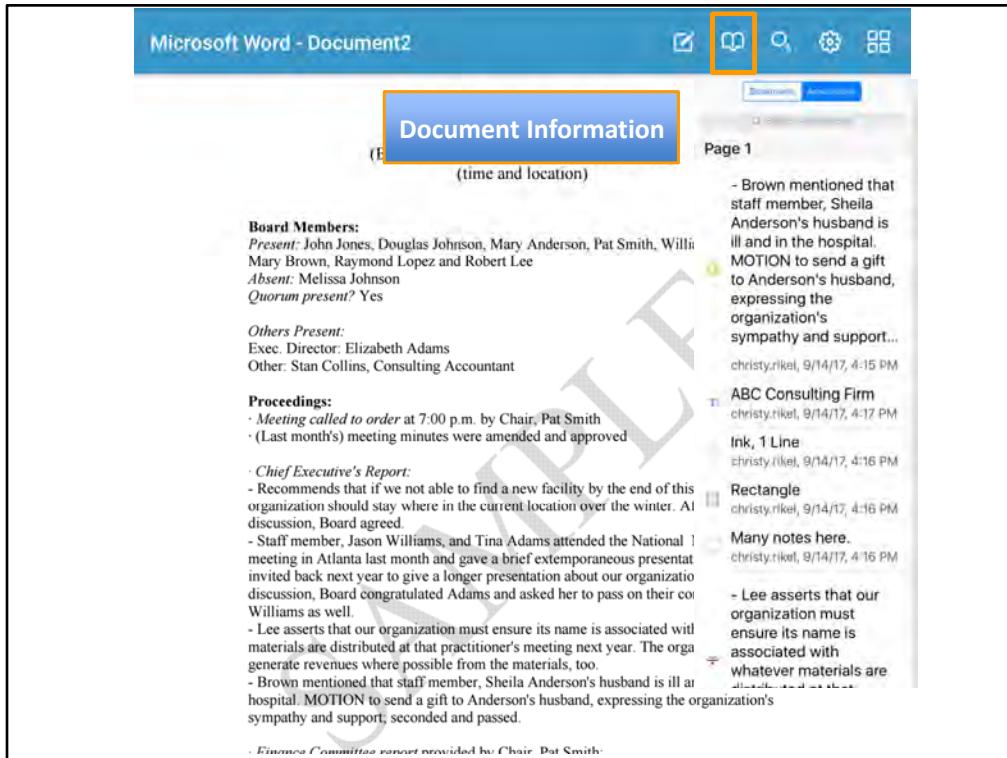
Submit

And then make the selection.

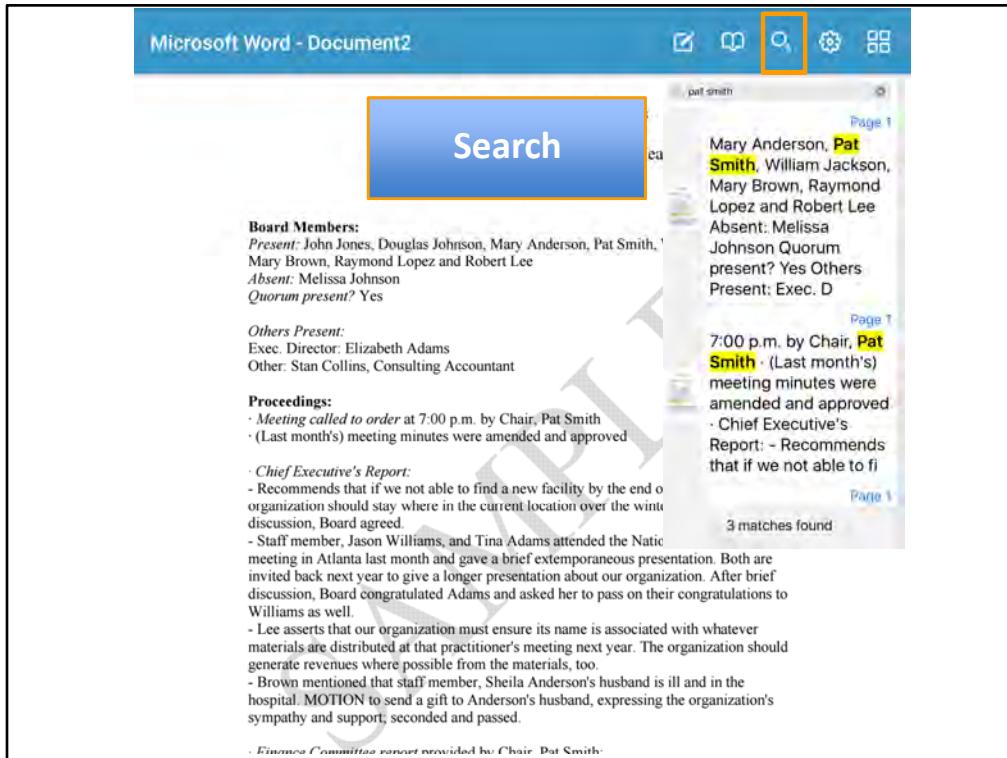


Android devices have the all same functionality as iOS devices.

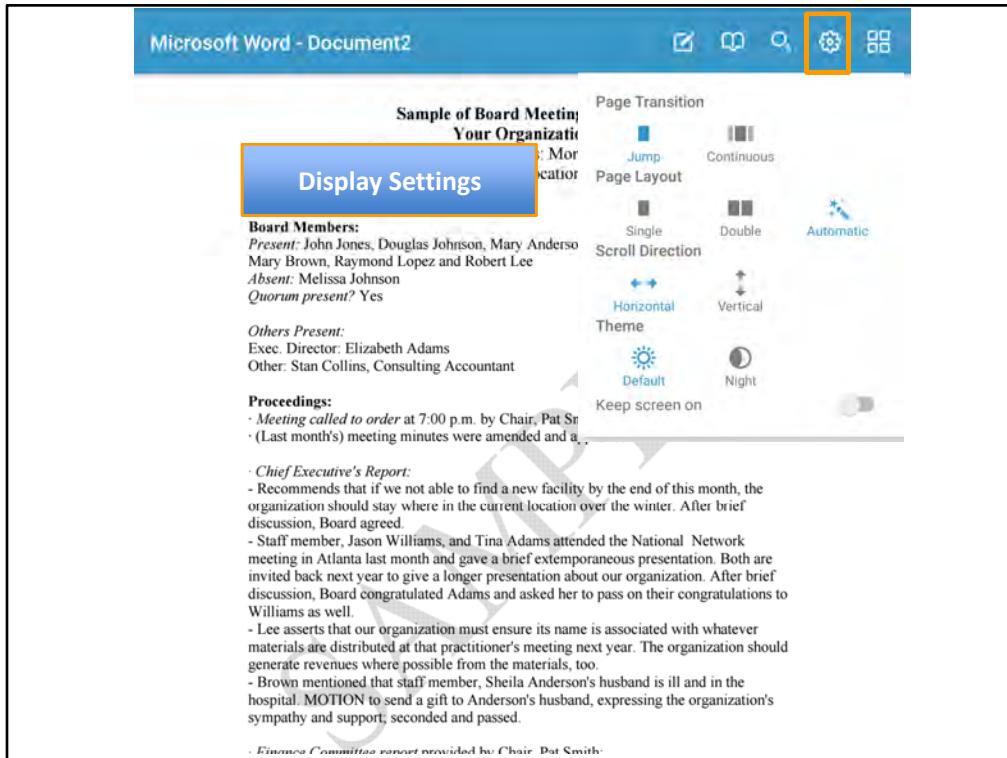
Display Annotation tools. The annotation toolbar can be moved around if its covering part of the document.



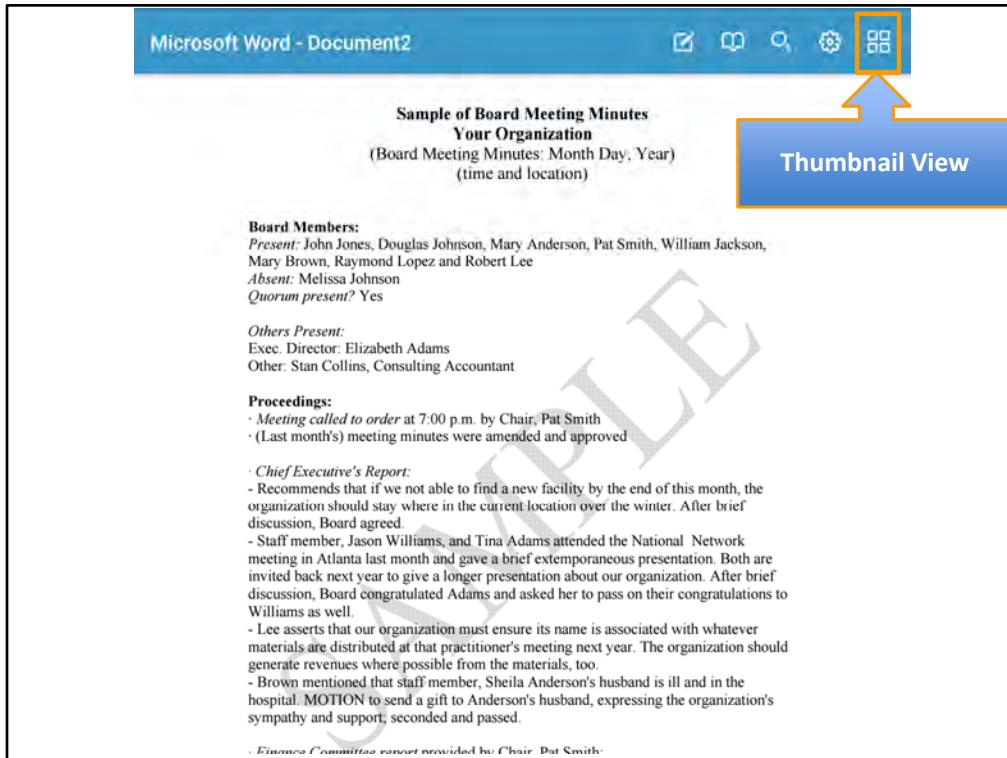
View Document Information such as bookmarks and annotations.



Search the document for a word or phrase.



Adjust page layout and appearance for easier viewing.



Display a Thumbnail view of all pages. Allows the user to quickly find a specific page. Touch on any thumbnail to go to that page.

Board Meeting Agenda

Meeting Location: North Office Board Room

I. Approval of Previous Board Minutes

II. Old Business

III. Contributions

A. Other

B. FS

IV. New Business

V. Asset / Liability Reports

A. ALCO Minutes

VI. Loan Reports

A. Problem Loan Report

B. Overdraft Report

C. Employee Loans

D. New & Renewed Loans Above \$15,000

E. Loan Requests

F. My Town Company Proposal

VII. Financial Statements

A. Capital

B. Branches

C. 12 Mo

D. Budget

E. MTD

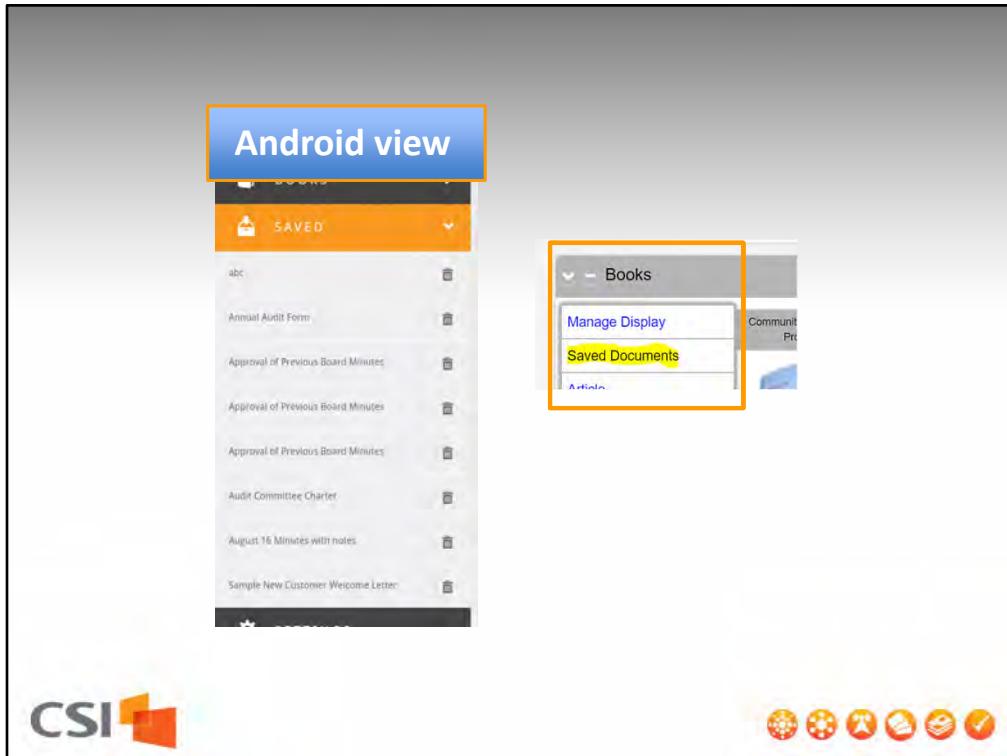
View comments

Update Book

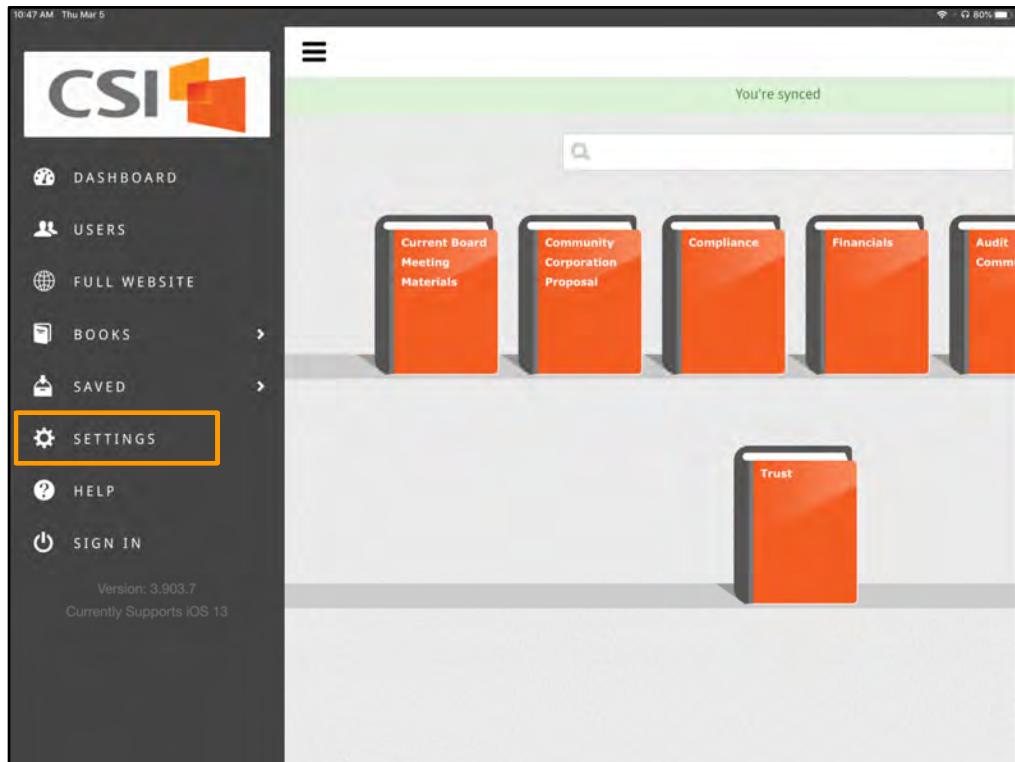
Android Icons

If the Android user wishes to save the annotated document, the Save icon is located next to the document name.

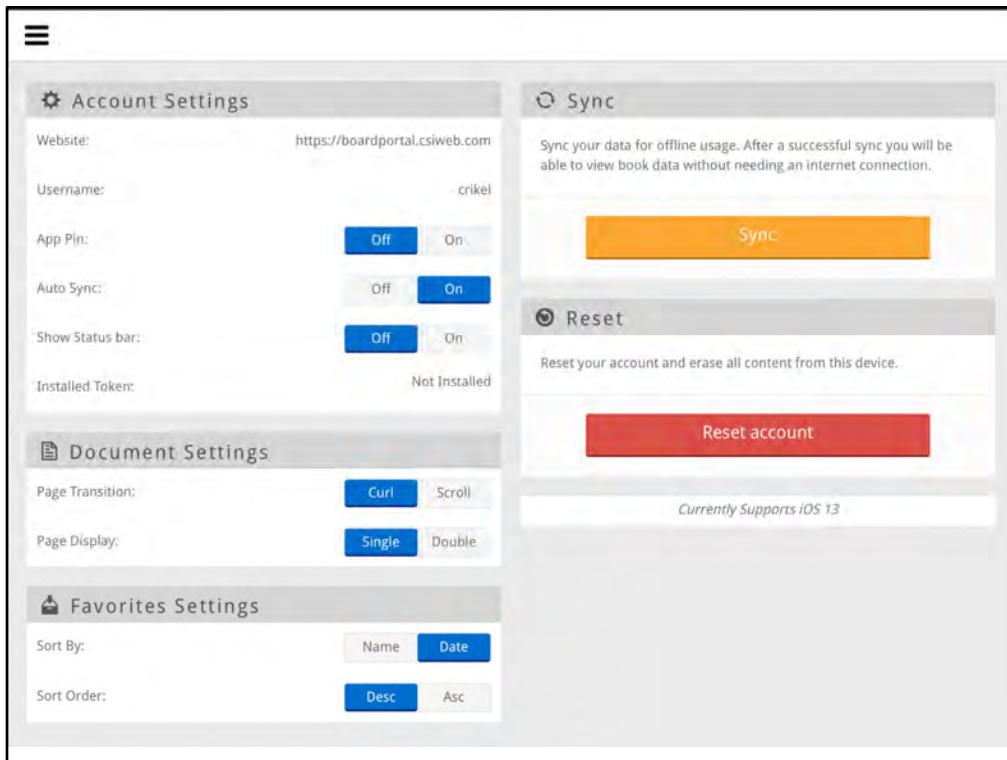
If they no longer want to keep the document, select the trash can icon.



Saved documents can be accessed from within the app as well as in the Book section on the full CSI Secure Connect website.



The **Settings** tab gives users additional options



Account Settings displays the information about your app and allows you to set some options:

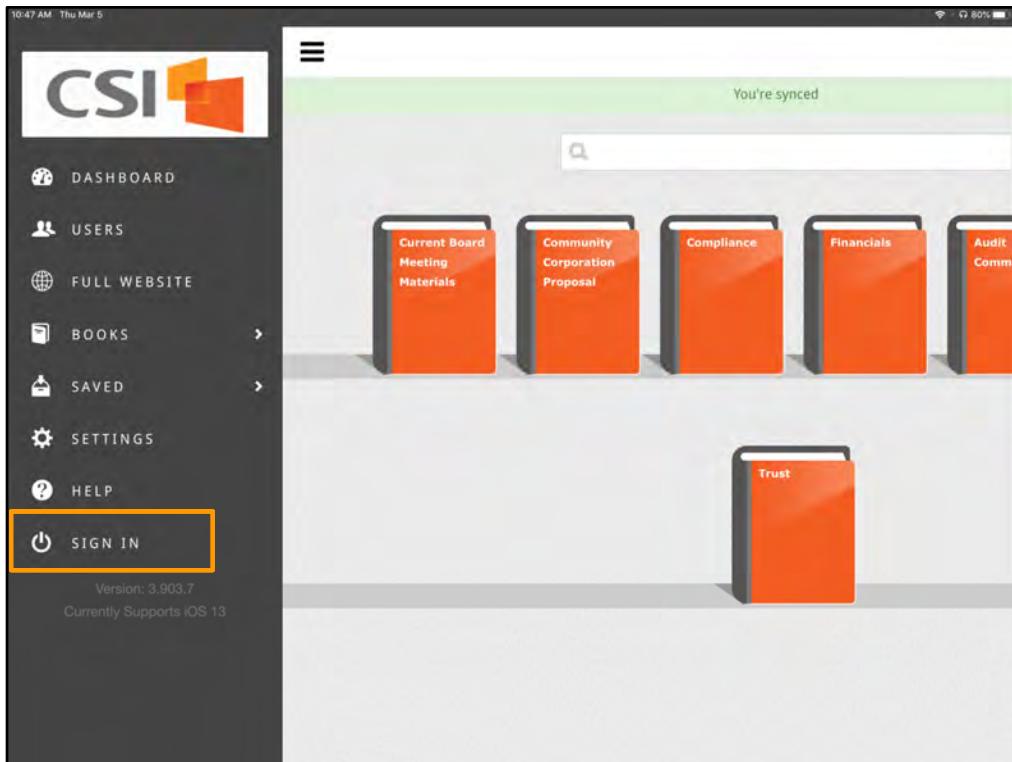
- The **Website** is the URL of your CSI Secure Connect Web site.
- The **Username** is what you use to log into the app.
- The **App Pin** will require the user to enter a PIN in order to open the app. This allows you to let other people use the device without running the risk that they can open this app. (This does not replace the passcode requirement for your device.) The default setting is OFF.
- **Auto Sync** automatically downloads the ONLY the new and updated book information. The default setting is ON. If all documents aren't downloaded during this process, the Update Book option is available once you've opened the book.
- **Installed Token:** displays if a security token has been installed on this device. A token is necessary if the user wishes to access the Full Website.

Document Settings allows the user to set how they want the document to display and pages to transition.

The **Favorites Settings** are for each user to choose how they would like to display any documents they have saved.

Syncing the app with your CSI Secure Connect website will sync ALL book information to your device

Reset will reset your account and erase all content from the app. A warning will be displayed to confirm that you want to erase all content.

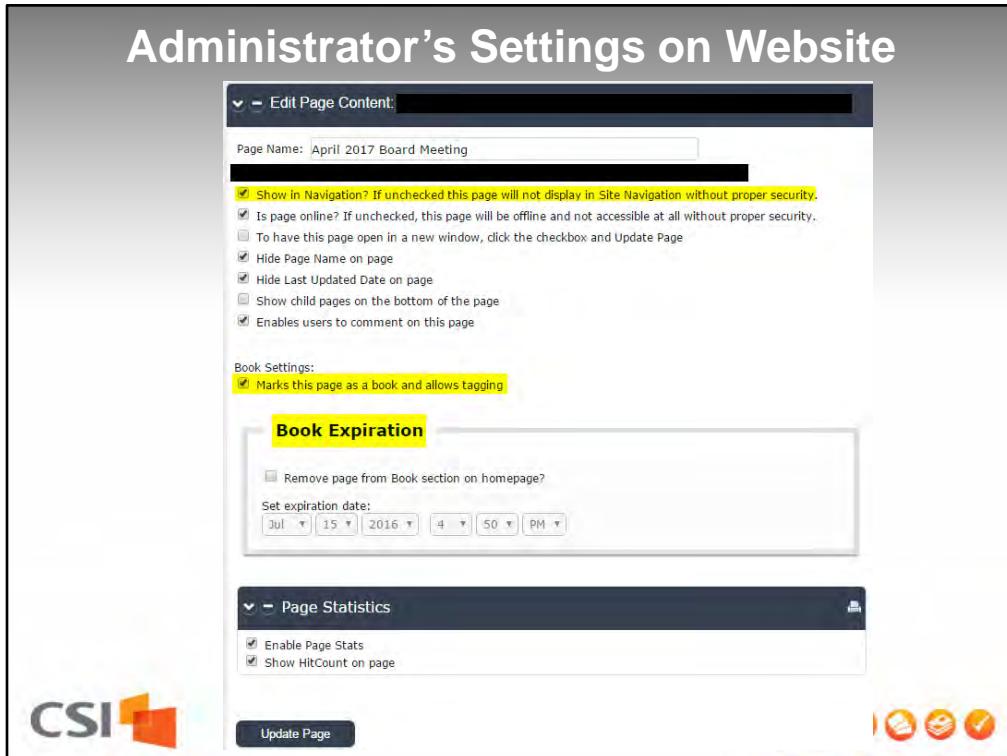


Back on the Menu, select **SIGN IN** to disconnect from your CSI Secure Connect website. You will still be able to view books that were previously synced to your app. If you are prompted to change your password during login (if your password has expired, for example), password changes will be passed along to the Secure Connect website. Similarly, if you change your password on the website, your password for login from the app will also change.

Administrator's Settings on Website



Administrators determine which pages are made into books, which books are displayed in the app, if documents can be saved as well as several other options. There are several settings on the website that **MUST** be selected in order to have book information sync'd to your app.

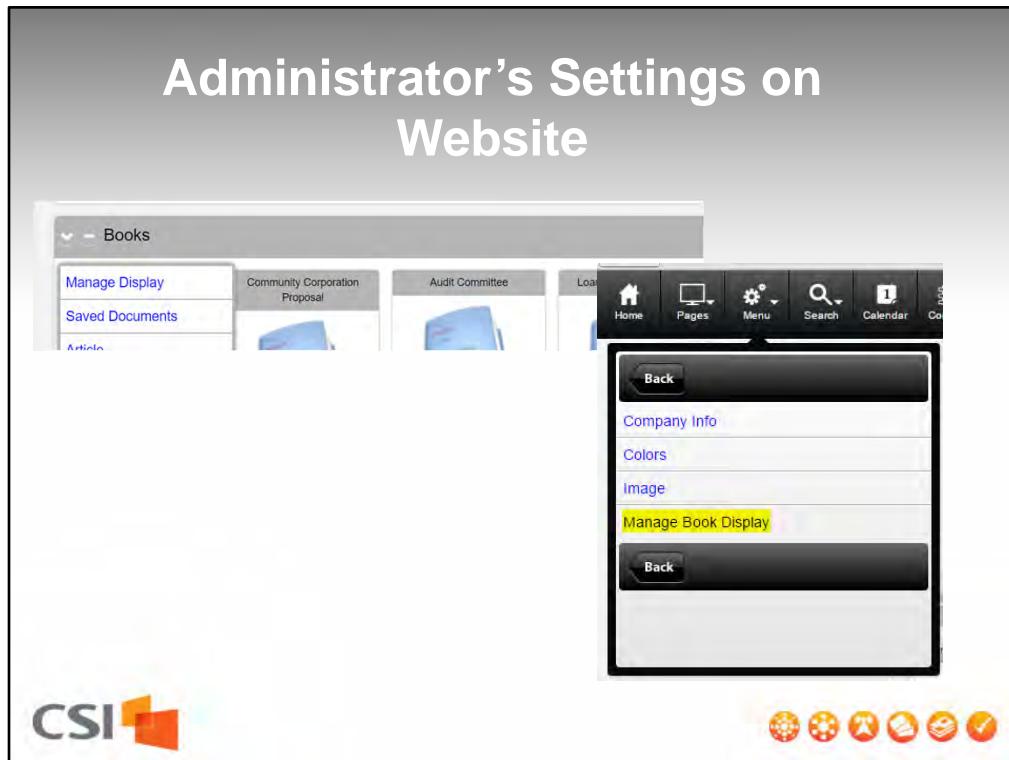


When editing a page on your website, there are 2 options that must be set in order to make a page into a book.

First, the page must be published. This is done by selecting the **Show in Navigation** checkbox.

Second, the option to **Mark the page as a book and allow tagging** must be selected.

Book Expiration allows you to set the date & time for when you want the book to be removed from the app & home page.



Administrators manage which of these books are displayed in the app and/or the website.

The option to **Manage Display** is located in the drop down menu in the Books section on your site's home page AND in the Site Administration Menu icon under Configure Site and then Site Content.

Administrator's Settings on Website

Web - accessible from the full website only.

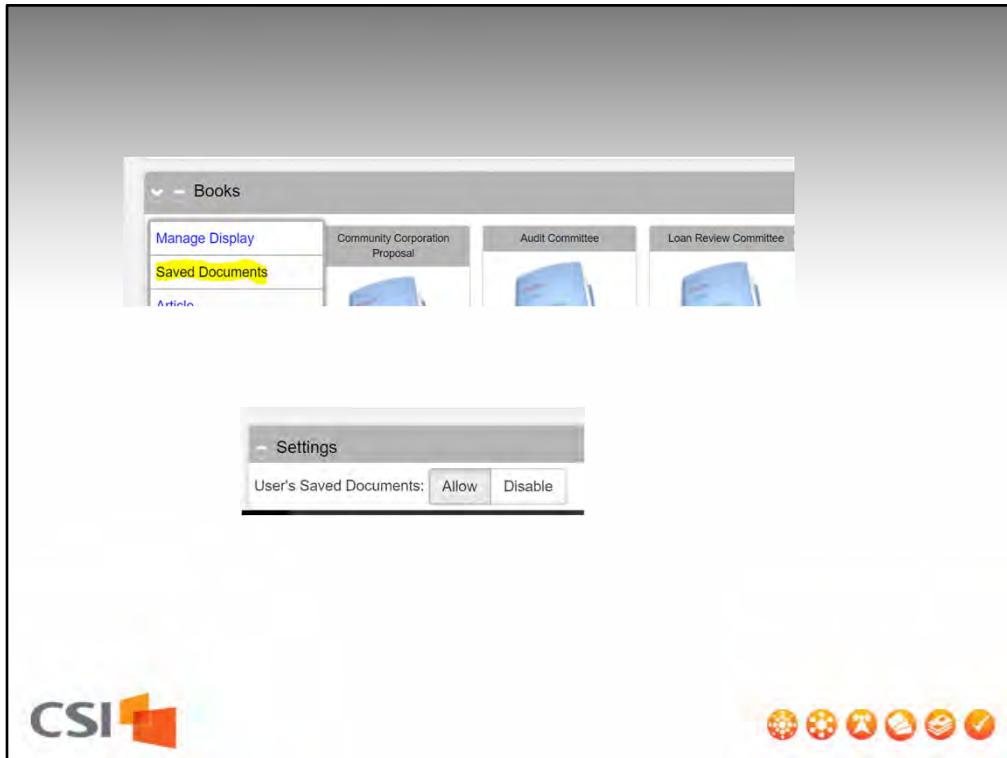
App - accessible from the app only.

Both - accessible from the full website and the app.

Book	Display
Current Board Meeting Materials	<input type="radio"/> Web <input type="radio"/> App <input checked="" type="radio"/> Both
Community Corporation Proposal	<input type="radio"/> Web <input type="radio"/> App <input checked="" type="radio"/> Both
Audit Committee	<input type="radio"/> Web <input type="radio"/> App <input checked="" type="radio"/> Both
Loan Review Committee	<input type="radio"/> Web <input type="radio"/> App <input checked="" type="radio"/> Both

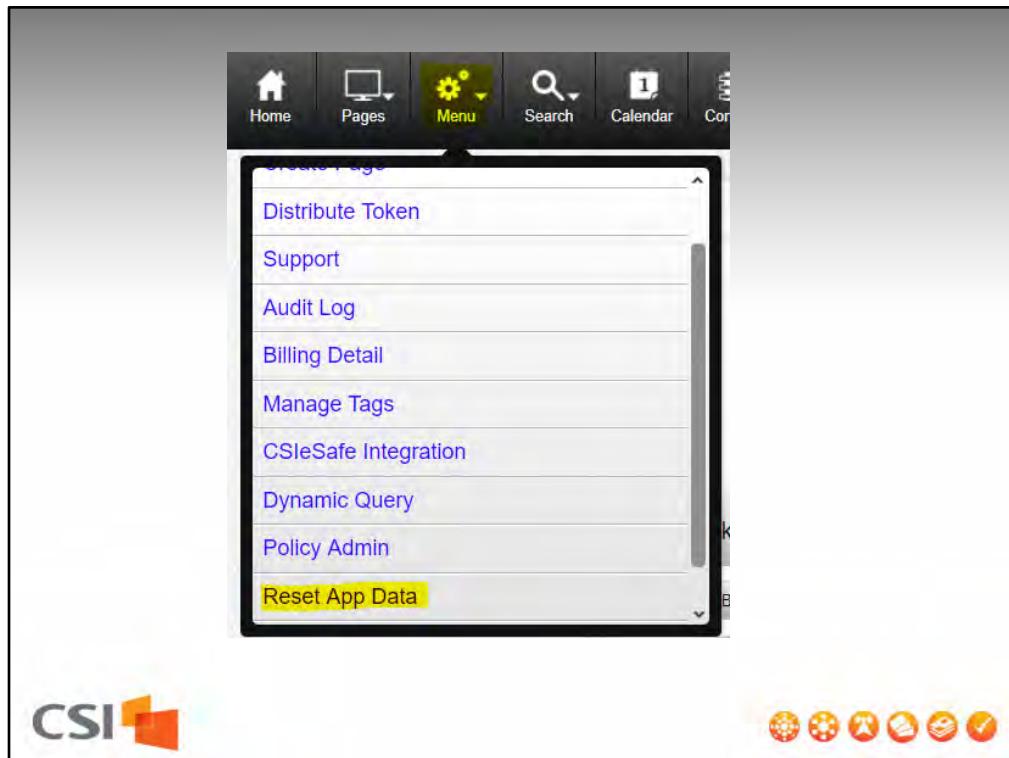


Once in the Manage Display screen, administrators select the option that corresponds to the display appropriate for each book. The default setting is BOTH.



Using the **Saved Documents** option located in the Books drop down menu on the website, Administrators can either enable the ability for users to save documents or disable that option.

By default, the option is set to Allow.



Site administrators can reset an account and remove all Secure Connect app content from a device. This option can be used, for example, if a device is lost or stolen. To access, go to Menu and **Reset App Data**.

Remote Reset App Data

This action will wipe out all CSI SecureConnect data on the user's device.

Reload

Show 10 entries

Search:

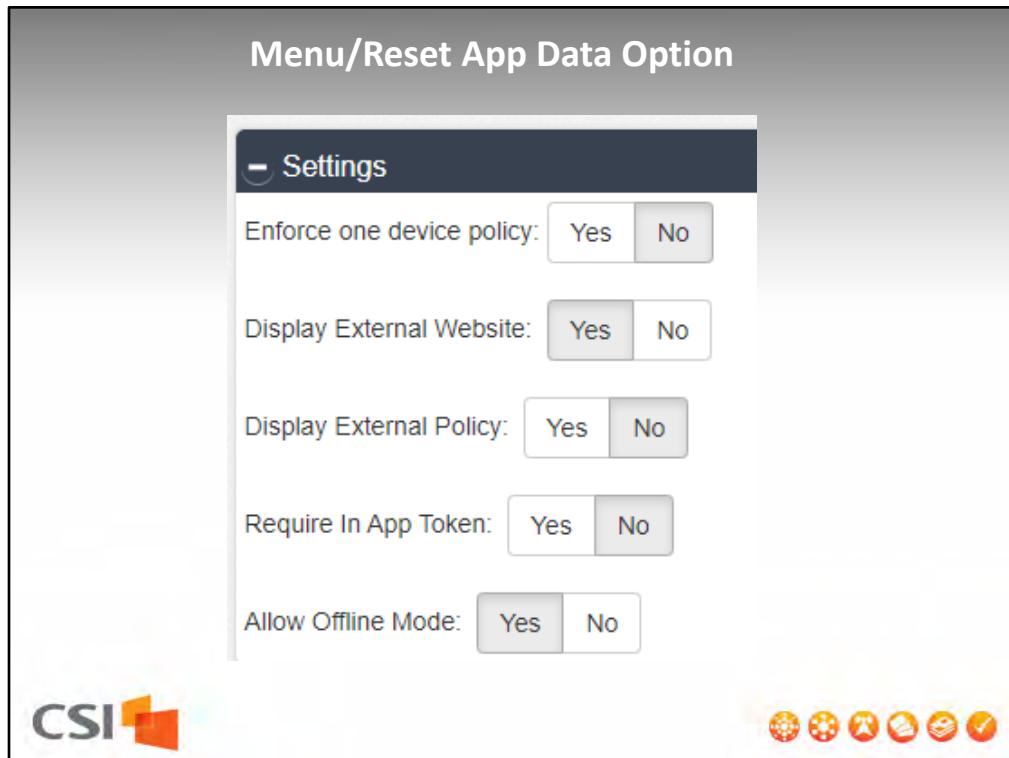
Name	Email	Reset Data	Release Device	Last Reset	Multiple Access Attempts
Bill Evers	bevers@csiweb.com; 2199298337@vtex.com	Reset data from this device	Release Device without resetting	Jun 14, 2013 15:40:11	
Board Portal Guest	myemailaddr@csiweb.com	Reset data from this device	Release Device without resetting	Jun 14, 2013 15:48:41	
Christy Rikel	christy.rikel@csiweb.com	Reset data from this device	Release Device without resetting		
Jared Riley	jriley@csiweb.com	User not tied to a device	User not tied to a device		
Jeremy Patrick		Reset data from this device	Release Device without resetting		

Showing 1 to 5 of 5 entries

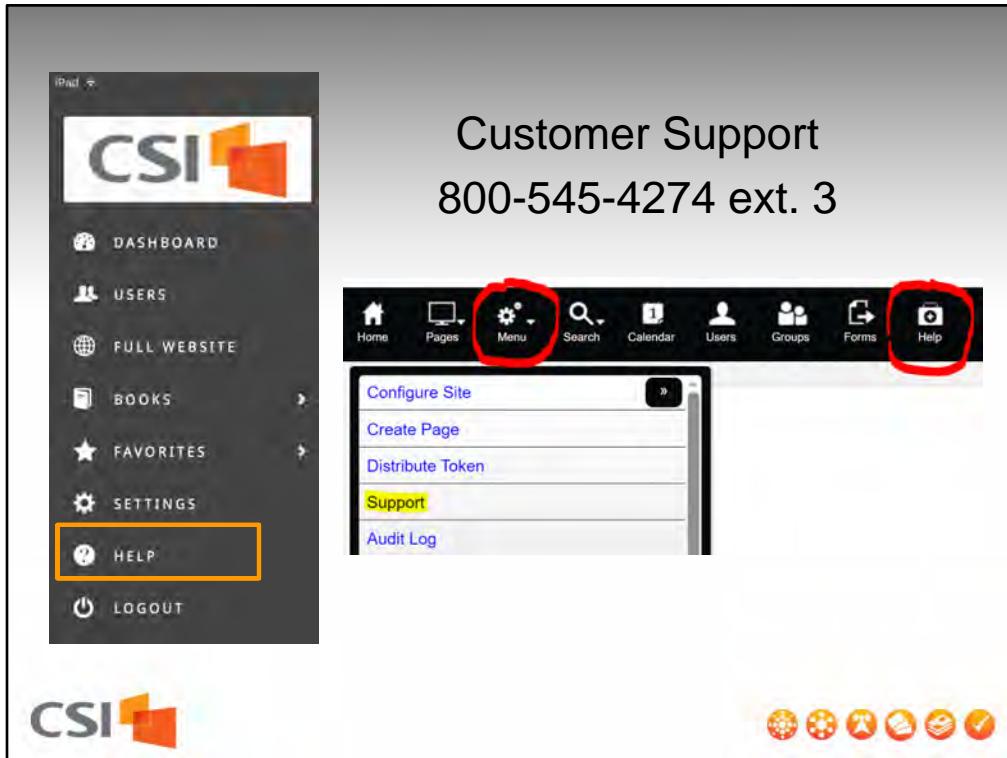
Click **Reset data from this device** next to the appropriate user's name to remove all CSI Secure Connect content from the device.

If your organization doesn't allow multiple devices per user, you will need to release the original device before the user can log into the app on another one.

To release a device, click **Release Device without resetting** next to the appropriate user's name



- Administrators manage the multiple device policy by selecting **YES** to enforce one device per user or **NO** to allow multiple devices per user. The default setting is YES.
- The option to **Display External Website** can allow users to access the Full Website from within the app. The default setting is YES.
- **Require In App Token** settings determines if the user will need a security token installed on the device in order to access information in the app, even the dashboard. The default setting is NO.
- **Allow Offline Mode** is an admin setting for all users that determines if the users can access the Dashboard if they are not connected to Wi-Fi. The default setting is YES.



Once again, the app is a free download from the Apple App Store and the Google Play Store.

For questions, use the Support option to submit a ticket, the **Help** page on your website contains training videos, the in-app HELP documentation area or you can contact customer support using the toll free number.