



User Manual

For Administrators and Owners of the Boards

Featured by Customer Success Team

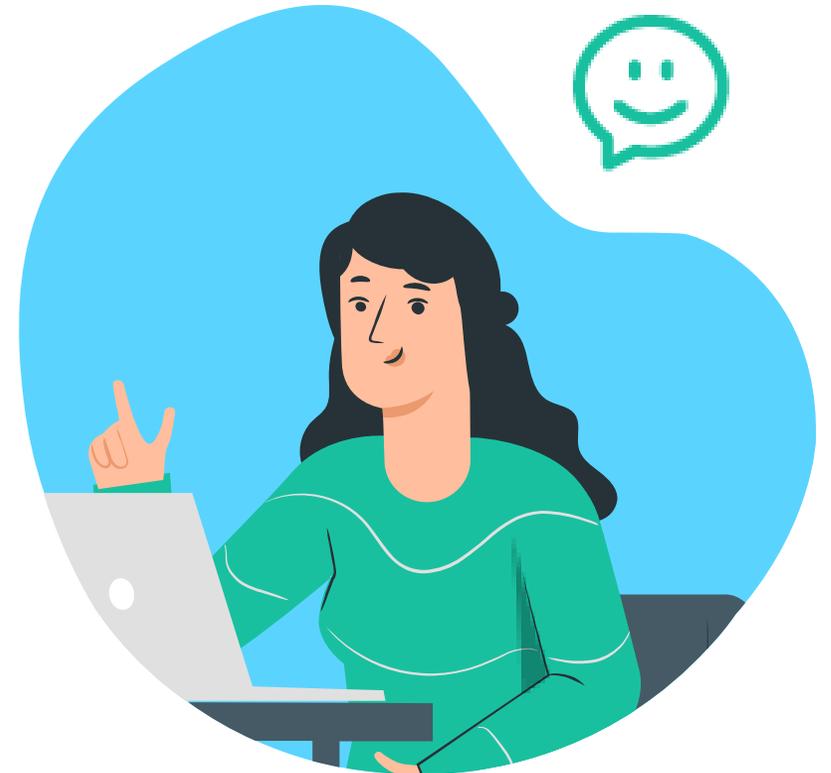


Welcome to the User Manual for administrators and owners of the boards.

We are Erika and Wendy, responsible for the support here at Atlas! You can find us at Online Support within the portal (Monday to Friday from 09:00 am to 06:00 pm) or through the following e-mails: erika.oliveira@atlasgov.com or wendy.marisol@atlasgov.com

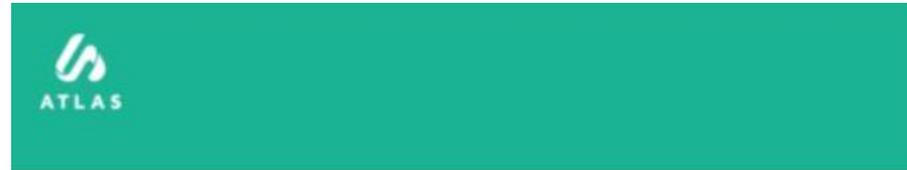
We created this manual to be your guide in your first steps of using the portal! But, you already know where to find us in case you have any questions :)

Best regards!



Register

Atlas registration steps



The board portal Atlas Governance was hired to prepare their meetings, consolidate reading materials and follow up with the decisions taken by the board of directors and committees.

You have received an invitation to join.

Please, complete your registration at the following link, using your e-mail address

<https://www.atlasgov.com/register/edf59517>

We hope Atlas will support you through your organization's governance processes.

Best Regards,

Atlas Governance LTDA

OBS.:

Remember that the invitation to enter the portal Atlas must be done by another user and approved by the system Administrator of the company.

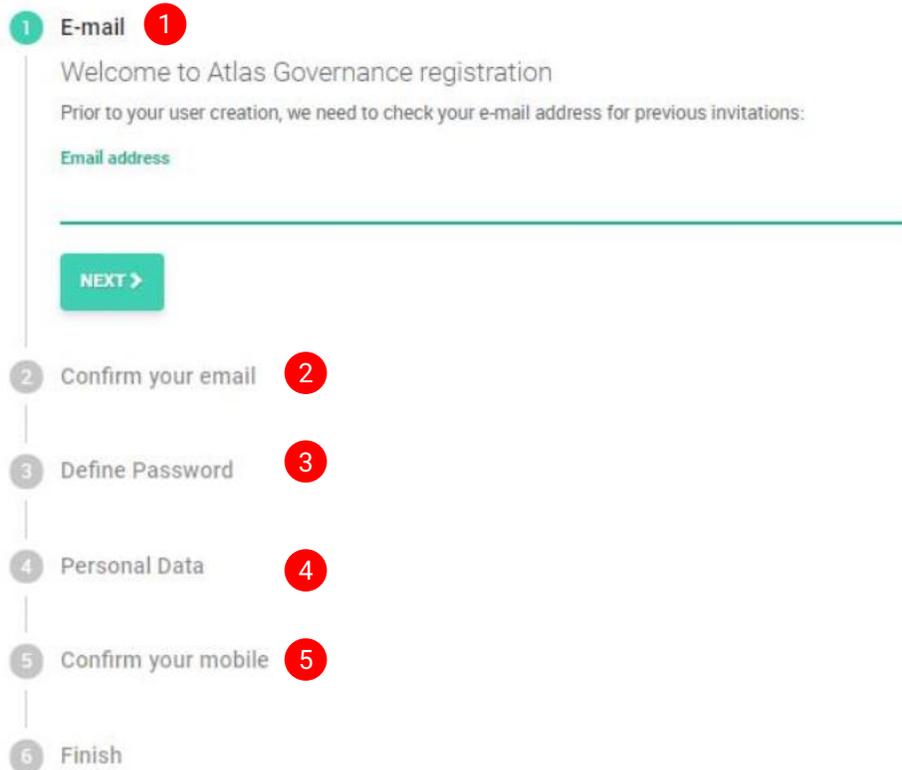
There are two ways to register on Atlas.

The first is to be invited and receive the invitation via e-mail.

The second is directly in the link www.atlasgov.com/register

Register

Atlas registration steps



Step 1: Enter Atlas and click on “Register” or in the link that you received;

Step 2: Confirm your e-mail: A code will appear in your email;

Passo 3: Set your password;

Passo 4: Add your personal data (First name, Last name and Mobile number);

Passo 5: Confirm your number (an SMS with the code will be sent to your cell phone).

Home

Know the Home screen shortcuts

The screenshot shows the ATLAS Governance Home screen with various shortcuts and features. The ATLAS logo is in the top left. A sidebar on the left contains navigation items: Home (1), Boards, Meetings, Projects, Inbox, Notes, Knowledge Base, and Help. The main content area includes a search bar (2), an action creation field (3), an Inbox card (4) with 10 items, and an Outbox card (5) with 0 items. Below these are 'Upcoming meetings' (6) and 'Past meetings' (2) sections. The 'Upcoming meetings' section shows a meeting on 08 Sep: 'Atlas - Conselho de Administração 21° RCA in a month' with an 'Agenda definition' button. The 'Past meetings' section shows a meeting on July 7, 2021: 'Atlas - Conselho de Administração "Reunião Ordinária" meeting call'. The right sidebar shows 'Announcements' (7) and 'Latest updates' (8) sections. The 'Announcements' section shows two items: 'Atlas - Conselho de Administração "Reunião Ordinária 15º" meeting minute' and 'Atlas - Conselho de Administração "Reunião Ordinária 15º" meeting call'. The 'Latest updates' section shows two items: 'Atlas - Conselho de Administração "21° RCA" meeting call' and 'Atlas - Conselho de Administração "Reunião Ordinária" meeting call'. A 'Suporte' button is visible at the bottom right of the right sidebar.

1. System menu;
2. Search system that locates any content within Atlas;
3. Shortcut to create an action to a member of a Board;
4. Shortcut to check your backlogs (tasks, polls and accesses - if you are an administrator);
5. Shortcut to check pending requests to other people;
6. List of upcoming scheduled meetings and past meetings;
7. List of announcements sent from the Boards;
8. Last activities done by the members;
9. Chat shortcut to chat with board members;
10. Tool to filter the Boards you participate in;
11. Access your settings and the Administrator screen;
12. Online support with the Customer Success team.

Home

Know the menu



Home 1

Boards 2

Meetings 3

Projects 4

Inbox 5

Notes 6

Knowledge Base 7

Help 8

1. Home – System start screen, allows access to the shortcuts to the main information of the Boards you participate;

2. Boards – Working groups you are part of (all content is exclusive to members);

3. Meetings – All the history of past and future meetings of the Boards;

4. Projects – Are sets of actions centralized in a Project, There you can follow up and have a macro view of your progress (which demands are finalized, in progress or open);

5. Inbox – All pending cases involving the user's participation as tasks or polls;

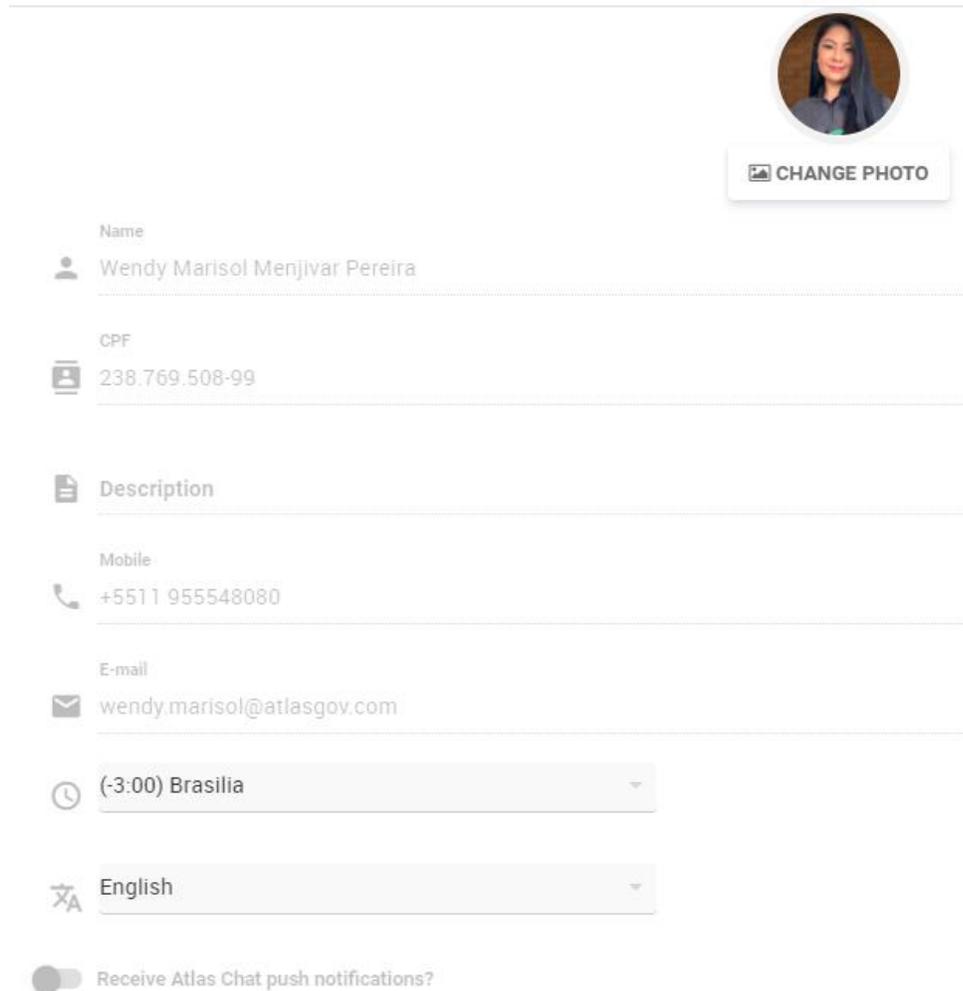
6. Notas – It's a notepad (all content is private and saved automatically), here you can also share your note with another member of your board;

7. Knowledge base – It is the Board file directory, can contain static or normative files of your workgroup;

8. Help – Portal Help Center, contains articles about the features, videos and channels through which you can talk to our Customer Success team.

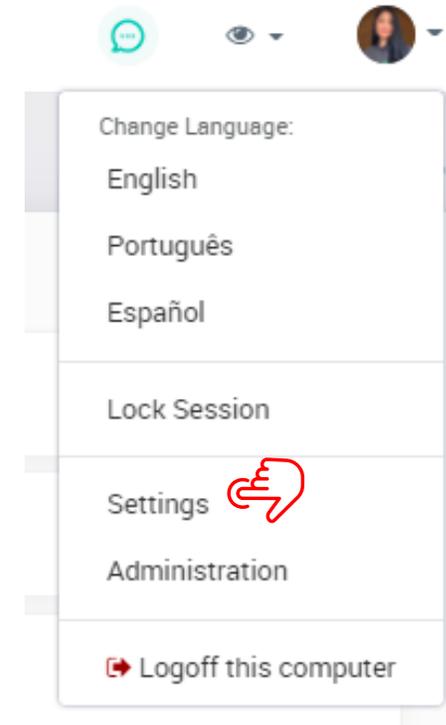
User functions

Here the user can change his photo, name, time zone, notification in the App and language.



A screenshot of a user profile page. At the top right is a circular profile picture of a woman with a 'CHANGE PHOTO' button below it. The profile information is as follows:

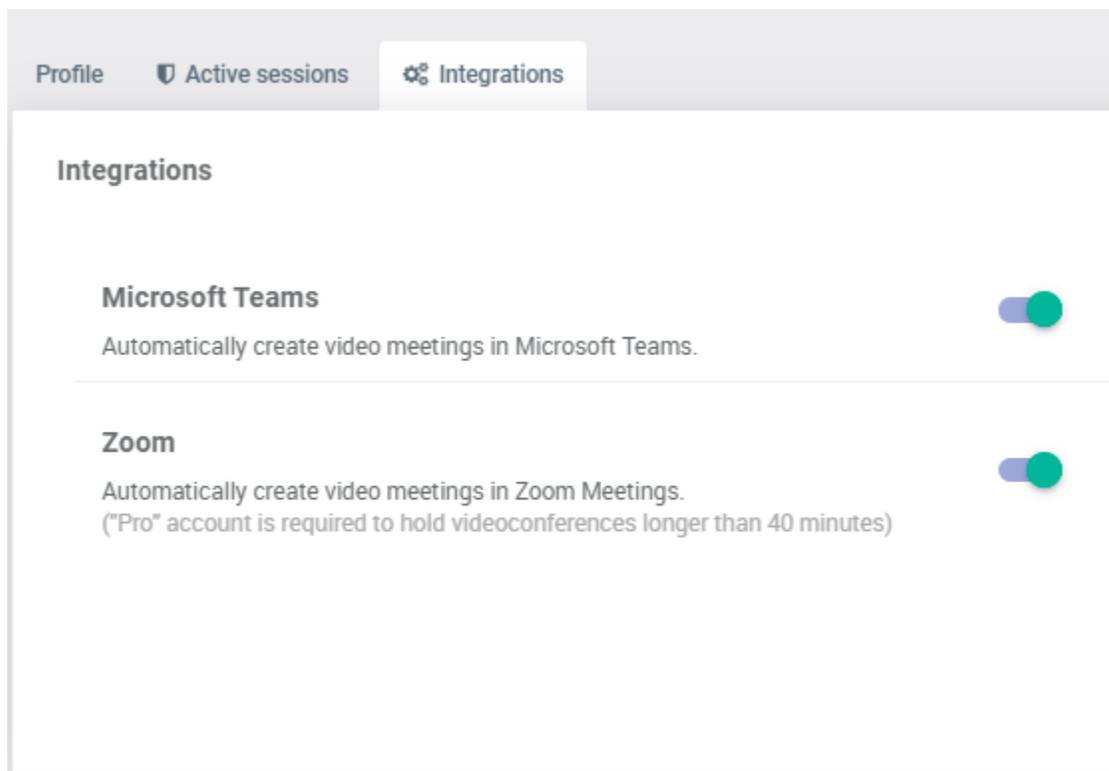
- Name: Wendy Marisol Menjivar Pereira
- CPF: 238.769.508-99
- Description: (empty field)
- Mobile: +5511 955548080
- E-mail: wendy.marisol@atlasgov.com
- Time zone: (-3:00) Brasilia
- Language: English
- Receive Atlas Chat push notifications?: (toggle switch is off)



All user profile edits such as (Name and Photo) can be done by clicking on the icon and accessing its settings. If you want to change your phone number or email address you should refer to the Adm of your account.

Integrations

How to enable Microsoft Teams and Zoom

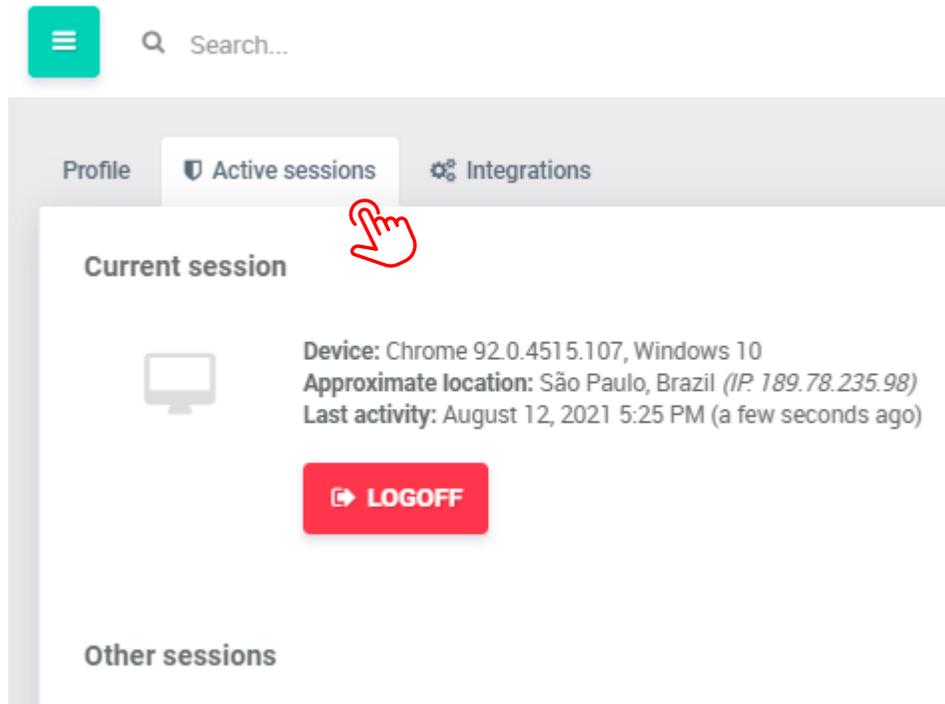


The integration of Microsoft Teams in Atlas Governance allows the creation of automated video conferences during the creation of meetings on the Boards.

**To enable Teams is necessary
OBS.: a prior authorization of the IT
team of your company .**

Active sessions

Check any devices your account was accessed



It is also a way for the user to be able to disconnect their account from other devices that can be forgotten when logging out.

Administrator function

Editing of cell phone number, CPF and e-mail



 CHANGE PHOTO

Wendy Marisol Menjivar Pereira 

ID: 8582

Description:

E-mail:

wendy.marisol@atlasgov.com 

Mobile:

 +55  11 95554-8080

CPF:

238.769.508-99 

Only the system administrator can alter a user's cell phone number, e-mail and cpf. To do this, you must enter the Board, select the user, click on the photo and select the pencil icon next to the information you want to edit. To finish, just click on ENTER.

Administrator Screen

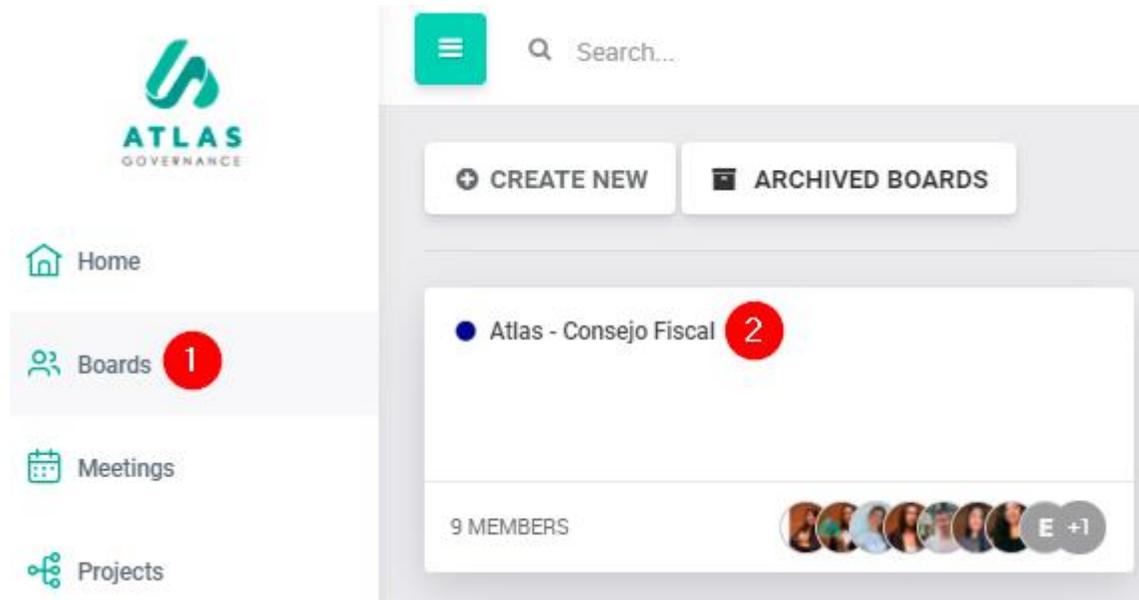
Access to the exclusive administrator screen

The screenshot displays the Administrator Screen interface. On the left, a sidebar contains navigation items: Main (2), Single Sign-On, Users (3), Administrators (4), Backup (5), Boards & Projects (6), and Audit Log (7). The main content area is divided into sections: 'Details' showing Client Id: 1, Name: Atlas, Full name: Atlas Governance, and Tax Number; 'Logo' with a 'No image selected' placeholder and 'FROM FILE' and 'RESET' buttons; and 'Color' with a 'Current color' field and 'PICK COLOR' and 'RESET' buttons. A user profile dropdown menu is open in the top right, showing options for 'Change Language' (English, Português, Español), 'Lock Session', 'Settings', 'Administration' (highlighted with a red box and a hand cursor), and 'Logoff this computer'. A 'Soporte' button is visible in the bottom right corner.

1. Access to the Adm screen;
2. Alter the logo
3. Full access to the relationship of active users, blocked, pending registrations and invitations for approval;
4. List of all system administrators;
5. Request for complete backup of the portal;
6. List of all board titles and projects created;
7. System audit log;

Board

Access your Boards



1. Everything in Atlas turns around the Boards, are the working groups you are part of, you will have access to Boards in the Menu bar on the left side;
2. By clicking on the Board you wish to view, you will have access to the group home with key information from it: dates of upcoming meetings, as well as access to meetings that have already taken place; list of announcements sent; a calendar with all meetings planned; and who are the members who participate with you on the board, above the calendar.

Board

Know your Board

The screenshot shows a Microsoft Teams Board interface for a group named "Conselho de Administração". At the top, there is a search bar and a profile picture. Below this, the board title "Conselho de Administração" is displayed with a description field. To the right of the title, there are two sections: "Owners" with 4 members and "Members" with 5 members. The main content area is divided into two tabs: "Upcoming meetings" (with 1 item) and "Past meetings" (with 4 items). The "Upcoming meetings" tab shows a meeting on "08 Sep" titled "Atlas - Conselho de Administração 21° RCA in a month" with an "Agenda definition" button. The "Announcements" tab (with 3 items) shows a list of updates: "July 20, 2021" with two items ("Reunião Ordinária 15°" meeting minute and "Reunião Ordinária 15°" meeting call) and "July 19, 2021" with one item ("21° RCA" meeting call). A vertical blue bar on the right side of the screenshot highlights the list of announcements.

1. Upcoming Meetings;
2. Past meetings;
3. A list of announcements sent (convening the meeting, minutes of the meeting and notices issued by the owners);
4. Owners who manage the group;
5. Members view all content within the Board;
6. Place where it will be possible to view the Board Performance and Backup that can be requested at any time.

Board: Members and Owners

What is the difference between members and owners of the Board?

Owners

They are the users of the board that besides having access to all the content, will manage the board. They can create and organize meetings, include and edit group members.

Members

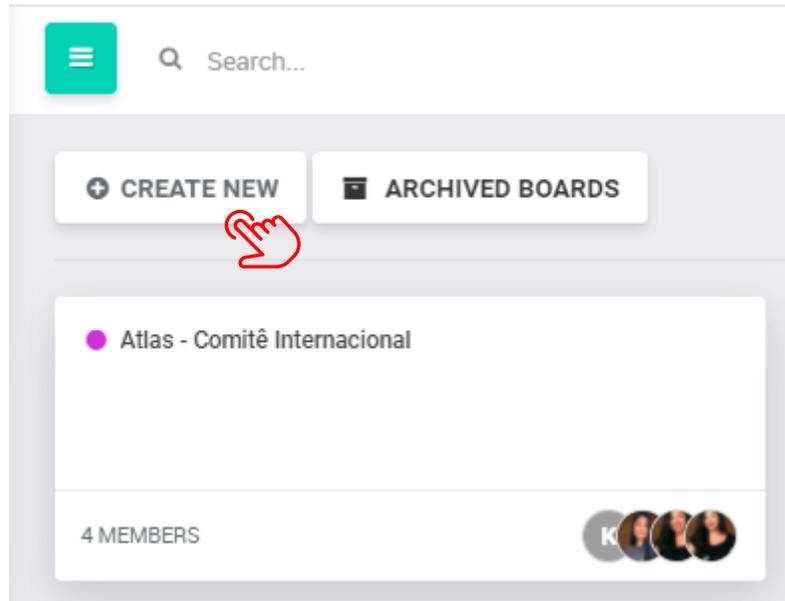
They are the users who will have access to the contents of the Board and will be able to participate in the meetings, votes, actions and other activities of the group.

How to create a Board?

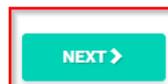
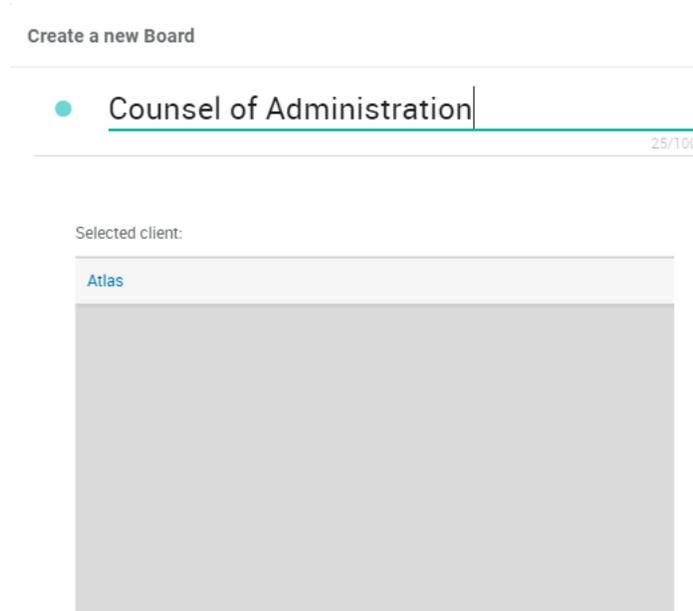
See how do to it:



Step 1:



Step 2:

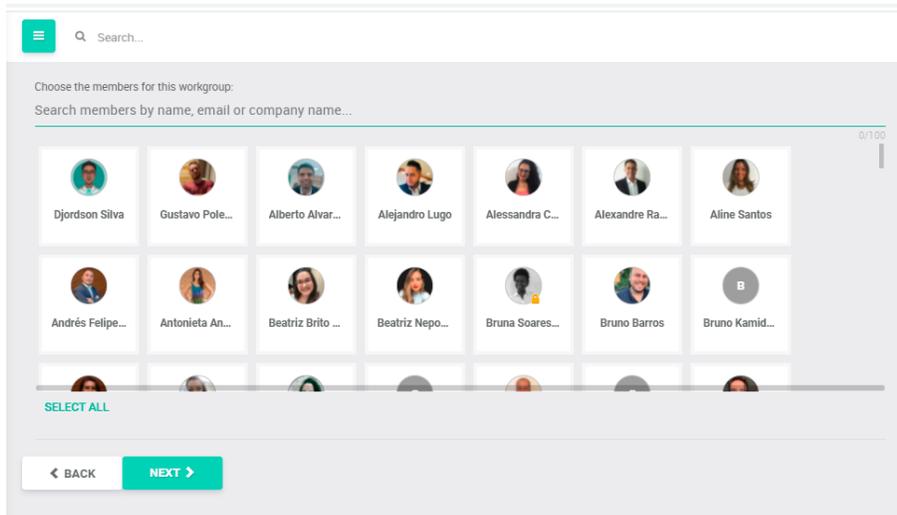


Step 1: Go to the boards page and click "Create New"

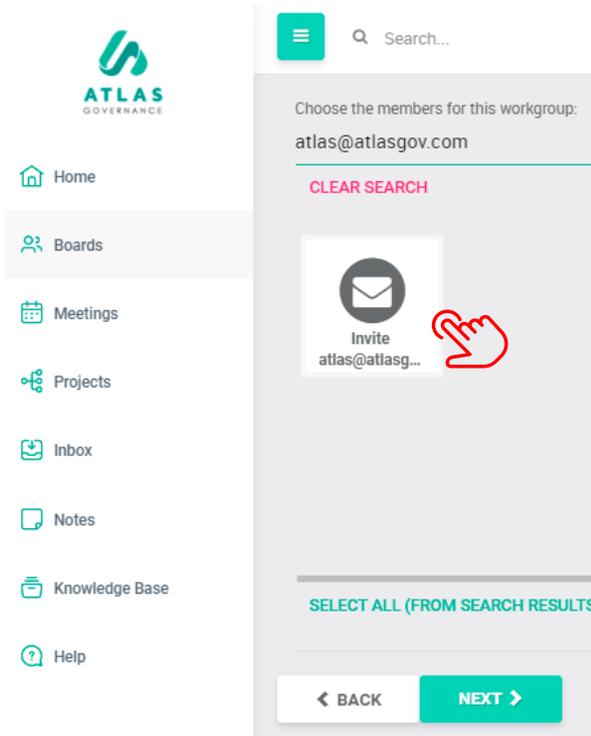
Step 2: Name the board and click "Next" to add members

How to create a Board?

Step 3:



Step 4:



Step 3: If the person is already registered on the portal on another board, a photo of the person will appear, then just select;

Step 4: If the person is a new user, type the login e-mail and click "invite" below;

How to create a Board?

Step 5:

Confirmation

Name ● Counsel of Administration

Users

- Wendy Marisol Menjivar Pereira
- Erika Silva Oliveira
- Karine Fernandes Pereira
- Priscila Viegas | CS

Do you want to proceed?

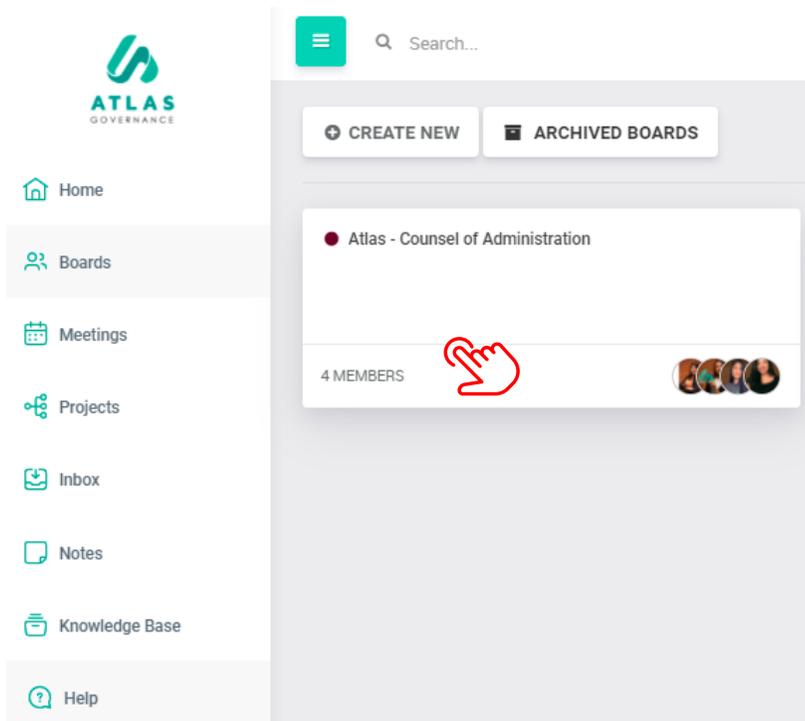
[← BACK](#) [CREATE](#)

Step 5: To finish creating the board, click "Next", confirm the included data and click "Create".

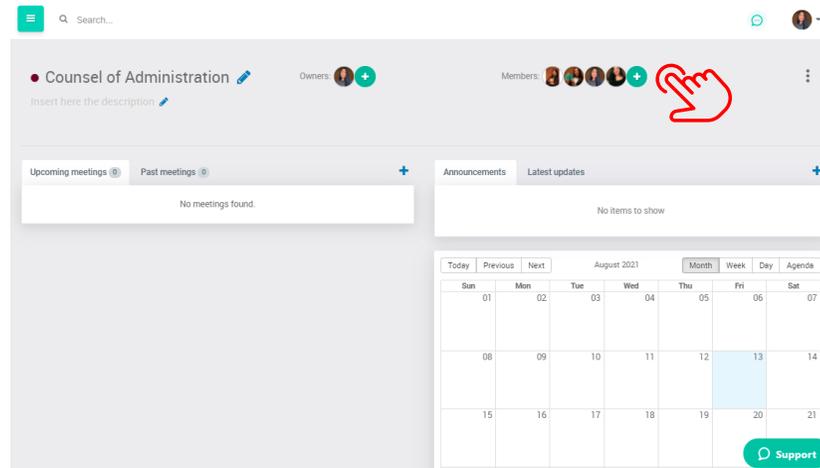
Done! Now that you created the board, you can manage members, create meetings, open actions and share documents in the knowledge base.

How to invite people to participate in Atlas?

Step 1:



Step 2:



See how to do it:



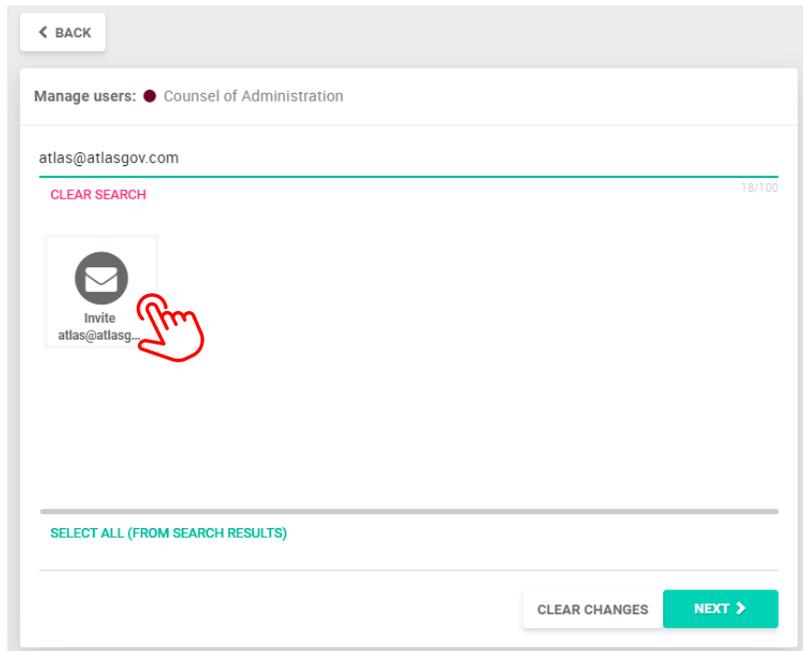
You can only invite members to participate in Atlas through an open board or project; only board owners can invite new members.

Step 1: Go to the boards or projects page and choose where you want to make the invitation;

Step 2: Click on "+" in the member relation;

How to invite people to participate in Atlas?

Step 3 and 4:



Manage users: ● Counsel of Administration

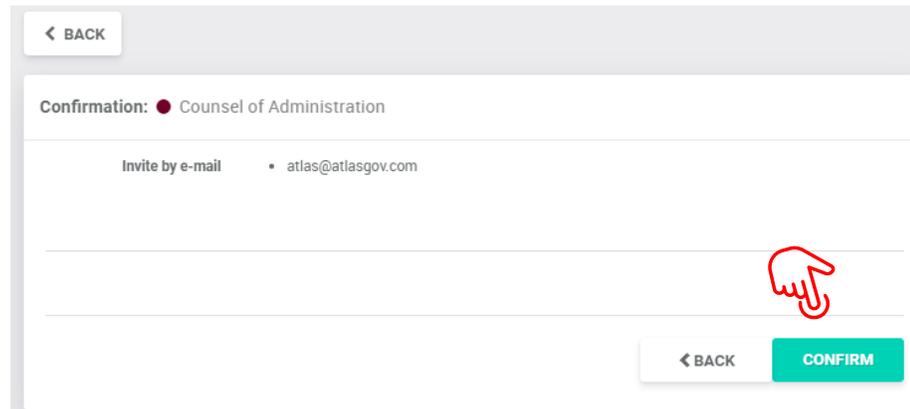
atlas@atlasgov.com 18/100

CLEAR SEARCH

Invite
atlas@atlasg...

SELECT ALL (FROM SEARCH RESULTS)

CLEAR CHANGES NEXT >



Confirmation: ● Counsel of Administration

Invite by e-mail • atlas@atlasgov.com

< BACK CONFIRM

Step 3: Type the login e-mail and click on "Invite" below and then on "Next";

Step 4: To end the invitation, click on "Confirm"
Remember that the new member will only be able to register after the approval of the system administrator.

Meetings

Check your meetings, agenda materials and the minute

The screenshot shows a meeting interface for 'RDE Semanal'. At the top, it indicates the meeting was created on August 3, 2021, at 4:18 PM by Wendy Marisol Menjivar Pereira. The status is 'Published minutes'. The location is 'Not set', and the date is August 7, 2021, from 9:00 AM to 9:30 AM (5 days ago). The owners and attendees are listed with profile pictures. The agenda section shows one item: 'aprobacion del acta' (1), scheduled for 9:00 AM to 9:15 AM (15min). On the right side, there is a sidebar with 'Options' (REOPEN MEETING), 'Notes' (MEETING NOTES 3), and 'Minutes' (VIEW MINUTES 4). A 'SIGNATURE SUMMARY' option is also visible. Red circles with numbers 1, 2, 3, and 4 are overlaid on the interface to highlight specific elements: 1 on the agenda item, 2 on the bluebook icon, 3 on the meeting notes button, and 4 on the view minutes button.

You can access your meetings via Home, Meeting's menu or within a specific board. Inside the meeting screen you will have access:

1. To the items of the agenda;
2. To the items of the agenda, by clicking on the bluebook which is the combination of all the attachments within the items of the agenda of the meeting, in a unique pdf with the watermark of the person doing the download on all pages. It is represented by the Bluebook;
3. To your notes (remember that your annotations are private);
4. To the minutes when it is published (remember that you will be notified by e-mail to each change of status of the meeting as convocation and published minutes)

Meetings

View voting and actions of the meeting

Atlas - Directoria Ejecutiva
RDE Semanal 1
Created in June 21, 2021 8:09 PM by Wendy Marisol Menjivar Pereira

Status: Ready
Location:
Video conference Join video conference 2
Date: June 26, 2021 9:00 AM - 9:30 AM (a month ago)

Owners:

Attendees:

Guests:

Agenda: 3

- Proyectos de la semana**
9:00 AM ~ 9:15 AM - 15min
- Puntos importantes de la semana**
9:15 AM ~ 9:30 AM - 15min

Voting 4

Atlas - Directoria Ejecutiva
Minute approval
Awaiting Votes
August 9, 2021 - in 4 hours

VOTERS	VOTES
2	0

Meeting Actions 5

Atlas - Directoria Ejecutiva

Add material
2 hours ago

1. This is the internal part of the meeting where all the information about it is located;
2. By clicking on "Join video conference" you will have access to the meeting channel;
3. Here are all the subjects addressed during the meeting;

4. The votes - are resolutions related to the meeting;
5. Actions of the meeting - are demands that arose from the meeting and are recorded so that the follow-up can be done.

¿How to create a meeting?

See how do it:



Step 1:

The screenshot shows the ATLAS GOVERNANCE interface. On the left is a navigation menu with options: Home, Boards, Meetings (highlighted), Projects, Inbox, Notes, Knowledge Base, and Help. The main content area is titled 'Meetings' and has a search bar. Below the search bar is a '+ CREATE' button, which is highlighted with a red hand icon. There are two tabs: 'Upcoming meetings 2' and 'Past meetings 4'. The 'Upcoming meetings' tab is active and shows two items:

Date	Meeting Name	Days	Action
28 Aug	Atlas – Conselho de Administração Reunião Ordinária 15ª	in 12 days	Agenda definition
08 Sep	Atlas – Conselho de Administração 21ª RCA	in 23 days	Agenda definition

Step 2:

The screenshot shows the 'Create a new meeting' dialog box. It has a search bar 'Search boards by name...' and a grid of board options. A red hand icon points to the 'NEXT' button at the bottom right.

Choose a board:

Search boards by name...

Board Name	Status
[Atlas] Customer S... Customer Success	Selected
[Atlas] Customer S... SUPORTE	Selected
[Atlas] Customer S... Treinamento BDR's	Selected
Atlas Comitê de Conducta	Not Selected
Atlas Comitê de Cultura	Not Selected
Atlas Comitê Internacion...	Not Selected
Atlas Consejo Fiscal	Not Selected
Atlas Conselho de Admini...	Not Selected
Atlas Conselho de Admini...	Not Selected
Atlas Counsel of Adminis...	Selected
Atlas Customer Success	Not Selected
Atlas Customer Success -...	Not Selected
Atlas Directoria Ejecuti...	Not Selected
Atlas Projectos Mensuale...	Not Selected
Atlas Projectos Mensuale...	Not Selected

Step 1: Go to the meetings page and click "Create"

Step 2: Choose the board on which you want to create a meeting and click "Next"

¿How to Create a Meeting?

Step 3:

Create a new meeting

Date:

August 2021						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Time: 09:00

Select duration: 04 : 00

The meeting will be from 9:00 AM to 1:00 PM

Hour Minutes

← PREVIOUS

NEXT →

Step 4 and 5:

Create a new meeting

Title

Meeting

Location: 7/255

Video conference:

Microsoft Teams Zoom Atlas Meet (beta) External link

The conference URL will be available after the meeting creation.

Who will attend this meeting?

send invitation to attendees:

← PREVIOUS

CREATE →

Step 3: Define the date, start and duration of the meeting; Remember that the duration time is the time that will be set in the agenda of the attendees when the invite is sent.

Step 4: Create a title and set the place where the meeting will be. Below select the desired video conference option (remember that Atlas has integration with Teams and Zoom and you can create the link for your meeting at that time; then decide if the attendees should receive the request through Atlas.

(Remember that, if you do not send the invite through Atlas, even so the selected participants will be notified when the call is done, and the minutes published;

Step 5: Finish by clicking "Create"; Done! Now your meeting is created, you can add the items on the agenda, define the owners, manage permissions and open votings. Remember that only board owners can create new meetings.

¿HOW TO CREATE THE AGENDA OF THE MEETING?

See how to it:



Step 1:

Atlas - Counsel of Administration
Meeting
Created in August 16, 2021 6:46 PM by Wendy Marisol Menjivar Pereira

Status: Agenda definition
Location:
Video conference: Join video conference
Date: August 16, 2021 9:00 AM - 1:00 PM (10 hours ago)
Duration: 04:00 ?

Owners: [Avatar] +
Attendees: [Avatar] [Avatar] [Avatar] [Avatar] +
Guests: +

Agenda:
No items added yet.

+ ADD AGENDA ITEM IMPORT FOLDERS IMPORT MEETING

Step 2:

Agenda:
No items added yet.

Agenda item title

0/1000

Break

CANCEL NEXT >

+ ADD AGENDA ITEM IMPORT FOLDERS IMPORT MEETING

Go to the meeting where you want to create agenda items

Step 1: Click on "Add agenda item";

Step 2: type the title of the agenda item

¿HOW TO CREATE THE AGENDA OF THE MEETING?

Step 3:

Select user

Search members by name, email or company name...

Erika Silva Oliv... Karine Fernandes... Priscila Viegas ... 0/50

Wendy Marisol Me... ✓

← BACK NEXT →

Step 4:

Select duration:

15

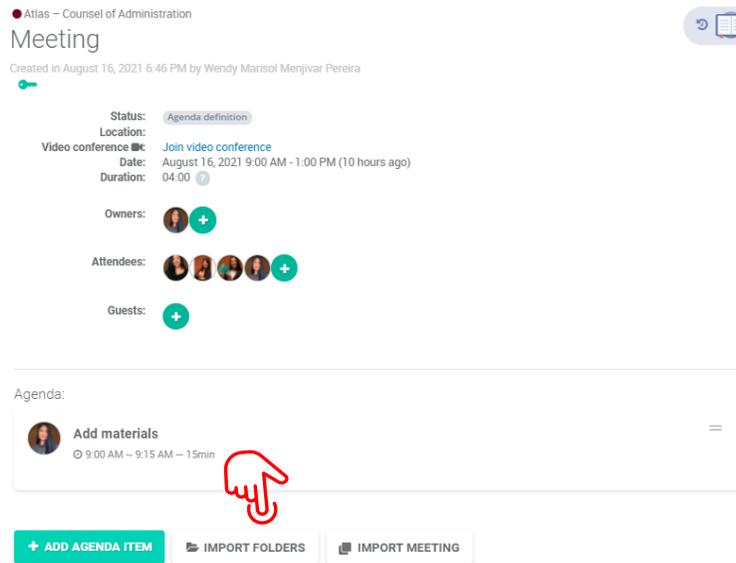
← BACK FINISH

Step 3: Click "Next" and select who will be responsible for that order;

Step 4: Select the duration of the item and click "Finish". For each item of the defined agenda, you can comment and upload files.

¿HOW TO IMPORT FOLDERS TO THE AGENDA OF THE MEETING?

Step 1:



Atlas - Counsel of Administration
Meeting
Created in August 16, 2021 6:46 PM by Wendy Marisol Menjivar Pereira

Status: Agenda definition
Location: Video conference [Join video conference](#)
Date: August 16, 2021 9:00 AM - 1:00 PM (10 hours ago)
Duration: 04:00

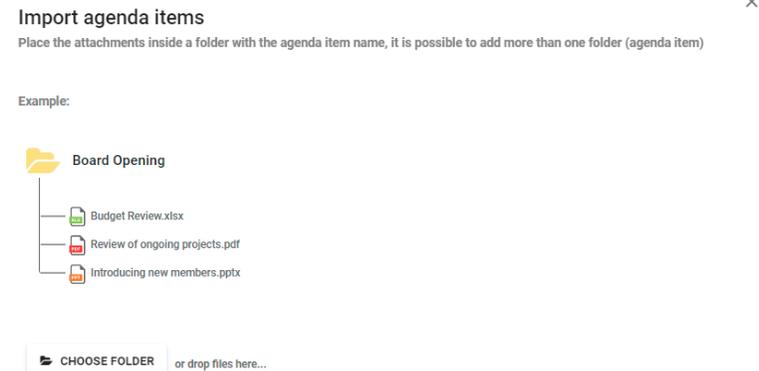
Owners: [Avatar] +
Attendees: [Avatar] [Avatar] [Avatar] [Avatar] +
Guests: +

Agenda:

- [Avatar] Add materials
9:00 AM - 9:15 AM - 15min

+ ADD AGENDA ITEM | IMPORT FOLDERS | IMPORT MEETING

Step 2:



Import agenda items
Place the attachments inside a folder with the agenda item name, it is possible to add more than one folder (agenda item)

Example:

- Board Opening
 - Budget Review.xlsx
 - Review of ongoing projects.pdf
 - Introducing new members.pptx

CHOOSE FOLDER or drop files here...

In this option, select the folder and all its attachments will go together at once. The system will automatically create the item of the order of the day and can make any edition if necessary, just click on the title of the agenda of the day.

Step 1: Click on "Import Folders";

Step 2: Click the "Choose Folder" button

¿How to import the agenda of a past meeting to an upcoming meeting?

Step 1:

Atlas – Directoria Ejecutiva
RDE Semanal
Created in August 17, 2021 8:03 PM by Wendy Marisol Menjivar Pereira

Status: Agenda definition

Location: [Join video conference](#)

Video conference: [Join video conference](#)

Date: August 28, 2021 9:00 AM - 11:30 AM (in 11 days)

Duration: 02:30

Owners:  +

Attendees:  +

Guests:  +

Agenda:
No items added yet.

+ ADD AGENDA ITEM

IMPORT FOLDERS

IMPORT MEETING



Step 2:

Import Meeting

Search Meeting...

Date	Title	Status
15 Jun	RDE Junio 2021 2 months ago	Published minutes
26 Jun	RDE Semanal 2 months ago	Ready
07 Aug	RDE Semanal 10 days ago	Published minutes

OBS.: To import a meeting, the status must be "Ready", it is not possible to import meetings with the status "Defining Topics"

This functionality will help if you have issues that are repeated in meetings or if you want to add topics from a past meeting.

Step 1: Click "Import Meeting"

Step 2: Select one or more items you want to bring for the upcoming meeting (it is also possible to import comments or attachments);

¿How to invite an external member to a meeting agenda?

See how to do it:



Step 1:

Atlas – Directoria Ejecutiva
RDE Semanal
Created in August 17, 2021 8:03 PM by Wendy Marisol Menjivar Pereira

Status: Agenda definition
Location: Join video conference
Video conference: August 28, 2021 9:00 AM - 11:30 AM (in 11 days)
Date: August 28, 2021 9:00 AM - 11:30 AM (in 11 days)
Duration: 02:30

Owners:

Attendees:

Guests:

Agenda:
No items added yet.

+ ADD AGENDA ITEM

IMPORT FOLDERS

IMPORT MEETING

Step 2:

Agenda:

No items added yet.

Agenda item title

Break

CANCEL

NEXT >

+ ADD AGENDA ITEM

IMPORT FOLDERS

IMPORT MEETING

Go to the meeting you want to add the guest responsible for the item:

Step 1: Click the "Add Agenda item"

Step 2: Type the title of the guest's agenda item and click "Next";

¿How to invite an external member to a meeting agenda?

Step 3:

Agenda:

No items added yet.

Select user

maria

CLEAR SEARCH 5/50

(Guest) maria

← BACK NEXT →

Step 4:

Agenda:

No items added yet.

Select user

maria

CLEAR SEARCH 5/50

(Guest) maria

← BACK NEXT →

Step 3: Type the name of the person who will be speaking on that agenda item;

Step 4: Below click on "guest";

¿How to invite an external member to a meeting agenda?

Step 5:

Guest

Maria

maria.gigena@atlasgov.com

Notify guest.

[← BACK](#) [NEXT >](#)

Step 6:

Select duration:

15

[← BACK](#) [FINISH](#)

Step 5: Type the guest's email to receive the invitation;

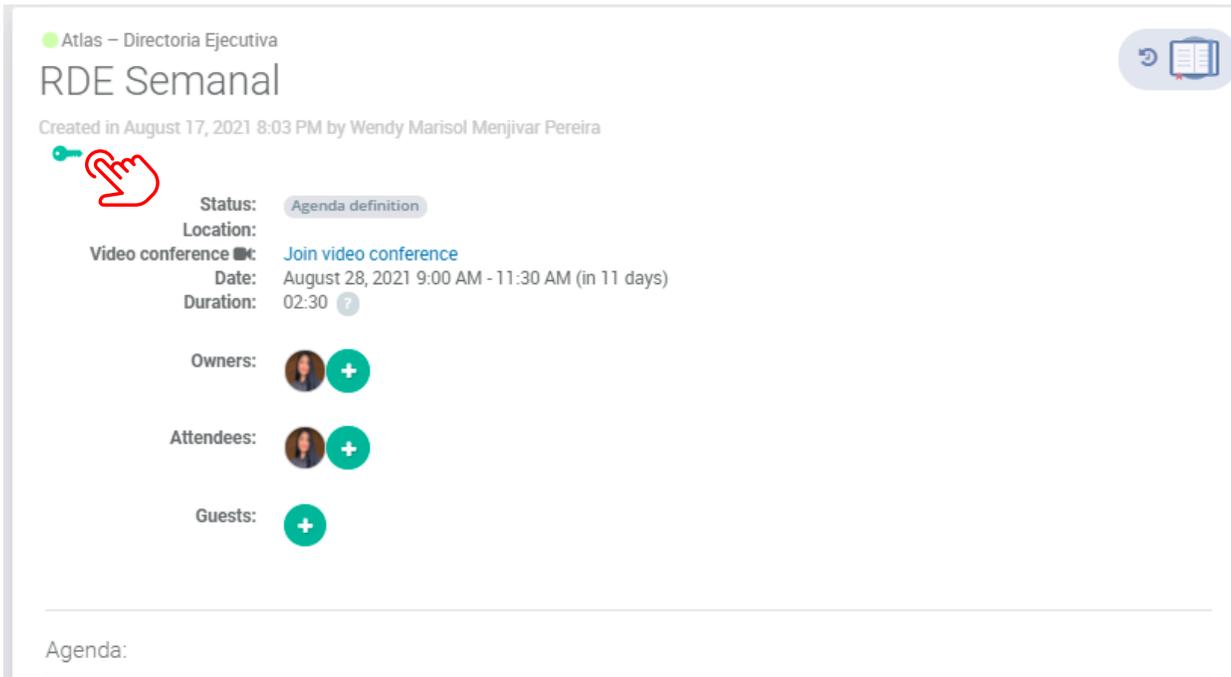
Step 6: Define the time of the agenda item and finish.

The invitation will be on the agenda time and guests do not have access to Atlas.

OBS.: Guests of an agenda item receive the invitation after one hour of being sent, so we unify the invitation if invited to other agenda items.

¿How to remove the permission of a member to view a meeting or agenda items?

Step 1 and 2:



Atlas – Directoria Ejecutiva

RDE Semanal

Created in August 17, 2021 8:03 PM by Wendy Marisol Menjivar Pereira

Status: Agenda definition

Location:

Video conference  [Join video conference](#)

Date: August 28, 2021 9:00 AM - 11:30 AM (in 11 days)

Duration: 02:30 

Owners:  

Attendees:  

Guests: 

Agenda:

Step 1: Go to the meeting where you want to remove the view permission of a board member;

Step 2: Click the green key icon below the meeting title. That key serves to remove someone's viewing permission from that meeting;

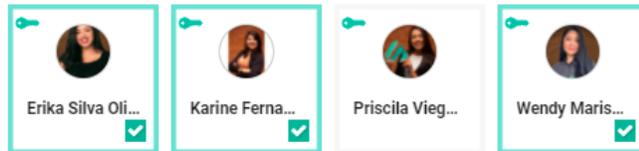
¿How to remove the permission of a member to view a meeting or agenda items?

Step 3:

Who can see this content?

Search members by name, email or company name...

0/100



SELECT ALL

CANCEL SAVE

Step 3: Remove the selection to whom you wish not to see the content.

1. People without permission will not be able to access the meeting.
2. In cases of agenda items restriction, do the same in the green key within the item. Only meeting owners may or may not allow access to board content.

Understand the status of a meeting:

Agenda definition

In this status the meeting owner can create, edit and delete the agenda items and upload material. During this status attendees will only receive the invite and will not be notified of any action, except update of the invite data or creation of voting or actions at the meeting.

Ready

This status starts when the owner clicks on "Call Attendees" (right side), and then everyone will receive the meeting call by email. During this status it is possible that the Bluebook (meeting book) is accessed without the user having internet connection. It is possible to add and/or delete agenda material (but cannot open new agenda or edit them) and publish the minutes and make them available for viewing by attendees. As well as request electronic or digital signature of the minutes.

Published Minutes

This status starts when the owner clicks "Finish" (right side) and prevents any editing of the meeting, unless the owner reopens the event.

By clicking FINISH, the minutes of the meeting will go to Bluebook.

How to access the Bluebook?

Step 1:

The screenshot shows the ATLAS GOVERNANCE interface. On the left is a navigation menu with options: Home, Boards, Meetings (highlighted), Projects, Inbox, Notes, and Knowledge Base. The main content area displays a meeting titled 'RDE Semanal' under the category 'Atlas - Directoria Ejecutiva'. The meeting was created on June 22, 2021, at 4:14 PM by Wendy Marisol Menjivar Pereira. The meeting details include: Status: Agenda definition; Location: Not set; Video conference: Not set; Date: June 26, 2021 9:00 AM - 11:30 AM (a month ago); Duration: 02:30. There are sections for Owners, Attendees, and Guests, each with profile pictures and a plus sign to add more. A red hand icon points to a Bluebook icon (a document with a blue cover) located in the top right corner of the meeting details area.

Step 1: Go to the meeting that you want to access the agenda material;

Step 2: Click the Bluebook icon; The Bluebook is the consolidation of all attachments within the agenda items of the meeting, in a single PDF with the watermark of the person who is downloading, on all pages. Access to the Bluebook can be done through the Home, the Meetings menu or within the meeting.

How to use the Bluebook?

The screenshot displays the Bluebook mobile meeting interface. At the top, there is a navigation bar with a 'BACK' button, a search icon (1), a zoom control set to 'Zoom automático', and a 'SAVE PDF' button (3). Below the navigation bar is a sidebar with an 'Indice' section containing two items: 'Agenda: Proyectos de la semana' and 'Agenda: Puntos importantes de la semana'. The main content area features the ATLAS logo, the meeting title 'RDE Semanal', and the location 'Atlas - Directoria Ejecutiva'. The meeting details include the date 'Saturday JUN 26 2021', the time '9:00 AM ~ 9:30 AM', and the participants: 'Owners: Wendy Marisol Menjivar Pereira;' and 'Attendees: Erika Silva Oliveira; Wendy Marisol Menjivar Pereira;'. Below this is an 'Agenda' section with a green header. The first agenda item is '9:00 AM ~ 9:15 AM 15 minutes' by 'Wendy Marisol Menjivar Pereira' with the title 'Proyectos de la semana'. A right-hand sidebar contains a vertical toolbar with icons for zooming (2), writing, erasing, commenting, and zooming in/out.

Step 1: Access the Bluebook index;

Step 2: Use the writing and marking features in the document;

Step 3: Save the document on your machine, in watermarked PDF.

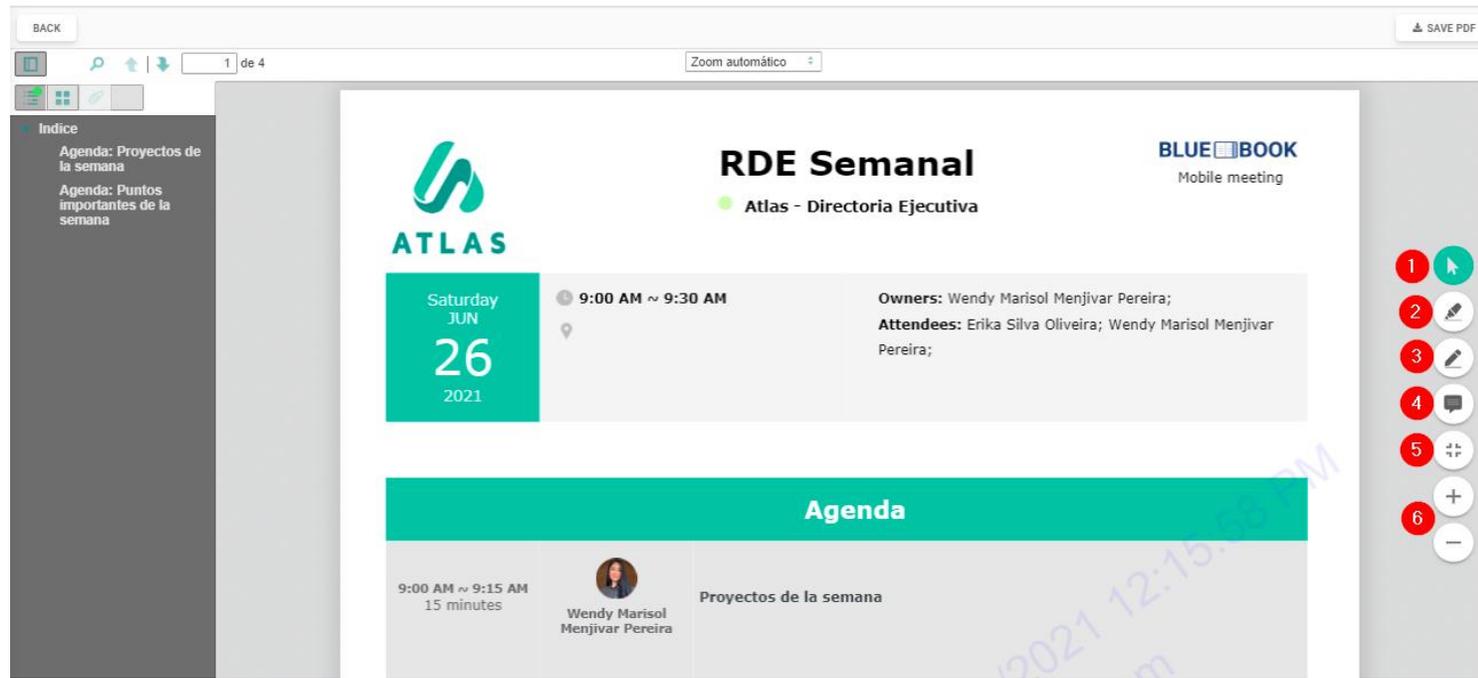
Step 4: Share your annotations with any member of the Board (they will have access to a copy of your annotations); All annotations made within the Bluebook are private and saved automatically.

How to use the Bluebook?

Scratch and Highlight

Scratch & Highlight is a tool that makes it possible to interact in the meeting's Bluebook, inserting notes in the pages that you need. Remember that these annotations are private by default. To use this feature is quite simple, do the following:

- Step 1:** Access the meeting bluebook you where want to annotate;
- Step 2:** Once it appears on the screen, you will have 4 icons in the right corner of your screen. Are these, in the order:
 - 1. Green arrow** - use the arrow to select the annotations you make and delete, if you need to;
 - 2. Highlighter** - use this option when you want to highlight parts of the text;
 - 3. Pen** - this option is for writing on pages, we recommend using pens for tablet/iPad;
 - 4. Notepad** - this option gives you the possibility to make annotations about parts of the text, you can create several annotations along the pages;
 - 5. Fullscreen;**
 - 6.** Below also has icons to increase and decrease the screen.



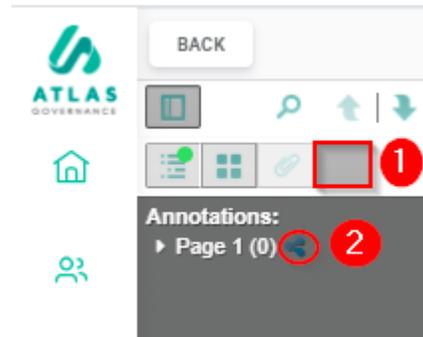
How to use the Bluebook?



1- Go directly to the attachment you want to read;

2- View the pages in thumbnail format;

✔ Share your annotations on your Bluebook with other members.



Step 1: In the Bluebook you want to share, click the last icon in the index;

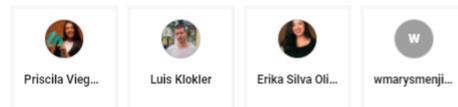
Step 2: Click in the Share icon: 

Step 3: Select the members you want to share the annotation; Once an annotation is shared, the user you shared has a copy of your annotations.

Share notes

Choose one or more users to share the notes

Search members by name, email or company name...



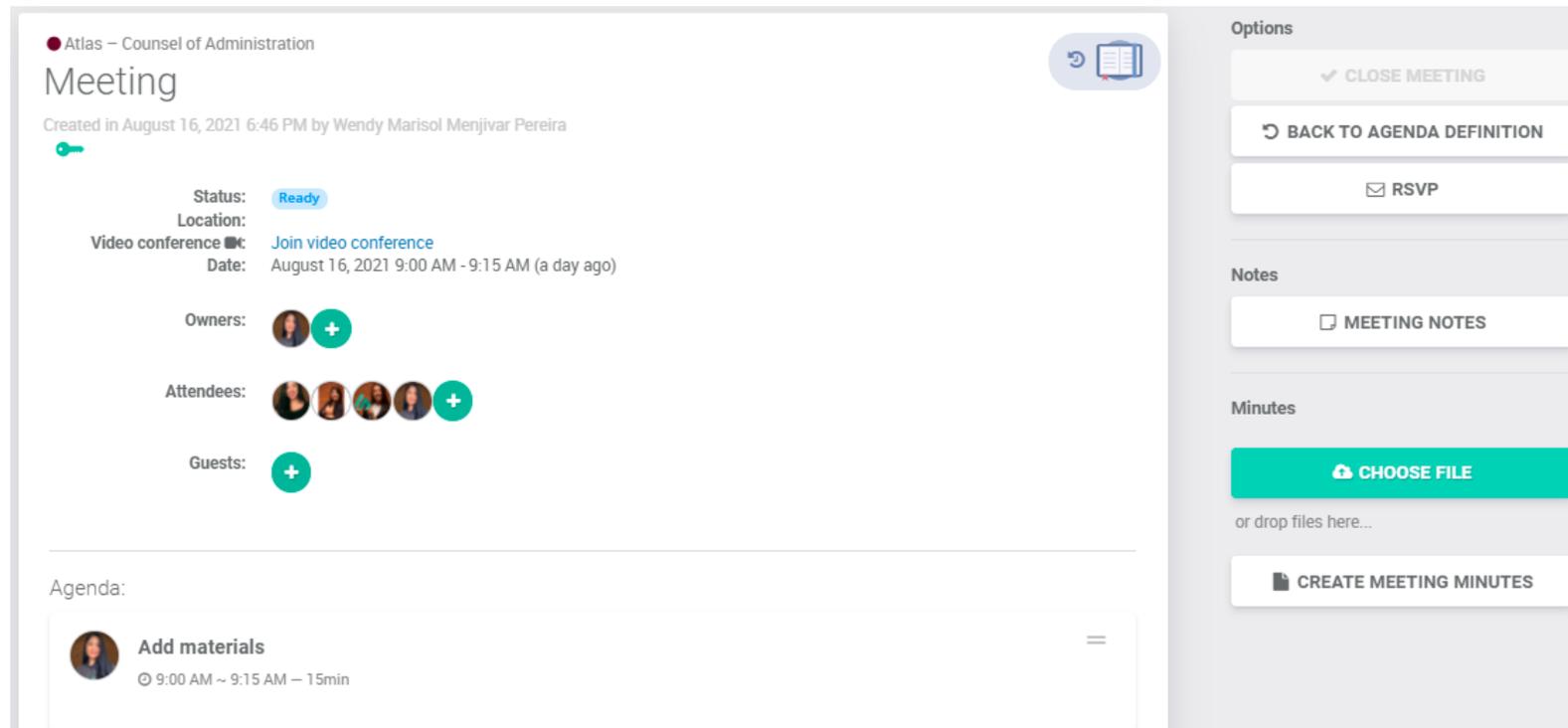
SELECT ALL



Minutes

How to prepare the minutes of the meetings within Atlas?

Step 1:



The screenshot displays the 'Atlas - Counsel of Administration' meeting page. The meeting title is 'Meeting', created on August 16, 2021, at 6:46 PM by Wendy Marisol Menjivar Pereira. The status is 'Ready'. The location is 'Join video conference'. The date is 'August 16, 2021 9:00 AM - 9:15 AM (a day ago)'. There is one owner and five attendees. The agenda section shows 'Add materials' for the 9:00 AM - 9:15 AM slot. On the right sidebar, the 'Options' section includes 'CLOSE MEETING', 'BACK TO AGENDA DEFINITION', and 'RSVP'. The 'Notes' section has a 'MEETING NOTES' button. The 'Minutes' section features a 'CHOOSE FILE' button and a 'CREATE MEETING MINUTES' button.

See how to do it:



1. If a member is restricted from seeing an item on the agenda, he or she shall not have access to the minutes.
2. Only the meeting owners may edit and publish the minutes.
3. Publication of the minutes shall result in notification by e-mail to the meeting attendees..
4. We can only create minutes or publish with the status "Ready".

Step 1: Go to the meeting where you want to generate the minutes;

How to prepare the minutes of the meetings within Atlas?

Step 2:

Options

✓ CLOSE MEETING

↶ BACK TO AGENDA DEFINITION

✉ RSVP

Notes

📄 MEETING NOTES

Minutes

📁 CHOOSE FILE

or drop files here...

📄 CREATE MEETING MINUTES

Step 3:

< BACK

📄 Meeting Minutes

You haven't created a minutes for this meeting yet.

IMPORT FROM MEETING DATA or WRITE FROM SCRATCH

Actions

✓ PUBLISH MINUTES

📄 SAVE DRAFT

✍ INSERT SIGNATURE SHEET ON THE TEXT

🖨 PRINT MINUTES

Meeting Details

● Counsel of Administration
Meeting #: 441501
Date: August 16 2021, 09:00
Location: Not set

Step 2: Click "Create Meeting Minutes" (this button is only available when the meeting is with Status "Ready");

Step 3: Click "Import from Meeting Data" to use the template suggested by the system. If you don't want to use the suggested template, click "Write from scratch";

How to prepare the minutes of the meetings within Atlas?

Step 4:

The screenshot shows the 'Meeting Minutes' editor in Atlas. The main text area contains the following content:

Atlas Governance
MEETING MINUTE COUNSEL OF ADMINISTRATION
MEETING CALLED TO ORDER IN AUGUST 16th, OF 2021

1. **Date, Time and Local:** at 8 16th of 2021, at 9 h 0 min hosted at
2. **Attendees:** Erika Silva Oliveira; Karine Fernandes Pereira; Priscila Viegas I CS; Wendy Marisol Menjivar Pereira;
3. **Agenda:**
 Add materials
4. **Actions:**

On the right side, there is an 'Actions' panel with the following options:

- PUBLISH MINUTES
- SAVE DRAFT
- INSERT SIGNATURE SHEET ON THE TEXT
- PRINT MINUTES

Below the actions panel, 'Meeting Details' are shown:

- Counsel of Administration
- Meeting #: 441501
- Date: August 16 2021, 09:00
- Location: Not set

Step 5:

Select attendees to include in the Signature Sheet

Search members by name, email or company name...

0/100

The screenshot shows a selection interface for members. There are four member cards displayed, each with a profile picture and a name: Erika Silva Oli..., Karine Ferna..., Priscila Vieg..., and Wendy Maris... The first and last cards have a green checkmark in the bottom right corner, indicating they are selected.

SELECT ALL

CANCEL INSERT

Step 4: Make the necessary edition;

Step 5: Click on "Signature Sheet" if you want to include the names of the attendees who will sign at the end of the minute;

How to prepare the minutes of the meetings within Atlas?

Step 6:

< BACK

Meeting Minutes

B *I* U ~~S~~ x_2 x^2 **A** **T**

Atlas Governance

MEETING MINUTE COUNSEL OF ADMINISTRATION

MEETING CALLED TO ORDER IN AUGUST 16th, OF 2021

1. **Date, Time and Local:** at 8 16th of 2021, at 9 h 0 min hosted at
2. **Attendees:** Erika Silva Oliveira; Karine Fernandes Pereira; Priscila Viegas | CS; Wendy Marisol Menjivar Pereira;
3. **Agenda:**
 - o Add materials
4. **Actions:**

Actions

✓ PUBLISH MINUTES

SAVE DRAFT

INSERT SIGNATURE SHEET ON THE TEXT

PRINT MINUTES

Meeting Details

● Counsel of Administration

Meeting #: 441501

Date: August 16 2021, 09:00

Location: Not set

Step 6: Click on "Publish Minutes"

¿How to upload a meeting minute within Atlas?

See how to do it:



Step 1:

Options

CLOSE MEETING

BACK TO AGENDA DEFINITION

RSVP

Notes

MEETING NOTES

Minutes

CHOOSE FILE

or drop files here...

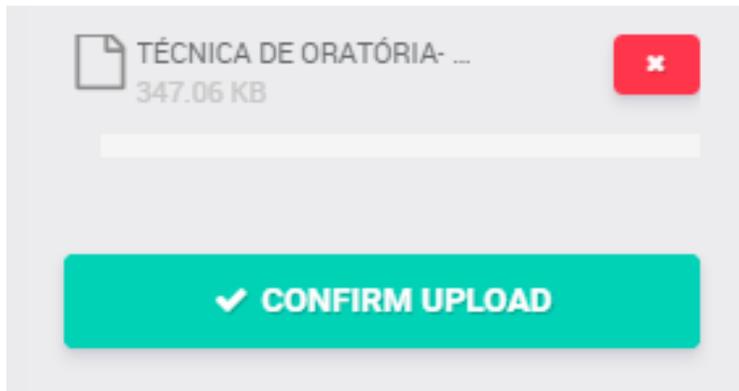
CREATE MEETING MINUTES

1. If a member is restricted from seeing an item on the agenda, he or she shall not have access to the minutes.
2. Only the owners of the meeting may edit and publish the minutes.
3. Publication of the minutes shall result in notification by e-mail to the meeting participants.

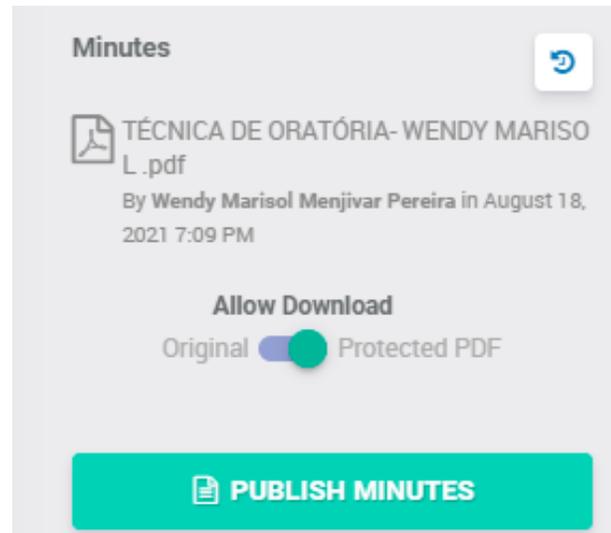
Step 1: Click “Choose File” (this button is only available when the meeting is in Status “Ready”);

¿How to upload a meeting minute within Atlas?

Step 2:



Step 3:



Step 2: Choose the file and click "Confirm upload"

Step 3: Click "Publish Minutes"

How to request a minute's signature?

The screenshot shows a meeting interface with the following elements:

- Meeting Header:** "Atlas - Counsel of Administration", "Meeting", "Created in August 16, 2021 6:46 PM by Wendy Marisol Menjivar Pereira".
- Meeting Details:** Status: Ready, Location: Video conference, Date: August 16, 2021 9:00 AM - 9:15 AM (4 days ago).
- Attendees:** Owners (1), Attendees (4), Guests (1).
- Agenda:** "Add materials" (9:00 AM - 9:15 AM - 15min).
- Options Panel (Right):** Includes "CLOSE MEETING", "BACK TO AGENDA DEFINITION", "RSVP", "MEETING NOTES", "Minutes" section with a PDF titled "TÉCNICA DE ORATÓRIA-WENDY MARISO L .pdf" (uploaded by Wendy Marisol Menjivar Pereira on August 18, 2021 7:09 PM), and "Allow Download" (Original/Protected PDF).
- Signature Request Flow (Right):** A sequence of three steps: 1. "REQUEST SIGNATURE" button (marked with a red '1'). 2. "Request Electronic Signature" screen with an "Electronic Signature" icon (marked with a red '2'). 3. "Request Digital Signature" screen with a "Digital Signature" icon (marked with a red '3').
- Navigation:** "CLOSE", "BACK", "NEXT" buttons at the bottom right of the signature flow.

Step 1: With the published minutes we can request the signatures;

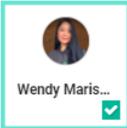
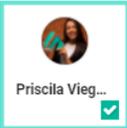
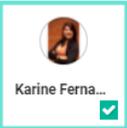
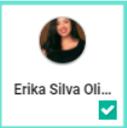
Step 2 and 3: Choose whether it will be electronic or digital, remembering that to sign with digital signature the person must have the E-CPF.

Click next

How to request a minute's signature?

Request Electronic Signature

Search members by name, email or company name... 0/100



UNSELECT ALL

CLOSE BACK **4** NEXT

Request Electronic Signature

Check firm names carefully
Make sure names are complete and spelled correctly.

Full name

	Erika Silva Oliveira	Erika Silva Oliveira	20/50
	Karine Fernandes Pereira	Karine Fernandes Pereira	24/50
	Priscila Viegas CS	Priscila Viegas Santana	23/50
	Wendy Marisol Menjivar Pereira	Wendy Marisol	13/50

I have read, and i agree with the [Terms and Conditions](#)

CLOSE BACK **5** REQUEST

Step 4: Select the members that will sign the minute and click "Next";

Step 5: Check names carefully, mark the Terms and Conditions as read and click "Request";

How to request a minute's signature?

The screenshot displays the 'Insert signature fields' interface. On the left, a sidebar lists four signers: Erika S. Oliveira, Karine F. Pereira, Priscila V. Santana, and Wendy Marisol. Below the list are fields for 'Signature', 'Initials', 'Name', 'E-mail', and 'Cellphone'. The central area shows a document titled 'Atlas Governance' with a meeting minute template. The document text includes: 'MEETING MINUTE COUNSEL OF ADMINISTRATION', 'MEETING CALLED TO ORDER IN AUGUST 16th, OF 2021', and a list of attendees and agenda items. Below the text are four colored signature boxes (green, red, blue, yellow) with corresponding initials. The right-hand panel contains 'BACK' and 'NEXT' buttons. A red circle with the number '6' is positioned over the 'Fields' menu, and another red circle with the number '7' is positioned over the 'NEXT' button. A 'Suporte' button is visible at the bottom right.

Step 6: Edit your minutes by adding signatures, initials and personal data (can only be entered individually);

Step 7: Click "Next" after you have finished the required edits

How to request a minute's signature?

Review and submission

Message (optional) **8**

0/1000

All Signers

- Erika Silva Oliveira
- Karine Fernandes Pereira
- Priscila Viegas Santana
- Wendy Marisol

9
CANCEL CONFIRM

Step 8: If you want to, you can send a message (it's optional);

Step 9: Make a review and submission, then "Confirm".

Inbox

Your pending in a single location

The screenshot displays the Atlas Inbox interface. At the top, there is a search bar and a 'CREATE NEW' button. Below this, a search bar for actions or polls is visible. The main area features a sidebar with navigation options: 'Inbox' (1), 'Mentions' (2), 'Outbox' (3), and 'Others' (4). The main content area has a filter for 'OPEN' and 'CLOSED' items, and a 'Types' section with checkboxes for 'Tasks', 'Polls', 'Access', and 'Signatures'. A '5' in a red circle is placed above the 'Types' section. The list of items includes: 'Atlas - Proyectos Mensuales - Copy' with 'Fazer cotação' (6 months ago) and an 'OPEN' button; 'Atlas - Consejo Fiscal' with 'Verificar los anexos del orden del dia' (5 months ago) and a 'FOR REVIEW' button; and '[Atlas] Customer Success - Treinamento BDR's' with 'aprovação orçamento 2021' (4 months ago) and an 'AWAITING VOTES' button. Navigation arrows for 'PREVIOUS' and 'NEXT' are also present.

1. Inbox: Find everything that involves your participation within the Portal. The Atlas categorizes as pending any poll, task, signatures or accesses (unlocking users in the case of administrators);

2. "@tags": View all comments you were mentioned within agendas, tasks or votes.

3. Outbox: Track all demands you have requested for another member;

4. Other: See what is being demanded for the members of the Board you participate in;

5. Use filters to assertively view all your issues.

Votings

Vote through Atlas

The screenshot shows the Atlas voting interface for a poll titled "Approval of the minute". The poll was created on August 9, 2021, at 8:02 PM by Wendy Marisol Menjivar Pereira (#434228). The status is "Awaiting Votes" and the due date is 9/8/2021. The meeting is "Atlas - RDE Mayo 2021". There are three owners and three pending votes. The interface includes three voting options: "Yes" (0 votes), "No" (0 votes), and "Abstain" (0 votes). Below the voting options are tabs for "Comments", "Attachments", and "Poll report". A comment editor is visible at the bottom with a text area and a rich text toolbar. Red circles with numbers 1, 2, 3, and 4 highlight specific elements: 1 points to the "Vote pending" indicator, 2 points to the "Comments" tab, 3 points to the "Attachments" tab, and 4 points to the "Poll report" tab.

Whenever you are asked to register your vote in a voting, you will receive an email notification with the link that will direct you to the screen. Go to the link and:

Step 1: Choose your vote;

Step 2: Make a comment if you want to (Don't forget to click "Send" to register your comment);

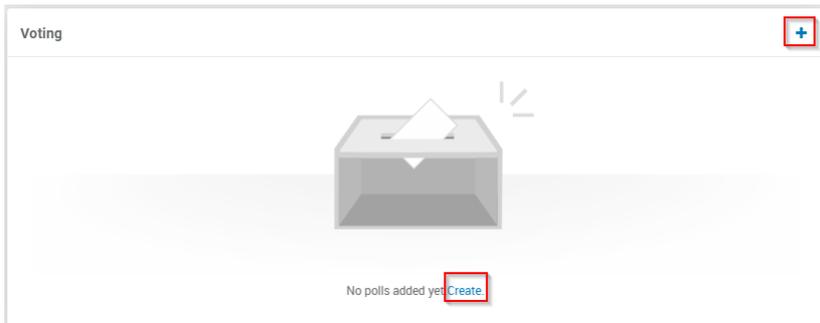
Step 3: Click DOWNLOAD to download the material or attachment related to this decision;

Step 4: Check the poll report (in it you find the list of all votes and see if any user has undone the vote at any time). Within comments you can mark members to be notified by email. To do this put "@" and select who you want to mention.

OBS.: After a vote is registered it will not be possible to edit the information, delete attachment or comments and edit the voting members.

¿How to create a voting?

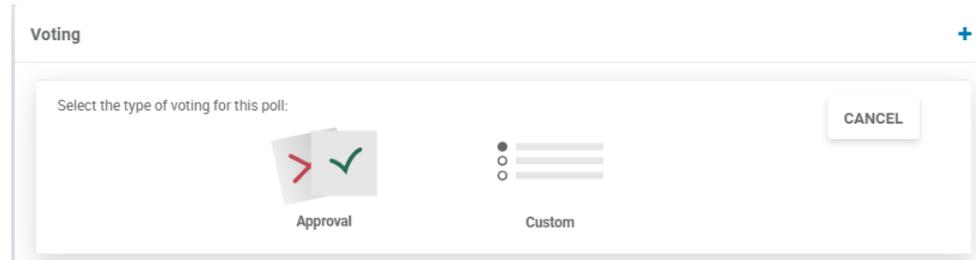
Step 1:



Go to the meeting where you want to create a voting;

Step 1: Click "+" in Voting

Step 2:



Step 2: Choose the type of voting (approval or custom);

OBS: When choosing "approval" voting, the voting is created with the voting options (yes, no, abstain); When choosing "custom" voting the owner includes which will be the voting options;

See how to do it:



¿How to create a voting?

Step 3:

Voting



Voters (4 selected):

3



Open vote:

4



Notify voters:

5



CANCEL

OK

Step 3: Select which voting members will be;

Step 4: Choose whether votes will be open or secret;

Step 5: Choose whether to notify voters or not and click "ok" to finish.

¿How to create a voting?

Step 6:

Voting



Approve the meeting minutes

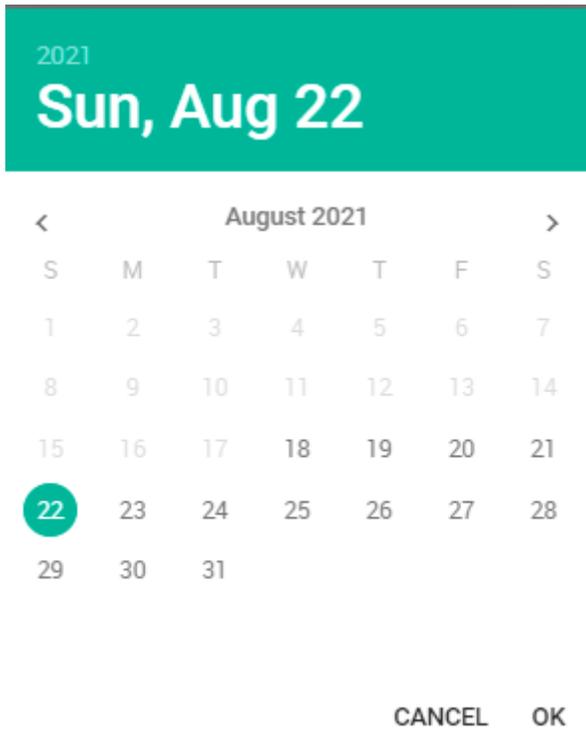
CANCEL

SUBMIT

Step 6: When you define the voting title, click "Submit";

¿How to create a voting?

Step 7:



Step 7: Set the deadline for voting and finish.

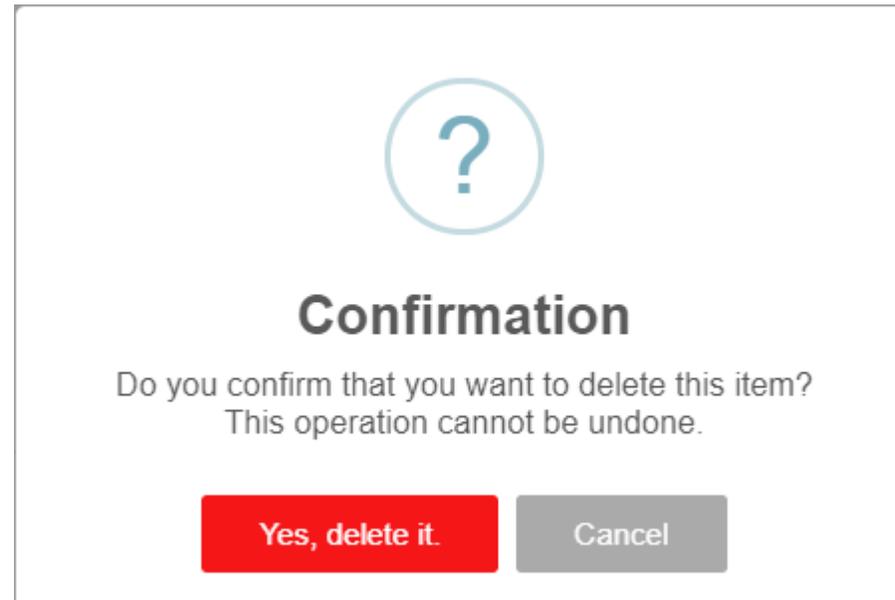
The opening of the voting generates an e-mail notification to the voters and will remain in the list of issues on the inbox screen of the users.

You can accompany it through the "outbox" in the menu of the Inbox.

¿How to cancel a voting?

After a vote is registered you will not be able to alter anything else within it, for example: deadline, add a new voter.

When a vote can be cancelled: Only the owner of that vote can cancel it, as a voting will never be excluded from the portal and if cancelled it is necessary to explain why the cancellation (That explanation is visible to all attendees)



See how to
do it:



OBS.: When the voting is cancelled all voting members are notified by e-mail.

¿How to cancel a voting?

Step 1:

Atlas - Council of Administration

Approve the meeting minutes

Created in August 18, 2021 7:33 PM by Wendy Martal Member Parale (9444116)

Status: **Awaiting Votes** Due date: 22/8/2021

Meeting: Atlas - Meeting

Owners: Pending votes:

Vote pending:

Yes 0 votes.	No 0 votes.	Abstain 0 votes.
-----------------	----------------	---------------------

Comments Attachments Poll report

Normal **B** *I* U

Enter new comment...

Click on the poll you want to cancel;;

Step 1: Click "Cancel poll"

¿How to cancel a voting?

Step 2:

Poll Cancellation

Please state the reason for the cancellation of this poll

Confirm

Back

Voting



Atlas – Counsel of Administration

Approve the meeting minutes

Poll Cancelled

August 22, 2021 – in 4 days

VOTERS

4

VOTES

0

Step 2: Justify the reason for the cancellation and click "Confirm".

Only voting owners can cancel the vote. All voting members will receive by e-mail the cancellation and the reason.

Actions

Create a task to a member of the board

The screenshot displays the Atlas Governance web application interface. On the left is a navigation sidebar with icons for Home, Boards, Meetings, Projects, Inbox (highlighted), Notes, Knowledge Base, and Help. The main content area features a search bar at the top with a 'CREATE NEW' button and a search prompt: 'Search actions or polls by title, username or board name ...'. Below the search bar are tabs for 'OPEN' and 'CLOSED', and a 'Types' filter section with checked boxes for 'Tasks', 'Polls', 'Access', and 'Signatures'. The main list shows three actions, each with a 'PREVIOUS' and 'NEXT' navigation arrow. Each action entry includes a user profile picture, the text 'Atlas', 'Unlock user [Name]', and an 'UNLOCK' button. The actions listed are for Bruna Soares de Jesus, Gustavo Souza, and Joao Justino.

You can open an action within Atlas for another member.

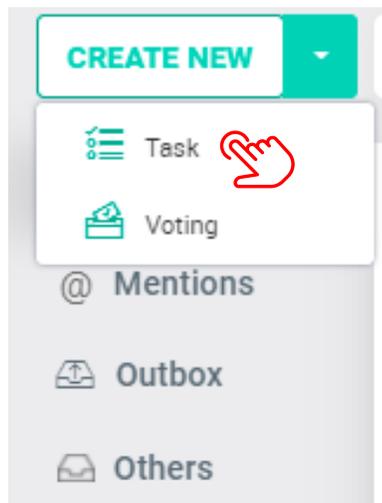
The actions are demands that you send by the portal, determines a term for it to be concluded and can accompany the progress of it by the "Outbox".

You can find a shortcut for creating an action in the Atlas Home, within meetings, projects or within the "Inbox" menu.

Actions

Create a task to a member of the board

Step 1:



Step 2:

A screenshot of a task creation form. It features a text input field containing the text 'Daniel Felipe Oliveira de Almeida Add materials to the MCA meeting'. The text 'Add materials to the' is underlined in red. To the right of the input field is a green button labeled 'GO'. Below the input field, the character count '76/1000' is visible.

To create a task follow these steps:

Step 1: Click "Create New Task"

Step 2: Define the responsible for that action and describe the action;

Actions

Create a task to a member of the board

Step 3:

Pick a due date for this action:

August 2021								
<	S	M	T	W	T	F	S	>
	1	2	3	4	5	6	7	
	8	9	10	11	12	13	14	
	15	16	17	18	19	20	21	
	22	23	24	25	26	27	28	
	29	30	31					

CANCEL OK

Step 4:

Search boards by name...

0/50

- Atlas Customer Success
- Atlas Comitê de Cultura
- Atlas Customer Success - ...
- Atlas Conselho de Admini...
- Atlas Conselho de Admini...
- [Atlas] Customer S... Customer Success

Step 3: Set a deadline for the completion of this action;

Step 4: Choose the board to which the action will be linked. Atlas will send an e-mail to the person responsible for that action.

Actions

Execute an action

The screenshot shows the Atlas Actions interface for the action 'Aprobar el Acta de Junio de 2021'. The interface includes the following elements:

- Header:** 'Directoria Ejecutiva' and 'Aprobar el Acta de Junio de 2021' with a pencil icon. Below it, it says 'Created in August 3, 2021 4:28 PM by Wendy Marisol Menjivar Pereira (#428292)'.
- Assigned to:** Wendy Marisol Menjivar Pereira.
- Subscribers:** Two users, one with a plus sign.
- Reviewer:** One user with a plus sign.
- Description:** A large empty text area.
- Meeting:** 'Atlas - RDE Semanal'.
- Due date:** '4/8/2021' with a calendar icon.
- Status:** 'Pending' with a red circle containing the number '1'.
- Navigation:** 'Comments' (with a red circle containing '2') and 'Attachments' (with a red circle containing '3').
- Rich Text Editor:** A toolbar with options like Bold, Italic, Underline, and a dropdown menu showing a list of users: 'All', 'Priscila Viegas | CS Priscila@atlasgov.com', 'Luis Klokier luis.klokier@atlasgov.com', 'Wendy Marisol Menjivar Pereira wendy.marisol@atlasgov.com', and 'Erika Silva Oliveira erika.oliveira@atlasgov.com'. A 'SEND' button is next to the dropdown.
- Action Buttons:** 'SUBMIT FOR REVIEW' (with a red circle containing '4') and 'MARK AS FINISHED' (with a red circle containing '5').
- Footer:** 'CLOSE'.

If you receive an action via Atlas, access the notification email link or even within the System, through the Actions menu, in the Inbox folder.

On the action screen you can:

- 1: View action status;
- 2: Make comments and mark people with "@";
- 3: Attach documents;
- 4: Send action for review;
- 5: Finish action

Actions

Approve or reject an action received

Consejo Fiscal

Verificar los anexos del orden del dia

Created in March 3, 2021 3:16 PM by Luis Klokler (#272573)

Assigned to: Wendy Marisol Menjivar Pereira

Subscribers: [User 1] [User 2] [Add]

Reviewer: [User 1]

Comments **1** Attachments **2**

Normal [B] [I] [U] [S] ["] [List] [List] [List] [List] [Link] [Text] [Undo] [Redo]

Enter new comment...

[Attachment Icon]

SEND

3

REJECT APPROVE

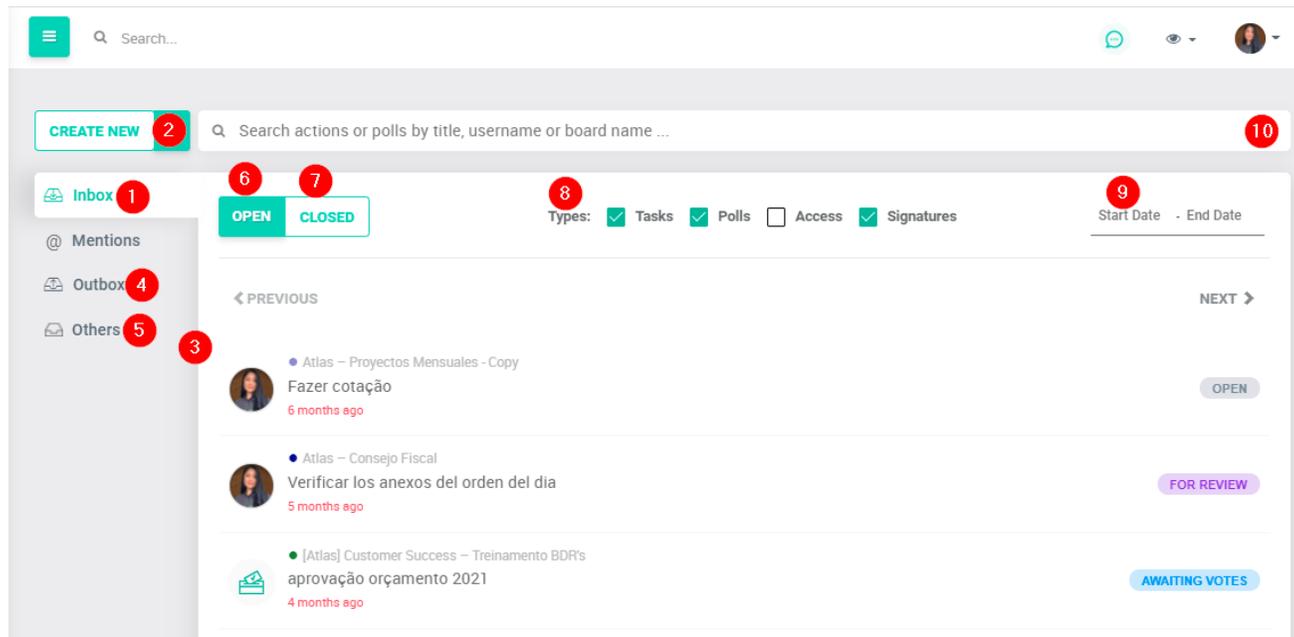
CLOSE

If you receive an action to review via Atlas, access by the email notification link or within the System, by the Actions menu, in the Inbox paste. On the action screen you can:

- 1: Comment and mention people with the "@";
- 2: Attach documents;
- 3: Approve or reprove the action.

Tasks and polls

Find your pending within Atlas



Access the list of actions and open votes in Atlas

1: Click on Inbox;

2: Create a new task or new voting;

3: Access the list of your tasks and polls in which you are a voting member;

4: Access the list of tasks that you opened to other members and polls in which you are not a voting member;

5: Access the actions and votes of your board, opened by other members;

6: Access the list of actions and open votes;

7: Access the list of actions and closed votes;

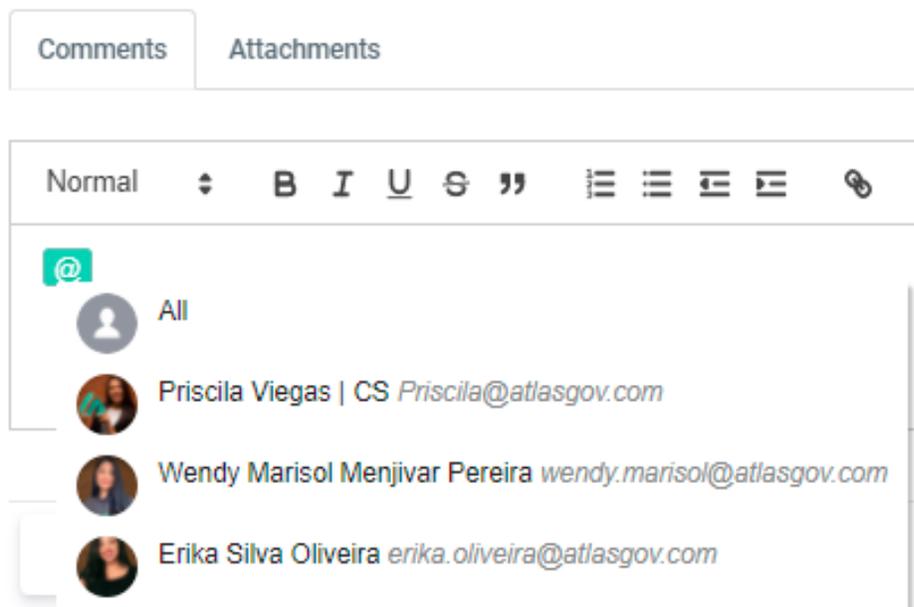
8: Filter access only for tasks and polls;

9: Filter by period;

10: Search actions and votes by title, user or board.

Comments

Comment within Atlas and mention people



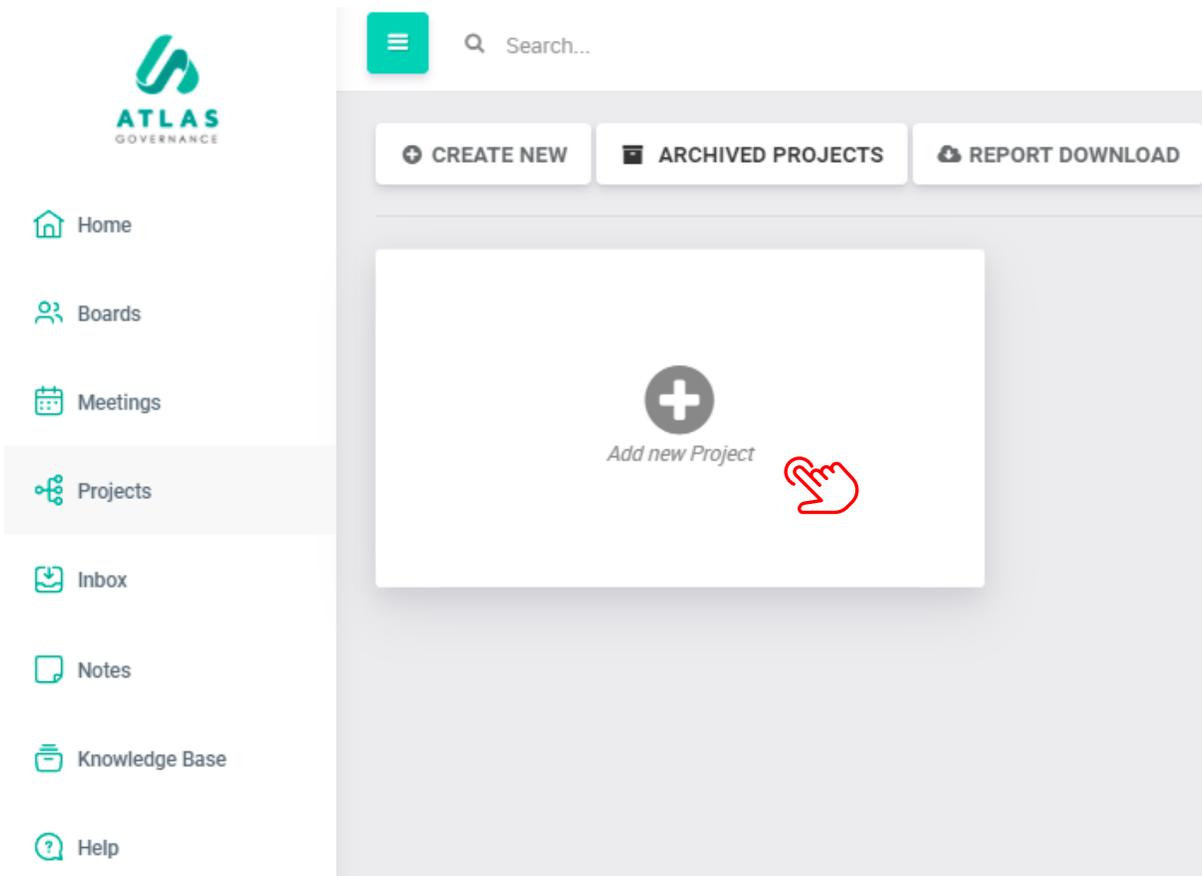
Members mentioned with @ will receive an email notification

You can make comments within Atlas and still mention members using "@". You can mention all the members of that meeting; use the "@all" option. The comment field is available on the screens of:

- Agenda items;
- Actions;
- Voting.

Projects

Open a project to organize common actions



The project is a way of accompanying a set of actions with the same final objective. By creating it you will define the list of actions to their respective responsables and as each one is performing their activity, the bar will be filled until the moment to be complete. To create follow these steps:

Step 1: Click "Add New Project";

Projects

Open a project to organize common actions

Create a new Project

● User manual

11/1000

Selected client:

Atlas

NEXT >

Step 2: Give a name to your project and then click on "next";

Projects

Open a project to organize common actions

Choose the members for this project:

Search members by name, email or company name...

0/100

 Erika Silva Oli... <input checked="" type="checkbox"/>	 Erika Silva Oli...	 Estefana Lug...	 Estela Mirian ...	 Evelyn Cristin...	 FABIANA KEL...	 fabiana.rissio...
 Fabiola Ceron...	 Felipe Albert...	 Felipe Ferreir...	 Felipe Madru...	 Felipe Maico...	 Fernanda Ra...	 Fernando Vill...

SELECT ALL

← BACK NEXT → 

Step 3: Select the members who will be involved in your project demands and then click "Next".

Projects

Open a project to organize common actions

Confirmation

Name ● User manual

Users

- Wendy Marisol Menjivar Pereira
- Erika Silva Oliveira

Do you want to proceed?

← BACK CREATE 

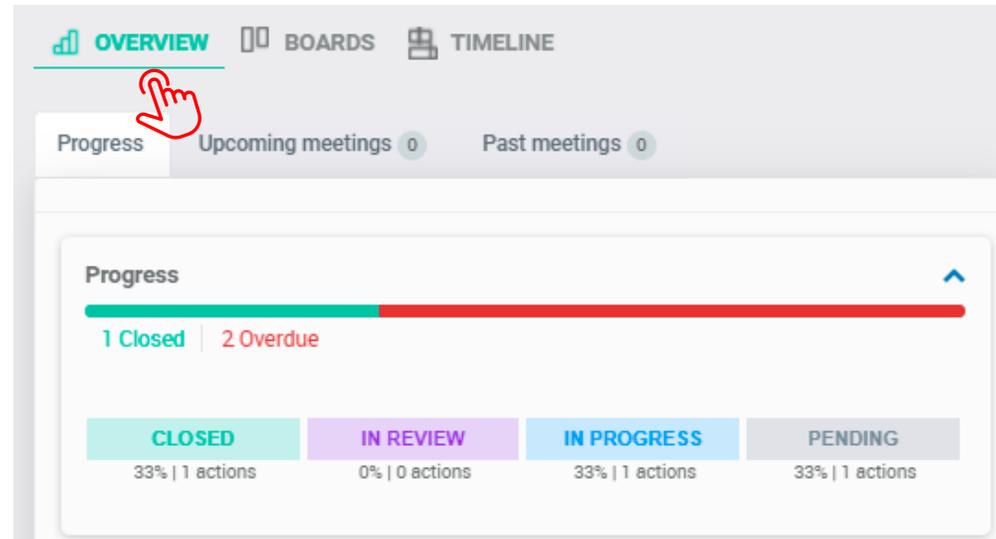
Step 4: Validate the users you included in the Project and finally click "Create".

Projects

Open a project to organize common actions

There are 3 types of visualizations in a project:

1. Overview



- Overview:** In the overview format, you will view all the columns and demands in each of them and you will also be able to view the project progress. Visualize in detail the walk of all the demands related to each column in your project.

Pending - These are the actions that have not been initiated.

In progress - These are the actions in progress.

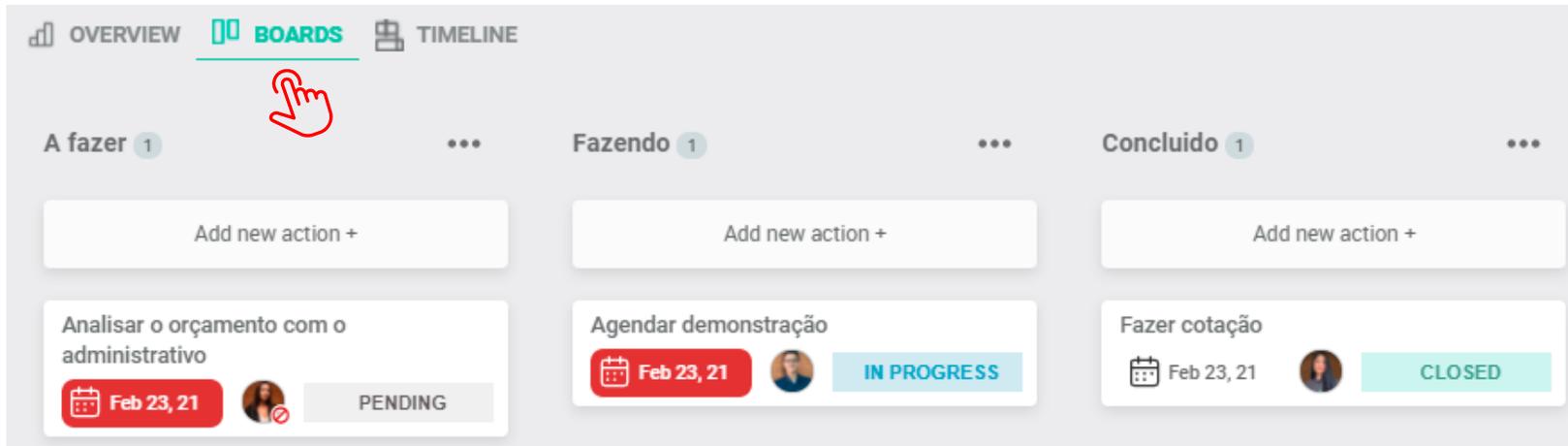
In review - Are the actions in review process;

Closed- Are the actions concluded;

Projects

Open a project to organize common actions

2. Boards

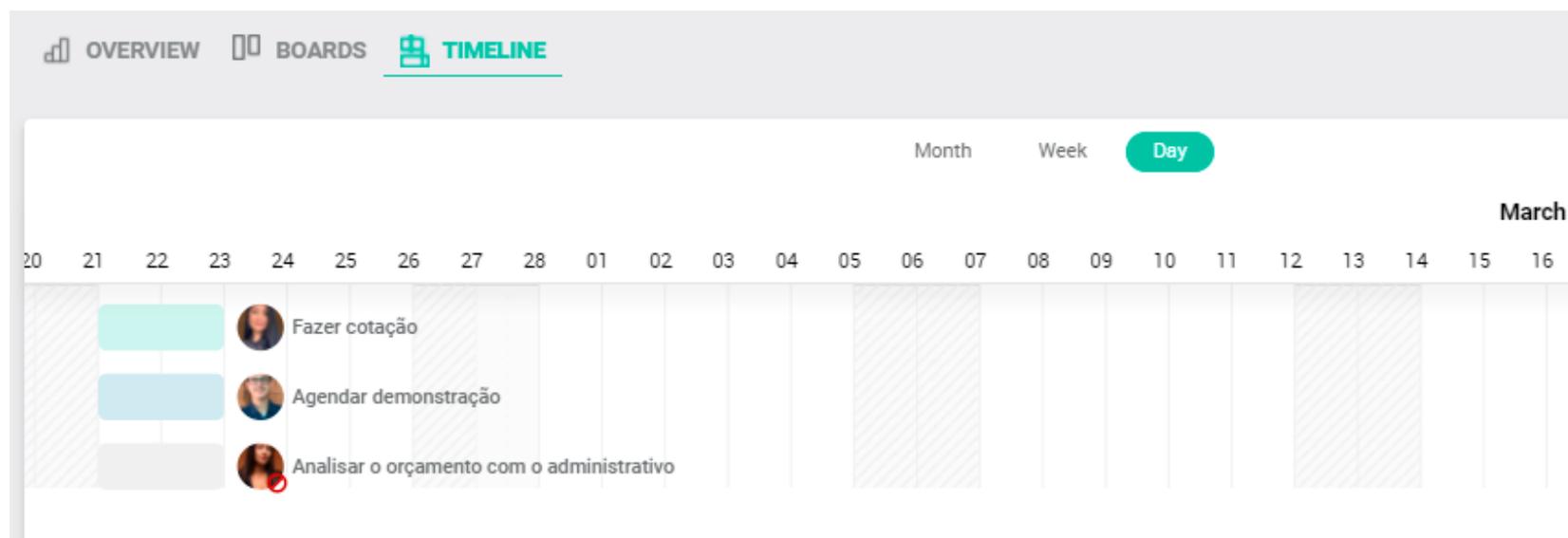


2. Boards: In the “Boards” format you can visualize demands and tasks in detail divided by columns. All the actions are totally bulldozed, that is, you can drag the actions for any column created. There is no limit to the creation of columns or actions.

Projects

Open a project to organize common actions

3. Timeline



3. Timeline: In the “Timeline” format you will be able to manage and control your actions so that you can accurately list all open and estimated time demands to execute them. It contains the activities that need to be performed, shows the start and end time of each activity. And in that way it will be possible to see how long the project will be delivered and also the activities that must be done first.

Projects

How to extract a project report

The screenshot displays the Atlas Governance web application interface. On the left is a navigation sidebar with icons for Home, Boards, Meetings, Projects (highlighted with a red circle '1'), Inbox, Notes, Knowledge Base, and Help. The main content area is titled 'Select projects' and includes a search bar labeled 'Search projects by name...'. Below the search bar, there are two project cards: one with a red dot and a checked checkbox, and another with a blue dot and an unchecked checkbox. At the bottom of the main area, there are 'UNSELECT ALL', 'CANCEL', and 'CONFIRM' buttons. The 'CONFIRM' button is highlighted with a red circle '3'. The top navigation bar contains 'CREATE NEW', 'ARCHIVED PROJECTS' (highlighted with a red circle '2'), and 'REPORT DOWNLOAD' buttons.

* The project report has the function of centralizing the progress of the project actions through Excel. In it you will find the following data, such as: project name, action ID, status, due date, responsible, among other information necessary to have control of the project.

To do this extraction just follow the step by step below:

- 1- Click on "Projects";
- 2- The "Report Download" option will be on the main screen for the project owner;
- 3- When selecting the option, choose which project you want to extract the report and click "Confirm".

Announcements

Send formal announcements to the board members

Atlas-Directoria Ejecutiva 

"RDE Semanal" meeting call **1**

by Wendy Marisol Menjivar Pereira Created in August 12, 2021 5:46 PM

Addressees: **2**



Call - RDE Semanal **3**

Date, time and local: June 26, 2021 beginning at 9:00 AM until 9:30 AM to be held at the following address:

Video conference : [Join video conference](#)

Agenda:

Proyectos de la semana	9:00 AM - 9:15 AM
Puntos importantes de la semana	9:15 AM - 9:30 AM

4 Attachments **5** Announcement report

No attachments found.

Announcements are news sent to board members.

- 1.Title;
- 2.Members notified by e-mail;
- 3.Description;
- 4.Attachments;
- 5.Announcement report

¿How to create an announcement?

See how to do it:



Step 1:

Step 2:

Announcements are notices sent to board members. You can create one on the home page.

Step 1: Click the "+" icon;

Step 2: Choose a board and click "Next"

¿How to create an announcement?

Step 3:

Create announcement

Announcement title

Slides not includes in the meeting

34/500

B *I* U A T |

I am going to attach the slides not included in the meeting agenda items

Do you want to add any attachment?

CHOOSE FILES

or drop files here...

[< PREVIOUS](#) [NEXT >](#)

Step 4:

Create announcement

Who should receive the announcement?

[< PREVIOUS](#) [NEXT >](#)

Step 3: Give a title to the announcement and write the content;

Step 4: Attach documents (if you want to);

Step 5: Define which members will receive notification of the announcement;

¿How to create an announcement?

Step 5:

Create announcement

Board: ● Atlas –Counsel of Administration

Title: Slides not includes in the meeting

Description: I am going to attach the slides not included in the meeting agenda items

Addressees:

- Karine Fernandes Pereira
- Priscila Viegas | CS
- Wendy Marisol Menjivar Pereira
- Erika Silva Oliveira

Attachments: No attachments found.

Do you want to continue?

[← PREVIOUS](#)  [CREATE →](#)

OBS.: Only board owners can create an announcement.

Step 5: Confirm the information and click on "Create"

Notes

Make private annotations within Atlas

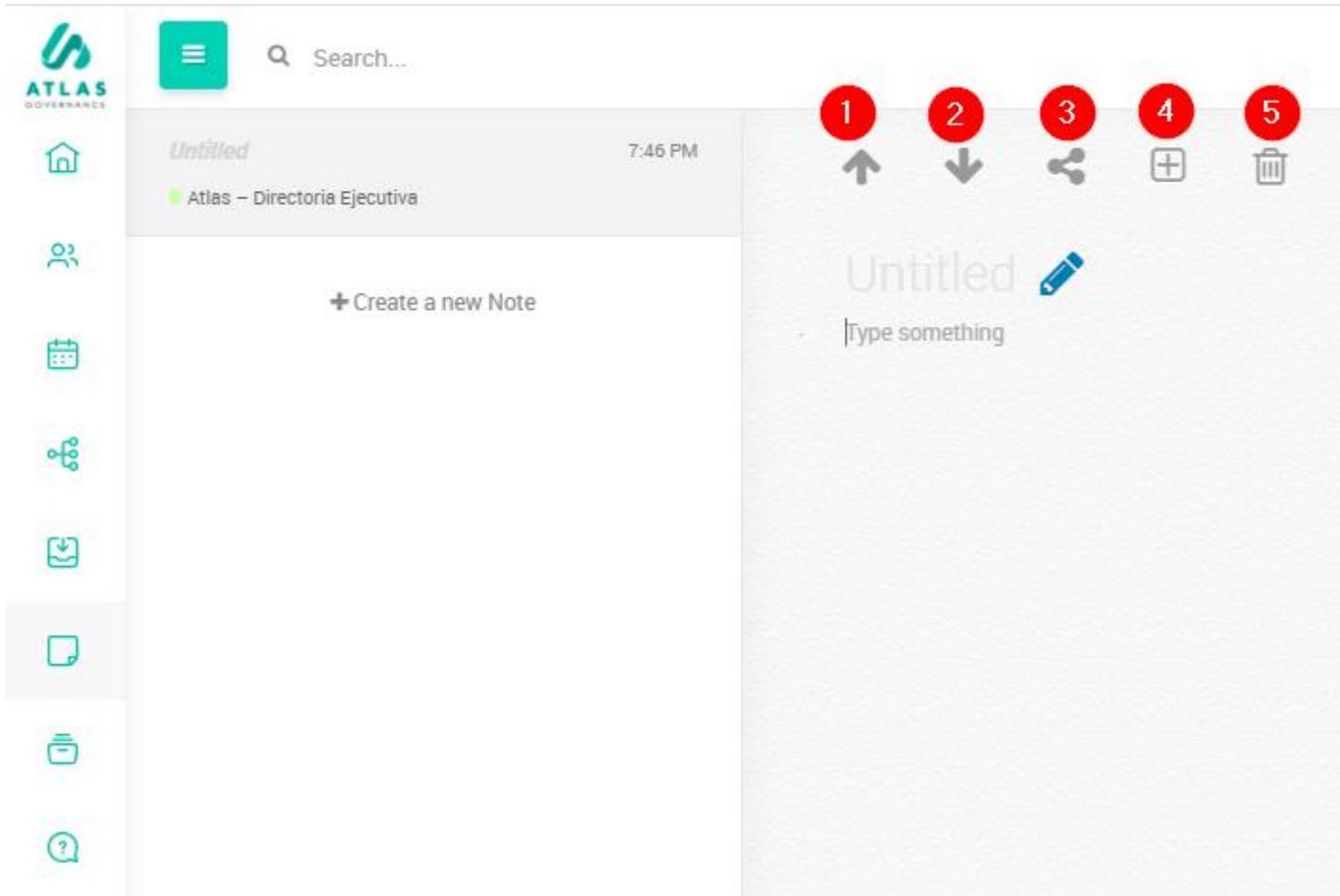
The screenshot displays the Atlas Governance user interface. On the left is a vertical sidebar with navigation options: Home, Boards, Meetings, Projects, Inbox, Notes (highlighted with a red circle and the number '1'), Knowledge Base, and Help. The main content area shows a meeting titled 'RDE Semanal' under the 'Atlas - Directoria Ejecutiva' organization. The meeting details include: Status: Agenda definition; Location: Not set; Video conference: Not set; Date: June 26, 2021 9:00 AM - 11:30 AM (2 months ago); Duration: 02:30. Below these details are sections for Owners, Attendees, and Guests, each with profile icons and a plus sign to add more. On the right side of the meeting view, there is an 'Options' panel with buttons for 'CALL ATTENDEES', 'EDIT', 'DELETE', and 'RSVP'. Below the options is a 'Notes' section with a red circle containing the number '2' and a checkbox labeled 'MEETING NOTES'.

There are two ways to access notes within Atlas:

1. In the system menu by clicking on "Notes"
2. Within a meeting by clicking on "Meeting Notes".

Notes

Make private annotations within Atlas



Notes are stored automatically and are private.

1. Export your annotation to be the Ata of the meeting (only meeting owners can do that)

2. Import the meeting data to start an Ata;

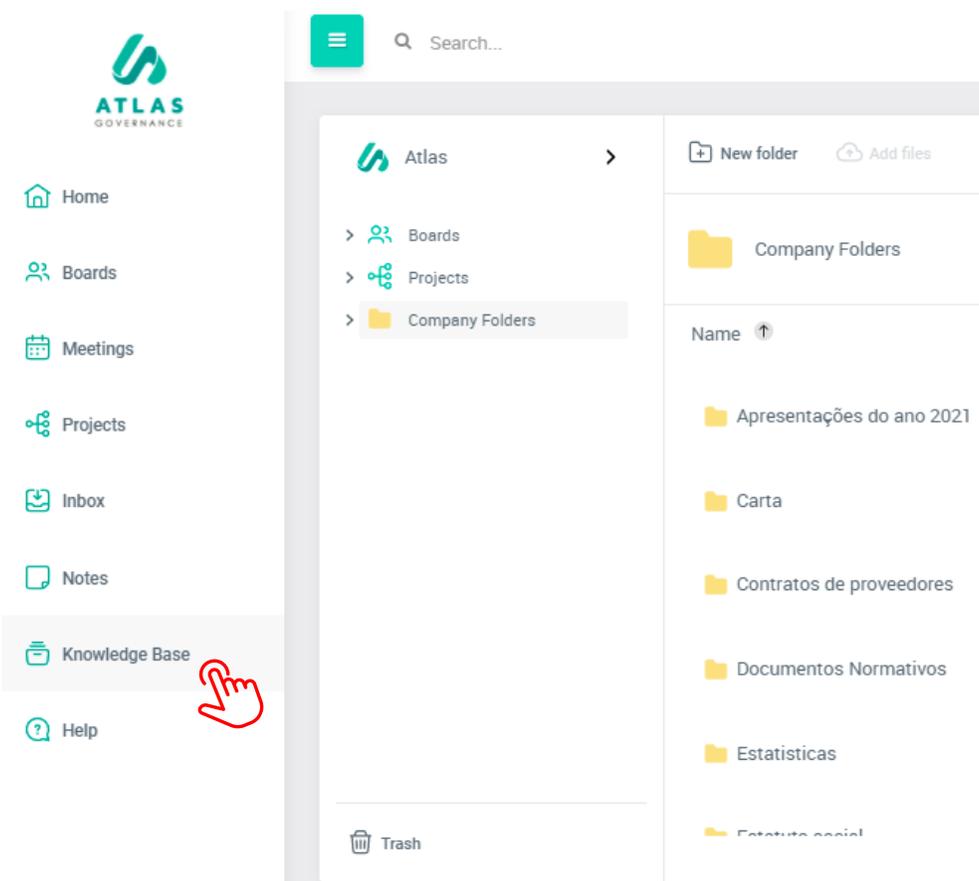
3. Share your annotation with another board member;

4. Shortcut to create an action for a user;

5. Delete the note;

Knowledge Base

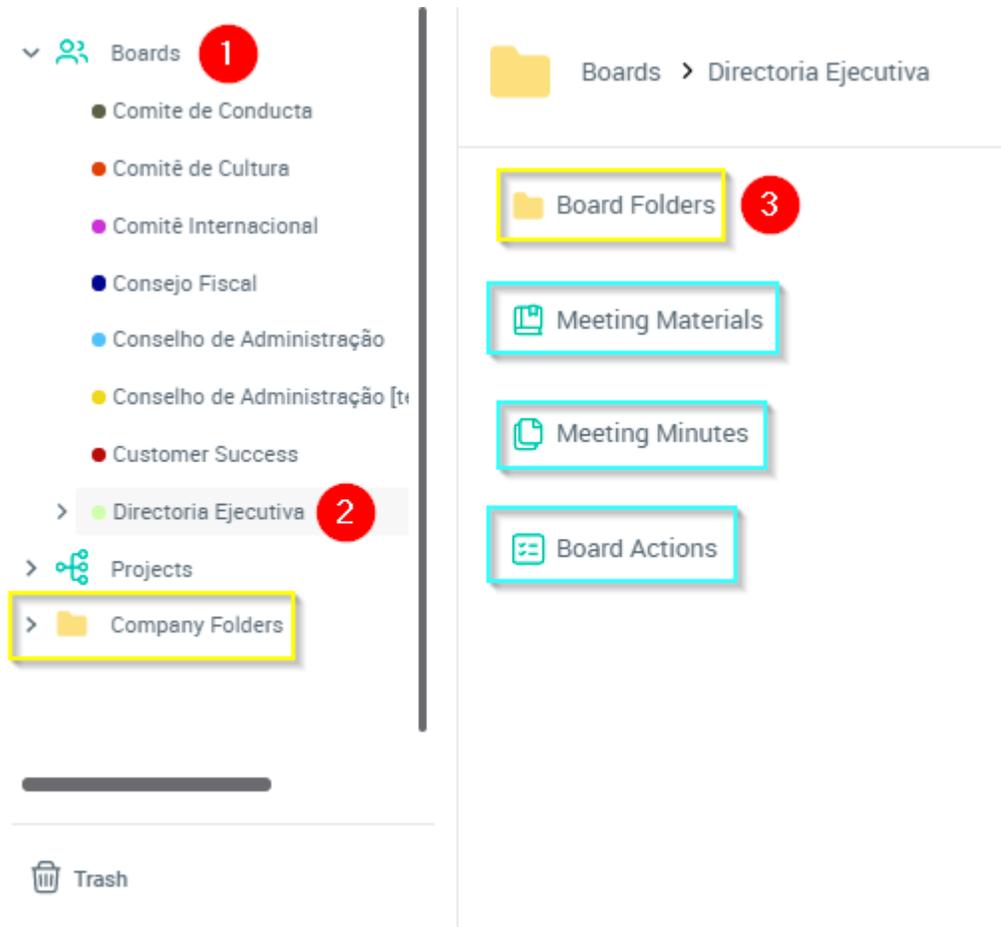
Access the documents of your Board



Every Board has its Knowledge Base, in other words, a library where you attach and download important and relevant documents to board members. To view the attachments available on this base, access the **"Knowledge Base"** option through the Menu, and then you will have folders and documents from each board that you participate.

Knowledge Base

Access the documents of your Board



1- Click "**Boards**" in the left corner;

2- Select the group in which you want to check the documents;

3- Click "**Board Folders**" to view the folders created manually by the owners of this Board.

Yellow folders: Are the board or company folders;
-The **board folders** are created by the Board owners, in which members can insert new documents
-The **company folders** are generated only by the portal administrators and the members help in managing them.

Green folders:
-**Green folders** are folders automatically fed by Atlas, that is, since the meeting owner adds materials, minutes or actions within the meeting, they are automatically brought to the Board Knowledge Base.

Search

Find content and documents through the Search System

The screenshot displays the Atlas Governance search interface. On the left is a navigation sidebar with icons for Home, Boards, Meetings, Projects, Inbox, Notes, Knowledge Base, and Help. The main content area shows a search bar with the query 'cultura' and a notification badge. Below the search bar, it indicates '50 results found for: cultura'. There are filters for user selection, 'Types', 'Start Date - End Date', and a toggle for 'Attachments only'. The results are ordered by default and list three items:

- Agenda Atlas - Comitê de Cultura** (Creation date: 08/06/2021)
 - Resultados de Cultura e Pessoas**
 - Comitê Cultura e pessoas_07_2021.pptx
 - Cultura e Pessoas | Cultura y Perso [...] [View more](#)
- Agenda Atlas - Comitê de Cultura** (Creation date: 08/05/2021)
 - El Reconcito Brasileño**
 - Presentación Comitê de Cultura.pptx
 - SAN PABLO COMITÉ DE CULTURA San Pablo COMITÉ DE [View more](#)
- Agenda Atlas - Comitê de Cultura** (Creation date: 08/06/2021)
 - Mudanças que geram resultados!**
 - Comitê de cultura Atlas_06082021.pptx

The Atlas search system consists of Artificial Intelligence (NLP - Natural Language Processing) to perform syntactic, morphological and verbal bending analysis on all content entered in the Atlas (typed or in files).

1. Search for a word of the document you need to find, to facilitate the search you can make filters. The system will do a deep search of the entire system.



Thanks for the partnership!

Customer Success Team:
Your success is ours!