



User Manual

FOR BOARD MEMBERS AND DIRECTORS

Featured by Customer Success Team



Welcome to the User Manual for members and directors.

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

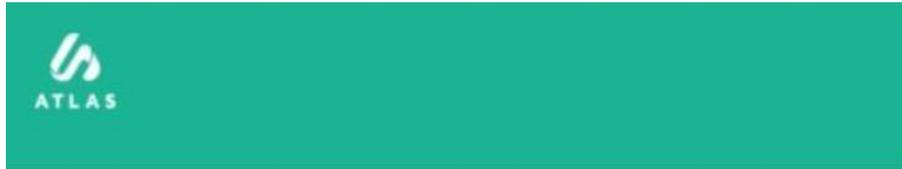
We created this manual to be your guide in your firsts steps of using the portal! But, you already know where to find us in case you have any questions :)

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

1 E-mail 1

Welcome to Atlas Governance registration

Prior to your user creation, we need to check your e-mail address for previous invitations:

Email address

NEXT >

2 Confirm your email 2

3 Define Password 3

4 Personal Data 4

5 Confirm your mobile 5

6 Finish

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;

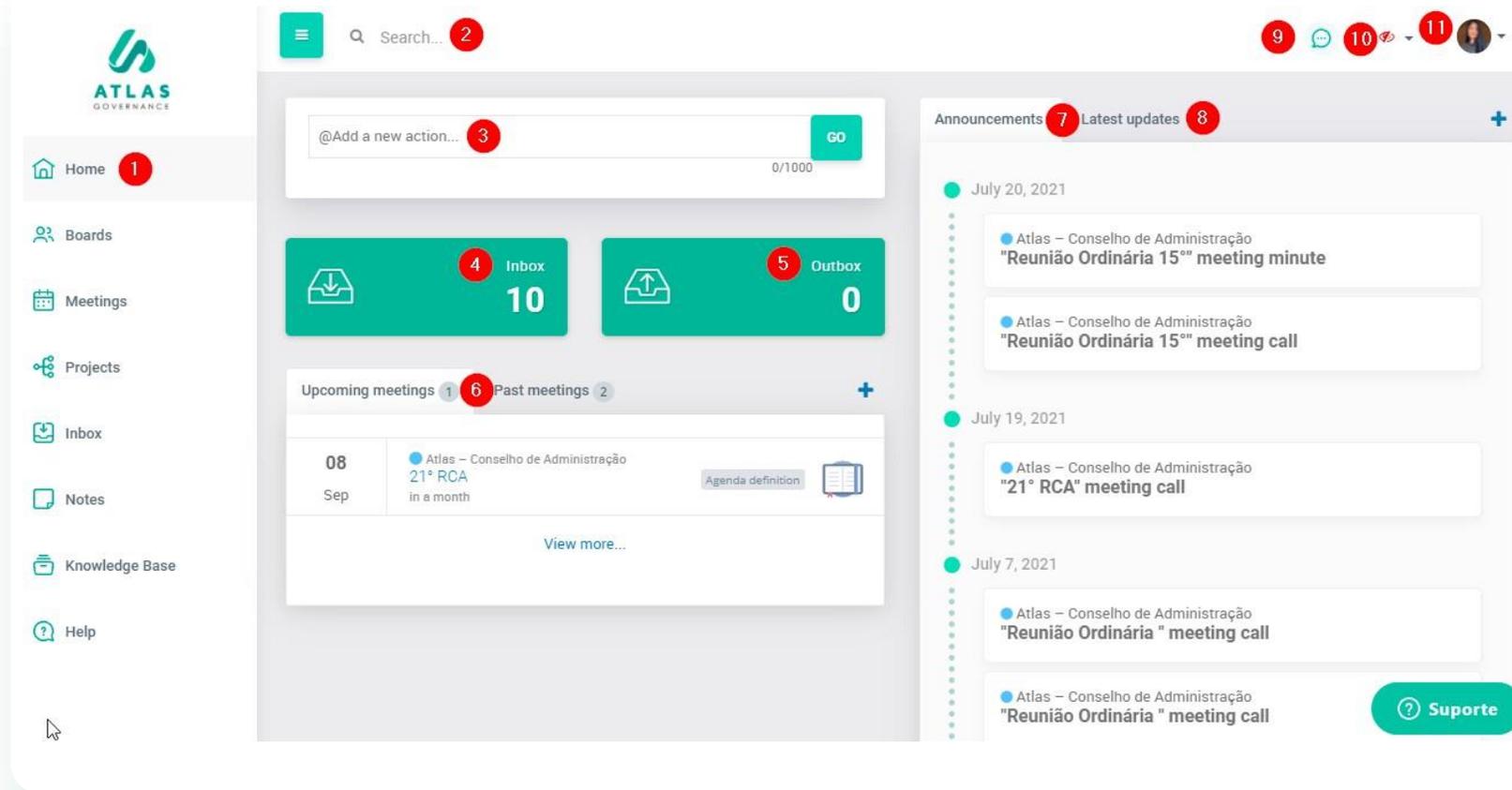
Passo 3: Set your password;

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

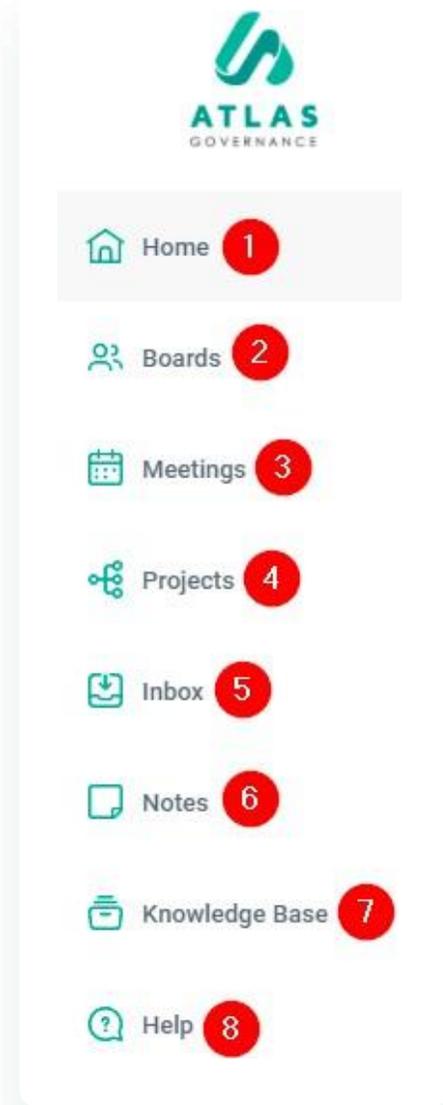
Know the Home screen shortcuts



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



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;

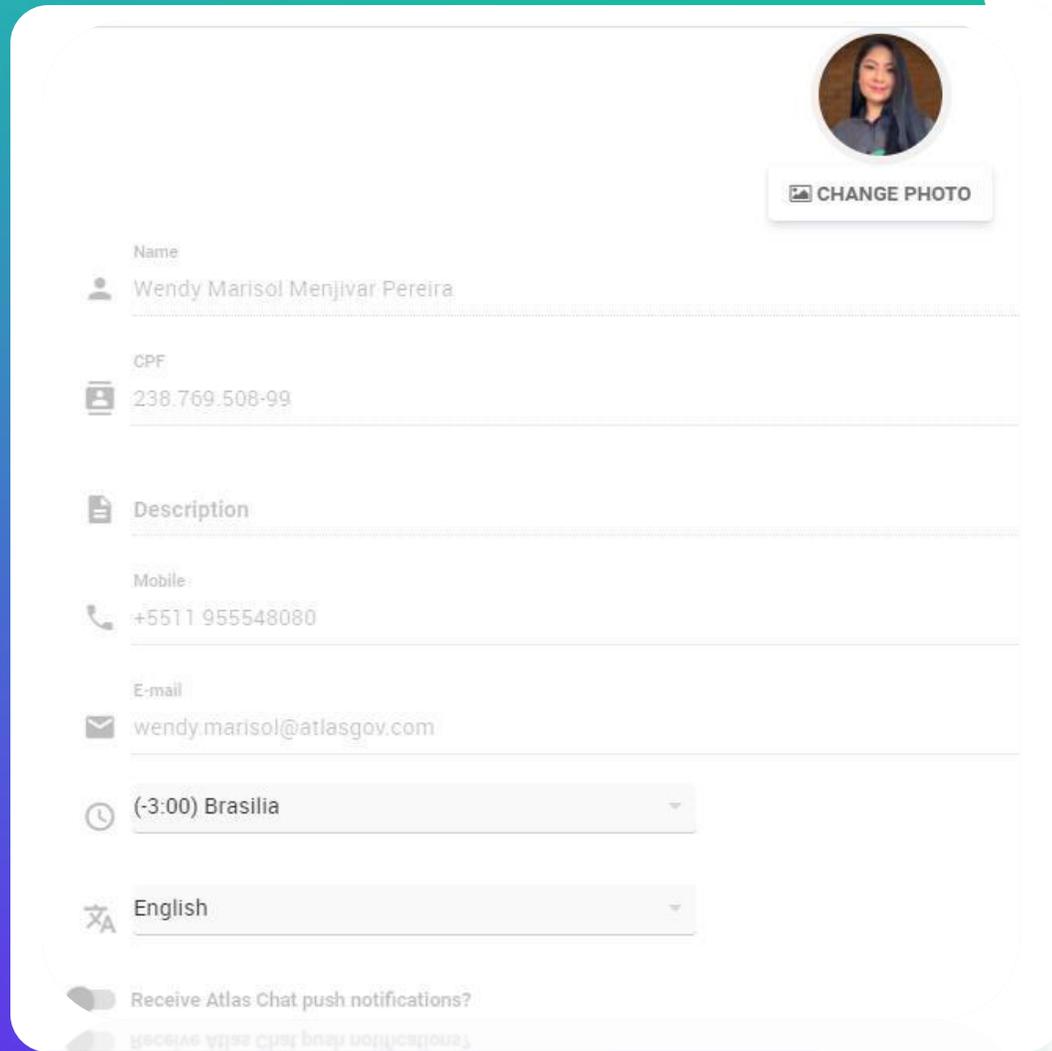
6.Notes – It's a notepad (all content is private and saved automatically), here you can also share your note with another member of your board;

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.

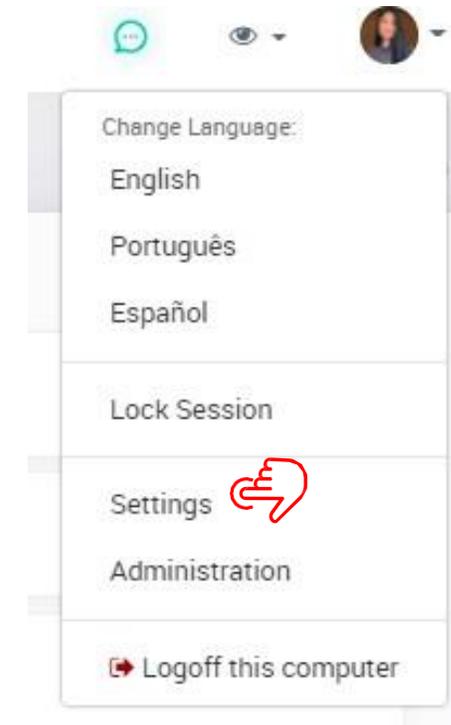
USER FUNCTIONS

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



A user profile form with the following fields:

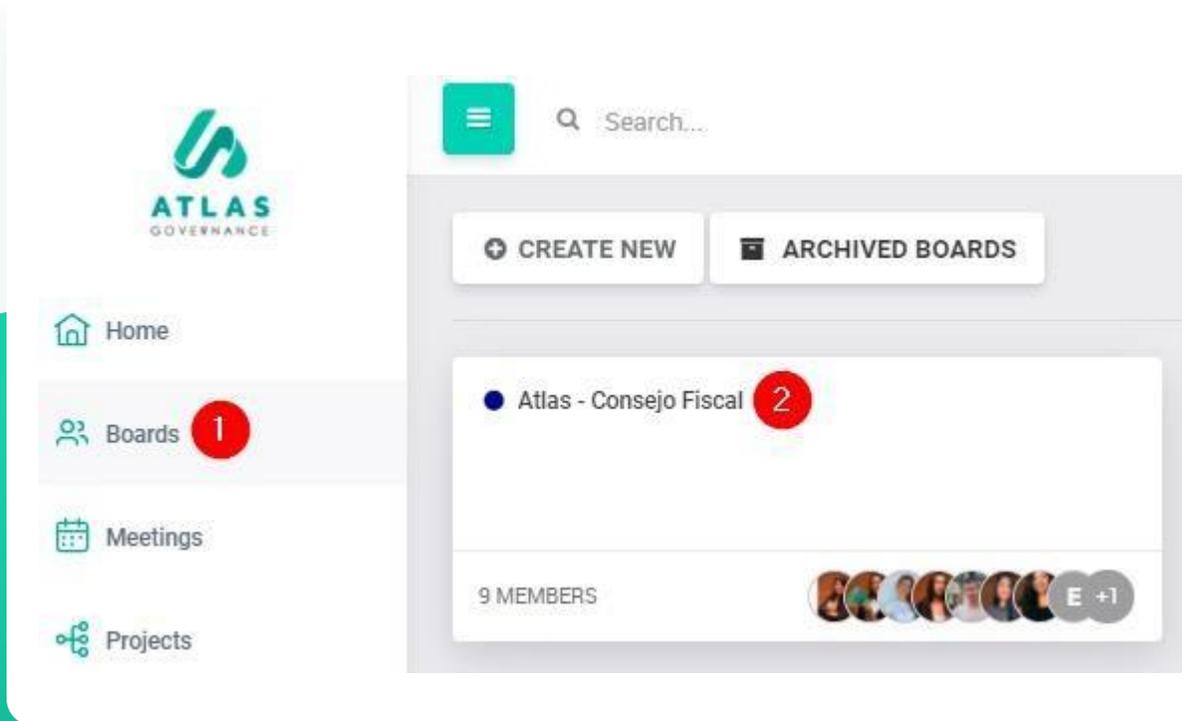
- Photo:** A circular profile picture of a woman with a "CHANGE PHOTO" button below it.
- Name:** Wendy Marisol Menjivar Pereira
- CPF:** 238.769.508-99
- Description:** (Empty text area)
- Mobile:** +5511 955548080
- E-mail:** wendy.marisol@atlasgov.com
- Time Zone:** (-3:00) Brasilia
- Language:** English
- Notifications:** Receive Atlas Chat push notifications? (Toggle switch is turned on)



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.

BOARDS

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.

BOARDS

Know your board



The screenshot shows a Microsoft Teams board 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 "Insert here the description". To the right of the title, there are two sections: "Owners" with 4 members and "Members" with 5 members. Below the title, there are two main sections: "Upcoming meetings" (1) and "Past meetings" (4). The "Upcoming meetings" section shows a meeting on "08 Sep" titled "Atlas - Conselho de Administração 21° RCA in a month" with an "Agenda definition" icon. The "Past meetings" section shows a meeting on "July 19, 2021" titled "Atlas - Conselho de Administração '21° RCA' meeting call". To the right of the "Upcoming meetings" section, there are two sections: "Announcements" (3) and "Latest updates". The "Announcements" section shows two announcements: "Atlas - Conselho de Administração 'Reunião Ordinária 15°' meeting minute" and "Atlas - Conselho de Administração 'Reunião Ordinária 15°' meeting call". The "Latest updates" section shows the same meeting call announcement. Red numbered callouts (1-6) are placed over the interface to highlight specific features: 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.

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.

MEETINGS

View voting and actions of the meeting

Atlas – Directoria Ejecutiva
RDE Semanal

Created in June 21, 2021 8:09 PM by Wendy Marisol Menjivar Pereira

Status: Ready

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

Owners: [Profile] +

Attendees: [Profile] [Profile] +

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.

MEETING

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.

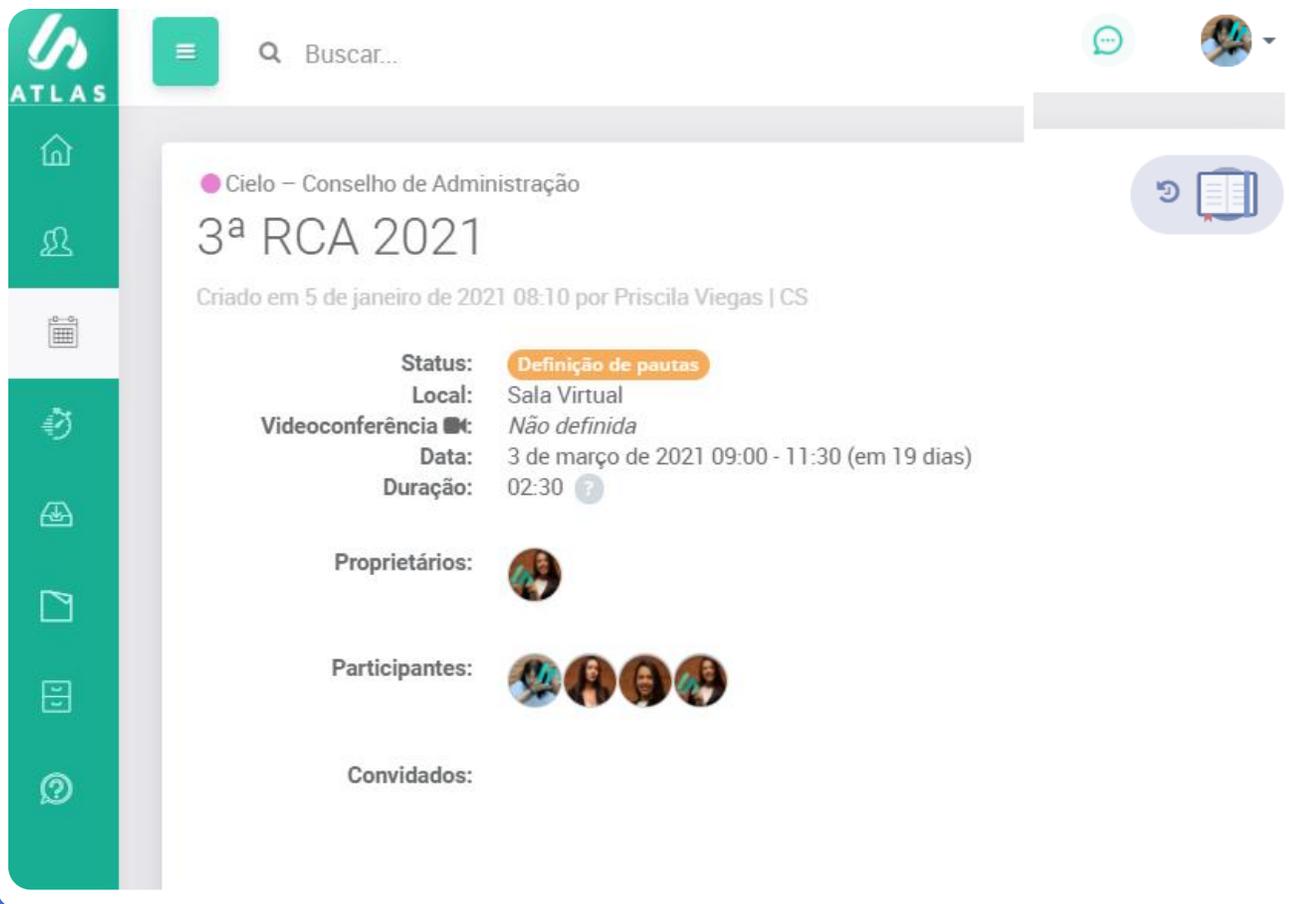
Published Minutes

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.

BLUEBOOK

How to access?



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.

BLUEBOOK

How to use?



Step 1: Access the Bluebook index;

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

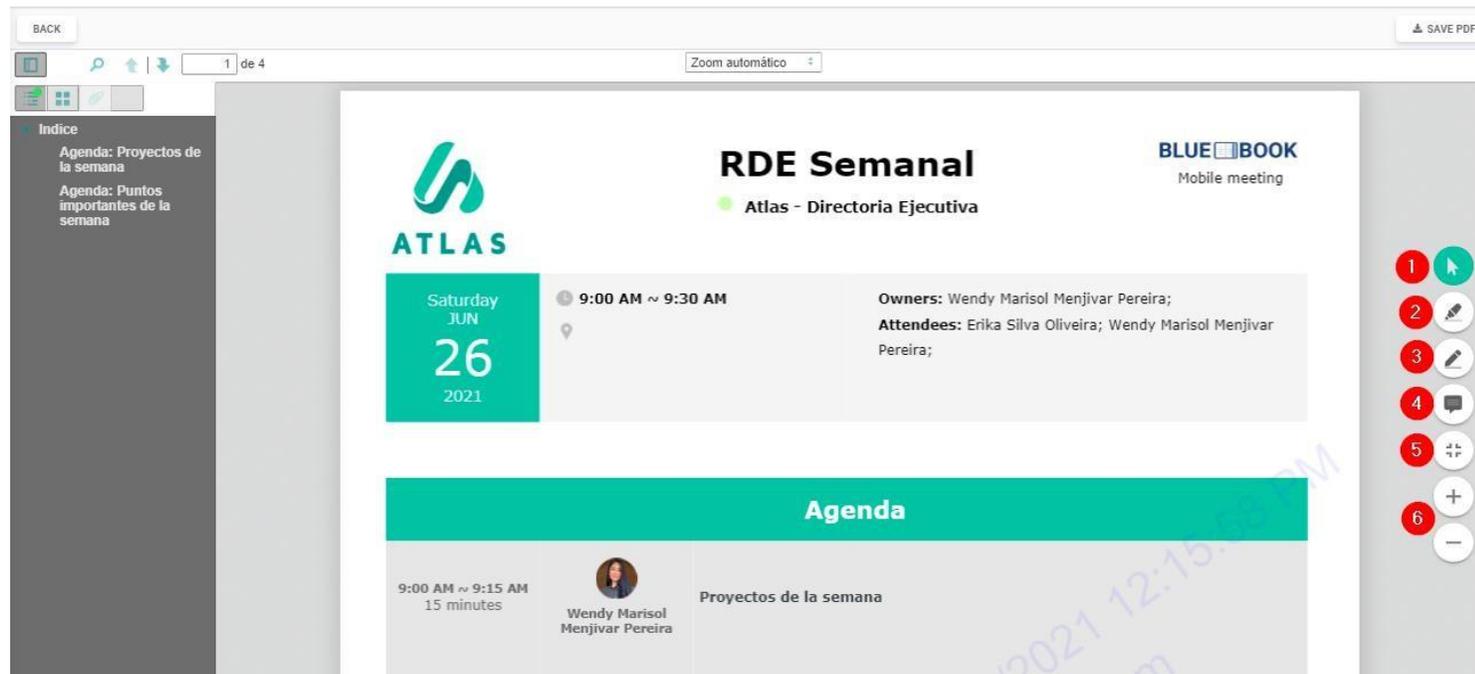
Step 3: Save the document on your machine, in watermarked PDF.

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.

BLUEBOOK

How to use scratch and highlight?

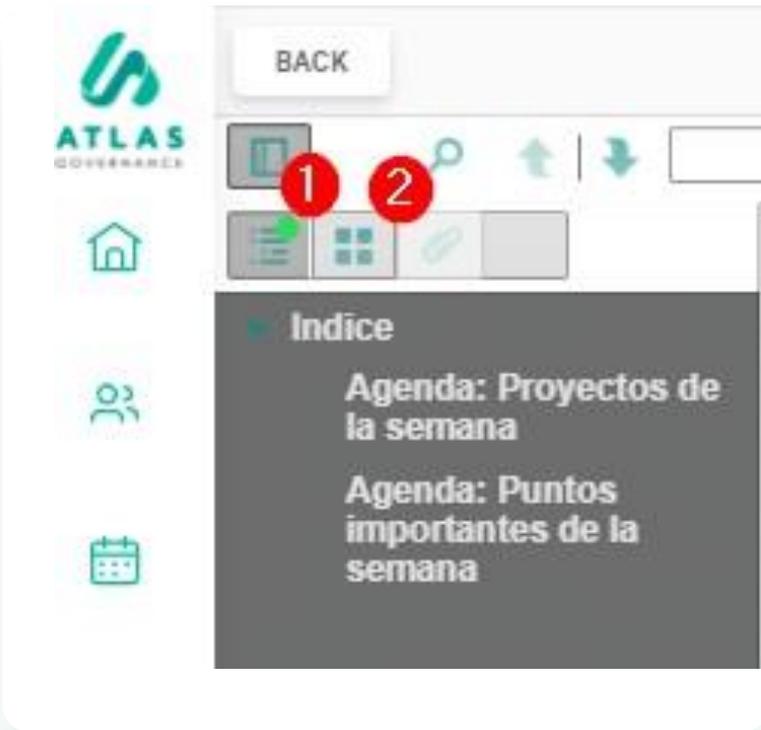
Scratch & Highlight is a tool that makes it possible to interact in the meeting's Bluebook, inserting notes in the pages that you need. Remember that these annotations are private by default. To use this feature is quite simple, do the following:



- 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.

BLUEBOOK

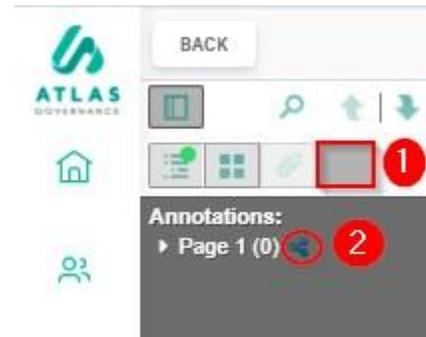
How to use?



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;

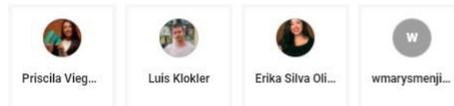
Step 2: Click in the Share icon: 

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...

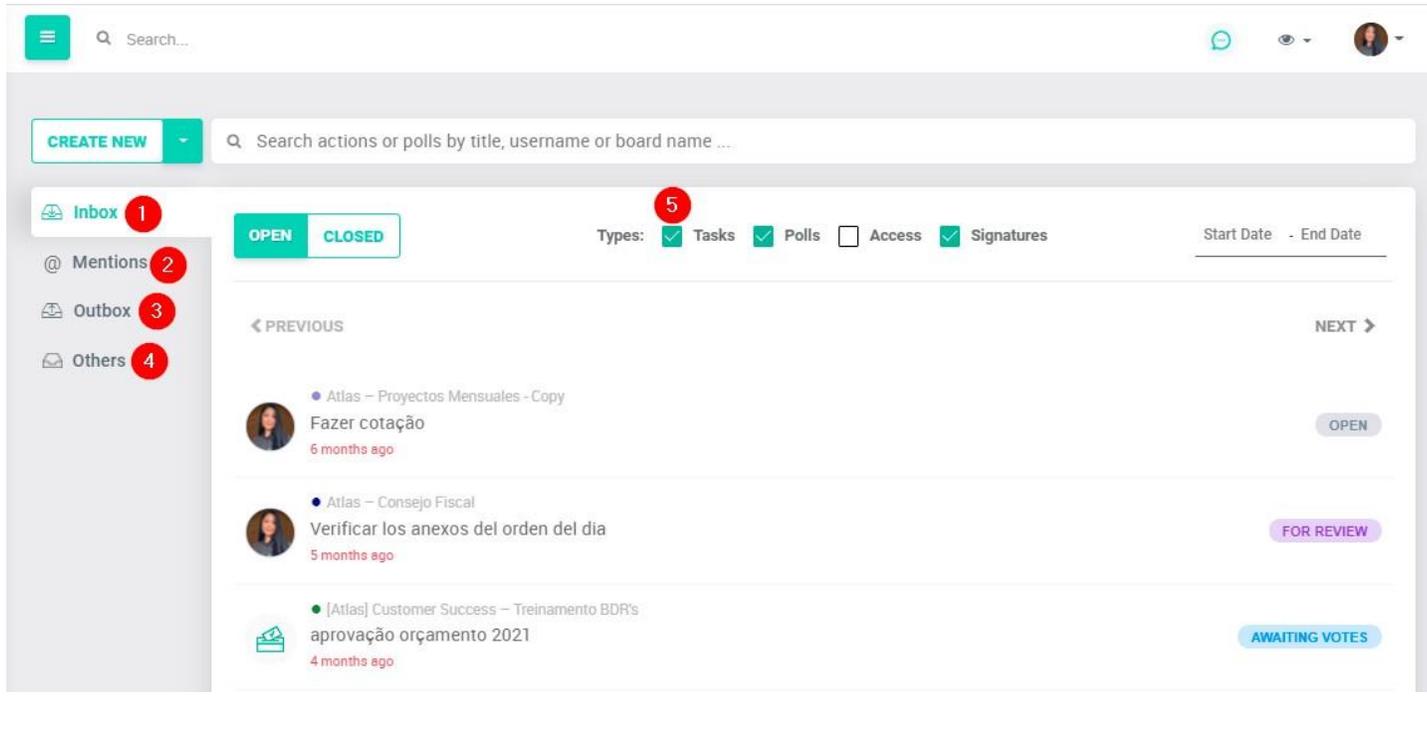


SELECT ALL



BLUEBOOK

Your pending in a single location



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.

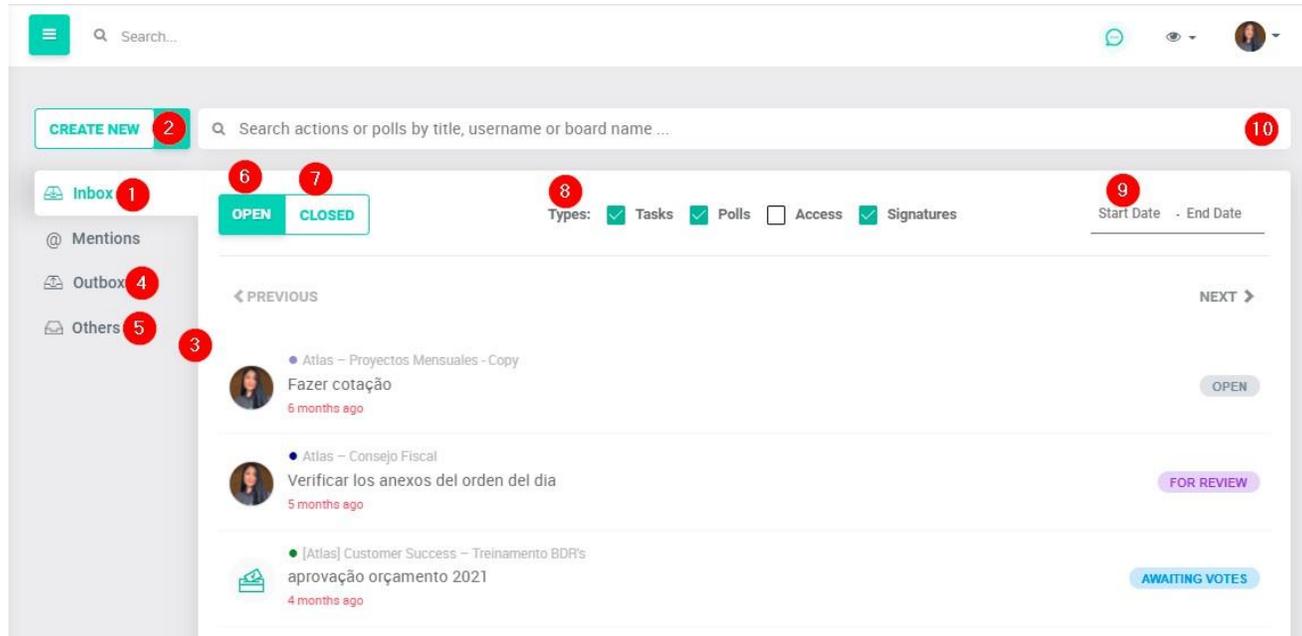
3. Outbox: Track all demands you have requested for another member;

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.

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.

INBOX

How to sign within your inbox.

The screenshot shows a software interface for an inbox. At the top left, there is a 'CREATE NEW' button. Below it, a search bar contains the text 'Search actions or polls by title, username or board name ...'. On the left side, there is a sidebar with navigation options: 'Inbox', '@ Mentions', 'Outbox', and 'Others'. The main area has a filter bar with 'OPEN' and 'CLOSED' buttons. Below the filter bar, there are checkboxes for 'Types': 'Tasks', 'Polls', 'Access', and 'Signatures'. The 'Signatures' checkbox is checked and has a red circle with the number '1' above it. To the right of the filter bar, there are fields for 'Start Date' and 'End Date'. Below the filter bar, there are navigation arrows for 'PREVIOUS' and 'NEXT'. The main content area displays a list of three items, each with a red circle containing a number. The first item is 'Electronic signature: reunião de teste com jana' with a red circle '1' next to it. The second item is 'Electronic signature: 12' with a red circle '2' next to it. The third item is 'Digital signature: Nova Pasta - Atas passadas.pdf'. Each item has a blue button labeled 'AWAITING SIGNATURE' to its right.

1. While filtering just signatures, you have an easier access to all the requests you need to sign;

2. Click on the request you wish to access;

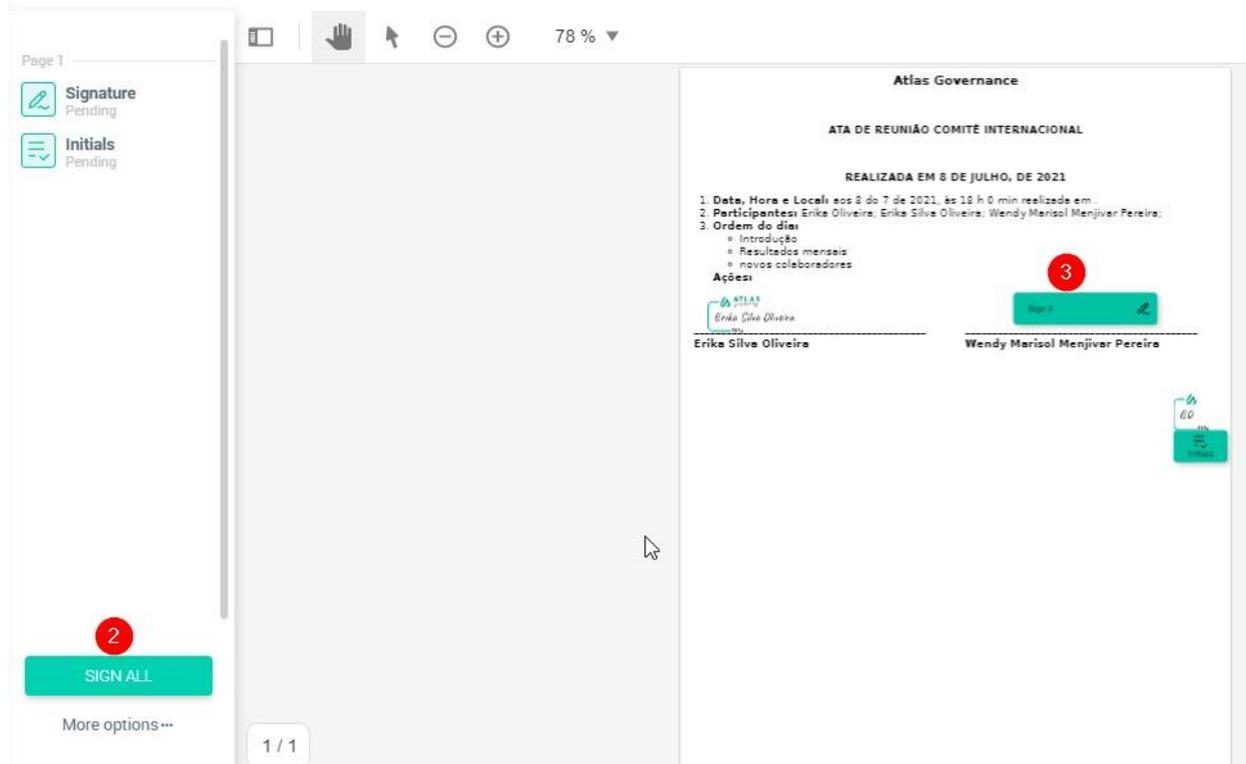
INBOX

How to sign within your inbox.

Please, read the [Terms and Conditions to use electronic signatures](#)

1 I have read, and i agree with the Terms and Conditions

CONTINUE



1- Click on "I have read, and agree with the Terms and Conditions";

2 and 3- You can choose wether to sign all at once or sign manually clicking on "Sign it".

INBOX

How to sign within your inbox.

BACK **FINISH SIGNING**

4

Just this step to confirm your signature.

Confirm the verification code

Enter the verification code you received on your cell phone *****-48080

5

RESEND CODE

SEND BY VOICE SEND BY WHATSAPP

BACK

4. Click on "Finish Signing" once you have filled everything, button located on the upper right side;

5. You can choose to receive the code by sms, Whatsapp or voice, after receiving fill in the token.

Done! Your document has been signed

Completed

Thank you! Your document has been signed.

An email will be sent once everybody has signed the document.

CLOSE

VOTING

How to vote

The screenshot shows a voting interface for a meeting titled "Approval of the minute". The meeting is in "Awaiting Votes" status, with a due date of 9/8/2021. The meeting is "Atlas - RDE Mayo 2021". There are 3 owners and 3 pending votes. The interface shows three voting options: "Yes", "No", and "Abstain", each with 0 votes. Below the voting options are tabs for "Comments", "Attachments", and "Poll report". A red circle with the number "1" is next to the "Vote pending" text. Red circles with numbers "2", "3", and "4" are placed above the "Comments", "Attachments", and "Poll report" tabs respectively. At the bottom, there is a rich text editor with a toolbar and a text input field labeled "Enter new comment...".

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.

ACTIONS

Execute an action.

The screenshot displays the Atlas Actions interface for a task titled "Aprobar el Acta de Junio de 2021". The task is assigned to Wendy Marisol Menjivar Pereira and has a status of "Pending". The interface includes fields for "Assigned to:", "Subscribers:", and "Reviewer:". A "Description:" field is present but empty. The "Meeting:" field is set to "Atlas - RDE Semanal". The "Due date:" is "4/8/2021". The "Status:" is "Pending". The interface also features a "Comments" section with a red circle containing the number "2", and an "Attachments" section with a red circle containing the number "3". A rich text editor is visible with a toolbar and a list of users: Priscila Viegas, Luis Klokler, Wendy Marisol Menjivar Pereira, and Erika Silva Oliveira. At the bottom, there are two buttons: "SUBMIT FOR REVIEW" (with a red circle containing the number "4") and "MARK AS FINISHED" (with a red circle containing the number "5"). A "CLOSE" button is located at the bottom right.

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;

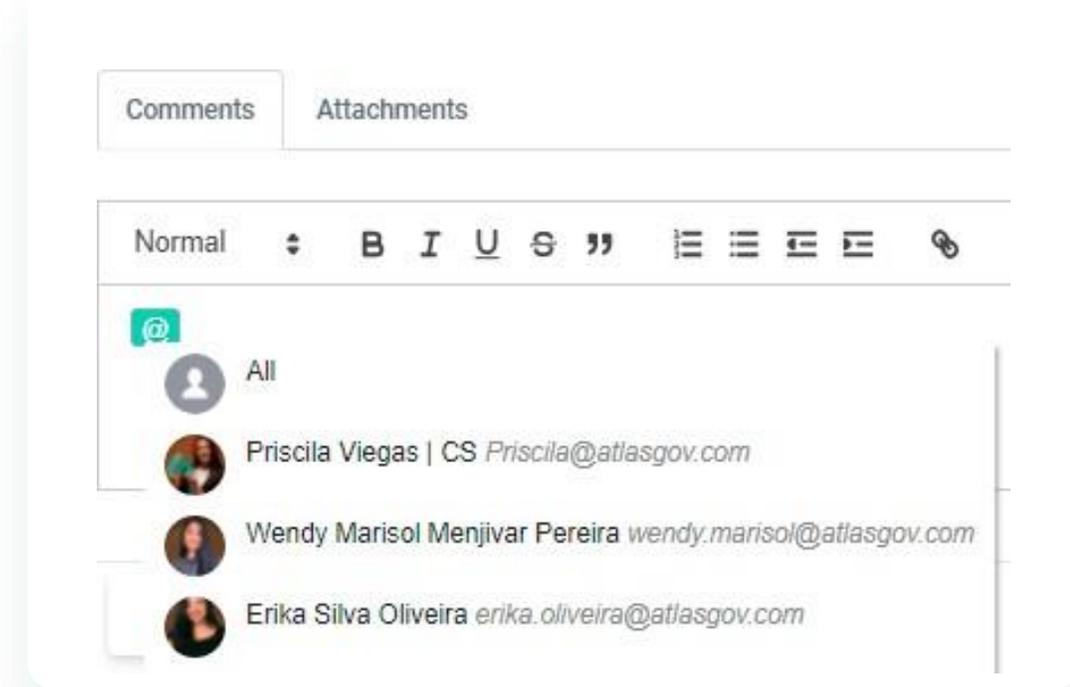
4: Send action for

review; 5: Finish

action

COMMENTS

Comment within Atlas and mention people



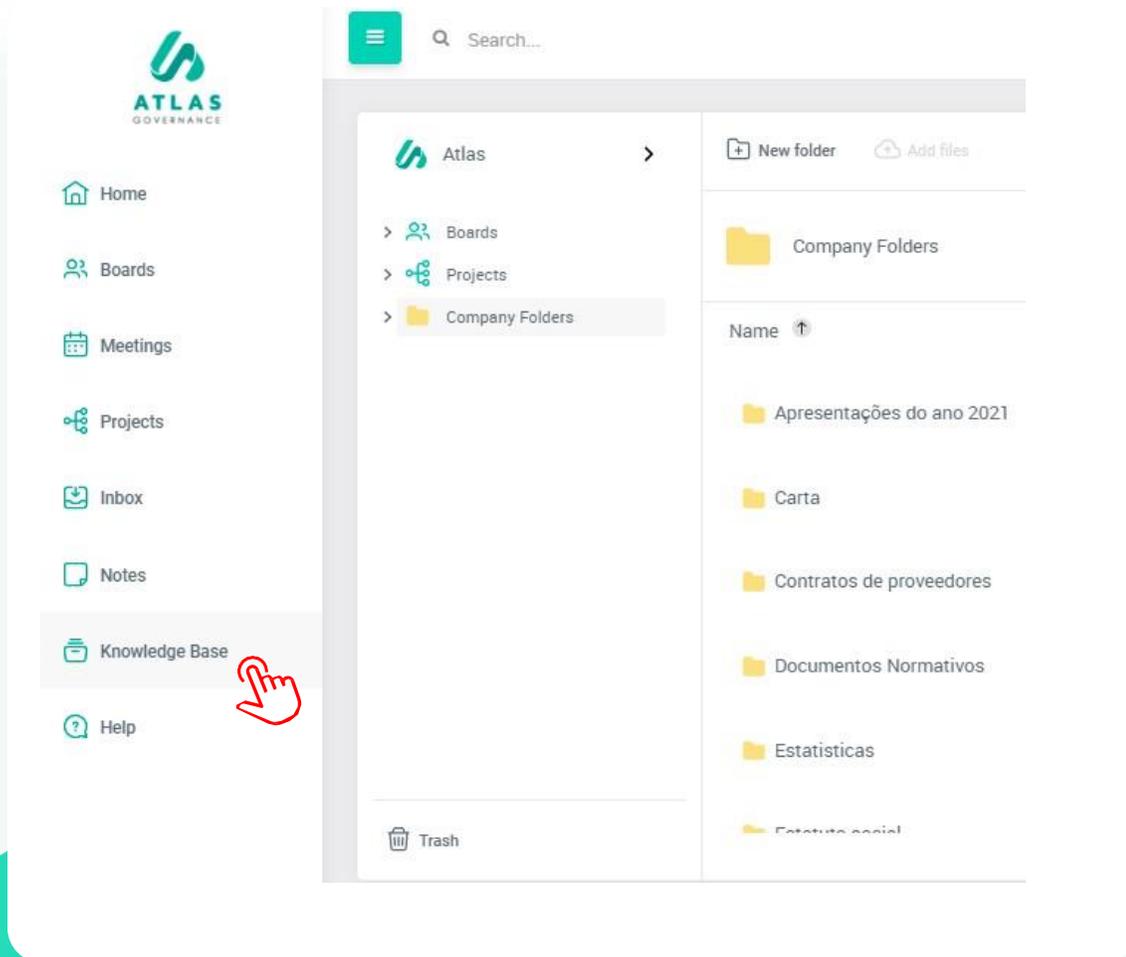
Members mentioned with @ will receive an email notification

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.

KNOWLEDGE BASE

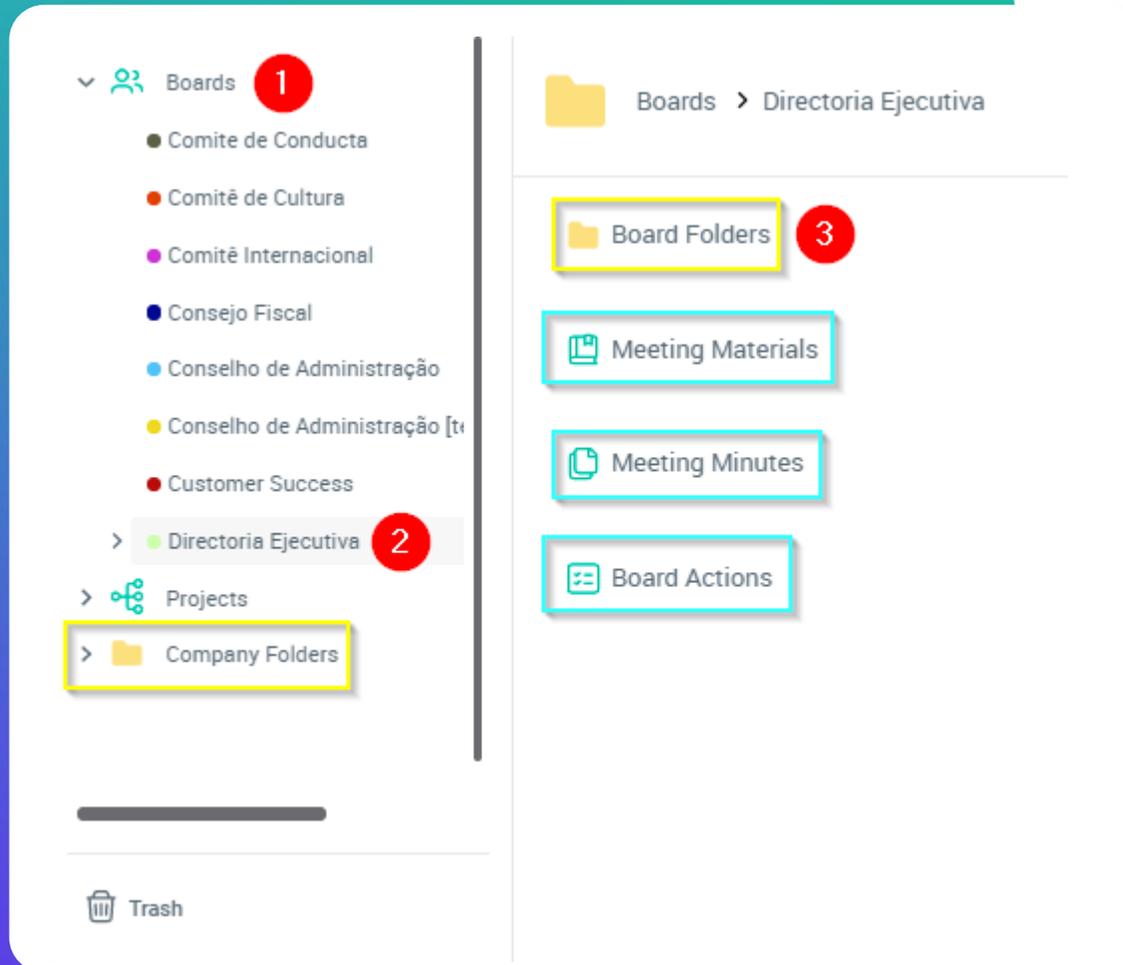
Access the documents of your Board



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 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 icon. Below the search bar, it indicates '50 results found for: cultura'. There are filters for user, types, start/end dates, and an 'Attachments only' toggle. The results are ordered by default and include three items:

- 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](#)
- 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](#)
- 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.

Thank you!
Customer Success Team



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