



# The Board Portal Disconnect: Are you settling for less when you go offline?

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*Working while on the move. It's why board portals were created. But unfortunately, the offline versions of many portals don't live up to the promise when it comes to being simple and secure.*

Board portals have, literally, lightened the load for directors as they travel to board meetings. Portals also prevent huge attachments from getting stuck in inboxes by allowing users to download PDFs into offline folders or repositories. While this is progress, should you be expecting more? Yes, if you are leaving a lot of features behind when you go offline.

## **USABILITY**

Just when you thought you knew your new board portal, you have to access it offline. Most likely, you have to resort to manually downloading the documents you need, or if you're lucky, your portal will automatically sync them to you. Either way, the process transports you into a new environment, with unfamiliar layouts and navigation. You're left to sort through a stack of PDFs with no easy way to find specific information.

Worse, many of the features you have online aren't available in offline mode. On many systems, you can't annotate. Even if you can, if there's no integration between the downloaded material and the board portal's back-end server, you won't be able to sync your notes and changes. Instead, you have to purge old files and manually



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download new versions, leading to multiple versions of the same document, which is difficult to manage.

Ultimately, to gain the best experience with these board portals, executives need to be continually connected.

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*When you leave your online board portal, you don't have to leave the most useful features behind.*

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### SECURITY

You don't expect security to disconnect when you do. Yet, many portals rely on PDFs, which use minimal encryption. Systems that depend on PDFs may encrypt at the folder level or provide a secure container, but that still leaves downloaded PDF documents vulnerable.

If the device storing the documents is lost or stolen, the content is only as safe as the encryption and password protection on the container or folder. Contrary to what many believe, you can't purge documents and notes remotely as long as the device remains offline. And if administrative control of locally copied content is lost, board documents and directors' notes and annotations can remain on their hard drives subject to discovery or theft at a later date.



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### FINDING A TRUE OFFLINE MODULE

When you are considering a board portal, ask these questions so that you know its true offline capabilities:

- ▶ Are the offline and online experiences identical?
- ▶ Do users need to learn two sets of functionality, layouts or file structures?
- ▶ When users lose connection, will they have to login again to the offline version?
- ▶ Will the portal automatically monitor for a resumed connection and not require another login?
- ▶ Does the portal rely on PDF or other third-party technology's security?
- ▶ At what level is encryption built in: page, document, folder or container? At multiple levels?
- ▶ Do you leave your board portal system when you go offline, or do you stay in the same "closed loop" system, regardless of whether you are accessing it online or offline?

Diligent understands the challenges of going offline. Our Diligent Boards™ product offers a secure, easy-to-use and fully functional offline module. Contact us to see the difference.

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