

Shifting from Username Sign-in to Using Email

FAQ

This article provides answers to frequently asked questions about the new use of email to sign-in, what users can expect to see while we request your emails, and how you can set preferences about how Diligent uses your email to contact you.

Q: What change is taking place with email?

A: Diligent Boards now requires the use of email addresses to log-in, replacing the previous use of usernames. This means, use of customized usernames (ex: John Doe, jdoe, etc.) will no longer be an option to sign in. If you currently log in with an email address or SSO, you will not be affected by the change.

Q: Why is Diligent shifting to email instead of using usernames for log-in?

A: Diligent is committed to assuring the highest security standards in its software products, and the use of email is the latest standard in best-in-class security management.

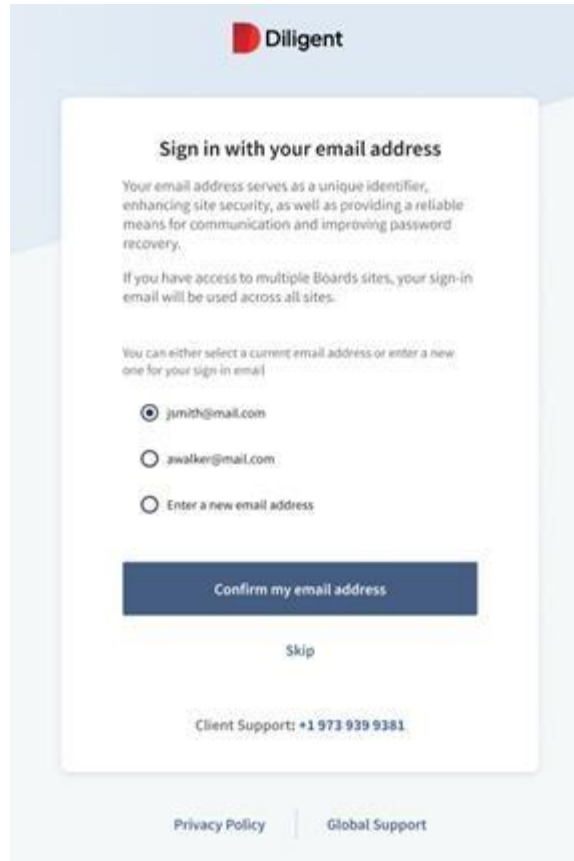
This measure not only ensures unique user identities within the platform, but we also expect to see improved user experience:

1. Enhanced user experience - no more forgotten username; if you know your email address, you know your Login
2. Easier password resets - no need to contact admins or Support to reset passwords. Users can reset it themselves like all modern apps via the 'Forgot your Password?' option on the Sign-in screen.
3. Enhanced security - sign-in emails are the new standard in security practice and have proven to be more resistant to security threats.

Q: What can users expect as Diligent prompts them to provide their preferred email for the new log-in requirement?

A: After a user successfully signs in to Boards with their current username and password, they are redirected to the screens where the product will request the user to provide a preferred email.

First, users must decide which email should be designated as the sign-in email. They can either select a current email address on file or enter a new one.



Diligent

Sign in with your email address

Your email address serves as a unique identifier, enhancing site security, as well as providing a reliable means for communication and improving password recovery.

If you have access to multiple Boards sites, your sign-in email will be used across all sites.

You can either select a current email address or enter a new one for your sign-in email.

- jsmith@mail.com
- awalker@mail.com
- Enter a new email address

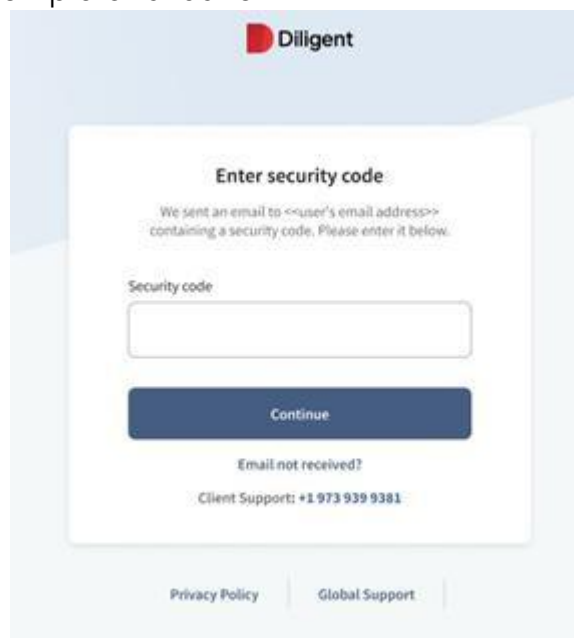
[Confirm my email address](#)

[Skip](#)

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If the user doesn't have a validated email address on file, or if they entered a new email address, Diligent sends an email containing a security code. The user enters the security code on the next screen to complete validation.



Diligent

Enter security code

We sent an email to <<user's email address>> containing a security code. Please enter it below.

Security code

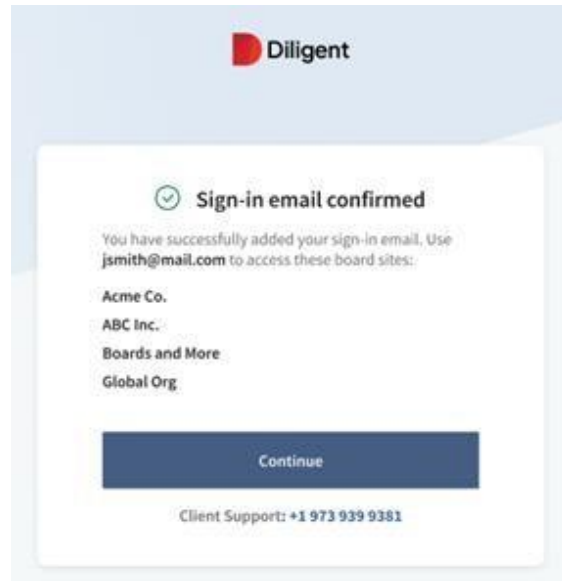
[Continue](#)

[Email not received?](#)

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Once the sign-in email is confirmed, the user continues to their Boards site.



Q: Will this process prevent directors from accessing their board materials?

A: No, for convenience, you can temporarily bypass the email promotion screens to access their boards materials quickly. If you need to sign in multiple times, you can skip the email promotion step as many times as they want within a 24-hour period. After the first 24-hour time period, users' have two more similar opportunities to skip the email promotion screens before it becomes mandatory.

Q: What is a sign-in email address and what is the difference between sign-in email address, account email, and board/contact email?

A: The **sign-in email** is a user identifier, just like a username. While it has the email format, it is not used for communication purposes. The sign-in email is a designated credential to access Diligent Boards. Any communication related to the account or book content are distributed via the account email or contact/board email on file.

The **account email** is used for receiving security notifications about events that impact the user account (e.g. account lockout, password expiration). The self-service password recovery process also uses this email for delivering verification codes for resets or recovering site names or login emails. This type of email is not board/organization specific and is shared across all sites in the case of overlapped users.

The **contact/board email** is used for organization/site specific notifications (e.g. notifications about books, documents, and votes). This email is dedicated to each site and



can be set up and amended by both the user and their Contact Admins, and will display in the User Grid. Each user can only have one Contact email for each board/organization/site.

For more information on the type of user notifications in Boards, review the next question.

Q. What types of user notifications exist in Boards and where are they sent A:

There are two types of user notifications in Boards:

- **Security notifications:** For informing the user about events that impact their account, such as their password expired, their account is locked, etc. Security notification emails are sent to the user's account email on file. Notification emails about the selfservice recovery processes are also sent to the user's account email. These emails deliver verification codes or recover site names and sign-in emails.
- **Content notifications:** For updating the user about changes to the materials within their Board sites, including new book content, votes, or questionnaires. Content notification emails are sent to the user's board (contact) email on file.

Q: Does the upgrade have any effect on accessing sites and content?

A: No, the upgrade process does not have any effect on accessing sites or content. Users can access their accounts and materials as before. The only change is during the sign-in process: instead of a username, users must enter their email address.

Q: Can I still receive notifications to the email address I promoted to sign-in email? A:

Yes, notifications are still sent to sign-in emails after the upgrade.

Q: I use two different username and password combinations for my two Boards sites. After the upgrade, will I need to use the same username and password for both accounts?

A: No, you can continue to maintain two distinct accounts, provided you designate a different email address to sign in to each one.

Q: I use a common username and password for all my sites, but my notifications go to different email addresses, depending on which company they are for. How does this change impact my configuration?

A: In this case, we suggest upgrading your username to a common email address and retain the same password. We also recommend using a personal email, rather than one that's tied to either organization you support. However, regardless of the email address you use to sign in, you can continue to receive notifications to the existing emails you have on file for each site.



Q: How will I know which email can be upgraded to sign-in email?

A: Users can select any of their email addresses that are already registered in Boards. If the selected email conflicts with a setting in their Diligent account, or if it already exists in the datacenter, an error message is displayed.

Q: What if I can't make time to complete the email upgrade?

A: Users can skip the email promotion screens to postpone the email promotion step. If email verification isn't for a site, users can skip the verification step unlimited times. If verification is required, users can skip up to three times.