



## User Guide

# ExecAssist™ (for Executive Assistants and Travel Arrangers)

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## Infotriever User Guide - ExecAssist™ (for Executive Assistants and Travel Arrangers)

### Overview

Infotriever ExecAssist is a feature of the Infotriever service that enables Executive Assistants<sup>1</sup> to add events and contacts into their Executives' organizers, with the Executives' permission. One of the most popular uses of Infotriever ExecAssist is to enable Executive Assistants and/or Travel Arrangers to add travel itineraries to their Executives' calendars.

**Note:** There must be an Executive Assistant, and at least one Executive to set up Infotriever ExecAssist. We recommend that the Executive Assistant and the Executive set up Infotriever ExecAssist together - please refer your Executive to Infotriever User Guide – ExecAssist for Executives for more information.

### Requirements

To set yourself up as an Executive Assistant on Infotriever ExecAssist, you will need:

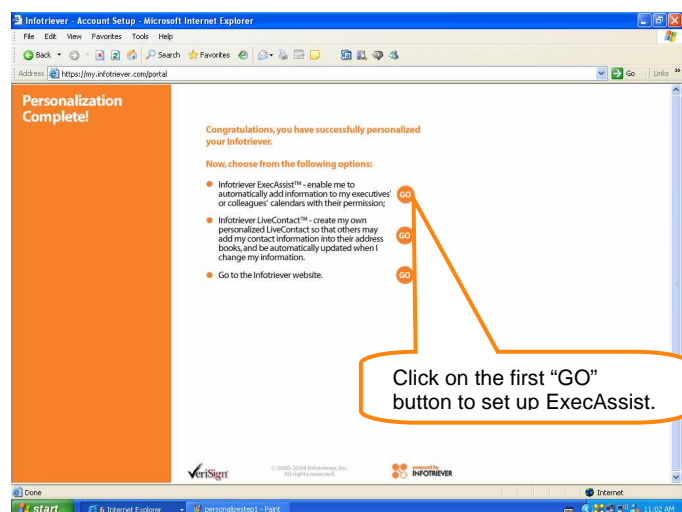
- A live internet connection.
- The Infotriever software downloaded and installed on your computer (note: if you do not have the Infotriever software downloaded and installed on your computer, please refer to Infotriever User Guide - Download and Installation).
- To have personalized your Infotriever desktop software (note: if you have not personalized your Infotriever desktop software, please refer to Infotriever User Guide – Personalization).

### ExecAssist Setup (for the Executive Assistant)

**Note:** Please view this section only if you have just completed the Infotriever User Guide – Personalization. If you were already a personalized user, please proceed to the alternate starting point 1. ExecAssist Setup (from Desktop).

#### 1. ExecAssist™ Startup (from Personalization)

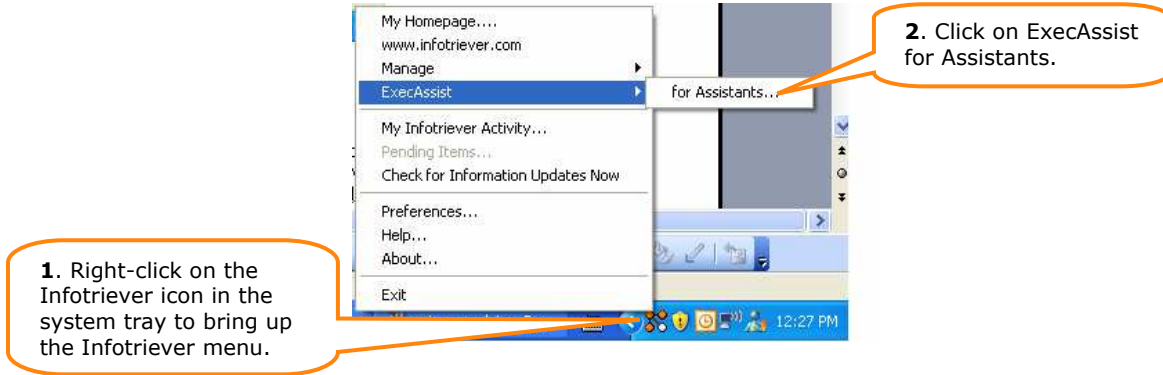
Once your Infotriever personalization has been completed, click the 1<sup>st</sup> "GO" button for **ExecAssist** setup.



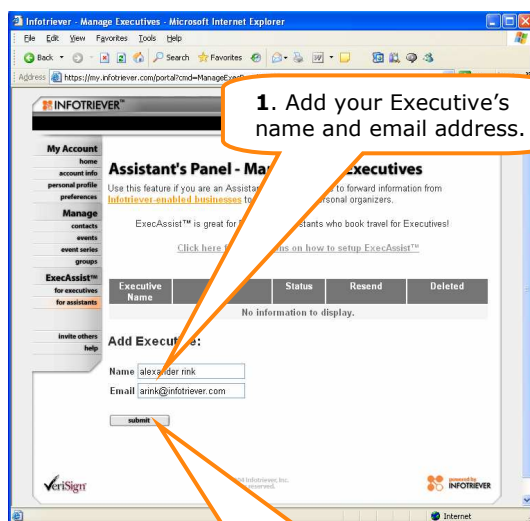
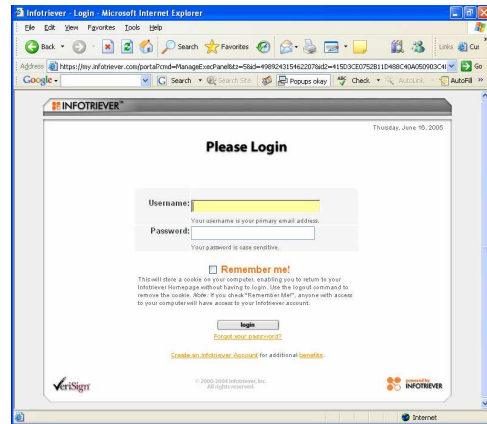
<sup>1</sup> For the purposes of Infotriever ExecAssist, the "Executive Assistant" is any Infotriever user who has been granted permission by an "Executive" to post information into his or her organizer through the Infotriever service (where the Executive may be an executive, boss, work colleague, friend, family member, etc.).

**1. ExecAssist Startup (from Desktop)**

Right click on the Infotriever icon in your system tray on the bottom right-side of your screen, and select ExecAssist > for Assistants.


**2. Login.**

Please enter your userid and password to login and access the Infotriever Assistant's Panel.



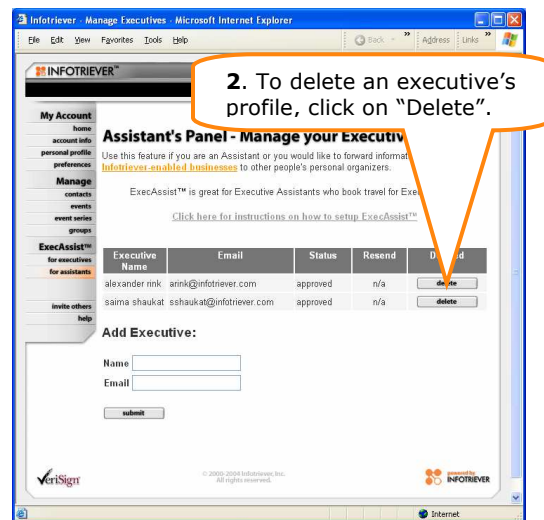
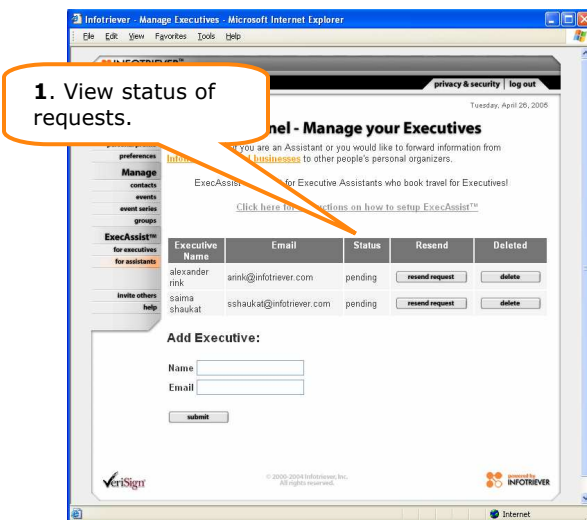
- 3. Add an Executive.** Add an Executive's name and email address in the space provided, and click on the **"Submit"** button. Once you have submitted one name, you can enter as many others as you like.

All Executives you add on this screen will receive an email from you sent through Infotriever requesting their permission for you to become their Infotriever Executive Assistant. Once they grant you permission, you will be enabled to enter information into their organizers. (**Note:** For more information on what Executives receive and the actions they need to take, see Infotriever User Guide – ExecAssist™ for Executives.)

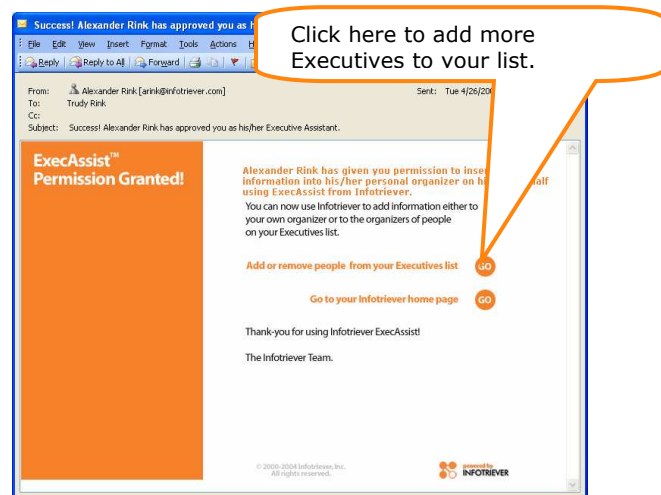
- Review Status.** At any time, you may view the status of your permission requests to your Executives on the Manage Your Executives page.

A "Pending" status means that the executive has not yet responded to your request. You can resend the request as a reminder to them by clicking on the "Resend Request" button.

If you wish to delete an executive from your list, simply click on the "Delete" button beside that Executive's name. Once you click on "Delete", you will no longer be able to add event or contact information into their organizer. If you decide later on that you still require access to that executive's organizer, simply add them again to your list, and wait for their approval.



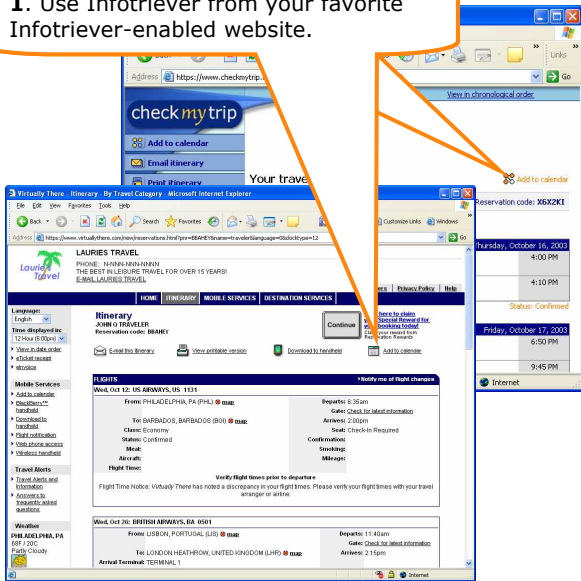
- Permission Granted.** Once your Executive has approved your request to be their Executive Assistant, you will receive notifying you that their permission was granted. Once you receive this email, the status of that Executive will change from Pending to Approved, and you will be enabled to add items to your Executive's organizer.



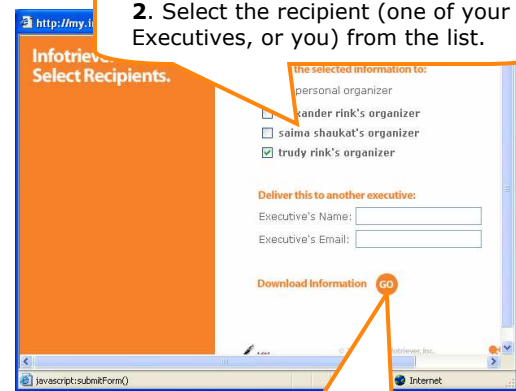
### Downloading to your Executive's Organizer.

Now that you have successfully set up ExecAssist, you will be asked to select who will receive the information each time you do a download. At this point, you can select any of the Executives that have an approved status, you can select yourself, or you may add another Executive from this web page – though you will need to get their approval prior to the information being added to their organizer. Once you have made a selection, click on the orange Download Information "GO" button to initiate the download.

1. Use Infotriever from your favorite Infotriever-enabled website.



2. Select the recipient (one of your Executives, or you) from the list.

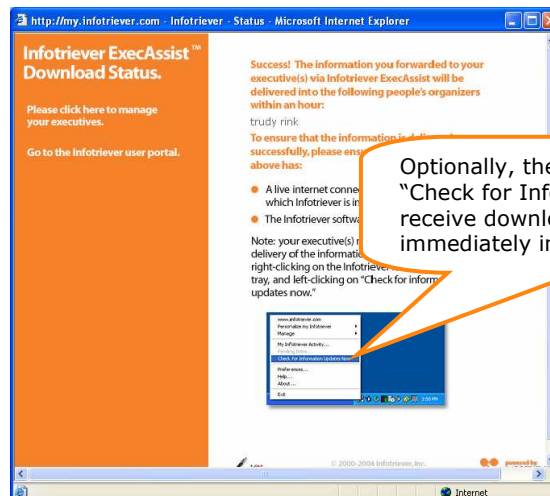


3. Click "GO" to download.

### 6. Download Status.

Once the information has been successfully queued for delivery to your Executive's organizer, the Infotriever ExecAssist Download Status page will be displayed.

**Note:** The information you downloaded for your Executive will appear in their organizer within an hour. At any time, your Executive may retrieve the information immediately through Infotriever by right clicking on the Infotriever icon in the system tray, and selecting the "Check for Information Updates Now" menu item.



Optionally, the Executive may select "Check for Information Updates Now" to receive downloaded information immediately into their organizer.