



# INFOTRIEVER

## User Guide

### ExecAssist™ (for Executives)

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# Infotriever User Guide - ExecAssist™ (for Executives)

## 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 Assistant to Infotriever User Guide – ExecAssist for Executive Assistants and Travel Arrangers for more information.

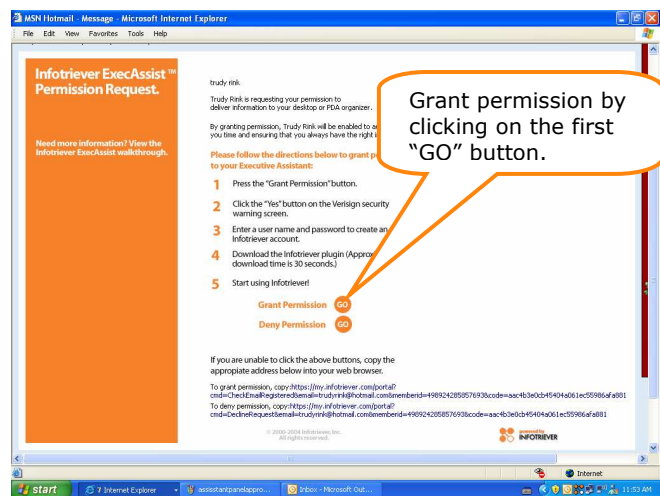
## Requirements

To set yourself up as an Executive 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)

1. **Grant Permission.** The first step for the Executive is to Grant Permission to the Executive Assistant through the email that you will receive when your Executive Assistant adds you to his or her list of Executives. Simply click on the orange Grant Permission "GO" button.

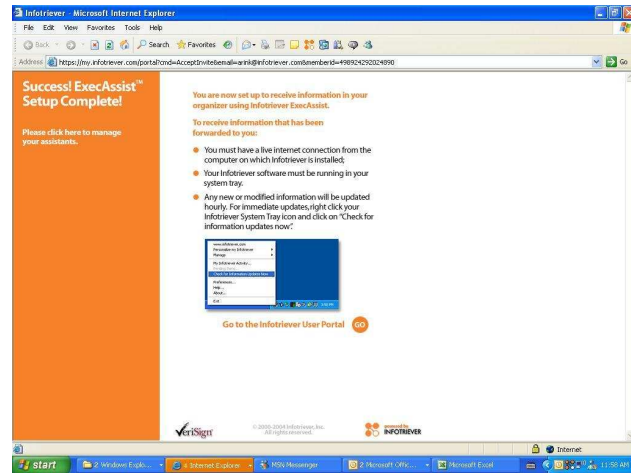


<sup>1</sup> For the purposes of Infotriever ExecAssist, the "Executive Assistant" is any Infotriever user who has been granted permission by an "Executive" to post information into his or her organizer through the Infotriever service (where the Executive may be an executive, boss, work colleague, friend,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

### 2. Successful Setup.

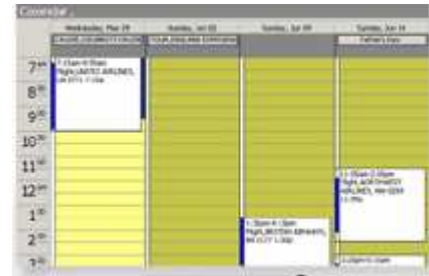
Once you have successfully set up ExecAssist, you will see the Success! ExecAssist™ Setup Complete! confirmation web page. You and your Executive Assistant can now start to use ExecAssist™.

**Note:** Once the setup is successful, your status on your Executive Assistant's panel will change to "Approved", and s/he will receive a confirmation email.



### 3. Receiving Information into your Organizer.

When your Executive Assistant has added information into your organizer, you will see a message that states that "Information was updated in your organizer."



You can check your organizer to see the information that was updated, or simply right click on the Infotriever icon on the bottom right of your screen and select My Infotriever Activity from the menu items to view your Activity Log and all of the details of the information that was downloaded into your organizer. You may also view My Infotriever Activity by simply left-clicking the Infotriever icon in your system tray.

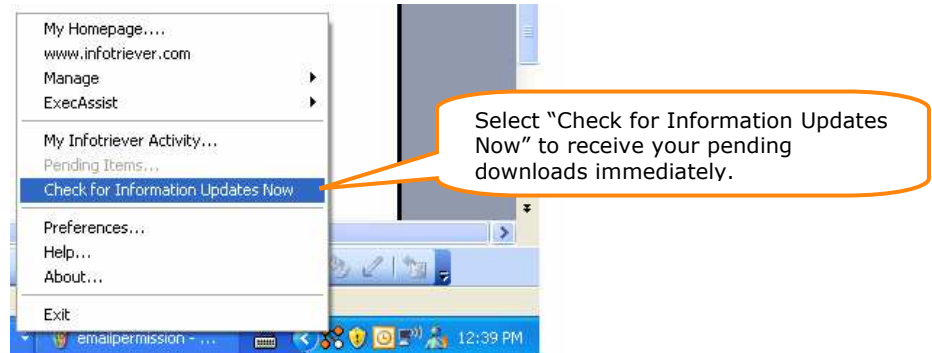
**1.** Right-click the Infotriever icon in your system tray.

**2.** Select My Infotriever Activity.

**3.** View the details of your recent Infotriever downloads.

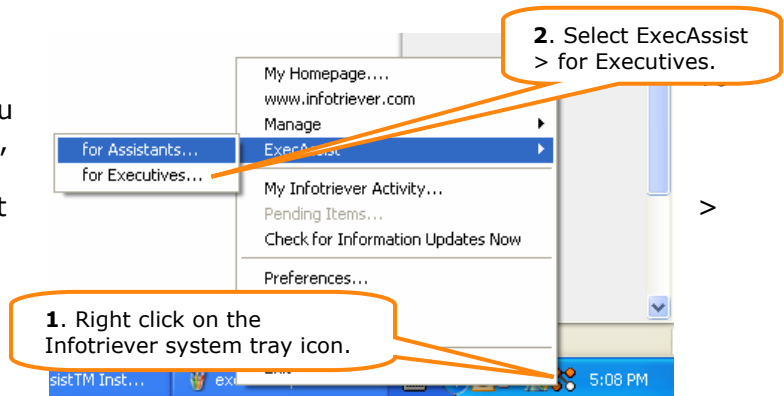
Item	Type	Date/Time Processed
trink	Signature	4/28/2005 2:41:26 PM
HRZB - Q4 2005 Horizon Financial Earning...	Calendar	4/28/2005 2:36:05 PM
HRZB - Q4 2005 Horizon Financial Earning...	Calendar	4/28/2005 2:30:04 PM
trink	Signature	4/28/2005 2:25:17 PM
trink	Signature	4/26/2005 5:11:46 PM
HOTEL, TREASURE BEACH HOTEL	Calendar	4/26/2005 12:01:06 PM
CRUISE, VIKING LINE 1:00pm	Calendar	4/26/2005 12:01:06 PM
CAR, HERTZ RENT A CAR LISBON, PO...	Calendar	4/26/2005 12:01:05 PM
Flight, BRITISH AIRWAYS, BA 0501 11:40...	Calendar	4/26/2005 12:01:05 PM
Flight, BRITISH AIRWAYS, BA 0069 4:30pm	Calendar	4/26/2005 12:01:05 PM
Flight, US AIRWAYS, US 1475 9:50am	Calendar	4/26/2005 12:01:04 PM

**Note:** When your Executive Assistant downloads information into your organizer, that information will appear within one hour of the time that the Executive Assistant completed the download. At any time, you may retrieve the information immediately through Infotriever by right clicking on the Infotriever icon in your system tray on the bottom right hand side of your screen, and selecting the "Check for Information Updates Now" menu item. This will direct Infotriever to immediately check to see if there is any information that is waiting to be downloaded into your organizer.



### Managing Your Executive Assistants.

access the Executive's Panel where you can manage your Executive Assistants, right-click on the Infotriever icon in your system tray and select ExecAssist for Executives.



There may come a time when you wish to revoke permission for your Executive Assistant to add information to your organizer. To revoke permission, simply click on the "Revoke Permission" button for the Executive Assistant, and s/he will no longer have the ability to download information into your organizer. If you wish to add that Executive Assistant to your list in future, simply ask that Executive Assistant to resend the Executive Assistant request to you (see Infotriever User Guide – ExecAssist for Executive Assistants and Travel Arrangers, #3-4).

