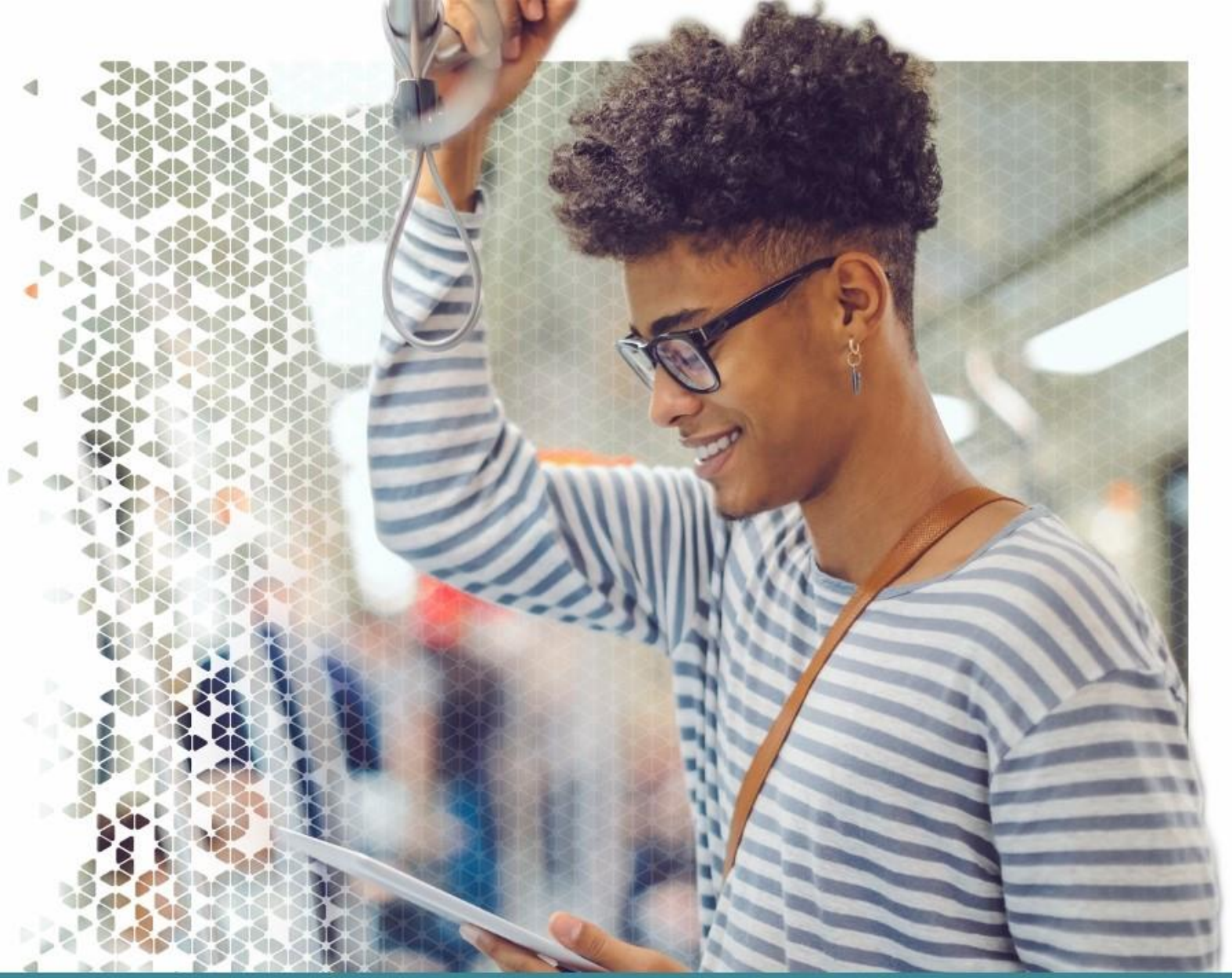
civica

Transforming the way you work



Modern.Gov iOS Tablet App: Walkthrough

Modern.Gov

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Introduction

The free Modern•Gov app automatically downloads meeting papers for your subscribed committees, supporting your organisation's commitment to reduce its reliance on paper. A wide range of annotation tools allows you to mark-up documents as easily as if they were on paper. The app complements your existing Modern•Gov website, intranet and/or extranet.

This easy-to-use app offers free access to publicly-available meeting papers from any organisation using Modern•Gov's decision management system to support its democratic, governance and transparency processes.

Organisations can also purchase additional restricted services to provide allowed users secure access to its internal or restricted meeting papers and to access the in-app voting features.

The app is available on iPads of any size (as long as the iPad's operating system, iOS, is supported by Apple[1]). It does not currently run on iPhones or MacBooks.

[1] iOS 11+ at the time of writing.

Glossary

Agenda Front Sheet	**Coming Soon:** The front cover of any agenda, available as a standalone document without any supporting papers. Particularly handy for those running the meeting so they can have the agenda cover in front of them at all times.
Agenda Pack	The full agenda, including the cover and all reports, available as one document.
Document	Catch-all term for all the files published to the app by an organisation, regardless of whether they are documents, spreadsheets, images, presentation slides or other file types.
Home Screen	The app's main menu – the first screen you see when it opens.
Long-Press	Instead of tapping quickly, lightly pressing and holding your finger or stylus on the screen.
Restricted	Anything which is not publicly available. This could refer to an organisation which uses the app for internal meetings but does not publish anything onto its public-facing website ('restricted organisation'). It could also be used in relation to documents from a public organisation which have access restricted to certain users in accordance with relevant legislation or rules (e.g., a report dealing with an employment matter). Access to restricted information must be enabled by the organisation providing it. If you have access to restricted organisations, committees and documents, they will appear in menus against a pink background to differentiate them from publicly-available information.
Starred	Documents you have marked as important to you by tapping a star icon.
Supplement	Additional papers to accompany the agenda, decisions or minutes, like an item of urgent business which has arisen after the agenda had been published.
Views	A menu on the left-hand side of the app's home screen which helps you quickly find the documents you want.

What's New

The original app launched nearly a decade ago. Since then, we've kept it updated regularly and listened to feedback from our customers to add improvements, and the time has now come to launch a brand new version. If you have the older version on your device, don't worry: both can be run simultaneously for the time being – the original version won't be discontinued immediately.

Why switch? Here's what the new app offers:

	Original App	New iOS App
Automatic download of agendas, reports, decisions and minutes, supplementary meeting papers and Library documents	✓	✓
Document library for non-meeting information	✓	✓
Document library appears as a distinct menu item, rather than in the list of committee names		✓
Automatic download of agenda front sheet as a separate document		
Open multiple documents at the same time and from different meetings (and from the document Library) – a maximum of 10 documents may be open at any time		✓
Quickly find documents from: What's New / Recently Published, Annotated, or browse by committee name	✓	✓
Quickly find documents from above options and from: Upcoming, Recently Opened, Unread or Starred		✓
In-app calendar to browse meetings by date		✓

	Original App	New iOS App
Toggle between all meetings / just meetings with documents		✓
Tap to expand / collapse list of documents available for a meeting		✓
User-defined default settings to expand all / collapse all lists of documents available for a meeting		✓
Long-press meeting name to open all available documents at once		✓
Document navigation using page forward / page back buttons	✓	
Document navigation using ‘Jump to Page Number’ button	✓	
Document navigation using thumbnail images to jump forwards, backwards or to any page		✓
Document navigation using bookmarks created by the user		✓
Advanced document navigation tools using bookmarks and free text search within a document	✓	✓
Advanced document navigation using annotations as bookmarks.	✓	✓

	Original App	New iOS App
Open other documents from this meeting without returning to main menu		✓
Annotation tools – scribble, underline or highlight text, add sticky noes	✓	✓
Advanced annotation tools including text strikethrough, adding call-outs, stamps, signatures and images, and options to select, copy and paste annotations and signatures.		✓
Remember last-used annotation settings.		✓
Remember last-viewed page when re-opening document.		✓
Pinch-to-zoom document view	✓	✓
Lock document width to fit screen	✓	✓
Lock document height to fit screen		✓
Automatic document zoom to best fit screen rotation		✓
User-defined in-document scrolling preferences: horizontal or vertical		✓

	Original App	New iOS App
User-defined in-document page transition preferences: see one page at a time, see continuous pages, see page turn animation		✓
User-defined in-document appearance preferences: default, sepia or night mode		✓
User-defined in-document screen brightness control		✓
Share original document – whole document, page range or single page (public documents only)	✓	✓
Share document with annotations – whole document, page range or single page (public documents only)		✓
Select text to be read aloud to you		✓
Open / save document in another app on your device	✓	✓
Delete document from device	✓	✓
Two-factor security	✓	✓
ADFS integration to reduce the need for multiple passwords		✓

	Original App	New iOS App
Subscribe to multiple publishers	✓	✓
Searchable document publisher list		✓
Subscribe to multiple committees	✓	✓
Searchable committee list		✓
Pin / Star important documents for easy identification and retention	✓	✓
Automatically delete documents from device at end of user-defined default document retention period.	✓ Up to 6 months	✓ Up to 5 years
Remote lock / wipe of device	✓	✓
Welsh Language		✓
In-app Voting (restricted app only; chargeable feature)		✓

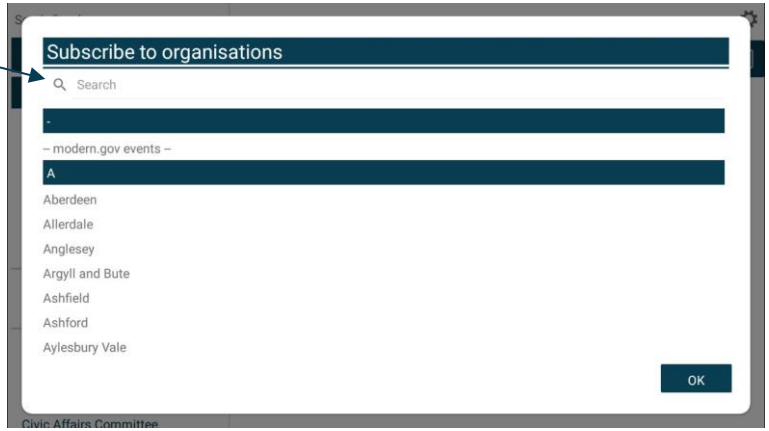
Getting Started

Search for “Modern•Gov” on the App Store and download the free app.

The Modern•Gov app appears on your home screen. Tap the icon to open the app:

Select at least one organisation to follow. **Swipe down** on the screen to refresh the list at any time.

Tip: use the **search bar** at the top:

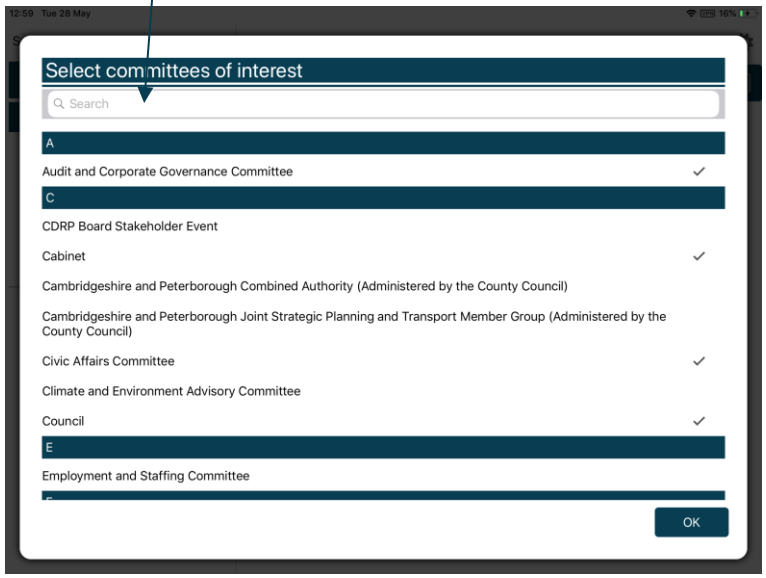


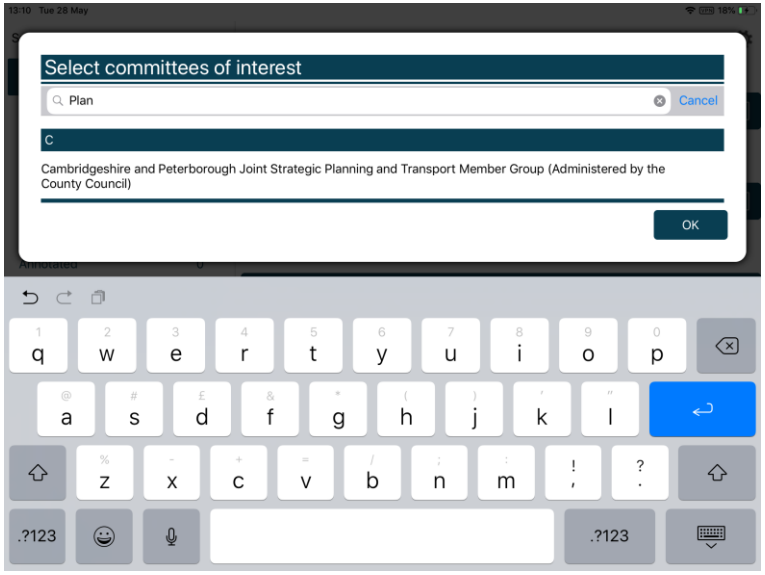
Tap an organisation name to select it.

Tap OK to confirm your selection(s). Subscriptions can be changed at any time from **The Settings Menu**.

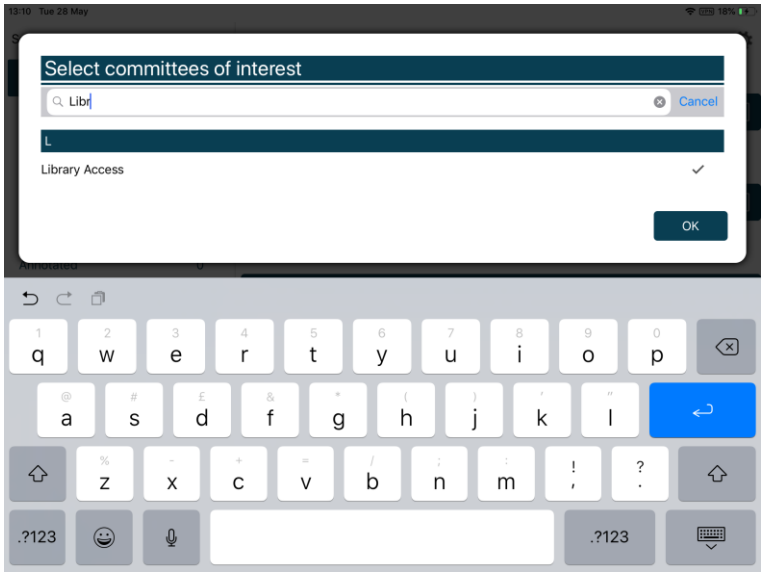
The organisation's list of committees will appear. Select committees to follow. **Swipe down** on the screen to refresh the list at any time.

Tip: use the **search bar** at the top:





Your organisation might also have a document library[2] for other available information. You can find this in the committee list:



[2] Organisations choose their own name for this document storage feature; most use a variation on 'library'. If you cannot find it, please ask the organisation if they provide one and, if so, what they call it.

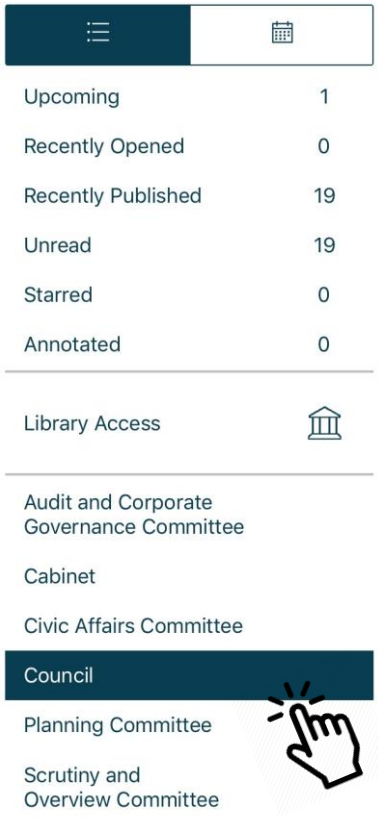
The Home Screen (Main Menu)

The app opens in its home screen:

Documents begin downloading automatically for your subscribed committees:

Restricted version of the app only:

Find documents easily by **tapping** on the options on the left-hand side:



Toggle between document view and calendar view

Upcoming meetings, with or without documents (there will be some overlap with results from Recently published documents)

Recently opened documents (10 most recent meeting documents and 10 most recent Library items)

Recently published documents (there will be some overlap with results from Upcoming meetings)

Unread documents – downloaded but not yet opened (excluding Library items)

Starred – documents you have marked as important to you appear in this list automatically (including Library items)

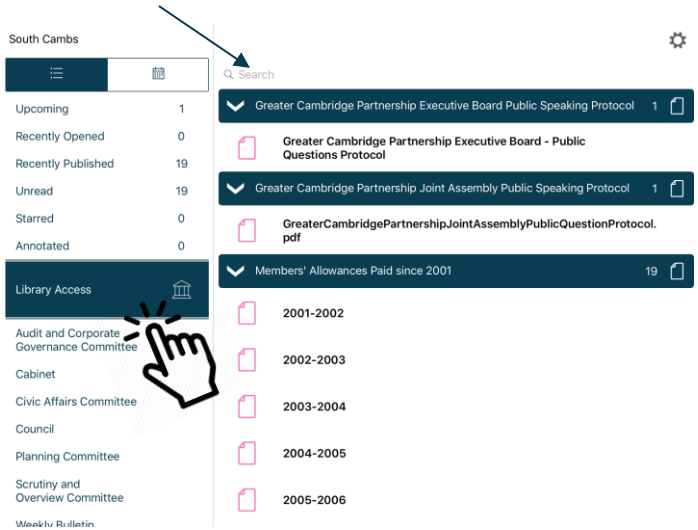
Annotated – documents you have annotated appear in this list automatically (including Library items)

Library of other (non-meeting) documents published by this organisation.

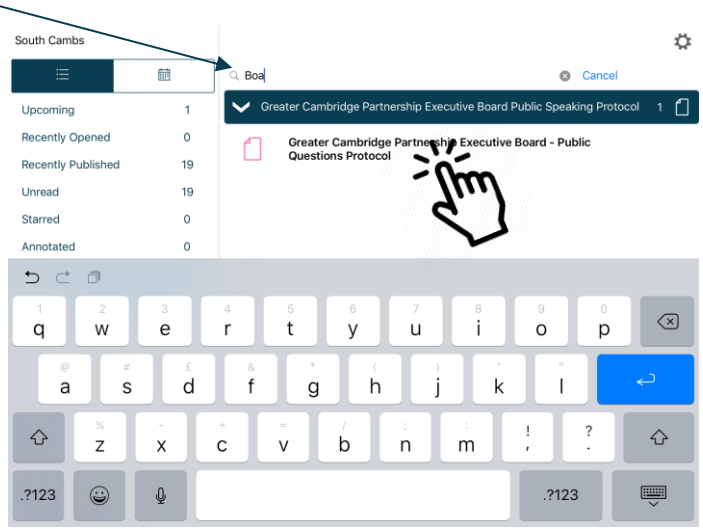
Subscribed committees listed alphabetically. **Tap** a committee name to see documents only for that body.

Tap on the library to see what other information has been made available by your organisation.

A **document title search** is available.



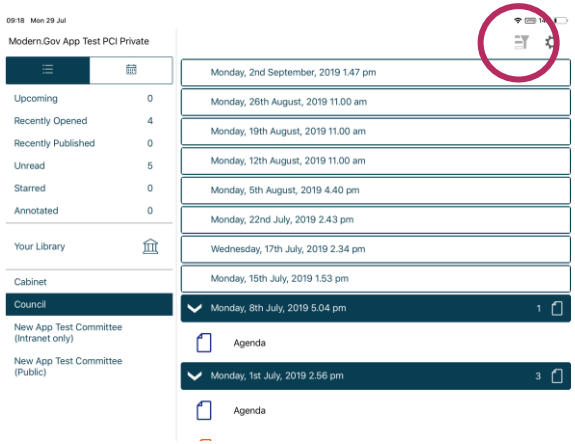
Type to search the **titles** of all Library items.



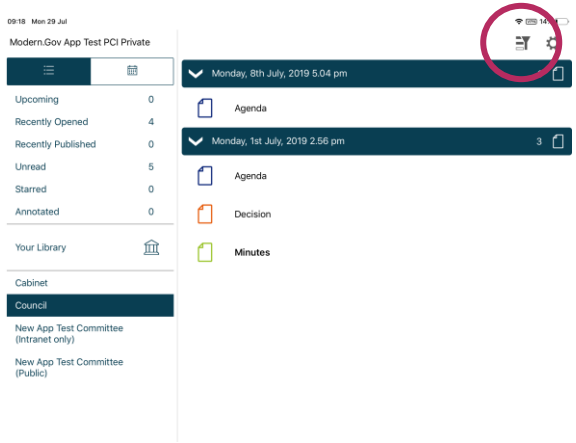
Library items are not automatically downloaded. **Tap** a Library item **title** to start downloading.

Coming Soon: Use the Filter (at the top right) to show all meetings or only those with available documents:

Filter **off** – shows all meetings



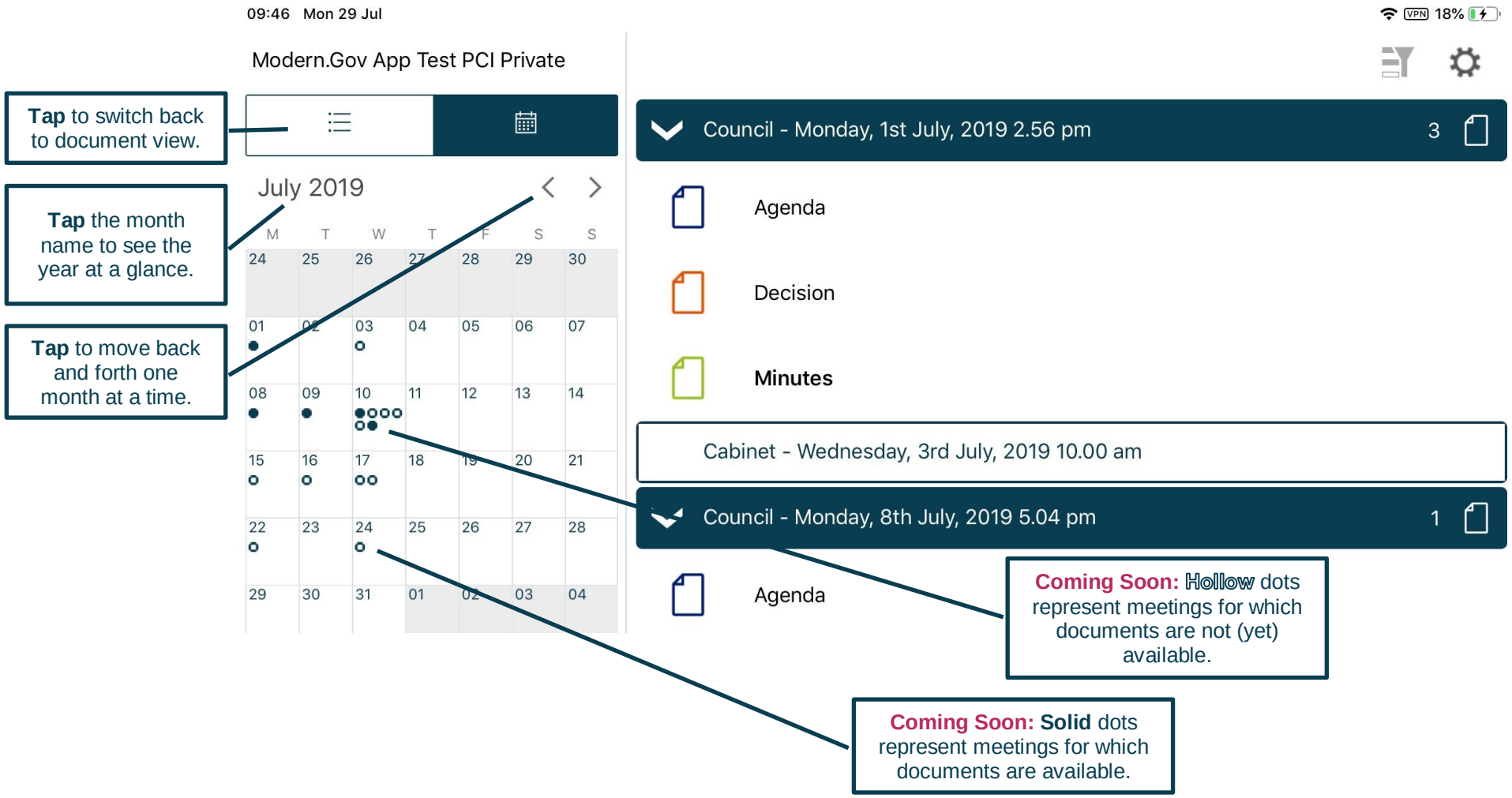
Filter **on** – shows only meetings with documents



Meetings for which documents have not yet been published, or where no documents are available, are represented by a **hollow** meeting details bar.

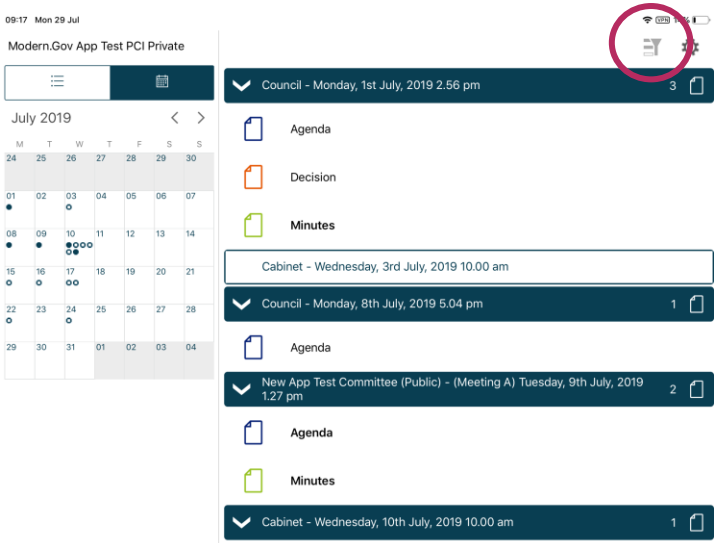
Meetings for which documents have been published are represented by a **solid** meeting details bar.

Use the calendar to browse by date. **Tap** a date to see meetings on that date:

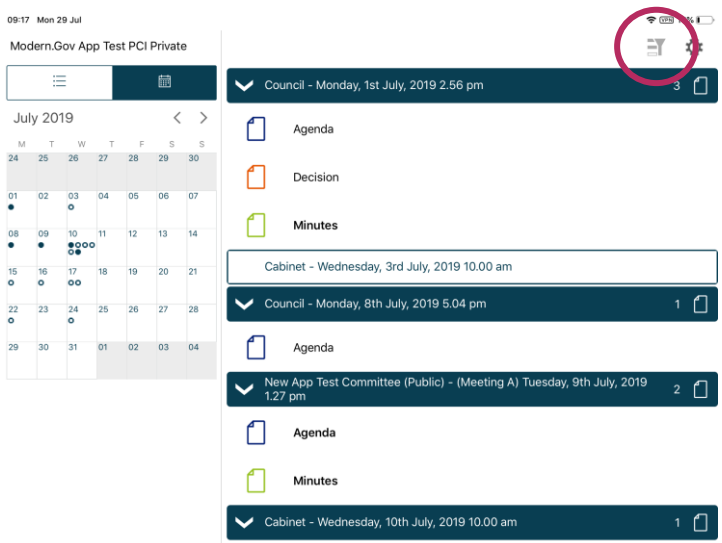


Coming Soon: Use the Filter (at the top right) to show all meetings or only those with available documents:

Filter **off** – shows all meetings



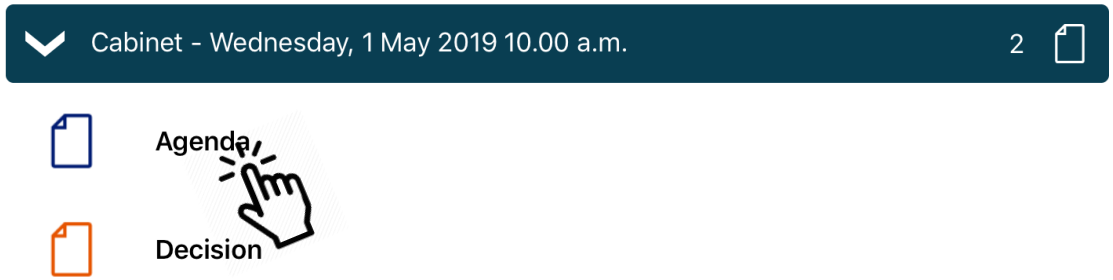
Filter **on** – shows only meetings with documents



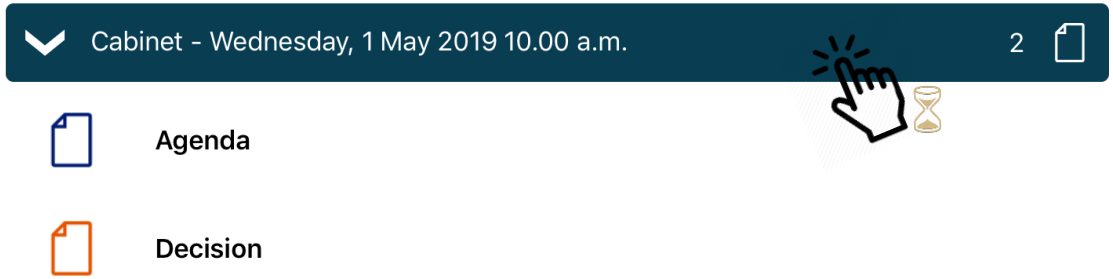
Meetings for which documents have not yet been published, or where no documents are available, are represented by a **hollow** dot in the calendar and a **hollow** meeting details bar.

Meetings for which documents have been published are represented by a **solid** dot in the calendar and a **solid** meeting details bar.

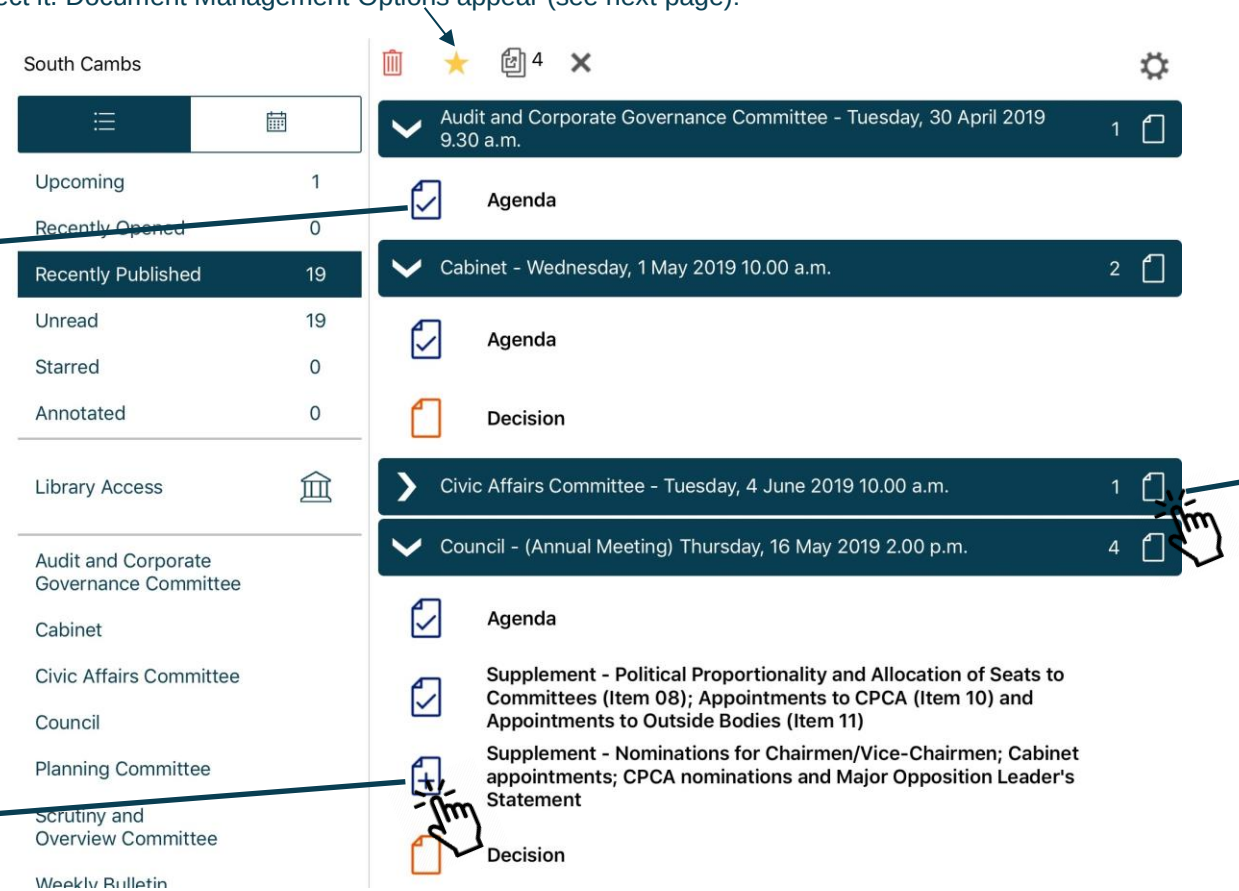
Tap a document **name** to open it on its own…



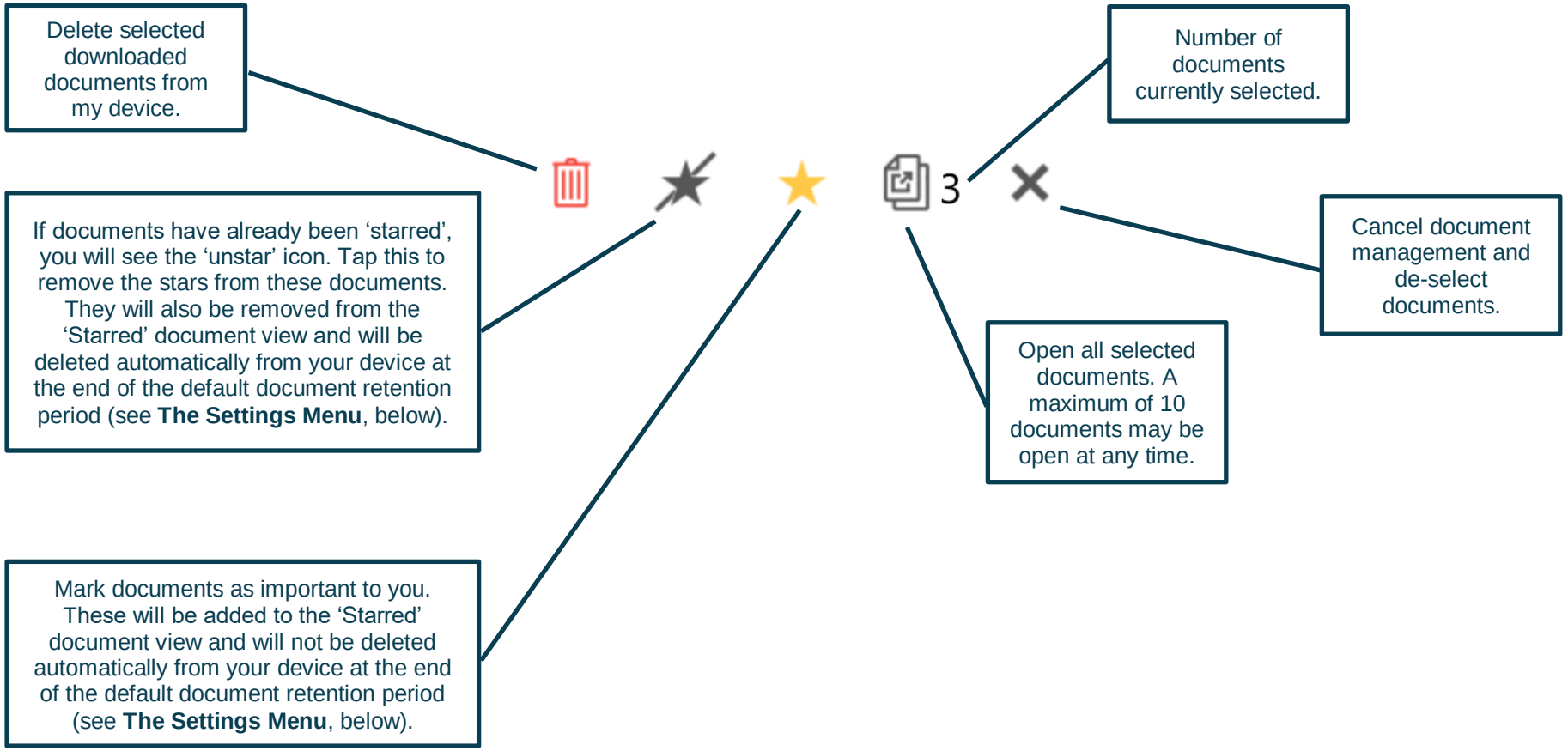
…or **press and hold** on the **meeting details bar** to open all the documents for that meeting:



Tap a document **icon** to select it. Document Management Options appear (see next page):



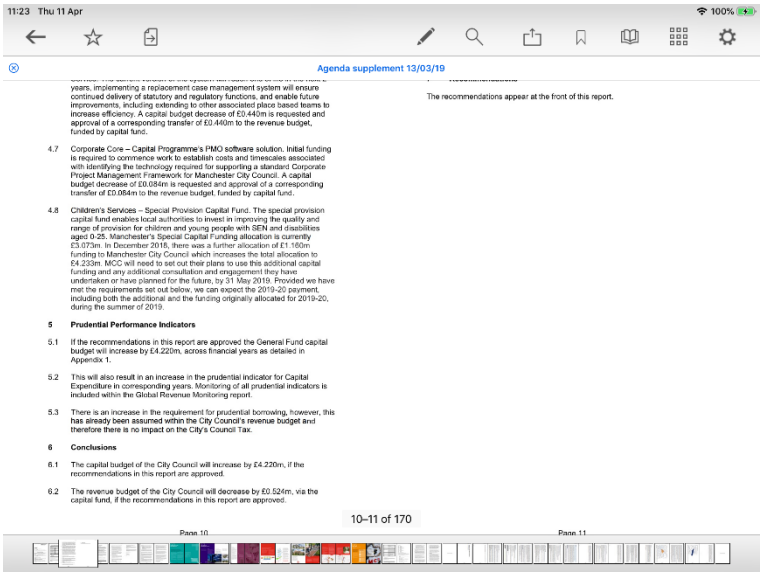
Document Management Options



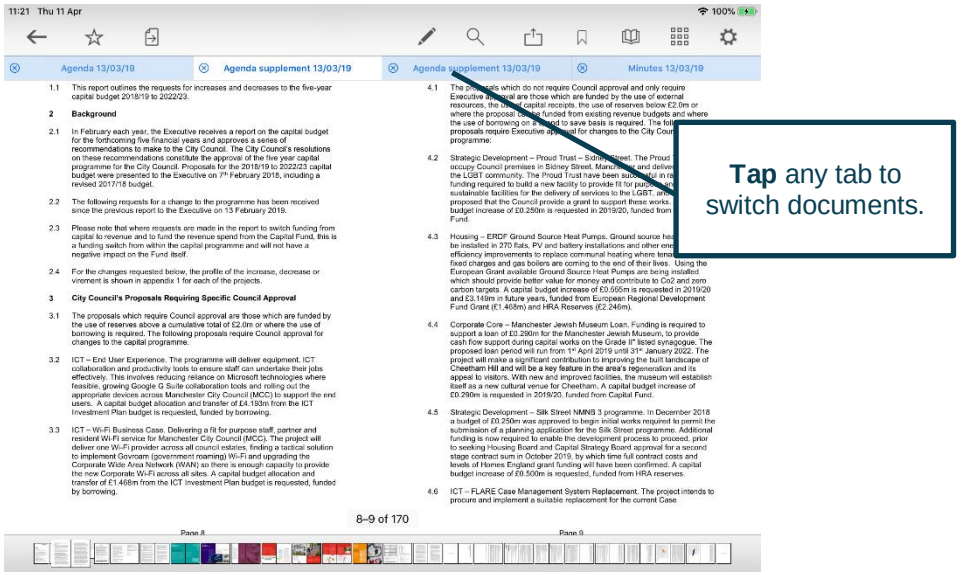
Viewing and Annotating Documents

The document viewer screen:

With one open document (landscape):

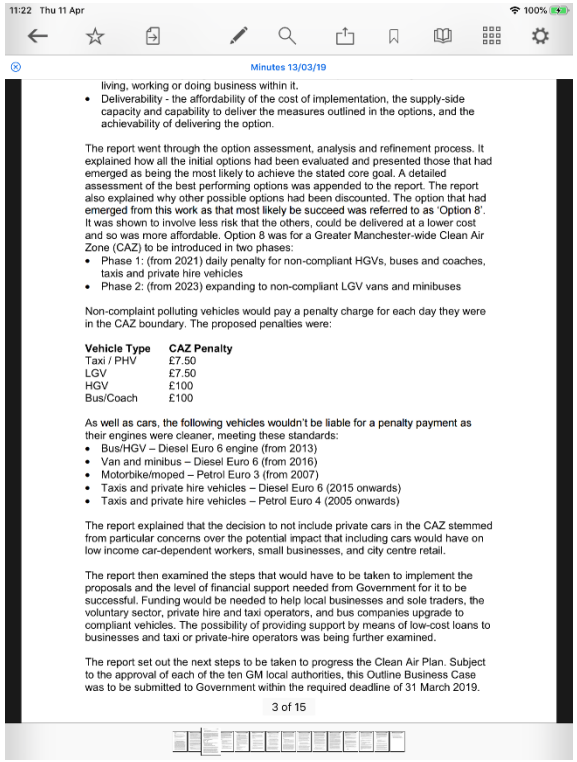


With multiple open documents (landscape) – a maximum of 10 documents may be open at any time:

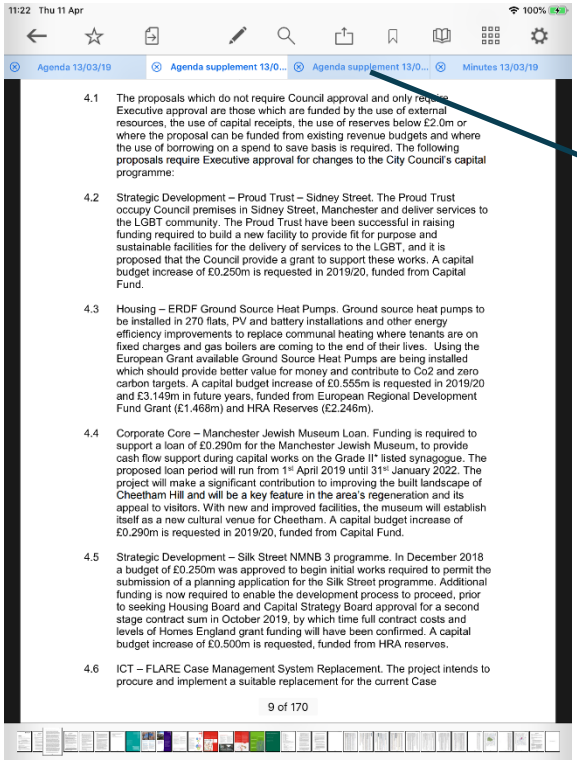


Tap anywhere on the document to hide the toolbars. **Tap** again to make them re-appear.

With one open document (portrait):



With multiple open documents (portrait) – a maximum of 10 documents may be open at any time:

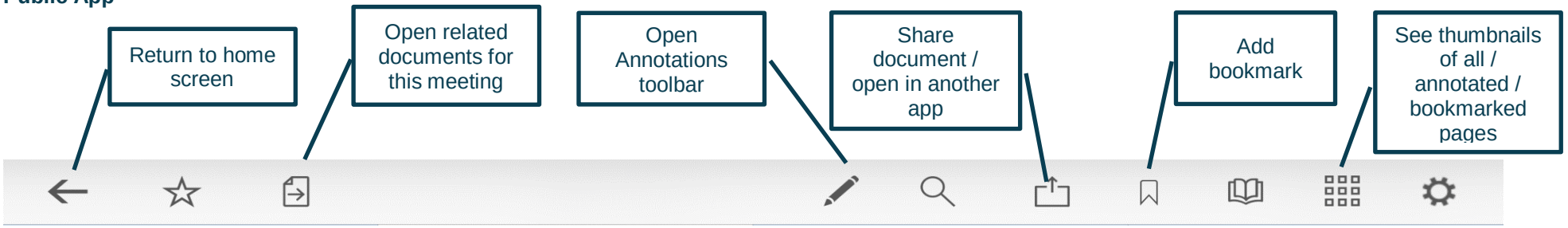


Tap any tab to switch documents.

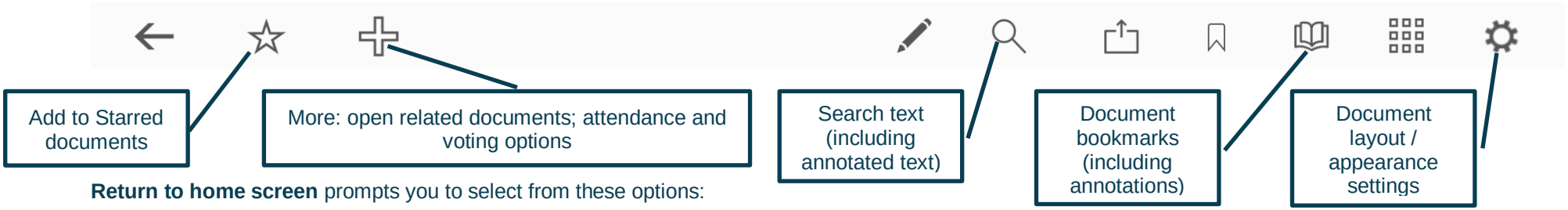
Tap anywhere on the document to hide the toolbars. **Tap** again to make them re-appear.

Document Viewer: Toolbar Icons

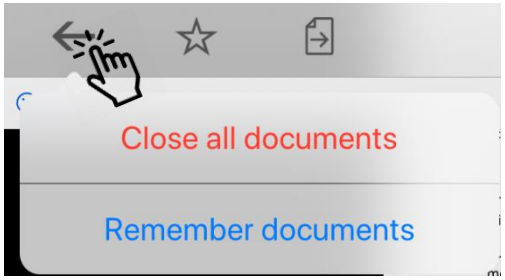
Public App



Restricted App



Return to home screen prompts you to select from these options:



Keeps documents open **and** remembers your last location

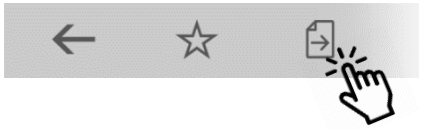
Add to Starred documents:

This document will now appear in the ‘Starred’ document view on the home screen (main menu).

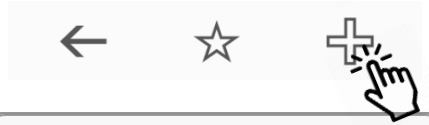
Open related documents

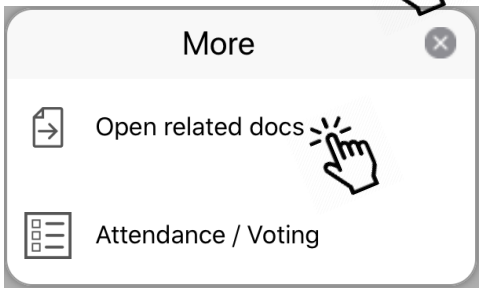
Tap to open related documents for this meeting:

Tap and…
(Public App)

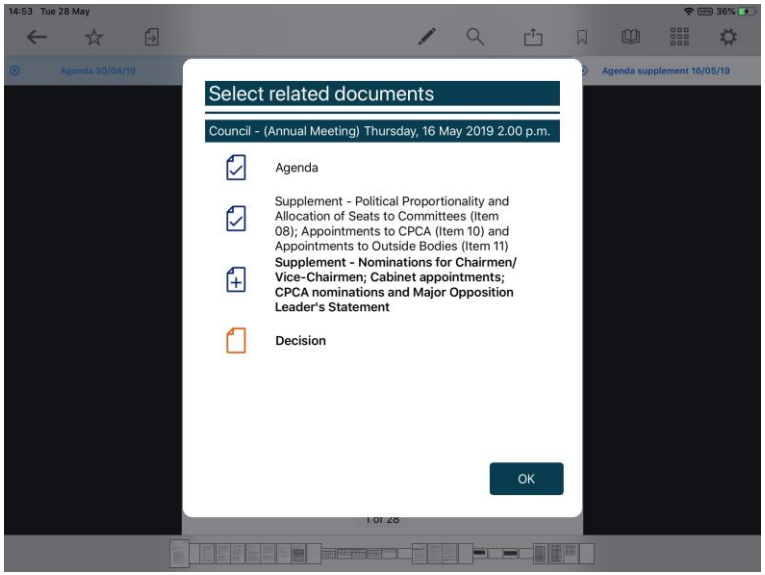


(Restricted App)

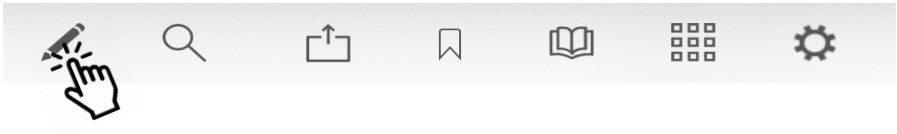




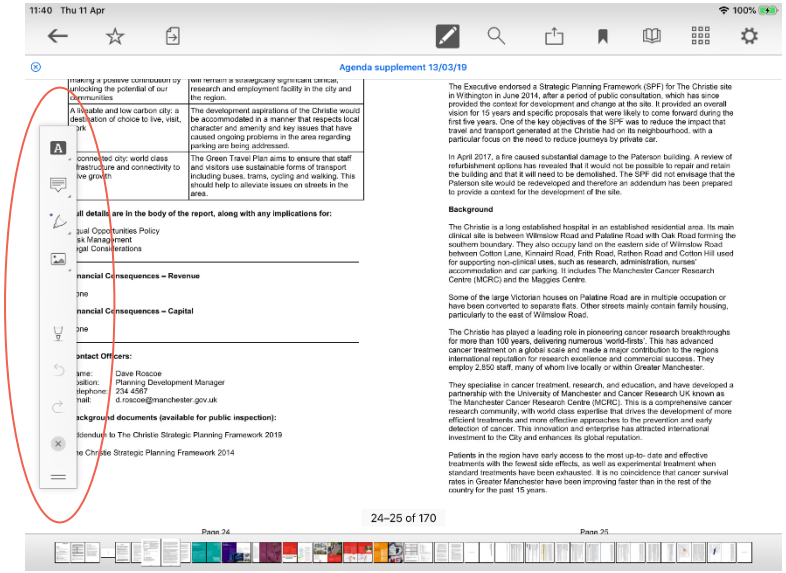
…select one or more other documents for this meeting and **tap** OK:



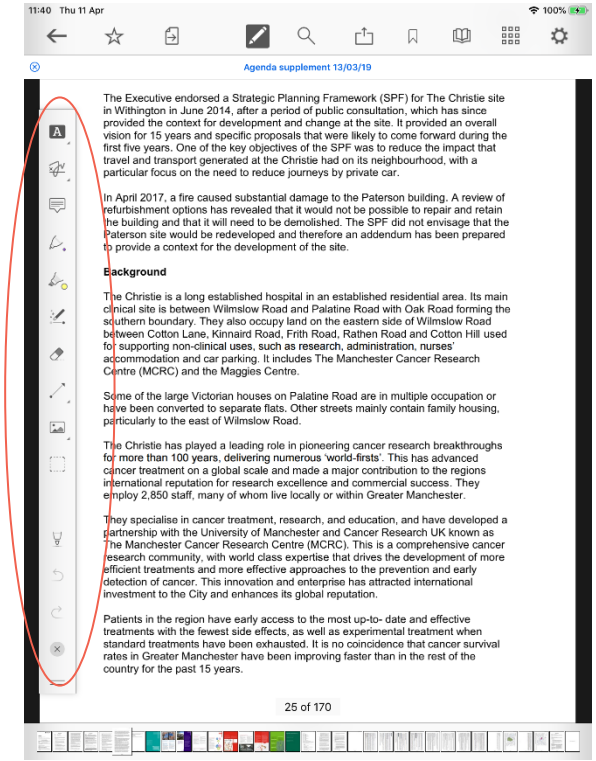
The Annotations Toolbar



Landscape view (some options available only from sub-menus):



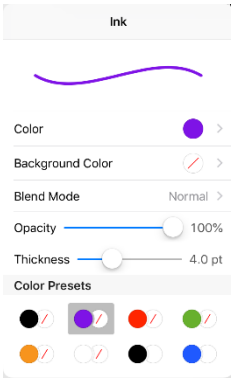
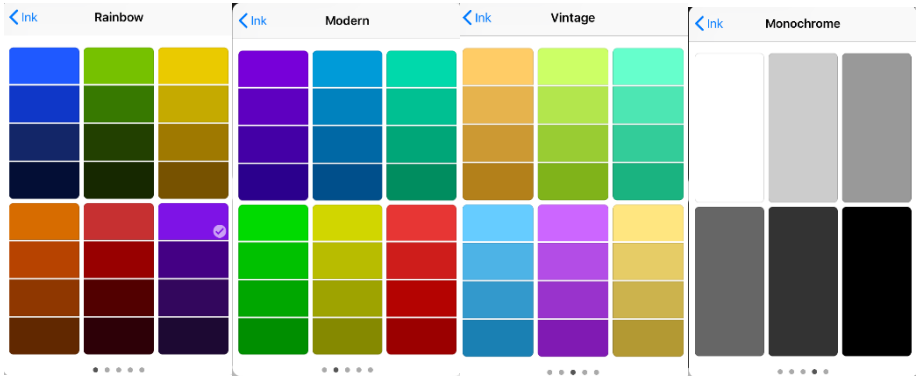
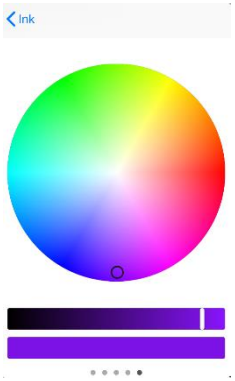
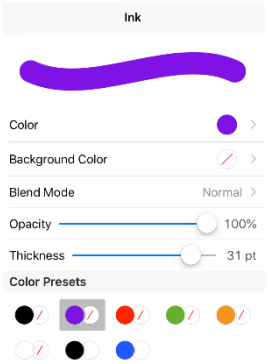
Portrait view (more options immediately accessible from menu):



What does it do?	Landscape Menu Icon	Portrait Menu Icon	Press and hold the icon to expand the menu and show:			
Mark-up text			Highlight text	Underline text	Squiggly underline text	~~Strikethrough text~~
Insert text, comments	(Note: the Add Sticky Note tool will appear here in Landscape Mode after you begin annotating)		Insert text box, **add searchable text**	Insert call-out box, **add searchable text**	Draw and insert a signature	
Add sticky notes **with searchable text**			(no expansion required. Note: if your device is in Landscape Mode, this menu will combine with the above Insert Text, Comments icon when you begin using annotation tools)			
Scribbles and shapes			Freehand scribble – with pen	Freehand scribble – with highlighter	Smart draw – makes freehand lines straight and freehand circles round	Insert arrow	Insert line	Insert rectangle	Insert circle / oval	Insert polygon	Insert jointed line segment	Erase annotation
			(Freehand scribble – with pen; no expansion required)								

<table>
<tr><th>What does it do?</th><th>Landscape Menu Icon</th><th>Portrait Menu Icon</th><th colspan="6">Press and hold the icon to expand the menu and show:</th></tr>
<tr><td rowspan="3"></td><td rowspan="3"></td><td></td><td colspan="6">(Freehand scribble – with highlighter; no expansion required)</td></tr>
<tr><td></td><td colspan="6">(Smart draw – makes freehand lines straight and freehand circles round; no expansion required)</td></tr>
<tr><td></td><td>Insert arrow</td><td>Insert line</td><td>Insert rectangle</td><td>Insert circle / oval</td><td>Insert polygon</td><td>Insert jointed line segment</td></tr>
<tr><td>Erase annotation</td><td>(found in scribbles & shapes menu)</td><td></td><td colspan="6">(no expansion required)</td></tr>
<tr><td>Insert objects</td><td></td><td></td><td>Insert photo from your device (app will ask you to grant permission to access your photos)</td><td>Insert preset stamp (‘Draft’, ‘Sign Here’) or create your own</td><td>Clipboard: Insert saved annotation / Paste copied annotation</td><td>Record audio (app will ask you to grant permission to access your microphone)</td><td>Select existing annotations (landscape menu only)

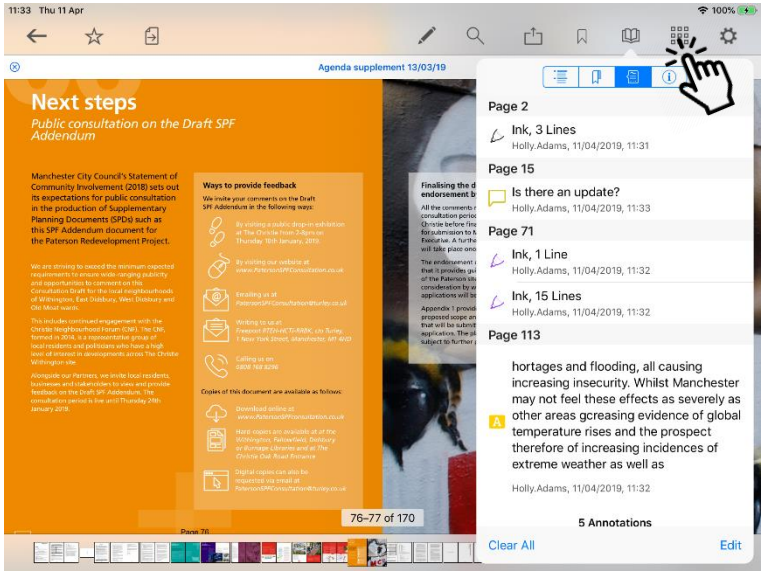
(top-level portrait menu item)</td></tr>
<tr><td>Select annotations</td><td>(found in insert objects menu)</td><td></td><td colspan="6">(Select existing annotations – no expansion required. Available options:
▶ Inspector – change colour, font, line thickness, etc. – these options depend upon annotation type
▶ Edit
▶ Copy – copied annotations can be pasted to the clipboard in the Insert Objects menu
▶ Delete)</td></tr>
</table>

What does it do?	Landscape Menu Icon	Portrait Menu Icon	Press and hold the icon to expand the menu and show:
Customise ink settings – colour, thickness, etc.			 Tap on Colour and select from one of the pre-set palettes (leave the Background Colour as it is – transparent – unless you intend to obscure the original text!):  (Swipe to change palettes) Or keep swiping through the palettes and define a custom colour:  Drag the slider bar in the menu to change the ink thickness: 
Stylus			(no expansion required – *this icon will appear only if you have a Bluetooth-enabled stylus connected to your tablet – tapping this simply lets you switch stylus if you have more than one connected*)

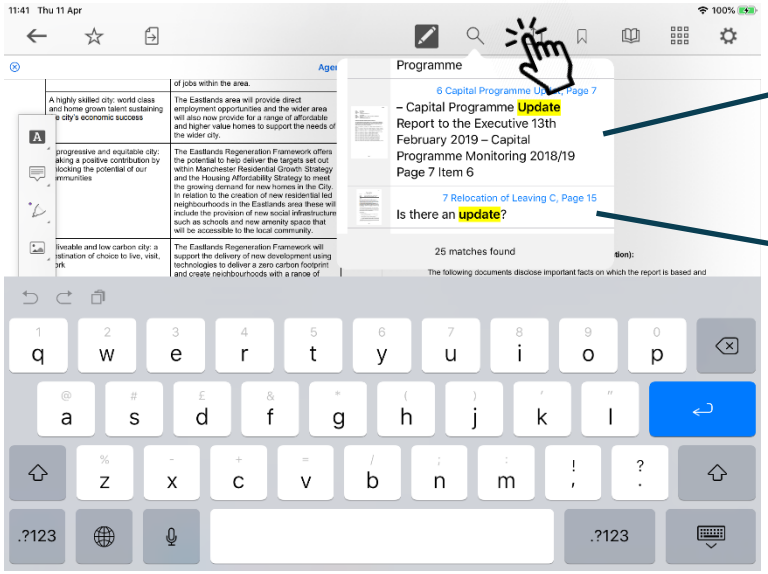
What does it do?	Landscape Menu Icon	Portrait Menu Icon	Press and hold the icon to expand the menu and show:
Undo and redo			(no expansion required)
Move the annotation toolbar			(Press and hold this icon to drag the annotation toolbar elsewhere on the screen. Drag it to the top of the screen to replace the default toolbar; no expansion required)
Close the annotation toolbar			(no expansion required)

It's easy to find all your annotations:

Each annotation becomes a new bookmark (see **Bookmarks: Adding and Navigating**, below)



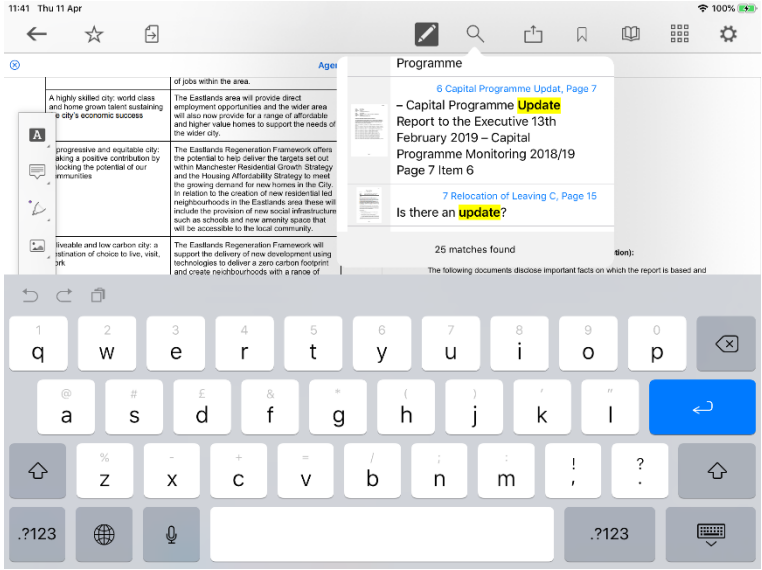
Text annotations appear in search results (see **Searching within the document**, below)



…and to access all your annotated documents from the main menu:

Searching within the document

Search results will also pick up any typed notes you have added as annotations.

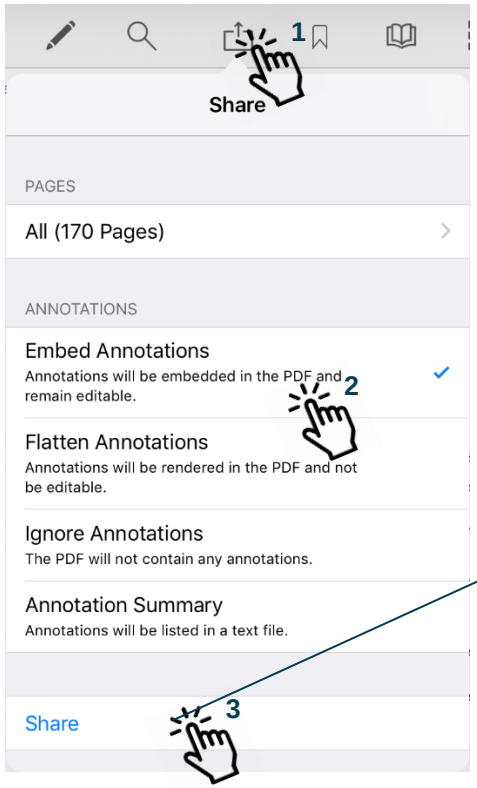


Tap on a result to jump straight to that page.

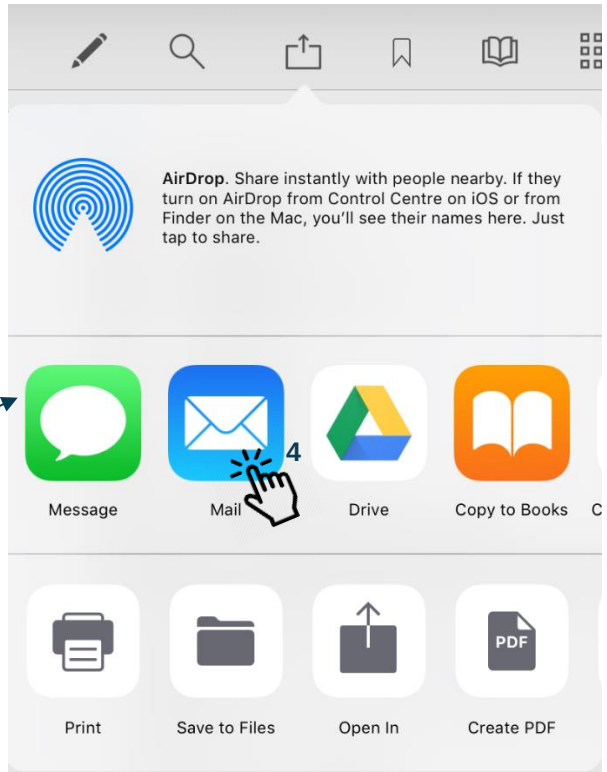
Sharing and exporting

Share **public** documents or open them in another app, with or without annotations:

First, **tap** the Share icon (1) and select **what** you would like to share (2): the whole document or just certain pages, with or without annotations. Then **tap** Share (3) and choose **how** to share it (4).



The **Share / Open In…** options you will find for sharing or opening the document in another app will depend upon which other apps you have installed on your device:

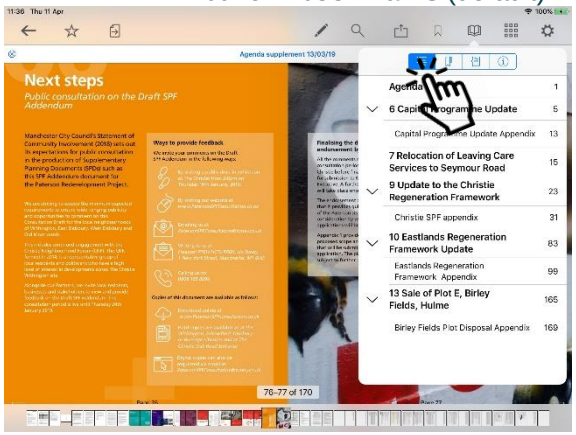


Bookmarks: Adding and Navigating

Tap the Add Bookmark icon at any time to add your own bookmarks to the document.

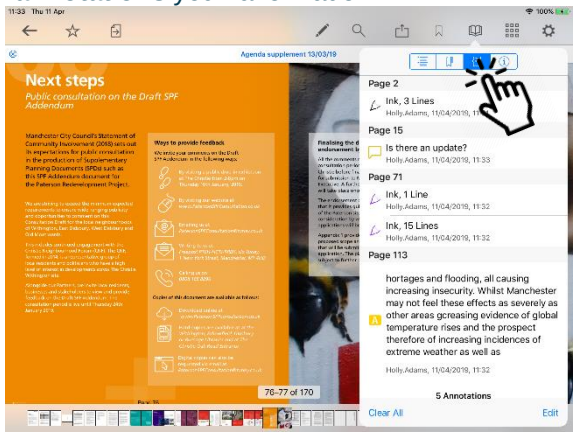
Tap the Bookmark menu to access all bookmarks in the document, then **tap the buttons** to navigate to a particular place in the document using…

…the document's **built-in bookmarks** (default):



…**bookmarks you have added**:

…**annotations** you have made:

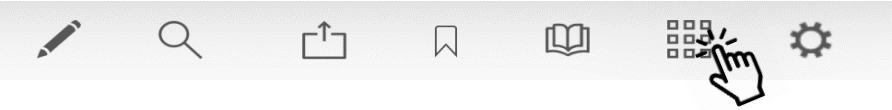


Tap the bookmark or annotation bookmark and jump straight to that place in the document.

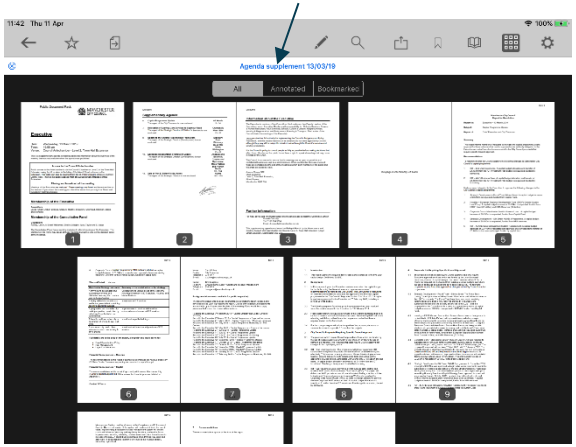
(The fourth button, ⓘ, displays document information – title, date created, etc.)

Thumbnails

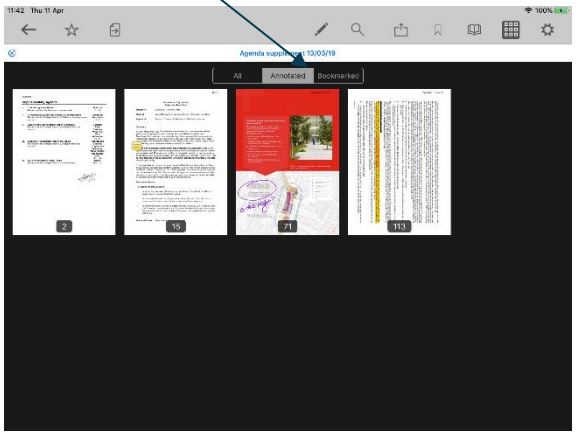
Move quickly around the document using thumbnail images:



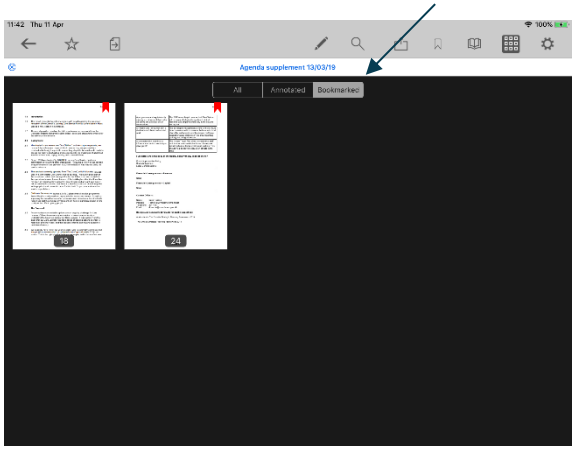
Toggle between seeing **all** pages…



…just the **annotated** pages…

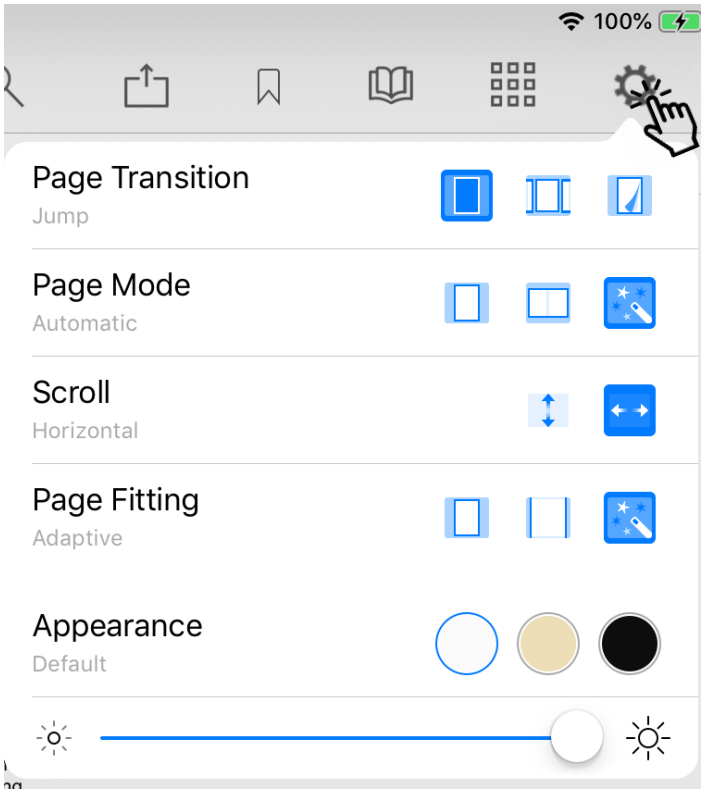


…or the pages **you have bookmarked**.



Appearance and Scrolling

Change your document appearance and scrolling options:



Select how it looks as you move from page to page: jump (see one page at a time), scroll continuously through the document, curl (animated page turns).

How many pages do you want to see on screen? Single, double or adaptive (the software will choose what it thinks is the best layout).

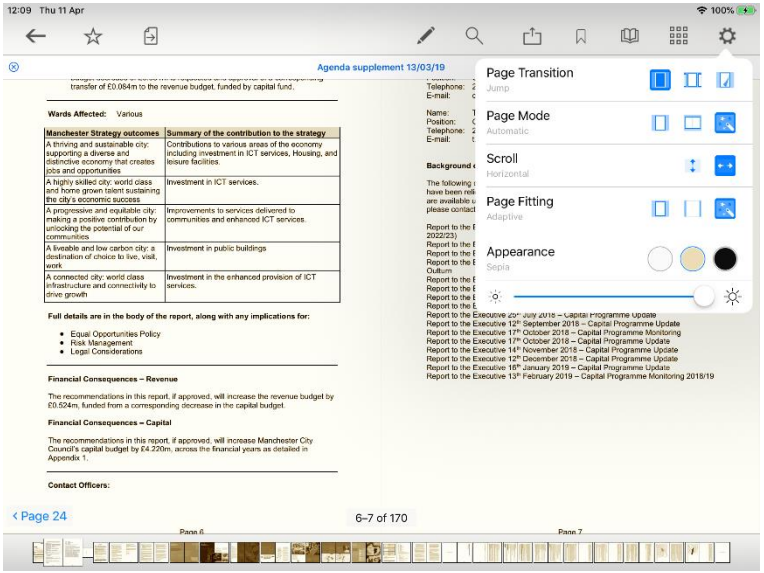
Scroll options: scroll vertically or horizontally through the document.

How should the page fit on your screen: show full height, show full width, or adaptive (the software will choose what it thinks is the best layout)?

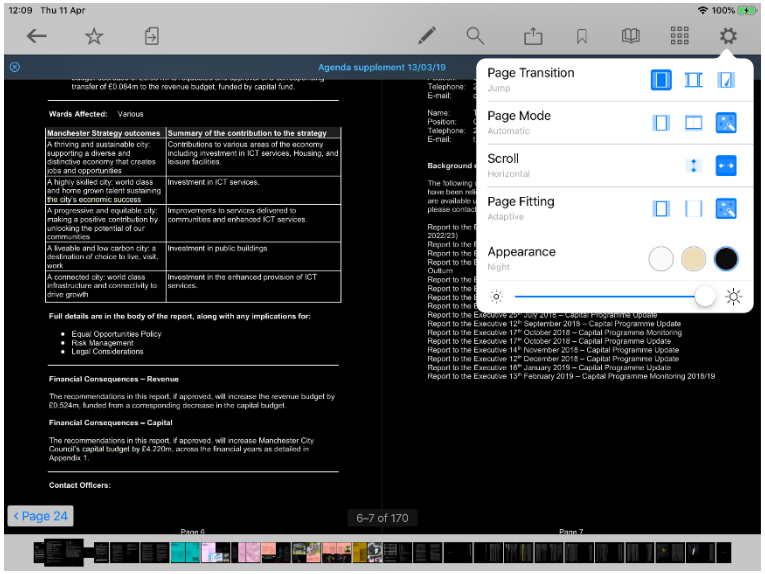
Appearance: default (as published), sepia or night mode – see below.

Screen brightness control (for this app only).

Sepia

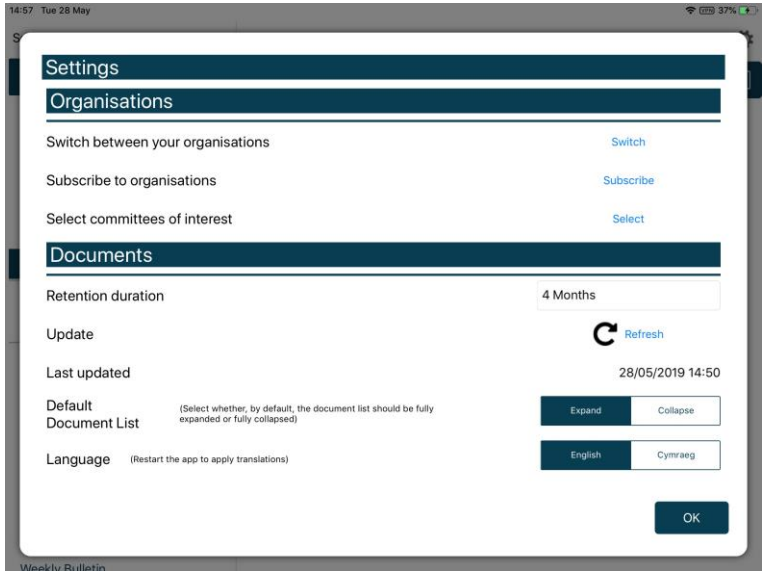


Night mode



The Settings Menu

To access, **tap** the Settings icon at the top right of the home screen (main menu): ⚙



Switch between subscribed organisations (if you have subscribed to more than one).

Subscribe to other organisations (or unsubscribe from organisations).

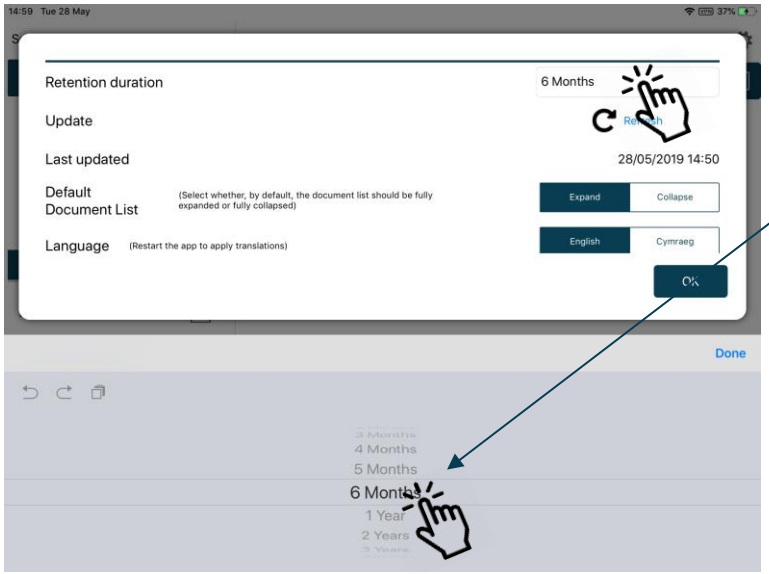
Select committees to follow (or to stop following)

Change how long documents will be stored on your device (see below).
Manual refresh – **tap** to check for new documents. **Long-press** for a full refresh of the whole app.
Last updated time and date.

Default document display preference: expand or collapse all sections.

Choose either English or Welsh as the app's default language (further information available in **Welsh Language Version**, below).

Retention duration setting:

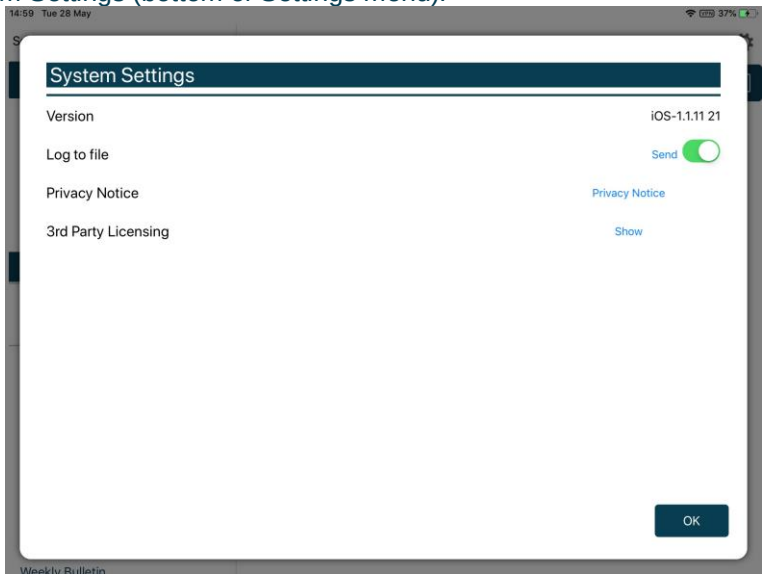


Downloaded documents are automatically removed from your device at the expiration of the retention period.

To adjust this setting, **tap** the duration period and then choose how long from 1 month to 5 years using the options at the bottom of the screen.

Starred documents are exempt from automatic deletion.

System Settings (bottom of Settings menu):



App Version number

Log usage information / send log file to developers

Privacy Notice

3rd Party Licensing – details of all third party software used in this app

Restricted App Registration Process

If your organisation has purchased the restricted version of the app, it will be able to make internal or confidential documents available to certain users. (If you haven't done so already, install the Modern•Gov app as explained above in **Getting Started**.) **We recommend that you close the app before proceeding with registration.**

Due to the requirement of the app being able to read restricted documents while being offline, there is a possibility that access to the restricted document could be gained from a stolen device. To do so would not be trivial and precautions are in place to mitigate this risk; however, we strongly recommend a Mobile Device Management (MDM) system is used in conjunction with app's own security to reduce the risk further.

Your organisation will contact you directly with your logon details, and, if in use at your organisation, information on its MDM system.

You will receive an email inviting you to:

Register this device

Now, open the email on the device with the Modern•Gov app installed and **tap the link** in the email.

You will be directed to a website and invited to choose between the new Modern•Gov app (this one) and the legacy version released several years ago; please select the **New App**.

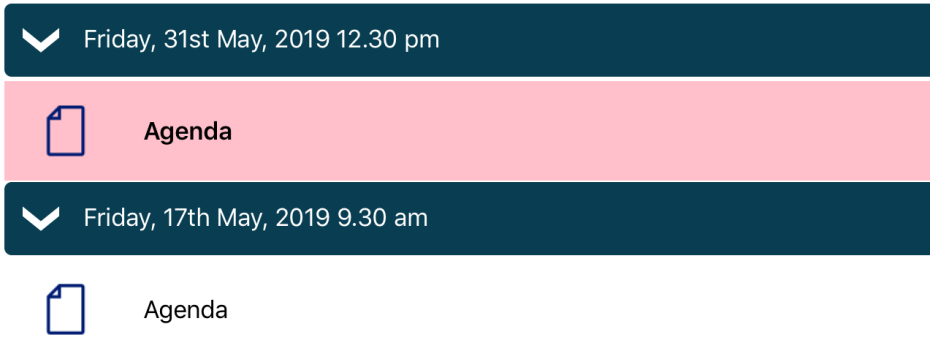
You will be asked to **confirm** that you want to open the Modern•Gov app – tap **Open**.

The app will open and invite you to complete the registration process with the logon details provided by your organisation:

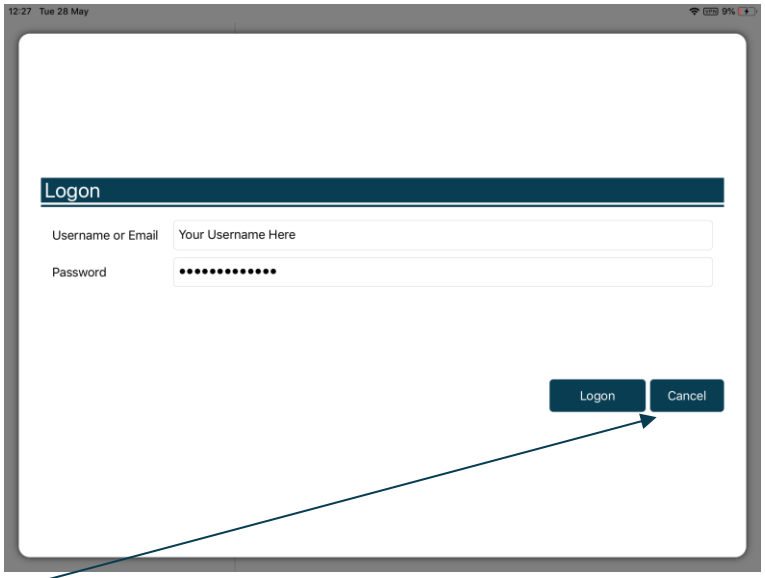
You will then be registered to open, read and annotate documents with restricted access. You will not be able to share restricted documents, nor will you be able to open them in other apps. In-app voting will also be enabled if your organisation has purchased this feature.

Which documents you see will depend upon the access permissions granted by your organisation.

Documents with restricted access appear in menus with a pink background (the documents themselves are not pink):

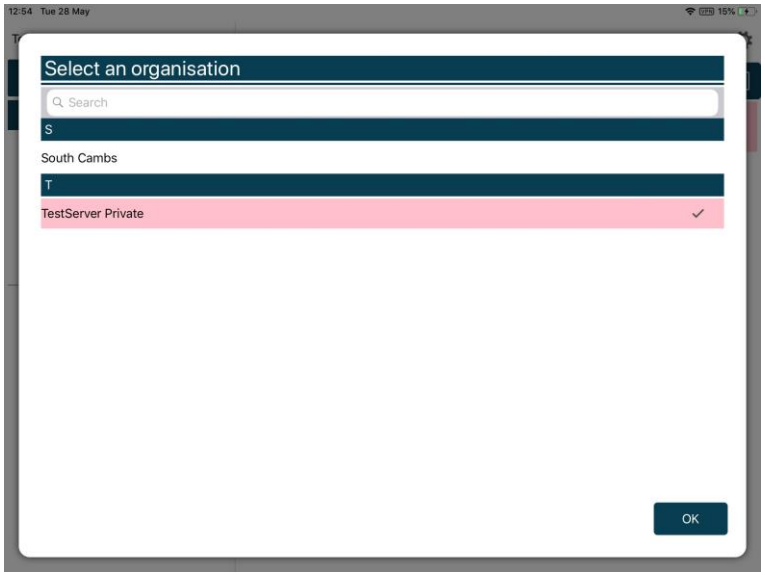


When you next open the Modern•Gov app you will be prompted to login:



(If you select **Cancel**, you can still use the app, but will have access only to publicly-available documents from public organisations.)

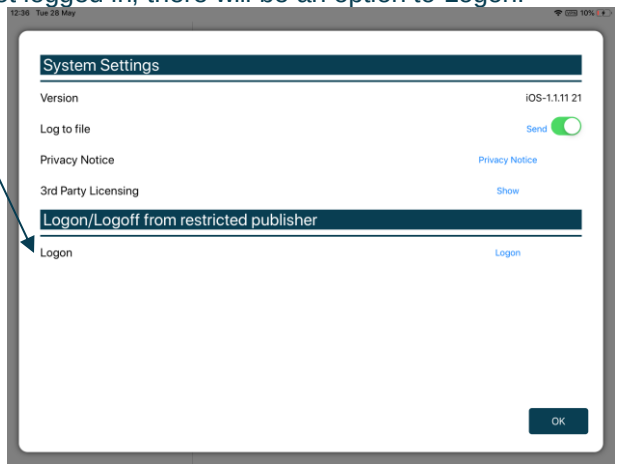
If you have subscribed to an organisation with restricted access, it will appear with a pink background when you access Switch between your organisations from **The Settings Menu**:



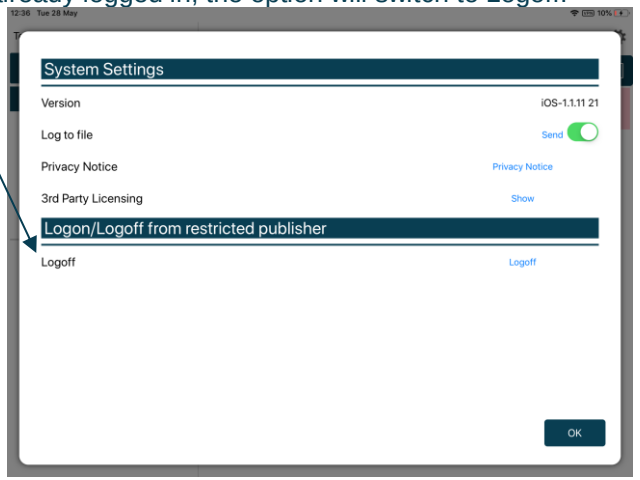
Logon and Logoff options in the Settings Menu

To access, **tap** the Settings icon at the top right of the home screen (main menu): ⚙

If you are not logged in, there will be an option to Logon:



If you are already logged in, the option will switch to Logoff:



The app will also logoff users automatically when the app has been closed, when the device's screen saver has activated due to inactivity, or when the app has been open but has not registered any activity for two hours.

In-App Voting

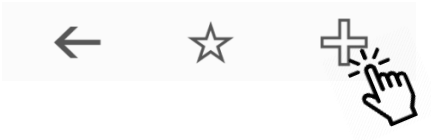
In-app voting was introduced in the spring of 2020. Planned recorded votes set up in Issue Manager before the meeting now appear in the app, and additional recorded votes can be created in-app if requested during the meeting. Users with administrative rights will be able to start and stop votes during the meeting.

Vote details from the app, whether for planned or ad hoc recorded votes, will sync automatically with Issue Manager for merging into minutes. They will also appear on the website if you have this feature enabled.

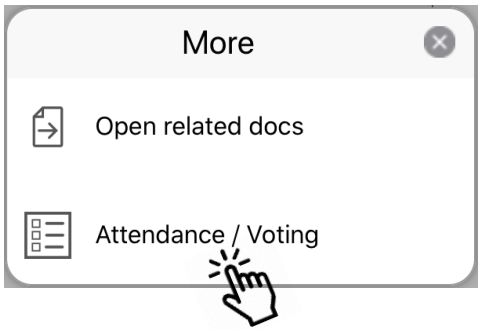
This feature is available only on the restricted version of the Modern.Gov app because the system needs to know the user's identity to check their eligibility to vote. Public app users will not see any changes to their app's appearance or functionality.

Please refer to Recorded Voting Online Help for guidance on system parameters to assign administration features and casting vote options to specific users, and the Recorded Vote features in Issue Manager, minutes templates, extracts and on the web. Please do not go into the Recorded Vote tab in Issue Manager while In-App Voting has a vote in progress.

To access from the Document Viewer Toolbar, **tap** the **More** button:



Tap the **Attendance / Voting** option:

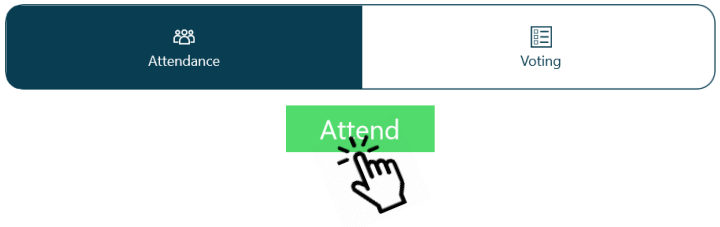


From any screen, **tap** the Close button at the bottom right of any screen to return to the agenda pack:

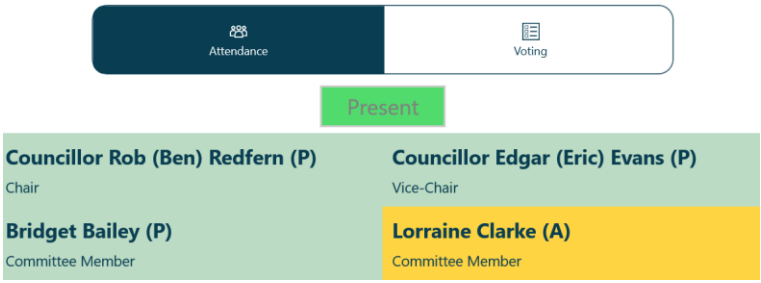
Committee Members

Committee members will see two buttons, one for attendance and one for voting.

Tap Attendance (left button), then the Attend button to record your presence:



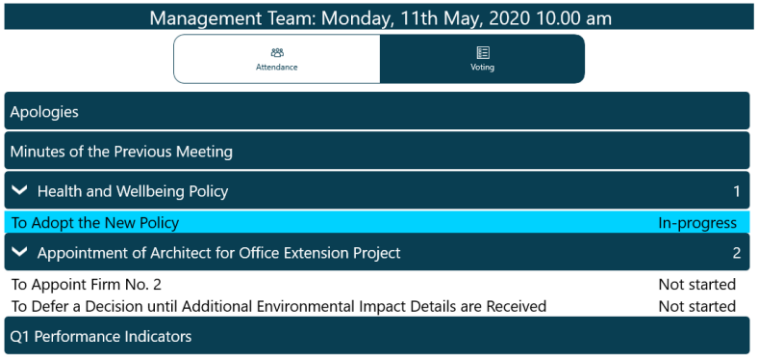
The attendance list below will update automatically as attendees confirm their presence:



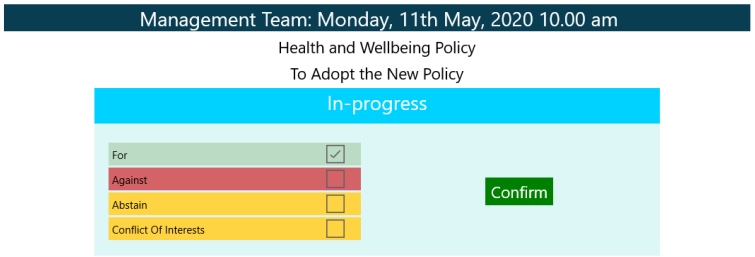
(Apologies previously received and entered by the meeting administrator display on an amber background.)

Tap Voting (right button) to access the vote list, which displays the list of agenda items and votes to be held:

When the Chair calls for a vote, the item will be highlighted and its status updated to “In progress”. **Tap** on that row to open the voting panel.

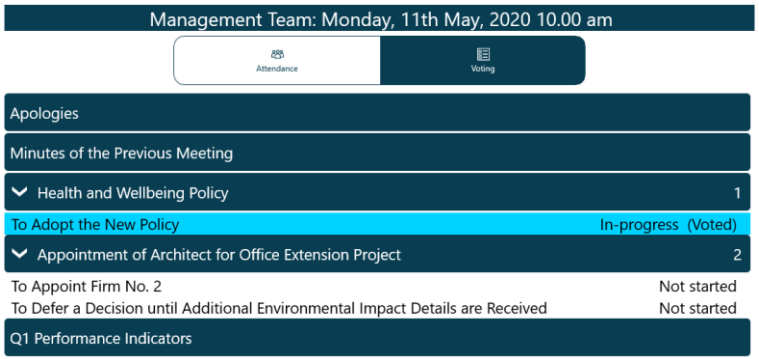


Make a selection from the available options, then **Confirm**:



Your selection displays. **Confirm** to proceed or **Cancel** to return to the options and make a different selection:

The voting panel indicates that your vote has been received:



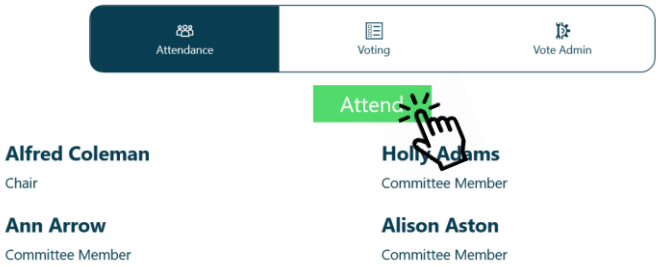
When the Chair ends the vote, the voting panel will update with the result:

Voting Administrators and Casting Votes

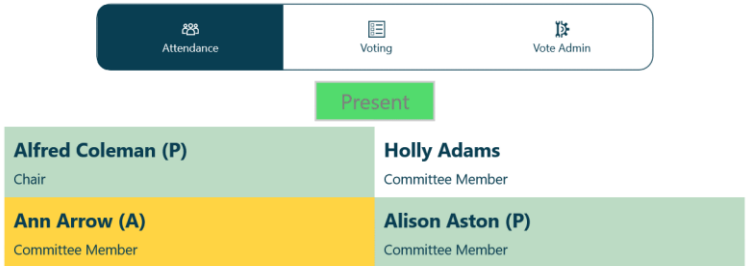
Getting started

Administrators will see three buttons, one for attendance, one for voting and one for administering votes (including making a casting vote in the event of a draw).

Tap Attendance (left button), then the Attend button to record your presence:



The attendance list below will update automatically as attendees confirm their presence:



(Apologies previously received and entered into Issue Manager display on an amber background.)

Tap Voting (middle button) to access the vote list, which displays the list of agenda items and votes to be held:

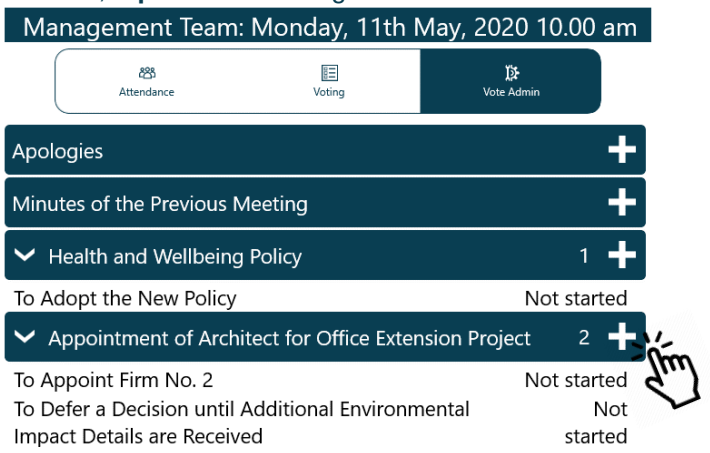
(If you are eligible to vote in a meeting, return to this screen after starting the vote, then follow the instructions for voters.)

Tap Vote Admin (right button) to access administration options, which shows the voting list in the same order that voters see:

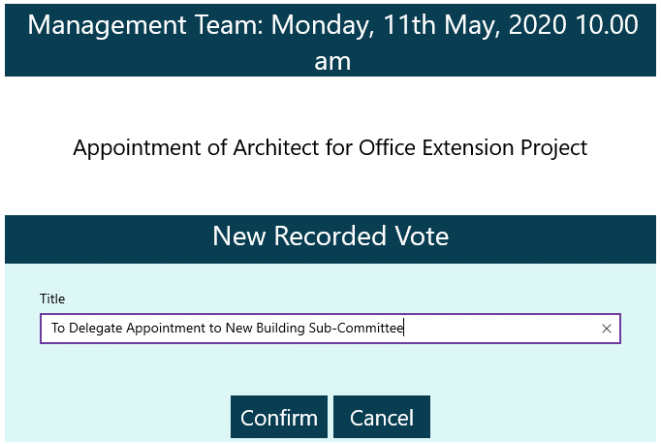
The votes displayed initially will be those created in Issue Manager before the meeting.

Adding votes

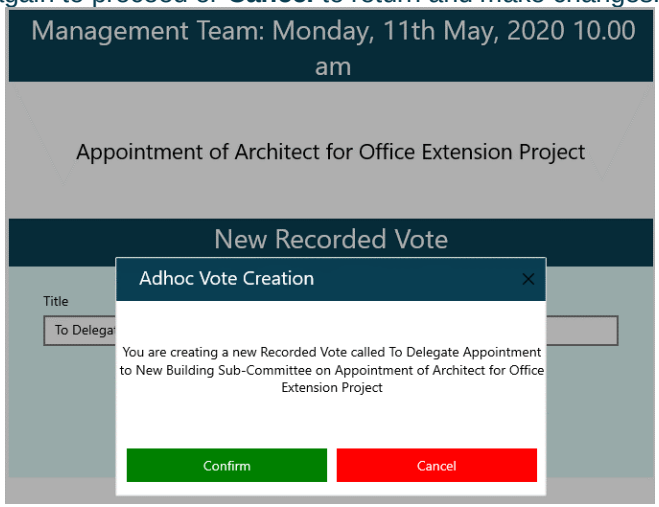
To add more votes, **tap +** next to the agenda item name:



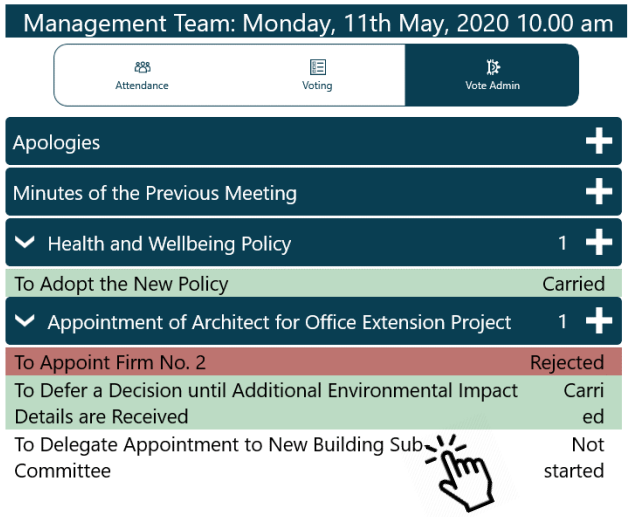
The Ad Hoc Vote panel opens. Add details and **Confirm**, or **Cancel** to exit without creating a new vote:



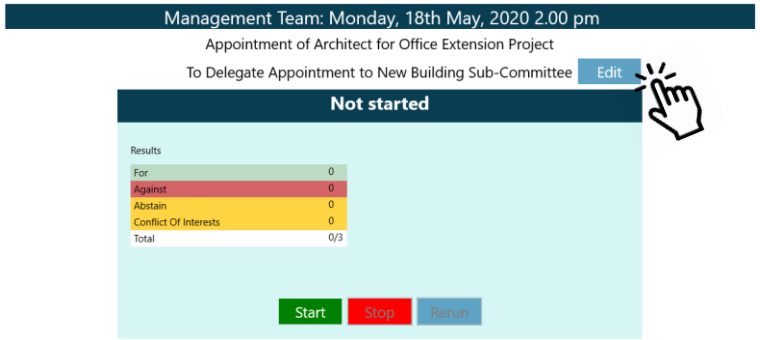
Confirm again to proceed or **Cancel** to return and make changes:



Once confirmed, the vote appears in the voting list. To edit or delete the new vote, **tap** the title to open it:



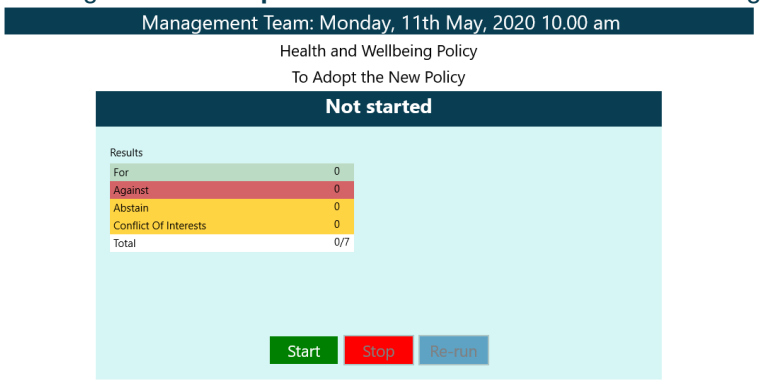
Edit to amend the title or delete the ad hoc vote:



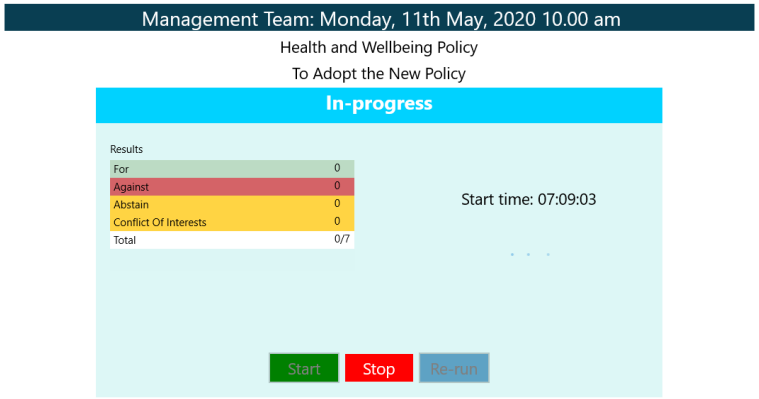
Amend the title and **Confirm**, **Cancel** to return without saving changes, or **Delete** the vote entirely:

Running a vote

To start voting on an item **tap** the item name and the screen will change to:

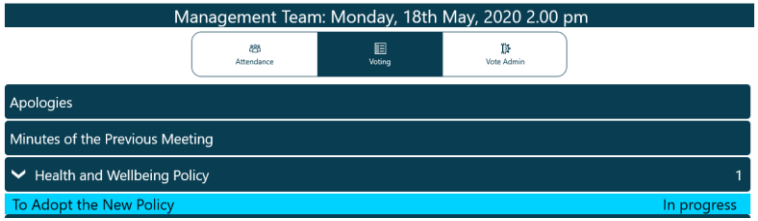


Start updates the status on all apps to “In progress”, and voters can now cast their votes:

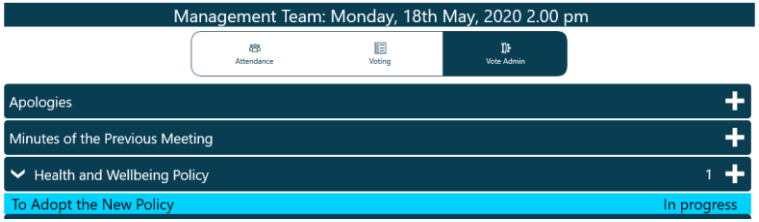


If you are eligible to vote, **Close** this screen from the bottom right…

…and return to the **Voting** menu (second button) to select the item, and cast your vote:



Then return to the Vote Admin screen (third button) and select the item to resume administration of the vote:



When the vote has finished, **tap** the Stop button. The results will synchronise:

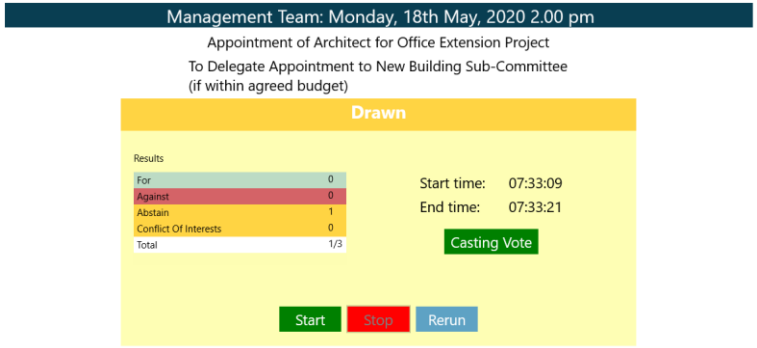
The outcome will be displayed:

If stopped prematurely, **Start** allows you to resume the vote, ***retaining*** the results already recorded.

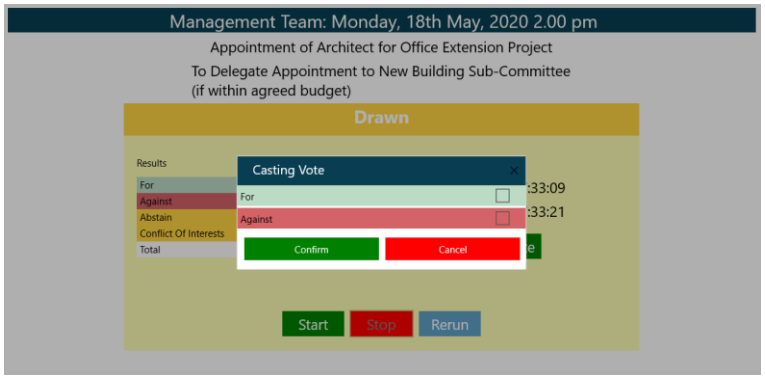
If necessary, **Rerun** will ***nullify*** all results, allowing the vote to begin afresh.

Casting Votes

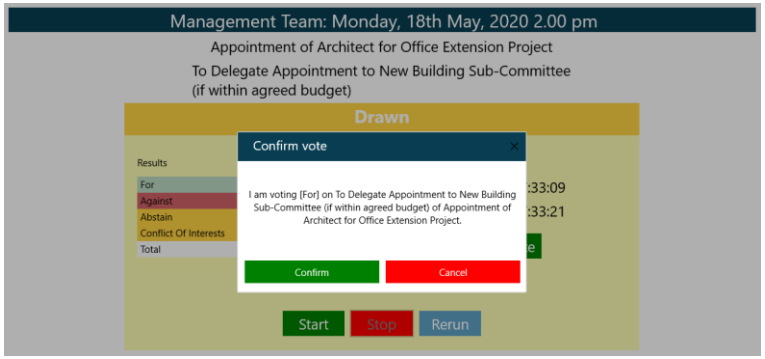
In the event of a draw, the Casting Vote option becomes available to users who may make a casting vote. **Tap** the Casting Vote button:



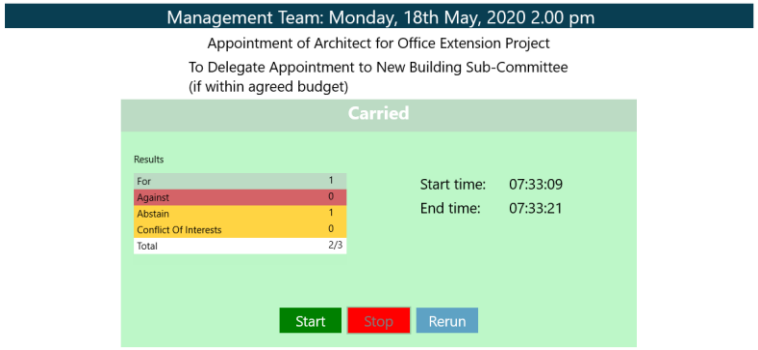
Make the Casting Vote and **tap** Confirm:



Confirm the selection or **Cancel** to return and make a different selection:



The results screen updates:

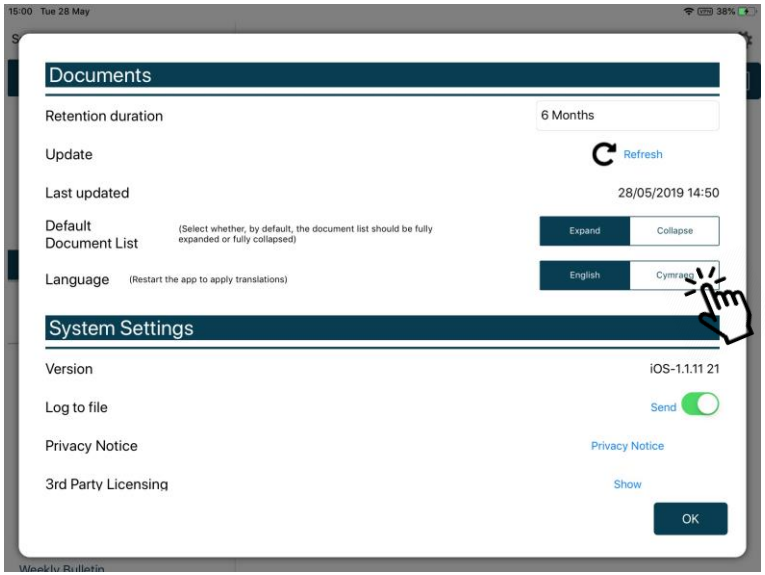


The total votes cast can be greater than the number of eligible voters if all voters participated in the initial vote and the Chair has made a casting vote. For example, a total of 15/14 indicates that the outcome included a casting vote.

Welsh Language Version

A Welsh-language version of the app is available. When the app is opened for the first time, it will automatically select the default language you have set for your iPad.

To change the app's default language, open the **Settings** menu and **tap** Cymraeg in the Language section, then **tap** OK.



Restart the app to apply the changes. The app will now open with Welsh as the default language, regardless of your iPad's default language settings.

(**Important note**: documents published to the Modern•Gov app will still appear in the language in which they were originally published. If they were originally published in English, they will still appear in English.)

Document Control:				
Version:	**Author:**	**Date:**	**Comments:**	**Status:**
6.0	Holly Adams	18 May 2020	In-App voting added	Complete
5.2	Holly Adams	29 July 2019	Minor edits for consistency; updated screenshots of Filters, Document Management Options and Subscribe to organisations.	Superseded
5.1	Holly Adams	7 June 2019	Updated cover image	Superseded
5.0	Holly Adams	31 May 2019	Application of Civica branding	Superseded