



Voyant Adviser

USER GUIDE

Using Voyant Offline

Offline Setup and Best Practices

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Using Voyant Offline - A Guide to Offline Setup and Best Practices

As a Rich Internet Application (RIA), Voyant normally operates using a live internet connection. However, Voyant can also be run in offline mode when or where no internet connection is available. Travelling to visit a client? Take Voyant on a laptop and use the software to create, present, and update a financial plan regardless of internet availability.

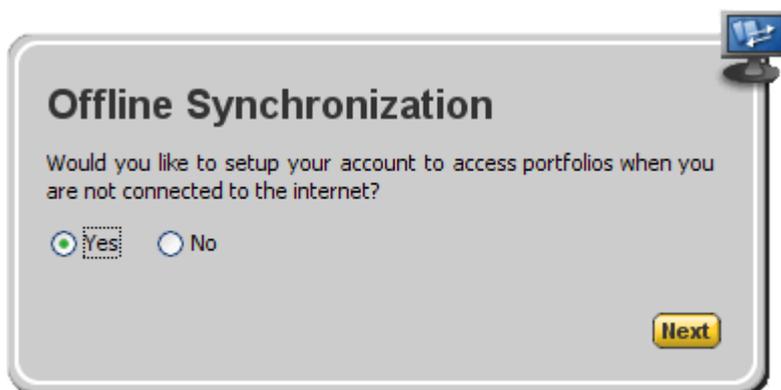
The following guide shows how to configure Voyant for offline use. It also offers a set of best practices to follow in order to prevent any problems when operating in offline mode.

Offline mode is simple to use but don't run afoul of the seven day offline usage limit, forget an offline passcode, fail to synchronise with our servers before or after working offline, or forget to setup offline mode before needing it. This guide shows that setup takes seconds and if you follow the twelve best practices, operating offline should be trouble free.

Setting Up Offline Mode and an Offline Passcode

Set Up Offline Mode During Installation

After downloading and first opening Voyant, you will be asked whether you want to have access to client files when running Voyant offline. Select **Yes** if you plan to use Voyant to access client information, at least occasionally, in the offline mode.

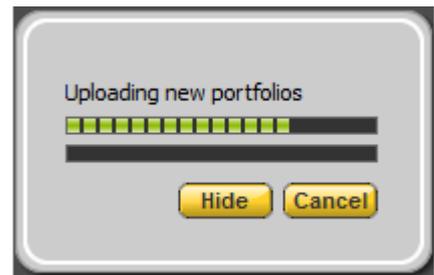


As an additional security precaution, a passcode (offline password) is used to encrypt client files and authenticate user credentials when Voyant is used in offline.

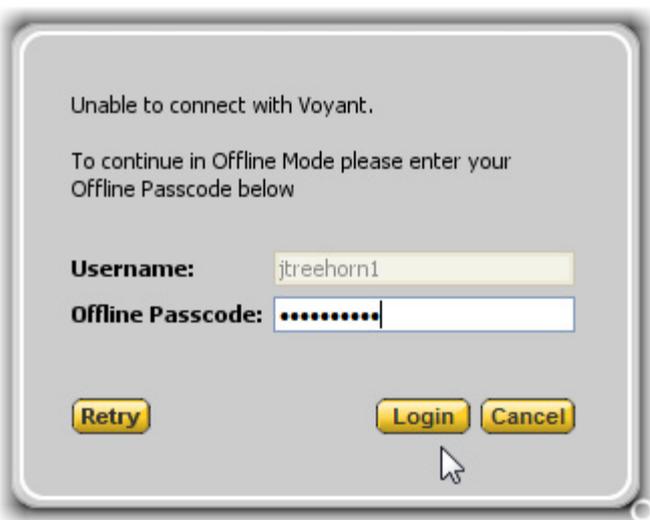
Enter a passcode that is at least six characters long. This passcode can later be changed and offline mode enabled or disabled, if necessary, by accessing **Preferences** in the lower left corner of the screen. Expand **Application Preferences** to view the offline mode settings.



Later, as you bring your computer online again, client files will be automatically synchronized with Voyant's remote hosting environment. Synchronization allows client information to be accessed from any computer – at home, in the office or on the go – without ever transferring files from computer to computer.



With offline mode enabled as an option, you will be prompted to enter a passcode whenever Voyant detects that an internet connection is unavailable. This passcode will allow you to log into the software and access client files locally when the Voyant server cannot be reached.

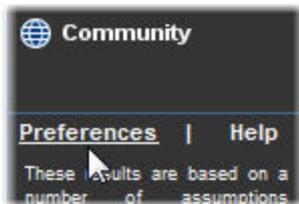


Set Up Offline Mode After Installation

Preferences - Activate Offline Mode and Update Your Offline Passcode Anytime After Installing Voyant

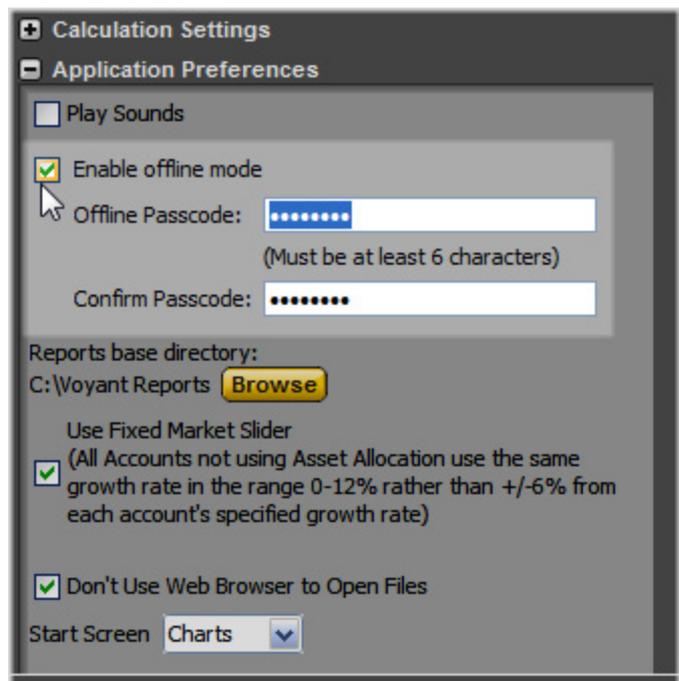
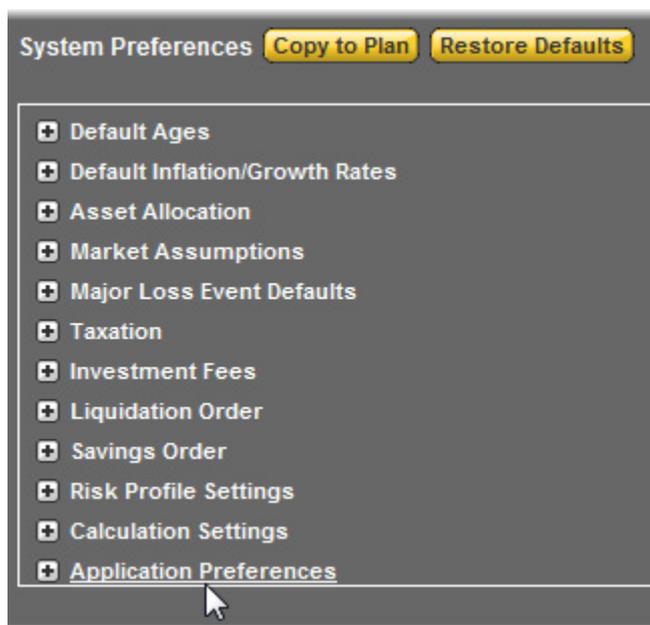
To view and update settings related to running Voyant offline, click the desktop link to open Voyant, sign in, and click and open any client record.

1. Click the **Preferences** link in the lower-left corner of the software's navigation.



Preferences are arranged into a series of expandable panels.

2. In the **System Preferences** on the left side of the screen, expand the **Application Preferences** panel.



Tick the **Enable offline mode** checkbox to allow the software to be used offline.

3. Enter an **Offline Passcode** of at least 6 characters and reenter it to confirm the passcode. **Note:** Passcodes are case sensitive.
4. Click the **Apply** button in the bottom-right corner of the **Preferences** screen to save these changes.

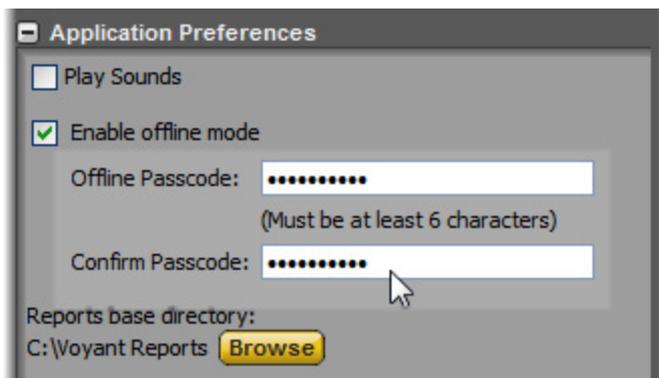
Best Practices - 12 Things to Know About Offline Mode

Offline mode allows users to access the software without an internet connection for up to a **maximum of 7 consecutive days**. To use Voyant offline, you must have offline mode enabled for your computer and you must enter an offline passcode to unlock the software and access your local store of client cases. We use offline passcodes as a security precaution, to prevent anyone from accessing your client cases were your computer fall into the wrong hands.

There are few important things to note about offline mode and best practices to follow when using it. All of this may appear a bit daunting but most of this is common sense once you understand how offline mode operates.

1. Choosing an Offline Passcode

The offline passcode (password) could match your regular Voyant password. This passcode is encrypted and stored securely on your computer. We generally recommend that the offline passcode and your password match to avoid any future confusion. This is however strictly up to you.



2. Offline mode is enabled and passcodes are stored on computers individually, by user account

Offline mode is enabled for computers individually. If you will be possibly using Voyant offline on multiple computers, be certain to enable offline mode and set the offline passcode for your account on each of these computers.

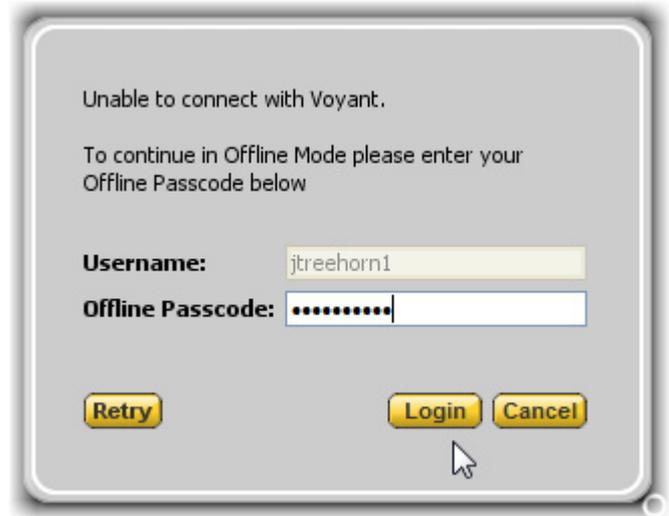
Offline passcodes are also stored on computers by user account. For example, if you use a laptop that is shared by other Voyant users at your firm, your offline passcode is usable only when logging in using your user account. If another user needs to use the software offline on the same computer, using their own user account, he or she would need to set an offline passcode for their own account.

3. After initially setting up offline mode, test it

After you have first enabled offline mode, try testing it.

1. Close Voyant.
2. Unplug or temporarily disable your internet connection.
3. Reopen the software whilst offline. Click the desktop link to open Voyant.
4. Sign in using your Voyant user name and password.

The software will attempt to connect to our servers. Once it finds that a connection cannot be established, you will be prompted to enter an offline passcode.



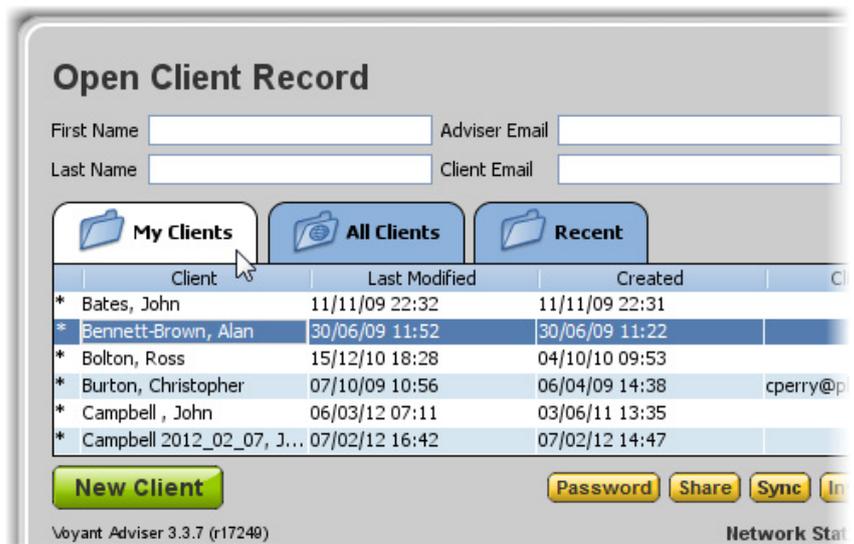
5. Enter your **Offline Passcode**, which you set earlier.
6. Once the **Open Client Record** dialogue displays, check the **My Clients** tab. Verify that you can open any one of these client files.

4. The My Clients tab displays all of the client files that will be available to you when working offline

The **Open Client Record** dialogue's **My Clients** tab shows not only the client files owned by your user account, it also shows the files that will be available to you when working offline. The **All Clients** tab, by contrast, shows records stored on our servers. These may be a mix of your own records, those created and owned by your user account, and files created and owned by your colleagues that you are allowed to access.

 **Note:** Any record that is shown on the **All Clients** tab but not on **My Clients** will not be available for offline access.

How do you move a record, perhaps one created by a colleague, onto the My Clients tab to access it offline? See the instructions on "**Sharing Client Files with Colleagues**".



5. Test for client file access before going offline

As a rule, we generally recommend that you run a similar test prior to taking the software offline. While you are still at a location with internet access, take your software offline, enter your offline passcode, and confirm that the desired client file can be opened. We recommend that you test for access while an internet connection is still available because once offline, there is no way to synchronise with the servers or to troubleshoot any problems.

6. Updates when working offline? Bring the computer online as soon as internet access is available

When working offline, be sure to save your changes. As a best practice, always reopen the computer once an internet connection is available again, whether updates were made or not. Log into the software and allow it to synchronise your files with the Voyant server. Allowing the software to synchronise will ensure that any work done on computer, changes made originally offline, will later be available on other computers.

7. Always follow the online-offline-online rule

When you plan to use Voyant offline, **always follow the online-offline-online rule.**

1. On the computer that you plan to take offline, open the software online before leaving to go offsite. Open the software by clicking the desktop link to Voyant, not by logging in through our website. Sign into the software, allowing it to automatically synchronise client files with our servers.
2. Close the software.
3. Use the software offline and save any changes made to your client's case.
4. Reopen Voyant (on the same computer) and log into the software as soon as you are in a location where internet service is available (e.g. at the office, at home).

Logging in online allows the software to synchronise with our servers and loads any unsaved changes to the client case, made from other computers, onto the computer that is about to be taken offline.

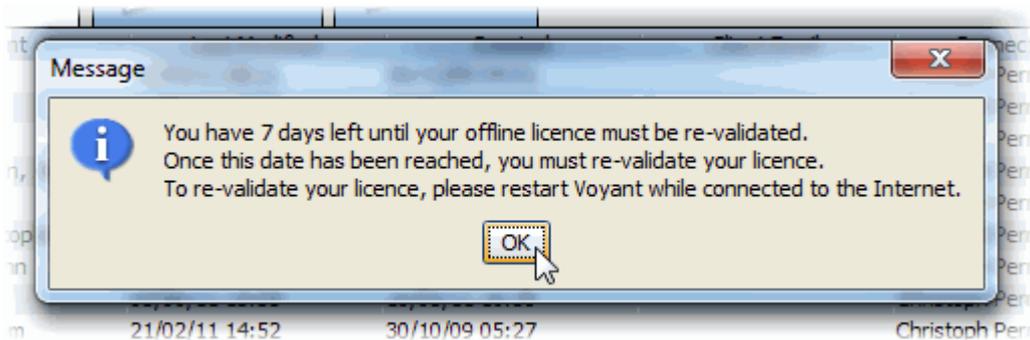
Also, opening the computer online validates your licence with our servers, renewing your 7 day offline usage maximum. Users who forget to log in on a computer since they last took it offline may be unpleasantly surprised to find that they are well past the 7 consecutive day count and are not allowed to open the software in offline mode before first connecting with our servers.

Once you have used the software offline, save any changes, and close the software

As soon as you return to a location with internet access, open the software online. Doing so will ensure that any changes made offline are uploaded to our servers and are available for access on other computers. Also and perhaps most importantly, logging in again ASAP ensures that your offline day count is refreshed for the next time you need to use Voyant in offline mode on this computer.

8. Offline Access is Limited to 7 Consecutive Days

The software can be used in offline mode for only up to a maximum of 7 consecutive calendar days, after which you will be required to log in online and confirm your account credentials. The 7 calendar day countdown begins as soon as you login offline. This countdown runs for seven consecutive days following login, not seven days of usage. The countdown continues regardless of whether you are using the software during this time. After seven days is up, you must log into the software online. Once you have connected to our servers, the offline usage count is set to zero.



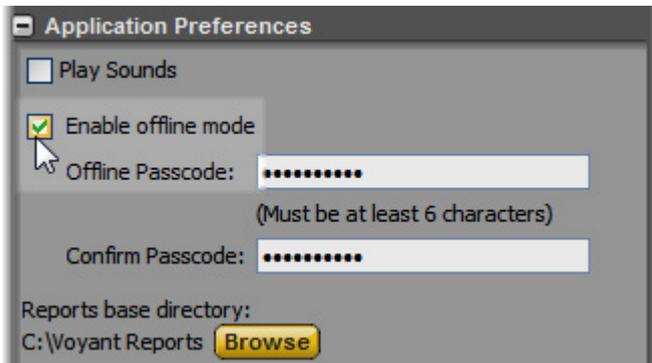
Important Note: Offline Usage Countdowns are Tracked and Reset on a per Computer, per User Account Basis

Licence validations and offline usage countdowns are tracked on a per computer and per user account basis. For example, you used Voyant today offline on a laptop. When you logged on in offline mode, a 7 day usage countdown began for your user account on that laptop. Logging into Voyant from another computer, a desktop computer at work, for example, would not reset the offline countdown for the laptop. You must log into Voyant online again on the laptop, using your user account, to reset the offline usage count to zero on that computer.

 **Tip:** This seven day limit is another good reason to log in again once an online connection is available. Once you log in online, the offline usage day count is reset to zero, readying the software for the next time you need to use it in offline mode. If you sign in online again as soon as possible, after having used the software offline, you should never run afoul of the 7 day limit.

9. Offline mode can only be enabled initially online

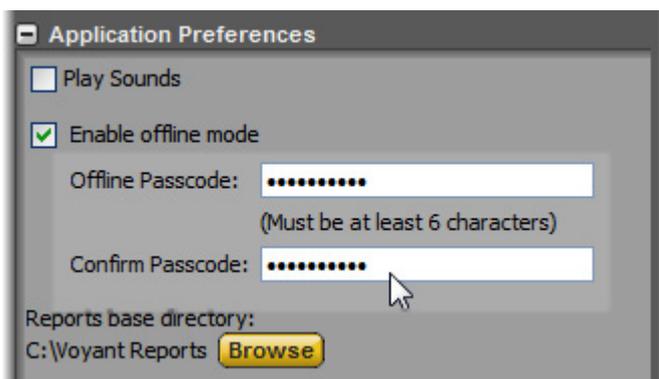
Offline mode can only be enabled, initially, when online, either when installing the software or by visiting the software's **Preferences > System Preferences > Application Preferences**. Offline passcodes can only be reset after logging into the software, online or offline. Setup takes only seconds and only needs to be done once for your user account on a given computer, so be sure to enable offline mode *before* you need it.



10. Offline Passcodes can only be changed after logging into the software, online or offline

To reset an offline passcode, you must be able to first log into the software. This is to say that you must be online or if offline, you must be able to enter your original offline passcode to open the software and reset your passcode.

Passcodes are reset by signing into the software, selecting and opening any client record, and clicking the **Preferences** link in the bottom-left corner of the software's navigation. In **System Preferences** (on the left side of the screen), expand the **Application Preferences** panel. Verify that **Enable Offline Mode** setting is ticked. Then enter and confirm the offline passcode. Remember that passcodes are case sensitive.



11. Remember your passcode. There is no password reminder mechanism for offline passcodes.

There are **no password reminder mechanisms** for offline passcodes. You must remember your passcode and remember that passcodes are case sensitive. Once you are working offline, our support staff will be unable to assist you with a forgotten offline passcode since these codes are stored only locally.

12. Haven't used the software offline in some time? Test offline mode before going offline.

If you haven't used the software offline in some time, it is best to test it in offline mode when you are in a location that still has internet access. This will give you the opportunity to connect to our servers, sign in online and reset your offline passcode if you have forgotten it.

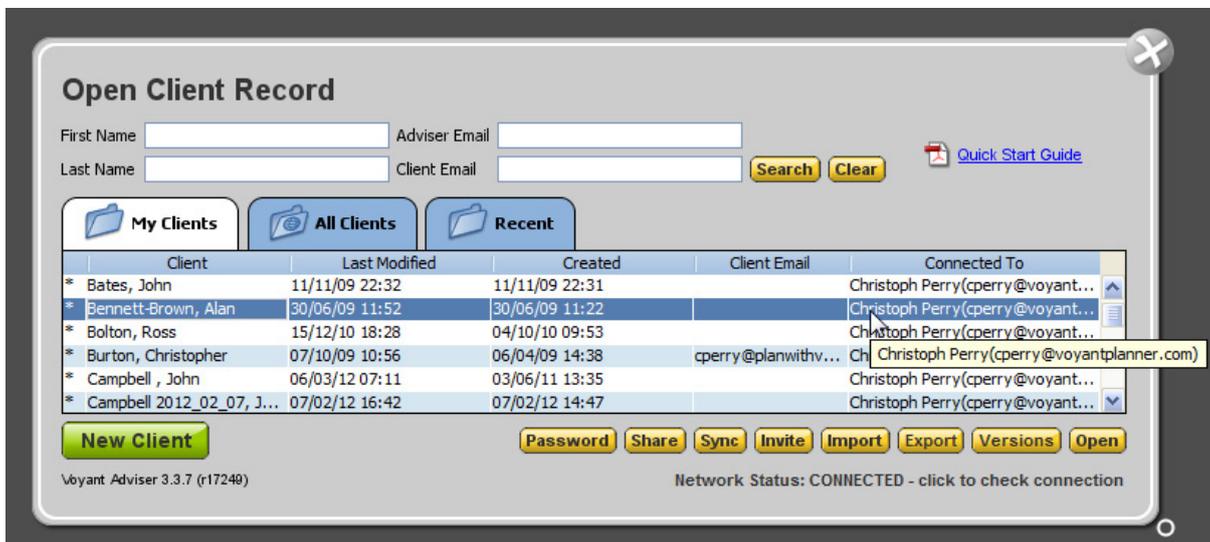
1. First, open Voyant online by clicking the desktop link to the software.
2. Sign into the software and allow it to automatically synchronise with the Voyant servers.
3. Close Voyant.
4. Unplug or temporarily disable your internet connection.
5. Reopen the software whilst offline. Click the desktop link to reopen Voyant.
6. Sign in using your Voyant user name and password.

The software will attempt to connect to our servers. Once it finds that a connection cannot be established, you will be prompted to enter an offline passcode.

7. Enter your **Offline Passcode**, which you set earlier.
8. Once the **Open Client Record** dialogue displays, check the **My Clients** tab. Verify that you can open the client file you intend to access offline.

Ownership of Client Records and Offline Access

To access Voyant offline, your user account must have ownership of the client file. The **Open Client Record** dialogue's **My Clients** tab shows not only the client files owned by your user account, it also indicates which files will be available to you when working offline.



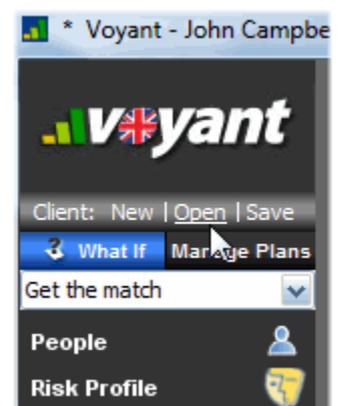
The **All Clients** tab, by contrast, shows the records stored on our servers. These may be a mix of your own client cases, those created and owned by your user account, and files created and owned by your colleagues that you are allowed to access.

Note that any record that is shown on the **All Clients** tab but not on **My Clients** will not be available for offline access.

How to Grant Co-Ownership of a Client Record to You or a Colleague for Offline Access

To share ownership of a client file with a colleague or to grant yourself these permissions first open the software.

1. Click your desktop link to the software. The **Open Client Record** dialogue will display when you first open the software, following the Upcoming Training screen.
2. If you are already working in the software, click the **Client: Open** button, top-left.

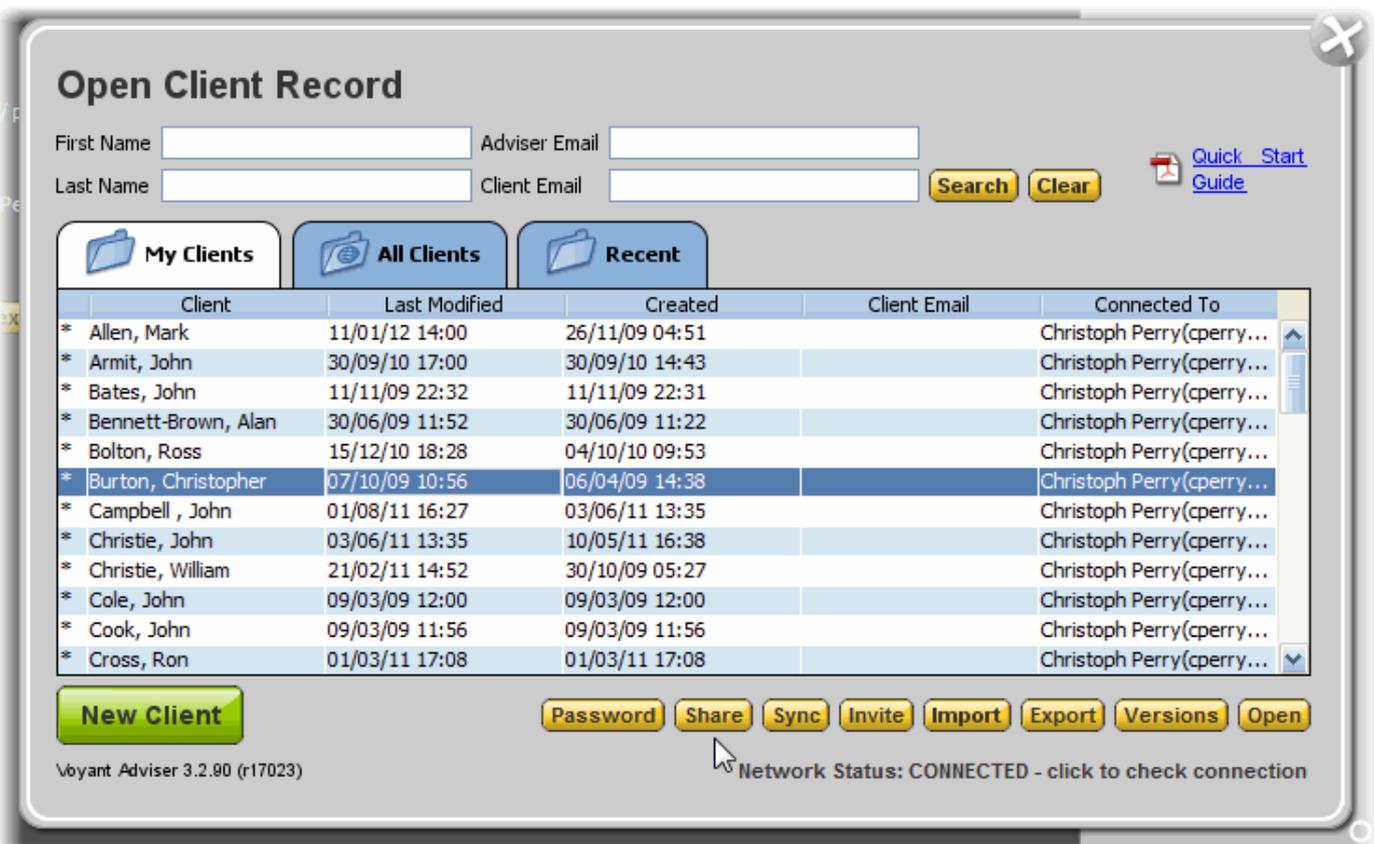


3. Select the **All Clients** tab.

If you are the owner of the subscription of have “all client access”, all of the client records created by your firm will be shown on this tab.

The "**Connected To**" column will show who owns the file. Note that there is a limited amount of space in this column so you may move your cursor over the name of the owner to view the complete list of owners, should multiple users already have ownership of the client file.

4. Select the client record you want to share with a colleague or with yourself.



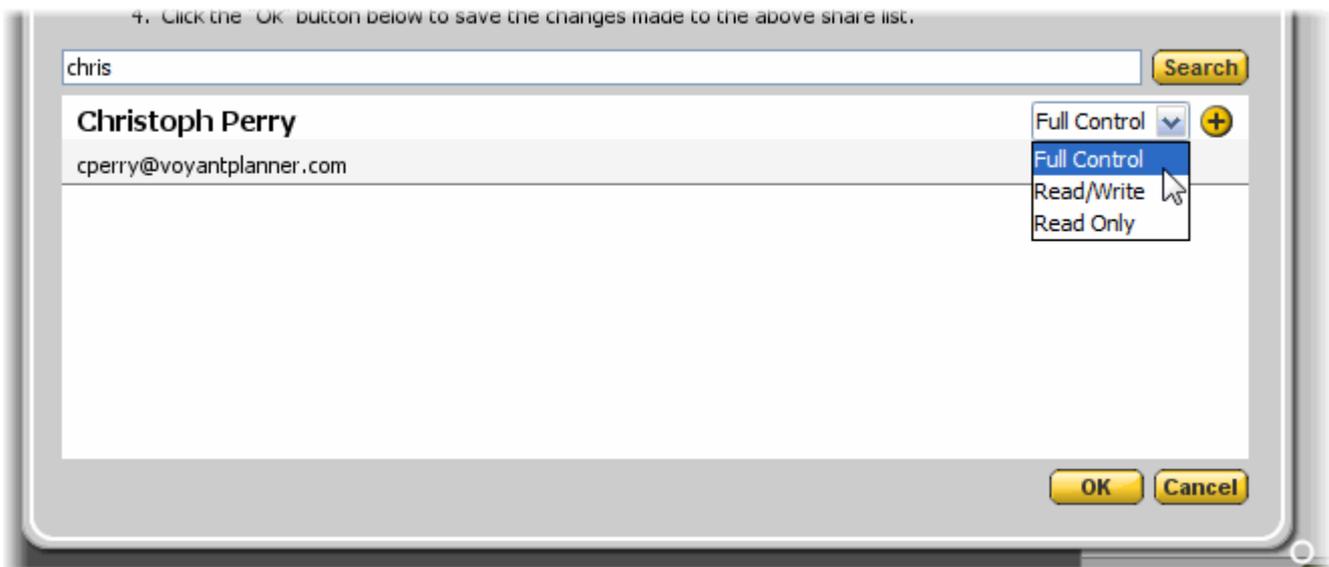
5. Click the **Share** button.

The **Shares** dialogue will display showing a list of users that currently have direct access to the client file and their permissions.

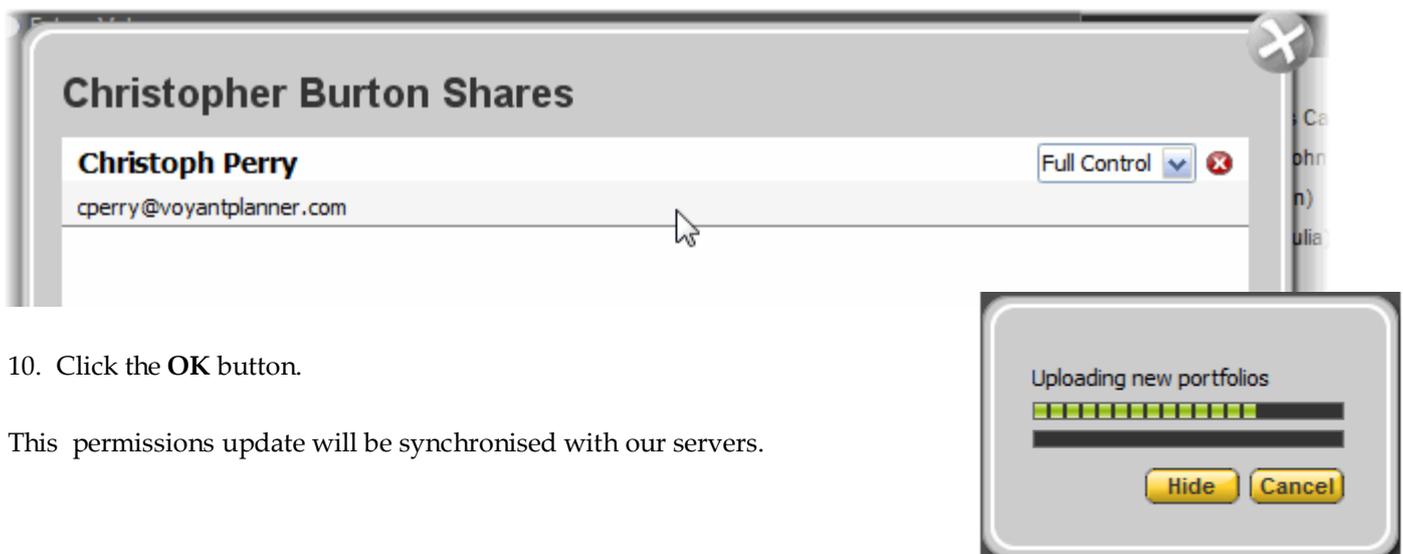
6. Enter your colleague’s (or your own) first name, last name, or e-mail address and click **Search**.

7. Select the level of permissions that will be granted to you or your colleague:
 - **Full Control** - Full access to read, edit, and share the file with others in your firm.
 - **Write** - View and edit the client file.
 - **Read** - Read-only access to the client file.

8. Select **Full Control** to grant co-ownership of the client file. This level of access will also ensure that the file can be accessed when working offline.



9. Click the **Plus (+)** button to add this person to the list of those sharing the client file.

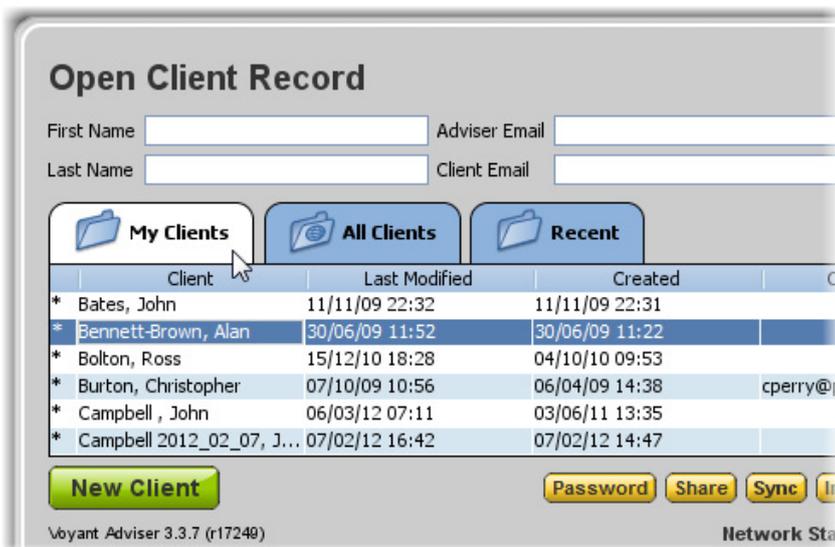


10. Click the **OK** button.

This permissions update will be synchronised with our servers.

Testing the Permissions Update: How to view client files accessible offline

As a test, have your colleague open Voyant Adviser and view the **Open Client Record** dialogue's **My Clients** tab. If you are granting yourself these permissions, do this check within your own software. This tab is a view of the user account's local file store. If the client file appears on the **My Clients** tab, it should be accessible offline.



11. Repeat steps 3 through 8 if permissions need to be granted to additional client files.

Resynchronise with the Voyant Servers Before Working Offline

If you are granting ownership to a colleague in order to make the client files accessible offline, after making permissions updates, always be certain to have your colleague open Voyant on the computer that is intended to be used offline. This must be done at least once following the permissions update in order to synchronise with our servers and update the computer's local offline file store for your colleague's user account. The computer must be online to resynchronise with the servers.

Offline file stores are user account specific. When logging into Voyant on this computer, be sure to use the account that has been granted the updated client file access. After logging in, the files will be synchronised with the Voyant servers and the local file store, which is viewed when working in offline mode, will be updated. Client files that will be accessible when working in offline mode will be shown on the **Open Client Record** dialogue's **My Clients** tab.

As a best practice, always open Voyant online and allow the software to resynchronise with the Voyant servers before using it in offline mode. Doing so will update your local client file store and will ensure that you have the latest version of all client files, especially if modifications are being made from various computers and possibly by multiple users.

Questions, Assistance?

Should you have any questions regarding Voyant Adviser and use of the software in offline mode, please feel free to contact our support staff by e-mailing support@planwithvoyant.co.uk.