



DILITRUST

DiliTrust DataRoom – Administrator guide

December 2020

Sommaire

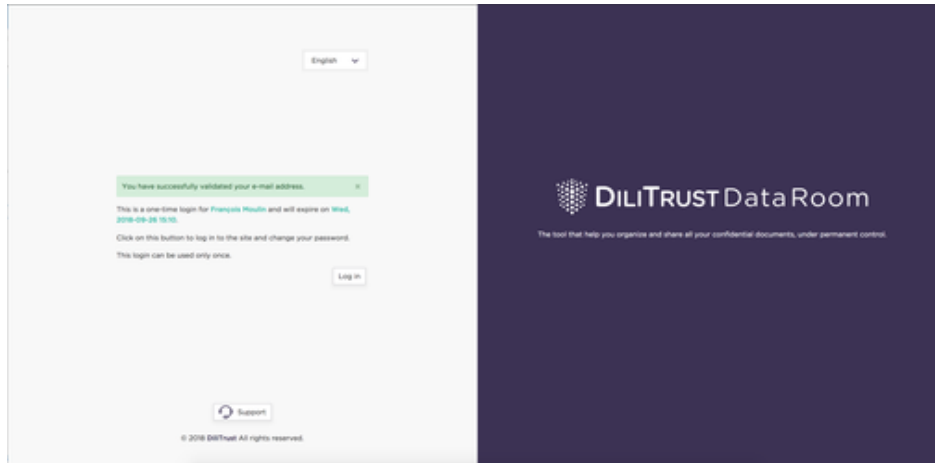
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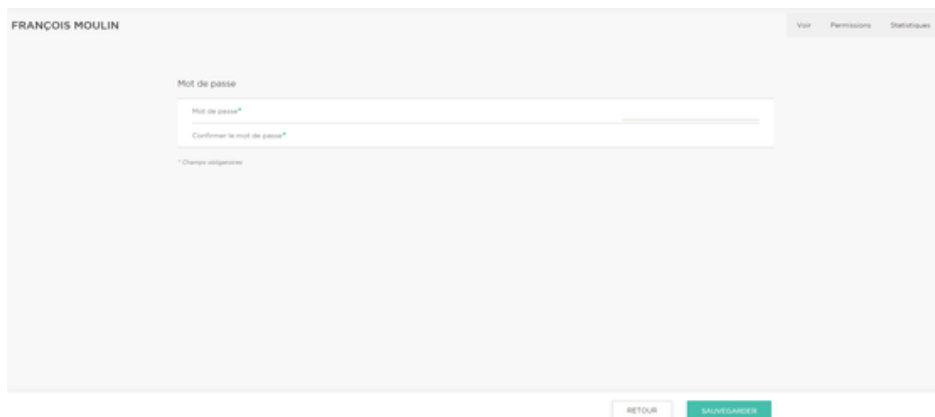
1. PRESENTATION

1.1. First login

For your first login click on the link received in your mailbox to confirm your email address and access the portal. After accessing the link in your web browser click on « Login ».



Complete your first login by choosing a secure password: It must contain a minimum length of 10 characters and 3 variants (lowercase, uppercase, special character, number). Click « Save » and you have now access to the portal.



NB: For future logins, use the email address and password you chose when creating your account.

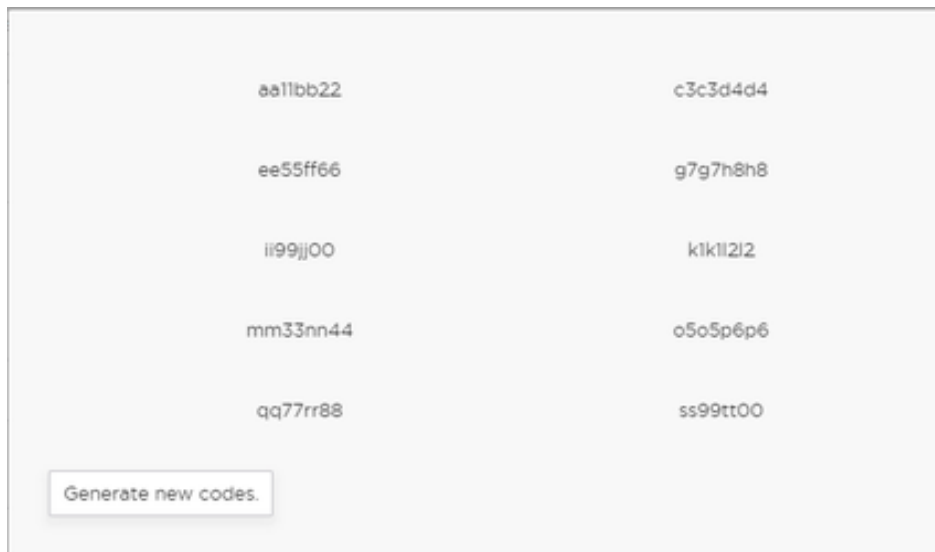
The two-factor authentication via SMS

If the two-factor authentication is activated on your account : When login in the portal you will enter your email address and password, if the information provided is correct you will receive a 6 characters code (numbers and letters) on your mobile phone which you will use to connect.

Backup Codes:

Backup codes allows you to access the portal even if you do not receive the one-time code via SMS on your phone. By going to your profile (« See my profile », then « Edit »), in the

« **two-factor authentication** » section, the [See my recovery codes](#) button gives you access to your ten backup codes. To display the ten backups codes, you will have enter your password.



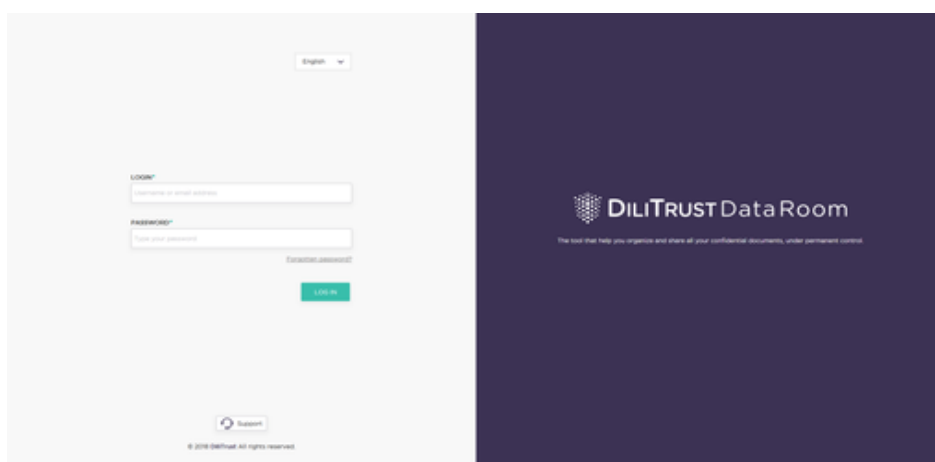
1.2. Access to the portal

You can access the portal through:

- The DiliTrust website www.dilitrust.com , by clicking on « Client Access » (top right) and choose "DiliTrust DataRoom",
- The following link: <https://dataroom-eu.dilitrust.com> .

1.3. Forgotten password

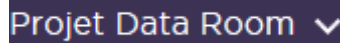
If you forgot your password, you could select the « Forgotten password? » link on the portal. Enter your login email address and you will receive an email indicating you to reset the password by clicking on the link. Note that this link is a unique connection and is only valid for 24h.



NB: If you don't receive an email, check your spam folder and if your email address was spelled correctly.

1.4. My datarooms

The dataroom name you have access to is indicated on the top left of the screen in the purple square.



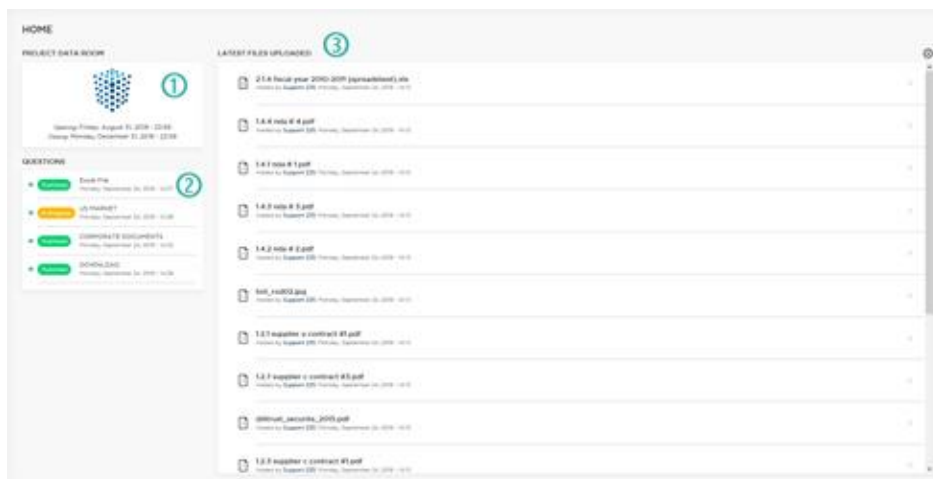
If you have access to several datarooms an arrow will show next to the name, giving you access to a drop-down menu. You can switch dataroom by clicking on its name.

NB: You can be an administrator on a data room and a simple user on another. To be certain to have access to all the datarooms you are member of, be sure that the portal administrators add you with the same email address you already use in another dataroom.


1.5. Home

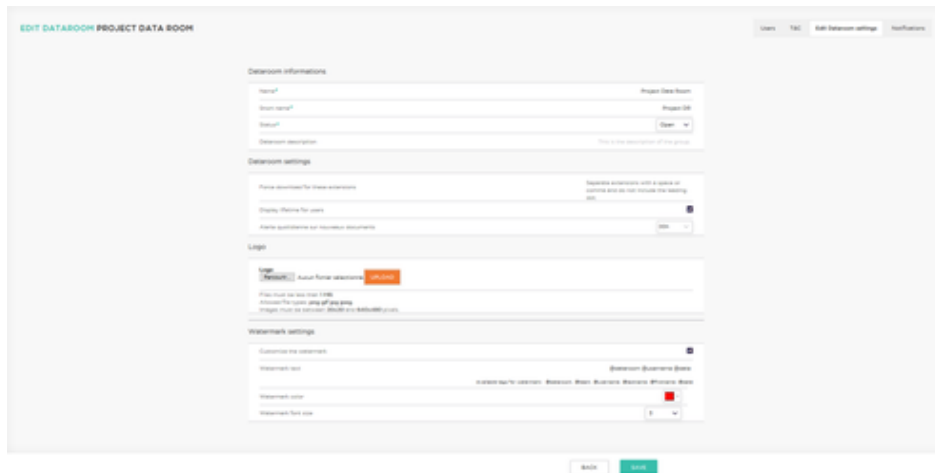
On the home page, you can see three sections:


- ①: The logo and Welcome Message,
- ②: Latest questions asked on the dataroom,
- ③: Latest files uploaded on the dataroom.



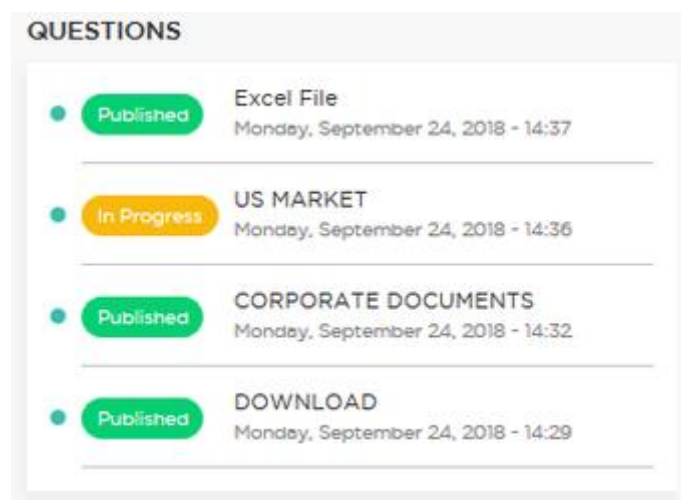
1.5.1. Logo and description message

To change the logo or the welcome message, hover over the logo's section and select the « Edit » button .



You can edit the message title, write, or modify the message or change the logo. Then click « Save »  to save your changes.

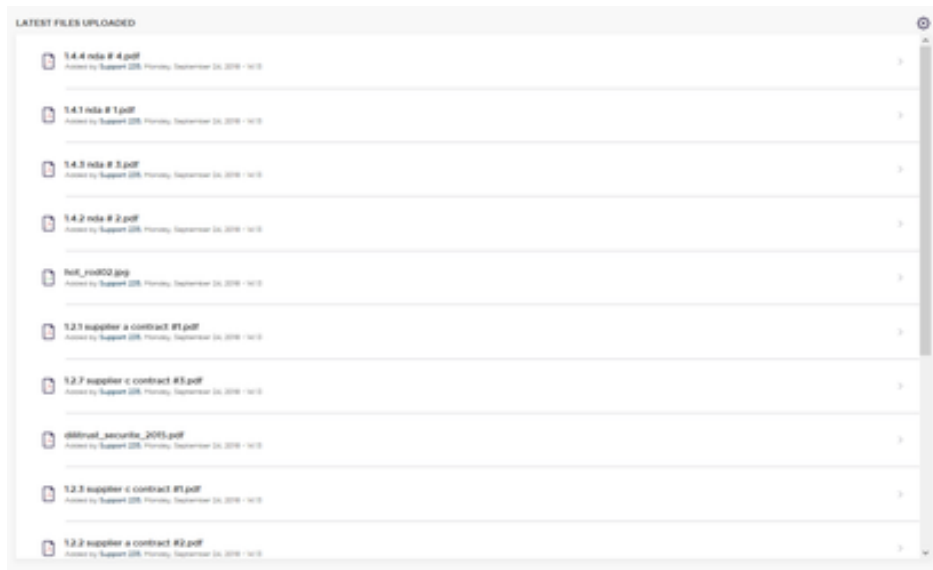
1.5.2. Q&A




The 5 last questions asked by all users on the dataroom will be shown in this section.

By clicking on a question, the administrator will be directed to the question, this will allow him to read it or answer it.

1.5.3. Latest documents uploaded



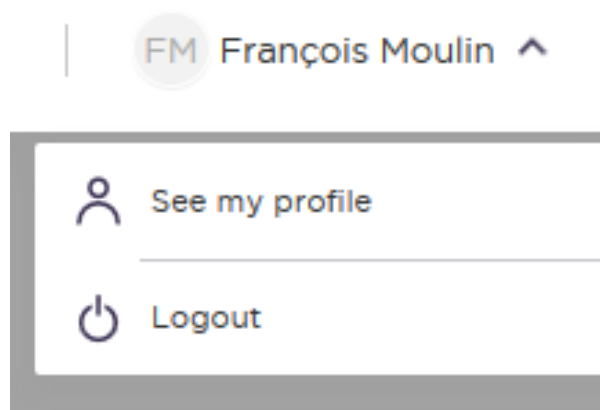
On this part, the list shows the last documents uploaded on the dataroom.

The administrator can choose which documents will be visible by users (according their access rights) by clicking on the button , by selected or unselected documents and confirming by clicking on "Done".


Note: The documents selected will be visible if the administrator confirms his choice. The unselected ones will not be shown in the list.

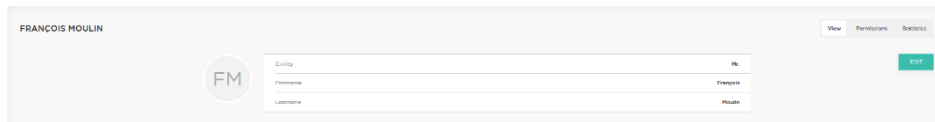
1.6. My profile

To access your profile, click on the arrow at the right of your name and select « See my profile ».



On your profile you will find your personal information filled in by you or by a portal administrator and the list of all rooms you have access to.

To change these your information, click on the "Edit" button .



FRANCOIS MOULIN

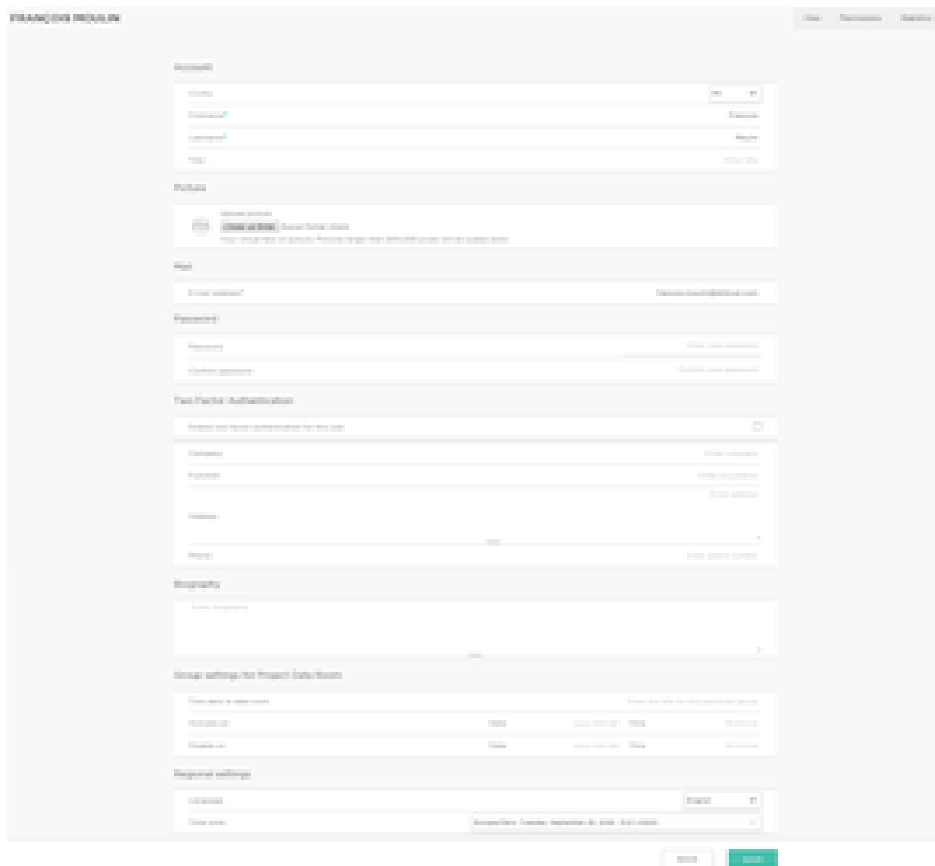
View Permissions Settings

FM

City: _____ No. _____
 First name: Francois
 Last name: Moulin

ENT

You will then be able to edit your name, title, add or remove your profile picture, your email address, your password, information about your occupation, time zone, the default group upon login on the portal, add or remove your signature (if it's enabled for your group). You can also add a biography.




FRANCOIS MOULIN

View Permissions Settings

Account

City: _____ No. _____
 First name: Francois
 Last name: Moulin

Profile

Profile picture:  [Upload profile picture](#)
 Your profile picture is visible. Please do not use anything inappropriate.

Sign

Enter signature: _____ [Remove your signature](#)

Password

Current password: _____ [Show your current password](#)
 Confirm password: _____ [Show your new password](#)

Two Factor Authentication

Enable two factor authentication for this user:

Code: _____ [Show code](#)
 Phone: _____ [Add a phone number](#)
 Email: _____ [Add an email](#)
 Name: _____ [Add phone number](#)

Biography

Enter biography: _____

Group settings for Project Status Board

Default group: _____ [View the list of Project Status Board groups](#)

Group name	Created on	Last modified	Members
Group 1	2024-01-01	2024-01-01	1
Group 2	2024-01-01	2024-01-01	1

Regional settings

Language: _____ [Show list](#)
 Time zone: _____ [Show list](#)

Cancel Save

To log out of the portal, select your account on the top right of the page and click on “Logout”.

2. DOCUMENTATION

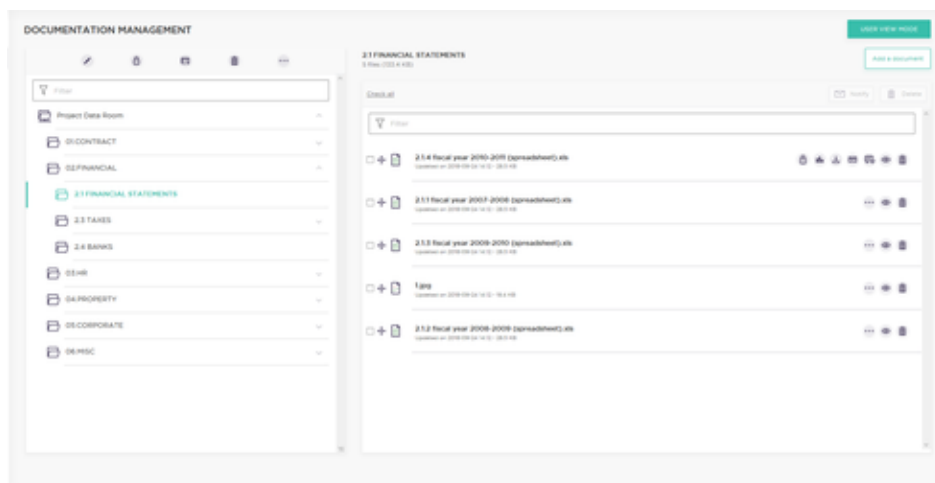
The « Documentation » tab includes all folders and files uploaded by administrators on the dataroom.

In the documentation tab, the main folder is located on the left side of the page (name of your dataroom).


A folder containing subfolders is indicated by a grey arrow on its right.

By clicking on a folder, the files within are displayed on the right side of the page.

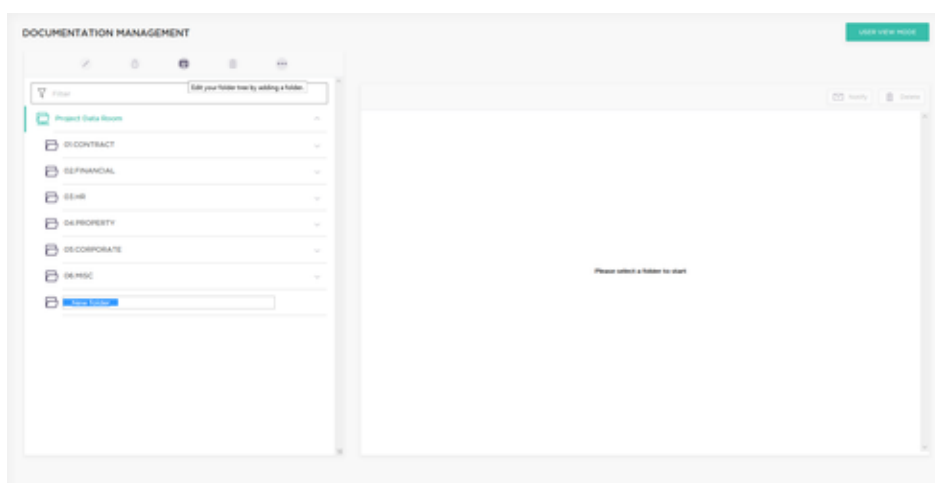
N.B. All following features are only accessible by an administrator.




2.1. Add a folder

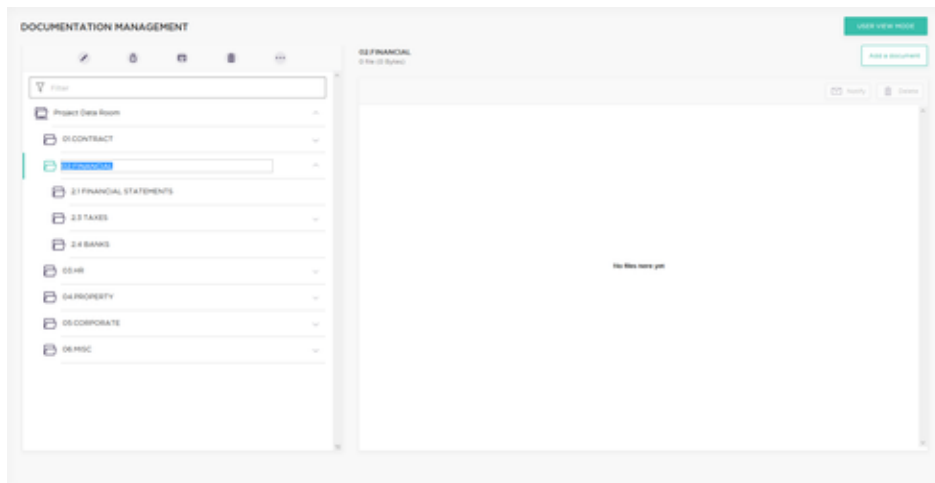
To add a folder in the main folder, select the dataroom name and click on the  button to create a new folder and name it.

The same applies to add a subfolder, select the main folder then click the icon above.



2.2. Rename a folder

To rename a folder, select it, then click  and rename it.



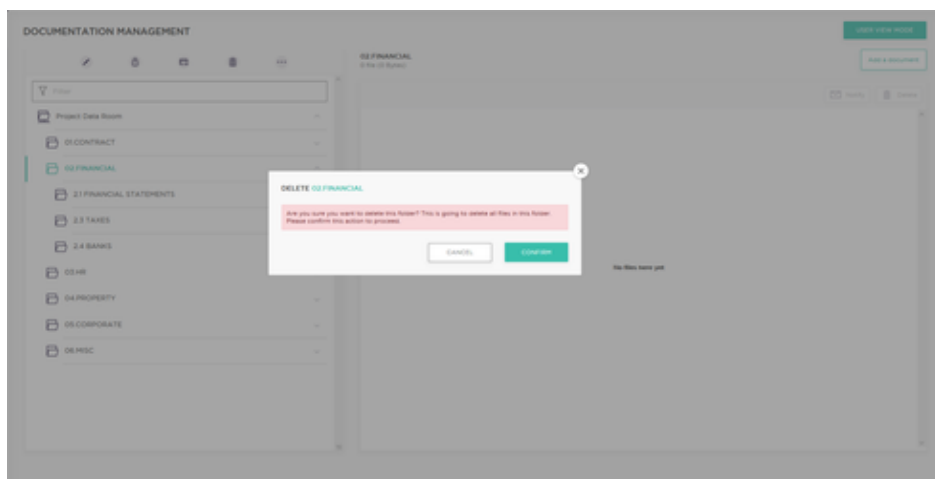
2.3. Delete a folder

To delete a folder, select it and click  (a confirmation will be required).

The deleted files will be available on the trash.

That trash is only accessible to the administrator who deleted the folders/files and he is the only one who can restore or delete them permanently.

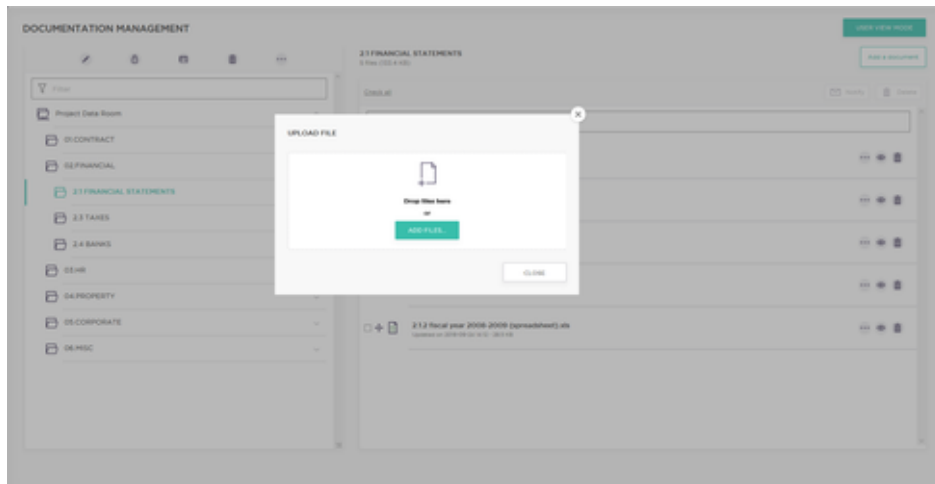
NB: The documents will be permanently deleted in 30 days.



2.4. Add documents

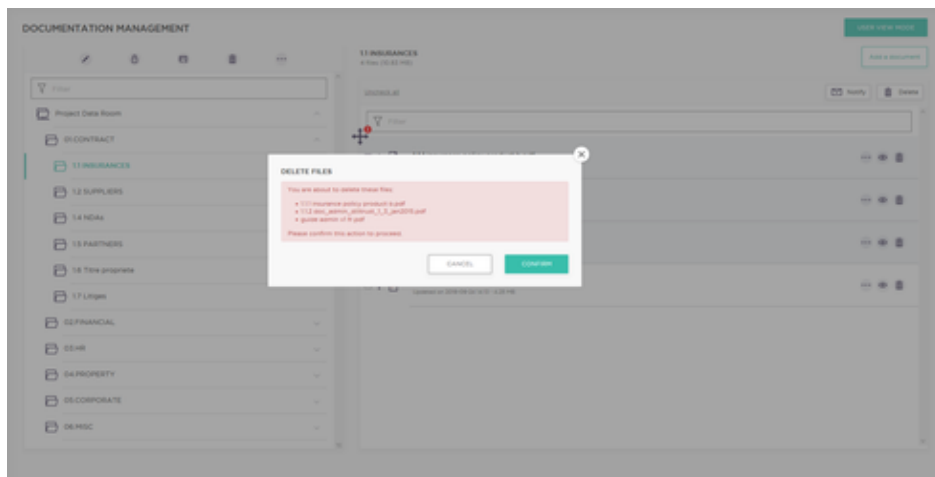
To add documents, select the destination's folder then click on « Add a document » .


A window opens, drag and drop files or browse them from your computer and they will be uploaded to the selected folder.




2.5. Delete documents


An administrator can delete documents by selecting one or several files and clicking on « Delete » (*you will be asked for a confirmation*).

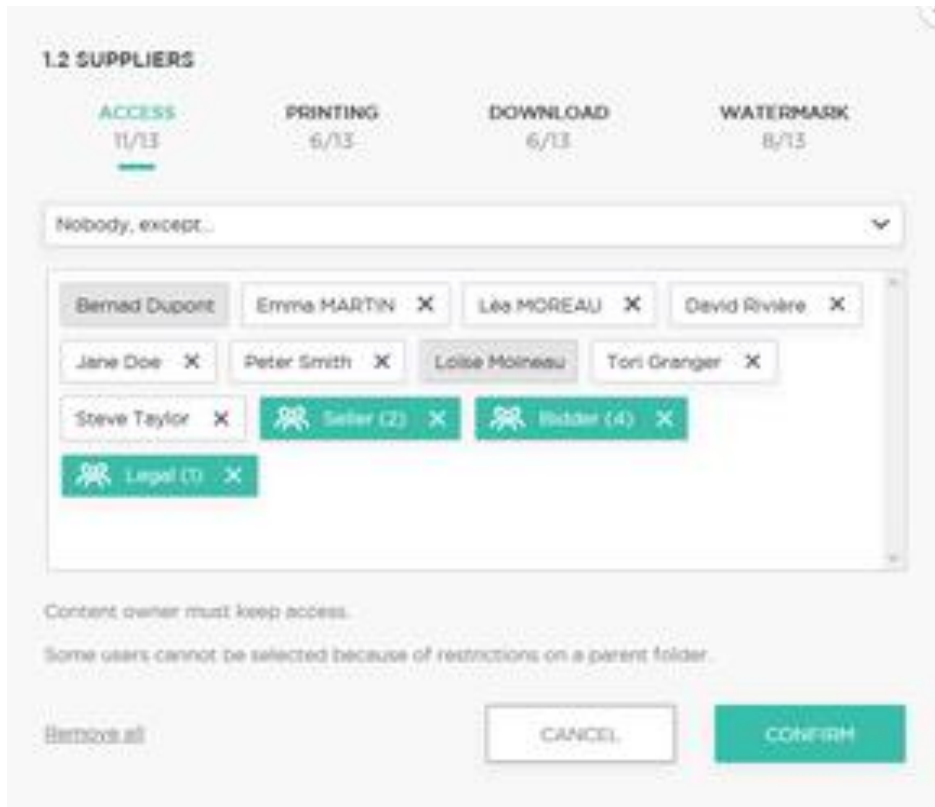


To delete only one document, click on the  button beside the file.

2.6. Permissions

An administrator may grant access rights by clicking on  on the selected folder.

The « Permissions » button  allows you to set parameters on the selected folder like adding or removing users in each right tab. To apply changes to all documents attached to this folder and to the subfolders, click on a tab (Access, Printing, Download or Watermark), select "every body, except..." or "Nobody, except ..." and add users/ teams who are allow to access (or not) that entire folder.





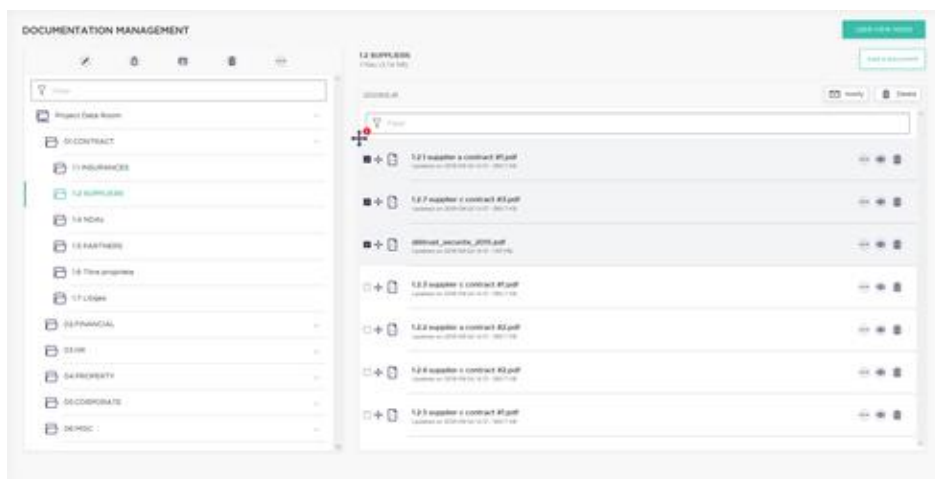
NB: By double clicking on a team name “bubble”, all its users will be listed, allowing you to remove one or more users.

2.7. Move a folder


To move a folder, simply drag and drop it where you want it. To move a folder inside another one, just drop it on the desired folder.

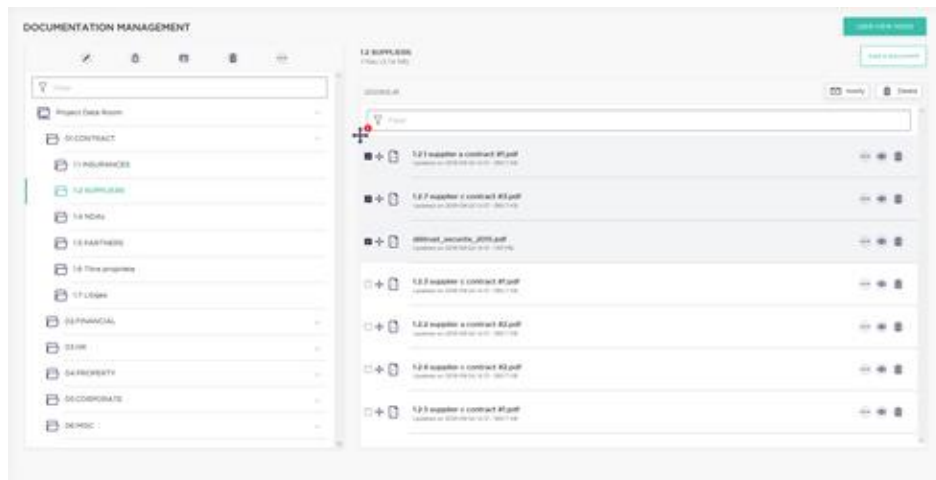
2.8. Move documents

To move documents, click on the  button and drag and drop it where desired. You also can move several documents from a folder at once by checking the boxes to select them, then drag the  button and drop the files where desired.



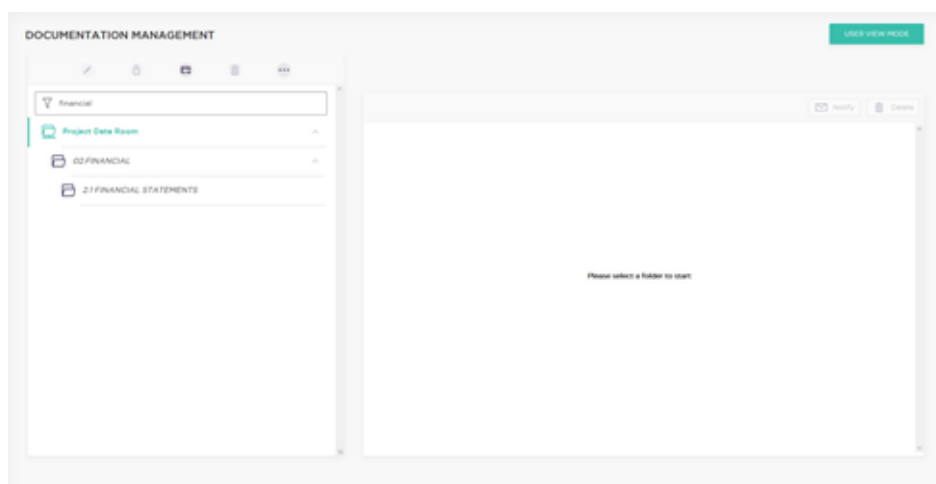
2.9. Notify

An administrator can notify users on documents by checking one or several documents of a folder and click on « Notify »  Notify (top right). Select teams or users to notify in the popup window.

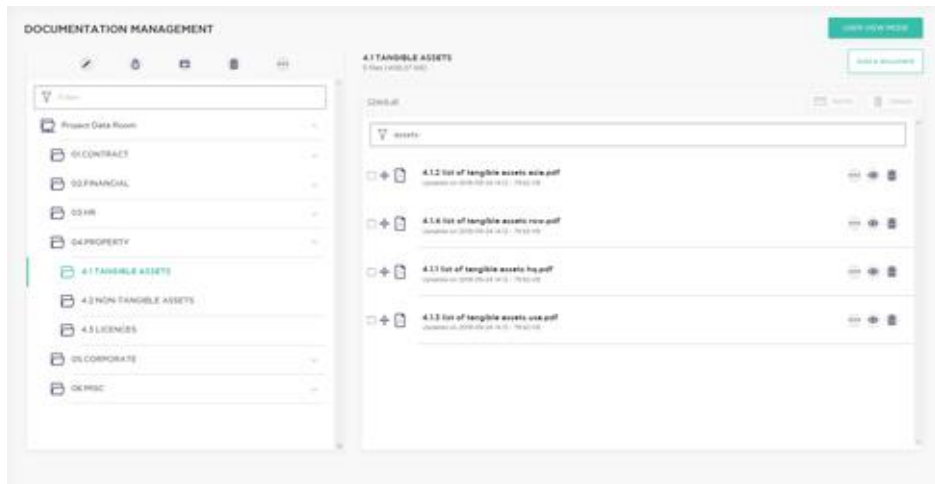


2.10. Search in documentation


It is possible for users and administrators to filter folders by their name to quickly find one.






Likewise, files can be filtered by their name in a folder.





2.11. Actions on documents


To see action buttons on documents, mouse over the  button next to the documents.


The  and  buttons are always visible and allow you to view and delete a document. The following buttons allows administrators to manage files :


 : Manage rights on this file













































 : This button indicates all actions made on this document (views, prints, downloads).

 : Download the document


 : Notify users on this document


 : Ask a question on the document

 : That icon next to the file's name shows to the administrator which user has access to that file and with which right

2.3.2 TAX STATEMENT 2007.PDF					
CA	CHRISTOPHE ANTOINE				
EM	EMMA MARTIN				
LM	LÉA MOREAU				
CM	CHLOÉ MENARD				
JH	JULES HUMEAU				
PS	PETER SMITH				
JG	JÉRÉMY GEORGES				
JD	JEREMY DAMIER				
CA	CÉCILE AVENTURE				
ST	SUSAN TAYLOR				
PS	SELLER				

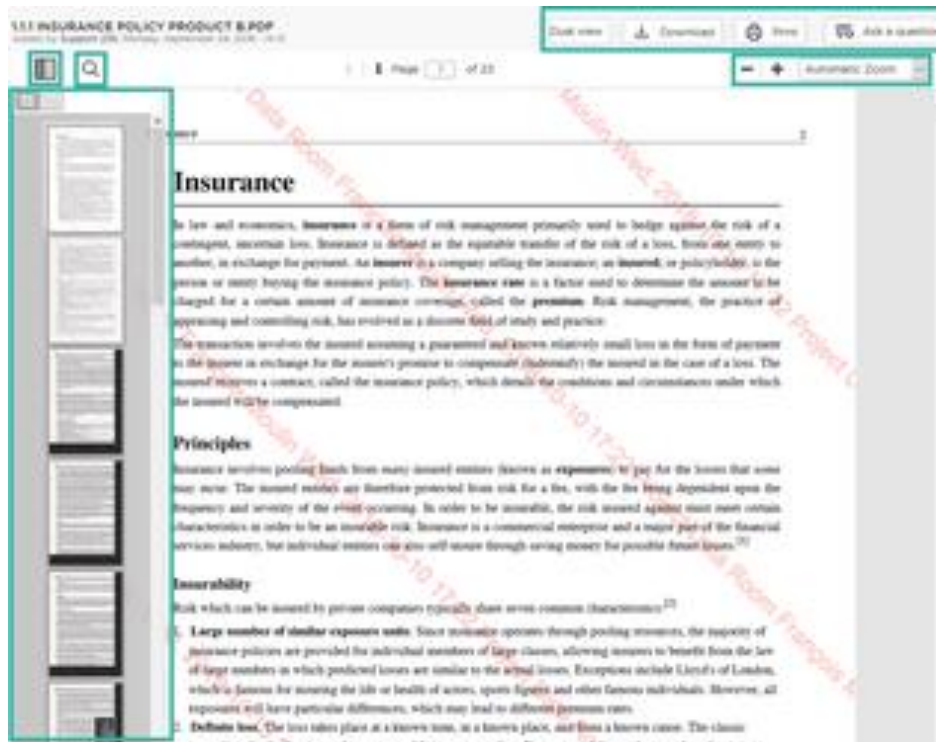
2.12. Read a document

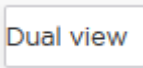
To read a document click on the  icon on the desired document, the file will be open in a new window.



To facilitate reading, you can quickly browse the file by clicking  through thumbnails of the document pages.

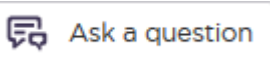
The magnifying glass allows you to search for words in the file except for scanned documents, unless they are scanned using OCR (optical character recognition).

A zoom is also available to ease your reading experience.




The button  allows you to read two documents at the same time.

You can also download and print the document via the buttons  and .

The button  allows users to ask a question regarding the document.

2.13. Note taking

While reading the documents you also can take personal notes. All notes taken on documents are personal. No administrator can read, or access notes taken by users.

- Click anywhere in the file (a yellow post-it is displayed)
- Enter your note
- Save by clicking the  icon.

2.3.2 TAX STATEMENT 2007.PDF
 Added by Support 235, Monday, September 24, 2018 - 14:13

Dual view Download Print Ask a question

Page 1 of 18 Automatic Zoom

tallage, gabel, impost, duty, custom, excise, subsidy, aid, supply, or other name.^[1]

The legal definition and the economic definition of taxes differ in that economists do not consider many transfers to governments to be taxes. For example, some transfers to the public sector are comparable to prices. Examples include tuition at public universities and fees for utilities provided by local governments. Governments also obtain resources by creating money (e.g., printing bills and minting coins), through voluntary gifts (e.g., contributions to public universities and museums), by imposing penalties (e.g., traffic fines), by borrowing, and by confiscating wealth. From the view of economists, a tax is a non-penal, yet compulsory transfer of resources from the private to the public sector levied on a basis of predetermined criteria and without reference to specific benefit received.

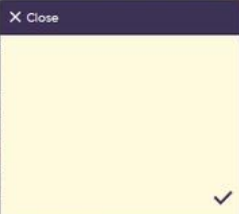
In modern taxation systems, taxes are levied in money, but in-kind and *corvée* taxation are characteristic of traditional or pre-capitalist states and their functional equivalents. The method of taxation and the government expenditure of taxes raised is often highly debated in politics and economics. Tax collection is performed by a government agency such as Canada Revenue Agency, the Internal Revenue Service (IRS) in the United States, or Her Majesty's Revenue and Customs (HMRC) in the UK. When taxes are not fully paid, civil penalties (such as fines or forfeiture) or criminal penalties (such as incarceration)^[2] may be imposed on the non-paying entity or individual.


Purposes and effects


Money provided by taxation have been used by states and their functional equivalents through many functions. Some of these include expenditures on war, the enforcement of law and property, economic infrastructure (roads, legal tender, enforcement of contracts, engineering, and the operation of government itself. Governments also use taxes to fund welfare services. These services can include education systems, health care systems, pensions for the elderly, and public transportation. Energy, water and waste management systems are also common. Modernizing states have also used cash taxes to draw or force reluctant subsistence economies.

Governments use different kinds of taxes and vary the tax rates. This is done to distribute the tax burden among individuals or classes of the population involved in taxable activities, such as business, or to redistribute resources between individuals or classes in the population. Historically, the nobility were supported by taxes on the poor; modern social security systems are intended to support the poor, the disabled, or the retired by taxes on those who are still working. In addition, taxes are applied to fund foreign aid and military ventures, to influence the macroeconomic performance of the economy (the government's strategy for doing this is called its fiscal policy - see also tax exemption), or to modify patterns of consumption or employment within an economy, by making some classes of transaction more or less attractive.

A nation's tax system is often a reflection of its communal values or/and the values of those in power. To create a system of taxation, a nation must make choices regarding the distribution of the tax burden—who will pay taxes and how much they will pay—and how the taxes collected will be spent. In democratic nations where the public elects






To close the note, click on the cross on its top right corner (this will not delete the note). You can reopen it on the left margin by clicking on it. The  button will permanently delete the note. To edit it, click on its content, edit, and save.

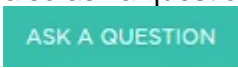
To share a note: Open the note and click on the . Users will be listed in a newly opened window; check the ones you want to share the note with. Recipients will receive an email notification with a direct link to the note taken on the document (after login in the portal).

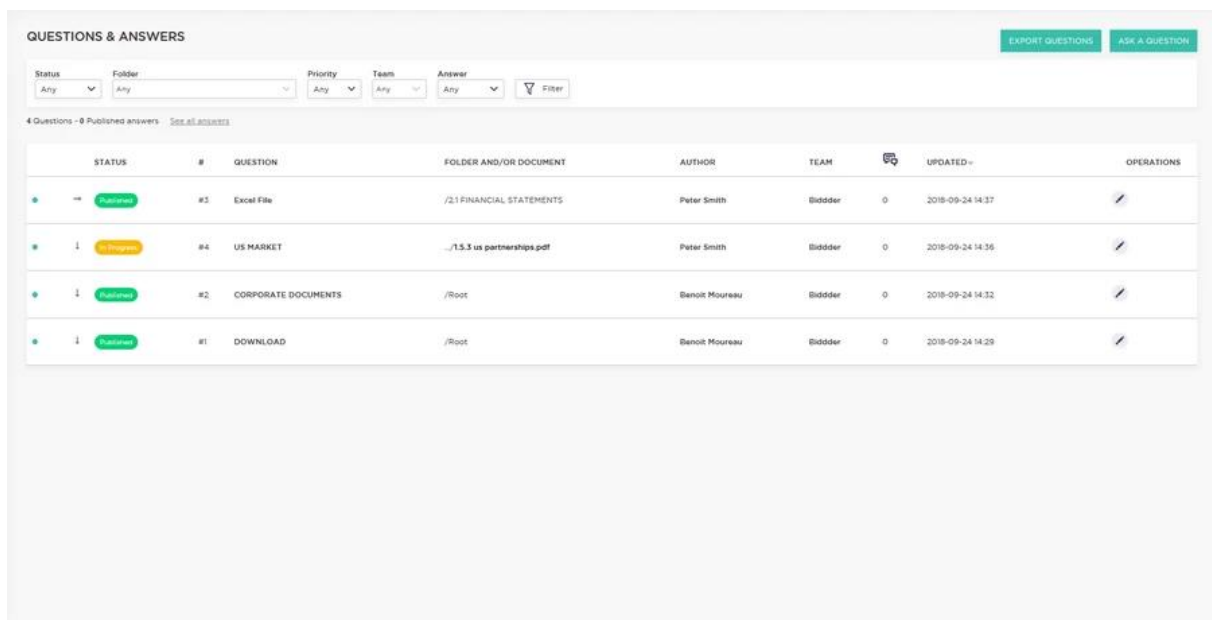
3. QUESTIONS





3.1. Ask a question

Users can ask a question from a document by hovering over the button  and clicking . A window appears and allows the user to ask his question about the chosen document.

The user can also ask a question when reading a file by clicking on the  button and the window opens for the user to enter his question.

The user can also ask a question on a folder through the "Questions" menu and by clicking on the button .



STATUS	#	QUESTION	FOLDER AND/OR DOCUMENT	AUTHOR	TEAM	UPDATED	OPERATIONS
Published	#3	Excel File	/21 FINANCIAL STATEMENTS	Peter Smith	Bidder	2018-09-24 14:37	
In Progress	#4	US MARKET	../1.5.1 us partnerships.pdf	Peter Smith	Bidder	2018-09-24 14:36	
Published	#2	CORPORATE DOCUMENTS	/Root	Benoit Moreau	Bidder	2018-09-24 14:32	
Published	#1	DOWNLOAD	/Root	Benoit Moreau	Bidder	2018-09-24 14:28	

To ask a question about the data room, a user must fill in the following mandatory fields:

- the title of his question,
- priority (low, medium, and high) and
- a status (in progress, published and refused).

When selecting the "In progress" status, a user can send his question as a draft to another member of his team, who has the possibility to validate or refuse the suggested question.

By default, all users can ask a question.

An administrator can only answer a question with the status "Published".

3.2. Answer a question

Only an administrator of the data room can answer a question published by a user of a team.

The administrator clicks on "Add an answer" and a window opens.

In this window, the administrator must fill in the fields of the answer and its status.

He may publish his answer and the user will be notified that his question has been answered.

He can also suggest his answer to another administrator for validation.

He may also refuse to publish an answer.

The user can comment on the response of the administrator and that admin can also reply on those previous comments or answers

QUESTIONS & ANSWERS EXPORT QUESTIONS ASK A QUESTION

Status: Any Folder: Any Priority: Any Team: Any Answer: Any Filter

4 Questions - 0 Published answers [See all answers](#)

STATUS	#	QUESTION	FOLDER AND/OR DOCUMENT	AUTHOR	TEAM	UPDATED	OPERATIONS
1 Published	#3	Excel File	/21 FINANCIAL STATEMENTS	Peter Smith	Bidder	0 2018-09-24 14:17	
1 Not Published	#4	US MARKET	../15.3 us partnerships.pdf	Peter Smith	Bidder	0 2018-09-24 14:36	
1 Published	#2	CORPORATE DOCUMENTS	/Root	Benoit Moureau	Bidder	0 2018-09-24 14:32	
1 Published	#1	DOWNLOAD	/Root	Benoit Moureau	Bidder	0 2018-09-24 14:29	

4. ANNOTATIONS


The annotations tab lists all note (written by hand or in post-it format) taken on the portal, from all rooms you have access to.

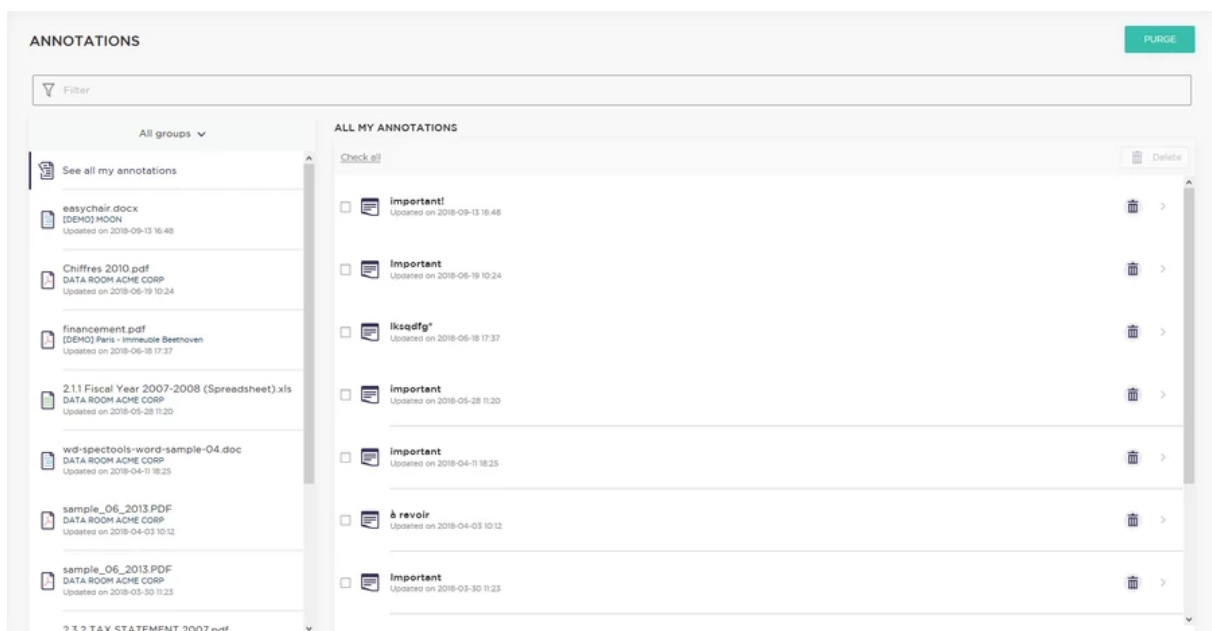
You will find, on the left side, all the documents on which notes were taken. All notes taken will be on the right side of your screen.

By clicking on the note, you will be redirected exactly where the note was taken on the document.

A filter is available to search for a note.

By clicking on a document, all associated notes will be displayed on the right side of your screen.

The « Purge »  button (top right corner) deletes all notes taken on the portal. This action is final. You will need to type in the phrase mentioned and then confirm.



The screenshot shows the 'ANNOTATIONS' interface. At the top right, there is a green 'PURGE' button. Below it is a search bar labeled 'Filter'. The interface is split into two main sections. On the left, under 'All groups', there is a list of documents with their names and update times. On the right, under 'ALL MY ANNOTATIONS', there is a list of notes with their content, update times, and a 'Delete' button for each note.

Document Name	Update Time	Note Content	Note Update Time
easychair.docx (DEMO) MOON	Updated on 2018-09-13 16:45	important!	Updated on 2018-09-13 16:48
Chiffres 2010.pdf DATA ROOM ACHE CORP	Updated on 2018-06-19 10:24	important	Updated on 2018-06-19 10:24
financement.pdf (DEMO) Paris - Immeuble Beethoven	Updated on 2018-06-18 17:37	lksqdfg*	Updated on 2018-06-18 17:37
2.11 Fiscal Year 2007-2008 (Spreadsheet).xls DATA ROOM ACHE CORP	Updated on 2018-05-28 11:20	important	Updated on 2018-05-28 11:20
WS-tpectools-word-sample-04.doc DATA ROOM ACHE CORP	Updated on 2018-04-11 18:25	important	Updated on 2018-04-11 18:25
sample_06_2013.PDF DATA ROOM ACHE CORP	Updated on 2018-04-03 10:12	à revoir	Updated on 2018-04-03 10:12
sample_06_2013.PDF DATA ROOM ACHE CORP	Updated on 2018-03-30 11:23	important	Updated on 2018-03-30 11:23

5. STATISTICS

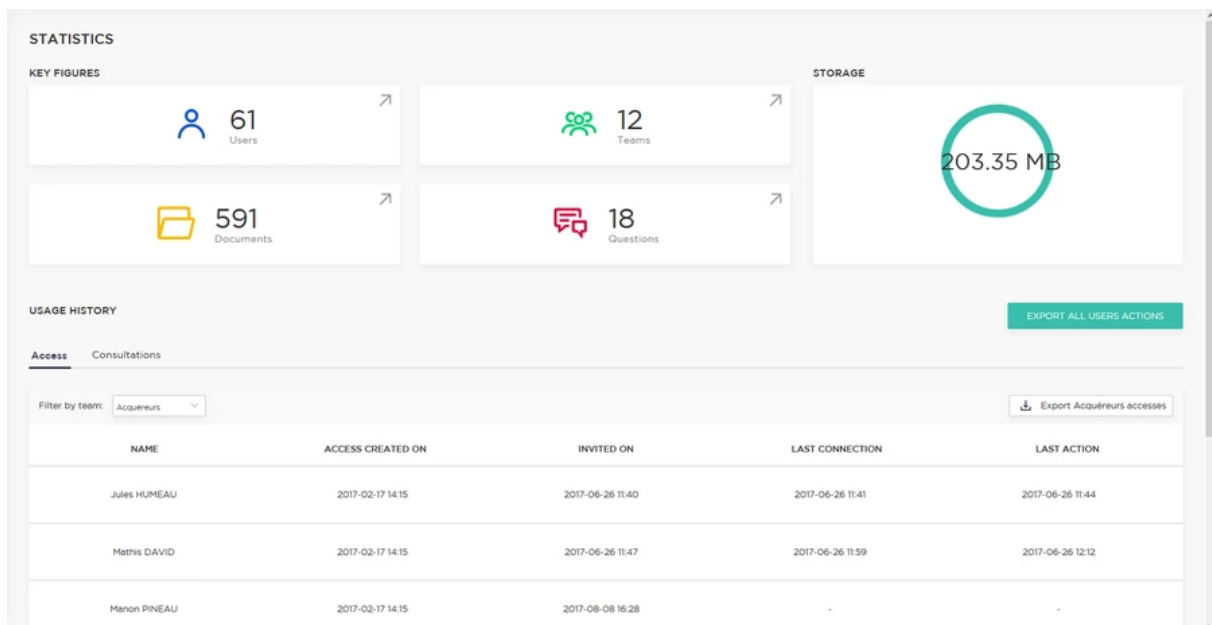
In the statistics, the administrator has global information about the activity on the data room and the activity history.

This section is divided into two parts: the statistics and the use of the data room.

Statistics

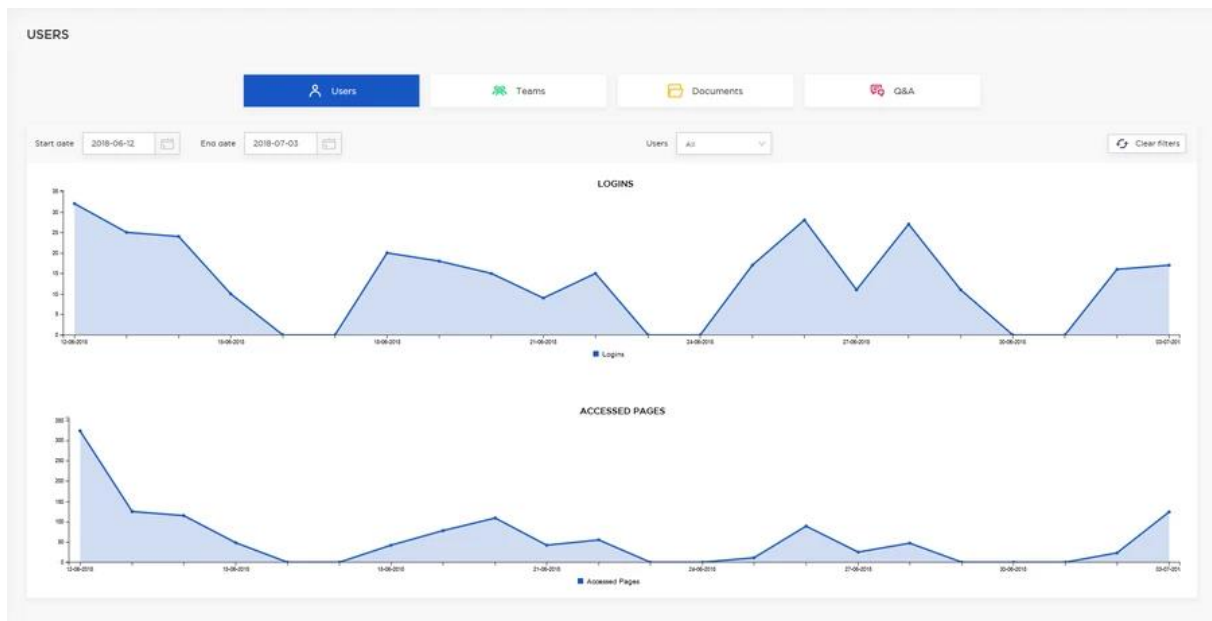
This part gathers general information about the data room:

- the number of users,
- the number of teams,
- the number of documents,
- the number of questions asked and
- the data storage used.



Users

On this page, the administrator can view the connections and the number of pages visited by all users, users of a team, or a specific user on a date range he chooses.



Teams

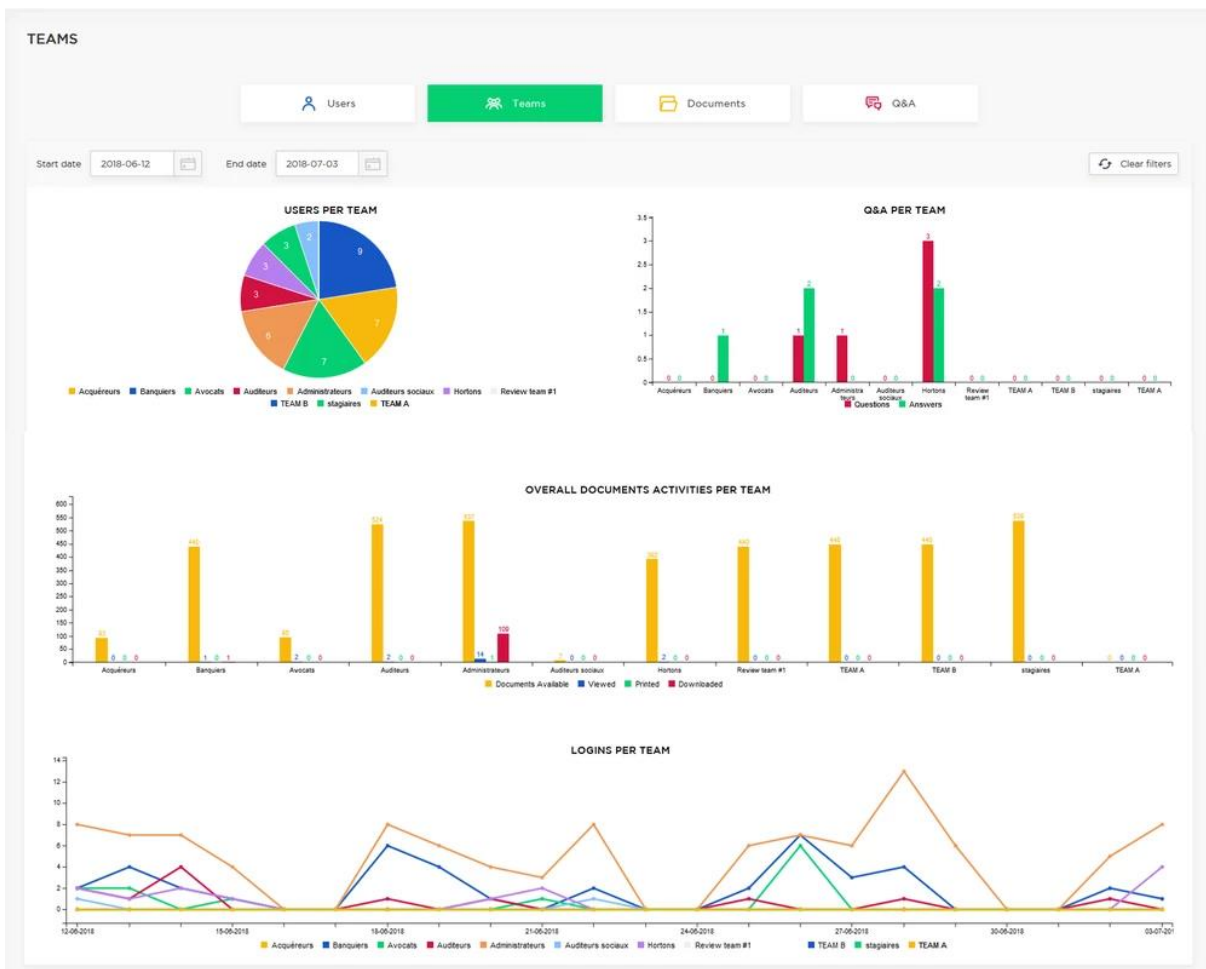
In this section, the administrator has information about the activity of the teams on the data room.

The pie chart represents the number of teams and the number of members per team.

The graphs are for Team Questions and Answers, Team Document Actions, and Team Connections.

The actions on the documents include the number of documents available for this team, the number of documents seen, printed or downloaded by team.

The last graph represents team connections and highlights teams connecting the most to the data room.

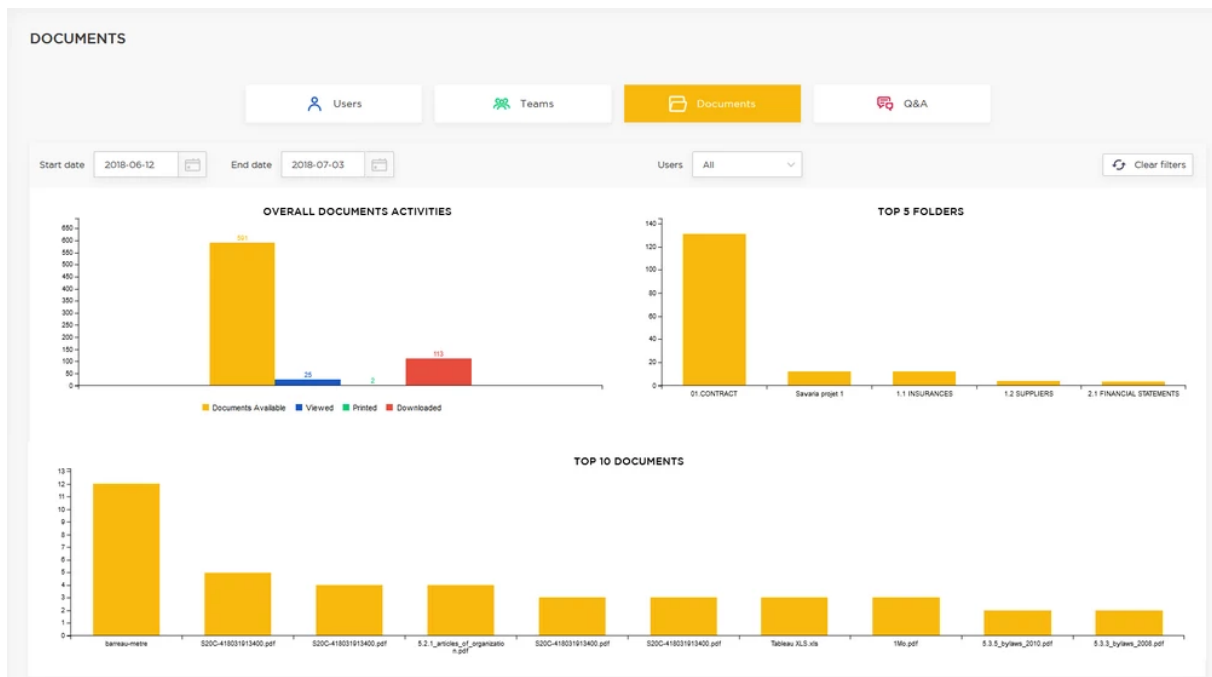


Documents

In this part, the administrator has information on the actions generally done on the data room by all the users, the users of a team or a particular user on a date interval that he chooses.

He also has two graphs that show him the Top 5 or Top 10 most consulted folders according to the filters made.

The administrator can reset the filters and set new parameters to display new results.

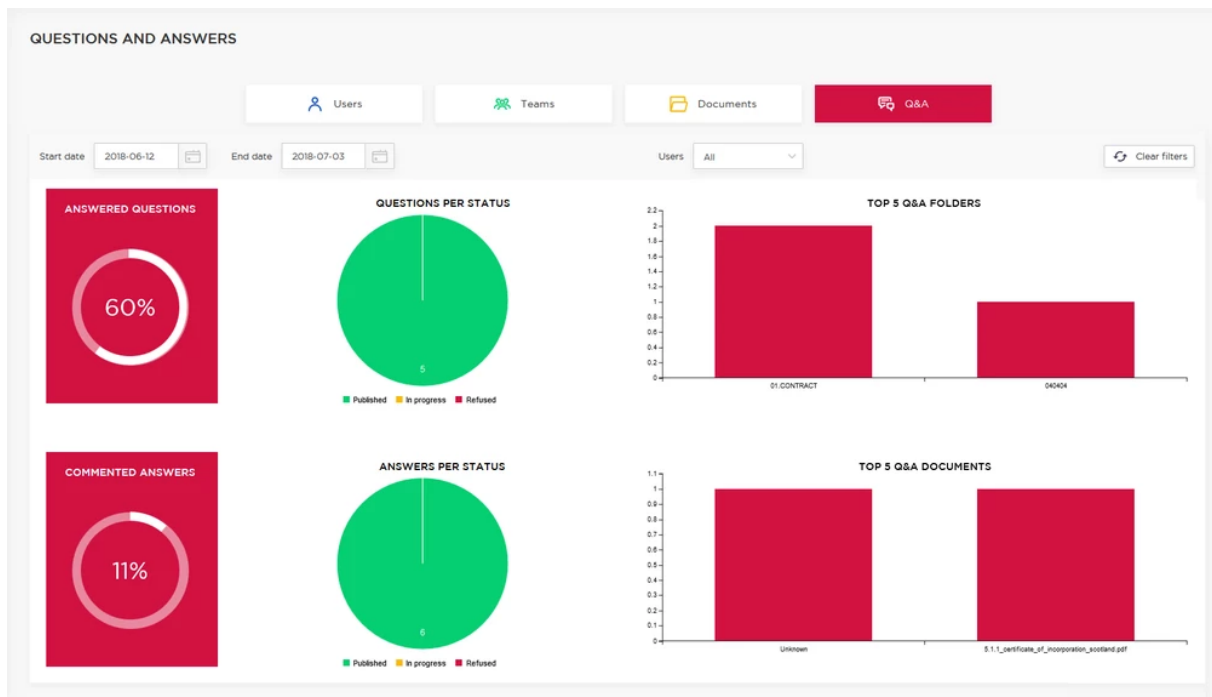


Questions

On the Questions & Answers tab, the administrator can filter by all users, teams, or a specific user.

The graphs displayed on this page are divided into two parts: questions and answers. They highlight :

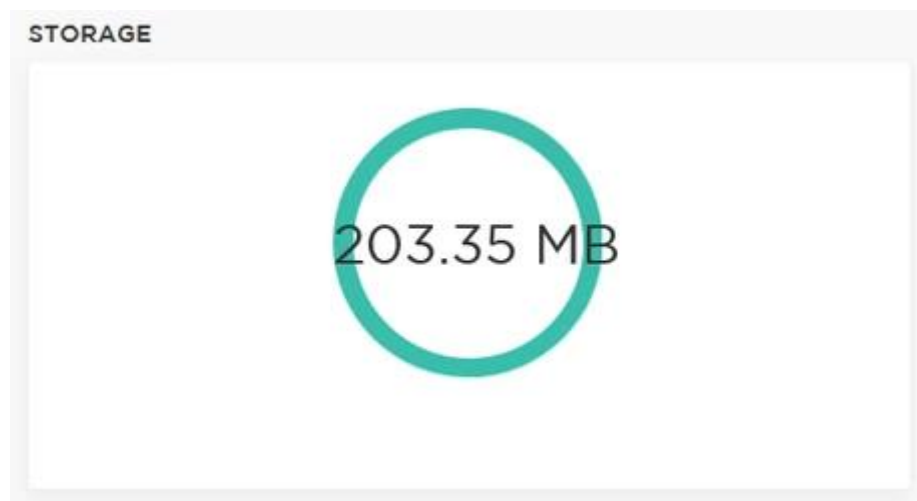
- the percentage of answered questions,
- the number of questions according to their status (published, in progress or refused),
- the Top 5 folders about which there are the most questions asked,
- the percentage of commented answers,
- the number of answers according to their status (published, in progress or refused) and
- the Top 5 documents whose questions are on these files.



NB: If the Q & A module is not enabled, this tab will not be displayed.

Data storage

The storage indicates the overall size of the documents posted on the data room.



Usage history

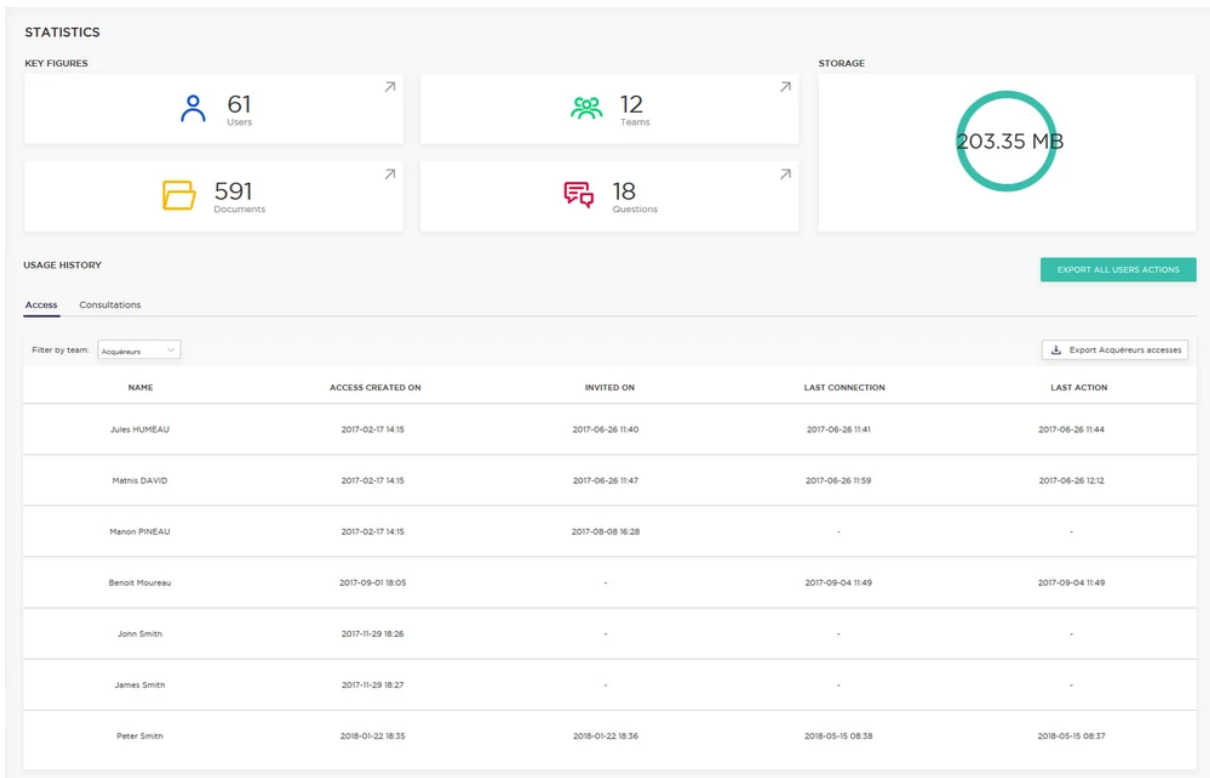
In this menu, you have the usage history divided into two tabs: Access and Consultations.

Access

In the Access tab, the administrator sees information about the connectivity of their members (invitation date, last login or last action).

It has the possibility to download the displayed data of the chosen team by clicking on the button "Export".

The "Export all connections" button allows you to download all the connection data of all the teams in our platform.



The screenshot shows the 'STATISTICS' section with 'KEY FIGURES' and 'STORAGE' metrics. Below is the 'USAGE HISTORY' section, currently displaying the 'Access' tab for the 'Acquéreurs' team. A table lists user access details, and an 'EXPORT ALL USERS ACTIONS' button is visible in the top right of the usage history area.

NAME	ACCESS CREATED ON	INVITED ON	LAST CONNECTION	LAST ACTION
Jules HUMEAU	2017-02-17 14:15	2017-06-26 11:40	2017-06-26 11:41	2017-06-26 11:44
Matis DAVID	2017-02-17 14:15	2017-06-26 11:47	2017-06-26 11:59	2017-06-26 12:12
Manon PINEAU	2017-02-17 14:15	2017-08-08 16:28	-	-
Benoit Moureau	2017-09-01 18:05	-	2017-09-04 11:49	2017-09-04 11:49
John Smith	2017-11-29 18:26	-	-	-
James Smith	2017-11-29 18:27	-	-	-
Peter Smith	2018-01-22 18:35	2018-01-22 18:36	2018-05-15 08:38	2018-05-15 08:37

Consultations


In the Consultations tab, the information displayed concerns the members of the chosen team and indicates the documents available for this team, the number of documents seen per user, its percentage, the number of questions viewed and asked on the data room per member .

It has the possibility to download the displayed data of the chosen team by clicking on the button "Export".


The button "Export all user actions" allows you to download all the data concerning all the documents consulted by all the teams in the data room.

STATISTICS


KEY FIGURES




61
Users



12
Teams




591
Documents



18
Questions

STORAGE



203.35 MB

USAGE HISTORY

[EXPORT ALL USERS ACTIONS](#)

Access

[Consultations](#)

Filter by team: Acquereurs

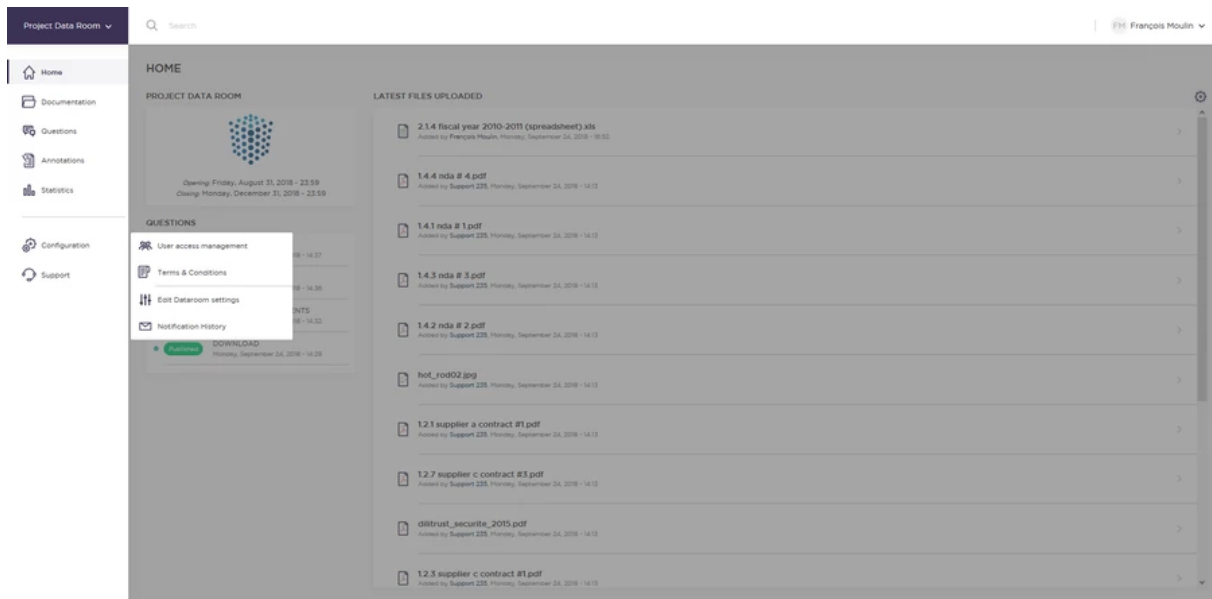
[Export Acquereurs consultations](#)

NAME	AVAILABLE DOCUMENTS	DOCUMENTS VIEWED	PERCENTAGE VIEWED	QUESTIONS VIEWED	QUESTIONS ASKED
Jules HUMEAU	567	22	3.9%	0	0
Mathis DAVID	567	18	3.2%	0	0
Manon PINEAU	567	0	0%	0	0
Benoit Moureau	567	0	0%	0	0
John Smith	567	0	0%	0	0
James Smith	567	0	0%	0	0
Peter Smith	567	2	0.4%	0	0

6. CONFIGURATION

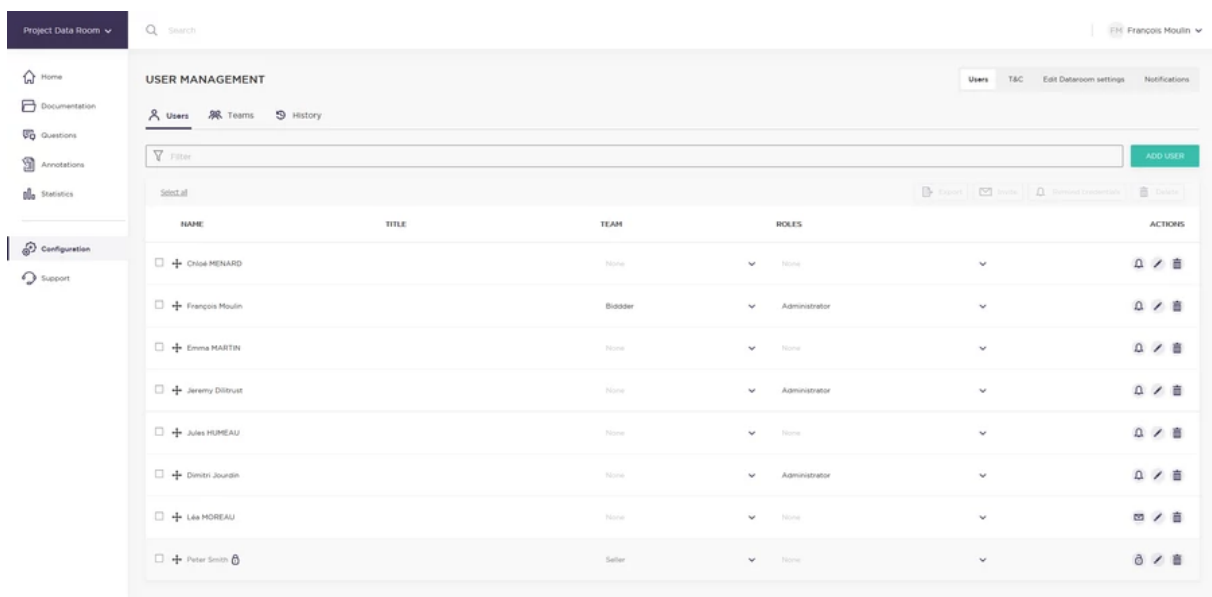
This section is only available for administrators. It includes:

- User access management
- Permissions
- Terms & Conditions
- Edit Data
- Notification history

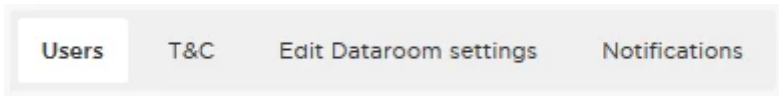


6.1. User access management

The user management access page displays the user list, all teams, and user's entry and exit history.

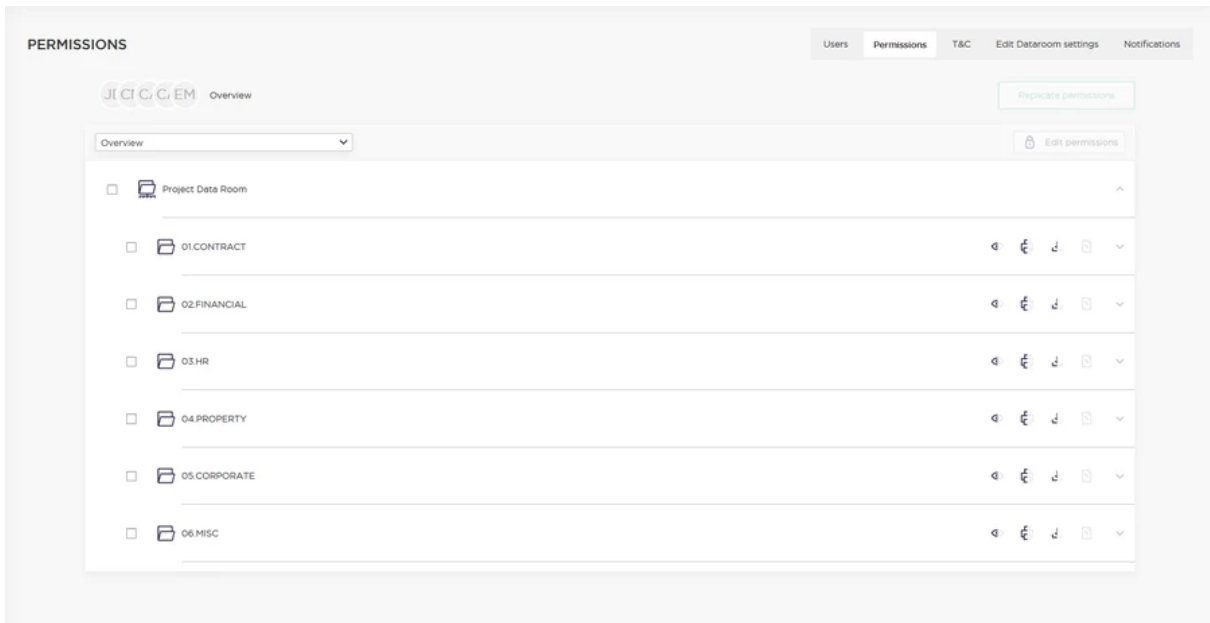


You can also easily access other configuration sections with the top right buttons.



6.1.1. Permissions

Here, the administrator can see and set the permissions for each folder and file, by user or team.



To view the permissions set on a folder or file:

By default, the view is set on overview, the administrator can change it to user or team with the dropdown menu on the top left corner.

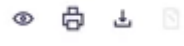
The overview shows for each folders or files the right that has been set. Next to each username you will be able to read the icon accordingly (view, print, download or watermark).


Each icon could be fully filled or partially.

When an icon (view, print, download or watermark) is totally filled, it means that every user can have access to the folder or file.

If the icon is partially filled, that means that only some users have access to it.

When the icon is empty, nobody has access to it.

For example: When you see icons like this next to a folder , the rights are all documents in this folder are available in viewing, printing and downloading. However, the watermark icon is empty, that means that all documents will not have the watermark.

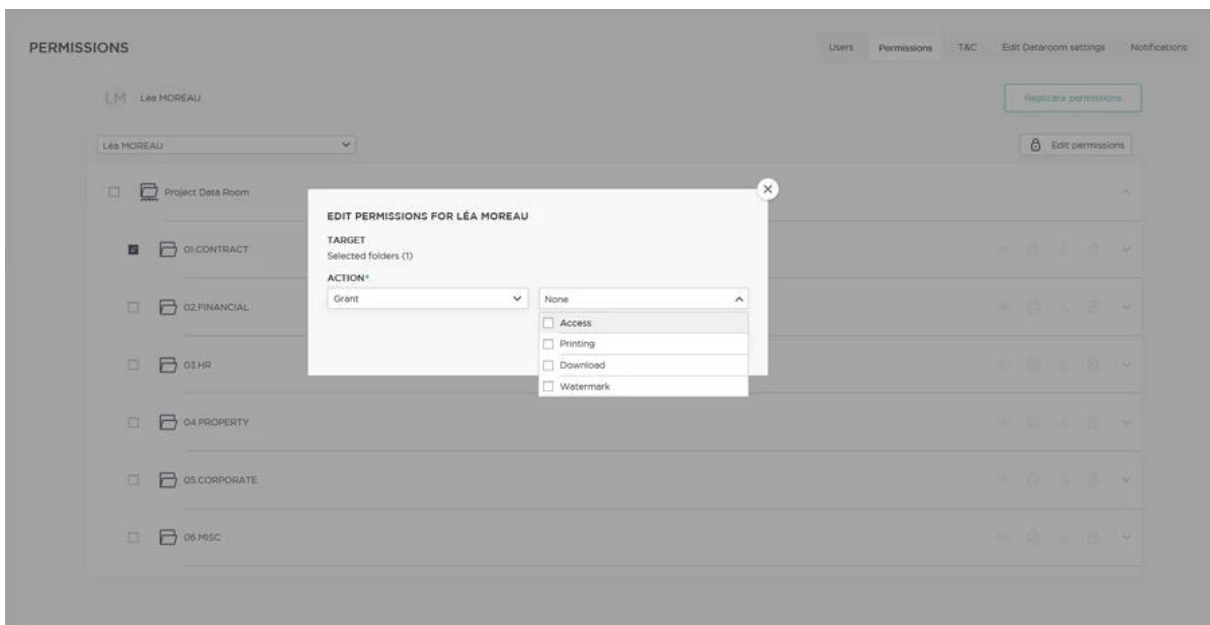
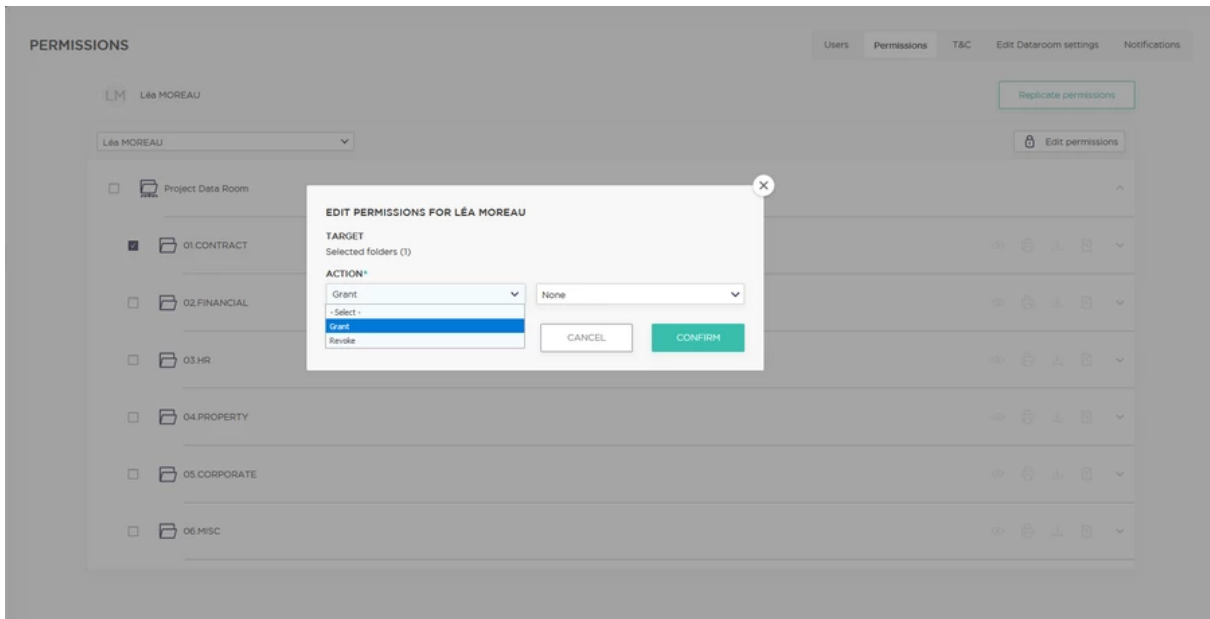
By clicking on those icons (view, print, download or watermark) , the administrator can see the detailed list of all users with their access rights set for that folder or file.

01.CONTRACT					
CA	CHRISTOPHE ANTOINE				
EM	EMMA MARTIN				
LM	LÉA MOREAU				
CM	CHLOÉ MENARD				
JH	JULES HUMEAU				
PS	PETER SMITH				
JG	JÉRÉMY GEORGES				
JD	JEREMY DAMIER				
CA	CÉCILE AVENTURE				
ST	SUSAN TAYLOR				
PS	SELLER				

The administrator can also set permissions for each user or team.

To set rights, the administrator needs to choose the user or the team on the list (top left corner).

Once he selected the right user or team, he needs to choose which folder or document he wants to grant or revoke access to. To do so the admin needs to click on "Edit permissions". A popup windows will appear, he chooses which action he wants grant or revoke, then he selects which permissions he wants to grant or revoke (view, print, download or watermark).



By selecting several folders or files and choosing to grant access, the administrator gives access to these selected elements including the subfolders and all the files included.

By selecting several folders or documents and choose revoking, he removes the access rights to these elements.

6.1.2. Users

In the user access management section, all users from the room are listed. For each user, you will see his status, name, title in the dataroom, his team, his role and actions permitted on this user.

USER MANAGEMENT

Users T&C Edit Dataroom settings Notifications

Users Teams History

Filter

ADD USER

Select all

NAME	TITLE	TEAM	ROLES	ACTIONS
<input type="checkbox"/> + Chloé MENARD		None	None	
<input type="checkbox"/> + François Moulin		Biosoper	Administrator	
<input type="checkbox"/> + Emma MARTIN		None	None	
<input type="checkbox"/> + Jules HUMEAU		None	None	
<input type="checkbox"/> + Léa MOREAU		None	None	
<input type="checkbox"/> + Peter Smith		Seller	None	

Adding users

To add a user, click on « Add user », there are two ways to add users on the data room: "from email address(es)" or "from an Excel file".

By adding users with email addresses, enter the email addresses of the users, choose the administrator role in the drop-down list if you want to assign this role and assign it to a team (if existing and if you want). Users can always be added to teams later. A user must be a member of a team to be able to ask questions on the data room, given that the Questions and Answers module has been activated.

ADD USERS

Choose how you want to add new users:

Using email(s) address(es) ▾

EMAIL ADDRESS(ES)*

peter.smith@dilitrust.com X

DATAROOM(S) ACCESS

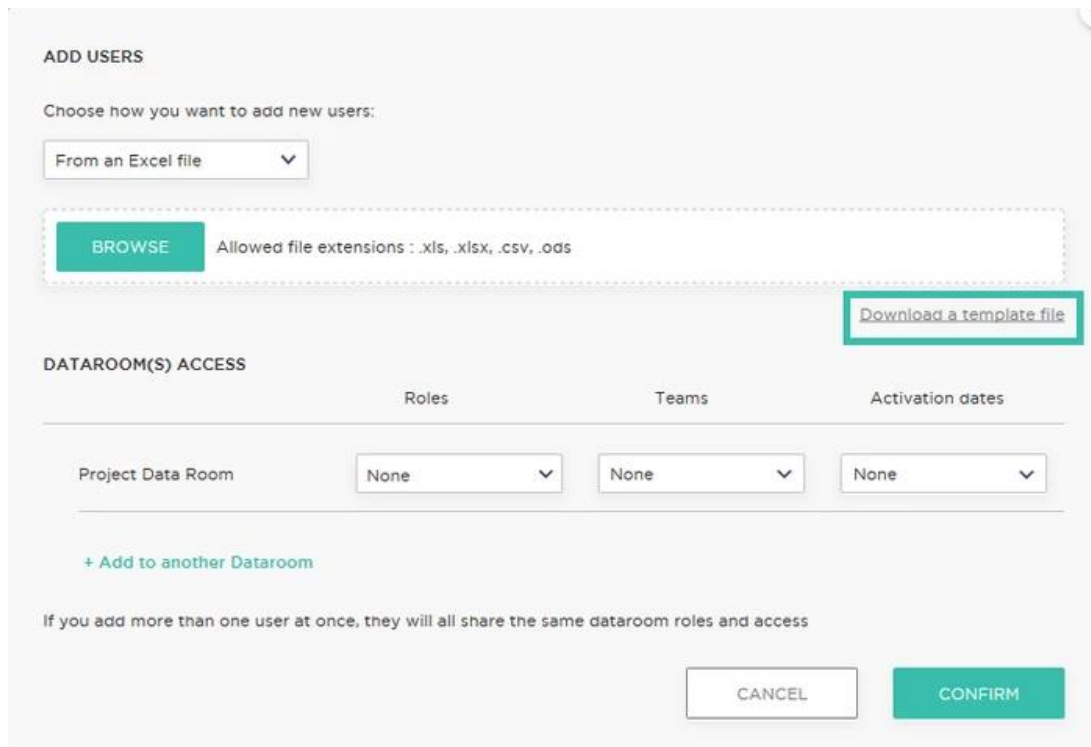
	Roles	Teams	Activation dates
Project Data Room	None ▾	None ▾	None ▾

+ Add to another Dataroom

If you add more than one user at once, they will all share the same dataroom roles and access

CANCEL CONFIRM

By adding the users from the Excel file, in this document the fields "email", "first name" and "name" must be filled.




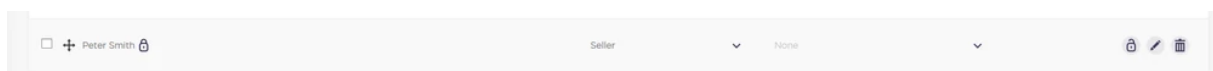
If the person you want to add to your data room already has a user account, it is recommended to use the existing email for his portal. This way, once added, a message appears on the page telling you that this user already has an account on the platform and you simply must confirm to add it in the data room. An email notification for the addition to a data room will be sent to him.

If the user does not already have an account, you will be redirected to an account creating page; Enter his first and last name and confirm his email address. We highly recommend that you notify each created user by checking the matching box upon creation. You will then be able to assign him a team (if any), activate the two-factor authentication, select the language, the time zone and verify what dataroom he is member of with what role.

New users will be added to the user list in « Access right management tab » of this room.


If the « Notify user » box was not checked upon the account creation, a lock will be displayed next to this username, which means that his account is locked. To unlock him click on the


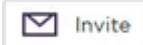
 button in the “Action” column, the user will be notified. Once unlocked the lock icon will disappear.




If you need to send an email invitation to the new user, you will need to click on the icon.

You can assign or remove administrator role to users by clicking on and checking or not the administrator box.

The  button allows you to remove the user from the room.

For users to access the room, an invitation must be sent. To invite users, click on . To invite several users at once, select them by checking the matching boxes then click  on the top right.

If a user forgot his password, you will be able to send him a link to reset a new one with the  button.

Users can also reset their password by browsing the <https://dataroom-eu.dilitrust.com> website, then selecting « Forgotten password? » and confirm.

The  allows you to search for a user.

To increase security and access to the DiliTrust DataRoom portal you can activate the two-factor authentication via SMS for users (administrators included).

When connecting to the portal you will enter your email address and password, if the information provided is correct you will receive a 6 characters code (numbers and letters) on your mobile phone that you will have to enter to login.

The SMS authentication configuration can be done when creating or modifying a user account.

If the two-factor authentication via SMS is enabled:

In the user creation form, two new fields will appear.

Enable two factor authentication for this user

TFA PHONE NUMBER *

For France the area code is 33 and for North America, it is 1. Then enter the number without space or dashes.

Example 1: +15141234567

Example 2: +33611223344

Interval between 2 TFA processes :

You can set the interval between which the TFA will be disabled. You can choose to disable the TFA for 15 min, 1 hour, 1 day, 3 days or a week.

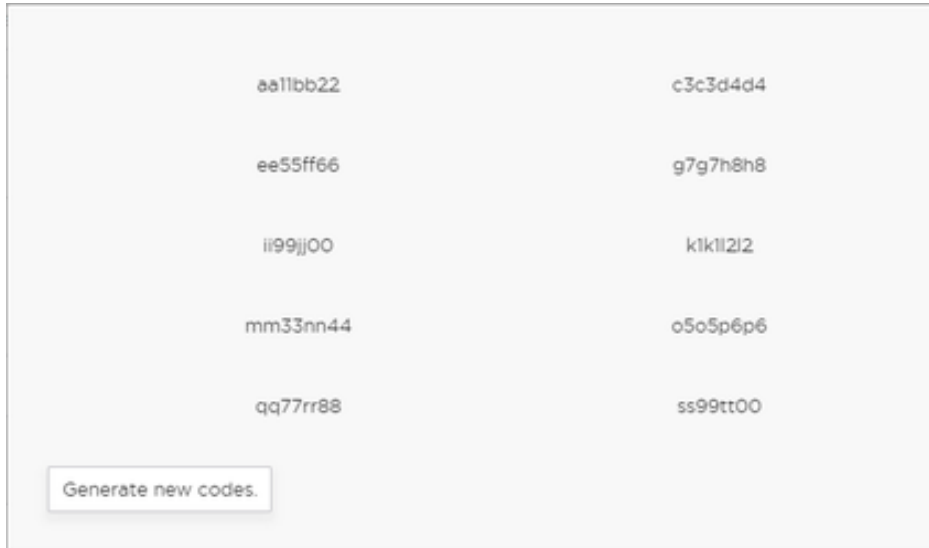
Backup codes :

Emergency codes allow you to log into the portal in case you do not receive the code on your phone.

By going to your profile ("View My Profile" and then "Edit"), in the "Two Factor

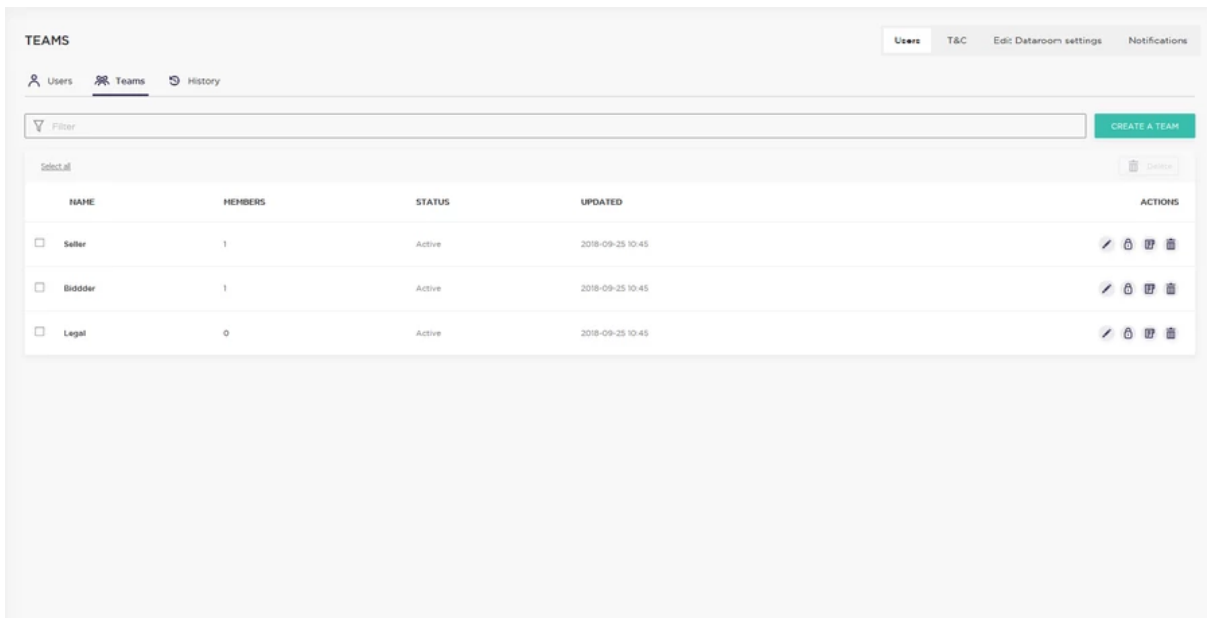
[See my recovery codes](#)

Authentication" section, the button gives you access to your ten backup codes. You will first need to enter your password and a window will display your ten backup codes.



6.1.3. Teams

In the « Teams » section, all teams created on the room are listed. In a team, administrators can add users and manage their access rights to documents by room.



To Add a team, click on the « Create a team » [CREATE A TEAM](#) button, type in the team's name, its status (active/inactive), choose users to add to the team, then choose the watermark settings.

CREATE A TEAM

TITLE*

Bidder #2

STATUS

Active ▾

MEMBERS

Léa MOREAU ✕ Emma MARTIN ✕

Only users that are not already in another team in this Dataroom can be added.

WATERMARK SETTINGS

Customize the watermark

Notify users when new documents have been added in the last 24 hours

CANCEL CONFIRM

For the watermark setting, select "Yes" in the "Customize the Watermark" section, enter either a text or one or more proposed tags spaced from each other. Choose a font size and the watermark color on documents.

EDIT A TEAM

TITLE*

Seller

STATUS

Active ▾

MEMBERS

Peter Smith ✕



Only users that are not already in another team in this Dataroom can be added.

WATERMARK SETTINGS

Customize the watermark

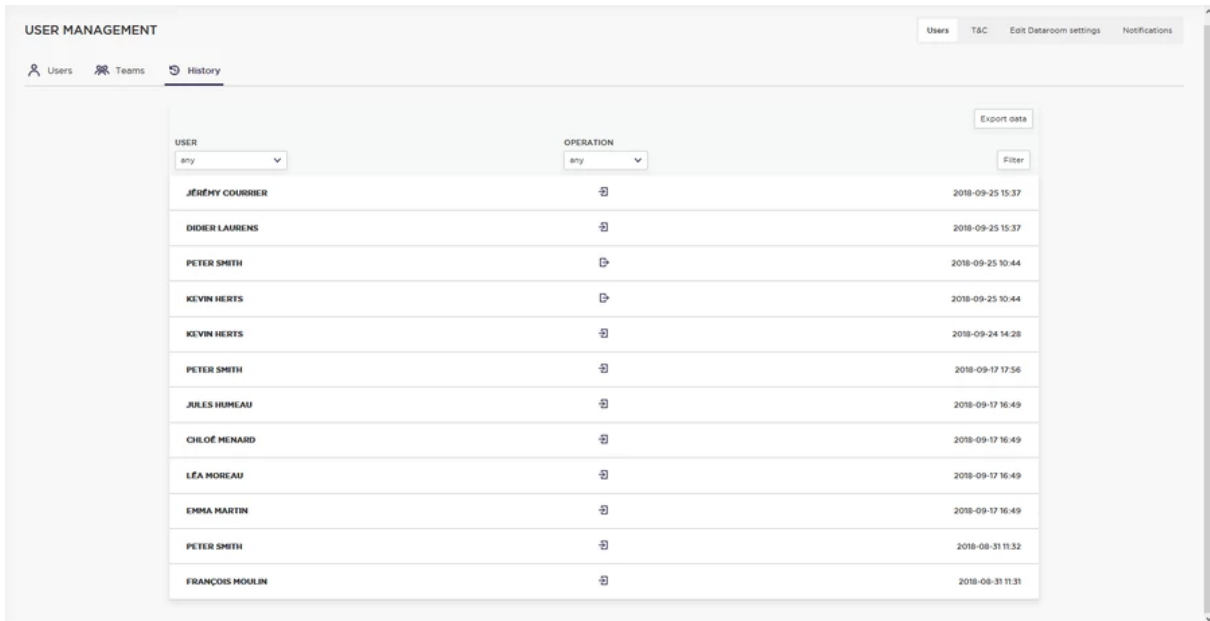
Notify users when new documents have been added in the last 24 hours

CANCEL CONFIRM

To edit a team, select the  button. A window will open allowing you to edit all the fields presented during the team creation. You can add or remove users from this window. Select « Confirm »  to save your changes.

6.1.4. History

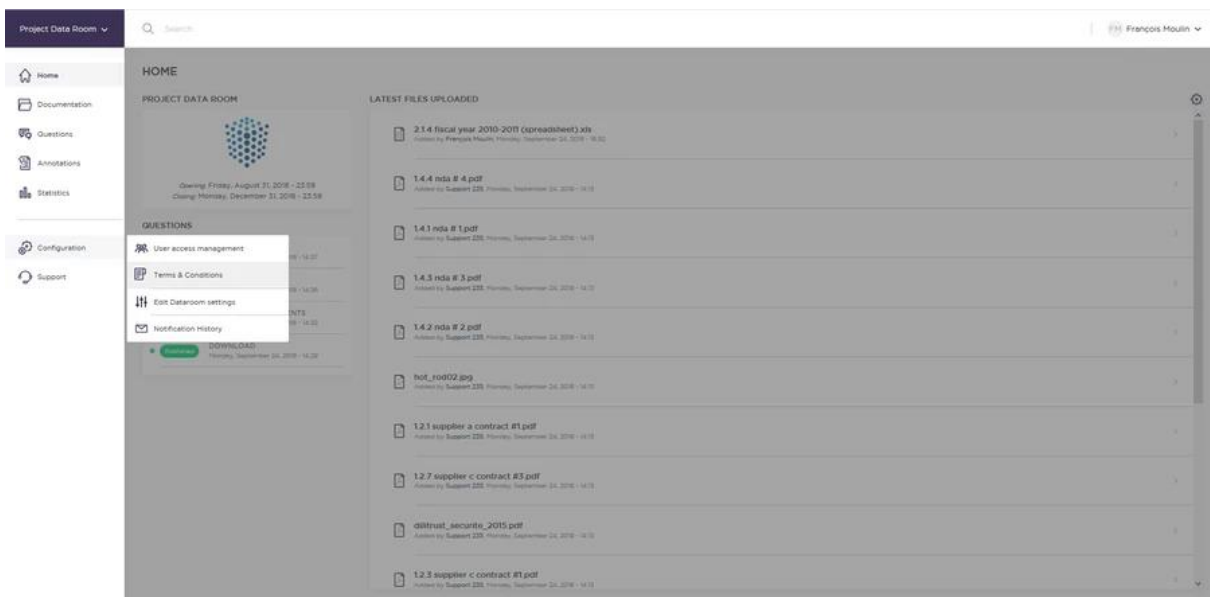
The « history » tab lists all users who accessed or left the room (entry or exit). You will be able to sort by users or operations to have information on these actions' dates. All data can be exported by selecting "Export data".



USER	OPERATION	DATE
JÉRÉMY COURBIER	[icon]	2018-09-25 15:37
DIDER LAURENS	[icon]	2018-09-25 15:37
PETER SMITH	[icon]	2018-09-25 10:44
KEVIN HERES	[icon]	2018-09-25 10:44
KEVIN HERES	[icon]	2018-09-24 14:28
PETER SMITH	[icon]	2018-09-17 17:56
JULES HUMEAU	[icon]	2018-09-17 16:49
CHLOÉ MENARD	[icon]	2018-09-17 16:49
LÉA MOREAU	[icon]	2018-09-17 16:49
EMMA MARTIN	[icon]	2018-09-17 16:49
PETER SMITH	[icon]	2018-08-31 11:32
FRANÇOIS MOULIN	[icon]	2018-08-31 11:31

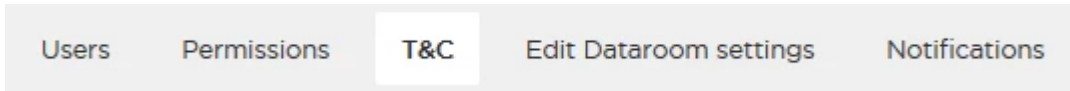
6.2. Terms & Conditions

To access the Terms & Conditions menu, click on "Configuration" and then on "Terms & Conditions".




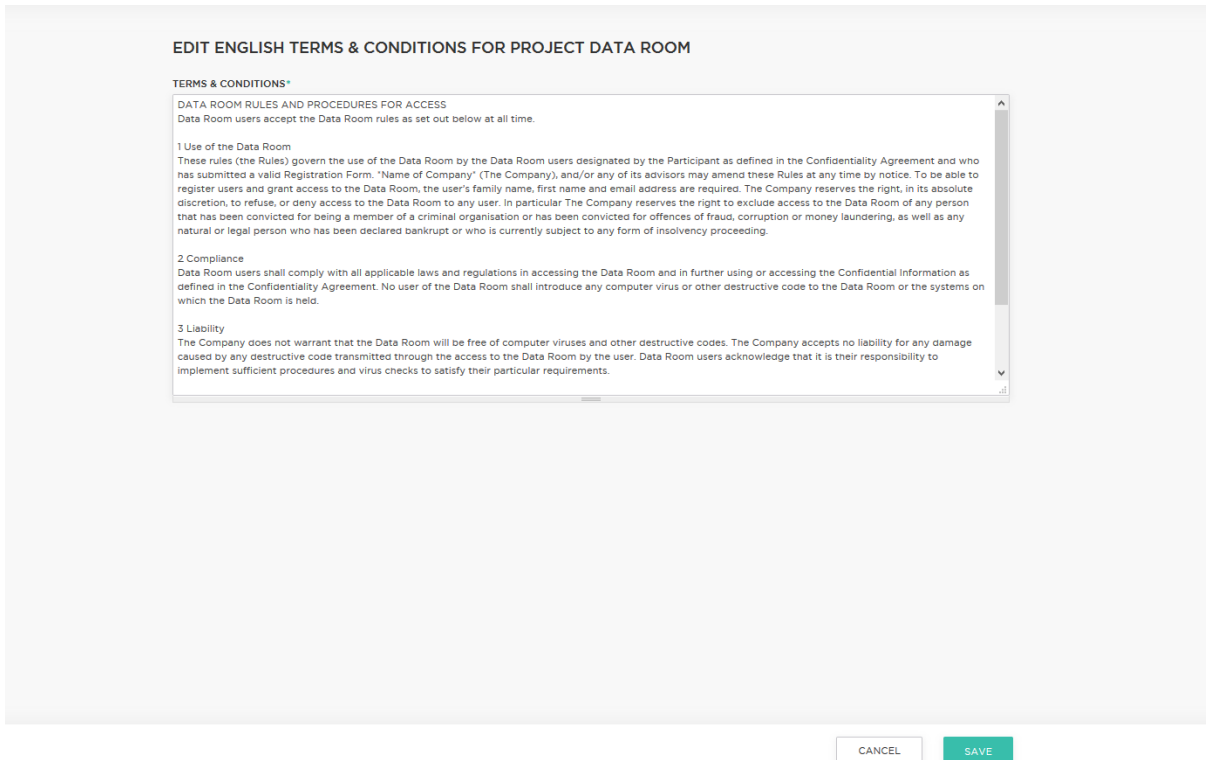
The screenshot shows the 'Project Data Room' interface. On the left, a navigation sidebar includes 'Home', 'Documentation', 'Questions', 'Annotations', 'Statistics', 'Configuration', and 'Support'. The 'Configuration' menu is open, showing options: 'User access management', 'Terms & Conditions', 'Edit Dataroom settings', and 'Notification History'. The 'Terms & Conditions' option is highlighted. The main content area shows 'HOME' with 'PROJECT DATA ROOM' information and a list of 'LATEST FILES UPLOADED'.

The Terms & Conditions are also accessible from the banner at the top right.




In this part, you can add or modify the disclaimer that users will need to accept at each of their login in order to access the Data Room.

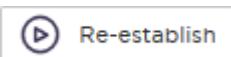
To add Terms & Conditions, click on the  button and add the conditions of use on this page.



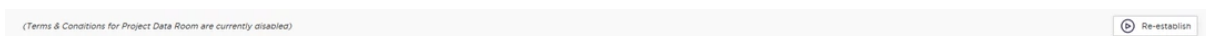
Save your configuration.

Once the Terms & Conditions have been defined, the button  appears at the top right (above "Actions"). This one allows the administrator to suspend the disclaimer.

That is, users will no longer have to accept terms of use.

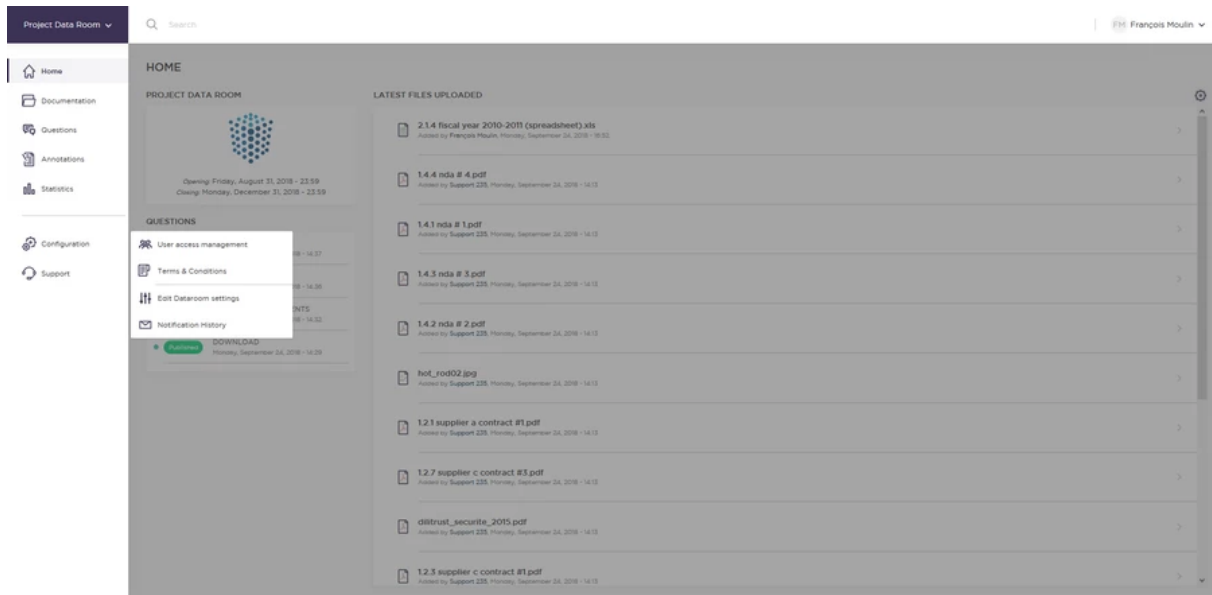
When the Terms & Conditions are deactivated, the button  appears and gives the possibility of reactivating the Terms & Conditions.

The mention "(The conditions of use for [name of the data room] are currently suspended)" above the language.



6.3. Edit Dataroom settings

You can access the Data Room settings by going to "Configuration" and then clicking on the "Edit Dataroom Settings" tab.

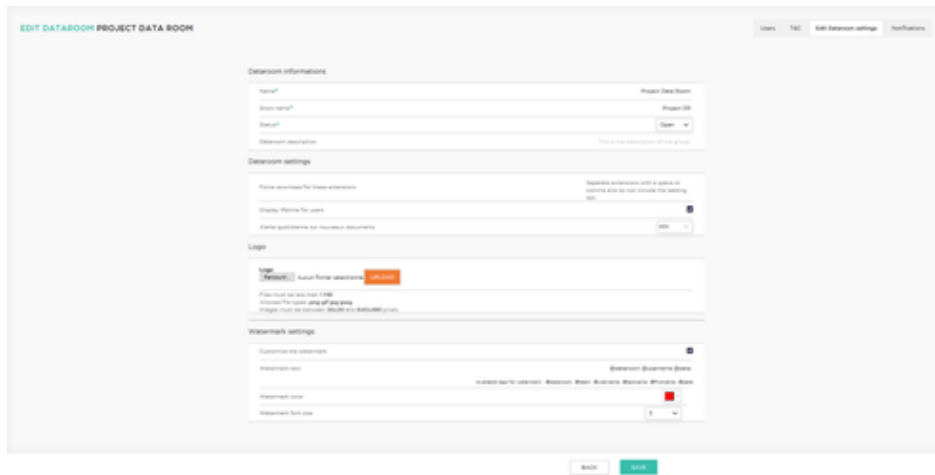


You can also access it from the banner at the top right.



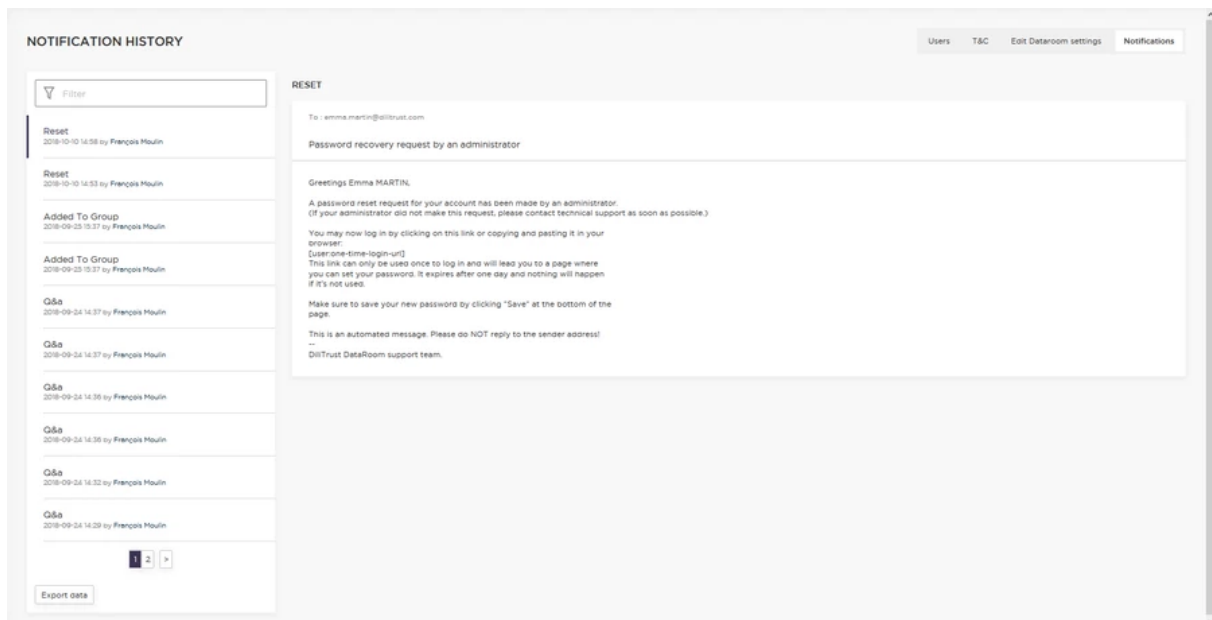
On this page, you can set up your data room:

- Name of the data room,
- Abbreviated name of the data room,
- Logo,
- Status of the data room (in preparation, open or closed)
- Description of the data room,
- Daily alert on new documents,
- Display the duration of opening to the users (the dates will be indicated under the logo in the homepage),
- Force download for these extensions,
- Interval between 2 TFA processes (if enabled),
- Watermark settings.



6.4. Notifications history

To access the notifications history, you can either select « Configuration » then « Notifications history ».



You will find the history of all notifications sent to users in this room. Are listed: documents notifications, meetings, invitations sent to users and password reset requests.

By clicking on the notification name on the left, its content will be displayed in the centre of the page.

You can also filter by notifications content.

All information displayed on this page can be exported in a spreadsheet.

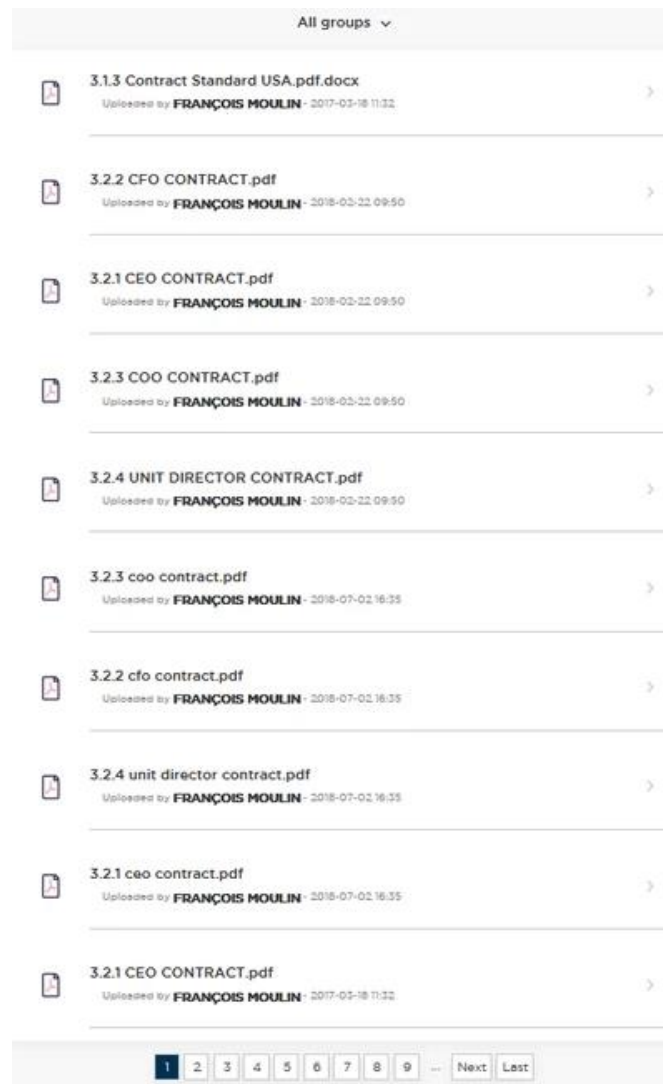
7. SEARCH

The search bar is always available on the portal besides the room's name.



Search allows any user to find a word in any content type he has access to.

To search, enter a keyword in the search bar and click "Search". The search results list is displayed in the page center.




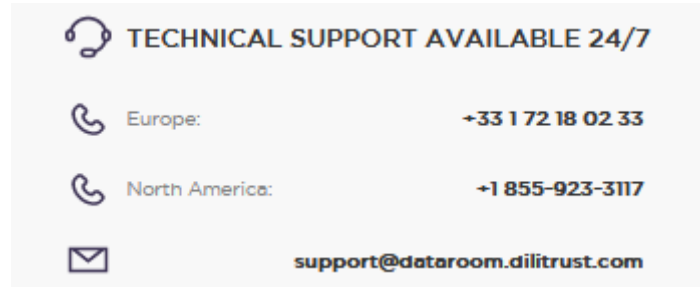
By clicking on a document, you will be redirect directly to the document.


Please note following indications about how the search operates:


- Check if your spelling is correct or try removing filters.
- Remove quotes around phrases to match each word individually: "blue drop" will match less than blue drop.
- You can require or exclude terms using + and -: big +blue drop will require a match on blue while big blue -drop will exclude results that contain drop.


8. SUPPORT


On the left, the  Support button is available. All support telephone numbers, and email address will be displayed by clicking on it.



 **TECHNICAL SUPPORT AVAILABLE 24/7**

 Europe: **+33 1 72 18 02 33**

 North America: **+1 855-923-3117**

 **support@dataroom.dilitrust.com**