



**DILITRUST**

# **DiliTrust DataRoom – User guide**

December 2020

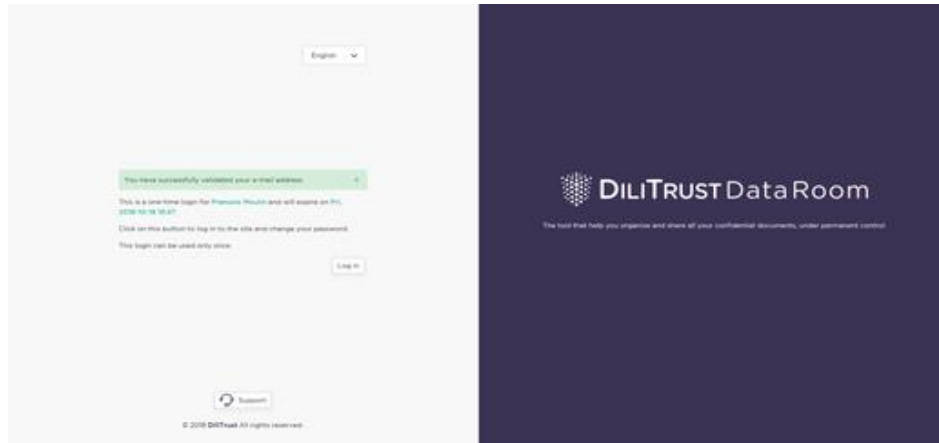
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# 1. PRESENTATION

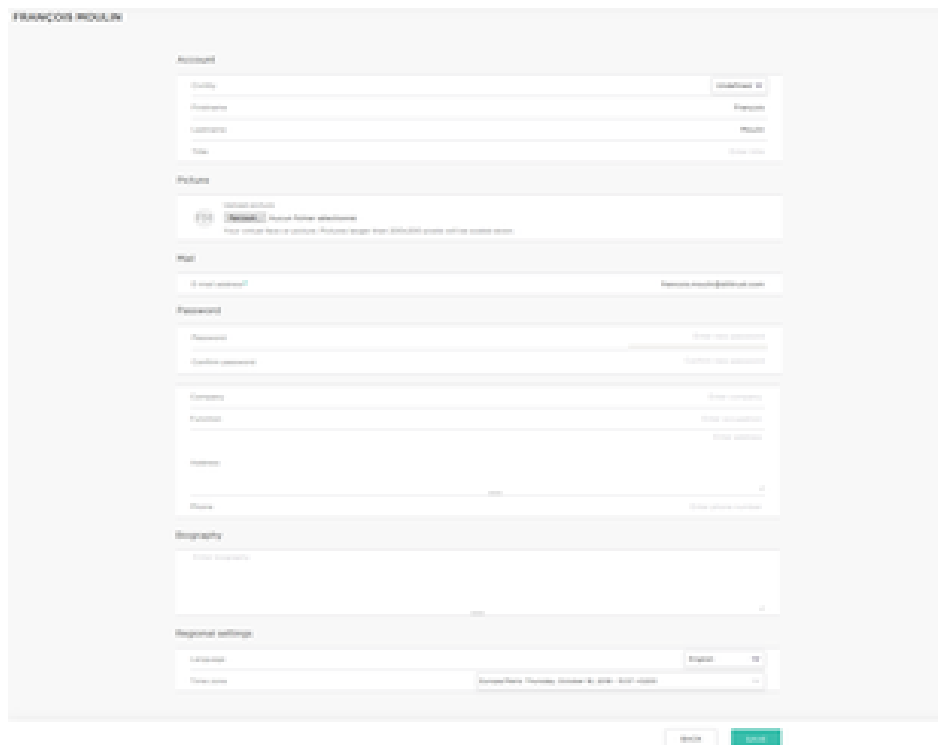
## 1.1. First login

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



Complete your account 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.

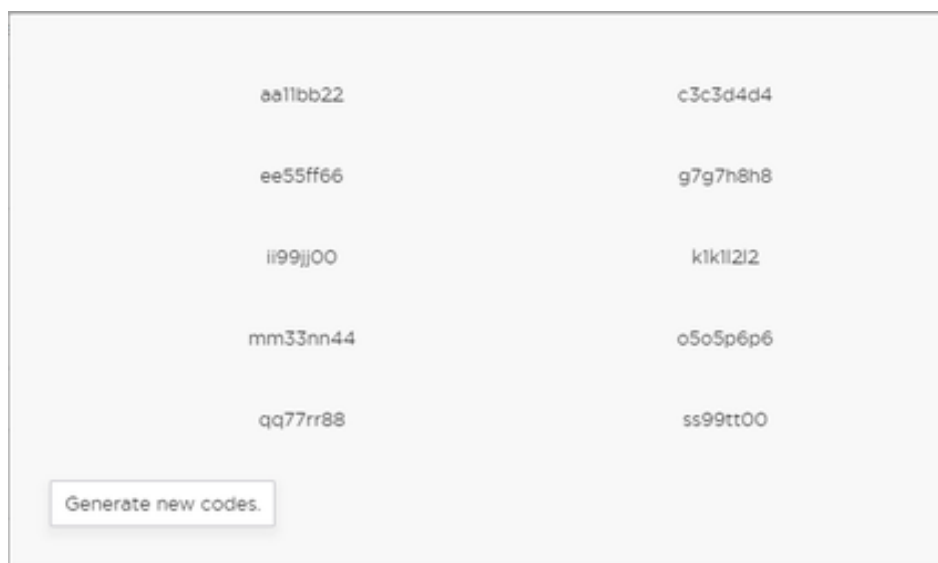
## The two-factor authentication via SMS

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 that you will have to enter to login.

### **Backup Codes:**

Backup codes allows you to still 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  button gives you access to your ten backup codes. To display the ten backups codes, you will have to previously fill in your password.



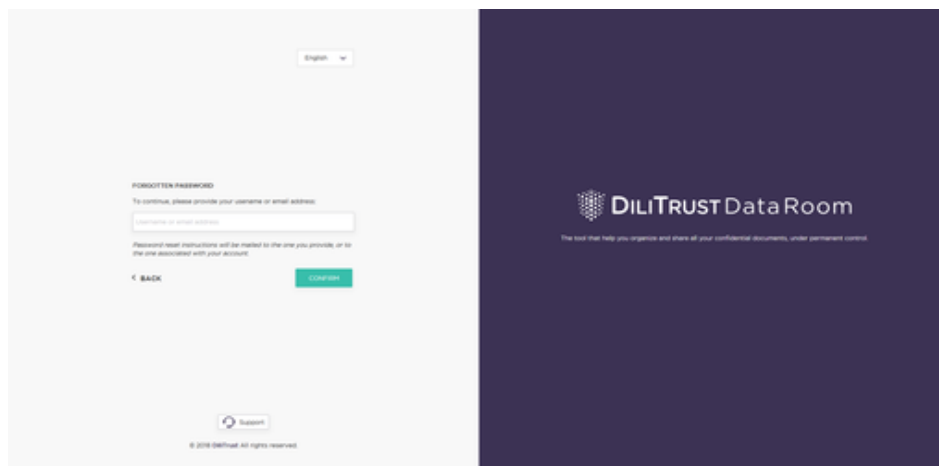
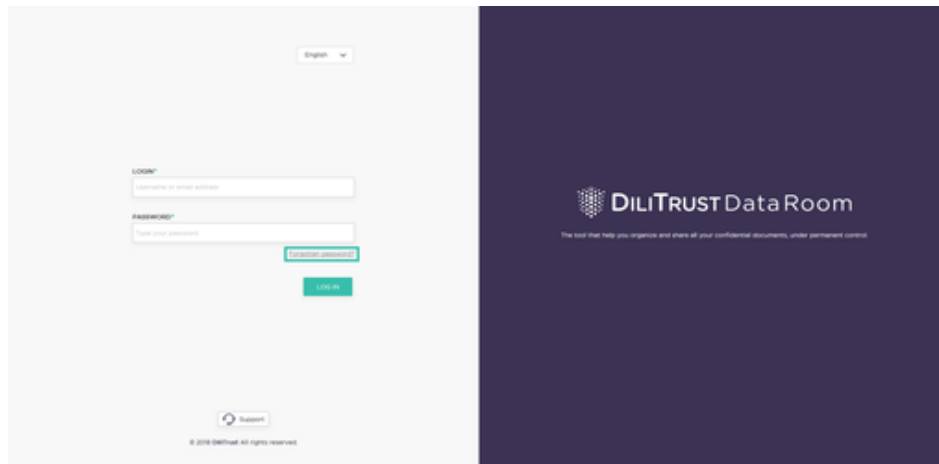
## 1.2. Access to the portal

You can access the portal through:

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

## 1.3. Forgotten password

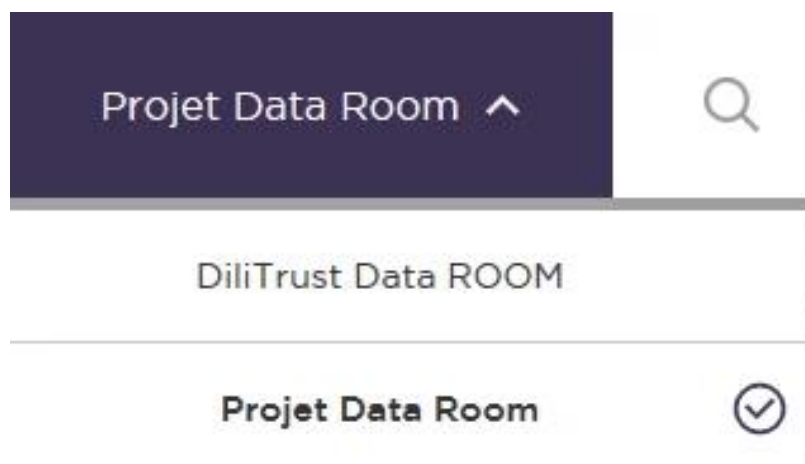
If you forgot your password, we invite you to select the « Forgotten password? » link on the portal. Enter your email address and you will be sent an email containing a one-time link valid only 24 hours to reset it.



**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.



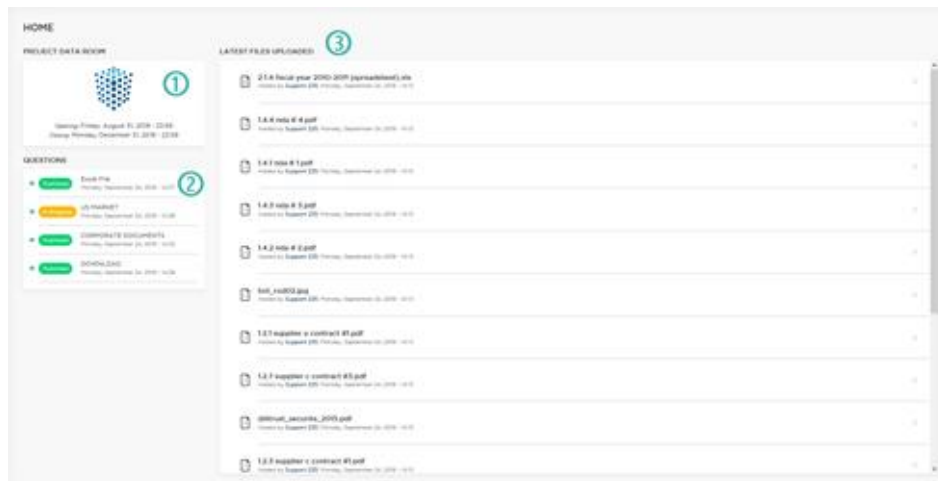
If you have access to several datarooms an arrow will be displayed on the dataroom's name right. You can switch dataroom by clicking on its name.

**NB:** You can have user rights in a dataroom and be administrator in 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: Lastest questions asked on the dataroom,
- ③: Lastest files uploaded on the dataroom.



### 1.5.1. Logo and description message

You have the logo of the dataroom and a description message on this section.

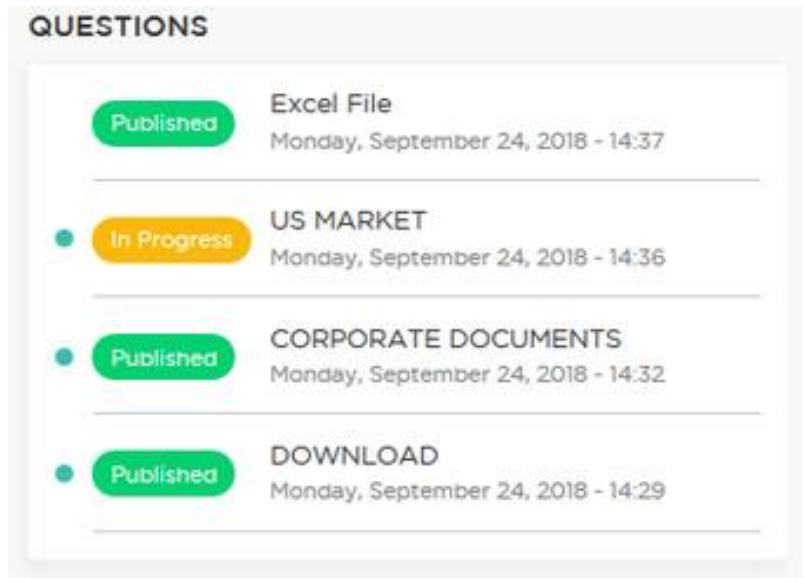
The dataroom life can be display by the administrator.



### 1.5.2. Q&A

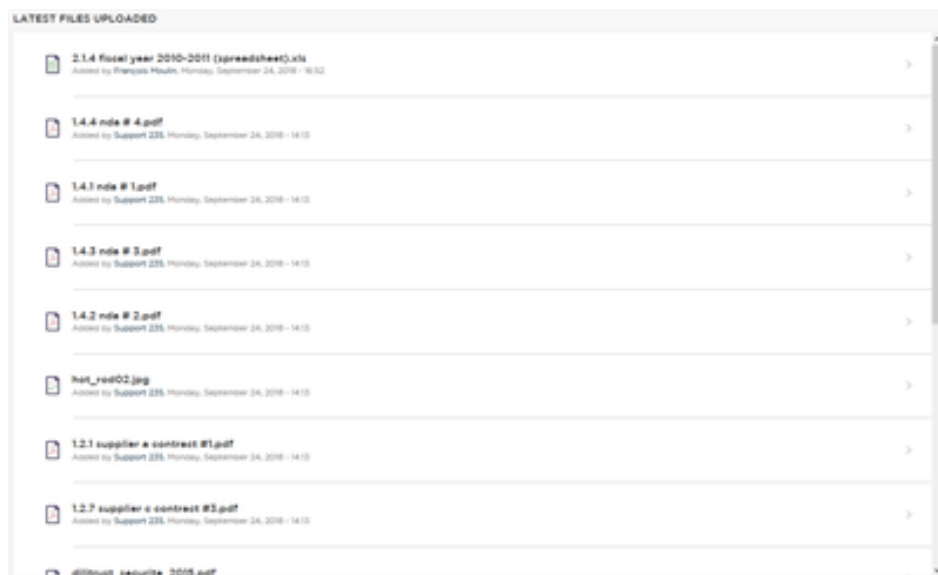
The 5 last questions asked by users of your team on the dataroom will be show on this section.

By clicking on a question, you can see the question itself or if the administrator's answer.



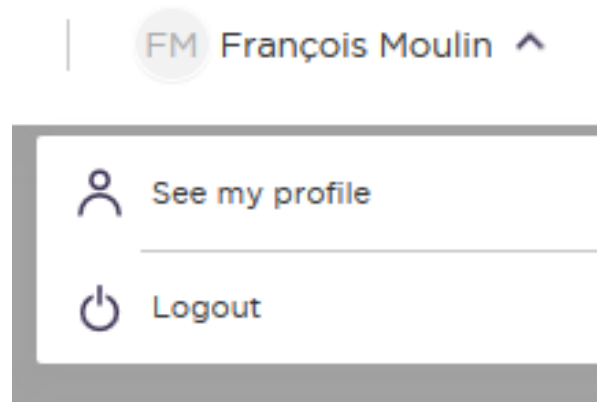
### 1.5.3. Lastest documents uploaded

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



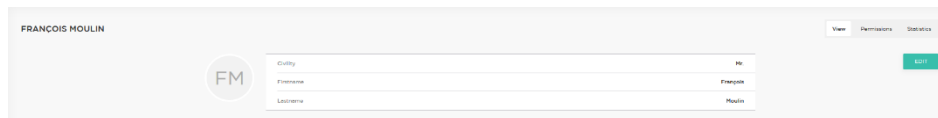
## 1.6. My profile

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

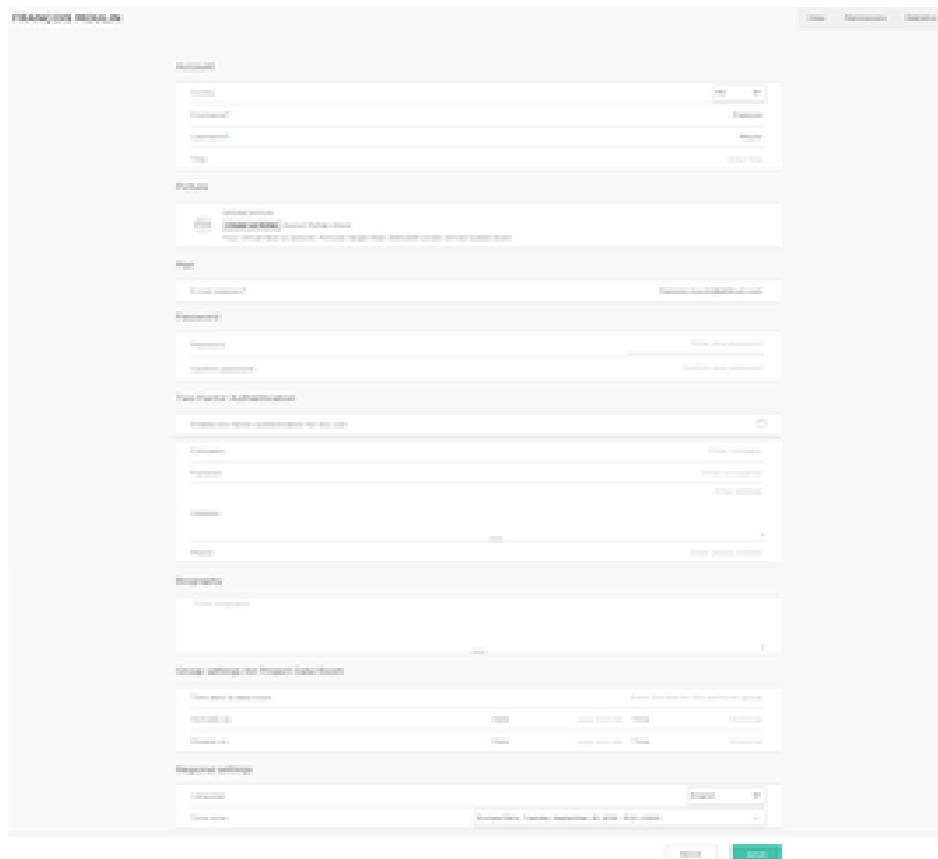


On your profile you will find your personal information filled in by you or by a portal administrator and a list of all datarooms that you have access to.

To edit your information, click on the “Edit” button.



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 dataroom upon login on the portal. You can also add a biography.



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

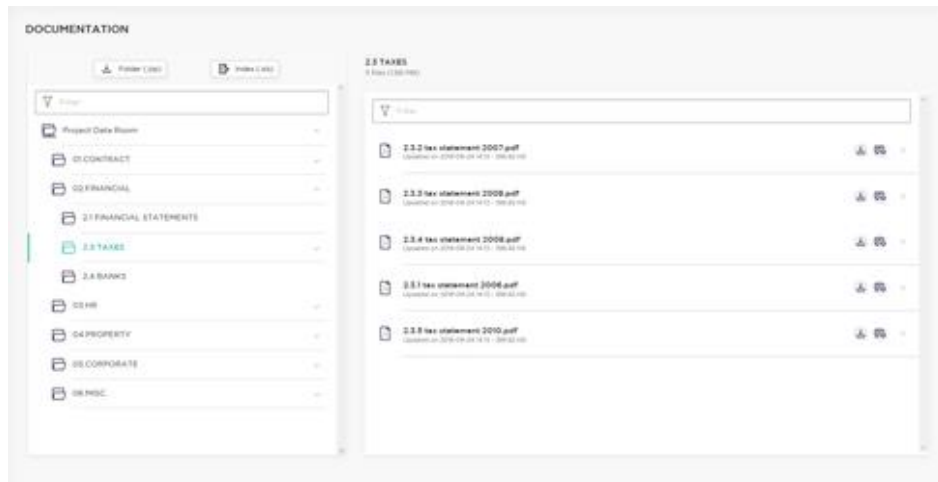
## 2. DOCUMENTATION

The « Documentation » tab includes all folders and files that dataroom's administrators have uploaded on the dataroom.

Once in documentation, the main folder is located on the left side of the page.

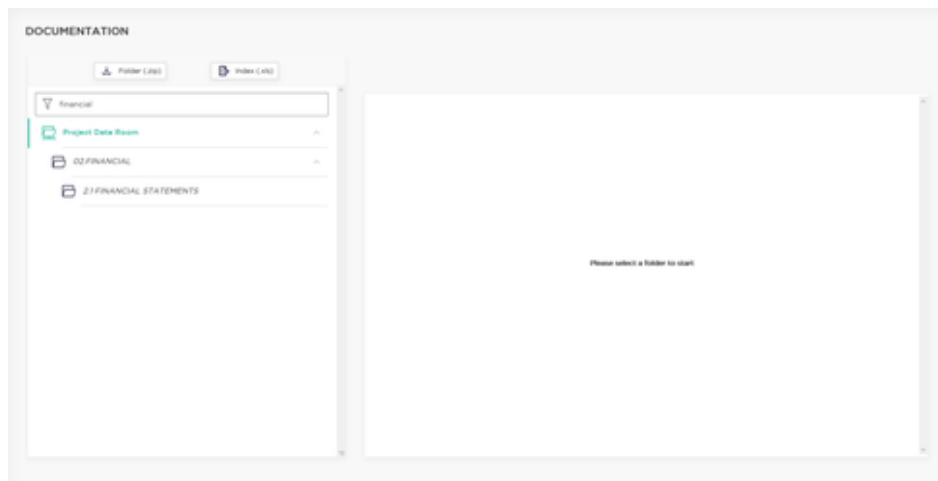
A folder containing subfolders is indicated by a grey arrow on the right of the folder.

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

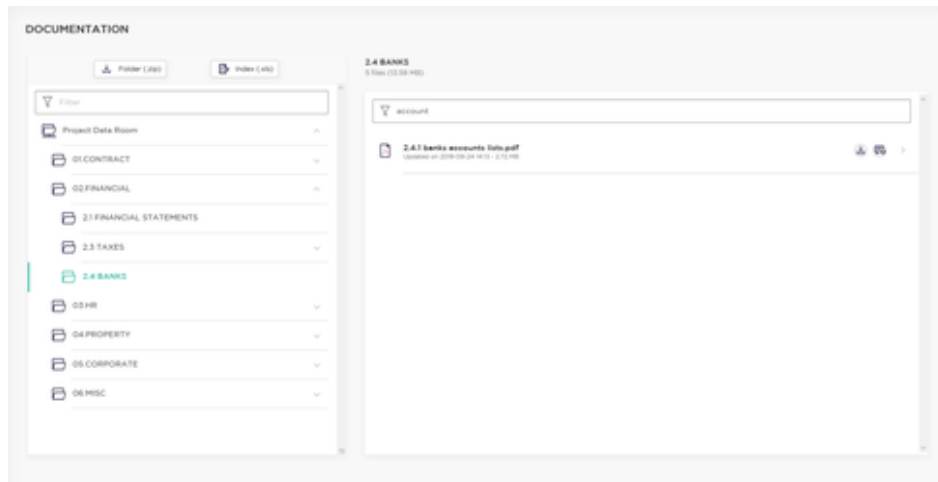


### 2.1. Search in documentation

It is possible to filter folders by their name to rapidly find one.




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

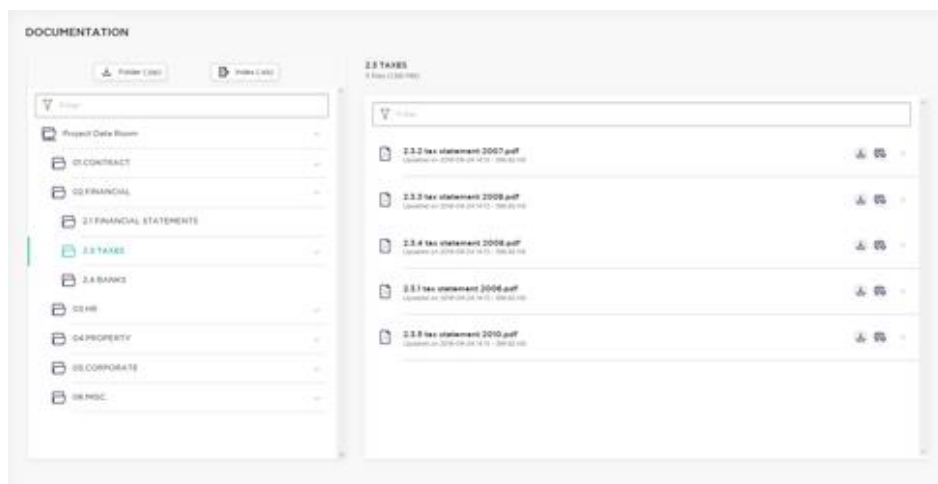


## 2.2. Actions on documents

To open a document, click on its title.


If administrators allow document download, the  button is visible and allows you to download the document.

All unseen documents will have a green dot next to their name.



## 2.3. Read a document

To read a document click on its title and the file will open in a new window.

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

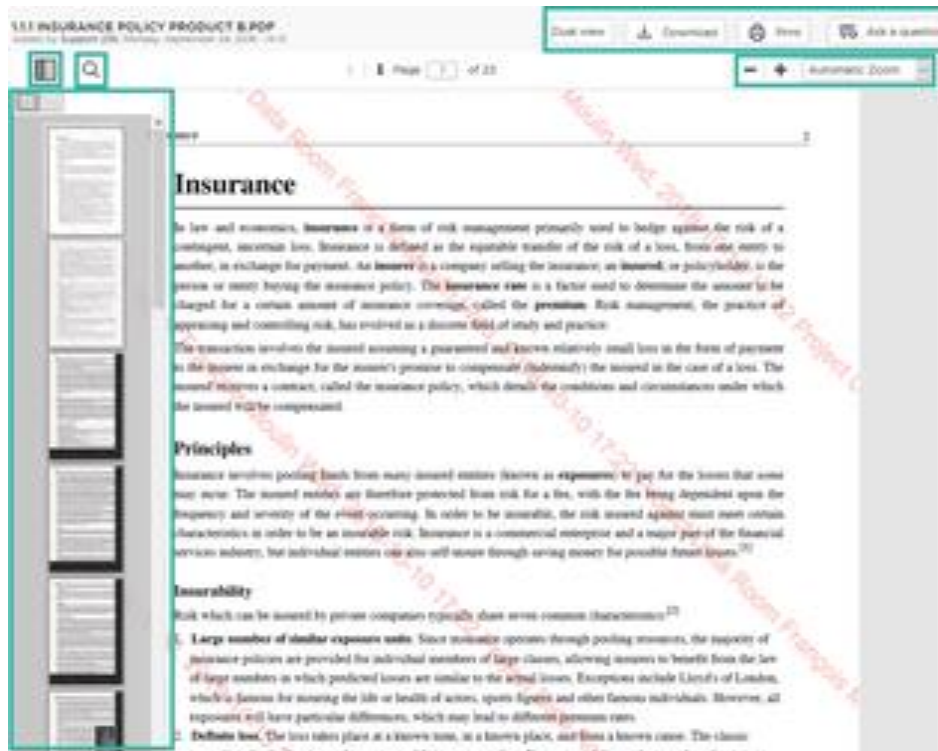
The magnifying glass allows you to search for words in the file (except for scanned documents).

A zoom is also available to ease your reading.

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

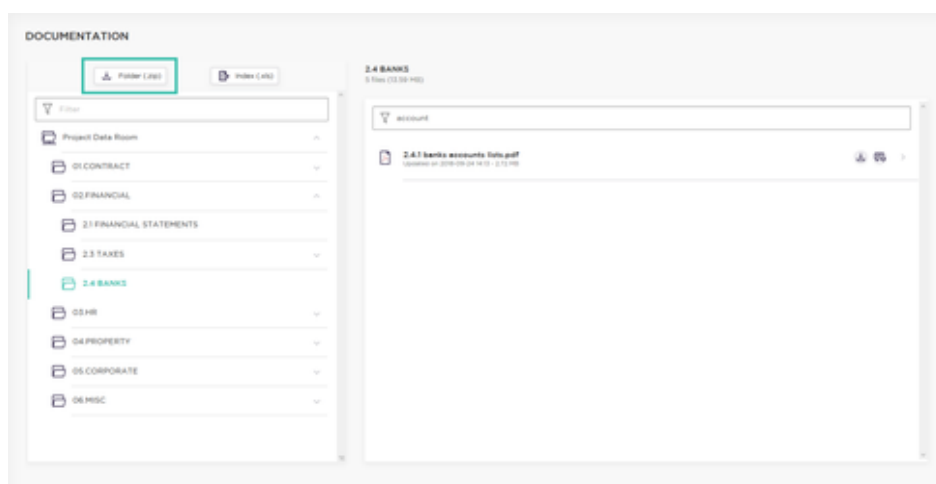


**Note:** Will be available only if these features have been activated by a portal administrator.

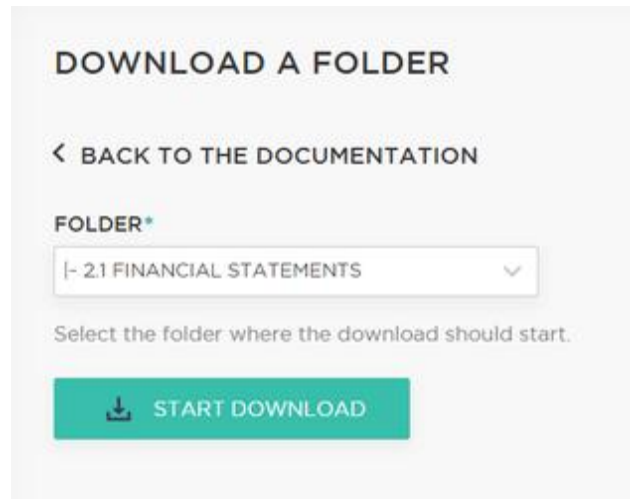


## 2.4. Downloading a folder

By clicking on the Folder (.zip) button on top of the folder tree, you will be able to download a whole folder, with all its subfolders and files.




A new page opens: a drop-down menu appears; it allows you to choose the folder you want to retrieve.



Once you select the folder you want to download, you will have to click on the START DOWNLOAD button.

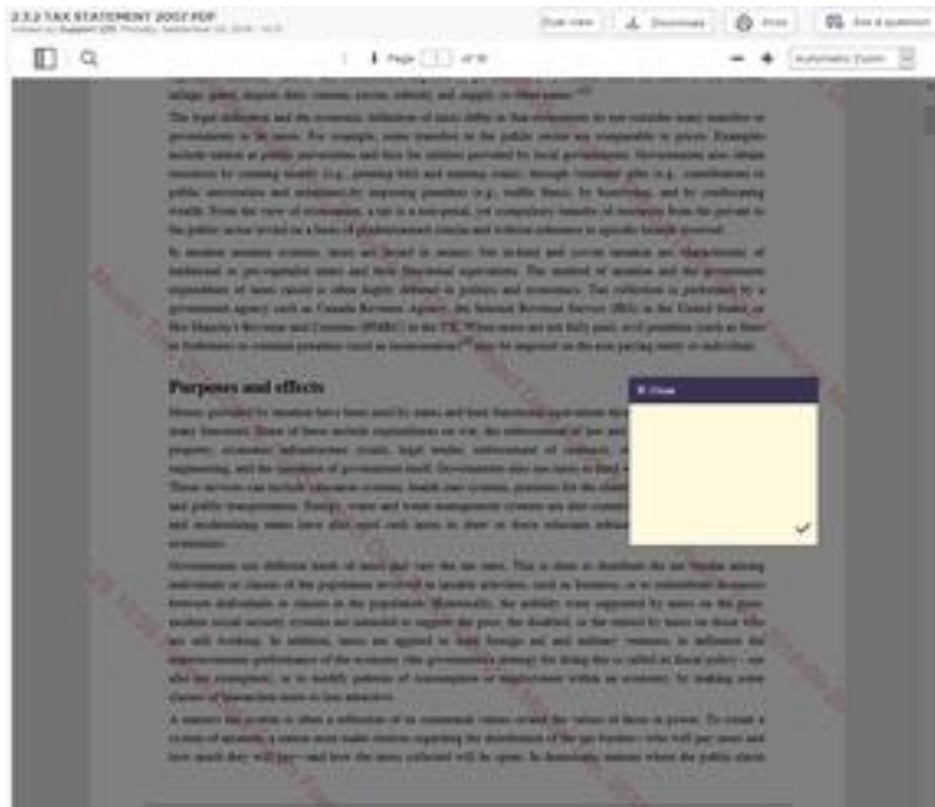
After a few moments, you will be able to download the generated archive by clicking on the DOWNLOAD ARCHIVE button.

## 2.5. Note taking


By clicking on the document, you will be able to take notes. A yellow post it will be displayed and allows you to write a note and save it by clicking on .

To close the note, click on the cross on its top right corner (this will not delete the note) you

can reopen the note by clicking on the  icon. The  button will permanently delete the note. To modify it click in its content, edit, and save.



**To share a note (if activated by administrator on your dataroom):** Open the note and

click on the . Users of your team 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).

**NB:** All notes taken on documents are personal. No administrator can read, or access notes taken by its users and inversely. You can access all your notes by selecting “Annotations”.

### 3. ANNOTATIONS

The Annotations tab lists all of your notes (written by hand or in post-it format) taken on the portal, from all groups you have access to.

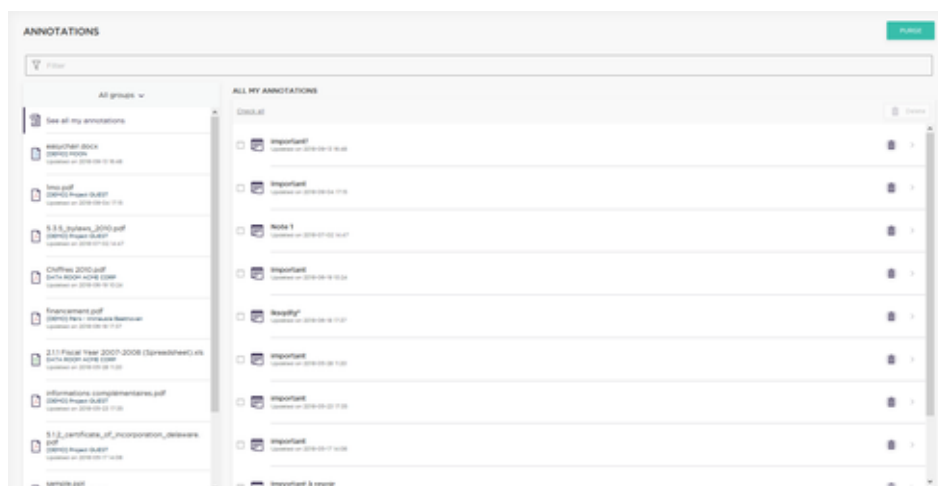
You will find, on the left side, the documents where notes were taken. All notes taken will be on the right side of your screen.

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 to this document will be displayed on the right side of your screen.

The « Purge » button (top right) deletes all notes taken on the portal.



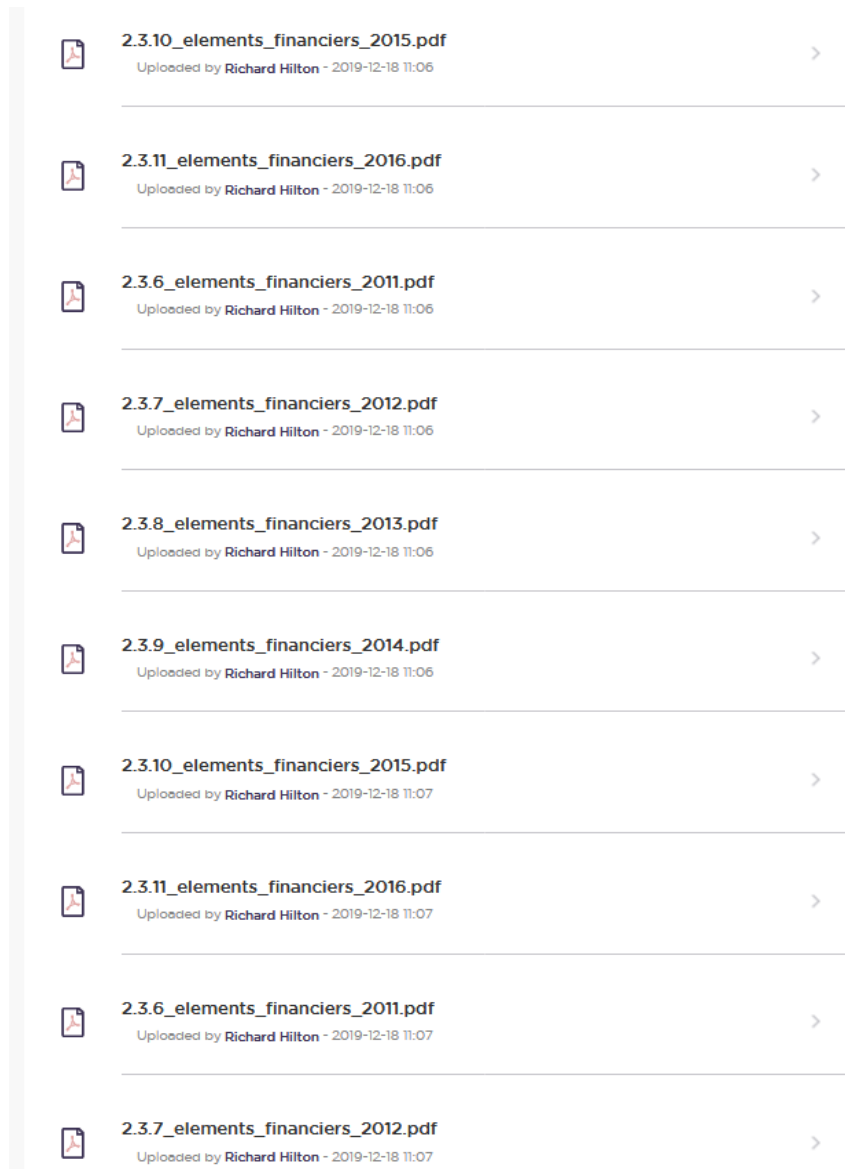
## 4. SEARCH

The search bar is always available on the portal right beside the group's name.



Search allows any user to find a word in any document 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. If the document is in a meeting, the meeting's agenda will be displayed on the left.


If the file is from the documentation section, only the document will be displayed.


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.


## 5. SUPPORT


On the left, the  Support button is available. All support phone 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**