

## DATA ROOM OPERATING INSTRUCTIONS version 3.0

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If you haven't already done so, organize your set-up meeting with MyCercle.  
For security reasons, a session is interrupted after 2 hours of inactivity. Nevertheless, remember to log out/déconnecter après utilisation.

By subscribing, you arrive on your dashboard to which you return by clicking on the HOUSE picto to the left of the top banner.

## DASHBOARD

### Customize

Click CUSTOMIZE to: choose the sender of the subscription messages, enable or disable alerts on your messaging system, add your logo, define the welcome on each guest screen (a text and a photo). Save.

### Add the Data Room of a new operation

Click + 1 DATA ROOM. Indicate the name of the operation, duplicate from another data room the titles of the folders of the new data room (with or without their contents). Choose the rights of the guests of this data room:

- Consult and add documents visible to other guests (Shared collection).
- Consult and add documents invisible to other guests (Cloisonné collection)
- Consult and ask questions invisible to other guests (multi-applicant presentation)
- Consult and ask questions visible to other guests (Single Audit Team)

Possibly modify the text of the watermark block. Validate.

### My subscription

Allows you to :

- Modify your subscription information (email, first and last name of the subscriber, billing email and address), change the payment method or change your credit card, change your password, consult the general terms and conditions, cancel your subscription.
- Follow your consumption with a summary of the use of the subscription. Click on COLLECT ALL USERS to get the list of users of the subscription (guest(s) and administrator(s)) with their data room(s).
- View the next billing date and the applicable scale.

### Search for a data room

Allows you to display the management screen of any data room of your subscription.

### List of operations with their data room(s)

Displays the list of operations in chronological order. For each one, click on the pencil to modify its name, on the trash can to delete the operation with the data room(s). Click on the button of each data room to access its management screen.

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## DATA ROOM MANAGEMENT SCREEN

### Create folders for filing documents in the data room

Click DOCUMENT FILING FILES to create one or more top-level folders. Validate. The folders appear on the data room management screen with a CREATE SUB-FOLDER button to click to create sub-folders to this folder (then sub-sub-folders, etc...). You can change the order in which the folders are classified by clicking DOCUMENT FILING FOLDERS: drag and drop the folder concerned and validate the moves.

### Adding a message or documents to the data room

Click ADD MESSAGE/Documents. Fill in (optionally) a title, the content of the message. Add the document (or up to 100 documents, by holding down the CTRL key on the keyboard, or the CMD key on the Mac) with possibly a dynamic confidential watermark and/or blocking the download. Choose the folder for filing the documents. Send only to administrators or validate and make it visible to everyone (you also have the option to save as a draft). Choose the type of email alert: none, the title and content of the message, the message and the documents attached to the email (the data room access button is always at the bottom of your guest's alert email).

You can add the documents yourself or by decentralized collection, by opening an ACCESS to third parties (see below). If it is annoying for one Access to see what others are adding, click on EDIT and choose the partitioned collection as guest right.

### Adding a confidential message to a single guest in the data room

Select the recipient of the confidential message, optionally add a title, the content of the message and possibly documents. Validate (or save as a draft). Choose the type of email alert: none, the title and content of the message, the message and documents attached to the email (the data room access button is always at the bottom of your guest's alert email).

### Add a guest to the data room

Click INVITES then ADD GUEST(S) to open access to the data room. Indicate his email and optionally his first name, last name and organization. Click ADD ANOTHER GUEST to add several guests. Choose if your guest will have screens in French or in English. Enter his invitation message and save it as a data room email for future invitations of guests in this data room. Invite.

### Add an Administrator to the data room

Click ADMINISTRATORS then ADD ADMINISTRATOR to create a data room administrator. The data room administrator has access to all data room control buttons. Indicate his name/name/email, optionally the organization. Enter his invitation message and save it as a standard email for future administrator invitations in your subscription. Invite.

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## View/edit/delete a message

The messages exchanged are classified in chronological order and each addition is signed and time-stamped. To visualize the messages, click on the green arrow then on the green arrow of the concerned message to visualize the detail of the message and to access the attached documents. To resume a Draft message, click on B. To delete a message, select the concerned message then click on the trash can.

## View / edit a document

A document can be accessed by unfolding its file folder or by entering letters of its title in SEARCH A DOCUMENT. Its addition is signed and time-stamped. To view a document, click on the picto and to download it on . To modify a document, click on its name or a characteristic and modify: its title, its visibility, its level of protection (green padlock, yellow for watermark or red for watermark and blocked download), its classification folder (which you can also modify by drag and drop).

## Delete/Download/Modify several documents

Select the documents concerned, click on the picto and then,

- Click DELETE and then Delete Confirmed to delete the documents.
- Click DOWNLOAD to download multiple documents.
- Click EDIT to change the titles, visibility, level of protection, filing folder of multiple documents.

(Only the download function will be accessible to your guests).

## Retrieve all the content of the data room as a protected zipped file.

Click COLLECT ALL DATA ROOM to send you all messages and documents from the data room as a password-protected zipped file (useful before deleting a data room).

## Traceability of data room consultations

Click TRACABILITY. Three files in csv format are added in the «Unclassified document(s)» folder with the status Administrators (invisible to guests): Contents to date (with the list of visible documents), consultations to date (with the time-stamped list of guest consultations), access to date (with the list of guests who have had access to the data room with the dates of arrival and departure of each).

## Modify the data room

Click Edit to change the operation or data room name, guest rights, watermark text.

## Create a data room linked to the same operation for a new step (e.g. from a collection data room to a presentation data room).

A linked data room is a new data room attached to the same operation. It shares the codename of the operation. Linked data rooms share the same top banner with their specific names to easily switch from one to the other (the order can be modified by dragging). The management of their access is integrated (from the INVITES button); their accesses can be different.

Create a linked data room by clicking + 1 DATA ROOM. You indicate its name. You decide if you duplicate in this new data room a data room of the same operation: the title of the folders only or also their contents, and then if the author of the addition of each document is visible or not. You choose the rights of the guests according to the type of the data room created. You adapt the text of the watermark. Validate.

## Manage your guests

Click INVITES. Pilot the guest accesses with the pictos: clicking on the red picto turns it to green and gives the guest access to the concerned data room (the reverse deletes the existing access), but only after SAVE MODIFICATIONS. You send an invitation message (click ADD WITH MESSAGE) or you invite without a new invitation message (click ADD WITHOUT MESSAGE). A green picto tells you if your guest has logged in or not to the data room. Click on the pencil to change his name, first name or organization and on the trash can to delete a guest from all data rooms.

## Manage your administrators

Click ADMINISTRATORS. Pilot the administrator accesses with the pictos: clicking on the red picto turns it to green and gives the administrator access to the concerned data room (the reverse removes the existing access), but only after SAVE MODIFICATIONS. Click on the pencil to modify the name, first name, organization or email of an administrator on all the data rooms he administers. Click on the trash can to delete an administrator on all data rooms of the subscription.

## Delete a data room

Click DELETE DATA ROOM to permanently delete the entire data room. The deletion is guaranteed and there is no possibility to recover its content.

