



## ShareSecure Admin User Guide

### Table of Contents:

<b>ShareSecure Admin Overview</b>	<b>2</b>
<b>ShareSecure Admin Home Dashboard</b>	<b>2</b>
<b>Create Users from Salesforce/AIM</b>	<b>3</b>
<b>Create Users from ShareSecure</b>	<b>3</b>
<b>ShareSecure User Status</b>	<b>4</b>
<b>Create Groups</b>	<b>5</b>
<b>Create Document Categories</b>	<b>5</b>
<b>Create New Document in ShareSecure</b>	<b>6</b>
<b>Share Document with Additional Users, Groups</b>	<b>7</b>
<b>Remove / Deactivate Investor Contacts + Users</b>	<b>8</b>
<b>Document Actions</b>	<b>9</b>
<b>Customize Default Document Notification Emails</b>	<b>10</b>
<b>Create/Manage Agreements</b>	<b>11</b>
<b>Investor Contacts &amp; Correspondence Preferences (Only required if subscribed to Investor Correspondence)</b>	<b>12</b>
<b>Reports</b>	<b>13</b>

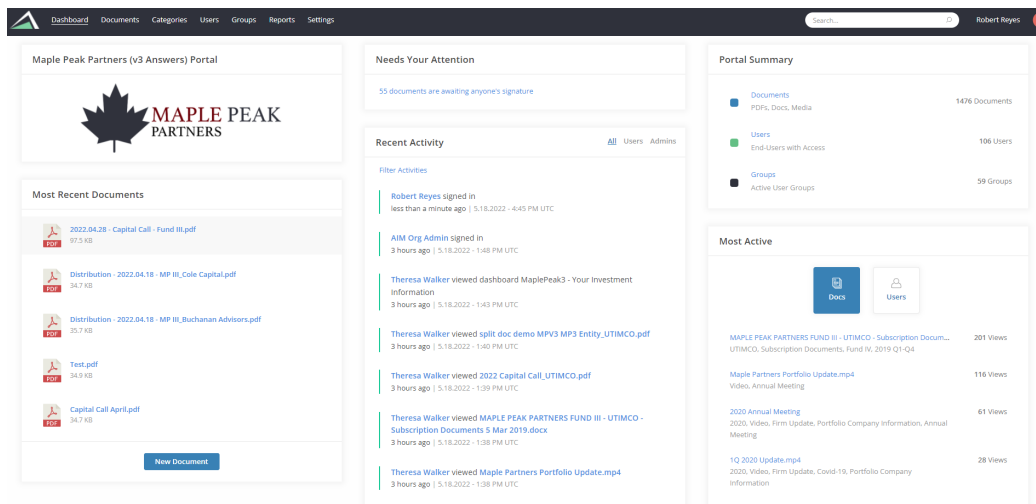


## ShareSecure Admin Overview

ShareSecure is a Virtual Data Room/LP Portal solution that integrates with Salesforce/AIM. It includes custom branding, activity feeds, and allows for User and Group management. Documents can be uploaded via integration with the optional Investor Correspondence module or directly via drag & drop bulk uploads.

## ShareSecure Admin Home Dashboard

When you log into ShareSecure as an admin, you will land on your home Dashboard. This is where you can get a fast overview of Most Recent Documents, a Recent Activity feed, the Portal Summary, and Most Active Documents and Users.



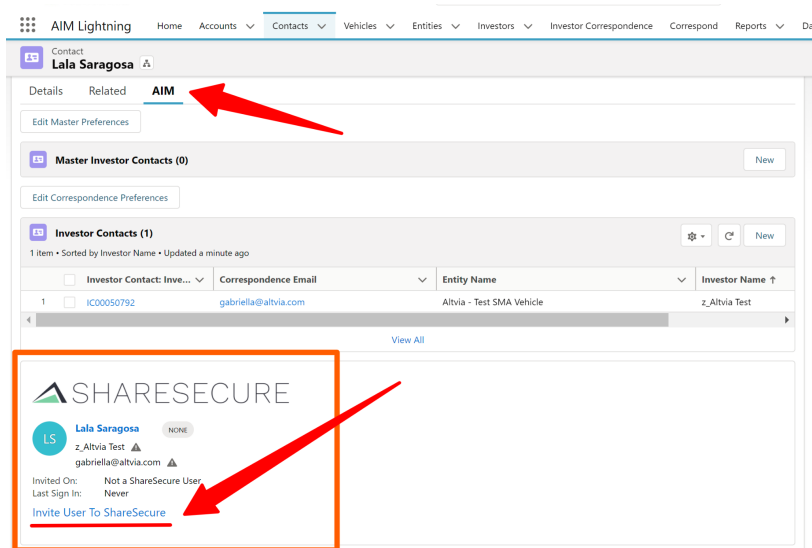
- **Most Recent Documents** - See and click to access the Documents that were most recently posted. Use the 'New Document' button to quickly upload a new Document.
- **Recent Activity** - View a feed broken down by User, activity, and date/time. See all activity on the default feed, or click the option to filter by Users or Admins only.
- **Portal Summary** - A quick overview of total number of Documents, Users with access, and active groups in ShareSecure. Click a heading to be taken to the corresponding page in ShareSecure to view or take further action.
- **Most Active** - See the most active Documents and Users along with view counts. Click View Full Report to be taken to a complete list where you have the ability to download the data as a .CSV or excel spreadsheet for further analysis.



## Create Users from Salesforce/AIM

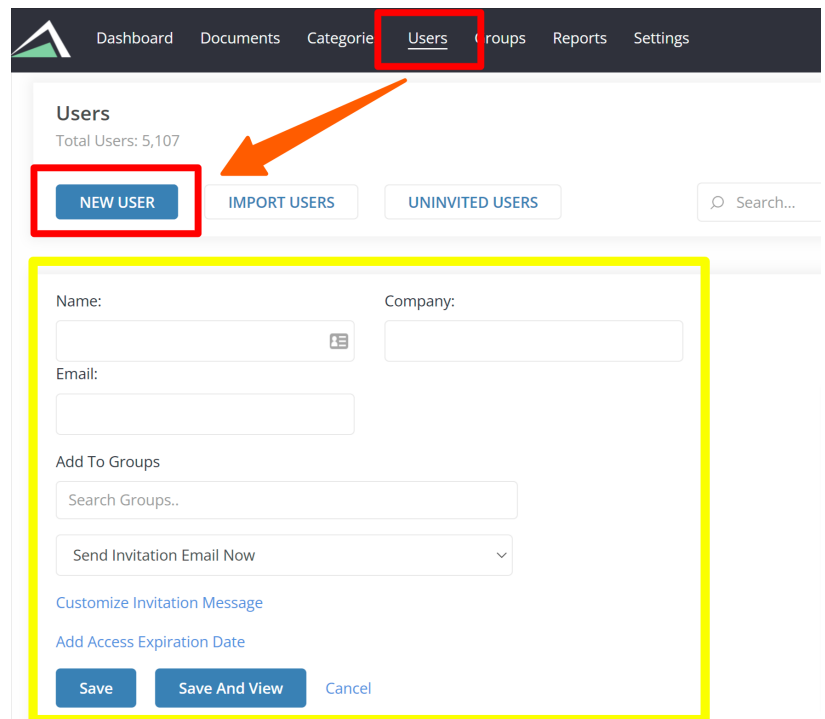
**\*Best Practice\*** (creating Users from CRM rather than within portal automatically creates link between Salesforce Contact and ShareSecure User)

1. From within AIM, Navigate to Contact or Investor Contact record
2. Locate the ShareSecure widget
3. Click 'Invite User To ShareSecure'
4. Admin will be taken to ShareSecure to finalize User creation and choose when the invitation email is sent.



## Create Users from ShareSecure

1. Click User tab in top panel
2. Click New User button
3. Add Name, Company, Email, and any known Groups.
4. Choose when to send the invitation email
5. Click Save





## ShareSecure User Status

Theresa Walker
[Edit](#) | [Clone User](#) | [View As User](#)

---

UTIMCO

demos+theresawalker@altvia.com

Status: **Active**

Invited: 03 Jan, 2018

Documents: 140

Groups: 17

2-Factor Authentication: Inactive

Receives Notifications?: **Yes**

[Disable Doc Upload](#)

[Send Password Reset Instructions](#)

[Remove Access](#)

EXPORT ▼

- **Access Expired:** These are users who had previously registered and had access to the portal, but their access is now expired due as a result of the admin setting an expiration date on their profile. These users do not have access to the portal.
- **Active:** This status represents registered users who currently have access to the portal and can engage with its content and features.
- **Invitation Expired:** Users who were invited to join the portal but didn't accept the invitation before it expired. They need to request a new invitation to join the platform. Invitations expire in 14 days by default.
- **Locked:** This status applies to users whose access to the portal has been temporarily suspended due to suspicious activity during login. Users will receive an email with unlock instructions should they be locked out of their account.
- **Pending Invitation:** Users who have been CREATED in the portal but NOT INVITED. Users in this state do not have access to the portal and are waiting to be invited.
- **Pending Confirmation:** User has been INVITED but not logged into create their account. Users will remain in this status for 14 days after being sent an invite and then move to Invitation Expired if they have not confirmed their account.

### Email options on the user page:

- Send Confirmation Email - Sends a new invite with new token access
- Send Invitation Reminder Email - Sends the same invite with same token for access

## Create Groups

Groups are used to bucket similar Users together. A Group can be created for an Investor with all Investor Contacts. Groups can also be used for each Fund to easily send out correspondence to a specific fund.

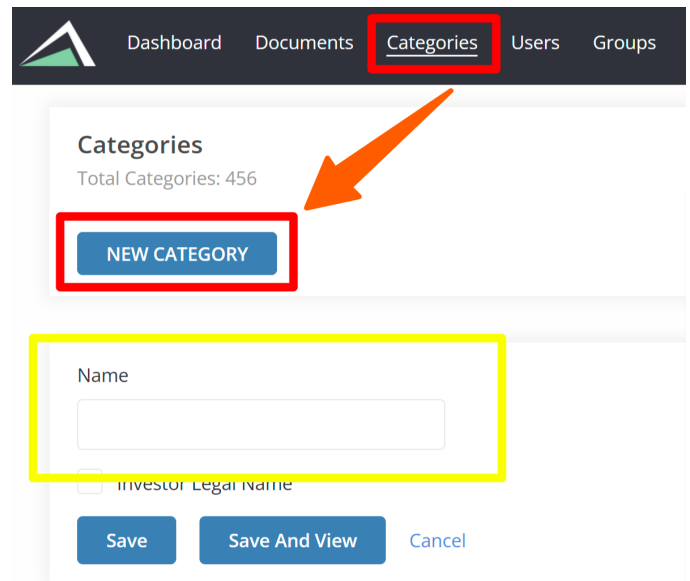


1. Click Group tab in top panel
2. Click New Group button and create a Group Name
3. Search Users to add people that already have User profiles in ShareSecure. Alternatively, select the 'Everyone' checkbox if all Users should be in this Group.
4. Select the 'Give Answers dashboard access to users' if the Users in this Group should have access to an Answers dashboard.
5. Click Save

### Create Document Categories

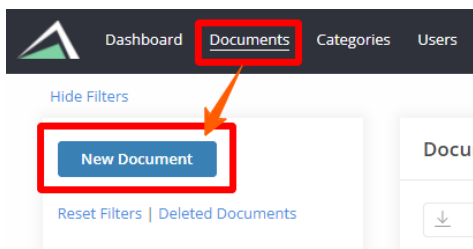
1. Click Categories tab in top panel & click New Category button
2. Add the new Category name and click Save

**Please note** that Investor Legal Name categories are automatically created when you send an Investor Correspondence batch to ShareSecure, you do not need to create them manually.

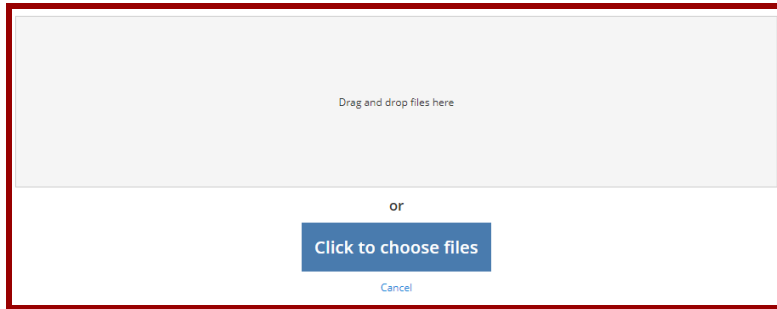


### Create New Document in ShareSecure

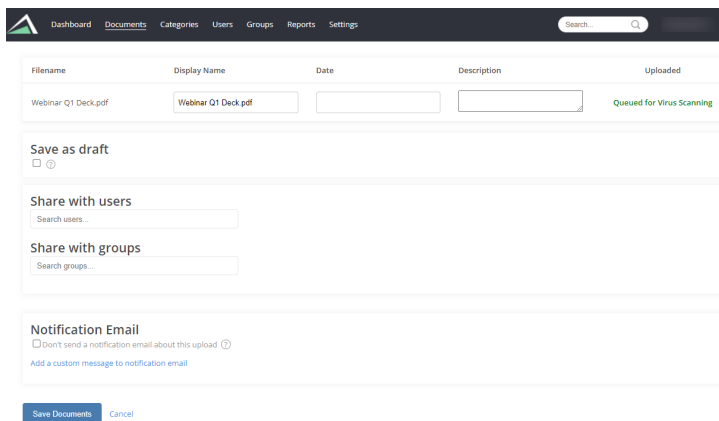
3. Click Document tab in top panel & click New Document button



4. To add Document, either drag and drop a file from desktop or click to choose files



5. Once Document is selected, administrators can opt to add a Document to a Category, share with Users &/or Groups, and manage email notifications



6. Click Save Documents to finish uploading your doc & to send an email notification if you chose to send one. Keep in mind that Users can opt out from Document notifications.

### Share Document with Additional Users, Groups

1. Go to Documents tab and locate the Document you want to share
2. Click into the Document
3. Determine whether to share with Group or User
  - a. To share with User, click Share button from 'Users Who Have Access' box
  - b. To share with Groups, click Share button from 'Groups That Have Access' box



**Webinar Q1 Deck.pdf** View | Download | Edit | Delete

Date: 2022-01-10  
Last Modified: 02.08.2022  
Size: 11.7 KB

File Type: PDF  
 Watermarking: Disabled  
 Version: 02.08.2022

Description: test

Created: 08 Feb, 2022 by Altvia Admin

**Users Who Have Access**  SHARE

NONE

**Groups That Have Access**  SHARE

NONE

#### 4. Select Users or Groups then click Add to share

**Users Who Have Access**  SHARE

Create New User

Share Document With Users

Add Cancel

NONE

**Groups That Have Access**  SHARE

Share Document With Groups

Add Cancel

NONE



## Remove / Deactivate Investor Contacts + Users

1. Select 'Remove Access' from ShareSecure

**Carter Chandler** Edit | Clone User | View As User

Altvia  
 carter@altvia.com  
 Status: Active  
 Invited: 10 Jan, 2019

Documents: 0  
 Groups: 1  
 2-Factor Authentication: Active

Disable Doc Upload  
 Send Password Reset Instructions  
**Remove Access**  
 EXPORT

2. Clear Correspondence Preferences from the Contact within AIM

**Contact Karl Ijjas** + Follow Edit Clone Enable Customer User DC Check IC Prefs Report

Title	Account Name	Phone (2)	Email	Requested Research Report	Inactive
	z_Altvia Test		jeff.ijjas+test@altvia.com	<input type="checkbox"/>	<input type="checkbox"/>

We found no potential duplicates of this Contact.

**Details** Related

Name: Karl Ijjas	Contact Owner: Altvia
Account Name: z_Altvia Test	Middle Name:
Nickname:	Phone:
Reports To:	Mobile:
Academic Title:	Home Phone:
Title:	Phone Direct:
Email: jeff.ijjas+test@altvia.com	Other Phone:
Alternate Email #1:	Fax:
Alternate Email #2:	Opt Out:

**AIM**

Edit Master Preferences

**Master Investor Contacts (1)** 1 item • Updated a few seconds ago

<input type="checkbox"/>	Master Inv...	Account Name	Correspondence Email
<input type="checkbox"/>	MIC: Karl Ijjas	z_Altvia Test	jeff.ijjas+test@altvia.com

Edit Correspondence Preferences **1**

**Investor Contacts (1)** 1 item • Sorted by Investor Name • Updated a few seconds ago

<input type="checkbox"/>	Investor Contact	Entity Name	Investor
<input type="checkbox"/>	Karl Ijjas - z_Altvia Test	Altvia Test 2	z_Altvia

From the above screenshot

- (1) Use the Dynamic "IC Prefs Report" to see all current Investor Contacts. Within the report, set all Preferences to 'False' or export to Excel and run the update via XL-Connector
- (2) Select the 'Edit Correspondence Preferences' button to open the Preference manager component. From there, set all Preferences to 'False'

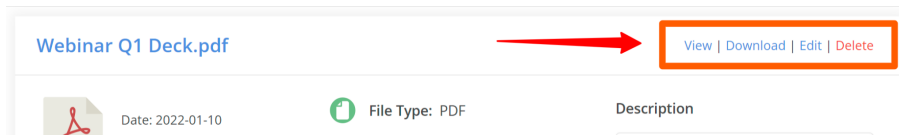




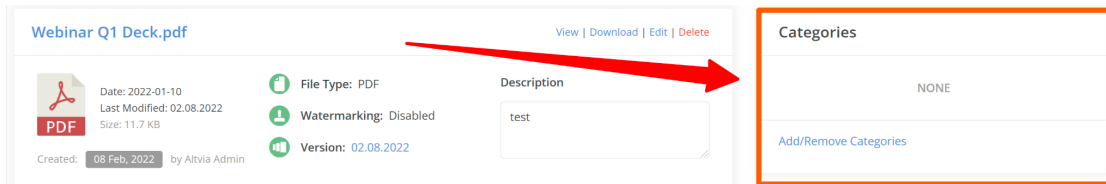
## Document Actions

From within a Document, Admins can view the Document, edit Document information, and download the Document to their device. Admins can also add or remove Categories for organizing the Document within ShareSecure.

1. Click into a Document
2. Note the Document actions available along the top right



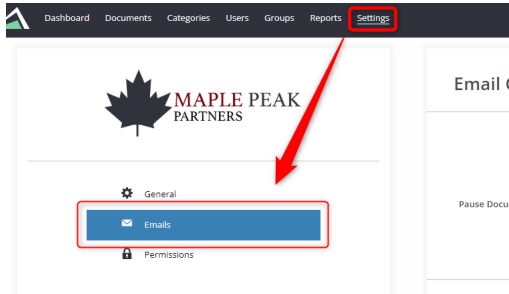
3. To update the Categories this Document is assigned to, go to the Categories box on the righthand side, use the 'Add/Remove Categories' button to make adjustments



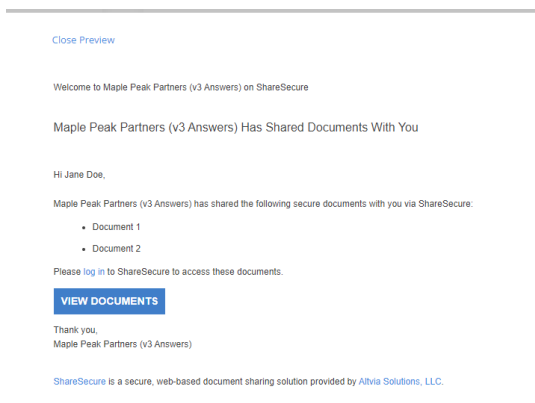


## Customize Default Document Notification Emails

1. Go to Settings in the top panel, then select click Emails



2. Scroll to the Notification Email section at the bottom left of the page
3. Click on Preview to see the standard default notification message, click Close to exit the preview



4. You can override those default message settings for Subject, Body, and Signature by adding your own messaging to those fields. Note that you can use the provided merge fields in the Body by copying & pasting the merge field into your message. Making updates here will change the default notification email for all Document uploads moving forward.

Notification Email [Preview](#)

**Subject**  
(Defaults to "Maple Peak Partners (v3 Answers) Has Shared Documents With You" if blank)

**Body**  
(Defaults to a standard message if blank. You can use {{user\_name}}, {{organization\_name}}, {{organization\_link}}, and {{documents\_list}} as merge fields)

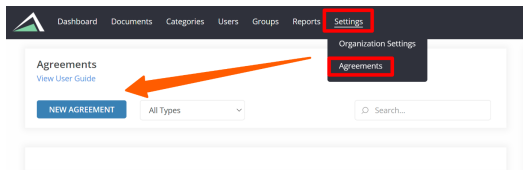
**Signature**  
(Defaults to "Thank you, Maple Peak Partners (v3 Answers)" if blank)



## Create/Manage Agreements

You can easily create, track and audit Terms & Conditions, Privacy Policies, Electronic K1 Consents and more via Agreements in ShareSecure. View active and historical Agreements with response rates surfaced on this page and see a recent Agreement activity feed along the right hand side.

1. Go to Settings in the navigation bar, then click on Agreements > New Agreement

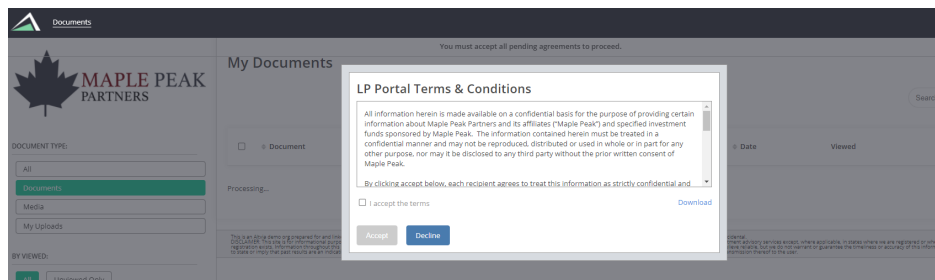


2. Populate the relevant details to create a new Agreement

- a. Agreement Details
  - i. Name
  - ii. Type
- b. User Targeting
- c. Content

3. After you add your content, click Save to preserve your work, then you can click Preview to view the Agreement as users will see it.
4. When you are satisfied with the Agreement, click Publish to activate the Agreement.

Once an Agreement is published, each User that is targeted will be prompted to accept the terms in order to gain entry to the portal. If the User declines the Agreement, the User will be logged out of the portal.





## Investor Contacts & Correspondence Preferences (Only required if subscribed to Investor Correspondence)

- Investor Contacts created in AIM will need Correspondence Preferences populated for ShareSecure deliveries.
- Create a new Investor Contact either from Contact or Investor record

Contact **Bob Hartman**

+ Interaction Printable View Edit Move Conta

**Investor Contacts (1)** New

1 item • Updated a few seconds ago

<input type="checkbox"/>	Investor Contact: Inve...	Contact	Investor Name
1	<input type="checkbox"/> IC00000135	Bob Hartman	Maple Partners IV, L.P. - GCM Grosvenor

[View All](#)

Investor **Boulder Partners - Fund II** + Investor Contacts + Interaction Printable View Edit Delete Clone Add File

Account	Entity	Commitment	Pro rata (%)	Last Interaction	Last Interaction Date
Boulder Partners	Maple Partners II, L.P.	\$40,000,000.00	12.31%		

**Details** Interactions Transfers Files & History Account Details

Investor Name	Boulder Partners - Fund II	Last Interaction	
Investor Legal Name	Boulder Partners	Last Interaction Date	
Entity	Maple Partners II, L.P.	GP Member	<input type="checkbox"/>
Account	Boulder Partners	Consultant	

**Commitment Details**

Original Commitment	\$40,000,000.00	Commitment Date	
Commitment	\$40,000,000.00	Closing Round	
Pro rata (%)	12.31%	x_Import_ID	a0J6A000000ixQ0UAK

**Investor Contacts (1)** New

Dale Morales - Boulder Partners - Fund II  
 Contact: Dale Morales  
 Primary:

[View All](#)

- Update Correspondence Preferences based upon which Documents (i.e. Correspondence Types) the Investor Contact should receive and how (ShareSecure, Email, etc.) the Investor Contact should receive them.

**Edit Correspondence Preferences: Lala Saragosa**

Lala Saragosa - z\_Altvia Test

**Correspondence Preferences**

CORRESPONDENCE TYPE	<input type="checkbox"/> SHARESECURE	<input type="checkbox"/> EMAIL	<input type="checkbox"/> FAX	<input type="checkbox"/> MAIL	<input type="checkbox"/> OTHER
Annual Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Account Balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital Call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GP Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal - Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal - Investor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal - LPA and Amendments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quarterly Reports and Financials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Report - Investor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## Reports

1. To access Reports, click Reports tab in top panel
2. Select the Report you wish to view and/or download

### 3. Select applicable Report

- Users Report
  - View your organization's users and visits information

Users Report

Download: [CSV](#) | [XLSX](#)  
Total Users: 5,117

Name	Email	Company	Access Role	Receives Notifications	Last Visit	2FA Enabled	Number of Visits	Access Expiration
[Redacted]	[Redacted]	[Redacted]	User	Yes	12/27/2021, 5:23:01 AM	Yes	17	

- Activity Report
  - View visit and Document view/download activity for your organization

Activity Report

Download: [CSV](#) | [XLSX](#)  
Total Activities: 54

User	Email	Company	Access Role	Action	Related Record	Time
Altvia Admin	[Redacted]	Altvia	Administrator	Granted Document Access to Karl Ijas	Webinar Q1 Deck.pdf	2/9/2022, 1:24:26 PM

- Document Access Report
  - View all Document access for all users

Document Access Report

Download: [CSV](#) | [XLSX](#)  
Total Rows: 95,551

Name	Email	Company	Access Role	Document	Categories	Access Type	Access Granted Time	Watermarked
Craig Test	[Redacted]	Altvia	User	Cap Call Split Doc.docx	Test IC Batch - Cap Call, Capital Call	Direct	2/8/2022, 4:29:52 PM	No

- Agreements Report
  - View all Agreement responses for your organization

Agreements Report

Download: [CSV](#) | [XLSX](#)  
Total Rows: 351

User	Email	Company	Access Role	Agreement	Type	Created At	Created By	Status	Confirmed At
Aaron Klein	craig+aaron.klein@altvia.com	Harvard Endowment	User	Data Room Access	Terms and Conditions	12/9/2021, 8:25:42 AM	AIM Org Admin	Pending	