



ShareSecure - LP Experience- User Guide

** - denotes net new functionality from previous documents page

New Experience Preview Toggle** (Temporary)

The Investor/LP Experience update introduces new designs and features, offering users the ability to voluntarily enable or disable the new design via the New Experience toggle in the navigation bar. This allows users to personally explore and evaluate the functionality of the update before it becomes the default view. Previewing the new interface is as simple as clicking the toggle button.

ShareSecure Documents Manager Page Overview

ShareSecure is a Data Room/LP Portal solution that allows for the sharing of documents between GPs and LPs and other users invited to the portal. Finding, viewing, and downloading documents via an intuitive UI allows users to track and access the files they need when they need them. Through advanced security, ShareSecure keeps every document for even the most complex deals safe and secure.

Navigation Bar

The navigation bar allows users to see the logo of the portal they are a member of and the options to navigate through the app. Users should see the the following navigation tabs:

- Documents Tab
- Analytics Tab (if Answers is enabled)

In addition to the navigation tabs, users will also see their User Menu with their name, email, access to additional portals, and my account settings.

ShareSecure Documents (Document Manager) Tab

When logging into ShareSecure, users immediately land on the Documents Page. This is where users can get a fast overview of All Documents they have access to, the Categories to which they are organized in, and a number of additional features to help find the specific documents they are looking to access. Each one of the features on this page are described in more detail below.

Categories Sidebar

Categories act like tags and are specifically used by the admin of the portal to organize and categorize documents pertaining to the specific context of the documents they have shared with a user. The left categories sidebar is the home for categories and provides the following features to help find the documents a user is looking for within each category.



Category Search**

The category search bar allows users to search over all the categories and narrow down the specific ones they are looking for. As a user searches in the field, the correlated category or categories will appear as search results in each individual section. If a search does not produce a result then the sections below will read “No Matching Categories” and the search can be cleared via the button in the search field of the Clear Search Button above the sections.



The screenshot shows a dark-themed interface with a search bar at the top labeled "Search categories". Below the search bar are several filter options:

- All Documents +99
- My Uploads 24
- Uncategorized 49

Below these is a section titled "By Investor Name" with the following entries:

- Paul & Co 48
- UCF Endowment 9

At the bottom, there are two columns: "All Categories" and "View Recent". The "All Categories" column lists years from 2017 to 2022, each with a count of 9, and "Capital Call" with a count of 24.

All Documents and My Uploads Filters

The “All Documents” and “My Uploads” text buttons are quick filters for filtering the documents table to show all available documents to a user and documents that have been uploaded by the user respectively. Clicking each filter resets any filters that have been previously applied by the user.



Uncategorized

Similarly to the All Documents and My Uploads filters, the Uncategorized filter will show all those documents that are available to a user that have not been associated to a category by the admin. This is helpful to understand what documents in the portal are not associated with Categories and may need to have categories added to them.

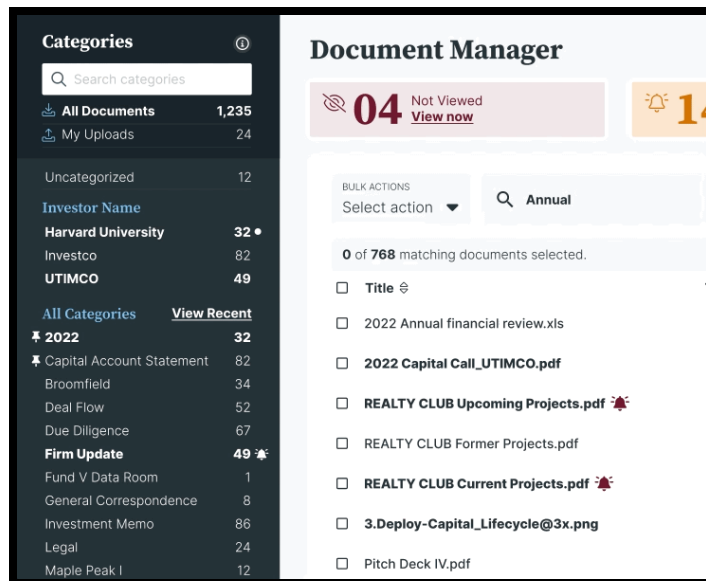
Investor Legal Name Section

The Investor Legal Name section provides users with an organized location of categories pertaining directly to documents that have their investor legal names associated with them. Many of the document distribution tools allow admins to automatically associate this category to distribution documents.

All Categories/Recently Active Section**

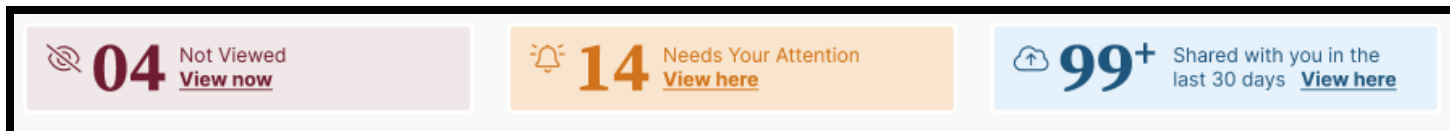
This section is where all of the categories that have been organized by the portal admin for the investor live. The section has the ability to toggle between different views by preference. Each section will present the total document count with an associated category to the right of them and are updated any time a user refreshes the page.

- **All Categories:** This is the default view and shows all categories that are available to the user.
 - Categories in this section are ordered from Alpha-Numerically from A-Z.
 - This list excludes Investor Legal Name categories which appear in the section above it.
- **Recently Active **:** This category section shows the user a view of categories that have recently been updated with documents or created and are now available to them.
 - This list of categories also excludes Investor Legal Name categories which appear in the section above it. Recent Active is defined as:
 - A new category is exposed to a user that was unavailable to user since their last login or page refresh
 - An existing category has a new or existing document shared/associated with it or since page refresh or last visit.
 - Categories in this section are ordered by Most Recent at the top to Least Recent at the bottom by date of the activity took place.
- **Pinning Categories**:** This feature introduces the ability for users to customize their experience by pinning desired categories to the top of the categories sidebar. Categories can be pinned within both the Investor Legal Name section and All Categories/Recently Active section. This feature allows for quicker access and better navigation, tailored to their specific categories and needs. Pinned categories will persist between logins ensuring that users will see the same categories pinned to the top of each section every time they login



Document Manager Quick Filter Stats**

Below the navigation bar and above the table that lists documents are 2-3 widgets which act as quick filters and provide high level information regarding the documents available to users. Details below.



Not Viewed (View Now)

Not viewed shows the total number (99 or less) of documents available to a user which have currently not been viewed by the user. Clicking on the widget resets any filters currently in use and shows only the documents which have not been viewed by the user in the table below the widget. Un-clicking the widget resets the table to a view of All Available Documents.

Share with you in the last 30 days (View Now)

This quick filter stat shows the number (99 or less) of documents that have been shared with the user in the last 30 days. Clicking the widget resets any current filters applied and shows only those documents that have been shared with the user in the last 30 days. Un-clicking the widget shows all available documents. The option to apply this filter is also present in the Filter By Date dropdown above the documents table.

Needs Your Attention (View Here)

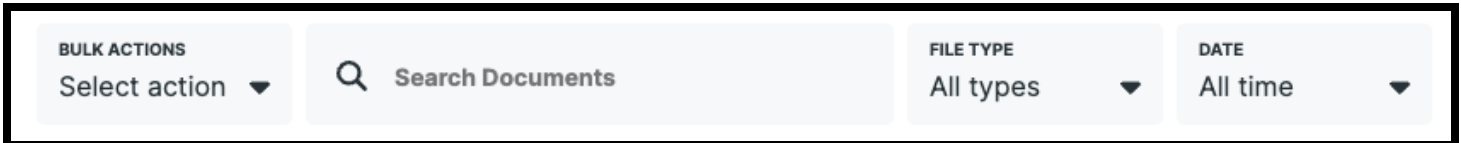
Needs Your Attention widget appears only when the user has a Pending Document Signature request. Clicking on the Needs Your Attention quick filter navigates the user to the "My Pending Signature Requests" Page. If no Pending Signature Request exists for a user, the widget will not be displayed on the Documents Page.



Document Manager List of Documents Table

Document Table Actions

User can see a summary of their documents and perform the following actions across their available documents:



- **Download Selected/Download All**
 - Users can use the multi-select checkboxes on the table to download a selection of documents or bulk download all documents excluding media.
- **Search**
 - Users can search over the documents table
- **Filter by File Type****
 - Users can filter by all available file types within their portal (Excel, Word, PDF, etc)
- **Filter by Date****
 - Users can choose to filter the table of documents by the following date ranges: All Time, Today, Last 7 days, Last 30 days, Last 60 days, Last 90 days. The date shown to the user is the date chosen by the admin or the shared date by default.

Documents Table Columns and Rows

0 of 210 matching documents selected. Clear all ✕						
<input type="checkbox"/>	Title ⇅	Type ⇅	Categories ⇅	Date ⇅	Viewed ⇅	Actions
<input type="checkbox"/>	2022 Annual financial review.xls		Capital Call, UTIMCO, 2022, +3	05/05/2022		
<input type="checkbox"/>	2022 Capital Call_UTIMCO.pdf		Capital Call, UTIMCO, 2022	05/05/2022		
<input type="checkbox"/>	REALTY CLUB Upcoming Projects.pdf		0 Realty Club UPCOMING	4/26/2022		

Each row in the table represents a single document. Each column represents a description of that particular document. In general, individual rows of documents that have not been viewed will appear in bold text. Once the document has been viewed the boldness of the text will be removed. Details of each individual document are below:

- **Document (sortable)**
 - Shows the file name



- **Type (sortable)**
 - Shows the file type icon and can be sorted alphabetically
- **Categories**
 - Shows the categories associated to the file
- **Date (sortable)**
 - Shows the date the document was uploaded or chosen by the admin from newest to oldest
- **Viewed (sortable)**
 - Shows whether or not the user has viewed or not viewed the document and is sortable
- **Actions**
 - View
 - Download (non-media only)
 - Sign (if applicable)

Rows per page and Page Controls**

Users can select how many rows of documents they want to view by selecting 25, 50, or 100 rows per page. Users can scroll through the page and select fast forward to the first or last page by using the page controls.

