



ShareSecure Workspaces:

Welcome to the ShareSecure Workspaces User Guide.

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Overview

Prior to ShareSecure’s introduction of “Workspaces” (formerly referred to as Orgs or Portals), it was only possible to have one ShareSecure portal connection to AIM. Now, with this significant enhancement, you are able to manage and connect MULTIPLE portal “Workspaces,” to our Correspond Investor Edition tool within AIM. Like a data room or an LP Portal for document reporting, this allows each “Workspace” to have its own purpose, users, and admins, allowing you to keep information neatly separated and secure.

Alongside these enhancements, we’ve established a new position and re-envisioned existing ones, specifically Hub Admin and Workspace Admin roles. The Hub Admin is charged with supervising the administrative aspects of all Workspaces across the company or Workspace Hub. They manage the addition and removal of Workspace Admins, who are tasked with maintaining appropriate user access and supervision within each distinct Workspace.

Administrators and investors who are members of various Workspaces can switch smoothly between distinct Workspaces, which suits businesses that have several branches or divisions under a single organization.

Keep reading this guide to take full advantage of ShareSecure’s new “Workspaces” feature that is designed to keep your firm’s data organized and under control.

New “Workspaces” Feature Functionality

How will ShareSecure “Workspaces” and Correspond Investor Edition (AIM) work together?

ShareSecure Workspaces feature works seamlessly with Altvia Correspond Investor Edition to enhance the distribution of tailored investor communications across distinct business use cases. The platform’s smart document distribution capabilities allow you to direct these communications to specific workspaces within your organization, each



aligned with unique business scenarios and investor profiles. This targeted approach, combined with our siloing capabilities, ensures that documents and data are kept compartmentalized, maintaining strict confidentiality and compliance with individual investor needs. This strategy not only streamlines communication workflows but also reinforces data integrity and privacy across different facets of your fundraising and investor relations efforts.

At the beginning of the Investor Edition Batch process, users will be able to select which ShareSecure workspace a given batch will be delivered to.

New Investor Correspondence Batch

Correspondence Details | Select Recipients | Manage Documents | Compose Email | Review

Record Type: Capital Call

Batch Name:

* Entity:

Date:

Record Type: Capital Call

Due Date:

Workspace: Altvia Product Test AKA Staging

ShareSecure Categories: Capital Call

Cancel Save

New Role: Hub Admin

Hub Admins are users who have elevated permissions to manage and oversee workspaces within their Workspace Hub. Managing a workspace will be done from the Workspace Hub page which is accessible via the Hub Admin link in the user profile drop-down of a user.

STAGING

Paul Workspace Hub Admin

- Hub Admin Settings
- Document Portals
- My Account
- Help
- Share Error Details
- Sign Out

Your Document Portals

PV Capital Partners LP Portal

PV Capital Partners Data Room

SHARESECURE

PV CAPITAL PARTNERS



Key Responsibilities

- Managing Admins across multiple Workspaces within a single Workspace Hub.

How to Become a Hub Admin

- Hub Admins can only be invited by an internal member of the Altvia team.

Existing Role: Workspace Admin Formerly referred to as "Org Admin," the role of a Workspace Admin maintains identical administrative privileges and access levels across all specific workspaces they belong to within a single Workspace Hub.

Key Responsibilities

- Management of Users, Documents, Categories, Groups, and Workspace settings from within the Workspace.

How to Become a Workspace Admin


- Workspace admins are invited by the Hub Admin to a specific workspace

Hub Admin Responsibilities & Workflows

Hub Admins will have access to an individual view of each workspace which includes the following:

- A list of current Workspace admins with the ability to add/remove
- A list of high-level details about their workspace




STAGING
Paul Workspace Hub Admin

[< All Workspaces](#)
[< Return to Workspace Hub](#)

PV Capital Partners Data Room

Workspace Admins New Workspace Admin

If an admin's invite has expired, remove the user, and re-add them to send a new invitation

Name	Email	
PV Capital Partners Data Room Admin	paul+pvdataroomadmin@altvia.com	Remove User
Paul Workspace Hub Admin	paul+pvcapitalpartnerstenantadmin@altvia.com	Remove User

Workspace Stats

Date	Admin Users	Non-admin Users	Visits Last 24 Hrs	Last Activity	Documents	Groups	Categories	Activities
2023-11-15	2	0	0	2023-11-09	0	0	0	6
2023-11-14	2	0	0	2023-11-09	0	0	0	6
2023-11-08	2	0	0	2023-11-06	0	0	0	5
2023-11-07	2	0	3	2023-11-06	0	0	0	5

Inviting Workspace Admins

To invite a Workspace Admin:

1. Navigate to the Workspace Hub.
2. Select a Workspace.
3. Select New Workspace Admin.
4. Enter User's name and Email.
5. Press save to Send the invitation.

Revoking Workspace Admin Access

1. Navigate to the Workspace Hub.
2. Select a Workspace
3. Click "Remove User" from the list of Workspace admins.



Frequently Asked Questions (FAQs)

- 1. How does siloing documents using workspaces in ShareSecure ensure privacy and control across different sections of a business?**
 - a. Siloing documents using workspaces in ShareSecure allows for a structured separation where workspace admins from one area cannot access or view sensitive documents in another workspace. This compartmentalization is key for maintaining strict data privacy and control across different sections of a business, ensuring that each workspace contains only the documents relevant to its specific admin and Investors. This feature is particularly useful for organizations that require discrete data environments for various internal groups, projects, or investments.
- 2. What distinguishes the roles of a Workspace Admin from a Hub Admin?**
 - a. A Workspace Admin manages a single workspace, including its documents, users, and data. A Hub Admin oversees all workspaces within an organization, with the authority to manage Workspace Admins and company-wide user access.
- 3. What are the capabilities of a Hub Admin in terms of user and admin management?**
 - a. The Hub Admin role in Sharesecure is designed to give users overarching control over the management of workspace admins. As a Hub Admin, you have the authority to invite new workspace admins to specific workspaces, ensuring that only authorized personnel can manage and access sensitive information. Additionally, you can remove workspace admins if they no longer require access or their role changes. This level of oversight is critical for maintaining the security and proper governance of the data within each workspace. Eventually, the Hub Admin will have a granular ability to control the permissions of Workspace admins.
- 4. What is the difference between "Collections" and "Workspaces" in terms of admin and user access?**
 - a. When you silo documents by workspaces, you are creating distinct, isolated environments within the platform. Each workspace functions as a separate entity with its own set of documents, admins, and investors. Admins and users have access only to the workspace to which they have been invited, and cannot see or interact with documents in other workspaces. This method is effective for maintaining high-level separation between different divisions or projects within a company. Collections are used to restrict visibility and access to certain documents for Admins within the same workspace.
- 5. Do you recommend using Workspaces over Collections?**



- a. We recommend using workspaces over collections when your goal is to maintain strict separation of entire areas or departmental functions within your organization.
- 6. Can workspace admins view documents in workspaces they don't manage?**
 - a. No, workspace admins can only view documents, users, and other items that they are a workspace admin for.
- 7. Is it possible to customize the level of access for different admins within a workspace?**
 - a. Not Currently - In the future, we will be optimizing the ability for Hub Admins to specifically provide granular levels of permissions per admin in a single workspace.
- 8. What is the process for setting up a new workspace and ensuring it is siloed from others?**
 - a. New Workspaces can only be created by a member of the Altvia team. Please reach out to your CSM to set up a new Workspace for a given use case.
- 9. Can multiple workspaces be connected to my instance of AIM and be used with Investor Correspondence?**
 - a. Yes, all Workspaces in a single Workspace Hub offer the ability to use Investors Correspondence to distribute documents and information to ShareSecure.