CyberVault Data Room:

Quick Start Guide

Accepting an Invitation:

1. Receive email "Invitation to Data Room: [Name of Data Room]".

2. Use the "Click Here to Register" link in the email to accept the invitation.

3. Create a password.

4. Insert information in the registration message box and accept Terms of Use.

5. Click "Continue" and you are taken to the Data Room Info Tab.

6. Enter the PIN when received via email.

7. Accept Data Room's Terms of Use in the Info tab, if shown.

Adding a Folder to the Data Room:

1. When in the Folders tab, click on "Add Folder" at the top-right of your screen

2. Name and describe the folder.

3. You will now be in the new folder

   NOTE: Folder description and name can be changed at the drop-down menu at Modify link. The folder also can be copied, moved, and deleted at that link. The history of the folder can be viewed from the drop-down menu at the View link.

Uploading Documents:

1. When in the Folders tab, click "Add Documents" at the top-right of the screen.

2. Drag and drop files into the outlined area or click "Select Files" from document/filestorage on the accessing device. The name(s) of the selected file appears above "Select File" in the message box.

3. Click "Upload".

4. When the upload is complete, you can change file name and enter description.

5. When done, click "OK".

Removing Documents:

1. Highlight the document in its folder by bringing the cursor over it.

2. Click anywhere except the file name. The details menu view will appear.

3. In the dropdown menu under "Modify", click "Delete".

4. Multiple documents can be deleted by using "Select Multiple Items" (upper-middle part of the folders page), click the box(es) next to the documents to be deleted, select "Delete Items" from the dropdown menu, then click "Apply".

Downloading Documents*:

1. Go to the "Folders" tab and click the folder with the document.

2. Click on the document you want to download, and the document will appear.

3. Download the document to storage on your local device.

Sending a Message to other Licensed Users or from the Data Room:

1. Go to the "Messages" tab.

2. Click "Send Messages" on the upper-right side of the blue "Messages" banner.

3. In the message block, choose recipients with the person icon at end of the recipient's field or enter email address if known (only Data Room members), type in the subject and message, and click "Send".

4. Links to a document and message can be sent from the folders tab by either using "Send Securely" at the top-right of the screen or by highlighting the document in the folder and using "Send Securely".

Searching a Data Room:

1. Type search term in the block next to "Go" in the upper-right corner.

2. Click "Go".

3. When the search box appears on left, use "Go" to continue the search.

Seeing Members of Data Room*:

1. Click the members link at the top-left of the screen below the Data Room name.

2. A list of members will appear in a message box.

Granting Others Access to the Data Room (Adding Users) *:

1. Click "Invite" below the Data Room name.

2. Add email address(es) in the "Recipients" box, one per line.

3. Select a permission group for invitee(s).

4. Type invitation text you believe is needed.

5. Click "Invite".

Ending Access to the Data Room (Removing Members) *:

1. Click the "Data room Administration" tab.

2. Click "Users and Groups" in the left margin.

3. Click "Member Management" in the left margin.

4. Click "Remove Members from Data room" at the top.
   NOTE: Ownership of the documents assigned to the member being removed must be reassigned when prompted.

Leaving Data Room / RegDOX Data Room Service Application:

1. Click "Logout" in the top-left corner.

   NOTE: Logout is automatic after 60 minutes of inactivity.

Re-Entering a Data Room:

1. Access https://secure.cybervaultapp.us from any browser.

2. Enter your username and password.

3. Click "Login" and enter the PIN when you receive it.

More Help / Support:

1. Click "Help" at the top-right of any screen and the User Manual will open.

2. Click "Support" at the top-right of any screen to find:

    *   Email for Customer Support

    *   Your Data Room Managers