Introduction to Managing Documents in QapMap

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Data room helps you organize and give access / permissions to documents related to transactions, grants, etc., that need to be shared with investors, advisors, or employees.

Types of Data Room:

I. **System Generated**: Equity Awards & Transactions fall under this category. You can only view and download either the entire folder or individual document.

1. **Equity Awards** – Grant Letters Data Room: Whenever you create a new grant award (Option/Share/SARs) and associate a grant letter, the system will automatically save a copy of the grant letter under the respective award type folder.

   You can view and download the entire folder or individual file from the folder.

2. **Option Awards** – Exercise Forms Data Room: Whenever the Exercise Consent Form is configured with the Exercise Flow and the employee submits an exercise request, the system will automatically save a copy of the Consent Form under   the Exercise Form folder.

   Note: When the exercise request is deleted, concerned exercise form will get deleted automatically from the folder.
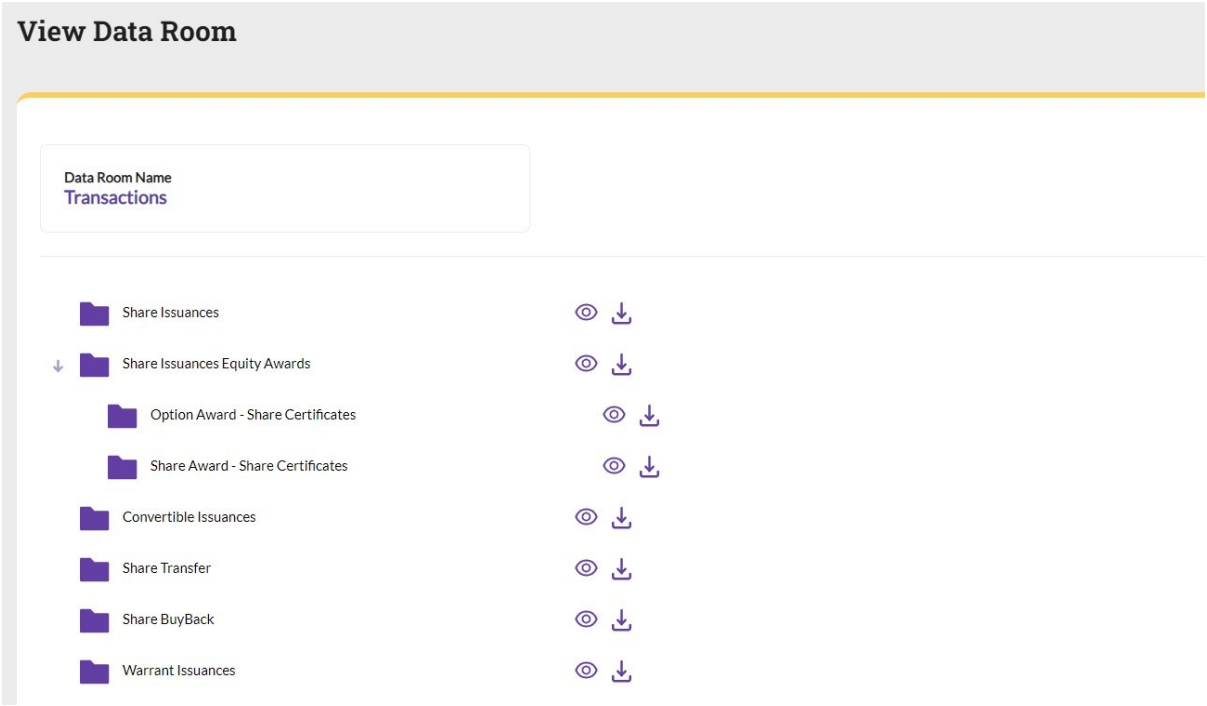

3. **Option Awards** – Surrender Form Data Room: Whenever Surrender Consent Form is configured with the Surrender Flow and the employee submits a Surrender Request, the system will automatically save a copy of the Consent Form under the Surrender Form folder.

   Note: When the surrender request is deleted, concerned surrender form will get deleted   automatically from the folder.
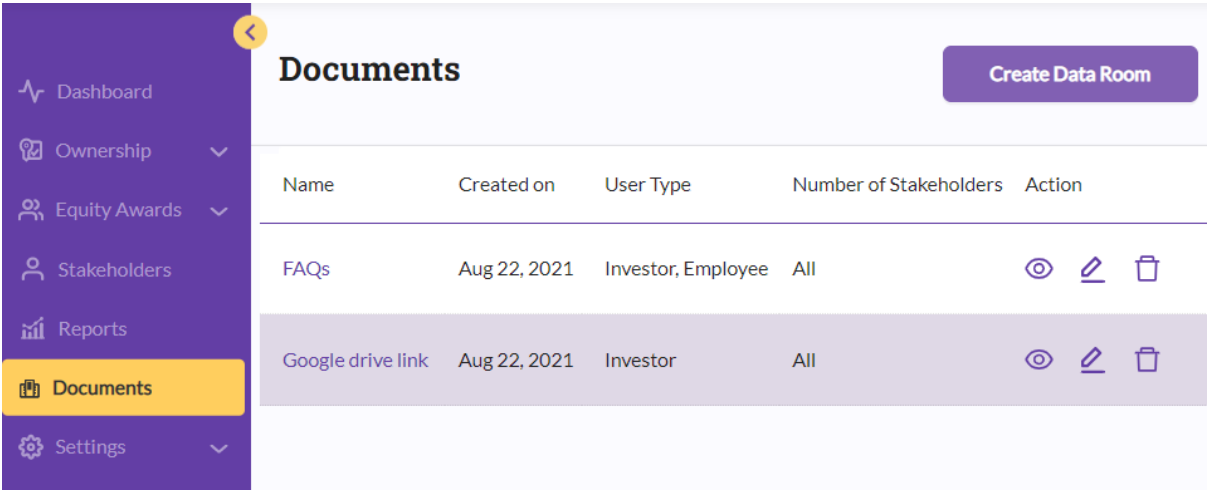

4. **Transactions Data Room**: Based on the transaction type, whenever a certificate document is associated, the system will automatically save a copy of the document under respective transaction folder.

View Data Room

Data Room Name
Transactions

📁 Share Issuances   👁 ⬇

 ↓ 📁 Share Issuances Equity Awards   👁 ⬇

     📁 Option Award - Share Certificates   👁 ⬇

     📁 Share Award - Share Certificates   👁 ⬇

📁 Convertible Issuances   👁 ⬇

📁 Share Transfer   👁 ⬇

📁 Share BuyBack   👁 ⬇

📁 Warrant Issuances   👁 ⬇

II. **Custom**: You can Create, Edit, Delete, Download the entire data room or any specific document(s) in the data room and Notify (share) the data room to any specific Individual(s).

To add a document to the Data Room:

1. Click **Documents** on the left menu. The main Documents page is displayed.
2. Click **Create New Data room**.

Documents   [Create Data Room]

Name	Created on	User Type	Number of Stakeholders	Action
FAQs	Aug 22, 2021	Investor, Employee	All	👁 ✎ 🗑
Google drive link	Aug 22, 2021	Investor	All	👁 ✎ 🗑

Left menu:
- Dashboard
- Ownership ⌄
- Equity Awards ⌄
- Stakeholders
- Reports
- Documents
- Settings ⌄

3. In the displayed Create Data Room, enter the **Data Room Name**.

4. To add a document, click **New** and select:

- **Create New Folder** to add a new folder. You can then add document(s) to it.
- **Upload a Folder** to upload a folder with all documents.
- **Upload File** to add a single document.

5. Click **Configure Access** to grant permissions to stakeholders for the data room.

6. Providing **Access to Documents – By Role**

7. Click **By Role** to provide access to the data room according to the role assigned to a user.

Providing Access to Documents – By Stakeholder

8. Click **By Stakeholders** to provide access to one/ more users individually.

9. Click **Filter users** and select the type of stakeholder. The list of stakeholders is displayed. You can select specific stakeholders or select all stakeholders.

10. Click **Add**.

11. Click **Create Data Room** to complete the process.

To Edit the Data Room:

1. Click Edit Icon visible under Actions column.

2. Clicking on the Edit icon, you can perform the following actions:

a. Rename the data room name

b. Delete a folder (if existing) or a file (if any)

c. Create a new folder / Upload a new folder / Upload a file

d. Change the existing access configuration or grant access to new roles/stakeholders.
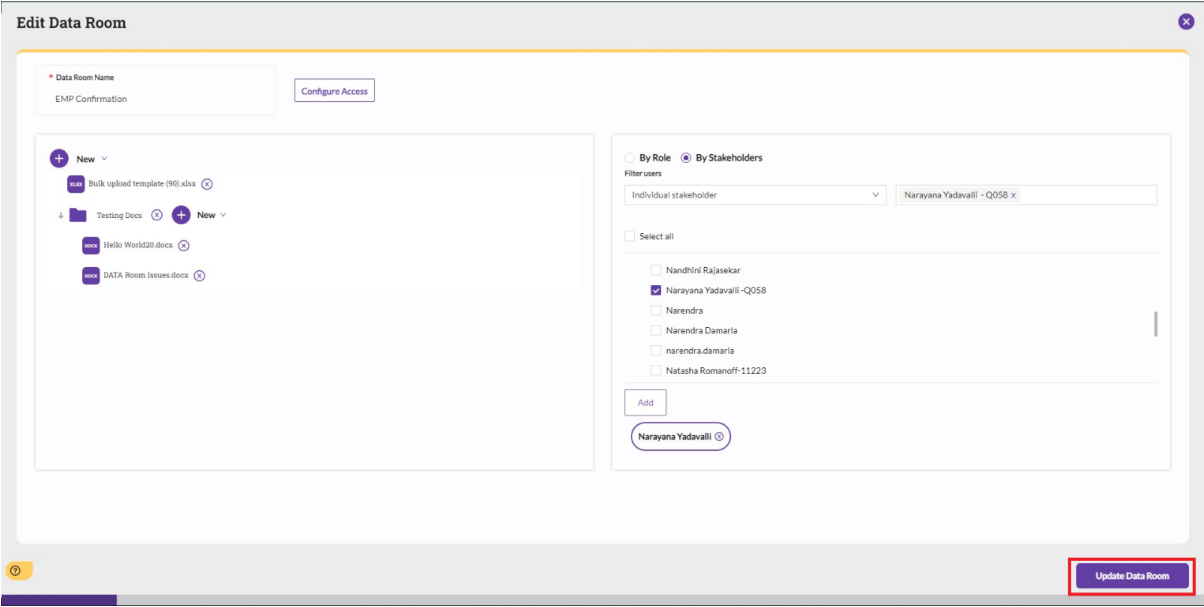
Note: To save the changes made to the dataroom, click on the Update button. Edit option is not enabled for system generated folders "Equity Awards" & "Transactions".

1. To view the modified changes, click on View Icon.

To Delete the Data Room:

Note: You cannot delete "System Generate" data rooms (Equity Awards & Transactions).

1. To delete the complete data room folder, click on the Delete Icon.

2. To delete the Individual Folder or File in the data room folder, click on the highlighted icon.
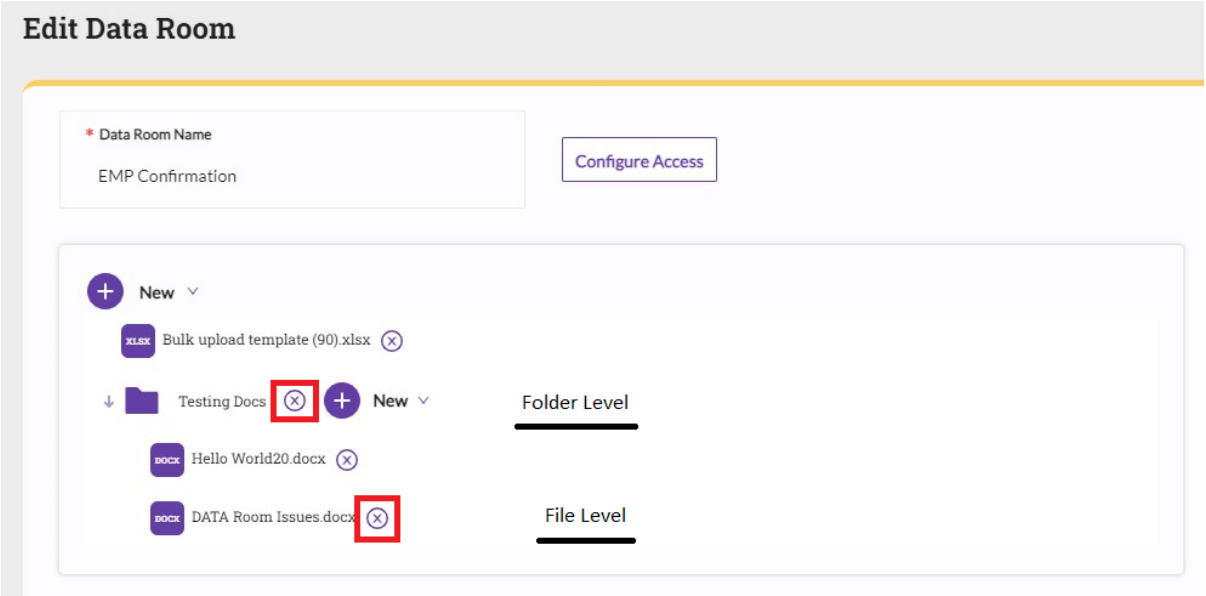
To Download the Data Room:

Note: Apart from the newly created data room, you can also download "System Generated" data room.

1. Click on Download Icon visible under the Actions column.

   a. You can download the entire data room folder from the documents screen.

    b. You can also download individual folders / files available in each dataroom.

To Notify the Data Room Users:

1. To Notify Users, Click on Message Icon.

Note:

1. **Notify Users option is disabled for system generated folders.**
2. **Notify Users option will get disabled if folder is empty or access is not configured.**