

# Message Man Documentation

The web-based Message Man application is accessible at the following URL: <http://myapps/msgman/>

## Getting Started

### Creating Your Subscription (New Users):

Viewing comments of companies you are subscribed to or managing your subscription settings can all be completed from the home page

(accessible using <http://myapps/msgman/> or <http://myapps/msgman/home.aspx>)

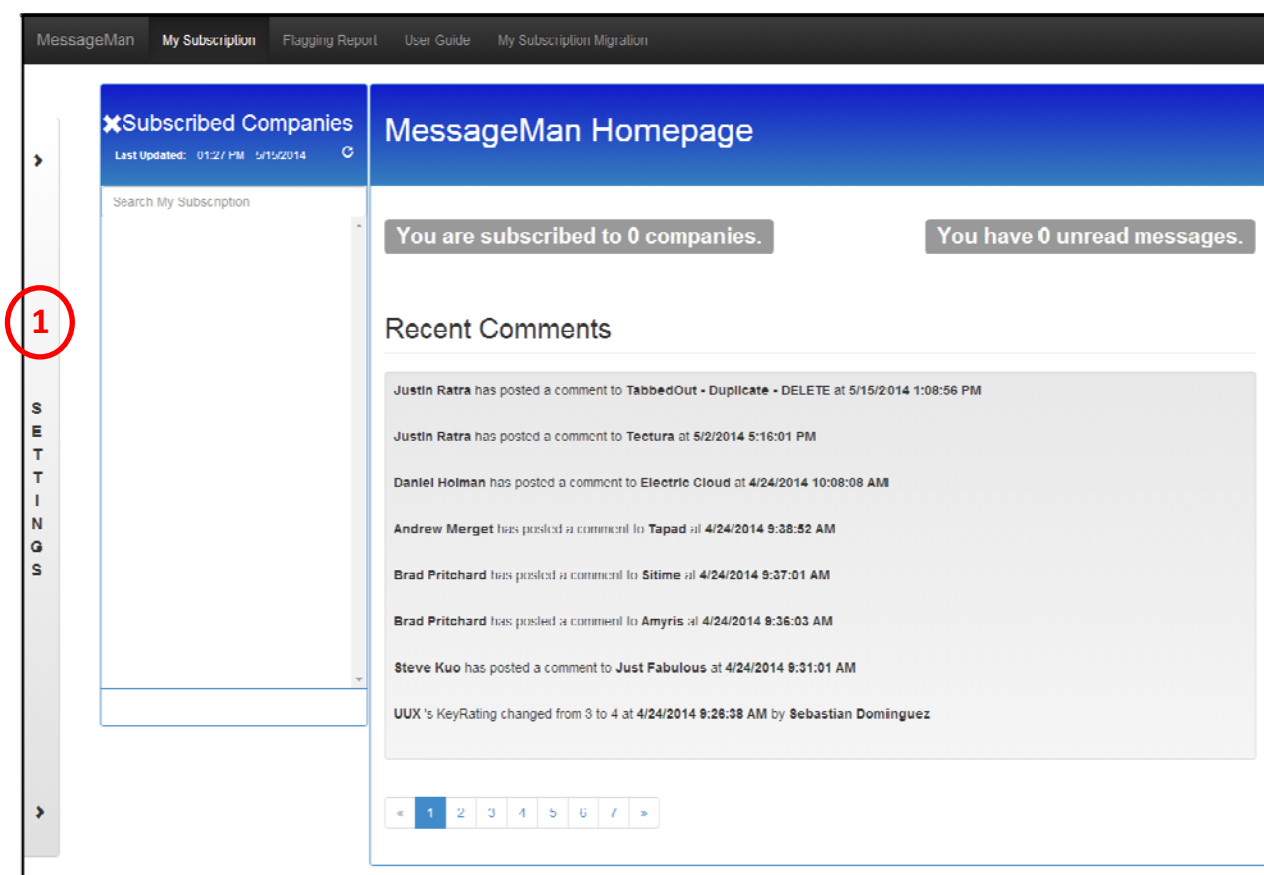


Figure 1 - Home Page

On the left hand side of the page there should be a large slim button which reads "Settings," located at Fig. 1 - Label 1. Clicking on this button will expose the settings menu (see Fig. 2), which allows you to edit your subscription or change any of your settings.

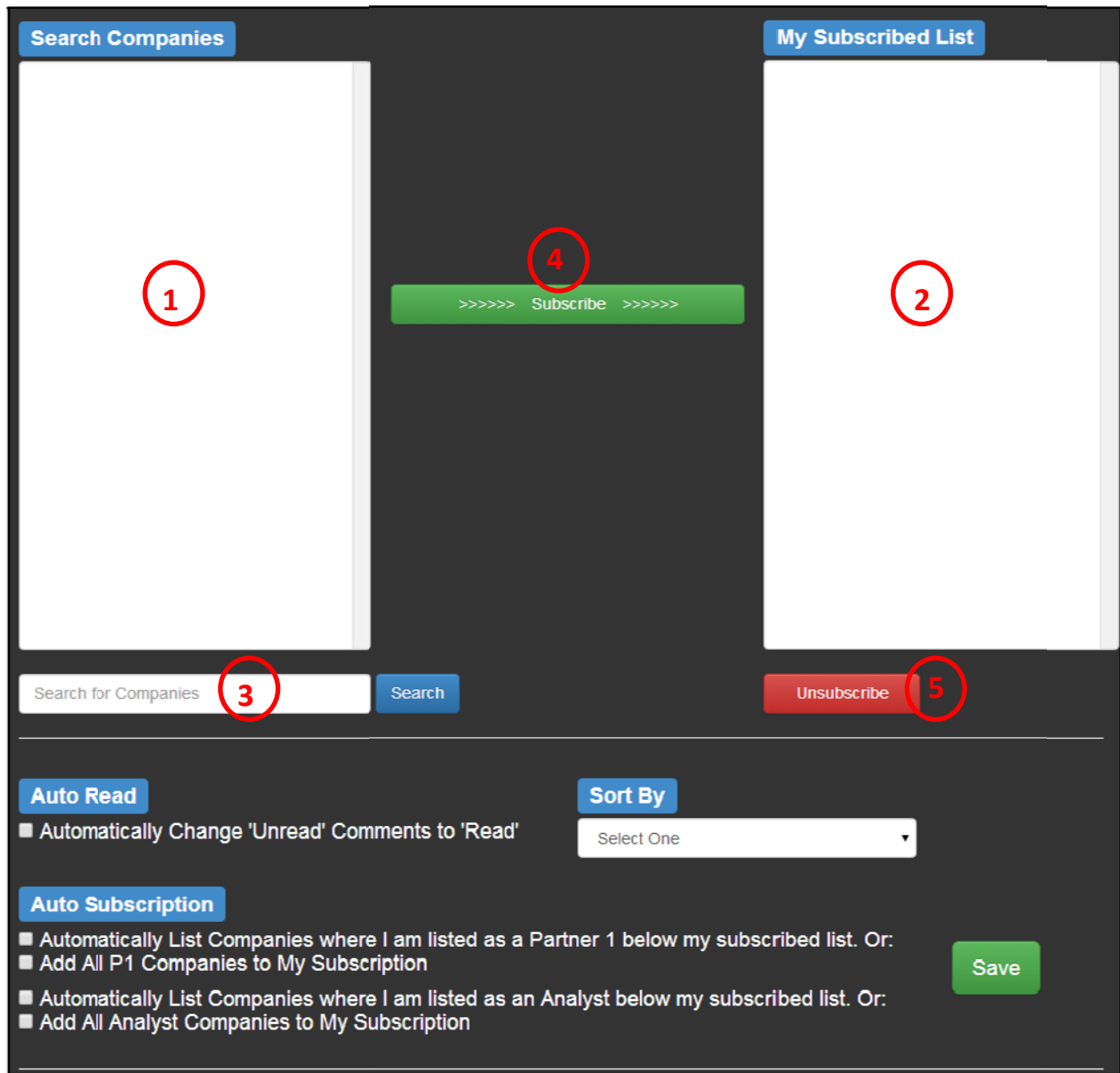


Figure 2 - Subscription Settings Menu

Your list of subscribed companies is displayed in the right most text window located at Fig. 2 - Label 2.

To add companies to your subscription:

1. Search the company by using the text box and button located at Fig. 2 - Label 3.
2. The search results will be returned to the left select window located at Fig. 2 - Label 1.
3. Highlight one or more companies from the search results (Fig. 2 - Label 1) and click the Subscribe Button located at Fig. 2 - Label 4.
4. All the companies you have selected will be copied to your subscription list (Fig. 2 - Label 2).

To remove companies from your subscription:

1. Highlight one or more companies from your subscription list (Fig. 2 - Label 2).
2. Click the Unsubscribe Button located at Fig. 2 - Label 5.
3. All of the companies you have selected will be removed from your subscription list.

### Migrating Your Subscription (Previous Users):

If you have not used a previous version of MessageMan, feel free to skip ahead to “Managing Your Subscription”.

If you have used the windows application version of MessageMan, navigate to the My Subscription Migration tab (located in the top navigation menu) to transfer the data from the windows application to the web application.

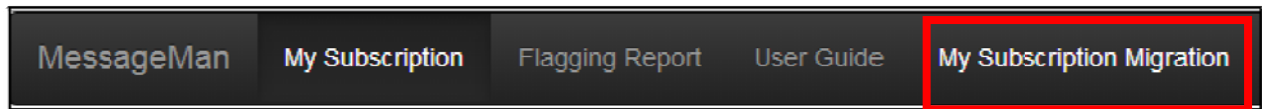


Figure 3 - MessageMan Navigation Menu

On the ‘My Subscription Migration’ page, there are two spaces to upload files and an upload button. The default path of each file to be uploaded is written directly under each “Choose File” button (highlighted in yellow below).

*Note: The path to the MessageMan data files may need to be typed in an explorer window’s address bar manually since the C:\ProgramData folder is hidden by default.*

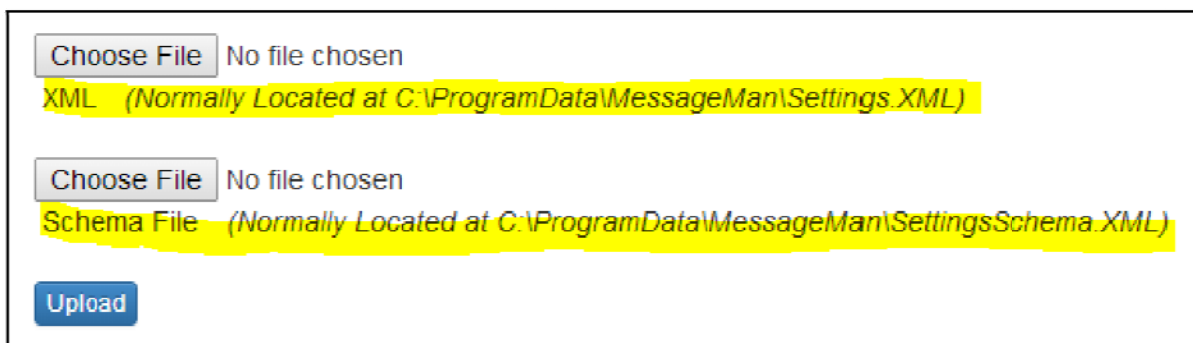


Figure 4 - Subscription Migration Page

After selecting the two files click the blue upload button, and wait patiently until you see the following text:

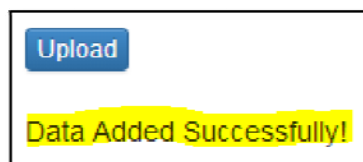


Figure 5 - Subscription Successfully Migrated

## Managing Your Subscription

### Viewing Comments from your Subscription

Once you are subscribed to some companies, you will see your subscription list on the homepage populate with some data.

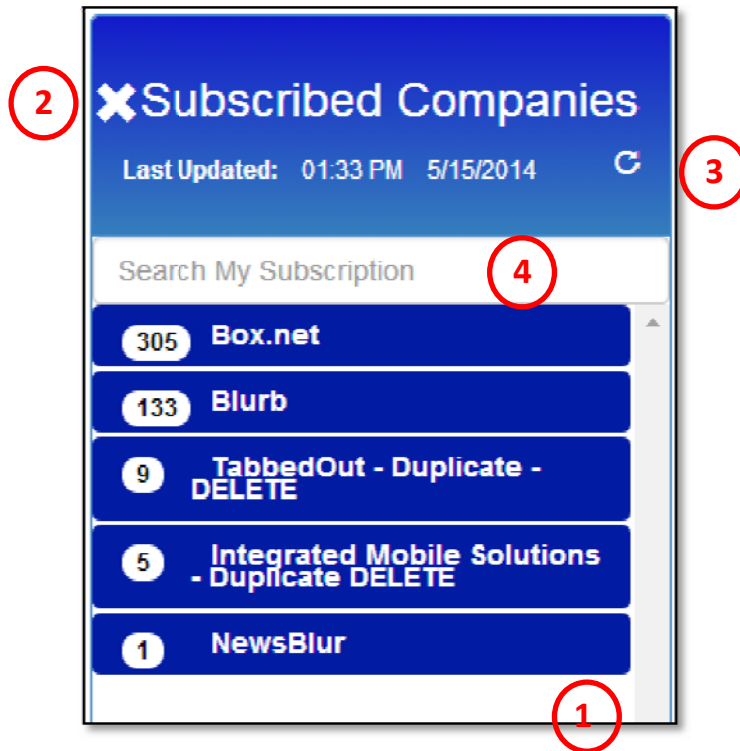


Figure 6 - Subscription List

All the companies in your subscription list appear in the left most text window located at Fig. 6 - Label 1.

This list is automatically refreshed every 15 minutes, and the date and time it was last updated is indicated at Fig. 6 - Label 2. You can manually refresh this list by clicking the refresh icon located at Fig. 6 - Label 3.

Companies highlighted in dark blue indicate there are new comments posted that you have not read.

The number of unread comments is placed in a bubble to the left of the company name.

By typing in the textbox located at Fig. 6 - Label 4, you can immediately filter your list to only show companies including your search string.

This list will always follow you as you scroll up and down the page. You can disable this feature by clicking the "X" icon located above Fig. 6 - Label 2.

If the company is highlighted in light blue (see Fig. 7 - Label 5), this means you have selected the company and its data and comments will be loaded into the page:

**Subscribed Companies**  
Last Updated: 02:13 PM 5/15/2014

Search My Subscription

- 305 Box.net
- 133 Blurb
- 0 Integrated Mobile Solutions Duplicate DELETE
- 1 NewsBlur
- 0 TabbedOut Duplicate DELETE

**Integrated Mobile Solutions - Duplicate DELETE's Comments:**

Key Rating: 5 Total Raised: \$0.00 Million Total Exposure: \$0

Note: All unread comments will automatically be set as 'Read' after the first viewing (This can be disabled in the settings menu)

Add New Comment (show)

Legend (click to filter): Unread Comment Saved Comment Hidden Comment --- Clear Filters

Quick Search:

Integrated Mobile Solutions - Duplicate DELETE	2/19/2014 2:39:51 PM	Christian Follmann	Unread
Integrated Mobile Solutions - Duplicate DELETE	2/19/2014 11:36:33 AM	Christian Follmann	Unread
Integrated Mobile Solutions - Duplicate DELETE	2/19/2014 11:32:34 AM	Christian Follmann	Unread
Integrated Mobile Solutions - Duplicate DELETE	4/15/2008 11:16:48 AM	Erik Terjesen	Unread
Integrated Mobile Solutions - Duplicate DELETE	7/19/2004 12:00:00 AM		Unread

Figure 7 - View Comments - Company Selected

Clicking the company link on top, located below Fig. 7 - Label 1, will create a new tab in your browsing window, directing you to the company's page in DB4. Below the company link are a few pieces of data about the company. Also you may quickly subscribe or unsubscribe to the company by using the buttons located below Fig. 7 - Label 2.

The company's comments are all loaded in the table below Fig. 7 - Label 3. Table rows highlighted in yellow indicate an unread comment.

Typing into the search box, located at Fig. 7 - Label 3, will allow immediate filtering of the comments, showing only comments containing your search string.

## Three Ways to Change Comment Statuses

### 1 - Change Individually (Manual)

Whenever you place your mouse over a comment, a "Mark As" dropdown button appears on the right-hand-side of the comment:

Company	Date/Time	Employee	Status
Integrated Mobile Solutions -			
<input type="checkbox"/> Duplicate DELETE	2/19/2014 2:39:51 PM	Christian Follmann	Unread
KeyRating changed from 2 to 5			
Integrated Mobile Solutions -			
<input type="checkbox"/> Duplicate DELETE	2/19/2014 11:36:33 AM	Christian Follmann	Unread
KeyRating changed from 3 to 2			
Integrated Mobile Solutions -			
<input type="checkbox"/> Duplicate DELETE	2/19/2014 11:32:34 AM	Christian Follmann	Read
KeyRating changed from 7a to 3			

Figure 8 - View Comments - Mouse Over Comment

Click the “Mark As” button to reveal the possible statuses the comment can be changed to: “Read”, “Unread”, “Saved” , or “Hidden”:

Company	Date/Time	Employee	Status
Integrated Mobile Solutions -			
<input type="checkbox"/> Duplicate DELETE	2/19/2014 2:39:51 PM	Christian Follmann	Unread
KeyRating changed from 2 to 5			
Integrated Mobile Solutions -			
<input type="checkbox"/> Duplicate DELETE	2/19/2014 11:36:33 AM	Christian Follmann	Unread
KeyRating changed from 3 to 2			

Figure 9 - View Comments – Mouse Over Comment - 'Mark As' Button Clicked

Select one of the choices from the dropdown to immediately change the status of the specific comment.

## 2 - Change Multiple (Manual)

If you would like to change the status of more than one comment at the same time, you must first select all of the comments you would like to change by checking the check box on the left side of each comment:

Company	Date/Time	Employee	Status
Integrated Mobile Solutions -			
<input type="checkbox"/> Duplicate DELETE	2/19/2014 2:39:51 PM	Christian Follmann	Unread
KeyRating changed from 2 to 5			
Integrated Mobile Solutions -			
<input checked="" type="checkbox"/> Duplicate DELETE	2/19/2014 11:36:33 AM	Christian Follmann	Unread
KeyRating changed from 3 to 2			
Integrated Mobile Solutions -			
<input checked="" type="checkbox"/> Duplicate DELETE	2/19/2014 11:32:34 AM	Christian Follmann	Read
KeyRating changed from 7a to 3			

Figure 10 - View Comments - Multiple Comments Selected

Selected comments will be highlighted with a dashed, black border.

You should notice that after you have selected all of the comments with statuses you would like to change, the associated "Mark As" button has slightly changed to a "Mark Selected As Button." By selecting a new status from this dropdown, you will see all of the selected comments change status.

Additionally, you may change the status of all comments for a company by hovering over its name in your subscription list and clicking one of the buttons that appear (see Fig. 11).



Figure 11 - View Comments - Mark All Comments As \_\_\_\_\_ Manually

### 3 - Change All (Automatic)

By modifying one of the subscription settings, all comments that are marked as "Unread" would automatically be changed to "Read" after the first viewing.

This setting can be enabled by navigating to the lower section in the settings menu (see Fig. 12).

**Search Companies**

Search for Companies

**My Subscribed List**

Blurb  
Box.net  
Hightail - delete - duplicate  
Integrated Mobile Solutions - Duplicate D  
TabbedOut - Duplicate - DELETE

>>>>>  >>>>>

**Auto Read**

☒ Automatically Change 'Unread' Comments to 'Read'

**Sort By**

Number Of Unread Comments ▼

**Auto Subscription**

☒ Automatically List Companies where I am listed as a Partner 1 below my subscribed list. Or:  
■ Add All P1 Companies to My Subscription

☐ Automatically List Companies where I am listed as an Analyst below my subscribed list. Or:  
■ Add All Analyst Companies to My Subscription

Figure 12 - Subscription Settings

Checking the first checkbox (see Fig. 13 - Label 1), and then clicking the Save Button (see Fig. 13 - Label 2) will enable “Auto-Read.”



**Auto Read** 1

☒ Automatically Change 'Unread' Comments to 'Read'

**Sort By**

Number Of Unread Comments ▼

**Auto Subscription**

- ☒ Automatically List Companies where I am listed as a Partner 1 below my subscribed list. Or:
  - ☐ Add All P1 Companies to My Subscription
- ☐ Automatically List Companies where I am listed as an Analyst below my subscribed list. Or:
  - ☐ Add All Analyst Companies to My Subscription

2

**Save**

Figure 13 - Subscription Settings - Auto Read

You can confirm auto-read has been enabled correctly, by verifying the following warning message is located above the "Add New Comment" section (see Fig. 14).

**Integrated Mobile Solutions - Duplicate DELETE's Comments:**

Key Rating: 5    Total Raised: \$0.00 Million    Total Exposure: \$0    [Subscribe](#) [Unsubscribe](#)

Note: All unread comments will automatically be set as 'Read' after the first viewing. (This can be disabled in the settings menu).

Add New Comment (show)

Legend (click to filter): [Unread Comment](#) [Saved Comment](#) [Hidden Comment](#) --- [Clear Filters](#)

Quick Search:

Figure 14 - Auto-Read Warning

While this setting is enabled, all comments marked 'Unread' will automatically be changed to 'Read' after you have viewed them once. It is important to take note that all Saved or Hidden comments will not be affected. Saved and Hidden comments will keep their status until changed using one of the manual methods.

## Additional Features and Settings

### Comment Statuses and Filters

Read – Indicates a message that has been previously viewed through the Message Man web application.

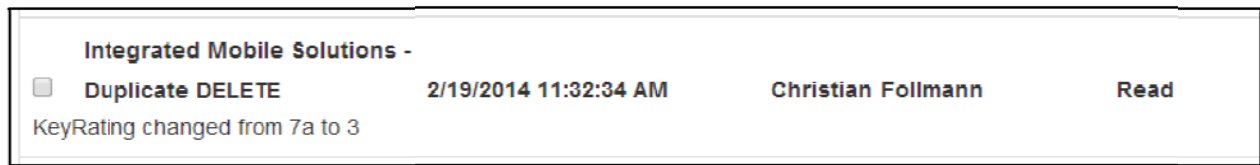


Figure 15 - Comment Marked 'Read'

Unread – indicates a new message (highlighted yellow) that you have not viewed through the Message Man web application.

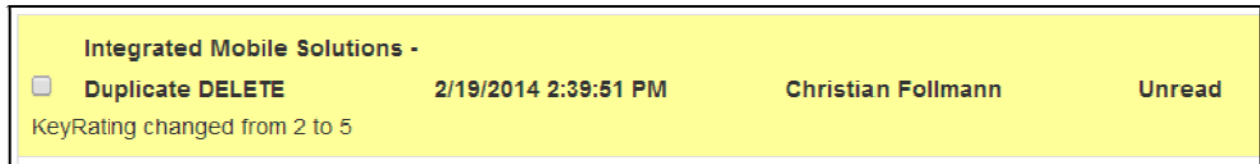


Figure 16 - Comment Marked 'Unread'

Saved – Indicates an important message (highlighted green) that you would like to refer back later.

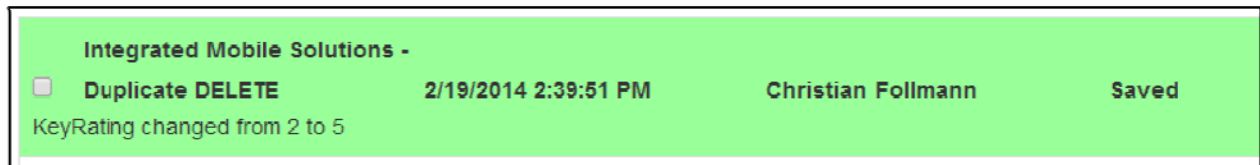


Figure 17 - Comment Marked 'Saved'

Hidden – Indicates an unimportant message (highlighted gray) to be condensed and minimized.



Figure 18 - Comment Marked 'Hidden' - Hidden

Placing your mouse over the hidden comment will temporarily reveal the comment's content:

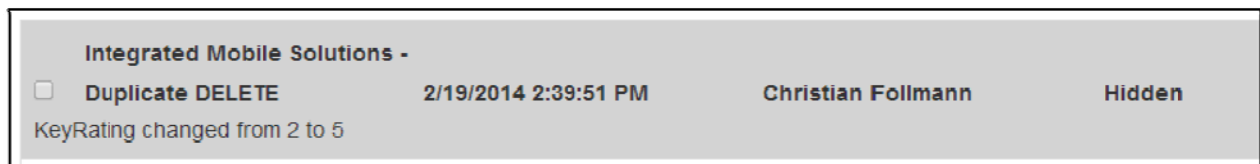


Figure 19 - Comment Marked 'Hidden' - Shown

The purpose of the legend is not only to remind you what the comment's highlighted color tells you about its status, but also to filter the comments to be displayed.

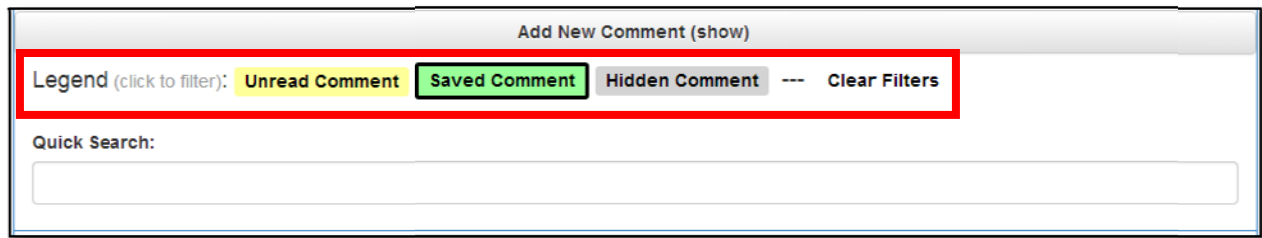


Figure 20 - Comments Legend

By clicking one of the comment types (unread, saved, or hidden), only those comments will be displayed.

*Note: Only one comment type can be selected at a time.*

The comment type selected will be emphasized with a black border. In Figure 20, “Saved Comment” is selected.

## Comment Settings

Located in the Settings Menu on the left side of the screen (refer back to the bottom of Fig. 2) are various options to alter how your data is organized.

*Note: Any settings set or changed in this section will not be put in effect until after the ‘Save’ button is clicked.*

### Sort By

The ‘Sort By’ setting allows you to change the order in which all the companies in your subscription list are displayed.

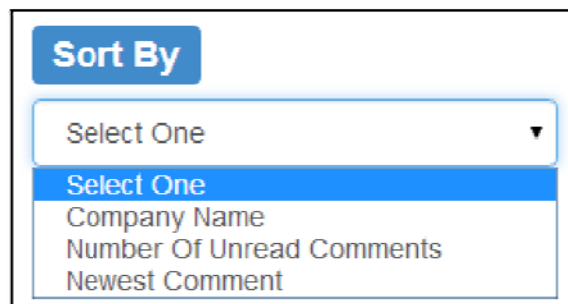


Figure 21 - Comment Settings - Sort By

There are currently three different criteria to sort by: company name, number of unread comments, or newest comment.

## Auto Subscription

This feature allows you to enable additional subscription lists that are automatically populated based on your relationship as a Partner 1 or Analyst with companies.

**Auto Subscription**

☒ Automatically List Companies where I am listed as a Partner 1 below my subscribed list. Or:  
☐ Add All P1 Companies to My Subscription

☒ Automatically List Companies where I am listed as an Analyst below my subscribed list. Or:  
☐ Add All Analyst Companies to My Subscription

Figure 22 - Comment Settings - Auto Subscription

The first check box enables a dropdown below your subscription list (see Fig. 23 - Label 1) that is populated with all the companies where you are listed as Partner One.

The third check box enables a dropdown below your subscription list (see Fig. 23 - Label 2) that is populated with all the companies where you are listed as an Analyst.

**Subscribed Companies**  
Last Updated: 02:42 PM 5/15/2014

Search My Subscription

305 Box.net

133 Blurb

1 NewsBlur

0 Integrated Mobile Solutions - Duplicate DELETE

0 TabbedOut - Duplicate - DELETE

**Partner 1 Companies** 1  
Select One

**Analyst Companies** 2  
Select One

Figure 23 - View Comments - Subscription Menu

The 2<sup>nd</sup> and 4<sup>th</sup> checkboxes (from Fig. 22), respectively, add all of your current Partner One and Analyst companies directly to your subscription list, instead of creating separate dropdown boxes below your list.

Always remember to click the save button to make sure any changes you apply to your settings will go into effect.

## News Feed

The home page to Message Man, as seen in Fig. 1, list a few details about your personal subscription (see Fig. 24 - Label 1), as well as a "news feed," or "recent comments," section. This grayed out section (see Fig. 24 - Label 2) displays the most recent 50 comments or key rating changes. You can scroll through the news feed using the paginated buttons (see Fig. 24 - Label 3).

As long as it is not a key rating change, clicking any of the line items in the news feed (e.g. Fig. 24 - Label 2) will load the associated comment directly beneath it.

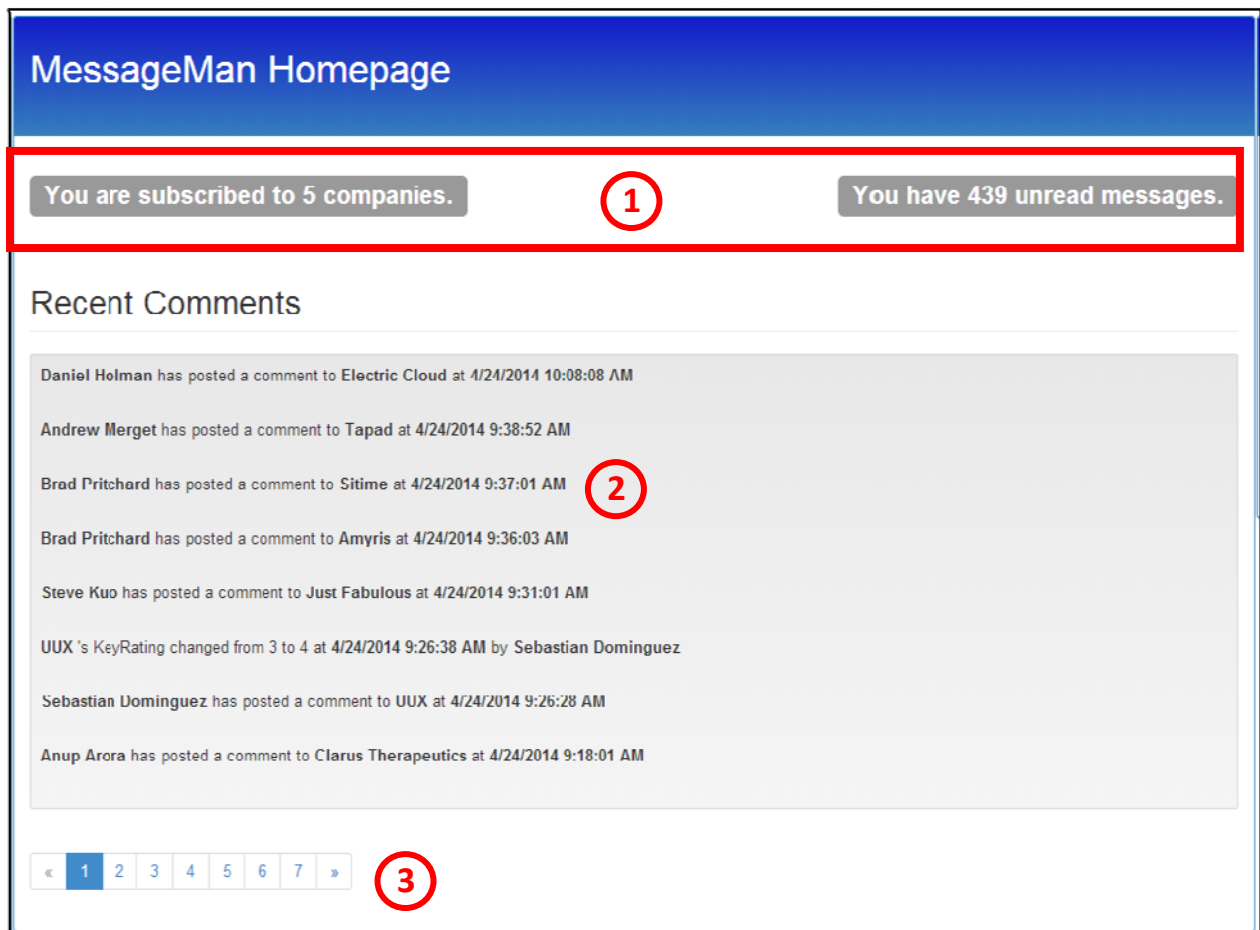


Figure 24 - MessageMan Home Page - News Feed

## Flagging Report Page

This page is accessed by clicking on the Flagging Report link (Fig. 25) from the top navigation bar (or by navigating directly to <http://myapps/msgman/alerts.aspx> )

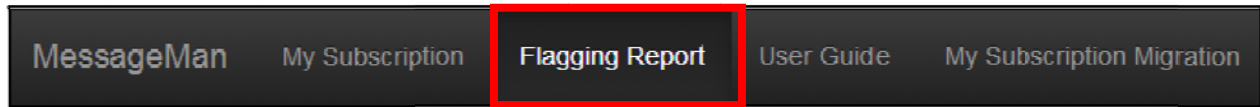


Figure 25 – MessageMan Navigation Menu

This purpose of this page is to view when the last comment was posted for specific companies. Companies are flagged if the number of days since the last comment exceeds an allotted time determined by the company's key rating.

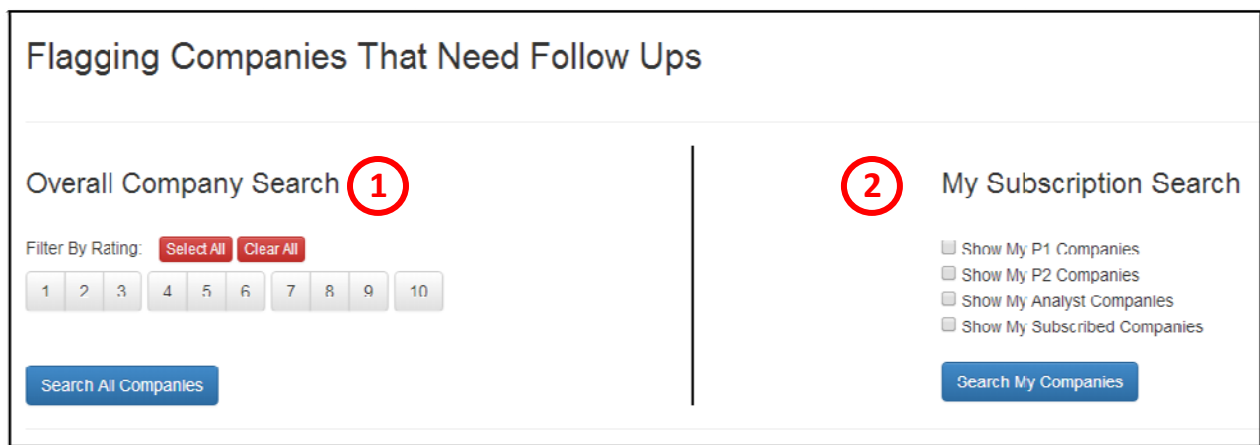


Figure 26 – Flagging Report Page

The search function on the page is split up into two different sections. The left section (Fig. 26 – Label 1) allows the user to search all companies by key rating. The right section (Fig. 26 – Label 2) allows the user to search companies that he or she is subscribed to or companies that he or she is related to (as Partner 1, Partner 2, or Analyst).

After selecting a few filters and clicking the respective search button, a table (see Fig. 27) should be appended to the bottom of the page.

Company Name <sup>1</sup>	Key Rating	Days Since Last Comment	Last Comment <sup>2</sup>	Flagged? <sup>2</sup> ▼
John Doe	John Doe	10..20 =50	-7..0	10..20 =50
Coho Data - delete duplicate	5	135	11/05/2013 07:46 AM	1
Blurb Equity	10	91	12/19/2013 09:00 AM	1
TabbedOut - Duplicate - DELETE	5	65	01/14/2014 03:10 PM	1
Blurb	10a	29	02/19/2014 09:59 AM	1
NewsBlurb	5	911	09/21/2011 10:58 AM	1
Hightail - delete - duplicate	5	121	11/19/2013 02:15 PM	1
Fluc	10	6	03/14/2014 11:06 AM	0
Tectura	10	2	03/18/2014 05:48 AM	0
Integrated Mobile Solutions - Duplicate DELETE	5	29	02/19/2014 02:39 PM	0
Nest	7f	66	01/13/2014 01:40 PM	0
PixelOptics	9	3	03/17/2014 02:08 PM	0

Rows 1-11 of 11

« 1 2 3 4 5 » Rows ▲ Columns ▲

**Figure 27 – Flagging Report**

By default the table is sorted to list flagged companies first. The default criteria for flags can be seen by hovering the mouse over the info icon (Fig. 27 – Label 2) next to the ‘Flagged?’ column header.

Clicking on any of the column titles (Fig. 27 – Label 1) will allow the user to change how the table data is sorted. In addition, columns can be filtered by typing into the grayed out text-boxes directly beneath each column header.

By default the table only displays 30 results at a time. You can browse through more results by changing the page number or clicking the arrows at the bottom of the table (Fig. 27 – Label 5). Also, clicking on the ‘Rows’ button (Fig. 27 – Label 3) will allow the user to change the number of rows to be displayed per page.

Clicking the ‘Columns’ button (Fig. 27 – Label 4) enables the user to view additional columns of data, such as Partner 1, Analyst, Status, and so on.

Finally, clicking the timestamp (Fig. 27 – Label 6) of any company’s last comment will load the company’s last three comments at the bottom of the page.

## Additional Questions

If you have any additional questions, comments, or concerns feel free to contact Justin Ratra at [jratra@htgc.com](mailto:jratra@htgc.com)