



Information classification: Internal

BRAINLOOP SECURE CLIENT FOR WINDOWS 1.53

User Guide

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1 Overview

1.1 KEY FEATURES

Brainloop Secure Client for Windows allows you to access your Brainloop Datarooms directly from your mobile device or desktop, for example Windows Surface, Windows Desktop PC or tablet.

The key features of the app are:

- > Access all important documents, Boardbooks (document collections), votes and calendar events from the Home screen with one tap
- > Download documents from your Dataroom to your device to have them ready at hand anytime and anywhere
- > Comment privately on Brainmark documents directly on your device and, if required, share these documents with other Dataroom members
- > Send documents securely from within the app both to other Dataroom members and to externals
- > Add documents to your Favorites list to quickly access them again
- > Access your most important files conveniently from the **Recently viewed** and **Recently changed** areas on the Home screen
- > View and respond to Dataroom calendar events quickly and conveniently
- > Access Dataroom vote items and cast your vote directly from your mobile device
- > Sync with your Dataroom with one tap from the Home screen and view sync progress
- > View timestamp and update status of your documents, events and votes

1.2 NAVIGATION

Navigation through the Brainloop Secure Client by default starts from the **Documents** screen. You can access all areas with one tap via a filter button or the navigation bar at the top and at the bottom each.

The following table lists the navigation and filter elements available on the **Documents** screen:

Screen element	Navigation
Top navigation bar	The navigation bar provides the lock icon , the sync icon  with date and time stamp, the synchronization progress bar, the activity indicator , and the back icon . On the Documents and the Datarooms screen, the navigation bar additionally contains a search icon . This icon can be used to search for document names and for document content. Note: The activity indicator is only displayed during synchronization. The back icon is only available in the folders view.
Filter buttons	These buttons allow you to filter by Boardbooks, Favorites, Recently viewed and Recently changed. The filter views show documents from all Datarooms that are connected and synchronized with the app. Note: Boardbooks are a type of document collection. The Boardbooks filter button is only available if document collections are available in connected Datarooms. The Favorites filter button is only available if any documents are marked as favorites in connected Datarooms.
Side navigation bar	The side navigation bar provides access to the Documents screen , which is also the start screen by default, the Votes screen , the Events screen , the Dataroom screen  and the Settings screen . Note: When not in use, you can hide the icons for Votes screen and Events screen in the Settings menu under View.

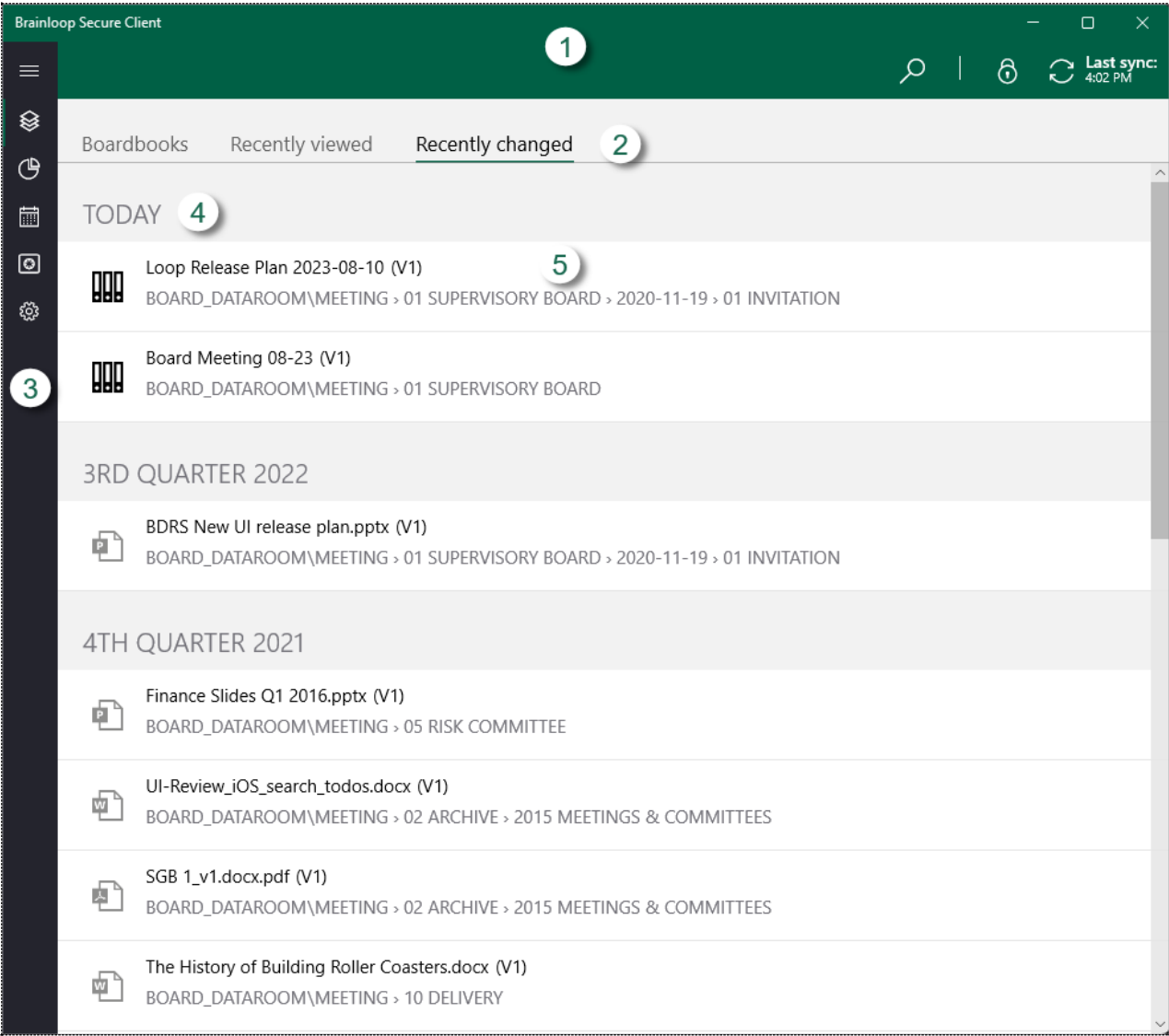
Hovering the mouse cursor over an icon displays the tooltip for the icon.

At every point of navigation, you can access folders or documents by tapping them once. When switching between screens, your previous filters, views or search results are kept and displayed when you access the screen again.

1.3 START SCREEN

You can access all documents, events and votes and all other available screens directly from the start screen.

The following figure shows the **Documents** screen:



1	Top navigation bar
2	Filter buttons
3	Side navigation bar
4	Time intervals
5	Document information

In general, all documents are automatically sorted by the following time intervals:

> Today

- > Yesterday
- > Current week
- > Last week
- > 2 weeks before
- > 3 weeks before
- > Current quarter
- > Last quarter
- > 3rd quarter
- > 2nd quarter
- > 1st quarter

1.3.1 AVAILABLE INFORMATION

The following table lists the document information provided on the start screen.

Information	Explanation
Document type	The document type is indicated by the appropriate document icon and file extension.
Document name	The document name is fully displayed.
Download status	The download status is indicated by the opacity of the document icon. If the document is downloaded, the document icon is fully visible; if not, it is displayed with an opacity of 30%.
Update status	An updated document is indicated by the icon  .
Marked as favorite	A document marked as favorite is indicated by the favorites icon  .
Comments	A document containing comments is indicated by the speech bubble icon  .
Dataroom name	The name of the Dataroom to which the document belongs is fully displayed.
Document path	The path to the document within the Dataroom is fully displayed.
Update information	It is displayed who has updated the document and when it has been updated.
Version number	The version of the document is displayed.
Document description	If available, the document description is displayed.

1.3.2 AVAILABLE ACTIONS

Depending on the point of navigation, Brainloop Secure Client offers different actions. The following table lists actions available from the top navigation bar in the **Documents** and **Datarooms** screens.

Action	Icon	Explanation
Search		Search for documents in the Documents screen and in the Dataroom screen. Once the search page is open, the filter option is available.
Filter		Filter documents within the search screen for name, change date, comments and recently viewed date. The filter option is also available for votes on the Votes screen and events on the Events screen.

The following table lists the actions available in the folders view.

Action	Icon	Explanation
Upload		Upload files from other apps into your Datarooms directly from within the Brainloop Secure Client app. Please note that this option also depends on your permissions.
Create new folder		Create new Dataroom folders directly from within the Brainloop Secure Client app.
Download		Download all documents from this folder and, if selected, from its subfolders to your device.
Delete		Delete the local copies of all documents in the folder selected and its subfolders

The following table lists the actions available on document level.

Action	Icon	Explanation
Send securely		Send documents securely to Dataroom members as well as to external users, i.e. to non-Dataroom members, from within the app. When a document is sent securely, a link to the item is sent to the recipients by email.
Share review		Share a document that contains your private comments with other Dataroom members. As soon as you share this document with others, your comments are no longer private and are thus visible to the reviewers.
Add to favorites		Add a document to your Favorites in the folders view / from the PDF Viewer.
Delete from device		Delete the local copy of a document to allow a download of it in another format.
Show all versions		Show all versions of a document in the Versions screen.
Download originals		Download original documents if permitted by the Dataroom configuration and security settings. The document is downloaded in the selected format. Note: Before downloading an original document, make sure to delete the local copy of it first.
Show votes		Display votes on a document directly from the Documents screen. If there is only one vote for the document, it is directly opened. If there are several votes for the document, a list of all votes is displayed. If there are no votes for the document, an appropriate message is displayed.

1.4 NAVIGATION WITHIN DOCUMENTS

The following table lists the navigation elements available in open documents:

Screen element	Navigation
Sidebar	The sidebar provides the search icon , the comments icon  and the contents icon . The contents icon is only available if the document includes a table of contents. The comments icon is only available if the documents contains comments and markups. If Boardbooks (document collections) contain sections defined in Brainloop Secure Dataroom, the sidebar by default displays a table of contents. To open the sidebar, tap the navigation icon  on the left-hand side at the top of the screen. To hide it, tap the icon again.
Page slider	The bottom bar provides a page slider and Back and Next buttons for flipping through the pages. The current and total number of pages are indicated on the page slider.

Tip: Preferences are remembered for a user's start screen. When opening a document another time, users will be taken exactly to where they left off and the settings will be the same.

1.4.1 COMMENT TOOLBAR

When you open a document, a toolbar with commenting and markup tools is available to the right. If the toolbar is hidden, click the expand icon. To hide the toolbar, click the collapse icon. The toolbar is always available except on the Thumbnail view. Precondition is that Dataroom settings and document status allow commenting.

Tapping a commenting tool

- > once, enables its function.
- > once again, disables its function.

The following table lists the commenting options.

Tool	Icon	Explanation
Text marker		Highlight text with a freehand marker. Available settings are color, thickness, and opacity. Note: The marker stays active while sliding through the pages. Brainmark watermarks are not affected.
Fineliner		Add your freehand comments or drawings. Available settings are color, thickness, and opacity. Note: The fineliner stays active while sliding through the pages. Brainmark watermarks are not affected.
Text box		Add a comment. Available settings are font size and font color.
Sticky note		Add a sticky note comment.
Rubber		Delete highlights made with the freehand marker, freehand comments or drawings. Note: The rubber stays active while sliding through the pages. Brainmark watermarks are not affected.

The system default value for saving comments automatically is set to 2 seconds after the last contact with the touch screen. While you work on a document, new comments and changes are saved locally. Thus, changes are always saved, even if the Internet connection is interrupted. The comments are saved to the server once the document is closed by tapping the **Done** button.

1.5 FREQUENTLY ASKED QUESTIONS (FAQS)

Which operating systems are supported?

Microsoft Windows 10 (x64) and Windows 11 (x64).

Which Dataroom versions are supported?

Dataroom installed on a server with Brainloop Secure Dataroom version 8.46 or newer.

Where and how can I get the app?

In the online Microsoft Store using a Microsoft account.

How can I access a Dataroom?

The Dataroom Manager invites you to the Dataroom concerned.

Is it possible to solely use the client or do I have to be active in Brainloop Secure Dataroom?

You must be a member of at least one Dataroom.

How often is data synchronized?

The system default value for the automatic synchronization is set to every hour.

Note: If automatic synchronization is deactivated, your Datarooms are no longer synchronized regularly. You can trigger a *manual* synchronization anytime by tapping the **Sync** icon and synchronize individual Datarooms in the list of Datarooms. This synchronization checks and synchronizes all updates since the last synchronization.

You can set the default synchronization behavior of your Datarooms under **Settings > Servers and Datarooms > Automatic Synchronization**.

- > **Automatic synchronization = ON:** This is the installation default. With this setting activated, all Datarooms are automatically synchronized every hour. Next to the synchronization icon in the top navigation, the timestamp of the last synchronization is displayed.
- > **Automatic synchronization = OFF:** If automatic synchronization is deactivated, your Datarooms are no longer synchronized regularly. You can manually trigger a global synchronization anytime by tapping the Sync icon or synchronize individual Datarooms in the Datarooms screen.

You can initiate a full synchronization at any time under **Settings > Servers and Datarooms > Full synchronization**.

What is a Brainmark document?

The Brainmark version of a document or a document collection is a frozen version with a unique ID (Brainmark ID) for additional document protection. The Brainmark version can also contain a dynamically generated watermark, e.g. the username of the Dataroom member who downloaded it.

What is a Boardbook?

A Boardbook is a type of document collection.

Where do I find contact data and online help?

In the **Settings** menu or on the login page, tap on **Support** to access the setup and user guides, Customer Service Portal, email support, an option to send a log file, as well as phone numbers to reach the Brainloop in-country support staff.

2 Get started

The main steps to get started are as follows:

1. Activate the device's screen lock
2. Download and install the app from the Microsoft Store
3. Define an access code
4. Register with Brainloop Secure Dataroom

2.1 ACTIVATE THE DEVICE'S SCREEN LOCK

To increase the protection level of your data, we recommend setting the screen lock on your device. This adds another layer of security on your device and also protects documents from other apps. We recommend that you use a complex, alphanumeric password. For instructions on how to set a screen lock, please refer to the documentation for your device.

2.2 DOWNLOAD AND INSTALL THE APP FROM THE MICROSOFT STORE

The Brainloop Secure Client app can be downloaded and installed free of charge from the Microsoft Store. Type Brainloop into the search field to search for this app and install it according to the instructions displayed on the screen.

For details on the **prerequisites** for using the Secure Client app, please refer to the Setup Guide for Dataroom Center Managers and Dataroom Managers.

2.3 DEFINE AN ACCESS CODE

The Secure Client app is secured by an access code that must be entered each time the dialog is opened. When you open the app for the first time, you are prompted to define your personal simple or complex access code. To secure your offline documents even more effectively, we recommend that you define a complex access code.

Note: If a Dataroom security policy is applied to the app, you may need to log in to the app using a complex access code. Furthermore, each Dataroom has a separate security policy for access codes. If you synchronize with several Datarooms, the Dataroom with the strongest security policy determines the access code settings required to log in to Brainloop Secure Client. If you have defined a simple access code in the app, you have to change this simple code to a complex one. A corresponding message is displayed. Confirm this message with **OK** and change your access code to a complex one, see Change your access code on page 50.

To define a simple access code:

1. Tap the **Secure Client** icon on your device.
 2. In the **Enter a new access code** field, tap an access code of your choice using the numeric keypad. This code should be at least four digits long.
 3. In the **Confirm a new access code** field, confirm the new access code.
 4. Tap the right arrow button.
- Once you have defined an access code, you are directed to the page where you must add one or more Dataroom servers, see Register and log into a Dataroom (https://help.brainloop.com/bdrs/help/bdrs84x/#/home/intro_beforeyoubegin.htm/10/11).

To define a complex access code:

1. Tap the **Secure Client** icon on your device.
 2. On the page then displayed, tap the **Switch to complex access code** link.
 3. In the **Enter a new access code** field, tap an alphanumeric access code of your choice using the keypad.
 4. Confirm your access code in the **Confirm a new access code** field.
 5. Tap the right arrow button.
- Once you have defined an access code, you are directed to the page where you must add one or more Dataroom servers, see Register and log into a Dataroom (https://help.brainloop.com/bdrs/help/bdrs84x/#/home/intro_beforeyoubegin.htm/10/11).

2.4 REGISTER AND LOG INTO A DATAROOM IN BRAINLOOP SECURE DATAROOM

Before you can enter a Dataroom for the first time in the Brainloop Secure Client app, you must be invited by a Dataroom member and then register with Brainloop Secure Dataroom. The invitation to your Dataroom is generally

sent to you by email. The email includes an explanation of the registration process and a link to the registration page.

To register and log into your Dataroom in Brainloop Secure Dataroom:

1. Click on the link in the email or open the URL provided in a browser.

The registration page opens in the browser.

Tip: You can also open the login page of the Dataroom for the initial registration and start the process from there by clicking the **Register** link. In this case, you also need to provide your email address to authenticate yourself.

2. If you do not start the registration via the link in your invitation email, you will receive a PIN by email or SMS, depending on how you were invited. Enter the PIN and click **Next**.
3. Specify this information:

- **First name** and **last name**.
- Enter a **password** and repeat it. The password length and its strength depend on your Dataroom configuration settings.
- Choose your preferred language.

The application automatically detects and uses the date and time format from your browser settings. You can change the settings later in your profile.

4. Next, read and confirm the **Terms of Use** and click **Continue**. The registration process is finished.
5. The next step depends on the following:
 - If you have only been invited to join **one** Dataroom and this Dataroom does not require any further authentication, you will be taken directly into this Dataroom.
 - If you have been invited to join **several** Datarooms, you will be taken to the **Dataroom Selector**, which lists all the Datarooms that you have been invited to join. Click a Dataroom to access it.

Tip: Save the Dataroom address in the Favorites or Bookmarks of your browser so that you can call it up quickly.

6. Specify this information:
 - You also have to register a mobile phone number in your profile, if the Dataroom is protected with an SMS PIN authentication and your mobile number was not already entered by the Dataroom Manager.
 - If desired, you may set a security question, which is used to verify your identity in case you lose your mobile phone.

After you have registered, an SMS containing a PIN is sent to your mobile phone.

7. Enter the PIN to access the Dataroom.
8. If your Dataroom Manager has activated special terms of use for this Dataroom, read them carefully. If the conditions are in a linked document, click on the link to open the document and read it before you continue.
9. Finally, select **I have read and agree to the Terms of Use**.

10. Click **Next** to complete the process.

2.5 ADD DATAROOM SERVERS AND SELECT DATAROOMS

Once you have entered your access code and registered with Brainloop Secure Dataroom, you need to add the servers on which your Datarooms are installed. You can add several servers to access as many of your Datarooms installed on these servers as you like.

To add Dataroom servers and select Datarooms:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Servers and Datarooms > Add Dataroom server**.
3. On the page then displayed, specify your Dataroom server. To do so, select one of these options
 - Tap the search icon  to the right of the topmost field. From the **Add Dataroom server** page, select your Dataroom server from the list, e.g. <https://my.brainloop.net>.
 - If your server is not in the list, tap **Cancel**. On the page then displayed, tap into the topmost field. A keypad is displayed in the lower part of the page. Type the corresponding URL into the field.
4. Next, tap the **Enter your email address** field and type the email address you used (you have given the Dataroom Manager for use with the Dataroom) during your first registration with the Dataroom server.
5. Type the password that you defined during your first registration with the Dataroom server into the corresponding field.
6. Tap **Login**.

The Internet connection to the selected server is now established and all your Datarooms installed on this server are loaded.
7. The next step depends on the number of your available Datarooms:
 - Up to 12 Datarooms: all Datarooms in the list provided are preselected by default for synchronization.
 - Deselect any Datarooms that you do not want to synchronize.
 - More than 12 Datarooms: none of the Datarooms are preselected.
 - Select the Datarooms that you would like to synchronize from the list provided.

Tip: You can use the + (plus) and - (minus) icons to select or deselect all Datarooms.
8. Tap **OK** to synchronize the selected Datarooms.
9. If the selected Datarooms are additionally protected by PIN authentication, enter the PIN you receive by SMS or email and tap **OK**.

The selected Datarooms are synchronized.

2.6 CONNECT TO DATAROOM SERVERS PROTECTED WITH SAML AUTHENTICATION

If your Dataroom server requires authentication via a SAML server, the following steps are necessary for authenticating with Brainloop Secure Dataroom.

Note: These steps require that you are registered and have already logged in once to your Dataroom server in your web browser.

To connect to Dataroom servers protected by SAML authentication:

1. Configure your Dataroom server as described, see Add Dataroom servers and select Datarooms on page 19 (steps 1 and 2).
2. Enter your email address, but do not enter a password.
3. Tap **Login**.
You are redirected to a SAML authentication window within the app.
4. Enter your SAML username (for example saml-server.xyz\firstname.lastname) and your password (you should have received both from your system administrator) and tap **OK**.
5. Once your authentication has succeeded, select your Datarooms as described in the previous chapter.

3 How to ...

3.1 ACCESS DATAROOMS

1. Tap the datarooms icon  to view all the Datarooms that you have added to your device.
In addition to the Dataroom name and the required access security on the left, the last successful synchronization time is displayed on the right.
Tip: If you want to manage your Datarooms, you can tap **Manage Dataroom server** to the right of the platform name shown above the Datarooms list (example: **MY.BRAINLOP.NET**).
2. Tap the name of a Dataroom to open it.
3. If your Dataroom is protected by secondary authentication, use one of the following methods:
 - **SMS PIN authentication:** Enter the PIN you received by SMS or by email into the corresponding field.
 - **Security code authentication:** Open your authenticator app, enter the 6-digit security code into the corresponding field, and tap **OK**. Please note that the six-digit security code changes every 30 seconds.
4. Tap **OK**.
The root folder of the selected Dataroom and its contents are displayed.

3.2 FILTER DOCUMENTS

You can view all documents of your Dataroom as an entity or according to last activities. Use the filter buttons to filter the documents.

The following filter buttons are available:

- **Boardbooks** to view all documents (document collections) of your Dataroom.
- **Favorites** to view all documents you have marked as favorites.
- **Recently viewed** to view all documents you have recently viewed.
- **Recently changed** to view all documents that have recently changed.

Except for the **Boardbook** filter, the documents are automatically sorted by time intervals.

3.3 SEARCH FOR DOCUMENTS AND DOCUMENT CONTENT

In the **Documents** screen and in the **Dataroom** screen, you can search for documents by their name or part of their name. Further, you can use the full-text search for document content available in connected Datarooms.

Note: The full-text search is only available in online mode and for documents. It is not available for document collections.

To search for a document:

1. Tap the search icon  in the top navigation bar.
2. Tap the filter icon  and select the desired search filter from the drop-down list:
 - **All**: Displays a list of all documents with names that contain the letters entered (default option).
 - **Changed within the last 60 (30, 15) days**: Displays a list of documents that were changed within the selected number of days.
 - **Commented (downloaded only)**: Lists only those documents containing comments or markups, which were downloaded to your device and which either remain on the device (solid icon) or have subsequently been deleted from the device (grayed out icon).
 - **Recently viewed**: Displays a list of all recently opened documents.
3. Tap in the search field and, using the keyboard displayed, enter the file name of the document, or part of its file name.
4. Tap the search icon .
The results list contains all documents that match the search criteria from all Datarooms that have been synchronized with the device. The name of the Dataroom where the documents were found is shown directly above the name of each document.
5. Tap a document to open it.

To search for document content:

1. Tap the search icon  in the left corner of the top navigation bar.
2. Tap the filter icon  and select **Full-text search** from the drop-down list.
3. Tap in the search field and, using the keyboard displayed, enter the search term.
4. Tap the search icon .

The results list contains all documents that contain the search term from all Datarooms that have been synchronized with the device. The name of the Dataroom where the documents were found is shown directly above the name of each document.

5. Tap a document to open it.

3.4 SYNCHRONIZE ALL DATAROOMS

When first connecting to your Dataroom, all Dataroom settings, events, votes, document versions, comments and markups are synchronized and verified. Therefore, the first synchronization may take some time, depending on the number of Datarooms you have added to the device as well as on the amount and size of data included. During the initial full synchronization, all policies that have been defined at Dataroom Center level for Brainloop Secure Client and at Dataroom level for the Dataroom content are applied.

Tip: You can initiate a full synchronization at any time under **Settings > Servers and Datarooms > Full synchronization**.

Note: You can configure the download scope and behavior under **Settings > Downloads**. For instance, it is possible to download only the metadata of a Dataroom and to download documents upon opening them.

Next to the synchronization icon, the timestamp of the last synchronization is displayed.

To synchronize all Datarooms:

1. Tap the sync icon  in the top navigation bar to access the synchronization progress dialog with the time and date of the last global synchronization and the Synchronize button.
2. Tap the **Synchronize** button.

The spinner icon starts spinning while all Dataroom settings, events, votes, document versions and comments are synchronized and verified. All changes and updates that have been made to documents are flagged in the Document's view of the user's device. The bubble icon, for example, indicates that comments have been added to a document.

The synchronization progress dialog shows the name of the Dataroom that is currently being synchronized, the number of Datarooms that have been synchronized, and the number still pending. From the synchronization progress dialog, you can stop a running synchronization manually by tapping the **Stop Synchronization** option.

3. Select **Close** when the synchronization is finished.

Note: This synchronization process is a differential synchronization that synchronizes and verifies all updates since the last synchronization including all Dataroom settings, events, votes, document versions, comments and markups. The differential synchronization runs in the background and does not interrupt the user's work.

If a synchronization error occurs because of a Dataroom security policy configuration, you get a corresponding message enabling you to request assistance from a Dataroom Administrator.

3.5 AUTOMATIC AND MANUAL SYNCHRONIZATION

You can set the default synchronization behavior of your Datarooms under **Settings > Servers and Datarooms > Automatic Synchronization**.

- > **Automatic synchronization** = ON: This is the installation default. With this setting activated, all Datarooms are automatically synchronized every hour. Next to the synchronization icon in the top navigation, the timestamp of the last synchronization is displayed.
- > **Automatic synchronization** = OFF: If automatic synchronization is deactivated, your Datarooms are no longer synchronized regularly. You can manually trigger a global synchronization anytime by tapping the Sync icon or synchronize individual Datarooms in the Datarooms screen.

In combination with the possibility to manually synchronize selected Datarooms you can significantly speed up the display process, for example, if you want to synchronize a specific Dataroom only.

3.6 SYNCHRONIZE DATAROOMS MANUALLY

You can synchronize individual Datarooms or all Datarooms manually at anytime. This is especially relevant, if the automatic synchronization of Datarooms is turned off.

To synchronize individual Datarooms:

1. In the list of Datarooms, tap the required Dataroom row and swipe to the left.
2. Click the **Sync** button that is displayed next to the "Last sync: <time>" column.

To synchronize all Datarooms:

1. Tap the sync icon  in the top navigation bar to access the synchronization progress dialog with the time and date of the last global synchronization and the **Synchronize** button.
2. Tap the **Synchronize** button.

3.7 STOP SYNCHRONIZATION

From the synchronization progress dialog, you can stop a running synchronization manually at any time. The **Stop Synchronization** option is available while a synchronization is running.

To stop a running synchronization:

1. Tap the sync icon  in the top navigation bar to access the synchronization progress dialog with the time and date of the last global synchronization and the **Synchronize** button.
2. Tap the **Stop Synchronization** button.

Note: If you stop the synchronization and there is a download queue, the app will start downloading documents.

3.8 CREATE NEW DATAROOM FOLDERS

You can create new Dataroom folders directly from within the Brainloop Secure Client app.

1. Tap the Datarooms icon .
2. Select the Dataroom concerned by tapping it.
The folders view is displayed.
Note: You open a folder with one tap on it.
3. Navigate to the folder concerned.
4. Tap the create folder icon .
5. Enter the folder name into the **Folder name** field and tap **OK**.

Note: It is not possible to delete a folder from within the Brainloop Secure Client app.

3.9 CHANGE THE FOLDERS VIEW

Folders and folder contents are sorted alphabetically in ascending order by default. You can change the folders view.

To change the sorting order, select one of these options:

- **File name** if you want to have folders or documents sorted by name.
- **Date** if you want to have the folders or documents sorted by the modified date.

Note: One tap changes the order from ascending to descending and vice versa.

3.10 DOWNLOAD DOCUMENTS

As soon as a document or its metadata is available on the mobile device, its icon is displayed. If only the metadata of a document has been synchronized, the icon of this document is displayed with 30% opacity.

To download a single document:

1. Tap the document to download it.

If the necessary permissions and Dataroom configuration settings are available, this downloads the Brainmark version of this document. Otherwise, the original document or nothing is downloaded to the device. A spinner icon indicates the download progress for the document.

2. Tap the spinner icon for more detailed information on the state of the download process.

A progress dialog is displayed showing the number of documents that are currently processed for download. The dialog also provides a **Synchronize** button.

3. Tap the **Synchronize** button to start a synchronization.

Note: Starting a synchronization automatically pauses the download process.

To download multiple documents:

1. Select a folder.

2. Tap the download document icon  and select one of these options:

- **Download all content of this folder** to download all documents contained in this folder excluding the documents contained in its subfolders.
- **Download all content of this folder including subfolders** to download all documents including the documents contained in its subfolders.

All documents from this folder and, if selected, from its subfolders are downloaded to your device. During the download, you have these options:

- Tap the clean icon  in the top navigation bar to delete the download.
- Tap the pause icon  in the top navigation bar to stop the download. You can then proceed by tapping the resume icon .
- Tap the spinner icon for more detailed information on the state of the download process.
A progress dialog is displayed showing the number of documents that are currently processed for download. The dialog also provides a **Synchronize** button.
- Tap the **Synchronize** button to start a synchronization.

Note: Starting a synchronization automatically pauses the download process.

3.11 DOWNLOAD ALL VERSIONS

1. Tap and hold a document.
The options for this document are displayed.
2. Select **Show all versions**.
All versions of this document are displayed.
3. Tap the download document icon .

3.12 DOWNLOAD ORIGINALS

Note: The **Download original document** option is only offered if permitted by the Dataroom configuration and security settings.

To download the original of a document you first need to delete the local copy of the document.

1. Tap and hold the document of which you want to download the original.
The options for this document are displayed.
2. Select **Delete from device** and confirm that you want to delete the local document.
The document is indicated as not downloaded with an opacity of 30%.
3. Again tap and hold the document of which you want to download the original.
The options for this document are displayed.
4. Select **Download original document**.
The original document of the current version is downloaded to your device.

3.13 UPLOAD DOCUMENTS

You can upload files from other apps into your Datarooms directly from within the Brainloop Secure Client app. Please note that this option also depends on your permissions.

1. In the folders view, tap the folder where you want to upload the document.
2. Tap the upload icon .
3. Navigate to the location of the document.
4. If the selected document already exists in the folder, confirm that you want to upload a new version of the document, or cancel the upload.

3.14 WORK WITH BRAINMARK DOCUMENTS

Tap a Brainmark document  to open it in the PDF Viewer.

3.14.1 SET BOOKMARKS IN BRAINMARK DOCUMENTS

You can bookmark the pages in Brainmark and PDF documents opened in the PDF Viewer and then quickly navigate to these pages.

1. In the folders view, tap a Brainmark document.

The Brainmark document is opened in the PDF Viewer.

2. In the top-right corner of a document's page, tap the bookmark icon .

The selected page is bookmarked and the icon changes to a colored bookmark .

Tip: You can also filter by bookmarked pages. For details, see Filter a Brainmark document by bookmarked pages on page 30.

3.14.2 NAVIGATE AND SEARCH BRAINMARK DOCUMENTS

The PDF Viewer offers top and sidebar navigation bars containing the following options:

- > Display/hide the sidebar navigation with table of contents, comments and search option
- > Change personal page view and layout settings for the currently open and all subsequent PDF documents
- > Switch between thumbnail and bookmark navigation

3.14.2.1 DISPLAY AND HIDE THE SIDEBAR IN THE PDF VIEWER

Having opened a Brainmark document in the PDF Viewer, you can display or hide the sidebar. Your setting is stored and used if you open the PDF Viewer the next time.

Note: When you first open a Brainmark document after a new installation of the Brainloop Secure Client, the sidebar display in the PDF Viewer depends on the properties of the PDF document. If the PDF document contains a table of contents, the Contents pane is displayed; if not the Search pane is displayed. This also applies if you have activated the sidebar display the last time you have used the PDF Viewer.

To display or hide the sidebar navigation:

1. In the folders view, tap a Brainmark document.
The Brainmark document is opened in the PDF Viewer.
2. Tap the navigation icon  in the top-left corner of the PDF Viewer to display the sidebar.
Note: The contents icon, the comments icon and the search icon are displayed at the bottom of the sidebar.
3. Tap the navigation icon  again to hide the sidebar.

3.14.2.2 SET THE DEFAULT PAGE LAYOUT AND ORIENTATION OF DOCUMENTS IN THE PDF VIEWER

You change the default page layout and orientation settings for all Brainmark documents opened in the PDF Viewer.

To change the page layout and orientation of documents:

1. Tap the show options icon  in the top-right corner of the PDF Viewer.
2. In the upper area, select one of these options by tapping it:
 - **Single page:** Display one page at a time. Scroll up and down or vice versa, from one page to the next or previous one.
 - **Continuous:** Scroll up and down continuously through one page after the other.
3. In the lower area, select one of these options by tapping it:
 - **Fit page:** Resize the page to fit entirely the viewing area.
 - **Fit width:** Resize the page to fit the width of the viewing area.
 - **Fit height:** Resize the page to fit the height of the viewing area.

3.14.2.3 NAVIGATE BRAINMARK DOCUMENTS USING THUMBNAILS

You can navigate a Brainmark document by using the thumbnails shown in the top navigation bar.

1. In the folders view, tap a Brainmark document.
The Brainmark document opens in the PDF Viewer.
2. Tap the thumbnail view icon  in the top-right corner of the PDF Viewer to open the Thumbnail view that shows all thumbnails or bookmarks of the document on one page.
3. Tap a thumbnail to navigate to the corresponding page.

3.14.2.4 FILTER BRAINMARK DOCUMENTS BY BOOKMARKED PAGES

1. In the folders view, tap a Brainmark document.
The Brainmark document is opened in the PDF Viewer.
2. Tap the thumbnail view icon  in the top-right corner of the PDF Viewer to open the Thumbnail view that shows all thumbnails or bookmarks of the document on one page.
3. Tap **Only bookmarks** or move the slider to the right.
The bookmarked pages are displayed.
4. Tap a bookmarked page to navigate to it.
5. Tap **Only bookmarks** once again or move the slider to the left for viewing the Thumbnail view again.

3.14.2.5 SEARCH BRAINMARK DOCUMENTS FOR TEXT

In the sidebar, you will find a full-text search feature to search a document for any keyword entered.

1. In the folders view, tap a Brainmark document.
The Brainmark document opens in the PDF Viewer.
2. Tap the navigation icon  in the top-left corner of the PDF Viewer to open the sidebar.
3. Tap the search icon  in the bottom navigation bar.
Note: If you open a document that does not include a table of contents the sidebar contains only the search icon.
The search field is displayed.
4. Tap into the search field.
The keyboard is displayed.
5. Enter your search term and tap the keyboard's **Search** key or the search icon next to the search field.
6. In the list of results, tap an item to navigate to the corresponding page.
7. Tap the navigation icon  in the top-left corner of the PDF Viewer to close the sidebar.

3.14.2.6 SEARCH BRAINMARK DOCUMENTS FOR COMMENTS AND MARKUPS

In the sidebar, you can also search for comments and markups added to Brainmark documents provided the document contains any.

1. In the folders view, tap a Brainmark document.
The Brainmark document opens in the PDF Viewer.

2. If the sidebar is not displayed, tap the navigation icon  in the top-left corner of the PDF Viewer.
3. Tap the **Comments** icon in the bottom navigation bar.

All comments and markups contained in the document are displayed below the search field. Comments and markups also contain the names of the users who added them. The type of a comment, i.e. a note, text, freehand comment, or highlighted text, is clearly indicated in the list of results.
4. Tap a comment to navigate to the corresponding page.
5. Enter the name of a reviewer into the search field and tap the keyboard's **Search** key if you only want to have this reviewer's comments and markups displayed.

3.14.2.7 NAVIGATE BRAINMARK DOCUMENTS USING THE TABLE OF CONTENTS

The sidebar in the PDF Viewer contains the contents icon  that allows you to navigate quickly to a section in the document. Please note that this option is only available if the opened Brainmark or PDF document contains a table of contents.

1. In the folders view, tap a Brainmark document.

The Brainmark document is opened in the PDF Viewer.
2. If the sidebar is not displayed, tap the navigation icon  in the top-left corner of the PDF Viewer.
3. Tap the contents icon  in the bottom navigation bar to display the document's table of contents.
4. Tap a chapter or section title to navigate to the corresponding page.

3.14.3 ADD PRIVATE COMMENTS TO BRAINMARK DOCUMENTS

With the Brainloop Secure Client app, you can add comments to Brainmark documents downloaded to your device, which are then uploaded to the Dataroom server (private synchronized comments).

While working on a document, your new comments and changes are saved locally two seconds after the last contact with the touch screen. This ensures that changes are always saved, even if the internet connection is interrupted. All comments and markups are synchronized to the server when you tap the back button  to close the document.

You can also add private comments to a Brainmark document in offline mode. Even if you interrupt work for a longer period of time, your comments and markups are saved locally. The next time your device is connected to the internet, a synchronization is started and the commented document is uploaded to the Dataroom server. Changes made to a commented document on the Dataroom server are also synchronized with your device.

Note: You may only comment on Brainmark documents if certain settings have been made in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

Important note: You cannot comment on a Brainmark document that is already deep-frozen, as this type of document cannot be changed in any way, or if the review period has expired. In these cases, the commenting and markup tools are not available in the PDF Viewer.

Tip: To share commented and uncommented Brainmark documents with other Dataroom members for reviews see Share Brainmark documents for review on page 36.

To add private comments to a Brainmark document:

1. In the folders view, tap a Brainmark document.

The Brainmark document is opened in the PDF Viewer. A toolbar with commenting and markup tools is displayed to the right.

2. Navigate to the page to which you want to add your comments.

Note: The toolbar is always visible, except in the Thumbnail view, if commenting is allowed.

3. Add your comments using the following tools:

-  Highlight text

Tap this icon, then swipe across the text you want to highlight.

To change the comment settings, see Change comment settings on page 33. To delete a highlight, see Delete private comments from Brainmark documents on page 34.

-  Add freehand comments or drawings

Tap this icon, then add your freehand comments or drawings.

To change the comment settings, see Change comment settings on page 33. To delete a comment or drawing, see Delete private comments from Brainmark documents on page 34.

-  Add a comment

Tap this icon, tap the desired position for your comment and then enter your text at the cursor position using the onscreen keyboard. The editing mode remains active until you tap the document or hide the onscreen keyboard by tapping the Keyboard key.

To change the comment, tap the text, then tap **Edit text**. Edit the text, then leave the editing mode.

To change the comment settings, see Change comment settings on page 33. To delete a comment, see Delete private comments from Brainmark documents on page 34.

-  Add a sticky note comment

Tap this icon, then enter your text using the onscreen keyboard. The editing mode remains active until you tap the document.

To change the comment, tap the text. In the text field, edit the text and then tap **Save**.

To change the comment settings, see Change comment settings on page 33. To delete a comment, see Delete private comments from Brainmark documents on page 34.

3.14.3.1 CHANGE COMMENT SETTINGS

The following table lists the possible settings of the commenting tools. The default settings are displayed in bold.

Tool	Color	Thickness / Font size	Opacity
Text marker	Blue / Yellow / Green / White / Red / Black	5 / 10 / 15 / 20 pt	continuously adjustable from 0 to 100% (50%)
Fineliner	Blue / Yellow / Green / White / Red / Black	2 / 4 / 6 / 8 pt	continuously adjustable from 0 to 100% (100%)
Text box	Blue / Yellow / Green / White / Red / Black	8 / 12 / 16 / 24 / 30 / 36 pt	-
Sticky note	Black	-	-

When you change the settings of a commenting tool, the changes are kept. Once the comment is made with certain settings, the settings of this comment cannot be changed anymore.

To change the settings of the text marker, the fineliner and the text box:

1. Tap the comment tool icon for a longer time.
2. To change the color, tap the color desired.
3. To change the thickness, tap the value desired.
4. To change the opacity, move the slider to the value desired.
5. Tap the document to save the settings.
6. Tap **Reset** to reset the settings of the commenting tool to its default values.

3.14.3.2 USE STICKY NOTE OPTIONS

Within sticky note comments, you can use the following options.

- > **Cut / Copy & Paste** single words
Tap a word, tap **Cut** to cut the word or **Copy** to copy it. Tap where you want the word to be inserted into and tap **Paste**.
- > **Cut / Copy & Paste** the complete note content
Tap a word, tap **Select all**, tap **Cut** to cut the complete note content or **Copy** to copy it. Tap where you want the complete note content to be inserted into and tap **Paste**.
- > Choose a word from the dictionary
Tap a word underlined red, and, from the suggestions, select the word with which you want to replace the first word.
- > Add a word to the dictionary
Tap a word underlined red and then tap **Add to dictionary**.
- > **Ignore** the spelling of a word
Tap a word underlined red and then tap **Ignore**.

3.14.3.3 ADD PRIVATE COMMENTS TO BRAINMARK DOCUMENTS AFTER THE REVIEW PERIOD

After the defined review period has expired, the Comment toolbar is no longer available and you have no possibility of commenting anymore. Before the review is opened, a message is displayed informing you that the review period has expired. However, you can still open the review.

3.14.4 DELETE PRIVATE COMMENTS FROM BRAINMARK DOCUMENTS

You can delete all text comments and markups you have added to a Brainmark document. You cannot delete comments and markups made by others.

You have various options for deleting comments and markups:

- > Delete comments or markups directly from the sidebar
- > Delete comments or markups within the document
- > Delete comments made with text marker or fineliner partly or completely using the rubber

To delete private comments directly from the sidebar:

1. In the folders view, tap a Brainmark document.
The Brainmark document is opened in the PDF Viewer.
2. If the sidebar is not displayed, tap the navigation icon  in the top-left corner of the PDF Viewer.

Tap the Comments icon in the bottom navigation bar.

All comments and markups contained in the document are displayed below the search field.

1. Navigate to the comment you want to delete.
2. On the comment concerned, swipe to the left.
The **Delete** option is displayed to the right of the comment.
3. Tap **Delete** to delete the comment.

To delete private comments within the Brainmark document:

1. In the folders view, tap a Brainmark document.
The Brainmark document is opened in the PDF Viewer.
2. Navigate to the page from which you want to delete your comments.
3. Tap the corresponding comment or markup.
4. Tap **Delete**.
The selected comment or markup is deleted.

To delete comments made with text marker or fineliner partially or completely:

1. In the folders view, tap a Brainmark document.
The Brainmark document is opened in the PDF Viewer.
2. Navigate to the page from which you want to delete your comments.
3. Tap the rubber icon  in the comment toolbar.
4. Erase the comments or parts of the comments by rubbing them out.

Note: Only the specific part directly touched on the screen is deleted. If you do not rub the complete comment out, you erase only a part of it. Thus, comments can visually fall into several parts. However, the parts of such a comment are still treated as a whole. That means that you can delete the remaining parts of it in one step using the **Delete** option.

3.14.5 SHARE BRAINMARK DOCUMENTS FOR REVIEW

You can share a Brainmark document for which you have added private comments from within the app with other Dataroom members. Additionally, you can start a completely new, shared review, that is, you can share a yet uncommented document and ask the reviewers to add their comments, or you can also reshare an already commented document with others. This **Share review** option corresponds to the **Review** option in Brainloop Secure Dataroom.

Note: You may only comment on Brainmark documents if certain settings have been made in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

You can share a Brainmark document

- > that contains your private comments with other Dataroom members. As soon as you share this document with others, your comments are no longer private and are thus visible to the reviewers.
- > that does not contain any comments yet with other Dataroom members. The reviewers may then add their comments.
- > that already contains comments from the reviewers, for example to invite further reviewers.

Note: Please note that you may only comment on Brainmark documents if certain settings have been made in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

To share Brainmark documents for review:

1. Tap and hold a document.
The options for this document are displayed.
2. Select **Share review**.
The **Share review** page is displayed.
3. Specify this information:
 - **Reviewers:** Tap + (plus) and select individual reviewers and entire user groups from the list. Tap **OK**.
 - **Review type:** Tap the field and select
 - the **Share my private review** option if you want to share your review with others.
 - the **Start a new shared review** option if you want to start a shared review.
 - the **Shared review of [name of document]** option if you want to reshare a review.
 - **Review until:** Select the date and time when the review expires. All comments entered after this date are not visible to the other reviewers, because they are no longer synchronized with the server.
 - **Message:** Enter a message text (maximum 3,000 characters) or use the default one.

4. Tap **Share**.

The link to the shared document is sent to the selected recipients and to yourself by email.

Note: Once new comments and markups have been added to a document, this is indicated by the bubble icon in the documents view. Also, if another user has added a new comment or markup to a shared review, this is indicated by a flag in the Documents view as well as in the folders and files list of the Datarooms view upon synchronization.

3.14.6 JOIN A DOCUMENT REVIEW

When you are invited to join a review of a Brainmark document on your device, you receive a corresponding email notification. In a shared document review, you can open the commented document on your device either by clicking on the link in your email notification, or by navigating to the respective folder in the app's folders view.

Note: You may only comment on Brainmark documents if certain settings have been made in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

1. Open the email that contains the invitation to join a review in your device's mailbox.
2. Tap the document link.

You are directed to a landing page where you can choose your preferred method for viewing the document.

3. Tap the link **Open in Brainloop Secure Client** to access your Datarooms directly from your mobile device.
4. Enter your access code.

The Brainmark document is opened in the PDF Viewer. The shared document review is selected by default.

5. Navigate to the page to which you want to add your comments.
6. Enter your sticky notes, free text or drawings, or highlight text, see Add private comments to a Brainmark document on page 31.
7. Close the document to save your comments.

The shared review of this Brainmark document is then synchronized with the server.

3.14.7 OPEN A SPECIFIC DOCUMENT REVIEW

In the PDF Viewer, you can display all reviews made to the Brainmark document, browse through the individual reviews in the list and open review details. The information includes the review type and version, the last modified and expiration dates as well as the commented by information.

To open a specific document review:

1. In the folders view, tap a Brainmark document.
The Brainmark document is opened in the PDF Viewer.
2. Tap the select a review icon  in the top-right corner of the PDF Viewer.
The **Select a review** page includes the following information:
 - The review details including
 - The review type: shared or private
 - The last modified and expiration dates.
 - The created by and modified by information.
 - All reviews downloaded to the device are displayed in black.
 - The currently open review is displayed in black marked with a green hook.
 - Other reviews available on the server are displayed in gray.
3. Tap a review highlighted in gray to download and open it in the PDF Viewer.

Note: You may only comment on Brainmark documents if certain settings have been made in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

3.15 OPEN AND READ ORIGINAL DOCUMENTS

A downloaded original document is marked with an icon that corresponds to the specific document format, for example  for a Word document or  for a PDF document.

Tap an original document to open it in the corresponding app.

Important note: You may only open a document in its original format if permitted by the Dataroom security policy and if you have an app that can open this file type installed on your device.

3.16 OPEN A SPECIFIC DOCUMENT VERSION

You can download and open different versions of a document.

1. In the folders view, tap and hold a document.
The options for this document are displayed.
2. Tap **Show all versions**.

All available versions of the documents are listed. The version number is displayed to the right of the document. All document versions already downloaded to the device are displayed in black. If only the metadata of a document version available on the server has been synchronized, the icon of this document is displayed with 30% opacity, and the document is downloaded after tapping on it.

3. Tap a document version highlighted in gray to download this version to the device or tap the download document icon  to download all versions of this document to your device at once.
4. Tap a document version highlighted in black to open this version in the PDF Viewer.

3.17 SEND DOCUMENTS SECURELY

Depending on the Dataroom settings, you can send documents securely to Dataroom members as well as to external users, i.e. to non-Dataroom members, from within the app. When a document is sent securely, a time-limited link to the item is sent to the recipients by email.

Important note: Documents in original format that are opened in the standard Windows viewer, i.e. outside the PDF Viewer, cannot be sent securely. The **Send securely** option is available for all documents downloaded to your device.

1. In the folders view, tap a Brainmark or PDF document.
The document is opened in the PDF Viewer.
2. Tap the share icon  and select **Send securely**.
You can also right-click the document in the folders view and then select the option **Send securely**.
The **Send securely** page is displayed.
3. Specify this information:
 - **Security level:** Select which recipients may receive the document and which document format is used. The following security levels are available depending on the Dataroom settings.
 - **Maximum (Dataroom members):** The document may only be sent to Dataroom members. Before downloading the document, recipients must authenticate themselves in accordance with the Dataroom settings.
 - **High (Externals with one-time PIN via email):** Recipients must authenticate themselves in the Dataroom with a one-time PIN, which they receive in a separate email. Every download is logged in the item history with the email address of the download recipient.
 - **Medium (Externals):** Recipients can download the document without having to authenticate with a one-time PIN. Every download is logged in the item history with the email address of the download recipient.

- **Low (Externals are anonymous):** Recipients can download the document without having to authenticate with a one-time PIN. Only the email address of the sender is logged in the item history. The email address of the download recipient is not logged.
 - **Recipients:** Enter or select the email addresses of the recipients. If you want to send the document to an external recipient, enter the email address into the field and tap the keyboard's **Enter** or **Return** key. If you want to send the document to a Dataroom member, enter the first letters of the username in the **Recipients** field and select the recipient from the results list. Alternatively, you can tap **+** (plus) and select individual recipients and entire user groups from the list. Tap **OK**.
 - **Send myself a copy:** Enable this option, if you want to receive a copy of the email.
 - **Message:** Enter a message text (maximum 3,000 characters).
4. Tap **Send**.
- The link to the document is sent to the selected recipients by email.

3.18 OPEN DOCUMENTS SECURELY

When you receive a secure document link by email and want to open the document on your device, you are directed to a landing page where you can choose your preferred method for viewing the document.

1. Open the email on your device.
2. Tap the document link.
3. On the landing page displayed, select one of these options.
 - **Open the Dataroom link in your default web browser:** Opens the document in the default web browser.
 - **Use the Brainloop Secure Client app to access Datarooms directly from the mobile device:** Opens the document in the app's PDF Viewer.

3.19 PRINT DOWNLOADED DOCUMENTS

You can print documents that were downloaded as Brainmarks as well as documents in original format via AirPrint.

1. In the folders view, tap a Brainmark or PDF document.

The document is opened in the PDF Viewer or in the standard Windows viewer.
2. Tap the share icon .
3. From the menu then displayed, select **Print**.

The **Print** page is displayed.
4. From the **Printer** selection list, select a printer.

5. Adapt the printer settings as desired and tap **Print**.

Note: You may only print Brainmark documents if no restrictions for printing Brainmark documents have been configured in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

3.20 OPEN DOWNLOADED DOCUMENTS IN OTHER APPS

You can open documents that were downloaded as Brainmarks as well as documents in original format in other apps.

1. In the folders view, tap a Brainmark or PDF document.

The document is opened in the PDF Viewer or in the standard Windows viewer.

2. Tap the share icon .

3. From the menu then displayed, select **Open in**.

Important note: You may only open a document in its original format if permitted by the Dataroom security policy and if you have an app that can open this file type installed on your device.

The **Open in** page is displayed.

4. Select the desired app.

Note: You may only open Brainmark documents in other apps if no corresponding restrictions have been configured in Brainloop Secure Dataroom. Please contact your Dataroom Manager for further information.

3.21 ADD DOCUMENTS TO AND REMOVE THEM FROM YOUR FAVORITES

To add a document to your Favorites in the folders view:

1. In the folders view, tap and hold a document.

The options for this document are displayed.

2. Tap **Add to favorites**.

The document is added to your Favorites.

To remove a document from your Favorites in the folders view:

1. In the folders view, tap and hold a document to show additional options.

2. Tap **Delete from favorites**.

The document is removed from your Favorites.

3.22 DELETE THE LOCAL COPY OF A DOCUMENT

To download an original document, you have to delete the local copy of this document first.

1. Tap and hold the document of which you want to download the original.

The options for this document are displayed.

2. Select **Delete from device** and confirm that you want to delete the local document.

The document is indicated as not downloaded with an opacity of 30%.

3.23 SYNCHRONIZE LOCAL DOCUMENTS

Synchronizing of local documents of each Dataroom configured on the device is normally done on a regular basis without the need of any user interaction. Documents are also synchronized each time the app is started. However, via a Dataroom security policy applied to the app, your Dataroom (Center) Manager can enforce synchronization of your Datarooms and Dataroom content to validate their authenticity on a regular basis.

Tip: You can also synchronize your local documents manually by tapping and swiping down the page. To synchronize the Dataroom content and changes, you can also tap the sync icon  in the top navigation bar.

3.24 MANAGE CALENDAR EVENTS

Dataroom calendar events for which you have been invited to participate can be accessed directly from within the Brainloop Secure Client app.

Tap the events icon  in the side navigation bar to open the list of calendar events.

The following table lists the icons used in the list of calendar events.

Icon	Where to find it	Explanation
	Shown to the left of every event	All calendar events are identified in the list with this icon.
	Shown to the right of the corresponding event	The calendar event is incomplete because your response is still pending.
	Shown to the right of the corresponding event	You have accepted the calendar event and will attend the event as scheduled.
	Shown to the right of the corresponding event	You have indicated that you are unsure whether you can attend the event as scheduled.
	Shown to the right of the corresponding event	You have declined the calendar event and will not participate in it.

3.24.1 FILTER AND SORT CALENDAR EVENTS

To filter calendar events:

In the top navigation bar, tap the filter icon  to select the desired display filter:

- > **Upcoming:** Display all events that have not yet taken place.
- > **Reply pending:** Display all events for which you have not yet confirmed or declined your participation.
- > **Past:** Display all past events.
- > **Declined:** Display all events that you have declined.
- > **All:** Display all events regardless of status.

To change the sorting order of events:

Above the list of calendar events on the left, select one of these options:

- **File name** if you want to have the calendar events sorted by name.
- **Date** if you want to have the calendar events sorted by date.

Note: One tap changes the order from ascending to descending and vice versa.

3.24.2 VIEW EVENT DETAILS

Tapping an individual event in the event list opens a detailed view that provides the information described below.

- > Event title
- > Reply: In the **Your reply** line, you can see more detailed information on your response:
 - **Incomplete:** Your response is still pending. In this case, you are also prompted to respond to the invitation by the **Reply** function on the right, see Reply to calendar events on page 44.
 - **Declined:** You have declined the calendar event and will not participate in it.
 - **Accepted:** You have accepted the calendar event and will attend the event as scheduled.
 - **Tentative:** You have indicated that you are unsure whether you can attend the event as scheduled.
- Note:** If you have organized the event, your reply is automatically indicated as accepted.
- > Status: The **Status** line indicates whether you have replied to the event invitation:
 - **Done:** You have replied to the event invitation.
 - **Active:** Your response is still pending.
- > Date of the event
- > Location (if entered by the event organizer)
- > Event organizer
- > Dataroom name
- > **Participants:** Shows a list of participants invited to the event. Depending on the selection made by the vote owner in Brainloop Secure Dataroom, the individual reply of each participant is shown next to the name of the respective participant.
- > **Attachments:** Shows a list of attachments included with the event invitation. Tap an attachment to download it to your mobile device for viewing or editing, see Navigate and search in a Brainmark document on page 28 and Add private comments to a Brainmark document on page 31.
- > **Description:** If the event organizer has entered a description of the event, this information is shown here.

3.24.3 REPLY TO CALENDAR EVENTS

You can reply to an event and modify your reply at any time prior to the event using the following options.

To reply to an event in the list of calendar events:

1. Select the response function using one of the following options:
 - Tap the **Response** function to the right of the event to which you want to respond.
 - Tap the event to which you want to respond.

2. Tap the pen icon  in the **Your reply** line in the details view of an individual event item.
3. Select the desired option from the **Reply** page:
 - **Accept:** Accept the event.
 - **Decline:** Decline the event.
 - **Tentative:** Announce that you are unsure whether you can attend the event as scheduled.

Your reply is indicated with the appropriate icon.

4. If you want to modify your reply, tap the corresponding icon    to the right of the event and select the appropriate option from the **Reply** page.

3.25 MANAGE VOTE ITEMS

Dataroom vote items in which you have been invited to participate can be accessed directly from within the Brainloop Secure Client app.

Tap the votes icon  in the side navigation bar to open the list of vote items.

The following table lists the icons used in the list of vote items.

Icon	Where to find it	Explanation
	Shown to the left of every vote	All vote items are identified in the list with this icon.
	Shown in the list of voters only	The participant has not yet cast a vote.
	Shown to the right of the corresponding vote	You have approved the proposal.
	Shown to the right of the corresponding vote	You have abstained.
	Shown to the right of the corresponding vote	You have rejected the proposal.
	Shown to the right of the corresponding vote	You have removed the proposal from voting for resubmitting at a later date.

You can change your decision if this has been set up accordingly by the Dataroom Administration. Otherwise, you can only cast your vote once.

3.25.1 FILTER VOTE ITEMS

In the top navigation bar, tap the filter icon  to select the desired display filter:

- > **In progress:** Display all vote items where voting is still in progress.
- > **Vote pending:** Display all vote items for which you have not yet cast your vote.
- > **Closed:** Display vote items for which voting has closed.
- > **All:** Display all vote items regardless of status.

The vote items shown are also automatically categorized as follows:

- > **DUE ON:** You must cast your vote before the deadline specified.
- > **NO END DATE:** You can cast your vote at any time.

3.25.2 VIEW VOTE ITEM DETAILS

Tapping an individual vote item in the vote item list opens a detailed view that provides the information described below.

- > Vote item title
- > Vote: In the **Your vote** line, you can see more detailed information on your vote:
 - **Not voted yet:** You have not yet cast your vote. In this case, you are also prompted to cast your vote by the **Vote** function on the right, see Cast your vote on page 47.
 - **Approved:** You have approved the proposal.
 - **Rejected:** You have rejected the proposal.
 - **Abstained:** You have withheld your vote.
 - **Postponed:** You have removed the proposal from voting.

Note: If you have organized the vote, the **Your vote** line is not displayed.
- > Status: The **Voting status** line indicates whether you have already cast your vote for the selected vote item:
 - **In progress:** Voting is in progress; votes are outstanding.
 - **Negative:** The vote result is negative.
 - **Positive:** The vote result is positive.
- > Due date (if specified by the vote item owner)
- > Vote organizer
- > Dataroom name

- > **Voting status:** This area shows a pie chart indicating the distribution of votes in percent for the selected vote item (**Not voted, Negatives, Positives, Neutral**) as well as an overview showing the total number of voters asked to cast their votes. The overview also shows a breakdown of **Approved, Rejected, Abstained, and Not voted**.
- > **Voters:** Shows a list of participants in the vote. Depending on the selection made by the vote owner in Brainloop Secure Dataroom, the individual votes cast by each vote participant are shown next to the respective participant's name.
- > **Attachments:** Shows a list of attachments included with the vote item. Tap an attachment to download it to your mobile device for viewing or editing. See also Navigate and search in a Brainmark document on page 28 and Add private comments to a Brainmark document on page 31.
- > **Description:** If the vote organizer has entered a description of the vote, this information is shown here.

3.25.3 CAST YOUR VOTE

You can cast your vote at any time prior to the voting deadline (if specified).

1. Select the vote function using one of the following options:
 - Tap the **Vote** function to the right of the vote item.
 - Tap the pen icon  in the **Your vote** line in the details view of an individual voting item.
2. Select the appropriate option from the **Vote** page.
 The available voting choices depend on the vote setup in Brainloop Secure Dataroom:
 - **Approve:** Approve the proposal.
 - **Reject:** Reject the proposal.
 - **Abstain:** Withheld your vote.
 - **Postpone:** Remove the proposal from voting and resubmit at a later date.
 - **Cancel:** Cast your vote not yet.
3. If applicable, add a comment to your vote and tap **Send**.

3.26 MANAGE SETTINGS

The app is installed with certain default settings, such as download settings for changed content, handling of local documents, and locking the app after a user's inactivity. You can customize these default settings in the **Settings** screen at any time. In this screen, you can also change your access code, add or remove Dataroom servers and Datarooms, and customize the app's layout, for example.

3.26.1 VIEW LIST OF DATAROOM SERVERS

From the **Server and Datarooms** settings, you can view the **List of Dataroom servers** to which your Brainloop Secure Client app is connected. Using this option, you can also view the date and time of your last login. It is recommendable to check this from time to time as a security measure.

To view the List of Dataroom servers:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Servers and Datarooms > List of Dataroom servers**.

3.26.2 ADD DATAROOM SERVERS

You can add several Dataroom servers and thus any number of Datarooms installed on different platforms for access through the Brainloop Secure Client app.

To add Dataroom servers:

1. Tap **Settings** in the bottom navigation bar.
2. Tap **Servers and Datarooms > Add Dataroom server**.
3. On the **Connect to Dataroom server** page, define your Dataroom server. See also Add Dataroom servers and select Datarooms on page 19.

3.26.3 REMOVE DATAROOM SERVERS

Important note: Removing a Dataroom server from the app also removes all the Datarooms installed on this server as well as all local documents.

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Servers and Datarooms > Remove Dataroom server**.
3. On the **Remove Dataroom server** page, select one or more Dataroom servers from the list and tap **OK**.
The selected Dataroom servers, their Datarooms and all local documents are removed without any security prompt.

3.26.4 ADD DATAROOMS

If you can access several Datarooms installed on a specific Dataroom server, you can add them in the app's settings.

To add Datarooms:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Servers and Datarooms > Add Dataroom**.
3. On the page then displayed, select or deselect one or more Datarooms from the list and tap **OK**.
The selected Datarooms are synchronized to your device.

3.26.5 REMOVE DATAROOMS

To keep your list of Datarooms always up to date, you can remove any Dataroom that you no longer need access to through the app.

To remove Datarooms:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Servers and Datarooms > Remove Dataroom**.
3. On the page then displayed, select one or more Datarooms from the list and tap **OK**.

Tip: You can use the + (plus) and - (minus) icons to select or deselect all Datarooms.

The selected Datarooms and all local documents are removed without any security prompt.

3.26.6 CHANGE YOUR ACCESS CODE

Your Dataroom (Center) Manager can define, via a Dataroom security policy applied to the app, that you must log in to the app using a complex, and thus a more secure access code. If you have defined a simple access code in the app itself, you then have to change this simple code to a complex code.

3.26.6.1 DEFINE A SIMPLE ACCESS CODE

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Access Code**.
3. Tap **Change access code**.
4. In the **Current access code** field, enter the current access code.
5. In the **New access code** field, enter a new access code.
6. In the **Confirm a new access code** field, confirm the new access code.
7. Tap the right arrow button.

The access code is changed and the access code screen is displayed.

3.26.6.2 DEFINE A COMPLEX ACCESS CODE

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Access Code**.
3. Tap **Define a complex access code**.
4. In the **Current access code** field, enter the current access code.
5. In the **New access code** field, enter a new access code.
6. In the **Confirm a new access code** field, confirm the new access code.
7. Tap the right arrow button.

The access code is changed and the access code screen is displayed.

Note: If you enter an access code that is not complex enough, you are requested to enter a new one.

Note: You can define a complex access code during initial setup by tapping the **Switch to complex access code** option on the page displayed directly after opening the app, see also Define an access code on page 16.

3.26.7 DEFINE THE DEFAULT DOWNLOAD BEHAVIOR FOR DATAROOMS

You can define whether all content, or only content changed or added within the last n days is downloaded by default. These download settings are applied during synchronization. Additionally, you can define whether automatic download is deactivated completely so that documents are only downloaded when users tap them or select a Download option manually.

3.26.7.1 SET THE DEFAULT DOWNLOAD BEHAVIOR FOR ALL CONTENT

You can define whether all content or only content changed or added within the last n days is downloaded by default, or whether to deactivate downloading all content completely so that documents are only downloaded when users tap them or select a Download option manually. For details see Frequently asked questions about the Download settings on page 52.

Note: If a Dataroom security policy is applied to the app, it overrules all settings defined in the **Options for downloading all content** area.

To set the default download behavior for all content:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Downloads** in the sidebar.
3. From the **Options for downloading all content** area, tap the option currently active and select the desired download behavior:
 - **Deactivate download:** With this option selected, the automatic file download is deactivated completely. Content is only downloaded when users tap a document or select a Download option manually.
 - **Download all content:** With this option selected, all content of the configured Datarooms is downloaded during synchronization. **Note:** Depending on the sizes of the configured Datarooms, downloading all content may take some time.

Note: If a Dataroom security policy is applied to the app and the retention period defined there is smaller than the download interval defined in the app, the value set for the retention period is applied as download interval.

- **User-defined download period:** Only content changed or added within the defined period is downloaded during synchronization. To shorten the period, tap - (minus). To extend it, tap + (plus).

Note: If a Dataroom security policy is applied to the app, the greater number of days of changed content interval and user-defined download period takes precedence. However, if the retention period defined in the security policy is shorter than the user-defined download period defined in the app, the value set for the retention period is applied as download interval.

3.26.7.2 FREQUENTLY ASKED QUESTIONS ABOUT DOWNLOAD SETTINGS

How can I update my downloaded documents with the latest server versions?

The system default value for the automatic synchronization is set to every hour. If you want to synchronize in between, tap the sync icon  in the top navigation bar.

How can I ensure that I get the latest versions for my downloaded documents if the Deactivate download setting is enabled?

If you want that the **Deactivate download** setting remains enabled, you need to download new versions of your downloaded documents manually by tapping them.

How can I define that all content is downloaded automatically?

If you want that all content of the configured Datarooms is automatically downloaded during synchronization, enable the Download all content setting, which you find under Options for downloading all content, see Set the default download behavior for all content on page 51.

Important note: Depending on the sizes of the configured Datarooms, downloading all content may take some time.

How can I define that only content modified within a certain period is downloaded automatically?

If you want that only document content of the configured Datarooms is automatically downloaded after a user-defined period, use the User-defined download period setting which you find under Options for downloading all content, see Set the default download behavior for all content on page 51. If you use this setting, make sure that you

or your users log in to the app on a regular basis. Make sure you set a reasonable value that fits the way you or your users work with the Brainloop Secure Client app.

Which settings should I use if I want to download everything manually?

If you want to download everything manually to your device, use the Deactivate download setting under Options for downloading all content, see Set the default download behavior for all content on page 51.

3.26.7.3 SHOW THE DOWNLOAD PROCESS FOR DATAROOMS OR FOLDERS

The **Downloads** page lists a maximum of 15 documents to be downloaded, including errors that might have occurred. The progress of the downloads is shown above, e. g. *In progress 4 - Queued 3*.

To show the download process:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Downloads** in the sidebar.
3. Tap **Show downloads**.
4. If necessary, tap the pause icon  to pause the download process or tap the resume icon  to continue it.
Tip: You can also pause and resume the download of an individual document by tapping the corresponding document.
5. Tap the clean icon  in the top navigation bar to delete all entries in the list of downloads.
If you have paused the download of documents, these documents are deleted from the list and not downloaded.

3.26.7.4 SET THE DEFAULT OPTION FOR SYNCHRONIZATION AND DOWNLOAD OVER WI-FI AND CELLULAR

You can define whether communication with the Dataroom server is allowed over wi-fi and cellular data connection, or over wi-fi only.

To set the default option for synchronization and download:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Downloads** in the sidebar.

3. From the **Allow synchronization and download** area, tap the option currently active and select one of these options:
 - **Over wi-fi and cellular:** With this option selected, autosynchronization is performed independent of the data connection mode.
 - **Over wi-fi only:** With this option selected, autosynchronization is skipped if only a cellular connection is available. **Note:** If you want to execute an action that involves server communication with this option being selected, you are asked if you want to continue anyway.

3.26.8 SHOW AUTO-INDEXING VALUES

If your Dataroom is set up to use the auto-indexing function, the index values can also be displayed in Brainloop Secure Client. **Note:** This option is only available as of Brainloop Secure Dataroom 8.40.000.

To show auto-indexing values:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **View** in the sidebar.
3. At the top of the page, slide the **Show indexes** button from **OFF** (gray) to **ON** (green).

3.26.9 CHANGE THE START SCREEN

By default, the **Documents** screen is the start screen. You can change the start screen and this setting is retained until the app is reset from the access code entry screen. Then, the **Documents** screen is the start screen again.

To change the start screen:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **View** in the sidebar.
3. In the **Default start screen** area, select the desired option:
 - **Documents:** Select the **Documents** screen as your start screen.
 - **Datarooms:** Select the **Datarooms** screen as your start screen.

3.26.10 HIDE SCREENS FROM THE BOTTOM NAVIGATION BAR

When not in use, you can hide the icons for the **Votes** screen and the **Events** screen from the bottom navigation bar. Votes and events will continue to be synchronized with the device.

To hide icons from the bottom navigation bar:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **View** in the sidebar.
3. In the **Bottom navigation bar** area, select the desired options:
 - Slide the **Hide Votes** button from **OFF** (gray) to **ON** (green) to hide the icon for the **Votes** screen.
 - Slide the **Hide Events** button from **OFF** (gray) to **ON** (green) to hide the icon for the **Events** screen.Slide the buttons from **ON** to **OFF** to unhide the icons again.

3.26.11 DEFINE SECURITY SETTINGS

The app provides different ways to log out. You can just log out, so that you only need to authenticate with your access code again the next time you open the app. Alternatively, you can log out and reset the PIN authentication at the same time. You must then authenticate again by entering a new one-time PIN you receive by SMS or email. In addition, you can define that the app is locked after a specified period of inactivity.

You can also change your password for Brainloop Secure Dataroom. This option is only available if your Dataroom is installed on a server with Brainloop Secure Dataroom version 8.40.000 or newer.

3.26.11.1 CHANGE YOUR PASSWORD

When you change your password for Brainloop Secure Dataroom in the web browser, you also need to re-authenticate to the corresponding server in the Brainloop Secure Client app. The message **Password required** is displayed. Enter your new password then.

Note: When you are in offline mode, you can also access your local documents without having to re-authenticate to the server with your new password. Only when you change into online mode, and you try to synchronize data, or when the device was locked before, you need to enter your new password.

You can change your password for Brainloop Secure Dataroom from within the app. Please note that this option is only available if the user's platform is installed with Brainloop Secure Dataroom version 8.40.000 or newer.

1. Tap **Settings** in the bottom navigation bar.
2. Tap **Security > Change password**.
3. On the **Change password** page, enter your old password, then your new password and repeat it. The minimum requirements for the password are shown underneath the password fields, that is minimum password length and minimum password strength.
4. Tap **Save**.
The password is saved for the Dataroom server.

3.26.11.2 LOCK THE APP AUTOMATICALLY

The app is locked automatically after a certain time of user inactivity and each time the device's autolock feature is activated. After expiration of the specified time, you must re-enter your access code to use the app again. The default period of time after which the app is locked is five minutes.

To lock the app automatically:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Security** in the sidebar.
3. To the right of the **Lock app after inactivity (minutes)** option, select one of these options:
 - To shorten the default period of five minutes, tap - (minus).
 - To extend the period, tap + (plus).

Note: You cannot set this value to zero. If a Dataroom security policy is applied to the app, you must re-authenticate by entering your access code once the defined time of inactivity has expired. Any shorter period defined in the security policy overrides the value defined in the app.

3.26.11.3 RESET SECONDARY AUTHENTICATION

Use this option to reset your current authentication against Datarooms that are protected by a PIN or security code. With this option, you must authenticate again by entering a new one-time PIN you receive by SMS or email or a new security code, respectively. All your Dataroom servers and Datarooms as well as your local documents remain on the device.

Please note that the PIN or security code will only be requested again after a fixed period of inactivity set by Brainloop.

To reset PIN or security code authentication:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Security > Reset secondary authentication**.

The PIN or security code is reset and the app is locked without any security prompt.

3.26.12 DEFINE THE HANDLING OF LOCAL DOCUMENTS

3.26.12.1 DELETE ALL DOCUMENTS MANUALLY

You can delete all local documents manually to free disk space on your device or for safety reasons, for example. Only the local documents downloaded to the device are deleted. The original documents remain stored in your Datarooms.

To delete all documents manually:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Delete > Delete all local documents**.
3. Confirm that you want to delete all local documents from your device.

All local documents downloaded to the device are deleted.

3.26.12.2 SET A DEFAULT RETENTION PERIOD FOR LOCAL DOCUMENTS

For all your Datarooms synchronized with your device, you can define that local documents that have been downloaded to your device can be deleted after expiration of a certain period. The original documents remain stored in your Datarooms.

To set a default retention period for local documents:

1. Tap the settings icon  at the bottom of the side navigation bar.

2. Tap **Delete** in the sidebar.
3. To the right of the **Delete local documents after (days)** option, select one of these options (default is OFF):
 - To define a period, tap + (plus).
 - To shorten this period, tap - (minus).

Note: If a Dataroom security policy is applied to the app, local documents are deleted automatically once the defined retention period has expired. Any shorter period defined in the security policy overrides the value defined in the app.

3.26.13 RESET THE APP

To reset the Brainloop Secure Client app:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Delete** in the sidebar.
3. Tap **Reset app**.

Important note: Resetting the app removes all your Dataroom servers, Datarooms, and all local documents from your device.

3.27 CONTACT BRAINLOOP SUPPORT

You can access support information and contact Brainloop Support directly from within the Secure Client app.

In the **Settings** menu or on the login page, tap **Support** to:

- > Open the setup guide or the user guide
- > Access the Customer Service Portal
- > Send an email to Brainloop Support
- > Send a log file and report an issue to Brainloop Support
- > Find the phone numbers of the Brainloop in-country support staff
- > Read the Brainloop Legal notice or Data protection terms

To send a log file and report an issue to Brainloop Support:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Settings > Support > Send log file with Mail app**. The current log is displayed.
3. In the top-right corner, tap **Send log file**.

4. Read the information message and tap **OK**.

A draft email message addressed to support@brainloop.com opens in the email program that is configured on the device. The log file is already attached to this draft email.

Note: If you are using the new Microsoft Outlook on Windows 11 you have to attach the log file manually. The path leading to this file is shown in the user interface.

5. Describe your issue in detail, share your username if you wish, attach screenshots by tapping the camera icon on the keyboard, and provide details about your device and the date and time when the issue occurred.
6. Tap **Send**.

To send an email to Brainloop Support:

1. Tap the settings icon  at the bottom of the side navigation bar.
2. Tap **Support > email support**. An empty email addressed support@brainloop.com is opened in the Windows Mail app.
3. Enter your question or concern in as much detail as possible and tap **Send**.

To read the Brainloop Legal notice or Data protection terms for using Brainloop Secure Dataroom Services:

1. Tap **Settings > Support**.
2. Tap the respective link at the bottom.