

# InsiderLog

A PART OF SERENDIPITY GROUP

USER GUIDE  
*ADVISORY*

# SUPPORT

## COMMON PROCEDURES AND EXPLANATIONS

In this manual we will go through the most common procedures in InsiderLog and explain how they work. If you run into any problems we ask that you first and foremost visit the support site, which you can access through the menu on the left in InsiderLog, or directly at <http://www.insiderlog.se/en/support/>.

There, we have collected questions and answers in order to help you during your work with InsiderLog, both concerning the system itself but also generally about MAR as well as insider information.

If your question involves the regulatory system we recommend that you start by examining the information present at FI:s website and in Nasdaq's FAQ.

# InsiderLog

## GUIDE OVERVIEW

### SUPPORT

### LOG IN

### ADMINISTRATORS

*Add New Insider*

*Change account details for yourself as an administrator*

*Delete administrator's account*

### INSIDER LIST

*Create new insider list*

*Add a new insider*

*Edit insider list*

*Export closed insider list*

*Close insider list*

### SETTINGS

*Settings for outbound email server*

*Privacy Policy*

*Email templates*

*Export database*

*License server*

*Remove administrator's account*

## QUESTIONS?

Should you not find the answer to your question in the manual, these links or on the support site, please send us an email at:

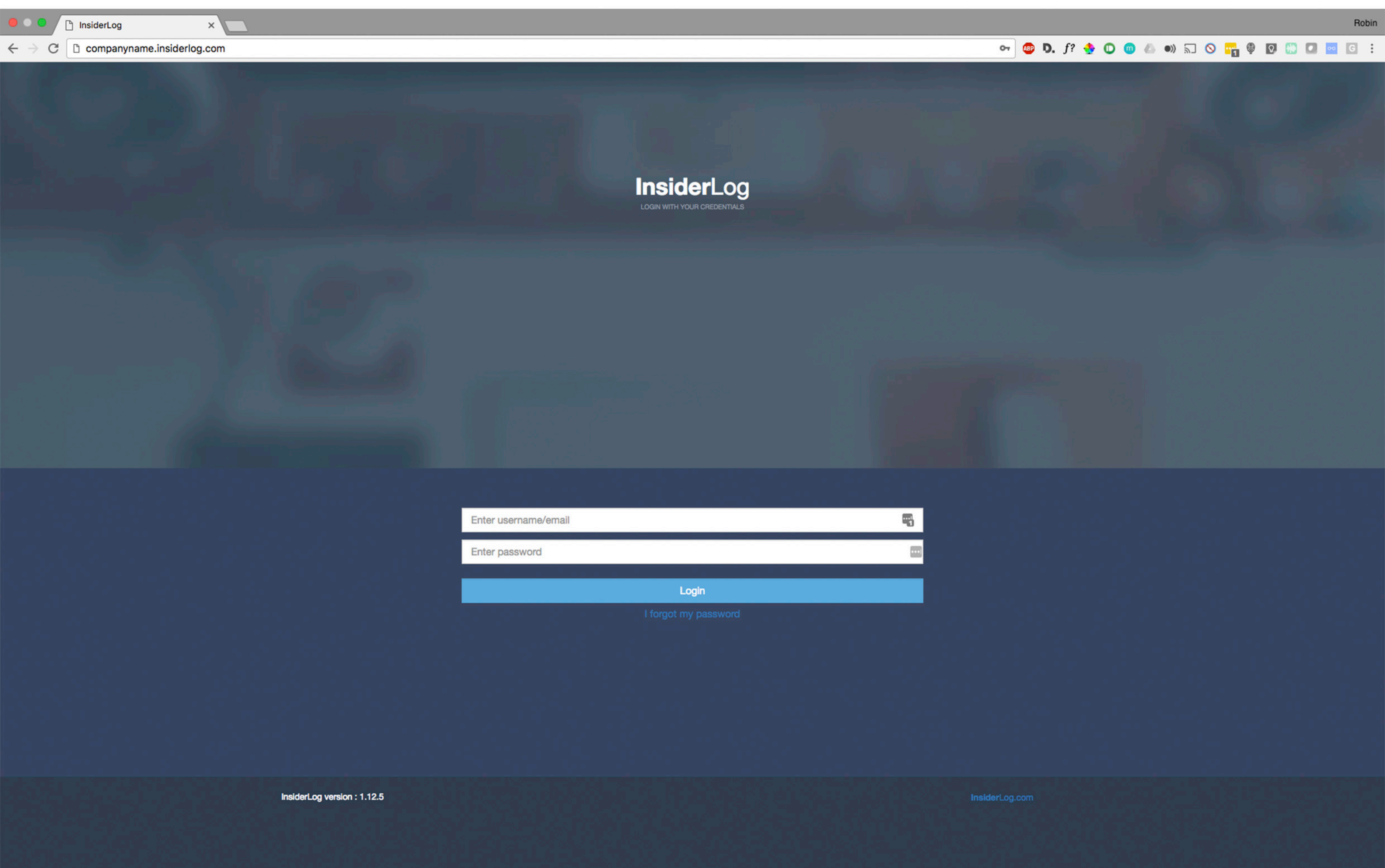


[support@insiderlog.com](mailto:support@insiderlog.com)



# LOG IN

1. Type “companyname.insiderlog.com” directly into the web browser (excluding www) to access your login page.



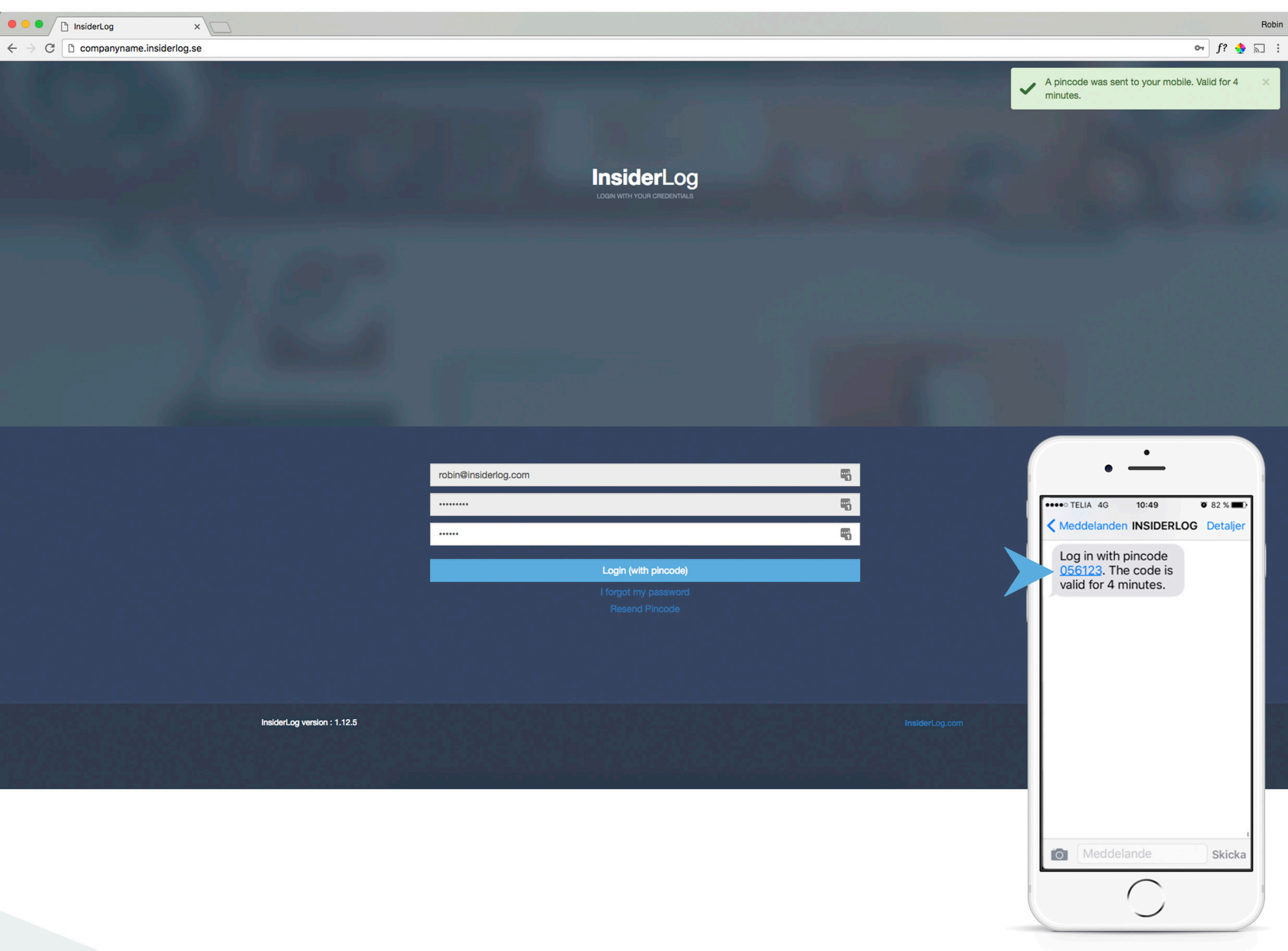


# LOG IN

2. Enter your e-mail address along with your password and click "Login".

3. You will now receive a pin code that will be sent to you through a text message. Write the code into the third box and click Login (with pin code). If for some reason you have not received the pin code, try clicking "Resend pin code".

4. Click "Login".





# ADMINISTRATORS

All administrators can be found in the bottom right corner on the start page. Below their name you will see their specific classification, which can be either "MAIN\_ADMIN" or "SUB\_ADMIN". This is also from where accounts can be removed.

- Main administrators can open new insider lists and access all currently open lists. They can also invite new administrators, sub-admins and main-admins. On the following page we go through the procedures related to this.
- Sub administrators can open new insider lists and can access lists they have been assigned to. They can only add already registered admins to lists they have access to. Under the section for creation of insider lists we go through the procedures related to this.

The screenshot displays the InsiderLog web application interface. On the left is a dark blue sidebar with the 'InsiderLog' logo and user information for Robin Lundberg (ADVISORY DEMO AB, 556123-1111). The sidebar menu includes 'Start', 'Active insider lists', 'Closed insider lists', 'Settings', 'My Account', 'Contacts', 'Support', and 'Log out'. The main content area is divided into three sections: 'COMPANY AB' with a table of insider lists, 'NEWS' with a promotional message, and 'ADMINISTRATORS' which is highlighted with a blue border. The 'ADMINISTRATORS' section lists four users with their roles and email addresses, each with a 'Remove' button. At the bottom of this section are an 'Add administrator' button and a pagination control showing page 1 of 3.

**InsiderLog**

**Robin Lundberg**  
ADVISORY DEMO AB  
556123-1111

**Start**

- Active insider lists
- Closed insider lists
- Settings
- My Account
- Contacts
- Support
- Log out

**COMPANY AB**

TITLE	LAST UPDATED	INSIDERS	STATUS
Project X	2018-02-07 09:53	0	Complete

**NEWS**

Tell your friends!

We now have more than 170 customers and are growing rapidly! Do you know another company that should also use InsiderLog?

If a new customer mentions that you both of your companies will get a 25% discount on your next annual fee.

Let us know at [sales@insiderlog.com](mailto:sales@insiderlog.com)

**ADMINISTRATORS**

<b>John Engholm</b> (MAIN_ADMIN)	john@sprofession...	<a href="#">Remove</a>
(SUB_ADMIN)	amanda.l@sprofe...	<a href="#">Remove</a>
<b>Karl-Anton Brötmark</b> (SUB_ADMIN)	karl-anton@inside...	<a href="#">Remove</a>
(MAIN_ADMIN)	mazdak@insiderlo...	<a href="#">Remove</a>

[+ Add administrator](#)

< 1 2 3 >



# ADMINISTRATORS

1. Click “+Add administrator” to add a new administrator.

InsiderLog

Robin Lundberg

ADVISORY DEMO AB

556123-1111

Start

Active insider lists

Closed insider lists

Settings

My Account

Contacts

Support

Log out

COMPANY AB

TITLE	LAST UPDATED	INSIDERS	STATUS
Project X	2018-02-07 09:53	0	Complete

+ Add insider

NEWS

Tell your friends!

We now have more than 170 customers and are growing rapidly! Do you know another company that should also use InsiderLog?

If a new customer mentions that you gave them the tip, both of your companies will get a 25% discount on your next annual fee.

Let us know at [sales@insiderlog.com](mailto:sales@insiderlog.com)

ADMINISTRATORS

John Engholm

(MAIN\_ADMIN)

john@sprofession...

- Remove

(SUB\_ADMIN)

amanda.l@sprofe...

- Remove

Karl-Anton Brötmark

(SUB\_ADMIN)

karl-anton@inside...

- Remove

(MAIN\_ADMIN)

mazdak@insiderlo...

- Remove

+ Add administrator

<

1

2

3

>



# ADMINISTRATORS

2. Insert the e-mail address (lowercase letters, i.e. erik.eriksson@bolaget.se instead of Erik.Eriksson@bolaget.se)

3. Click "Proceed". The person will now receive an e-mail containing a link that will let them register as a main administrator.

The screenshot displays the InsiderLog web application interface. On the left is a dark sidebar with the user's name 'Robin Lundberg' and a list of navigation items: Start, Active insider lists, Closed insider lists, Settings, My Account, Contacts, Support, and Log out. The main content area is light gray and contains a modal dialog titled 'Add administrator'. The dialog has the text 'This will invite a new administrator to the system' and an 'Email' input field with a speech bubble icon. Below the input field are 'Proceed' and 'Cancel' buttons. At the bottom of the dialog, it says 'An email will be sent with instructions on how to register'. In the background, a table lists administrators: John Engholm (MAIN\_ADMIN), Karl-Anton Brötmark (SUB\_ADMIN), and Mazdak (MAIN\_ADMIN), each with a 'Remove' button. A '+ Add insider' button is visible on the right, and a '+ Add administrator' button is at the bottom of the table. The footer shows 'InsiderLog version : 1.13' and the website 'InsiderLog.com'.

**InsiderLog**

**Robin Lundberg**  
ADVISORY DEMO AB  
556123-1111

- Start
- Active insider lists
- Closed insider lists
- Settings
- My Account
- Contacts
- Support
- Log out

**Add administrator**  
This will invite a new administrator to the system

Email

**Proceed** **Cancel**

An email will be sent with instructions on how to register

**John Engholm** (MAIN\_ADMIN) john@profession... **Remove**

(SUB\_ADMIN) amanda.l@sprofe... **Remove**

**Karl-Anton Brötmark** (SUB\_ADMIN) karl-anton@inside... **Remove**

(MAIN\_ADMIN) mazdak@insiderlo... **Remove**

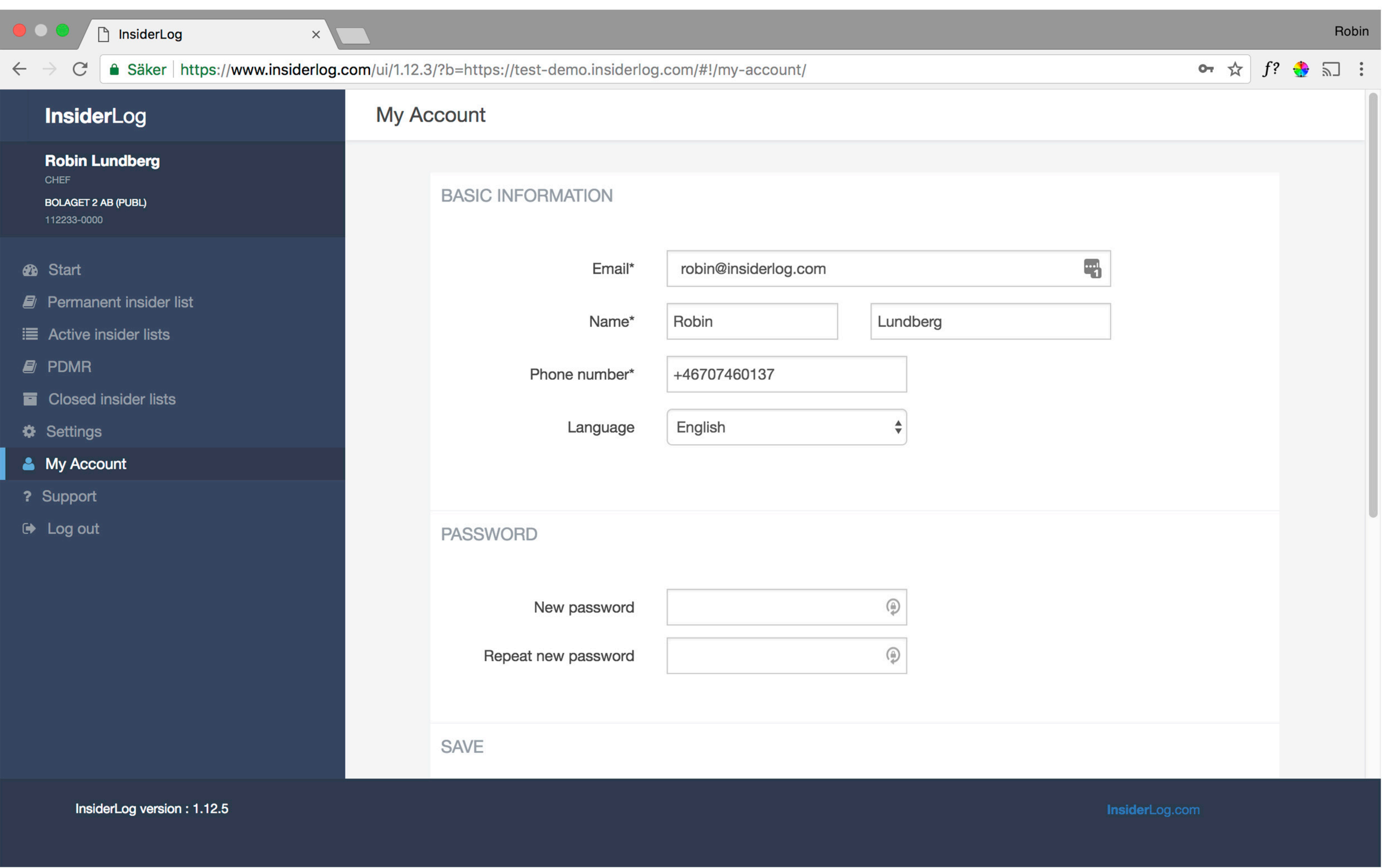
**+ Add administrator** < 1 2 3 >

InsiderLog version : 1.13 InsiderLog.com



# CHANGE ACCOUNT DETAILS FOR YOURSELF AS AN ADMINISTRATOR

- 1. Click on "My Account" in the left panel to change your own password or phone number.
- 2. Fill in the details. A pin code will be sent to the assigned phone number.  
Note that the pin code must be entered before the details can be saved.

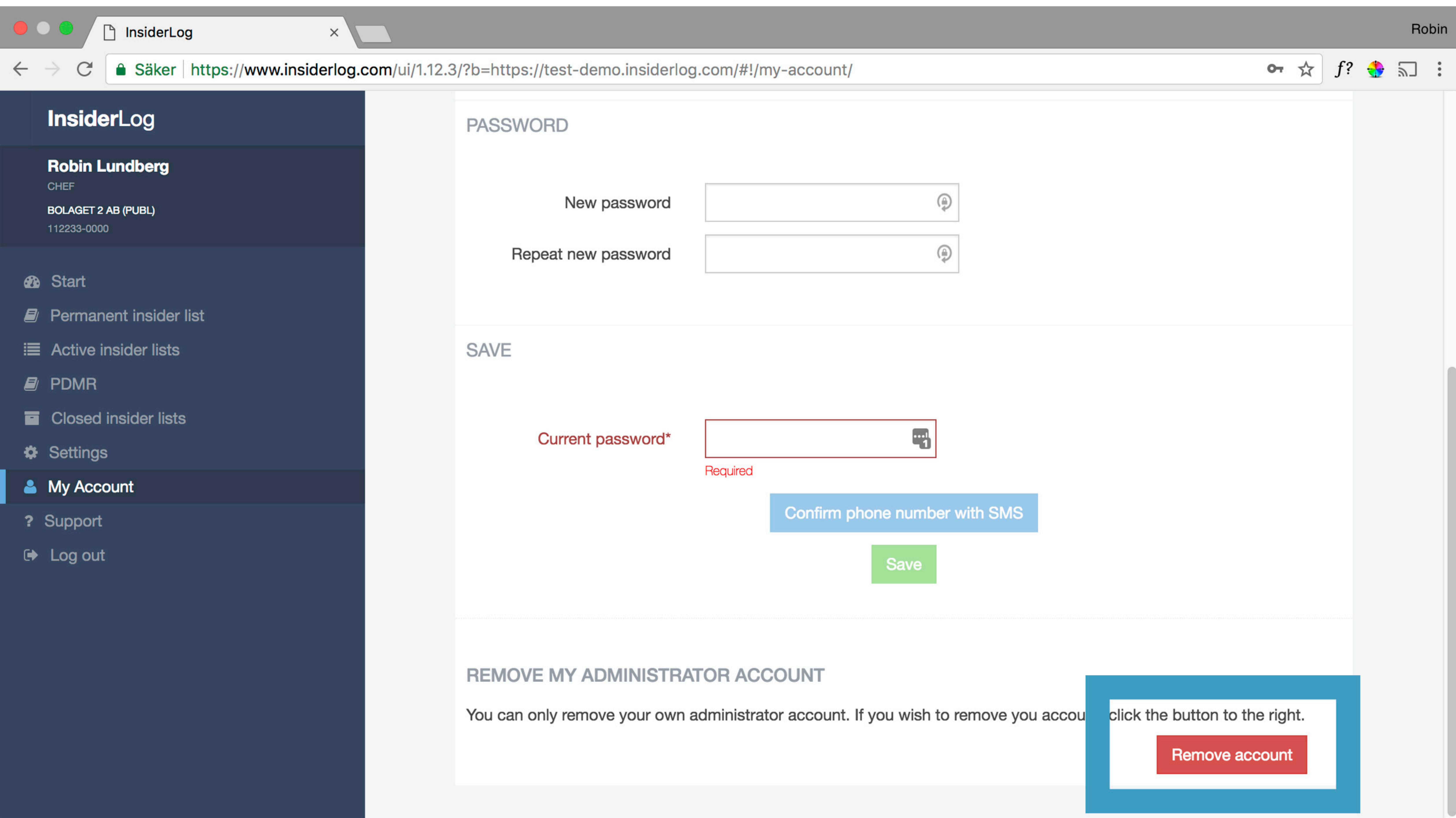




# DELETE ADMINISTRATOR'S ACCOUNT

- 1. Click on "My Account" in the left panel and scroll all the way down the page.
- 2. Click on "Remove Account" to delete the administrator account.

*Note that only the administrator themselves will be able to delete the account.*



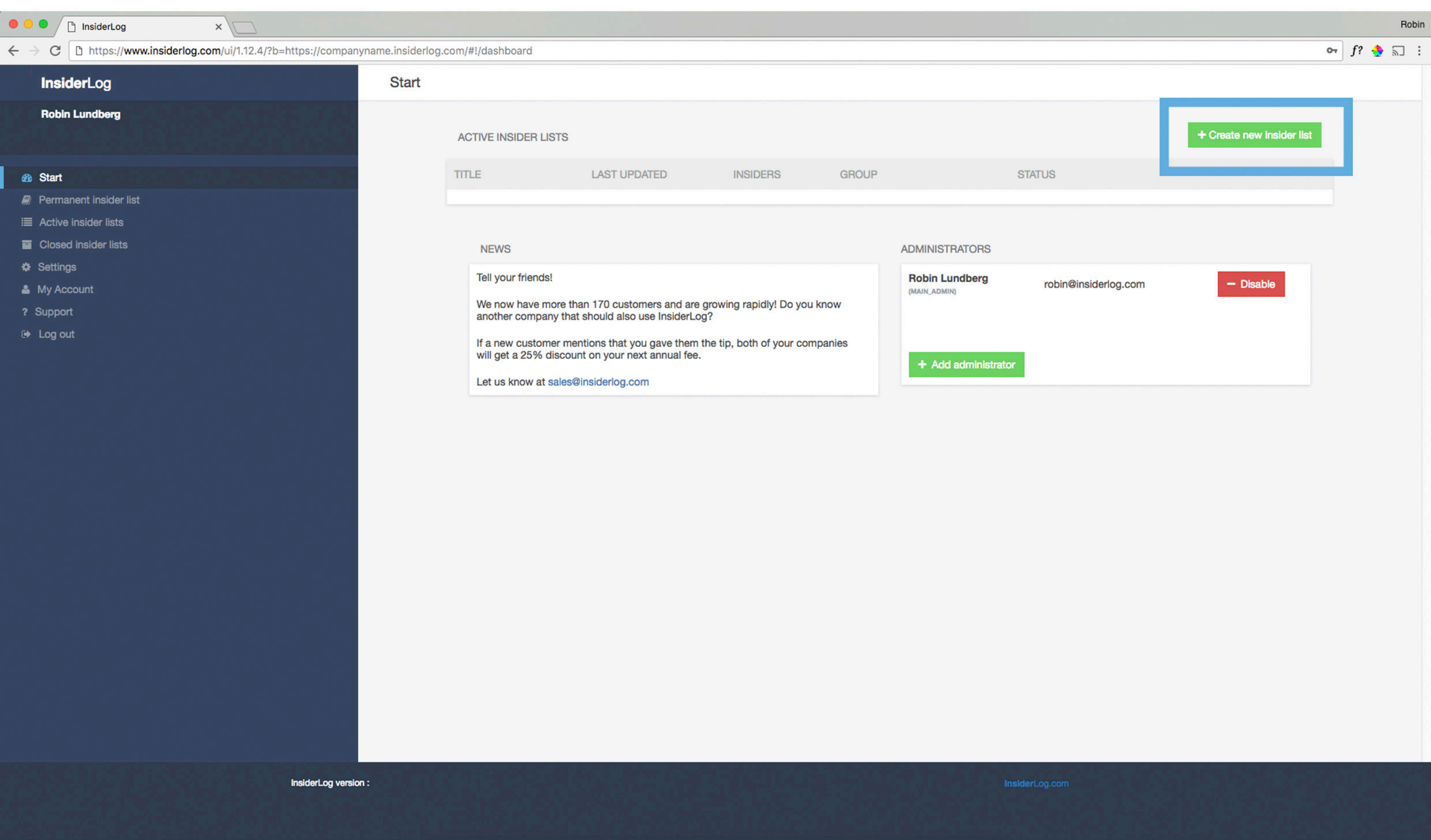


# INSIDER LIST

## CREATE NEW INSIDER LIST

1. Log in to InsiderLog.

2. Click "Create new insider list" in the upper right corner.





CREATE NEW INSIDER LIST

3. Fill in the basic information about the insider list.

- Client = Name of client, either existing or a new one. If it is a previous client an autofill suggestion should appear.
- Corp reg. no = Registration number of client company. Used to make sure no duplicate companies are added due to misspellings or different writings of same company name.
- Project title / event = The project name for the insider list, eg. Project Alpha or Q2 report. What you write here will be included in the e-mail that will be sent out to each insider, "You have access to insider information XX".
- Inside information = Short description of the purpose of the insider list (what you write here will not be visible for anyone except the administrator and only in the exported insider list
- Responsible persons = Name(s) of person/-s that are responsible for the inside information (here the ones who made the decision to delay disclosure as well as the decision concerning the start of the delay and its expected end, the ones who guarantee the ongoing control that the terms and conditions of the delay are being met and the ones who make the decision to disclose the insider information are included).
- Additional notes = Optional box, can be left blank

InsiderLog

Robin Lundberg

ADVISORY DEMO AB

556123-1111

Start

Active insider lists

Closed insider lists

Settings

My Account

Contacts

Support

Log out

Basic information

Client

Company AB

Start typing the name of existing client or create a new

Corp reg. no

012395592

Project title / event

Project Gamma

This will be included in the email notice to all insiders

Inside information

Plans to acquire OS

Internal note, will not be shown externally

Responsible persons

Robin Lundberg

Additional notes

Sub-admin(s)

Select person...

InsiderLog version : 1.13

InsiderLog.com



## CREATE NEW INSIDER LIST

### 4. New sub administrators can be created and added to the current list from the field "Sub-admin(s)".

Enter the e-mail of the sub-admin you want to invite. If the admin has been added previously an auto-fill suggestion should appear.

If the person already has an account he/she will receive an e-mail notification about access to that specific list.

If the person don't have an account he/she will receive an e-mail with instructions on how to create an account and info about access to that specific list.

InsiderLog

Robin Lundberg

ADVISORY DEMO AB

06123-1111

Start

Active insider lists

Closed insider lists

Settings

My Account

Contacts

Support

Log out

Basic information

Client

Company AB

Start typing the name of existing client or create a new

Corp reg. no

012395592

Project title / event

Project Gamma

This will be included in the email notice to all insiders

Inside information

Plans to acquire OS

Internal note, will not be shown externally

Responsible persons

amanda.l@professionals.se

karl-anton@insiderlog.com

john.engholm@insiderlog.se

info@insiderlog.se

noreply@insiderlog.com

john@insiderlog.com

Additional notes

Sub admin(s)

Select person...



# INSIDER LIST

## CREATE NEW INSIDER LIST

Selected sub-admins are displayed and can be removed by pressing the "x".

To add additional admins click below current names.

InsiderLog

Robin Lundberg

ADVISORY DEMO AB

556123-1111

Start

Active insider lists

Closed insider lists

Settings

My Account

Contacts

Support

Log out

Basic information

Client

Company AB

Start typing the name of existing client or create a new

Corp reg. no

012395592

Project title / event

Project Gamma

This will be included in the email notice to all insiders

Inside information

Plans to acquire OS

Internal note, will not be shown externally

Responsible persons

Robin Lundberg

Additional notes

Sub-admin(s)

karl-anton@insiderlog.com

john@insiderlog.com

InsiderLog version : 1.13

InsiderLog.com



# INSIDER LIST

## EDIT INSIDER LIST

- 1. Click on the insider list that is to be changed in the list with active (open) insider lists.
- 2. Click on "Edit insider list" to make changes in the basic information or the examination of delayed disclosure.

InsiderLog

Robin Lundberg

ADVISORY DEMO AB

556123-1111

Start

Active insider lists

Closed insider lists

Settings

My Account

Contacts

Support

Log out

Project Gamma

CLIENT > COMPANY AB

ACTIVE INSIDER LIST > PROJECT GAMMA

Plans to acquire OS

EXPORT LOGBOOK

Edit insider list

Close insider list

TITLE	RESPONSIBLE	CREATED	LAST UPDATED	INSIDERS	SUB ADMINS
Project Gamma	Robin Lundberg	2018-02-07 14:42	2018-02-07 14:44	0	karl-anton@insiderlog.com, john@insiderlog.com

INSIDERS

Search... 0 Found

TIME	NAME	COMPANY	EMAIL	STATUS
------	------	---------	-------	--------

10

+ Add insider

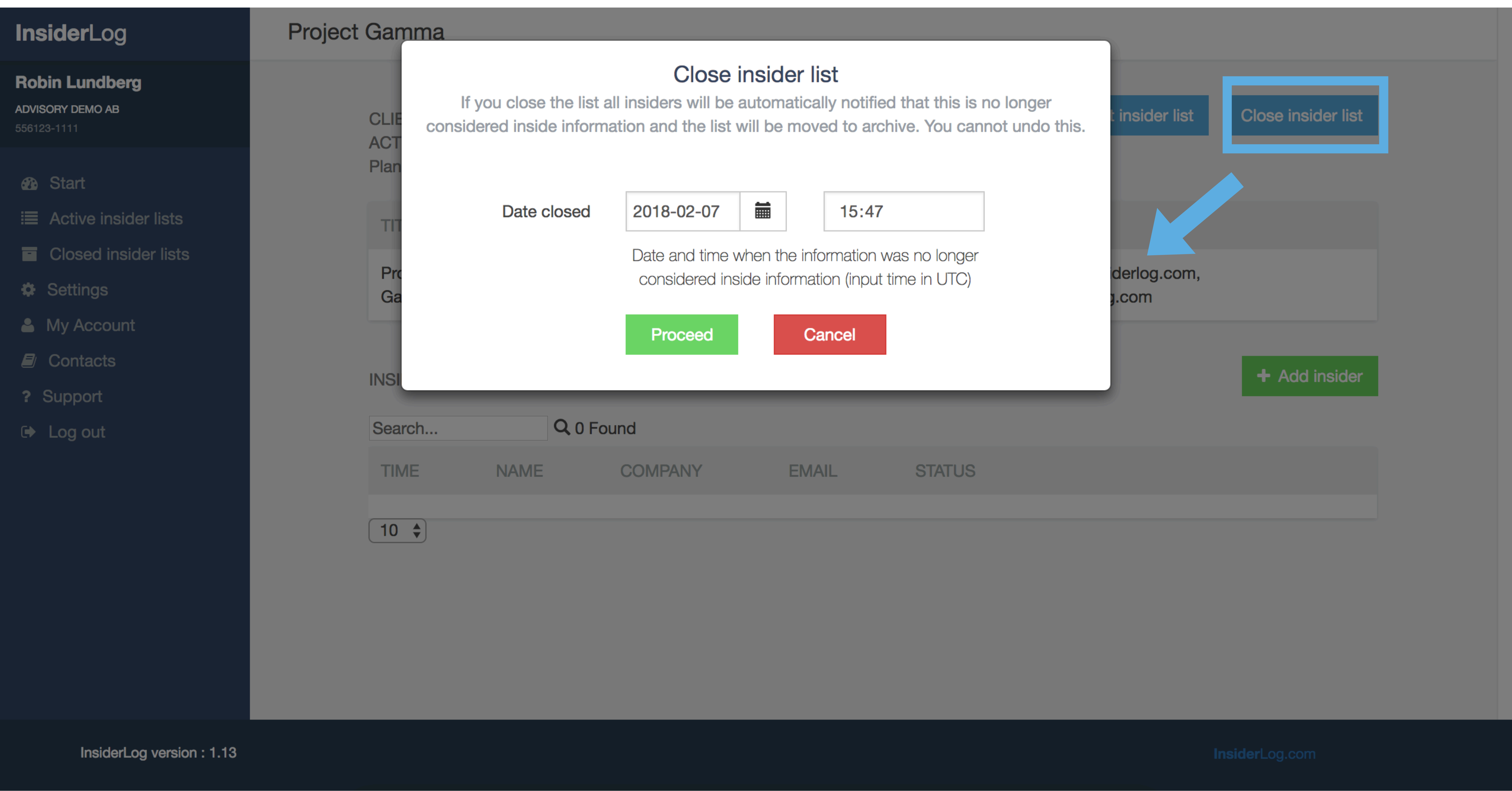


# INSIDER LIST

## CLOSE INSIDER LIST

Click on the insider list you want closed. It is possible to close an insider list even if it is "Incomplete".

- 1. Click on "Close insider list".
- 2. Input the date and time for when the information was no longer considered insider information (input time in UTC).
- 3. Click "Proceed".





# INSIDER LIST

## EXPORT CLOSED INSIDER LIST

1. Click on "Closed insider lists" in the left panel.
2. Click on "Export" to get a printable PDF of the insider list. The export includes the basic information, examination of delayed disclosure, the insider list and a chronological occurrence log.

InsiderLog

Robin Lundberg

CHEF

BOLAGET 2 AB (PUBL)

112233-0000

Start

Permanent insider list

Active insider lists

PDMR

Closed insider lists

Settings

My Account

Support

Log out

Closed insider lists

TITLE	RESPONSIBLE	CREATED	CLOSED	INSIDERS	GROUP	EXPORT
Project Alpha	Robin Lundberg	2018-01-22 14:10	2018-01-22 14:26	1	MAIN ADMIN GROUP	+ Export
Project Beta	John Engholm	2018-01-09 12:23	2018-01-18 15:34	0	MAIN ADMIN GROUP	+ Export
Project X	John Engholm	2018-01-09 12:26	2018-01-18 15:33	0	MAIN ADMIN GROUP	+ Export
Project Y	John Engholm	2018-01-10 13:46	2018-01-18 15:33	0	MAIN ADMIN GROUP	+ Export
Project Mac	John Engholm	2017-10-03 12:58	2018-01-18 09:18	2	MAIN ADMIN GROUP	+ Export
Project Liz	Robin Lundberg	2017-11-21 10:34	2018-01-17 12:00	1	MAIN ADMIN GROUP	+ Export
Project Citrus	John Engholm	2018-01-10 13:48	2018-01-10 14:06	0	MAIN ADMIN GROUP	+ Export
		2018-01-10	2018-01-10		MAIN ADMIN	

InsiderLog version : 1.12.6

InsiderLog.com



## OVERVIEW OF SETTINGS

### *Settings for outbound email server*

These are preset and are not to be changed, if not to change mail account or if you ex. change the password for your mail server.

### *Privacy Policy*

Here you can add a link to an internal privacy policy you might have, to be accepted by insiders when listed.

### *Email templates*

Please read our support site under "I want to change the mail templates" (<http://www.insiderlog.se/en/support/>) before you change the templates.

### *Export database*

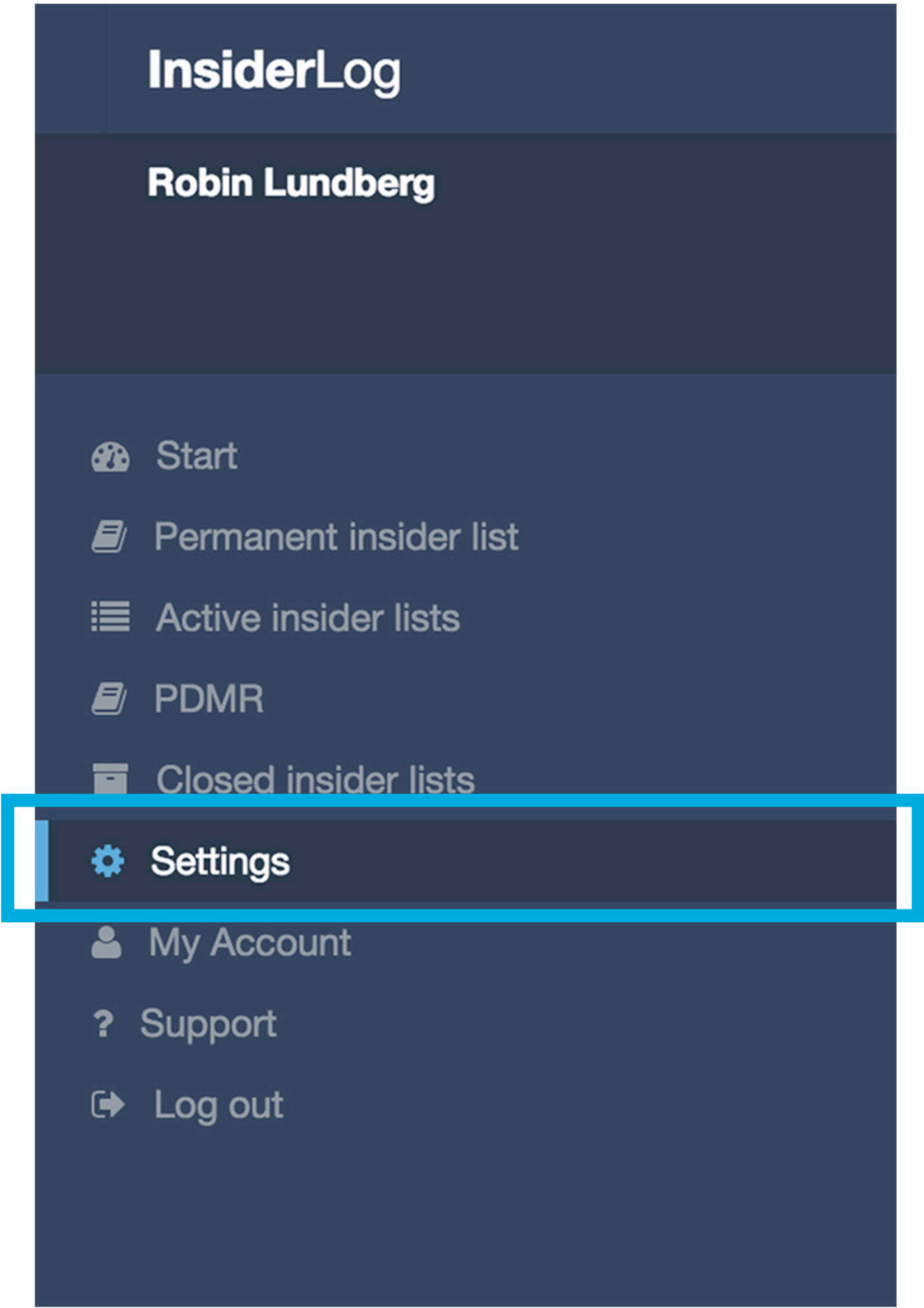
Export the complete database

### *License server*

Update to the latest version. Note that this is done automatically if you have activated automatic updates.

### *Remove administrator's account*

Click "Remove account" to delete your administrator account. ATTN! It is important that another administrator is registered, or you will be locked out of the system.





# InsiderLog

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[WWW.INSIDERLOG.SE](http://WWW.INSIDERLOG.SE)