

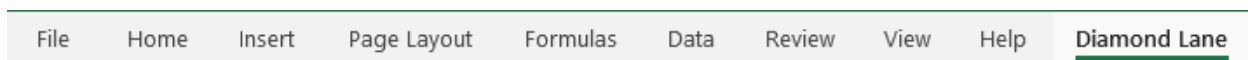
Diamond Lane Help Guide

Commonly used terms in this document

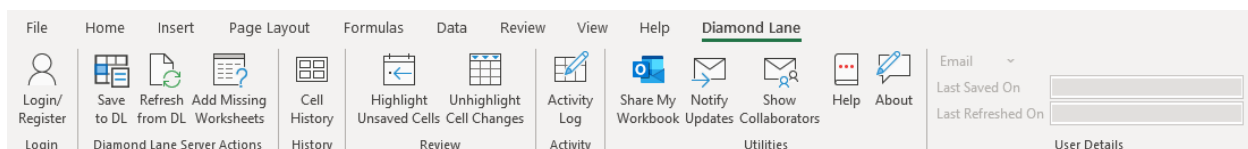
- **Digital Ledger:** The Digital Ledger is a temporal datastore that stores all cells and formulae of an Excel workbook individually and tracks their changes with a timestamp. The Digital Ledger runs in a secure cloud environment.
- **Save to DL:** Allows data in the current sheet to be saved in the database server (Digital Ledger) in the cloud.
- **Refresh Data from DL:** Retrieves data for all the changes from the Digital Ledger
- **Owner:** The person who initiates the collaboration. He/She emails an invitation with the workbook attached to the intended audience
- **Collaborator(s):** These are the team member(s) to whom the Owner has emailed the workbook.
- **Collaboration:** When an owner decides to share a workbook with one of more other users, a collaboration is initiated. This means that once invited and registered, all users can collaborate on a shared set of Excel data housed in the cloud. Users can simultaneously interact with the Excel data without locking, and all changes are captured and versioned at the cell level for review.
- **History:** Diamond Lane automatically keeps track of every change made by the Owner and Collaborator, so the user can view/review the sequence of changes which are timestamped in the Digital Ledger.

Getting Started

When you open the MS EXCEL document after installing Diamond Lane, you will see the menu items

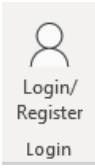


When you click on the Diamond Lane menu, the following ribbon shows up.



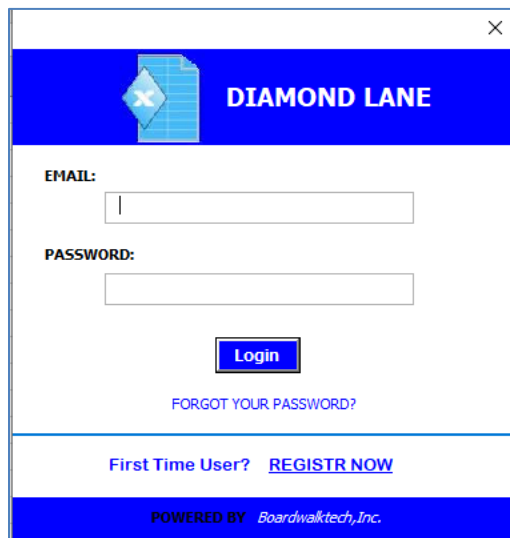
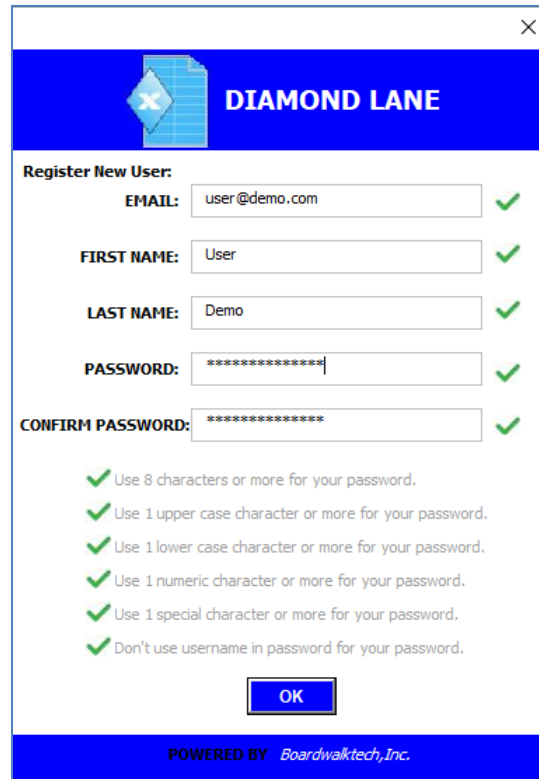
Each functional icon on the ribbon is explained below:

Initiating a Collaboration



1. Register/Login:

In order to use Diamond Lane, you must first Register. The registration process is very simple. Click on Login/Register then the **Register Now** link. Enter your name, email and establish a password. Once you are registered login requires only email and password.

A dialog box titled "DIAMOND LANE" with a close button (X) in the top right. It contains an "EMAIL:" field, a "PASSWORD:" field, a "Login" button, and a "FORGOT YOUR PASSWORD?" link. At the bottom, it says "First Time User? [REGISTR NOW](#)" and "POWERED BY Boardwalktech, Inc." at the very bottom.A dialog box titled "DIAMOND LANE" with a close button (X) in the top right. It is titled "Register New User:" and contains fields for "EMAIL:" (user@demo.com), "FIRST NAME:" (User), "LAST NAME:" (Demo), "PASSWORD:" (masked with asterisks), and "CONFIRM PASSWORD:" (masked with asterisks). Each field has a green checkmark to its right. Below the fields is a list of password requirements, each with a green checkmark: "Use 8 characters or more for your password.", "Use 1 upper case character or more for your password.", "Use 1 lower case character or more for your password.", "Use 1 numeric character or more for your password.", "Use 1 special character or more for your password.", and "Don't use username in password for your password." At the bottom is an "OK" button and "POWERED BY Boardwalktech, Inc." at the very bottom.

The following password complexity is enforced:

- Password should contain minimum of 8 characters
- Password should have at least one UPPER CASE character
- Password should have at least one lower case character
- Password should have at least one numeric character
- Password should have at least one special character
- Password should not repeat characters
- Password should be different from the username
- Once all fields are correctly entered, you will see all green checkmarks, then click the OK to complete the registration.

You will then be automatically logged in.

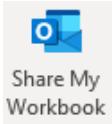


2. Save to DL

Press on the **Save to DL** button when you are ready to share your changes with the other collaborators. This action saves your data locally as well as on the DL server. Note that if you are not already logged in, the Login/Register dialog will be displayed.

- The first time Save to DL is selected, the active worksheet tab is saved to the DL on the server
- A progress bar will be displayed that shows the data saving progress
- Any changes to values and formulae in the worksheet are submitted to the DL on the server and are now available for collaborators to view.

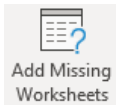
Diamond Lane uses a fully secured, transaction chained, time series based digital ledger database to allow seamless Excel collaboration.



3. Share my Workbook:

This feature is the cornerstone of collaborating using Diamond Lane. The workbook owner can initiate a collaboration by clicking **Share My Workbook**. This will create an Outlook email with the workbook as an attachment. Put in the email addresses of the people you want collaborate with, then send them the email.

For non-Outlook email clients, Diamond Lane supports copying the pre-filled message text to the clipboard for pasting. The user can open create an email, paste the message, attach the workbook, fill in the emails and send it out for collaboration.

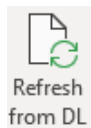


4. Get Missing Worksheets

As part of the collaboration, new worksheets may be added by the owner at any time. Collaborators are notified of new sheets available and can click “Get Missing Worksheets” to bring those sheets into their respective workbooks.

Any new sheet(s) added by the owner is added to Collaborator’s workbook. A “PROGRESS BAR” is displayed when the sheets are added. This ensures that user is aware of the action being performed.

Review Changes



1. Refresh from DL

Press on the Refresh from DL command button when you are ready to bring in changes made by other users. Note that if you are not already logged in the “LOGIN” dialog will be displayed. Once you enter your credentials, the refresh will commence, and a progress bar will be displayed that shows progress.

When the Refresh from DL command is selected, the following happens:

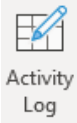
- The first time Refresh is selected, all spreadsheet data is refreshed from the server in the cloud.
- From the second refresh onwards, only incremental changes are refreshed from the server.

You can then see the changed values by hovering over the cells that have an Excel comment added to them.



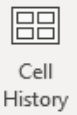
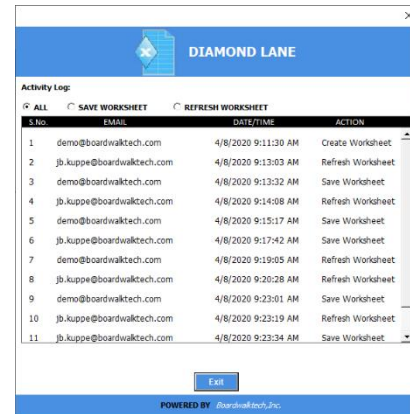
2. Unhighlight Cell Changes:

Once the user has reviewed highlighted changes shown by Excel comments, the user can remove the comments with this command.



3. View Activity:

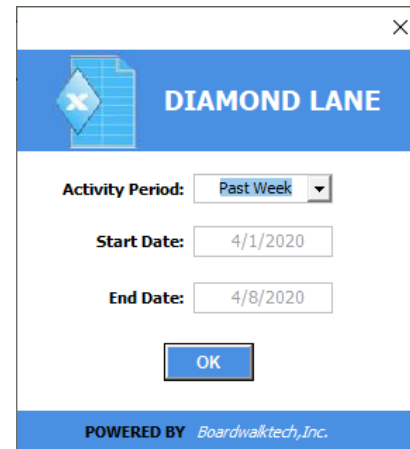
The Activity Log can be opened on demand to see who all have saved their changes or refreshed from the server



4. View Cell History:

At any time, a user can review the cell history to see who, what, and when the values were changed. This is done not only for the data but for formulae as well. The first window that appears when you click View Cell History is the activity period. The activity period is defaulted to PAST WEEK. The date range can be changed by the user

This is a unique feature of Diamond Lane that leverages transaction chaining. No data is lost and all changes are time stamped (with date/time and username) and stored. At any time, user can review the cell history to see how, who and when the values were changed. This becomes critical in budgeting or revenue projection or forecasting activities. This is done not only for the data but for formulae as well.



Make Updates



1. Highlight Unsaved Cells:

If the user has been working on a worksheet for a long time, it is easy to lose track of the changes made. This feature will highlight all the changes made since the last DL server save. This check helps to avoid accidental mistakes going to the DL.



2. Refresh Workbook (from the server):

When the Refresh from DL command is selected, the following happens:

- The first time Refresh is selected, all spreadsheet data is refreshed from the server.
- From the second refresh onwards, only incremental changes are refreshed from the server.

Press on the Refresh from DL command button when you are ready. Changes made by other users will then be brought into your workbook. You can see the changed values by hovering over the cells that have an Excel comment added to them.

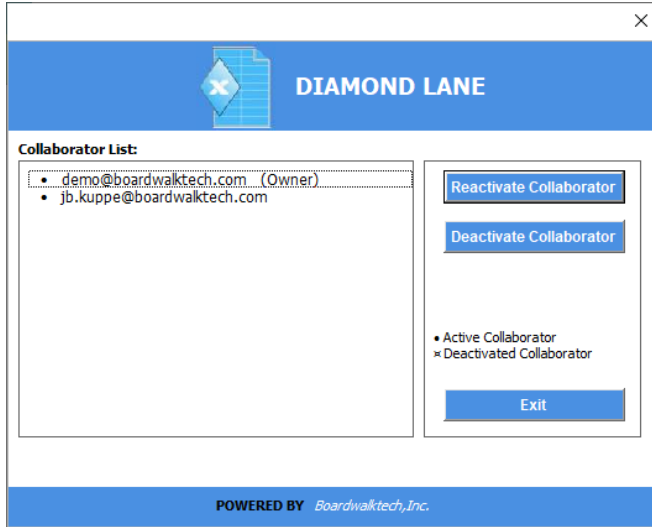
If you are not already logged in the “LOGIN” dialog will be displayed. Once you enter your credentials, a progress bar will be displayed that shows the data refreshing progress.

Control and Configure



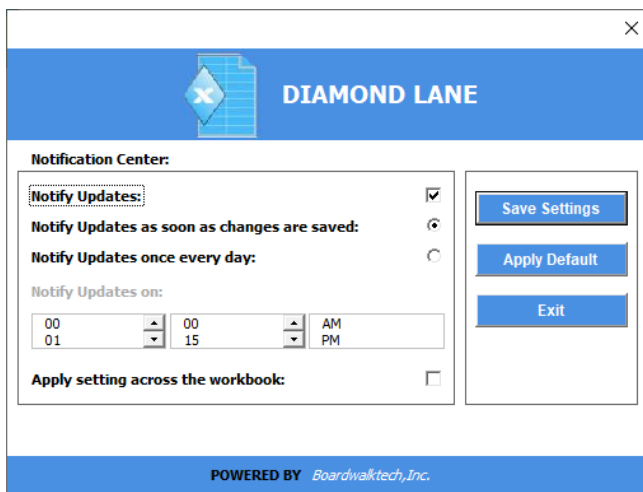
1. Show Collaborators

When the user clicks **Show Collaborators**, a window displays that lists the owner and all the collaborators. The owner can deactivate an existing user or reactivate them as necessary.



2. View Notifications:

Notifications provide transparency. Users can configure to receive notifications in real time or once a day as a digest. As you collaborate with users in different time zones, this functionality helps you to understand whether you need to refresh and review prior to saving your changes to the server.



The default setting for OWNER is immediate notification. This can be changed if needed. When a collaborator logs in for the first time, the Owner is notified regardless of configuration.