



# Helios Login Guide

January 2023

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## 1. General Information

### 1.1 Contact details

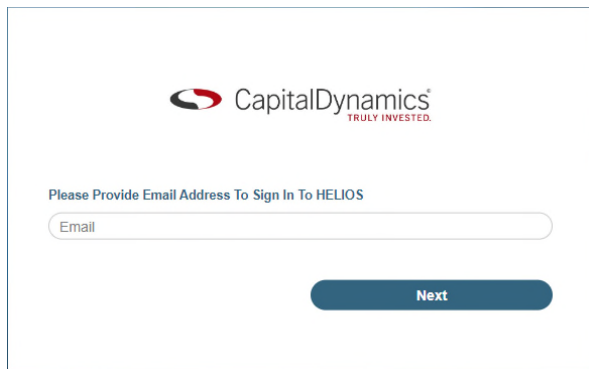
Should you have any questions or want to report any issues or provide feedback on Helios, please email the Client Relations team at [clientrelations@capdyn.com](mailto:clientrelations@capdyn.com). Additional contact details are below.

### 1.2 Browser

Helios is optimized for most mainstream web browsers, but is best experienced in Google Chrome.

### 1.3 Logging into Helios

Helios is hosted by Colmore, our fund administrator. Please use this link to obtain access: <https://capdyn-ext.mycolmore.com>. You will be greeted by a login page as shown below:



The screenshot shows a login page for Helios. At the top center is the CapitalDynamics logo with the tagline 'TRULY INVESTED.' Below the logo, the text reads 'Please Provide Email Address To Sign In To HELIOS'. Underneath this text is a text input field with the placeholder 'Email'. To the right of the input field is a dark blue button with the text 'Next' in white.

The login page prompts you for your email address. This will be the email address to which your HELIOS invitation was sent. For existing users, this is your existing email address registered in HELIOS.

**Please note that for security purposes, shared (i.e. group) e-mail addresses are not granted Helios access. Shared e-mail addresses can be set up to receive email notifications, in order to provide an alert when a new document has been uploaded to the portal.**

If your email account is connected to a Microsoft Personal Account (for example, Office 365) you can log in to HELIOS using your own personal details, including your password.

If your email domain is managed by your organization and is federated with Azure AD, you can log in using your organization details, including your network/account password from your organization. You will likely see your company logo on the login/agreement page.

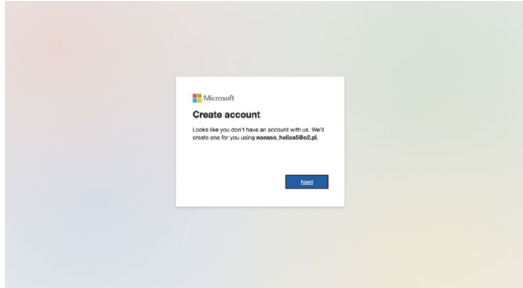
Following the entry of your email address, HELIOS will guide you through a number of steps before you access your data and documents. As mentioned above, this can vary depending on your email account type as detailed in the following pages.

Upon logging in to Helios, the full User Guide will then be available to view and download in the 'Documents' section.

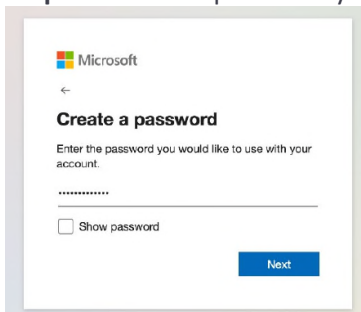
If your email is related to accounts other than those described above, you may need to follow some, if not all, of the following steps:

**Step 1.** Visit your HELIOS address: <https://capdyn-ext.mycolmore.com>. Once you have entered your email address and clicked *Next* you will be redirected to create Microsoft Personal Account process.

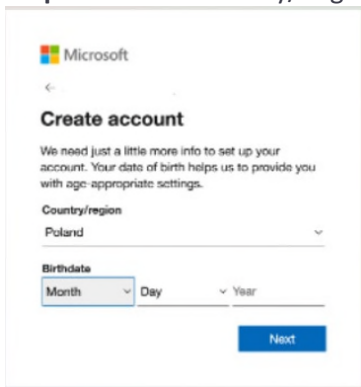
**Step 2.** Click *Next*.



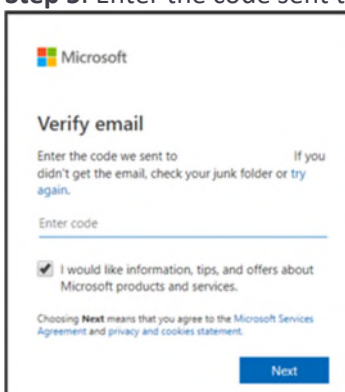
**Step 3.** Enter the password you would like to use and click *Next*.



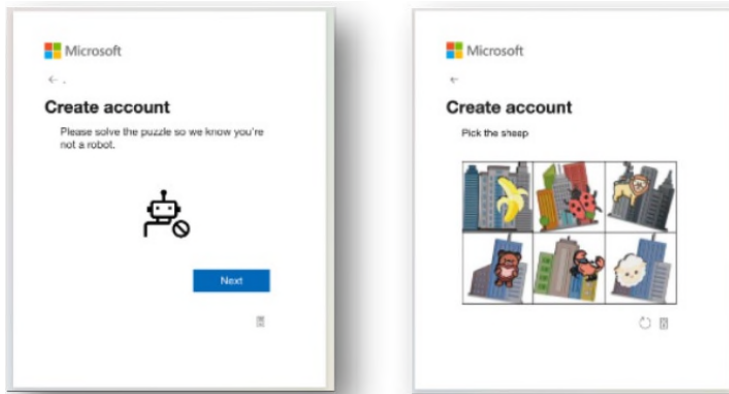
**Step 4.** Provide Country/Region, Birthdate and click *Next*.



**Step 5.** Enter the code sent to your email and click *Next*.

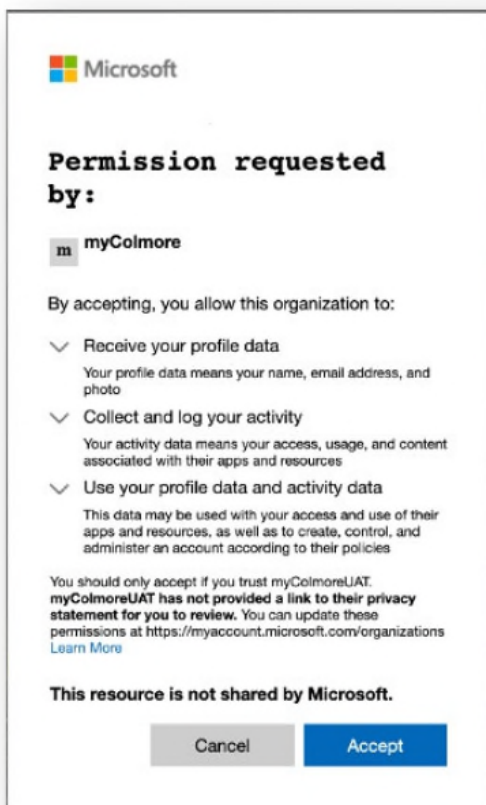


**Step 6.** Once the Create Account page opens, click *Next*, and solve the puzzle.



**Step 7.** Accept tenant permission by clicking *Accept*. If you are a new user of HELIOS you will need to select the 'I have read terms and conditions' checkbox and click *Accept*.

If you have logged into the previous version of HELIOS before, this step won't be necessary.

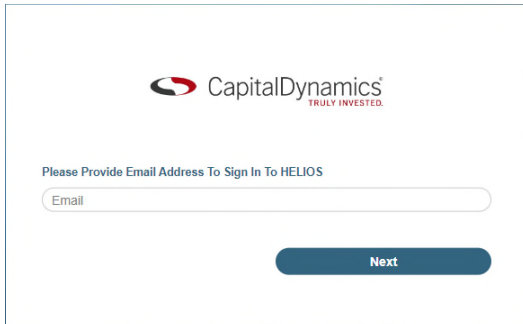


You will then be logged into HELIOS.

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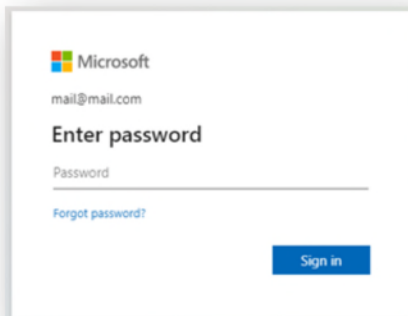
## 1.4 Accessing HELIOS if you have forgotten your password

If the email account you use with HELIOS is connected to a Microsoft Personal Account (for example, Office 365) you can retrieve or reset your password through Outlook online, or through the “Forgot password” link following the entry of your email address on the HELIOS front page:



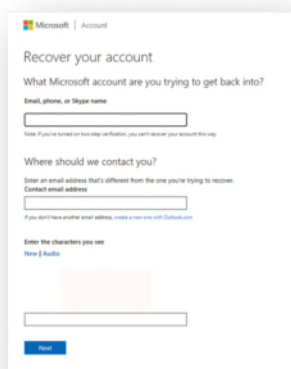
The image shows the CapitalDynamics HELIOS login page. At the top is the CapitalDynamics logo with the tagline 'TRULY INVESTED.'. Below the logo, the text reads 'Please Provide Email Address To Sign In To HELIOS'. There is a text input field labeled 'Email' and a blue 'Next' button.

At this point, you will likely be redirected to a password entry screen:

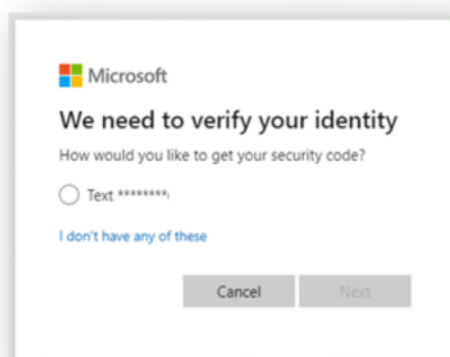


The image shows a Microsoft password entry screen. It features the Microsoft logo, the email address 'mail@mail.com', and the heading 'Enter password'. Below the heading is a password input field and a 'Forgot password?' link. A blue 'Sign in' button is located at the bottom right.

From here, click “Forgot password?” and you will be directed to password recovery screens. Follow the steps to recover/reset your password. This will be dependent on the settings applied by yourself, or your email administrator, upon setup of your email account.



The image shows a Microsoft account recovery screen. It asks 'What Microsoft account are you trying to get back into?' and provides input fields for 'Email, phone, or Skype name', 'Where should we contact you?' (with sub-fields for 'Enter an email address that's different from the one you're trying to recover' and 'Contact email address'), and 'Enter the characters you see' (with a 'New Audio' link). A blue 'Next' button is at the bottom.



The image shows a Microsoft identity verification screen. It asks 'How would you like to get your security code?' and has a radio button selected for 'Text \*\*\*\*\*'. There is a link 'I don't have any of these' and two buttons: 'Cancel' and 'Next'.

If your email domain is managed by your organization and is federated with Azure AD, your password will need to be recovered/reset in line with your organization’s policies and procedures. Please contact your network administrator if you are unsure of the steps required.

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## 2. For further information, please contact:

Capital Dynamics Client Relations Team

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