



work smarter, not harder

<http://www.doc-safe.co.uk/>

Client Help Notes August 2013

1. Forgotten password

Simply enter your email address into the email box at login and then click the link for forgotten password. An email will be sent including a link that can be used to update your password. If you do not receive this email please check your spam or junk folder. It is very important that you clear through this email as it will pave the way for all future DocSAFE notifications.

2. Home page view

Once you have logged into DocSAFE you will see two lists of documents: "Recently Added Documents" and "Documents Requiring Approval". These represent the most important and recent activity for you to deal with.

The right hand column "Recently Added Documents" displays the five most recent files that have been uploaded into your account along with the status information on the file. The left hand column "Documents Requiring Approval", and arguably the most important, displays the files that require your approval/electronic signature.

The three green coloured buttons at the top of the page are as follows:

- Upload – allows you to upload files into your account
- Folders – allows you to navigate all folders and files in your account
- Settings – allows you to change your account details including your name and password

On the top bar you can search for a file by name.

3. General

When navigating through the DocSAFE area of the website, for example where you go into: "Upload", "Folders" or "Settings", you must use the icons in the top left hand corner on the pale blue toolbar. Select "Dashboard" to return to the DocSAFE homepage and "Back" to return to the previous page. (You cannot use the back arrow on the browser for security reasons).

4. Viewing files

Simply click the file and the following screen will display a thumbnail image and all the relevant file information. Depending on the status of the file you can use one of the green buttons at the bottom to do the following:

- Download – this will allow you to open and/or save the file.
- Preview – this will open the file on screen for immediate viewing (to return to the previous page you must click on the white area around the outside of the preview item).
- Delete – this may or may not be visible depending on the permission rights of the file.
- Certificate - this will display the approval details if the file has been approved. Again, to return to the previous page you must click on the white area around the outside of the preview item.

5. Approving files

You will receive an email informing you when new documents have been uploaded for your approval.

To approve a file you will need to go through the following sequence of events:

- Click the file name in the "Documents Requiring Approval" column on the DocSAFE homepage. Please note that this action can also be taken by clicking the name of any file requiring approval from anywhere within DocSAFE i.e. "Folder" view or "Recently Added Document" view.
- The onscreen instructions request that you must download the file before progressing.
- After using the "Download" button you will be given a new instruction to confirm approval. This requires you to click a small tick box.
- The approval button then becomes visible and then you can click it.
- Finally, you have the option of adding any commentary of your own before clicking confirm.
- The process is complete and the status of the file is now approved.

6. Uploading files

- By choosing the green "Upload" button on the home page you are able to upload single files into DocSAFE.
- Simply choose a file from the browse option ("Document to Upload") and then pick the destination for the file: "Destination Account" and the "Destination Folder."
- You will also have to notify someone that the file has been uploaded using "Upload Notification" with the option of adding a message in the notification email by using "Additional Message".
- You have a choice to "Overwrite Documents(s)" if they already exist in DocSAFE. Documents will only be overwritten if you put a tick in the small grey box next to the words "Yes, I want to overwrite existing documents(s)".
- Click "Start Upload" to complete the process.

7. Searching

There are two ways to find a file:

- A. Use the search box at the top of the DocSAFE pale blue dash-board to find a file by name.

- B. Use the “Folder” button and scroll through the available folders and sub-folders until you find the file you want. Each folder will display the number of documents contained within it and how many of these are unread.

8. Settings

The green “Settings” button on the home page allows you to update your name and your password.

Release notes

- *We recommend using the latest versions of all popular web browsers.*
- *DocSAFE will fully function on any device including mobile phone, tablet, PC and Mac.*
- *When using Internet Explorer we recommend using version 9 or above to gain the full DocSAFE user experience.*
- *DocSAFE is a fully secure and encrypted portal. The technical details can be viewed by clicking the “Connection Secure” message in the top left corner of the DocSAFE pale blue toolbar.*