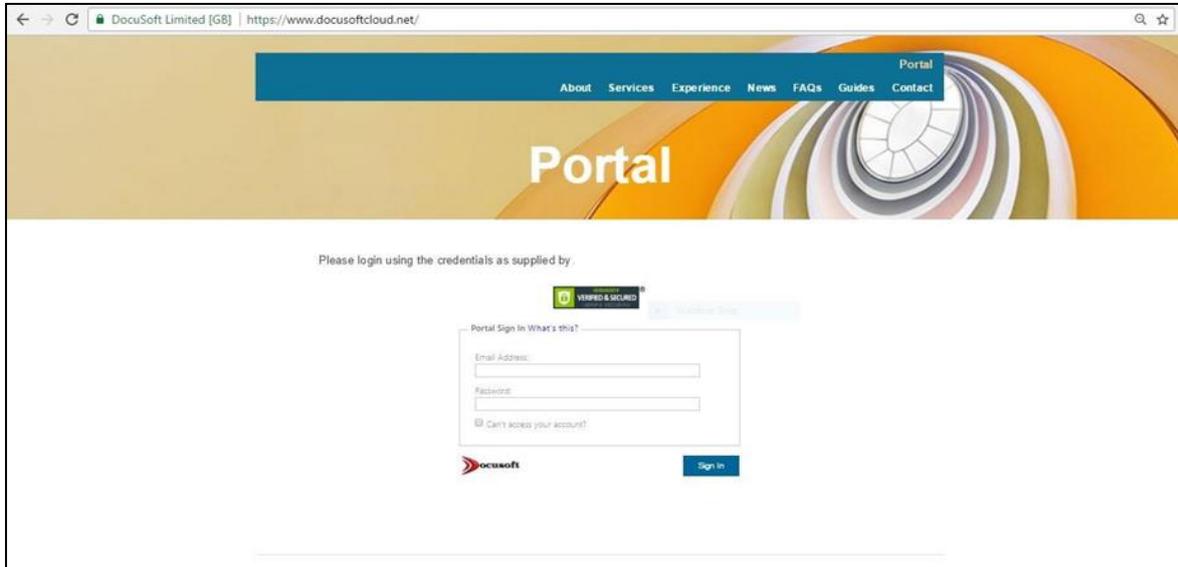




Portal End User Guide

2018

www.btpassoc.co.uk
btp@btpassoc.co.uk
0800 0439351



Contents

1 Overview	3
2 Your Profile	4
3 How to Read Messages	5
4 How to Approve Messages and Sign Attachments	5
5 How to Disapprove Attachments	7
6 How to Comment on Attachments	8
7 How to View and Print Attachments	9
8 How to Use the Flipbook Viewer	11
9 How to Upload Files and Send Messages	13
10 Viewing Sent Messages	15

Portal Web User Guide

1 Overview

The Menu Bar



Inbox: Select to view messages sent to your Portal account



Sent: View messages sent by you to your provider



My Profile: Your portal account settings



Upload: Upload documents and send messages with attachments



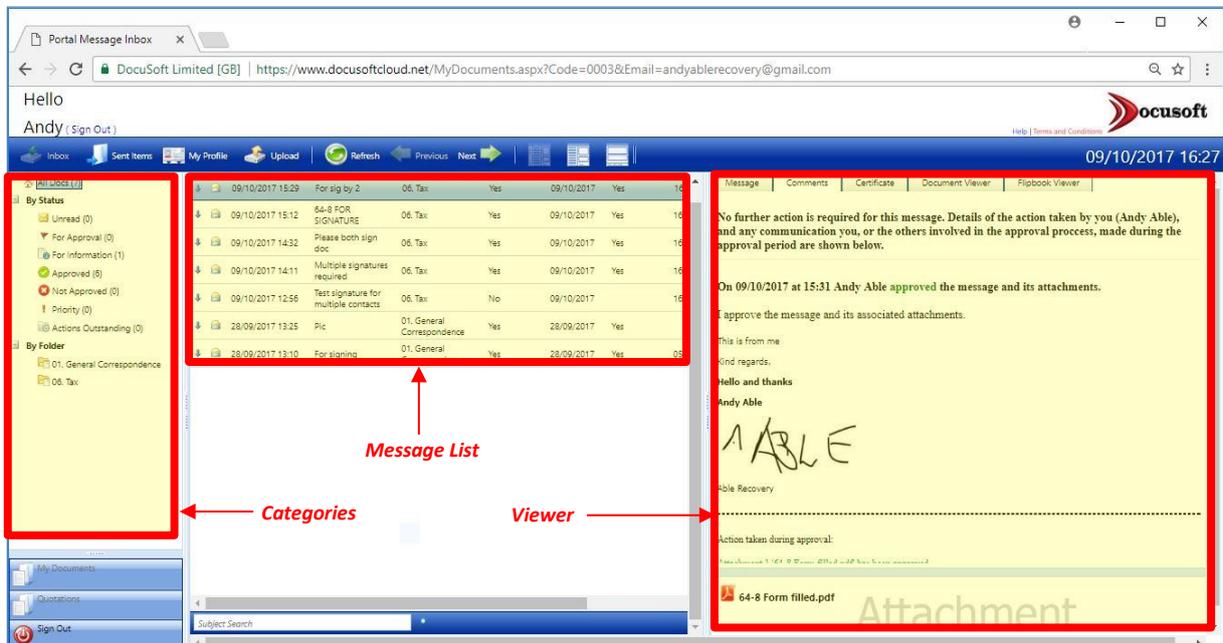
Refresh: Update live information



Previous and Next: Select next and previous message



Change Layout Options: Categories; Message list; Viewer

The screenshot shows the 'Portal Message Inbox' interface. A red box on the left highlights the 'Categories' section, which includes filters like 'By Status' (Unread, For Approval, For Information, Approved, Not Approved, Priority, Actions Outstanding) and 'By Folder' (01. General Correspondence, 06. Tax). A central red box highlights the 'Message List' table, which contains columns for date, subject, folder, status, and actions. A right-side red box highlights the 'Viewer' section, showing a message body with a signature 'Andy Able' and an attachment '64-8 Form filled.pdf'. Red arrows point from the labels 'Categories', 'Message List', and 'Viewer' to their respective sections in the screenshot.

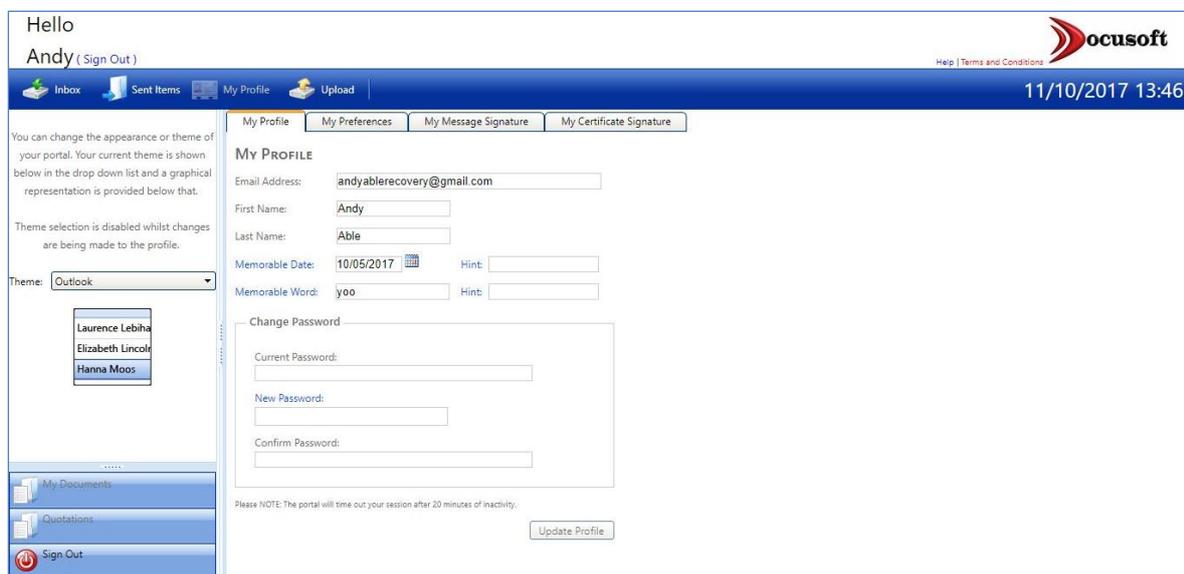
Portal Browser

2 Your Profile



When you log in to the Portal (for the first time only) you will be taken to the My Profile application, otherwise you can use this application to change/reset password, and to create preferences and signatures.

In the menu bar (see image below), select ‘My Profile’ and you will be presented with a number of tab options to set and change your Docusoft Portal profile.



Portal Browser

‘My Profile’ tab allows users to set memorable information that will be used as a hint if you need to reset your password. You can also change your password at any time.

‘My Preferences’ tab allows you to set the default for how you view messages when you log-in, i.e. you can set the default to just view the ‘For Approval’ messages.

‘My Message Signature’ tab allows you to set up the signature for any message you send.

‘My Certificate Signature’ allows you to upload or draw a signature that will be used for “Electronic Signature” of documents and in the Certificate used for approval.

3 How to Read Messages

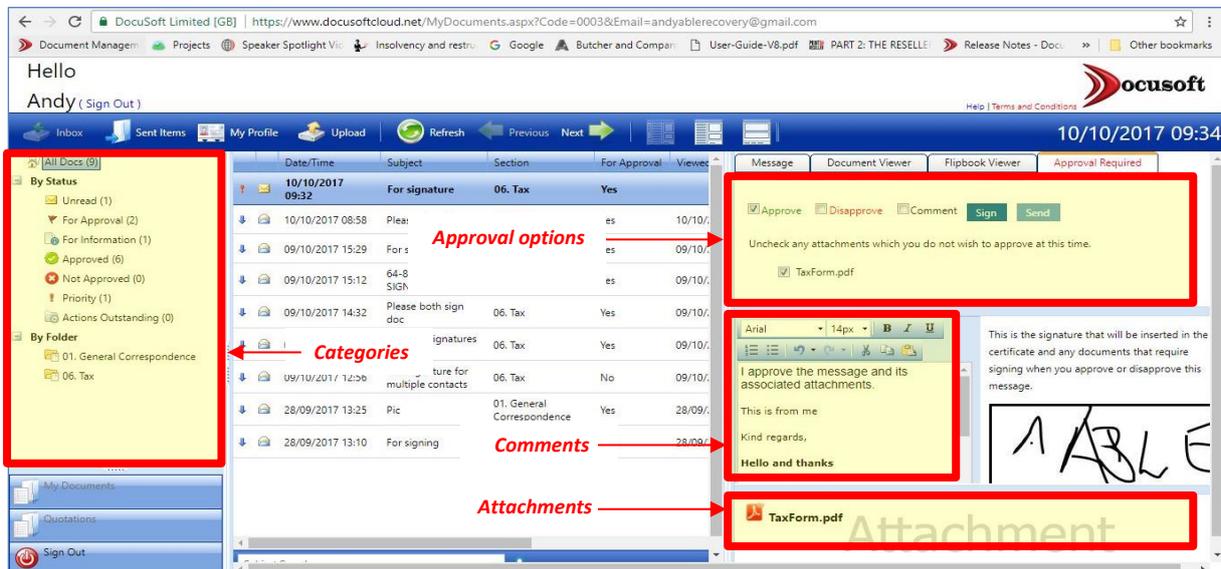
In the menu bar, select 'Inbox', select a message in the 'Message List', then in the 'Viewer' window select the message tab to read the message. Attachments are listed at the bottom of the 'Viewer' window.

Any attached document(s) can be viewed by selecting the desired attachment. The selected document will be made visible in the 'Document Viewer' tab. From the 'Document Viewer' a document can be printed or saved using the standard viewer functions supplied by the browser.

4 How to Approve Messages and Sign Attachments

Messages can be sent 'For Approval' or 'For Information'. Messages with attached documents that require approval can be either sent to you for your 'approval' only or can be sent for 'signature' and 'approval'.

Messages that have attachments that require your approval are identified easily.



Portal Web User Guide



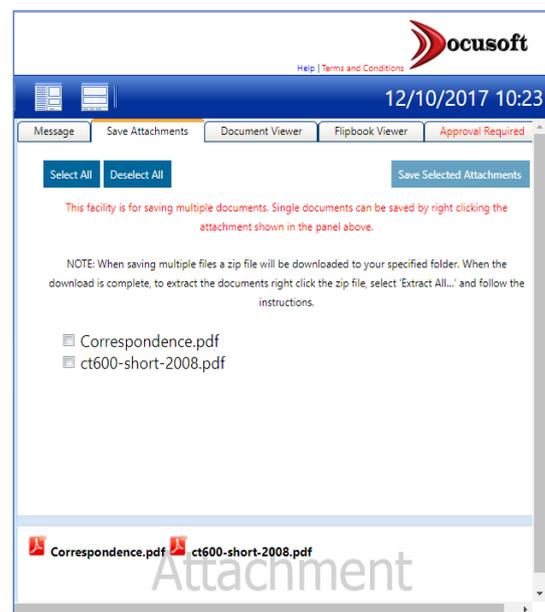
You can view all messages requiring approval by clicking on the 'For Approval' category.

In the 'Viewer' window, the 'For Approval' tab will flash when a message requires approval.

From the 'Viewer' window you can view the message, the attached document(s) and the level of approval required.

When more than one document is attached, you can also choose to save and download files.

In the 'Viewer' window, click on the tab marked 'Approval Required', above the message. You are presented with a number of check box options: 'Approve', 'Disapprove', 'Comment', 'Sign' (if signature is required) and Send.



To 'Approve' a message simply click on the 'Send' button. Only the 'Send' button is displayed when no signature is required.

To 'Sign' a message, click on the 'Sign' button. Your Portal provider will determine where your signature is placed in the document and how many times it may be required. Once you have signed a document, and you are happy (you can review the document before it is 'Sent'), you can click on the 'Send' button and the document is signed and approved. You can review your signed document after it has been sent by accessing the message from the 'Approved' list and clicking on the 'Document Viewer' tab. And you can download a copy of your signed document at any time.

When sending a document/message, a number of activities will be initiated automatically including:

Portal Web User Guide

- A standard comment (“I approve the message and its associated attachments”) will be added to the comment (which can be edited before sending);
- Your electronic signature is embedded in the PDF and is certified (signing only).
- An email notification with the certificate attached will be sent to you;
- An email notification with the certificate attached will be sent to the Portal provider;
- The message will be marked as ‘approved’ and will no longer appear in the list of messages ‘For Approval’.

5 How to Disapprove Attachments

When you have viewed a message and its attachment(s) and decided it should be rejected, then use the Disapprove selection option provided.

To ‘Disapprove’ a message check the ‘Disapprove’ box and click on the ‘Send’ button.



A number of activities will be initiated automatically including:

- A standard comment (“I disapprove the message and its associated attachments”) will be added to the comment;
- A certificate will be generated;
- An email notification with the certificate attached will be sent to you;
- An email notification with the certificate attached will be sent to the Portal Provider;
- The message will be marked as ‘Disapproved’ and will no longer appear in the list of messages ‘For Approval’.

It is also possible to partially approve a message that has multiple attachments.

To ‘Partial Approval’ a message (applies to messages with multiple attachments only), check the ‘Disapprove’ box, check the box(es) for the attachments that you approve and leave the attachments that are not approved unchecked and click on the ‘Send’ button.

After Approval, a number of activities will be initiated automatically including:

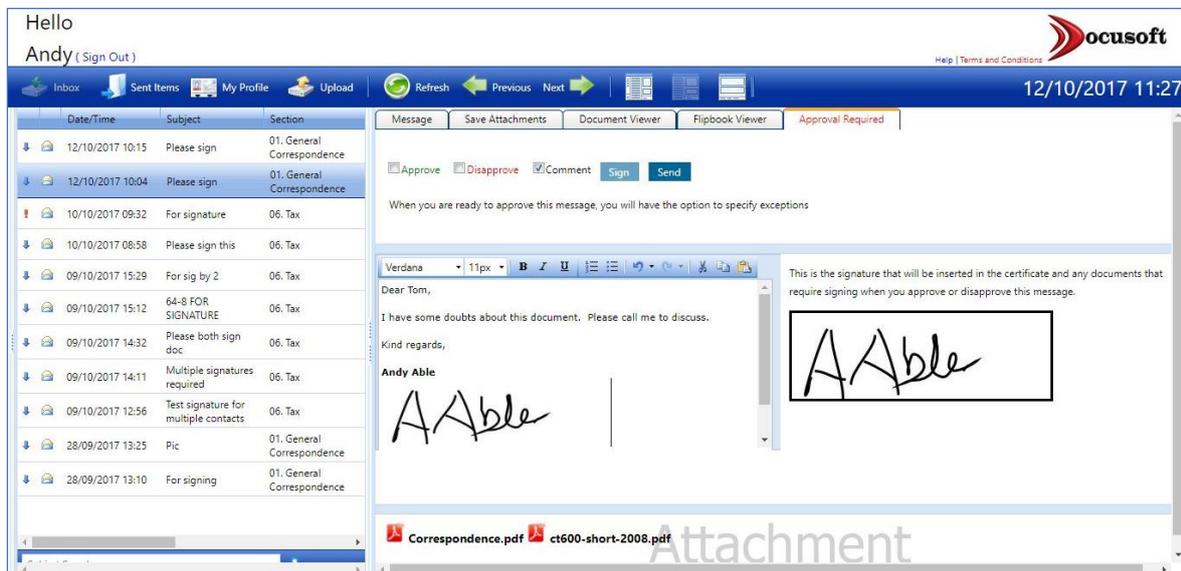
- A standard comment (i.e. “I approve the message and 2 of its 3 associated attachments.”) will be added to the comment;
- A certificate will be generated;

Portal Web User Guide

- An email notification with the certificate attached will be sent to you;
- An email notification with the certificate attached will be sent to the Portal Provider;
- The message will be marked as 'Approved' and will no longer appear in the list of messages 'For Approval'.

6 How to Comment on Messages and Attachments

You can add and send comments about messages and attachments easily by using the 'Comment' function provided. You can amend standard comments for approve and disapprove at any time in the 'Comment' window. You can send comments about a related message or attachment without either, approving or disapproving.



The screenshot shows the portal interface with a message list on the left and a detailed view of a message on the right. The message list includes columns for Date/Time, Subject, and Section. The detailed view shows the message content, a signature, and attachments.

Date/Time	Subject	Section
12/10/2017 10:15	Please sign	01. General Correspondence
12/10/2017 10:04	Please sign	01. General Correspondence
10/10/2017 09:32	For signature	06. Tax
10/10/2017 08:58	Please sign this	06. Tax
09/10/2017 15:29	For sig by 2	06. Tax
09/10/2017 15:12	64-8 FOR SIGNATURE	06. Tax
09/10/2017 14:32	Please both sign doc	06. Tax
09/10/2017 14:11	Multiple signatures required	06. Tax
09/10/2017 12:56	Test signature for multiple contacts	06. Tax
28/09/2017 13:25	Pic	01. General Correspondence
28/09/2017 13:10	For signing	01. General Correspondence

The detailed view of the message shows the following content:

Message | Save Attachments | Document Viewer | Flipbook Viewer | Approval Required

Approve Disapprove Comment

When you are ready to approve this message, you will have the option to specify exceptions

Verdana 11px **B** *I* U [Rich Text Editor Icons]

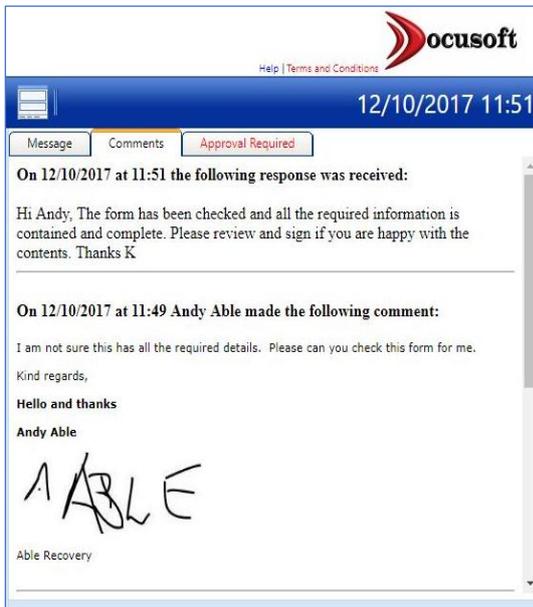
This is the signature that will be inserted in the certificate and any documents that require signing when you approve or disapprove this message.

Dear Tom,
I have some doubts about this document. Please call me to discuss.
Kind regards,
Andy Able

Attachments: Correspondence.pdf, ct600-short-2008.pdf

Comment on Attachments

Portal Web User Guide



When you wish to make a comment only, check the 'Comment' box, and type your comments in the message window and then click on the 'Send' button.

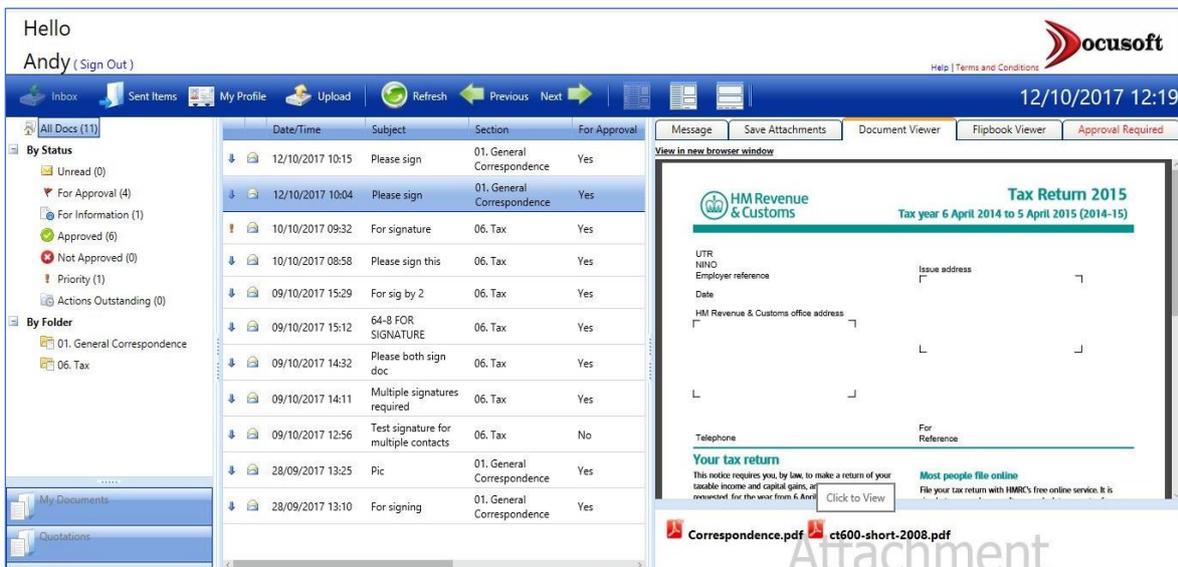
The intended recipient at the Portal provider will receive an email notification confirming a comment has been added to the message.

If the recipient from the Portal provider makes a further comment in response, then you will also receive an email notification confirming a comment has been added to the message and the new (and all previous) comments will be available in the 'Comments' tab.

7 How to View and Print

Attachments

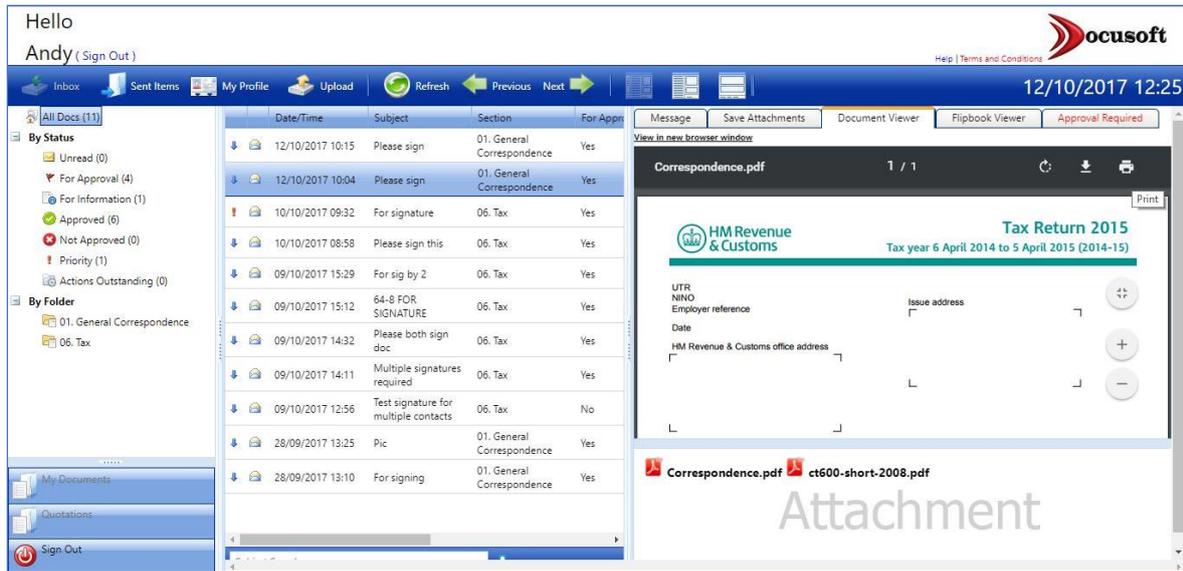
Attachments are located at the bottom of the 'Viewer' window (right-hand panel), highlighted as 'Attachments'.



Viewing Attachments

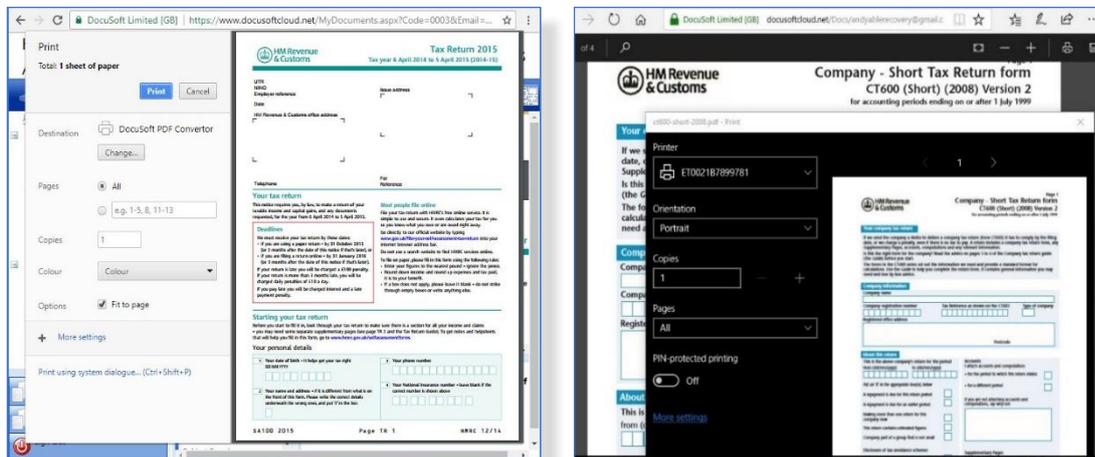
Attachments are clearly labelled. You can view any attachment by clicking on it. The attachment will be displayed in the 'Document Viewer' tab.

Portal Web User Guide



Print Attachments

From the viewer, attachments can be printed and/or downloaded. The web browser application you are using will determine how you can review, download or print documents. Where there are multiple documents, an additional download feature is provided to improve download speed by saving attachments at the same time.



Print Attachments using your Web Browser

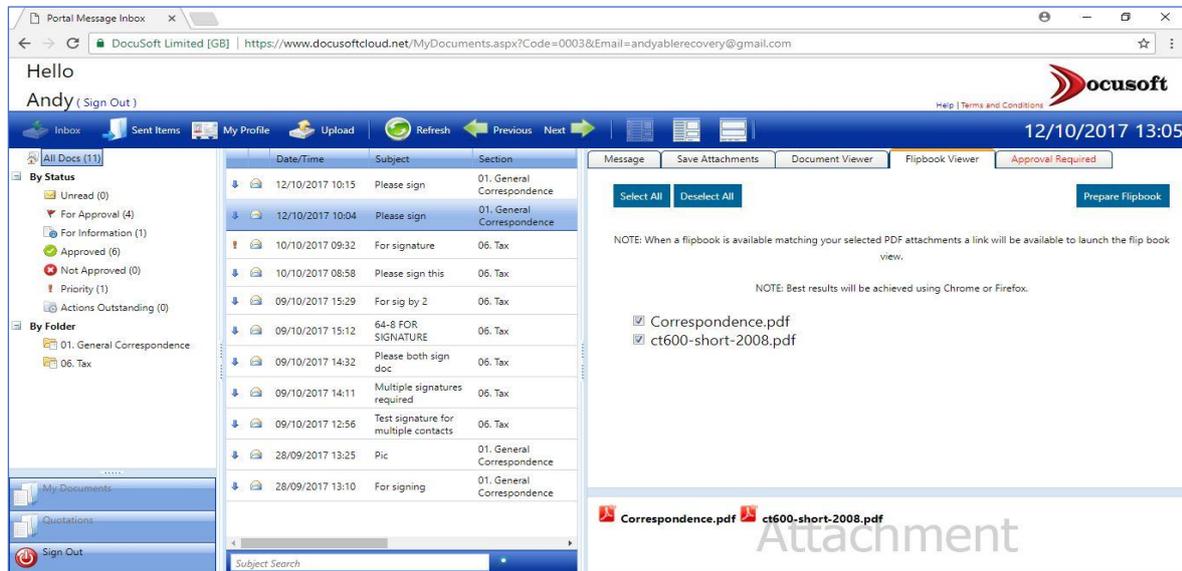
8 How to Use the Flipbook Viewer

When there are a number of documents that need to be reviewed, the Flipbook Viewer is provided as an alternative viewer. One or more PDFs can be merged and presented as an on-line book to flip through.

Portal Web User Guide

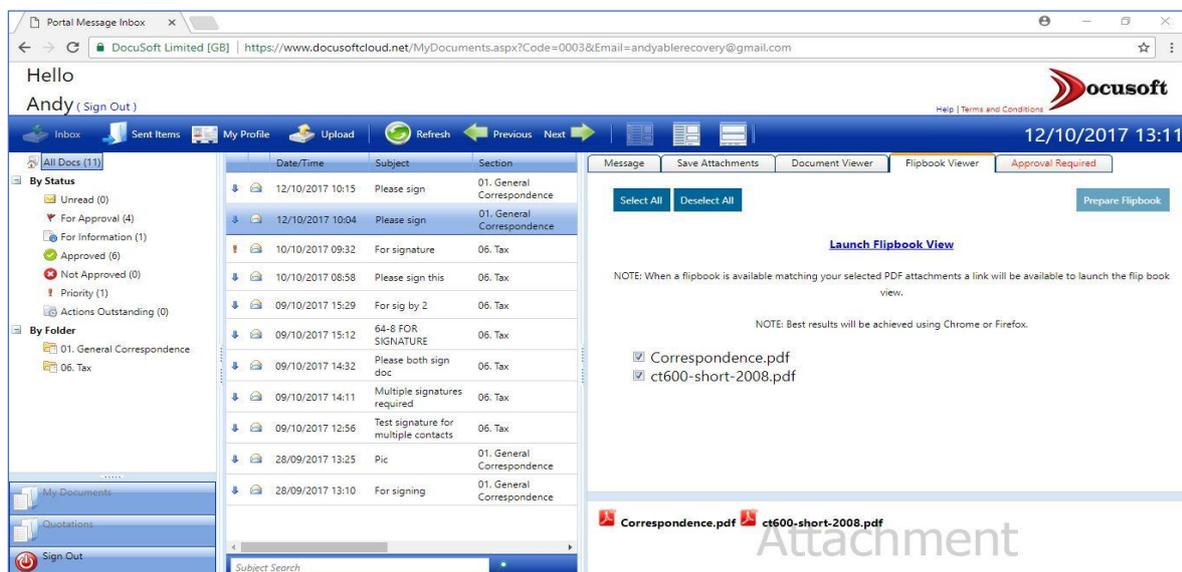
To create a Flipbook View:

- Choose the 'Flipbook Viewer' tab in the 'Viewer' window;
- Click the 'Prepare the Flipbook' button;



Preparing Flipbook Viewer

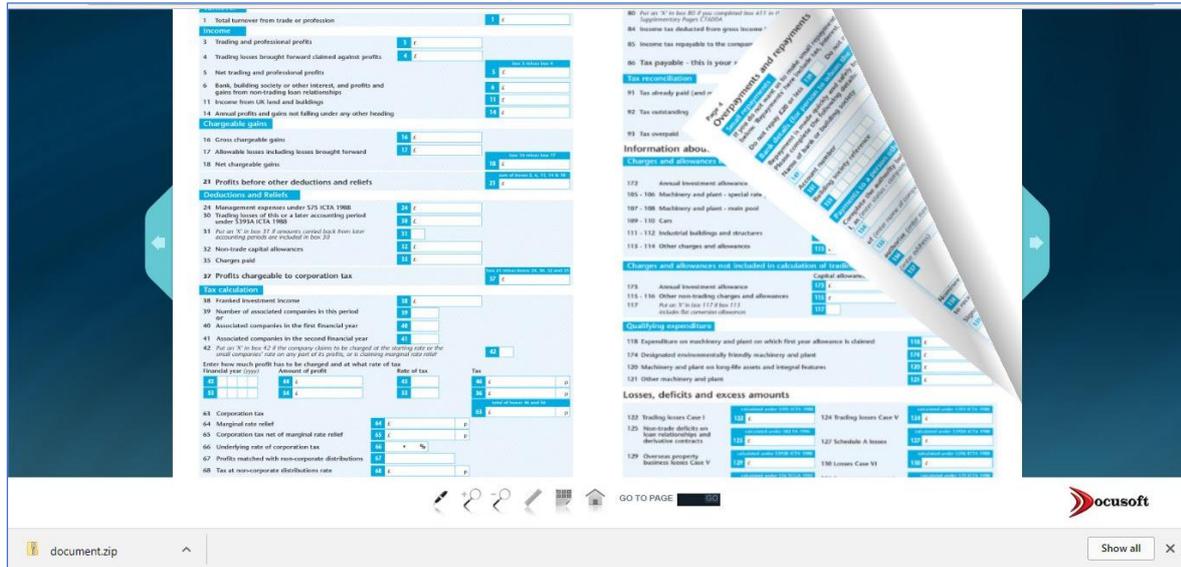
Once the Flipbook has been created choose the 'Launch Flipbook View' option.



Launching Flipbook Viewer

After clicking on the launch button, your selected (or merged) PDF document will be displayed in a Flipbook (Read only) viewer.

Portal Web User Guide

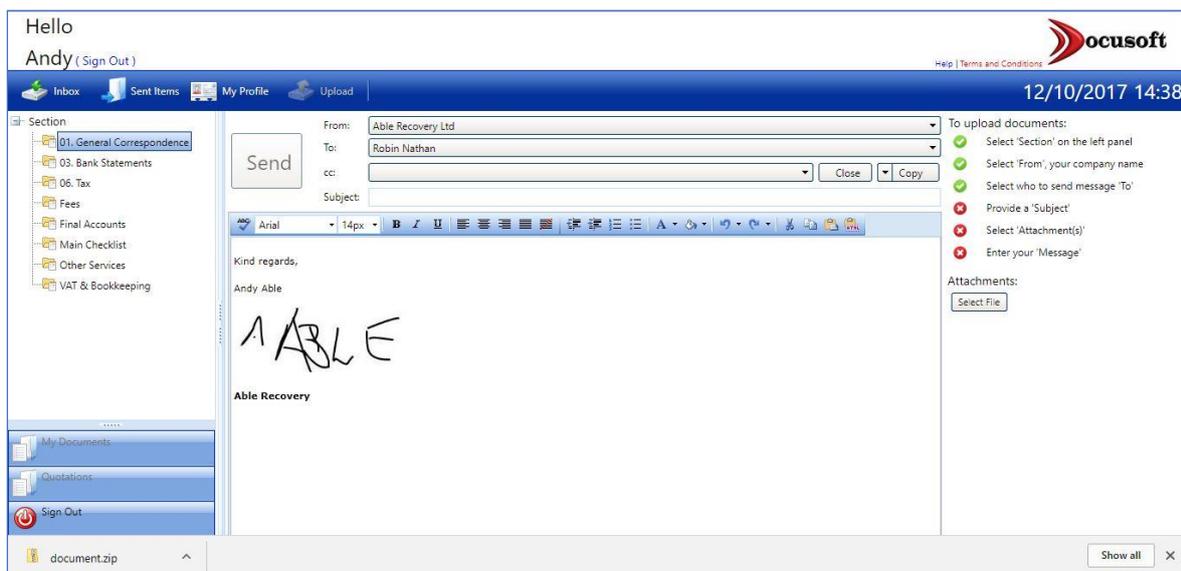


The Flipbook Viewer

Pages can be scrolled through using the page controls on either side of the attachment and pages can be turned by clicking on the corner of a page and then dragging it.

9 How to Upload Files

To upload files to your Portal provider, select 'Upload' from the main Portal menu.



Upload Documents and Send Messages

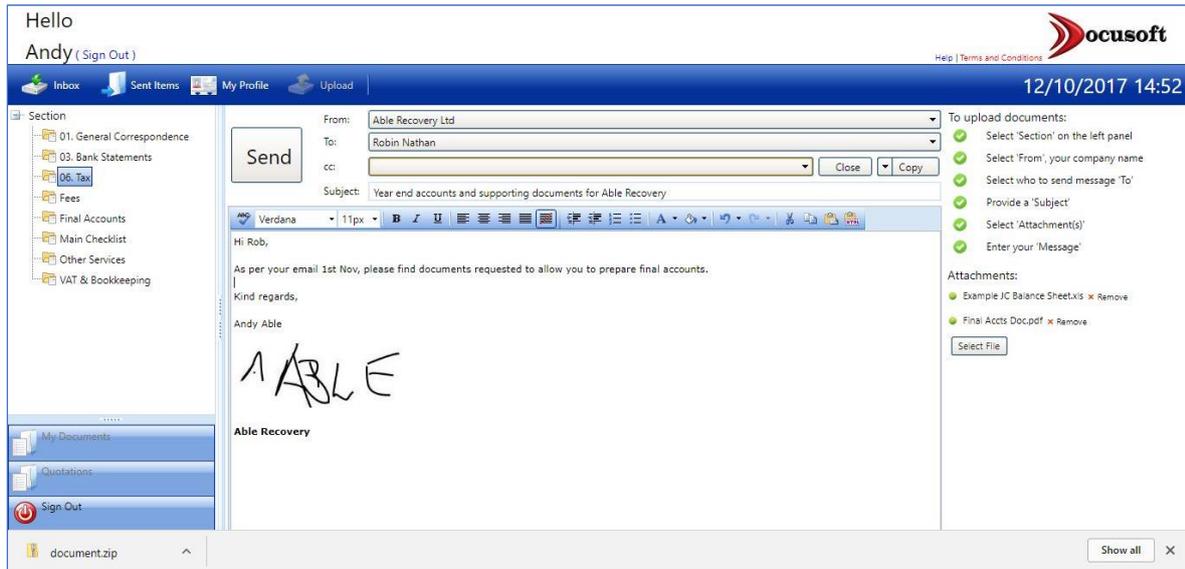
The use of this screen has been designed to feel like you are creating an email. The right-hand column provides easy step-by-step instructions, and each step must be completed. As each step is completed,  red crosses turn to  green ticks.

To upload documents:

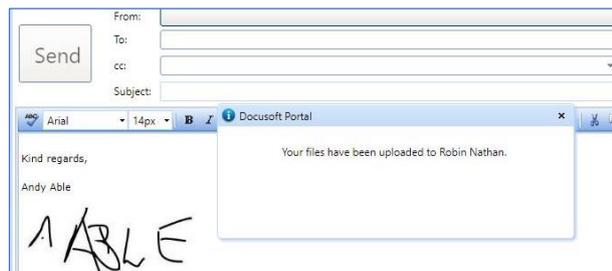
-  Select 'Section' on the left panel
-  Select 'From', your company name
-  Select who to send message 'To'
-  Provide a 'Subject'
-  Select 'Attachment(s)'
-  Enter your 'Message'

- Section:** Select the '*Section*' category in the left-hand pane that your uploaded message and documents relate to.
- From:** The 'From' label will be pre-populated if the user only has 1 company (otherwise a pulldown list will be presented to allow the user to select his company of choice). This will provide additional information to the Portal provider to know which company the files relate to – in addition the 'To' label will be pre-populated, based on the value in the 'From' field.
- To:** Pre-populated from the 'From' field.
- Subject:** Add the subject title of the message being sent.
- Attachments:** Click on the 'Select File' button in the right-hand column. You will be presented with a browser window in which you can navigate and select the required files. Multiple files can be selected for upload.
- Message:** Add your message in the 'Message' window. If you have included a signature in your 'Profile' this will be included in the message automatically, but can be over-written if required.

Once, and only when, there is a set of  green ticks in the right-hand column, can the message be sent, by clicking on the 'Send' button.



When the message is sent, the Message Screen will be cleared and you will receive confirmation that your message has been sent.

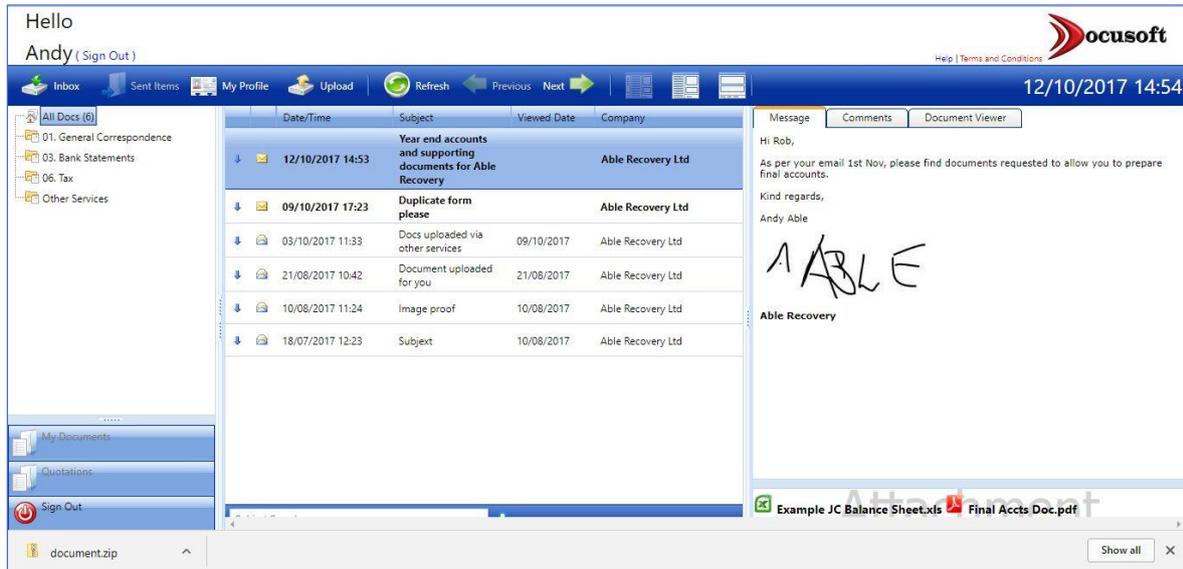


10 Viewing Sent Messages

Select the 'Sent Items' in the main menu.

Messages in bold are denoted as unread. A message will stay as 'Unread' until the recipient has opened the message, and then additionally a 'Viewed Date' will be displayed. Please note this feature may be disabled by the Portal provider. In this instance, the message will be shown as being read immediately.

Portal Web User Guide



End

Orbit Business Centre
Rhydycar
Merthyr Tydfil
CF48 1DL
United Kingdom

Tel: 0800 0439351

www.btpassoc.co.uk