

docmoto



DocMoto
Secure Sharing Portal

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Introduction:

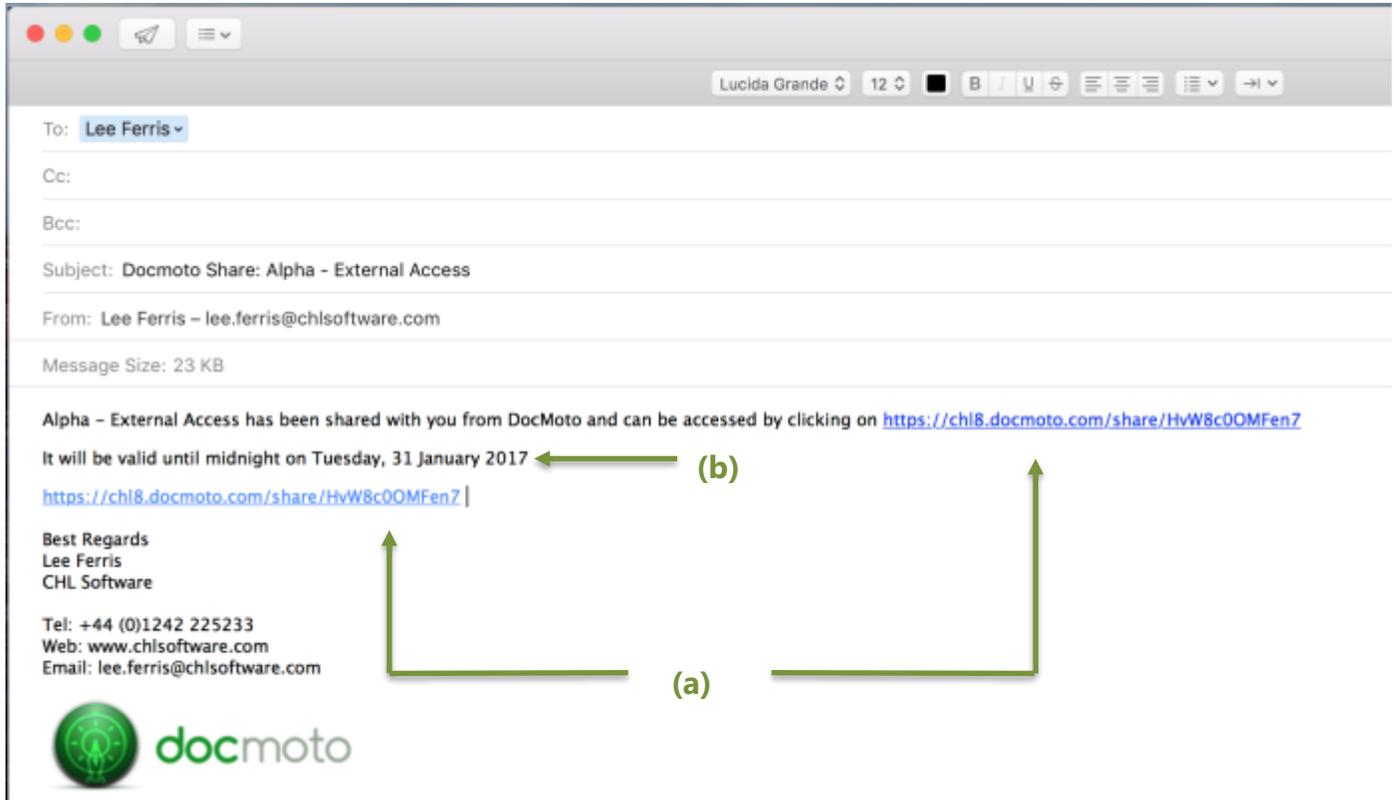
DocMoto has the ability to share files securely and simply with third parties.

This document is designed to illustrate to third parties how to use the DocMoto Secure Sharing Portal.

Receiving the share details

Third parties will receive the share details either via email or instant message.

Fig. Via Email



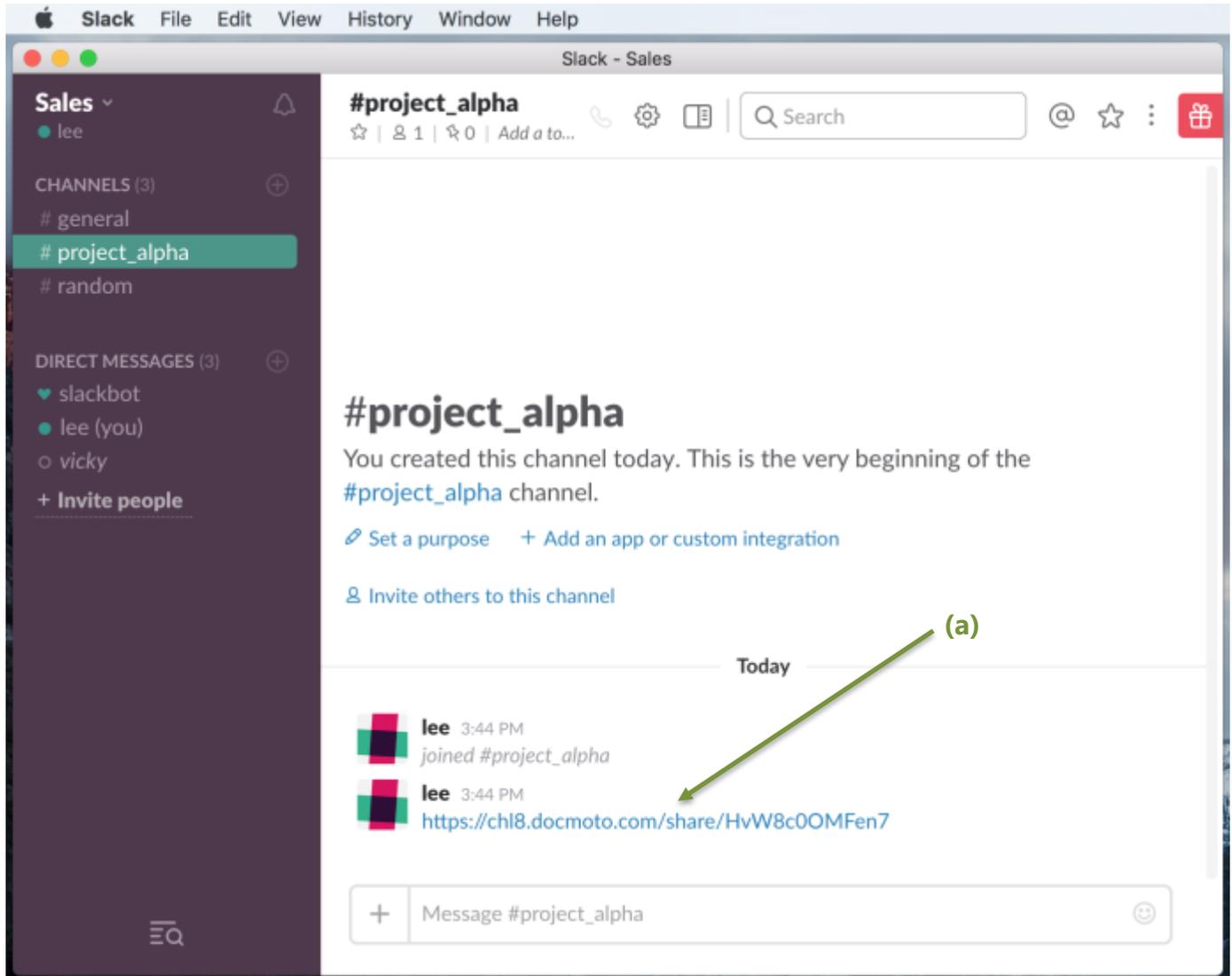
(a) Hyperlink for sharing portal.

(b) Expiration date of the share.

On receipt of the email – click on the hyperlink and the DocMoto Secure Sharing Portal will open via the default web browser (Firefox, Safari, Chrome, etc). Please refer to [DocMoto Secure Sharing Portal](#).

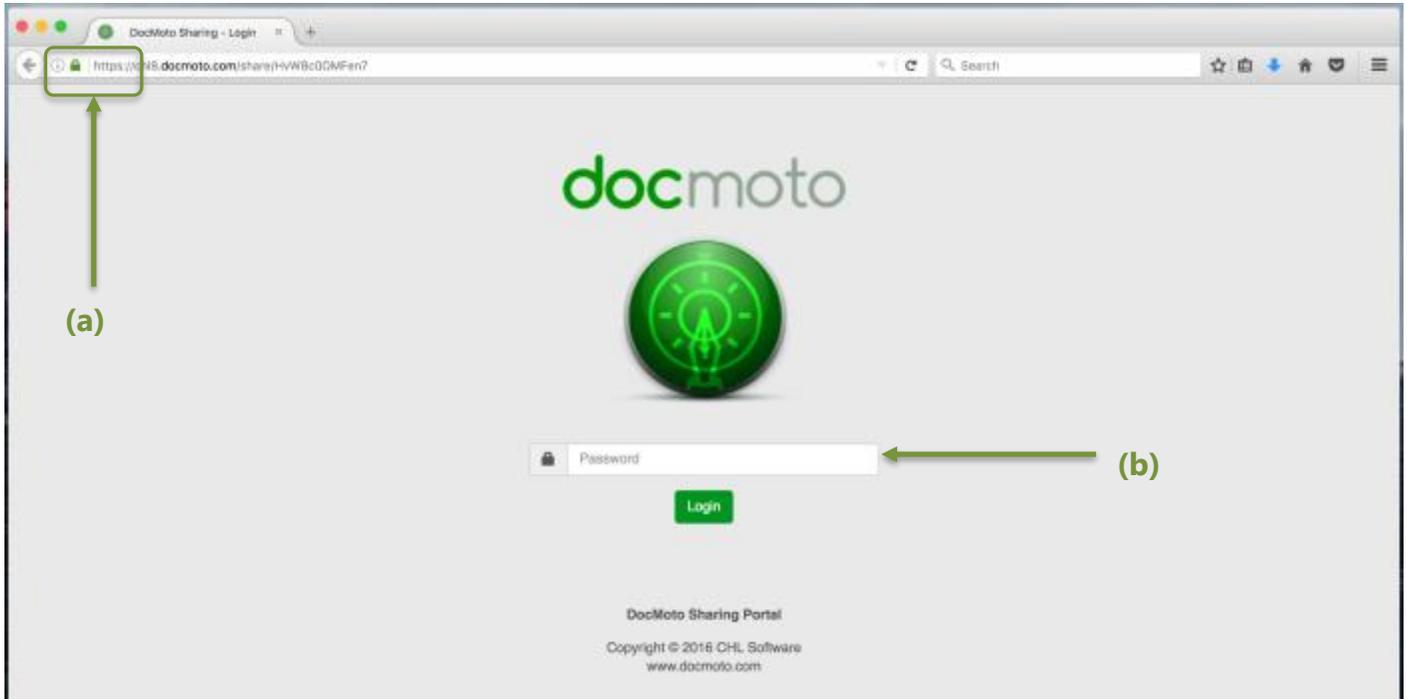
Fig. Via Instant Message

Note: This example illustrates receiving the share details via an instant message through the application “**Slack**”. Of course, it is possible to use other message services such as Apple’s Message service, Yamma, etc.



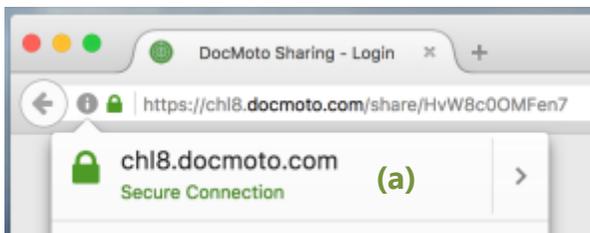
On receipt of the instant message – click on the hyperlink and the DocMoto Secure Sharing Portal will open via the default web browser (Firefox, Safari, Chrome, etc). Please refer to [DocMoto Secure Sharing Portal](#).

DocMoto Secure Sharing Portal



The DocMoto Secure Sharing Portal will be presented within the default web browser as shown above.

- (a) https – secure channel ensuring 256-bit encryption on all communications.
- (b) Password – authentication method.

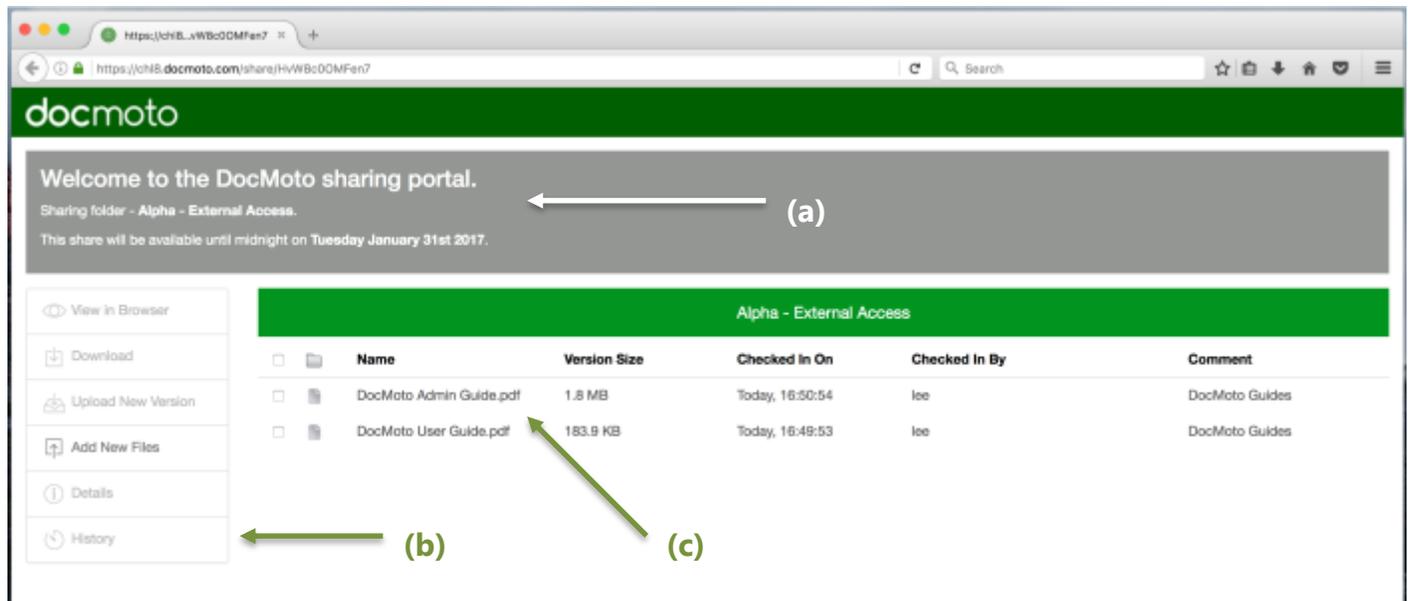


Note: Whether authentication is required by the third party is set by the originator of the share.

If authentication is required - insert the password supplied and select the **“Login”** button.

The next section details the available functions.

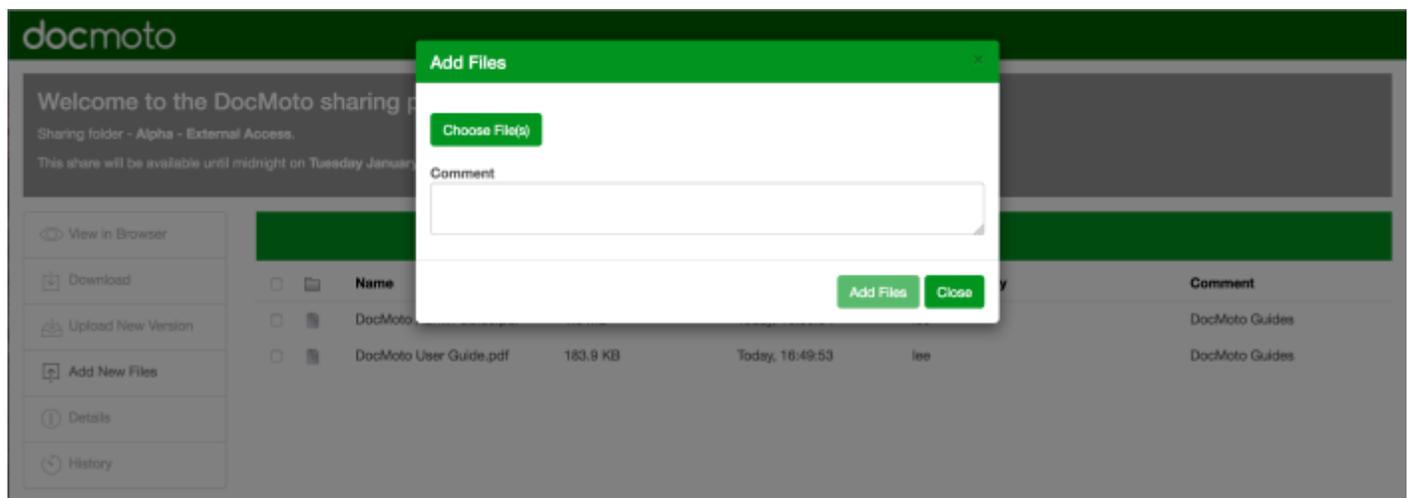
Welcome Screen



- (a) Welcome Message - sharing details such as name of the share and expiration date.
- (b) Function Toolbar – the functions available will depend on the originator of the share.
- (c) Contents – the content of the folder being shared (in this example two pdf guides).

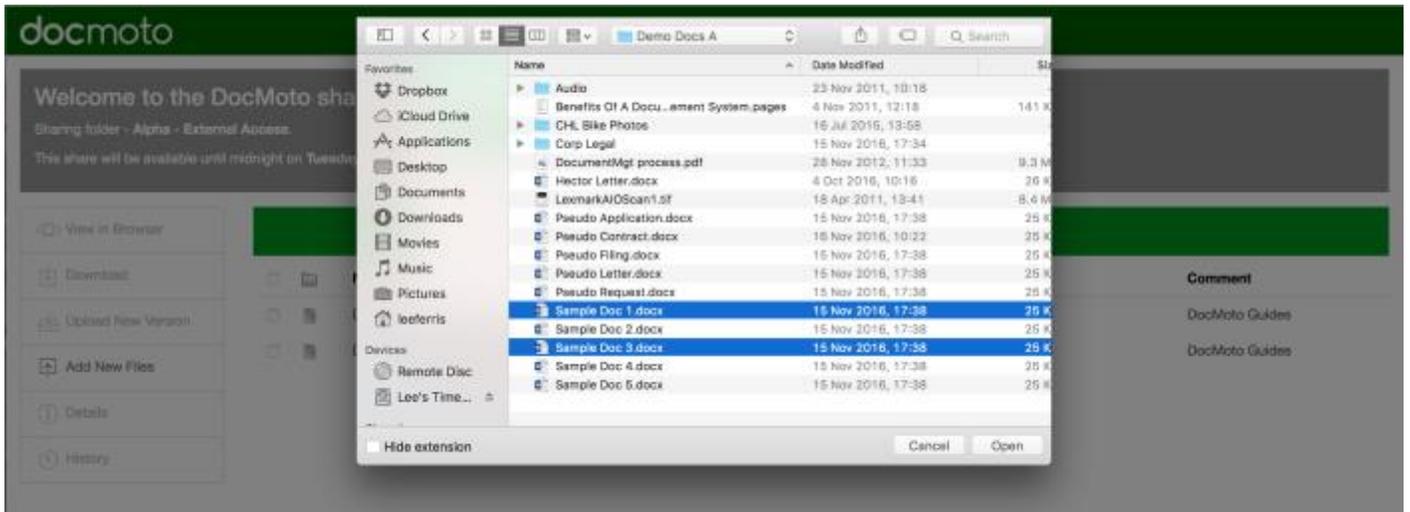
Adding a New File

1. Select the **“Add New Files”** menu option. A dialog is presented to enable the user to choose a file as shown below.

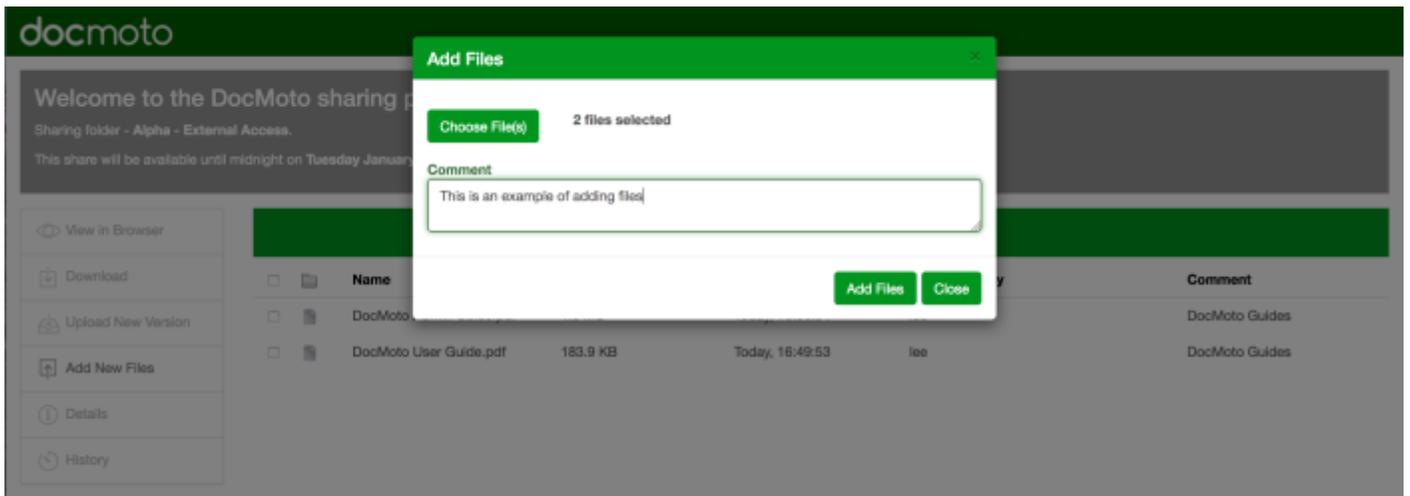


2. Select the **“Choose File(s)”** button. A dialog is presented to enable the user to browse anywhere on their computer (local or network) to locate the file(s) to upload. The look of the dialog will be dependent on the operating system – i.e. a **“Finder”** type dialog on MacOS or

an **“Explorer”** type dialog on Windows. In this example a **“Finder”** type window as shown below.



3. Select the file(s) to upload and subsequently the **“Open”** button.
4. Add any comments prior to upload and select the **“Add”** button to confirm. As shown below.



5. The **“Add Files”** dialog will disappear once the upload is successful with any comments applied. As shown below (files highlighted in green box).

Welcome to the DocMoto sharing portal.

Sharing folder - Alpha - External Access.

This share will be available until midnight on Tuesday January 31st 2017.

<ul style="list-style-type: none"> View in Browser Download Upload New Version Add New Files Details History 	<p style="text-align: center;">Alpha - External Access</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Name</th> <th>Version Size</th> <th>Checked In On</th> <th>Checked In By</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>DocMoto Admin Guide.pdf</td> <td>1.8 MB</td> <td>Tue Jan 3 16:50:54 2017</td> <td>lee</td> <td>DocMoto Guides</td> </tr> <tr> <td><input type="checkbox"/></td> <td>DocMoto User Guide.pdf</td> <td>183.9 KB</td> <td>Tue Jan 3 16:49:53 2017</td> <td>lee</td> <td>DocMoto Guides</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Sample Doc 1.docx</td> <td>24.7 KB</td> <td>Tue Jan 3 17:41:30 2017</td> <td>lee</td> <td>This is an example of adding files</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Sample Doc 3.docx</td> <td>24.7 KB</td> <td>Tue Jan 3 17:41:33 2017</td> <td>lee</td> <td>This is an example of adding files</td> </tr> </tbody> </table>	<input type="checkbox"/>	Name	Version Size	Checked In On	Checked In By	Comment	<input type="checkbox"/>	DocMoto Admin Guide.pdf	1.8 MB	Tue Jan 3 16:50:54 2017	lee	DocMoto Guides	<input type="checkbox"/>	DocMoto User Guide.pdf	183.9 KB	Tue Jan 3 16:49:53 2017	lee	DocMoto Guides	<input type="checkbox"/>	Sample Doc 1.docx	24.7 KB	Tue Jan 3 17:41:30 2017	lee	This is an example of adding files	<input type="checkbox"/>	Sample Doc 3.docx	24.7 KB	Tue Jan 3 17:41:33 2017	lee	This is an example of adding files
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View in Browser

Some file types can be viewed in a web browser such as pdfs or images. Some files such as MS Office documents require a plugin. To view a file in the browser:

1. Select the file(s) to view – check box to the left of the file.
2. Select the **“View in Browser”** menu option.

If the file type can be viewed in the browser the DocMoto Secure Sharing portal will open a new tab displaying the file. If the file can NOT be viewed in the browser, the file will be downloaded to the default download area as designated by the browser.

Download

To download a file:

1. Select the file(s) to download – check box to the left of the file.
2. Select the **“Download”** menu option.

The browser will download the file(s) to the default download area as designated by the browser.

Details

The DocMoto system tracks all transactions and creates audit data against each file stored in the system. To check a files details:

1. Select the file – check box to the left of the file.
2. Select the **“Details”** menu option.

History

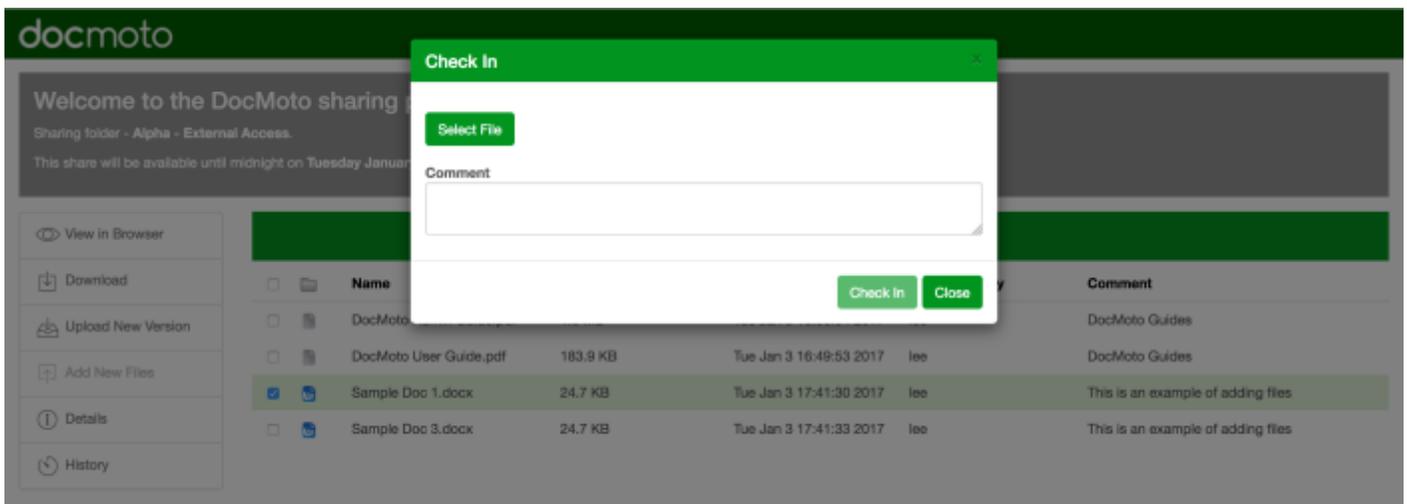
The DocMoto system includes version control ensuring all files are versioned after edits/amendments. To check a files history:

1. Select the file – check box to the left of the file.
2. Select the **“History”** menu option.

Upload New Version

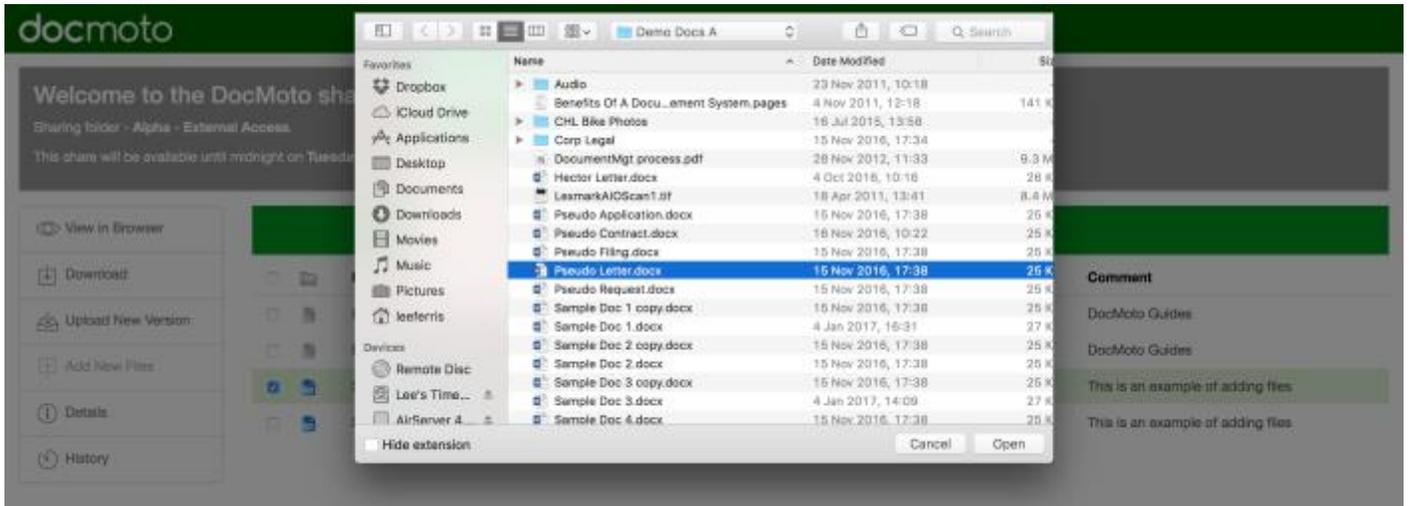
Leading on from the **“History”** section above, if permission is given, third parties can upload new versions to an existing document in the Secure Share Portal. To upload a new version:

1. Select the file to revise – check box to the left of the file.
2. Select the **“Upload New Version”** menu option.
3. A dialog is presented to enable the user to choose a file as shown below.

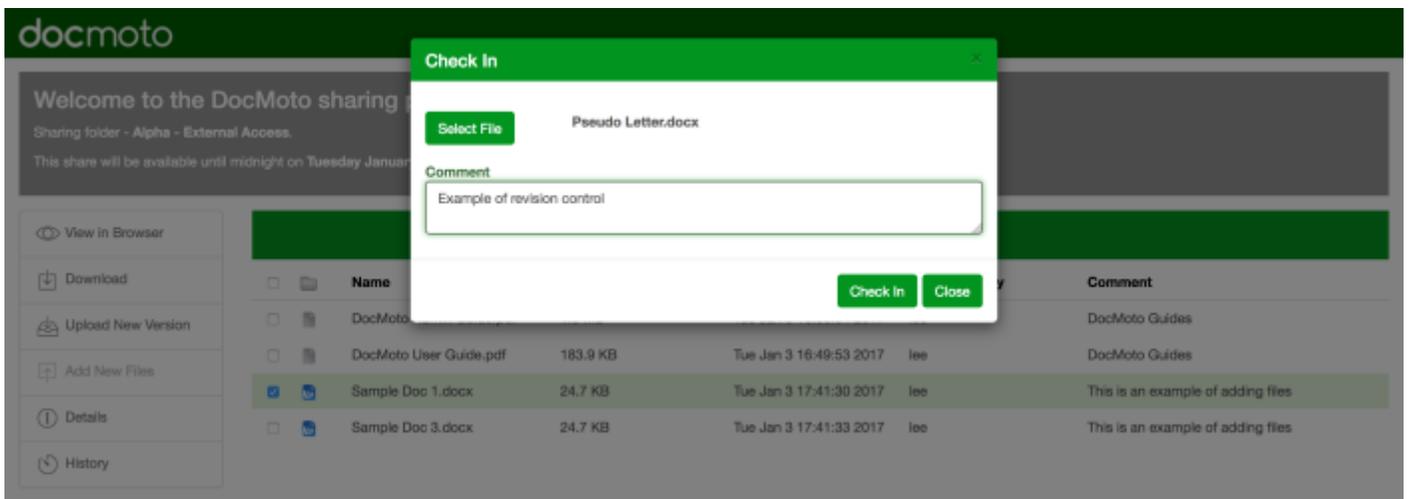


4. Select the **“Select File”** button. A dialog is presented to enable the user to browse anywhere on their computer to locate the file(s) to upload. The look of the dialog will be dependent on the operating system – i.e. a **“Finder”** type dialog on MacOS or an **“Explorer”** type dialog on Windows. In this example a **“Finder”** type window as shown below.

Note: DocMoto can revise a file stored in the system with a file with a different name to the original.



5. Select the file to revise and subsequently the **“Open”** button.
6. Add any comments prior to upload and select the **“Check In”** button to confirm. As shown below.



7. Select the **“Check In”** button to confirm.
8. The **“Check In”** dialog will disappear once the upload is successful with any comments applied. As shown below (file highlighted in green box).

Welcome to the DocMoto sharing portal.

Sharing folder - Alpha - External Access.

This share will be available until midnight on Tuesday January 31st 2017.

- View in Browser
- Download
- Upload New Version
- Add New Files
- Details
- History

Alpha - External Access

<input type="checkbox"/>		Name	Version Size	Checked in On	Checked in By	Comment
<input type="checkbox"/>		DocMoto Admin Guide.pdf	1.8 MB	Tue Jan 3 16:50:54 2017	lee	DocMoto Guides
<input type="checkbox"/>		DocMoto User Guide.pdf	183.9 KB	Tue Jan 3 16:48:53 2017	lee	DocMoto Guides
<input type="checkbox"/>		Sample Doc 1.docx	24.7 KB	Fri Jan 6 17:20:58 2017	lee	Example of revision control
<input type="checkbox"/>		Sample Doc 3.docx	24.7 KB	Tue Jan 3 17:41:33 2017	lee	This is an example of adding files