LLOYD'S

Lloyd's SecureShare

User Training Guide

Contents

Access instructions

Accessing Lloyd's SecureShare

Microsoft state that most SharePoint Online functionality is available via Internet Explorer, Edge, Chrome, Firefox and Safari browsers.

It is recommended that you use the most up-to-date browser version when using SecureShare or My Access.

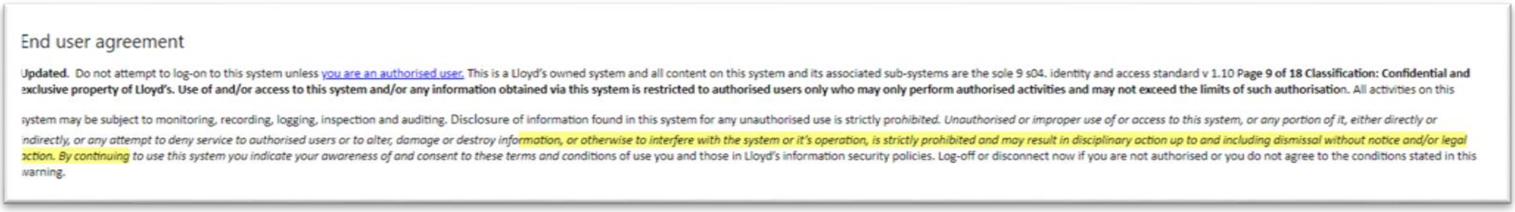
To be confirmed following service go-live

Initial steps

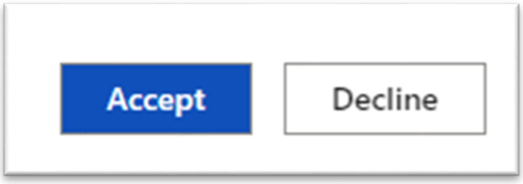
Accepting the End User Agreement

1. Upon the first time entering SecureShare, users will be requested to accept or decline the End User Agreement for the site.

   Users must fully review the End User Agreement before moving onto Step 2.
   Note: The screenshot below is not indicative of the full End User Agreement.



2. Once the full End User Agreement has been reviewed, users choose whether to **Accept** or **Deny** the End User Agreement using the buttons at the bottom of the page.



Site roles and responsibilities

The screenshot below indicates the responsibilities of both Site Owners and Devolved Administrators within the SecureShare platform.

Users of SecureShare must note that the platform should not be used as a location to store files permanently but instead as a mechanism to send and receive files.

Responsibilities of Site Owner

- Making sure it is being used as a sharing platform rather than storage
- Files are being moved to a permanent location as required
- Helping your team understand how everything works
- Liaising with Group Technology as the main point of contact
- Informing Group Technology if the site is no longer required

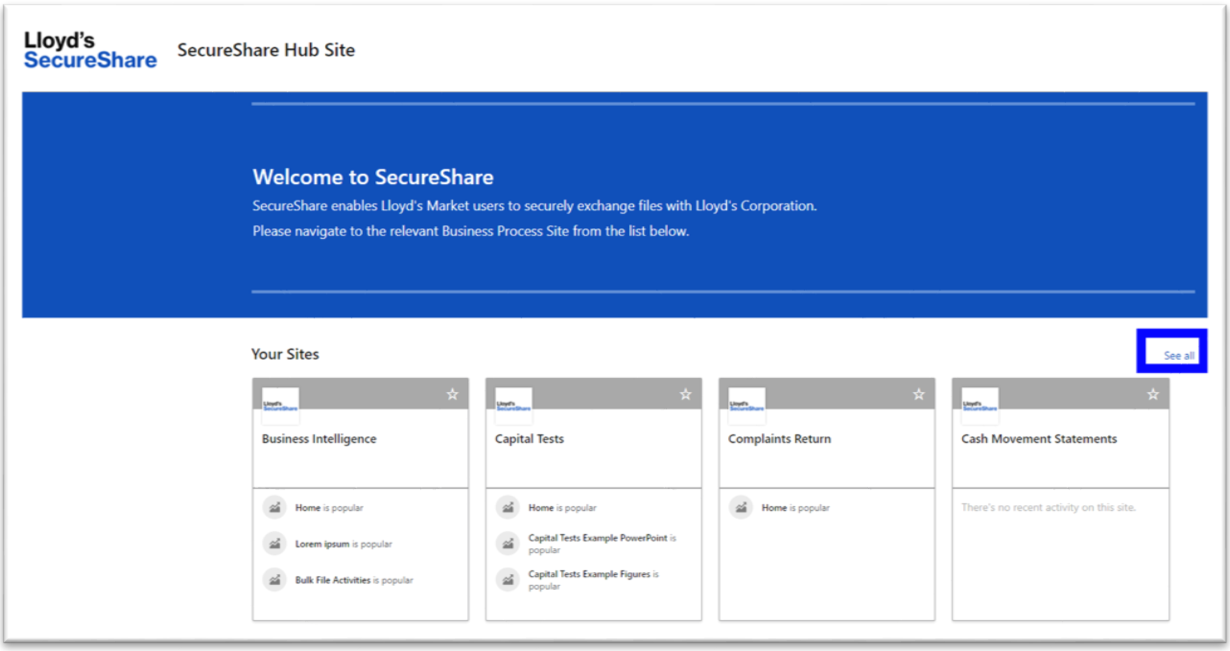
Responsibilities of Devolved Admin

- Accept SecureShare T&Cs on behalf of organisation
- Managing access requests from users in their organisations
- Conducting regular reviews of access groups and removing people who no longer need access

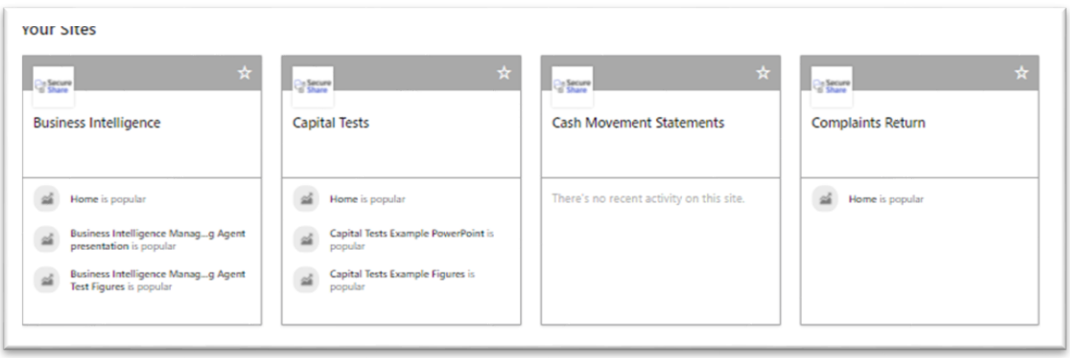
Essential site functionality

Navigating SecureShare

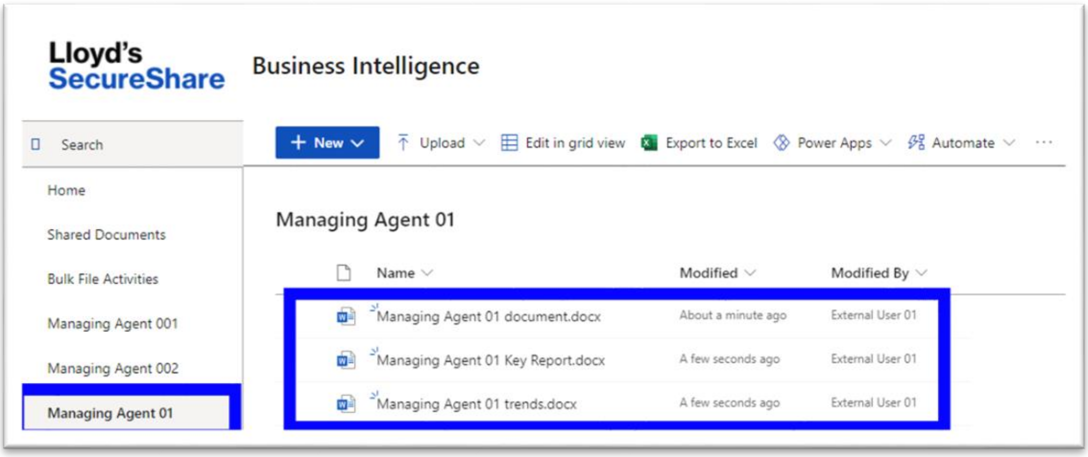
1. Once you have logged in to SecureShare, the **SecureShare Hub Site** shows all of **Your Sites** and your **Recent documents**, as shown below. The sites shown under **Your Sites** will be those you most frequently visit. To see all of the sites you have access to, select **See all.**



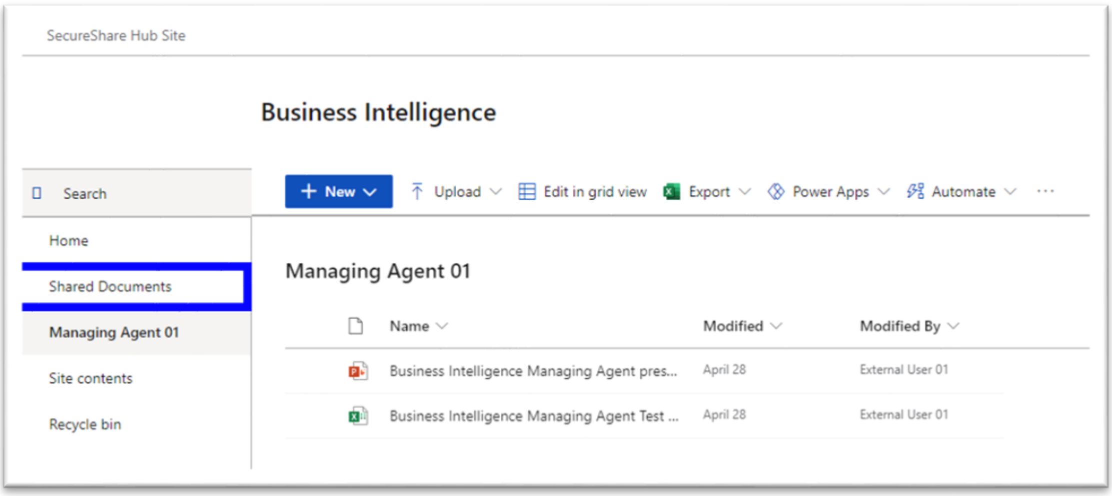
2. From this view, you can click any of the site panels listed in **Your Sites** to enter the Business Process site.



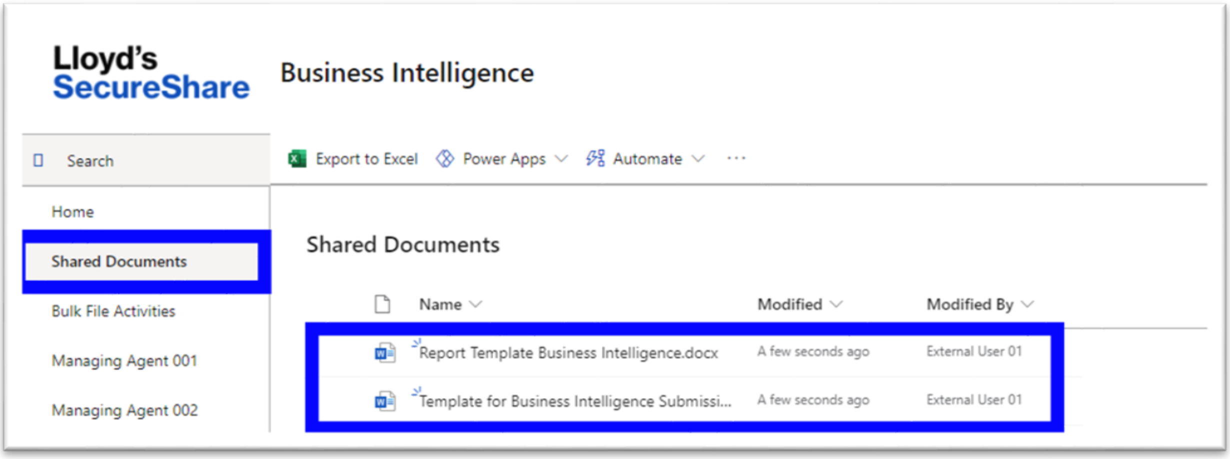
3. Once in your business process site, in this instance the **Business Intelligence site**, you will see **Most recent documents**. These are personalised documents that are relevant to you. On the left hand menu you can see all of the specific entities within the business process site. You can click on the specific entity to see the documents within. In this case, you then click on the entity **Managing Agent 01**.



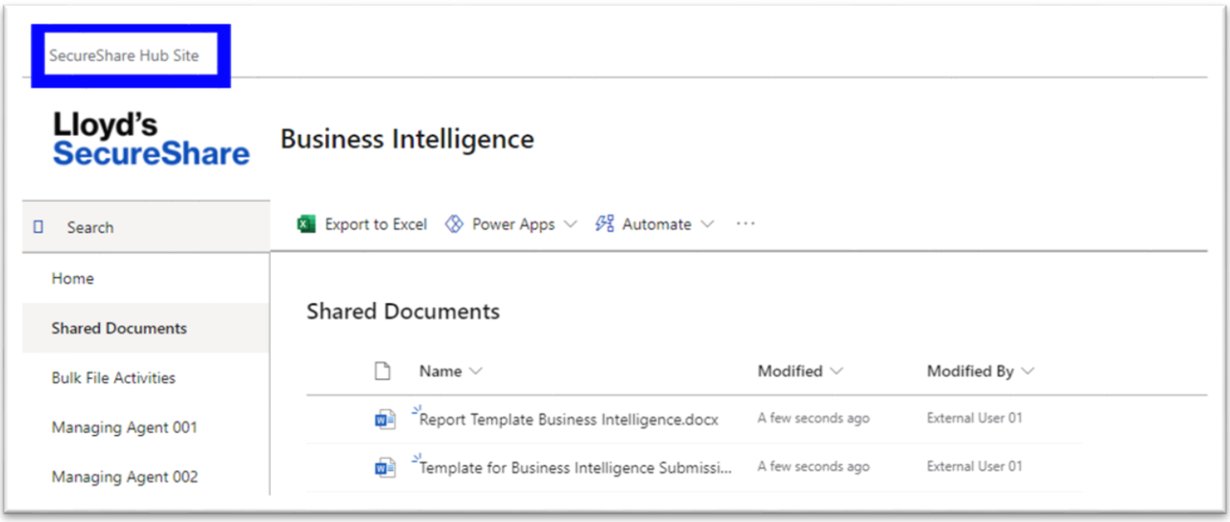
4. Within the entity site you will have a view of all documents – if you have **Contribute** access to the site, you will be able to upload/delete documents in addition to being able to download them.



5. To see all Shared Documents across the entire Business Process site, click on **Shared Documents** on the left-hand side. In Shared Documents you can see all templates and other documents that Lloyd's have uploaded as part of the Business Process site.
   Note: Market Users are unable to edit or add documents into Shared documents.

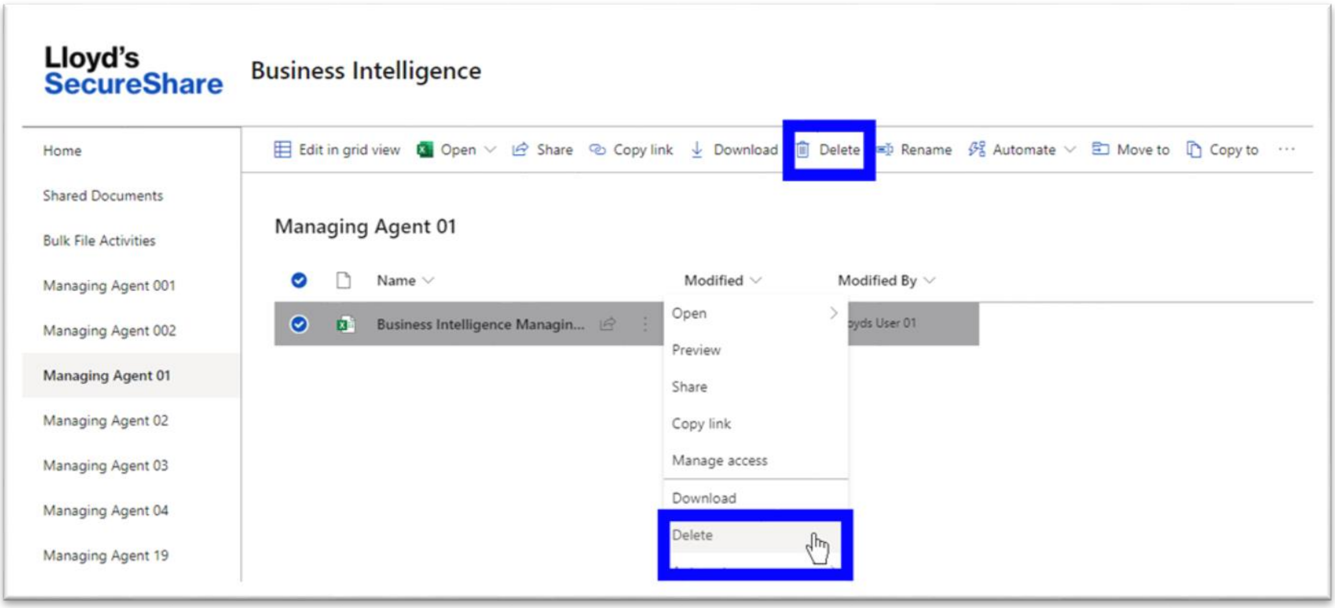


6. You can always return back to the home page by clicking on **SecureShare Hub Site** at the top left hand side of the screen.

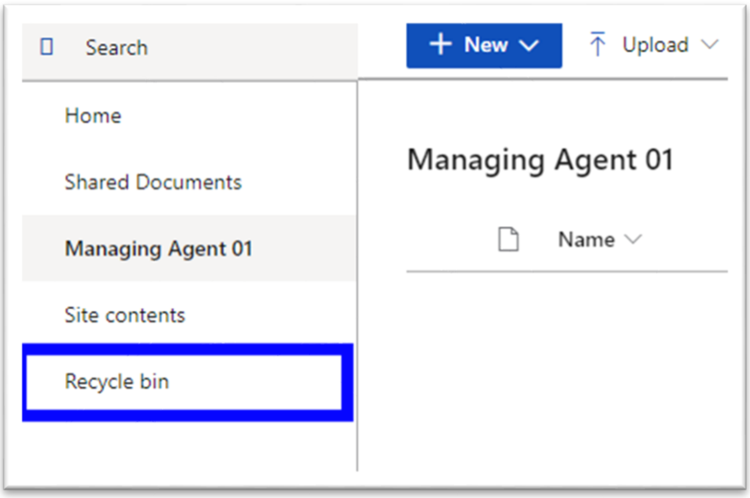


Using the Recycle Bin

1. To use the Recycle Bin, a document has to be deleted first. To delete an item select the document and either press **Delete** on the top toolbar or click on the show actions ellipses to open up the drop down menu and select **Delete**.

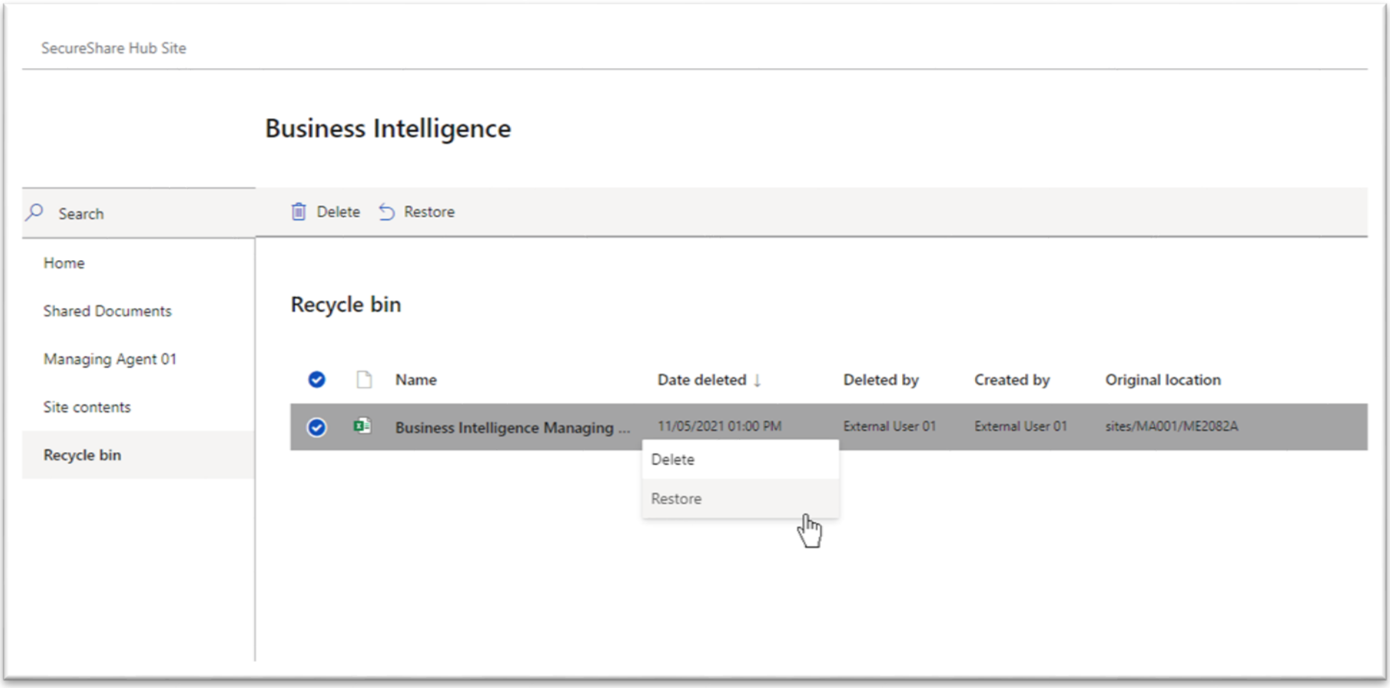


2. Once the document is deleted, I click **Recycle Bin** on the left-hand menu.



3. Once inside the Recycle Bin, you can see any documents or files that have recently been deleted for the Business Process site you are part of.

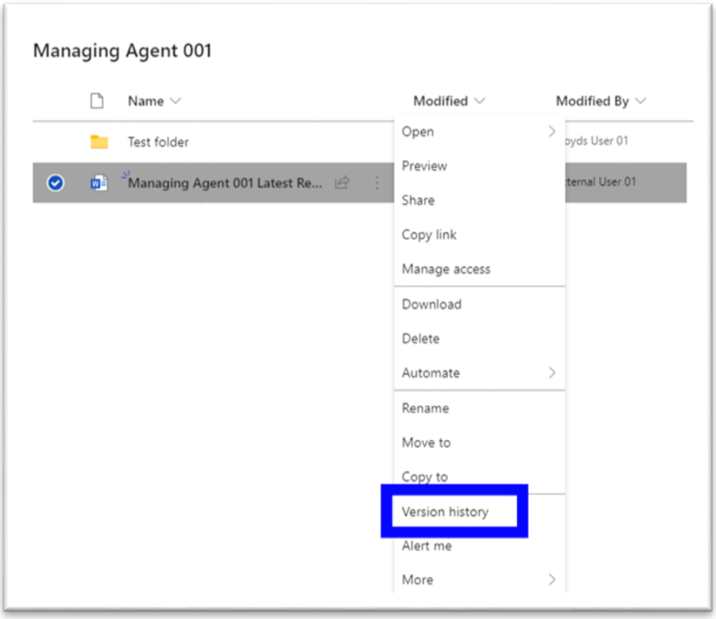
   If required, you can click **Restore** to restore the document back into the original library, or you can click **Delete** to permanently delete the file. This can be done by selecting the document and selecting the option from the top toolbar or the select actions drop down.



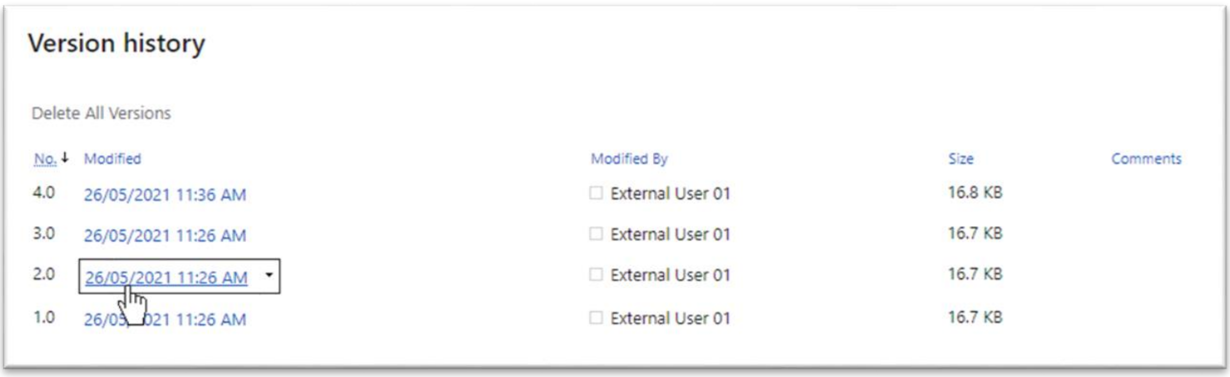
Using version control

1. When using and modifying files, you may occasionally wish to view a file's previous version or revert it to this point.

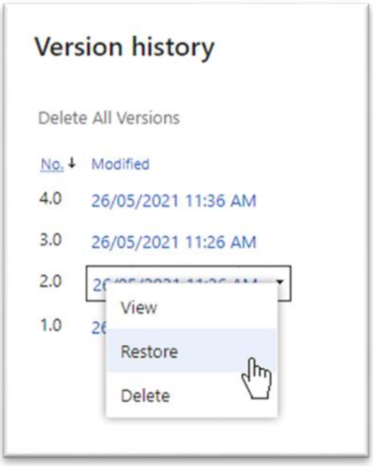
   To do so, right click on a file and then click on **Version History**.



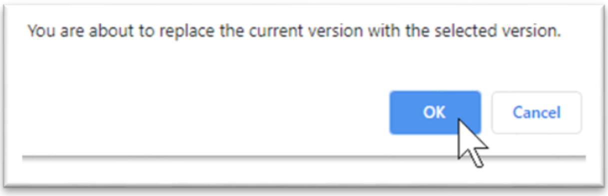
2. You will then see a view of all previous versions. To view a previous version, click onto the document link.



3. If you wish to restore this version of the document, click on the drop-down arrow to the right of the version date and then click **Restore**.

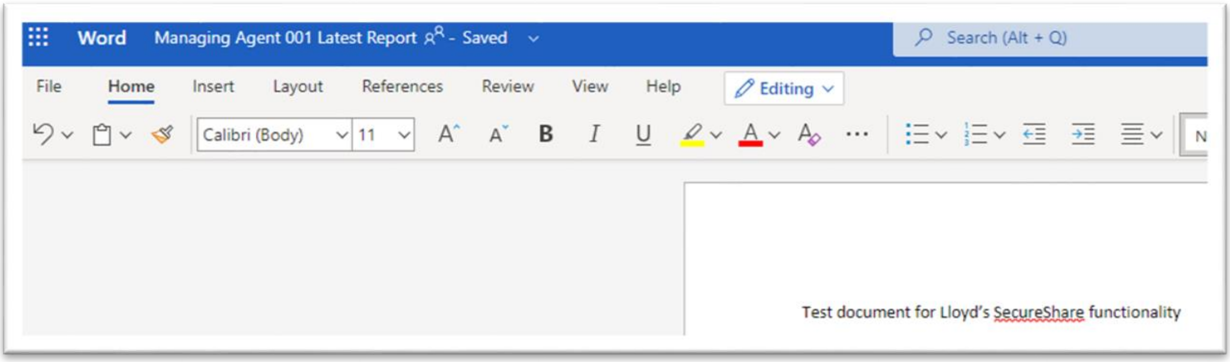


4. Click **Ok** to enact the change.

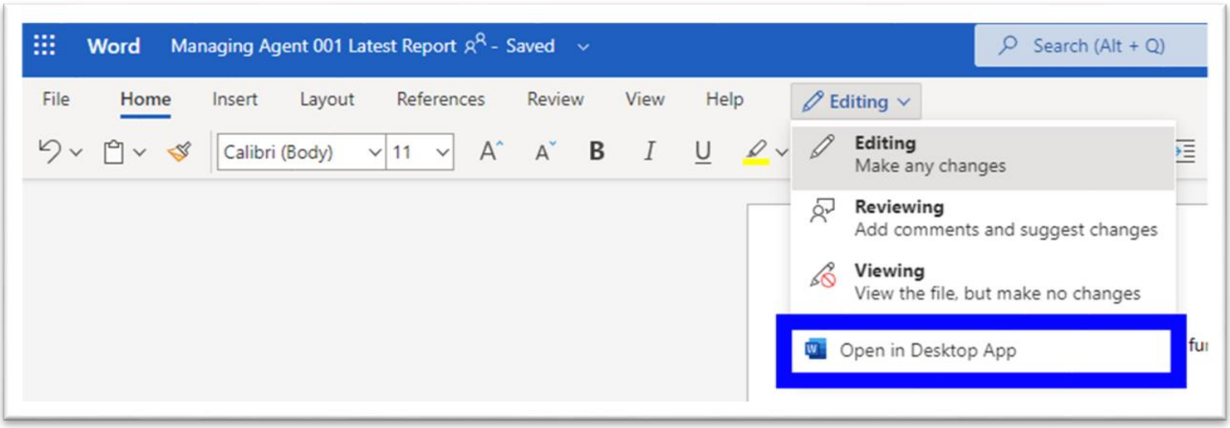


Opening desktop application versions of documents

1. When a document is opened in SecureShare, you will access it within the online version of the application – in the case of the screenshot below, Word Online.



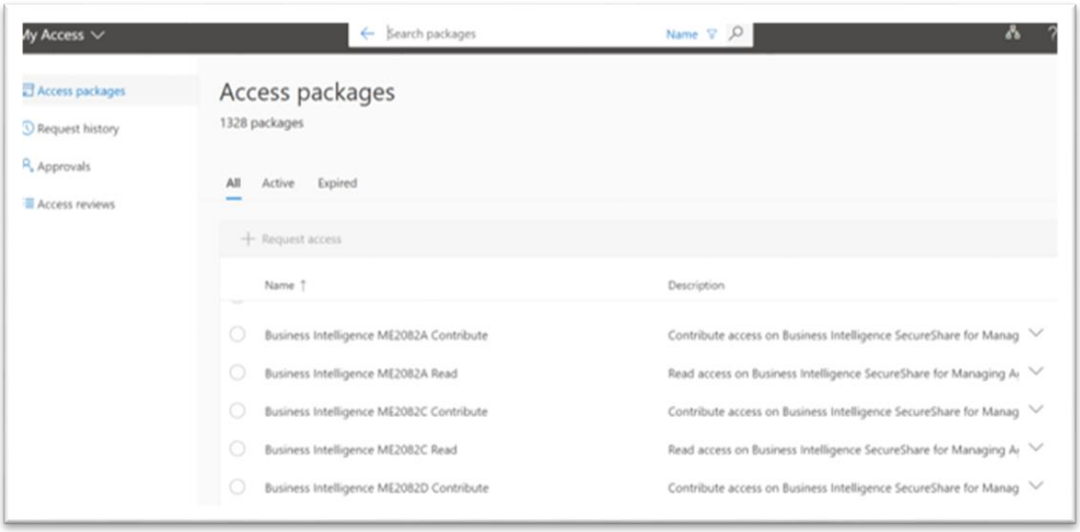
2. To open a document in the desktop application, click the **Editing** button in the middle of the screen and then click **Open in Desktop App**.



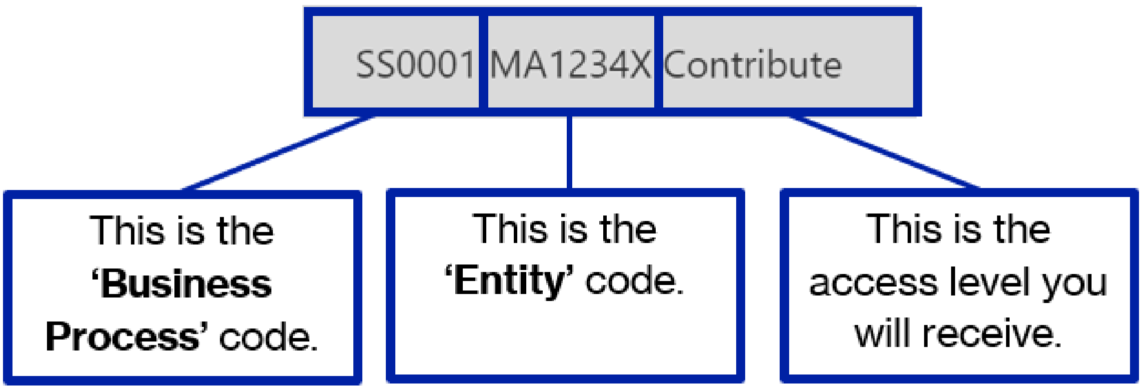
Identifying site names

Finding required sites

1. Enter My Access – this shows all sites you can request access to.
2. Scroll down the list or use the 'search packages' search bar to find a site name.
   Note: You can search using the business process name or your entity number.



The annotation below shows how site naming conventions work within Lloyd's SecureShare.



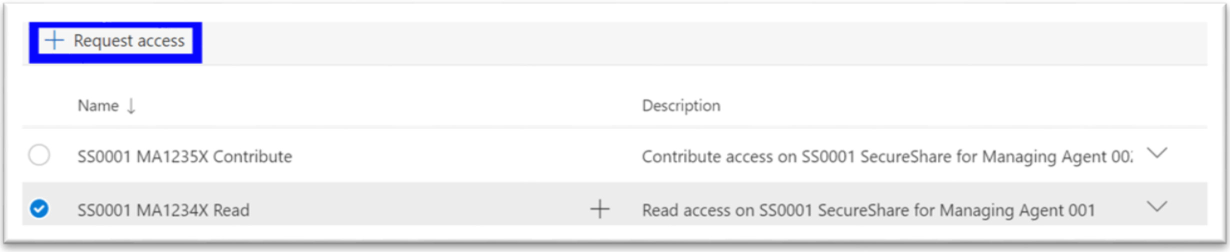
Site approval

Please note that Lloyd's users will request access differently to Market users. Lloyd's users will use a SecureShare Access Request Form on MyService.

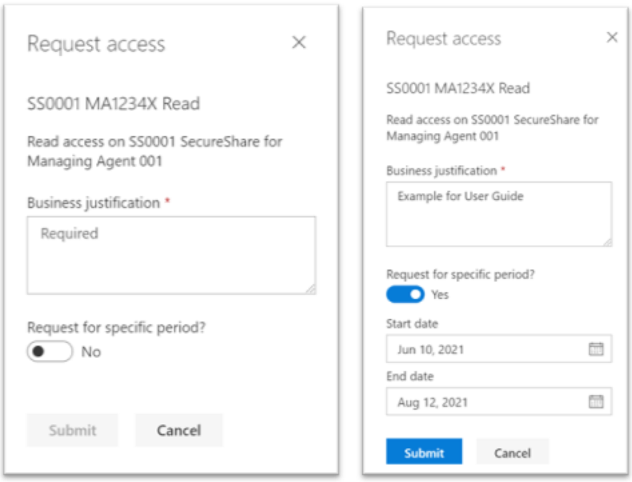
Making an access request

1. Once you have identified the site you require in MyAccess, click onto it.

2. You can then click the **Request access** button to open the request menu.



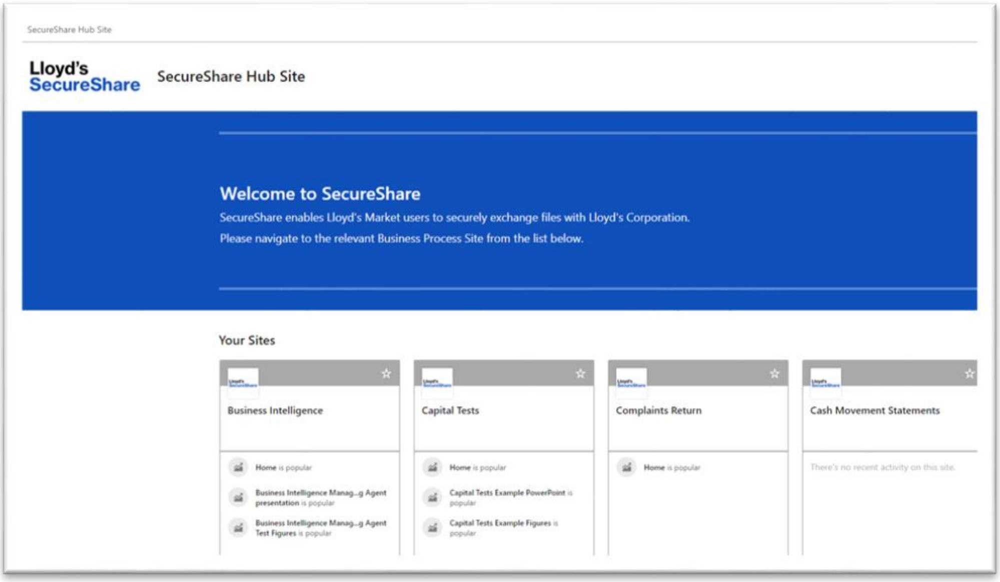
3. In the resulting **Request access** menu, insert the business justification and a specific period timeframe if required.



4. You then click **Submit** to complete the approval request.

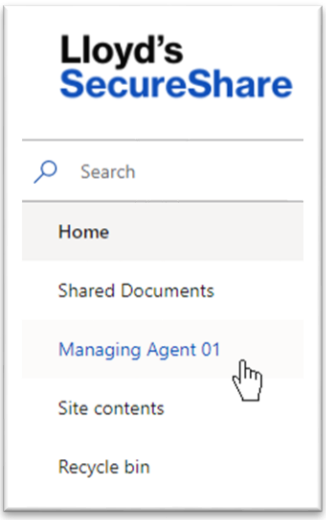
Accessing approved sites

1. First, enter the SecureShare Hub Site.



2. Click onto the site you require within **Your Sites**.

3. On the left-hand side of the resulting Business Process site, click onto your entity that you belong to.
   *Note: In this example, we use **Managing Agent 01** as below.*

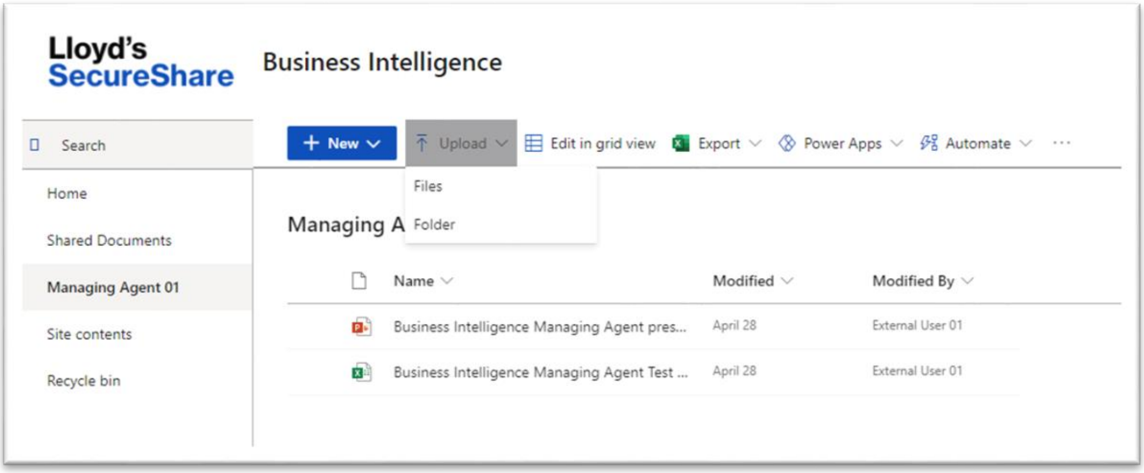


Uploading and downloading documents

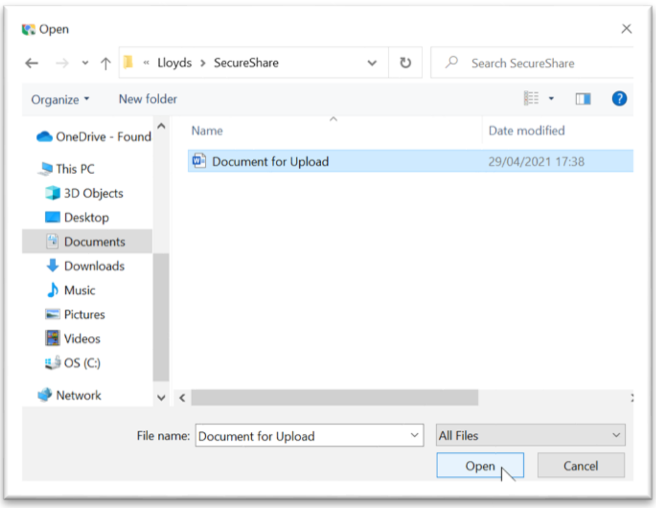
Uploading documents

1. Begin within the correct entity in the relevant Business Process site.
   *Note: You must have requested **Contribute** access for this site.*

2. Click the **Upload** button on the bar at the top of this site and then choose either **Files** or '**Folder**.



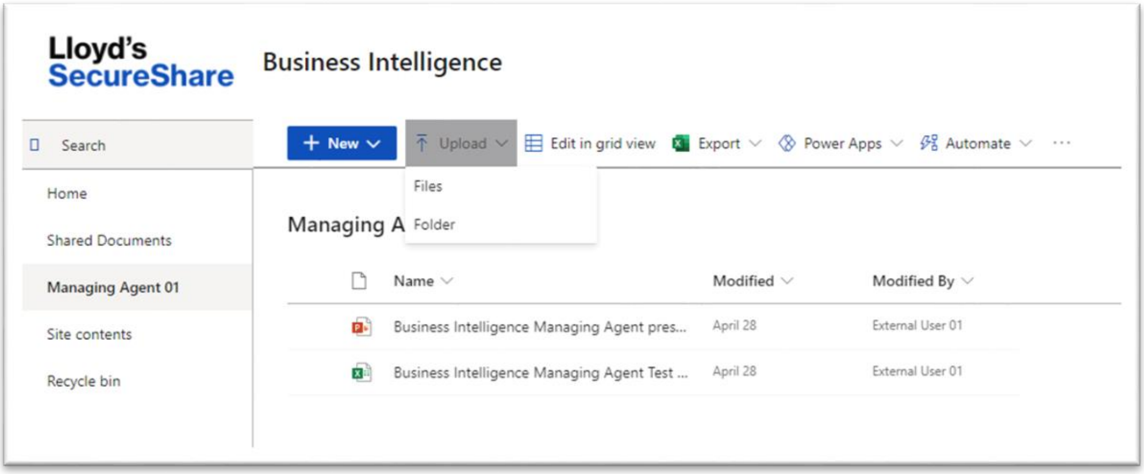
3. In the resulting File Explorer menus, select the file you wish to upload then click **Open** to complete the download process.



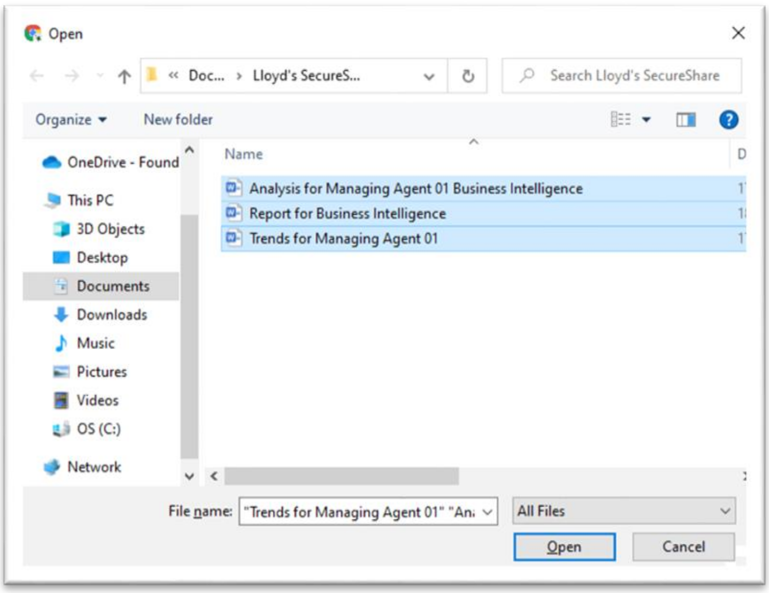
Uploading multiple files

1. Begin within the correct entity in the relevant Business Process site.
   *Note: You must have requested **Contribute** access for this site.*

2. Click the **Upload** button on the bar at the top of this site and then choose either **Files** or **Folder**.



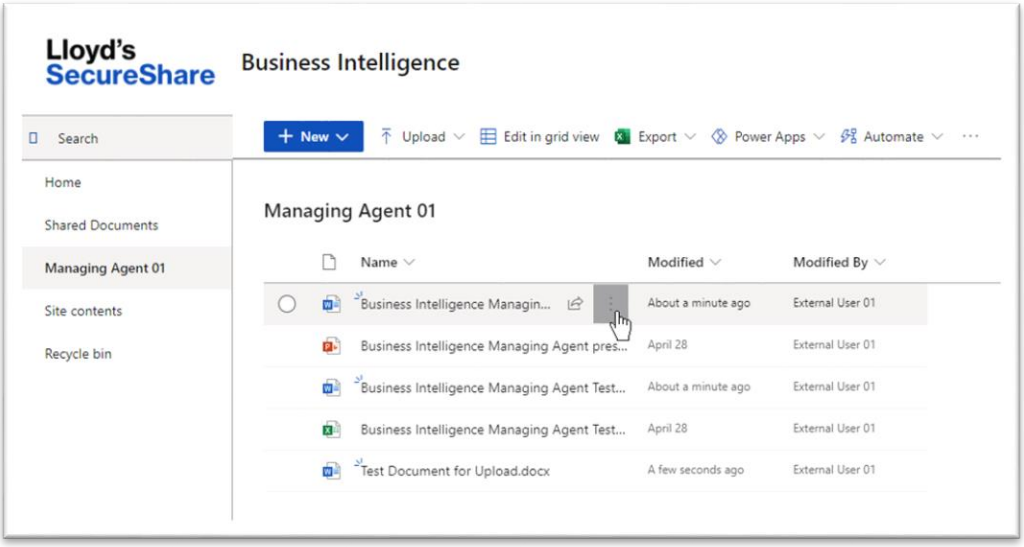
3. To select multiple files within a view on File Explorer, hold the SHIFT button on your keyboard and click onto all the files you wish to upload. Click **Open** to complete upload.



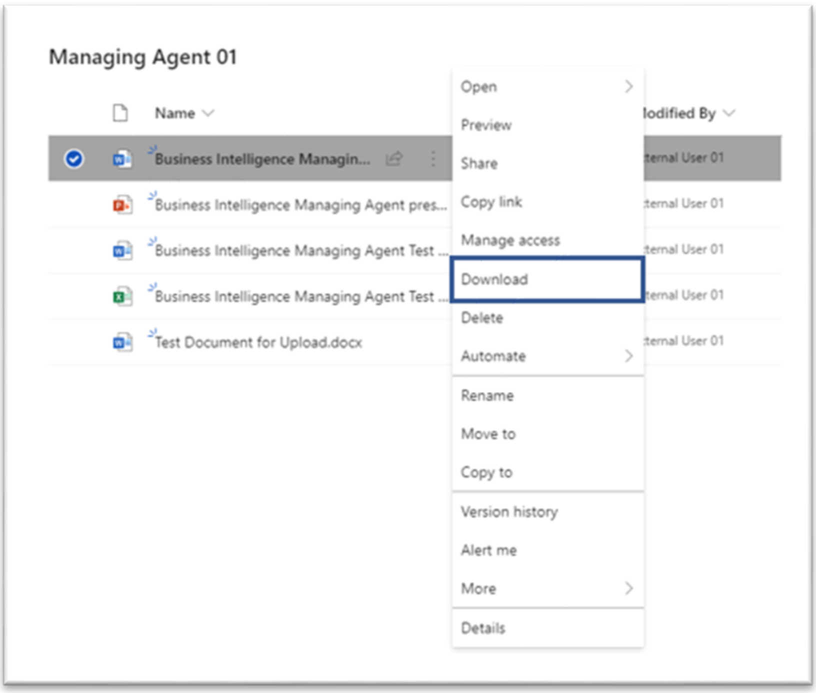
Downloading documents

1. Begin within the correct entity in the relevant Business Process site.

2. Click the **Show Actions** ellipses on the right hand side of the required file.

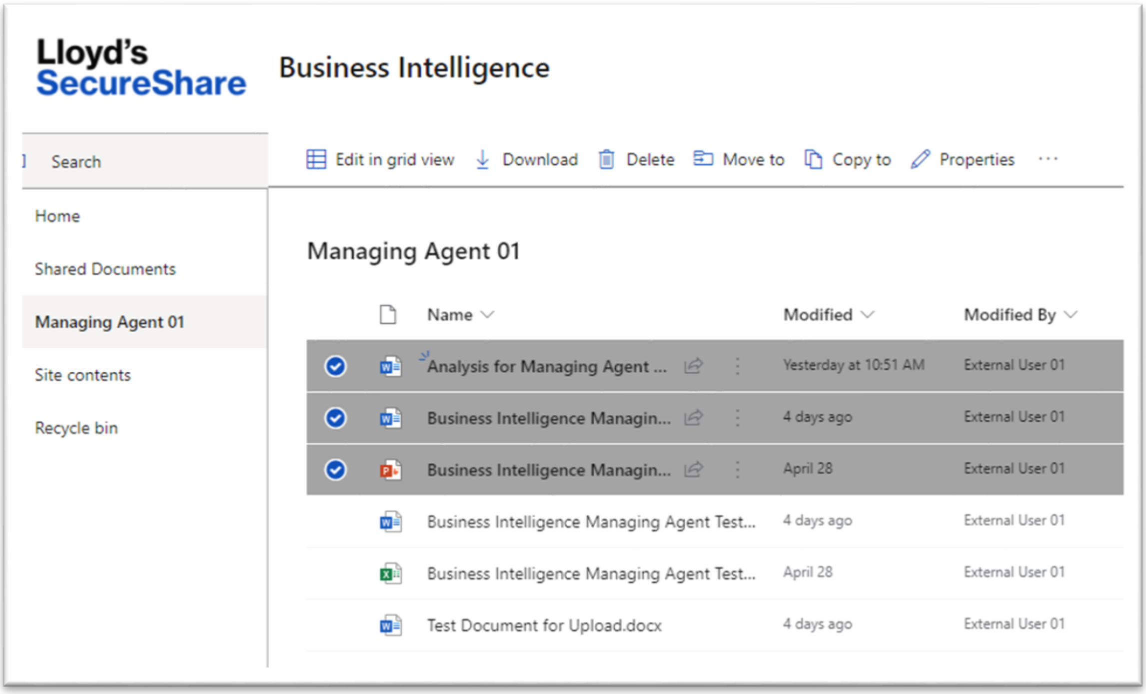


3. In the following drop-down list, click **Download**.

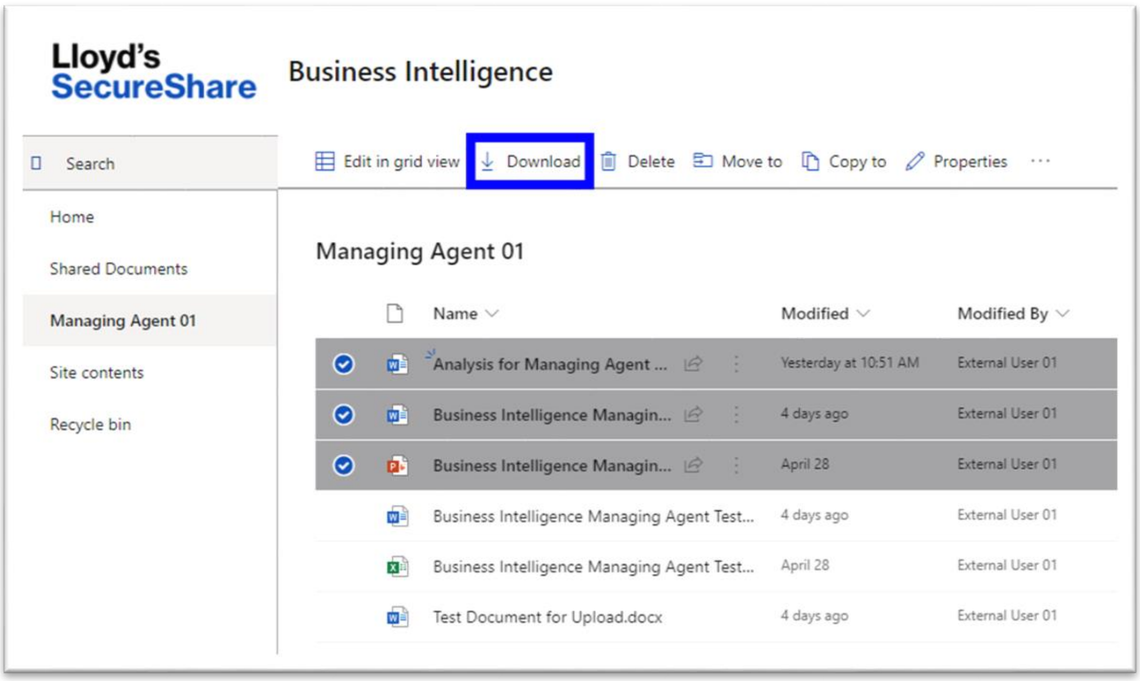


Downloading multiple files

1. Begin within the correct entity in the relevant Business Process site.
2. Click the check circles next to each document you wish to download.



3. Click the **Download** button at the bar at the top to complete the process.

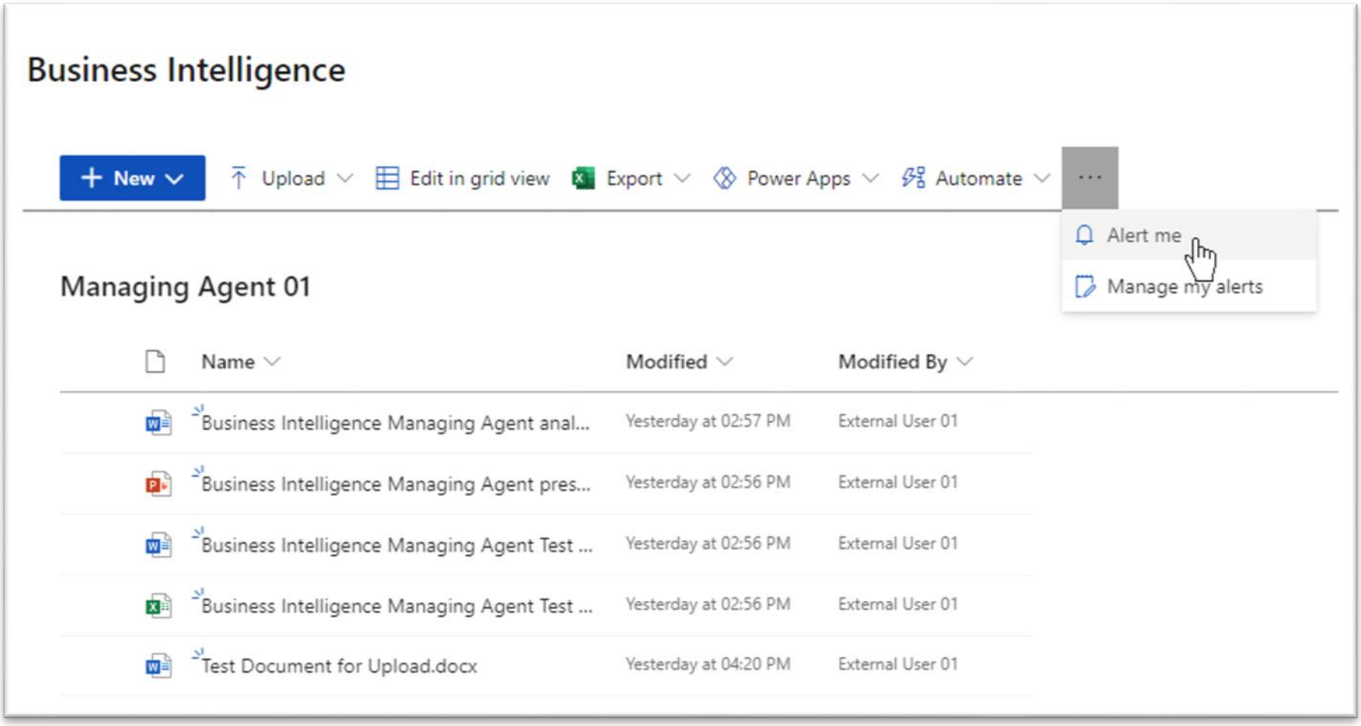


Creating and managing alerts

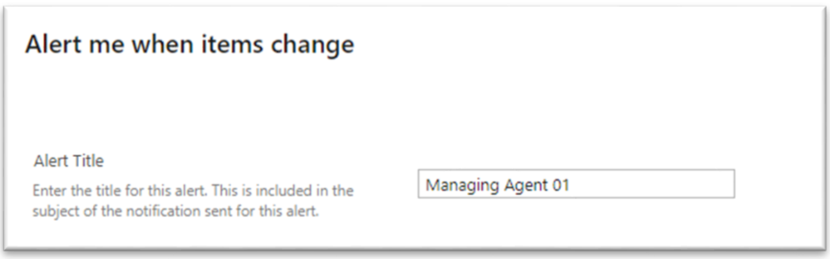
Creating alerts

1. Begin within the correct entity in the relevant Business Process site.

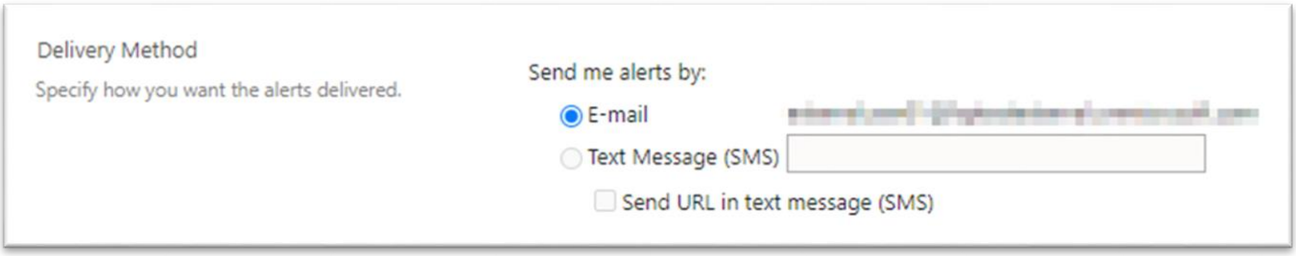
2. Click the ellipses to the right of **Automate** and click **Alert me**.



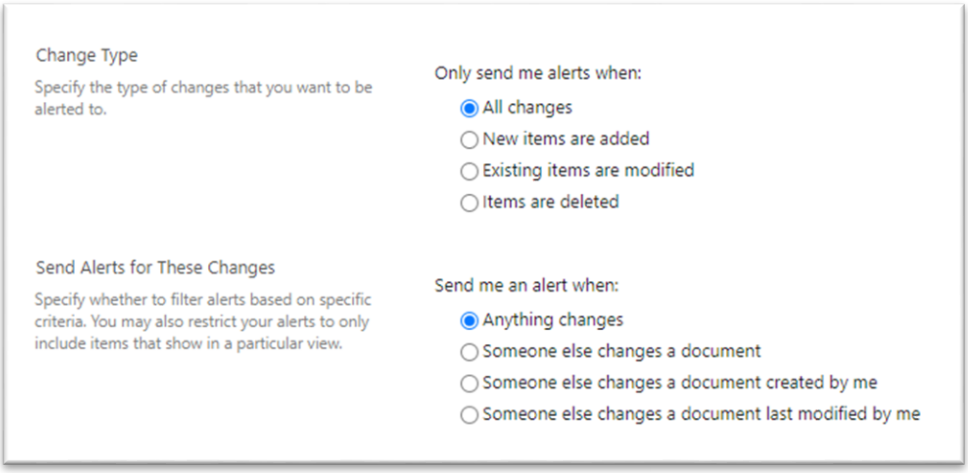
3. On the following screen, write an **alert title** in the text box given.



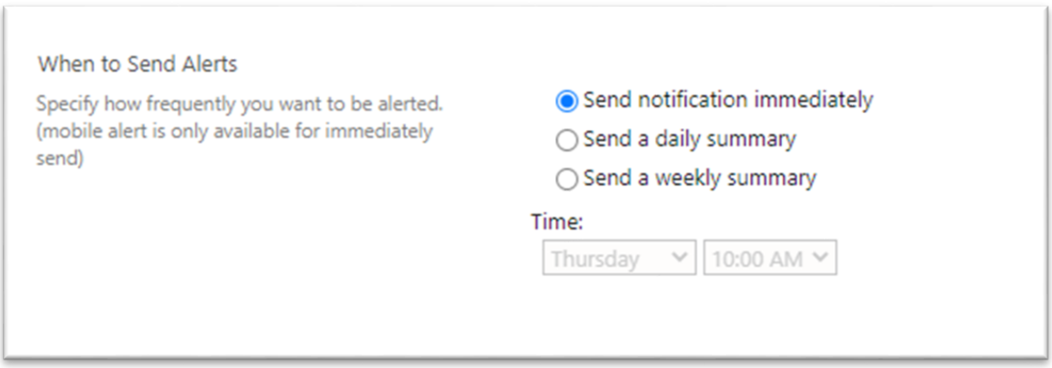
4. After entering the title, select the **delivery method** for any created alerts.
   Note: you can select your own email or you can enter your phone number.



5. Select the **criteria** for any alerts to be created.
   Note: alerts can be created for all changes or specific changes, such as a new item being added.



6. Choose the **frequency** of any alerts being sent. If the alert is daily or weekly, you are able to select time of day and day sent.

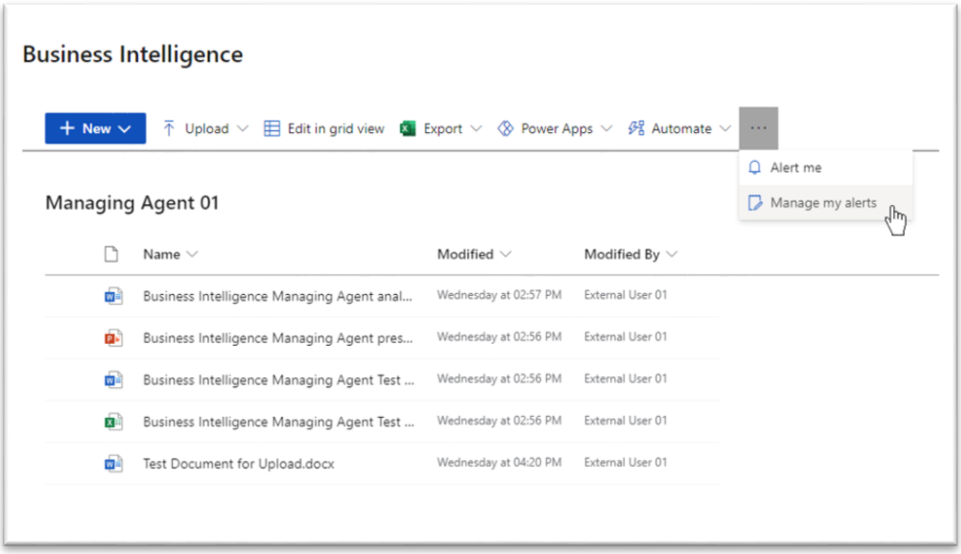


7. Click **Ok** to complete alert setup.

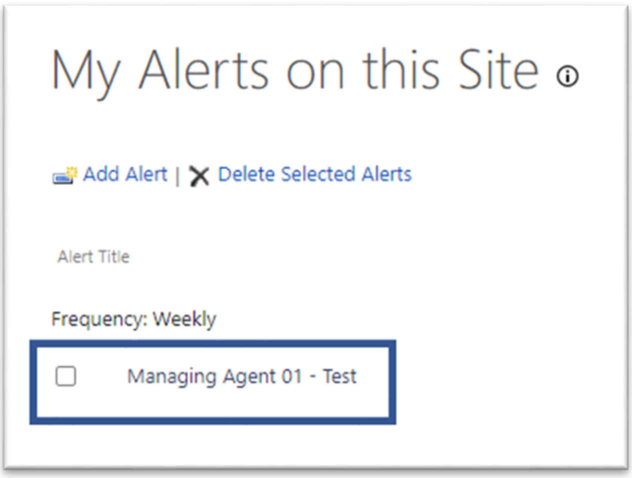
Editing alerts

1. Begin within the correct entity in the relevant Business Process site.

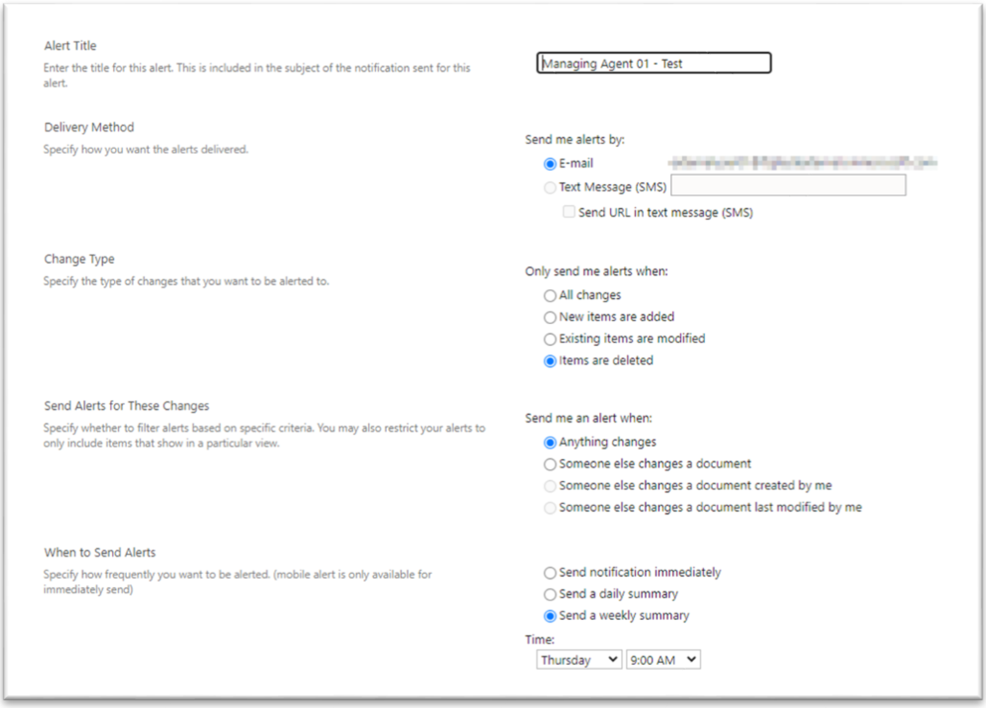
2. Click the ellipses to the right of **Automate** and click **Manage my alerts**.



3. In the following **My Alerts on this Site** page, click onto the alert you wish to edit.



4. In the following screen you will be able to change the same information that you inputted within **Creating alerts**.

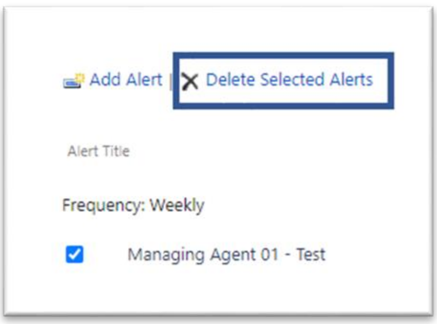


5. Once required changes have been made, click **OK** to save changes.

Deleting alerts

1. From the **My Alerts on this Site** page, click the checkbox on the alert you wish to delete.

2. Once the checkbox has been selected, click on **Delete Selected Alerts**.



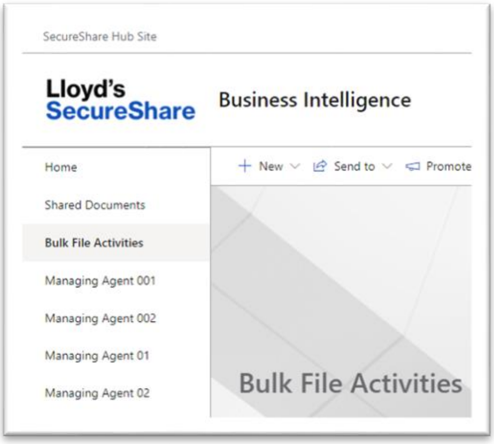
3. Click **Ok** when prompted.

The Bulk Upload Process

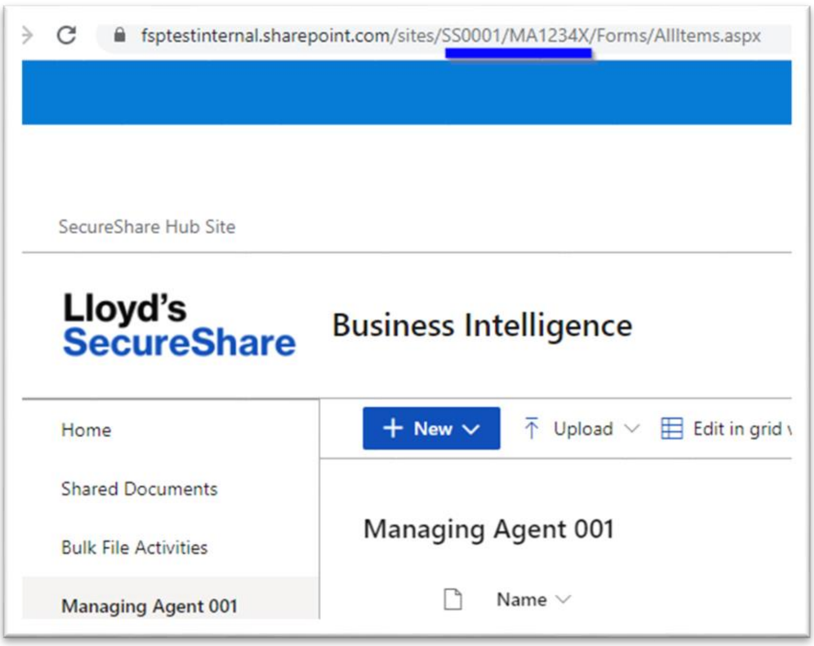
Please note that Bulk Operations processes are restricted to Lloyd's users only.

Preparing folders

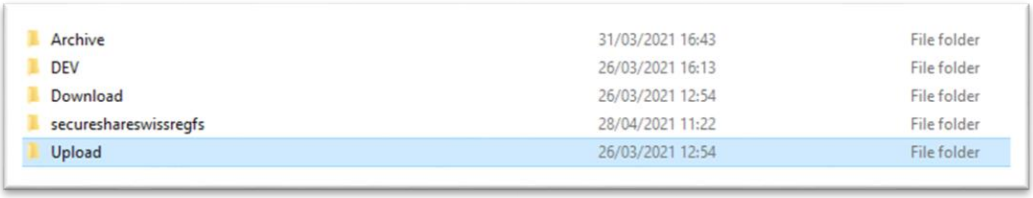
1. To begin, start in the Business Process site where you will be completing the Bulk Upload process. In the screenshot below, this is **Business Intelligence**.



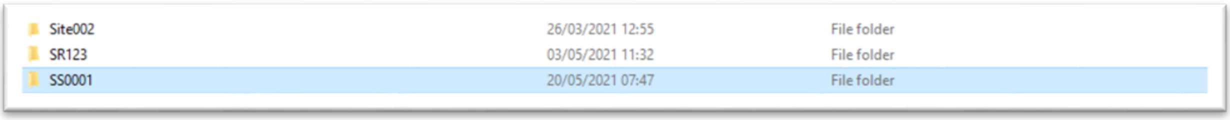
2. You then navigate to the **Entity** site where you will be completing bulk operations. In this case, this is **Managing Agent 001** on the left. Record the numbers in the URL at the top of the screen – **SS0001** is the Business Process code, and **MA1234X** is the 'Entity' number (Managing Agent 001, in this case).



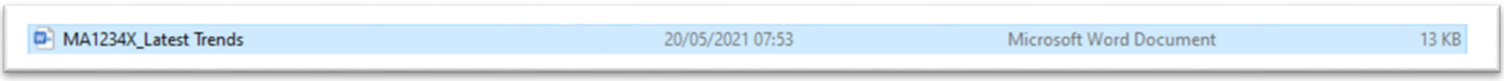
3. Once you have noted the two numbers, enter the FileShare path mapped in File Explorer. Within FileShare, you then enter the **Upload** folder.



4. In the **Upload** folder you see all of the Business Process codes which currently have folders for them. You then click on **MA001**, as you know that this is the Business Process code you require.
   Note: New folders can be created using the regular File Explorer method.

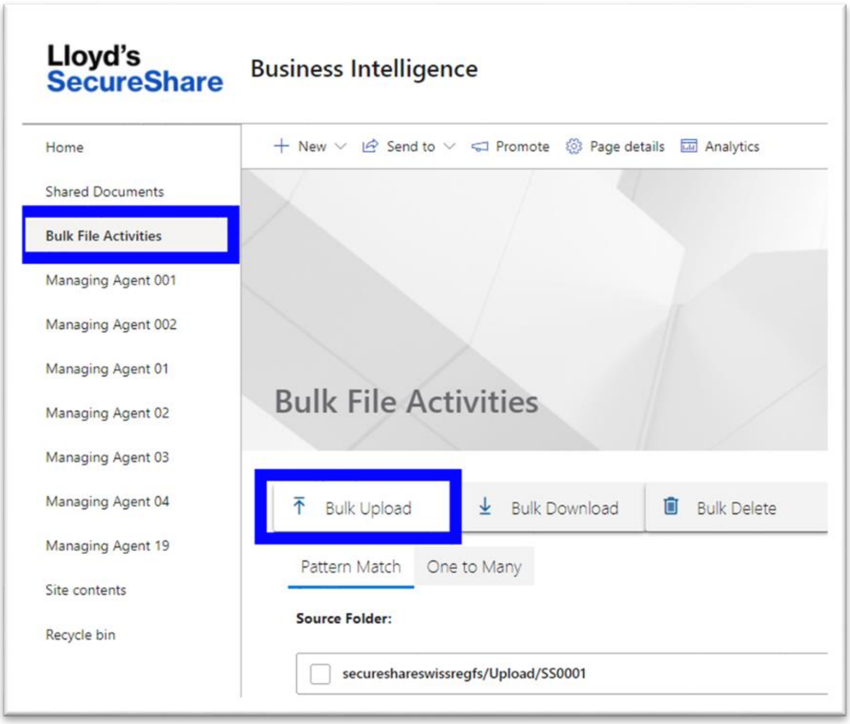


5. Within the **MA1234X** folder you can see a file stored called **M1234X_Latest Trends**. This is the correct naming convention for the file which you will upload to **Managing Agent 01**, which has the entity code of **M1234X**.
   *Note: The naming convention for files is: **Entity number_desired file name***

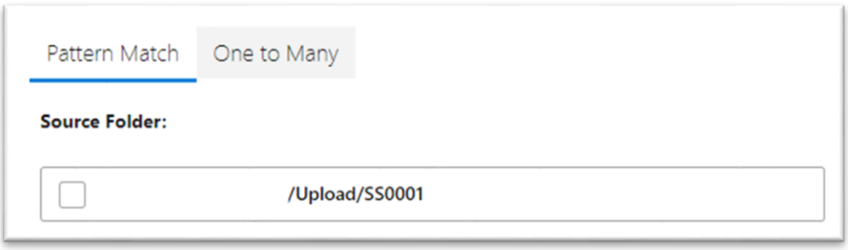


Completing the upload process

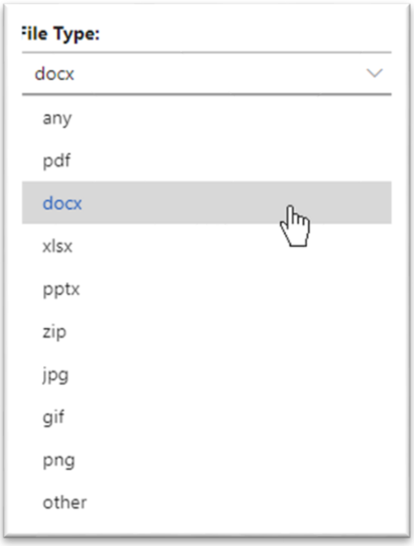
1. Once you have made sure that the fileshare and the documents are set up correctly, you navigate to **Bulk Operations** within the Business Process site and ensure that you are on the **Bulk Upload** menu.



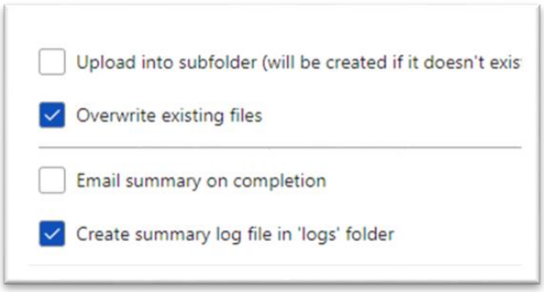
2. In the next step, you are asked to choose a **Source Folder**. As the **MA001** folder exists in the fileshare, the option ending **/Upload/MA001** exists. You click on this.



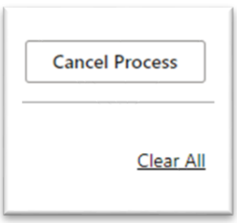
3. Once you have selected a Source Folder, you have to choose which file types will be uploaded from the Source Folder into Managing Agent 01 on SecureShare. You click **.docx**, as you know that my document is a Microsoft Word item.



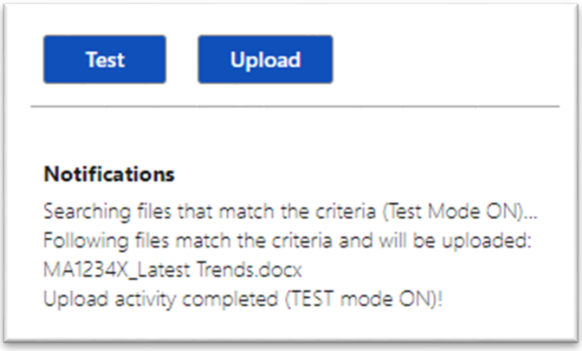
4. Once the source folder and the File Type is set, you complete the preparations by toggling any additional settings. In the image below, we choose to **overwrite existing files** with the same names and to also **create a summary file afterwards**.



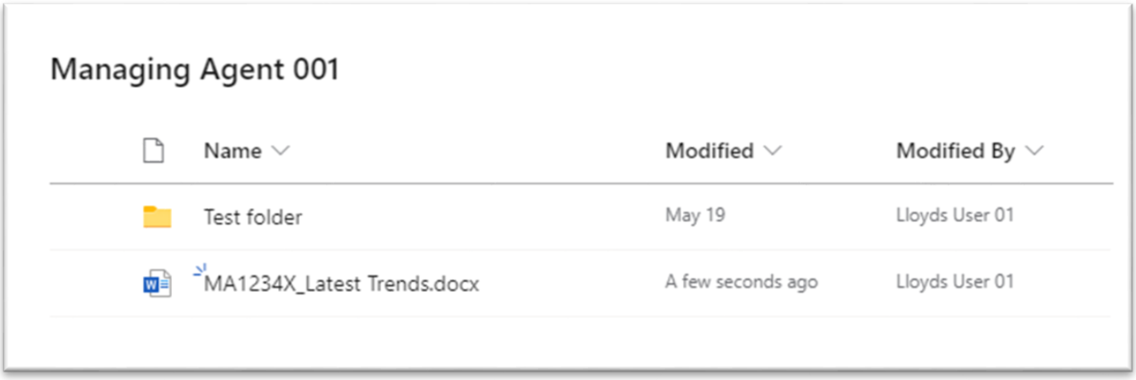
5. Note that at any time, the **Cancel Process** button on the right-hand side can be used to cancel the process being undertaken.



6. With settings completed, you click the blue **Test** button.
7. The test shows whether documents are found. If successful, the final **Upload** button appears in blue. Click on this to complete the process.



8. As is seen in the screenshot below, the **MA1234X_Latest Trends** file has been uploaded to the **Managing Agent 001** folder correctly.

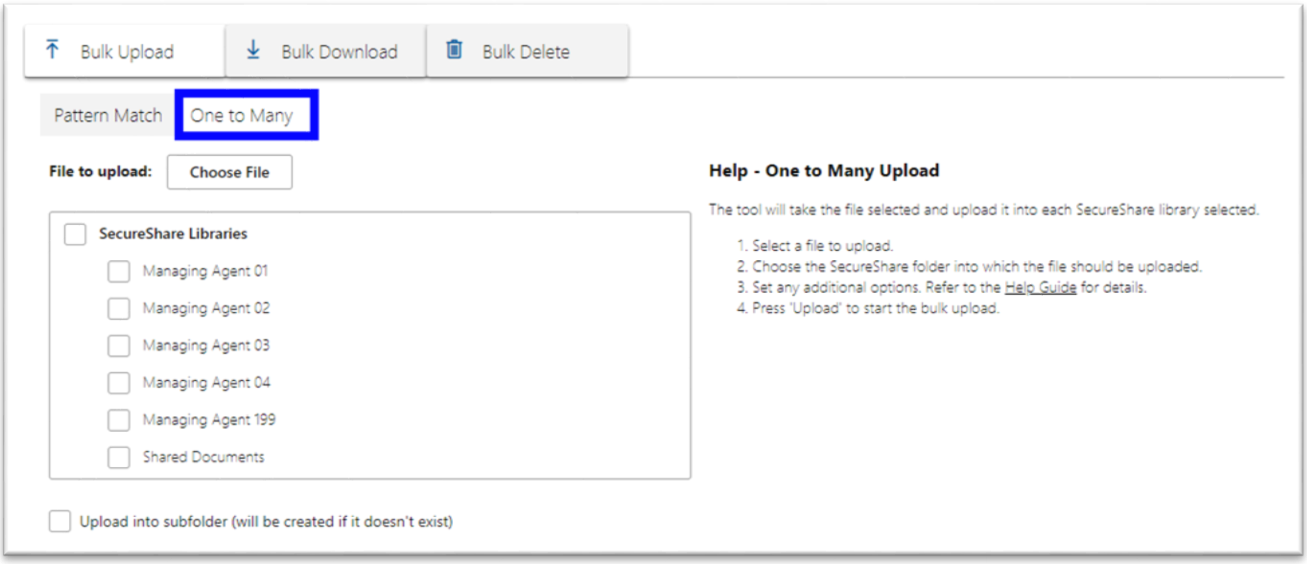


Completing ‘One to Many’ upload

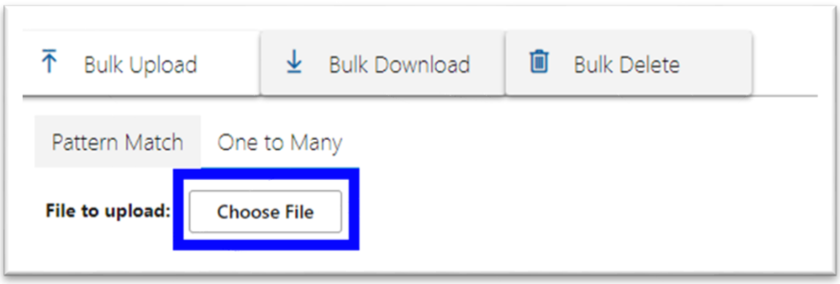
1. Start within the Business Process site you wish to complete an upload for.

2. Enter Bulk File Activities using the options on the left before clicking **Bulk Upload**.

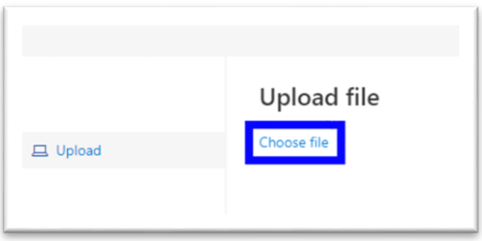
3. Once in the **Bulk Upload** section, click on the **One to Many** option highlighted in the screenshot below.



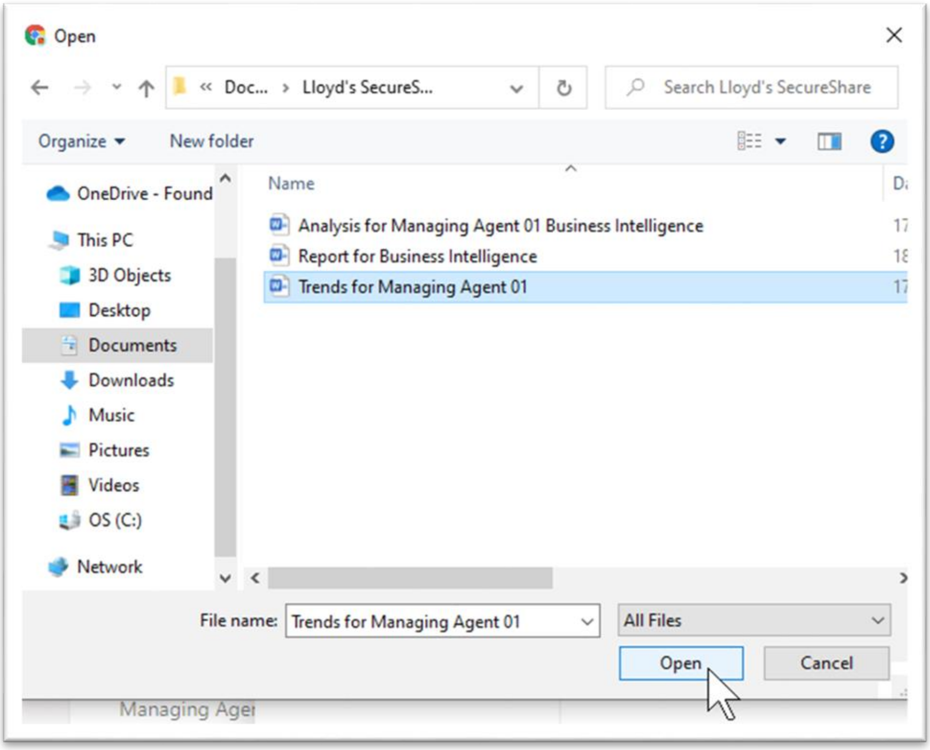
4. In the **One to Many** section, click on the **Choose File** button.



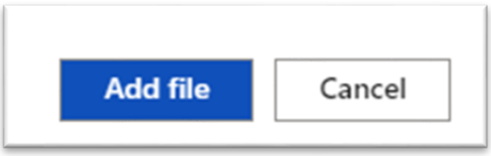
5. In the resulting screen, click **Choose file.**



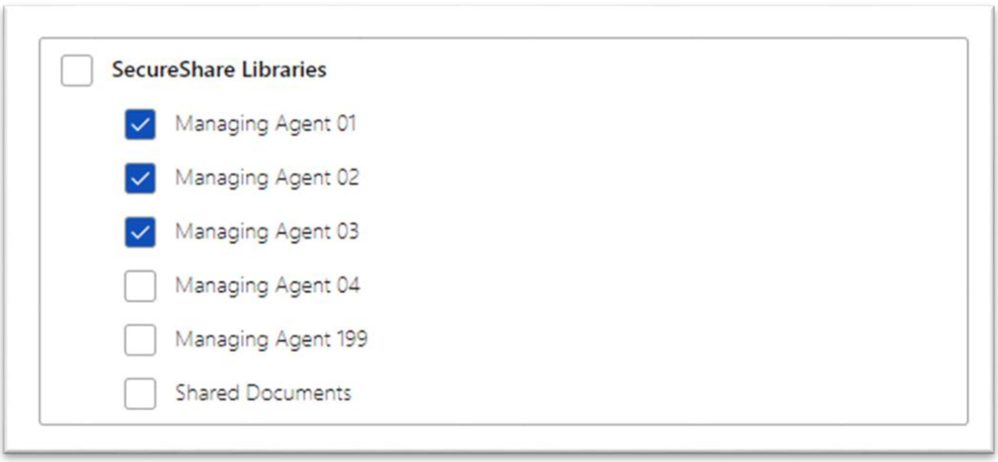
6. Select the appropriate file within File Explorer and click **Open**.



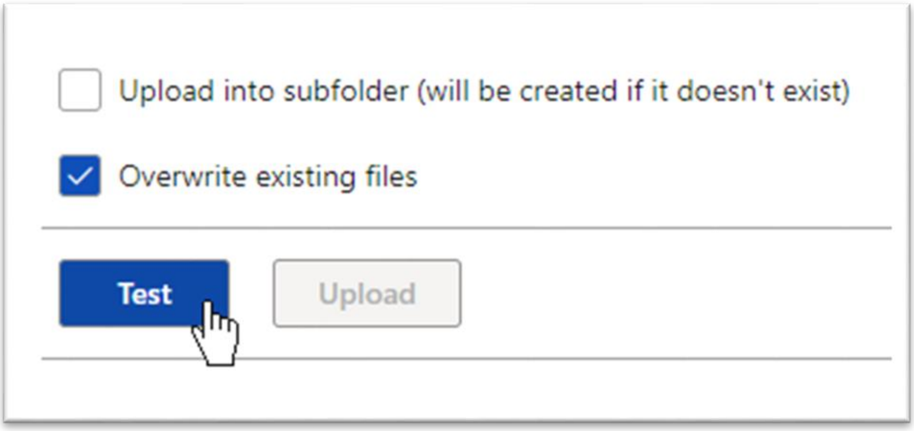
7. Once the file is selected, click **Add file** in the following screen.



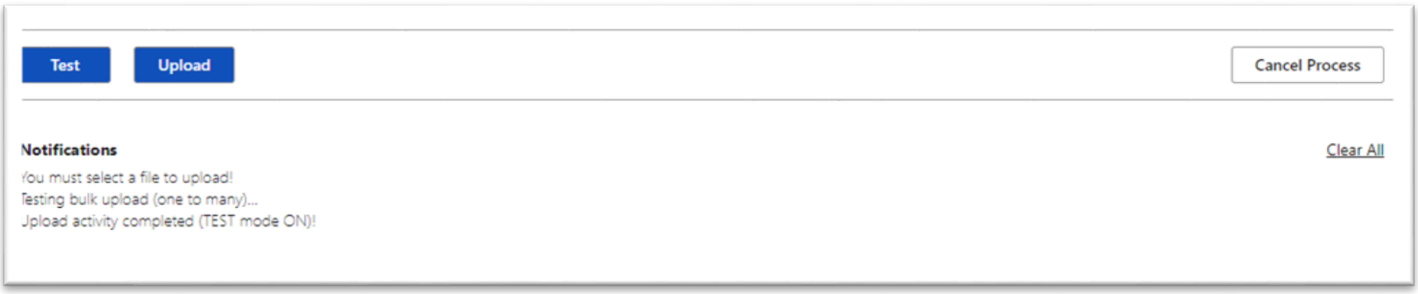
8. Next, click on the libraries you wish to upload the one file to. In the case of the below, Managing Agent 01, Managing Agent 02 and Managing Agent 03 are chosen.



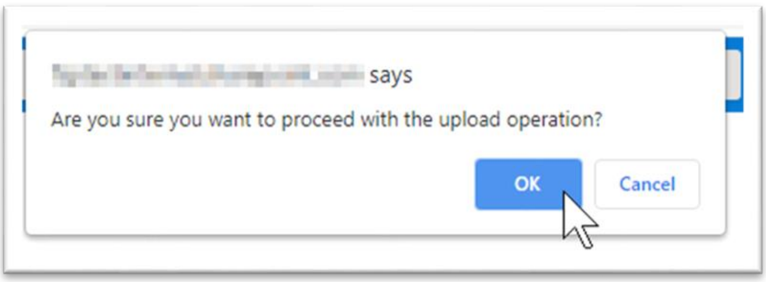
9. Once the libraries are selected, toggle the settings you require below – subfolders can be created within the entities, whilst any duplicate files can be overwritten if required (selected in this case). Once settings are confirmed, click **Test**.



10. If the test process is successful, the **Upload** button appears in blue. Click on this.
    *Note: the **cancel process** button is available on the right at any time.*



11. Click **OK** when prompted.



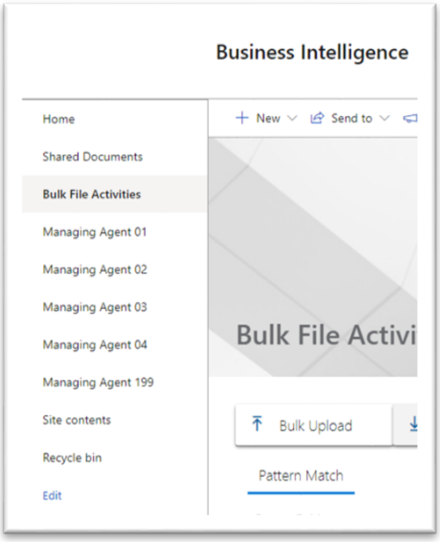
12. The **One to Many** upload process will now have completed, with multiple versions of the same file uploaded to SecureShare libraries.

The Bulk Download Process

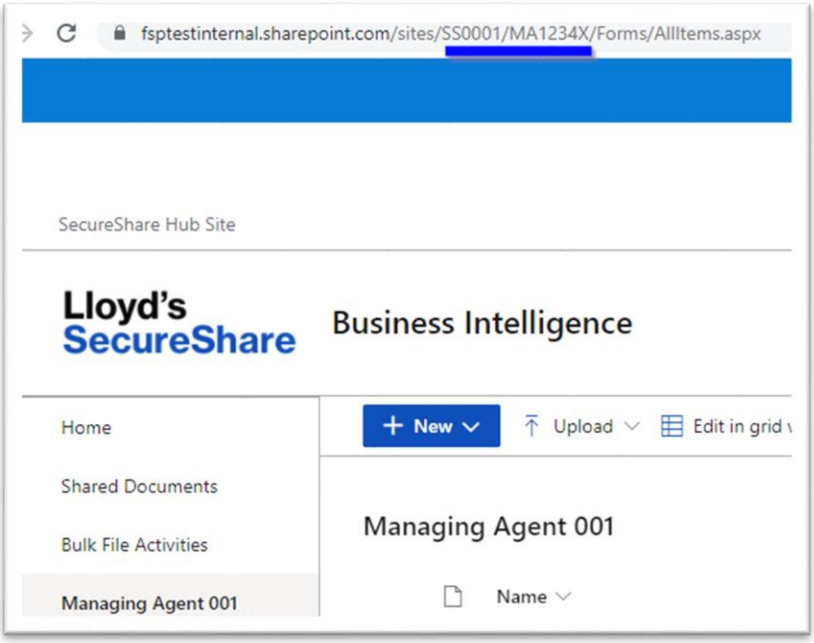
Please note that Bulk Operations processes are restricted to Lloyd's users only.

Preparing folders

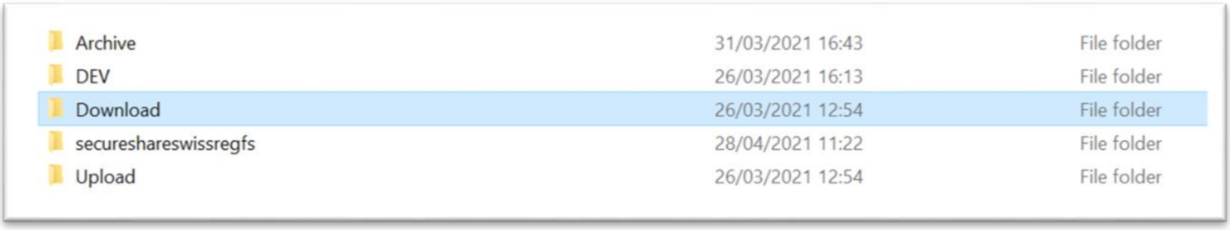
1. To begin, you start in the Business Process site where you will be completing the Bulk Upload process. In the screenshot below, this is **Business Intelligence**.



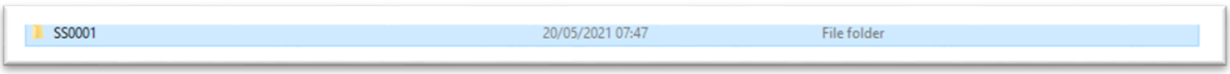
6. You then navigate to the **Entity** site where you will be completing bulk operations. In this case, this is **Managing Agent 001** on the left. Record the numbers in the URL at the top of the screen – **SS0001** is the Business Process code, and **MA1234X** is the **Entity** number (Managing Agent 001, in this case).



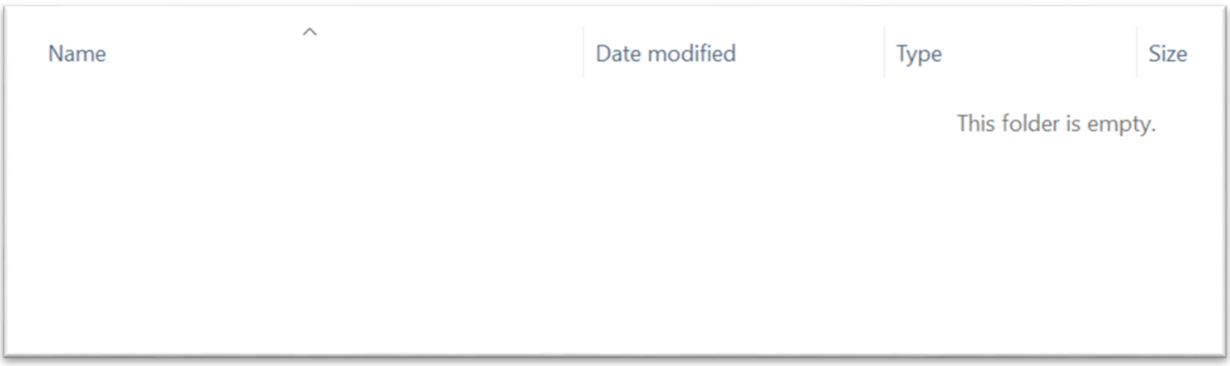
2. Once you are aware of the two numbers, you enter the fileshare path mapped in File Explorer. Within the fileshare, you enter the **Download** folder.



3. Once in the **Download** folder, you then click into SS0001.

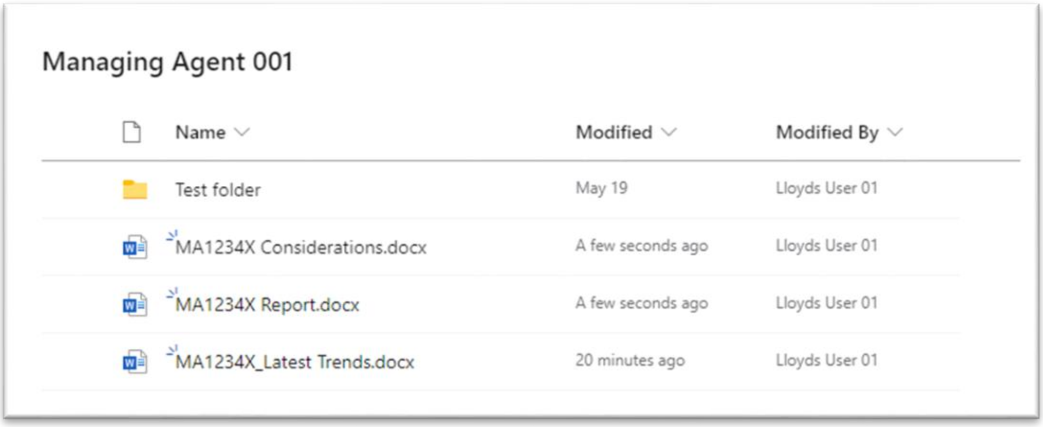


4. You can see within the SS0001 folder that it is empty.

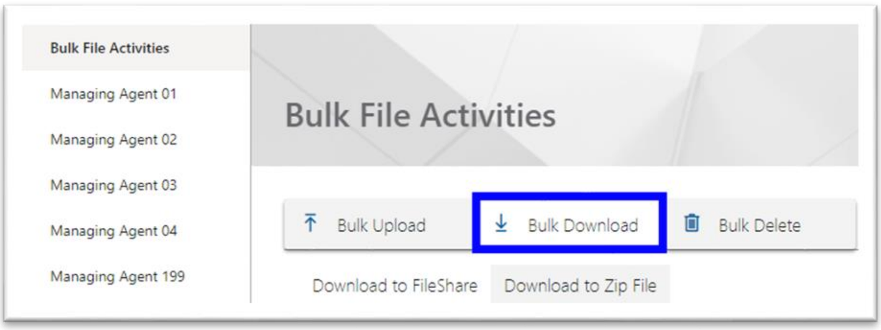


Completing the download process

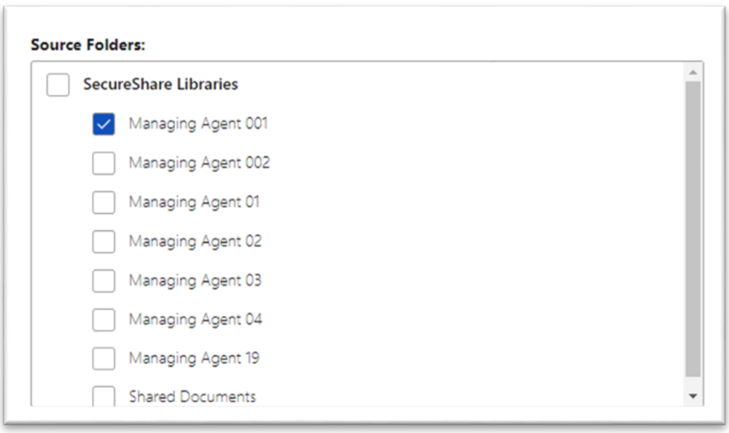
1. Now that you have ensured the file share has a folder prepared (SS0001 in **Download**), you check the Managing Agent 001 entity to see which files will be downloaded.



2. You will then proceed to **Bulk File Activities** within the **Business Intelligence** Business Process site and click on **Bulk Download**.

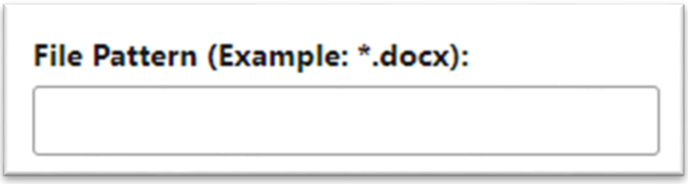


3. The next option is to choose **Source Folders**. In this case, only the contents of **Managing Agent 01** will be downloaded, so this option is selected.
   *Note: Click **SecureShare Libraries** for all libraries within the Business Process.*



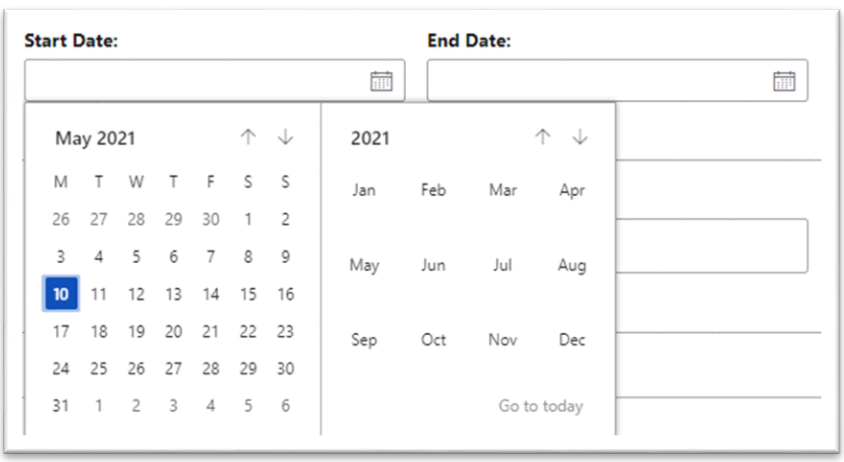
4. The next section gives you the option to include a **File Pattern**. This allows you to only search for certain documents to be downloaded.

> **File pattern instructions:**
> Asterisk (*) acts as a wildcard – if you want to search for certain text only, include this before the asterisk and the .file type.
>
> Example – ***MA1234X*.docx* searches for any file names starting with MA1234X in a .docx format.**



5. Once **File Pattern** has been completed (if required), the **File Type** is then chosen from the drop-down list.

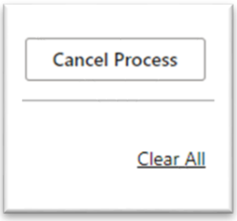
6. Once **File Type** is selected, you can also include **Start Date** and **End Date**. These narrow down the search to files modified within a certain time period.



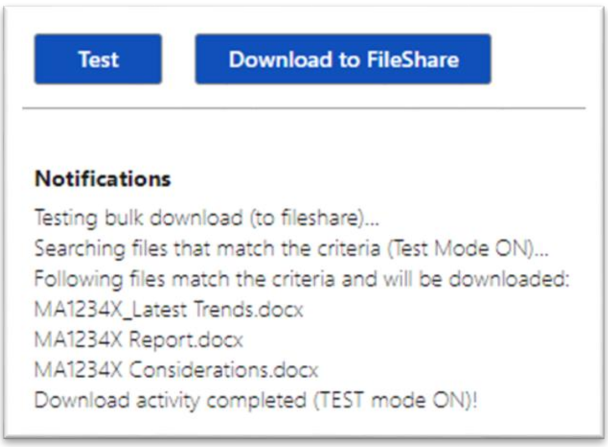
7. You will then be given the option to select the **Target Folder**. Click the target folder where files will be downloaded into – in this case, we will choose the **/Download/SS0001** file share path that was identified previously.

8. You can also select additional settings in this section if required. **Create folder for each Entity Library in target** creates a separate folder for each Entity library, whilst **Overwrite files in download folder** will overwrite any files in the download folder that are duplicates.
   Create summary log file in 'logs' folder creates a summary log within the SS0001 FileShare folder, whilst **Email summary on completion** will send a summary to your email address.

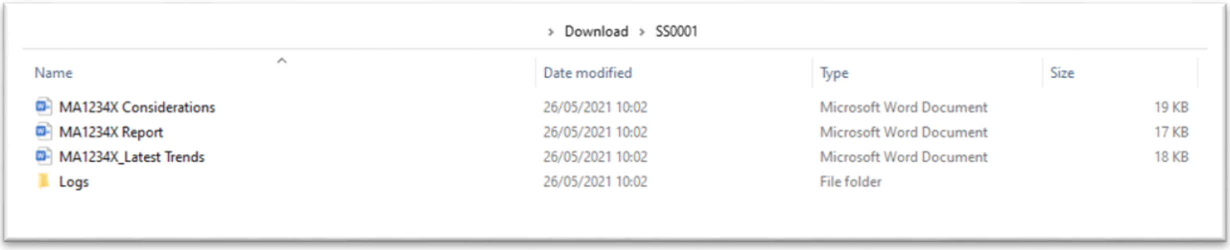
9. Note that at any time, the **Cancel Process** button on the right-hand side can be used to cancel the current process being undertaken.



10. Once the settings are completed, click the blue **Test** button. If the test is successful and files are identified for download, click **Download to FileShare** then **Ok** to complete the process.



11. When you navigate to the **Download** > **SS0001** folders in the FileShare, I can see that the three .docx documents that you chose for bulk download have been downloaded into the folder successfully.



› Download › SS0001

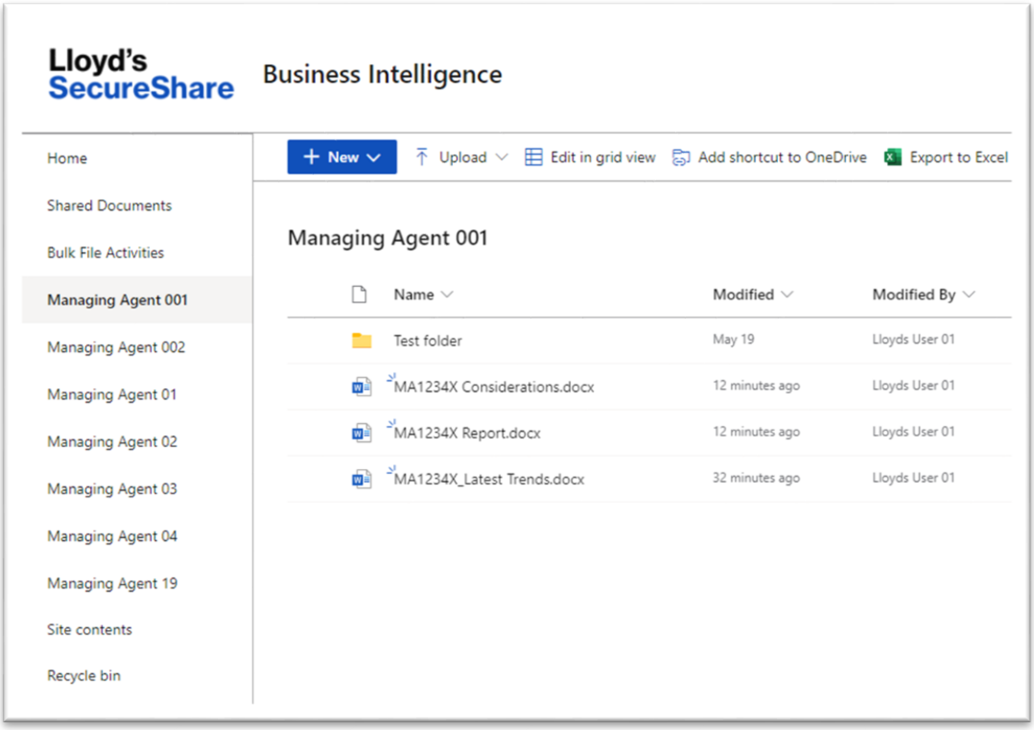
Name	Date modified	Type	Size
MA1234X Considerations	26/05/2021 10:02	Microsoft Word Document	19 KB
MA1234X Report	26/05/2021 10:02	Microsoft Word Document	17 KB
MA1234X_Latest Trends	26/05/2021 10:02	Microsoft Word Document	18 KB
Logs	26/05/2021 10:02	File folder	

The Bulk Delete Process

Please note that Bulk Operations processes are restricted to Lloyd's users only.

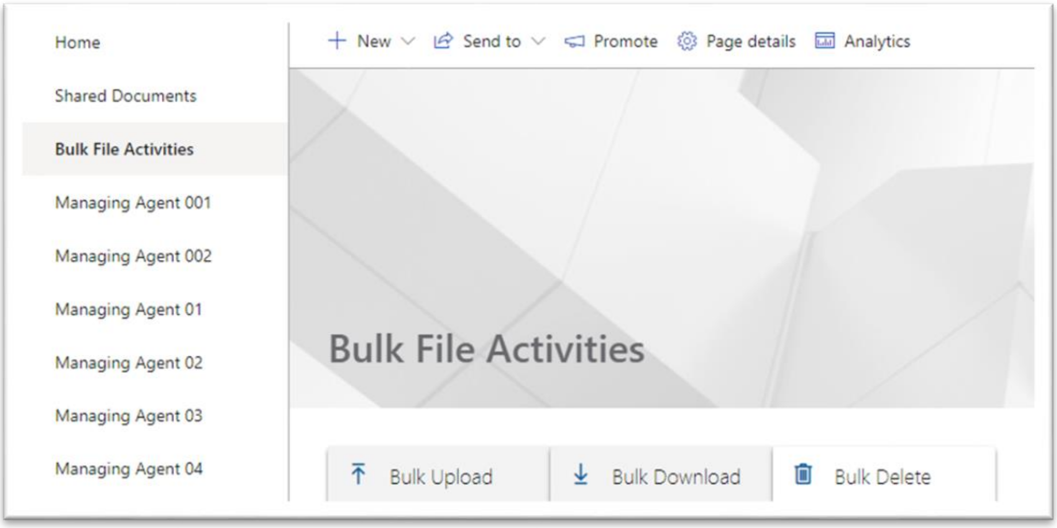
Preparing folders

1. You begin in the Business Process site that you would like to Bulk Delete files within. I navigate to the entity sites on the left-hand side that you would like to delete files from. Within **Managing Agent 001**, note the files that exist and the files that you wish to delete. You can also do this for the other **Managing Agent** entities if required.

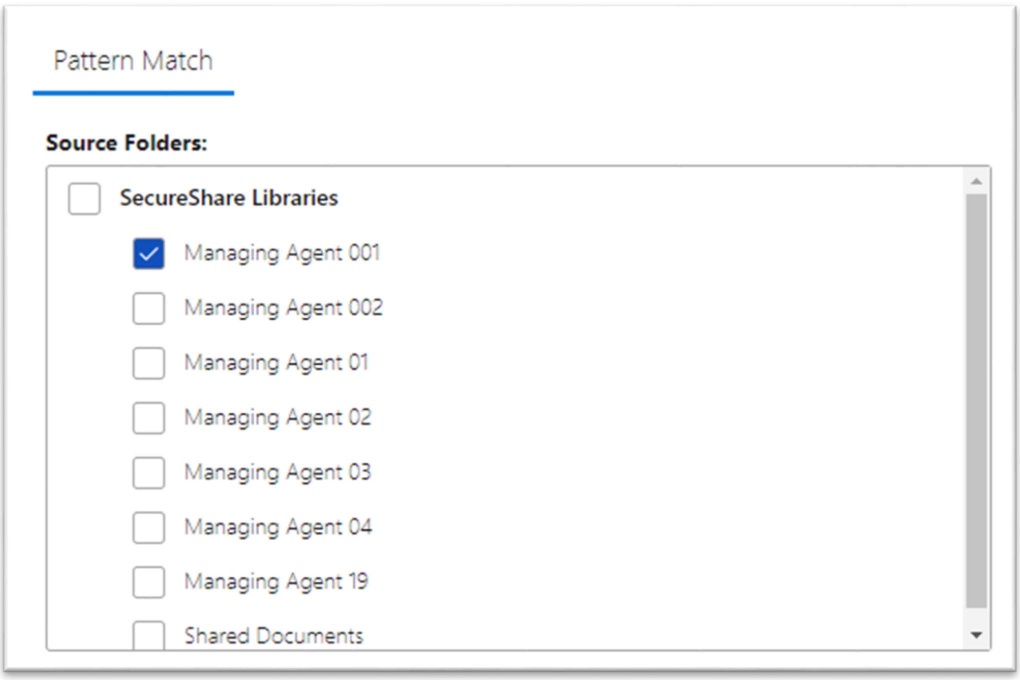


Completing the delete process

1. Once the folders and files for deletion are established, navigate to **Bulk File Activities** within the same Business Process site and then click on the **Bulk Delete** button.



2. In the **Source Folders** view, click on all of the libraries that you wish to delete files from. In this case, you will delete files from the **Managing Agent 001** folder only.



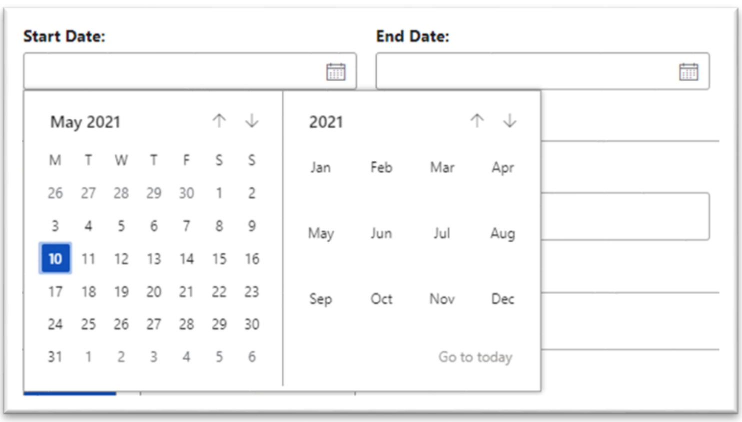
3. Once **Source Folder** is selected, you can then input a **File Pattern** to only delete certain files if required. For this exercise you will only delete .docx files within the folder, so this selection will be left empty.

File pattern instructions:
Asterisk (*) acts as a wildcard – if you want to search for certain text only, include this before the asterisk and the .file type.

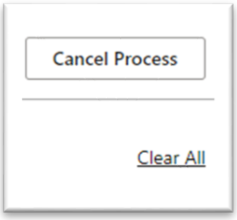
Example – ***MA1234X*.docx* searches for any file names starting with MA1234X in a .docx format.**

4. In the adjacent **File Type** drop-down menu, you are given the option as to which file types to delete. In this case you will only delete .docx documents, so click onto docx.
   Note: Please note that only one file type can be selected at a time.

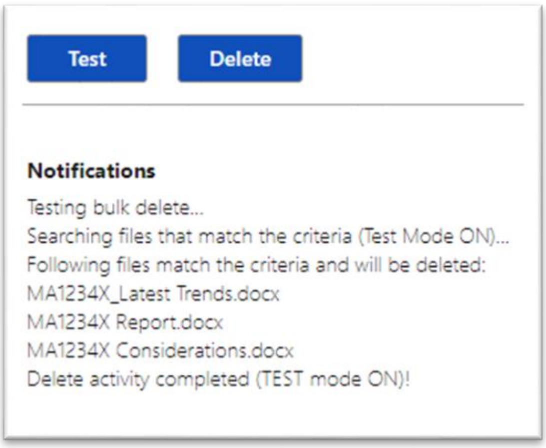
5. Once **File Type** is selected, you can also include **Start Date** and **End Date**. These narrow down the search to files modified within a certain time period.



6. Note that you can always click **Cancel Process** to end the bulk delete process.



7. Once the settings are confirmed, click the blue **Test** button. If the test is successful, click **Delete** in blue then **Ok** when prompted to carry out the bulk delete operation.



8. Once the **Bulk Delete** operation completes, it is suggested that you navigate back to the **Managing Agent 001** folder and check that all .docx files have been deleted – in this example, deletion has been completed successfully.