LLOYD'S

Lloyd's SecureShare

User Guide

Contents

Access instructions

Accessing Lloyd's SecureShare

SecureShare is Lloyd's secure platform for sharing files with Market Organisations.

This system is designed to be used with the latest versions of Microsoft Edge or Google Chrome only from desktops or laptops. Access from alternative browsers or devices is not supported.

SecureShare can be accessed at the following URLs:

SecureShare Hub site: https://lloydsoflondon.sharepoint.com/sites/securesharehub

My Access portal: https://myaccess.microsoft.com/@lloydsoflondon.onmicrosoft.com

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

Initial steps

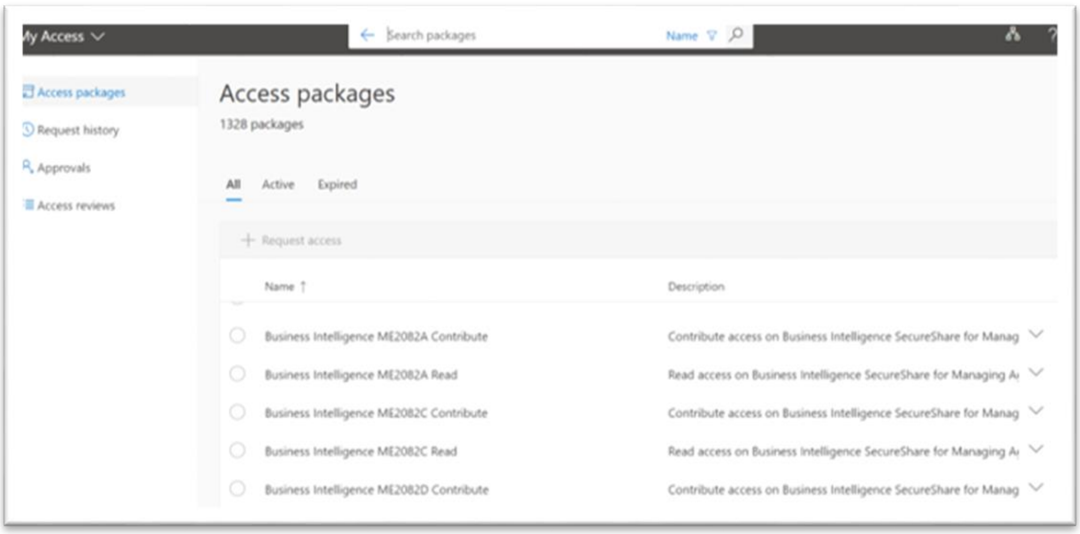
Before you can access the SecureShare Hub, you must request access to at least one site.

Making an access request

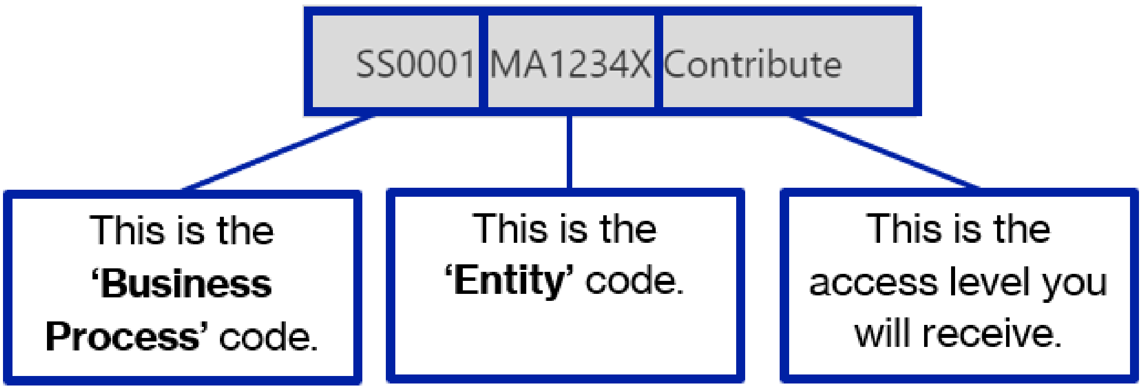
Please note that the following instructions are for Market users only. Lloyd's users should use a SecureShare Access Request Form on MyService to request access.

1. Sign in to the **My Access portal** at https://myaccess.microsoft.com/@lloydsoflondon.onmicrosoft.com – 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.

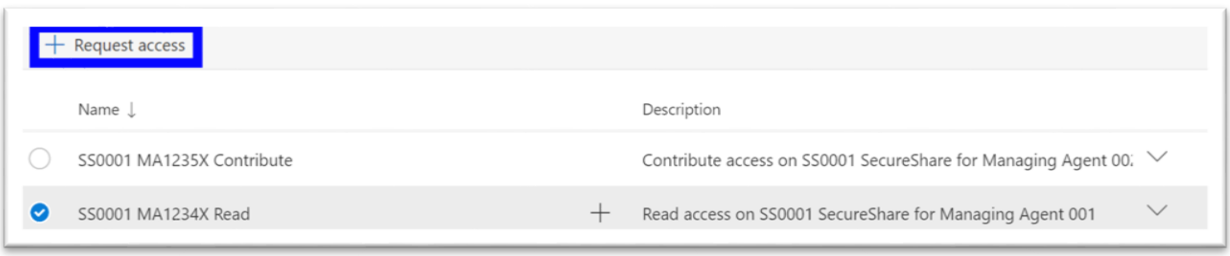


The annotation below shows how site naming conventions work within Lloyd's SecureShare.

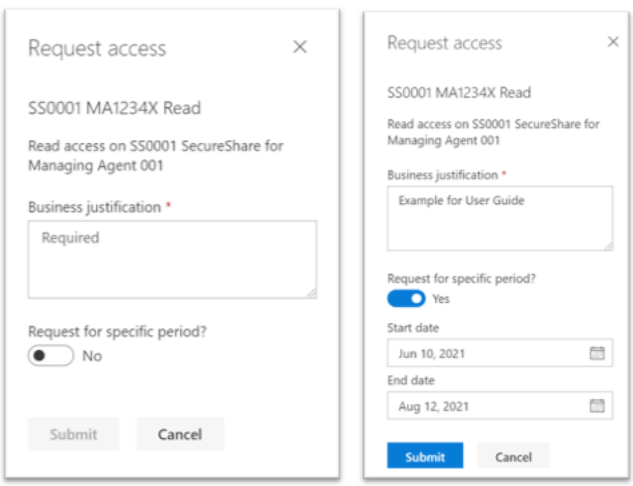


3. Once you have identified the site you require in the **My Access portal**, click onto it.

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



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



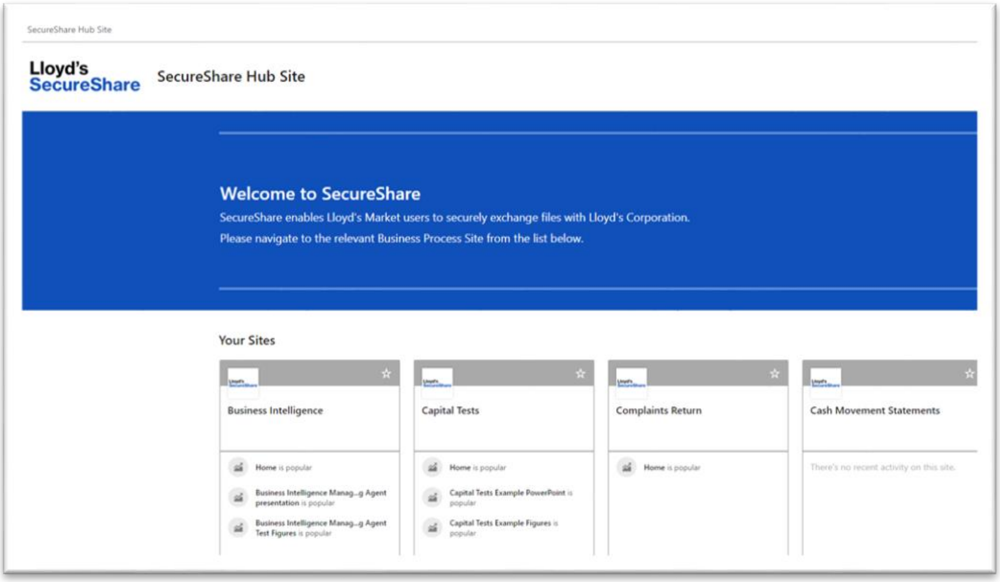
6. You then click **Submit** to complete the approval request.

7. The nominated devolved administrators at your organisation will be notified by email of your access request. A devolved administrator must approve your access request before you are allowed to access a SecureShare site.
8. Once your request has been approved, you will be notified by email.

Note that emails will be sent from azure-noreply@microsoft.com. Please check your junk folder if you do not receive an email.

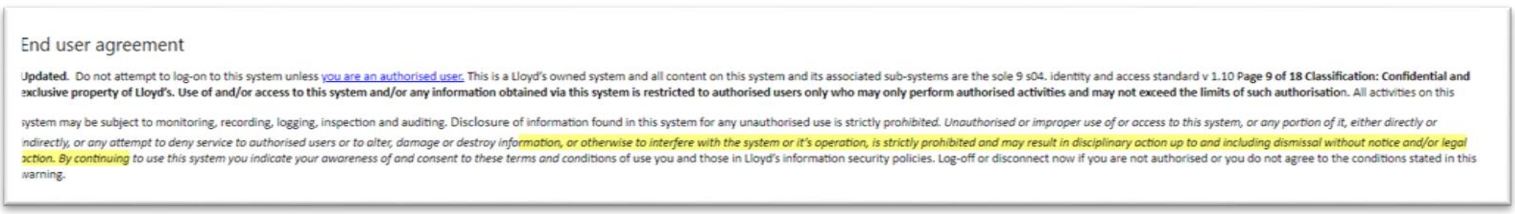
Accessing sites

1. Once access has been granted, sign in to the **SecureShare Hub site** at https://lloydsoflondon.sharepoint.com/sites/securesharehub

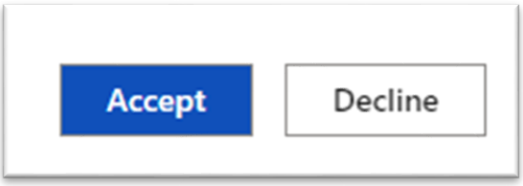


2. Upon entering the **SecureShare Hub site** for the first time, users will be requested to accept or decline the End User Agreement for the site.

   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.



3. 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.



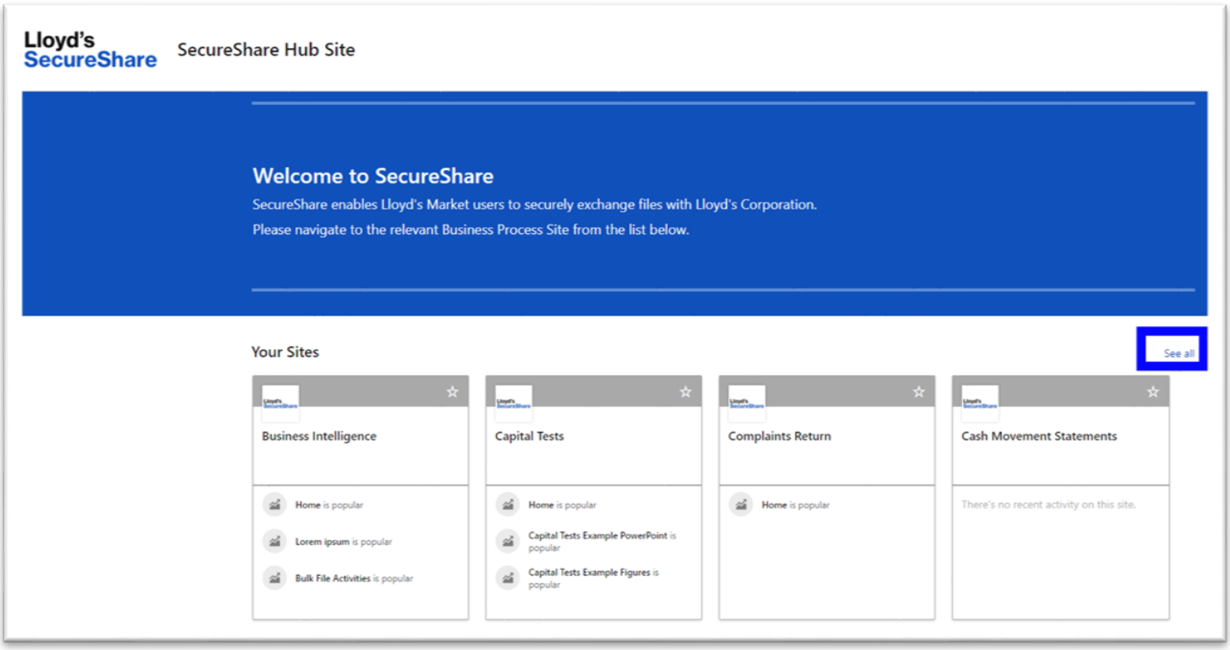
4. Once accepted, you can begin using SecureShare. Please read the following sections for more information on how to use the various features of SecureShare.

Essential site functionality

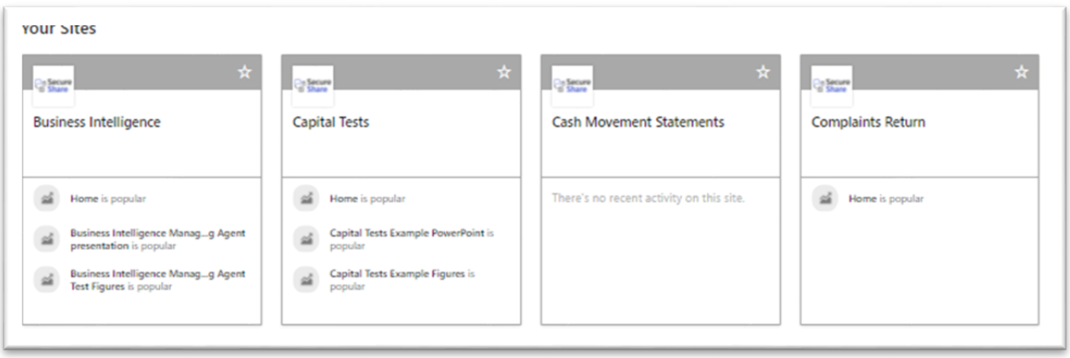
Navigating SecureShare

1. Sign in to the **SecureShare Hub site** at https://lloydsoflondon.sharepoint.com/sites/securesharehub

2. Once you have logged in, 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 the sites you have access to, select **See all.**

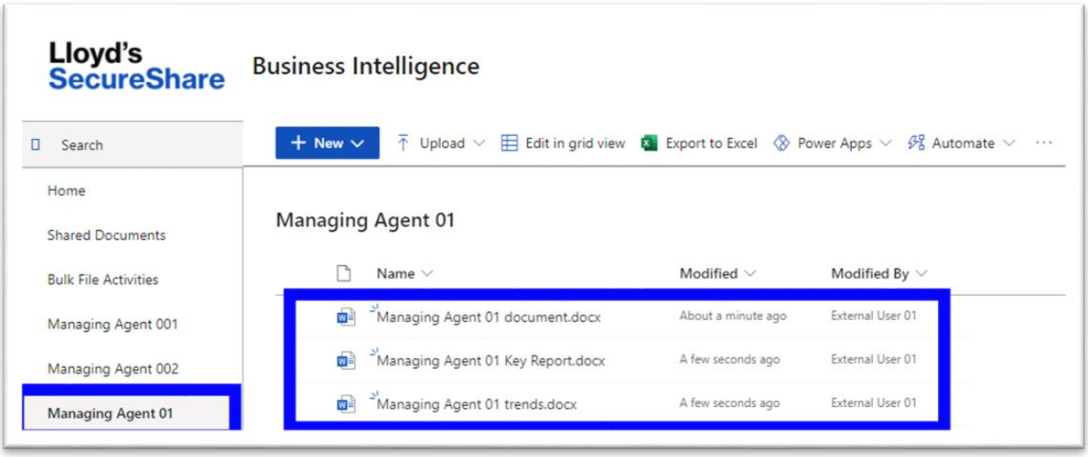


3. From this view, you can click any of the site panels listed in **Your Sites** to enter the Business Process site.

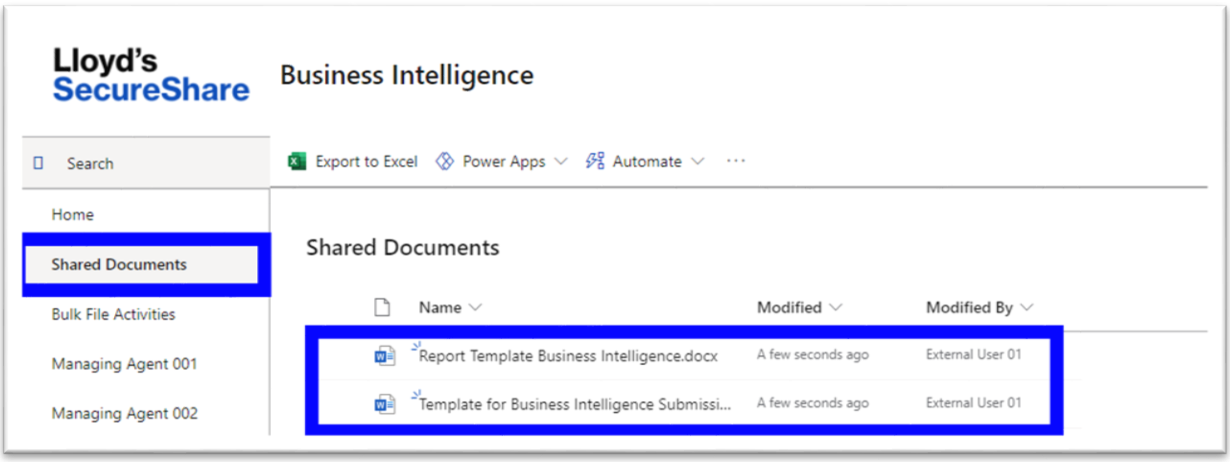


4. On the homepage of each site you will see a personalised list of documents that have recently been uploaded that you have access to. On the left-hand menu, you can see a list of document libraries that you have access to.

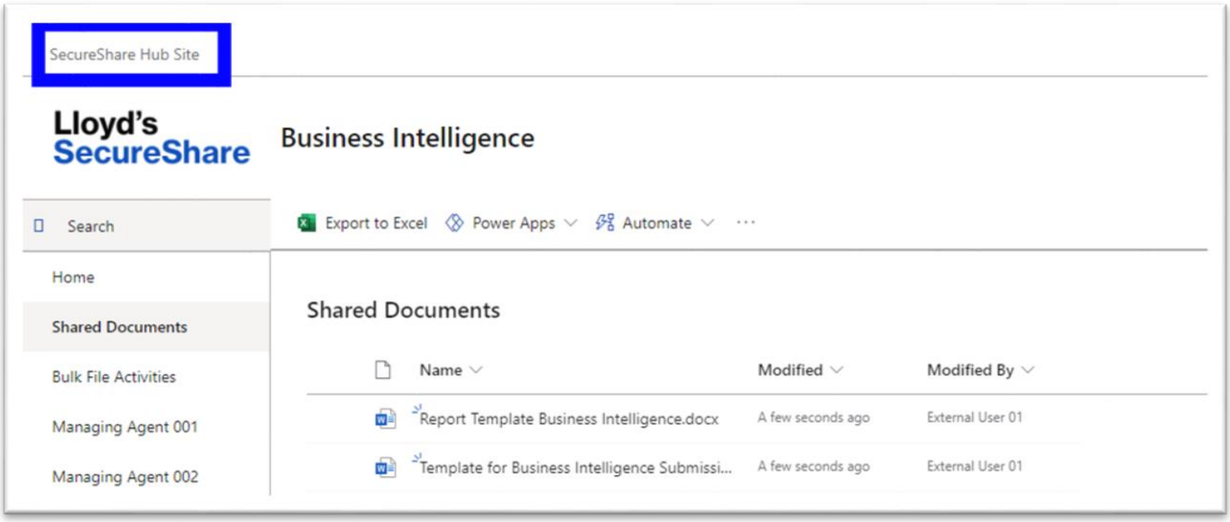
5. You can click on these links to see the documents within. In this case, you then click on the entity **Managing Agent 01**. Within your library you can then upload, edit or delete existing documents (see later sections).



6. The "Shared Documents" library is a library that is used to share documents and templates with all organisations. As a market user you will have read only access to this, a Lloyd's user will have Contributor access.



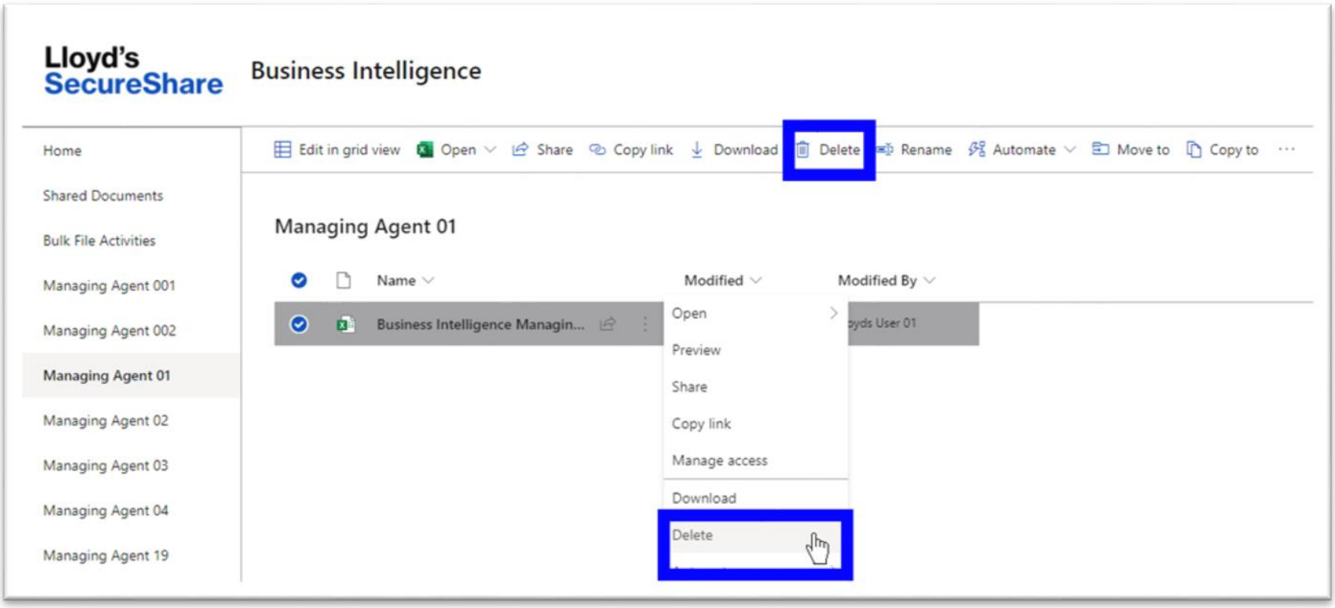
7. You can return back to the home page by clicking on **SecureShare Hub Site** at the top left-hand side of the screen.



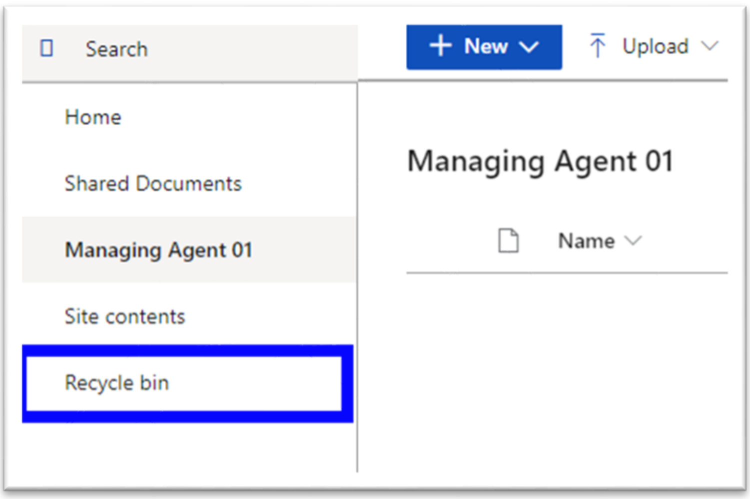
Using the Recycle Bin

The Recycle bin is a temporary location where files are sent after being deleted.

1. 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**.

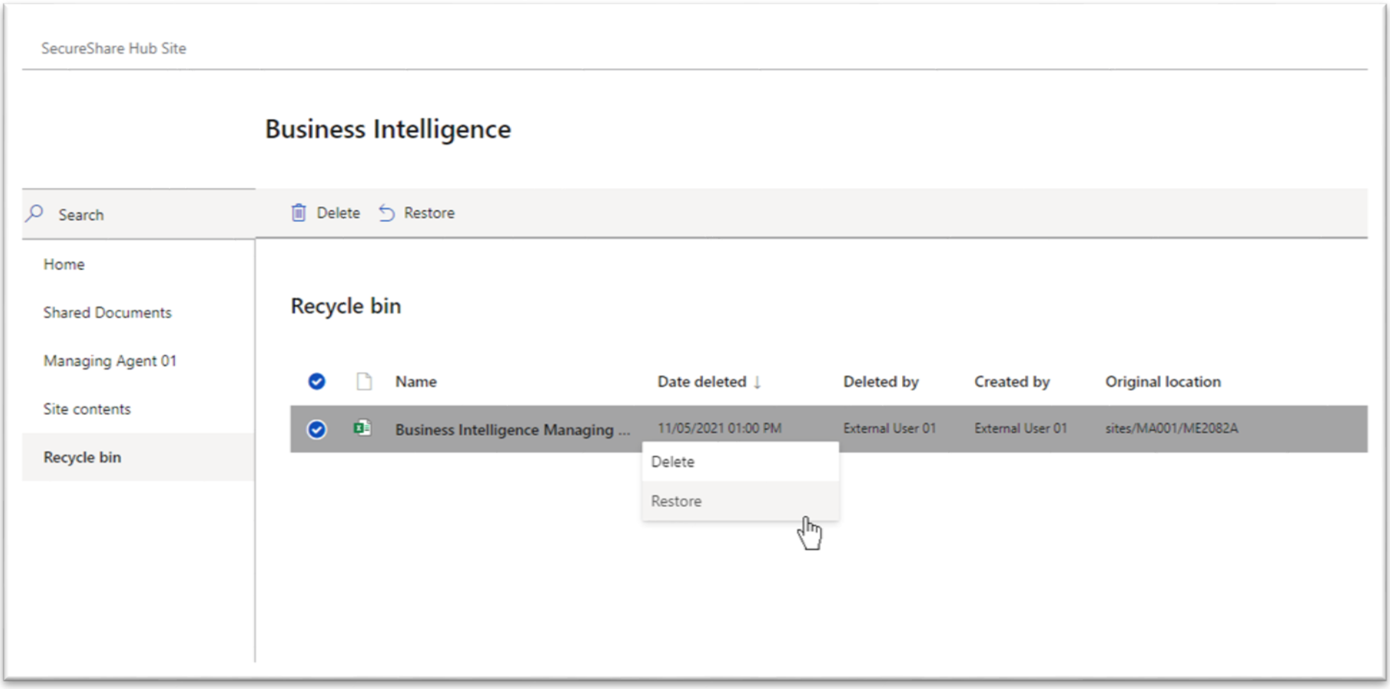


2. Once the document is deleted, I click **Recycle Bin** on the left-hand menu.



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.

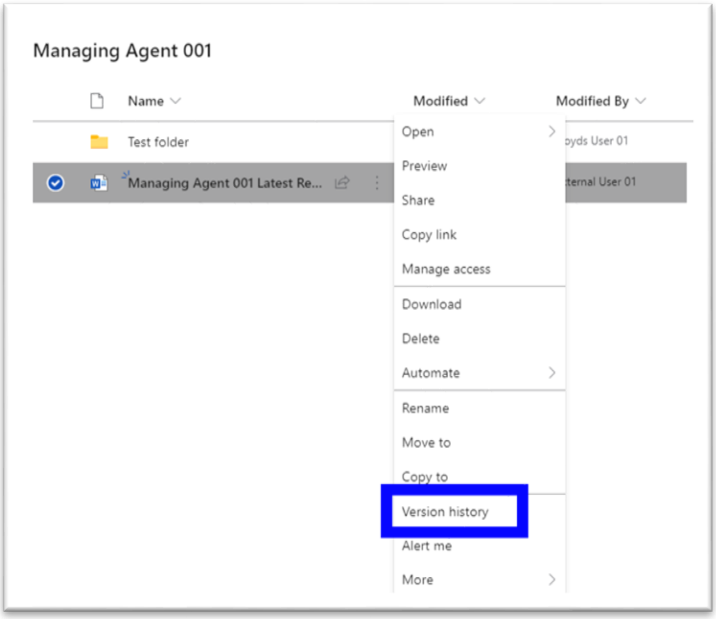
   If required, you can click **Restore** to restore the document back into the original library, or you can click **Delete** to permanently delete the file. This can be done by selecting the document and selecting the option from the top toolbar or the select actions drop down.



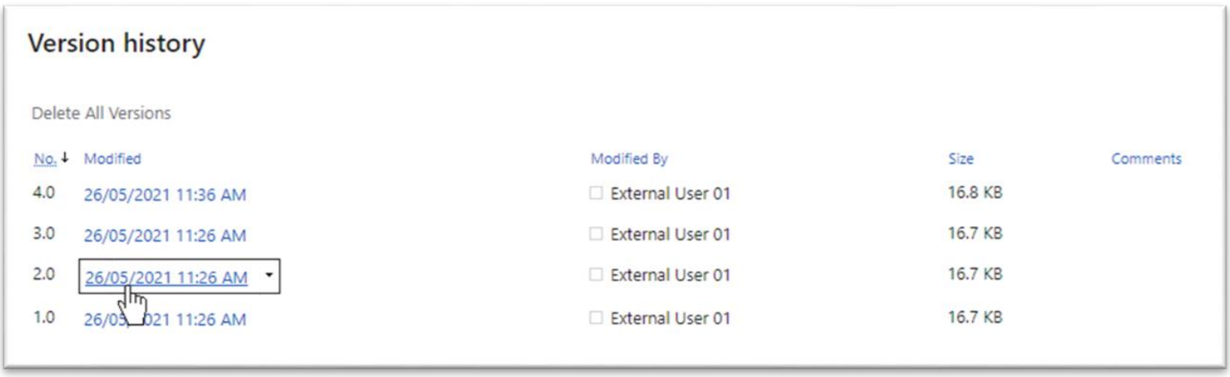
Using version control

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

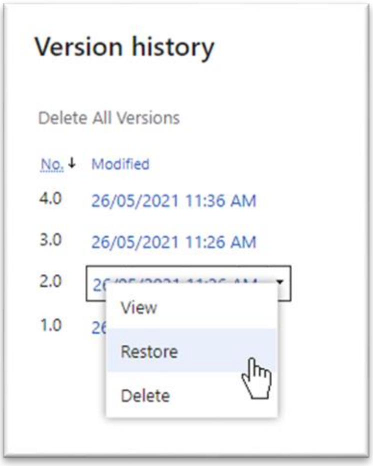
   To do so, right click on a file and then click on **Version History**.



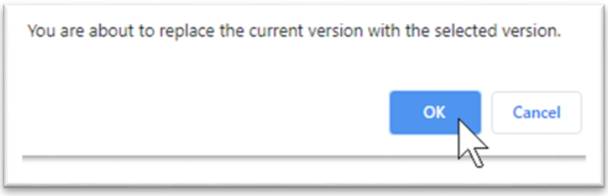
2. You will then see a view of all previous versions. To view a previous version, click onto the document link.



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**.

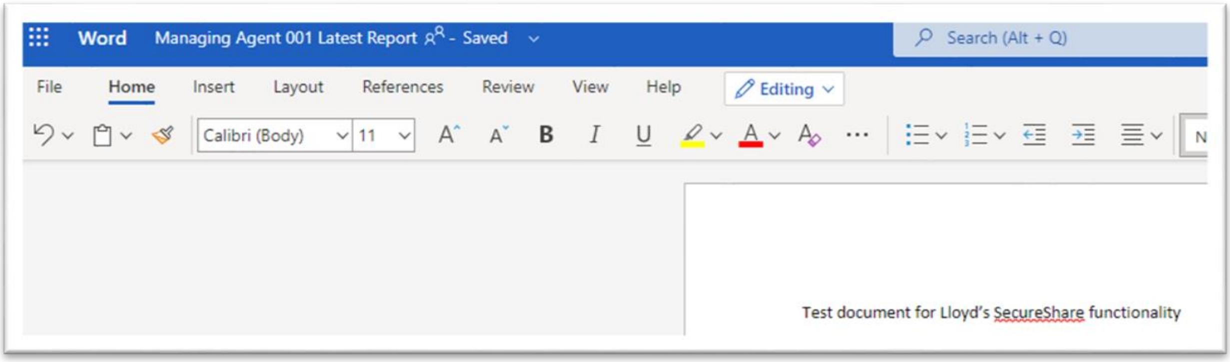


4. Click **Ok** to enact the change.

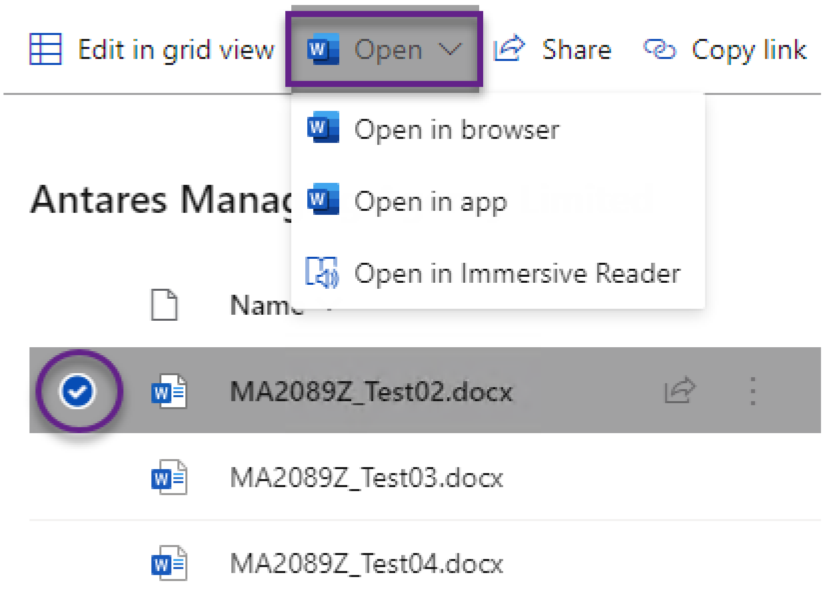


Opening desktop application versions of documents

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. If you have the desktop version of Office 365 installed, you can also open directly in the application.

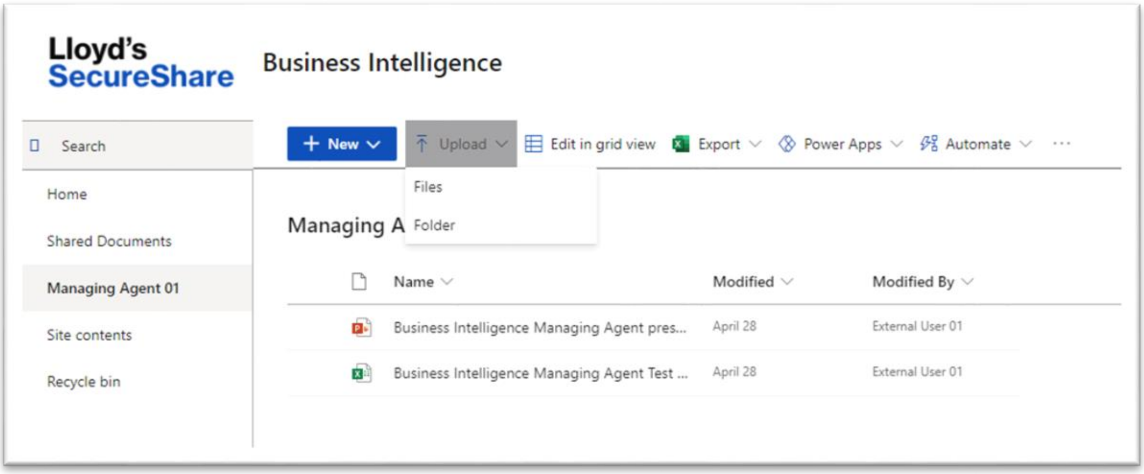


Uploading and downloading documents

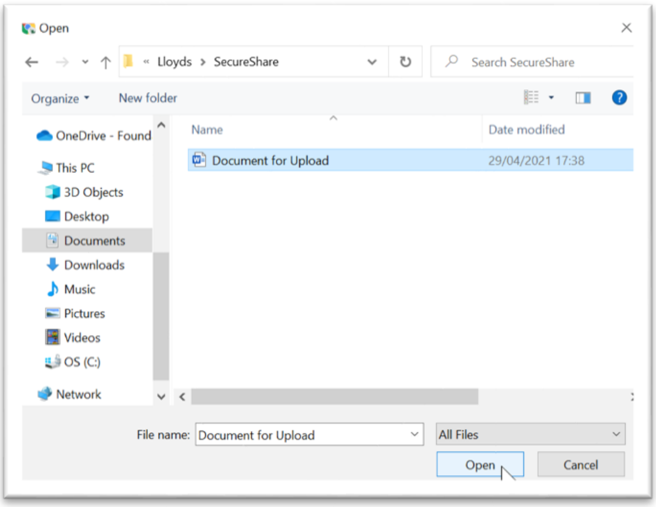
Uploading documents

1. Navigate into a Site and Library you have access to
   *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**.



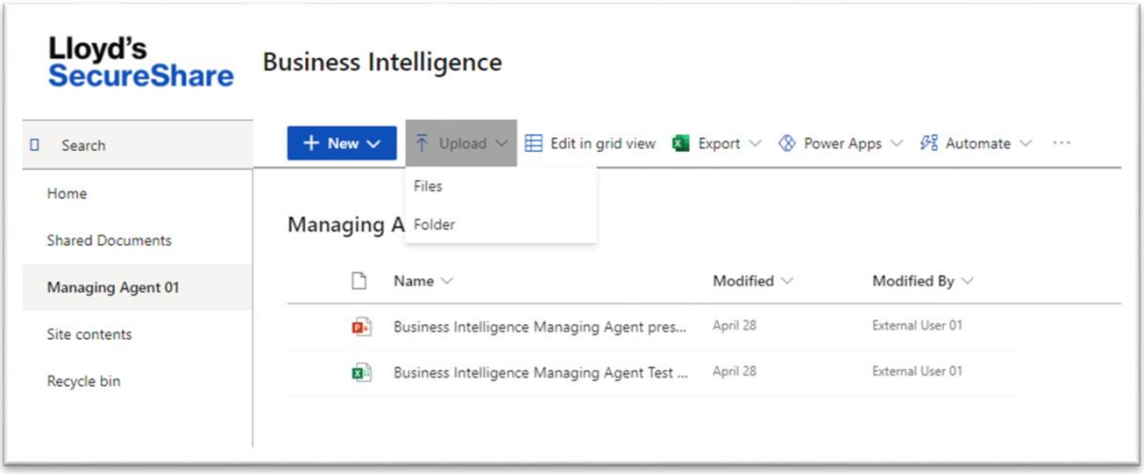
3. In the resulting File Explorer menus, select the file you wish to upload then click **Open** to complete the download process.



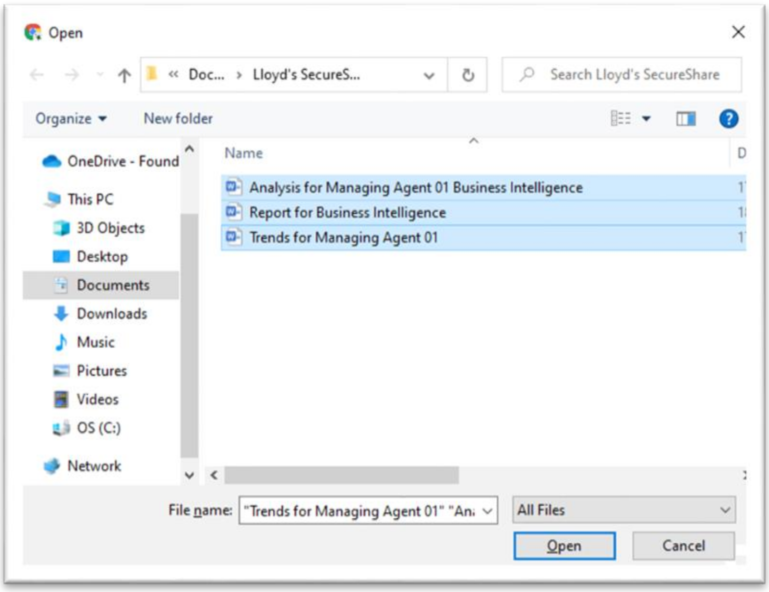
Uploading multiple files

1. Navigate into a Site and Library you have access to
   *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**.

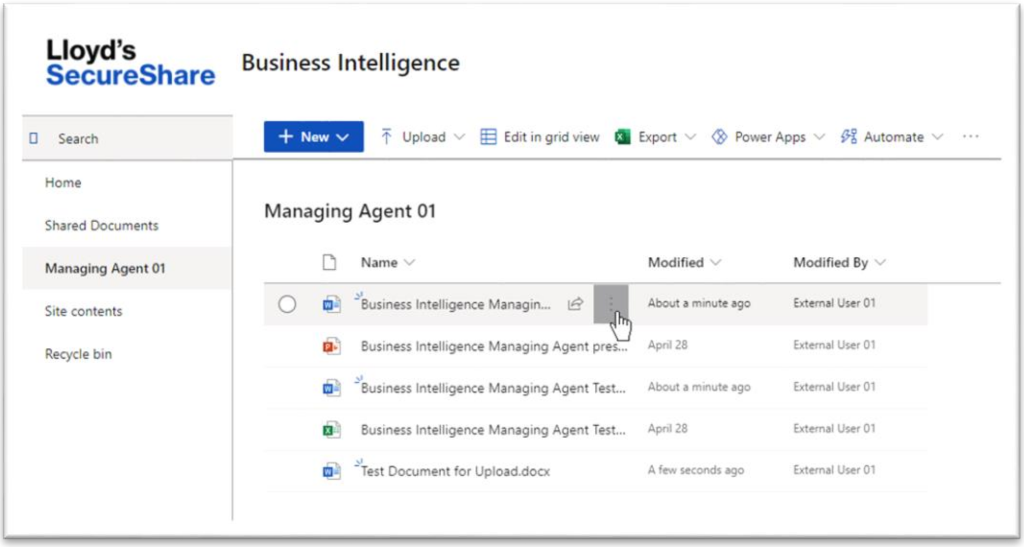


3. To select multiple files within a view on File Explorer, hold the SHIFT button on your keyboard and click onto all the files you wish to upload. Click **Open** to complete upload.

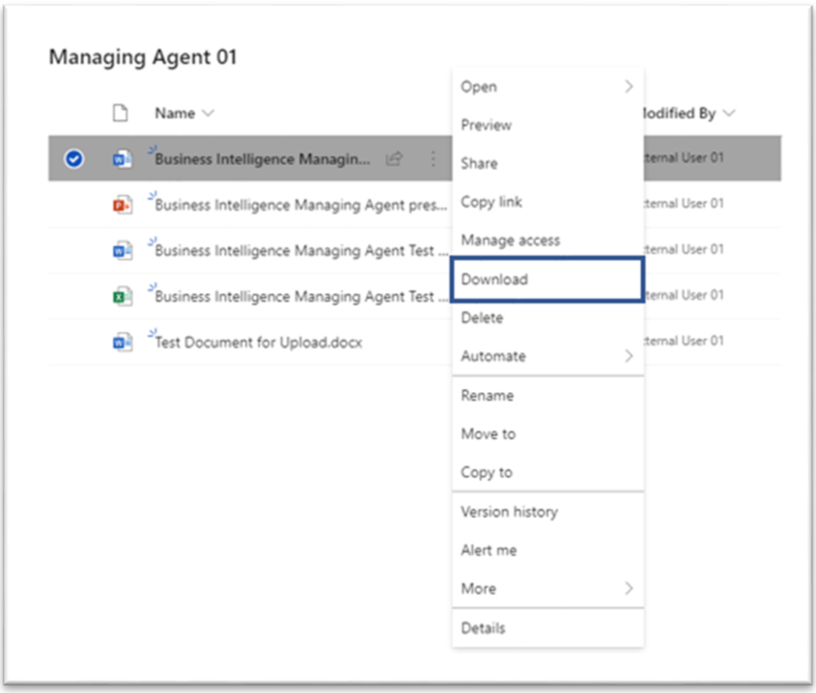


Downloading documents

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.



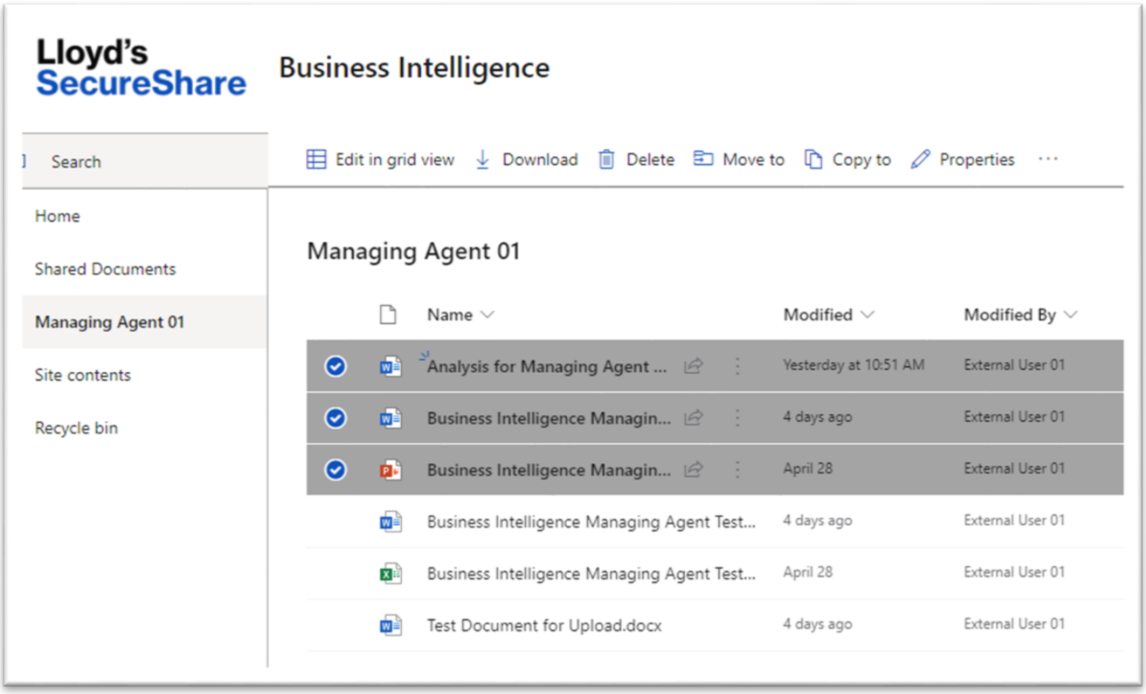
3. In the following drop-down list, click **Download**.



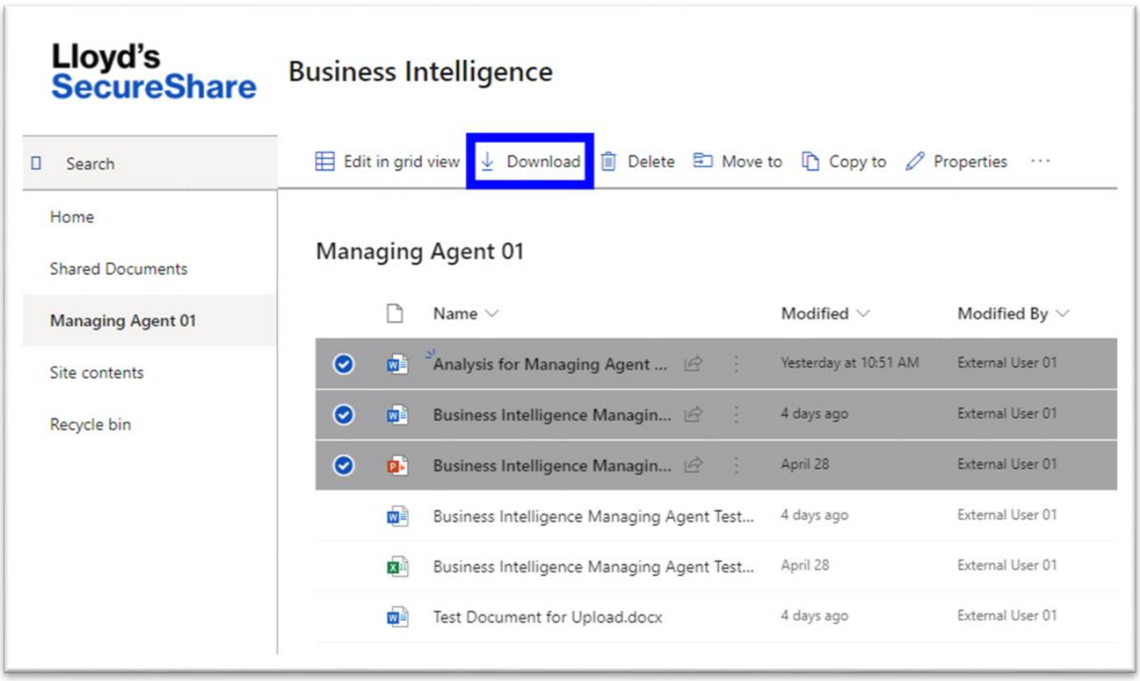
Downloading multiple files

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.

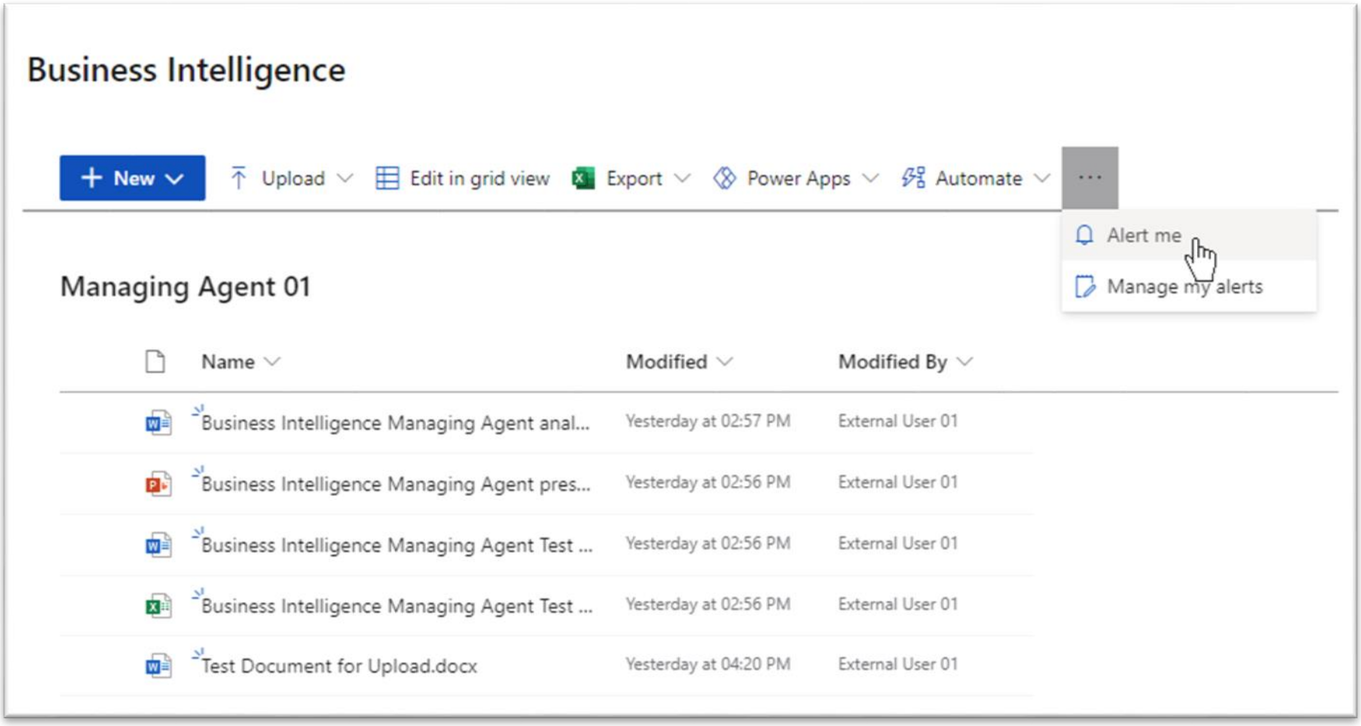


Creating and managing alerts

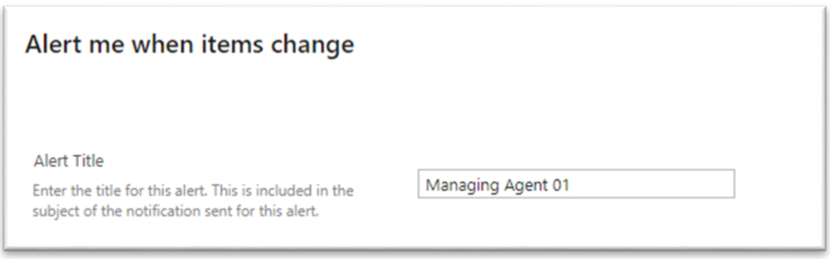
Creating alerts

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

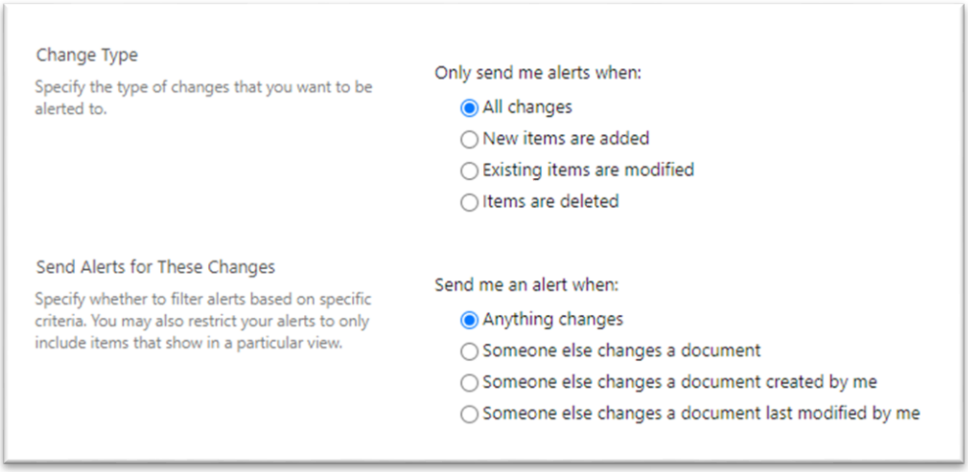
2. Click the ellipses to the right of **Automate** and click **Alert me**.



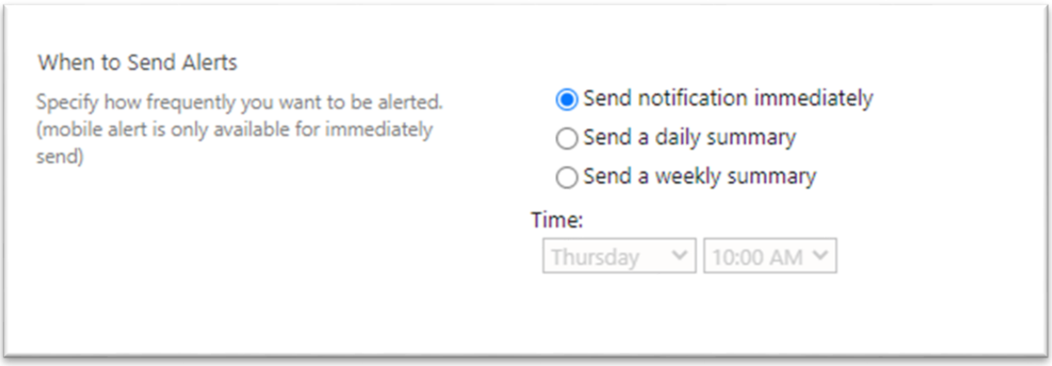
3. On the following screen, write an **alert title** in the text box given.



4. 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.



5. 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.

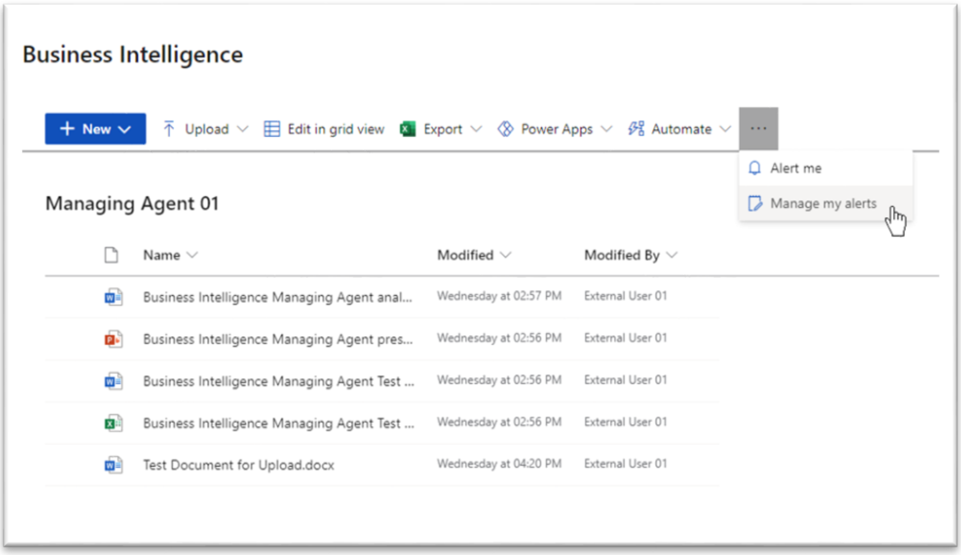


6. Click **Ok** to complete alert setup.

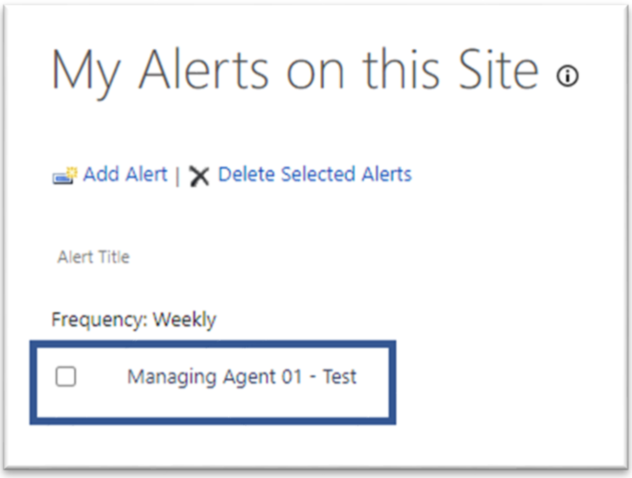
Editing alerts

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

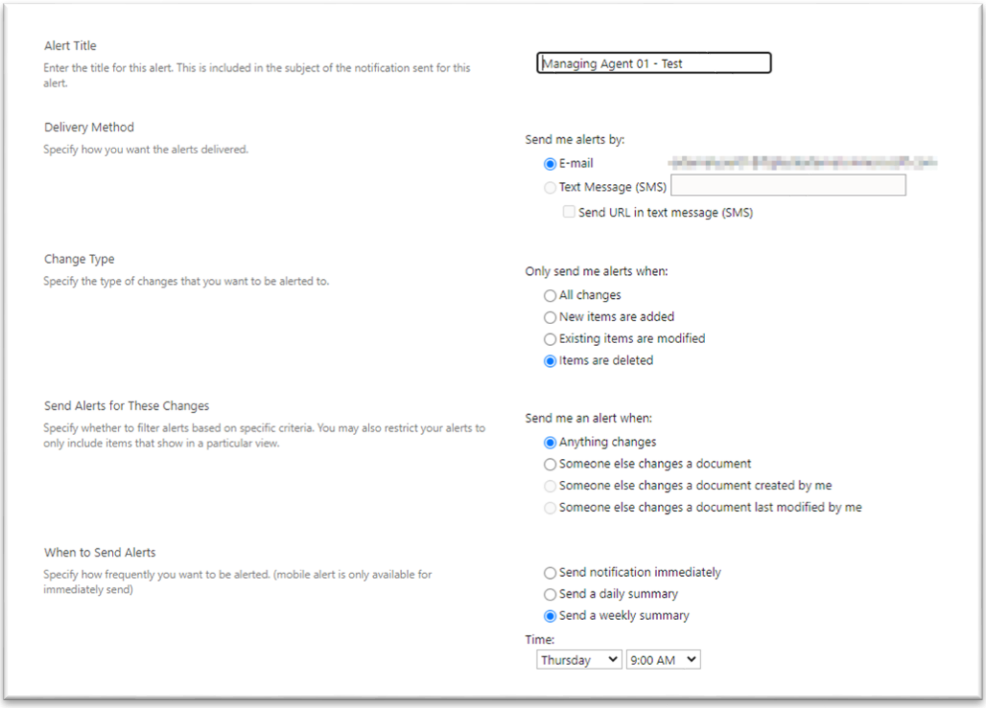
2. Click the ellipses to the right of **Automate** and click **Manage my alerts**.



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**.

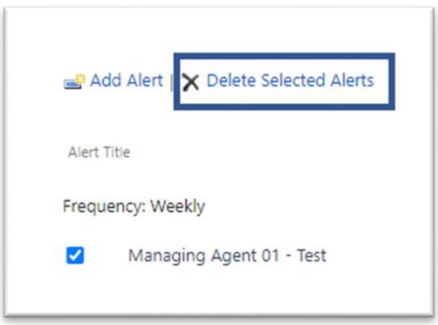


5. Once required changes have been made, click **OK** to save changes.

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**.



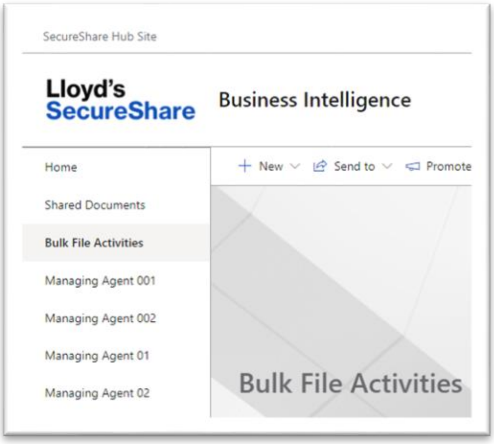
3. Click **Ok** when prompted.

The Bulk Upload Process

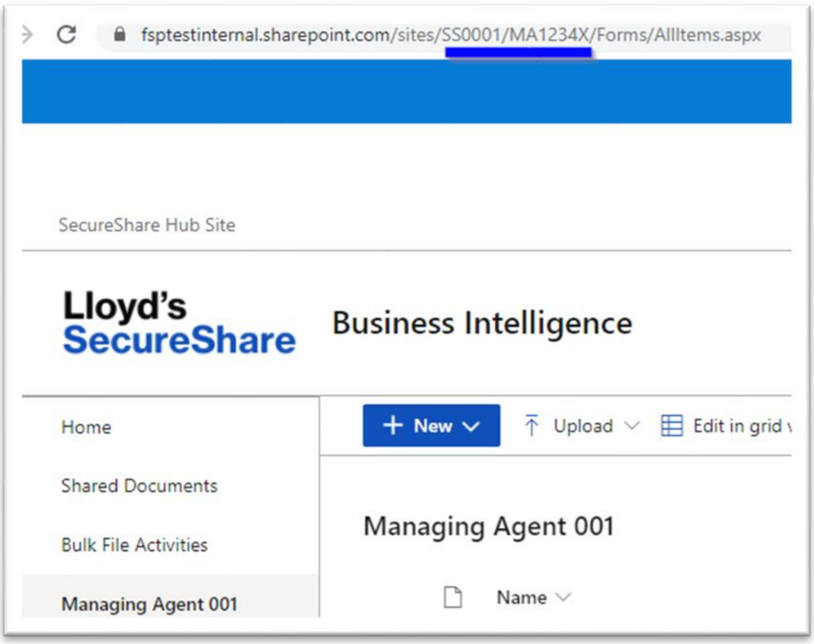
Please note that Bulk Operations processes are restricted to Lloyd's users only.

Uploading files to multiple libraries

1. Navigate into a SecureShare you already have access to.

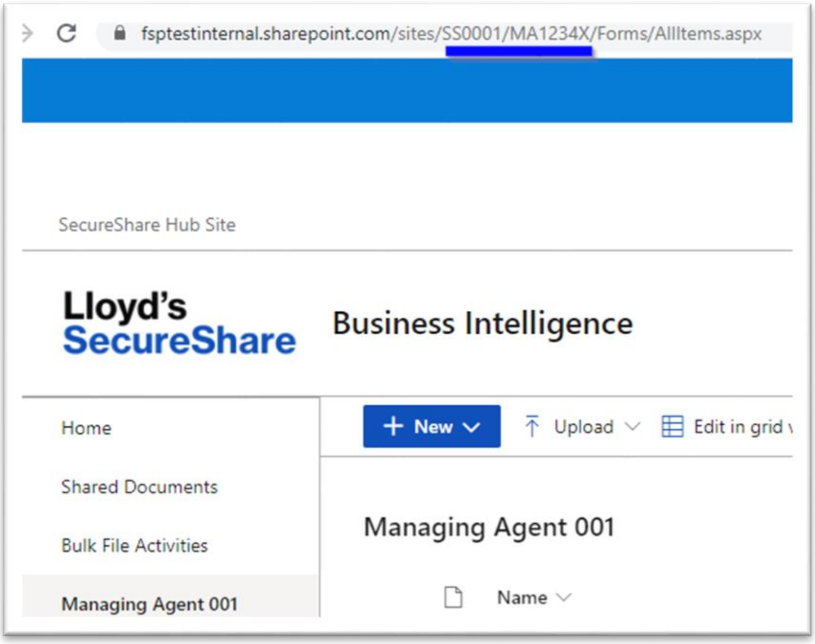


2. Click on the Bulk File Activities link to launch the Bulk Activities tools



3. Take a note of the Site Code of your site

   In this example SS0001 is the site code this site

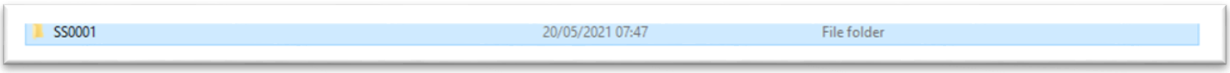


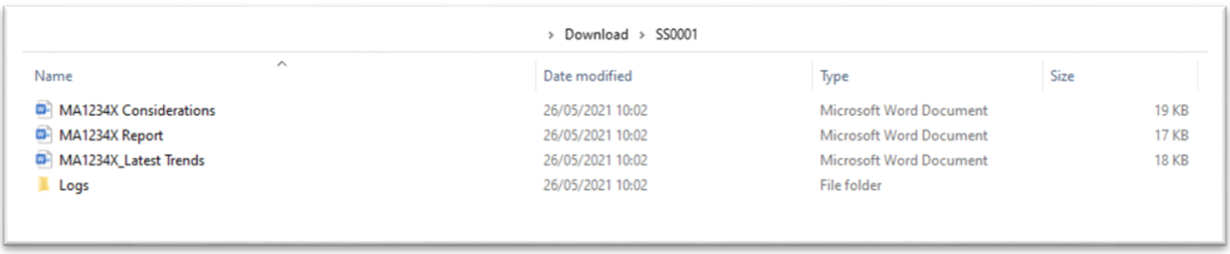
4. Navigate into the SecureShare staging location link or mapped drive provided by Group Technology.

Within this area you will see a Download and an Upload folder.

Within the Upload folder there will be a folder matching the site code for your site.

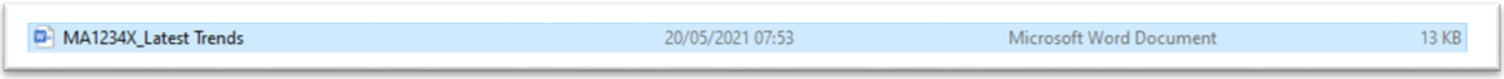
This is the folder where you need to place files for uploading.





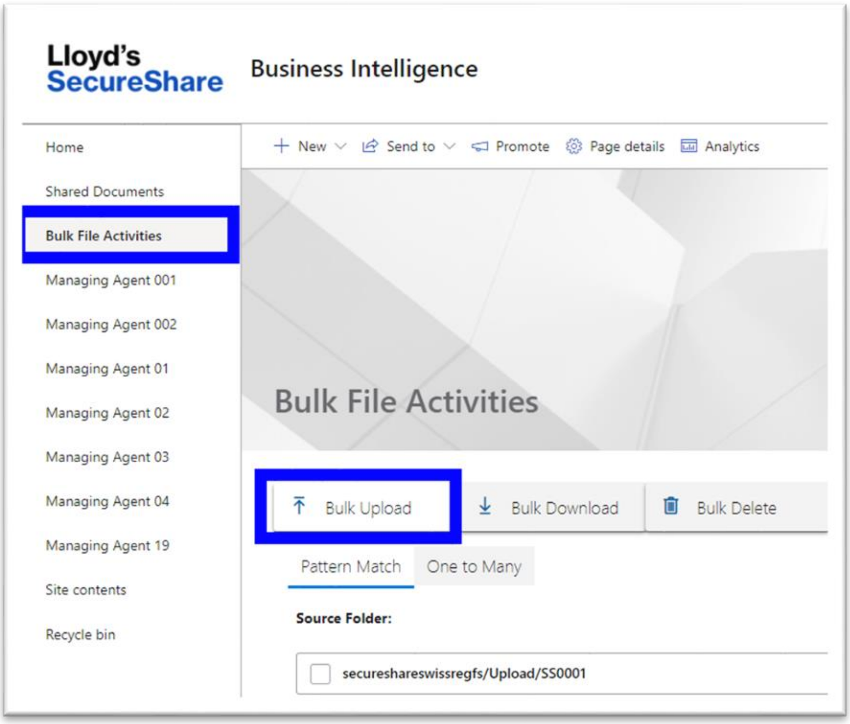
5. Prepare your files so that any Syndicate or Managing Agent specific files have the entity code appended at the start of the filename.

In this example this file will be uploaded to the Managing Agent MA1234X library. The Entity code can be seen in the library URL or from the Market Entity

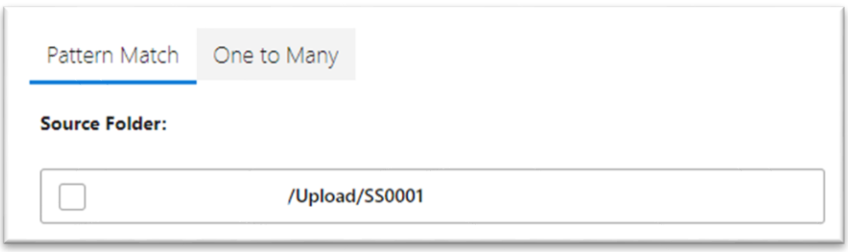


Database (MED).

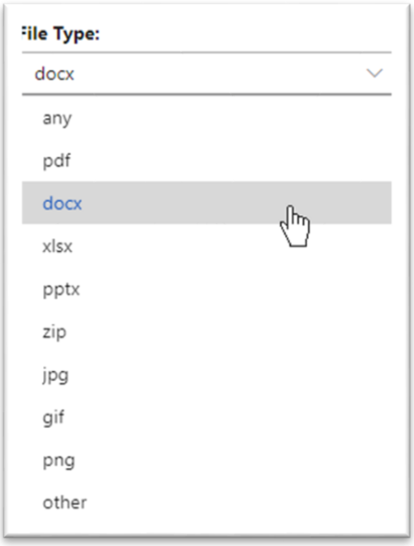
6. Once your files are correctly named, return to the Bulk Upload screen. Refresh your browser to ensure your session has not timed out (ctrl + f5)



7. Select the source folder that you will be uploading from. This corresponds to the folder in the staging location you have placed your files into.

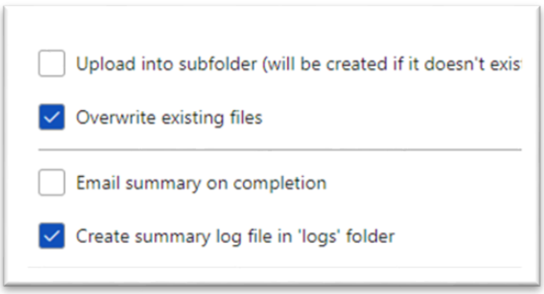


8. Once you have selected a Source Folder, you can apply a filter to select only specific filetypes will be uploaded. The default option is blank which will upload all filetypes



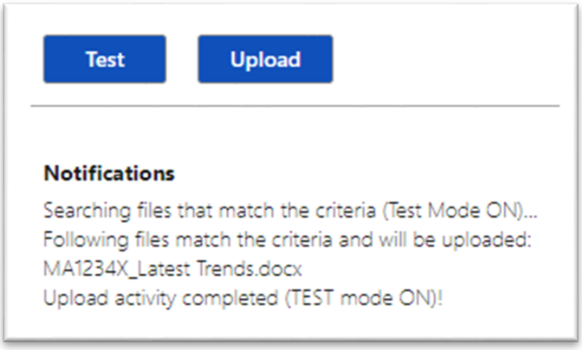
9. The following options are also available:

- **Include subfolders** – this will also upload files contained within subfolders within the upload folder
- **Overwrite existing files –** this will replace existing files
- **Create a summary file file –** this will create a log file of files uploaded within a folder called logs
- **Email summary on completion –** this emails a log of files uploaded to you

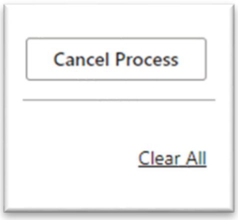


10. Click the **Test** button to validate your setting. The test shows whether documents are found. If successful, the final **Upload** button appears in blue. Click on this to complete the process.

Please note uploading large volume of files can take a long time, please be patient and wait for the messages on the bulk upload screen to confirm the upload was successful.



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

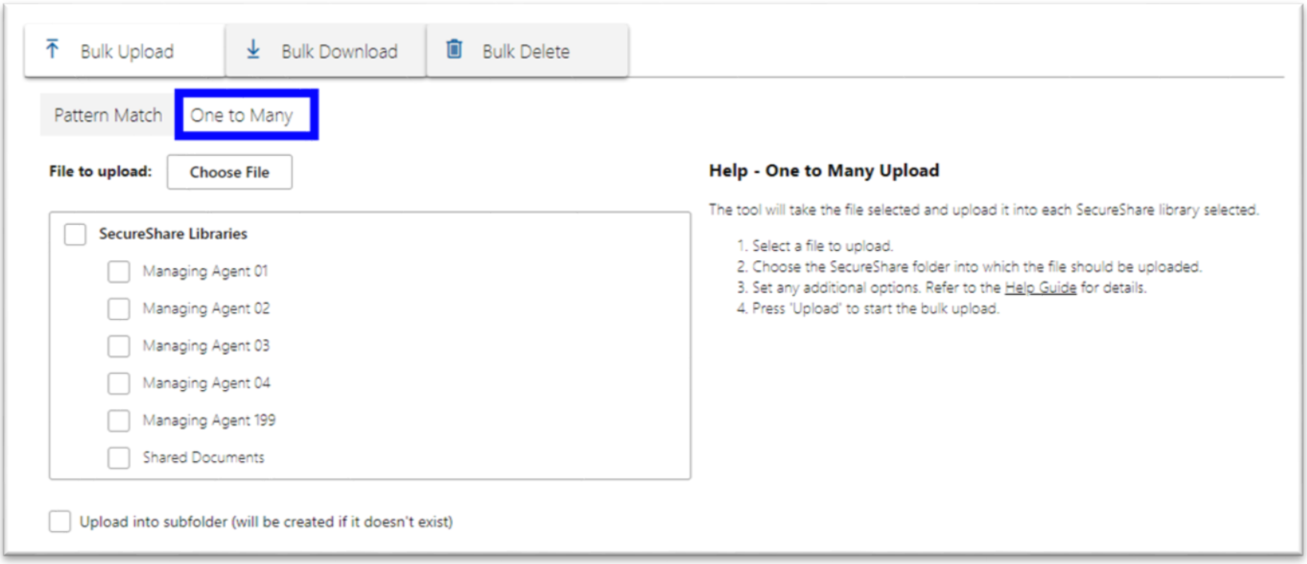


Completing 'One to Many' upload

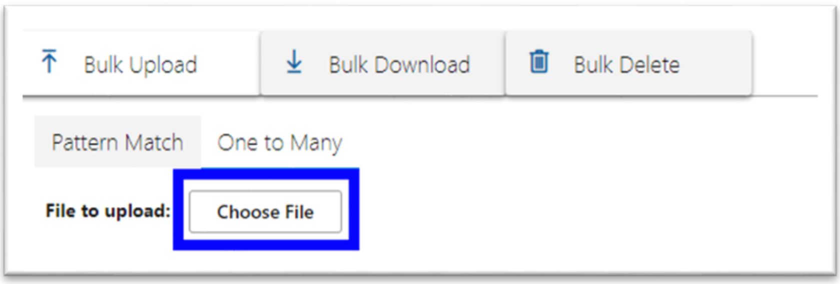
1. Start within the Business Process site you wish to complete an upload for.

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

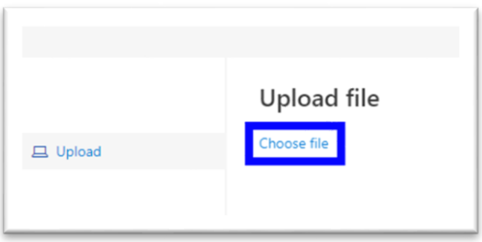
3. Once in the **Bulk Upload** section, click on the **One to Many** option highlighted in the screenshot below.



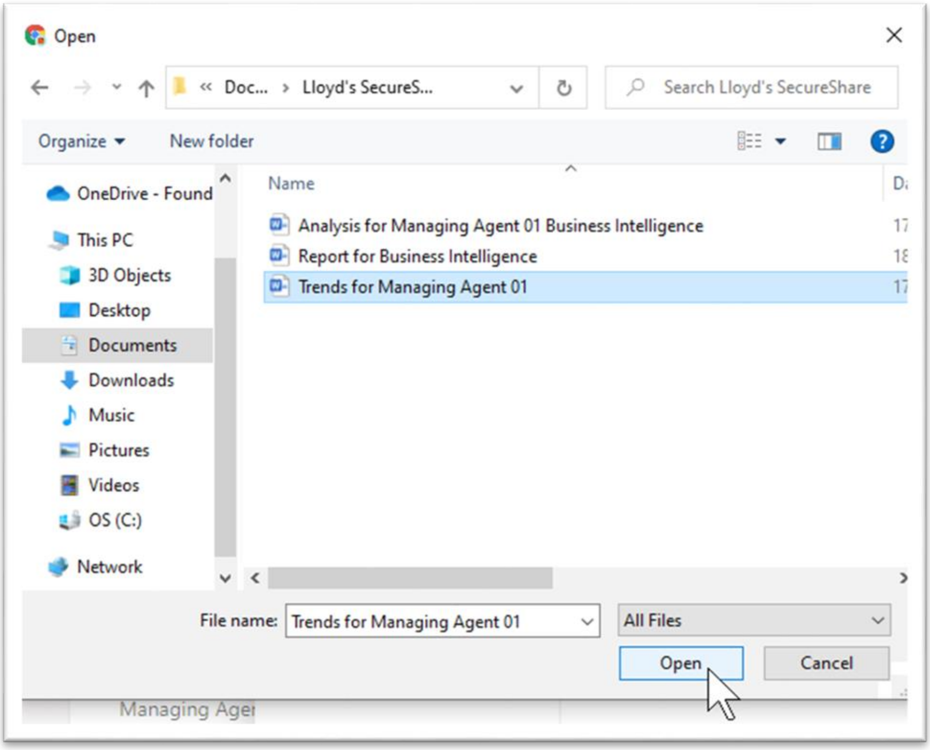
4. In the **One to Many** section, click on the **Choose File** button.



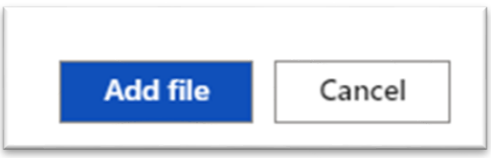
5. In the resulting screen, click **Choose file.**



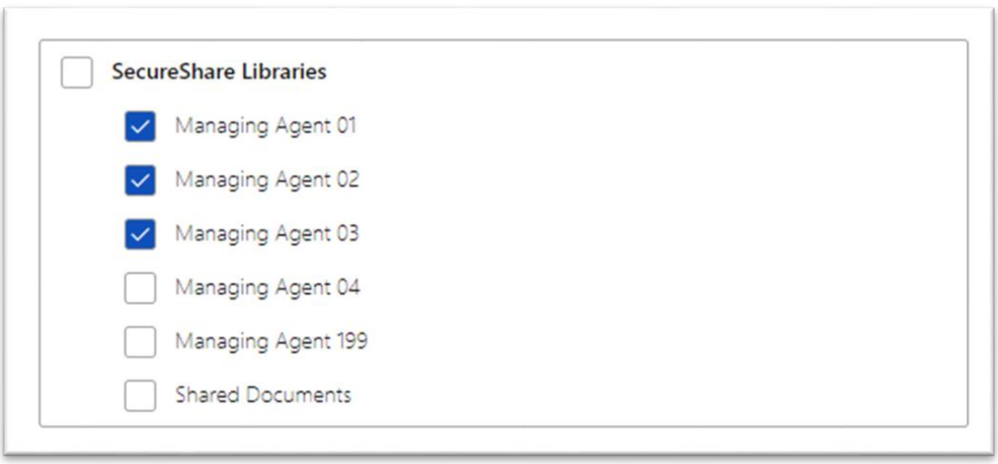
6. Select the appropriate file within File Explorer and click **Open**.



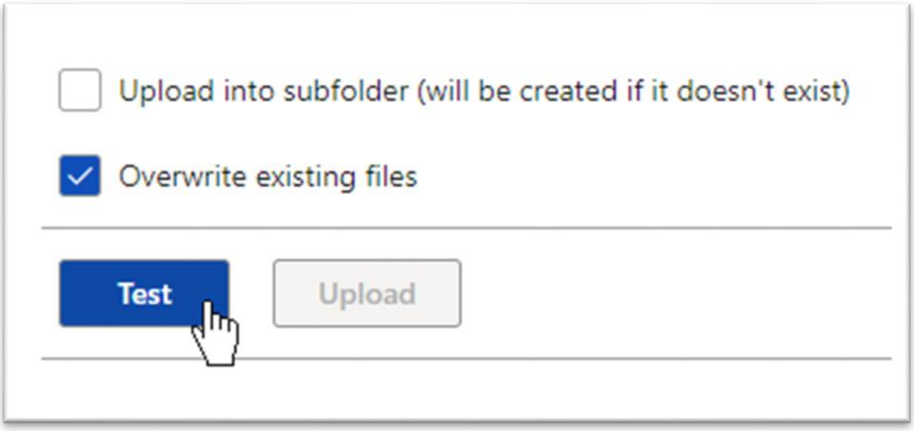
7. Once the file is selected, click **Add file** in the following screen.



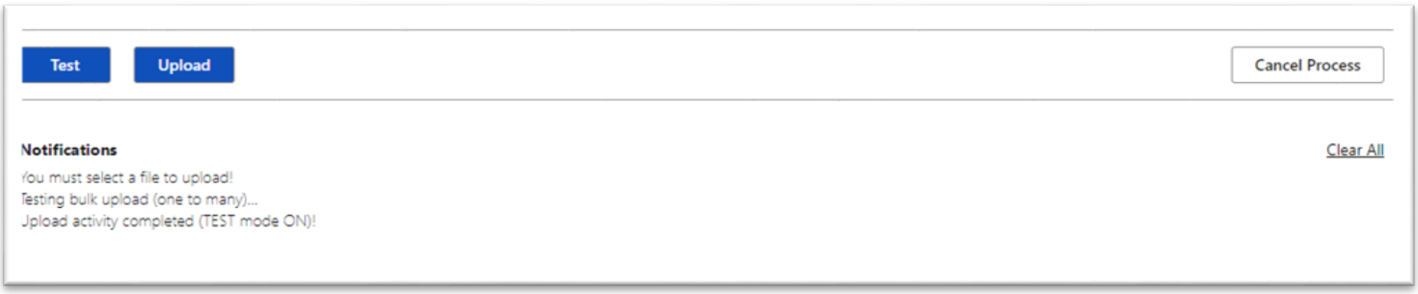
8. Next, click on the libraries you wish to upload the one file to. In the case of the below, Managing Agent 01, Managing Agent 02 and Managing Agent 03 are chosen.



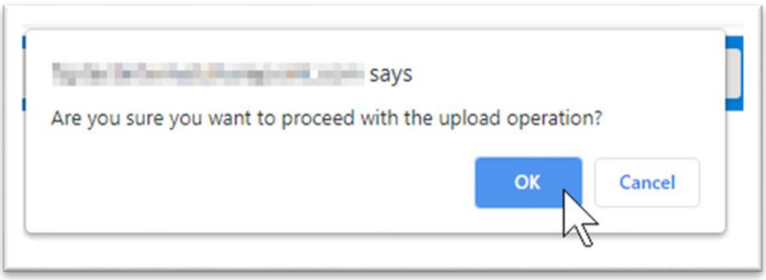
9. Once the libraries are selected, toggle the settings you require below – subfolders can be created within the entities, whilst any duplicate files can be overwritten if required (selected in this case). Once settings are confirmed, click **Test**.



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.



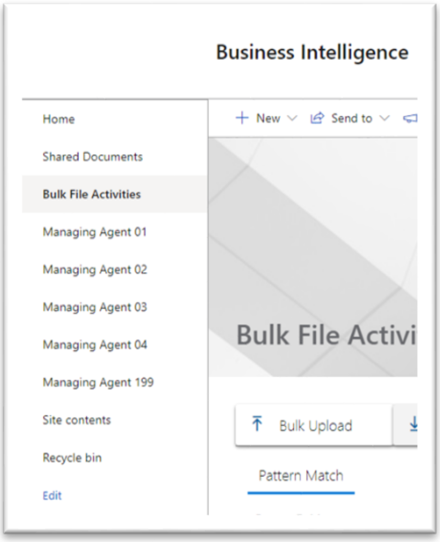
12. The **One to Many** upload process will now have completed, with multiple versions of the same file uploaded to SecureShare libraries.

The Bulk Download Process

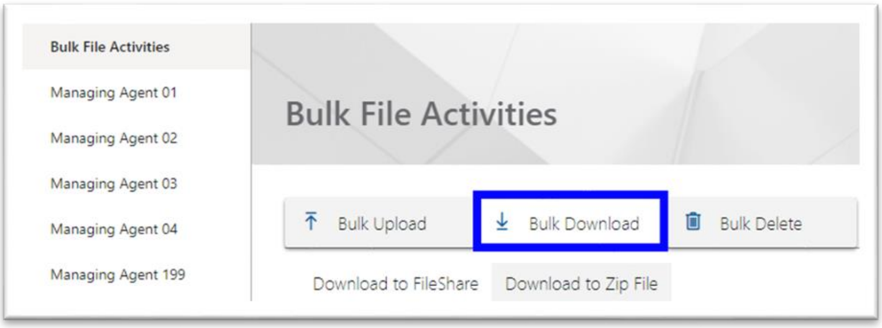
Please note that Bulk Operations processes are restricted to Lloyd's users only.

Downloading from multiple libraries

1. Navigate into a SecureShare site you have already been granted access to.



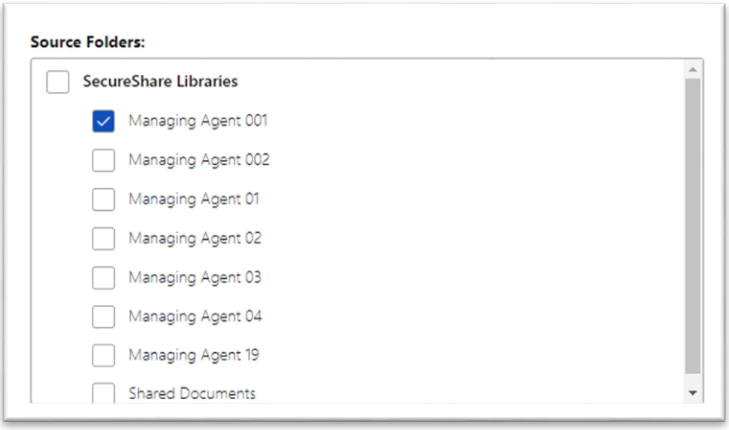
11. Click on Bulk File Activities to launch Bulk Activities tool.
12. Click on the **Bulk Download** tab.



13. The next option is to choose the **Source Folders**.

    These are the document libraries you will be downloading from.
    It is recommended to keep the number of libraries you download from to a minimum to prevent overloading the network (as these requests are sent over the internet to an external network).

    Downloading from all libraries can take a long time depending on the number of files.



14. 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 files starting with certain text, include this before the asterisk.

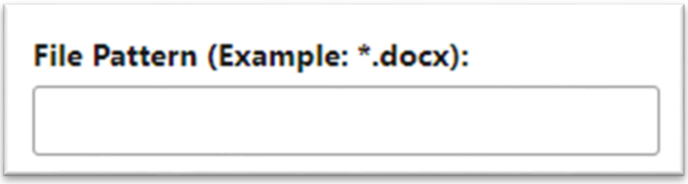
Example – ***MA1234X* searches for any file names starting with MA1234X.***

If you want to search for files ending with certain text, include this after the asterisk.

Example – ****MA1234X.docx searches for any file names ending with MA1234X.docx.***

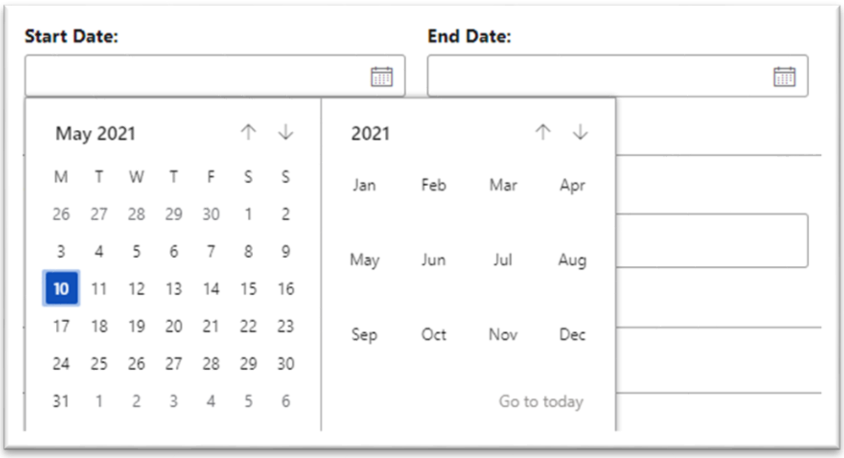
If you want to search for files containing certain text, include this between asterisks.

Example – ****MA1234X* searches for any file names containing MA1234X.***



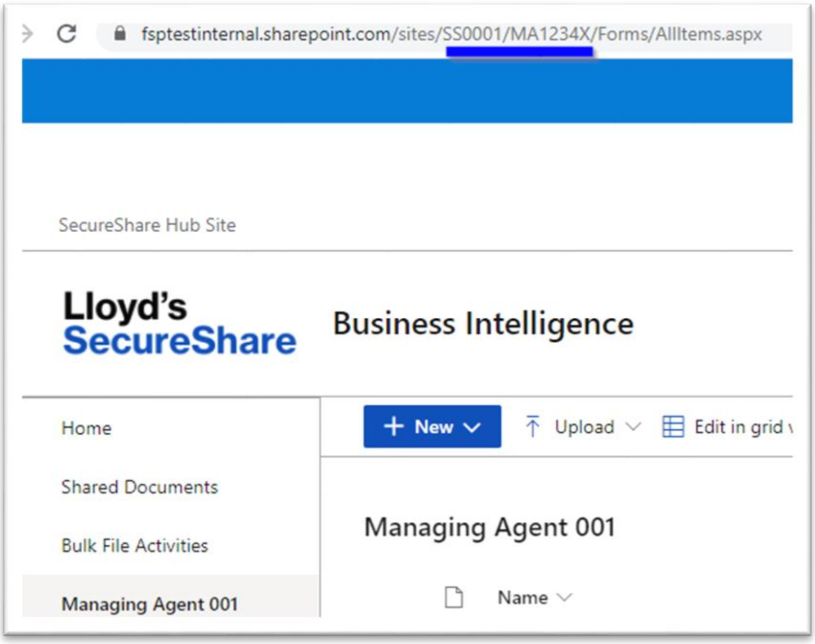
15. Once **File Pattern** has been entered (if required), a specific **File Type** can then be chosen from the drop-down list. If none is selected it will download all filetypes.

16. You can also include **Start Date** and **End Date**. This filters the download so it will only download files modified within a certain time period.



17. 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 folder corresponding to the site code (e.g.: SS0001). You can find the site code for your site by simply looking at the URL:

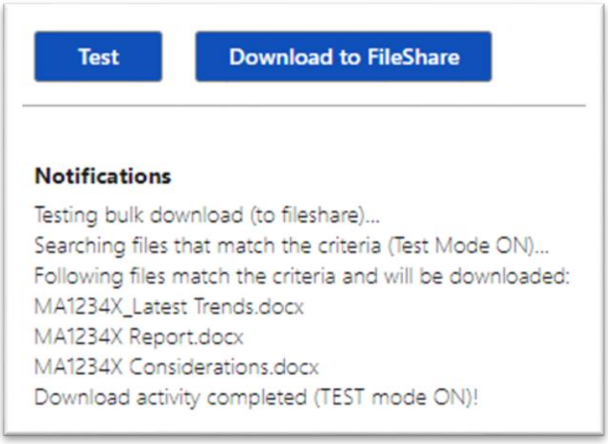
    In this example SS0001 is the site code for the Business Intelligence site



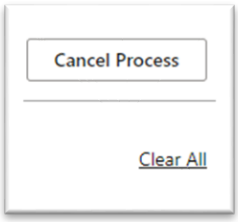
18. You can also select additional settings in this section if required.

    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.
    This is the default setting and it is recommended you leave this on.
    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.

19. Once you are ready, 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.



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



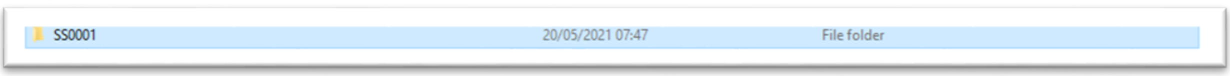
21. You can get to your downloaded files by navigating to the SecureShare fileshare, link provided by Group Technology.

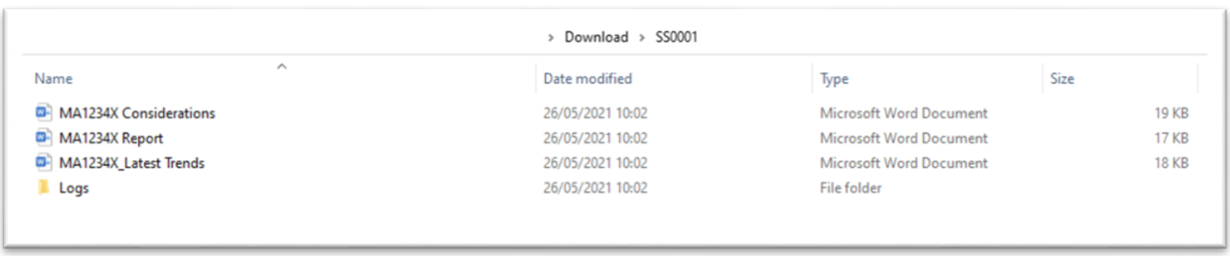
If you do not have access to this fileshare please log a ticket through MyService for access to the SecureShare staging location.

Within this area you will see a Download and an Upload folder.

Within the Download folder there will be a folder matching the site code for your site.

Within the site folder you can find downloaded files.





Best practice for bulk downloads

Before downloading files ensure the staging location is empty of existing files, you may see issues if you fail to do this.

Advise your contacts at Managing Agents to append MA codes or Syndicate codes in front of the filenames they upload. This ensure the filenames are unique and will not be overwritten.

Downloading large volumes of files can take a very long time and can overload the network. It is better to download smaller numbers of files and then delete files from SecureShare. Alternatively use the filters to only download what you need.

Once the files are downloaded please ensure you copy them into your normal working fileshare or SharePoint team site.

Do not leave files in the staging area, it is your responsibility to copy them into your working fileshare or team site.

Once files are downloaded from SecureShare delete the original files from your site! It is considered a breach of security policy to leave confidential files on external facing sites longer than required.

The Bulk Delete Process

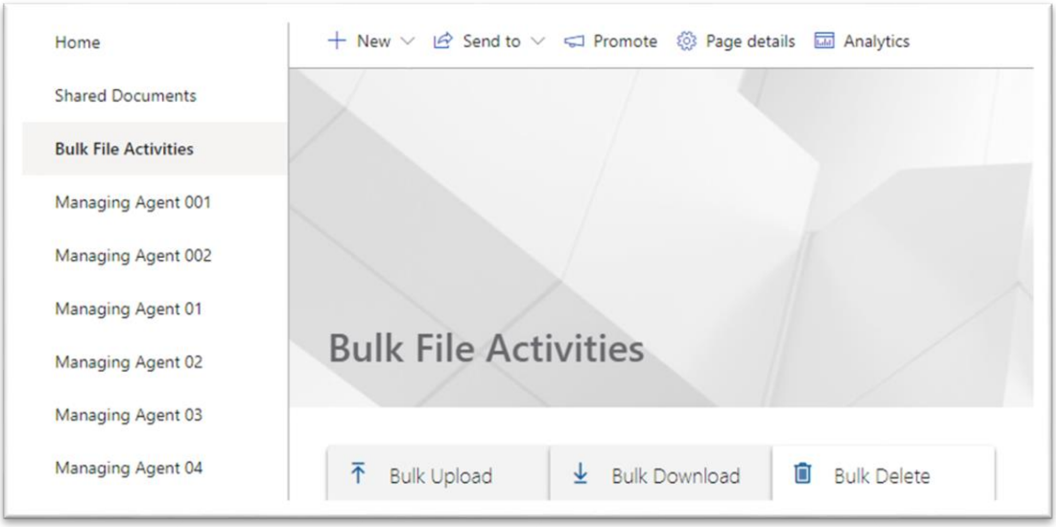
Please note that Bulk Operations processes are restricted to Lloyd's users only.

Deleting files from all libraries

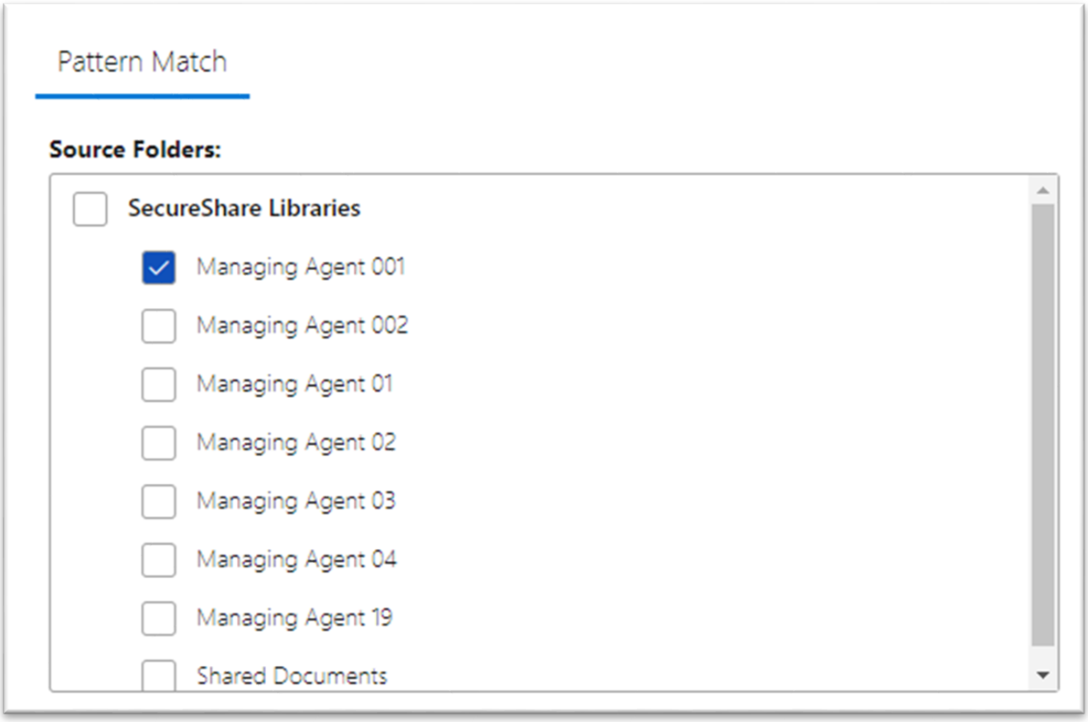
You can use the Bulk Delete process to delete all files easily and conveniently from your SecureShare site once they have been downloaded.

1. Navigate into an existing SecureShare site you have access to.

2. Click on **Bulk File Activities** from the left hand navigation and click on the **Bulk Delete** button.



3. Underneath **Source Folders**, select the libraries you wish to delete from. Check the "SecureShare libraries" to select all libraries



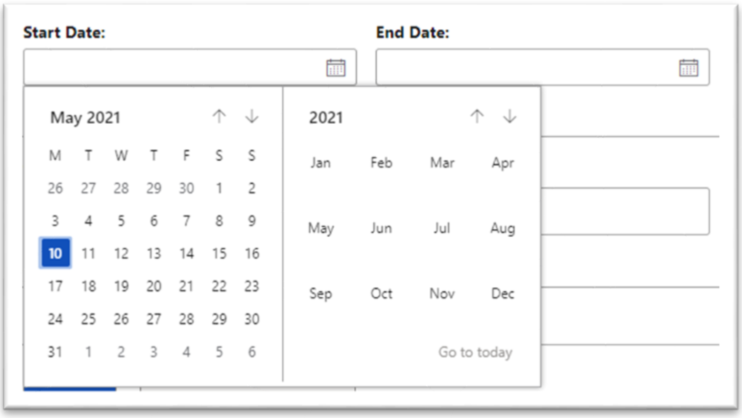
Optionally input a **File Pattern** to only delete certain files if required.

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.

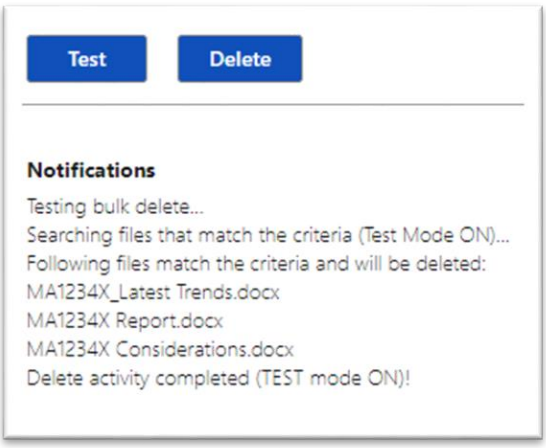
Example – ***MA1234X*.docx* searches for any file names starting with MA1234X in a .docx format.**

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.

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. 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.



7. Once the **Bulk Delete** operation completes, all the selected files will have been deleted