SECURESTORE USER GUIDE

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1 WHAT IS SECURESTORE?

1.1 About SecureStore

Lloyd's SecureStore is a secure web-based facility that allows Lloyd's Market users to exchange files with Lloyd's Corporation users.

SecureStore can be used by the Corporation to distribute files to market users and authorised 3rd parties, and vice-versa.

SecureStore is commonly used to distribute and collect Spreadsheets, CSV files, Word documents, PDF's, Images, Presentations or Zip files amongst other file types (with the exceptions listed in Section 1.5)

Where previously we may have used, for example, CDs, DVDs, or email, Secure Store now provides a single, convenient, secure location, where files can be delivered between the Corporation, the market and 3rd parties.

Please note SecureStore has been designed to work with Microsoft Internet Explorer v7 and above running on Windows PC's. Whilst accessing SecureStore from other browsers, operating systems or devices may also work, not all functionality may be available.

1.2 SecureStore Structure

SecureStore consists of different "Stores", a store contains libraries for each partner (Syndicate, Managing Agent, Members Agent, DCP group etc.) which is where files are uploaded for collection or distribution.

The following diagram illustrates the structure of a typical SecureStore.
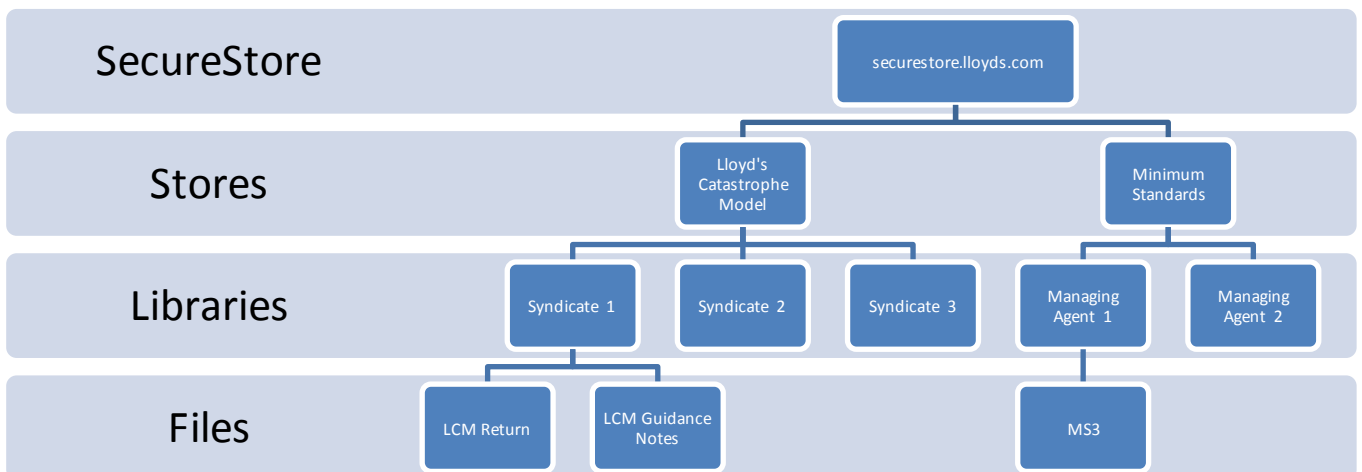
SecureStores can be based on different types of Market entities: Syndicates, Managing Agents, Brokers, Members, Member's Agents, DCP Groups or overseas Cover holders.
Depending on the entity used the SecureStore site will contain a series of libraries restricted to each entity plus a library for templates and guidance or other non-sensitive information.

1.3 SecureStore Owners

Each SecureStore is owned by a person from the Corporation who is responsible for:

- Liaising with the market or 3rd parties regarding the use of the SecureStore
- Requesting and authorising internal Corporation staff to be given access (see Getting Access 2.2)
- Liaising with IT for any changes to the SecureStore

Internal users can view owners from here: http://sharepoint/departments/ITG/AppDev/SP/SS/Lists/SecureStores/AllItems.aspx

1.4 Devolved Administrators

Each Syndicate & Managing Agent has a nominated Devolved Administrator for SecureStore.

Access to your Secure Store Library is provided by your Devolved Administrator though the Lloyd's Authentication Framework (LAF) system. The Devolved Administrator is responsible for adding and removing users from groups so that staff from his or her organisation can access relevant content.

If you need to know who is a devolved administrator for a particular syndicate or managing agent please contact securestore@lloyds.com , also use this email address for requesting additional devolved administrators .

We have published a Guide for SecureStore Devolved Administrators which can be found at www.lloyds.com/securestore

1.5 File Type Constraints

Certain file types may not be uploaded to Secure Store as these can be potentially harmful. These file types are too numerous to list, but a sample (in no particular order) is provided below. The SecureStore system will automatically prevent uploads of any potentially harmful files.

.exe .com .bat .app .asp .chm .class .cmd .csh .hlp

1.6 File Size & Bandwidth Considerations

As with any web based computer system; large files will take some time to upload based on your internet connection.

The absolute maximum file limit is 2GB.

2 USING SECURESTORE

2.1 Sign up for an account

To access Secure Store you must first Sign up for a LAF account on Lloyds.com.

Use this link https://secure.lloyds.com/registration to register.

2.2 Getting Access for Lloyd's Corporation staff

The SecureStore owner should send a request through the Lloyd's helpdesk or My IT with the name(s) he or she wants to have access and the name of the SecureStore. The Helpdesk will then log this request to the SharePoint team.

2.3 Getting Access for Syndicates or Managing Agents staff

For users at Syndicates or Managing Agents, your Devolved Administrator will need to add your account into the correct group from the LAF website.
Your Devolved Administrator should read the guide at www.lloyds.com/securestore to get more information of the process.
You can use this email address to find out who your Devolved Admin is: securestore@lloyds.com

2.4 Getting Access for other external users

For users at other external organisations you should speak to your Lloyd's Corporation contact who will arrange your access.

2.5 Accessing Secure Store

In order to access Secure Store, simply navigate to

http://securestore.lloyds.com

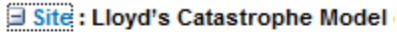Alternatively follow the link at www.lloyds.com/securestore

Then login with your email address & Password.

2.6 Navigating SecureStore

On the Secure Store home page navigate to your desired area by clicking the plus sign.

Then simply click your organisation name to access the library.

Use the breadcrumb to navigate within SecureStore. Clicking on the name of the Entity will take you back to the entity library or clicking on "SecureStore" will take you back to the homepage. If you have subfolders they will also appear as links in the breadcrumb so you can navigate backwards and forwards within your library.
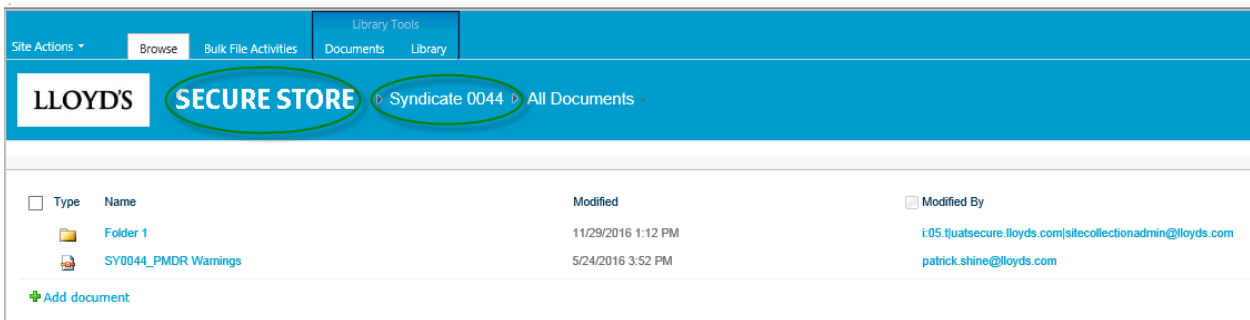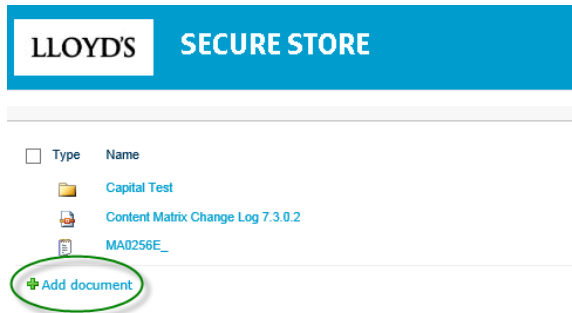

2.7 Log-Out

Ensure you use the Log-Out button when you are finished using SecureStore.

2.8 Uploading Files

1. Click 'Add Document'.

2. Select the file from your local computer or network and click ok.
3. Depending on the setup of your store, you may be presented with a screen asking you for information relating to this file (metadata), such as "Document Type" or "Status". Simply follow the prompts.

   All fields marked with a red asterisk ✱ are mandatory

4. Finally you should see your file uploaded in the library.

To upload multiple files into one Library use the Upload Multiple Documents link from the ribbon.
(Please note this button will only appear if you have Microsoft Office installed and configured on your PC whilst using IE)
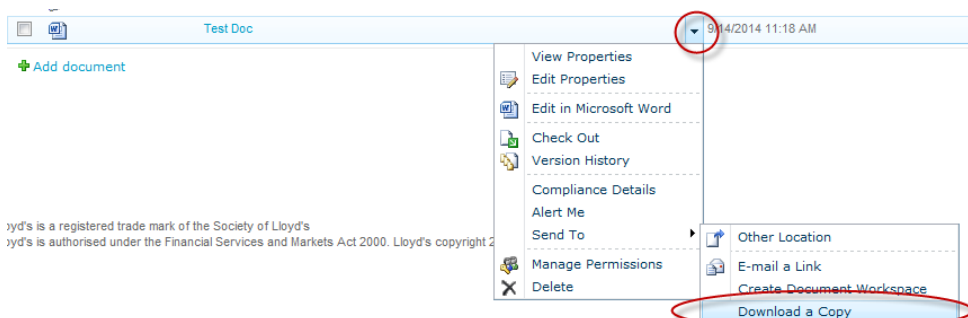
1 Click Documents > Upload Multiple Documents
2 Select the files from your local computer or network.
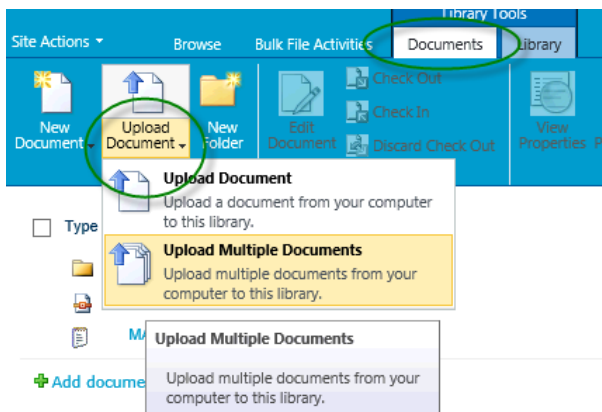
2.9 Downloading Files

To download a file from Lloyd's Secure Store, follow the instructions below.

1. Hover over the file to be downloaded.
2. Click on the drop down arrow that now appears to the right of the file name.

3. Choose 'Send To' then click on 'Download a Copy'.
4. You will now be prompted to save the file to a location on your computer.
5. Please note large files will take longer to download.

2.10 Performing Bulk Uploads & Downloads (internal users only)

If you need to bulk upload or download multiple files to or from all Entity libraries in one operation (for example if you have one file for each Syndicate and need to download them quickly) then you can use the Bulk Tools.

You will need to navigate into a library to launch the bulk tools screen but from there you will be uploading into all libraries for that SecureStore.
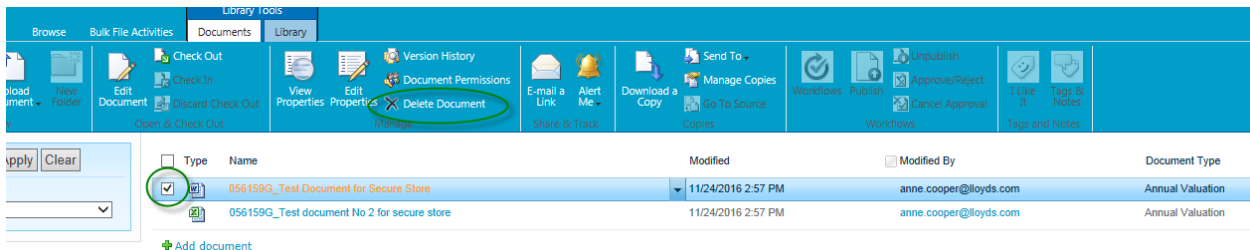
We have a separate user guide for the bulk tools available here

2.11 Deleting Files

Files within SecureStore should be cleaned down when they are no longer required.

To delete a file or folder follow this procedure:

1. Check the box next to the File(s) or folders you want to delete
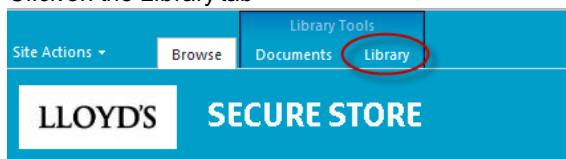

2. Click delete in the ribbon.
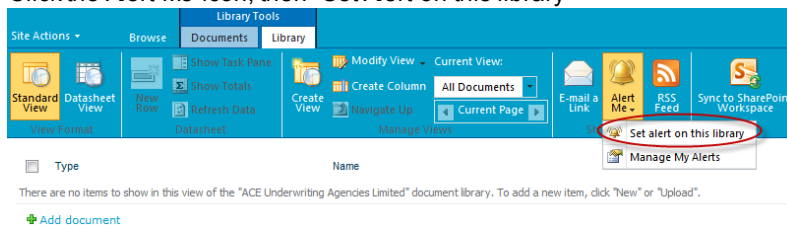
2.12 Email Alerts

SecureStore provides you with the ability to create Email notifications when new files are uploaded or changed.

To be alerted when any type of file is uploaded or changed for a specific library:
1. Click on the Library tab

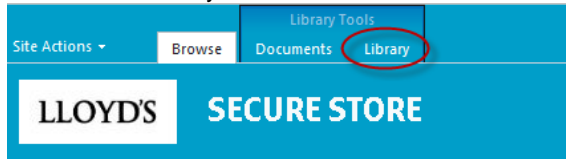2. Click the Alert Me icon, then "Set Alert on this library"

3. Follow the on-screen instructions to setup your alert. Once setup you should receive a confirmation in a few minutes.
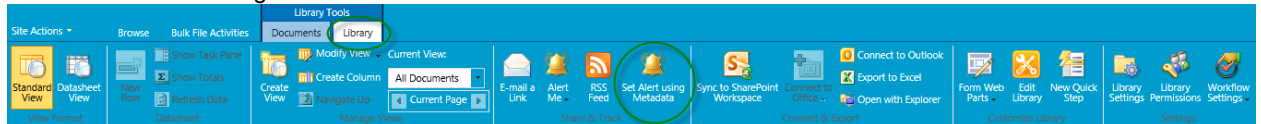
To be alerted only when a file has been tagged with specific metadata for a specific library:

To setup:

1. Click on the Library tab

2. Click on "Set Alert using Metadata"

4. If the Store has any choice fields available you will see them on the following screen beside "Select column to filter". Click the down arrow to select the field and then choose the value from the "Metadata Filter Value".
This will allow you receive an email notification only when a file that has been tagged with that value gets uploaded or changed. Once setup you should receive a confirmation in a few minutes.

To be alerted for all libraries within one SecureStore:

For example, I need an alert when any file has been uploaded into any Syndicate library within my SecureStore:

Please log a request to the IT Helpdesk for the SharePoint team who will be able to create a global alert for all libraries within one SecureStore. Please ensure you include:

1. The names of the users who should receive the alert
2. The type of alert you would like creating, for example only for specific metadata.