NETSHARER PRO USER GUIDE

NetSharer.com
221-227 High Street
Orpington
Kent BR6 0NZ
United Kingdom

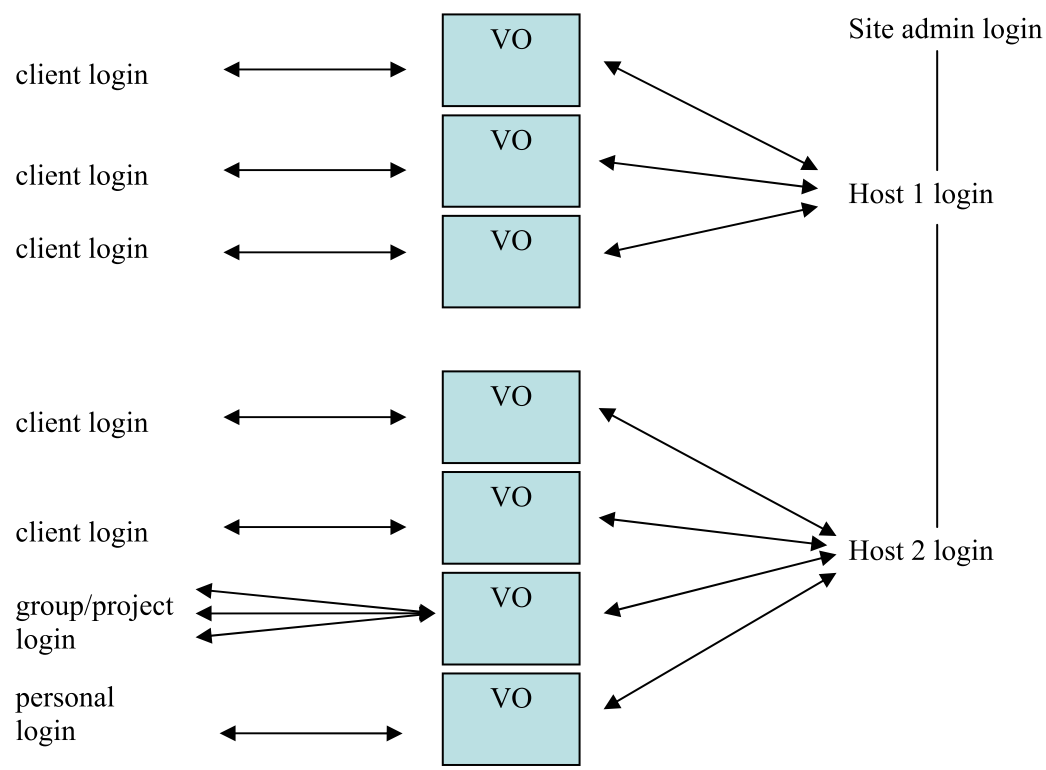
T: +44 (0) 1689 883313
F: +44 (0) 1689 831478
E: support@netsharer.com
W: www.netsharer.com

CONTENTS

A FOR SITE ADMINISTRATOR - Setting up your Virtual Office system

A1 The Virtual Office system structure

NetSharer PRO is a hosted service that enables individuals, groups and businesses to work together online in a secure environment. You can invite clients to log in to one of your Virtual Office internet workspaces to use the system. Each Virtual Office has two access points, or logins, one for the client, group or individual, the other for the host.



Each client has a unique login to his/her own Virtual Office, but one host login can be used to access many client Virtual Offices.

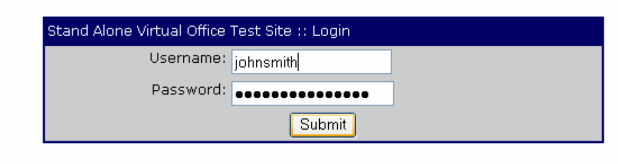
All logins are multi-user and Virtual Offices can be accessed simultaneously by several individuals using the client login and several individuals using the host login.

The Site Administrator is responsible for setting up the system structure, including client logins and host logins.

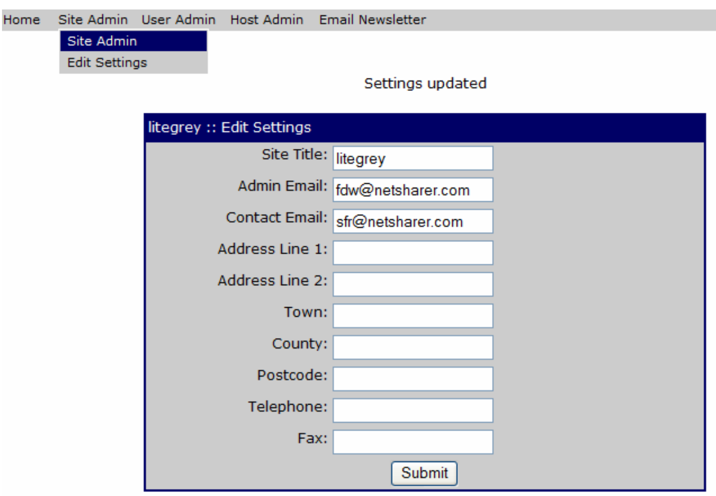
The Site Administrator has full control over all areas of the Virtual Office system. The Host Administrator has limited control.

A2 How to access the system

1. Go to your site admin URL which will read something like this:
   www.pluginoffice.com/johnsmith/admin
   The web page will contain your login box.



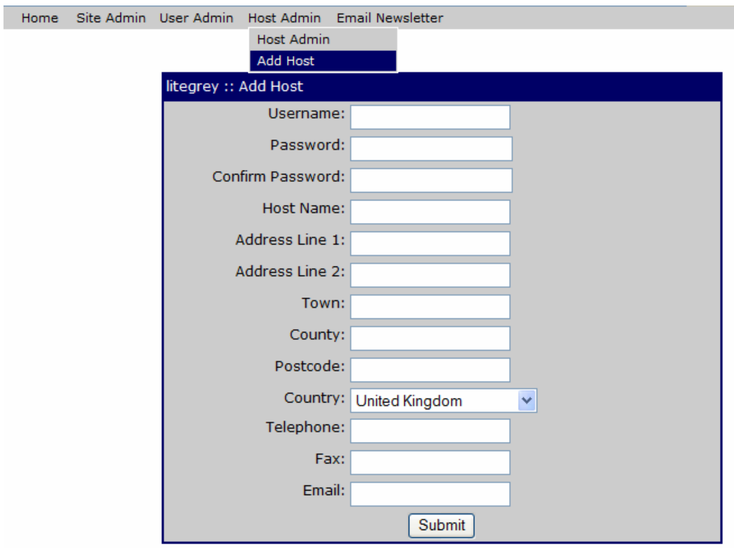
2. Log in using your site admin user name and password.
   You will then see a web page like the one below, containing various menu options.



A3 How to set up a Host Administrator login

From the Host Admin menu option select ‘Add Host’ and you will then see a form for entering details of the Host. (See illustration below)

You must give the Host a User name and Password, which he/she can then use to log in to the system themselves, not as a Site Administrator, but as a Host Administrator.



The email address you enter here is very important. It will be used for all the automatic system email notifications whenever new documents are uploaded by assigned clients.

After entering the relevant details click on the Submit button. You will then be advised that the new Host has been added.

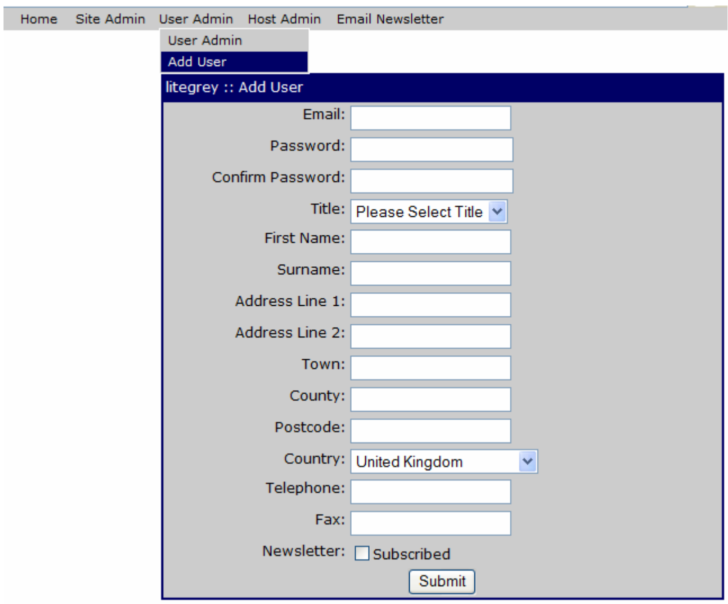
If you select the ‘Host Admin’ option from the Host Admin menu you will see a list of all the Hosts who have been set up on the system.

A4 How to add a User/Client login

From the User Admin menu option select 'Add User' and you will then see a form for entering details of the User/Client. (See illustration below)

You must give the User/Client a User name (the user's email address is used) and Password, which he/she can then use to log in to the system.

Please note that the email address used is very important. It will be used for the automatic system email notifications whenever new documents are uploaded by the host.



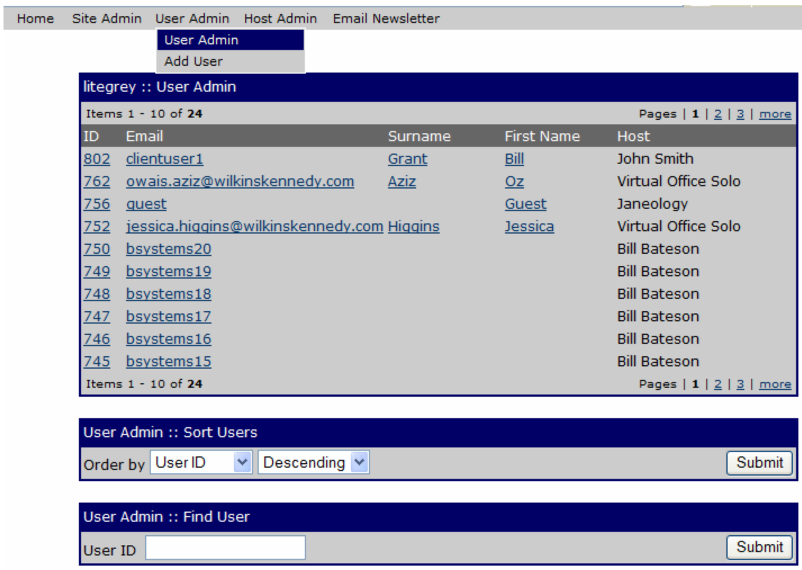
After entering the relevant details click on the Submit button. You will then be advised that the new User has been added.

If you select the 'User Admin' option from the User Admin menu you will see a list of all the Users who have been set up on the system, and the Hosts, if any, that they have been assigned to.

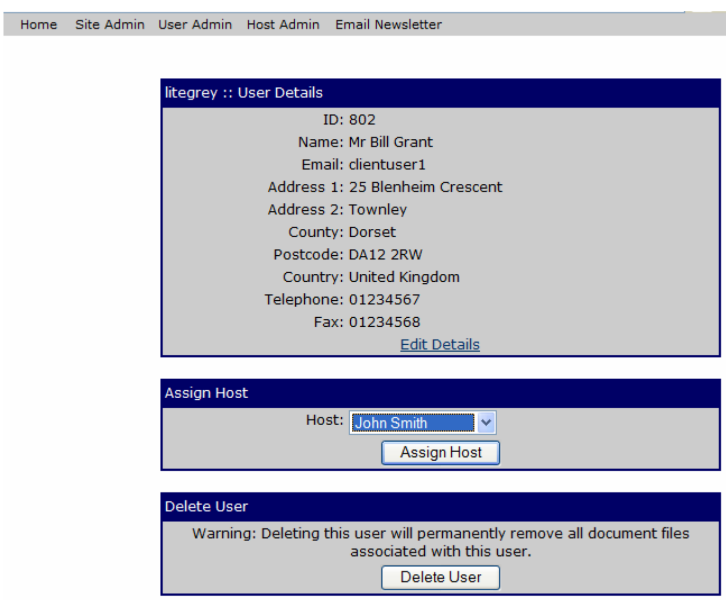
A User needs to be assigned to a Host before a Virtual Office can be set up.

A5 How to assign a User/Client to a Host

From the list of all Users (as below) select and click on the User you wish to work with.

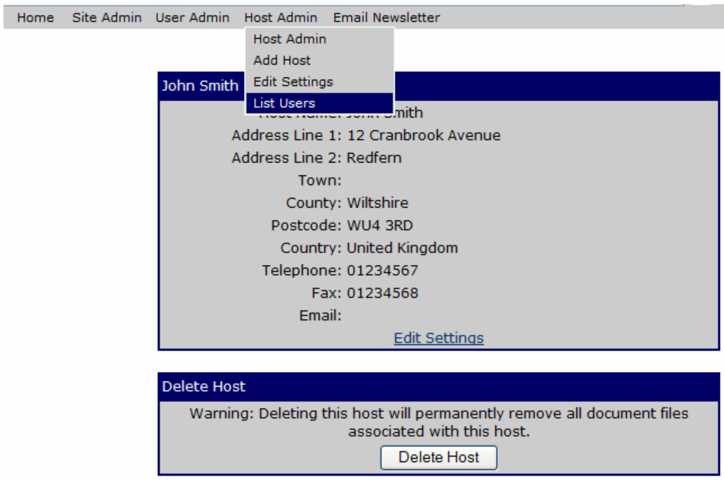


The next screen (see below) will allow you to select and assign a Host for that User.



A6 How to set up a Virtual Office for the User/Client

From the Host Admin menu option select 'Host Admin' and then select and click on the Host assigned to the User. You will see the screen below.



You will see that two new options have appeared on the Host Admin Menu. Select 'List Users' and you will see a list of all the Users assigned to that Host. Next select and click on the User that you wish to work with, and you will see the Virtual Office control page for that User.

From here you can publish any folders you wish to the User's Virtual Office by ticking the relevant boxes and clicking the 'Update' button (the screen will refresh). The process of publishing any folder will set up the Virtual Office so that the User can access it.

If all folders are subsequently removed (by unticking all boxes) the User will be unable to access the Virtual Office.

A7 How User Registration works

The User Registration feature enables website visitors or users/clients to add themselves to the system, ie. enter their own details including user name and password. Once they have registered they will be added to the client database but they will not have access to a Virtual Office until you have assigned them a host and published at least one folder to activate their Virtual Office.

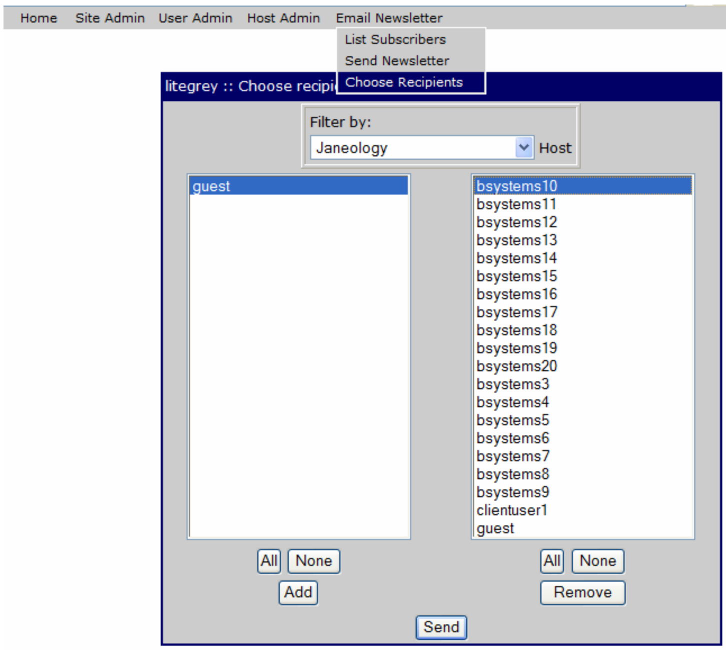
The User Registration feature can be used for clients to register themselves instead of the Site Administrator doing this.

The User Registration feature can also be used to encourage website visitors to register, particularly if you offer some incentive, for example a free newsletter. Once a website visitor has registered he/she will be added to your client database and his/her details will appear in the user list.

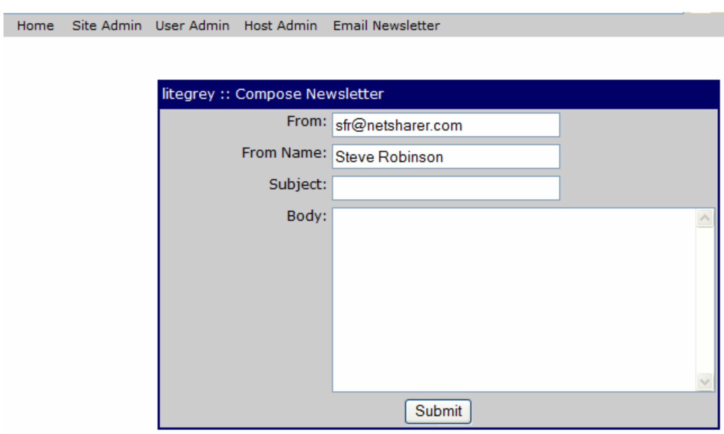
A8 How to access and email the Client database

You can automatically bulk email any or all users who have subscribed to the newsletter. This facility can be used for rapidly (and at virtually no cost) sending correspondence, newsletters, reminders, and other information to clients.

From the Email Newsletter menu select ‘Choose Recipients’.



Here you can select the recipients for your email mailshot. Next click on the Send button and you will see the following screen.

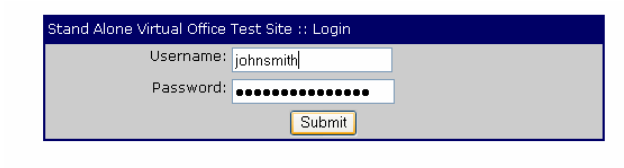


Here you can enter the text and other details for your email mailshot, and add an attachment if you wish. If you type URLs into your text, these will automatically be converted into hyperlinks for the recipient.

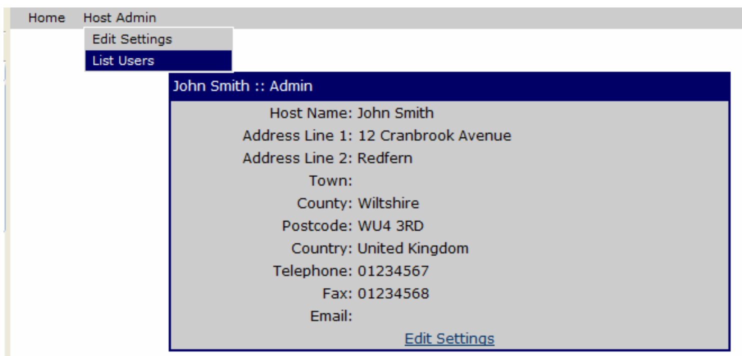
B FOR HOST ADMINISTRATOR - Using your Virtual Office system

B1 How to access your Client's Virtual Office

1. Go to your admin URL which will read something like this:
www.pluginoffice.com/johnsmith/admin
The web page will contain your login box.



2. Log in using your host admin user name and password.
You will then see a web page like the one below, containing some menu options.



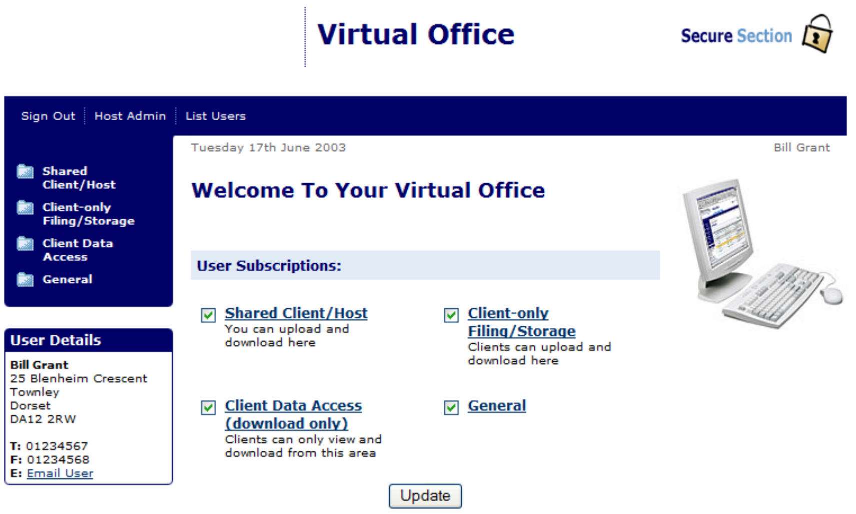
3. Select 'List Users' from the Host Admin menu, and you will then see a list of all the Clients/Users assigned to your login.

4. Select and click on the Client/User you wish to work with, and you will then see the control page for that Client's Virtual Office.

From the control page you can access any area of the Client's Virtual Office.

B2 How to publish folders to your Client's Virtual Office

The illustration below shows the control page for a Client's Virtual Office.



From here you can publish (or unpublish) any folders you wish to the Client's Virtual Office by ticking (or unticking) the relevant boxes and clicking the 'Update' button (the screen will refresh).

If all folders are removed (by unticking all boxes) the Client/User will be unable to access his/her Virtual Office.

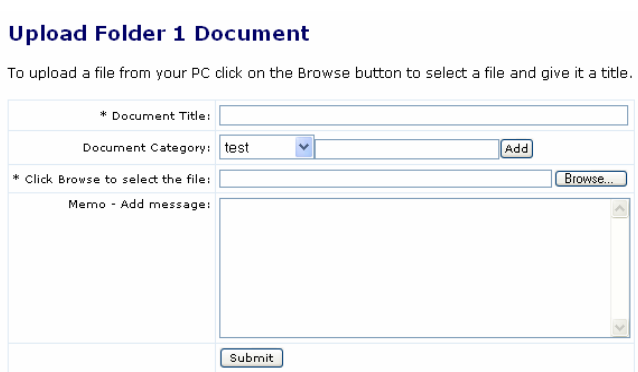
The process of publishing any folder will set up the Virtual Office again so that the User can access it.

B3 How to view and upload and download files and documents (to and from your Client's Virtual Office)

Upload

1. Enter your Client's Virtual Office and then the folder you wish to upload into.

2. Click on the 'Upload New Document' area.
The screen illustrated below will appear.



3. Click on the browse button and select a file or document on your PC or network.

4. Give the file or document a Title and, if you wish, a Category to assist in filing and retrieving at some stage in the future. You can set up new categories if you wish, by using the Add option.

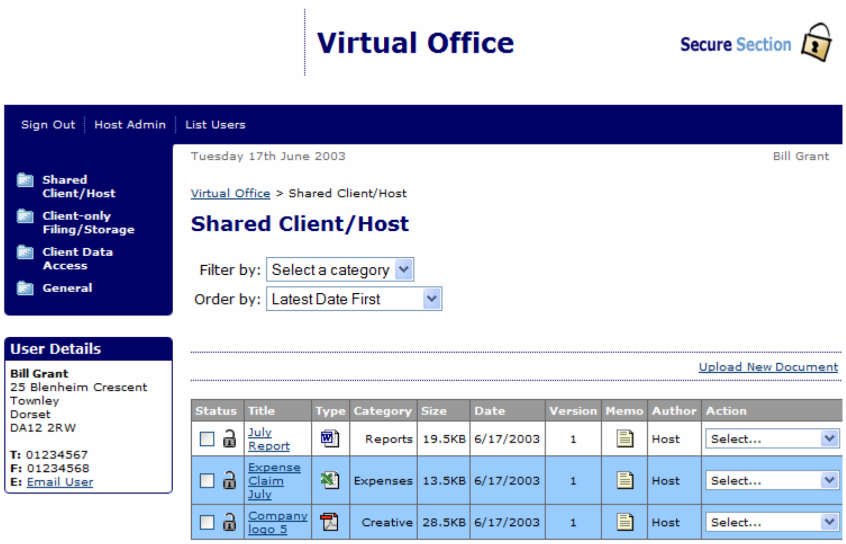
5. You can also attach a text message to the document. This message will appear in the document information bar and will also be sent as part of the automatic email notification to the User/Client when the document is uploaded.

6. Click on the 'Submit' button to upload the document to your client's Virtual Office. The document will appear in the Virtual Office. The Virtual Office system will automatically email the User/Client that the document has been uploaded.

View and/or Download

To view a file select and click the document you wish to view. To download it click on Select > Edit/Download. More information is given below under 'Managing files and documents and sending messages'.

B4 Managing files and documents and sending messages



Each file or document is shown within a bar which contains associated text messages and other useful information. The locking function preserves the integrity of the document and ensures that client and host cannot simultaneously make changes to the document. If either client or host selects the edit/download option, the document automatically locks to the other user. This means that it becomes read-only, and although the other user can view the document he/she cannot make any changes to it.

Documents can also be manually locked and unlocked (to the other user) by checking the status box next to the lock icon. Some functions like **Delete** only become available when the document is locked to the other user.

Bars with a grey background indicate that they have been locked by the host (perhaps have been downloaded to the host's PC) and are therefore locked and read-only to the client.

Bars with an orange background indicate that they have been locked by the client (perhaps have been downloaded to the client's PC) and are therefore locked and read-only to the host.

Colour coding:
Bars with a blue background contain new and unopened documents. Once opened the background colour changes to white. This enables you to see at a glance which documents are new.

B4 Managing files and documents and sending messages (Continued)

Version Control

When you upload the same document more than once but with changes the Virtual Office will keep track of the version number. To upload a new version of an existing Virtual Office document click on Select> Upload New Version. You can revert to any earlier version number by clicking on Select>Undo Upload, as long as the other user hasn't edited the document. To perform the functions above you may need to first lock the file to the other user.

More useful tips:

Downloading
To download a file click on Select> Edit/Download. The Document is now in read only mode. If you make changes to the document from here they will not be saved. If you want to make changes to the document you must select "save this to disk" first (refer to editing instructions below).

Editing
To make changes to a document click on Select> Edit/Download. Then select the "Save this file to disk" option. You can then save the document on your PC. You can then make changes to it. Save your changes in the normal way then upload the document as a new version. Use Select>Upload New Version.

Deleting
You can only delete a Virtual Office file after you have locked it to the other user. To delete a file click on Select> Delete Document. If the version number is greater than 1 you will have to first click on Select> Undo Upload to undo recent uploads.

Messages
You can send a message or query relating to any file at any time by clicking on Select>Send Message. To view a message click on the Memo icon. You can also email the other user if you wish by clicking on Email.

C NetSharer Information for your clients/other users

Introduction to your NetSharer Virtual Office

Your Virtual Office is a private, secure smart online workspace set up exclusively for you. It enables you and your host to work together online in a secure environment. Your Virtual Office uses industry standard 128-bit SSL encryption, as used for online banking.

You can use your Virtual Office to store, file, exchange and share any type of PC file or document with your host. It can be used for letters, spreadsheets, reports, statements and more.

<u>How to access your Virtual Office</u>

Your Virtual Office can be accessed via the login box at the URL given to you by your host.

Enter the user name (or email address) and password provided to you.

You will then see the Home Page of your Virtual Office.

From here you can access all your folders and view all your documents.

Within your Virtual Office it is easy to upload and download files and documents from your PC or network. You can file an unlimited number of documents in your Virtual Office.

Being web-based, your Virtual Office is accessible from home or office, on the move, from anywhere and at any time.

The four types of folder in your Virtual Office

Within your Virtual Office there may be four types of folder.

1 Shared Client/Host folder

You can upload as well as download with this type of folder. It is only for you and your host, and used for sharing files and documents with us. From here you can open reports and other documents and view and discuss them online simultaneously with your host, regardless of where you or your host are located, and at any time of day or night.

2 Client-only Filing/Storage folder

You can upload as well as download with this type of folder. This type is private and for your own use only. You can use it for filing and storing your own important files and documents, and perhaps backups of your data. As it is web-based you can access your files and documents from anywhere, at any time, from home as well as work as well as on the move.

3 Client Data Access

You can only view or download from this type of folder. It is private and used for giving you access to your reports, company profile, returns and other files, documents and information that your host holds on file. As with the other folders you can access the information from anywhere and at any time.

4 Public

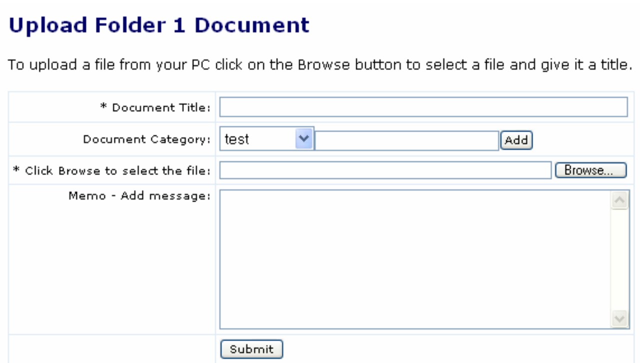
You can only view or download from this type of folder. It is shared with other clients and acts as a public notice-board for a group of clients. As with the other folders you can access the information from anywhere and at any time.

How to view and upload and download files and documents

Upload

1. Enter the folder you wish to upload into.

2. Click on the ‘Upload New Document’ area.
The screen illustrated below will appear.



3. Click on the browse button and select a file or document on your PC or network.

4. Give the file or document a Title and, if you wish, a Category to assist in filing and retrieving at some stage in the future. You can set up new categories if you wish, by using the Add option.

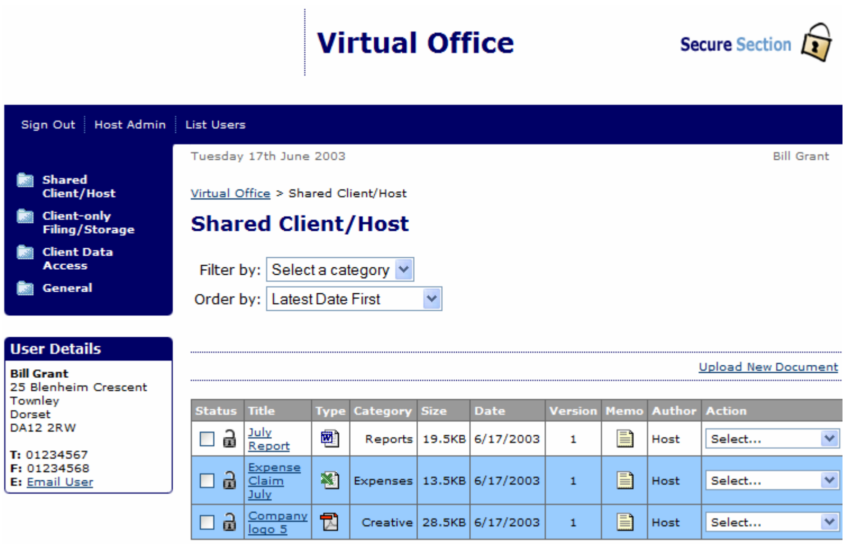
5. You can also attach a text message to the document. This message will appear in the document information bar and will also be sent as part of the automatic email notification to the Host when the document is uploaded. If the document is for the attention of a specific person you should note this in the text message.

6. Click on the ‘Submit’ button to upload the document into the Virtual Office folder. The document will appear in the folder. The Virtual Office system will automatically email the Host that the document has been uploaded.

View and/or Download

To view a file select and click the document you wish to view. To download it click on Select > Edit/Download. More information is given below under ‘Managing files and documents and sending messages’.

Managing files and documents and sending messages



Each file or document is shown within a bar which contains associated text messages and other useful information. The locking function preserves the integrity of the document and ensures that client and host cannot simultaneously make changes to the document. If either client or host selects the edit/download option, the document automatically locks to the other user. This means that it becomes read-only, and although the other user can view the document he/she cannot make any changes to it.

Documents can also be manually locked and unlocked (to the other user) by checking the status box next to the lock icon. Some functions like **Delete** only become available when the document is locked to the other user.

Bars with a grey background indicate that they have been locked by the host (perhaps have been downloaded to the host's PC) and are therefore locked and read-only to the client.

Bars with an orange background indicate that they have been locked by the client (perhaps have been downloaded to the client's PC) and are therefore locked and read-only to the host.

Bars with a blue background contain new and unopened documents. Once opened the background colour changes to white. This enables you to see at a glance which documents are new.

Managing files and documents and sending messages (Continued)

Version Control

When you upload the same document more than once but with changes the Virtual Office will keep track of the version number. To upload a new version of an existing Virtual Office document click on Select> Upload New Version. You can revert to any earlier version number by clicking on Select>Undo Upload, as long as the other user hasn't edited the document. To perform the functions above you may need to first lock the file to the other user.

More useful tips:

Downloading

To download a file click on Select> Edit/Download. The Document is now in read only mode. If you make changes to the document from here they will not be saved. If you want to make changes to the document you must select "save this to disk" first (refer to editing instructions below).

Editing

To make changes to a document click on Select> Edit/Download. Then select the "Save this file to disk" option. You can then save the document on your PC. You can then make changes to it. Save your changes in the normal way then upload the document as a new version. Use Select>Upload New Version.

Deleting

You can only delete a Virtual Office file after you have locked it to the other user. To delete a file click on Select> Delete Document. If the version number is greater than 1 you will have to first click on Select> Undo Upload to undo recent uploads.

Messages

You can send a message or query relating to any file at any time by clicking on Select>Send Message. To view a message click on the Memo icon. You can also email the other user if you wish by clicking on Email.