

What is it?

The secure document exchange is a tool that allows you to store documents for us to work with in a secure place. It also allows us to store documents on a secure server for you to download and review as you wish.

How do I become a user of this service?

To use our Secure Document Exchange (SDE) facility, you must firstly be enabled for this service - your accountant will do this for you.

How do I login?

If you are enabled for the Secure Document Exchange (SDE), there will be an extra link on the site which allows you to login to your own Secure Document Exchange (SDE) area. If you can't see this link, contact your accountant and they will confirm if you are enabled for the service and point you to the link.

When you click the SDE link, you will be taken to your SDE area. If you are not logged in, you will be asked to do this before being allowed to access your documents. Once you have successfully submitted your login details you will be redirected to your documents page.

If you do not know your username and password you can access this from the login page by clicking the Forgotten Login link on the Login page.

Your documents page looks like this:-

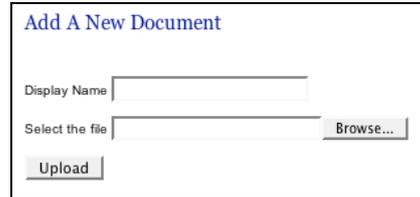
My Documents					
Add a new document					
Description	File Name	Last Updated	Lock / Update	Delete	Document Size
Test Document Demo	electrics.doc	16/09/05	Lock	Delete	20k
test cert	add Certificate.txt	12/09/05	Lock	Delete	1k
test2	test3	11/09/05	Locked by Jonathan Mann		0k
test	test	11/09/05	Locked by Jonathan Mann		0k
word	URLs.doc	02/09/05	Unlock Update		26k
docs	addCertificate.txt	18/08/05	Lock	Delete	1k

From your documents screen you can do the following.

- 1) Add a new document
- 2) Download a document
- 3) Update a document
- 4) Delete a document

1) How do I add a new document?

From the 'My Documents' page click the "Add a new document" button and complete the following screen.



- i. **Display Name** - It is a good idea if the "Display Name" is a description of the document, for example "Tax Return – FL Media 2006". The characters that you can use in the "Display Name" are:
 - 0-9
 - A-Z
 - a-z
 - Space
 - @, = [] () & _ - ' .
- ii. **Select the file** – Click the browse button to find the file you wish to upload from you computer or network so your accountant can view it. Please note that the characters that you can use in the filename are the same as for the display name noted above.
- iii. **Upload** – Click the upload button to upload the file. The file will only upload as quickly as your internet connection. Please note most internet connections have a much slower upload speed than download speed so please be patient and wait for your browser to return you to the "My Documents" screen.

When you are returned to the "My Documents" screen the document will be available for your accountant to view, you can then contact them to let them know it is available for them.

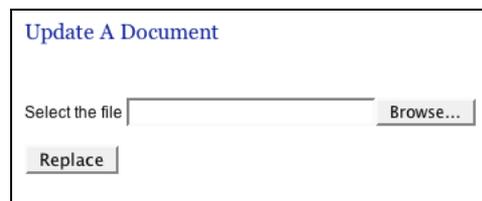
2) How do I download a document?

To download a document from the my documents screen simply click on the file name, you can then save the document to a location of your choice, or it will automatically open in your chosen helper application if your browser has been set to do so.

3) How do I update a document?

To update a document you must firstly lock it by clicking the 'Lock' link on the My Documents Screen, when you do this the link changes to 'Unlock | Update'. Locking a document ensures you don't end up in a situation where you and your accountant are both trying to update the same document at the same time.

When you lock the document, you can then update it by clicking the 'Update' link which then takes you to the following screen.



Browse to the file in your local file system or network you wish to use for the update. Please note the file will need to be the same name as the document on the SDE, this is because we are planning to introduce versioning in a future version of SDE. Once you have selected the file click the Replace button, the file

you have chosen is used to update the document in the SDE, please note once you have replaced the file the previous version cannot be retrieved.

4) How do I delete a document?

To delete a document simply click the 'Delete' link and confirm you are SURE you want to do this in the alert which pops up.