Help Guide

capsa

Help Guide

Welcome to Capsa; let's get you up and running.

Capsa has been designed to be simple to use. In the first instance, we suggest giving it a go. In most cases, you can learn how to navigate the portal in a few minutes. If you need further help, this user guide is for you.

This guide walks you through the basics of the initial setup, from how to manage your subscription to how to use the Capsa features. You will also find further guides in the Resources section of our website: www.capsaapp.com/resources/.

Contents

1. Getting Started

1.1 Capsa Portal and Capsa App

Before you start you should be aware of the Capsa platforms and how to access them.

There are two platforms:

1. **Capsa Portal**
   This is the main Capsa platform where you will be have access to the full Capsa features to manage your project.

   The portal is accessed via your chosen web browser and is hosted in the cloud. Whilst Capsa should function on any browser, please note it has been designed and tested using Safari and Chrome.

   This guide covers how to use Capsa via the main portal.

2. **Capsa App**
   The App is a view only platform, available for download to your handheld device. This can be accessed via the Apple or Android stores.

1.2 Sign Up

You will be the first to create an account as a project creator.

To create a Capsa user account, click on the Sign Up option on our website. This will take you to the Create Your Capsa Account page.

Follow the onscreen prompts to enter your personal and organisational details, contact information, and a strong password, then click Create Account.

Please note that Capsa creates an account using a user's unique email address. Email addresses cannot be shared between users or organisations.

1.3 Create A Project

As a new user, you will be prompted to Create A New Project.

Follow the onscreen prompts to enter your project details. Click Create Project to take you to the Payment page.

Enter your payment information as prompted. This will be the billing information used to take payment for your ongoing subscription. You can change these details and the project owner anytime within your Settings.

Once you have entered your payment details, click Make Payment. Congratulations, you now have a Capsa subscription and are one step closer to a happier and more productive team.

1.4 Starting Your First Project

To start your project, you need to add documents and users. It's up to you how you go about starting your project. In our experience, depending on the stage of the project, there are two approaches to getting started:

1. **Add Content First**
   Some users prefer to create a starting point first. Typically, the project Owner or Admin uploads the tender or contract status information on behalf of the team.

   This creates a clear starting point for managing the project moving forward, with the project Admin able to ensure the basics of good document control are in place. Once the initial documents have been uploaded, you can start adding users.

   Please note that when uploading documents on behalf of another organisation, you need to manually adjust the Author data field.

   Part 3 explains how to add content to your project.

2. **Add Key Contributors First**
   The alternative approach is to invite users to the project first. By inviting Edit users, you can allow them to upload their own documents to the Project Home.

   Part 2 explains how to add users to your project.

Once you have uploaded documents and added users, you are ready to start enjoying everything Capsa has to offer.

Please note that Capsa Features remain hidden until content and users have been added to a project.

1.5 Starting Another Project

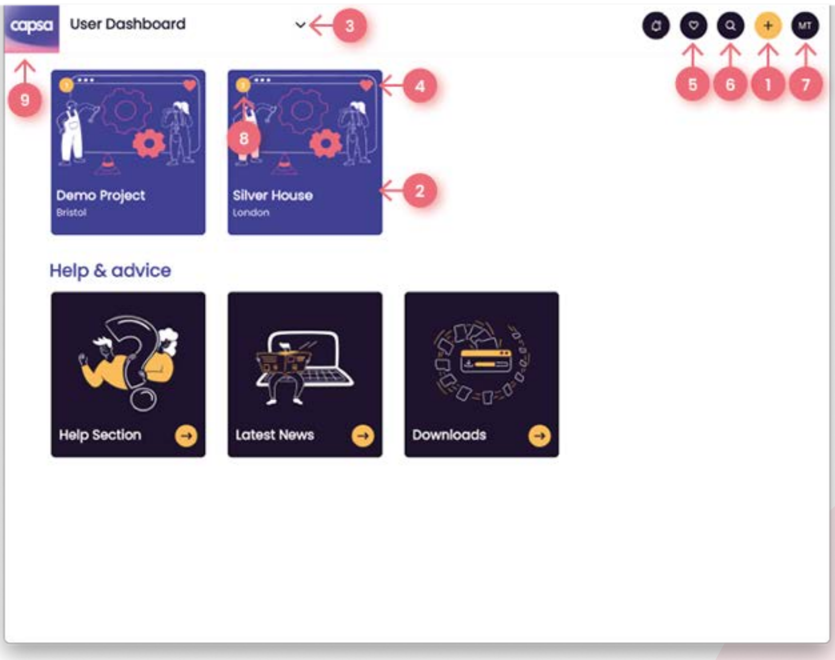
Creating a new project is easy. On the User Dashboard page, click on the Capsa Plus icon in the main header. This will bring up the option to Create A New Project.

Click this option and then follow the onscreen prompts as set out within Item 1.2 to create your project. Start using your project as set out in Item 1.3.

1.6 Navigate Capsa Portal

The Capsa user interface has been designed to be simple to navigate. There are two main interfaces where you will spend most of your time. These are the User Dashboard and Project Home.

To keep the user interface clean, the majority of features are hidden behind the Capsa Plus icon [1]. On any given page you can click on the icon to reveal the features available.



- **User Dashboard**
  This is the main page you will see when you sign in. This shows the projects you have access to and is where you will access a project.

  You can access a project by clicking on the project box [2] or clicking on the User Dashboard dropdown menu at the top of the page [3].

  The project name, location and image can be changed in the project settings.

You can pin your favourite projects to the front by clicking on the heart icon [4]. You can then click on the heart icon in the header [5] to toggle between favourite and all projects.

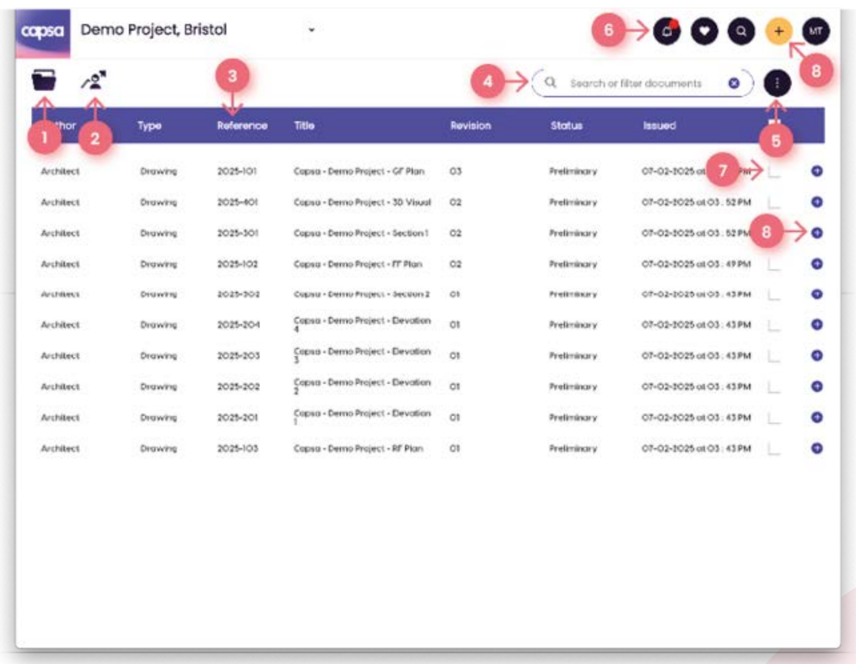
You can also search for a project using the Search icon in the header [6].

You can access help and your personal Settings from the header [7].

When a project has a notification, the notification number will appear in the project box [8].

Clicking the Capsa icon on any page will return you to the User Dashboard [9].

- **Project Home**



This is the page where you can manage your project and documents. There are no sub-folders; all documents will be accessed and controlled via this page.

You can view and edit the Project Details by clicking on the file icon [1]. Please note that only a project Admin can edit the project details.

Each project is given a unique Capsa reference found in the Project Details. This is the reference you will need when requesting support from our team and is how we identify subscriptions.

You can view and edit the Project Users and usage by clicking on the user icon [2]. Please note only a project Admin will be able to manage Users. Within this page you will see your data usage and remaining capacity. Where you need to increase your data allowance, you can do so by clicking the Extend Plan option. This will ask you to renew your billing details based on the new subscription plan.

You can sort the documents by clicking on any of the headings [3]. You can also search or filter documents by using the Search [4] and Filter tools [5].

Project notifications, including unread notifications, can be viewed in the header by clicking the Notifications icon [6].

If you hover over a document, a Preview of the document will be revealed. Clicking on a document will provide a full-screen view of the document.

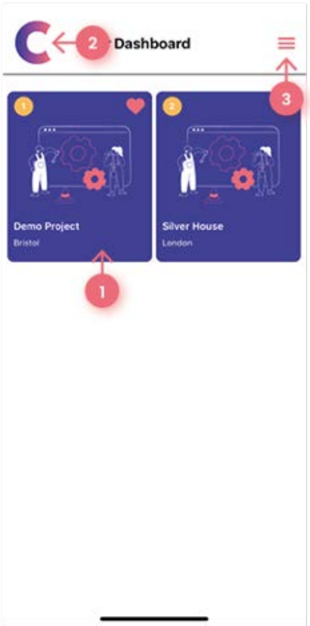
Clicking on the Multiple [7] selection box will bring up further options and tools.

- **Capsa Plus**
  Clicking on the Capsa Plus icon [8] either in the main header or next to each document will provide you with the additional feature options available.

1.7 Capsa App

The principles of navigating the Capsa App are similar the Capsa Portal. The App is predominantly a view only platform with a reduced set of features.

- **User Dashboard**



This is the main page you will see when you sign in. This shows the projects you have access to and is where you will access a project.

Simply click on a project box to access your project [1].

Click the Capsa icon at any time to return to the previous page [2].

Click on the Menu icon to reveal the user options [3] .

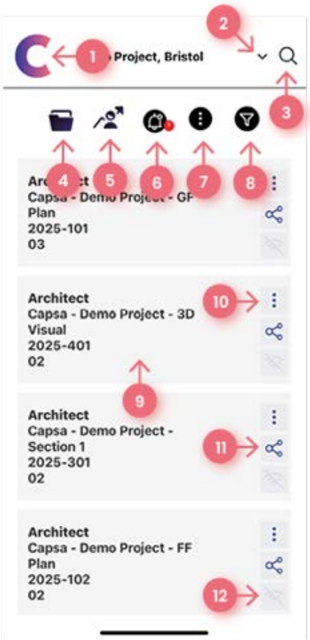
- **Menu Options**
On each page any user options will be accessible via the Menu icon.

Within the Search feature you will be able to search for a project or document.

The Settings option you take you to your personal settings, where you can control Notifications.

From this menu you will also be able to access Capsa Offline. This is where you will see any documents you have downloaded for offline viewing. These documents will be available for 24 hours.

- **Project Home**



This is the page where you can view your project documents and access the following tools and features:

Click the Capsa icon at any time to return to the previous page [1].

You can toggle between projects from the project selection drop down in the header [2].

You can search for any documents using the Search icon [3].

Access information about the project using the Project Details icon [4].

Access information about the project users and usage using the Project User icon [5].

Access project Notifications [6].

Search and Filter documents [7], resetting your view by clicking the reset icon [8].

Open a document by clicking the document box [9]. The App view provides basic information about the document only. To see the full document details you can click the details icon [10].

You can share a document directly from your device using the Share icon [11].

To make a document available to view offline, click the Offline icon [12]. Remember, this document will only be available to view offline for 24 hours.

2. Managing Users

2.1 Users

Before we show you how to manage users, it's work clarifying the different type of Project User and their roles. Capsa has the following user groups set as standard:

Owner	This is the individual who pays the bill. At the start of a project the individual who creates the project is automatically set as the project owner. They retain the ownership of the subscription. The owner has the power to change the owner. You can only have one owner at any time.
Admin	The admin is responsible for managing the project and ensuring good housekeeping. They control the project users access and have additional rights to edit documents.
Edit	Edit-only rights enable a user to add content to the system and undertake more detailed reporting.
View	View-only is exactly what it sounds like. The user only has the right to view documents and cannot make any changes to documents.

Capsa is structured so that every Project User can view all documents within the project. If you do not want an individual to view all documents you should consider using our Guest option. Guest users are not considered Project Users.

Guest	A guest user does not have access to the system. They will only have access to view and download documents they have been sent via a Transfer.

2.2 Adding Project Users

An Admin can add a new user from the Project Home. Clicking the Plus icon will bring up the option to Add User.

The pop up box will give the Admin the option to insert an email address and to set the access group for a new user. Should you wish to add multiple users, click the Plus icon for each additional user you wish to add. Once you are ready, click Add User.

The new user will then be sent an email from Capsa inviting them to create an account.

2.3 Removing Projects Users

Only an Admin can remove a user from a project.

Within the Project Home, click on the User icon to bring up the list of project users. Next to each user you have the option to Remove.

Please note, removing a user will only remove their access to your project. They will still have access to other projects.

If you remove a user by accident, or if you need to give them access again in the future, you will need to do so using the steps in Item 2.2.

2.4 Changing User Permissions

Only an Admin can change user permissions and access.

Within the Project Home, click on the User icon to bring up the project users list. Next to each user, you have the option to adjust their user group under Access.

2.5 User Settings

Each user is responsible for their own personal details. Users can access their details within Settings via your initials in the header.

2.6 Admin Powers

The Admin has the following powers:

- To add, remove and edit user access.
- To add, remove and edit documents.
- Full reporting and activity tracking rights.

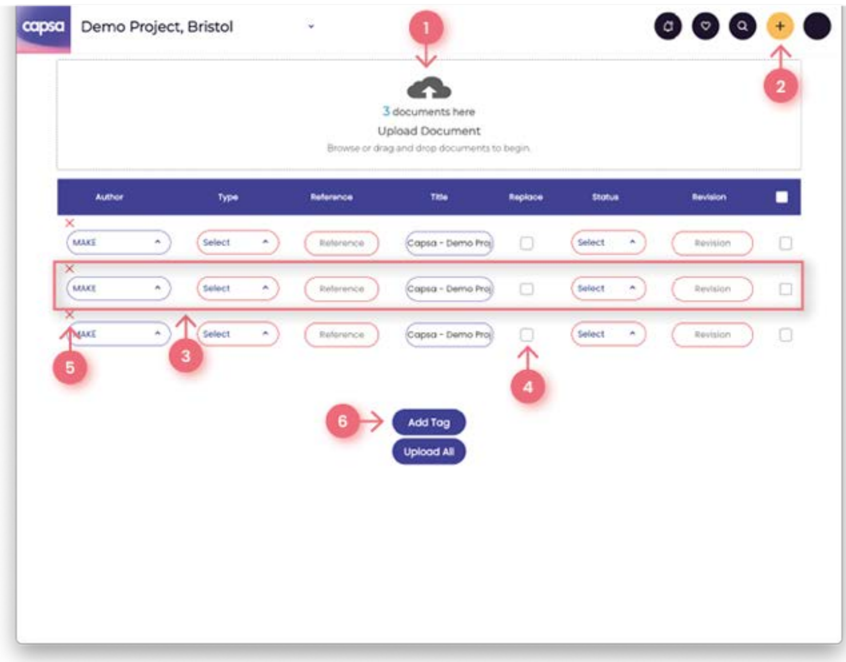
3. Managing Documents

3.1 Documents

Before we show you how to manage documents, it's work clarifying a few points:

- You may upload any file type. However, the Preview function is built on the basis of a .PDF or .JPG file type.
- Every document uploaded to the portal should be of suitable content in accordance with our terms of use.

3.2 Adding Documents



To clarify, only an Admin or Edit only user can add content.

To add a document, click the Plus icon within the Project Home header. Within the drop down menu you will find Add Document. Clicking this will bring up the upload page.

Drag and drop your documents into the Upload Box [1] or click the Plus icon [2] to access your files. For each document uploaded a new data field shall appear below. This contains data fields for the following:

- Author
- Type
- Reference

- Title
- Status
- Revision

Capsa Intelligent Upload will pre-populate the fields where this information is adequately embedded within the document and file name.

You can manually update all of the data fields by either typing or selecting from the drop down option in each field [3].

Where a document is a revision to an existing document, you have the Replace option [4] where you can locate the previous revision to overlay.

If you have incorrectly imported a document, you can delete the document before you upload by clicking the cross [5].

Within the upload home you have the option to Tag the documents [6].

Once you are ready to upload, click Upload All. Capsa will then send an automatic notification to all project users. Should you wish to create a document register, you can create a Report within the Project Home.

If you wish to share documents with a Guest user, you should do so after the upload is complete.

3.3 Adding Revisions

You can add a revision to a document in two ways:

1. Multiple upload route as set out in Item 3.2.

2. Direct document upload.

   By clicking the Plus icon on the document to be updated, this will bring up the Add Revision option. Clicking this option will bring up the upload feature. Follow the same steps as set out in Item 3.2.

3.4 Editing Documents

Only an Admin or Edit only user can edit content.

To edit a document, click the Plus icon adjacent to the document you wish to edit. Click Edit on the menu options. This will bring up the document details where you can edit the document data fields. Once the edits are complete, click Update Document.

Within the document details you can manually change all of the data fields including the authoring organisation name. You cannot change the date or time stamp on the document.

Only an Admin user can delete content.

4. Features

Features are accessed via the Plus icon or once the Multiple selection box has been selected.

4.1 Adding or Editing Documents

The steps to add or edit a document are set out in Part 3.

4.2 Sharing Documents

All project users will be automatically notified of any new documents added to a project.

Remind

Should you wish to share specification documents with a Project User, you can use the Notify or Remind tools. These options will send a notification and email to the user for the highlighted documents only.

You can send a notification for one or multiple documents.

To notify a single document, click the Plus icon adjacent to the document. Then click Notify and select the user from the drop down list. You have the ability to include a message within this notification. Click Reminder to send.

Alternatively, to send a notification for multiple documents, by clicking the MULTIPLE selection box an option will appear to Remind users. Click Remind and follow the steps as previously set out.

Share

In Capsa you also have the option to share documents with non-project users. You can send a transfer to Guest users using either the Transfer or Share options.

To notify a single document, click the Plus icon adjacent to the document. Then click Transfer. You can then enter the email addresses of any induvial you wish to send the documents to. Click Send Transfer to send.

Alternatively, to send a transfer for multiple documents. Click the multiple selection box and the option to Share will appear. Click Share and then enter the details for person you wish to share with. Click Send Transfer to send.

As described further in Item 2.1, a Guest user will only have the rights to view and download the documents sent in the transfer. They will not have access to the Project Home.

4.3 Document Sorting and Searching

Sort
You can sort the documents alphabetically by each heading. To do so click on the heading title you wish to sort by.

Search
You can search documents by entering text into the Search box. This will automatically search and filter the documents as you type. To return to the full documents list, click the X icon.

Filter
You can filter documents by using the Filter tool. Use the drop down options to select your search criteria and click Search when you are ready. To return to the full documents list, click the X icon.

4.4 Tagging

Probably the most underrated feature is the Tag tool.

You can create bespoke tags and apply these to documents. You can then use these tags to search and filter documents by tag.

This tool enables you to remove the need for folders. You can create packages or groups of information by using the tag tool, helping your team to navigate the documents.

You can apply a tag by clicking the Plus icon adjacent to a document, or you can apply tags to multiple documents by clicking the Multiple selection box and then clicking on the Tag pop up option.

In the Tag pop up, you can create new tags or apply existing tags. To add a Tag, choose from the drop down menu or type in a new tag. Once you have selected the tag, click the Plus icon. Once you have finished applying the tags, click Tag to apply them to the document.

4.5 Reporting

There are a number of reports you can create in Capsa:

Access History	Provides a user audit trail for the document.
Revision History	Shows the revision history for the document.
Document Report	A report showing the latest information for the project.
History Report	A full audit trail for the project.

Access History
This report provides you with an audit trail of user access for a document. Each time a user views or downloads a document, this is recorded in the document audit trail. But note, this does not record if a user only views a document in preview mode.

You access this report using the Plus icon adjacent to the document. Click Access History in the pop up menu. You can download a PDF copy of the report by clicking Create Report.

Revision History
This report enables you to see the full revision history for a document. Any superseded revisions will be stacked below the current version. You can download a copy of previous revisions by clicking the download icon.

You access this report using the Plus icon adjacent to the document. Click Revision History in the pop up menu. You can download a PDF copy of the report by clicking Create Report.

Document Report
This is where you can create your traditional document registers.

You access this report using the Plus icon in the header, click Report and Document Report.

This feature works by creating a report using the filters you have applied. If no filters are applied, a report showing the full project documents will be provided. You can create a filtered report by applying the filter first as set out in Item 4.3. Then create a report as set out above.

You can download a PDF copy of the report by clicking Create Report.

History Report
This feature provides you with a full report for the project. Including all user access and document revision history.

You access this report using the Plus icon in the header, click Report and History Report.

You can download a PDF copy of the report by clicking Create Report.

4.6 Viewing

Preview Mode
You can Preview a document by hovering over the document title.

Document View
To fully view a document, simply click on the document line. This will open the document and provide you with the option to full screen, print or download.

The view and functionality within the document view mode will depend upon your browser.

Download
You can download a document within the document view. Alternatively you can download multiple documents by clicking the Multiple box which will bring pop up options.

Printing
You can print a document by accessing the document view. Clicking Print in document view will take you to your internet browser printing settings.

You can bulk print by clicking multiple box options which will bring pop up options.

4.7 App

Details of how to navigate the Capsa App can be found in item 1.7.

The purpose of the Capsa App is to provide a view only platform for hand held devices. The features for App have therefore been stripped back to provide a simple to use viewing platform only. Full functionality is provided via the Capsa Portal.

Within the Capsa App you can:

- Search for projects and documents.
- Filter documents.
- View notifications.
- View documents.
- Share documents.
- View documents offline.

5. Billing

5.1 View Billing Settings

Only a user who is a project Owner will see the full billing options within their personal settings.

You access your Billing settings from the User Dashboard. Click on your initials from the main header menu, and click on Settings. This will bring up your personal settings section. If you are the owner of a project and pay the bill, you will see Payment Details and Billing History.

5.2 Billing History & Invoices

Once in your personal settings section, click on Billing History. In this section, you will find details on your billing history; you will also be able to view and download a copy of your invoice.

5.3 Change Billing Details

Once in your personal settings section, click on Payment Details. We use Stripe to deal with our payments. In this section, you will be able to access your payment details via Stripe to enable you to update your payment details.

5.4 Change a Project Owner

The project Owner can change the ownership of a project to another Project User at any time from the Project User settings within the project.

6. Policy Documents & Terms

A full copy of our terms and policy documents can be found on our website at www.capsaapp.com/resources.

We keep our policies under regular review so they align with the services we offer. Any changes will be published on our website, should anything significant change we will let you know by email.

7. TROUBLESHOOTING & FAQ's

7.1 Pricing

Does it cost anything to have a user account?
No, user accounts are free.

Anyone can create a Capsa user account and gain access to the software. To start using Capsa, you will either need to create a new project yourself (and agree to a new subscription) or be invited to a project.

Does it cost anything to download the Capsa App?
No, our app is free to download.

How do I pay for Capsa?
Pay using any debit or credit card. Payments are processed monthly via Stripe.

Who should sign up for the Capsa Project Plan?
Anyone. Each project is unique, so any member of the team, be that client, consultant or contractor, can sign up to create a project and invite unlimited team members.

Whoever creates the project will automatically be assigned as the project owner, responsible for payment and inviting users. This can be changed at any time in your admin settings.

Is there a minimum term?
No, it's a monthly subscription you can cancel anytime.

What happens if we need more data?
Simply sign up for our data bolt-on. This can accessed by the project admins within the project settings. Our plans are flexible to suit your needs. If you find you don't need the extra data, simply remove any purchased bolt-on plan in your project settings.

What happens when our subscription ends?
If Capsa isn't for you, you can cancel at any time. Access to your project will be restricted once you cancel, and we shall delete all documents in line with our data policy.

7.2 Troubleshooting

I haven't received my invitation to Capsa.
Capsa relies on each user having a unique email. The project admin is responsible for inviting you to join Capsa. If you haven't received the invitation link, this is usually because of the following:

- Your email address was incorrectly typed into the invitation link or
- The invitation email was sent to your junk box.

In the first instance, contact the project admin to check your email address is correct and ask them to resend the invitation link.

Secondly, check your junk box for an email from Capsa Support.

I can't sign in.
We are sorry to hear you're having a problem signing into Capsa.

Assuming you have checked all the usual culprits, of no internet connection, lack of a device, or using the wrong site; simply click Reset Password on the Login page, and we will send a link to your email to get you back up and running.

If all else fails, simply reach out to our support team via Contact Us.

I've forgotten my password.
On the Login page, simply click the Reset Password option, and we will email you a link to reset your password.

7.3 Support

How do I update my personal details?
Login to Capsa, and visit Settings, which are accessible as a dropdown menu from your initials within the portal header.

I don't receive Capsa emails or notifications.
Capsa will communicate with you either through the app or by email. In your personal settings, you can control the frequency of your notifications. In the first instance, please check your settings to ensure you have enabled notifications.

You should also add Capsa to your list of safe senders within your email provider settings. The vast majority of communication from Capsa will be via capsaemails@gmail.com or support@capsaapp.com.

Which web browsers do Capsa support?
Capsa has been designed to work on Safari and Google Chrome. It's likely it will also work on other providers. However, no support or updates are provided by Capsa, so we cannot vouch for its performance.

I still need help.
If all else fails, reach out to our support team via Contact Us.

7.4 Project Admin

How do I correct an upload error?
It happens to the best of us. If you make a mistake when uploading a document, if you have admin or edit rights, simply click on the **Plus** icon next to the relevant document and click on the edit option.

If you need to make further changes or do not have the correct permission rights, simply contact the project admins, who can assist you. If all else fails, a Capsa Admin can assist you.

How do I remove or change a user?
As a project admin, you can add, remove or adjust user permission groups within the project user list. Please note that any changes will affect only that specific project.

7.5 Billing

How do I change the billing details?
Only the project owner can change the billing details. To do so, simply visit Settings, which is accessible as a dropdown menu from your initials within the portal header.

How do I cancel or archive my subscription?
Only the project owner can cancel or change a subscription. To do so, simply visit Settings, which is accessible as a dropdown menu from your initials within the portal header. Within the project settings, you can change the subscription plan to archive or delete the project. Please note that once a project is deleted, all associated data and access will be terminated.

My payment has been declined.
This happens for a whole host of reasons. In the first instance, we will ask you to refresh your billing details so we can retry the payment. Don't worry, we will give you a grace period to sort out the payment issues before we suspend access.

You can find out more about payments from our provider, Stripe.

How do I get a copy of an invoice?
The project owner can view a copy of the invoices in the billing details. To do so, simply visit Settings, which is accessible as a dropdown menu from your initials within the portal header.

8. Contact Us

8.1 Project Help

If your query relates to the documents, users and housekeeping for a specific project, your first port of call should be the project Admin.

You can find the Admin contact details within the Project Home, Project Details icon. If your query relates to a document, you can also make an Plus by clicking on the Admin Request icon adjacent to the document in question.

8.2 Need Further Help

The joy of Capsa is that it's simple to use. Most questions can be answered by simply giving it a go.

If you can't find the answer you need in this user guide or the resources and FAQs found on our website, send our team a message, and they will be happy to help.

The quickest way to get a response is via our website. You can submit a request to our support team on our website at www.capsaapp.com/contact-us.

8.3 Report An Issue

Keeping our system and your information safe is a major priority for us. If you have any security issues or concerns about content, user behaviour or your data, please do not hesitate to contact us via our support team at www.capsaapp.com/contact-us.

8.4 GDPR Requests

We will not respond to any requests from the public or users for information held by Capsa. We understand our GDPR responsibilities and will only review requests for information from your employer (as your data controller) where necessary to comply with our obligations as a data processor.

Further information about GDPR and our privacy policy can be found on the Policy and Key Documents section of our website.

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