

Quick Start

capsa



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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. You will also find further guides in the Resources section of our website: www.capsaapp.com/resources/.

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

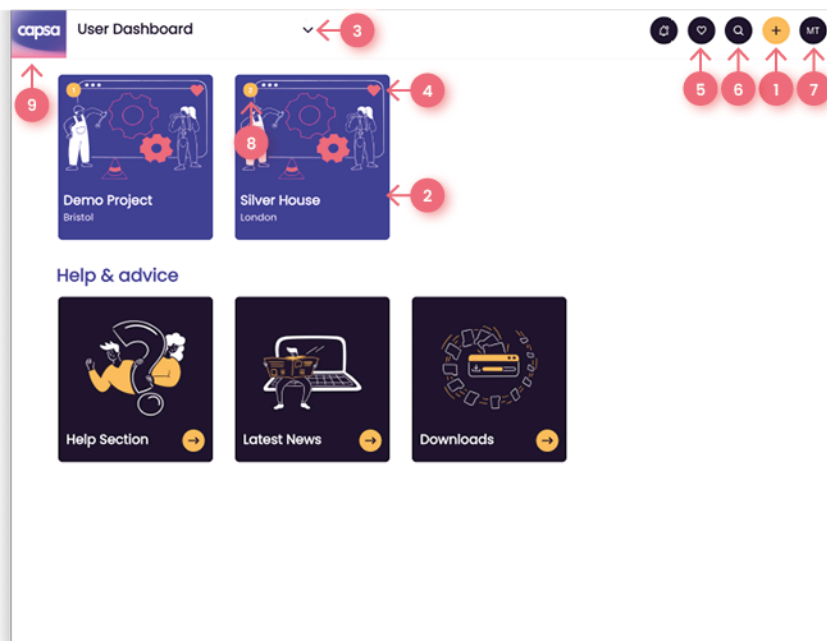
Creating a new project is easy. On the **User Dashboard** page, click on the Capsa **Plus** icon in the main header. This will bring up the option to **Create A New Project**.

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.

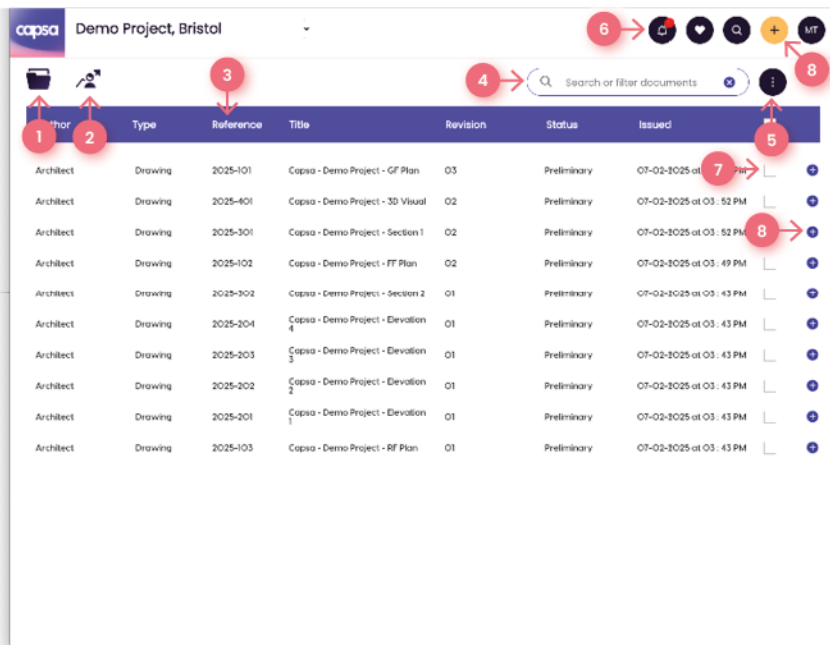
You can also search for a project using the Search icon in the header [6].

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.

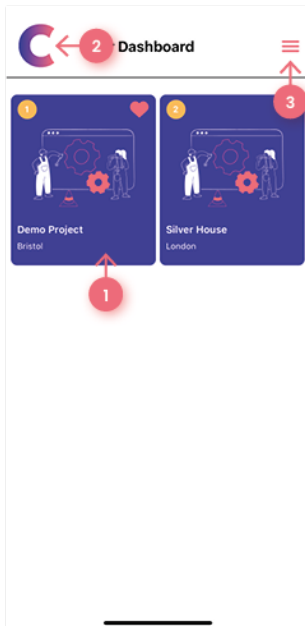
- **Capsa Plus**

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**

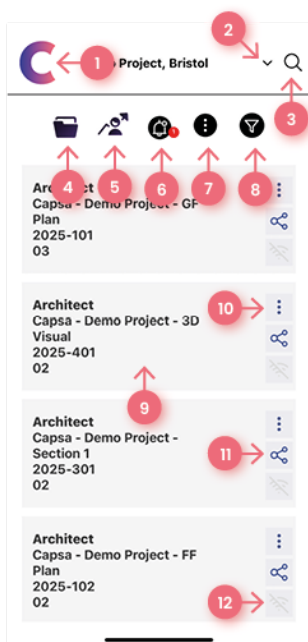
On each page any user options will be accessible via the **Menu** icon.

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.

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