Help Guide

Everything you need to use Capsa properly. Clear steps, practical guidance, no fuss.

Introduction

Welcome to Capsa.

This Help Guide is here for the moments when you're thinking: "Right… how do I do that again?" It is the practical, no fuss reference for using Capsa day to day.

Capsa is designed to be simple. In most cases you can learn it by clicking around for a few minutes and seeing what happens. This guide exists for everything after that. When you want the proper answer, the clear steps, or a quick sense check that you're doing it the right way.

What this guide is for

Use this guide to understand:

- where a feature lives
- what each role can and cannot do
- how to complete common tasks like uploading, revising, sharing, tagging, reporting, and managing users
- what to try when something is not working as expected

If you're a Project Owner, Controller or Lead, this guide also covers the functional bits you'll need to keep things tidy: permissions, user management, reporting, and subscription management.

Introduction

What this guide is not for

This is not a pricing brochure, a plan comparison, or a list of current subscription options.

Where something is likely to change over time such as pricing, plan names, limits, or commercial offers we keep it out of this document on purpose. You will be pointed to the right place on the Capsa website for the latest version, so you are never following instructions that went out of date last Tuesday.

Same principle elsewhere too. This guide focuses on how Capsa works, not the shifting details around it.

How to use this guide

You can read it from start to finish, but it is designed to be dipped into.

Each section is broken into simple tasks, with plain steps and short explanations. If you get stuck, check the Learn and Resources pages on our website, or contact your project team or Capsa Support.

You can also find additional guides and resources on our website in the Resources section.

Right, let's get into it.

capsa

Contents

Platform Overview

Before getting into tasks and features, it helps to understand how Capsa is structured and where you will spend your time.

Capsa has been designed around one simple principle: everything important should be visible, searchable, and controlled from one place.

There are two ways to access Capsa: the Portal and the App.

1.1 Capsa Portal

The Portal is the main Capsa platform.

This is where you will:

- manage projects
- upload and revise documents
- manage users and permissions
- run reports
- control billing and subscription settings

The Portal is accessed through your web browser and is cloud hosted. Capsa has been designed and tested primarily using Google Chrome. It may function in other browsers, but performance and support are optimised for Chrome.

All functionality described in this guide refers to the Portal unless stated otherwise.

log into the portal at
www.app.capsaapp.com

Platform Overview

1.2 Capsa App

The Capsa App is a simplified, view-focused companion to the Portal.

It is available via the Apple App Store and Google Play Store and is designed for handheld use on site or on the move.

The App allows you to:

- search projects and documents
- filter and view documents
- access project information
- share documents
- download documents for temporary offline viewing

The App does not provide full administrative or document control functionality. For uploading, revising, managing permissions, or advanced reporting, use the Portal.

Click on the Capsa C anywhere in the app to take you back to your dashboard.

1.3 Core Navigation Concepts

Capsa keeps the interface deliberately clean. Most features are available when you need them and hidden when you do not.

There are three core areas to understand:

User Dashboard

This is the first page you see when you sign in.

From here you can:

- view all projects you have access to
- open a project
- search for projects
- pin favourites
- access your personal settings

Clicking the Capsa logo at any time will return you to the User Dashboard.

Part 1

Platform Overview

Project Pages

Every project contains a set of pages that sit within it:

- Dashboard
- Documents
- Reports
- Users
- Settings

Not every user will have access to every page. Access depends on your role within the project.

The most important page is **Documents**. This is where the day to day work happens.

From the Documents page you can:

- upload documents
- add revisions
- search, filter and sort
- apply tags
- share documents
- access document level actions and tools

If you understand the Documents page, you understand how Capsa manages information.

The other project pages support this core function. Reports gives you visibility and audit. Users controls permissions. Settings manages project level configuration. Dashboard provides a high level overview.

Capsa Plus

The Plus icon is where additional actions live.

Rather than filling the screen with buttons, Capsa reveals tools only when you ask for them. Clicking the Plus icon in the header or beside a document will show the actions available in that context.

Think of it as the tool drawer. Open it when you need it.

Use the Capsa + to access further options.

Platform Overview

1.4 Creating or Joining a Capsa Account

Before you can access a project, you need a Capsa user account.

There are two ways to join:

Creating a New Account

1. Visit the Capsa website.
2. Click [Sign Up].
3. Enter your details.
4. Create a password.
5. Confirm your email address.

Once complete, you will be taken to your User Dashboard.

Joining via Invitation

If you are invited to a project:

1. Open the invitation email.
2. Click the link.
3. Create an account or log in to your existing account.
4. Confirm your email address if prompted.

The project will then appear on your Dashboard.

Each user must have a unique email address. Accounts cannot be shared.

If you're comfortable with these core areas, the rest of the system will feel straightforward.

Next

We'll look at Projects and how they are structured inside Capsa.

Projects

Everything in Capsa sits inside a project.

A project is a controlled workspace where your team stores documents, manages access, and maintains a clean audit trail. Projects are separate from one another. Documents, users, and reporting do not cross between projects.

Each project has:

- its own document set
- its own user list
- its own reporting history
- its own unique Capsa reference
- a single Project Owner

Think of a project as a digital job file with structure built in.

2.1 Create a Project

You can create a new project from the User Dashboard in two ways:

Option 1

Click the [Plus] icon in the main header and select [Create New Project].

Option 2

Click [Create New Project] within the dashboard welcome panel.

You will then be asked to enter the project details.

All data fields must be completed before you can proceed. These details can be changed later within [Settings], but it is worth choosing them carefully.

Projects

In particular:

- **Project Name** and **Project Location** are what all users will see when identifying the project in the Portal.
- If these are too long, the text may be shortened in the project boxes.
- A concise and clear naming approach helps everyone.

Once all fields are completed, click [Create].

You will then be taken to the subscription page.

1. Select your chosen subscription plan by clicking the relevant subscription box.
2. Click [Next].
3. Select either the monthly or annual billing option.
4. If applicable, enter a discount code in the discount box.

You will then see the final payment due and the payment details section, powered by Stripe.

Enter your payment details, confirm the [Terms] box, and click [Purchase].

Your project is now created and will appear on your Dashboard.

The user who creates the project is automatically assigned as the **Project Owner**.

The Project Owner:

- controls the subscription
- can transfer ownership
- has full administrative rights by default

2.2 Project Pages

When you enter a project, you will see a set of pages within it:

- Dashboard
- Documents
- Reports
- Users
- Settings

Not every user will see every page. Access depends on your role within the project.

Projects

Dashboard (Landing Page)

The Dashboard is the landing page for the project.

From here you can:

- see who owns and controls the project
- contact the project owner or controller if needed
- view project level information
- see a summary of data usage and remaining capacity

This page gives visibility and context before you move into documents or reporting.

Documents (Primary Page)

The **Documents** page is where the day to day work happens.

From here you can:

- upload documents
- add revisions
- search, filter and sort
- apply tags
- share documents
- access document level actions using [Plus]

If you understand the Documents page, you understand how Capsa manages information.

Other Project Pages

- **Reports** allows you to generate document and audit reports.
- **Users** controls project access and permissions.
- **Settings** manages project level information and configuration.

These pages support the core function of managing documents.

Projects

2.3 Project Details

Project information can be viewed and, depending on your role, edited within [Settings].

You may be able to update the following:

- Project Name
- Project Location
- Post Code
- Project Type
- Country
- Region
- Build Size
- Build Value
- Start Date
- End Date

Only users with appropriate permissions can edit project details.

Each project also has a unique Capsa reference. This reference is used when contacting support and for identifying subscriptions.

2.4 Starting Work in a Project

To begin using a project effectively, two things need to happen:

- Documents must be added
- Users must be invited

There is no enforced order.

Some teams upload key documents first to establish structure. Others invite contributors first and allow them to upload their own information.

Capsa provides the framework. Your team decides how to use it.

Certain features remain limited until both users and content exist within the project. Once both are in place, full functionality becomes available.

Projects

2.5 Access and Visibility

A project only appears on your Dashboard once you have been invited to it using your email address.

Being part of an organisation, company, or team does not automatically grant access to its projects. Access is granted on a project by project basis.

Being a member of one project does not give you access to another.

Within a project, what you can see and do depends on your role. Some users may only be able to view documents. Others can upload, edit, manage users, or run reports.

Your project dashboard, home to your projects performance and use data.

The home of Capsa, this is where you store and access all of your project documents and access the essential features.

Access downloadable reports on documents and users.

Manage and control all your users.

Control and tailor your project in the settings.

Next

User roles and permissions are explained in the next section.

Users & Permissions

Projects only work properly when the right people have the right level of access.

Capsa uses structured user groups to control visibility and responsibility within each project. Access is assigned per project and can be changed at any time by authorised users.

This section explains how roles function at a practical level and how to manage users inside a project.

For a full breakdown of user groups, access levels and recommended use cases, refer to the separate User Groups Guide.

3.1 User Groups Overview

Capsa uses the following user groups within a project:

- Owner
- Controller
- Lead
- Creator
- Viewer
- Partner

Each role controls what a user can see and do.

At a high level:

- **Owner** controls the subscription and has full access.
- **Controller** manages project setup, users and oversight.
- **Lead** manages delivery, documents and users within the project.
- **Creator** manages content only.
- **Viewer** has read-only access.
- **Partner** has restricted, controlled visibility to current information only.

User groups are designed around real project responsibilities. As a general rule, give users the least access they need to do their job well.

Roles can be updated at any time and changes take effect immediately.

For detailed page-level and feature-level access comparisons, refer to the User Groups Guide.

Users & Permissions

3.2 Add a User to a Project

An Owner, Controller or Lead can add new users.

To add a user:

1. Open the project.
2. Navigate to the [Users] page.
3. Click the [Plus] icon in the header and select [Add User].
4. Enter the user's email address.
5. Select the appropriate access group from the dropdown list.
6. If adding additional users, click the [Plus] icon again and repeat steps 4 and 5.
7. Once all users are added, click the [Tick] icon to confirm the invitation.

The invited user will receive an email prompting them to join Capsa or access their existing account.

New users must validate their email address by following the link in the email before full access is granted.

Each user must have a unique email address. Email addresses cannot be shared.

3.3 Suspend, Restore or Remove a User

An Owner, Controller or Lead can manage user access.

To manage a user:

1. Navigate to the [Users] page.
2. Locate the user.
3. Click the [...] icon next to their name.
4. Select [Suspend], [Restore], or [Remove].

Suspend

Suspending a user removes their access temporarily but keeps them listed on the project.

This is typically used where access needs to be paused while something is reviewed.

Restore

Restores access to a previously suspended user.

Users & Permissions

Remove

Removes the user fully from the project.

Removing a user:

- removes their access to this project only
- does not delete their Capsa account
- does not affect their access to other projects

If access needs to be reinstated later after removal, the user must be invited again.

3.4 Edit a User

An Owner, Controller or Lead can edit user details.

To edit a user:

1. Navigate to the [Users] page.
2. Locate the user.
3. Click the [...] icon.
4. Select [Edit].

You can edit:

- Organisation
- User group
- Role

All other personal details are controlled by the user themselves.

3.5 Personal Settings

Each user manages their own account settings.

To access your personal settings:

1. Click your avatar icon in the main header.
2. Select [Settings].

Users will see the following sections:

My Details

- Edit personal information
- Change email address
- Verify email address

Users & Permissions

My Projects

- View all projects you have access to
- Leave a project
- Go directly to a project
- Manage notification settings per project

Security

- Reset password

Sign In Activity

- View a full history of account sign-in activity
- Review access times and devices
- Monitor for any unusual or suspicious behaviour

Keeping user access up to date is one of the simplest ways to maintain control, clarity and security across a project.

Next

We move into **Documents**, which is where most of the day to day project activity takes place

Documents

The **Documents** page is the operational centre of a project.

This is where information is uploaded, structured, revised, searched and shared. Capsa does not use folders. Instead, documents are controlled through metadata, search, filters and tags.

Capsa is built around one core principle:
information should be stacked, not scattered.

Revisions belong with their original document. Versions should sit on top of each other, not live in different folders or be re issued as separate files. This keeps the audit trail clean and avoids confusion.

If user roles are the structure of a project, documents are the substance.

4.1 File Standards and Best Practice

Documents should always be uploaded as individual files.

Avoid:

- Combining multiple drawings or reports into one large file
- Re issuing previously uploaded documents alongside new ones
- Uploading bundles of historic information repeatedly

Each issue or upload should consist only of the new or revised individual files.

Uploading combined or duplicated files is a common cause of confusion and errors. Capsa is designed to manage structured information properly. Use it that way.

You can upload most file types to Capsa. However, preview functionality is optimised for PDF as standard.

Documents

Metadata and Intelligent Naming

Capsa reads embedded PDF metadata where available. If a document has been exported correctly, Capsa will pre fill fields such as:

- Discipline
- Author
- Reference
- Title

If the file metadata is incomplete or incorrectly formatted, you can manually enter or amend the information before uploading.

An added benefit:
Capsa automatically renames files using the metadata fields. When a document is downloaded, the file name will reflect the structured data, not the original file name from someone's desktop.

This helps maintain consistency across teams.

Content Responsibility

Users are responsible for ensuring that all uploaded documents:

- are suitable for the project
- comply with Capsa's terms of use
- do not contain inappropriate, unlawful or indecent material

If any content appears inappropriate or incorrect, users should report this immediately to the Project Owner, Controller, or directly to Capsa support.

4.2 Upload a Document

An Owner, Controller, Lead or Creator can upload documents.

To upload:

1. Navigate to the [Documents] page.
2. Click the [Plus] icon in the header.
3. Select [Add Document].
4. Drag and drop files into the upload area, or Click the [Cloud] icon to select files from your device.

Documents

For each document uploaded, a metadata panel will appear including:

- Discipline
- Author
- Type
- Reference
- Title
- Status
- Revision
- Issue Date

Capsa may pre populate some fields automatically. You can edit any field before confirming.

Upload Screen Controls

While preparing documents for upload, you can:

- Click the [Tag] icon next to an individual document to apply a document specific tag
- Click the main [Tag] icon at the bottom of the upload screen to apply a tag to all documents in that upload
- Hover over the preview icon to view a preview of the document
- Click the link icon to link the file to an existing document as a revision
- Click the remove icon to delete a file from the upload list without restarting the process

A document cannot be uploaded until all required fields are completed.

When all metadata is correctly entered, the status indicator will turn pink, confirming the document is ready.

Once all documents show ready status, click the [Upload All] button.

All project users will receive a notification that new documents have been added.

Notifications will always appear in the user's Dashboard and Documents page, and may also be sent by email depending on individual notification settings.

Newly uploaded documents will appear as unread within the project.

Documents

4.3 Add a Revision

Revisions should be stacked onto the original document, not uploaded as separate files.

To add a revision:

1. Locate the document on the [Documents] page.
2. Click the [Plus] icon next to the document.
3. Select [Add Revision].
4. Upload the updated file.

Alternatively, during multi upload, use the link or revision control to connect the new file to its existing document.

Capsa maintains a full revision history. The latest version is treated as current, while previous versions remain accessible.

This keeps information layered and traceable.

4.4 Edit Document Details

An Owner, Controller, Lead or Creator can edit document metadata.

To edit:

1. Locate the document.
2. Click the [Plus] icon.
3. Select [Edit].

You can update:

- Discipline
- Author
- Type
- Reference
- Title
- Status
- Revision
- Issue Date

Once complete, click the [Tick] icon to confirm changes.

Documents

4.5 Delete a Document

Only an Owner or Controller can permanently delete a document.

To delete:

1. Locate the document.
2. Click the [Plus] icon.
3. Select [Edit].
4. Click the delete or bin icon within the edit screen.
5. Confirm deletion.

Deleting a document removes it from the project and its revision history.

This action cannot be undone.

4.6 View and Interact with Documents

Clicking a document opens the full document view.

From document view, users can:

- Zoom the document
- Close the document
- Print
- Download
- Toggle between documents in full view without returning to the Documents page

Available functionality may vary slightly depending on browser.

Documents

4.7 Multiple Selection Tools

To perform actions on more than one document:

1. Click the [Multiple] selection control.
2. Select the required documents.
3. Choose the relevant action.

Bulk actions include:

- Download
- Print
- Transfer
- Notify
- Tag

This allows efficient handling of large document sets without repetitive clicks.

Capsa is designed to keep information structured, layered and searchable.

Next

We move into **Search, Filter, Tagging and Reporting**, which explain how documents are organised and tracked across a project

Search, Filter, Tagging & Reporting

Capsa does not rely on folders.

Instead, it uses structured metadata, search tools and reporting to organise information properly.

This is one of the primary reasons teams choose Capsa over generic file storage platforms.

Traditional storage systems rely almost entirely on file names and folder structure. That works until the project grows. Then it breaks.

Capsa allows you to search and filter using structured metadata, document status, revision history and tags. Even on large projects with significant document volumes, you can quickly find what you need and group information intelligently.

Information is structured once, and then it works for you.

5.1 Sorting Documents

On the [Documents] page, documents can be sorted by clicking any column heading.

Clicking a heading will sort alphabetically or numerically depending on the field. Clicking again reverses the order.

Sorting changes the display only. It does not change the document structure.

5.2 Search

Use the [Search] box on the Documents page to locate documents instantly.

As you type, Capsa filters results in real time.

Search works across:

- Reference
- Title
- Metadata fields
- Tags

Search, Filter, Tagging & Reporting

To return to the full list, clear the search field or use the reset control.

Because Capsa reads structured metadata, search results are more reliable than systems that rely only on file names.

5.3 Filter

For more controlled queries, use the [Filter] tool.

Filtering allows you to narrow documents using selected criteria such as:

- Discipline
- Author
- Status
- Revision
- Issue Date
- Tags

Select your criteria and confirm to update the list.

Filters allow you to group and review documents dynamically without moving or duplicating files.

To return to the full list, clear or reset the filter.

5.4 Tagging

Tags allow you to create flexible groupings of information without using folders.

Tags can represent:

- Packages
- Workstreams
- Phases
- Areas
- Client issue sets
- Any logical grouping required by the project

To apply a tag to a single document:

1. Click the [Plus] icon next to the document.
2. Select [Tag].
3. Choose an existing tag or create a new one.
4. Confirm.

Search, Filter, Tagging & Reporting

To apply tags to multiple documents:

1. Use the [Multiple] selection tool.
2. Select the documents.
3. Click [Tag].
4. Apply the chosen tag.

Tags can then be used within Search or Filter to retrieve grouped information instantly.

Tags create structure without creating complexity.

5.5 Reporting

Capsa brings your project's paper trail, registers and insights together in one place. Use Journals to trace activity and Registers to track documents.

Reports are accessed via the [Reports] page within a project.

The available report types include:

Access Journal

View the full access history for all users on a specific document.

This provides a traceable record of who accessed what and when.

Current Register

Generate an up to date issue register showing current revisions and document status.

This reflects the live state of the project.

Custom Register

Build a tailored register by filtering documents using your chosen criteria.

Your filter selection determines what appears in the register.

Full Register

Create a complete register including all current revisions and their full issue history.

This provides a comprehensive project level record.

Search, Filter, Tagging & Reporting

Reports can be generated and downloaded as Excel files for further review, distribution or record keeping.

Because Capsa structures information properly at source, reporting becomes immediate. There is no need to manually build or maintain separate registers.

Capsa removes the need for duplicated spreadsheets, disconnected folders and manual audit trails.

Next

We move into **Sharing and Notifications**, covering how information is distributed both within and outside the project.

capsa

Sharing & Notifications

Capsa controls how information moves.

Documents can be shared internally with project users or externally with selected recipients. Notifications ensure the right people are alerted without losing traceability.

Unlike sending attachments by email, sharing in Capsa keeps documents structured, version controlled and auditable.

6.1 Notifications Overview

When documents are uploaded or actions occur within a project, users receive notifications.

Notifications are visible in several places across the Portal.

User Dashboard (All Projects View)

On the **User Dashboard**:

- The welcome panel provides an overview of all notifications combined across all projects.
- Each project box displays the number of new notifications for that specific project.

This allows users to quickly see which projects require attention.

Project Dashboard

When you enter a project:

- The project welcome panel shows the number of new notifications within that project.
- It also shows the number of new documents that have not yet been viewed.

This provides a quick status summary before navigating to documents.

Documents Page – Notifications Panel

On the **Documents** page:

- Click the [Notifications] icon in the main header to open the notifications panel.

Sharing & Notifications

This panel displays:

- A list of all notifications
- A status indicator showing whether each notification has been viewed
- A [Mark All as Read] option to clear notifications

It works in a similar way to an email inbox.

Notifications remain visible until marked as read.

Document Level Status Indicators

On the **Documents** page:

- Any document that has not yet been viewed by the user will display a status indicator next to it.
- Once the document is opened, the status indicator disappears.

This makes it easy to identify newly issued information at a glance.

Notifications always appear within the Portal.

Email notifications may also be sent depending on the user's personal notification settings. Email preferences can be adjusted in personal [Settings].

6.2 Notify (Remind) a Project User

If you need to draw attention to specific documents, use the [Notify] function.

To notify a single document:

1. Locate the document.
2. Click the [Plus] icon.
3. Select [Notify].
4. Choose the user from the dropdown list.
5. Add an optional message.
6. Confirm to send.

To notify multiple documents:

1. Click [Multiple].
2. Select the relevant documents.
3. Click [Notify].
4. Choose the user(s) and confirm.

Sharing & Notifications

The recipient will receive a notification within Capsa and, depending on their settings, by email.

This keeps communication attached to the document rather than separated into email threads.

6.3 Transfer (External Sharing)

To share documents with someone who is not a project user, use [Transfer].

This creates a controlled sharing link for selected documents.

To transfer a single document:

1. Click the [Plus] icon next to the document.
2. Select [Transfer].
3. Enter the recipient's email address.
4. Confirm to send.

To transfer multiple documents:

1. Use [Multiple] to select documents.
2. Click [Transfer].
3. Enter recipient details.
4. Confirm.

Recipients do not gain access to the project.

They can only:

- View the documents shared
- Download those documents

They cannot see other project content, reports or history.

This is the recommended method for issuing controlled document sets to clients, consultants or third parties who are not active project users.

Sharing & Notifications

6.4 Sharing from the App

Within the Capsa App, documents can be shared directly from the document view screen.

The App is designed primarily for viewing, so sharing functionality is simplified.

For full control over transfers, tagging and bulk actions, use the Portal.

6.5 Managing Notification Preferences

Users control how they receive email notifications.

To manage preferences:

1. Click your avatar icon.
2. Select [Settings].
3. Adjust your notification settings per project.

In-app notifications form part of the project record. Email notifications can be adjusted in your personal settings.

Sharing and notifications in Capsa ensure that information is both visible and controlled.

Next

We move into **Billing & Subscription Management**, covering ownership and payment related functions.

Billing & Subscription Management

Billing in Capsa is managed per project, not per organisation.

Each project has its own subscription and its own billing record. Subscription control does not apply across multiple projects.

Every project has a single **Project Owner** who is responsible for the subscription.

7.1 Access Billing Settings

Billing is accessed from within the project.

To access billing:

1. Open the relevant project.
2. Navigate to the **Project Settings** page.
3. Select the **Billing** section.

Only the Project Owner can access or edit billing details.

From the Billing section, the Owner can:

- View the current subscription plan
- See cost and data allowance
- Review usage
- View billing history
- Download invoices
- Update payment details

Payment processing is handled securely via Stripe. Capsa does not store card details directly.

7.2 Change Project Owner

The Project Owner can transfer ownership to another user on the project.

The new owner must already be a user on the project. If they are not, they must be added before ownership can be transferred.

To transfer ownership:

1. Open the project.
2. Go to **Project Settings**.
3. Navigate to **Billing**.
4. Click the edit icon next to the Project Owner.
5. Select the new owner from the dropdown list.
6. Click [Update] to initiate the transfer.

Billing & Subscription Management

The selected user will:

- Receive an email notification.
- See a transfer panel the next time they access the project (while logged in).

Ownership cannot be accepted via email alone. The user must be logged into Capsa.

The new owner can:

- Accept the transfer
- Reject the transfer

If the transfer is rejected:

- Ownership remains unchanged.
- The existing Owner is notified.
- A new transfer must be initiated if required.

If the transfer is accepted:

- The new owner will be taken to a billing panel.
- They must enter new billing details.
- They must confirm the subscription.

Only once billing details are completed and confirmed does ownership officially transfer.

Until that point, the original Owner remains fully responsible for the subscription.

There can only be one Owner at any time.

7.3 Change or Cancel a Subscription

The Project Owner can change or cancel a subscription from:

Project > Project Settings > Billing

Within the Billing section:

1. Click the edit icon next to the subscription plan.
2. Review the current subscription, including cost, data allowance and usage.
3. Select the new subscription option if required.

This is also where a subscription can be cancelled.

Cancellation Behaviour

When a subscription is cancelled:

- The project remains accessible until the end of the current billing period.
- A warning header will appear in the project, notifying all users of the upcoming end date.
- The Project Owner can restore the subscription at any time before the billing period ends.

If the subscription is not restored before the end date:

- The project will be deleted.
- All access will be stopped.

Billing responsibility and project access remain with the Project Owner until cancellation is fully completed.

Billing in Capsa is structured so that responsibility is clear, access is controlled, and project collaboration is not disrupted.

Next, we move into Policies, Data & Compliance, covering terms of use, data handling and GDPR responsibilities.

Billing & Subscription Management

7.4 Data Allowance & Capacity Limits

Each project has a set data allowance based on its current subscription.

You can view the project's data usage and remaining capacity within:

Project > Project Settings > Billing or on the project dashboard.

When a project reaches its data limit:

- Users can still access the project.
- Existing documents remain fully viewable.
- Reporting and other features remain available.
- New documents and revisions cannot be uploaded.

Upload functionality will be restricted until additional data capacity is added.

Only the Project Owner can increase the data allowance by updating the subscription within the Billing section.

Once the subscription or data allowance is increased, upload functionality is restored immediately.

To avoid disruption, Project Owners should monitor data usage periodically, particularly on large or long running projects.

Policies & Data References

This Help Guide explains how the Capsa system works. It does not aim to restate our wider legal terms, data policies or compliance documents.

For legal, privacy and compliance matters, please refer to the documents below.

8.1 Terms of Use

The latest version of our Terms of Use is available on the Capsa website.

Capsa Terms

These set out:

- Permitted use of the platform
- User responsibilities
- Acceptable content standards
- Subscription terms

8.2 Privacy, Data & GDPR

The latest versions of our Privacy Policy, Data Policy and GDPR information are available on the Capsa website.

Capsa Privacy

Capsa exists to store and structure project data, but responsibility is shared.

- Your organisation or employer acts as the **Data Controller**.
- Capsa acts as the **Data Processor**.

While the Project Owner is responsible for managing project access, we believe everyone using Capsa should play their part.

Our **Capsa Code** sets out the principles we expect users to follow — including keeping information clear, respecting privacy and using the platform responsibly.

Access document here

Policies & Data References

8.3 Sub-Processors

Capsa works with a small number of trusted providers to deliver hosting, storage, payments and support services.

A full and current list of these providers is available in our **Sub-Processor Register**.

This register explains:

- Who helps us run Capsa
- What services they provide
- What data, if any, they process

Capsa Processors

For the most up to date versions of all policies and compliance documents, refer to the Resources section of the Capsa website.

Project Support & Assistance

Capsa provides the platform.
Project administration sits with the project team.

As a general rule:

- The **Owner**, **Controller** and **Lead** are responsible for managing the project.
- Capsa Support is available for technical or platform related issues.

If your query relates to documents, permissions, responsibilities or project content, it should first be raised within the project team.

9.1 Contacting the Project Team

Within each project, you can see who owns and controls it.

On the **Project Dashboard**, the welcome panel displays the Project Owner and Controllers.

From this panel, you can send a direct message or admin request to them, including a written message explaining your query.

This is the correct route for:

- Document clarifications
- Permission questions
- Access requests
- Project specific concerns
- Content disputes

Project issues should be resolved at project level wherever possible.

9.2 Raising an Admin Request on a Document

If your issue relates to a specific document:

1. Navigate to the [Documents] page.
2. Locate the relevant document.
3. Click the [Plus] icon next to the document.
4. Select the admin request option.
5. Enter your message explaining the issue.
6. Submit.

This sends a notification to the Project Owner and Controllers linked directly to that document.

This keeps queries traceable and attached to the correct file.

Project Support & Assistance

9.3 Contacting Capsa Support

If you believe the issue is technical or platform related, you can contact Capsa Support directly.

From the [Documents] page header:

1. Click the [Plus] icon.
2. Select the [Help] option.

This will generate an email to Capsa Support.

Capsa Support should be contacted for:

- Technical errors
- Platform bugs
- Login or access failures
- Security concerns
- System behaviour that does not match this guide

For additional guidance, FAQs and learning resources, visit the Learn and Resources sections on the Capsa website.

Keeping project issues within the project team and technical issues with Capsa ensures queries are resolved quickly and efficiently.

capsa

Use Capsa properly.
Keep information clear.
Keep projects under control.

For further guidance, updates and support, visit the Capsa website.

www.capsaapp.com