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DOCUMENT PORTAL

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Virtual Cabinet
Document Portal User Guide

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Contents / Introduction

The Virtual Cabinet® Document Portal is a cloud-based document portal with a difference. Fully integrated with our Virtual Cabinet® Document Management System, the Virtual Cabinet® Document Portal allows us to publish and send documents to clients, suppliers, partners, colleagues and yourself in a simple, secure and audited manner. The Virtual Cabinet® Document Portal delivers an easy to use, comprehensive and elegant mechanism by which we can significantly improve customer service and retain far greater control and visibility over the life-cycle of the documents. This document is a simple guide to accessing, viewing and signing documents sent via the Portal.
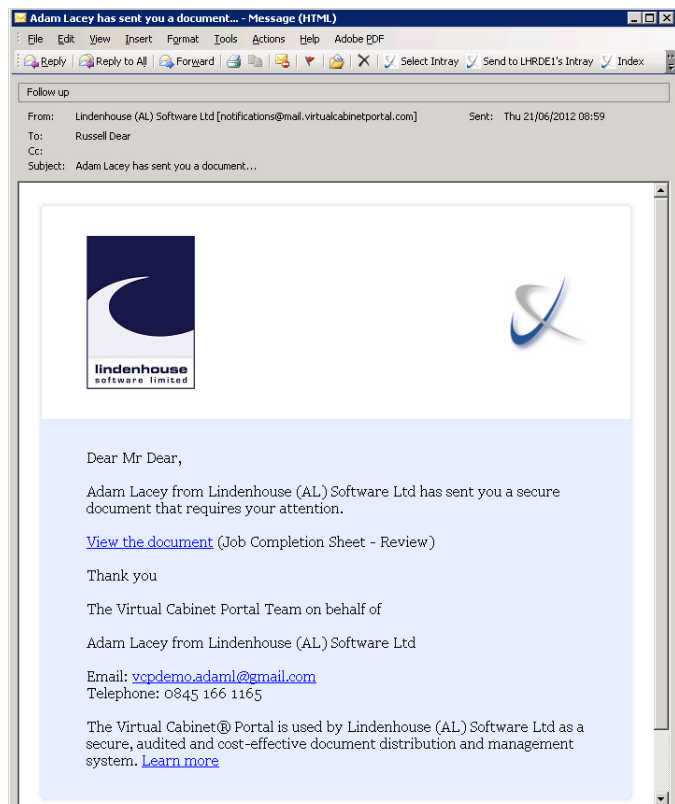
What to expect when publishing a document

1

When a document is published to a client using the Virtual Cabinet Portal, the client receiving the document will receive an email with a link to the document. If the document is required to be signed, the email will contain an "Authentication Code" and will look similar to the screen on the right (this code is for signing the document and not the password for your Portal account).
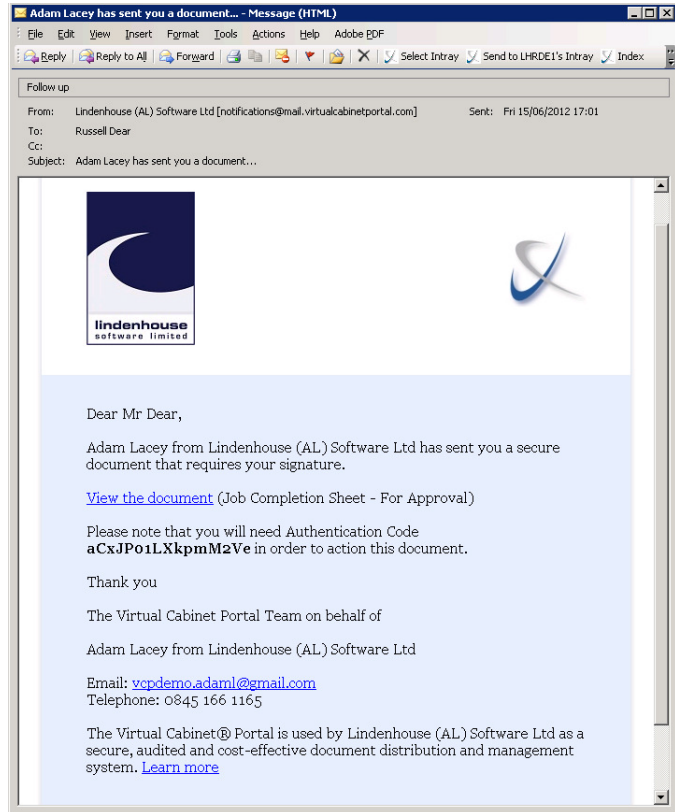
2

If the document is not required to be signed, the email will look like the screen on the right.

What to expect when publishing a document

3

If this is the first time you have received a document from the Portal, the screen on the right will appear. You will need to create an account to hold the published documents.

4

Once the relevant information has been completed and the Activate Account has been clicked, you will be asked to log in with the details you have just set up. You will then be linked directly to the document. Alternatively, if it is not the first time you have published or received a document, you will just need to log into the Portal using your previously created account details.

Activate your account

Fields marked with * must be entered.

E-mail address *

Note: this must be the e-mail address where you received the activation e-mail

Password *

Strength: Very poor

Confirm password *

Title * Mr

Forename * Russell

Surname * Dear

Landline telephone number

Mobile telephone number

Country United Kingdom

Tick to confirm that you agree to the Terms and Conditions *

Tick to confirm that you are 18 or over *

Type the text shown in the image *
Change the image

VERIFY
Norton SECURED
powered by VeriSign

Activate account
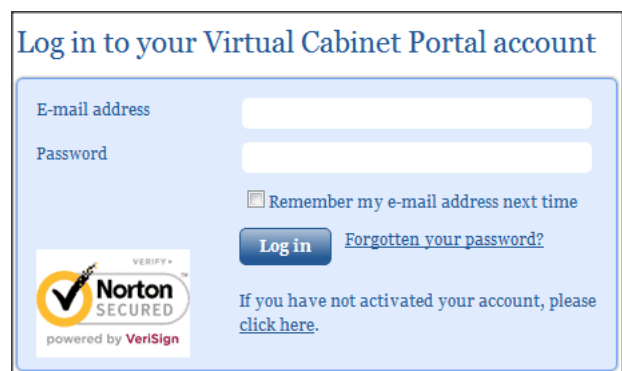
What to expect when publishing a document

5

The example below has been published to the Portal and requires the end user to digitally sign the document using the code provided in the first email. This will need to be copied from the email and pasted into the "Authentication code" field on the document viewer.
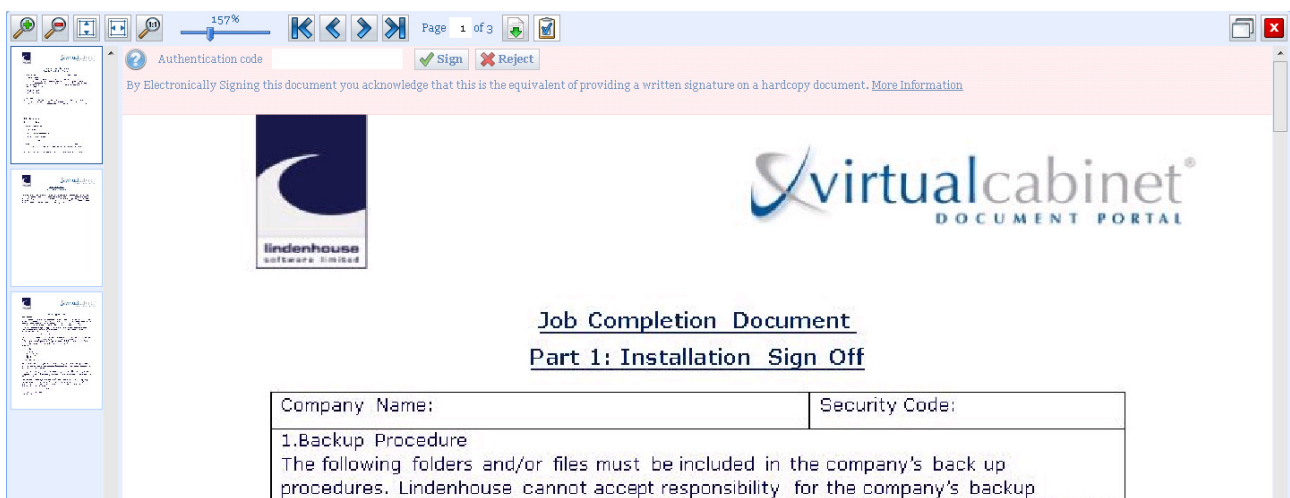
6

If the original email does not have an Authentication code, then the document does not require a digital signature and the Authentication code field will not be present on the viewer. Users can also log into the Virtual Cabinet Document Portal by visiting the Portal site – www.virtualcabinetportal.com.

What to expect when publishing a document

7

If more than one document requires viewing you will
be displayed the message on the right.

8

Once logged in, you will be presented with your Portal area where you can view the documents received,
digitally sign and download them.

Troubleshooting guide
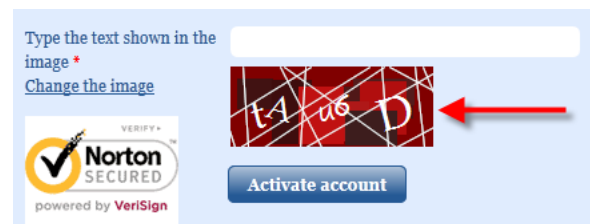
Activating your Account

If you are having difficulty activating your Portal account or are receiving an error, please make sure that the email address you are using is the same email address used when the document was published and check all your details are correct. Then check the following:

A Your password MUST be at least 7 characters long and contain at least one upper case letter, one lower case letter and one digit.

Password *

●●●
Strength: Very poor
Your password must be at least 7 characters long and contain at least one upper case letter, one lower case letter and one digit
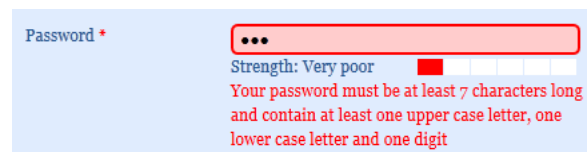
B Make sure that the text in the security image matches before Activating (this is not case sensitive).

Type the text shown in the image *
Change the image

Norton SECURED
powered by VeriSign

Activate account

C If this error appears, it could mean that your activation link has expired (5 days from email received). You will need to request a new activation email by clicking on "here" as instructed by the message.
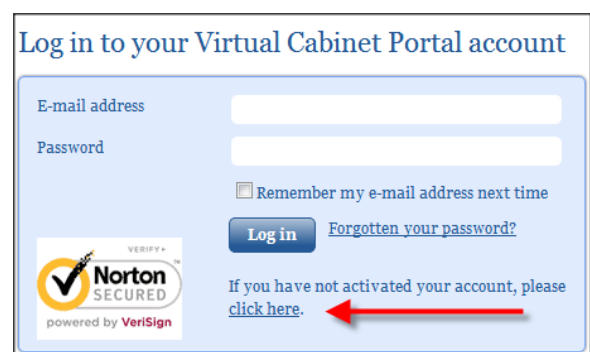
Or

Activate your account

Your account could not be activated. Please click here to try again.

D When using the login page on the website (www.virtualcabinetportal.com) you can request a new activation email via the link shown on the right.

E If all else fails please try a different web browser if available.

Log in to your Virtual Cabinet Portal account

E-mail address
Password

☐ Remember my e-mail address next time

Log in   Forgotten your password?

Norton SECURED
powered by VeriSign

If you have not activated your account, please click here.

Troubleshooting guide

Logging in to the Portal directly

If your account is already active, the link in the email will direct you to this screen. Again this needs to be the email address that was used when publishing the document and the password you set when activating your account. If you are having trouble logging in, you can reset your password by clicking "Forgotten your password?" and this will allow you to send a reset request to the email address entered.