



FLORENCE QUICK REFERENCE: Document View







Tools

1. Search Bar

Search all areas of Florence which you have access to by document or folder name

3. Manage Document

Drop down with multiple action options for the selected file(s) – This may change depending on your Role permissions.

- Assign Tags
- Assign to Timelines
- Create Task
- Delete
- Download
- DuplicateMove
- Mark document as PHI
- Request Signatures

5. Annotate

Highlight, redact, or add text to the document.

6. Sign Document

Sign by Addendum or Stamp on the document

7. Document Navigation

Rotate the document, zoom in, or skip to a specific page.

9. Tasks

View and manage all open tasks connected to this file.

11. Expiration Date

See and update the expiration / due date for this file.

File Information

2. File Tree / Navigation Bar

Click on the downward triangle to quickly view and navigate to all parent folders, as well as key Florence features including:

- Announcements
- Reports
- Global View
- Dashboard
- Binders (home screen)
 - My Downloads

4. Version History

Drop down menu which displays the option to upload a new version, as well as a document version history with brief description of changes. Click the version you which to view.

8. Document Name

View and update the file name

10. Related Documents

Links to shortcuts to the open document, and/or the email body and other attachments for files imported by email.

12. Upload details

Displays the original file name, as well as when and how the document was uploaded.

13. Audit Trail

View all actions that have been taken on the document. Download to excel to filter by User, action type, date, etc.

14. Signature information

Displays all current signatures on the document, as well as outstanding signature requests.

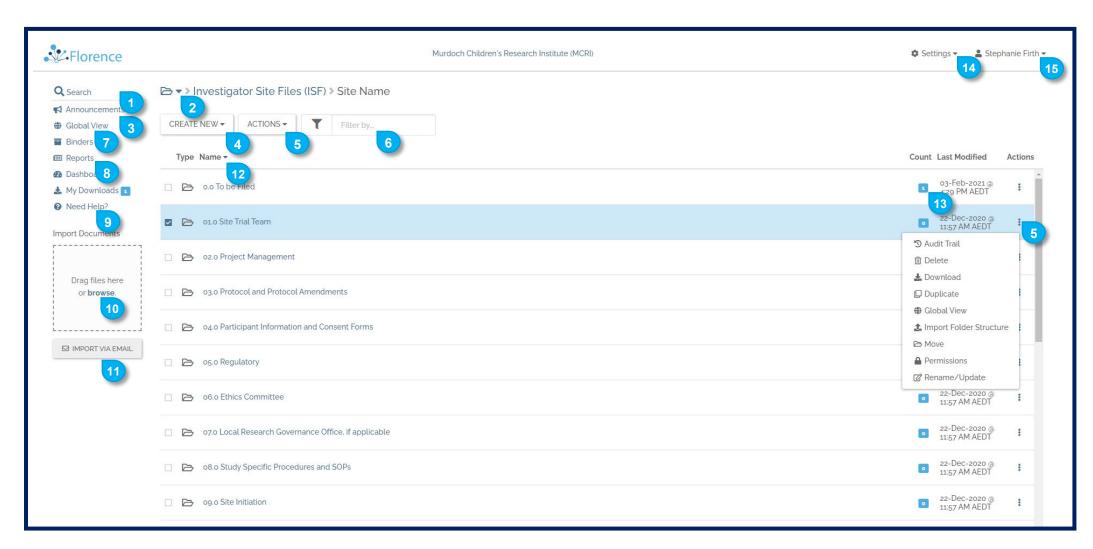
15 Tags

All 'Tags' which have been connected to the document.





FLORENCE QUICK REFERENCE: Navigation Screen



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Navigation

1. Search Bar

Search all areas of Florence which you have access to by document or folder name.

2. File Tree

Click on the downward triangle to quickly view and navigate to all parent folders

6. Filter

View files in the currently open location which contain a specific word or phrase

7. Global View

An overview of all folders, documents, and placeholders viewable to you in Florence

12. Sort By

Sort by type, name, no. of documents, or when the file was last modified by clicking on the bolded headings.

Tools

3. Announcements

Send messages to Florence Users which link directly to a File. Create a folder, placeholder, Log, or shortcut to a document Messages can be sent in bulk based on Role.

8. Reports

Generate Reports based on a range of in-built metrics such as Drop down with multiple action options for the selected due dates, expiry dates, pending signatures, outstanding tasks, and assigned tags and labels.

9. Need Help?

Who to contact for support, along with a repository of resources to help you use Florence.

14. Settings

Drop down with multiple action options for the selected file(s) – This will change depending on your Role Permissions.

- Manage Notifications
- Permissions Overview (by User or Role)
- Manage Florence Roles
- Manage Tags
- Invite and Manage Florence Team Members

15. User Profile

Manage your Signing PIN, marketing communications from Florence, and view your audit trail within Florence

File Management

4. Create New

filed elsewhere in Florence

5. Actions

file(s) – This will change depending on the type and number of file(s) selected, and your Role Permissions.

- Assign Tag Document / Placeholder only • Delete
- Assign to timeline Document / Placeholder only • Duplicate
- Create a Shortcut Document / Placeholder only
- Create a Task Document / Placeholder only
- Request Signatures Document only
- Update Expiration Date Document / Placeholder only
- Update Due / Expiry Date Document / Placeholder only

- View audit trial
- Download
- Rename/Update
- Move
- View Overview of contents in 'Global View' Folder only
- Import Folder Structure Folder only
- Mark as containing PHI Document only

10. Upload Documents

Drag and drop files into this square, or click 'Browse' to search your computer

11. Email to Folder

See the open locations unique email address, which you can use send files via email.

13. File count

Shows how many documents and placeholders are in the folder