

Quick Facts: Navigating the Collaborate Portal

Main Portal Link:

<https://lncoca.sharepoint.com/sites/FYI-loren-nancke-collaborate>

The **"home page"** is easily accessible from every section of the site, ensuring seamless navigation. It can be found in the top left-hand corner. At the bottom of the home page, you will find a convenient section displaying your most recent documents. This feature allows you to quickly pick up where you left off and stay updated on the latest activities within the platform.

Navigate to the **"Documents"** section to find a well-organized vault. Here, your files are categorized into personal and corporate folders, organized by year. This structure simplifies document retrieval and ensures that your information is stored in a systematic manner.

Need to add new documents? Simply head to the **"Upload"** folder within the "Documents" section. This designated space streamlines the process of adding files, providing a hassle-free way to contribute to collaborative projects. It is important to be aware that the documents you upload disappear from the folder 20-45 seconds after, once the system has processed it. The documents move to the processed folder. Once we receive your upload, we will send you a confirmation email within 3 business days.

Adding files to the Upload folder

To upload files using New Collaborate, you will need to use the following process:

1. Open the Client Share Folder. If you have been added to multiple folders, a separate folder will be displayed for each one.

Advice that counts

2. Open the Upload folder.
3. Add one or more files by using the Drag and Drop method, or by clicking the Upload - Files option and locating the files on your computer.
4. Close the folder or continue using the New Collaborate site. No further action is required.

****The document disappears from the upload folder 20-45 seconds after you upload, once the system has processed it. The documents move to the processed folder. Once we receive your upload, we will send you a confirmation email within 3 business days.****

If you upload a folder, the files will still be uploaded and removed, however, the folder will not be deleted. You will need to manually remove the folder after the files have been uploaded.

****If you are using an iPad, be sure to turn your device to landscape view instead of portrait. Portrait view does not display the upload folder.****

Questions? Get in touch.

T. 604-904-3807

E. accountants@lorennancke.com

W. lorennancke.com/contact