



How to use sharefile during peer review- an agency guide

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## Quick links

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How to download from the sharefile [website](#)

How to upload from the sharefile [email](#)

How to upload to the agency folder via the sharefile [website](#)

## What is sharefile?

Sharefile is a file sharing platform from Citrix which allows you to securely upload and download files. The Scottish Legal Aid Board/Slab runs its version of the platform for Slab's internal and external customers providing technical support. The information is stored on Slab's own servers. This replaces what was previously used by Slab for file sharing. It is an easy to use platform and you will receive Sharefile emails, which has links you can click, to your inbox from the SNSIAP team via Sharefile. It operates in accordance with GDPR and if uploading files, a data sharing agreement will require to be completed.

## How will the agency be using sharefile during peer review?

In the peer review process, you will:

- Issued with this user guide at the seminar and in your sharefile folder. You can also access this via the website.
- Have access to copy of the timetable, user guides, guidance notes and other useful documents in your folder for you to use during peer review
- Receive/download your timetable from your sharefile folder and the peer review questionnaire/prq
- Complete the peer review questionnaire/ prq and upload it to sharefile
- Receive/download your case selection grid/csg and data sharing agreement from your sharefile folder.
- Complete the case selection grid/csg and data sharing agreement, and upload them via sharefile
- Complete the topic case selection grid and upload it to your sharefile folder along with case files if you are uploading cases.
- Receive emails when you are you required to meet deadlines e.g. an email reminding you that your prq is shortly due.
- The Moderation Committee decision and reports when the final decision is made on your peer review. This folder will be restricted access to the agency manager only.

You will be provided with examples of these documents and information on how to complete these at the training seminar you will be invited to attend prior to the peer review slot.

Please check our website or emails you have been sent if you have been invited to the seminar and not yet booked your place.

We will send all the documents to complete via sharefile. You will not receive any documents attached to emails for completion.

We will ask you to send all documents via uploading to sharefile. Your agency is not to email any documents for peer review as sharefile is a more secure platform and is easier to administer. If you do send documents by email, you will be asked to upload these to your sharefile folder.

### How does the agency get a sharefile log in?

You will should already have been sent log in details from the SNSIAP team for the initial peer review contact. This will allow you to set up a password. If you have not you will be asked to create a password when you first use Sharefile.

If you do require more than one log in for other members of staff or have not received an initial log in, please contact [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) to arrange this.

We can add more than one user from an agency and will email all the members who have user details with the same requests during the peer review from sharefile.

We will set you up with a user account for each user and an agency folder before your peer review slot begins. The agency folder will be accessible to all users.

Each user will have their own login and their own password- which they create themselves. There will not be one generic login for each agency.

Once added all users will receive sharefile emails from the SNSIAP Team.

### Who should the agency get added as users?

We will add initially the person who has contacted us for the peer review slot as a user. If this person is no longer involved with the peer review process, you must inform us immediately by emailing the new contact details to [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

With sharefile, we can provide user access and create a distribution group for more than one user. This means you can add any member of staff who is going to be involved with the peer review process and will need access to sharefile. The agency group will then all receive emails from the SNSIAP team about peer review at the same time.

You can either provide the names of all the staff members on the prq or email us separately. We need their name, job title and their work email address.

Once we have added all the users, all users will get emails from us via sharefile allowing them access to complete that stage of the peer review process. They set up their own log in and access the agency folder.

It is helpful to add as many users as you can which are working on the peer review process as if a person is absent, then you still have access to your agency folder. It is also helpful if you have more than one team in your agency uploading files simultaneously e.g. a benefit team and money and debt team.

If you don't want teams each seeing others cases, for example money and debt team seeing the uploaded benefit cases, we can restrict access for the staff members to only see their topic folder. If you like us to do this, please contact us.

We can easily add users- just email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) to discuss this or telephone the SNSIAP Team.

### **How can the files be uploaded or downloaded via sharefile?**

There are two methods or options for you to upload/download files:

- You can log into the sharefile website via the website link provided by slab and upload/download it via this website
- Click on the sharefile link in the email you are sent and then download/upload the files as instructed to in the email. This gives you direct access into your agency folder.

Each option takes the same amount of time, either way can be used and it depends on which way you find easier. You will always have both options available to upload and download files throughout peer review.

If you have any technical difficulties, please contact the SNSIAP team via email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) for assistance. Do not try to rectify any technical errors with sharefile platform yourself as slab can provide technical assistance with sharefile.

### **What if the agency needs technical assistance?**

Please contact the SNSIAP team via email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) with any queries or difficulties you have in using the Sharefile platform. The team will either answer your query or if needed contact Slab's IS team. Slab IS provides support for the platform. SNSIAP team should always be contacted for technical assistance and you should not try to fix any errors with sharefile yourself as the Slab's IS team administers this platform.

Please do not reply to the sharefile email direct with technical queries. The snsiap email address should be used which is [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

You should always email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) do not reply to the sharefile emails direct as this could delay the team in responding to your query.

Below are instructions on how you undertake uploading and downloading.

## Downloading the documents needed to complete for peer review

First you need to download documents for peer review.

You can download the documents from Sharefile:

- via the Sharefile email which has a link for you to click
- Or by logging into the Sharefile website.

This guide is the technical guide on how to use the platform. If you have queries on how to complete the documents, please refer to the guidance notes on our Slab website or which are available in your Sharefile folder.

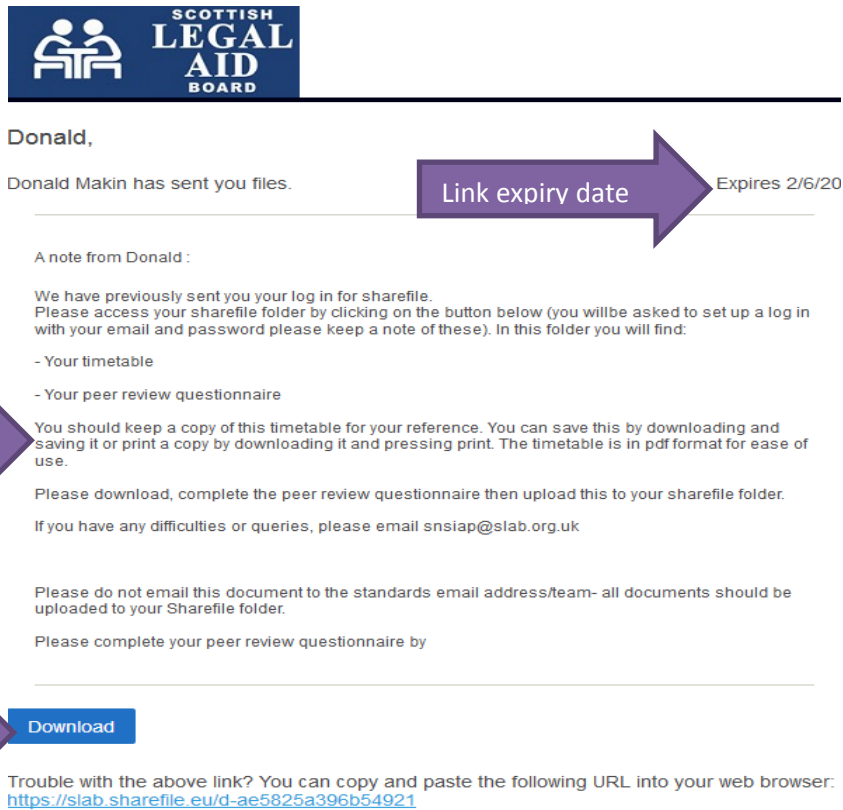
### How to download files from a Sharefile email

1. Click the link in the email from the SNSIAP team. The link may appear as a ShareFile link or a Download button. This email will have sharefile, Slab and SNSIAP on the email. The email will clearly explain what you have to complete.

There is a copy of the email on the next page:

- There is a date on the top right corner which is the date the link expires. If you do not click the link by this date, you will no longer get access to this document.
- Instructions on what to complete.
- A blue download button to download the documents

Sharefile is a secure file sharing platform- this means it is ok for you to download the documents we send to your pc.



Donald,

Donald Makin has sent you files. **Link expiry date** Expires 2/6/20

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A note from Donald :

We have previously sent you your log in for sharefile.  
Please access your sharefile folder by clicking on the button below (you will be asked to set up a log in with your email and password please keep a note of these). In this folder you will find:

- Your timetable
- Your peer review questionnaire

You should keep a copy of this timetable for your reference. You can save this by downloading and saving it or print a copy by downloading it and pressing print. The timetable is in pdf format for ease of use.

Please download, complete the peer review questionnaire then upload this to your sharefile folder.

If you have any difficulties or queries, please email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

Please do not email this document to the standards email address/team- all documents should be uploaded to your Sharefile folder.

Please complete your peer review questionnaire by

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**Click to download** [Download](#)

Trouble with the above link? You can copy and paste the following URL into your web browser:  
<https://slab.sharefile.eu/d-ae5825a396b54921>

2. On the download page, you can download the files/documents you have been asked to complete. You will be asked to complete your log in details before getting access to this page to download the documents.

Remember each user added has their own log in and password. There is not one general log in for an agency. If you forget your password, use the link on the Sharefile site to reset it.

3. Use the blue Download button to download the files. When downloading files from ShareFile, the files will be downloaded to your computer. It will show you what folder the documents have downloaded to.
4. Once downloaded, you should complete the documents by the deadline provided on the email and upload them to sharefile. Please email the team once you have done this, and if you have any queries or have technical issues by emailing [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

This guide tells you in a later section how to upload documents.

**Please do not email documents once completed to the team- all documents must be uploaded to sharefile.**

## How to download files using the ShareFile website

1. Go to the sharefile website. The SNSIAP team have provided you with the link. Here is the link if you require it again to access Sharefile <https://slab.sharefile.eu/> on the home page you need to log into the platform with the login details we previously sent and your password. If you forget your password, use the reset password link.

2. Click into your agency folder. This is the folder with the name “SNSIAP: followed by the name of your agency”.

Your agency folder will be located in the **Shared Folders** section. . This can be found on the dashboard- which is the first page you see when you log into sharefile. Shared folders is on the left of the sharefile screen.

This is the folder you will use to download documents, upload documents and view guidance we have uploaded for you to use during peer review.

The document (s) will be there for you to download and complete. They be titled with your agency name followed by what the document is e.g. “agency name case selection grid”.

3. To download the document, **right-click the file to tick/ check the box and select the Download option.**

The screen will be similar to the screen below:





If you have more than one document to download, you can click/tick the checkboxes on the left side of each file or select all and click download. This will download all the documents you have to complete.

You may find different format. We will send documents in both word and pdf of the same document. You only have to complete one format of the document.



## Files from Donald Makin at The Scottish Legal Aid Board

Select All Sort By Name ▾ ☰ ⋮

<input type="checkbox"/>		<input type="checkbox"/>	
SNSIAP peer review que...		SNSIAP peer review que...	
270 KB		118 KB	

0 Items Selected Download

4. The file(s) will be downloaded to your computer. Depending on your browser settings, you may be prompted to select where files should be downloaded to.

Once downloaded, you should complete the documents by the deadline provided and upload them to sharefile. Please upload these in the original format of the document. The instructions on how to upload the documents are below.

Sharefile will issue an automatic email update to the SNSIAP team once you have downloaded and uploaded documents to your agency folder to alert the team. You do not need to send a separate email to inform the team you have completed the documents.

If you do miss the deadline on your timetable, the link will expire and you should contact the SNSIAP team by email or telephone to discuss this.

If you have any queries or have technical issues by emailing [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

**Please do not reply to the sharefile email direct with any queries. The snsiap email address should be used [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)**

**Please do not email documents to the team- all documents must be uploaded to sharefile. If you do email documents you will be asked to upload these to sharefile.**

## Uploading to Sharefile

There are two options or methods to upload once the documents are completed or when you have to upload your case file.

You can:

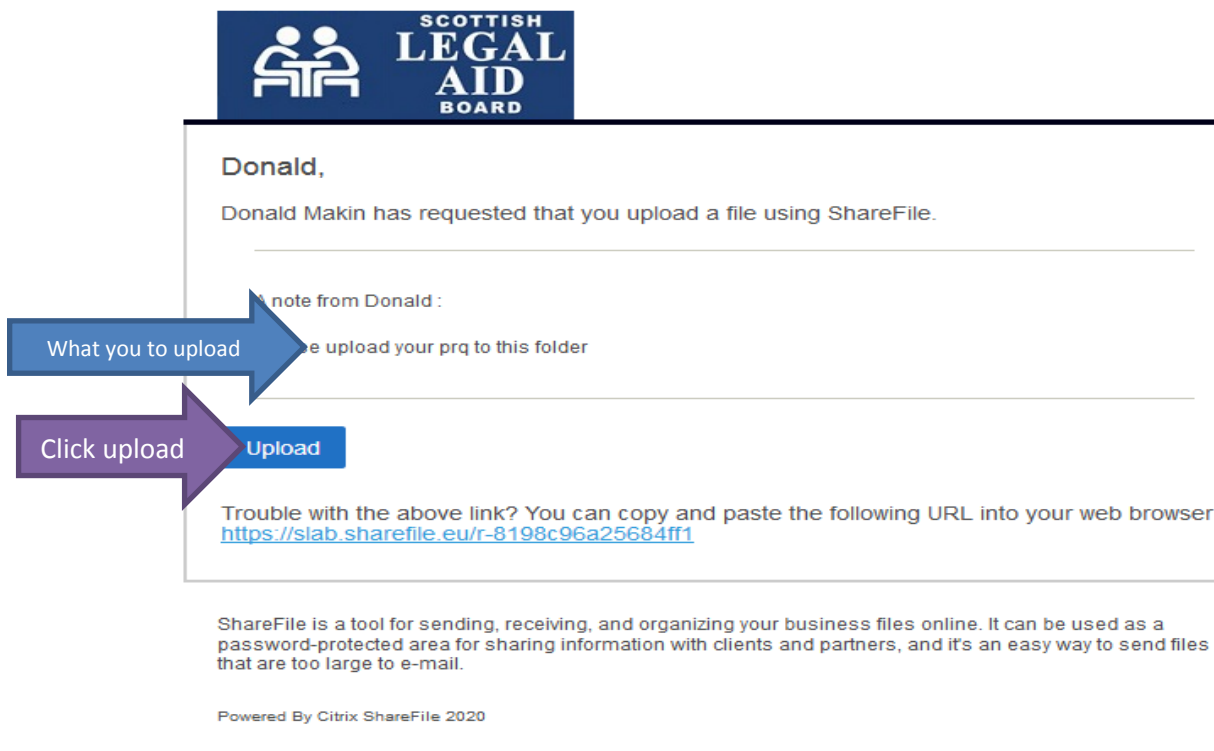
- upload by clicking the link in the Sharefile email
- Or upload by logging in via the Sharefile website. <https://slab.sharefile.eu/>

### How to upload files when your agency receives a Sharefile email

We will usually issue a reminder to agencies to ask them to upload completed documents and this will contain a link to upload the documents.

The way you upload from the email is similar to downloading- you click on the blue button to upload to your agency folder. Further instructions are below.

1. Click the link located in the email from the SNSIAP team requesting files. This may have a expiry date, like the email for download, to provide you with a deadline to upload the files.



The screenshot shows an email header from the Scottish Legal Aid Board. The body of the email is addressed to Donald and contains the following text:

Donald,  
Donald Makin has requested that you upload a file using ShareFile.

A note from Donald :  
Please upload your prq to this folder

Below the note is a blue button labeled "Upload". A purple arrow points to this button with the text "Click upload".

Below the button is a link: <https://slab.sharefile.eu/r-8198c96a25684ff1>. A blue arrow points to this link with the text "What you to upload".

At the bottom of the email, there is a paragraph of text: "ShareFile is a tool for sending, receiving, and organizing your business files online. It can be used as a password-protected area for sharing information with clients and partners, and it's an easy way to send files that are too large to e-mail." and a footer: "Powered By Citrix ShareFile 2020".

2. You will be asked to enter your log in details and password.
3. On the screen that appears, drag and drop the files you wish to upload from your computer folder or desktop to the box on the screen.

### If uploading case files....

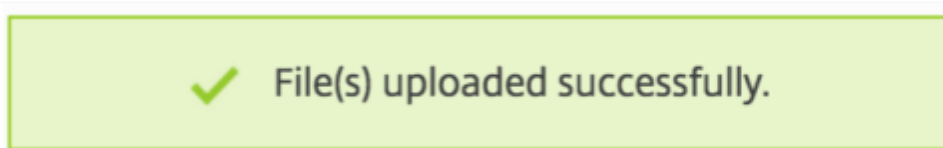
If you are uploading case files you should have put all your individual case files into one folder for each topic and zip this one file (please see the guide on how to zip files). Each case file must be clearly labelled with the case reference and each document in the file clearly labelled with the case number and what the document is. The file for each topic should read for example “agency name money and debt files”.

Please see our top tips for upload for further guidance on what to upload in the case files. If you have any queries on zipping or what to upload, please contact us via email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

**Please do not reply to the sharefile email direct. The snsiap email address should be used.**

4. When you’ve placed all files you wish to upload in the box, click **Upload**.

This message may appear. On your sharefile it may be blue:



If you do not see this message as you can still see files have been uploaded.

You should now see the files have been uploaded:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	⋮
<input type="checkbox"/>	☆  Peer review timetable draft new format ADVICEPRO.pdf	240 KB	4:39 PM	D. Makin	

It can take time to upload depending in the number of files and your broadband speed. Please allow sufficient time if uploading a high volume of case files. Try to begin uploading before the deadline day to allow sufficient time to upload. If you zip files before upload this can make uploading quicker. Please refer to the guidance on zipping files- this is available in your Sharefile folder.

If you encounter any error messages, please contact [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) with a copy of the error message. **Please do not reply to the sharefile email direct. The snsiap email address should be used to report errors.**

Our SNSIAP team or Slab IS dept. will then contact you to help rectify this error. Do not try to fix the error yourself- Slab run the platform and will provide the necessary IT support where they can for sharefile.

## How to upload files using the Sharefile website

1. Go to the sharefile website. The SNSIAP team have provided you with the link. Here is the link if you require it again to access Sharefile <https://slab.sharefile.eu/>

You need to log into the website with the user details you were previously sent.

Remember there is not one generic log in for the agency- it is your login with your own password for Sharefile and each user you added has a different login and password.

Once you are logged in, you need to access the agency folder which has been set up for your peer review.

2. Your agency folder will be located in the **Shared Folders** section. . This can be found on the dashboard- which is the first page you see when you log into sharefile. Shared folders is on the left of the sharefile screen.

This is the same folder you have used to download documents from. You have one agency folder to download from and upload to.

**You must click the folder to open the folder to allow you to upload into this folder. If you do not click into this folder, you will be unable to upload files.**

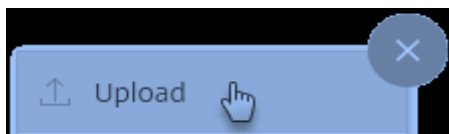
This folder will have the name SNSIAP: followed by your agency name.

3. Click the blue Action Button. This is the plus sign below on the right hand side of the



You must click this first- Sharefile will not allow you to drag files over and drop into the screen if you do not click this first.

4. Click on Upload.



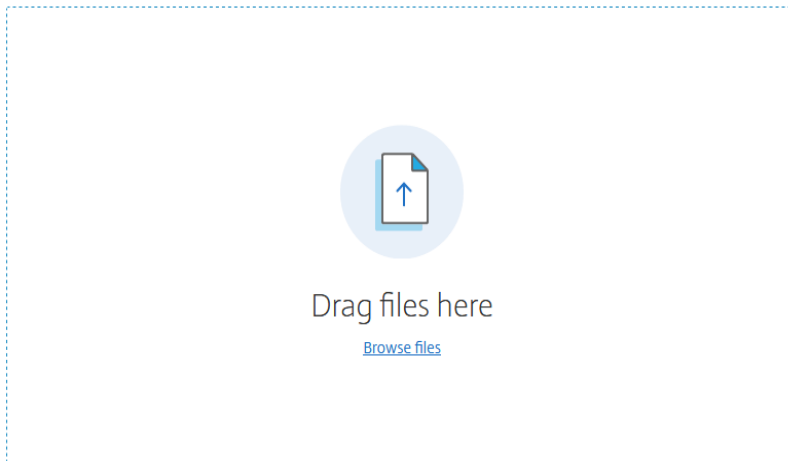
### If uploading case files...

If you are uploading case files you should have put all your individual case files/folder into one large sub folder for each topic and zipped this one folder (please see the guide on how to zip files). Each case file must be clearly labelled with the case reference and each document clearly labelled. The file for each topic should read for example “agency name money and debt files”.

Please see our [guide top tips for upload](#) for further guidance on what to upload in the case files. If you have any queries on zipping or what to upload, please contact us via email [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk)

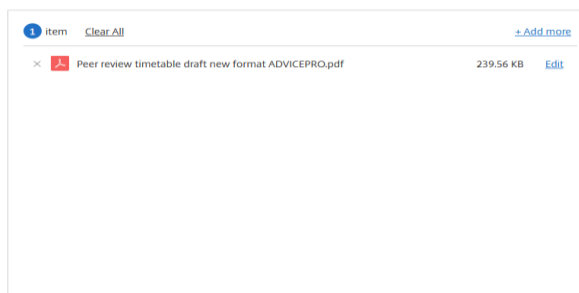
Please do not reply to the sharefile email direct with any queries. The [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) email address should be used.

5. Drag these files from your computer into the Drag Files Here area, or click Browse files to select them manually. This will allow you to find the files you need to upload.

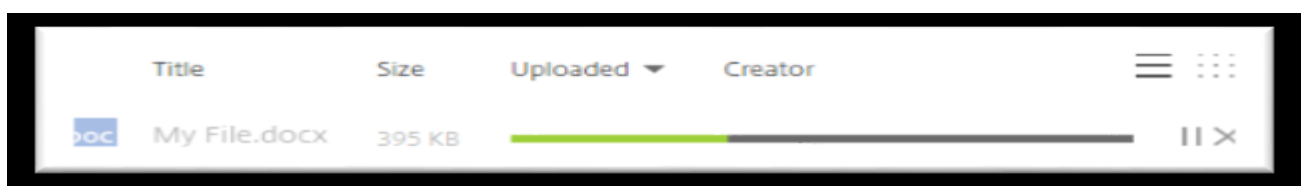


The drag files area is the area in the folder and you can put any files into this area to upload.

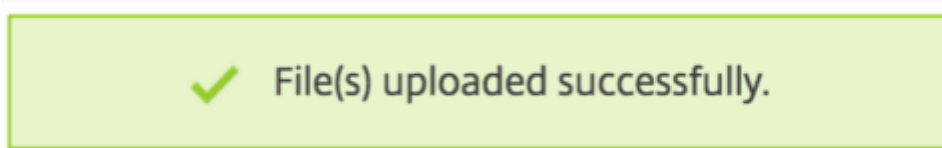
6. Click Upload when ready. Your files will be uploaded.



The screen which appears will be similar to the screen below- the bar may be blue:



You may see this message:



If you do not see this message as you can still see files have been uploaded. Once uploaded, you will see the files have been uploaded:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	⋮
<input type="checkbox"/>	☆  Peer review timetable draft new format ADVICEPRO.pdf	240 KB	4:39 PM	D. Makin	

If you are uploading a number of files, this can take some time depending on your broadband speed.

If you upload a file in error, please contact us to delete the file. We can delete the files from sharefile, as you are unable to delete files once these have been uploaded.

If you encounter any technical difficulties, please contact [snsiap@slab.org.uk](mailto:snsiap@slab.org.uk) with a copy of any error messages. **Please do not reply to the sharefile email direct. The snsiap email address should be used to report any errors.**

Our Slab IS dept. or our SNSIAP team will then contact you to help you. . Do not try to fix any difficulties - Slab run the platform and will provide the necessary IT support where they can for sharefile difficulties or errors.