more2life

Suitability Report Repository

User Guide

Introduction

The SR Repository has been set up to provide a secure storage site for Flexi Choice Suitability Reports.

We've set it up to be a user friendly and intuitive way to upload suitability reports, however please read the following guide to ensure you're aware of all the functions that the system offers.

Logging In

You can access the repository by visiting the following link (note that you should use Google Chrome for access):

https://www.srrepository.com/

When you first open the repository you will be presented with the login screen.
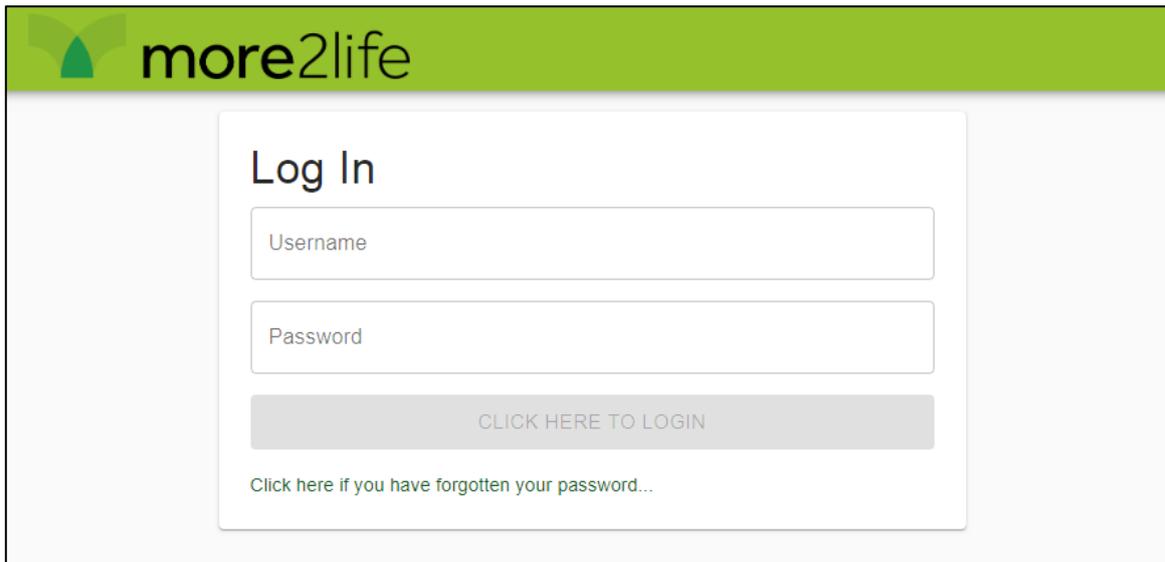
Please use the username and password provided with your welcome email. Ensure that you enter both the username and password exactly as they appear in the email as they are both case sensitive.

Please note that you will not be able to manually change your password - it can only be changed if reset by yourself or an admin, at which point the system will generate a new secure password for you.
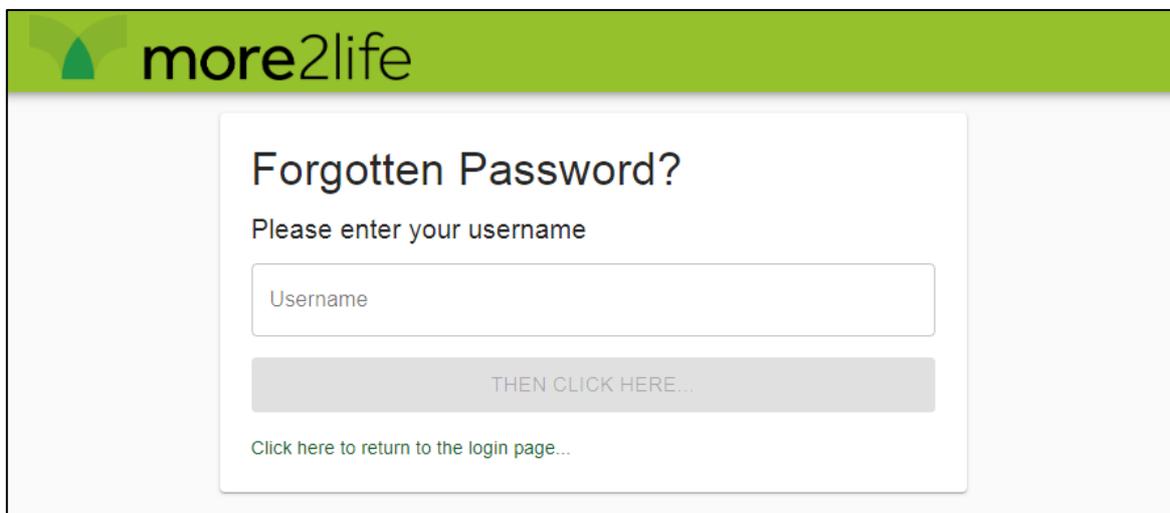
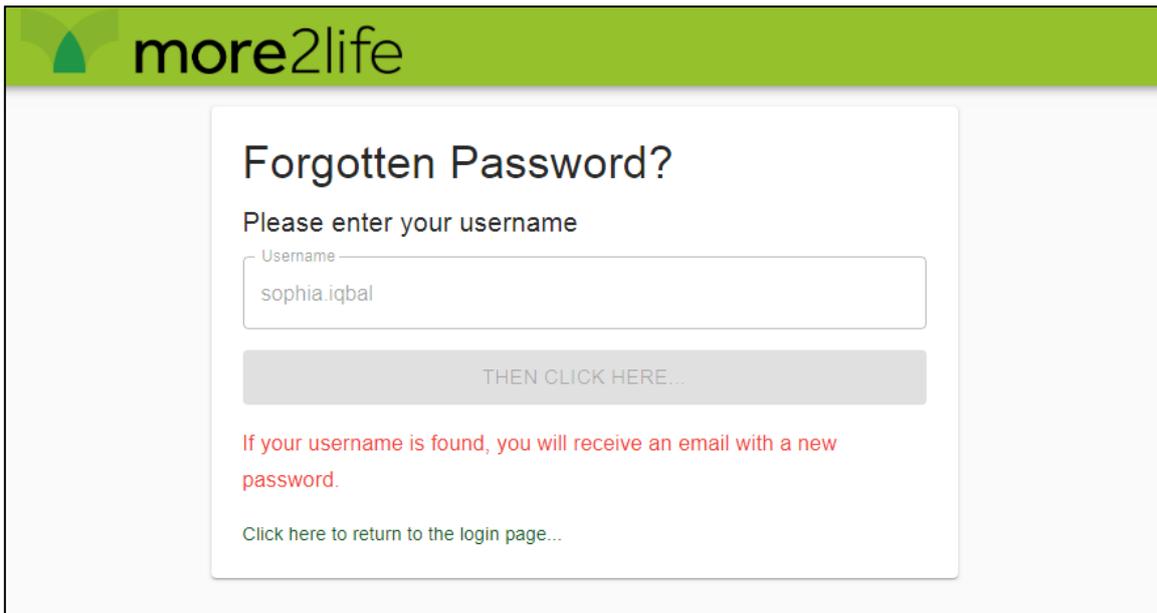Once you have entered your username and password, the login button with be highlighted – click to log in.
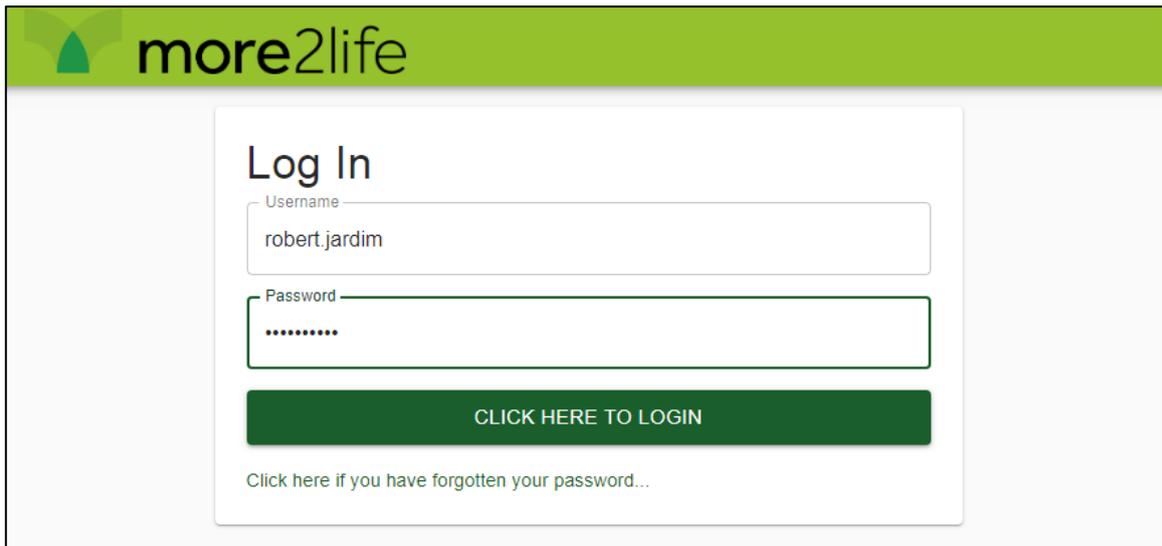
Forgot Password

If you have forgotten your password please click on the "forgotten your password" link at the bottom of the login box.

Enter your username and an email will be sent to your registered email address with new login details.
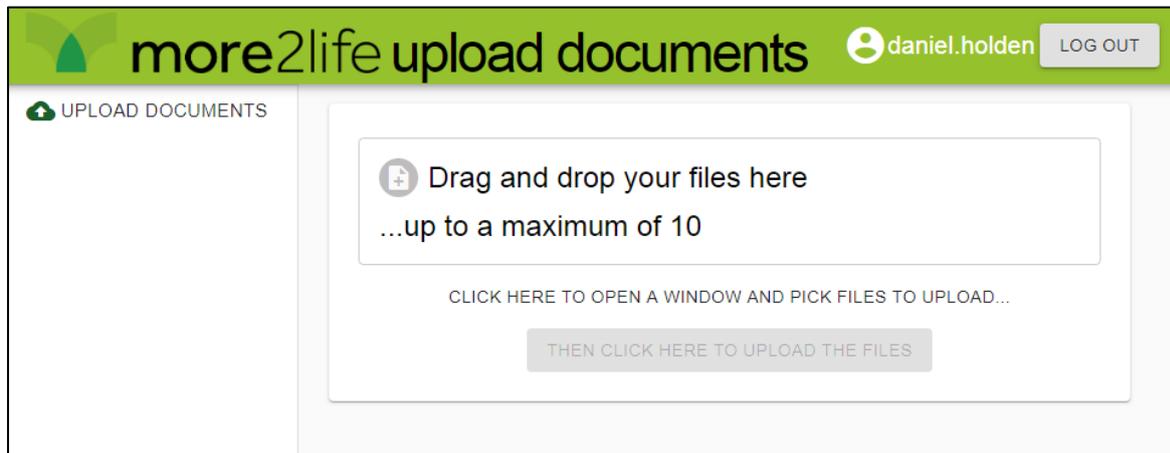
Logging Out

To log out, simply click on the "Log Out" button at the top right of the screen:
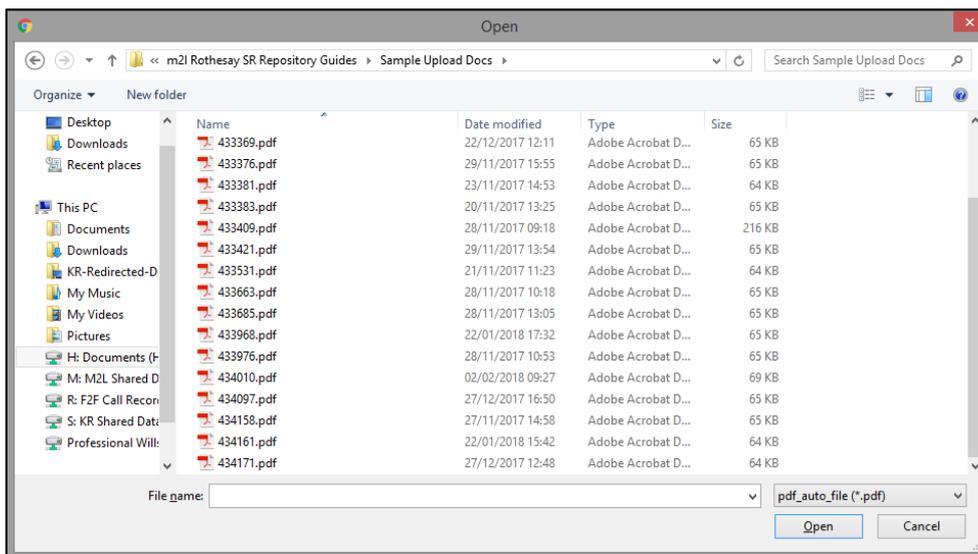
Uploading Documents

Click on to "Upload Documents" on the left side bar to start the document upload process.

You'll be able to upload a maximum of 10 files at once using this system.

Please note that the system will only accept documents in PDF format. You will receive an error message if you try to upload files in a different format.

Either drag and drop the files from your desktop/saved folder or click on the "**click here to open a window and pick files to upload**" option which will open a window to allow you to select the required files.

Whether you drag & drop or manually select the files, you'll next be given the option to name each file selected before uploading.

Please note you can only upload one document per Case ID so ensure that you are uploading the correct file, as once uploaded it can't be deleted or overwritten. **File names must be the More2life case ID only, as per the examples below.**
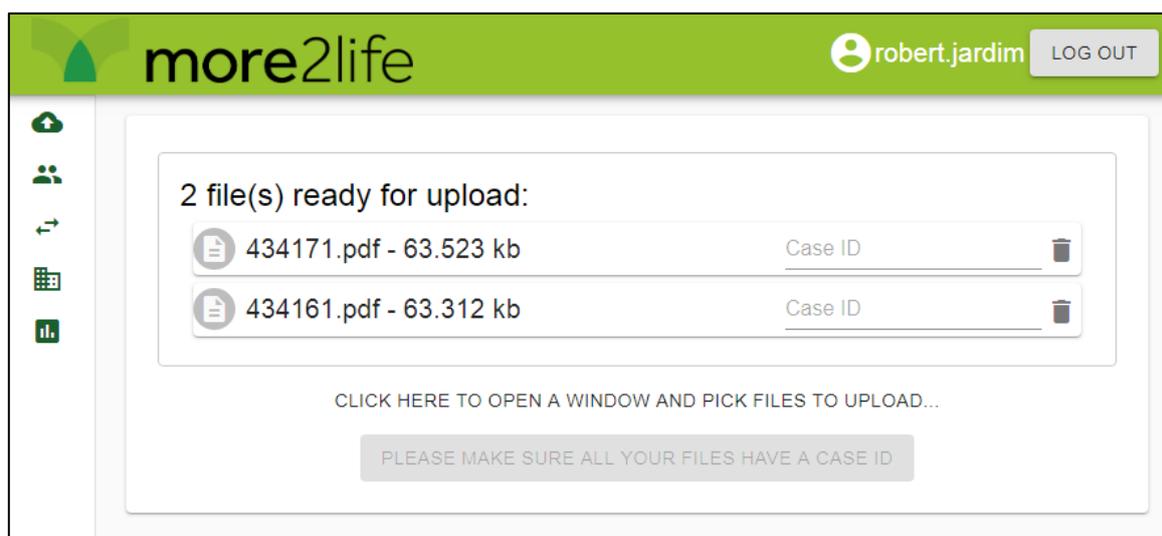

Enter the more2life Case ID for each file, or click on the bin icon to remove a document from the upload list. Once all the documents in the upload list have been

named, the grey button will be highlighted green; click on it to start the upload process.

Please note that once you click "Upload", the document will not be able to be removed from the repository so it's essential that you are sure that the correct document is being uploaded.
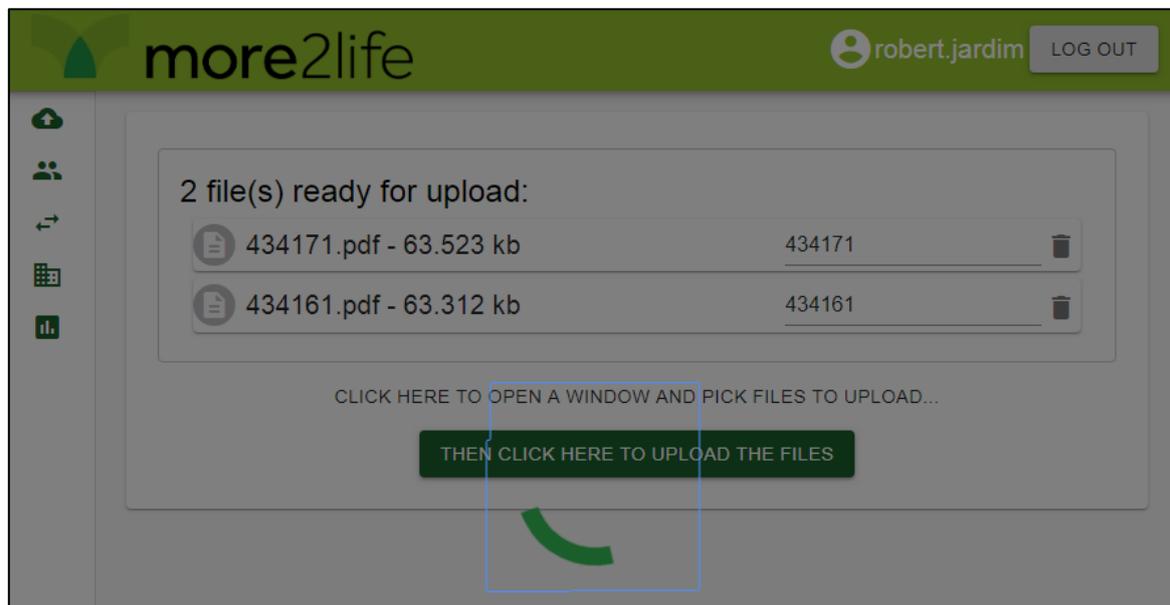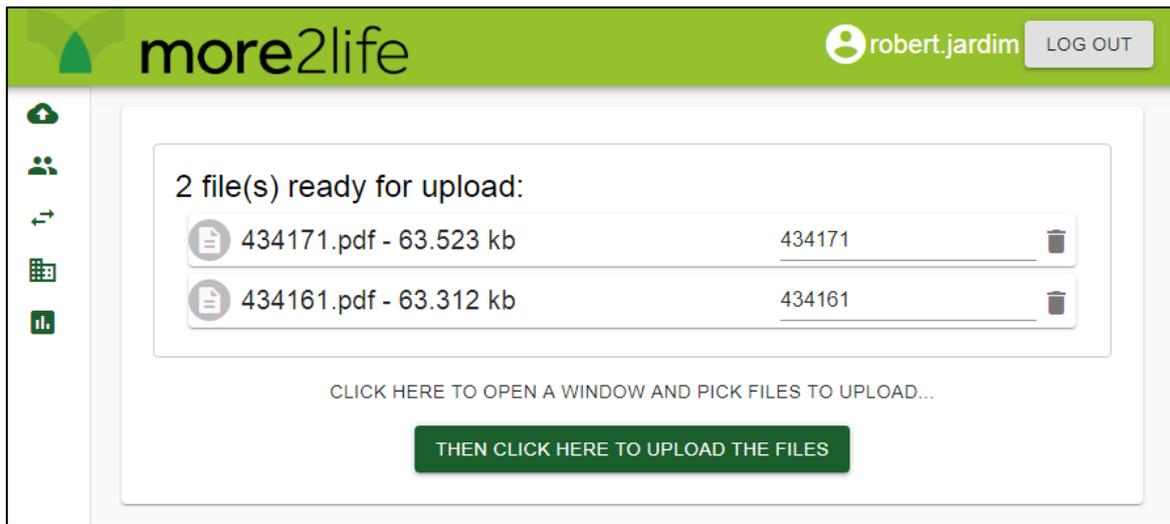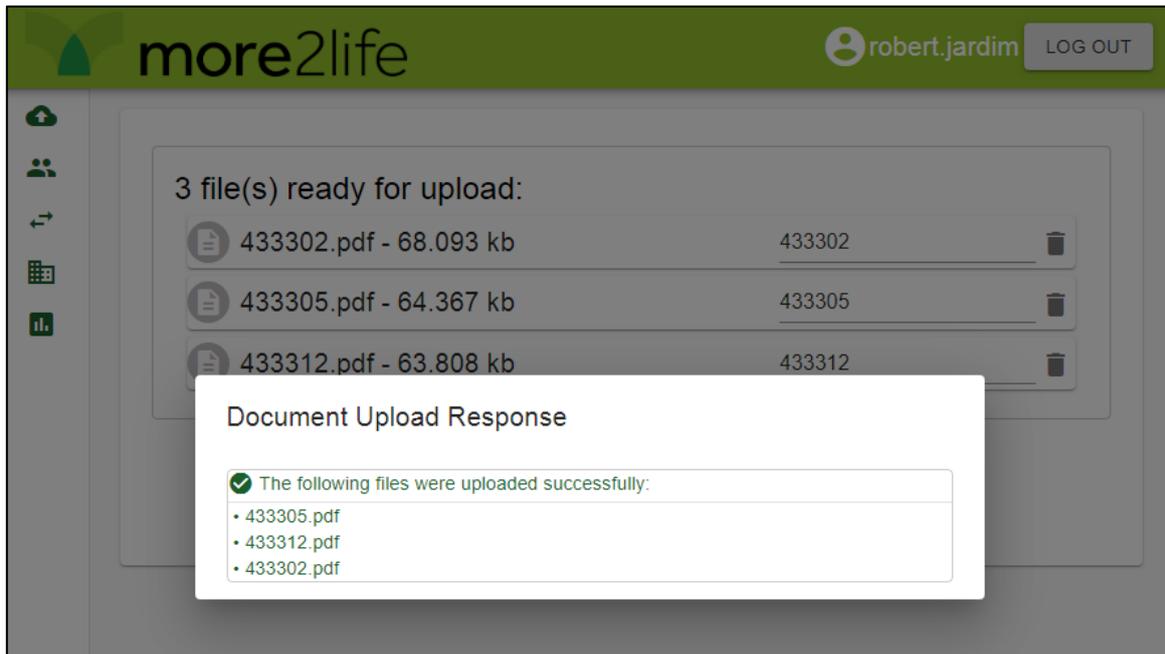
The above screen will show if the upload was completed successfully. Click anywhere outside of the white box to remove it.

The system will now be ready for the next upload.

Please note you may receive notification of the case's completion and subsequent closure, this is unrelated to the SR requirement and you will still need to upload the report to the portal.

Upload Errors

Incorrect File Format

As previously mentioned, the system will only allow you to upload documents to PDF format. If you try to upload a different file format, you will receive the below message:
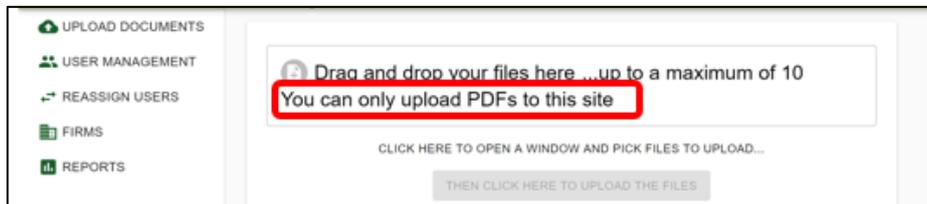

Duplicate files

The system will only allow one document to be uploaded for each reference number so it's vital to ensure that you upload the correct document at the first attempt.

If you attempt to save another document under an existing document's reference, you will receive the below message:
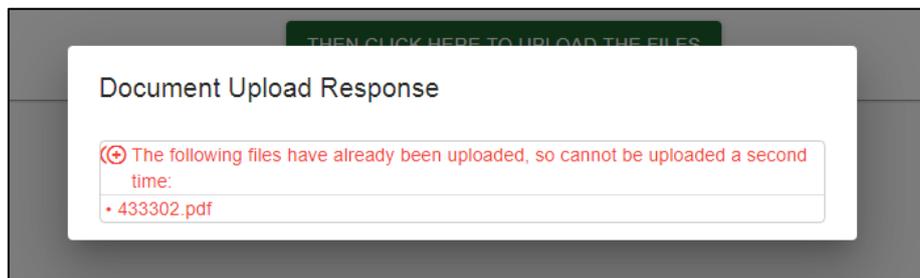
Session Time-out

You might also receive the below error when trying to upload a document. This is usually because you've been inactive for too long and the system has logged you out. If this is the case, the error will be followed up by the **Session Expired** notification.
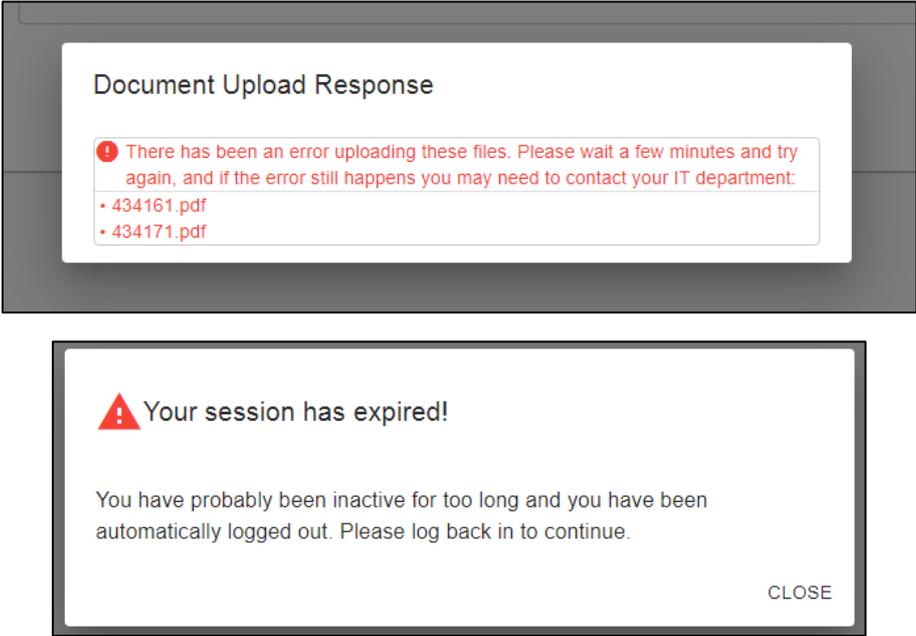
You'll need to log back in to your account, and once done you should be able to upload as normal.