

Blick Rothenberg Cozone Drive Guidance – Corporate Client User

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Logging into Drive

- **Existing Cozone Users:** Log into Drive using your existing credentials for Cozone using the link [here](#). Please do not use the existing link as the URL has been updated.
- **New Cozone User:** Log into Drive using the credentials sent in the welcome email. You will be sent a welcome email after Blick Rothenberg client team has sent a request for client setup. **See below for further instructions on setting up your account.**

Set up your Cozone Drive User account

Part 1 – Setting up your log in credentials

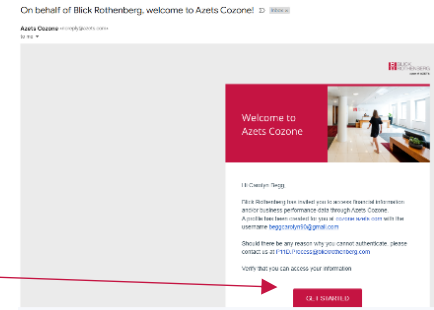
1. You will receive an email from Cozone (noreply@azets.com) to the email address we currently store for you. *Make sure noreply@azets.com has been added to your trusted address to avoid content being blocked or going into a spam/junk folder.*
2. In the email click on the link [GET STARTED](#) to set up your password. NB: link will expire after two weeks.

The web browser will open Cozone page to set up your account. Either create a password & two factor authentication:

3. Enter a password that meets the following Cozone enforced requirements:
 - Must be a minimum of 10 characters
 - Combination of numbers, lower/uppercase
 - Ideally a combination of memorable words for example: “Leilaturns5thisAutumn”
4. When password meets the criteria and button ‘Save Password’ becomes red, click it.

Instead of setting up a password you can set up a Passkey or sign in via Google, see below:

- Passkeys are a simplified generic way of logging into Cozone. After having set up a Passkey, you will be able to login to Cozone by
 - Using your computer's PIN (if you set it up via Windows Hello);
 - By accepting a push notification (if you set it up on their phone) or
 - By accepting the login in your password manager (if setup via a password manager).
- Sign-in with Google if you have a Google-account to sign into Cozone with a single click, so long as your Google username and Cozone username match.



Set up your account

Select one of these login methods to start the setup. You can change login method later in Account settings.

- Create password and two-factor authentication**
Protect your account with 2-Factor Authentication (2FA). 2FA requires your password and a verification code every time you sign in.
- Create a passkey**
Passkeys are an easier and more secure alternative to passwords. Passkeys are encrypted digital keys you create using your fingerprint, face, or screen lock.

Welcome to Azets Cozone

or

 Email or username

 Password

 Remember me [Forgot your password?](#)

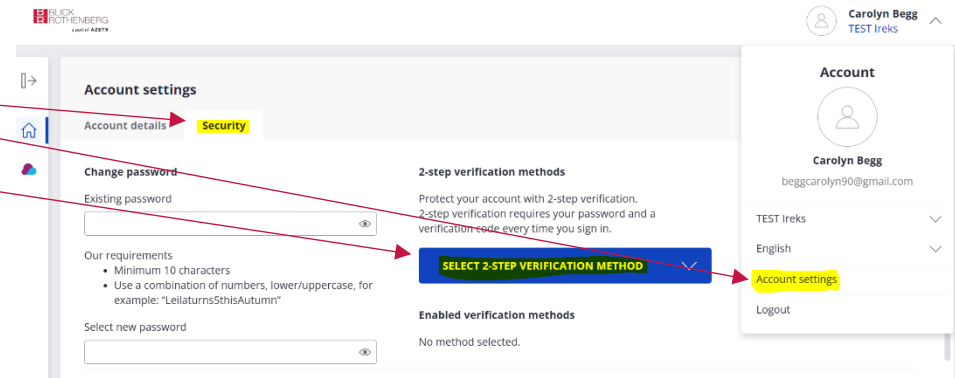
Part 2. Set up 2-factor authentication on your mobile device for added security (ONLY FOR PASSWORD LOGIN – NOT REQUIRED FOR PASKEYS OR GOOGLE)

After setting password, you'll be required to set up 2-factor authentication on your mobile device. The code from two factor authenticator app will be required each time you log in to Cozone.

Once you have logged into Cozone, navigate to Accounts settings>Security and select the 2-Step Verification method.

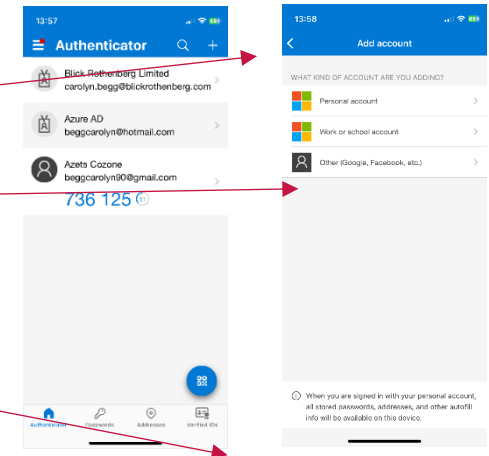
We recommend using **Microsoft Authenticator** (setup steps showed below) however there are other options to choose from.

- Google authenticator
- SMS notifications - depending on external factors such as network carrier, phone signal etc the text message may not arrive and your experience connecting may not meet the expectations.
- Other authentication app. Client's choice of any MFA that supports TOTP.



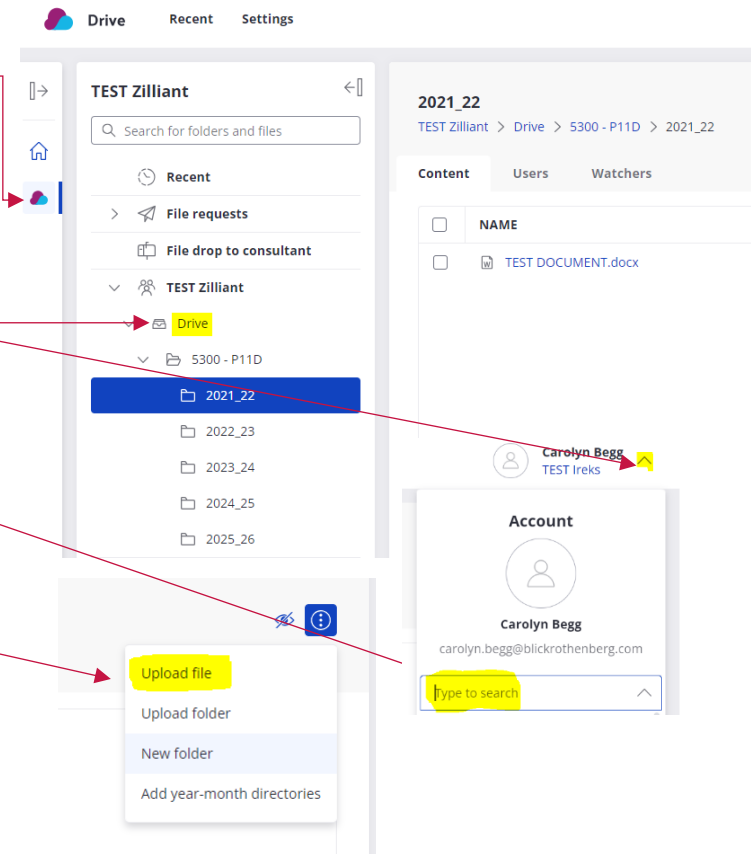
Microsoft Authentication set up

1. **On your mobile device** download “Microsoft authenticator app” from IOS App Store / Google Play Store.
2. Open the app you just installed:
 - If it is your first account:
 - Select on Add Account by clicking on ‘+’ at the top of the screen
 - Select Other account (Google, Facebook, etc.) from the options
 - If you already have App installed
 - Click on the QR code icon
3. A QR reader will appear on your phone. Scan the QR code from Cozone website, a 6-digit code will appear on your Microsoft Authenticator app.
4. On Cozone website click Continue. Type 6-digit code from Microsoft Authenticator app and click Verify.
5. Copy the backup code and save it in safe place. This is used to login if your phone app cannot be accessed. Once logged in with the backup code, you will be able to reset your 2FA. Click Done.



File Sharing from Drive to Blick Rothenberg

1. Once you are logged in, Click on Drive
2. Click on Drive folder under the client name (Left-hand menu).
It will default to the individual client name or if it is a corporate client it will be the main company, if you need to select a different company follow instructions below:
 - a. Navigate to top right-hand corner under Account
 - b. Click on down button next to your name
 - c. Search for client name or client code
3. Select Folder and Subfolder (if applicable) to upload file to
4. Either drag and drop file you wish to upload into folder or
 - i. Click on the More Actions menu (3 dots)
 - ii. Click on Upload File
 - iii. Select file you wish to upload
5. Email notification is sent to Blick Rothenberg Assignment Team to inform them the file(s) have been uploaded.



File Request

1. You may receive a file request from the Blick Rothenberg Assignment Team
It will include the details of files requested and the location for you to upload them to including a date to provide the files by.
2. Email notification will include a link which will take you to the folder in Drive for the documents to be uploaded to.
3. You will need to upload the file(s) into the relevant section(s) by either drag & drop or browse file on your PC.
4. Once you have uploaded the required file(s) you will need to click on the 'Complete section' button. You will need to repeat for each section and close request when all sections have been completed.
5. Email notification is sent to BR Assignment team to inform them the section has been completed and if all sections have been completed that the file request has been closed.

TEST Zilliant > File requests > FILEREQUESTTEST

Provide these files **before 2024-11-30**.

Custom message: Please upload xyz files to this folder

Tax

Drag and drop or [browse files](#)

TEST DOCUMENT.docx

18 Nov 2024 08:05



Hi Carolyn Begg Client,

Carolyn Begg requested for you to upload files in FILEREQUESTTEST.

Please provide these files **before 30 Nov 2024**.

Custom message: Please upload xyz files to this folder

Files to upload

Year end

Tax

View File Request

FILEREQUESTTEST

TEST Zilliant > File requests > FILEREQUESTTEST

Provide these files **before 2024-11-30**.

Custom message: Please upload xyz files to this folder

Tax

Incomplete



Drag and drop or [browse files](#)

Year end

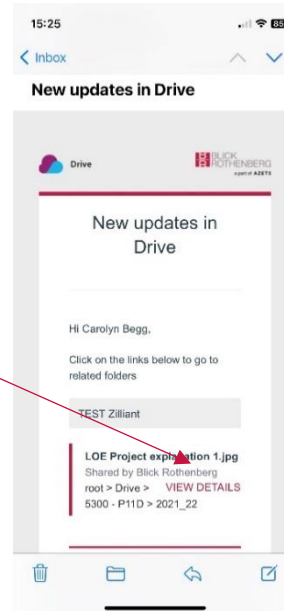
Incomplete



Drag and drop or [browse files](#)

File Sharing from Blick Rothenberg to Drive

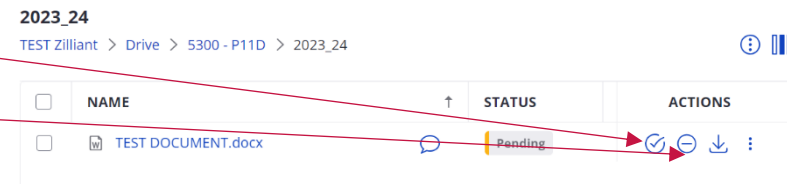
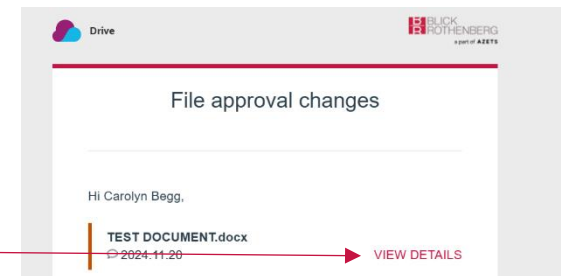
1. When a document is uploaded to Drive from the BR Assignment Team you will receive an email notification.
2. Click on View Details.
3. You will need to log into Cozone using the credentials you set up when you received in the welcome email to access the File(s).
4. If you are viewing the document on a mobile device you may wish to download it to first to improve the readability.



Approvals

You may be required to approve a document **by the BR assignment team**, see details below. **You do not need to send an approval request to the BR assignment team.**

1. Email notification will be sent titled 'New updates in Drive' along with a subsequent email titled 'File Approval changes' with a link to the document(s) to approve.
2. Click on 'View Details' and log into Drive.
3. Next to the document you will see 2 buttons, click on either Approve or Reject. If rejecting you will need to leave a comment.
4. An email notification will be sent to the BR Assignment Team.



FAQS

I have not received the welcome email, what should I do?

Check it has not gone into your junk emails, if it hasn't then contact your BR representative and they will request for it to be resent.

I need to update my email address, what should I do?

Contact your BR representative and they will request for it to be updated by the Azets Cozone support team.

Am I able to create a new folder in Drive?

No, you will not be able to create a new folder, but you can ask your BR representative to create any folder(s) required.

Do I need to password protect a document before I share it using Drive?

No, Drive is a secure client sharing platform which does not require documents to be password protected.

Does Drive support zip files?

Yes, you can upload zip files into Drive.

I have been using ShareFile what will happen to my files that are stored on ShareFile when I move to Drive?

The project team are working on the transition from ShareFile project, we will update you as soon as possible.