

# User Scenario: Secure Save

1. Bob is in the process of filling out the 60 page long AML Policy. He has to leave the office but doesn't want to lose his progress.

2. He wants to save it locally, so he clicks the button "Computer" and saves as a "Draft."

3. He saves it as "BDdraft\_AMLPolicy\_ClientA" in his "Downloads" folder.

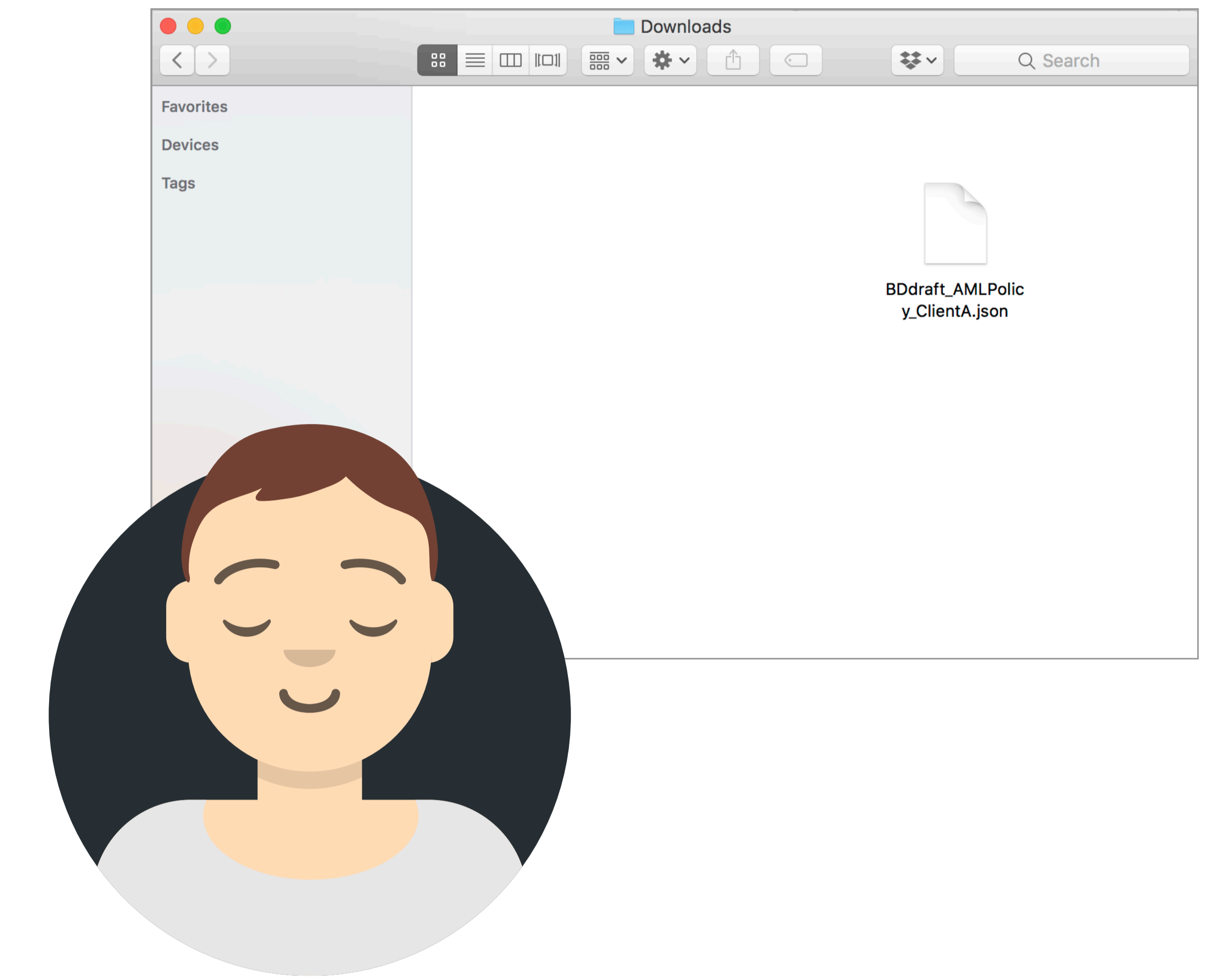
Some browsers like Chrome will automatically save to your default download folder.

4. He goes to sleep in peace, knowing his progress is available for another day and his client data safe from hackers.

The screenshot shows the 'Crypto AML Policies' form in the 'Computer' draft mode. The form is partially filled with 'Client A' and 'John Doe'. A sad Bob icon is overlaid on the left side of the form.

The screenshot shows the 'Crypto AML Policies' form with a dropdown menu open over the 'SAVE TO:' buttons. The 'Draft' option is highlighted, indicating the user's intention to save the draft locally.

The screenshot shows a file save dialog box. The file name is 'BDdraft\_AMLPolicy\_ClientA' and the 'Downloads' folder is selected as the destination. The 'Save' button is highlighted.



## ...A WEEK LATER

5. It's time for Bob to work on the AML Policy again. He opens the brand new template page and clicks "Computer" to open draft.

6. He goes to "Downloads" and opens "BDdraft\_AMLPolicy\_ClientA."

7. This populates the template with his progress from before. Bob can continue working on the AML Policy, save progress for another day, or export the final version to DOCX or PDF.

+ He can even go to a different template and open the same file, "BDdraft\_AMLPolicy\_ClientA" to populate it with available form responses.

I.E. reoccurring fields like Company Name, Date

The screenshot shows the 'Crypto AML Policies' form with the 'Computer' draft mode selected. The form is mostly empty, ready to be populated with data from the saved draft.

The screenshot shows a file open dialog box. The file 'BDdraft\_AMLPolicy\_ClientA.json' is selected in the 'Downloads' folder. The 'Open' button is highlighted.

The screenshot shows the 'Crypto AML Policies' form with data populated from the draft, including 'Client A' and 'John Doe'. A happy Bob icon is overlaid on the left side of the form.

The screenshot shows a different template form, 'Any Other Template', with data populated from the draft, including 'Client A' and '1/1/2019'. A 'FILL FORM' button is visible at the bottom.