

Workshare Admin Console

Admin Guide

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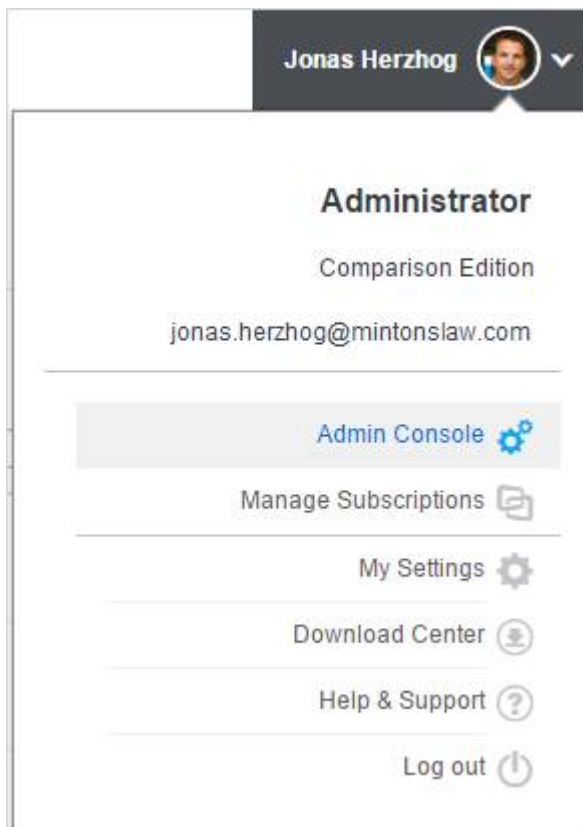
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Introducing the Workshare Admin Console

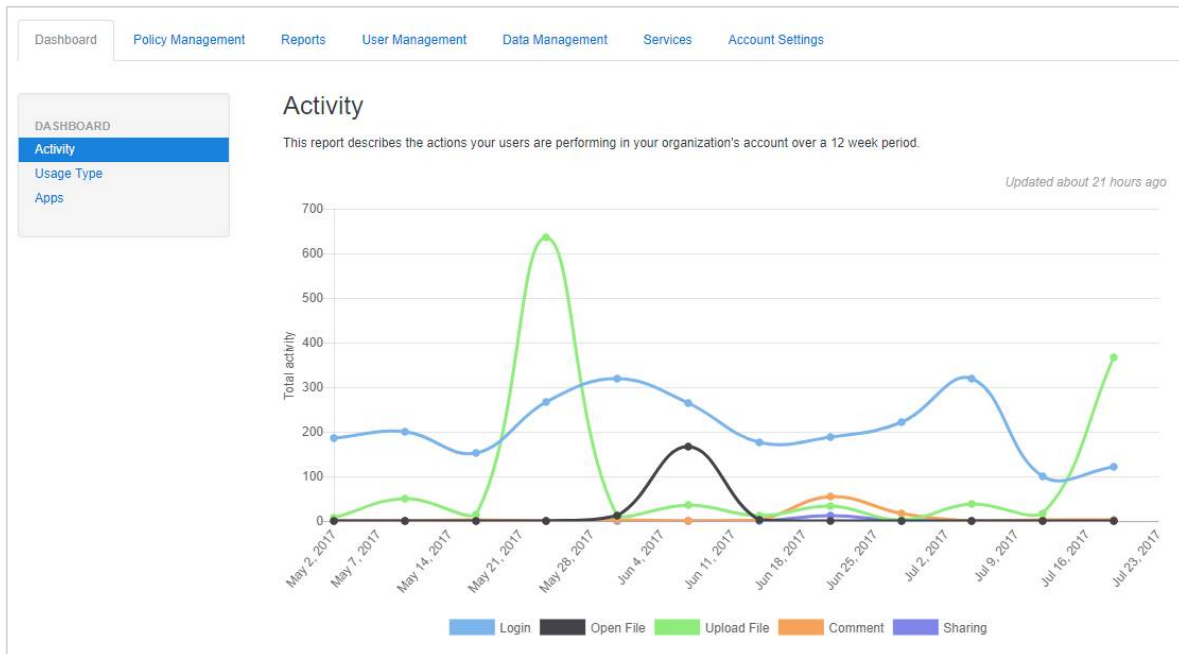
The Workshare Admin Console enables IT to have full control over access rights to files and documents, enforcing corporate policies and rights to groups and individuals. The Admin Console provides:

- Full visibility and control of employees and their devices
- Comprehensive reporting, including activity logs and detailed reports with automatic reporting to highlight individual user behavior
- A full audit trail of all user activity – what content has been shared, with whom, and from what device
- Data management and storage location control enabling the choice of geographical location from selected, highly secure European, US, or Asian data centers
- The ability to automatically build a solid audit trail ensuring business-compliance with any legal or regulatory requirements

Only administrator users (with an Account Admin role on Workshare) can access the Admin Console by clicking their user name in the topbar.



Select **Admin Console**. By default, the Activity graph on the **Dashboard** tab is displayed.



The following tabs can be available on the Admin Console:

- Dashboard
- Policy Management
- Reports
- User Management
- Data Management
- Services
- Account Settings

Note: The tabs available depend on the type of Workshare account you have.

The top banner is constant and provides an overall account view.



The information provided in the top banner is as follows:

Logo	Your logo (set in the Account Settings tab).
Company name	The company name on the account (set in the Account Settings tab).
Date created	When your account was set up.
Subscription	The type of subscription you have – Comparison Edition, Sharing Edition or Integration Edition.
Licenses	The number of licenses purchased for the account – this determines the number of users you can add to your account.
Users Invited	The number of users you have invited to the account.
Licenses Used	The number of users who have accepted your invitation, validated their account and become licensed users on your corporate account.
Guest Users	The number of guests invited by any licensed users on your account.
Storage Used	The amount of storage used on your account.

Managing Data

The Admin Console enables you to manage and control all data stored in Workshare. You can specify where your data is securely stored and you can see exactly what devices are being used to access Workshare at any one time.

Note: The functionality of the **Data Management** tab is available for Sharing Edition and Integration Edition accounts only.

Setting Storage Location

Workshare is hosted by a range of carefully selected and fully accredited data center partners across Europe, North America and Asia Pacific, allowing you to locate your data in a region of your choice.

Workshare data center partners are ASHRAY, ISO 27001 Information Security Management System (ISMS), and/or SAS70 Type II audited/certified. North American partners are also Federal Information Processing Standard (FIPS) and healthcare-applications compliant with HIPAA's Security and Privacy Rules. Workshare's partners' data center buildings are physically secure and provide a controlled environment for optimum performance.

Note: For further information about the security of the Workshare storage locations, refer to the Workshare Security Data Sheet available on the Workshare website.

The default Workshare storage location is in Dublin, Ireland - **EU (Ireland)**. If you have a Sharing or Integration Edition account, you can change this location to another secure Workshare-approved geographical location or, if you have an Integration Edition account, you can specify your own private or on-premise data storage location.

Note: If you have an Integration Edition account, you can select different storage locations for individual users from the **User Management** tab.

To change your default data storage location:

1. Select the **Data Management** tab.

2. Ensure **Storage** is selected in the left menu.

Storage

When you add users to your account, their files are stored in the **default storage location**. Select your the default location from the geographical locations provided by Workshare or set up your own custom (on premise) locations.

Note: You can assign different storage locations to individual users from the User Management tab.

Workshare storage locations

<div>EU (Ireland)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>1230 users</div><div>35 MB</div></div> <div>Default</div>	<div>US Standard</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>250 users</div><div>2 MB</div></div> <div>Set as default</div>	<div>US West (Oregon)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>0 users</div><div>0 MB</div></div> <div>Set as default</div>
<div>US West (Norten California)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>0 users</div><div>0 MB</div></div> <div>Set as default</div>	<div>Asia Pacific (Singapore)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>0 users</div><div>0 MB</div></div> <div>Set as default</div>	<div>Asia Pacific (Tokyo)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>0 users</div><div>0 MB</div></div> <div>Set as default</div>
<div>Asia Pacific (Sydney)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>0 users</div><div>0 MB</div></div> <div>Set as default</div>	<div>South America (Sao Paulo)</div> <div><div>Assigned to</div><div>Storage usage</div></div> <div><div>0 users</div><div>0 MB</div></div> <div>Set as default</div>	

Custom storage locations

Mintons Germany Repository

https://germany-repository.mintons.com/246...

Test

Assigned to

Storage usage

35 users

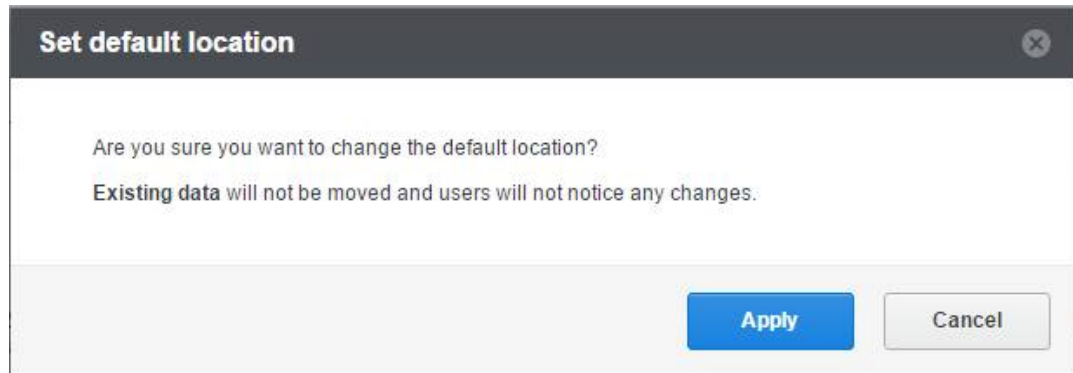
1 MB

Set as default

[+ Add custom location](#)

The default location is indicated by the blue “Default” button. For each Workshare location, the number of users currently assigned to that location is shown as well as the amount of storage space used.

3. Select **Set as default** for the location you would like to use as the default. This means any new users on your account will be assigned to this storage location by default. If you have an Integration Edition account, you can select different storage locations for individual users from the **User Management** tab. The storage location of any existing users will remain as the previous default location.



4. Click **Apply** to confirm the change.

Data that has already been stored will remain in the previous location. Existing data is not migrated across to the new location.

Note: If you have an Integration Edition account, you can configure your own custom storage location. Please contact Workshare Customer Support for further information about setting up Workshare hybrid storage.

Managing Devices

At any time, you can see all the devices currently linked to your Workshare account for all users of the account. Where necessary, for example when a device is stolen, you can unlink a device giving you full control over access to your Workshare data. Unlinking a device logs the user out of Workshare on that device. When unlinking a device running the Workshare desktop app, you can also ensure that all Workshare files are deleted from the Workshare folder on that device.

To view all devices:

Select the **Data Management** tab and select **All Devices** in the left menu.

All Devices

Linked Devices

These devices are currently linked to your Workshare account.

Last Activity	Country	First Name	Last Name	Email	Device Name	Registered Date	
28 minutes ago	United Kingdom	Vera	Wheeler	vera.wheeler@workshare.com	Android	bout an hour ago	Unlink
about a minute ago	United Kingdom	Chris	Wheeler	chris.wheeler@workshare.com	Android	bout 5 hours ago	Unlink
less than a minute ago	United Kingdom	Christine	Wheeler	christine.wheeler@workshare.com	Android	bout 5 hours ago	Unlink
3 minutes ago	United Kingdom	Heien	Wheeler	heien.wheeler@workshare.com	Android	bout 5 hours ago	Unlink
less than a minute ago	United Kingdom	Mei	Wheeler	mei.wheeler@workshare.com	Android	bout 5 hours ago	Unlink
about an hour ago	United States	George	Wheeler	george.wheeler@workshare.com	Desktop	bout 9 hours ago	Unlink
less than a minute ago	United Kingdom	Sara	Wheeler	sara.wheeler@workshare.com	Android	bout 22 hours ago	Unlink
2 minutes ago	United States	Peter	Wheeler	peter.wheeler@workshare.com	Desktop	bout 22 hours ago	Unlink

All devices currently accessing your Workshare account are listed including mobile phones, iPads and laptops. For each device listed, you can see the following information:

Last Activity	When this device last interacted with Workshare.
Country	Where the device is located.
First Name	The first name of the user accessing Workshare.
Last Name	The last name of the user accessing Workshare.
Email	The email address of the user accessing Workshare.
Device Name	The name of the device.
Registered Date	The date the user registered as a Workshare user.

To unlink a device:

1. Click **Unlink** to the far right of a device.

Unlink Device

You are about to unlink Desktop App from Elizabeth Morris's account

This device will no longer be synchronized and the user will be logged out. If you have security concerns about this device, changing the user's password is recommended.

☒ Elizabeth Morris should be able to keep files already synchronized to this device.

Cancel

Unlink Device

2. Select the checkbox if you want to leave the Workshare data already synchronized to the selected device on the device. Leave the checkbox unselected if you want the Workshare folder containing the synchronized data to be removed from the selected device.
3. Click **Unlink Device** to confirm. Workshare will close on the selected device and the user will need to log in again. Once the device is unlinked, it will no longer appear in the **All Devices** list.

Managing Web Sessions

At any time, you can see all the browsers currently logged into your Workshare account for all users of the account. Where necessary, you can end a browser's session giving you full control over access to your Workshare data. Ending a browser session effectively logs the user out of the Workshare web app.

After being logged out, the user can log back in immediately using their Workshare login credentials.

To view live web sessions:

Select the **Data Management** tab and select **All Web Sessions** in the left menu.

All Web Sessions						
Web Sessions						
These are the web browsers currently logged into your Workshare account.						
Last Activity	Country	First Name	Last Name	Email	Browser Name	
less than a minute ago	United Kingdom	Efe	...	efe.using@workshare.com	Chrome	end session
less than a minute ago	United Kingdom	Helen	...	helen.using@workshare.com	Chrome	current session
less than a minute ago	United Kingdom	Jen	...	jen.managing@workshare.com	Chrome	end session
about a minute ago	United Kingdom	Clarence	...	clarence.clarence@workshare.com	Safari	end session
about a minute ago	United States	Anthony	...	anthony.managing@workshare.com	Chrome	end session
about a minute ago	United Kingdom	Matthew	...	matthew.managing@workshare.com	Chrome	end session

All browsers currently accessing your Workshare account are listed with the following information:

Last Activity	When this browser last interacted with Workshare.
Country	Where the browser is located.
First Name	The first name of the user accessing Workshare.
Last Name	The last name of the user accessing Workshare.
Email	The email address of the user accessing Workshare.
Browser Name	The type of browser.

To end a browser session:

In the **Web Sessions** list, click **end session** to the far right of the browser session you want to end. The user is logged out of Workshare and their browser displays the Workshare login window.

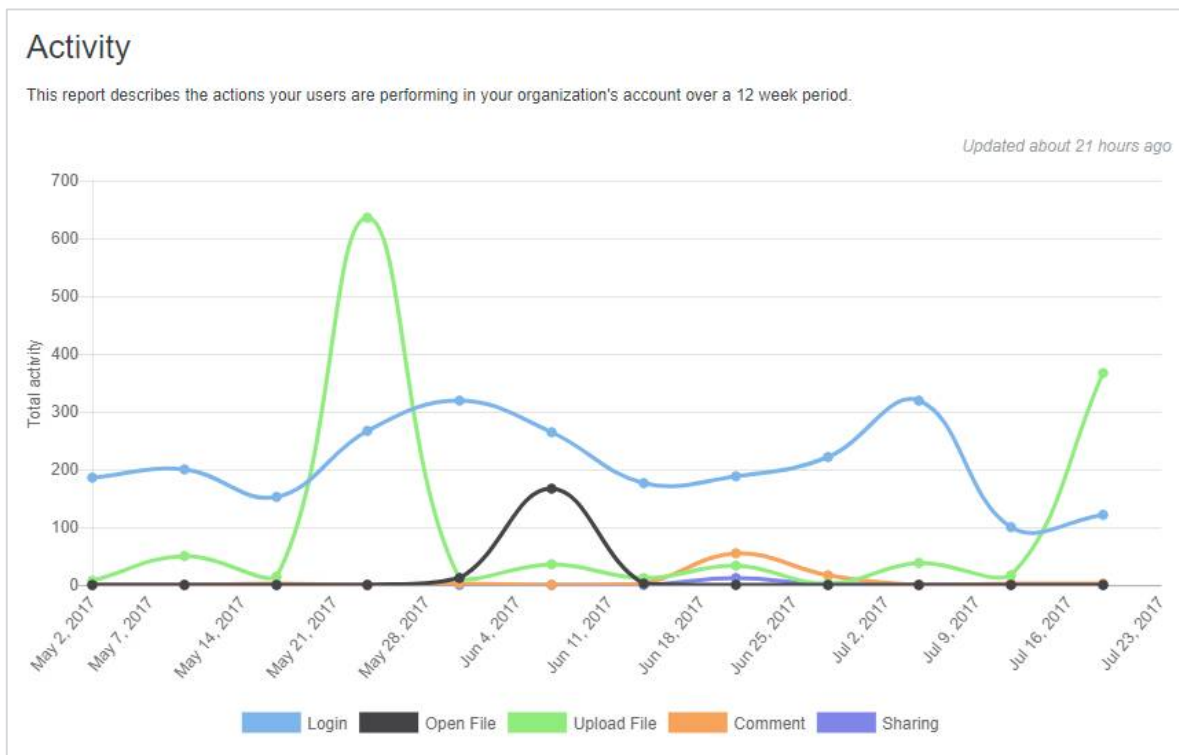
Analyzing Usage

The graphs available on the Dashboard provide you with an insight as to how your users are using Workshare and what kind of activities are being performed.

There are several reports available on the **Dashboard** tab as follows:

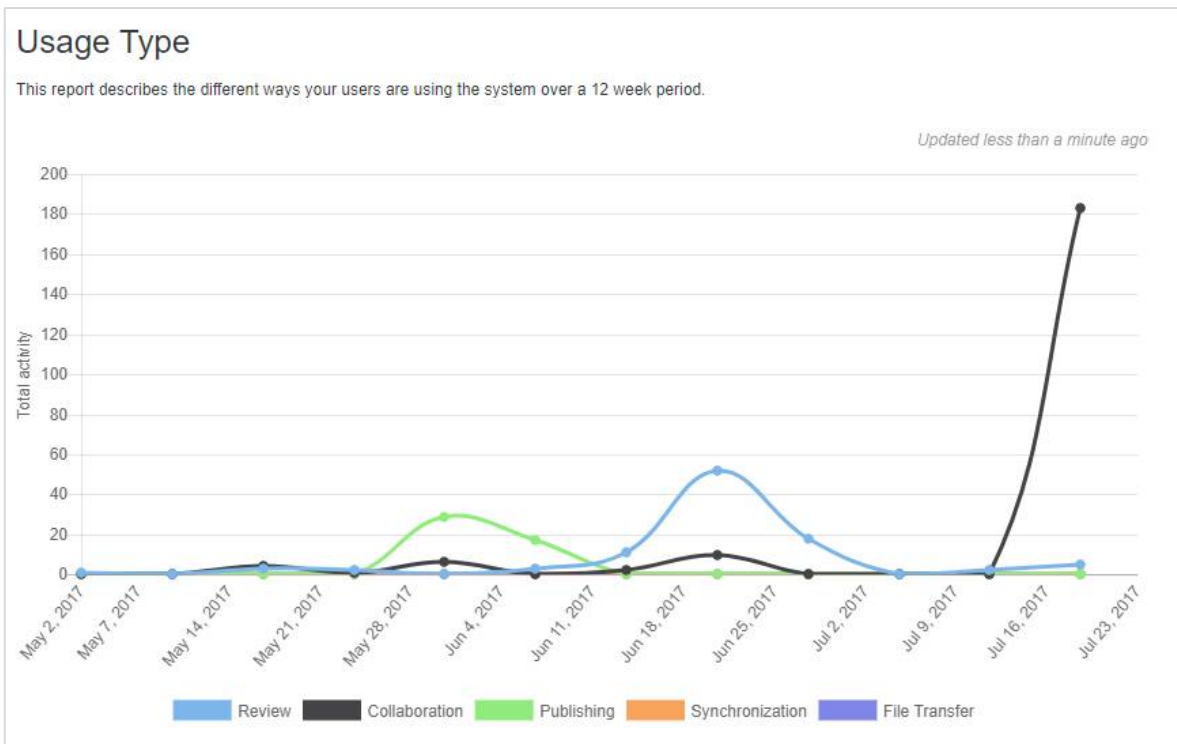
- Activity
- Usage Type
- Apps

Activity



The Activity report shows the types of activity users are performing in Workshare over the last 12 weeks. The activities recorded are logging in, opening files, uploading files, commenting and sharing.

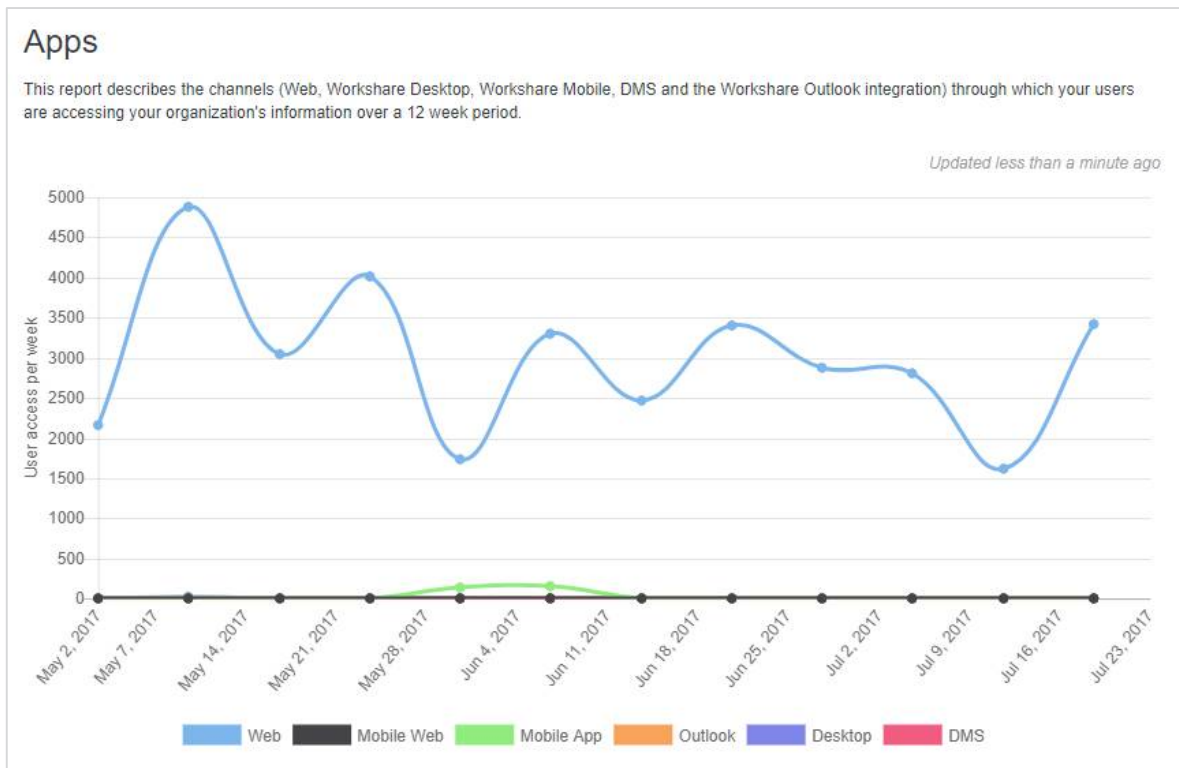
Usage Type



The Usage Type report looks at the different use cases being adopted by your users. It shows:

- **Review** by comments made: This demonstrates usage for reviewing or signing off files, with files being shared then commented on.
- **Collaboration** by guests uploading files: This shows the guests that are invited and bringing content to collaborate on.
- **Publishing**: This shows the number of files uploaded and then viewed by other members. This indicates that Workshare is being used to distribute information - a user uploads files then others consume the content.
- **Synchronization** by downloads via apps: This indicates the users downloading the Workshare desktop app and Workshare mobile apps and syncing files to their computer or mobile device to work remotely or offline.
- **File transfer** by folders sent: This indicates multiple or large file transfer with users uploading files to folders then sharing with others.

Apps



The Apps report shows how users are accessing Workshare - through a web browser, a mobile browser, the mobile app, the desktop app, via Outlook or through a DMS.

Managing Users

Users are people in your network using one of your Workshare licenses. You may add users to your account, individually or all at once using a CSV file. Additionally, any user who is part of your domain will be assigned to your company account even if they sign up for a personal account.







Guests are people invited by any of your users to share data.

Searching for a User

Users on your account share the same domain name.

To view users on your account:


Select the **User Management** tab and select the **Users** radio button.

User Management								
<input checked="" type="radio"/> Users: Members of your account. You may manage Users and their data. <input type="radio"/> Guests: People who are not members of your account, but have been invited to share data by your users.								
Search...		Show: All users		Add User		Add Bulk Users		
First Name	Last Name	Email	Created On	Guests	Storage (MB)	Role	Compliance Admin	Status
	David	Rutherford	david.rutherford@workshare.com	3 years ago	0	0.05	user	unvalidated
	Oscar	Castro	Oscar.Castro@workshare.com	4 years ago	0	0.00	user	active
	Natasha	Kubacki	natasha.kubacki@workshare.com	4 years ago	0	1.18	user	active
	Crispin	Ingber	Crispin.Ingber@workshare.com	4 years ago	0	15.79	user	active
	James	James	james@workshare.com	4 years ago	0	1.18	user	active
	John	Smith	John.Smith@workshare.com	4 years ago	0	0.00	user	unvalidated

You can see a list of all users you have invited to your account. Their status may be:

- **Active** – licensed user on your account
- **Unvalidated** – user you invited to the account but who has not yet validated their account
- **Suspended** – user you have suspended from your account – perhaps an employee who has left the company

To search for a specific user, enter a name (or part of name) in the search fields and press enter on your keyboard. The list shows just the users that match your search criteria.

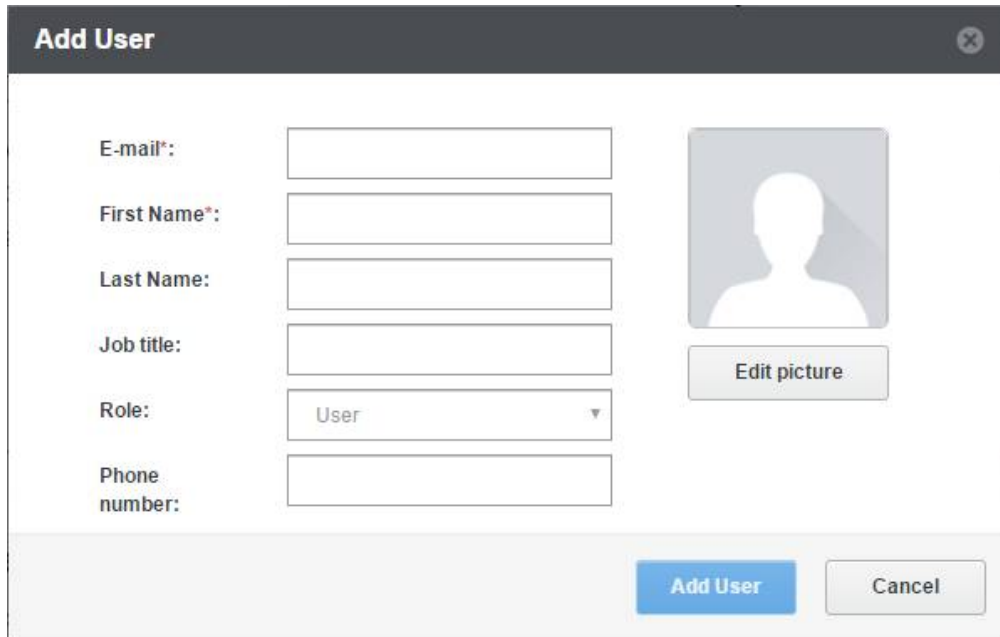
Click  to the left of a user to edit the details of that user or to suspend the user or disconnect devices the user may be using to access Workshare.

Adding Users

You can add single users to your account or add up to 100 users at one time using a CSV file. Adding a user “invites” that user to your Workshare account. Only when the invited user validates their account are they considered a licensed user on your account and their status will become “active”.

To add a single user:

1. Select the **User Management** tab.
2. Click **Add User**.



3. In the **E-mail** field, enter the email address of the user – this must be from your registered email domain.
4. In the **First Name** field, enter a name for the user.
5. Complete the other fields and add a picture for the user if required. The user will be able to edit these personal settings when they have validated their account. The user cannot change their registered email address.

Note: The default role for a user is that of **User**. If you want to create an administrator user with access rights to the Admin Console, select **Account Admin** from the **Role** dropdown list.

6. Click **Add User**. A registration email is sent to the email address specified and the user is invited to validate their Workshare account.

Adding Multiple Users

You can add up to 100 users to your account at one time using a CSV file containing the user account information. You will need to create a CSV file with the following mandatory headers: “email address” and “first name”. You may also include the following headers: “last name”, “job title” and “phone number”.

To add multiple users:

1. Select the **User Management** tab.
2. Click **Add Bulk Users**.

Add Bulk Users

Create and update up to 100 accounts at once

1. Create your CSV file

You need to create a CSV(comma separated value) file with the user account information.

The CSV file must include a header, or first line, that defines the fields in your table. The headers should be: email address (mandatory field), first name (mandatory field), last name, job title and phone number.

	A	B	C	D	
1	<i>email address</i>	<i>first name</i>	<i>last name</i>	<i>job title</i>	<i>phone number</i>
2	email@example.com	John	Smith	Front End Developer	12345678910
3	email@example.com	Jane	Smith	Interaction Designer	12345678910

2. Upload the list of user accounts in CSV format


No file chosen

3. Click **Choose File** and browse to where you have saved your CSV file with all your user details.
4. Select the file and click **Open**.
5. In the *Add Bulk Users* window, click **Import**. The user details are added to your account and a registration email is sent to all the email address specified. The users are invited to validate their Workshare account.

Suspending Users

Suspending a user from your Workshare account prevents the user from logging into Workshare from any device. This is useful when someone resigns or is made redundant and leaves your company. The user can no longer log in to Workshare with their credentials in a browser or from any device. The user still appears on the list of users with a status “suspended” and consumes one of your account licenses. A suspended user can be reactivated in the future if required. If you want to permanently remove a user, refer to *Deleting Users*.

To suspend a user:

1. Select the **User Management** tab.
2. Select the **Users** radio button.
3. Click  to the left of the user you want to suspend. The *Edit User* window is displayed.
4. Scroll down to the **Security** area.

Security
Reset User Password

Resetting a password will immediately terminate this user's access to Workshare, including linked devices and active web sessions. The user will be sent a notification email with instructions and a link to reset their password.

Reset Password

Manage User Account

If you need to disable access to an account, you can suspend the user. This disables the account without deleting the user's profile and will unlink all devices and the web browsers.

Account: Active

Suspend Account

If you need to permanently remove a user and all their data, you can delete their account entirely.


Delete Account

5. Click **Suspend Account**. A confirmation message is displayed.
6. Click **Suspend** to confirm. The user is logged out of Workshare on all devices where they are currently logged in. Their Workshare login credentials will no longer enable them to access Workshare.

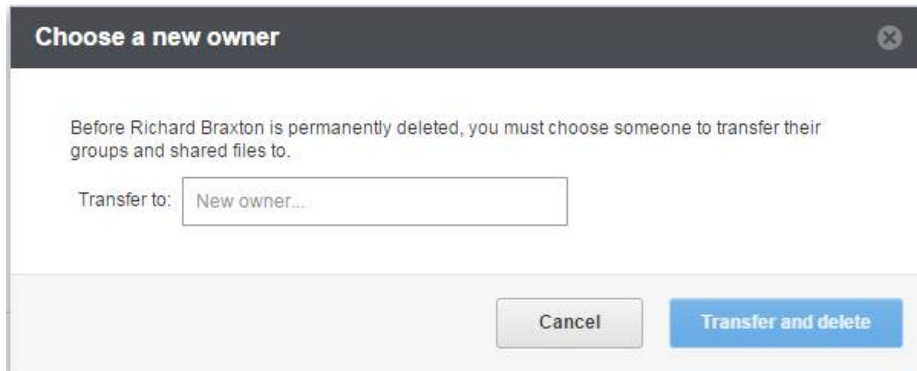
Deleting Users

As an administrator of your account you can delete users and transfer ownership of their files to someone else. In order to delete a user completely, you must specify another user to take ownership of the deleted user's files and folders and groups.

To delete users:

1. Select the **User Management** tab.
2. Select the **Users** radio button.
3. Click  to the left of the user you want to delete. The *Edit User* window is displayed.
4. Scroll down to the **Security** area.

- Click **Delete Account**. If there is no content in the user's account, the account will be deleted and you will not be asked to choose a new owner. If there is content in the user's account, the *Choose a new owner* dialog is displayed.



- Enter the email address of the person who is to take ownership of the files.
- Click **Transfer and delete**. All the files and folders and groups owned by the user are transferred to the specified new owner and the user is permanently deleted.

The person taking ownership of the content will be given Owner status of all the files, folders and groups that the deleted user previously owned and the deleted user will be removed from them. All folder members and group members will stay the same as well as the settings/permissions for the folders and groups.

The deleted user will no longer appear as a member of any folder or group. The old user is permanently deleted.

What happens to transferred content?

All the files and folders the deleted user owned in Folders are moved into the new owner's Folders area and stored in a new folder called "[UserName]'s files".

Received		
▶ Sent		
▶ All training	Sep 04 2015	Elizabeth Morris
▶ Concept	Sep 10 2015	Anna Wood
▼ Larry Grisham's files	Sep 14 2015	Elizabeth Morris
Draft files	Sep 14 2015	Larry Grisham
▶ My Files	Sep 14 2015	Elizabeth Morris
▶ Reports	Sep 14 2015	Larry Grisham
▶ Strategy	Apr 04 2014	Anna Wood
▶ Procedures	Apr 02 2014	Lucy Woo


Note: If the new owner was a member of one of the deleted user's folders, the new owner will now see that folder as a subfolder of "[UserName]'s files". The folder will also have a yellow icon because it is now owned by the new user.

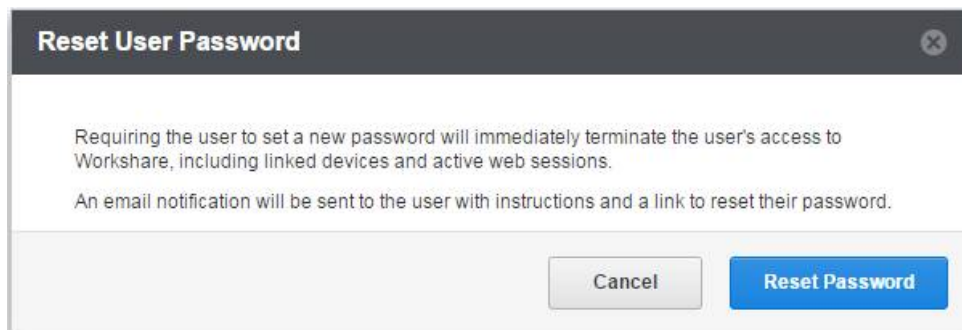
All of the deleted user's groups will be moved to the new owner's Groups area and all of the deleted user's deals will be moved to the new owner's Transact area.

Resetting User's Password

You can reset any user's password, for example, when a user forgets their password.

To reset a password:

1. Select the **User Management** tab.
2. Select the **Users** radio button.
3. Click  to the left of the user whose password you want to reset. The *Edit User* window is displayed.
4. Scroll down to the **Security** area and click **Reset Password**.



5. Click **Reset Password**. The user will immediately be logged out of Workshare on any devices or web browser and they will be sent an email with instructions on resetting their password.


Unlinking User's Devices

Unlinking a device, such as a mobile phone, an iPad or a laptop, logs the user out of Workshare on that device. When unlinking a device running the Workshare desktop app, you can also ensure that all Workshare files are deleted from the Workshare folder on that device. This is useful when a user has lost a device or had it stolen.

In addition, you can end a user's browser session, effectively logging the user out of the Workshare web app.

After being logged out, the user can log back in immediately using their Workshare login credentials.

To unlink a device/end a web session:


1. Select the **User Management** tab.
2. Select the **Users** radio button.
3. Click  to the left of the user you want to suspend.

4. Scroll down to the **Devices** area.

Devices



Linked Devices

These devices are currently linked to your Workshare account. [Clear unlink pending](#)

Device Name	Country	Registered Date	Last Activity	
 LH1-HELENS-03	United Kingdom	23 minutes ago	about a minute ago	Unlink

Web Sessions

This user is currently logged into Workshare on these browsers. [End all Sessions](#)

Browser Name	Country	Last Activity	
 Chrome	United Kingdom	less than a minute ago	current Session
 Chrome	United Kingdom	less than a minute ago	end session

5. In the **Linked Devices** list, click **Unlink** to the far right of the device you want to unlink.

Unlink Device

You are about to unlink Workshare Desktop from Elizabeth Morris's account

This device will no longer be synchronized and the user will be logged out. If you have security concerns about this device, changing the user's password is also recommended.

☐ Elizabeth Morris should be able to keep files already synchronized to this device.

[Cancel](#)
[Unlink Device](#)

6. Leave the checkbox selected if you want to leave the Workshare data already synchronized to the selected device on the device. Deselect the checkbox if you want the Workshare folder containing the synchronized data to be removed from the selected device.
7. Click **Unlink Device** to confirm. Workshare will close on the selected device and the user will need to log in again. Once the device is unlinked, it will no longer appear in the **Linked Devices** list. If the device is closed or damaged, it won't be unlinked until it is powered up again. In this case, "unlink pending" is displayed next to the device in the **Linked Devices** list. You can click **Clear unlink pending** to remove devices with the status "unlink pending" from the **Linked Devices** list.

8. In the **Web Sessions** list, click **end session** to the far right of the browser session you want to end. The user is logged out of Workshare and their browser displays the Workshare login window. If there are several browser sessions running, you can click **End all Sessions** to log the user out of all browser sessions.


Set different file storage locations for your users

If you have an Integration Edition account, you can select different storage locations for individual users from the **User Management** tab.

Data residency refers to the physical or geographic location of an organization's data or information and the legal or regulatory requirements imposed on data based on the country or region in which it resides.

Global organizations spread across multiple regions (such as a global law firm with offices spread across the US, EMEA and APAC) need to be able to store client data (files) in distinct regions due to regulatory, customer policy and performance reasons.

To assign a storage location to a user:

1. Select the **User Management** tab.
2. Select the **Users** radio button.
3. Click  to the left of the user whose storage location you want to change. The *Edit User* window is displayed.
4. Scroll down to the **Storage location** area.

Storage location
Select the location for this user's data.
From now on, files uploaded to this user's folders, groups and deals will be stored in the selected location. Existing content will not be moved.
The user will not notice any changes and will be able to access files at anytime.

Default location ▼

Apply

5. Select the location you require for the user from the dropdown list. The options include:
 - **Default location:** The default account location, as specified in the Data Management tab. This is the location each user is assigned by default. If you have no rights to change the storage location or you haven't yet done so, the user will be using the account's default location.
 - **Workshare storage locations:** The alternative secure Workshare-approved geographical locations.
 - **Custom storage locations:** Any private or on-premise data storage locations you have set up.

- Click **Apply**. From now on, any files that are uploaded to a folder, group or deal that this user owns will be located in the selected storage location. Files that have already been uploaded will not be moved to the new location. The user will not notice any changes and can access their files at any time.

Note: When a new version is added to an existing file, the existing file will be in the old location and the new version will be in the new location.

Example

The Minton Dresden Stafford LLP account has file data stored in the default Workshare storage location in **EU (Ireland)**. Minton set the file storage location for one user, Jeremy Stafford, to **US West (Northern California)**. If Jeremy creates a group called Project Sunrise and invites Lucy, any files that either of them uploads to Project Sunrise will be stored in **US West (Northern California)**. If Lucy creates a deal called Sunset Deal and invites Jeremy, any files that either of them uploads to Sunset Deal will be stored in **EU (Ireland)**.

Removing Guests

Guests are all people who are not users on your account but have been invited to share data by a user on your account. You can see the details of all guests invited by all users on your account and remove guests if necessary. Removing a guest will remove the guest from all folders that they have been invited to share and become members, and deny them access to all of your Workshare data.

To remove a guest:

- Select the **User Management** tab.
- Select the **Guests** radio button. All the guests on your account are listed.

User Management				
<input type="radio"/> Users: Members of your account. You may manage Users and their data.				
<input checked="" type="radio"/> Guests: People who are not members of your account, but have been invited to share data by your users.				
First Name	Last Name	Email	Invited By	Invited On
Manuel		manuel@shyden.com	Joseph Stain	4 years ago
Will	Test	willm3@gmail.com	Will Evans	about a year ago
Ian	Evans	user1440094289.0521352@wde...	Joseph Stain	4 years ago
Jonathan	Last Name	willm3-1@gmail.com	St	about a year ago
Ian		ian@shyden.com	Joseph Stain	4 years ago
Ryan	Stearns	ryanpule@gmail.com		4 years ago
Simon	Cook	user1438899567.8557432@wde...		3 years ago
Max		maxtan_@hotmail.com		4 years ago
Philip		phip@wde.net		4 years ago

You can see which user on your account invited the guest and when. If several users have invited the same guest, that guest will appear once on the list and **Invited By** will show the latest user to invite the guest.

3. Select **remove access** to the far right of the guest you want to remove.



4. Click **Confirm**. The selected guest is removed from all folders where they are members and can no longer access content in Workshare.

Note: When a user removes a guest by removing a member from a folder, the guest is removed from just that folder– the guest may still be in this list if the guest was invited by the user to other folders or by other users to other folders.

Setting Auto-Delete Policy

A policy can be set so that files are automatically deleted from Workshare if they have not been updated after a specified time period. Setting an auto-delete policy is useful when you don't want data to live outside your DMS for longer than needed.


Note: The functionality of the **Policy Management** tab is available for Sharing Edition and Integration Edition accounts only.

To set an auto-delete policy:

1. Select the **Policy Management** tab and ensure **File Storage** is selected in the left menu.

File storage


Choose your policies to apply


Control how long your files remain in Workshare

Delete all files that haven't been updated for: ☐ Never auto-delete files

☒ Days ▼

ⓘ Files and empty folders not accessed within your chosen period will be moved to the recycle bin for 7 days before being permanently deleted. The folder administrator(s) will be notified by email before auto-deletion. Accessing includes all file-related actions in Workshare, e.g. opening, sending and renaming. It does not include: opening a file in Windows Explorer or Mac Finder; syncing a file with Workshare Desktop; modifying the folder where the file is stored, i.e. renaming, moving, or adding/removing members.

2. Select the radio button to delete files and specify the number of days/weeks/years. The minimum periods are 30 days/5 weeks/1 year.
3. Click  and then click **Save changes** in the confirmation dialog.

Files will be automatically *deleted* if they have not been *updated* after the specified number of days/weeks/years.

- "Deleted" means moved to the recycle bin first and purged after 7 days.
- "Updated" includes any of the following:
 - Move file or folder
 - Create/upload new
 - Add new version
 - Download (manual)
 - Rename file
 - View file
 - Compare file (first instance only)
 - Send via secure file transfer
 - Visit to file by not-logged-in visitors

- Comment on file
- Add member to folder

If any of these events happen then the auto-delete counter is reset and the timer for that file starts counting again.

Reports

You can download a list of all users and guests on your account and you can also generate report that show who has access to all of your company data in Workshare.

Exporting User List

As an Account Admin user, you can export a report of all users and guests in your account. The report is in CSV format and provides details of every user and guest on your account.

To run the report:

1. Select the **Reports** tab and select **Export users** in the menu on the left.
2. Click **Run report now**. Your report will be generated and will appear in the **Report history** table. It may take a few minutes to create the report. While it's being created, you can leave this page and come back later.
3. Click **Download** to the far right of the report in the **Report history** table.
4. The CSV file is downloaded and you can open it in Excel. The following information is given for each user and guest:
 - **Type**: Whether the person is a user or a guest.
 - **First name**: The first name of the user/guest.
 - **Last name**: The last name of the user/guest.
 - **Email**: The email address (used for access to Workshare) of the user/guest.
 - **Status**: Whether the user/guest is active, unvalidated or suspended.
 - **Last access time**: The last date and time the user/guest accessed Workshare.
 - **Created on**: The date and time the person became a user/guest.
 - **Invited by**: The email address of the user inviting the user/guest.
 - **Storage (MB)**: How much storage the user/guest is using.
 - **Account admin**: Whether the user/guest is an Account Admin user.
 - **Compliance admin**: Whether the user/guest is a Compliance Officer user

User Activity Report

Due to the sensitivity of the data in a user activity report, you must be verified by Workshare as a compliance officer for the account in order to have access to such a report. Contact Workshare Support at support@workshare.com for more information on how to get verified.

When you are a compliance officer user, you can track what your users have been doing. The user activity report logs actions that have been performed on your Workshare account, including creating folders, deleting files, adding versions, changing permissions and more.

Note: The report does not provide information when your users perform actions as guests on other people's Workshare accounts.

The user activity report is generated as a CSV file. Each row in the file represents an event or action with the following properties:

Property	Description
Time	The exact moment the action is triggered. If an action takes some time to be processed (for example, deleting a folder) it will appear in the log only when it is successfully completed. However, the timestamp will be the moment the action is triggered. Events are displayed in chronological order.
Correlation ID	An ID for the action. Some actions maybe be made up of a series of actions. For example, a "copy folder" action will be made up of several "copy file" actions. Each of the "copy file" actions will have the same correlation ID.
Agent name	The user name of the person performing the action. Some actions are system actions with no user. For example, expire folder. If the permanently delete action has no agent details, it is because it was an auto delete, if there are details, it means a user deleted items from the recycle bin.
Agent UUID	The unique identifier of the person performing the action.
Agent email	The email address of the person performing the action.
IP	The IP address of the computer of the person performing the action.
Action	The action performed, such as create folder, delete file. The user could perform one action, such as copy file, but this would be listed as two actions – copy and create.
Resource	The item the action was performed on. This could be folder, file, folder permissions, folder members, file comparison. When the item is a group, it appears in the report as a folder.

Property	Description
Resource name	The name of the item the action was performed on. If the resource is folder, folder permissions or folder members, this will be the name of the folder. If the resource is file or file comparison, this will be the name of the file.
Resource UUID	The unique identifier of the item the action was performed on.
Resource path	The location in Workshare of the item the action was performed on.
Owner name	The name of the owner of the item the action was performed on.
Owner UUID	The unique identifier of the owner.
Owner email	The email address of the owner.
Info	Additional information. For example, whether metadata was cleaned during an upload action, the original location in a move action, the name and UUID of a group if the folder was actually a group.

Note: The actions Workshare tracks are detailed in this [knowledge base article](#). Workshare started collecting data for user activity reports on **14 December 2016**. Information about activity before this date is not available. If further actions are tracked in the future, the start date for the availability of that data may be different.

To run a user activity report:

1. Select the **Reports** tab and select **User activities** in the menu on the left.
2. Select the time period for your report from 1 to 60 days. The start date cannot be before 14 December 2016.
3. Click **Generate report**. Your report is generated and downloaded to the download location on your computer.

File Permissions Reports

Due to the sensitivity of the data in a file permissions report, you must be verified by Workshare as a compliance officer for the account in order to have access to such a report. Contact Workshare Support at support@workshare.com for more information on how to get verified.

When you are a compliance officer user, you can monitor who has access to which files in Workshare by creating a file permissions report. This report is in CSV format and provides details of every user and guest (by email and domain) in one column. Across each row, you'll see the name of the files that person has access to and the locations where those files are stored.

You can generate your report on demand or you can schedule it to be generated automatically on the first of every month.

To run the report now:

1. Select the **Reports** tab and select **File permissions** in the menu on the left.
2. Click **Run report now**. Your report will be generated and the link to download it will appear in the **Report history** table. It may take a few minutes to create the report. While it's being created, you can leave this page and come back later.

To schedule a report:

1. Select the **Reports** tab and select **File permissions** in the menu on the left.
2. Click **ON** to the right of **Schedule monthly report**. On the 1st day of the following month, your report will be generated and the link to download it will appear in the **Report history** table.

Configuring Services

Note: The functionality of the **Services** tab is available for Sharing Edition and Integration Edition accounts only.

Integrations

If you have a Sharing or Integration Edition account, you can download the iManage and OpenText eDocs integrations from the **Services** tab. These integrations enable users to upload files and folders to Workshare from within OpenText eDocs or Autonomy iManage. In this way users can share documents with multiple people outside the corporate firewall.

To download an integration:

1. Select the **Services** tab and select **Integrations** in the left menu.
2. Click to download the relevant integration. Instructions for installing/configuring the integration are found in the administration guides available from the [Workshare knowledge base](#).

Single Sign-On

If you have an Integration Edition account, you can configure Single Sign-On to provide a secure, convenient and faster way for signing in, enabling users to log in to Workshare using their company credentials – their company email address and login details.

To set up SSO:

1. Select the **Services** tab and select **Single Sign-On** in the left menu.

2. You need to set up your email domain, configure your SSO connection and then enable your SSO connection. These steps are described fully in the Workshare Single Sign-On guide available from the [Workshare knowledge base](#).

Workshare API

If you have an Integration Edition account, you can access the Workshare API.

The Workshare API exposes key functionalities for easily sharing and collaborating outside the firewall. The API is language agnostic (using HTTP RESTful JSON interface) which is easy to consume by any programming libraries. The code is streamlined offering only the most common resources in a simplified way, to make it as easy as possible to work with and to build upon.

Look here <http://www.workshare.com/resources/developers/api-documentation> for examples of usage and server responses that are self-explanatory so if you are missing a mandatory parameter or have added a non-expected one by mistake, the server will tell you so.

To start using the API simply register your app and get a registration key. The registration key is a client specific token that will authenticate your app's calls to the Workshare platform.

To register your app:

1. Select the **Services** tab and select **Workshare API** in the left menu.
2. Click **Register new App**.
3. Enter your details and click **Register App**.

Modifying Account Settings

Your account settings are shown in the **Account Settings** tab. You can customize and brand your Workshare account from here as well as set email preferences.

To view account settings:

Select the **Account Settings** tab and select **Account Details** in the Account Settings menu on the left.

You can see the same account and subscription information as displayed in the top banner of the Admin Console.

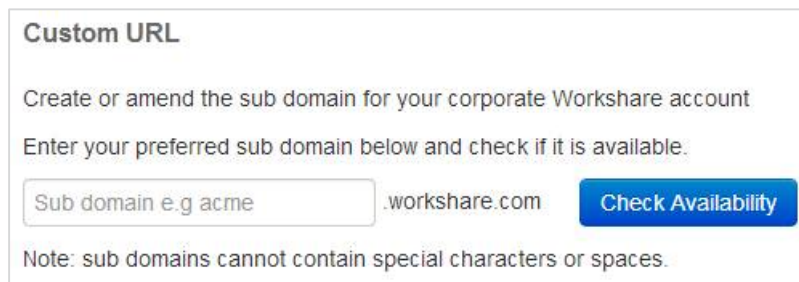
Creating a Custom URL

You can create a custom sub domain for your corporate Workshare account. This means that access to Workshare would be [https://\[sub domain\].workshare.com](https://[sub domain].workshare.com) rather than <https://my.workshare.com>.

Note: If you specify a custom URL, then the Workshare Sign in dialog will include the logo and wallpaper you have set for your account.

To create a custom URL:

1. Select the **Account Settings** tab and select **Branding** in the Account Settings menu on the left.



The screenshot shows a form titled "Custom URL". Below the title, it says "Create or amend the sub domain for your corporate Workshare account" and "Enter your preferred sub domain below and check if it is available." There is a text input field containing "Sub domain e.g acme", followed by ".workshare.com". To the right of the input field is a blue button labeled "Check Availability". Below the input field, a note states: "Note: sub domains cannot contain special characters or spaces."

2. In the **Custom URL** area, enter your preferred sub domain in the text box. You cannot use special characters or spaces.
3. Click **Check Availability**. If the sub domain is available, the button becomes **Create & Apply URL**.
4. Click **Create & Apply URL**. The custom URL is applied and your corporate access to Workshare is now [https://\[subdomain\].workshare.com](https://[subdomain].workshare.com).

You can amend this sub domain at any time.

Branding Workshare

You can personalize Workshare to show corporate branding. You can replace the default Workshare wallpaper, add a corporate logo in the header and change the topbar theme. If you specify a custom URL, then the Workshare Sign in dialog will also include the logo and wallpaper you have set for your account.

Additionally, any logo you specify will be included on the front page of the index for your closing binder/bible in Transact.


To personalize Workshare:

1. Select the **Account Settings** tab and select **Branding** in the Account Settings menu on the left.

Set the wallpaper

You are using the default Workshare wallpaper. Enhance your brand by adding a wallpaper of your choice.

Current Wallpaper




Recommended file size: 1920px by 1080px (72dpi)

Choose File

2. In the **Set the wallpaper** area, click **Choose File** and select a wallpaper of your choice. The recommended file size is 1920px by 1080px/72dpi.
3. Click **Open**.
4. In the **Choose the header logo** area, click **Choose File** and select a logo file (maximum size is 200px width by 120px height at 72dpi).

Choose the header logo

Select a logo from your computer

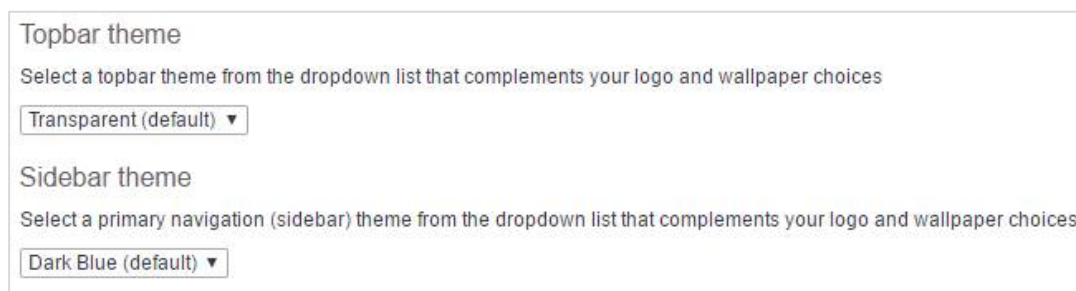


Max: 200px wide by 100px high at 72dpi

Change **Remove**

5. Click **Open**. This logo will appear in the header of your Workshare account and, if you specified a custom URL, the Workshare Sign in dialog. It will also be included on the front page of the index for your closing binders/bibles in Transact.

6. In the **Topbar theme** and **Sidebar theme** areas, select color schemes from the dropdown lists to complement your wallpaper and logo.



The screenshot shows a configuration panel with two sections. The first section, 'Topbar theme', includes a text prompt 'Select a topbar theme from the dropdown list that complements your logo and wallpaper choices' and a dropdown menu currently set to 'Transparent (default)'. The second section, 'Sidebar theme', includes a text prompt 'Select a primary navigation (sidebar) theme from the dropdown list that complements your logo and wallpaper choices' and a dropdown menu currently set to 'Dark Blue (default)'.

Configuring Activation and User Engagement Emails

When you install Workshare Professional/Protect 8 (and above) across your organization, your users will be registered against your Workshare account. A validation email is sent to each user that has the Professional/Protect client installed on their desktop. Only one automatic email is sent and only to these users.

The installation of Workshare Professional/Protect installs the Workshare Outlook COM Addin and when a user first runs Outlook, Workshare obtains their email address and generates an account on Workshare using that email address and sends a validation email to that email address. This email requests the user to validate their details in order to activate their Workshare account.

If you do NOT want your users to receive a validation email, you can disable the option BEFORE deploying Professional/Protect across your organization.

To turn off validation emails:

1. Before you deploy Workshare Professional/Protect, go to my.workshare.com.
2. Log in.
3. Click your user name in the Workshare topbar and select **Admin Console**.

4. Select the **Account Settings** tab and select **Email Preferences** in the Account Settings menu on the left.

Email Preferences

Control which system emails are sent to your users.

User Engagement Emails
☒ ON ☐ OFF

Provides suggestions to aid adoption and highlight useful features based on user activity.

License Activation Emails
☒ ON ☐ OFF

An email sent to all your individual users who have the Workshare products installed to register their details to activate their online account.

5. Click **OFF** to the right of **License Activation Emails**.

Now when you deploy Workshare Professional/Protect, your users will not receive a validation email.

An account will still be generated for each user on Workshare but it will remain “unvalidated”. A user will usually need a Workshare account in order to authenticate their license for Professional/Protect.

User Engagement Emails

User engagement emails are marketing emails sent to users to encourage use of Workshare. You can disable these emails so users will not receive them. Follow the procedure described above and click **OFF** to the right of **User Engagement Emails**.

 Workshare Ltd.

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