

WORKSHARE CONNECT

ADMIN GUIDE



COMPANY INFORMATION

Workshare Connect Admin Console

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TABLE OF CONTENTS

Introducing the Workshare Connect Admin Console	5
Managing Data	7
Setting Storage Location	7
Managing Devices	8
Managing Web Sessions	10
Analyzing Usage	11
Activity	11
Usage Type	12
Apps	13
Managing Users	14
Searching for a User	14
Adding Users	15
Adding Multiple Users	16
Suspending Users	16
Deleting Users	17
What happens to transferred content?	18
Resetting User's Password	19
Unlinking User's Devices	19
Removing Guests	21
Setting Auto-Delete Policy	22
Reports	23
Exporting User List	23
File Access Reports	24
Configuring Services	24
Integrations	24
Single Sign-On	25
Workshare Connect API	25
Modifying Account Settings	25
Creating a Custom URL	26

Branding Workshare27

Configuring Activation and User Engagement Emails28

 User Engagement Emails29

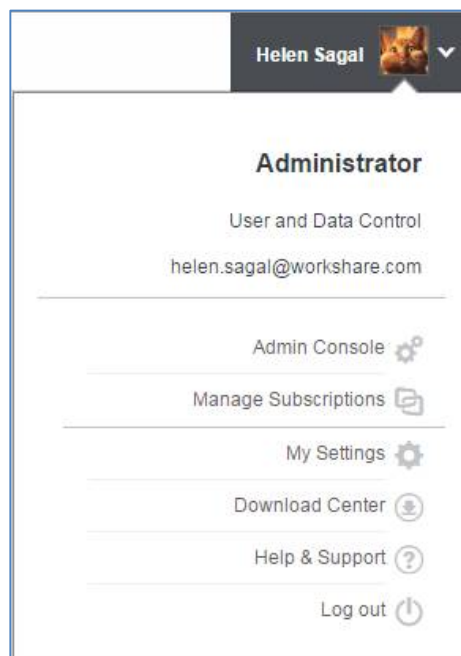
The Download Centre29

INTRODUCING THE WORKSHARE CONNECT ADMIN CONSOLE

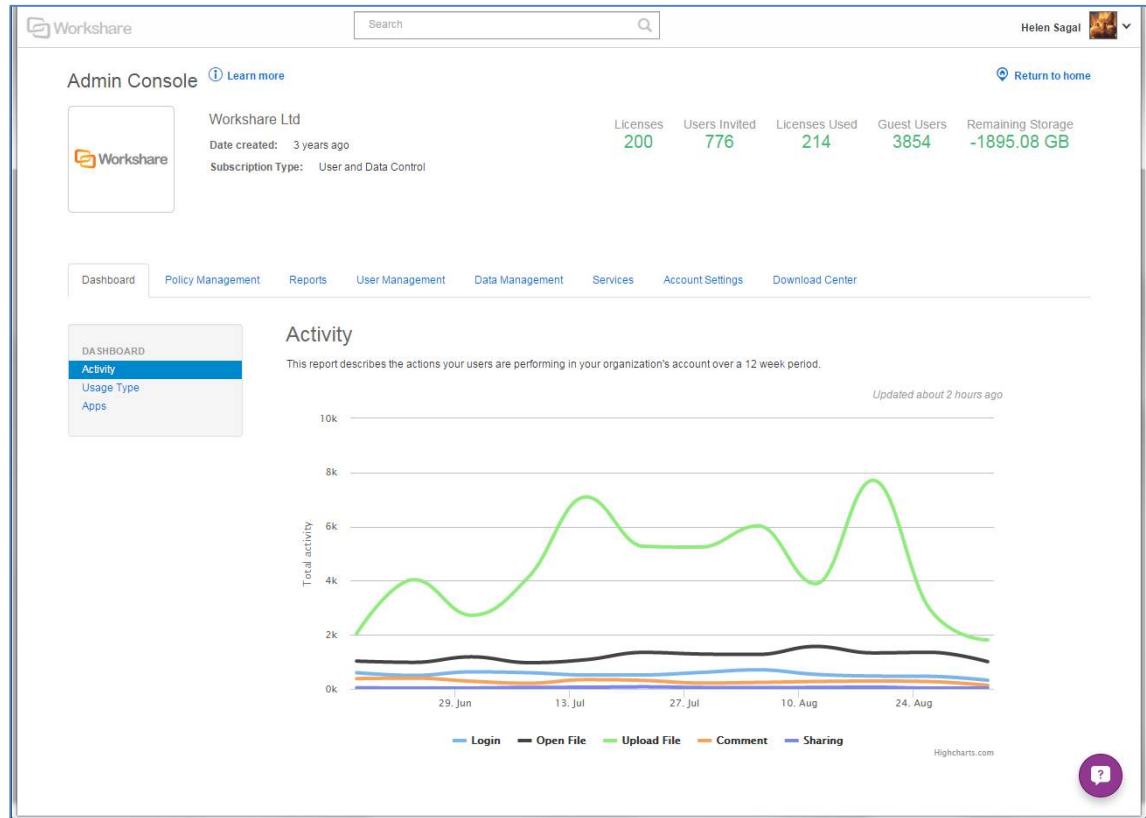
The Workshare Connect Admin Console enables IT to have full control over access rights to files and documents, enforcing corporate policies and rights to groups and individuals. The Admin Console provides:

- 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 Connect) can access the Admin Console by clicking their user name in the Connect topbar.



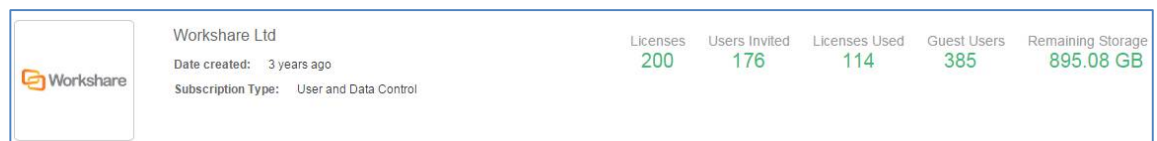
Select **Admin Console**. By default, the Activity graph on the **Dashboard** tab is displayed.



The following tabs can be available on the Admin Console:

- Dashboard
- Policy Management
- Reports
- User Management
- Data Management (the functionality of this tab is available for User & Data Control accounts only)
- Services (the functionality of this tab is available for User & Data Control accounts only)
- Account Settings
- Download Center

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 Type	The type of subscription you have - either User Control or User and Data Control.
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.
Remaining Storage	The amount of storage remaining on your account.

MANAGING DATA

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

Note: The functionality of the **Data Management** tab is available for User & Data Control accounts only.

Setting Storage Location

Workshare Connect 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 Europe. If you have a User & Data Control account, you can change this location to another secure Workshare-approved geographical location or, if you have the Connect Hybrid add-on, you can specify your own private or on-premise data storage location.

To change your data storage location:

1. Select the **Data Management** tab.
2. Ensure **Storage** is selected in the left menu.

Storage

Choose the storage location

You can select one of our available locations where your data is or choose a preferred server.

☒ **Workshare storage location**

Note: Data stored after the change is applied will continue to be stored at the previous location.

Your 123 users are storing 2.45 GB. *increase your storage allocation at any time.*

Capacity: 500 GB
Used: 2.45 GB
Remaining: 497.55 GB

EU (Ireland) ▼

EU (Ireland)
US Standard
US West (Oregon)
US West (Northern California)
Asia Pacific (Singapore)
Asia Pacific (Tokyo)
Asia Pacific (Sydney)
South America (Sao Paulo)

Should you require more storage space, you can contact our support team to help you.

3. Select an alternative location from the dropdown list.
4. Click **Change location** and click **OK** to confirm the change. Any future data stored will be stored in the new location. 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 purchased the Connect Hybrid add-on, you can configure your own private or on-premise data storage site. Please contact Workshare Customer Support for further information.

Managing Devices

At any time, you can see ALL the devices currently linked to your Workshare Connect 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 Connect data. Unlinking a device logs the user out of Connect on that device. When unlinking a device running Workshare Connect for desktop, you can also ensure that all Connect 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	Khromova	vera.khromova@workshare.com	 In1-vera-01	about an hour ago	Unlink
about a minute ago	United Kingdom	Chris	Phillips	chris.phillips@workshare.com	 In1-chrisp-02	about 5 hours ago	Unlink
less than a minute ago	United Kingdom	Christine	Davies	christine.davies@workshare.com	 In1-hillman.workshare.com	about 5 hours ago	Unlink
3 minutes ago	United Kingdom	Helen	Sagal	helen.sagal@workshare.com	 LN1-HELENS-05	about 5 hours ago	Unlink
less than a minute ago	United Kingdom	Mei	Tan	mei.tan@workshare.com	 In1-whit-10.wo LN1-HELENS-05	about 5 hours ago	Unlink
about an hour ago	United States	George	Lavallee	George.Lavallee@workshare.com	 Workshare Desktop	about 9 hours ago	Unlink
less than a minute ago	United Kingdom	Sara	Abed	sara.abed@workshare.com	 In1-sara-01	about 22 hours ago	Unlink
2 minutes ago	United States	Peter	Concannon	peter.concannon@workshare.com	 PeterC-T430U	about 22 hours ago	Unlink

All devices currently accessing your Connect 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 Connect.
- Country** Where the device is located.
- First Name** The first name of the user accessing Connect.
- Last Name** The last name of the user accessing Connect.
- Email** The email address of the user accessing Connect.
- Device Name** The name of the device.
- Registered Date** The date the user registered as a Connect user.

To unlink a device:

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

Unlink Device

You are about to unlink LN1-HELENS-05 from Helen Sagal'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.

☐ Helen Sagal should be able to keep files already synchronized to this device.

Cancel

Unlink Device

2. Select the checkbox if you want to leave the Connect 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. Connect 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 Connect account for ALL users of the account. Where necessary, you can end a browser's session giving you full control over access to your Connect data. Ending a browser session effectively logs the user out of Connect for web.

After being logged out, the user can log back in immediately using their Connect 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	Udugba	efe.udugba@workshare.com	 Chrome	end session
less than a minute ago	United Kingdom	Helen	Sagal	helen.sagal@workshare.com	 Chrome	<i>current session</i>
less than a minute ago	United Kingdom	Jen	Hoang	jen.hoang@workshare.com	 Chrome	end session
about a minute ago	United Kingdom	Clarence	Sittampalam	clarence.sittampalam@workshare.com	 Safari	end session
about a minute ago	United States	Anthony	Molina	anthony.molina@workshare.com	 Chrome	end session
about a minute ago	United Kingdom	Matthew	Hodgson	matthew.hodgson@workshare.com	 Chrome	end session
2 minutes ago	United Kingdom	quang	chou	quang.chou@workshare.com	 Chrome	end session
2 minutes ago	United Kingdom	Mark	Lendrum	mark.lendrum@workshare.com	 Chrome	end session

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

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

To end a browser session:

In the **Web Sessions** list, click **end session** next to the browser session you want to end. The user is logged out of Connect for web and their browser displays the Connect login window.

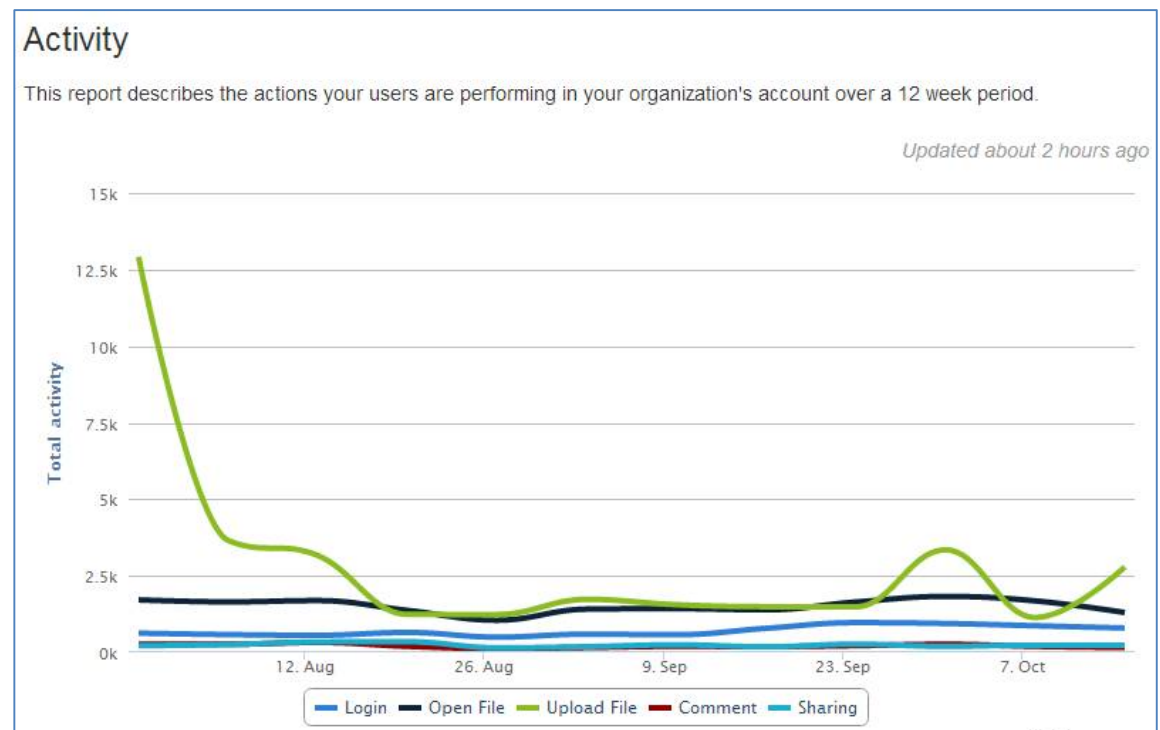
ANALYZING USAGE

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

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

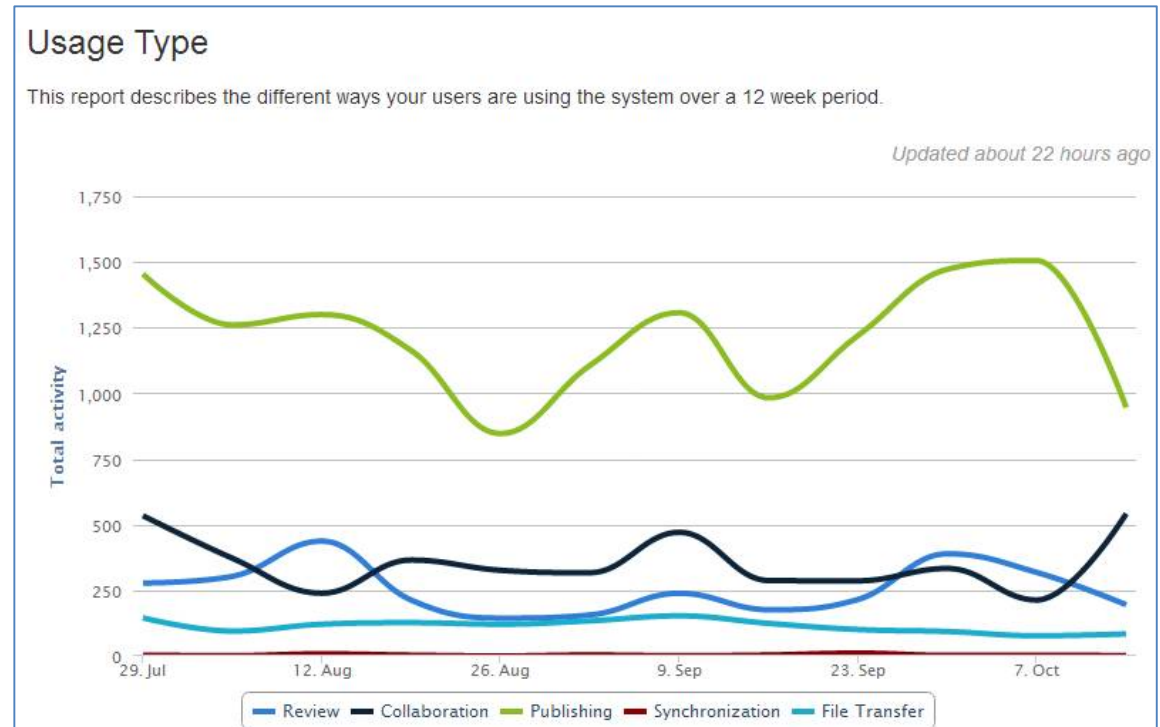
- Activity
- Usage Type
- Apps

Activity



The Activity report shows the types of activity users are performing in Connect 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:

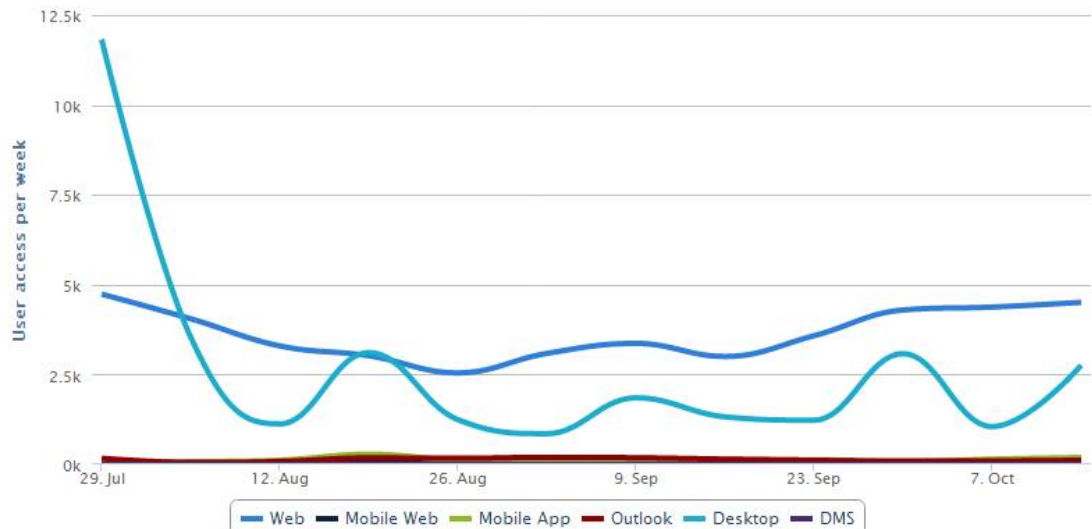
- Synchronization by downloads via apps: This indicates the users downloading the Connect for desktop and Connect for mobile apps and syncing files to their computer or mobile device to work remotely or offline.
- File transfer by folders sent: This indicates multiple or large file transfer with users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

Apps

Apps

This report describes the channels (Web, Workshare Desktop, Workshare Mobile, DMS and the Workshare Outlook integration) through which your users are accessing your organization's information over a 12 week period.

Updated about 22 hours ago



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

MANAGING USERS

Users are people in your network using one of your Workshare Connect 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

☒ **Users:** Members of your account. You may manage Users and their data.
 ☐ **Guests:** People who are not members of your account, but have been invited to share data by your users.


Show: Active users
Add User
Add Bulk Users

	First Name	Last Name	Email	Created On	Guests	Storage (MB)	Role	Compliance Admin	Status
	Archibald	Kebbi	archibald.kebbi@workshare.com	about a year ago	24	1950.76	admin		unvalidated
	Seana	Keenahan	seana.keenahan@workshare.com	7 months ago	0	55.64	user		active
	Phill	Kemp	phill.kemp@workshare.com	5 months ago	1	6707.21	user		active
	Tom	Lathouwers	tom.lathouwers@workshare.com	2 years ago	24	2032.54	admin	Yes	suspended
	Janet	Lau	janet.lau@workshare.com	10 months ago	3	73.62	user		active

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.

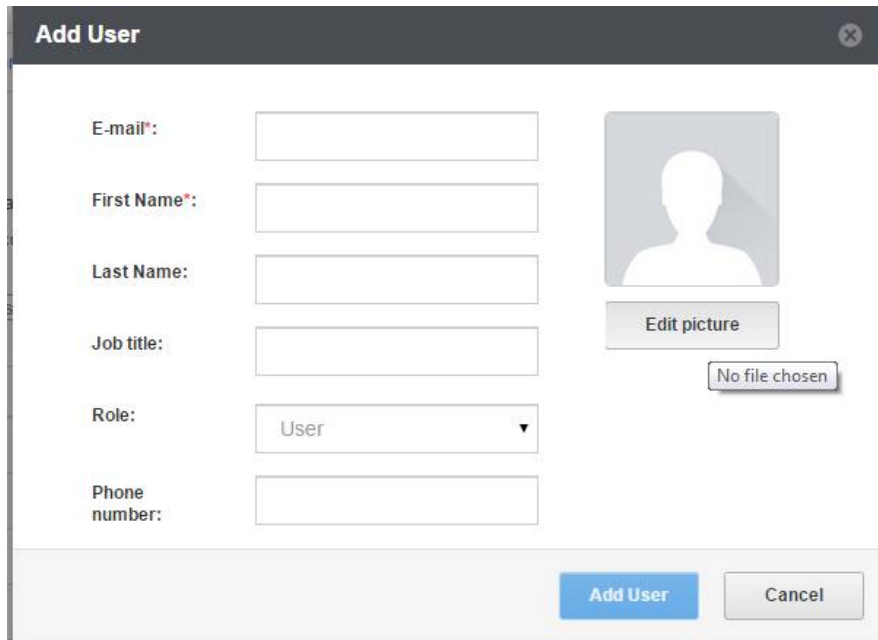
Click  to the left of a user to edit the details of that user or to suspend the user or disconnect devices the user may be using to access Connect.

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 Connect 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. Select **Add User**.



3. In the **E-mail** field, enter an email address for 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 Connect 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. Select **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	email address	first name	last name	job title	phone number
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

Choose File

No file chosen

Import


Cancel

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 Connect account.

Suspending Users

Suspending a user from your Workshare Connect account prevents the user from logging into Connect 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 Connect 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 Connect on all devices where they are currently logged in. Their Connect login credentials will no longer enable them to access Connect.

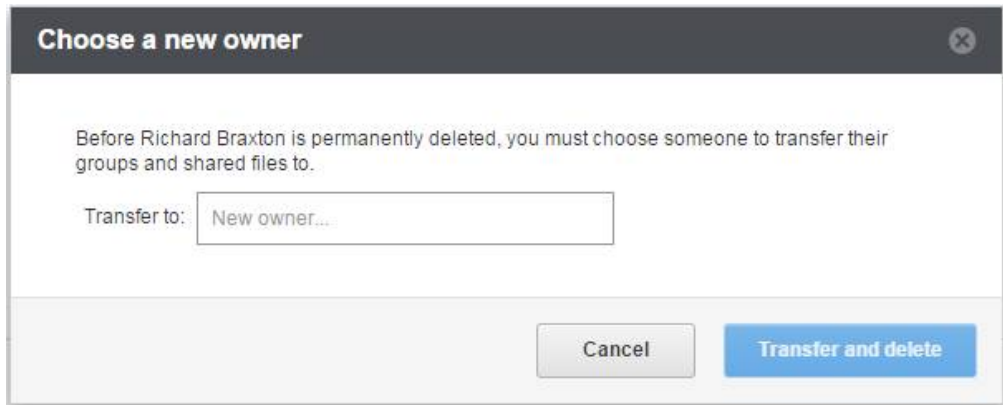
Deleting Users

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.

5. 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.



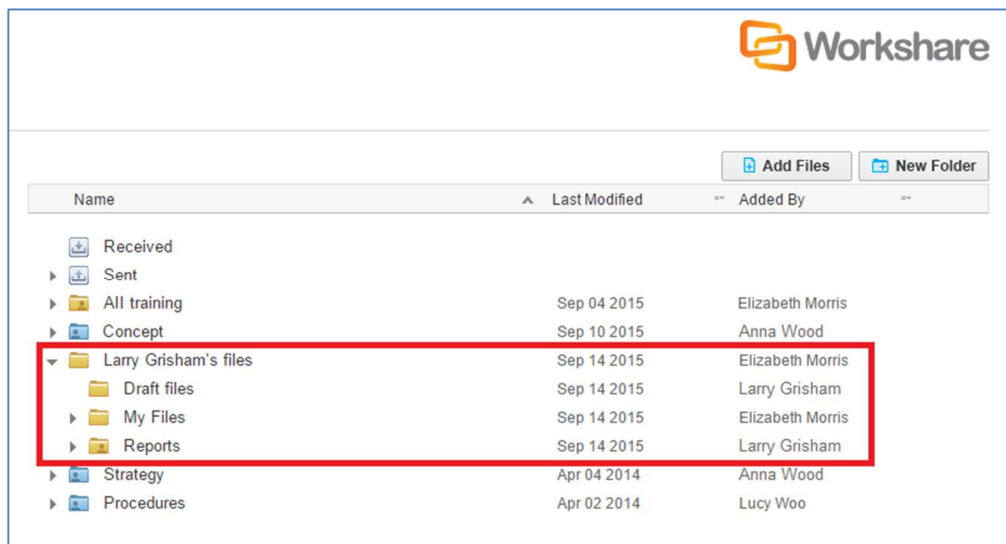
6. Enter the email address of the person who is to take ownership of the files.
7. Click **Transfer and delete**. All the files and folders and groups owned by the user are transferred to the specified new owner and the user is permanently deleted.

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 Files & Folders (Classic) are moved into the new owner's Files & Folders (Classic) area and stored in a new folder called "[UserName]'s files".



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 the files and folders the deleted user owned in My Files are moved into the new owner's Files & Folder (Classic) area and stored in a subfolder of "[UserName]'s files" called "My Files".

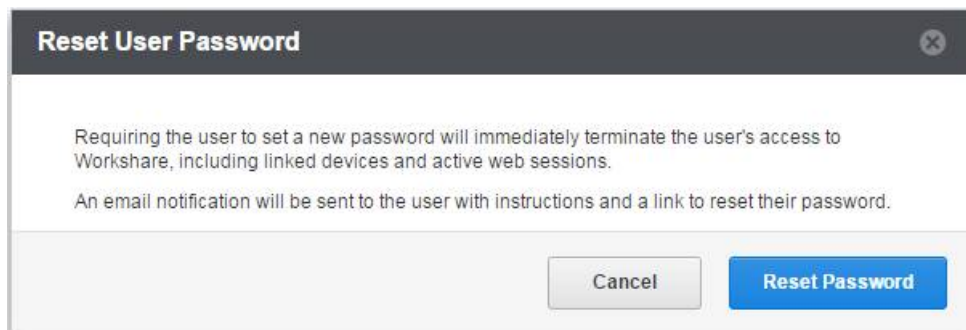
All of the deleted user's groups will be moved to the new owner's Groups area.

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 Connect 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 Connect on that device. When unlinking a device running Connect for desktop, you can also ensure that all Connect 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 Connect web application.

After being logged out, the user can log back in immediately using their Connect 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	
 LN1-HELENS-05	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** next to the device you want to unlink.

Unlink Device

You are about to unlink iPhone App from Carlos Silva'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.

☒ Carlos Silva 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 Connect 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. Connect 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** next to the browser session you want to end. The user is logged out of Connect and their browser displays the Connect login window. If there are several browser sessions running, you can click **End all Sessions** to log the user out of all browser sessions.

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 Connect data.

To remove a guest:

1. Select the **User Management** tab.
2. 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
Barrie	TYGER	barrie@tyger.com		2 years ago remove access
Jonathan	c	jonathan.cecil@gmail.com	Jonathan Cecil	8 months ago remove access
Mark	Hadfield	mark.hadfield@nscaled.com		2 years ago remove access
Ryan	Soosayraj	ryanjude@gmail.com	Ryan Soosayraj	8 months ago remove access
Christine	Gmail Account	christinedavies@gmail.com	Christine Davies	11 months ago remove access
John	Hunter	John.Hunter@echr.coe.int		2 years ago remove access
Test	Test	test@test.com		8 months ago remove access
Dan	- personal acct	dvonweihe@gmail.com		2 years ago remove access
Chris	Thelen	chris.thelen@chamberstravel.com	Dan Von Weihe	5 days ago remove access

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 the “Invited By” will show the latest user to invite the guest.

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

Remove Guest

Are you sure that you want to remove the given guest user?

Close

Confirm

- Click **Confirm**. The selected guest is removed from ALL folders where they are members and can no longer access content in Connect.

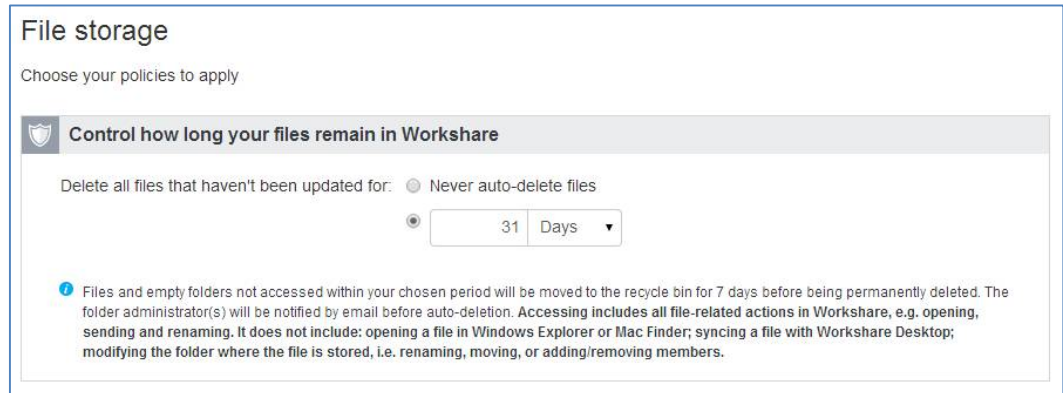
Note: When a user removes a guest by removing a member from a folder, the guest is removed from just that folder– the guest may still be in this list if the guest was invited by the user to other folders or by other users to other folders.

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.

To set an auto-delete policy:

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



- 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.

- Select  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
 - Move folder
 - Create/upload new
 - Add new version
 - Download (manual)
 - Rename 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

***Note:** The functionality of the **Reports** tab is available for User & Data Control accounts only.*

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

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 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 Connect) 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 Connect.
 - **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 an Compliance Officer user

File Access Reports

Due to the sensitivity of the data in a File Access 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 Connect by creating a File Access 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 access** 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 access** 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 User & Data Control accounts only.

Integrations

If you are a User & Data Control account administrator, you can download the Microsoft SharePoint, Autonomy iManage and OpenText eDocs integrations from the **Services** tab. These integrations enable users to upload files and folders to Workshare Connect from within OpenText eDocs, Autonomy iManage or Microsoft SharePoint. 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 are a User & Data Control account administrator, you can configure Single Sign-On to provide a secure, convenient and faster way for signing in, enabling users to log in to Connect 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 Integration Administrator's Guide available from the Workshare knowledge base.

Workshare Connect API

If you are a User & Data Control account administrator, you can access the Workshare Connect API.

The Workshare Connect 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 Connect 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.



Account Settings	
Company Name:	Workshare Ltd
Owner:	Simon Williams
Subscription Details	
Subscription type:	User and Data Control
Date created:	3 years ago
Number of licenses:	200
Invited users:	776
Used licenses:	214
Active users:	214

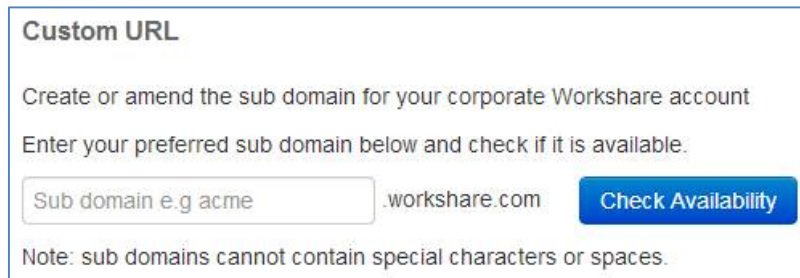
You can see the same account and subscription information as displayed in the top banner of the Admin Console.

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>.

To create a custom URL:

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



Custom URL

Create or amend the sub domain for your corporate Workshare account

Enter your preferred sub domain below and check if it is available.

Sub domain e.g acme .workshare.com **Check Availability**

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.

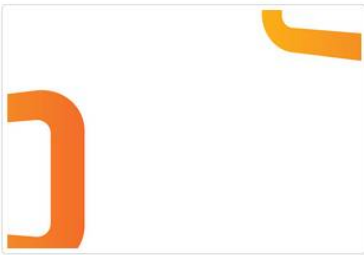
To personalize Workshare:

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

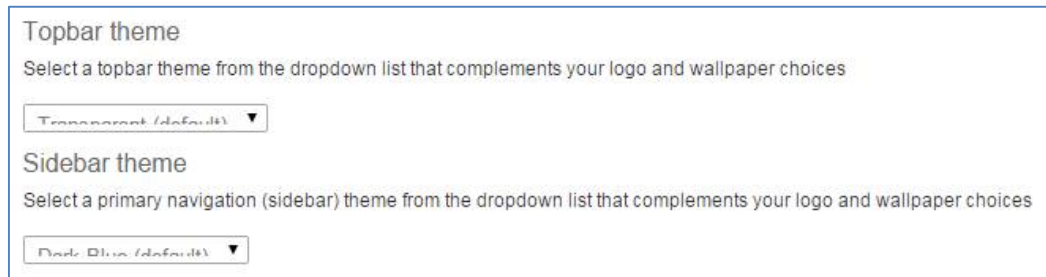
Select a logo from your computer



Max: 200px wide by 120px high at 72dpi

Choose File

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



Topbar theme
Select a topbar theme from the dropdown list that complements your logo and wallpaper choices

Transparent (default) ▼

Sidebar theme
Select a primary navigation (sidebar) theme from the dropdown list that complements your logo and wallpaper choices

Dark Blue (default) ▼

Configuring Activation and User Engagement Emails

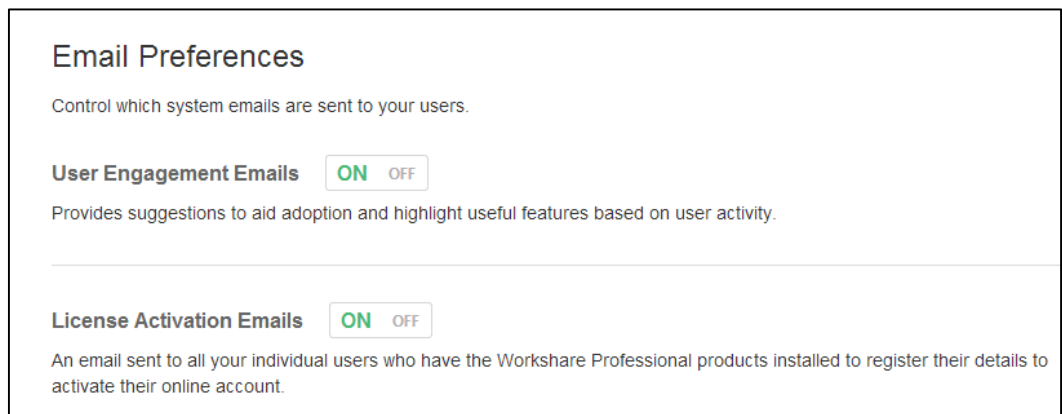
When you install Workshare Professional/Protect 8 (and above) across your organization, your users will be registered against your Workshare Connect account. A validation email is sent to each user that has the Professional/Protect client installed on their desktop. Only one automatic email is sent and 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 Connect 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 Connect 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 Professional 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 Connect but it will remain “unvalidated”. A user will usually need a Connect 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 Connect. 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**.

THE DOWNLOAD CENTRE

The Download Center tab provides access to and information about the applications available with your Workshare Connect account. These include:

- Workshare Connect for Desktop (for all Workshare accounts)
- Workshare Connect for Mobile (for all Workshare accounts)
- Workshare Professional 9 (Workshare accounts can download a free 30 day trial)
- Workshare Protect 9 (Workshare accounts can download a free 30 day trial)
- Workshare Compare 9 (Workshare accounts can download a free 30 day trial)