

Workshare iManage Integration

User Guide

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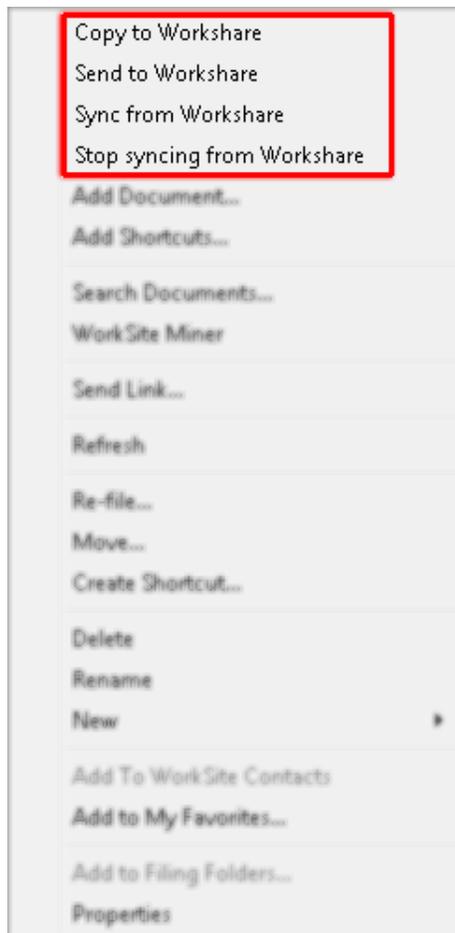
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How does iManage Integrate with Workshare?

The iManage integration (file sharing & DMS mobility) gives you the ability to share your iManage content to Workshare. This provides you with:

- **DMS mobility:** You can access your iManage content securely while out of the office or on other devices, giving you immediate and secure access to your important everyday files. If you sync your content, a record of all activity is logged in iManage so that full control of content is kept at all times.
- **File sharing:** You can share your iManage content securely with people who may not work for the same firm which enables smoother collaboration and enhances productivity. Full security and control is maintained and synchronization and sharing can be stopped as soon as a case is over.

The integration adds the following Workshare options to your right-click menu in iManage:



Copy to Workshare: Copy an entire workspace with all its folders and files to Workshare. No synchronization between iManage and Workshare occurs.

Send to Workshare: Upload iManage folders and files to Workshare and keep synchronized. This means if you add further files to the folder in iManage or add a version to a file in iManage, you will automatically be asked if you want to send the new version or new file to Workshare.

Sync from Workshare: Update iManage with any changes made in synchronized folders and files in Workshare. This means if you make changes to a synchronized folder or file in Workshare, such as adding files or versions, these changes will not be reflected in iManage until you synchronize.

Stop syncing from Workshare: Stop any synchronizing of a file or folder between iManage and Workshare. You can select to remove the folder and files completely from Workshare. In this way, once you have finished a case or a project, you can remove all associated files from Workshare and ensure the updated copies are only in iManage.

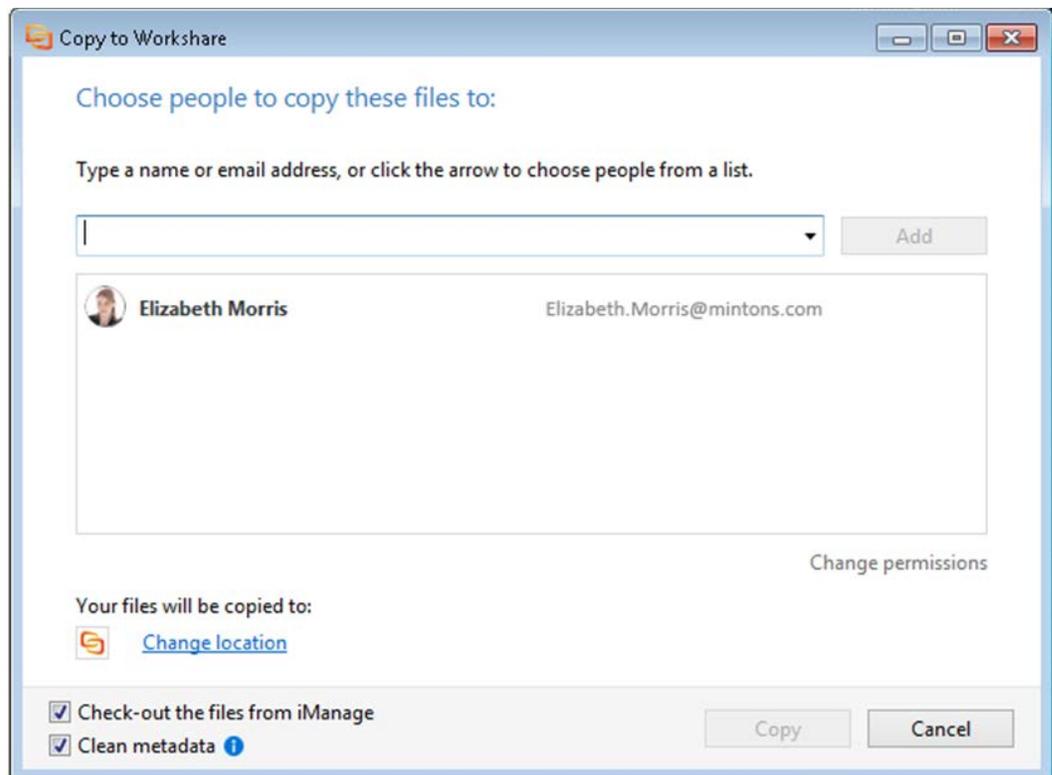
Copy to Workshare

Copy to Workshare is a one-way upload for files, folders and workspaces. It enables you to quickly share large volumes of content on Workshare. There is no automatic synchronization set up between iManage and Workshare.

This is particularly useful when you want to share an entire matter (all the emails, documents, etc. that relate to a case) with clients or other lawyers. When there is no expectation that the client will alter the content, there is no requirement that the content will be automatically synchronized back to iManage.

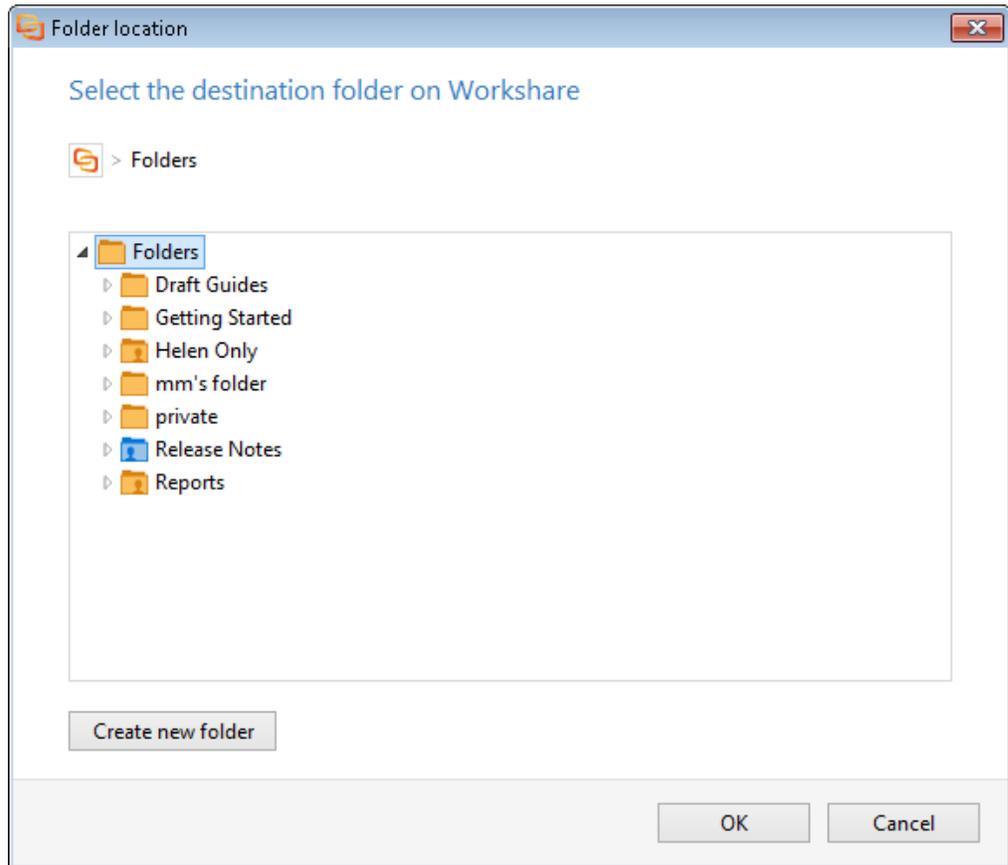
To copy files to Workshare:

1. In iManage, right-click a workspace (or folder or file) and select **Copy to Workshare**.



Note: The **Copy** button will remain disabled and you will not be able to add people to share the content with until you specify a location.

2. You must first specify a location for your content. Click **Change location**.



Note: If the **Create new folder** button isn't enabled, click in the folder tree.

3. Browse to an existing Workshare folder or create a new Workshare folder. If that folder already has other members, they'll have access to the content you're adding now. Similarly, any members you add now will have access to the content already in the existing folder.

Note: You can only select folders to which you have permission.

4. Click **OK**. If the selected folder is shared already, the members will now be displayed in the *Copy to Workshare* dialog.
5. Specify additional members for the Workshare folder – this means who will have access to the files you are uploading to Workshare. By default, your own email address is listed. If you are just uploading files to Workshare so you can access them yourself, for example, from your iPad when travelling, there is no need to add further email addresses.

If you want to share the files with other people, enter their name or email address and click **Add**.

- The level of access members have to folders in Workshare is controlled by the folder's permissions. If you want to change the permissions for the Workshare folder, click **Change permissions**.

- Adjust any of the following settings as required and click **OK**.

Notify owner when a member first accessed the folder

You'll receive an email when the people you've invited (the folder members) first access the folder.

Members can add people

Folder members can invite more people to share the folder.

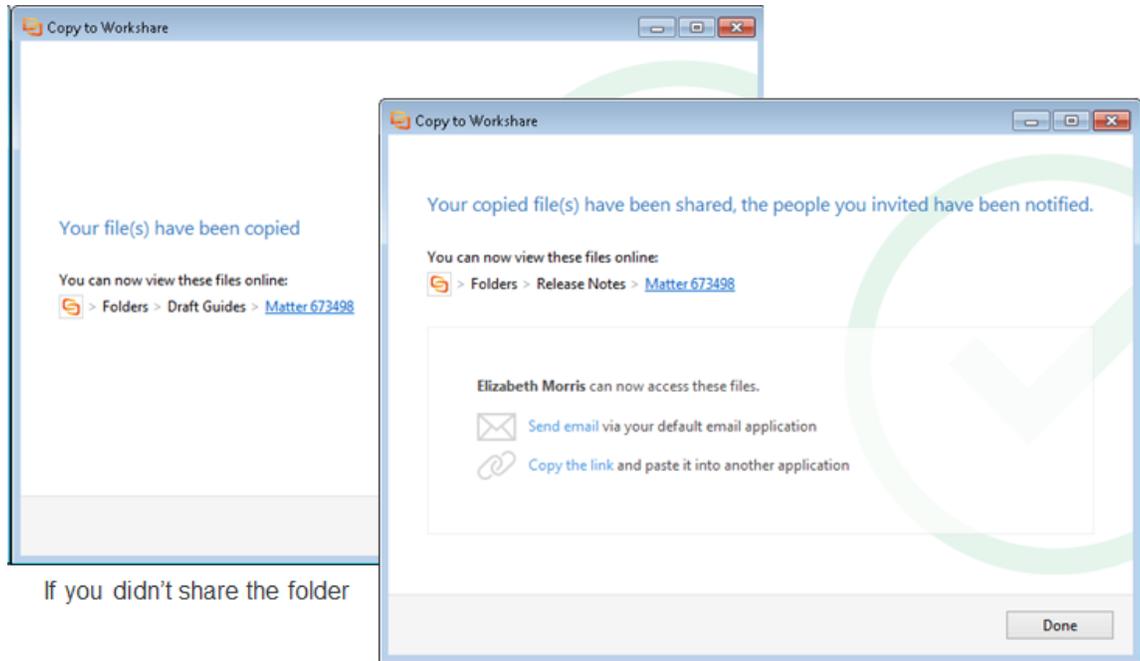
Members need to login to view the folder	Folder members must be registered Workshare users and must sign in to Workshare to access the folder.
Expiry Date	After this date, folder members won't be able to access the folder anymore.
Members can download files	Folder members can download the files from the folder.
Members can add and remove files	Folder members can add files to or remove files from the folder.
Members can add new versions of files	Folder members can add versions to the files within the folder.

Note: *If you choose to share a file to an existing Workshare folder, the permissions you change now will be applied to that Workshare folder and all the content in it.*

8. Click **OK**.
9. Decide whether to check out the files in the workspace you're uploading. By default, files you upload to Workshare are checked out of iManage until you check them back in. This means other iManage users cannot edit them. If you do not want to check them out, deselect the **Check-out the files from iManage** checkbox in the *Copy to Workshare* dialog.
10. By default, your files are cleaned of metadata when they are uploaded. To leave the metadata in your files, deselect the **Clean metadata** checkbox.

Note: *The **Clean metadata** checkbox only appears if you have the **File & Metadata Security (Protect)** component of Workshare installed and licensed. Metadata is cleaned according to the settings in the Workshare Configuration Manager (**Protect > Interactive Protect** category).*

11. Click **Copy**. Your selected workspace with all its folders and files is uploaded to Workshare. The folder structure beneath the workspace in iManage is replicated in the Workshare folder. You will see one of the following:



12. Proceed in any of the following ways:

- Click the hyperlink to the Workshare folder to open the location of your uploaded workspace in Workshare.
- When sharing, click **Send an email** to notify folder members that you have shared content with them. An email window opens with the folder members in the **To** field and a link to the shared Workshare folder in the body of the email. Simply enter a subject for the email and click **Send**. The folder members receive a personal email from you.
- When sharing, click **Copy the link** to copy the link to the Workshare folder and paste it into another application, such as a chat message or email.
- Click **Done** to close the window.

You can copy individual folders or files from iManage to Workshare following the same procedure as described above.

Synchronising

When you expect your iManage content to change, it is useful to synchronize it when uploading to Workshare.

If you use the **Send to Workshare** functionality, to upload iManage folders (and files) to Workshare, they are kept synchronized. This means if you add further files to the folder in iManage or add a version to a file in iManage, you will automatically be asked if you want to send the new version or new file to Workshare.

When changes are made to a synchronized folder (or file) in Workshare, such as adding files or versions, you can use **Sync from Workshare** to update iManage with the changes.

At any time, you can **stop synchronizing** between iManage and Workshare. When you stop, you can select to remove the folder and files completely from Workshare. In this way, once you have finished a case or a project, you can remove all associated files from Workshare and ensure the updated copies are only in iManage.

Uploading folders from iManage to Workshare

When sending folders from iManage to Workshare, your iManage content will be stored in **Folders** in Workshare and you can specify exactly where it will be stored and who it will be shared with. You can send a folder containing multiple files or you can send individual files within a folder. By default, the storage location in Workshare mirrors your iManage folder hierarchy, so for example, if you selected an iManage folder called “Evidence” in “Matter 2 – Smith v Jones”, by default its location in Workshare would be: **Folders > Matter 2 – Smith v Jones > Evidence**.

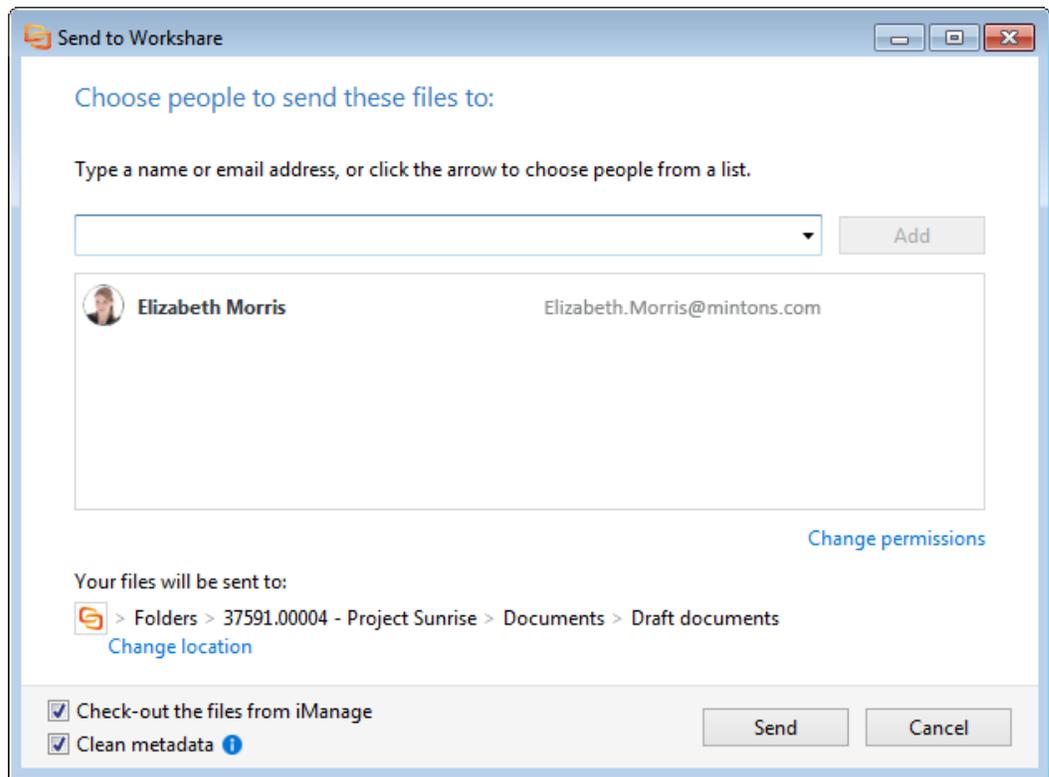
You can also clean metadata from your iManage files as you upload them to Workshare if you have the **File & Metadata Security** (Protect) component of Workshare installed and licensed.

To send folders to Workshare:

1. Right-click a folder in iManage and select **Send to Workshare**. Workshare verifies that there is connectivity to my.workshare.com, performs other access checks and the *Send to Workshare* dialog is displayed.

Note: For example, Workshare ensures files are not checked out to other users or locked in Word or without the correct permission.

Note: If you are not currently signed in to Workshare, the Workshare login page is displayed and you must sign in.



Tip! If the folder (or a file in it) has been sent to Workshare before, a different dialog is displayed. Refer to *Managing synchronized folders*.

2. Specify the members for the Workshare folder – this means who will have access to the files you are uploading to Workshare. By default, your own email address is listed. If you are just uploading files to Workshare so you can access them yourself, for example, from your iPad when travelling, there is no need to add further email addresses. If you want to share the files with other people, enter their name or email address and click **Add**.



Note: The Workshare icon to the right of the person indicates they are Workshare users.

3. The level of access members have to folders in Workshare is controlled by the folder's permissions. If you want to change the permissions for the Workshare folder, click **Change permissions**.

4. Adjust any of the following settings as required and click **OK**.

Notify owner when a member first accessed the folder

You'll receive an email when the people you've invited (the folder members) first access the folder

Members can add people

Folder members can invite more people to share the folder

Members need to login to view the folder

Folder members must be registered Workshare users and must sign in to Workshare to access the folder

Expiry Date

After this date, folder members won't be able to access the folder anymore

Members can download files

Folder members can download the files from the folder

Members can add and remove files

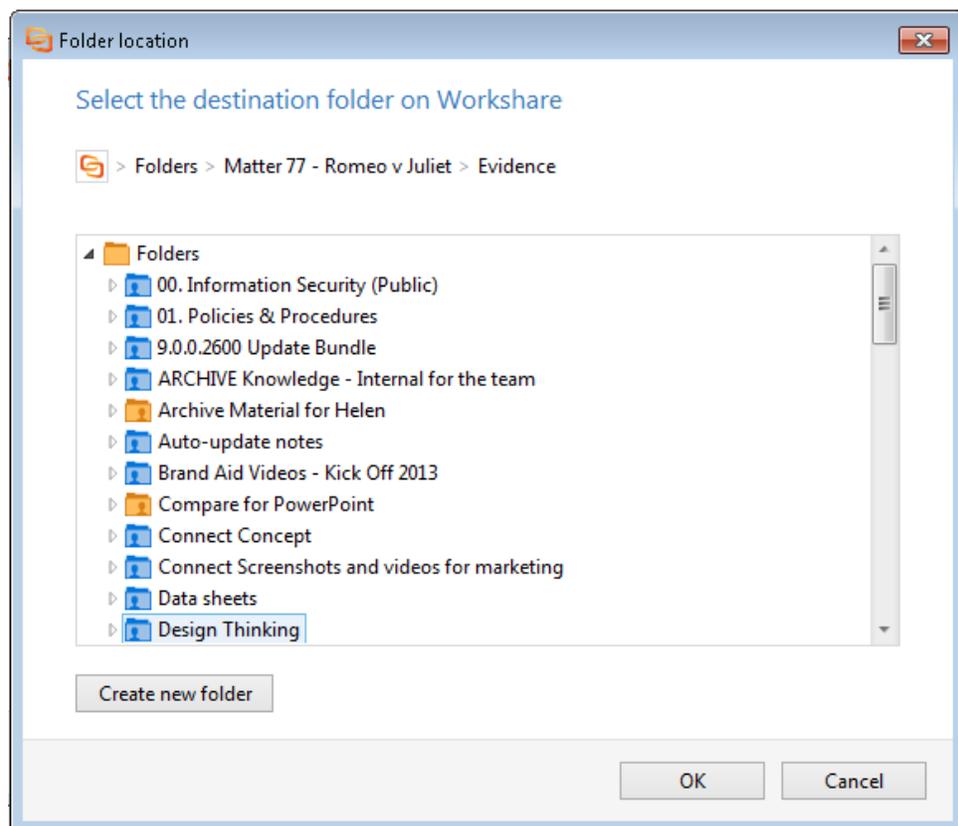
Folder members can add files to or remove files from the folder

Members can add new versions of files

Folder members can add versions to the files within the folder

Note: If you choose to share a file to an existing Workshare folder, the permissions you change now will be applied to that Workshare folder and all the content in it.

5. Click **OK**.
6. Specify the location for your uploaded folder. By default, the folder will go into a new folder in **Folders** with the same name as the iManage folder. So for example, if you selected an iManage folder called "Evidence" in "Matter 2 – Smith v Jones", by default its location in Workshare would be: **Folders > Matter 2 – Smith v Jones > Evidence**. To change the location, click **Change location**.



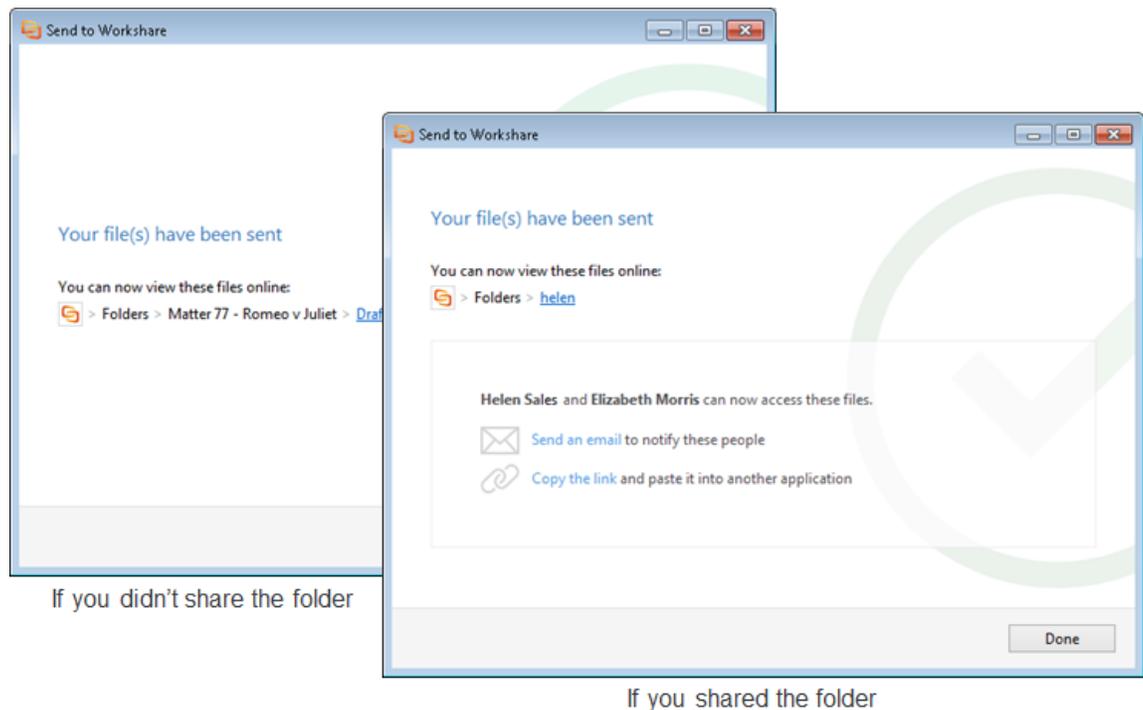
7. Browse to an existing Workshare folder or create a new Workshare folder. If that folder already has other members, they'll have access to the content you're adding now. Similarly, any members you add now will have access to the content already in the existing folder.

Note: You can only select folders to which you have permission.

8. **Click OK.**
9. Decide whether to check out the files in the folder you're uploading. By default, files you upload to Workshare are checked out of iManage until you check them back in. This means other iManage users cannot edit them. If you do not want to check them out, deselect the **Check-out the files from iManage** checkbox in the Send to Workshare dialog.
10. By default, your files are cleaned of metadata when they are uploaded. To leave the metadata in your files, deselect the **Clean metadata** checkbox.

Note: The **Clean metadata** checkbox only appears if you have the **File & Metadata Security (Protect)** component of Workshare installed and licensed. Metadata is cleaned according to the settings in the Workshare Configuration Manager (**Protect > Interactive Protect** category).

11. Click **Send**. Your selected folder with its files is uploaded to Workshare and you will see one of the following.



12. Proceed in any of the following ways:

- Click the hyperlink to the Workshare folder to open the folder in Workshare.
- When sharing, click **Send an email** to notify folder members that you have shared files with them. An email window opens with the folder members in the **To** field and a link to the shared Workshare folder in the body of the email. Simply enter a subject for the email and click **Send**. The folder members receive a personal email from you.
- When sharing, click **Copy the link** to copy the link to the Workshare folder and paste it into another application, such as a chat message or email.
- Click **Done** to close the window.

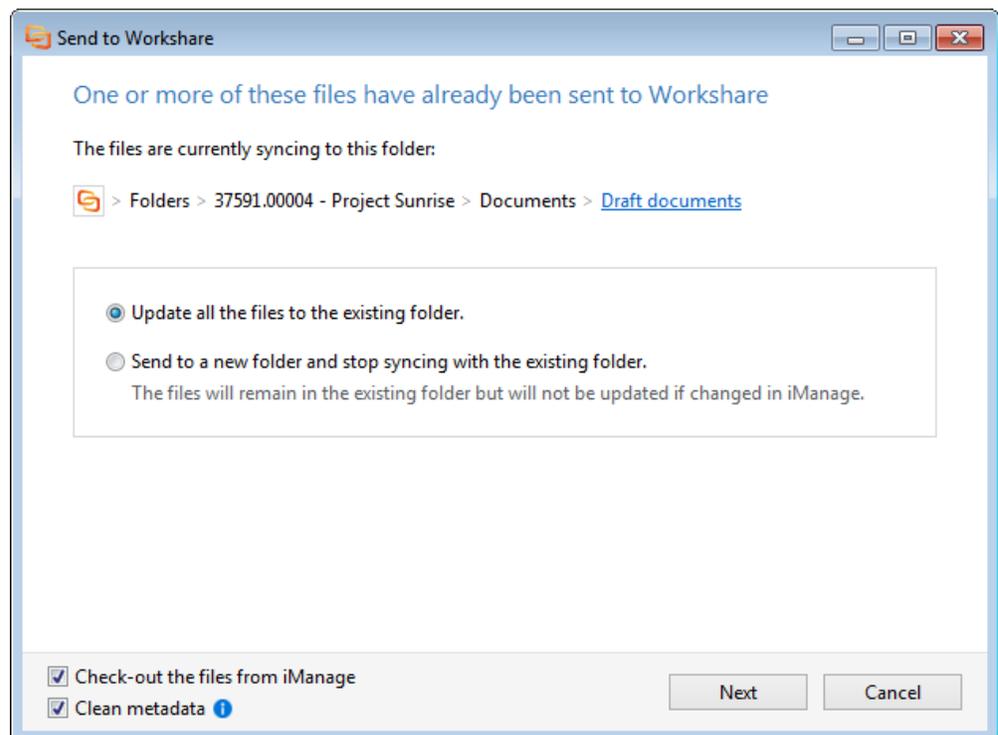
You can also send individual files from iManage to Workshare following the same procedure as described above.

Managing synchronized folders

After you have uploaded an iManage folder to Workshare for the first time, Workshare will recognize any future attempts to upload the same folder or any files in that folder. When adding more files to your iManage folder, you will be prompted to upload these files to the initial target location in Workshare or you can upload them to a new folder in Workshare and stop syncing the original files you had already sent.

To upload further files:

1. Simply, add a file or new version to a folder previously sent to Workshare. The following dialog is displayed:



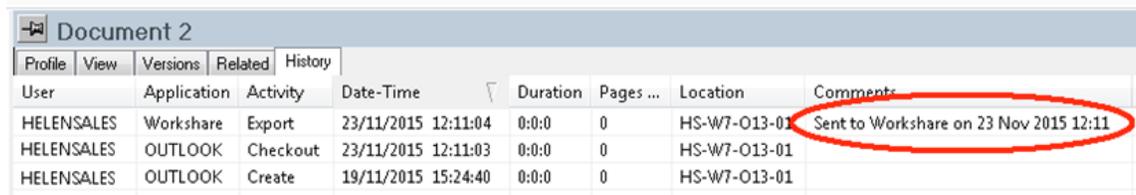
Note: This dialog is also displayed automatically when you right-click a folder in iManage and select **Send to Workshare** where the folder (or a file in it) has been sent to Workshare before.

2. Select how to upload the file:
 - **Update all the files to the existing folder:** The file will be added to the same Workshare folder that the iManage folder is connected with. Anyone who has access to the Workshare folder will now also have access to the new document. Click **Next** and the new files are sent to the Workshare folder.
 - **Send to a new folder and stop syncing with the existing folder:** Only the file you've just added to iManage will be sent to a new location in Workshare. Any other files in the iManage folder will no longer sync with Workshare. Click **Next** and specify your target folder in Workshare and folder members, as described in *Uploading Folders from iManage to Workshare*.
3. Decide whether to check out the file you're uploading. By default, files you upload to Workshare are checked out of iManage until you check them back in. This means other iManage users cannot edit them. If you do not want to check the file out, deselect the **Check-out the files from iManage** checkbox.
4. By default, files are cleaned of metadata when they are uploaded. To leave the metadata in your file, deselect the **Clean metadata** checkbox.

Note: The **Clean metadata** checkbox only appears if you have the **File & Metadata Security (Protect)** component of Workshare installed and licensed. Metadata is cleaned according to the settings in the Workshare Configuration Manager (**Protect > Interactive Protect** category).

What do I see in iManage?

In order to see if a folder or file has been uploaded to Workshare, look at the **History** tab in iManage.



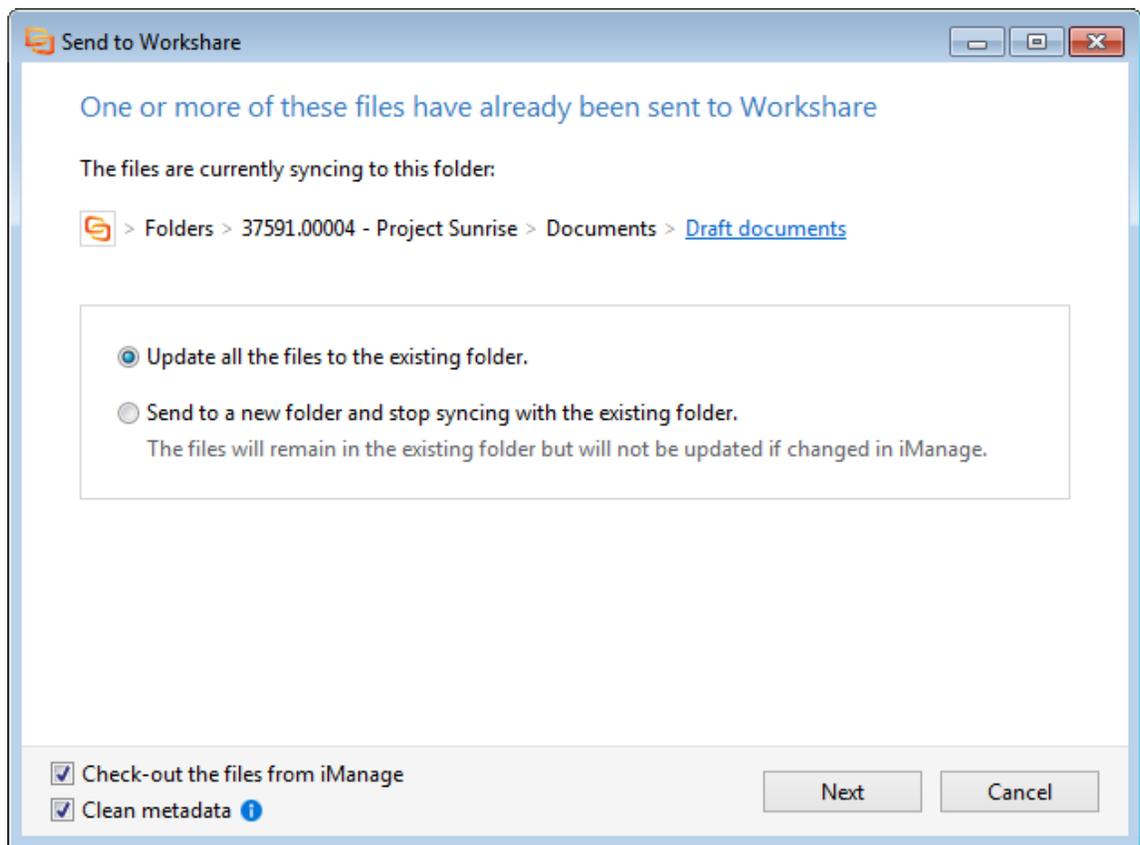
Document 2									
Profile	View	Versions	Related	History					
User	Application	Activity	Date-Time	Duration	Pages ...	Location	Comments		
HELENSALES	Workshare	Export	23/11/2015 12:11:04	0:0:0	0	HS-W7-013-01	Sent to Workshare on 23 Nov 2015 12:11		
HELENSALES	OUTLOOK	Checkout	23/11/2015 12:11:03	0:0:0	0	HS-W7-013-01			
HELENSALES	OUTLOOK	Create	19/11/2015 15:24:40	0:0:0	0	HS-W7-013-01			

The **Comments** field in the History tab indicates when a folder has been copied or sent to Workshare. A "Checkout" and "Export" is shown and if you didn't want the files to be checked out, a "Release" is also shown.

Note: A red tick next to a file in iManage  indicates it has been checked out. You may have to refresh the view manually in order for the red tick to display after checking a file out when copying it or sending it to Workshare.

Synchronize folders from Workshare to iManage

After you've uploaded a folder from iManage to Workshare, it remains linked or synchronized to Workshare until you stop synchronizing it. This means if you add further files to the folder in iManage or add a version to a file in iManage, you will automatically be asked if you want to send the new version or new file to Workshare.

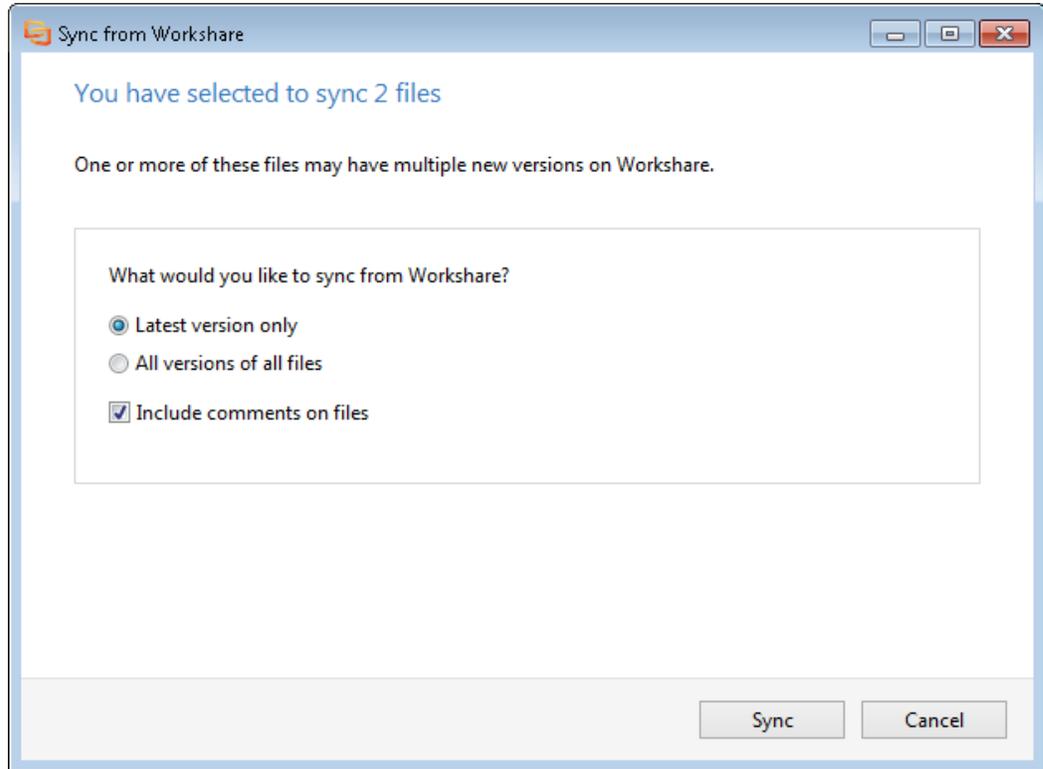


If you make changes to the folder in Workshare, such as adding files or versions, these changes will not be reflected in iManage until you synchronize. You will get an email notification from Workshare alerting you that a folder member has made changes to the folder.

You can synchronize a folder back to iManage or specific files within a folder.

To sync folders from Workshare to iManage:

1. Right-click the folder and click **Sync from Workshare**. The *Sync from Workshare* dialog is displayed.



Note: When syncing folders, Workshare detects how many new files or changed files there are in Workshare and informs you at the top of the dialog.

2. Select which version of a file to sync.
 - **Latest version only:** Only the most recent version of the file will be synced to iManage. For example, if you uploaded version 1 of a document from iManage to Workshare and folder member A added version 2 in Workshare and folder member B added version 3 in Workshare. If you select this option only version 3 will be synced to iManage so iManage will have version 1 and version 3 and Workshare will have versions 1, 2 and 3.
 - **All versions of all files:** All versions of the file will be added to iManage. Using the above example, selecting this option would mean versions 1, 2 and 3 would be synced to iManage.

Note: If you're synchronizing multiple files, the options you choose will be applied to all files.

3. Leave the **Include comments on files** checkbox selected to include a PDF document of all the comments made on the file in Workshare. This PDF document is downloaded to iManage and related to the original file.
4. Click **Sync**. When syncing a new file to iManage, you are prompted to profile it.

New Profile

Please choose the location and document properties

Description
/why SharePoint matters to lawyers

Location
Emails <Matter 77 - Romeo v Juliet>

Author
HELENSALES<Helen Sales>

Class

Custom1

Custom2

Comments

Other Properties

Type
WORDX <WORD 2007>

Custom3

Custom29

Custom30

Custom4

Operator
HELENSALES <Helen Sales>

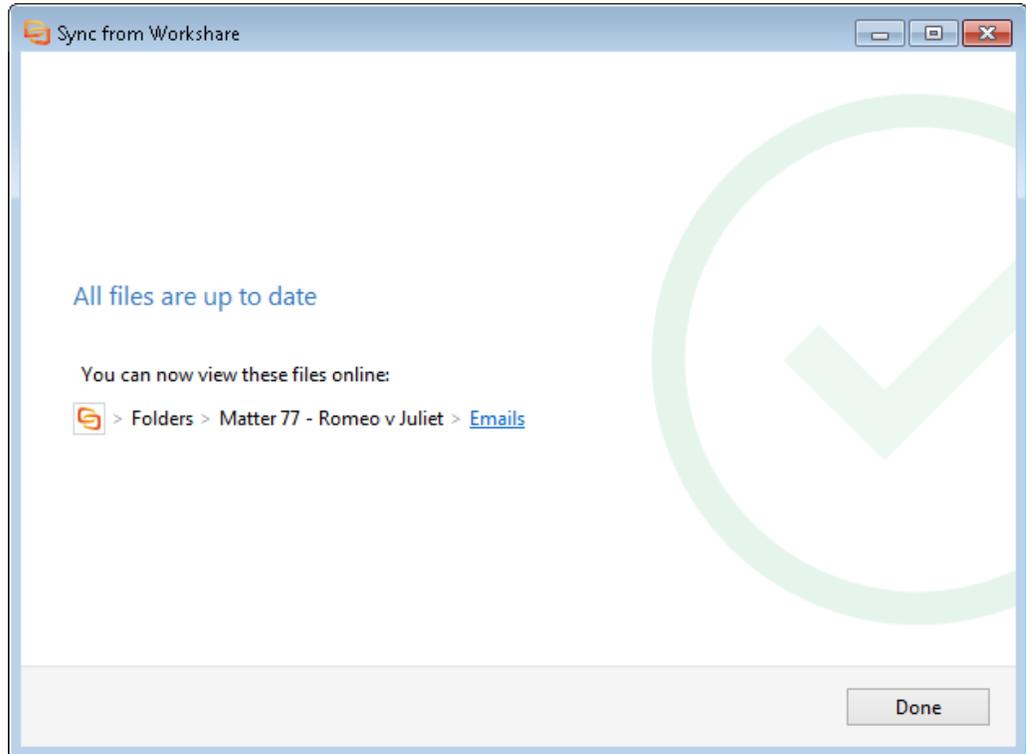
Security

Shared as:



5. Specify the profile information for the file and click **Save**. If further new files are being synced to Workshare, a New Profile dialog will display for each.
6. Complete profile information for additional files as necessary.

7. New files are synced from Workshare to your iManage folder and any new versions are added as versions to existing files in the folder. Once the synchronization is complete, the following is displayed.



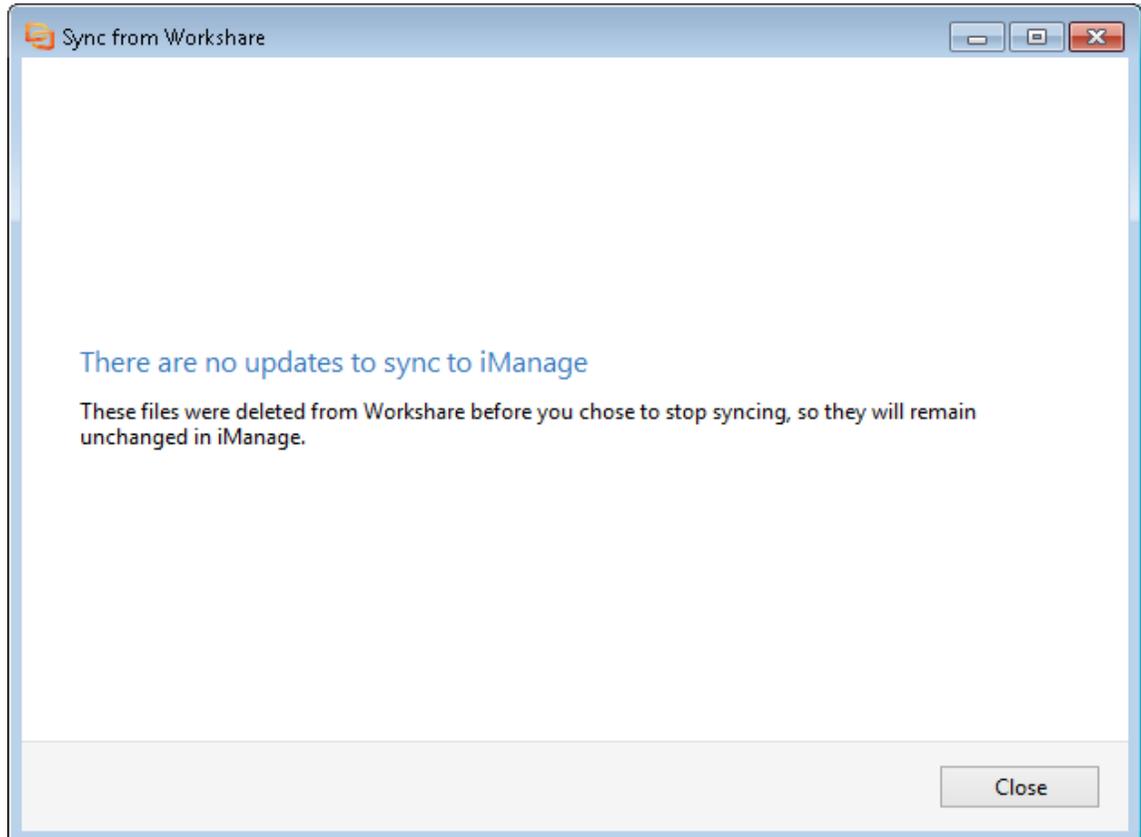
8. Click **Done**.

Note: Subfolders added in Workshare will only sync back to iManage if they have files in them.

Delete files in Workshare

If you upload an iManage folder to Workshare and files are deleted from the folder in Workshare, when you sync the folder back to iManage, the files are not deleted in iManage.

The following message is displayed when you click **Sync from Workshare** in iManage.



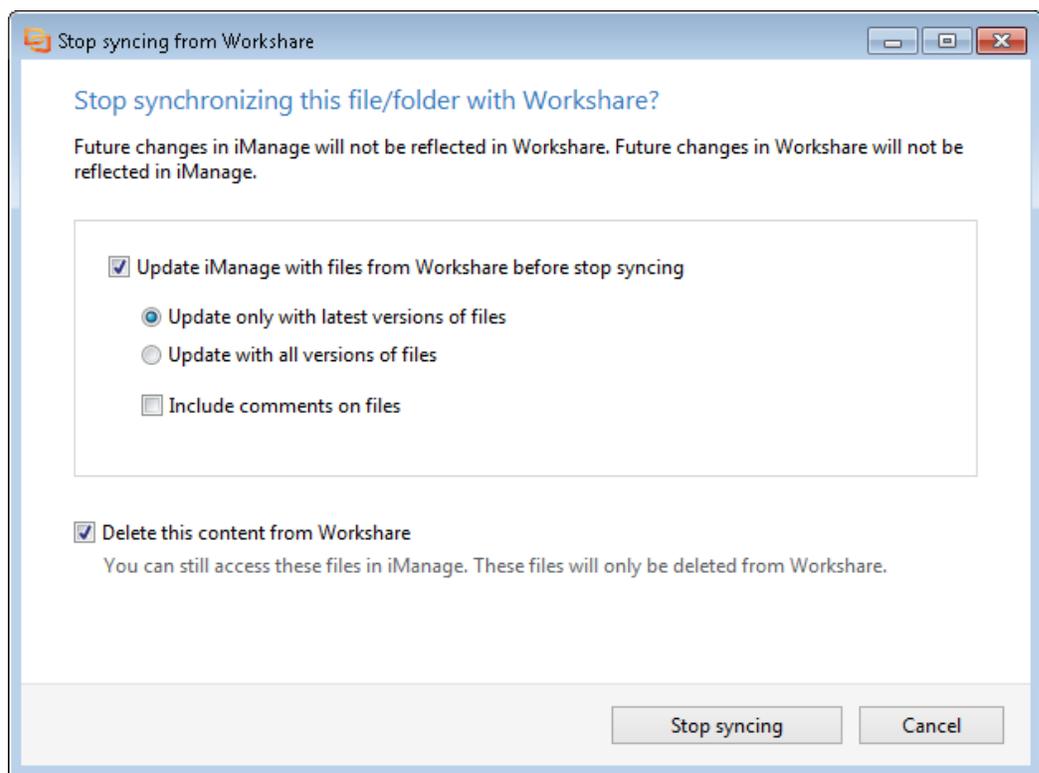
If you would like to delete the files from iManage, you must do so manually.

Stop synchronizing

When you're synchronizing an iManage folder with Workshare, you can stop the synchronization at any time and close any collaboration. You can select to remove the folder and files completely from Workshare. In this way, once you have finished a case or a project, you can remove all associated files from Workshare and ensure the updated copies are only in iManage.

To stop synchronizing:

1. In iManage, right-click the folder you want to stop synchronizing and select **Stop syncing from Workshare**. The Stop syncing from Workshare dialog is displayed.



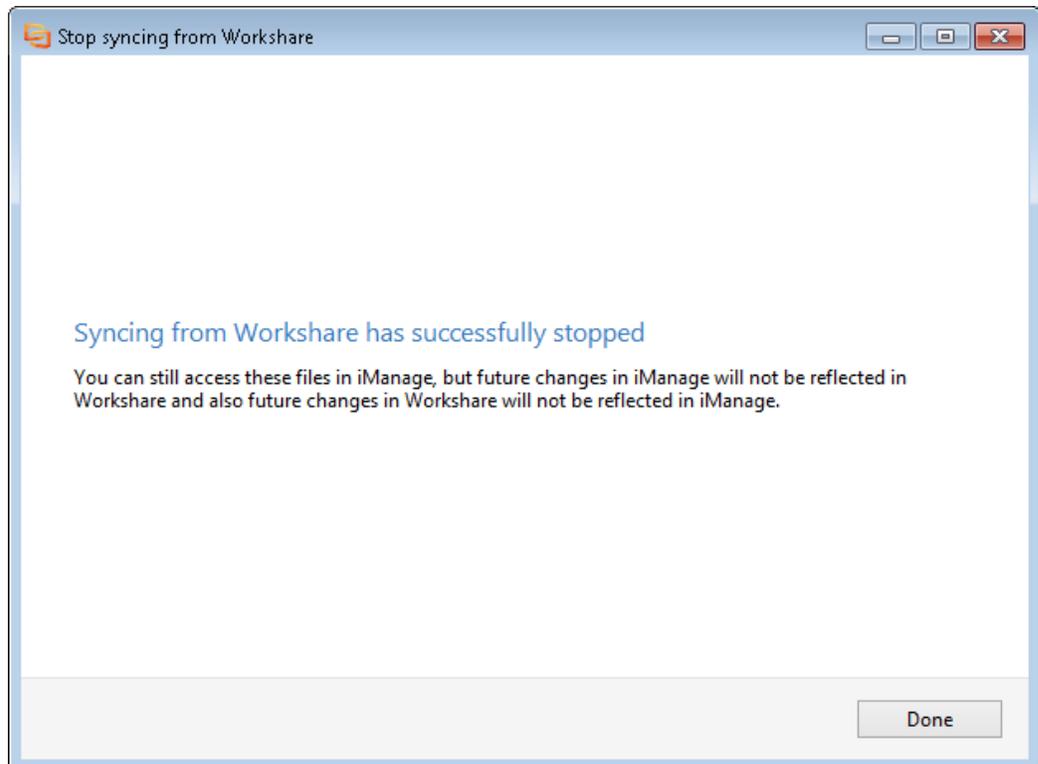
2. Leave the **Update iManage....** checkbox selected if you want to update iManage with the files from Workshare before you stop synchronization. Qualify this by selecting one of the following radio buttons:
 - **Update only with latest versions of files:** Only the most recent version of a file will be updated to iManage.
 - **Update with all versions of files:** All versions of a file will be updated to iManage.

Note: The options you choose will be applied to all files in the folder.

3. Select the **Include comments on files** checkbox to include a PDF document of all the comments made on a file in Workshare. This PDF document is downloaded to iManage and related to the original file. A PDF document with comments is created for each version of a file.

Note: To see when your files and folders were last synchronized, check the **History tab in iManage**.

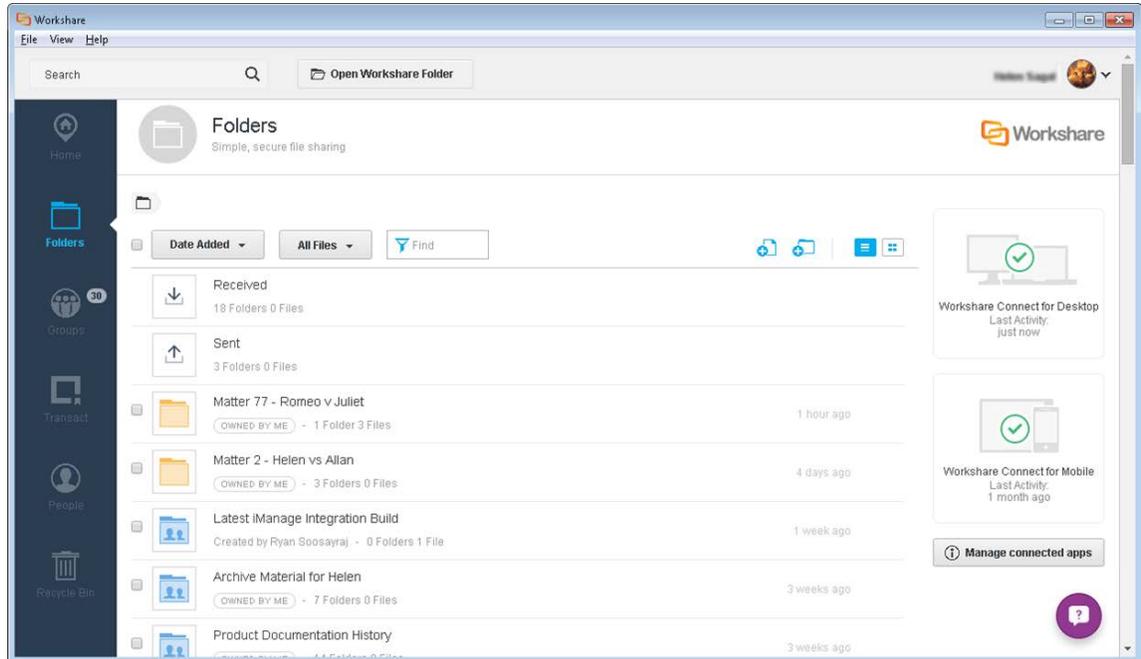
4. Select the **Delete this content from Workshare** checkbox if you'd like to delete the folder and the files in it from Workshare. Anyone sharing the folder on Workshare will no longer have access. To leave the folder and its files on Workshare, deselect the **Delete this content from Workshare** checkbox. Anyone sharing the folder on Workshare will continue to have access to it in its current state. Future changes to the folder and its files in iManage will not be reflected in Workshare and future changes in Workshare will not be reflected in iManage.
5. Click **Stop syncing**. Your iManage folder is no longer linked to Workshare and the following message is displayed.



Introducing the Workshare Desktop App

The iManage integration (file sharing and DMS mobility) includes the Workshare desktop app.

The Workshare desktop app provides a window into Workshare online from the desktop with access to all the online functionality. It enables the synchronization between your iManage content and Workshare.

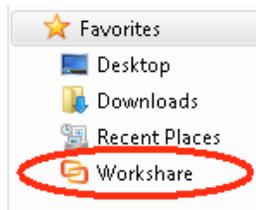


In addition, when “local sync” is included in your install, you can synchronize Workshare content to your local Workshare folder. This means you can have access to your Workshare content when offline and it will synchronize back to Workshare when you go online again.



Users can access the desktop app by clicking the shortcut icon on their desktop, or via the Start menu.

Users will also notice the following:



Workshare sync folder

The Workshare sync folder is added to Favourites. When local sync is included in the iManage integration, content from Workshare is synchronized to the local Workshare folder and users can work locally when offline. Once online again, the files in the local Workshare folder are synchronized back to Workshare.



System tray icon

The desktop app system tray icon provides access to a menu and notifies the user about sync status, such as when sync is in progress or all files are synced.

For a full description of Workshare, as well as the Workshare desktop app, refer to the Workshare knowledge base.

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