

Workshare iManage Integration File Sharing & DMS Mobility Getting Started Guide

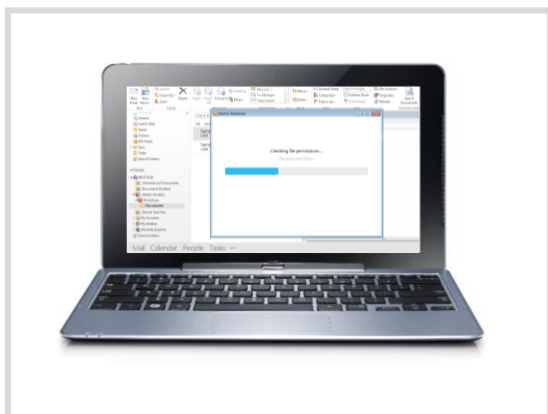
Work's about to get smarter

We have one goal – to give you a simpler, faster way to work on documents. We help you work outside the office by providing you with a secure space where you can connect to the documents you care about, the devices you use and the people you work with.

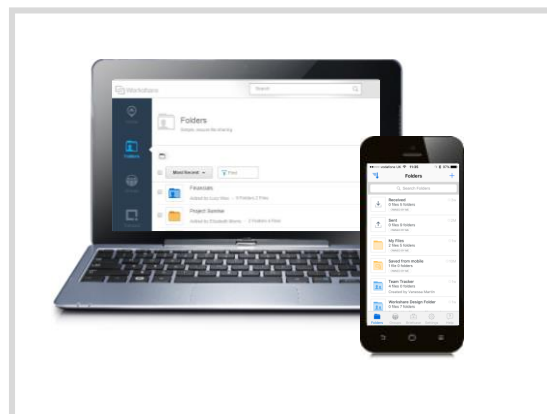
↑ Copy or ↓ Sync

👤 Access

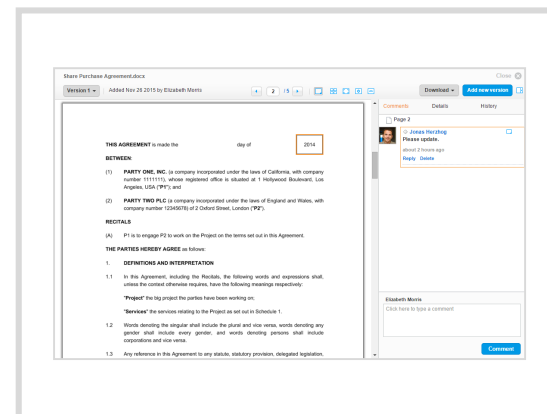
💬 Share



Work wherever you want by simply adding your iManage documents to Workshare.



Documents in Workshare are accessible online, on your desktop and on your mobile.

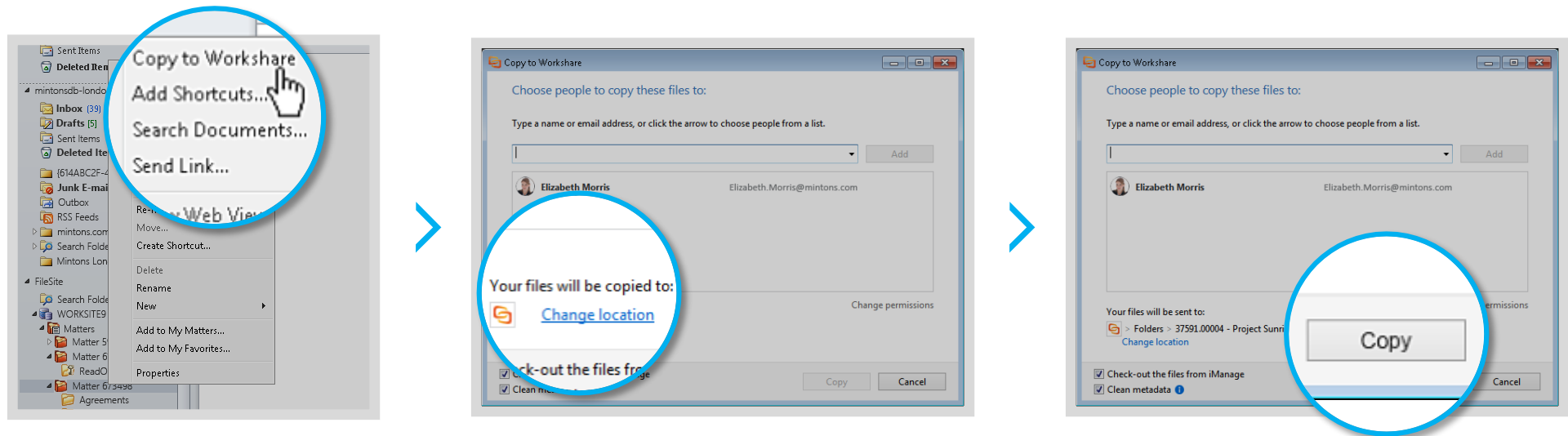


When you're ready to work with others, share your documents in Workshare.

↑ Copy

Copy workspaces, folders or files to Workshare

You can publish your iManage matters and files by copying them to Workshare and sharing as needed. Copying is a one-way upload, meaning that if you make any changes in Workshare, those changes will not be synced back to iManage.



First, right-click a workspace, folder or file and select **Copy to Workshare**. The **Copy to Workshare** dialog will open.

Next, click **Change location** to open the **Folder location** dialog and choose a location:

- To save to an existing Workshare folder, select the folder and click **OK**.
- To save to a new Workshare folder, either click **Folders** or select an existing folder, then click **Create new folder**. Name your folder. Click **OK**.

To share your files, enter a name or email address in the field provided and click **Add**. To keep your files private, leave this field blank.

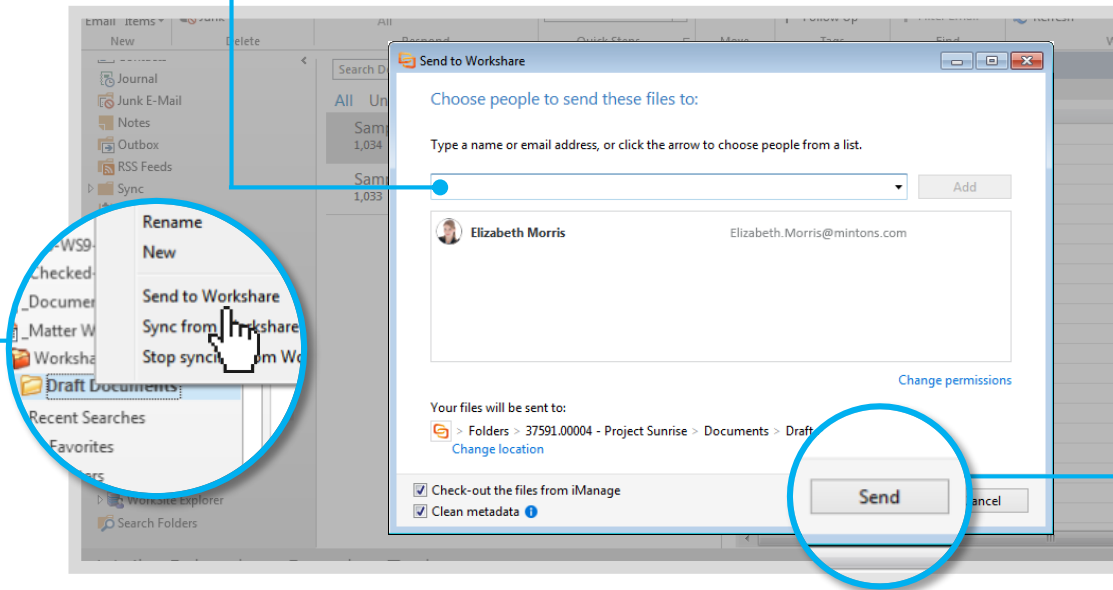
When you're ready to go, click **Copy**.



Send folders and files to Workshare

If you want to keep working on a folder or file, you should send it to Workshare. When you send a folder or file to Workshare, you can sync changes (e.g. new versions or comments) back to iManage.

- 1 Right click a file or folder and click **Send to Workshare**.
- 2 To share your files, enter a name or email address and click **Add**. To keep your files private, leave this field blank.
- 3 When you're ready to go, click **Send**.



By default:

- **Your files will be sent to a folder in Workshare with the same name as your folder in iManage.** To put them somewhere different, click **Change location**.
- **Your files will be checked out of iManage.** You can leave them checked in by deselecting the checkbox.
- **Your files will be cleaned of metadata.** You can leave the metadata in your files by deselecting the checkbox.



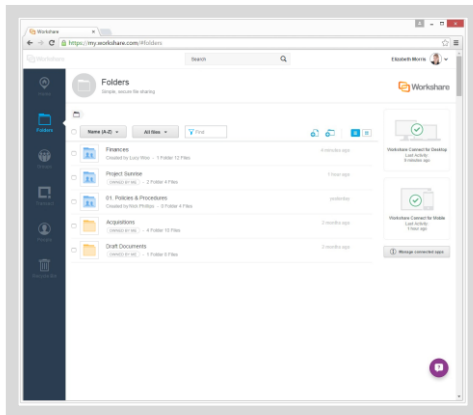
Access

Work on your files, wherever you are

Now that your files are in Workshare, they're available from a browser, your desktop and your mobile.



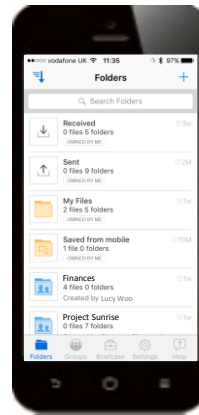
Online



You'll always have access to Workshare from a browser. Simply go to my.workshare.com



On your mobile

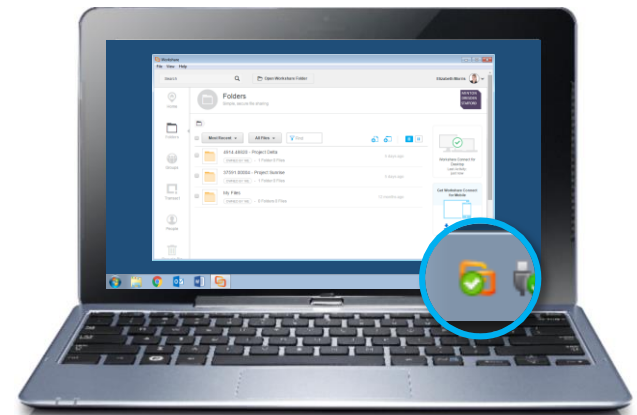


With the Workshare mobile app, you can collaborate on the go.

The iPad, iPhone and Android apps are free for you and anyone you're working with to download from [iTunes](#) and [Google Play](#).



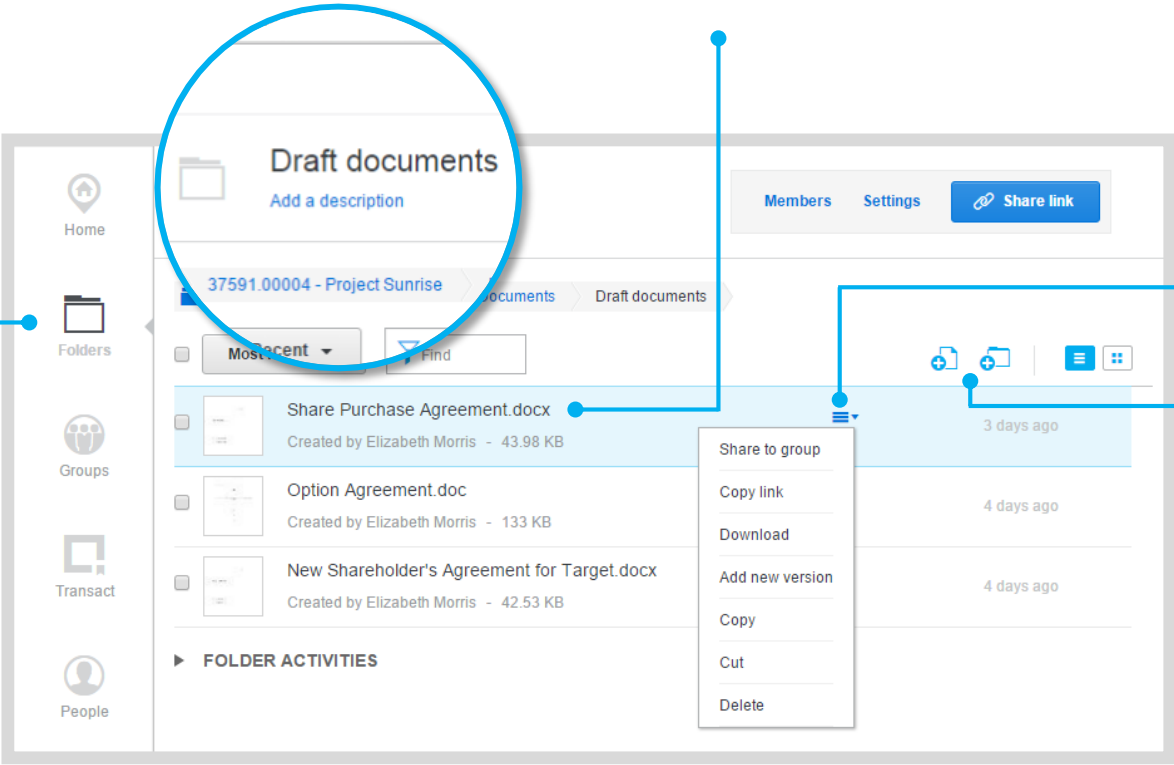
On your PC or Mac



Your files are also available from the **Workshare desktop app** on your computer. Click the system tray icon to easily access Workshare's functionality.

See, download and manage your files in Workshare

In Workshare, you have immediate and secure access to your files.



The screenshot shows the Workshare interface. On the left is a sidebar with navigation icons: Home, Folders, Groups, Transact, and People. The main area displays a 'Draft documents' folder. A blue circle highlights the 'Draft documents' folder icon and its name. A line points from the 'Folders' icon in the sidebar to the text 'To view all your Workshare content, click **Folders**.' Another line points from the 'Draft documents' folder to the text 'Select a file to view it.' A third line points from the 'Share Purchase Agreement.docx' file to a context menu that appears when it is clicked. The menu contains options: 'Share to group', 'Copy link', 'Download', 'Add new version', 'Copy', 'Cut', and 'Delete'. A fourth line points from the 'Download' option in the menu to the text 'Select the menu next to a file to download, update or delete it.' A fifth line points from the '+' icon in the top right of the file list to the text 'You can upload more files and create subfolders as needed.'

Select a file to view it.

Select the menu next to a file to download, update or delete it.

You can upload more files and create subfolders as needed.

To view all your Workshare content, click **Folders**.

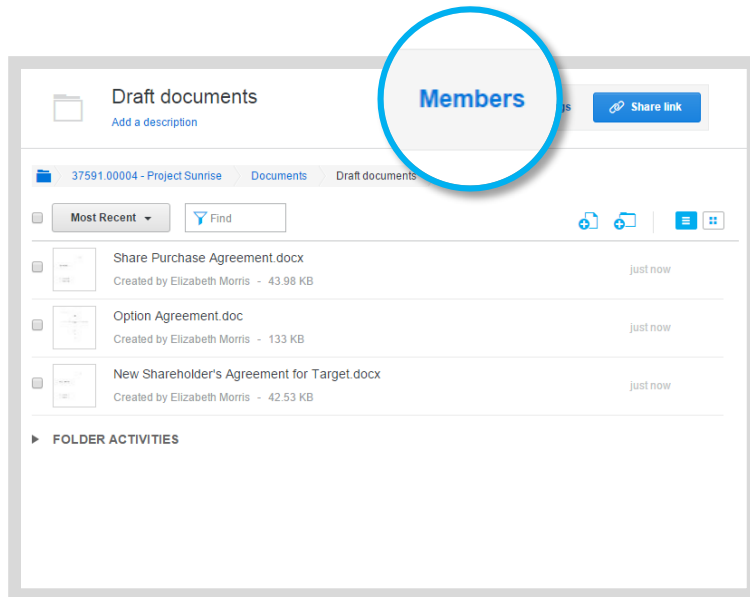


Subfolders will only sync back to iManage if they have files in them.

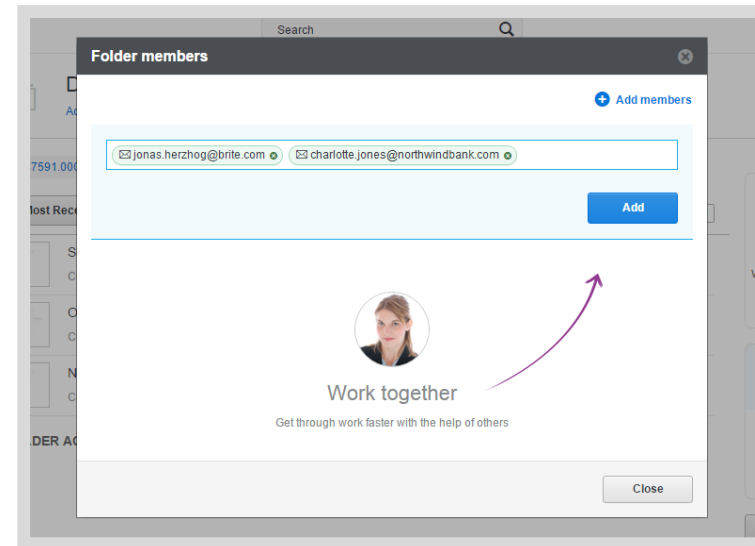
Add members to the Workshare folder

You can see a folder's members and add more at any time. Folder members are able to upload files, download files and add other members according to the folder's settings.

If you shared your iManage folder when you sent it to Workshare, those people will appear as members. If you kept your files private, your folder will not have any members initially.



Click **Members**.



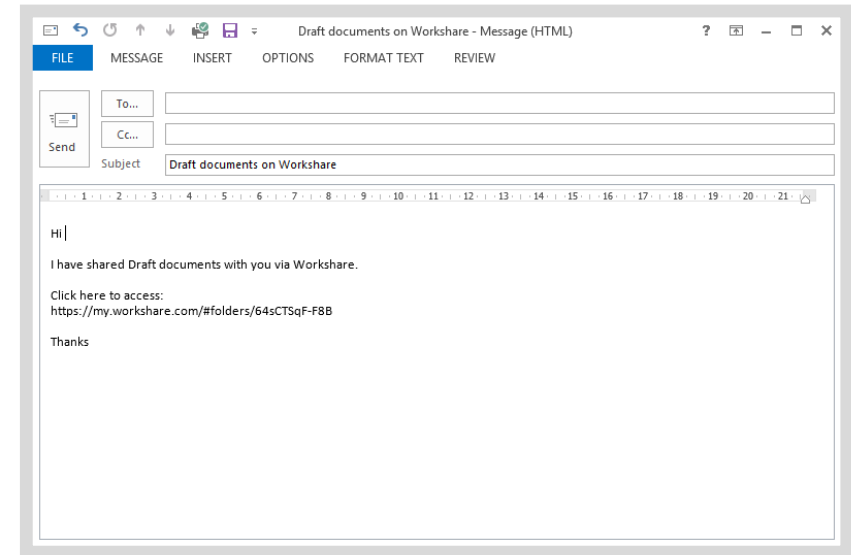
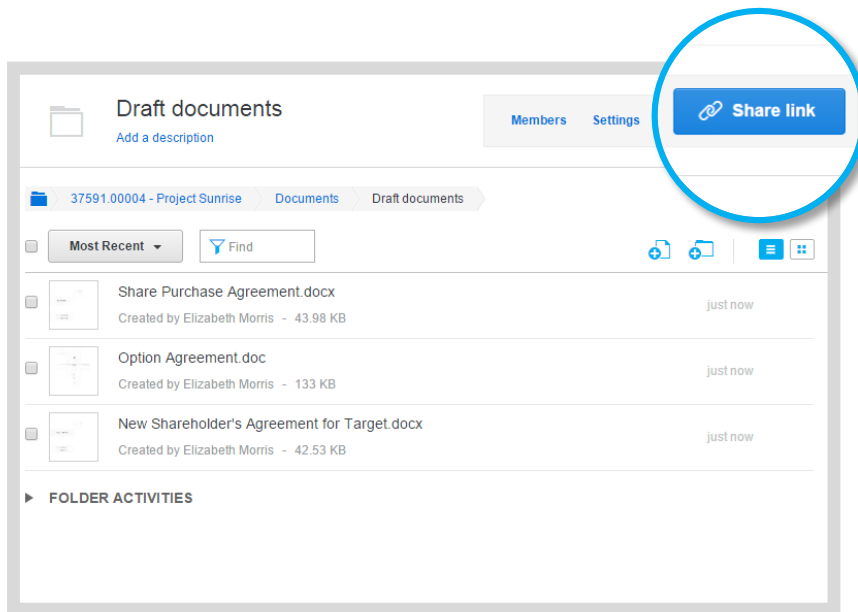
To add members, enter their email addresses and click **Add**. These people are now members, and an email invitation from Workshare with a link to the folder will be sent to them.



Share

Share a link to the Workshare folder

Share link is a more personalized way to add members to a Workshare folder.



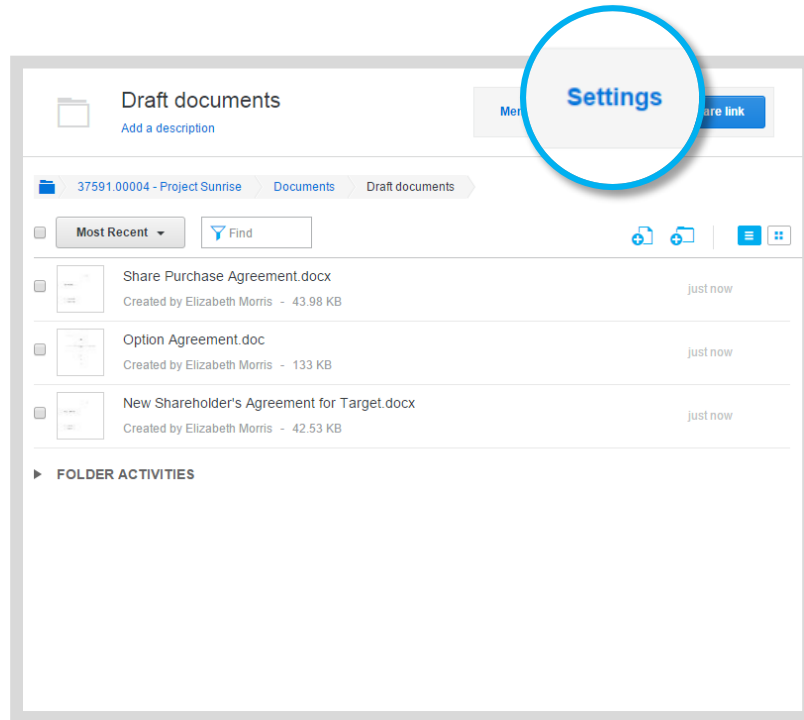
First, click **Share link**.

An email will open with a link to the folder in Workshare. The email will come from you. You can add a personal message before sending the email.

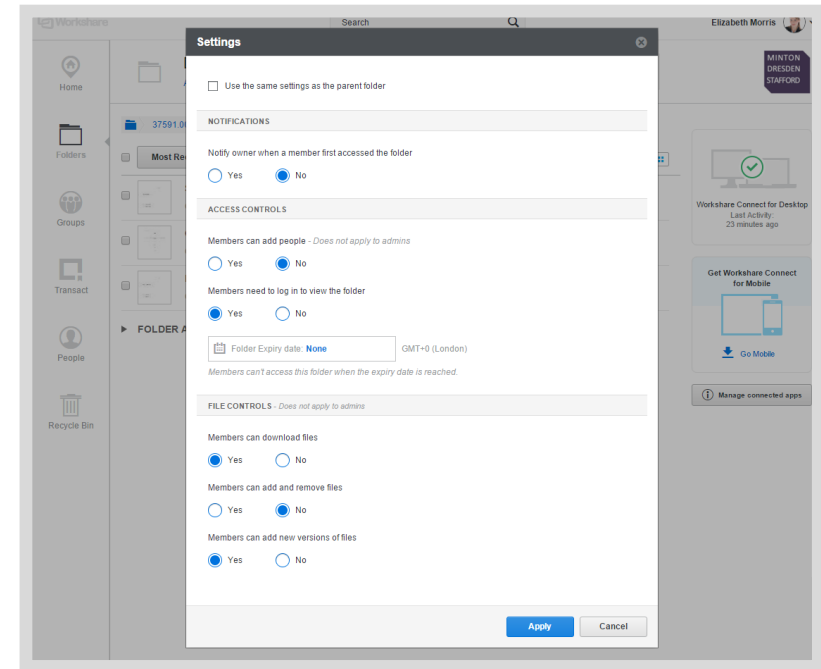
When an email recipient follows the link, they'll be added to your folder as a member.

Modify the settings for your Workshare folder

In Workshare, you control what people can do with your documents and how they can be accessed by adjusting the folder's **settings**.



First, click **Settings**.



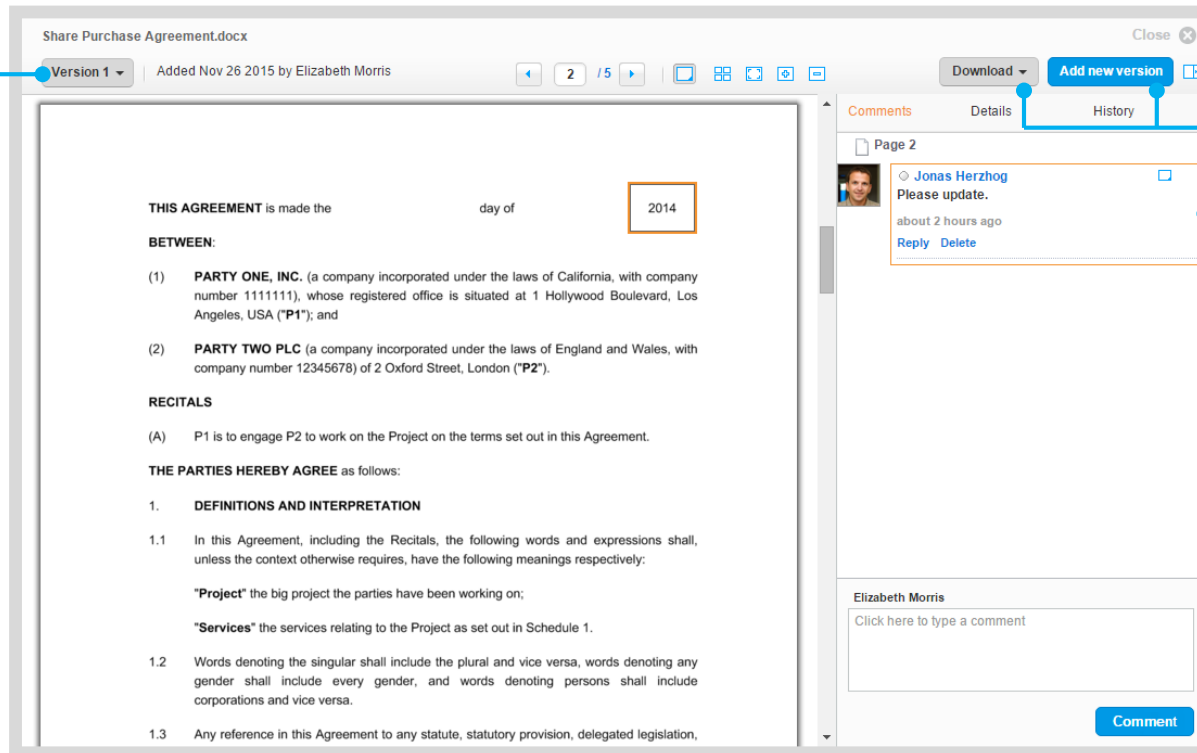
Adjust the settings as needed and click **Apply**. The settings will be applied to all members of the folder and to members of subfolders inheriting the parent folder's settings.

Make comments and reviews in Workshare

When you've shared a folder, everyone can see the most recent file versions and people's feedback in the document preview. Simply click a document to preview it.

Go back to a previous version and its comments or compare two versions to see what's changed.

Download the file to work on it and upload the new version when it's ready. Folder members will be notified about the update.



The screenshot displays the Workshare interface for a document titled "Share Purchase Agreement.docx". The document is shown in a preview mode, with a sidebar on the right for comments and details. The document content includes sections for "THIS AGREEMENT", "BETWEEN:", "PARTY ONE, INC.", "PARTY TWO PLC", "RECITALS", and "THE PARTIES HEREBY AGREE". A comment from Jonas Herzog is visible in the sidebar, stating "Please update." and "about 2 hours ago". The interface also shows a "Version 1" dropdown, a "Download" button, and an "Add new version" button. A blue line with dots connects the text instructions to the corresponding UI elements: the "Version 1" dropdown, the "Add new version" button, and the comment box.

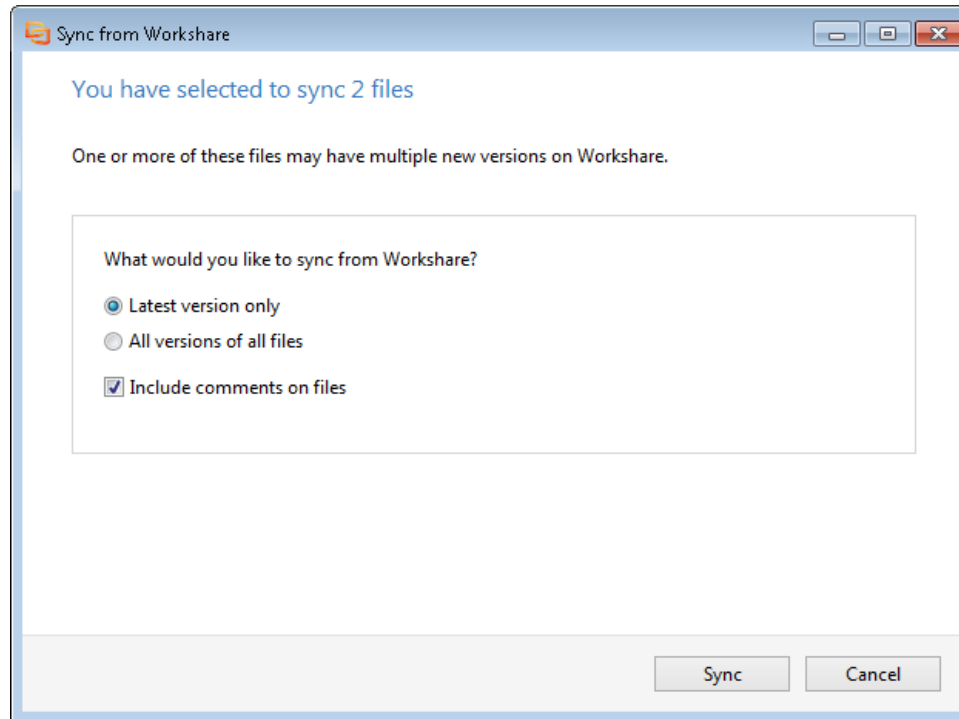
Click and drag on the page or use the text box at the bottom to note your suggestions and reviews. Folder members will be notified about your feedback.



Sync files and folders to iManage

For files that have been **sent** to Workshare, you can sync the changes from Workshare to iManage at any time. In iManage, simply right-click the folder and select **Sync from Workshare**.

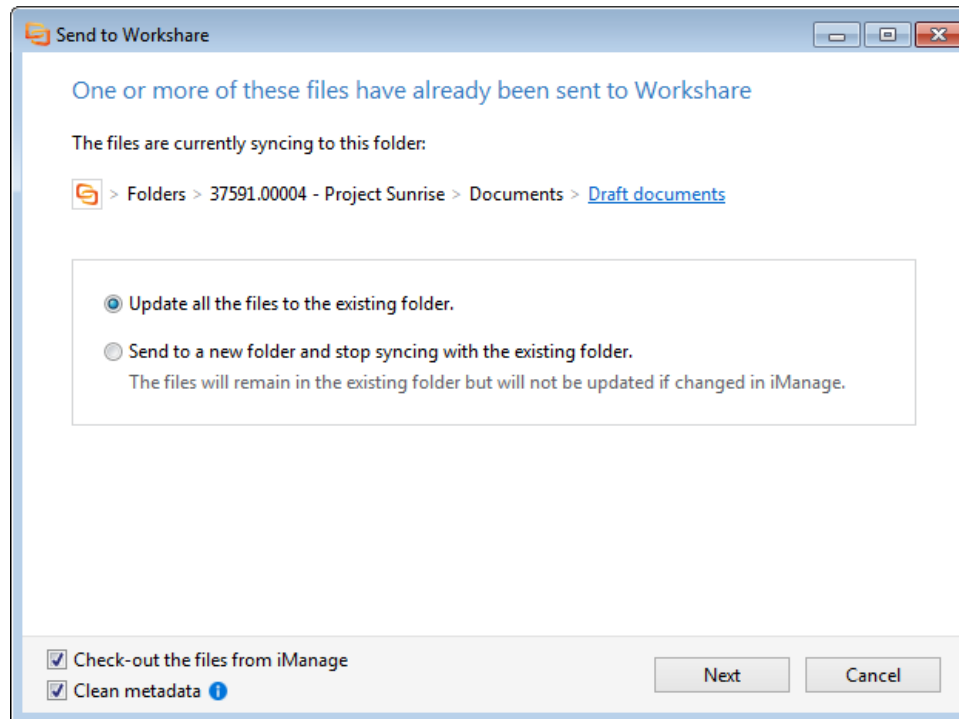
If new versions have been added to the files on Workshare, you'll be asked whether you'd like to sync all the versions or just the latest version to iManage. You'll also have the option to download any comments made on Workshare. If you download comments, they'll appear in new PDF files that you can access by going to a document's **related files** in iManage.





Sync files and folders to Workshare

Whenever you add a new file or version to an iManage folder that you've already **sent** to Workshare, you'll be asked if you want to send that new file or version to Workshare.

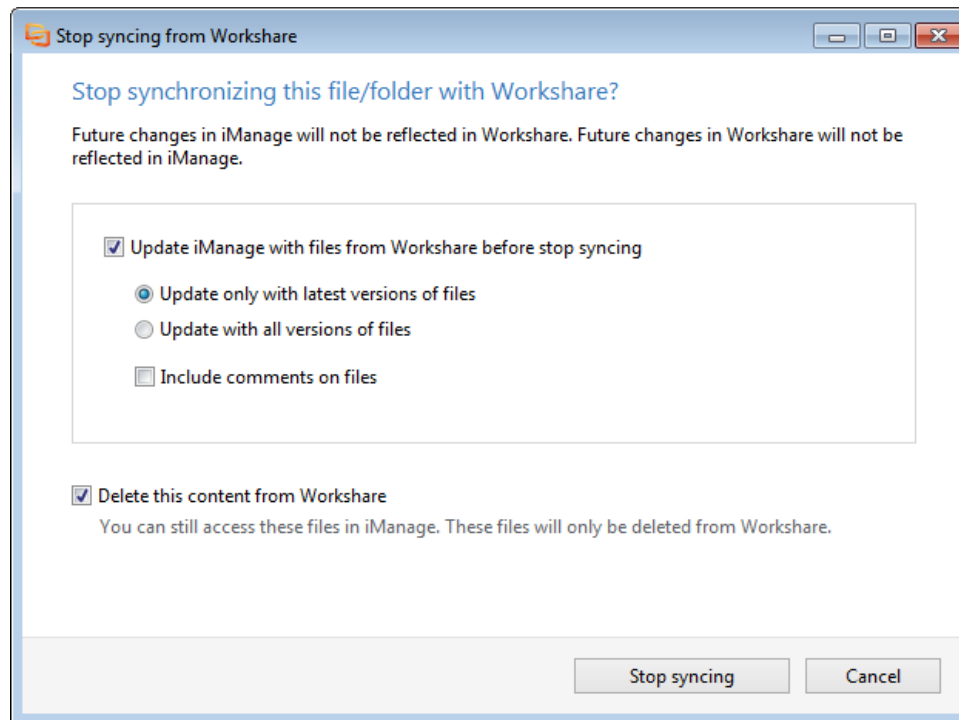










Stop syncing

At any time, you can end the connection between Workshare and iManage for **sent** files. Simply right-click the folder and select **Stop syncing from Workshare**.

You'll have the option to update your iManage files one last time. You can also choose whether you'd like to delete the content from Workshare.



[illegible]

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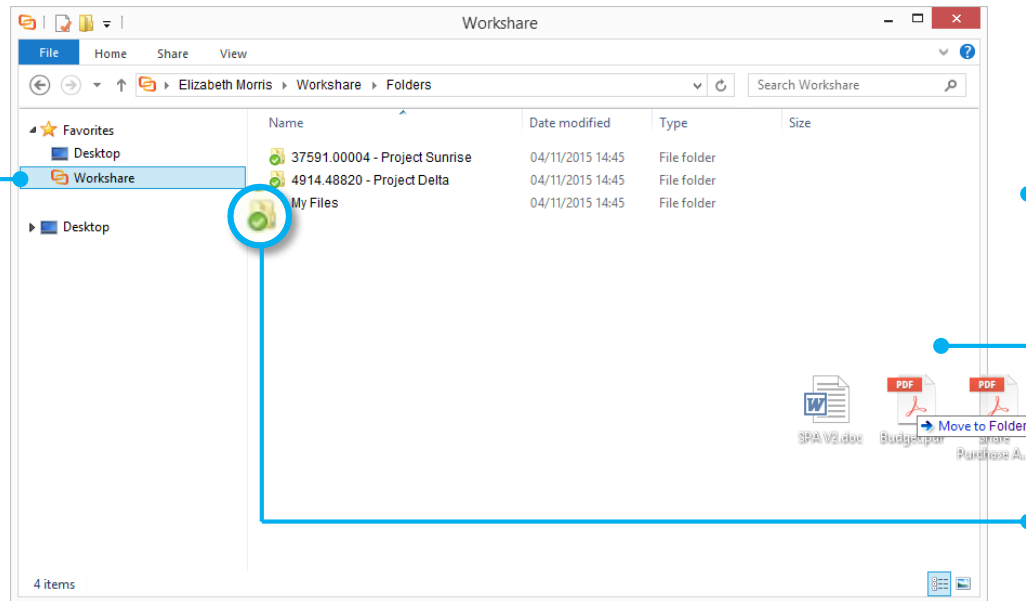


Sync content between Workshare and your local drive

If your administrator has enabled local sync, you can use the Workshare folder to sync content between your local drive and Workshare.

Your **Workshare** folder is here on your computer.

The documents here sync to Workshare. This means if you add, update or delete a file in either this folder or Workshare, it will be added, updated or deleted in the other location too.



To add files, go to your Workshare folder, select **Folders** and drag your files in.

When a file or folder is synced to Workshare, it displays a green checkmark.



You can tell if your administrator's enabled local sync by viewing the Workshare folder. If the folder shows **Folders** and **Groups**, your admin has enabled local sync. If the folder's empty, your admin has not enabled local sync.

➤ Knowledge base

For step-by-step instructions to use these features, see

workshare.force.com/knowledgebase

➤ Technical support

If you have any questions, email us at

support@workshare.com