

Workshare iManage Integration

Admin Guide

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Introducing the iManage Integration

This guide is to help administrators download and install Workshare's iManage integration (file sharing & DMS mobility).

The iManage integration gives users the ability to synchronize their iManage files to Workshare so they can access them or share them outside the corporate firewall. This means users can work outside the office in a secure space that is synchronized with iManage.

System Requirements

The Workshare iManage integration supports:

- iManage clients from 8.5 SP3 to 9.3.
- The latest publicly released versions of iManage servers.

Downloading the Installer

In order to integrate iManage with Workshare, you must install the Workshare integration on all client machines. The executable file is downloaded from the **Services** tab in the Workshare Admin Console.

To download the Workshare integration installer:

1. Sign in to Workshare in your browser.
2. Click your user name in the topbar and select Admin Console.
3. Select the **Services** tab and select **Integrations** in the left menu.
4. Click **Download iManage Integration**. The iManage integration installation executable is downloaded to your Downloads folder.

Deploying the iManage Integration

Once you have downloaded the installation executable, you must install it on all client machines that you want to have access to the Workshare iManage integration.

The iManage integration gives users the ability to synchronize their iManage files to Workshare. This allows a user:

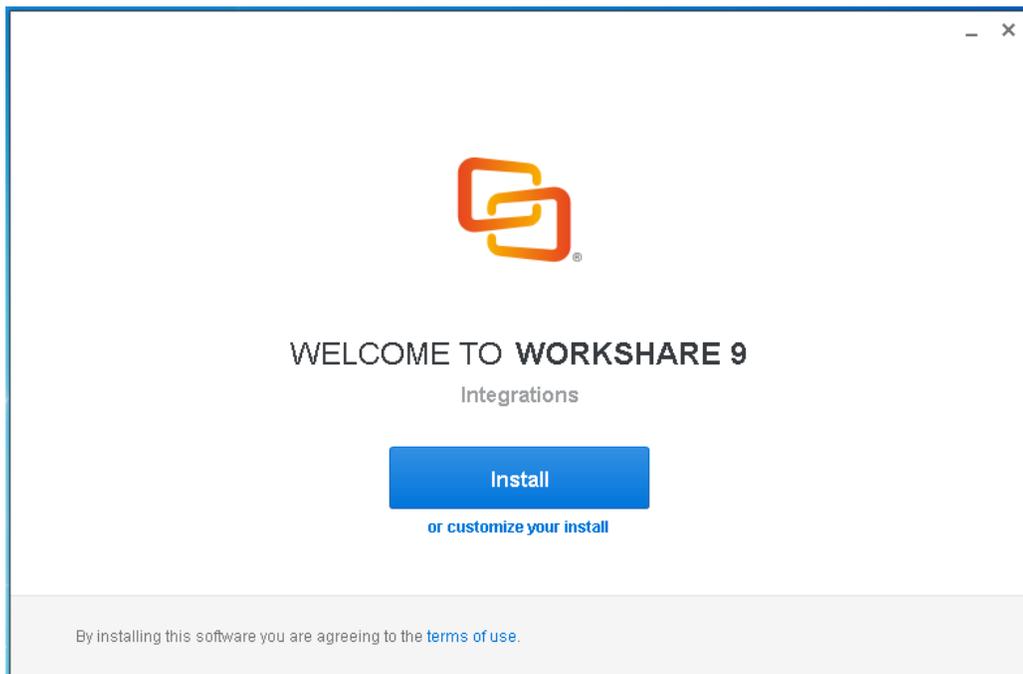
- To access their iManage content securely while out of the office/on other devices
- To share their iManage content securely with people who may not work for the same firm

You can choose whether to include local sync in the iManage integration (this is selected by default) and this will synchronize Workshare content to the user's local drive. This means users can access their iManage files while on the move and offline, and sync them back to Workshare and iManage when they are online again.

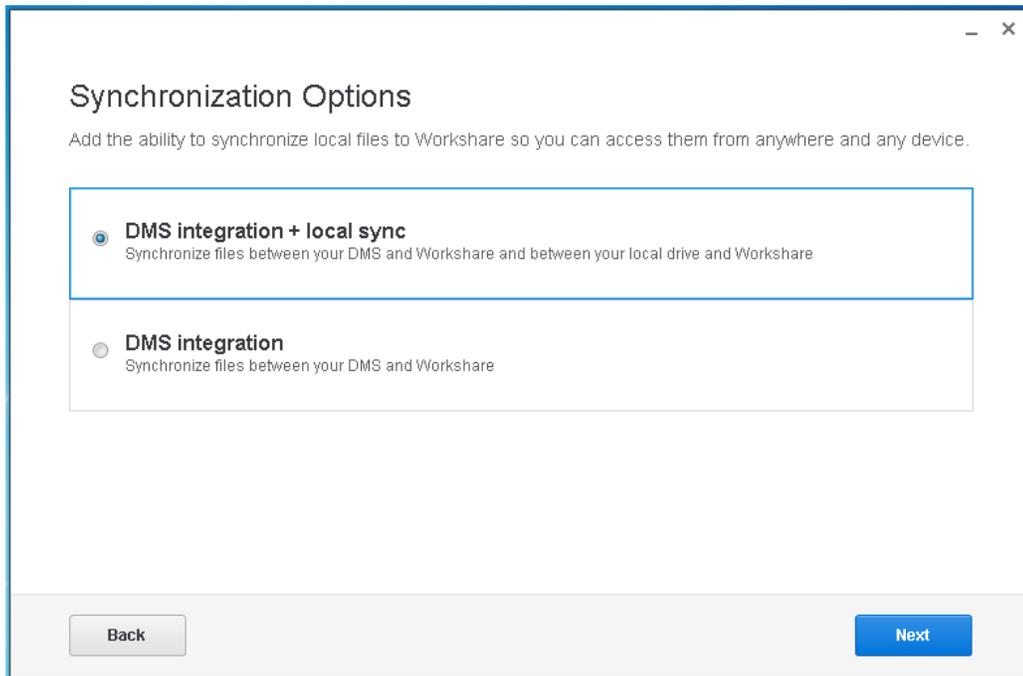
The following procedure describes a local install on a single machine, or you can deploy using a command line installation or third party deployment product.

To install the iManage integration:

1. Double-click the installation executable.

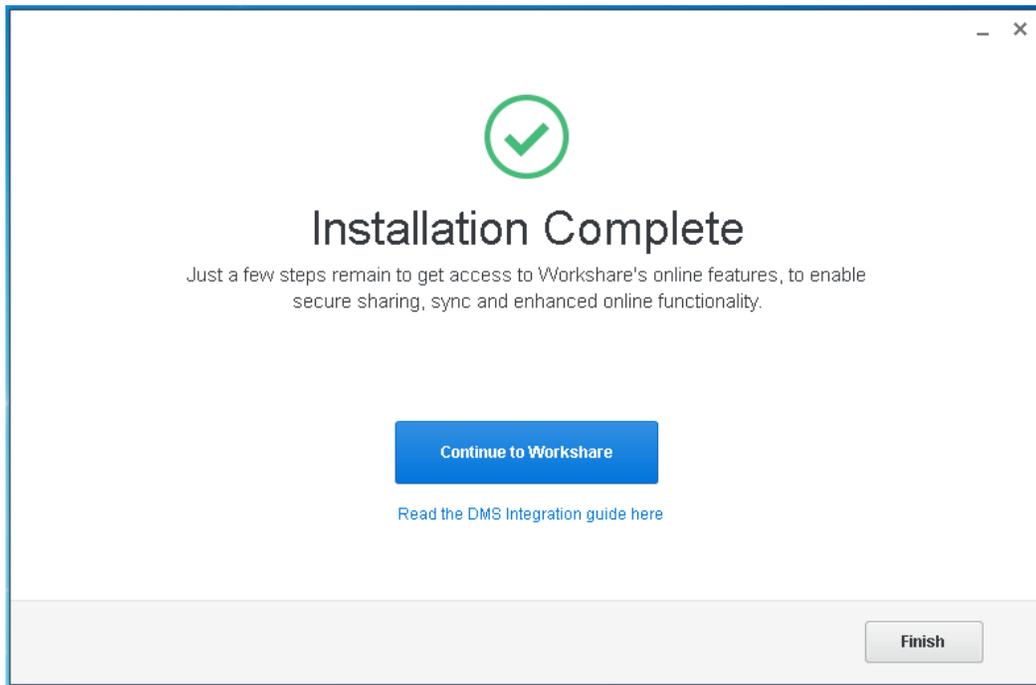


2. Click **Install** to install the default installation or click **customize your install** to specify your install as follows:

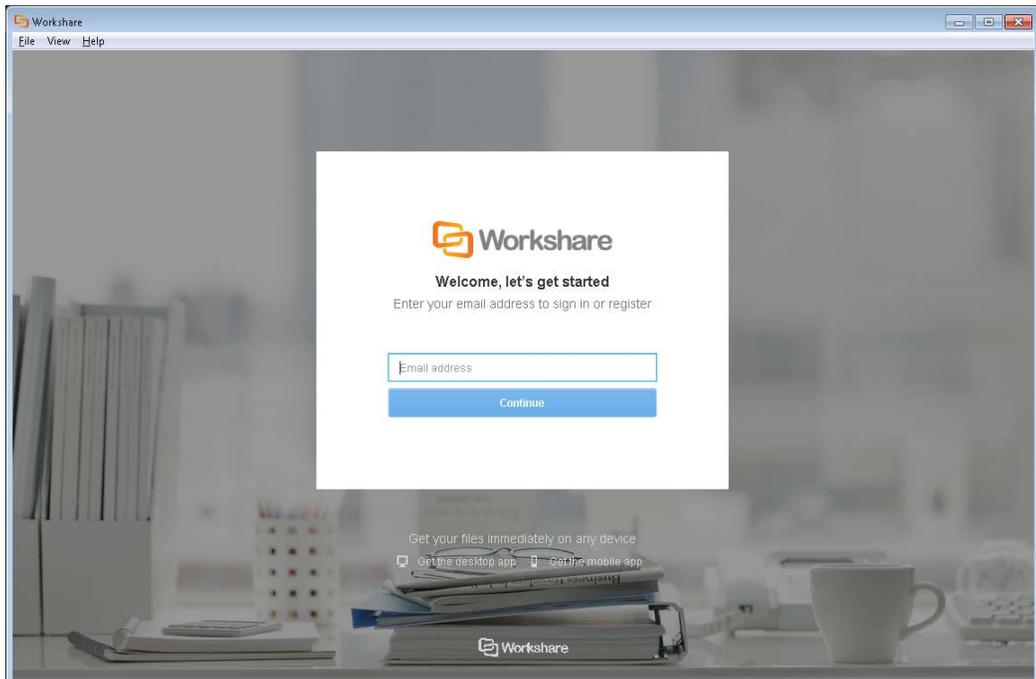


3. Select your installation from the following:
 - **DMS integration + local sync:** This option enables synchronization between iManage files and Workshare, and also between Workshare and the local drive.
 - **DMS integration:** This option enables synchronization between iManage files and Workshare only.

4. Click **Next**. The integration is installed and once done the Installation Complete message is displayed:



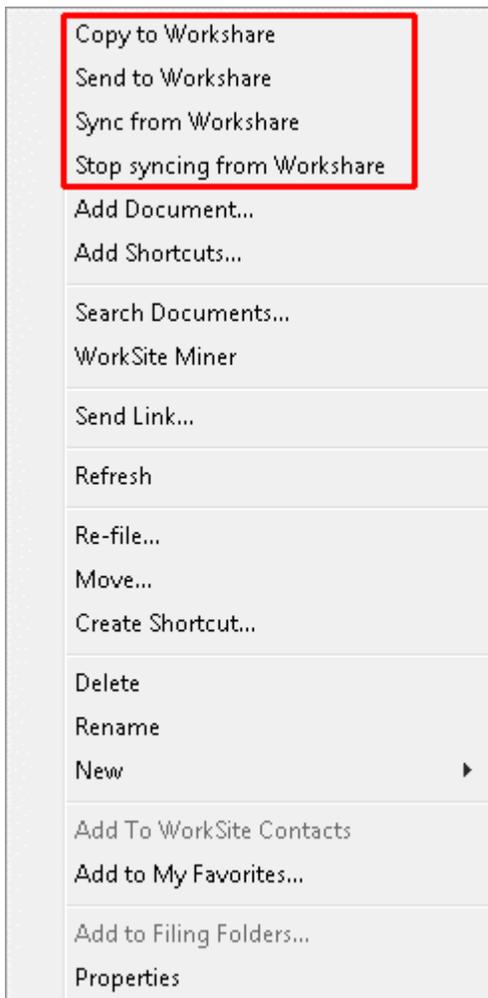
5. To complete the installation, users must sign in to Workshare. Click **Continue to Workshare**. The installer closes and the Workshare desktop app is opened prompting the user to enter their Workshare login details (email address and password).



Once signed in, the desktop app Welcome screen is displayed and, if local sync is installed, Workshare files will start syncing to the Workshare folder on the desktop.

What the User Sees

When the iManage integration has been successfully deployed, users can use right-click options within iManage to upload files and folders to Workshare, synchronize updated Workshare files and folders back into iManage as well as copy entire matters into Workshare.

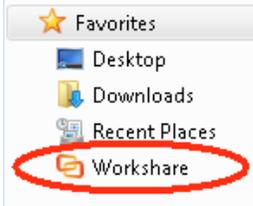


In addition, users will have the Workshare desktop app installed locally. The Workshare desktop app provides a window into Workshare online from the desktop with access to all the online functionality.



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.

Why do you need the Workshare desktop app?

The iManage integration is coupled with the Workshare desktop app. When files are uploaded (sent from iManage to Workshare), they go via the desktop app's upload engine. The Workshare folder is not used and the only thing the user will see is sync activity on the desktop app system tray icon and in the Sync Progress report/page of the desktop app. If a user already has an older version of the Workshare desktop app, the iManage integration installation will upgrade it.

Files sent from iManage to Workshare will not be in the Workshare sync folder unless the user is also syncing the target folder in Workshare with their desktop. The desktop app is NOT used for syncing back from Workshare to iManage.

What's the difference between "local sync" and "DMS integration" installs?

During install of the Workshare iManage integration, you can select "DMS integration" or "DMS integration + local sync". In both types of installation, the Workshare desktop app is installed.

When local sync is included, the user gets the possibility to synchronize Workshare content to their local Workshare folder.

When local sync is not included, the desktop app will still provide a window into the Workshare online environment but it will not include synchronization to the local drive. In particular:

- Selective sync is turned off by default
- Users are not able to get to the Selective Sync dialog
- The Workshare folder will remain, but if a user places files in this location they will not sync to Workshare

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