Workshare Connect

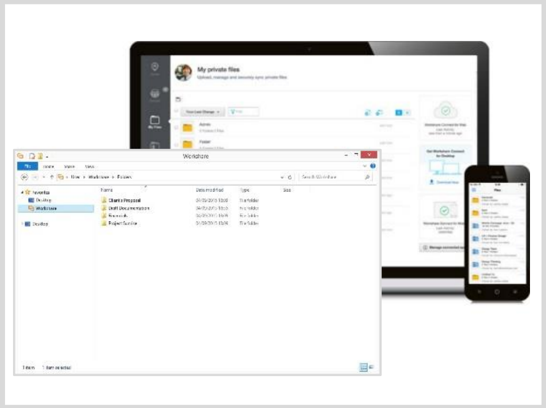
Getting Started Guide

Workshare®

Hello, we're very happy to have you on board

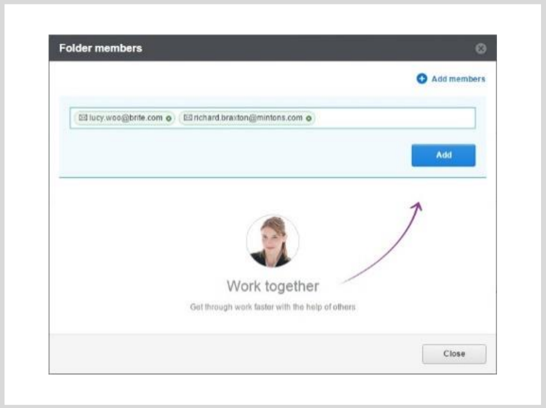
We're all about document collaboration. It's a simple concept with a simple goal. We help you work on documents with others by connecting you to the people you work with, the documents you care about and the devices you use.

Sync



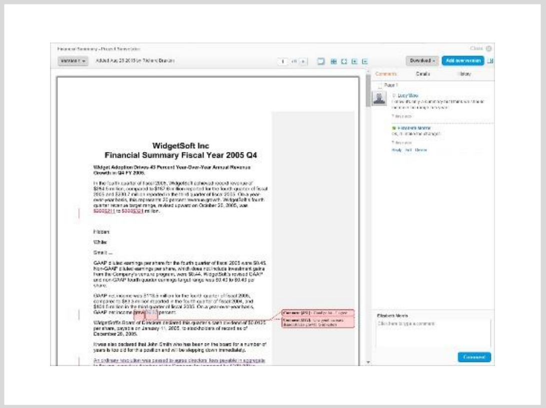
Work wherever you want by adding your documents to Connect. They'll be accessible online, on your desktop and on your mobile.

Share



When you're ready to work with others, share your documents in a secure workspace.

Collaborate



Have conversations together, mark up documents with comments and even compare versions.

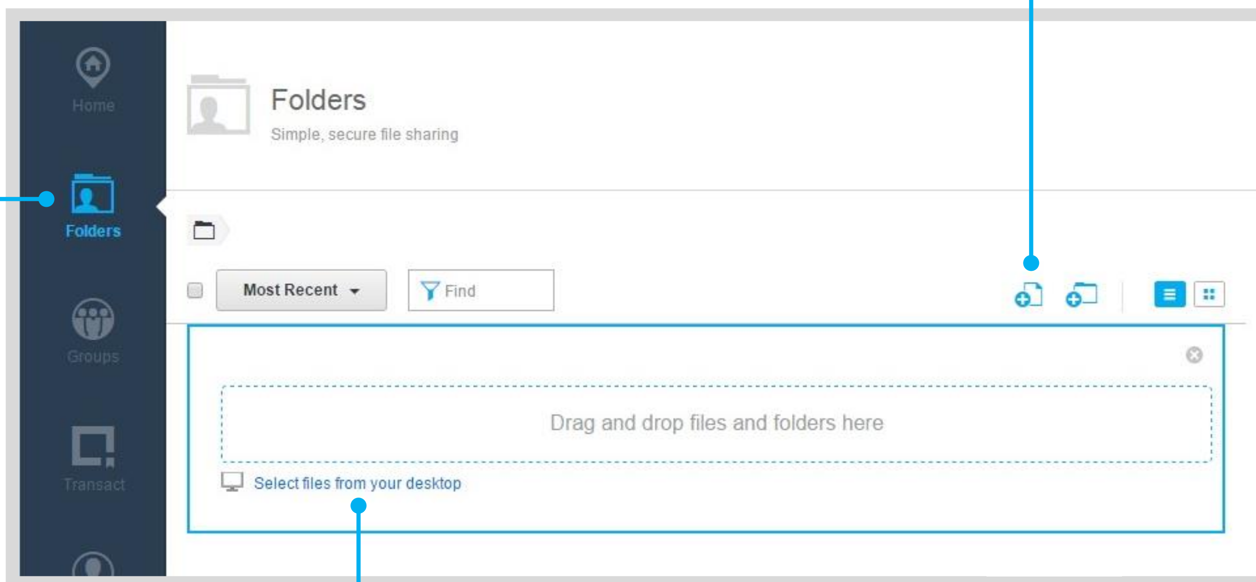
Sync

Add files to Connect from a browser

The first step is to add files to Connect. You can do this from a browser or from Windows Explorer or Mac Finder. This page explains how to add files from a browser. See the next page to find out how to add files from Explorer and Finder.

To add files from your browser, go to my.workshare.com and select **Folders**.

Next, click the **File** icon.



You can drag and drop files from your desktop or click **Select files from your desktop**.

A maximum 2000 files can be added at one time. To add more, sync them using the desktop app (see next page).

Sync

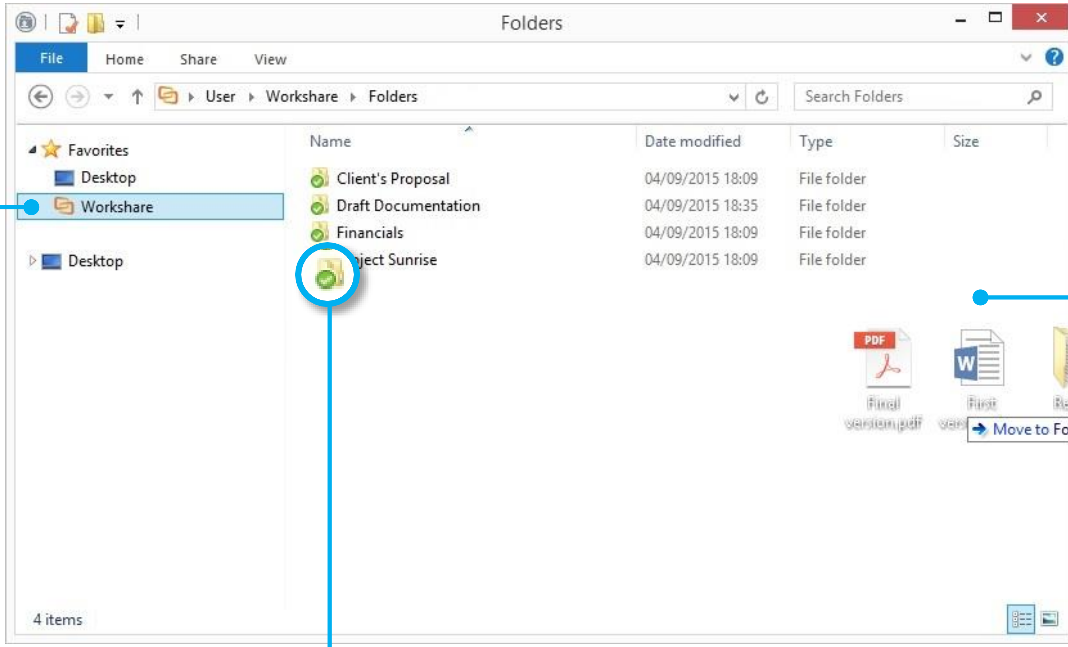
Add files to Connect from the desktop app

You can add files from Windows Explorer or Mac Finder using the Workshare desktop app. The app brings all the functionality you have online to your desktop, plus enables you to sync important files and workspaces to your computer so you can keep working even when you're offline.

To get the free app, log in to the web at my.workshare.com and go to the Download Center.

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

The documents here sync to Connect. This means if you add, update or delete a file in either the Workshare folder or Connect, 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.

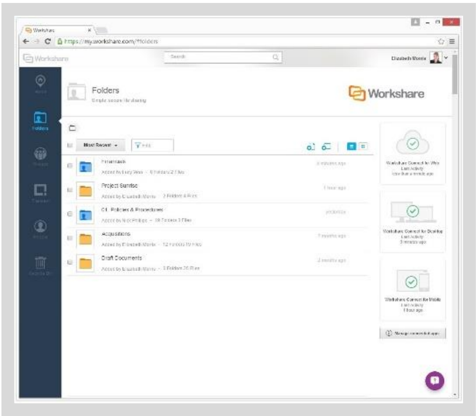
When a file or folder is synced to Connect, it displays a green checkmark.

Sync

Access your files, wherever you are

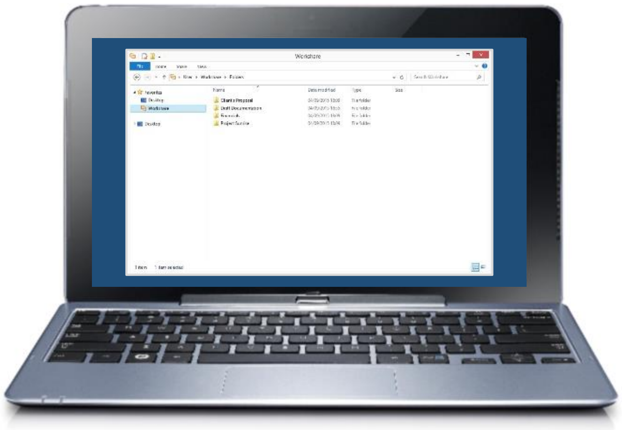
Now that your files are in Connect, they’re available from a browser, your desktop and your mobile.

Online



You’ll always have access to Connect from a browser. Simply go to my.workshare.com

On your PC or Mac



Your files are available from the **Workshare** folder on your computer. When you open a file from the **Workshare** folder, it opens in its native application so you can edit it.

Get the desktop app for free from the Workshare Download Center.

On your mobile

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

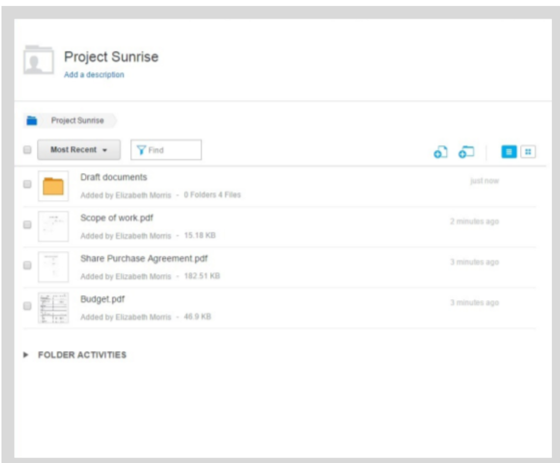
The iPad and iPhone app is free for you and anyone you’re working with to download from iTunes.

Share

Choose a workspace that's right for you

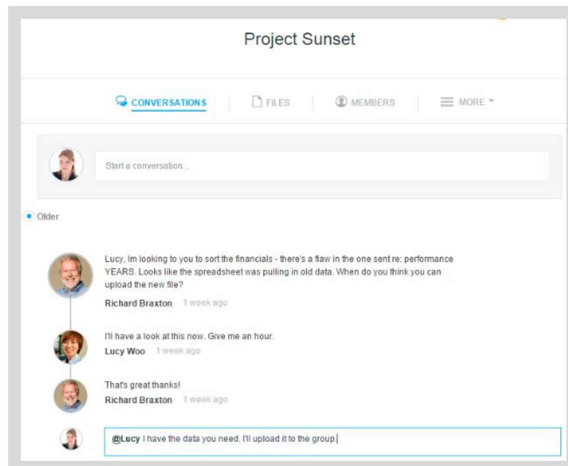
Workshare enables you to create secure spaces that go beyond simple file sharing. When you're ready to work with others, think about what kind of project you're working on and choose the type of workspace that fits your project best. All types are equally secure.

Folders



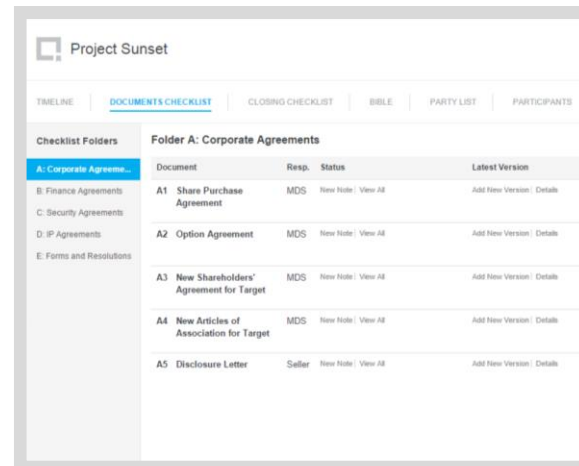
Folders are familiar, structured spaces that are ideal when you're working with clients or you need a more static place to share or publish documents.

Groups



Groups are perfect when you need a place to evolve documents rapidly. Groups give you an area for conversations and @mentions, allowing for more dynamic workflows.

Deals



Deals are spaces designed to manage legal transactions. Deals are available as an add-on for Connect. For more information, see the Transact Getting Started Guide.

Share

Create a folder

Folders provide a layout that's familiar to many people. This makes Folders an ideal choice when you're sharing documents with clients or you need a more static place to share or publish documents. They can be used to create client extranets if needed. If your account has been branded, your folders will display that branding.

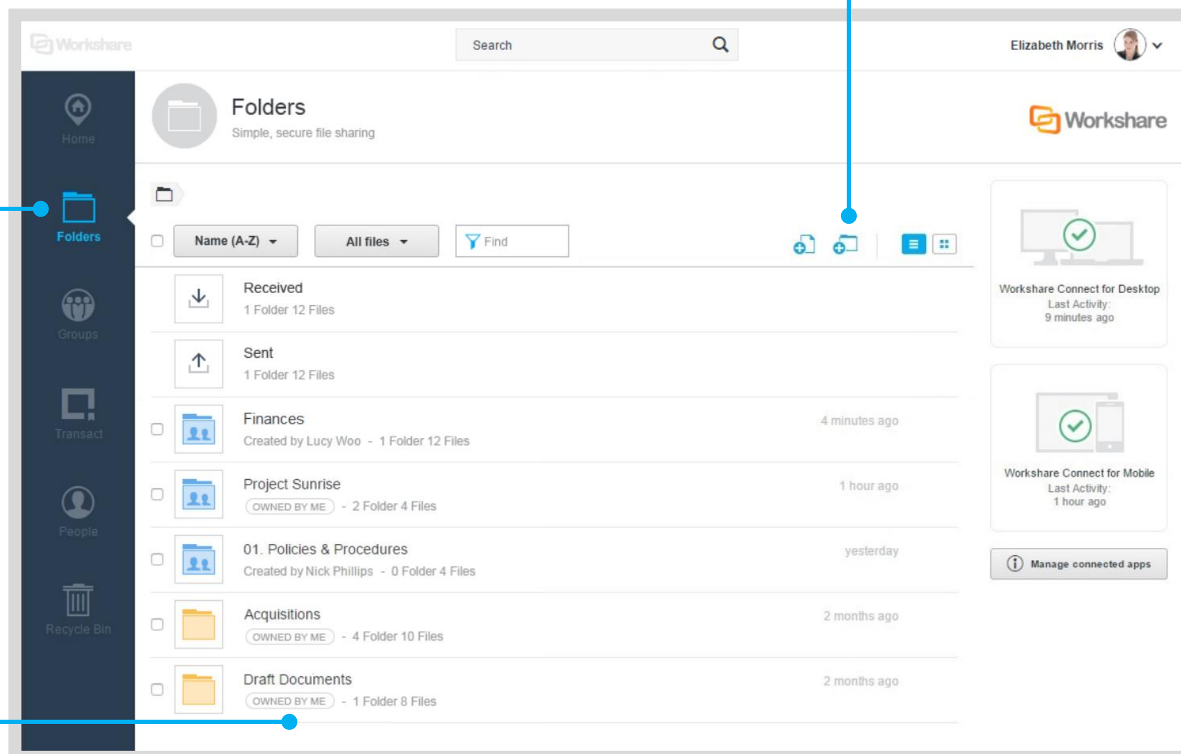
To access Folders, go to my.workshare.com and select **Folders**.

To create a new folder, click the **Folder** icon.

All your folders are here.

Shared folders are blue and private folders are yellow.

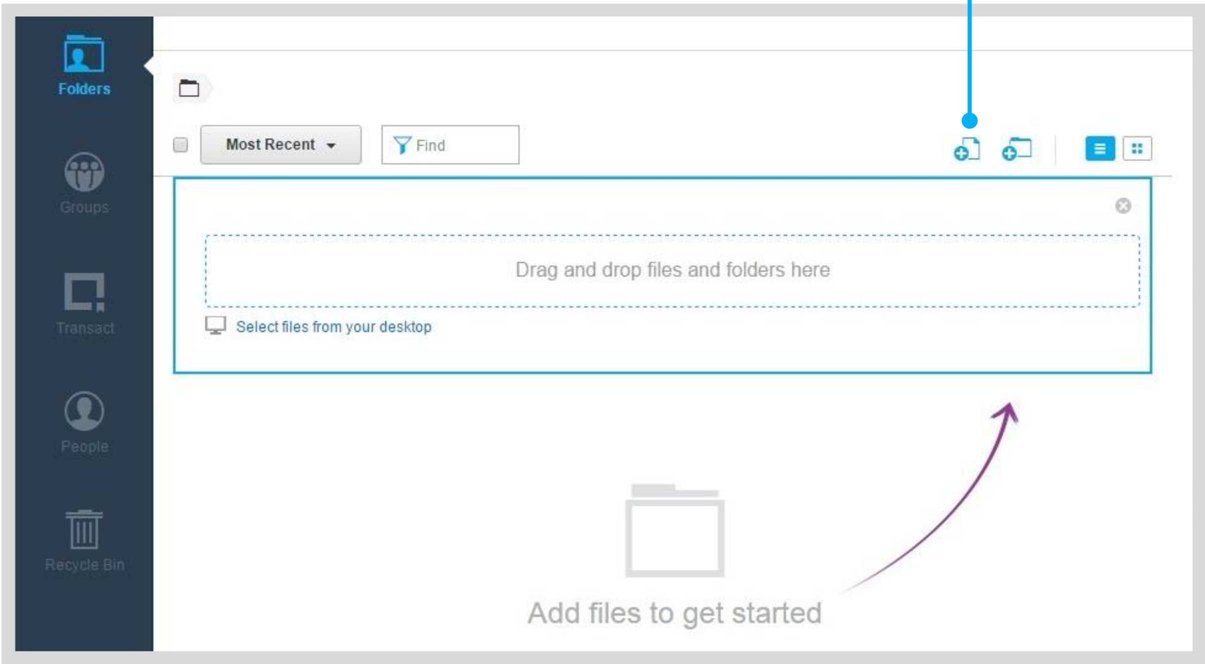
Folders you own are labelled **Owned by me**.



Add files to a folder

When you first create a folder, it will be empty. Add as many files and folders as you like.

Click the **File** icon.

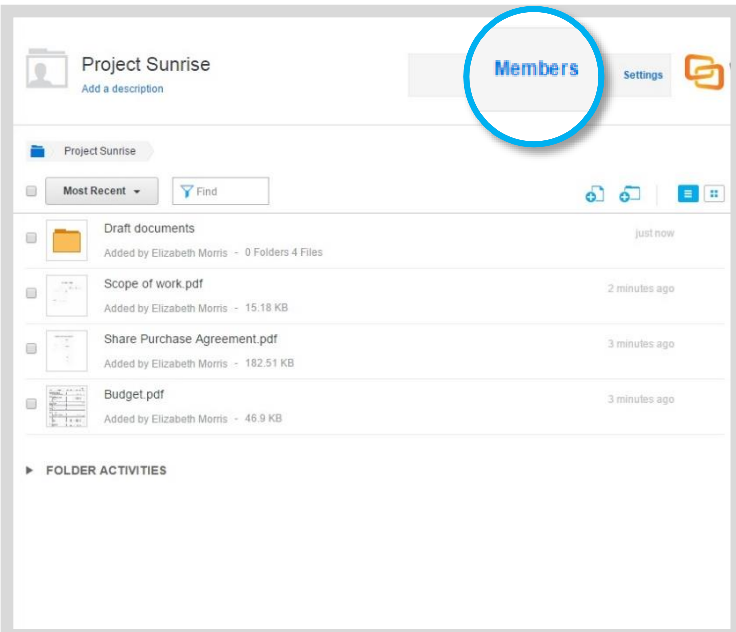


1) You can add files to any folder you own. If a folder has been shared with you, you can only add files if you've been given permission to do so in the folder's **Settings**.

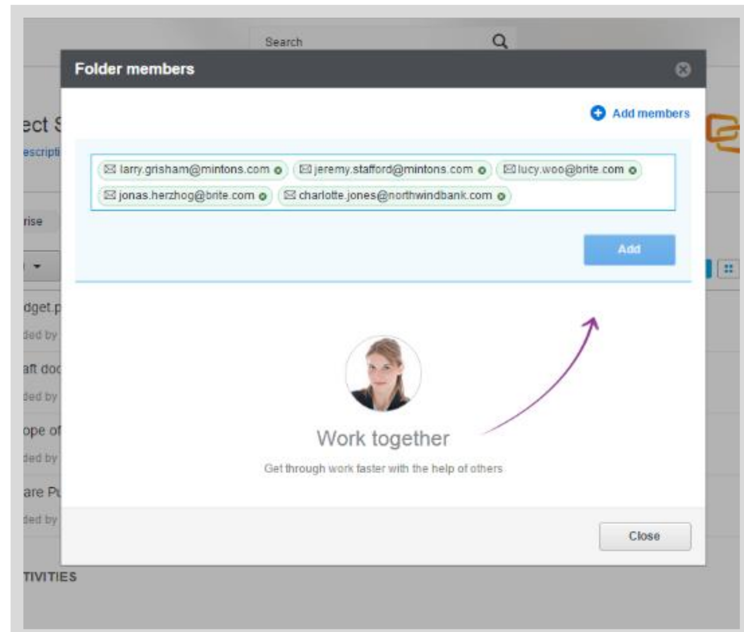
2) A maximum 2000 files can be added at one time. To add more, sync them using the desktop app (see page 4).

Add members to a folder

Once you've added files, you may want to share the folder. People sharing a folder are known as folder **members**. Members are able to upload files, download files and add other members according to the folder's settings. If you create a subfolder, it will inherit the parent folder's members by default. If needed, you can adjust a subfolder's members so they are different from the parent folder's.



To share a folder, click **Members**.



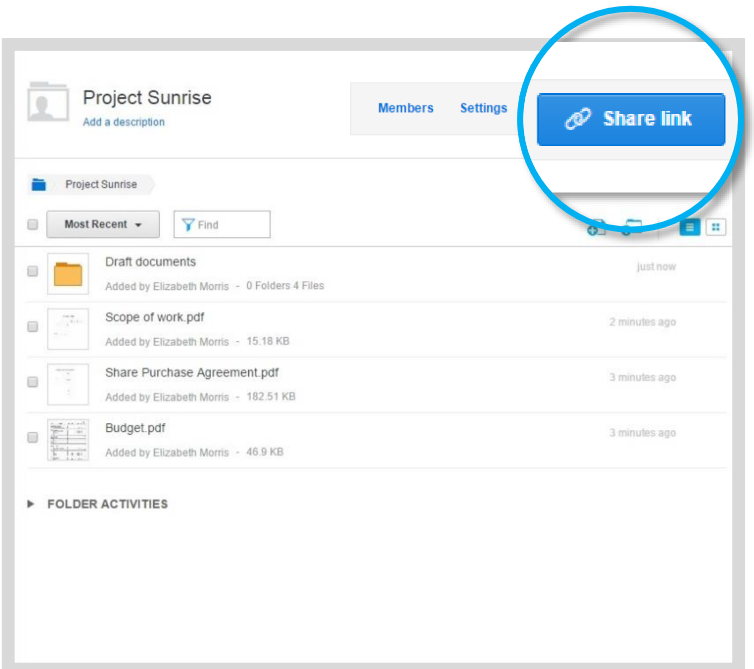
Next, type one or more email addresses and click **Add**. These people are now members, and an email invitation with a link to the folder will be sent to them.

You can view a folder's members at any time. Simply click **Members** to see who's sharing your folder.

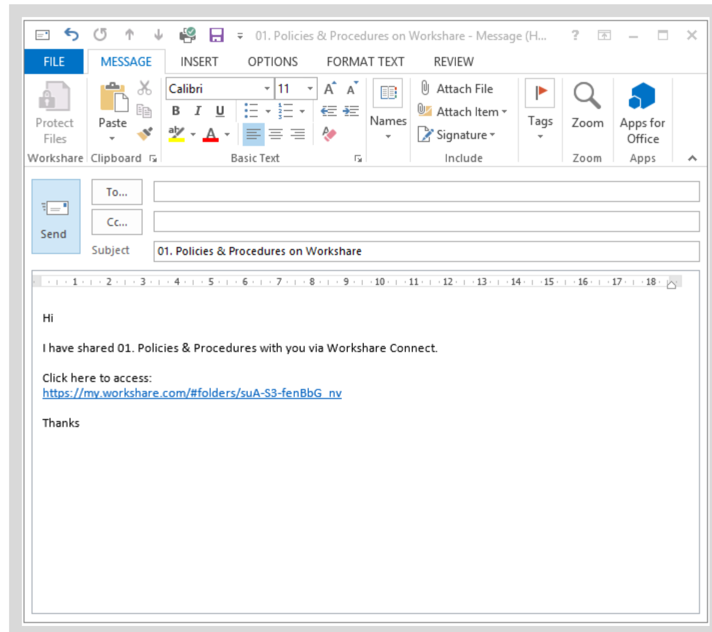
Folders

Share a folder with a link

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



First, click **Share link**.

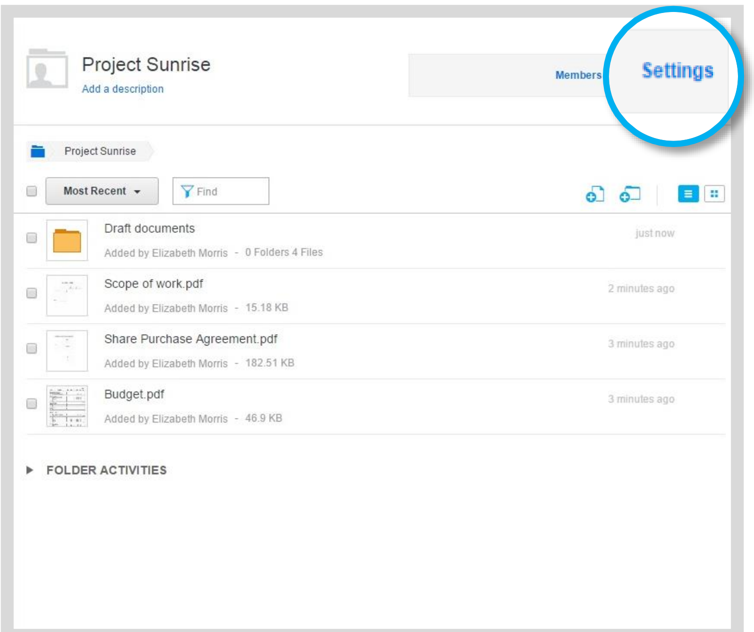


An email will open with a link to the folder in Workshare. The email will come from you. You can add a personal message before sending the email.

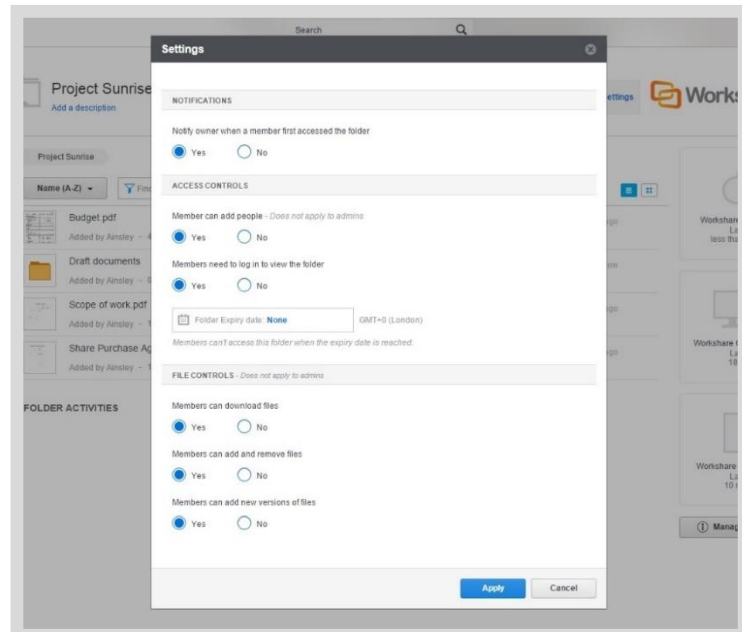
When an email recipient follows the link, they'll be added to your folder as a member.

Secure a folder

You control what people can do with your documents and how they can be accessed by adjusting the folder’s **settings**. If you create a subfolder, it will inherit the parent folder’s settings by default. If needed, you can adjust a subfolder’s settings so they are different from the parent folder’s.



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.

To determine whether a subfolder will inherit the same settings as its parent folder, go to the subfolder and click **Settings**. There is an option called **Use the same settings as the parent folder**.

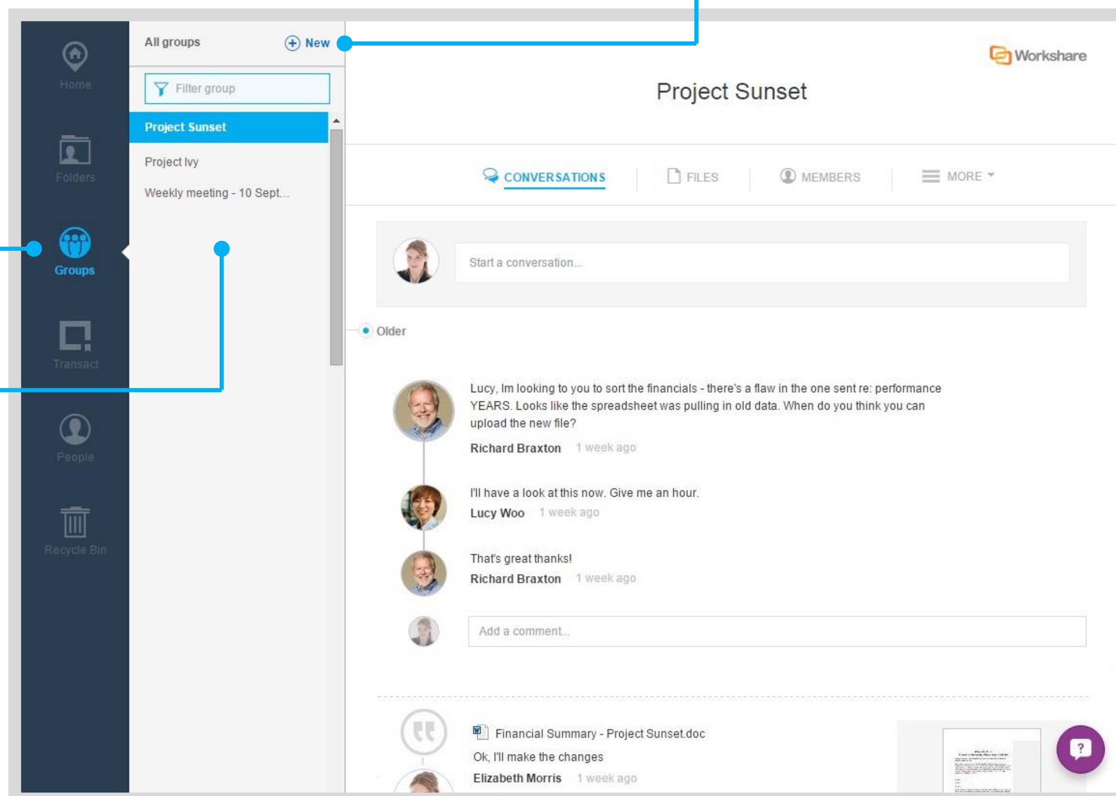
Share

Create a group

Groups are spontaneous collaborative spaces that are perfect when you need a place to evolve documents rapidly. Groups give you an area for conversations and @mentions, allowing for more dynamic workflows.

To access Groups, go to my.workshare.com and select **Groups**.

To create a new group, click **New**.

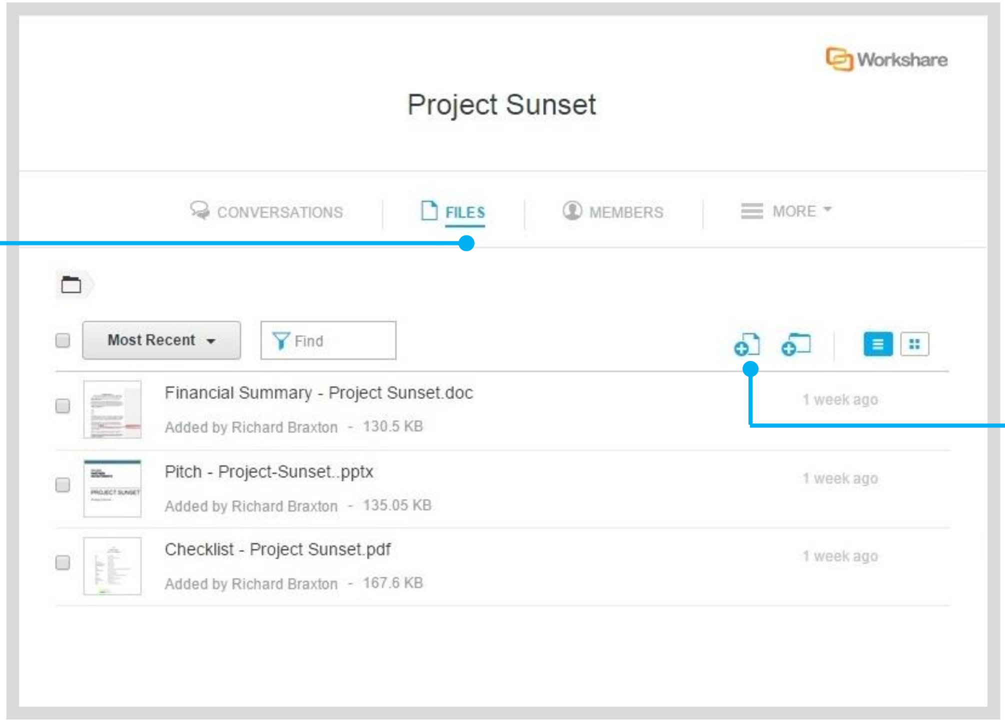


All your groups are here.

Add files to a group

When you first create a group, it will be empty. Add as many files as you like. The steps are similar to adding files to a folder.

To add files, first go to the **Files** area.

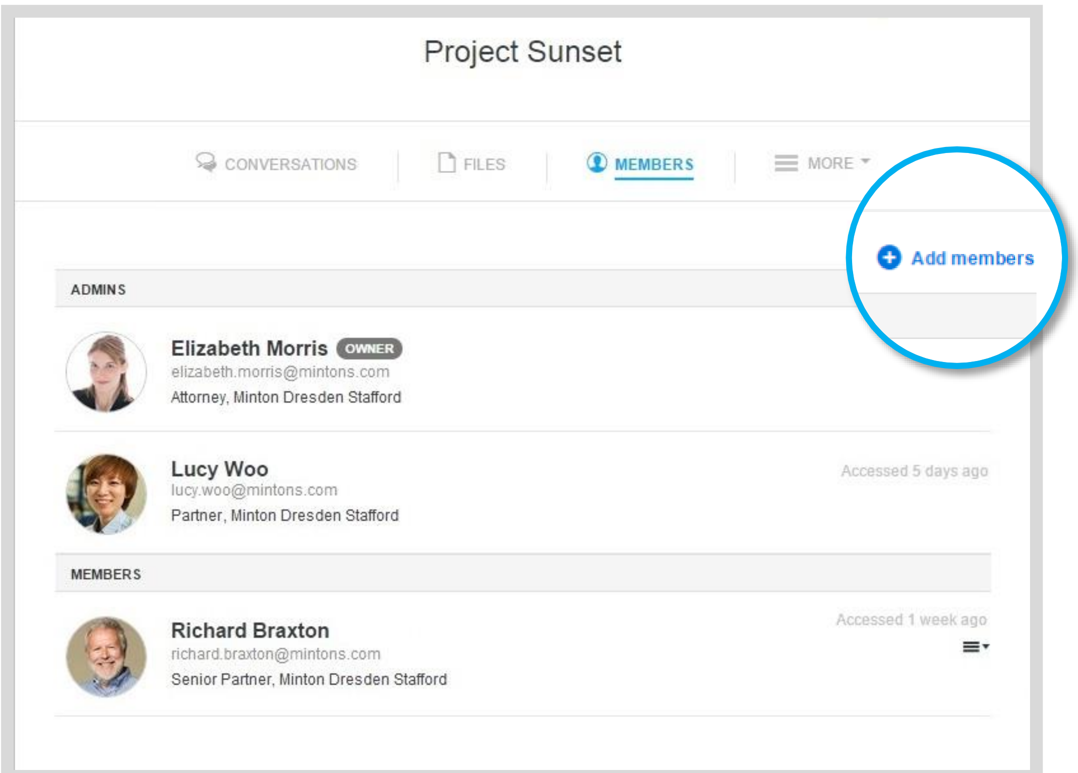


Click the **File** icon.

You can add files to any group you own. If a group has been shared with you, you can only add files if the settings enable you to do so.

Share a group

Once you've added files, you may want to share your group. People sharing a group are known as group **members**. They share all files and subfolders in the group. They're also are able to upload files, download files and add other members according to the group's permissions.



The steps to share a group are similar to sharing a folder.

To share a group, go to the **Members** area and click **Add Members.** Then type their email addresses and click **Add**. An email invitation will be sent with a link to the group.

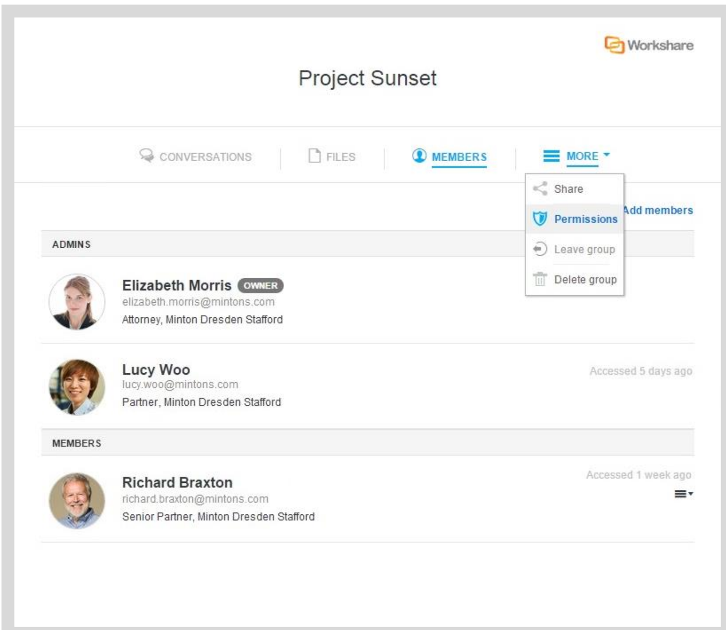
You'll notice that some people are **members** and some are **admins**. Admins have greater control over the group – there's more information about these permissions on the next page.

When a group is first created, the group owner is the only admin. They can promote members to admins as needed.

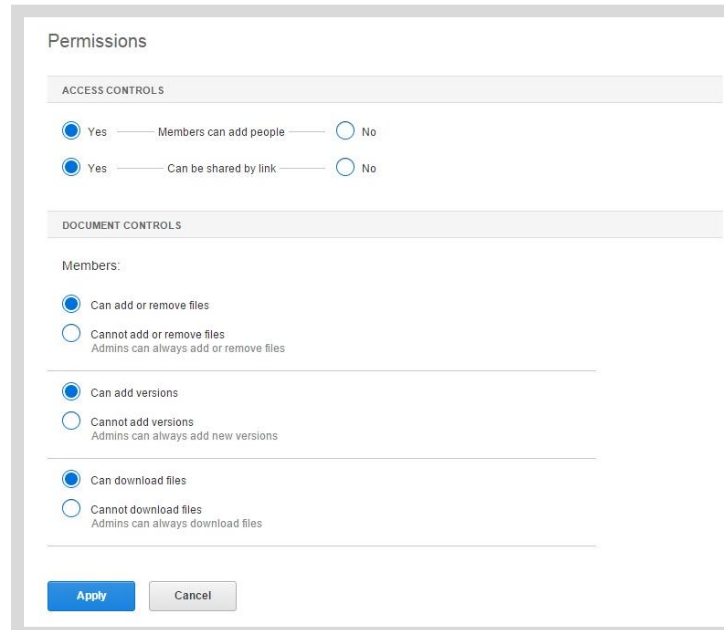
Share

Secure a group

You control what people can do with your documents and how they can be accessed by adjusting the group's permissions. The group's permissions apply to all **members** of the group. Group **admins** always have the right to add or remove files, add version and download files, regardless of the permissions set.



First, click **More** and select **Permissions**.

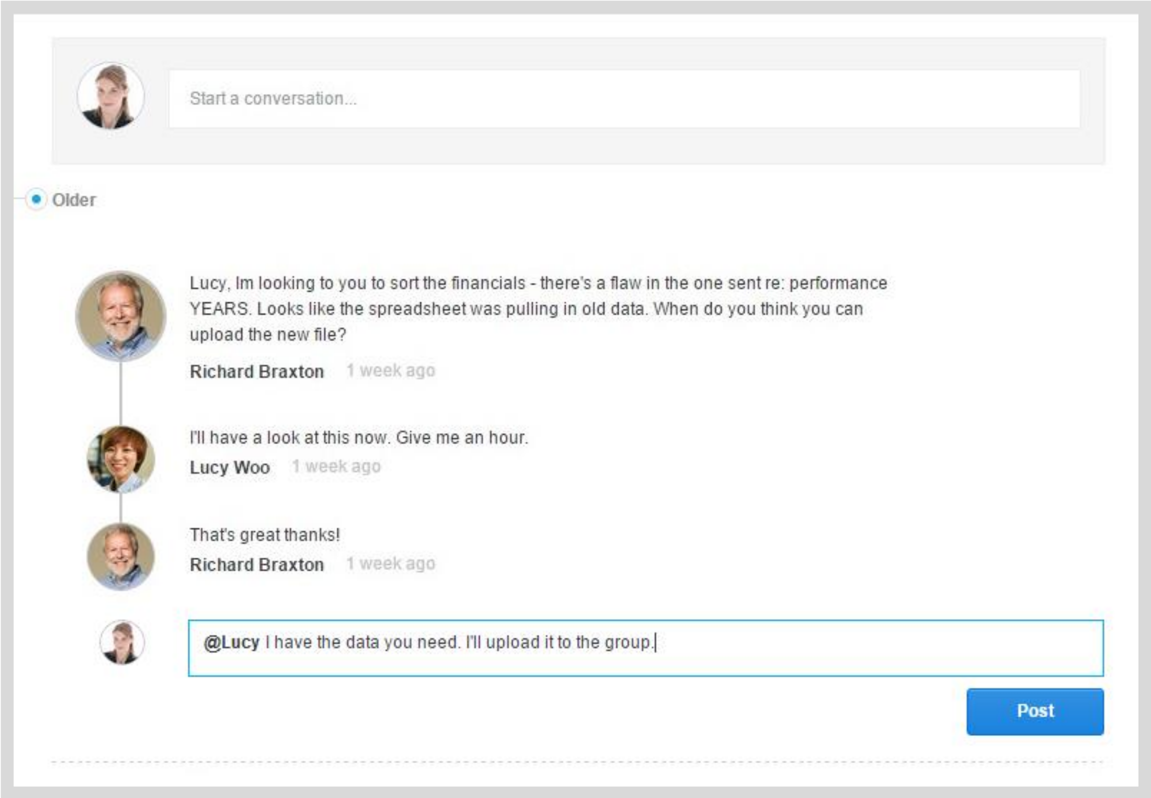


Adjust the access controls and document controls as needed and click **Apply.**

Share

Have group conversations

Anyone can post to the conversation to share an idea with the group. It's a great place to discuss how the work is going and understand what will happen next to the document. If you need to get someone's attention, just tag them with @ and they'll receive an email notification to let them know they've been tagged.



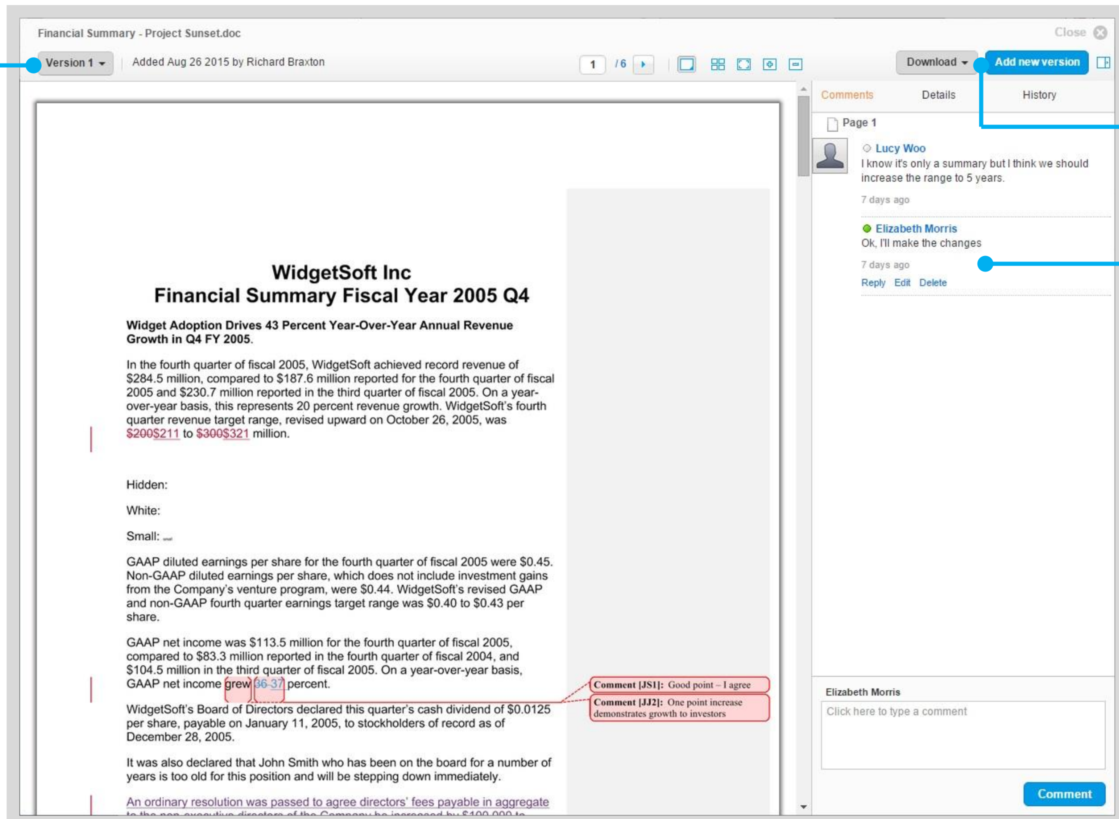
Collaborate

Make comments and reviews

Whether you've shared a document in a folder or a group, everyone can see the most recent version 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. People sharing your workspace will be notified about the update.



Mark your suggestions and reviews. If you want, you can even comment right on the page. People sharing your workspace are notified about your feedback.

Find out more

Knowledge base

For step-by-step instructions
to use these features

workshare.force.com/knowledgebase

Technical support

If you have any questions,
get in touch

workshare.com/support

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