

# Workshare Desktop App

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## User Guide

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# Chapter 1: Introducing the Workshare Desktop App

- [What is the Desktop App?](#)
- [Installing the Desktop App](#)
- [Getting Started with the Desktop App](#)

## What is the Desktop App?

The Workshare desktop app synchronizes your Workshare content to your Mac or PC. You can then use the app to enjoy all the benefits of Workshare from your desktop while offline or online, leaving you free to work from anywhere without compromising document security.

## Key features of the Workshare desktop app

The desktop app provides a window into your Workshare online content. Its key features are as follows:

- Synchronization – Synchronizes groups, files, folders, comments and more between Workshare and your desktop. Users can be selective about what is synchronized to reduce the storage footprint on their local machine. If users are working offline, as soon as they're back online, the new versions, comments, activities are uploaded right away.
- Collaboration – Enables users to view and edit files in their native applications and then save back to Workshare as new versions.
- Presence indicators and access notifications – Shows when collaborative parties are online, viewing or making changes in real-time, giving full insight into the collaboration as it progresses.
- Integration – Integrates Windows or Mac OS with the Workshare collaboration environment and links Workshare directly to everyday applications. Users can save files directly into their local Workshare sync folder from where they are synced to Workshare online.

The desktop app is installed as part of the Workshare Professional/Protect/Compare installation or you can log into Workshare on your browser and download it from the **Download Centre**.

## System requirements

The desktop app is certified against the following environments:

- Microsoft Windows 10 (x64)
- Microsoft Windows 7 (x86)
- Apple macOS Sierra

## Installing the Desktop App

The Workshare desktop app is included in the Workshare Professional/Protect/Compare install.

Additionally, the install file can be downloaded from the **Download Center** in Workshare. Click **Download** and the appropriate install file (for Mac or Windows) is downloaded.

### To install the desktop app in a Windows environment:

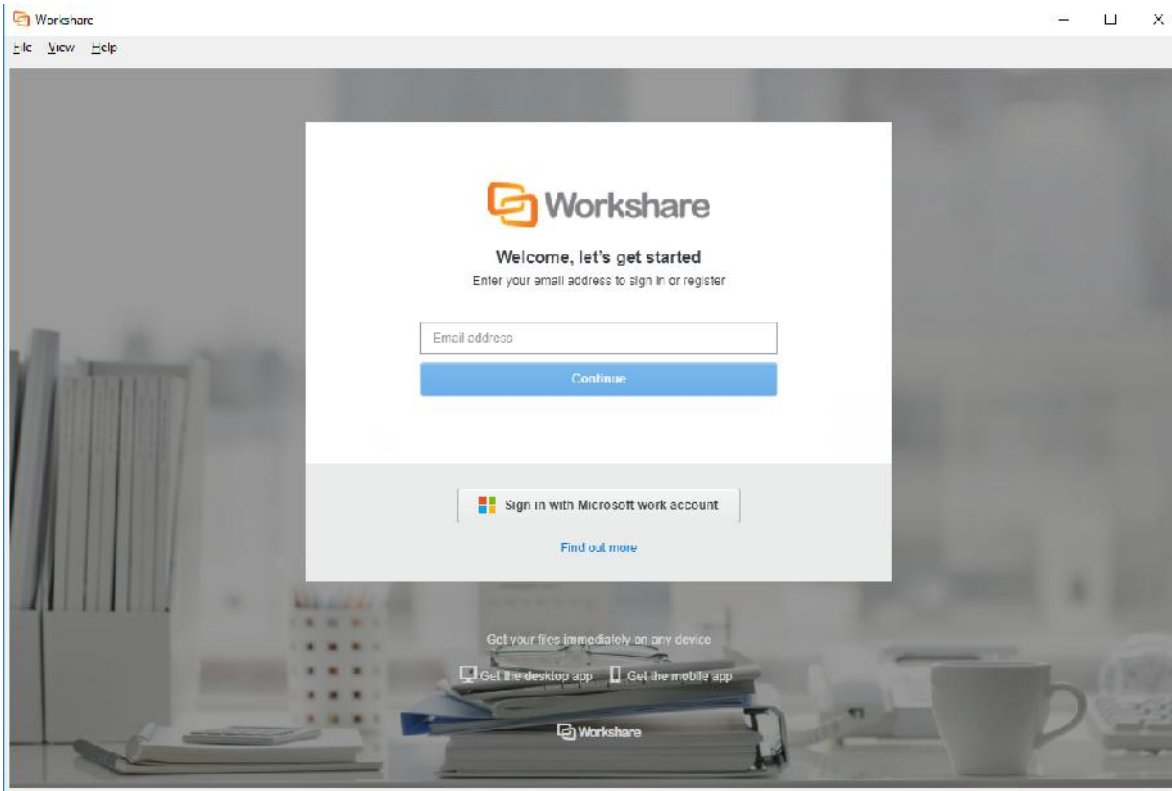
1. Double-click the Workshare.Desktop.Setup.exe file. The license agreement is displayed.
2. Select the **I agree to the license terms and conditions** checkbox and click **Install**. The desktop app is installed.
3. Click **Close**. The login window is displayed.

### To install the desktop app in a Mac environment:

1. Double-click the Workshare.dmg file.
2. Drag Workshare.app into the **Applications** folder. The desktop app is installed.
3. In Finder, click **Go > Applications**.
4. Double-click Workshare.app. The login window is displayed.

## Logging into the desktop app for the first time

In order to use the desktop app, you must have a Workshare account as you use your Workshare login credentials to log into the desktop app.



If the desktop app was installed as part of the Workshare Professional/Protect/Compare installation, your administrator will have set up a Workshare account for your company and you will have received a Workshare welcome email requesting you to validate your user account. (Simply click the link in the welcome email.)

Your administrator may have set up single sign-on (SSO) so that you can use your regular company credentials to log into Workshare.

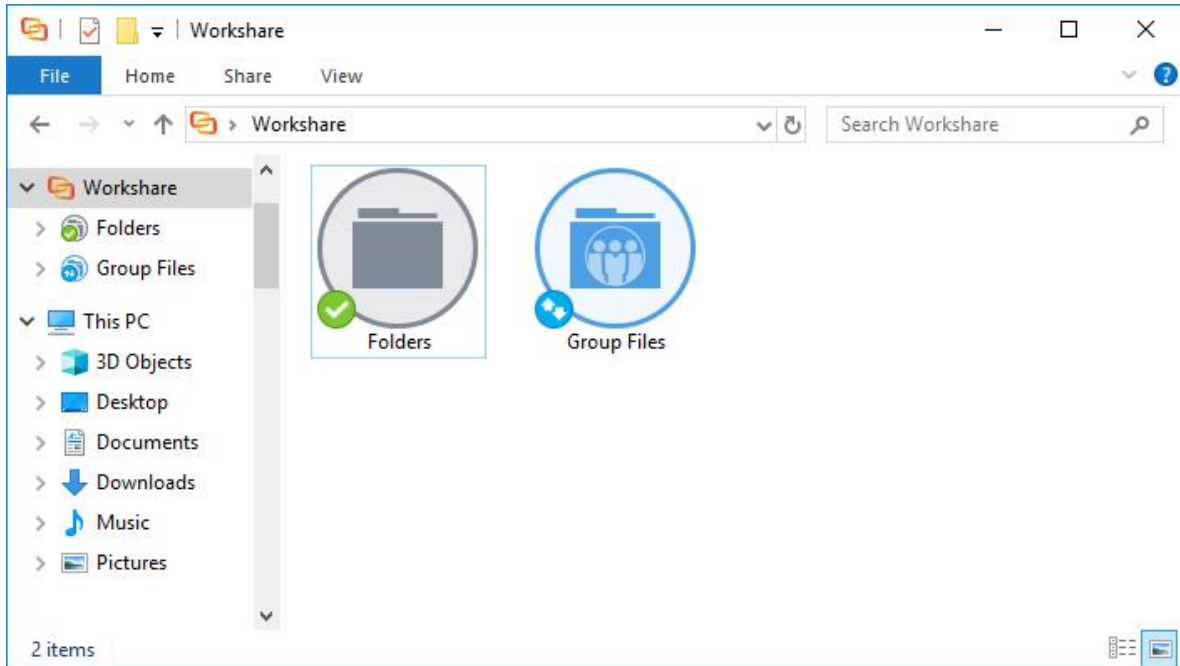
### To log into the desktop app:

- **Standard login:** Enter the email address and password you used to sign up for Workshare and click **Sign In**.
- **Single sign-on:** Enter your company email and click **Continue**. If SSO has been set up, enter your standard user name and password in the authentication dialog displayed. If SSO has not been set up, you can return to the Workshare login.

Once you have logged in, your Workshare files and folders start to synchronize to your desktop.

## Workshare sync folder

The Workshare sync folder is where your Workshare content is stored locally. It is displayed in File Explorer under Quick access (Windows 10) or Favorites (Windows 7 and 8) or in Finder under Favorites.



In your Workshare sync folder, you will see all your Workshare files and folders, grouped as follows:

- **Folders:** Includes all your shared files/folders as well as your private files/folders in the My Files subfolder.
- **Group Files:** Includes folders with the same names as the groups you're sharing in Workshare. In each group folder, you'll see the files and folders shared in the group.

If you add, update or delete a file in your Workshare sync folder, it will be added, updated or deleted in Workshare too. Similarly, if you add, update or delete a file in Workshare through the web app on a browser, the changes will be seen in the Workshare sync folder.

The Workshare sync folder is a local folder named and located, by default, as follows:

- Windows: C:\Users\[user name]\Workshare
- Mac: /Users/[user name]/Workshare

The icon to the left of a file/folder icon in Explorer/Finder indicates their sync status:



Waiting to be synchronized or synchronization is in progress



Synchronized

You can change the location of the Workshare sync folder in Preferences > Sync Settings, described on page 54. You can also change which Workshare files are synced to your desktop, described in [Selective Synchronization](#).

## Getting Started with the Desktop App

After the desktop app is installed, whether as part of the Workshare Professional/Protect/Compare installation or using the executable downloaded from Workshare, a shortcut is installed on your desktop (Windows) or in your dock (Mac).

### To open the desktop app:

- Windows: Double-click the desktop app shortcut on your desktop or from the Start menu, select **Workshare**.
- Mac: Click Workshare Connect for Desktop on the dock or in Finder, click **Applications > Workshare**.

The login page is displayed.

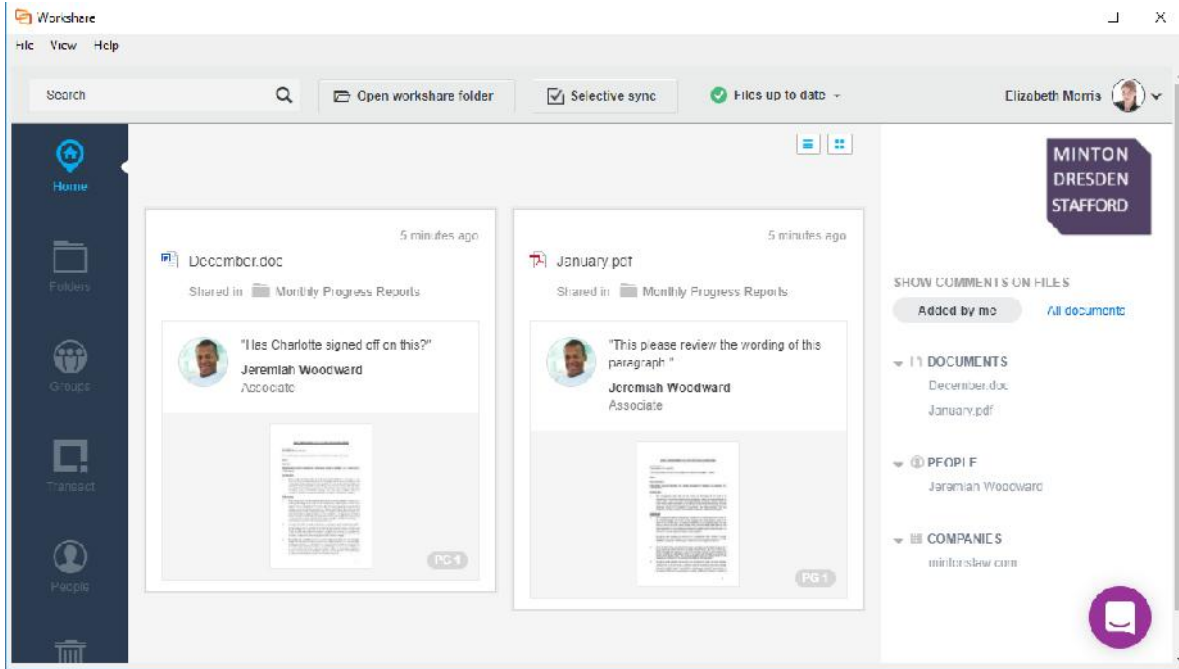
### To log into the desktop app:

- **Standard Login:** Enter the email address and password you used to sign up for Workshare and click **Log In**.
- **Single Sign-On:** Click the **Log in with your company credentials** link to see if SSO has been set up then enter your company email in the page displayed and click **Next**. If SSO has been set up, enter your standard user name and password in the authentication dialog displayed. If SSO has not been set up, you can return to the Login page.

The desktop app main window is displayed with the home page displayed.

## Workshare desktop home page

The desktop app home page shows notification cards which update you on any comments made on your shared files.



The desktop app window and menu options are described fully in [Appendix A: Quick Tour of the Workshare Desktop App](#).

## Chapter 2: Uploading Files

- [Adding Files](#)
- [Restoring Deleted Files](#)


# Adding Files

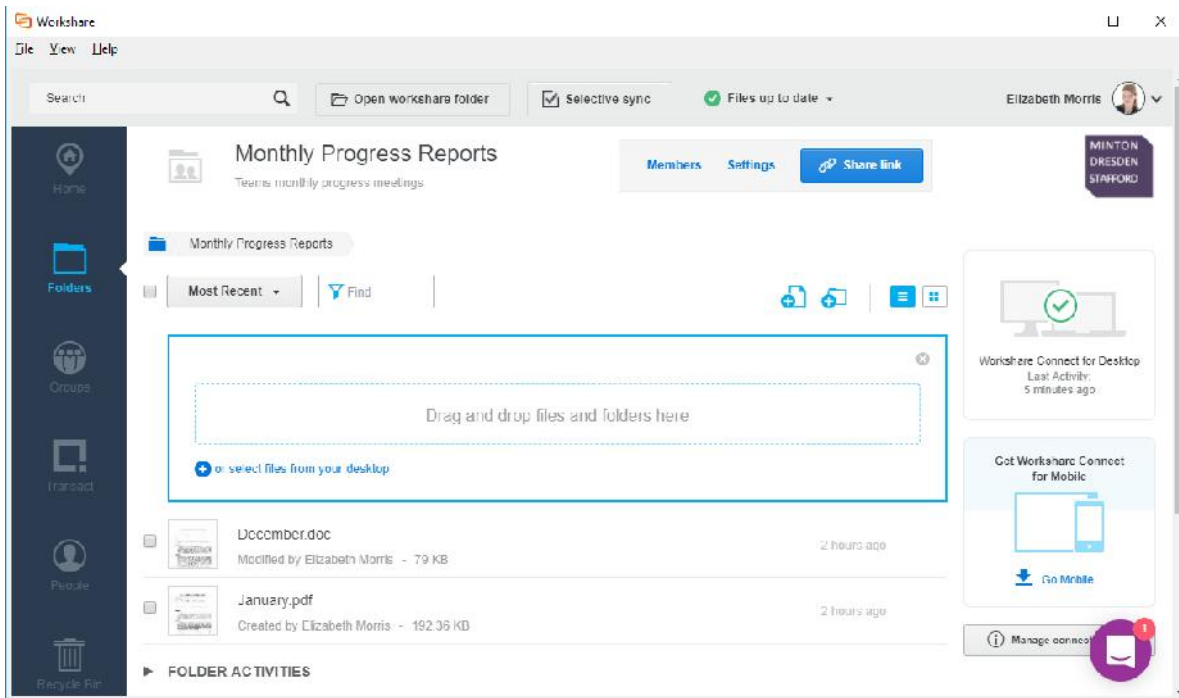
You work in the desktop app in the same way as you would through your browser. So you can add most file types to existing groups or folders, or create new groups and folders. If you add files via the desktop app, they will sync to Workshare online and you will be able to access or view the files from any device.

You can clean metadata from your files or convert them to PDF before you add them, making sure they are secure and safe.

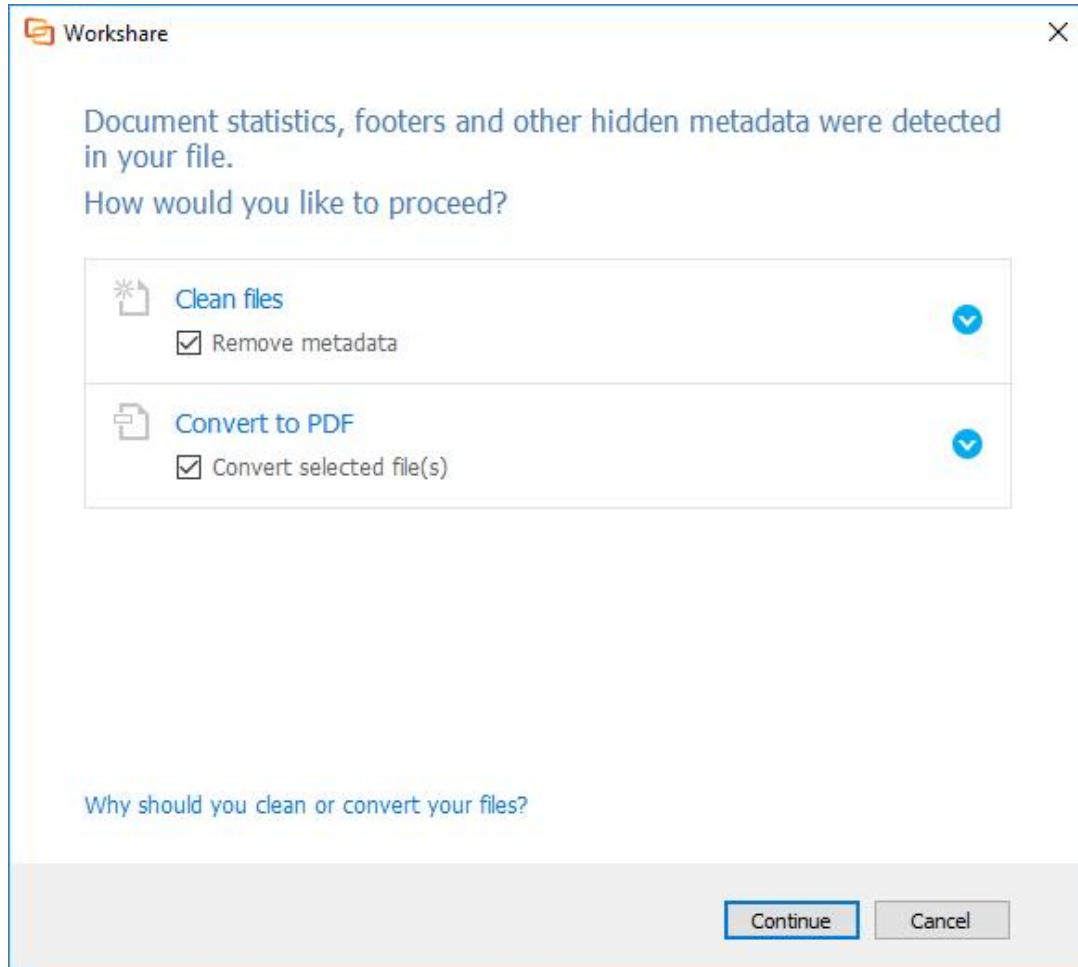
**Note:** Files added via the desktop app will be synchronized to Workshare online by default. However, if you have selected that specific folders do not synchronize then files added to those folders will not be synchronized.

## To add files via the desktop app:

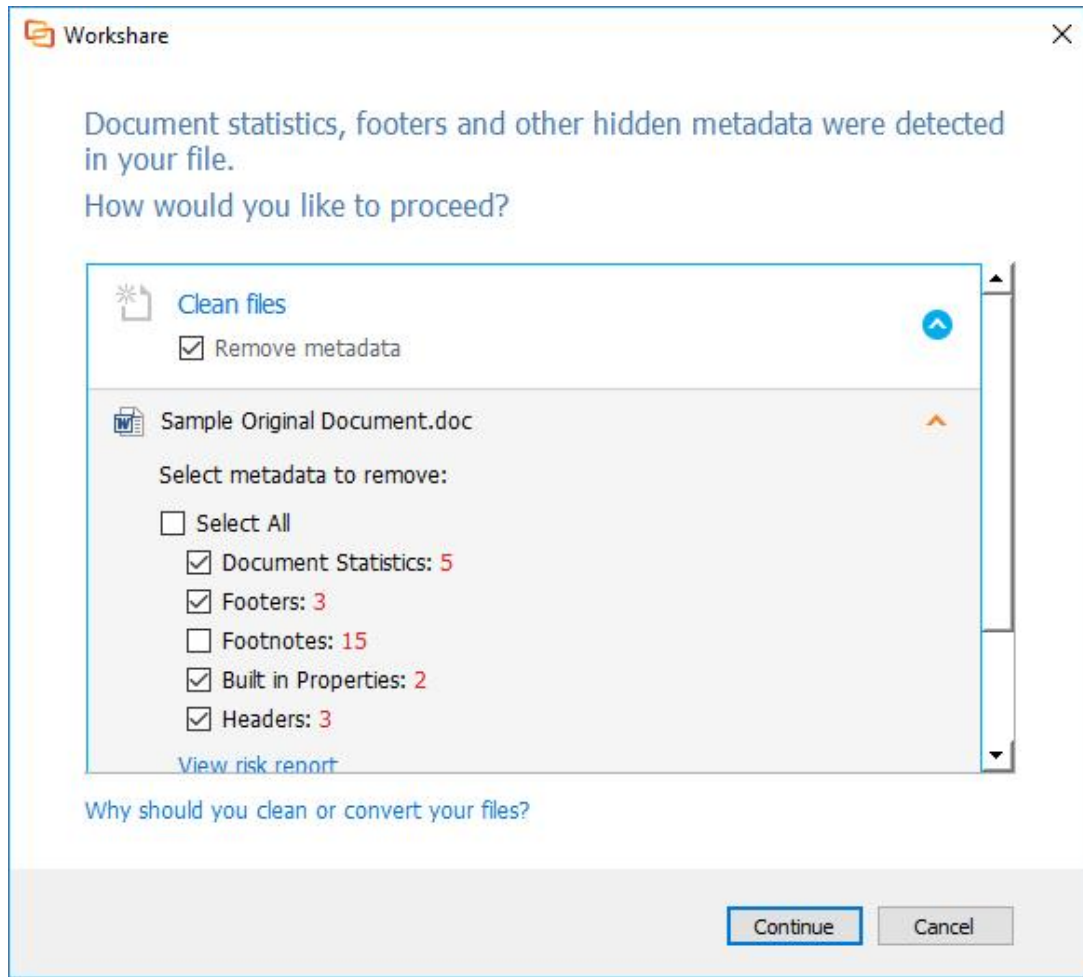
1. In the desktop app, browse to the folder where you want to add the files.
2. Click .



3. Drag and drop files from your desktop or Explorer/Finder or click **or select files from your desktop** and browse to the file or files you want to add. The following page is displayed.

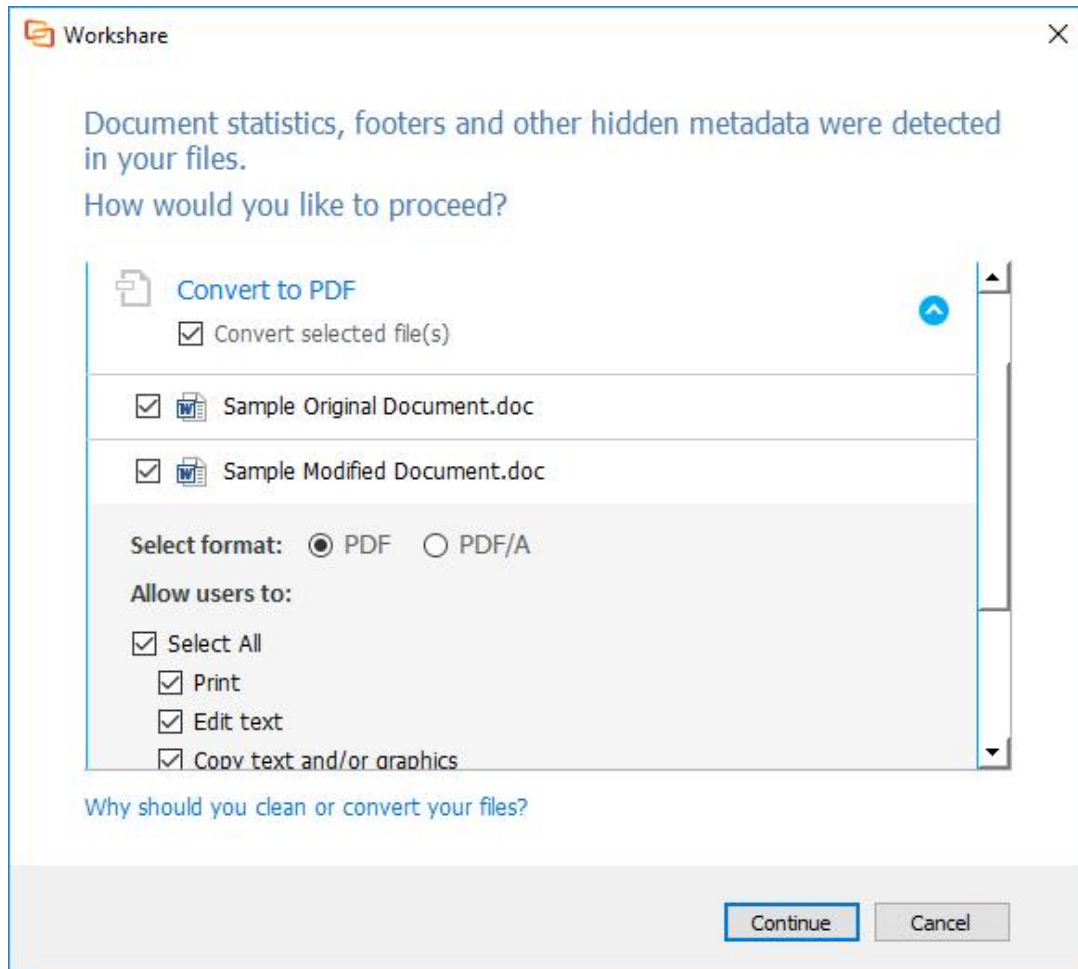


4. If you want to remove metadata from your files, leave the **Remove metadata** checkbox selected. To select specific metadata to remove from each file, expand the **Clean files** section and then expand each file.



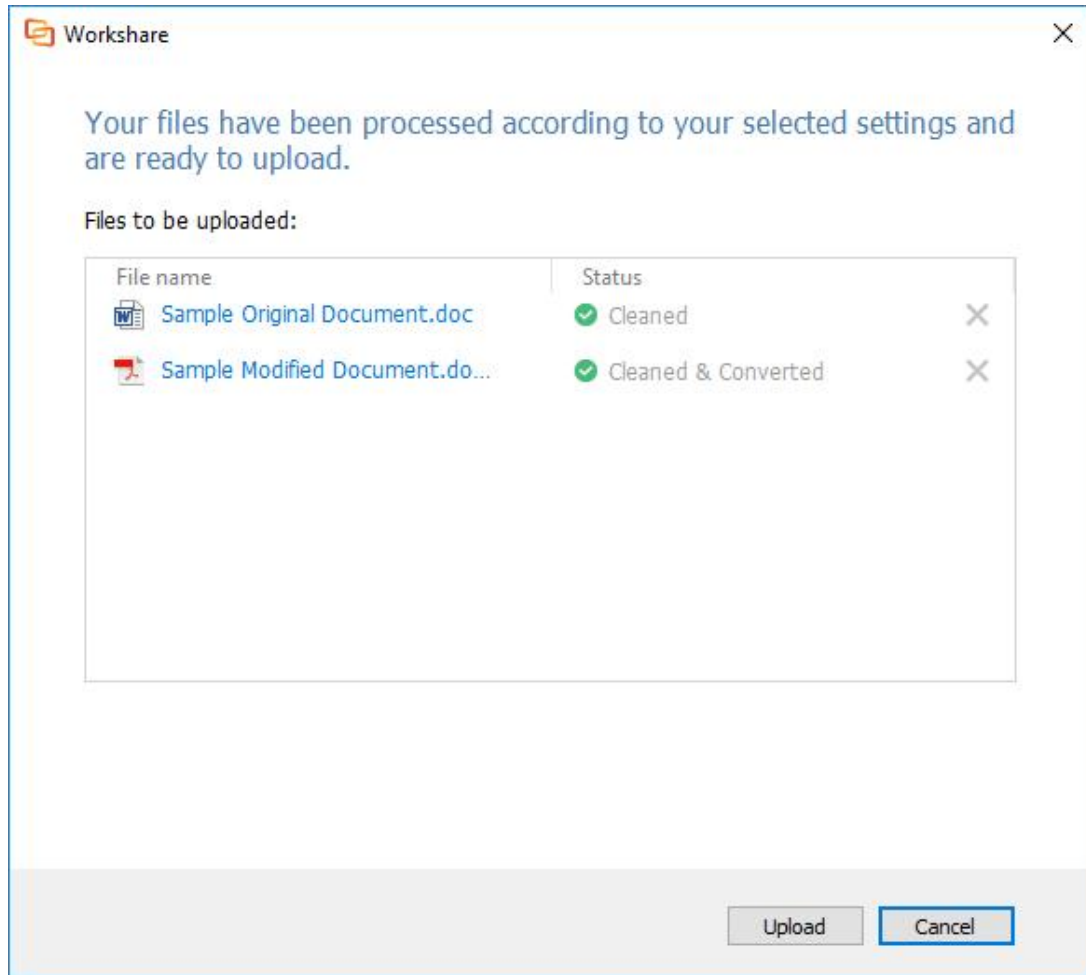
5. Select or deselect the specific metadata types. For example, you might want to remove all white text and document statistics but keep all fields.
6. Do this for all the files you are adding.

7. If you want to convert your files to PDF, leave the **Convert selected file(s)** checkbox selected. To convert only some of the files you are adding, expand the **Convert to PDF** section.



8. Deselect any of the files you don't want to convert to PDF.
9. Select whether you want to convert the files to **PDF** or **PDF/A**.
10. If you selected **PDF**, you can select one or more of the security options as required:
- **Print:** Enables recipients to print PDF files.
  - **Edit text:** Enables recipients with Adobe Acrobat Distiller to edit PDF files.
  - **Copy text and/or graphics:** Enables recipients to copy graphics or text directly from PDF files.
  - **Add comments:** Enables recipients with Adobe Acrobat Distiller to add comments to PDF files.
11. If you selected **PDF**, you can set a password to protect the PDF files by entering the password twice. When a password is specified, recipients can only open the PDF files after entering this password.

12. Click **Continue**. The file is cleaned and converted according to your selections.



**Tip!** You can click the file name to open it and see what it looks like cleaned and/or converted.

13. Click **Upload** and your file is uploaded to Workshare.

**Note:** In order for the file to upload to Workshare online, the selected folder must be set to synchronize.

## Adding files via the sync folder

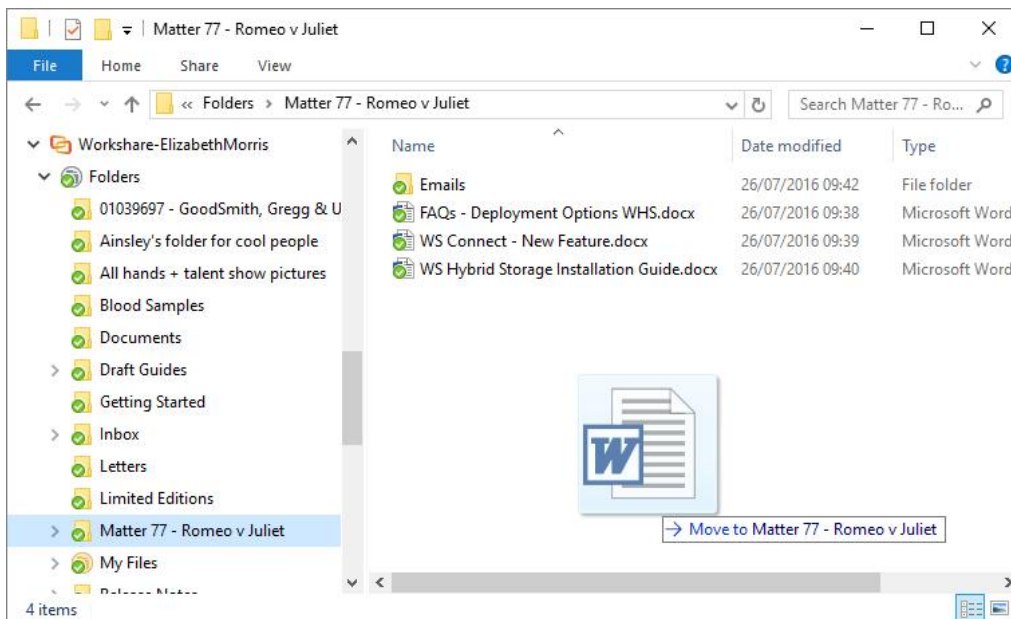
You can also add files to Workshare by simply copying or saving files into the Workshare sync folder. Any files or folders put in this folder will be synced to Workshare so you can access them via the desktop app, via a browser or via the mobile app.

If you have selected that specific folders do not synchronize then files added to those folders will not be synchronized.

If you want to clean metadata from your files or convert them to PDF, you must do so before adding them to the sync folder or use the Workshare desktop application to add them to Workshare.

### To copy/paste to the Workshare sync folder:

Drag the files or folders you want to add into your Workshare sync folder.



### To save files to the Workshare sync folder:

1. Open a file – this can be any file, for example, a Word file, a PowerPoint presentation or an image file.
2. Click **Save As**.
3. Browse to the **Workshare** sync folder in your Favorites. By default this folder is located at Users\[user name]\Workshare.
4. Browse to a location in Workshare and select an existing folder or create a new folder.
5. Click **Save**. Your file is now saved in the Workshare sync folder and it is immediately synchronized to Workshare (if the selected folder is set to synchronize).

## Restoring Deleted Files

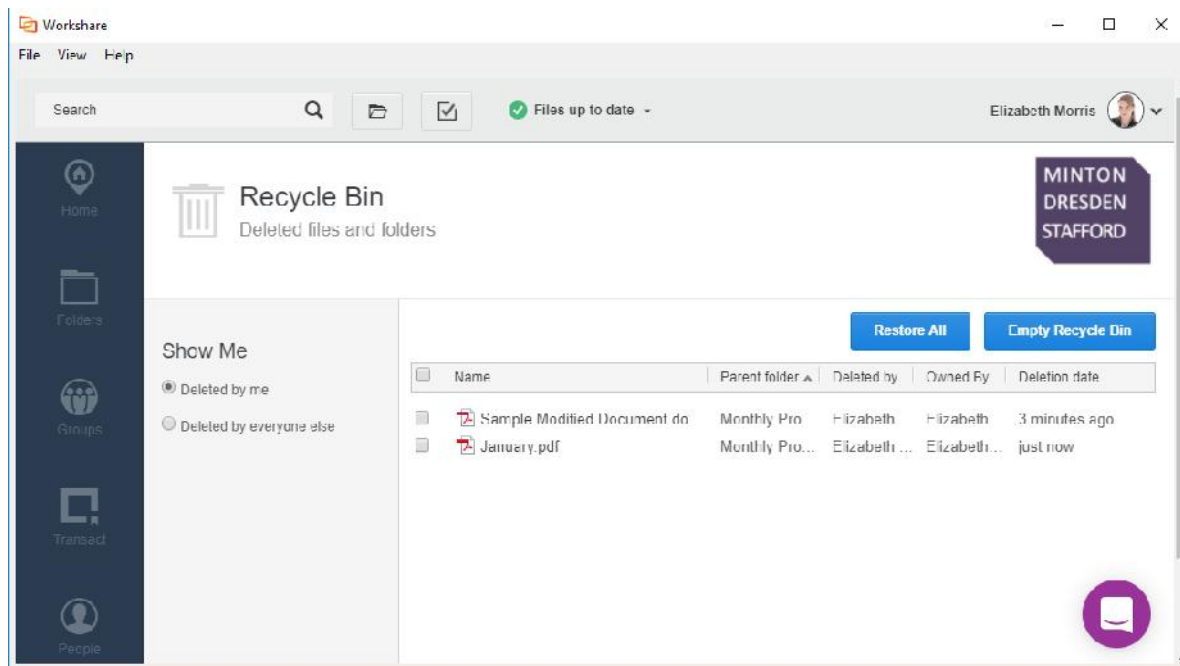
From the desktop app, you can access the Workshare recycle bin where you can restore any of your accidentally deleted files, folders or groups. The recycle bin lists all your Workshare files and folders (those you own) that have been deleted – you may have deleted them using a web browser, from the desktop app or directly from the Workshare sync folder.

**Note:** When you have deleted files and folders from the desktop app or the Workshare sync folder, you will only see the deleted files and folders in the recycle bin after synchronization.

The desktop app provides a window into the Workshare online recycle bin so if you are offline, you will not be able to access the recycle bin.

### To access the recycle bin:

Click **Recycle Bin** in the left panel.



In the recycle bin you can see:

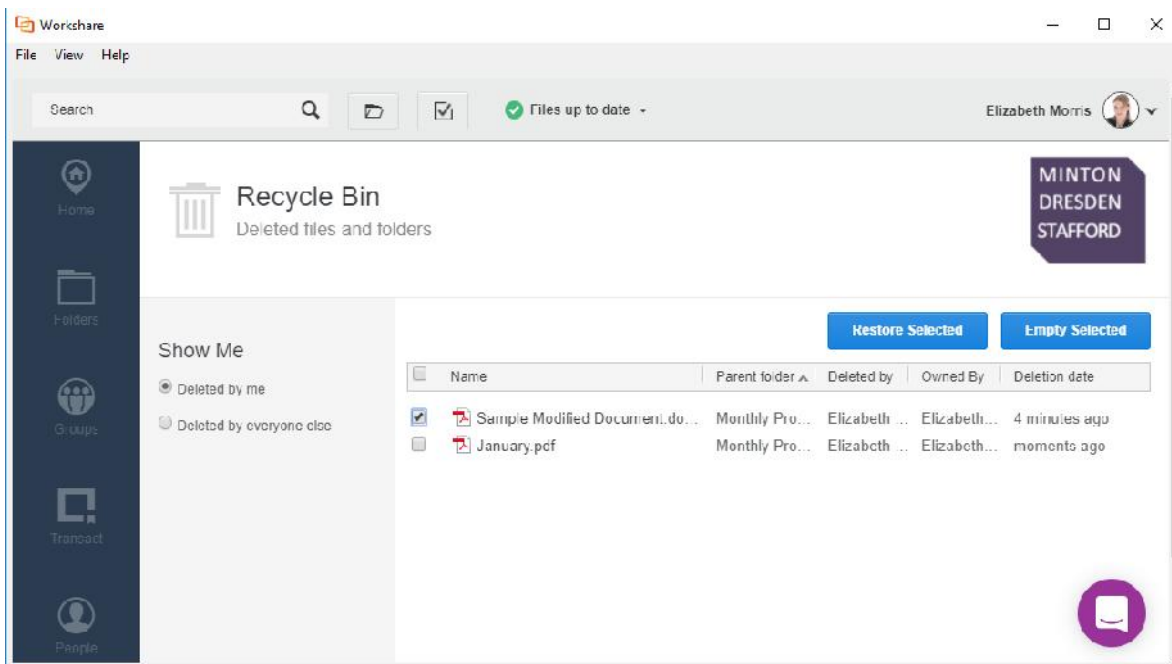
- Files, folders and groups owned by you that have been deleted by anyone; and
- Files, folders and groups owned by anyone that have been deleted by you.

. You can filter the list to see what was deleted by you and what was deleted by others.

- Click **Restore All** to restore all files and folders in the recycle bin back to their original location.
- Click **Empty Recycle Bin** to permanently delete all files and folders in the recycle bin.

#### To restore selected files:

1. Click **Recycle Bin** in the left panel.
2. Select a file or a folder (or several files and folders). The buttons change to **Restore Selected** and **Empty Selected**.



3. Click **Restore Selected** to restore the selected folders and files.

## Chapter 3: File Synchronization

- [Default Synchronization](#)
- [Selective Synchronization](#)
- [Synchronization Conflict](#)

## Default Synchronization

By default, the following files are synchronized between the desktop app and Workshare online.

- Files you add to My Files
- Files you add to a shared folder or a group that you own
- Files others add to a shared folder or a group that you own

So if you add any of these files to Workshare via a web browser, they will be synced to your desktop and you will be able to access them from the Workshare desktop app (or sync folder). Synchronization works both ways so if you delete any of these files from the Workshare desktop app (or sync folder), they will be deleted from Workshare online and you will no longer be able to access them via a web browser.

Synchronization between your desktop and Workshare online occurs in the following situations:

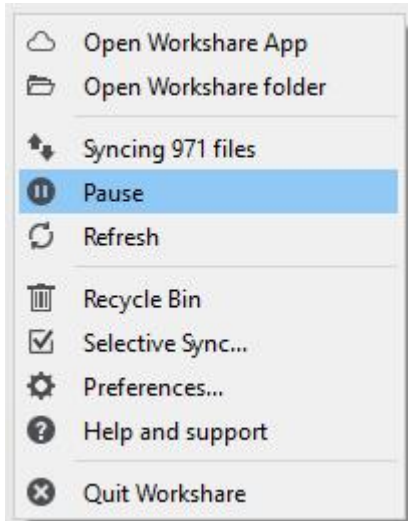
- When logging into the desktop app
- When a new event occurs on Workshare online, such as a new file uploaded or a new version added
- When a new event occurs in the Workshare desktop app (or sync folder), such as a new folder created or a file added
- When the desktop app has been offline and then you go back online
- When clicking **Refresh** in the desktop app
- When clicking **Update and Sync** in the Selective Sync page

## Pausing Synchronization

You can pause the sync process at any time, for example, if you have a slow connection, and then restart it when convenient. When paused, no synchronization occurs between your desktop and Workshare online.

**To pause synchronization:**

Click the desktop app system tray icon and select **Pause** from the menu displayed. Synchronization stops.



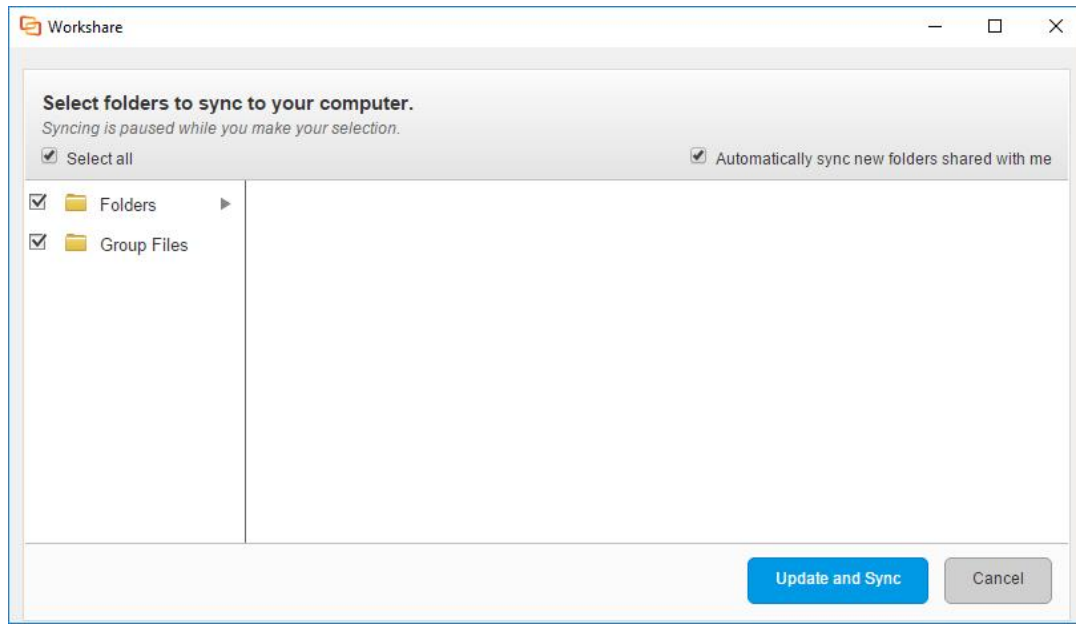
To restart synchronization, click the desktop app system tray icon and select **Resume**.

## Selective Synchronization

You can modify the default synchronization settings so that fewer files and folders are synchronized to your desktop in order to reduce the storage footprint on your local machine.

### To select folders to synchronize:

1. Click the desktop app system tray icon and select **Selective Sync** or from the *File* menu in the desktop app main window, select **Selective Sync**. The selective sync page is displayed showing the root folders on Workshare – **Folders** and **Group Files**.



**Note:** *Syncing is paused while you make your selection.*

2. Click a folder to display its subfolders.
3. Select the folders that you want to synchronize between Workshare and your desktop by selecting the checkbox to the left of the folder/subfolder name. Selecting or deselecting a folder will automatically select/deselect the subfolders belonging to the folder. However, you can select a folder but then manually deselect some of its subfolders. Use the **Select All** checkbox to quickly select/deselect all folders.

**Note:** *By default when a folder or group is shared with you it is selected for synchronization. To change this, deselect the **Automatically sync new folders shared with me** checkbox.*

4. Click **Update and Sync**. All folders with a selected checkbox will be synchronized. The progress of the synchronization is shown in the desktop app status bar and in the sync progress page.

## Checking sync progress

The sync progress page shows the folders and files currently being synchronized.

### To display the sync progress page:

When synchronization is in progress, select **Sync Progress** from the View menu.

Name	Folder	Size	Progress	Last Updated By
ShutdownService.html	server	10 KB	100% Download Completed	Michael Ward
SMTPMessage.html	class-use	10 KB	100% Download Completed	Michael Ward
package-use.html	general	9 KB	100% Download Completed	Michael Ward
SynergyDemo.html	Synergy	9 KB	100% Download Completed	Michael Ward
SynergyDemo.html	Synergy	9 KB	100% Download Completed	Michael Ward
InvalidAddressException.html	class-use	9 KB	100% Download Completed	Michael Ward
help-doc.html	apidocs	9 KB	100% Download Completed	Michael Ward
Message.html	class-use	8 KB	100% Download Completed	Michael Ward
WorkshareInstall.exe	WP4 SR-1 Build 8147	60 MB	67% Downloading	Michael Ward
WorkshareInterwoven.exe	8177	57 MB	20% Downloading	Michael Ward
WorkshareInstall.exe	Workshare 4 - RC1	57 MB	0% Waiting to sync	Michael Ward
WorkshareLondonSymbols.msi	Build 6711	50 MB	0% Waiting to sync	Michael Ward
WorkshareLondonSymbols.msi	Build 6702	50 MB	0% Waiting to sync	Michael Ward

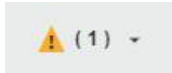
Syncing - 827 files remaining

The status bar provides a summary of the sync situation and the sync progress report provides a detailed view.

The files being synchronized are shown in a queue format. If you want to move a file in the queue, for example, you want to upload a small Word document and it is being held up by a large PowerPoint presentation, right-click the file you want to delay and select **Lower the sync priority**.

## Synchronization Conflict

When there are sync conflicts between the desktop app and Workshare, you can see this in the notification at the top of the desktop app window as well as in the desktop app system tray icon.



Notification



System tray icon

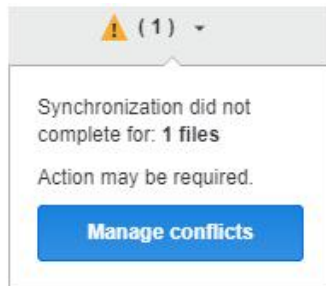
Possible conflict scenarios include:

- You have opened a file from the Workshare sync folder on your desktop and you are editing it. Meanwhile, in Workshare a new version is added to the file. When you save the open file, a conflict is shown.
- Two users are working offline in the desktop app and make changes to a file they share. User 1 goes back online and the revised file is synced to Workshare as a new version. User 2 goes back online and a conflict is shown.

**Note:** In both scenarios, the file in conflict is still uploaded but is shown in red until you resolve the conflict.


### To resolve a sync conflict:

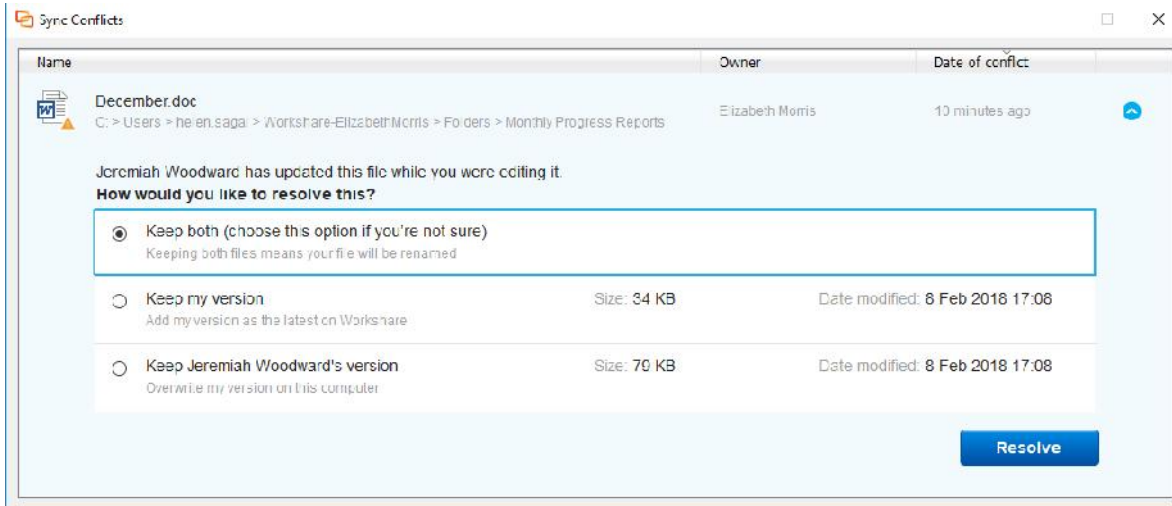
1. Click the arrow in the conflict notification.



2. Click **Manage conflicts**.

**Note:** You can also click the desktop app system tray icon and select **Conflicts** from the options displayed.

- Expand a file in the sync conflicts page by clicking . The options for resolving the conflict are displayed. For example, you may want to add your file as the latest version or overwrite your version with the online version. You can always opt to keep both files involved in the conflict. Different options are displayed according to the particular conflict.



- Select the option you want to apply and click **Resolve**.

**Note:** When there are no conflicts, the sync conflicts page is not available.

## Chapter 4: Sharing Files Securely

- [Sharing from the Desktop App](#)
- [Sharing via the Sync Folder](#)
- [Controlling Access to your Files](#)

## Sharing from the Desktop App

It is useful to organize files into folders and you can create folders and subfolders in Workshare via the desktop app as required. This is not only for organizational purposes - folders give you the ability to share and collaborate on files online. You share folders with other users and set access permissions for folders which are applied to all files and subfolders within that folder.

When you share a folder with a user, you are in effect inviting that user to collaborate on the files within the folder. That user becomes a “member” of the folder. All members can access the folder and its contents in Workshare according to the permissions you set for the folder.

Sharing a Workshare folder can be done from a browser or from the Workshare desktop app. The end result is the same – the shared folder becomes a collaboration workspace.

You can also share folders in dynamic groups where you can have conversations about your collaboration.

You may have an existing folder that already has files in it that you want to share or you may have an empty folder that you want to add files to and then share or you may have already shared a folder but want to add further members.

Sharing folders, files and groups works as follows:

- **Folders:** When you share a folder, users become members of the folder and can access all files in that folder. You can add additional members to subfolders who will have access to files in the subfolder but not to files in the parent folder.
- **Groups:** When you share a group, users become members of the entire group and they can access all files and folders in the group.
- **Files:** When you share a file, users become members of the folder that contains the file. Users can therefore access all other files in the folder. If the file is in a group, users can access all files and folders in the group.

The following tables outline the different ways to share from the desktop app:

Share a folder	
What you do...	What you'll see...
In Folders, open any folder and click the <b>Share Link</b> button.	<i>A new email message</i> You can send this email to anyone; the link to the selected folder is in the body of the email which is from you. Once the recipient clicks the link, they become a member of the folder. Refer to <a href="#">Emailing links to shared folders</a> .

Share a folder	
In Folders, open any folder, except those in My Files, and click the <b>Members</b> button.	<i>The Folder members dialog</i> You add members by email address; they receive an email from Workshare with a link to the selected folder and the folder is shared with them. Refer to <a href="#">Adding members to shared folders</a> .
In Folders or Groups, select a folder's checkbox and click the <b>Copy Link</b> button displayed, or click the folder's dropdown menu and select <b>Copy link</b> .	<i>The Copy link dialog</i> You can copy the link to the folder and paste it anywhere. Refer to <a href="#">Copying links to shared folders</a> .

Share a group	
What you do...	What you'll see...
In Groups, click the <b>Members</b> tab.	<i>The Members page</i> You add members by email address; they receive an email from Workshare with a link to the selected group and the group is shared with them. Refer to <a href="#">Adding members to groups</a> .
In Groups, open any group and click <b>More</b> then <b>Share</b> .	<i>The Share group dialog</i> You can copy the link to the group and paste it anywhere. Refer to <a href="#">Copying links to groups</a> .

Share a file	
What you do...	What you'll see...
In Folders or Groups, select a file's checkbox and click the <b>Share</b> button displayed, or click the file's dropdown menu and select <b>Share to group</b> .	<i>The Share to group dialog</i> You can copy the file into an existing group or a new group. Refer to <a href="#">Sharing files to groups</a> .
In Folders or Groups, select a file's checkbox and click the <b>Copy Link</b> button displayed, or click the file's dropdown menu and select <b>Copy link</b> .	<i>The Copy link dialog</i> You can copy the link to the file and paste it anywhere. Refer to <a href="#">Copying links to shared files</a> .

## Emailing links to shared folders

Using this method to share folders, you send a personal email to the people you want to share with that includes a link to the folder.

### To email a link:

1. In Folders, open the folder you want to share and click **Share Link**. An email message window is opened with a link to the selected folder in the email body.
2. Enter the email addresses of the people you want to share with and complete your email in the normal way.
3. Click **Send**.

The recipients receive an email from you personally. Once they click the link, they become a member of the folder.

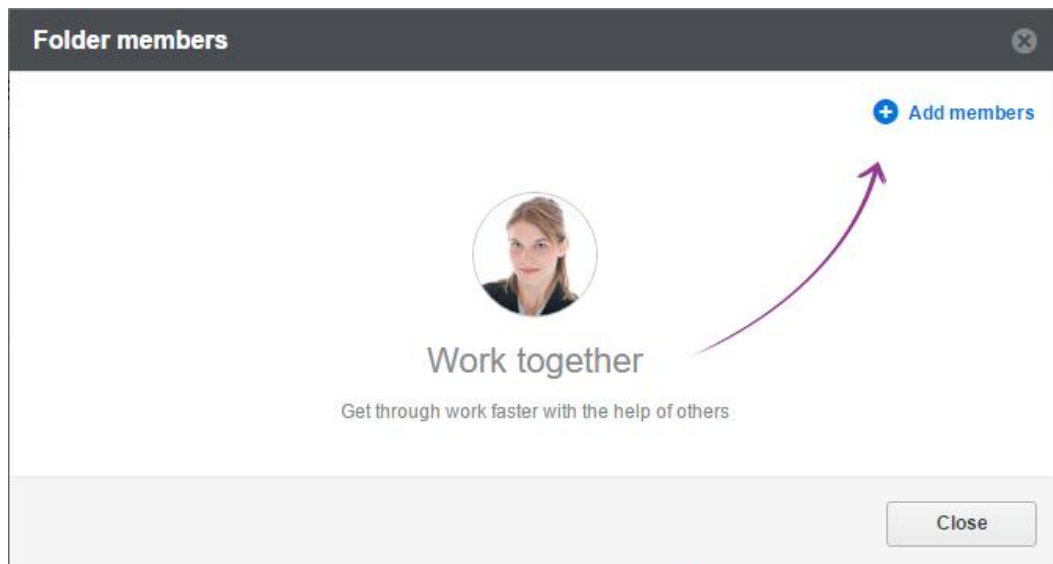
## Adding members to shared folders

Using this method to share, you add people as members of your folder which means they can access the folder and its contents in Workshare.

### To add members to a folder:

1. In Folders, open the folder you want to share.
2. Click **Members**.

**Note:** You cannot share folders in My Files.



If the folder is already shared, its members are listed here.

3. Click **Add members**.
4. Enter the email addresses of the people you want to share with and click **Add**. The recipients become members immediately and receive an email from Workshare with a link to your folder.

You can use the dropdown menu next to each member to resend them an email with a link to the folder, to remove them as members or to give them admin rights.

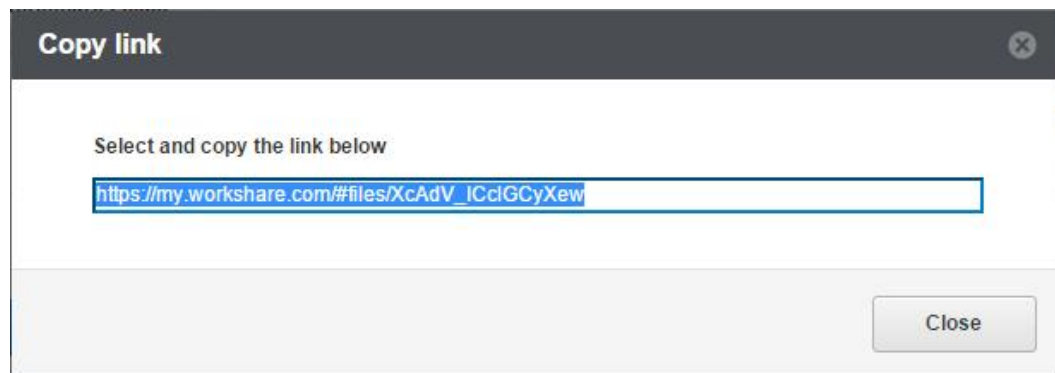
**Note:** *With admin rights, a member can remove people from the folder, change the permissions, and make other people admins. By default, the creator of the folder is an admin and others are members.*

## Copying links to shared folders

Using this method to share folders, you send a link to the folder in a way best suited to you, for example, via a messaging app.

### To copy a link:

1. In Folders or Groups, select a folder's checkbox and click **Copy Link**, or click the folder's dropdown menu and select **Copy link**.



2. Paste the link into your preferred sharing tool, for example, a messaging app, an email, a document.

Recipients will become members of the folder once they click the link.

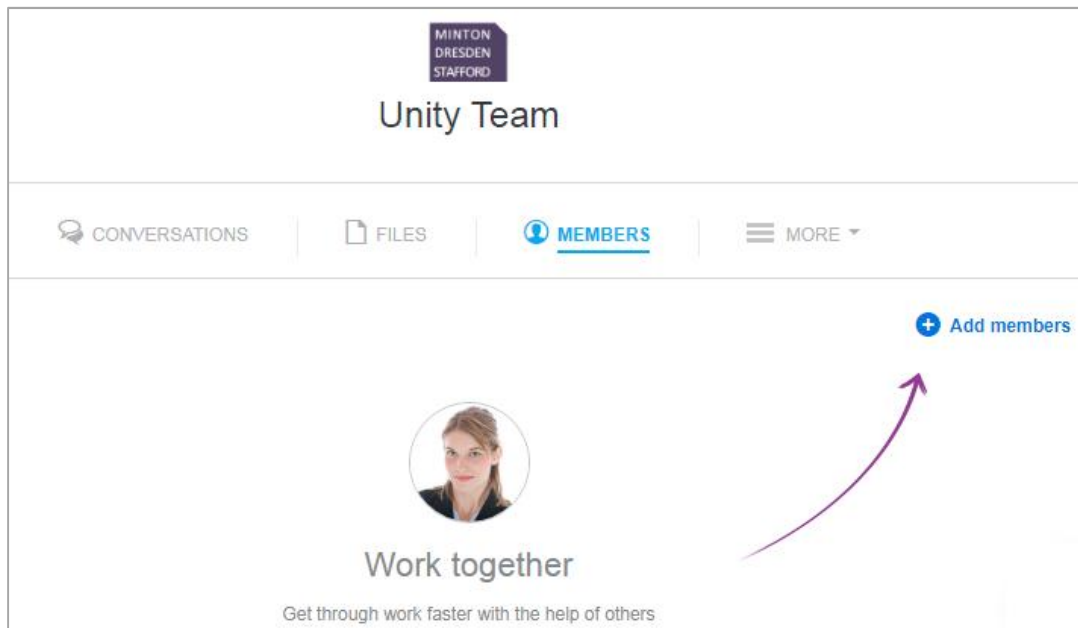
**Note:** *Recipients only become members once they sign in to Workshare. If the permissions for the folder allow access without signing in, the recipient can view a file and will not be added as a folder member.*

## Adding members to groups

Using this method to share, you add people as members to a group. Members of a group can access all folders within the group.

### To add members to a group:

1. In Groups, browse to the group you want to share.
2. Click the **Members** tab.



If the group is already shared, its members are listed here.

3. Click **Add members**.
4. Enter the email addresses of the people you want to share with and click **Add**. The recipients become members immediately and receive an email from Workshare with a link to your group.

You can use the dropdown menu next to each member to resend them an email with a link to the group or to remove them as members or to give them admin rights.

**Note:** *With admin rights, a member can remove people from the group, change the permissions, and make other people admins. By default, the creator of the group is an admin and others are members.*

## The @ mention

You can also add your colleagues to a group by “mentioning” them in the **Conversations** tab. Mentioning is used in a conversation to get someone's attention. The person you mention will be sent an email to let them know you posted. To mention someone in a conversation, type @ and then the person's name. If they're not a member of the group, you'll be asked if you'd like to add them to the group. If you decide not to add them, their name will still appear in the post but they won't be added to the group or receive an email about the post.

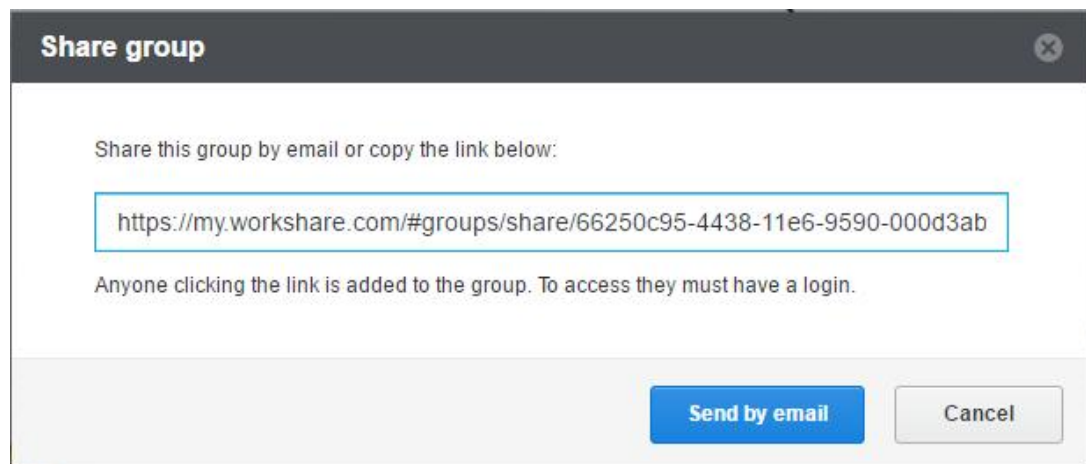
You can only mention someone if they're a member of your company and they're using Workshare. To find out who's using Workshare at your company, check the **People** page.

## Copying links to groups

Using this method to share, you send a link to add further members to a group. This is done at any time after the group has been created and enables the group to be a flexible collaboration that can adapt to new members.

### To send a link to a group:

1. In Groups, open any group and click **More** then **Share**.



2. Share the link to the group as follows:
  - Copy the link and paste the link into your preferred sharing tool, for example, a messaging app, an email, a document.
  - Click **Send by email**. An email message window is opened with a link to the selected group in the email body. Enter the email addresses of the people you want to share with and complete your email in the normal way. Click **Send**. The recipients receive an email from you personally.

Recipients will become members of the group once they click the link.

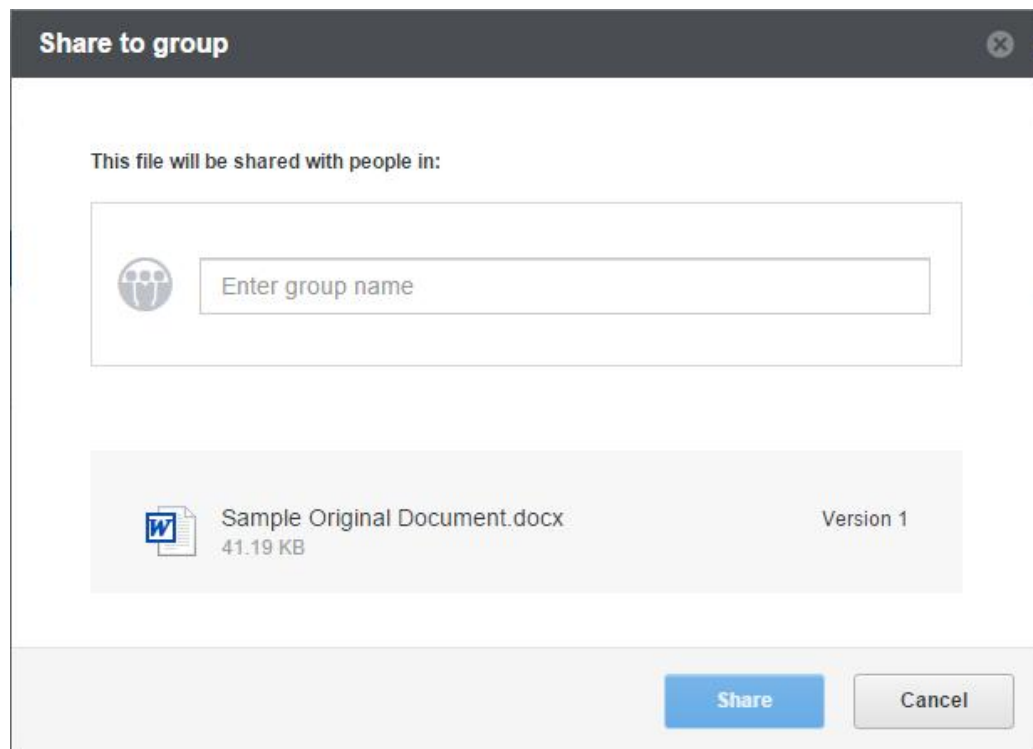
**Note:** Recipients only become members once they sign in to Workshare. If the permissions for the group allow access to the file without signing in, the recipient can view the file and will not be added as a member.

## Sharing files to groups

Using this method to share, you copy a file into a group and members of the group can access it.

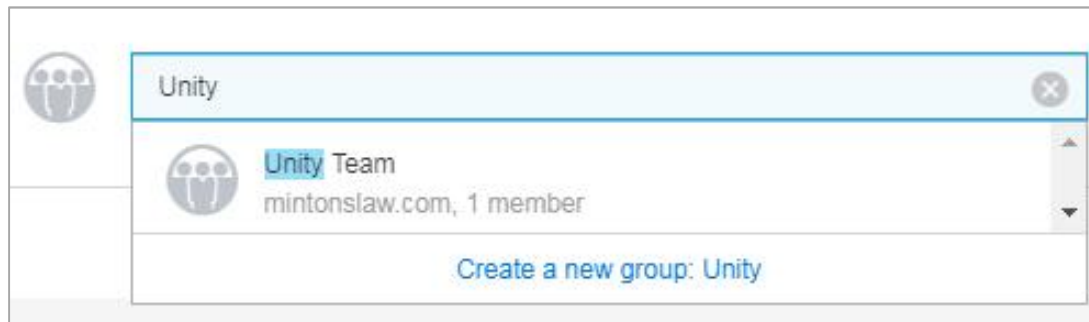
### To share to a group:

1. In Folders or Groups, select a file's checkbox and click **Share** or click the file's dropdown menu and select **Share to group**.

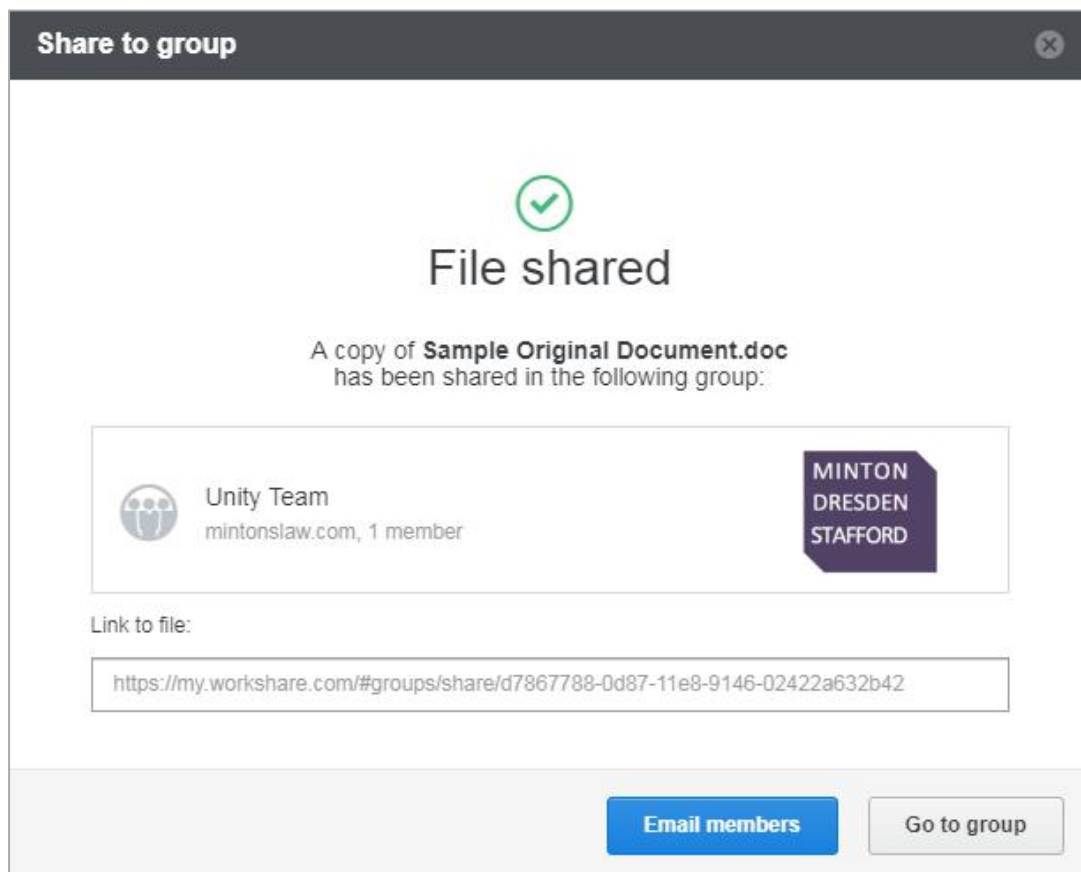


**Note:** If you have Workshare Professional/Compare/Protect installed with the Connect element enabled, you can also right-click any file in your Workshare sync folder and select **Workshare/Send to Group**.

2. Enter an existing group or create a new group. As you type, names of existing groups are suggested to you. Select an existing group or click **Create a new group**.



3. Once you have selected the group, click **Share**. The file is copied into the selected group and members can access it.



If you want to communicate with members of the group, you can:

- Copy the link to the file (triple-click it) and paste it anywhere.
- Click **Email members**. An email message window is opened with the members' email addresses in the **To** field and a link to the selected folder in the email body. Add further information to the email if required and click **Send**.

**Note:** You can add further email addresses to add more members to the group.

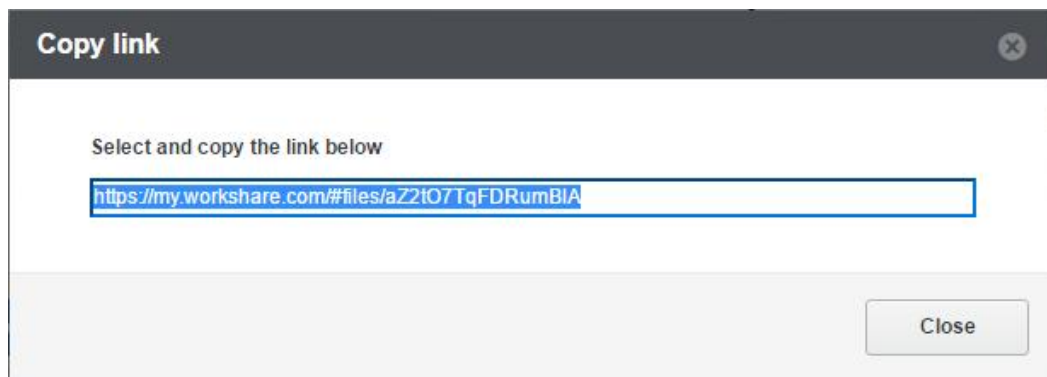
Click **Go to group** to open the group in Workshare.

## Copying links to shared files

Using this method to share files, the person you share with does NOT become a member of the folder where the file is located. This is useful for sharing a file when there is no need for collaboration.

### To copy a link:

1. In Folders or Groups, select a file's checkbox and click **Copy Link**, or click the file's dropdown menu and select **Copy link**.



2. Paste the link into your preferred sharing tool, for example, a messaging app, an email, a document.

Recipients will NOT become members of the file's folder once they click the link.

## Sharing via the Sync Folder

To share from your Workshare sync folder, you simply add your file to a shared folder or group.

In Finder or Windows Explorer, copy the file you want to share into a shared Workshare folder or group in the Workshare sync folder. By default, this is at C:\Users\[user name]\Workshare (and it appears in your Favorites folder or under Quick access).

Make sure sync is selected for the selected folder or group.

The members of the shared folder or group can now access your file. If email notifications are enabled, they will receive an email notification telling them you have added a file.

## Sync folder right-click options

You can also share using right-click options. When you right-click a file, folder or group in the sync folder, the following Workshare options are available:



**Note:** The **Add or remove people** option is not available when right-clicking files or folders in My Files.

## Controlling Access to your Files

You can secure and control access to your files and folders using permissions. The permissions of a group or folder apply to all the members of the group/folder. Admin users are not restricted by permissions, and admins can modify the permissions at any time.

### Setting permissions for groups

Permissions relate to an entire group so all folders and files in the group will have the same permissions applied.

Permissions in Folders are slightly different in that folders and subfolders can have different permissions and you can set expiry dates for folders. Refer to [Setting permissions for folders](#).

#### To set permissions for a group:

1. In Groups, select a group.

2. Select the **More** tab and then **Permissions**.

### Permissions

**ACCESS CONTROLS**

Yes ——— Members can add people ———  No

Yes ——— Can be shared by link ———  No

**DOCUMENT CONTROLS**

Members:

<input checked="" type="radio"/> Can add or remove files	<input type="radio"/> Cannot add or remove files Admins can always add or remove files
<input checked="" type="radio"/> Can add versions	<input type="radio"/> Cannot add versions Admins can always add new versions
<input checked="" type="radio"/> Can download files	<input type="radio"/> Cannot download files Admins can always download files

3. Adjust the permissions for your group as required.

**Members can add people**

When **Yes** is selected, members of the group can invite other users to be members of the group and share the files and folders in it.

**Can be shared by link**

When **Yes** is selected, members of the group can invite other users to the group using the **Share** option.

**Can add or remove files**

When **Yes** is selected, members of the group can add files to or remove files from the group.

**Can add versions**

When **Yes** is selected, members of the group can add versions to the files within the group.

**Can download files**

When **Yes** is selected, members of the group can download the files from the group.

4. Click **Apply**.

## Setting permissions for folders

Permissions in Folders are slightly different to permissions for groups. Folders and subfolders can have different permissions and you can set expiry dates for folders.

### To set permissions in Folders:

1. In Folders, select a folder and then click **Settings**.

### Folder Settings

Use the same settings as the parent folder

---

#### ACCESS CONTROLS

Folder members can add people - *Does not apply to admins*

Yes  No

People must sign in to Workshare to access the folder

Yes  No

GMT+0 (London)

*Members can't access this folder when the expiry date is reached. Admins will continue to have access.*

---

#### FILE CONTROLS - *Does not apply to admins*

Folder members can download files

Yes  No

Folder members can add and remove files

Yes  No

Folder members can add new versions of files

Yes  No

---

#### NOTIFICATIONS

Notify the folder owner when someone accesses the folder for the first time

Yes  No

**Note:** When sharing a subfolder, it will by default adopt the permissions of its parent folder. Leave the **Use the same settings as the parent folder** checkbox selected if you want to use the same permissions as set for the parent folder. Deselect this checkbox in order to enable the permission settings and specify individual permissions for this subfolder.

2. Adjust the following parameters to specify access and permissions to the folder and all subfolders and files within it.

<b>Folder members can add people</b>	When <b>Yes</b> is selected, members of the folder can invite other users to be members of the folder and share the files and folders in it.
<b>People must sign in to Workshare to access the folder</b>	When <b>Yes</b> is selected, members of the folder must sign into Workshare in order to access the file.  When <b>No</b> is selected, users invited to share the folder can view the file in Workshare without signing in but they will not become members of the folder until they sign in.
<b>Folder expiry date</b>	You can specify an expiry date for the folder. After this date, members of the folder will no longer be able to access the files in it.
<b>Folder members can download files</b>	When <b>Yes</b> is selected, members of the folder can download files from Workshare.
<b>Folder members can add and remove files</b>	When <b>Yes</b> is selected, members of the folder can add files to or remove files from the folder.
<b>Folder members can add new versions of files</b>	When <b>Yes</b> is selected, members of the folder can add versions to the files within the folder.
<b>Notify the folder owner...</b>	When <b>Yes</b> is selected, the owner of the folder receives an email when a member accesses the folder for the first time.

3. Click **Apply**.

## Chapter 5: Collaborating

- [Collaborating using the Desktop App](#)
- [Adding Versions](#)
- [Comparing using the Desktop App](#)

## Collaborating using the Desktop App

Once you have shared folders with other users, those users will be able to view the files in the folder and add comments in real-time. If they have permission, they can also add new versions to a file. Any comments made on files in Workshare and any new versions will be synchronized to the Workshare desktop app.

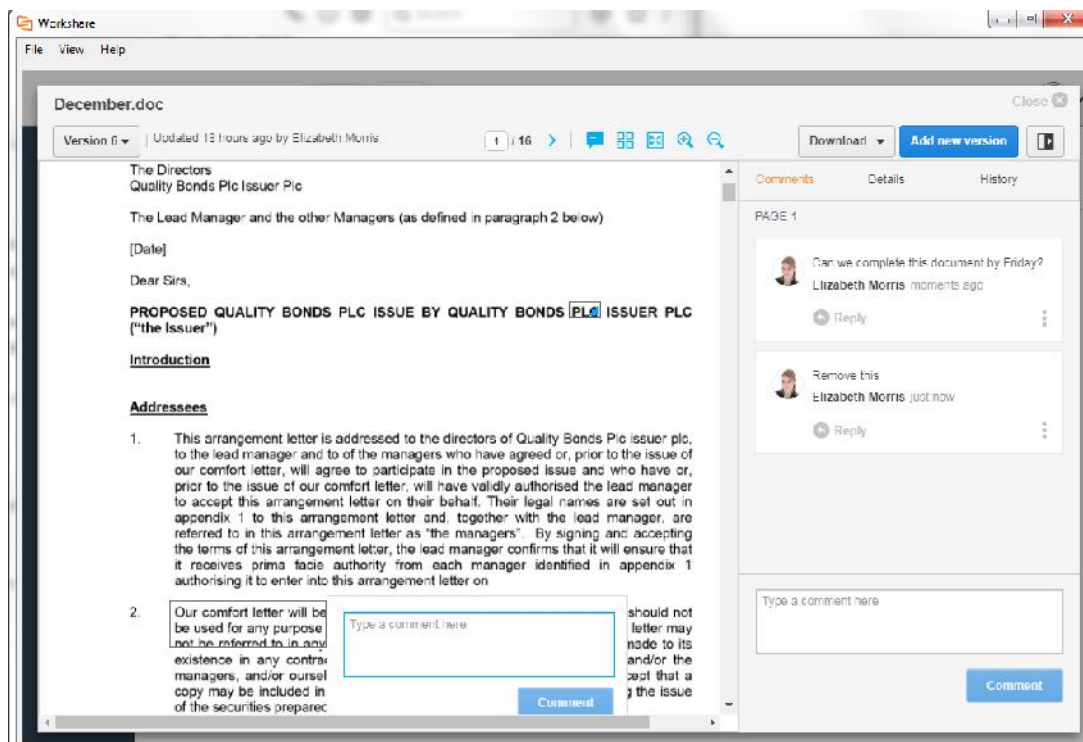
Similarly, you can add comments and upload new versions from the Workshare desktop app which will be synchronized to Workshare online.

### Adding comments

Members of a folder can access the files within the folder and add real-time comments as well as positional comments.

#### To add comments to files:

1. Click a file to open it.
2. You can add real-time comments by entering your comment in the text box on the lower right side and clicking **Comment**.
3. You can add positional comments by clicking in the file itself and dragging around the area you would like to comment upon. Then enter your comment in the text box displayed and click **Comment**. Using this method, you can tag specific items in the document and comment on them.



Your comment is displayed in the **Comments** tab. When another member of the folder views the same file in Workshare, they will also see your comment. If another member is accessing the same file simultaneously, they will see your comment in the **Comments** tab at the same time as you do.

**Note:** The **Details** tab provides information about the file type, the owner, when it was created, size, etc. It also provides information about the “members” for this file – who it has been shared with - and when they last accessed the file. The **History** tab lists all the activity around the file so you create an audit trail.

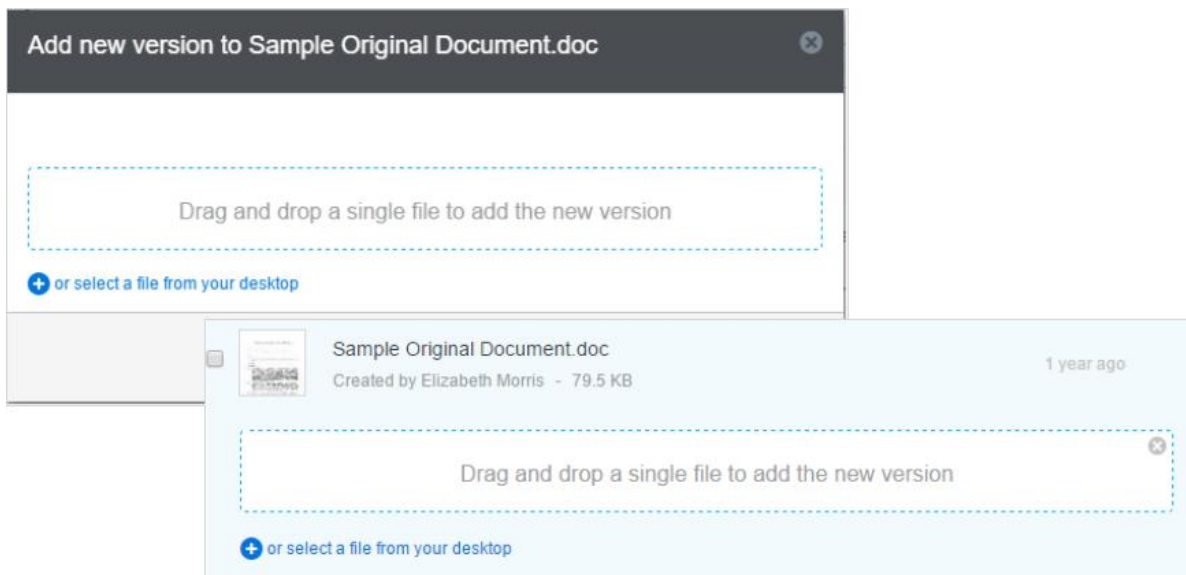
## Adding Versions

The owner of a shared folder, as well as members with permission, can add new versions to files within the shared folder.

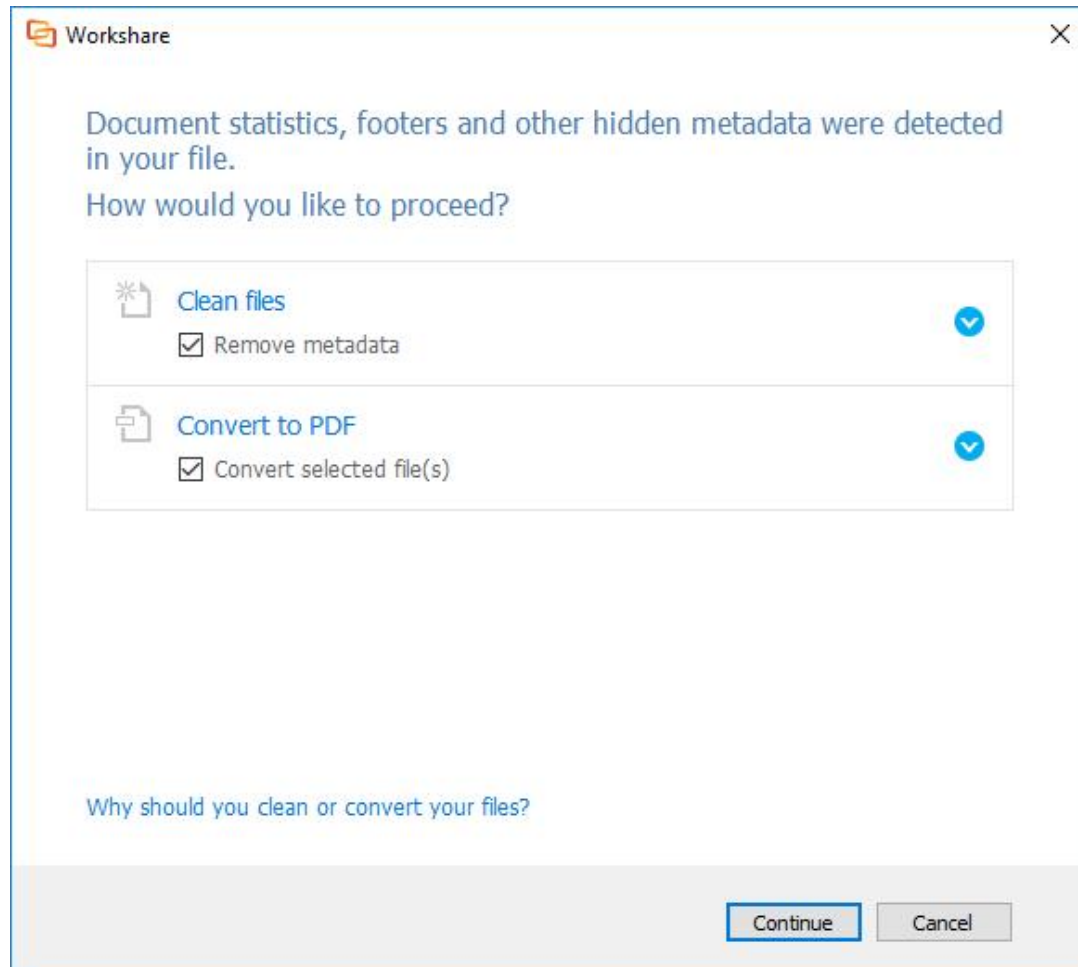
You can upload a version by selecting a file that is saved locally or on your network.

### To add a version:

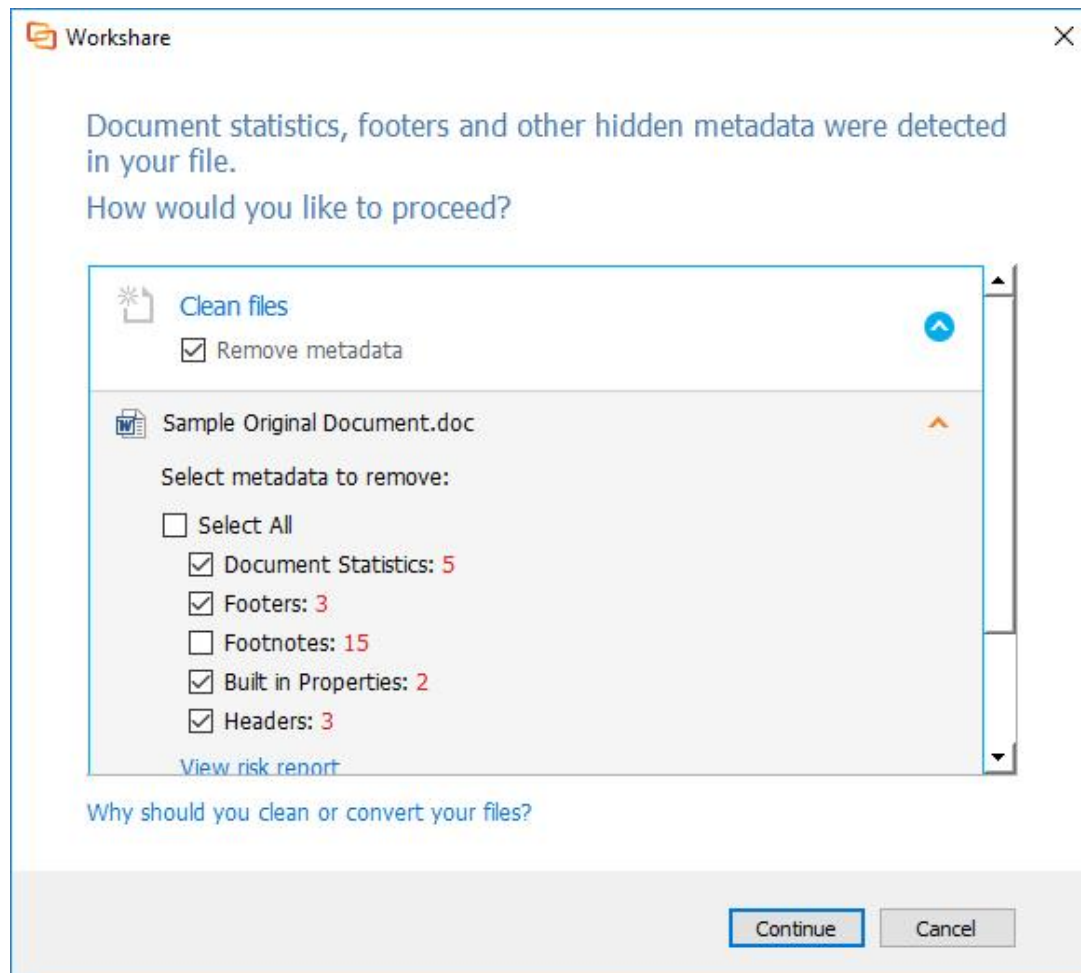
1. Click the file’s dropdown menu and select **Add new version** or open a file and click **Add new version** on the top right.



2. Drag and drop files from your desktop or Explorer/Finder or click **or select files from your desktop** and browse to the file you want to add as a version. The following page is displayed.

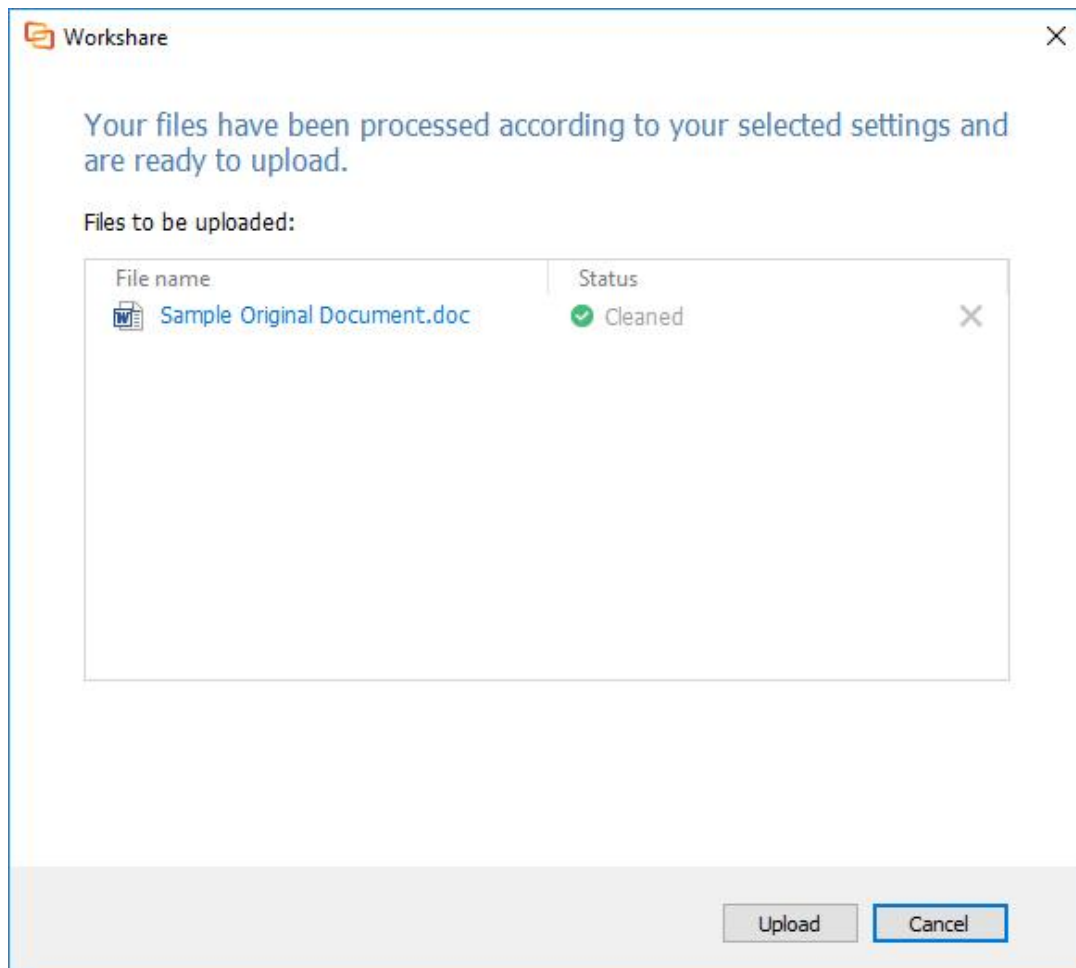


3. If you want to remove metadata from your file, leave the **Remove metadata** checkbox selected. To select specific metadata to remove, expand the **Clean files** section and then expand the file.



4. Select or deselect the specific metadata types. For example, you might want to remove all white text and document statistics but keep all fields.
5. If you want to convert your file to PDF, leave the **Convert selected file(s)** checkbox selected.
6. To specify PDF security settings, expand the **Convert to PDF** section.
7. Select whether you want to convert the file to **PDF** or **PDF/A**.
8. If you selected **PDF**, you can select one or more of the security options as required:
  - **Print:** Enables recipients to print PDF files.
  - **Edit text:** Enables recipients with Adobe Acrobat Distiller to edit PDF files.
  - **Copy text and/or graphics:** Enables recipients to copy graphics or text directly from PDF files.
  - **Add comments:** Enables recipients with Adobe Acrobat Distiller to add comments to PDF files.

- If you selected **PDF**, you can set a password to protect the PDF file by entering the password twice. When a password is specified, users can only open the PDF file after entering this password.
- Click **Continue**. The file is cleaned and converted according to your selections.



**Tip!** You can click the file name to open it and see what it looks like cleaned and/or converted.

- Click **Upload** and your file is uploaded as a new version. If the file was open, the new version is displayed.

**Note:** In order for the file to upload to Workshare online, the folder where the file is located must be set to synchronize.

## Adding versions via the sync folder

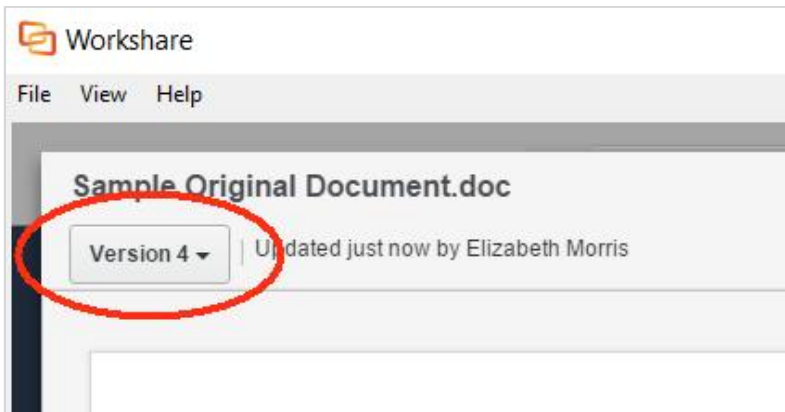
New versions can be saved to Workshare without leaving your familiar workspace. You can open documents in the Workshare sync folder, make changes as required and save them. As long as the folder the file is located in is set to synchronize, a new version is added to the file in Workshare.

**Note:** *If you want to clean metadata from your new version or convert it to PDF, you must use the Workshare desktop application to add them to Workshare.*

### To add a new version via the Workshare sync folder:

1. Open a file located in your Workshare sync folder. By default this folder is located at Users\[user name]\Workshare.
2. Make changes to the file as required.
3. Click **Save**. Your file is now saved in the Workshare sync folder and it is immediately synchronized to Workshare online and shown as a new version (if the selected folder is set to synchronize).

When opening a file in the desktop app, the version details are shown at the top left.

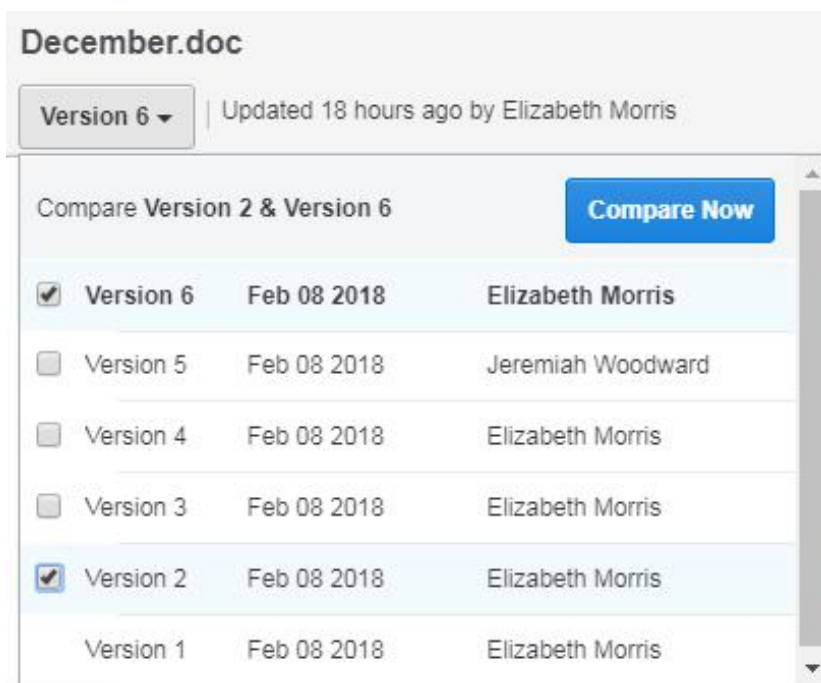


## Comparing using the Desktop App

You can compare between any two versions of a Word document or PowerPoint presentation stored in Workshare. If a comment is made on the comparison, the comment is saved and available in the version history.

### To compare versions:

1. Open a file in the desktop app.
2. Show the version history of the file by clicking **Version X** in the top left. The version history displays a list of versions of the document as well as who added each version and when.



The screenshot shows the version history for a file named "December.doc". At the top, it indicates the current version is "Version 6" and was updated 18 hours ago by Elizabeth Morris. Below this, there is a section titled "Compare Version 2 & Version 6" with a blue "Compare Now" button. A table lists the versions, with checkboxes for selecting versions to compare. Version 6 and Version 2 are selected.

Version	Date	Author
<input checked="" type="checkbox"/> Version 6	Feb 08 2018	Elizabeth Morris
<input type="checkbox"/> Version 5	Feb 08 2018	Jeremiah Woodward
<input type="checkbox"/> Version 4	Feb 08 2018	Elizabeth Morris
<input type="checkbox"/> Version 3	Feb 08 2018	Elizabeth Morris
<input checked="" type="checkbox"/> Version 2	Feb 08 2018	Elizabeth Morris
Version 1	Feb 08 2018	Elizabeth Morris

3. Select the checkboxes next to the two versions you want to compare and click **Compare Now**. A comparison document showing the differences between the selected versions is displayed.

## Chapter 6: Configuring

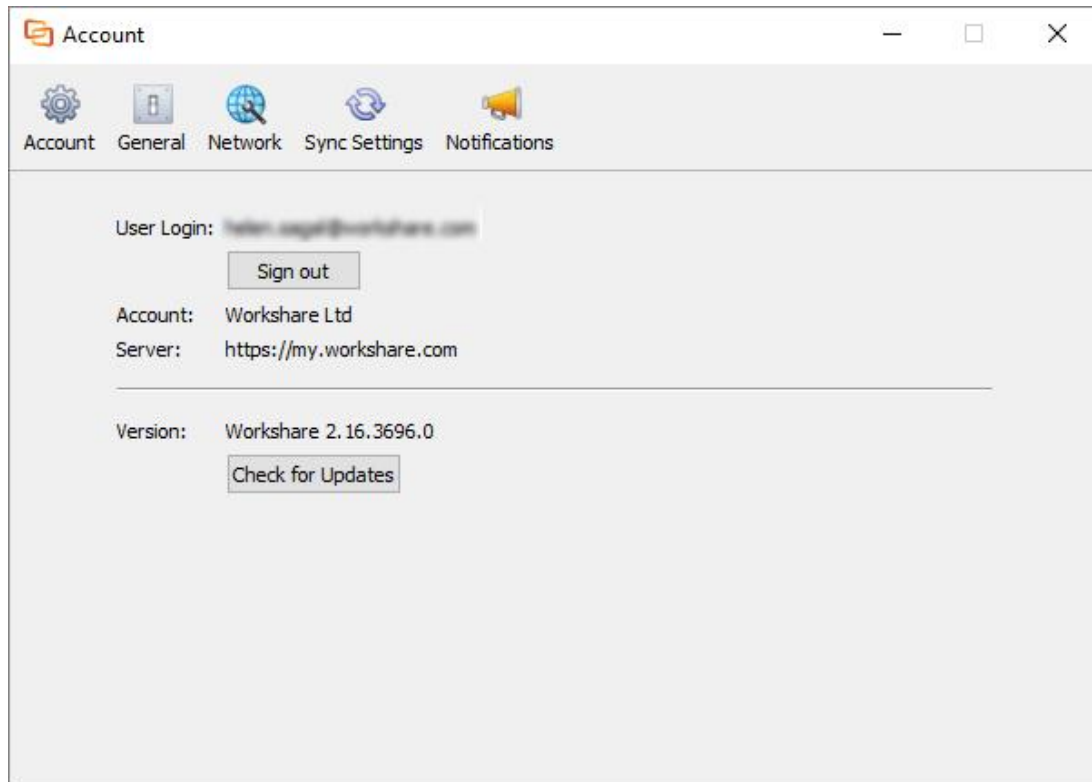
- [Configuring the Workshare Desktop App](#)

## Configuring the Workshare Desktop App

You can configure application settings for the Workshare desktop app, such as the location of the sync folder or general account settings.

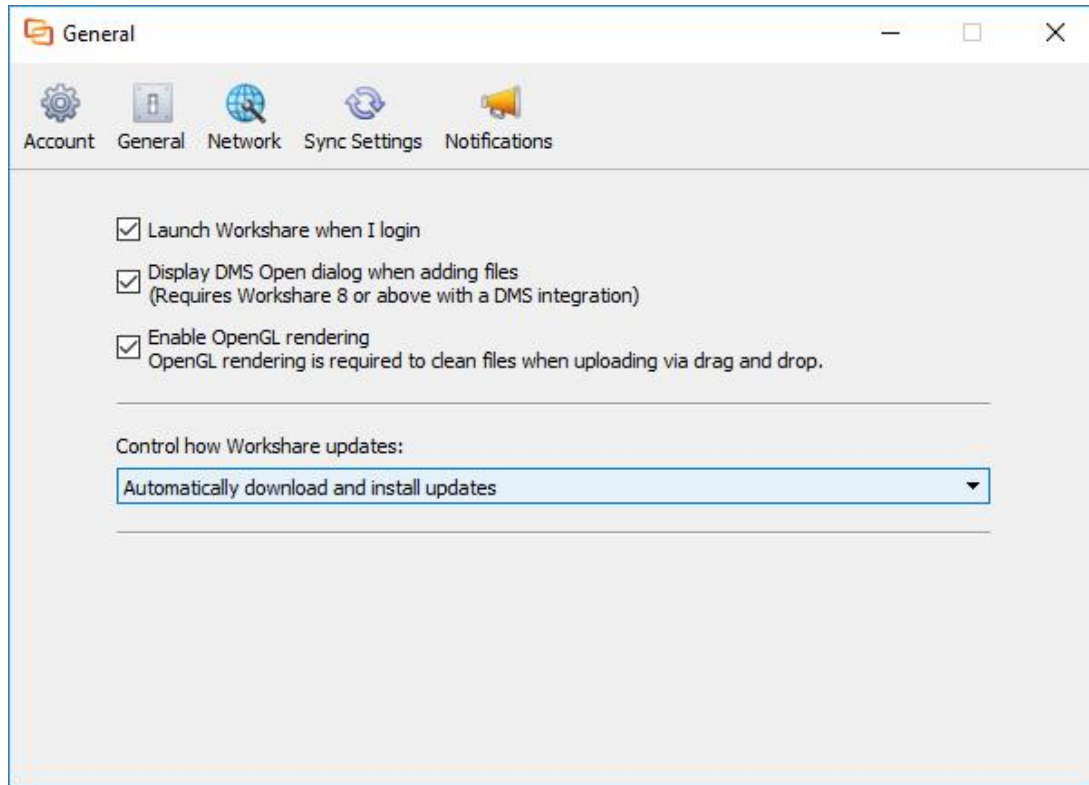
### To configure the Workshare desktop app:

1. Click the desktop app system tray icon and select **Preferences** or from the *File* menu in the desktop app main window, select **Preferences**. The following dialog is displayed.



The **Account** page provides information about your account. You can see your registered Workshare email address that you use to log in to Workshare as well as the address to the Workshare server. Additionally, you have version information about the desktop app.

## 2. Select **General**.

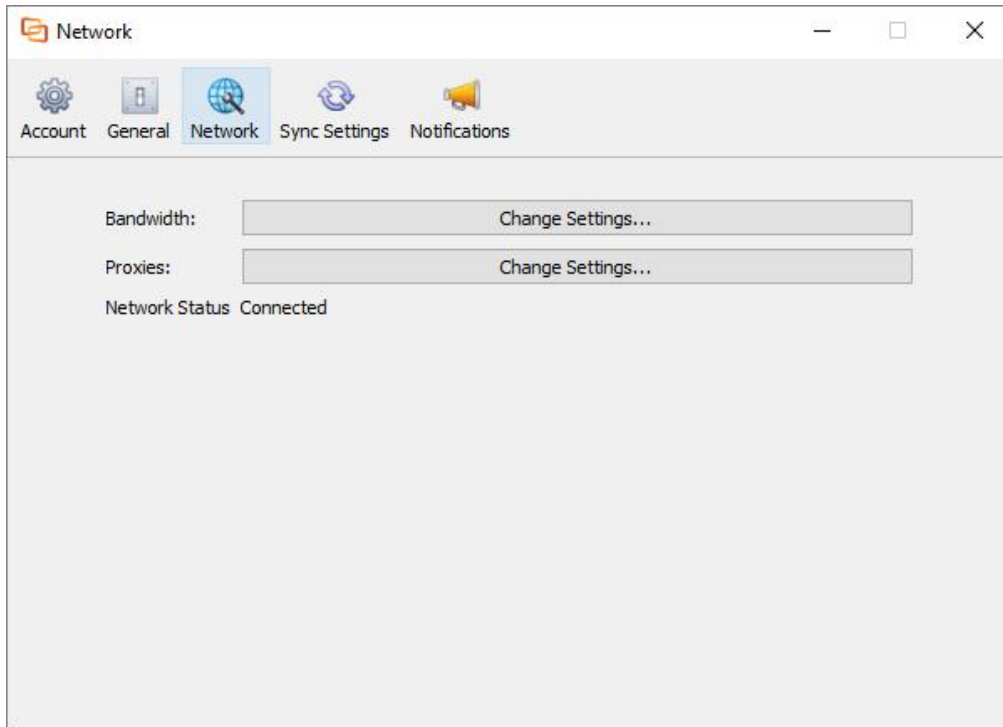


3. Select the **Launch Workshare when I login** checkbox and the desktop app will start when your computer is started.
4. When you have Workshare 9 (or above) with a DMS integration, select the **Display DMS Open dialog...** checkbox and you can select files from your DMS when uploading files to Workshare from the desktop app.
5. By default, the desktop app uses off-screen rendering (OpenGL rendering). In cases where off-screen rendering is not supported (for example, GPUs with older graphics drivers), the desktop app will automatically switch to on-screen rendering. If the desktop app cannot recognize that there is a problem with off-screen rendering, you can manually switch to on-screen rendering by deselecting the **Enable OpenGL rendering** checkbox.

**Note:** When using on-screen rendering, the clean/convert options will not be available when using drag and drop to add files. For more information about OpenGL rendering, refer to [this article](#) in the Workshare knowledge base.

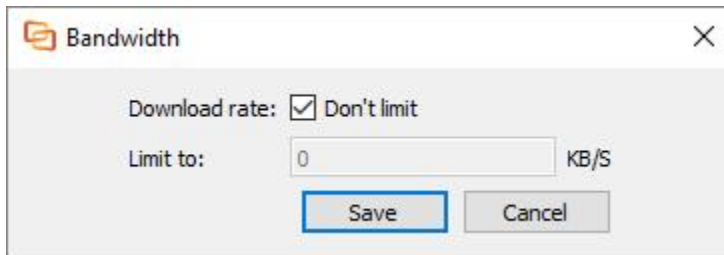
6. To control how Workshare updates, select from the dropdown:
  - **Automatically download and install updates:** Updates to the desktop app will be downloaded and installed automatically as they become available.
  - **Notify me when updates are ready to install:** You will be notified when updates to the desktop app are available.

7. Select **Network**.



The Network page enables you to limit bandwidth settings and change the settings of your proxy server.

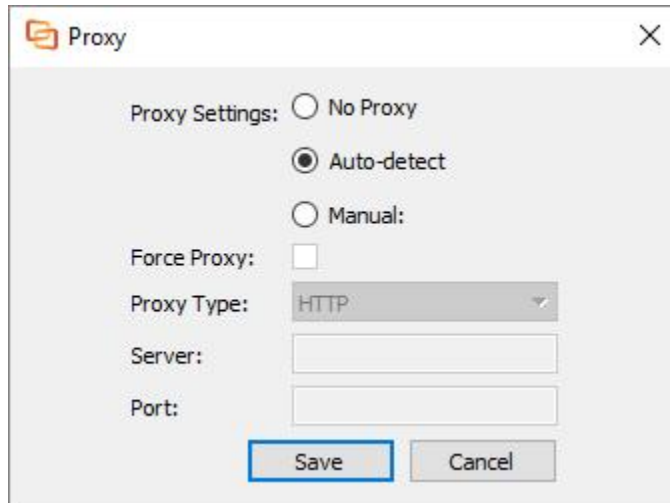
8. In the **Bandwidth** field, click **Change Settings**.



9. If you want to limit the bandwidth available to data downloaded to the desktop app, deselect the **Don't limit** checkbox and specify the limit in the **Limit to** field.

10. Click **Save**.

11. In the **Proxies** field, click **Change Settings**.

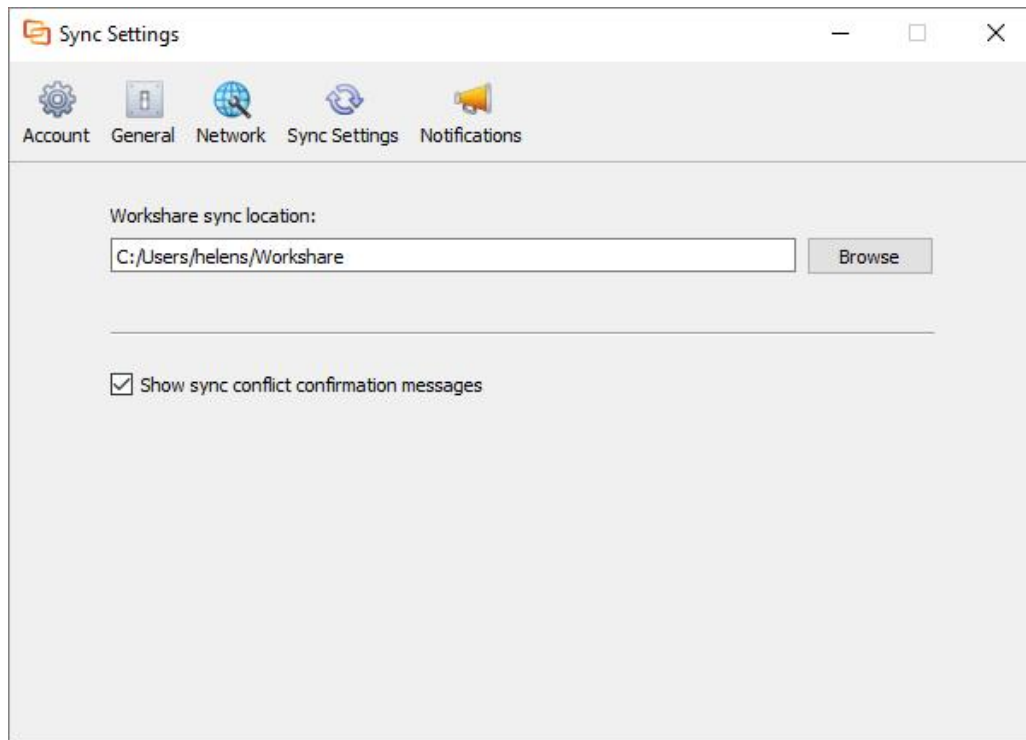


12. When working with a proxy server, select **Auto-detect** and Workshare will use your computer's system settings to connect to the network, or select **Manual** and enter your proxy server details manually.

**Note:** *There is no **Auto-detect** option available when working on a Mac.*

13. When manually specifying proxy server settings, you can select **Force Proxy** so that the desktop app traffic **MUST** go via your proxy server and if the proxy server is not available then the desktop app will be offline.
14. Select the type of your proxy server (**HTTP**, **HTTP Caching** or **Socks5**) and enter the server address and port number.
15. Click **Save**.

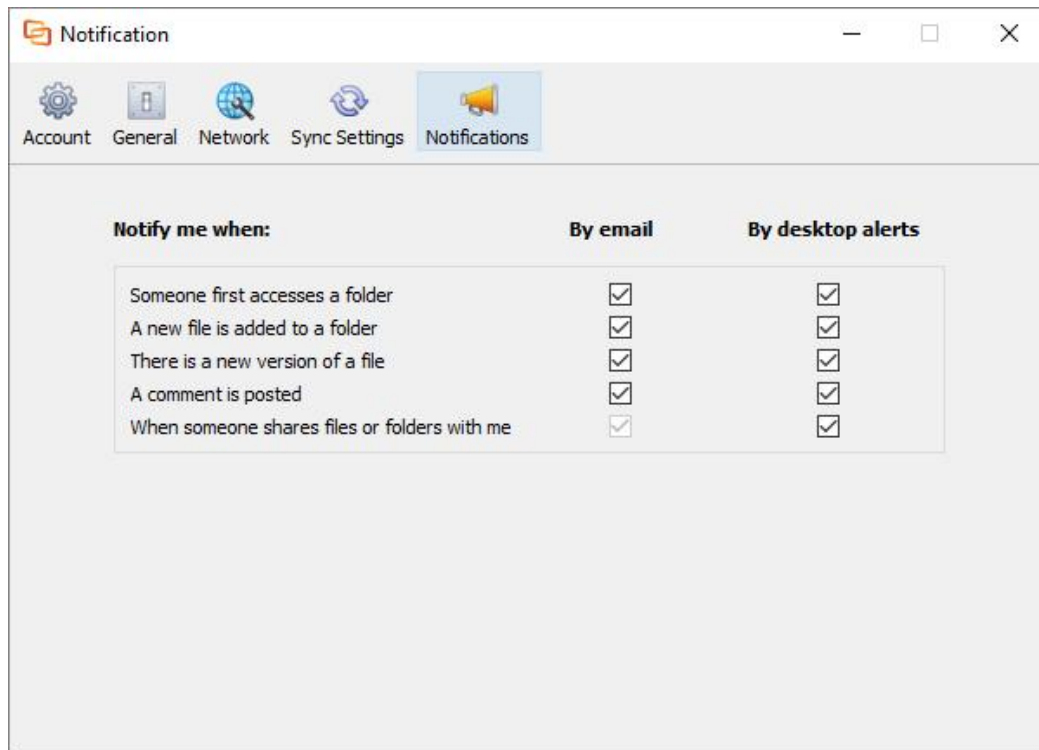
## 16. Select **Sync Settings**.



17. If required, change the location of the Workshare sync folder by clicking the browse button and selecting a different location. By default, this folder is named and located as follows:

- Windows: C:\Users\[user name]\Workshare
- Mac: /Users/[user name]/Workshare

Any files or folders put in this folder will be synced to Workshare online and will appear in the desktop app.

18. Select **Notifications**.

19. If required, change the notification settings. By default, users receive notifications by email and via desktop popup alerts in the following circumstances:
- When a user first accesses a folder you have shared with them
  - When a new file is added to a shared folder
  - When there is a new version of a file
  - When a comment is posted
  - When someone shares a file or folder with you

## Appendix A. Quick Tour of the Desktop App

- [Main Window](#)
- [Desktop App Menu Bar](#)
- [Desktop App System Tray Icon](#)

## Main Window

The desktop app provides a window into your Workshare online content. You can access all the files, folders and groups that are synchronized between your desktop and Workshare online.

Here's a summary of what each page shows:

- **Home:** Displays notification cards alerting you to recent activity in Workshare.
- **Folders:** Shows all your Workshare files and folders, including files you have uploaded, as well as files others have shared with you. There are also three default folders:
  - **My Files:** Includes personal files that you don't want to share.
  - **Received:** Includes all the files sent to you by secure file transfer from Outlook.
  - **Sent Files:** Includes all the files you sent out to others by secure file transfer from Outlook.
- **Groups:** Shows all your Workshare groups which are flexible workspaces ideal for projects that require dynamic conversations.
- **People:** Lists everyone at your company who is using Workshare.
- **Recycle Bin:** Shows all the Workshare files, folders and groups that have been deleted.

All the functionality available when accessing Workshare in your browser is available from the Workshare desktop app. In addition, you have a menu bar, a system tray menu and a few options at the top of the desktop app window.

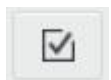
## Desktop app options



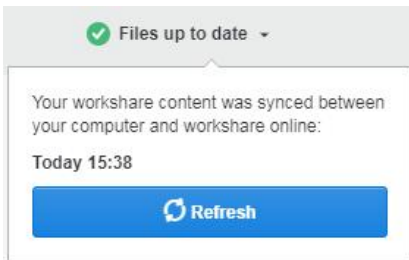
Use the search field to search for a file or folder in Workshare. Additionally, you have the following:



Opens the Workshare sync folder.



Opens the selective sync page where you can select which folders are synchronized between your desktop and Workshare online.



Provides a status on the syncing between your desktop and Workshare. Click the dropdown arrow and click **Refresh** to refresh the display and synchronize.



Indicates if there are any sync conflicts between your desktop and Workshare. Click the dropdown arrow and click **Manage conflicts** to resolve any conflicts.


## Desktop App Menu Bar

The Workshare Desktop menu bar includes the following menus and options:

Menu	Option	Description
File	Open Workshare Folder	Opens the Workshare sync folder.
	Preferences	Enables you to change application settings for the desktop app, such as the location of the sync folder or general account settings.
	Selective Sync	Enables you to select which folders are synchronized between your desktop and Workshare online.
	Close Workshare App	Closes the desktop app window although synchronization between your desktop and Workshare online continues in the background.
View	Reload	Refreshes the display.
	Sync Progress	Displays the sync progress page where you can see the synchronization status of files and folders. This option is only enabled when synchronization is in progress.
	Check for Updates	Checks to see if any updates are available for the Workshare desktop app.
Help	Search Knowledge Base	Provides access to the Workshare knowledge base.
	How To Videos	Provides access to Workshare videos on YouTube.
	Ask us a question	Enables you to contact Workshare Support.

Menu	Option	Description
	<b>About Workshare</b>	Provides version information about the Workshare desktop app.

## Desktop App System Tray Icon

A green tick on the desktop app system tray icon  shows that the desktop app is fully synchronized with Workshare online. A warning sign shows that it is not and a blue arrow shows that it is in the process of synchronizing. Clicking the icon displays the following options:

Option	Description
<b>Open Workshare App</b>	Opens the Workshare desktop app window.
<b>Open Workshare folder</b>	Opens the Workshare sync folder.
<b>Files up to date/conflicts</b>	Indicates that all files are synchronized successfully or if there are sync conflicts between the desktop app and Workshare.
<b>Pause</b>	Pauses the current synchronization. The option becomes <b>Resume Syncing</b> when synchronization is paused.
<b>Refresh</b>	Refreshes the display and synchronize with Workshare online.
<b>Recycle Bin</b>	Displays the Workshare recycle bin which includes all the Workshare files, folders and groups that have been deleted.
<b>Selective Sync</b>	Enables you to select which folders are synchronized between your desktop and Workshare online.
<b>Preferences</b>	Enables you to change application settings for the desktop app, such as the location of the sync folder or general account settings.
<b>Help and support</b>	Provides access to the Workshare knowledge base.
<b>Quit Workshare</b>	Stops the synchronization between your desktop and Workshare online.

 Workshare Ltd.

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**Revisions**

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