

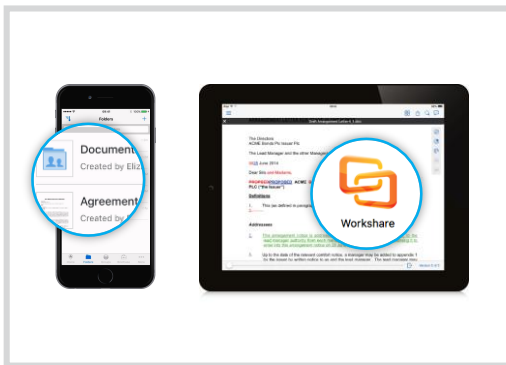


# Workshare iPhone/iPad App Getting Started Guide

# Love your job, not the office

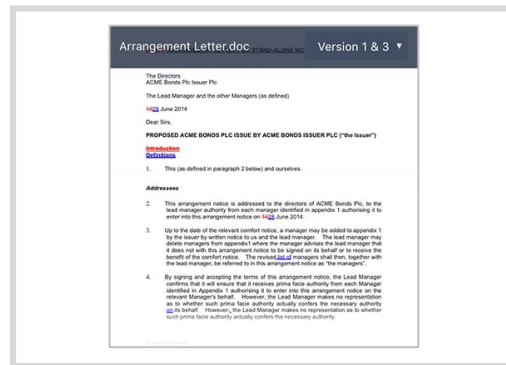
Stay productive on the move by taking your files with you on your iPhone or iPad.

## Access files anywhere



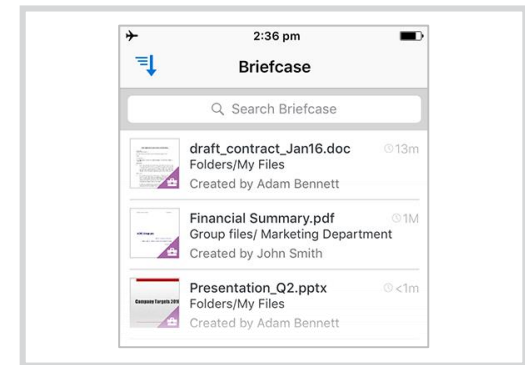
When your files are on Workshare, you can access them from your iPhone or iPad and copy them to your other mobile apps.

## Review on the go



Share your files in folders or groups. Compare files and add comments so you and your team can work more efficiently.

## Work offline



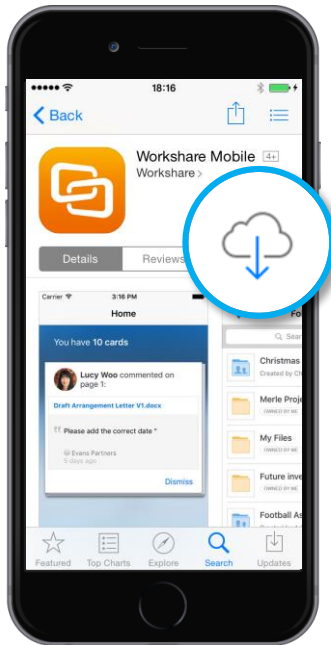
When you need documents offline, store them in your mobile Briefcase. You can keep working directly on your iPhone or iPad.

Get started...

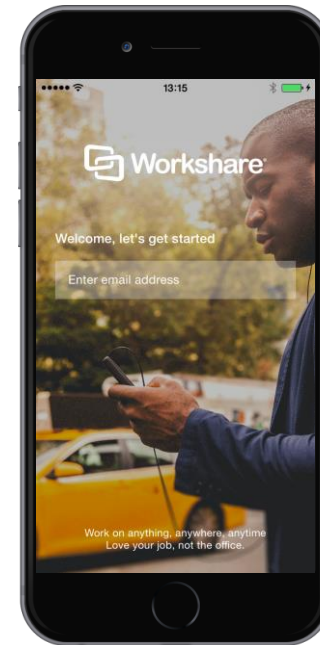
## Get started

# Download the app and log in

You can get the iPhone app and iPad app for free.



Download the Workshare app from the App Store. Once it's installed, Workshare will be added to your apps. Tap it to open it.



Sign in with the email address and password for your Workshare online account.

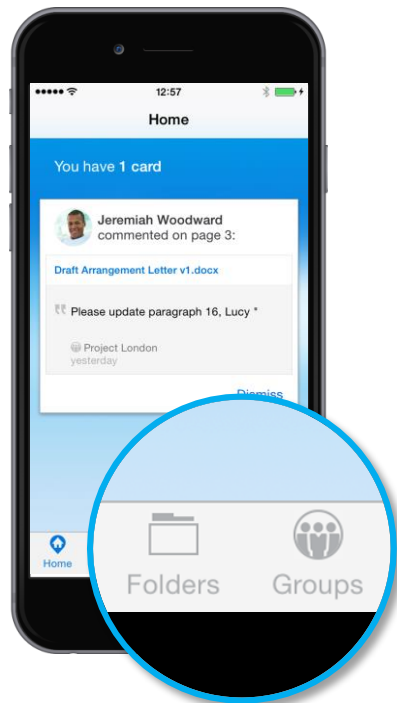


If you don't already have a Workshare online account, you can create one by entering your email address on the login screen.

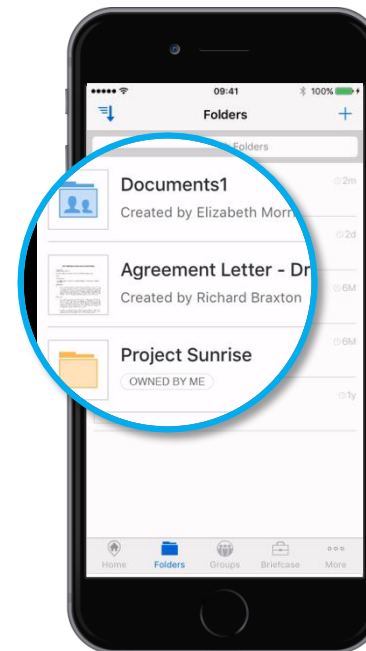
## Access files anywhere

# Go to your files, folders and groups

You can access all your files, folders and groups in Workshare.



Use the navigation at the bottom to go to the **Folders** or **Groups** areas.



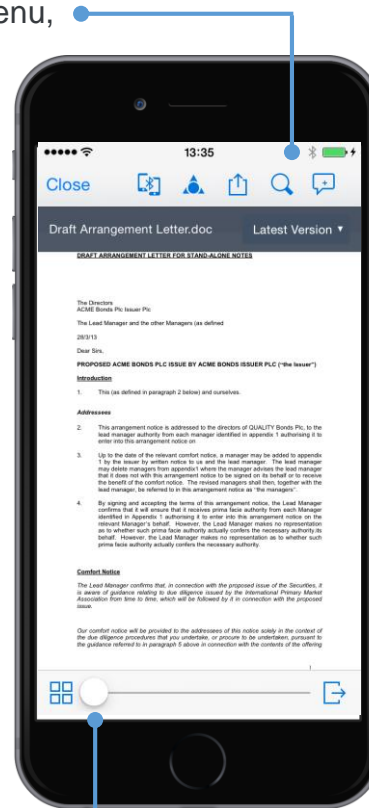
If you've navigated to **Folders** or **Groups**, tap a folder or group to open it. Tap a file to view it.

# Access files anywhere

## View files

Tap a file to view it.

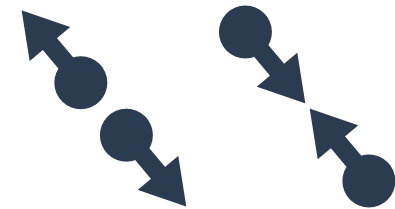
To open the file actions menu, tap the top of the file.



Swipe left to go to the **next page**.  
Swipe right to go to **previous page**.



Pinch to **Zoom in** and **zoom out**.



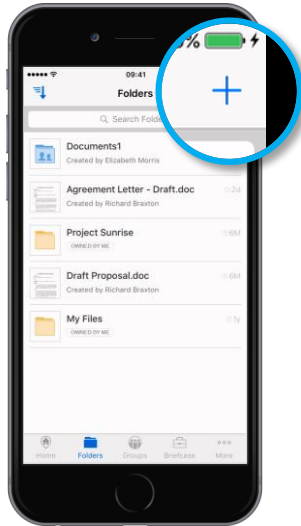
Navigate through **large documents** quickly using the slider at the bottom.

# Access files anywhere



## Copy files between apps

You can copy files from your other apps to Workshare so you can compare them, share them and sync them across all your devices. Likewise, you can copy files from Workshare to other apps on your device.

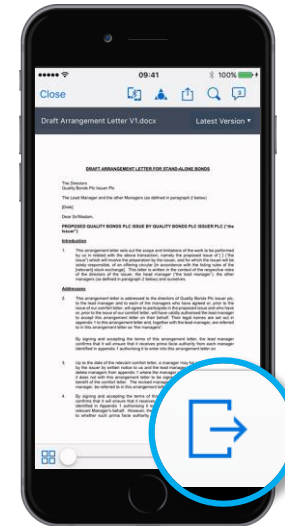
### Add a file to Workshare




To add a copy of a file from another app on your device, go to **Folders** or **Groups** and tap **+**.

You can also copy the file to a specific folder or group. In a folder, tap  then . In a group, tap **Add file**.

### Export a file to another app

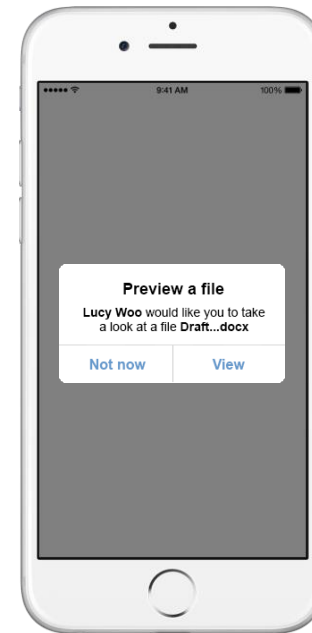
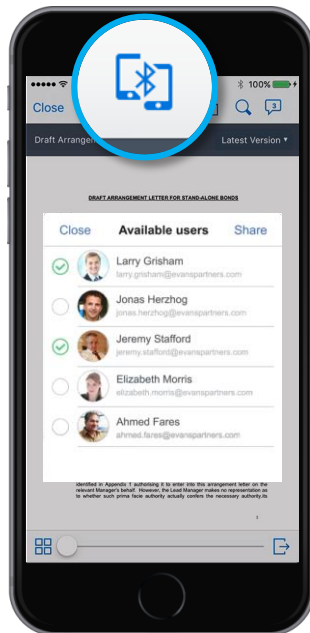


To save a copy of a file from Workshare to your mobile device, open the file and tap .

## Access files anywhere

# Share files with people nearby

Proximity sharing is a way to send files to someone else who's close to you. To receive files, the other person must have Bluetooth enabled and have the Workshare iPhone/iPad app installed.



Go to a file and tap the proximity share button.

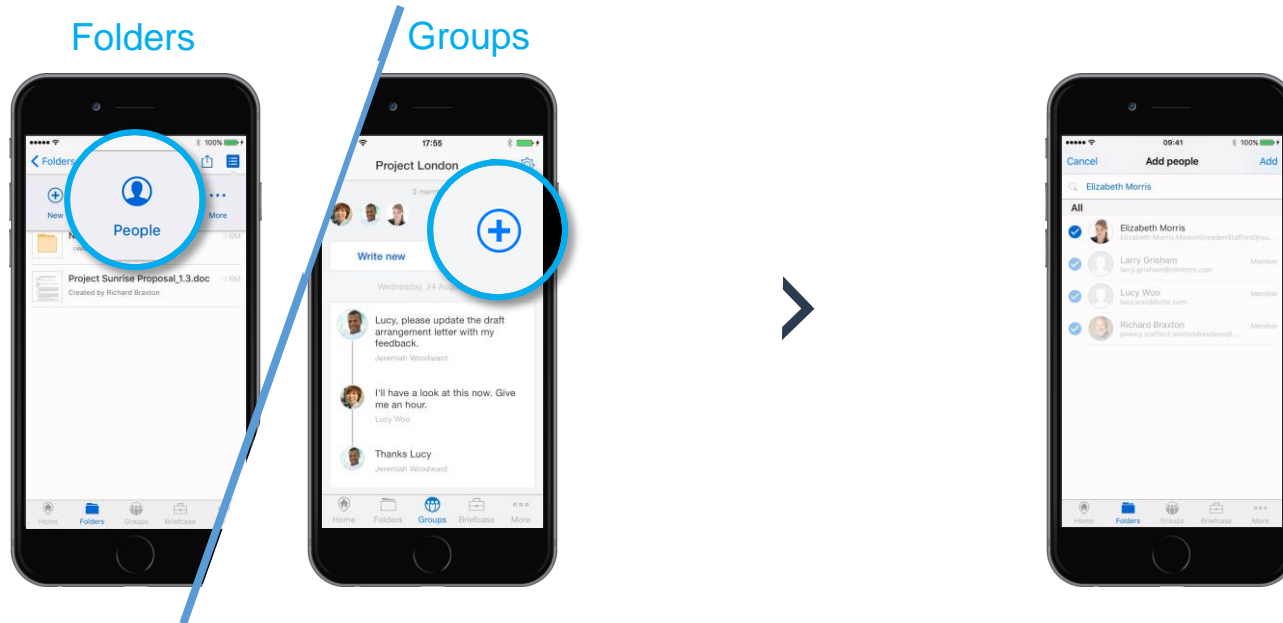
Workshare recognizes other users with Proximity Share around you. Select who you'd like to share the file with and tap **Share**.



The recipient receives a notification that a file's been shared with them. They can see the file by tapping **View**.


## Review on the go

# Invite people to share your folder or group

If you want to work with others, share your Workshare folder or group.



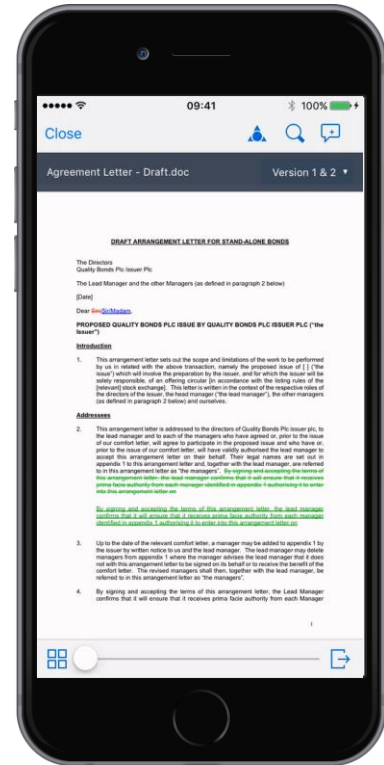
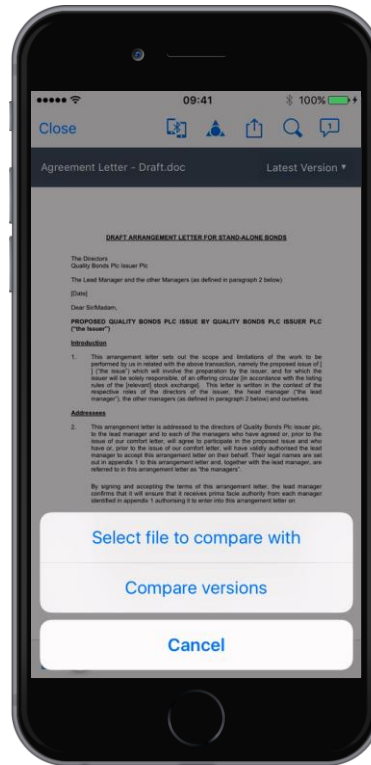
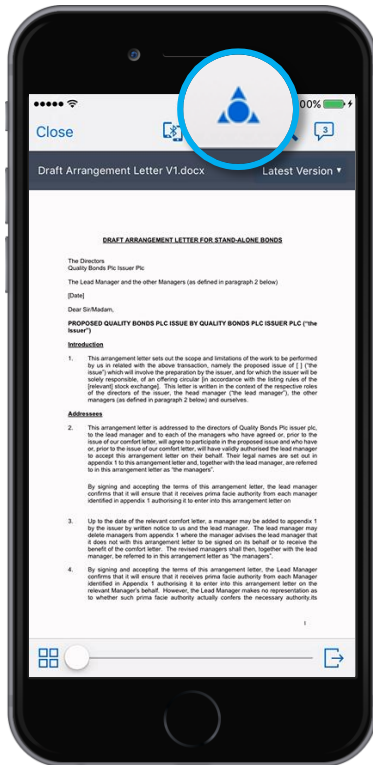
In a folder, tap  at the top right, then tap **People**. Next, tap .

In a group, tap .

You'll see a list of your contacts and people at your company who are using Workshare. Select who you'd like to invite and tap **Add**. They'll receive an email invitation to the folder.

# Review on the go Compare files

You can compare two different files in Workshare or two versions of the same file.



Open a file in **Folders** or **Groups** and select the Compare icon.

To compare this file with a different file, choose **Select file to compare with**. To compare the latest version with a previous version, select **Compare versions**.

Choose the second file or version.

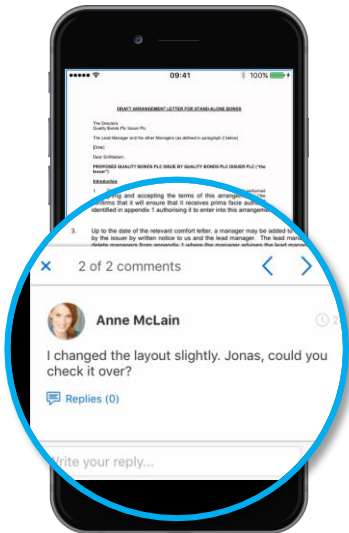
The redline will be generated.


# Review on the go

## Exchange comments

Anyone sharing your folder or group will be able to see and make comments on files.

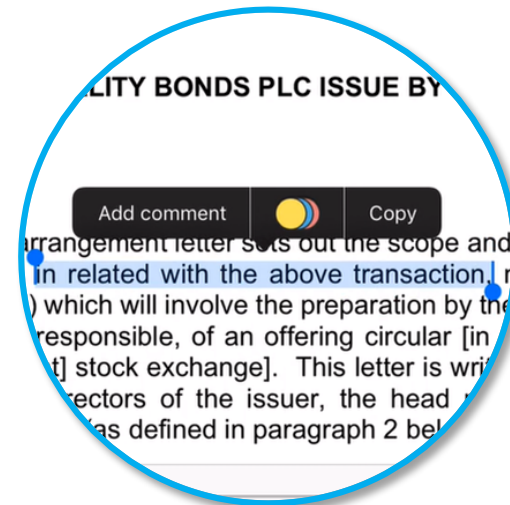
### See comments



To see the comments on a file, tap the  icon at the top of the file. The number in the icon indicates the number of comments on the page.



If there's more than one comment, use the arrows at the top of the comment to navigate between them.

### Make comments



To comment on text, first press on the text to select the area to highlight. Drag the circles on either side to adjust the highlighted area. Next, tap **Add comment**.

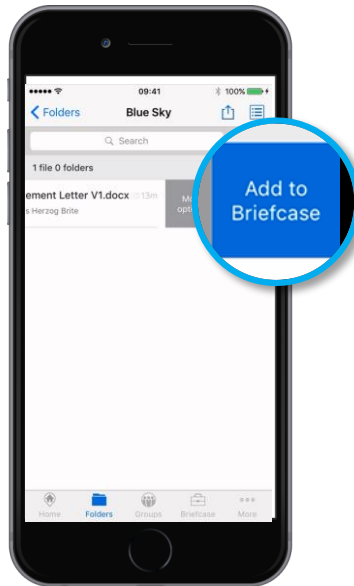
To add a positional comment on any area of the page – even if it doesn't contain text – press, hold and release.

To add a comment that isn't tagged to any text, click the  icon at the top. If there are comments already on the file, next tap .

## Work offline

# Add files to your briefcase so you can work offline

To access the **Folders** and **Groups** areas, you need an internet connection. If you want to work on files while you're offline, add them to your **Briefcase**. To add a file or folder to your briefcase, swipe left on the file or folder and tap **Add to Briefcase**. New versions of files are automatically synced to your **Briefcase**.



Files added to your **Briefcase** have an icon in the bottom left corner of the thumbnail:



To access your briefcase, select **Briefcase** from the navigation at the bottom:



## Knowledge base

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

[workshare.force.com/knowledgebase](https://workshare.force.com/knowledgebase)

## Technical support

If you have any questions, email us at

[support@workshare.com](mailto:support@workshare.com)