

Contentworker.

Documents Collaboration and Sharing

Mykhailo Pysarskyi Revision 3 2021-09-16



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1 About this guide.

This user guide contains step-by-step instructions on how to use Contentworker Documents Collaboration and Sharing features.



2 Before you start.

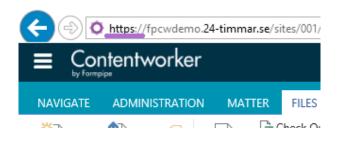
2.1 Configure Trusted sites Zone in Internet Explorer

Add <u>https://login.microsoftonline.com</u> to Trusted Sites Zone in the Internet Explorer browser. Close and reopen the browser.

Internet (Options					?	\times					
General	Security	Privacy	Content	Connections	Programs	Advan	ced					
Select a	Select a zone to view or change security settings.											
		S		/ (\mathbf{S}							
Inte	ernet L	ocal intrar	net Trust		stricted sites							
Trusted s	sites					×						
Add this	website to			curity settings.	Ac	ld						
https:/	//login.micr	osoftonlin	e.com		Rem	ove						
<				>								
Requ	Require server verification (https:) for all sites in this zone											
					Clo	se						
			UN	. Ca	incer	Appr	У					

2.2 Use HTTPS connection

Be sure Contentworker site connection is secure – Contentworker site is opened under HTTPS protocol in a web browser.





3 Document sharing with an external party.

3.1 Share to Office 365

1. Navigate to a document type folder, select document(s) that you want to share with an external party and click the "Share to Office 365" ribbon button.

E Contentw	vorker															٨	lewsfeed
NAVIGATE ADMIN	IISTRATION MAT	ITER FIL	ES LIE	RARY													
 New Document - Upload Document New Folder New 	Edit Document 😤 Open & Check Out	View Properties	Edit Propert Manage		E-mail Attachment		365	Check Out to C 365 re & Track	Office Check	In from 365	m Office	Move Duplicat to Docume			Select Document Copies	Copy as a link	Send To A KHR
ACTIT AB EF Test	AJAX NV General ac	dvice		AS C a ent Ov	ARS erview Matt	BARLEY Aquire H	ΑΡΡΥ ΗΟΓ		ANCE CO with Profe			LE E. COYOT e E Coyote vs		ZOOBRA Insolvency			
Go to matter Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002) Correspondence																	
Saved Searches		~	Sta	rt	Documents	Details	Calend	ar Tasks	Corres	ponc	lence	Notes Di	scussion	s Finano	ce		
My Recent Matters			All Do	cumer	ts Hide Folder	s •••	Fin	d a file		\$	D I	Labels filter:				6	2
Ajax NV (1025)			~	Q	Name						Document	ID Version	Modified	d Mod	ified By	De	ocument D
BAAS Cars (100				Q	Letter to f	Ars B					688	0.6	March 2	23 🗆 C	WAdmin	Ju	ne 13, 20'
Insurance Corp			× -	Q	Letter to I	Лr X					833	0.24	March 1	12 C	WAdmin	Μ	arch 12
Merger wit	h Professional Insura	ance		Q	Letter to J	ohn Doe					858	1.2	March 1	12 0	WAdmin	M	arch 12
			~	Q	Loan_Agn	eementA	ug_8				3321	0.2	March 1	10 C	WAdmin	М	arch 10
DD I51	oondence [12]			Q	Arrangem	ent Letter D	ocsCorp w	ith references (a	2)		1813	1.0	March 1	10 🗆 C	WAdmin	М	arch 10

Or use document properties popup Extra ribbon tab.

VIEW	EXTRA				
Duplicate Document	Gopy as a link 🖶 Print Copy as a link 🖶 Print Activity History Send To KHR	E-mail Attachments	E-mail Links	Check Out to Office 365	
	Actions		Sh	are & Track	,
Name Title	Loan_Agreement	Aug_8.DOC	X		

performed on this matter workspace before. Click "Connect now"



to continue the check-out process. This will create the Office 365 team site automatically on the fly and associate it with the matter.

Share to Office 365			×
To proceed with Share please connect mat take a moment.	ter to Office 36	5. It will	
	Connect now	Cancel	

3. Enter external party emails, you want to share a document with, to the "People to share with" field and click the Share button.

Share to Office 365		×
People to share with		
customer_1@outlook.com × customer_2@company	/.com ×	
	Share	Cancel

4. Internet Explorer browser might be configured to block pop-ups. If so, please click "Always allow".

			Always allow
Internet Explorer blocked a pop-up from fpcwdemo.24-timmar.se.	Allow once	Options for this site 🔻	More settings

 You might be asked to enter your corporate Office 365 account credentials when you Share to Office 365 for the first time. If you don't know what account to use or don't have one, please contact your IT department.



	urance rrespor			/ Merger with Professional Insurance Ltd (0002)		
	Start		cuments	D _c Share to Office 365	×	Finance
All	Docum	ents	Hide Folder	https://login.microsoftonline.com/?response_type=id_toke	×	
~	Q	D	Name	Microsoft		Modified By
	Q		Letter to M			CWAdmin
~	Q		Letter to I	· · · ·		CWAdmin
	Q		Letter to J	Enter password		CWAdmin
~	Q		Loan_Agre	Because you're accessing sensitive info, you need to verify		CWAdmin
	Q		Arrangem	your password.		CWAdmin
	Q		Demo for	Password		CWAdmin
	Q	pdf	Contentw		arch 10	CWAdmin
			Screenshc	Forgot my password	arch 10	CWAdmin
	Q		Letter to (Sign in with another account	ne 13, 201	7 🗌 David Little
	Q		Letter to E	Sign in	ne 13, 201	7 🔲 Staffan Hug
	Q		Letter to M		ay 23, 2017	/ 🗌 David Little
	Q		Letter to A		oril 20, 201	7 🔲 Staffan Hug

6. Wait until document(s) are processed.

Share to Office 365		×
¢	Processing file 1 of 2	

7. Documents will be copied to the Office 365 team site folder and shared with the external party. Click the "Send link" button to send the secure link via email or copy the link via clicking "Copy link" and share it with the external party in any other way.



Share to Office 365		×					
You're done!							
https://traenab.sharepoint.com/:f:/s/100016-0002/EnujM04wMatCqu							
Se	end link Copy Link						

Clicking on the "Send link" button will open a new email window, prefill To field with entered emails, prefill Subject field and email body. Of course, you can change email fields to other values.

8 93			CWAdmin	shared docum	ents with yo	u - Message	(HTML)		F	- 0	×
File Me	e ssage Ins	ert Options	Format Text	Review I	Help (🔉 Tell me	what you w	ant to do			
Paste Clipboard S	Basic Na	R D mes Include	 Attach Docume Send and Save Tag for Filing ~ Contentworker 	Tags	Dictate Voice	Sensitivity Sensitivity	Dynamics 365	New Meeting Poll FindTime	Insights	View Templates My Templates	~
Send	То	customer 1	@outlook.com; custo	mer 2@comp		Scholandy	•	- manne			
	Bcc Subject	CWAdmins	hared documents wi	th you							
Documents	link <u>https:/</u>	/traenab.sha	repoint.com/:f:/s	<u>/100016-00</u>	<u>02/EnujM</u>	04wMatCq	uumblkHB	<u>DcBdewQow</u> v	vqPkamH	<u>lkH96Lc7zA</u> .	
4											

Only you (using your corporate Office 365 account) and an external party will be allowed to access documents by secure link. A secure link allows you to view or download shared documents.



4 Document collaboration with an external party.

4.1 Check Out to Office 365

1. Navigate to a document type folder, select document(s) that you want to share with an external party and click "Check Out to Office 365" ribbon button.

≡ Content	worker											Newsfeed
NAVIGATE ADMI	NISTRATION MAT	TER FILE	ES LI	IRARY								
 New Document . Upload Document New Folder New 	Edit Document 🔞 Open & Check Out	View Properties	Edit Propert Manage	es 🗙	E-mail Attachments	Links 3	-N ut to Office	Check In from Offi 365	ce Move to		vnload a Copy Copies	Copy as a Send To Link KHR
ACTIT AB EF Test	AJAX NV General ad	lvice		AS CA	RS rview Matt	BARLEY Aquire HAPPY	HOPS	INSURANCE Merger with Pr		WILE E. COYO Wile E Coyote v		BRACKET vency
Go to matter				ance Co esponde		/ Merger with I	Professiona	I Insurance Ltd	(0002)			
Saved Searches	_	^	Sta	rt D	ocuments	Details Ca	lendar	Tasks Cor	responde	nce Notes E)iscussions F	inance
My Favourite Mat			All Do	cument	Hide Folder	5 •••	Find a fil	e	Q	Labels filter:		
			~) Name			Document ID	Version	Modified	Modified By	Document Dat
3 Ajax NV (1025			× 1	Q 0	Letter to J	ohn Doe		858	1.1	Yesterday at 3:48 PM	CWAdmin	Yesterday
BARLEY (1000				9	Loan_Agre	ementAug_8		3321	0.2	Yesterday at 3:47 PM	CWAdmin	Yesterday
G Insurance Cor	rp Inc (100016)		~	Q 0	Letter to M	Ar X		833	0.23	Yesterday at 3:47 PM	CWAdmin	Yesterday
🔄 🔄 Merger w	ith Professional Insura ment [27]	ance		۹ ۵	Arrangem with refere	ent Letter DocsCo nces (2)	orp	1813	1.0	Yesterday at 3:45 PM	🗆 CWAdmin	Yesterday

Or use document properties popup Extra ribbon tab.

VIEW EXT	dence - Loan_Agr _{RA}		_~uy_	<u>0.0000</u>	
	Copy as a link 🖶 Print Activity History Send To KHR Actions	E-mail Attachments	E-mail Links Sha	Share to Office 365	
Name Title	Loan_Agreement_	Aug_8.DOC	х		^



2. You might be asked to connect the matter to Office 365 in case Share to Office 365 or Check Out to Office 365 has not been performed on this matter workspace before. Click "Connect now" to continue the check-out process. This will create the Office 365 team site automatically on the fly and associate it with the matter.

Check Out to Office 365	×
To proceed with Check Out please connect matter to Office 365. It will take a moment.	
Connect now Cancel	

3. Enter external party emails, you want to share a document with, to the "People to share with" field and click the "Check Out" button.

Check Out to Office 365		>
People to share with		
customer_1@outlook.com × customer_2@com	pany.com ×	
	Check Out	Cancel
	check but	see rolel

4. Internet Explorer browser might be configured to block pop-ups. If so, please click "Always allow".

			Always allow
Internet Explorer blocked a pop-up from fpcwdemo.24-timmar.se.	Allow once	Options for this site 🔻	More settings

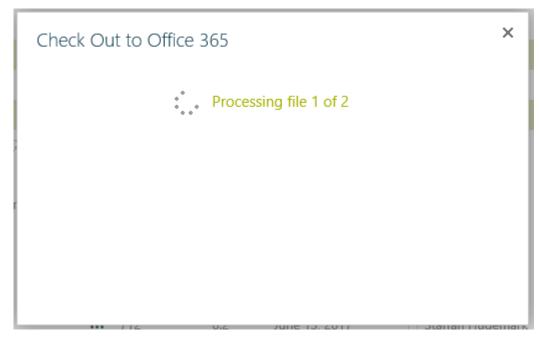
5. You might be asked to enter your corporate Office 365 account credentials when you Check out to Office 365 for the first time. If



you don't know what account to use or don't have one, please contact your IT department.

S	tart	Doc	uments	Details	Calendar	Tasks	Correspondence	Notes	Discussions	Finance			
All C	ocum	ents	Hide Folders	5 •••	Find a f	īle	Q	Labels filte	21:		6	2	
~	Q	D	Name				Check Out to	Office 365			;	×	Document Date
~	Q		Letter to Jo	ohn Doe			🛿 🧉 Sign in to your accour	at - Internet Fxnl	orer		×		Yesterday
	Q		Loan_Agre	ementAu	ıg_8		https://login.microsof			068-82632dea6940/or			Yesterday
~	Q		Letter to N	4r X			_, ,,						Yesterday
	Q		Arrangeme	ent Letter D	ocsCorp with re	ference	Microso	ft					Yesterday
	Q		Demo for J	JT			L						Yesterday
	Q		Contentwo	orker White	Paper - Security	/ and Pe							January 3, 2018
			Screensho	ts of slides f	irom Kim 🗱		Enter pas	sword					Yesterday
	Q		Letter to C				Password						June 13, 2017
	Q		Letter to N	Irs B			·						June 13, 2017
	Q		Letter to E				Forgot my passw	rord			en	nark	June 13, 2017
	Q		Letter to N	lr D						Sign in			May 23, 2017
	Q		Letter to A							sign in	en	nark	January 31, 201

6. Wait until document(s) are processed.



7. Document(s) will be copied to the Office 365 team site folder and shared with the external party. Click the "Send link" button to send the secure link via email or copy the link via clicking "Copy link" and share it with the external party in any other way.



Check Out to Office 365			×
You're done!			
https://traenab.sharepoint.com/:f:/s/100016-00	002/EtY7miF	5nwBKpCE	
	Send link	Copy Link	
		- Nalian Hun	emark

Clicking on the "Send link" button will open a new email window, prefill To field with entered emails, prefill Subject field and email body. Of course, you can change email fields to any other values.

B 9 0			CWA	dmin shared	d documen	ts with you -	Message (HTM	VIL)		Ŧ			×
File Me	essage Insert	t Optic	ons Format Text	Review	Help	Q Tel	ll me what yo	ou want to do					
Paste 🗳	A Basic Text ~ ~	0 Include	 Attach Document Send and Save Tag for Filing ~ Contentworker 	Tags ~	Dictate Voice	Sensitivity Sensitivity	Dynamics 365	New Meeting Poll FindTime) Insights	View Templates My Templates			^
) Send	To Cc Bcc	customer_1	l@outlook.com; custom	er_2@comp	any.com								
	Subject	CWAdmin	shared documents with y	/ou									
			repoint.com/:f:/s/10		02/EtY7m	ıiF5nwBКрС	<u>BATQnnXB</u>	wB RwMzGv	tvCXoca8i	<u>m0c_C0g</u> , In	case yo	ou need	I

Only you (using your corporate Office 365 account) and an external party will be allowed to make changes to documents by secure link. Please ask the external party to make edits into documents in Office 365 team site folder but not download them. It is an important part of a collaboration that allows you to "check-in" changes from Office 365 back to Contentworker.



 Checked out to Office 365 document becomes "locked" in Contentworker and cannot be edited by anyone while it remains "checked-out". Checked Out to Office 365 documents are marked with a blue "check-out" icon, so it's easy to recognize them.

Start	Doc	uments D	Details	Cale	endar	Tasks	Corres	pon	dence	Not	es [Discussions	Financ
All Docume	ents	Hide Folders			Find a f	ïle			Q	Labe	ls filter:		
~ Q	\Box	Name							Docume	nt ID	Version	Modified	
Q		Letter to Joh	n Doe						858		1.1	Yesterday a	it 3:48 PM
Q		Loan_Agreen	nentAu	g_8					3321		0.2	Yesterday a	it 3:47 PM
Q		Letter to Mr 3	Х						833		0.23	Yesterday a	it 3:47 PM
Q		Arrangement	t Letter Do	csCor	p with re	ferences (2))		1813		1.0	Yesterday a	it 3:45 PM
۹ (Demo for JT							1890		0.6	Yesterday a	it 2:51 PM
Q	pdf_	Contentwork	er White F	aper ·	- Security	and Permi	ssions		1014		0.2	Yesterday a	it 2:51 PM
1		Screenshots	of slides fr	om Ki	im ¥				10685		0.4	Yesterday a	it 1:24 PM
Q		Letter to C							693		0.6	June 13, 20	17
Q		Letter to Mrs	В						688		0.4	June 13, 20	17
Q		Letter to E							712		0.2	June 13, 20	17

4.2 Checked out to Office 365 matter document view

Checked-out to Office 365 documents will appear as a view on the matter start page.



Start	Documents	Det	ails C	Calendar	Tasks C	Correspondence	Notes [Discussions	Finance	
MATTER		rs								
3 docume	nt(s) with review	date wi	ithin 7 day	s or passed	d due. (Total 3 do	ocument(s) with review	date).			
Documents	and e-mails	Only do	ocuments	Only e-n	nails Docume	nts with review date	Checked out	to Office 36	5	
\square	Name		Doc ID	Version	Document Type	Document Date	Checked Ou	ıt	Checked Out By	1
	Letter to John Doe.docx		858	1.2	Correspondence	e Tuesday	Yesterday a	at 2:10 PM	CWAdmin	
	Letter to Mr X.docx		833	0.24	Correspondence	e Tuesday	Yesterday a	at 2:10 PM	CWAdmin	
	Demo for JT.docx		1890	0.7	Correspondence	e Tuesday	Tuesday at	2:57 PM	CWAdmin	
	Screenshots o slides from Kim.docx	f	10685	0.5	Correspondenc	e Tuesday	Tuesday at	2:48 PM	CWAdmin	
	Agreement fo asset sale.doc		734	0.5	Agreement	December 19, 2017	February 19	9 (CWAdmin	

Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002)

Checked Out to Office 365 documents will be also displayed in all other document views together with other documents – on Contentworker start page and the matter workspace.

	ADMINISTRATION																1
O Form	npipe.	Home										Search o	all matters			۶	2
CTIT AB F Test	AJAX NV General advice	BAAS Client (w Matt	BARLEY Aquire HAPPY HC	INSURANCE DPS Merger with Pr		WILE E. COY Wile E Coyote		ZOOB Insolve	RACKET						
o to matter		DOCUM	VIENT R	REVIEW DA	TES												
Saved Searches My Recent Matters My Favourite Matters My Favourite Matters Matters I am responsi Matters I own		۹ [л с	vith review da lame vriginal Qualit	ate: All	t.doc 🗐	Document Typ	e Review	Due within the r Date↓ from now	next 30	Mat	ter Responsi rik Svensso		Created B Henrik Sv	·	C Z	
				IATTERS				ENT DOCUME									
		Show My Favourite		Client	Matter	Last Update↓	Documents	and e-mails (Only documents		Doc ID	Version	Document	Type M	lodified↓		
		*		Insurance Corp Inc (100016)	Merger with Professional Insurance Ltd (0002)	About an hour ago		Letter to Mr X.o	locx		833	0.23	Correspon			our ago	2
		*		BAAS Cars (100002)	Client Overview Matter (overview)	Yesterday at 12:49 PM	6	Letter to John (Doe.docx		858	1.1	Correspon	idence Al	bout an h	our ago	2
		*		Zoobracket (100003)	Insolvency (0002)	Monday at 3:23 PM		Loan Agreeme	ntAug_8.DOC	x 🗐	3321	0.2	Correspon	idence Tu	iesdav at	2:47 PM	м
		*		Wile E. Coyote (000100)	Wile E Coyote vs Acme Inc. (0001)	Monday at 3:17 PM	•=	coang greenie			5521	012	concipon		.c.s.dy ut		
lide empty Document	Types	*		BARLEY (100005)	Aquire HAPPY HOPS	March 3		Arrangement L with references		-	1813	1.0	Correspon	idence Tu	uesday at	2:45 PN	N



4.3 Collaborate on externally checked out document

1. Use the secure link from the email to open the Office 365 team site folder with shared documents.

	Bcc				
	Subject	CWAdmin shared documents with you			
		aenab.sharepoint.com/:f:/s/100016-0002/EtY7miF5nwBKpCBATQnnXBwB_RwMzGvtvCXoca8m0 dit doouments in the shared folder.	<u>c COg</u> .	n case	you need
()	nttps://traenab.s	narepoint.com/sites/100016-000 🔎 – 🔒 C 🕼 Insurance Corp Inc - Merge 🗙		-	□ × ☆☆戀 ©
::: Sharel	Point	♀ Search this library	Q	٢	? (T)
	Insura	nce Corp Inc - Merger with Professional Insurance Ltd		☆ Not	following

						\sim
IC	Insurance Corp Inc - Merg Private group	er with Profe	essional Insurar	nce Ltd 🧳	☆ Not follov ♀ 1 men	-
$+$ New \smallsetminus	⊤ Upload ∨ 🖻 Share 💿 Copy link 🚑 Sy	nc 🕹 Download 🖷	Export to Excel	\equiv All Documents \vee	7 0	2
Docume	ents > Shared folder 2020-03-11 1410	43				^
Ľ	▶ Name ∨	Modified \smallsetminus	Modified By \searrow			
	833 - Letter to Mr X.docx	Yesterday at 2:10 PM	Testuser3			
	858 - Letter to John Doe.docx	Yesterday at 2:10 PM	Testuser3			
						~

2. Document properties popup also includes sharing status (i.e. who shared, when and where to). Clicking on the link in the "yellow bar" will open the document in Office 365.



Corresponden	ce - Letter	to John D	oe.docx		×
VIEW EXTRA					
Edit Item Manage	Permissions	♣ Alert Me ঔ Workflows ᠌ Move to	Copy to Select Document Add to Virtual Folder Actions		
This document is - Yesterday at 2:1		to 858 - Letter	to John Doe.docx by CWA	Admin	^
,,					
Name Title	Letter to Jol	hn Doe.docx			
Client Code	100016				
Client Name	Insurance C	orp Inc			
Matter Code	0002				
Matter Name	Merger with	n Professional II	nsurance Ltd		
Practice Area	Mergers &	Acquisitions			
Counterparties	Professiona	Insurance			
Other Parties					
Document Type	Correspond	ence			
Document Date	3/10/2020				
Review Date					
Comment					
Source					
Status	Active				
Labels					ł
Document ID	858				\sim
Content Type: Docur	nant With Tam	alata			

- 3. You could use the reach functionality of Office 365 SharePoint Online to collaborate on the document with an external party:
 - Editing document in browser (for Office documents)
 - Coauthoring features (for office documents)
 - \circ $\;$ Document version history to check all changes made by the external party
 - \circ \quad Document preview in browser to view the latest version
 - And many more



4.4 Check In from Office 365

Check-in from Office 365 will upload the latest document version from Office 365 as a new version in Contentworker and release the lock. The shared document will be removed from Office 365 team site folder and the external party will no longer possible to access it.

You would likely want to check shared document content before checking in. To find the document please use the secured link you've sent to the external party or the link in the "yellow bar" on the document properties popup.

1. Navigate to a document type folder, select document(s) that you want to check in and click the "Check In from Office 365" ribbon button.

Contentworker								Newsfeed
NAVIGATE ADMINISTRATION MATTER FILES LIBI	RARY							
 New Document Upload Document New Folder New Open & Check Out Manage 	i ⊂ i ⊂ i 33 5 ×		65	Check In from Office		Duplicate Copy Dow Document to C	mload a Select Copy Copies	Copy as a Send T Link KHR
	AS CARS nt Overvie	BARLEY w Matt Aquire HAPPY	HOPS	INSURANCE CO Merger with Prof		WILE E. COYO Wile E Coyote vs		BRACKET ency
	nce Corp I spondence	nc (100016) / Merger with F	Profession	al Insurance Ltd (0	002)			
Star	t Doc	uments Details Ca	lendar	Tasks Corre	sponden	ce Notes D	iscussions Fi	nance
→ Wy Recent Matters All Doc	uments	Hide Folders 🛛 🚥	Find a fil	le	Q	Labels filter:		
· · · · ·	২ 🗅	Name		Document ID	Version	Modified	Modified By	Document [
Ajax NV (1025)	२ 💼	Letter to John Doe		858	1.1	Tuesday at 3:48 PM	CWAdmin	Tuesday
	२ 👘	Loan_AgreementAug_8		3321	0.2	Tuesday at 3:47 PM	CWAdmin	Tuesday
Insurance Corp Inc (100016)	२ 🖷	Letter to Mr X		833	0.23	Tuesday at 3:47 PM	CWAdmin	Tuesday
Greement [27]	२ 📫	Arrangement Letter DocsCo with references (2)	•rp •	1813	1.0	Tuesday at 3:45 PM	CWAdmin	Tuesday
Correspondence [12]	२ 💼	Demo for JT		1890	0.6	Tuesday at 2:51 PM	CWAdmin	Tuesday

Or use document properties popup Extra ribbon tab.



Corresponde	nce - Letter to .	John Doe.	docx	;
Duplicate Document 🏊 Se	py as a link 🖶 Print tivity History	E-mail Attachments	E-mail Links Share & Track	
This document - Yesterday at 2		8 - Letter to Jo	ohn Doe.docx by CWAdmin	^
Name Title	Letter to John Do	e.docx		
Client Code	100016			

2. Select the version type and click the "Check In" button. Shared to Office 365 document will be added as a new minor or major version in Contentworker.

Check In from	Office 365			×
Version				
Minor version	(draft)			
O Major version	(publish)			
		Check In	Cancel	

3. Wait until document(s) are processed.



Check In from Office 365	×
Processing file 2 of 2	
	F

4. Document(s) from Office 365 is added as a new version in Contentworker. The blue "check-out" icon is no longer displayed.

≡ Contentworker							Newsfeed
NAVIGATE ADMINISTRATION MATTER FIL	LES LIBRARY						
New Document Dyload Document New Folder New New Open & Check Out		E-mail E-mail Check Out tachments Links 36 Share &				nload a Select Copy Copies	opy as a Send T link KHR
ACTIT AB AJAX NV EF Test General advice	BAAS CARS Client Overview I	BARLEY Matt Aquire HAPPY F	INSURANCE IOPS Merger with Pr		WILE E. COYOT Wile E Coyote vs		RACKET noy
Go to matter	Insurance Corp Inc Correspondence	(100016) / Merger with Pi	ofessional Insurance Ltd	(0002)			
Saved Searches	Start Docum	ents Details Cal	endar Tasks Cor	respondenc	e Notes Di	iscussions Fin	ance
I → My Recent Matters	All Documents Hic	de Folders 🛛 🚥	Find a file	Q	Labels filter:		
ACTIT AB (100001)	✓ Q 🗋 N	ame	Document ID	Version	Modified	Modified By	Document I
BAAS Cars (10002)	🗸 🔍 💼 🛛	etter to Mr X	••• 833	0.24	A few seconds ago	CWAdmin	Today
BARLEY (100005)	🗸 🔍 💼 🛛	etter to John Doe	••• 858	1.2	A few seconds ago	CWAdmin	Today
Insurance Corp Inc (100016)	۵ 💼 ۱	oan_AgreementAug_8	3321	0.2	Tuesday at 3:47 PM	CWAdmin	Tuesday
Herger with Professional Insurance		rrangement Letter DocsCor vith references (2)	p ••• 1813	1.0	Tuesday at 3:45 PM	CWAdmin	Tuesday
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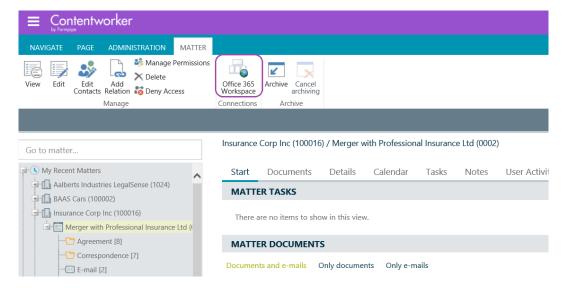


5 Sharing Portal – Office 365 Matter Workspace.

A separate SharePoint Online Team Site that can be created from Contentworker and associated with a matter. This site is used to store documents shared with Share to Office 365, Check Out to Office 365 features. You can also use it to upload and collaborate on documents from any other location.

5.1 Access Office 365 Matter Workspace

 Navigate to a matter you want to create/access Office 365 Workspace and click the "Office 365 Workspace" ribbon button.



2. You might be asked to connect the matter to Office 365 in case the Workspace has not been created yet; Share to Office 365 or Check Out to Office 365 has not been performed on this matter workspace before. Click "Connect now" to continue to create Office 365 Workspace. This will create the Office 365 team site automatically on the fly and associate it with the matter.



Office 365 Workspace: Merger with Pro	fessional Ins	ura	×
The matter is not connected to Office 365 yet.			
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	Connect now	Cancel	

3. Internet Explorer browser might be configured to block pop-ups. If so, please click "Always allow".

		Always allow
Internet Explorer blocked a pop-up from fpcwdemo.24-timmar.se.	Allow once Options for this site 🔻	More settings

4. You might be asked to enter your corporate Office 365 account credentials when you access Office 365 Workspace for the first time. If you don't know what account to use or don't have one, please contact your IT department.

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5. Wait until the process is finished.





6. Office 365 Workspace will be created. Click the "Open workspace" button to navigate to Office 365 Team Site.

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	Open workspace Close	

7. Team Site will be opened in a separate browser tab and you will immediately get access to it.

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If you are the matter Owner or Responsible then you will be assigned Owner role on the Team Site. Otherwise, a Member role will be assigned.



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You can now upload documents to the Team Site from any location and use Office 365 SharePoint Online Team Site reach functionality to collaborate with your colleagues or external parties.

You can also add Microsoft Teams to collaborate in real-time and share documents and other content across Microsoft 356 with your team.

