

Contentworker.

Documents Collaboration and Sharing

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Formpipe.

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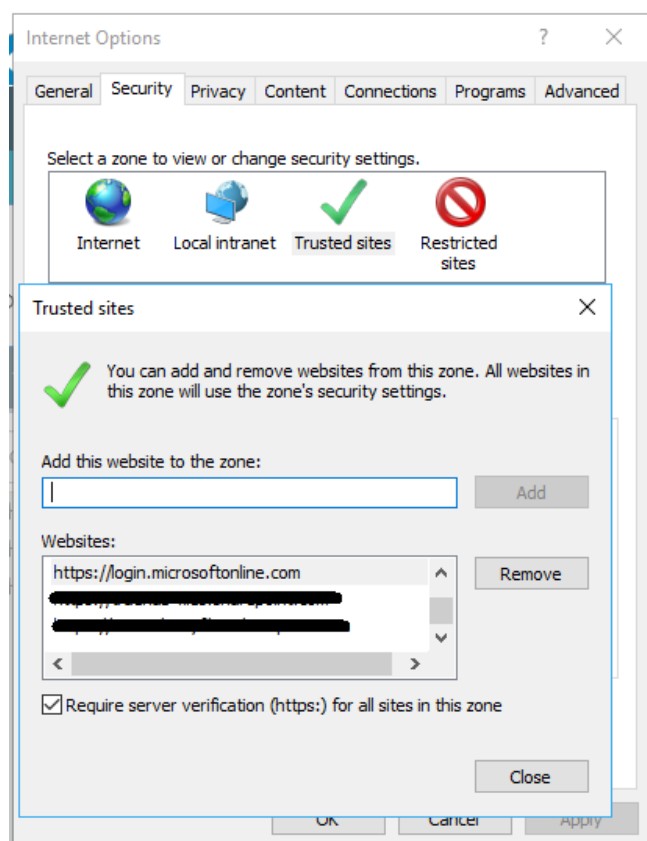
1 About this guide.

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

2 Before you start.

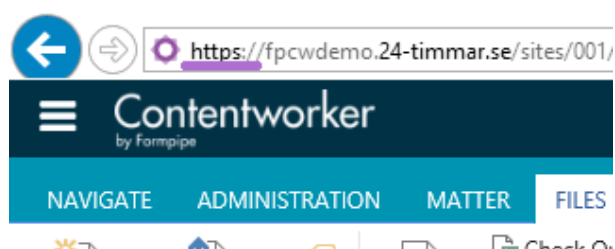
2.1 Configure Trusted sites Zone in Internet Explorer

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



2.2 Use HTTPS connection

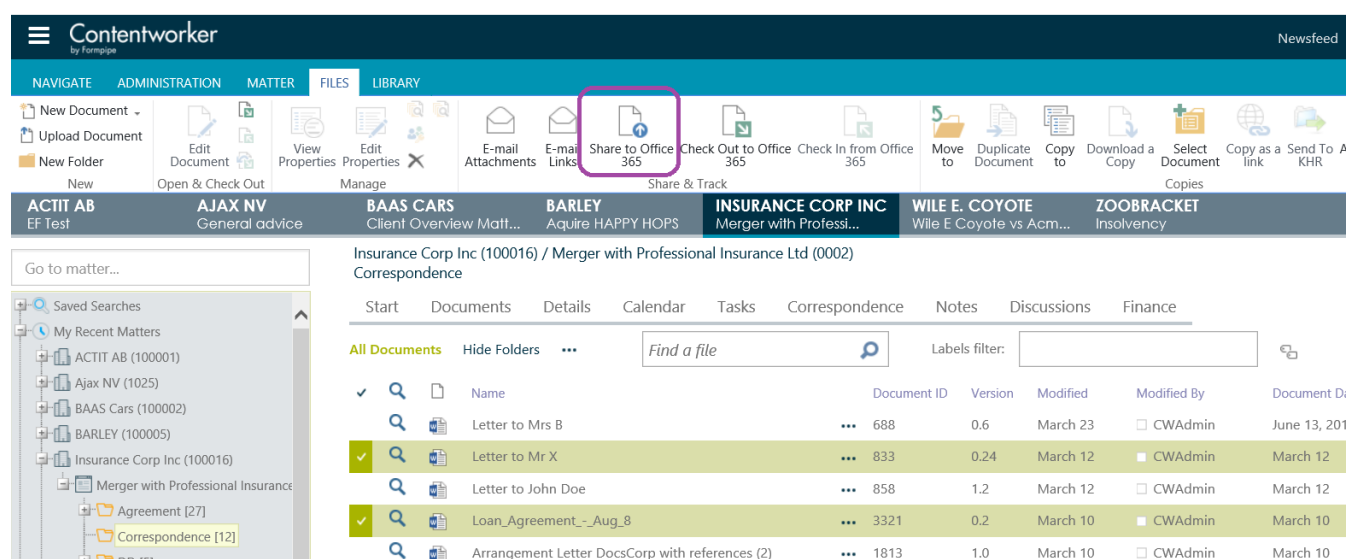
Be sure Contentworker site connection is secure – Contentworker site is opened under HTTPS protocol in a web browser.



3 Document sharing with an external party.

3.1 Share to Office 365

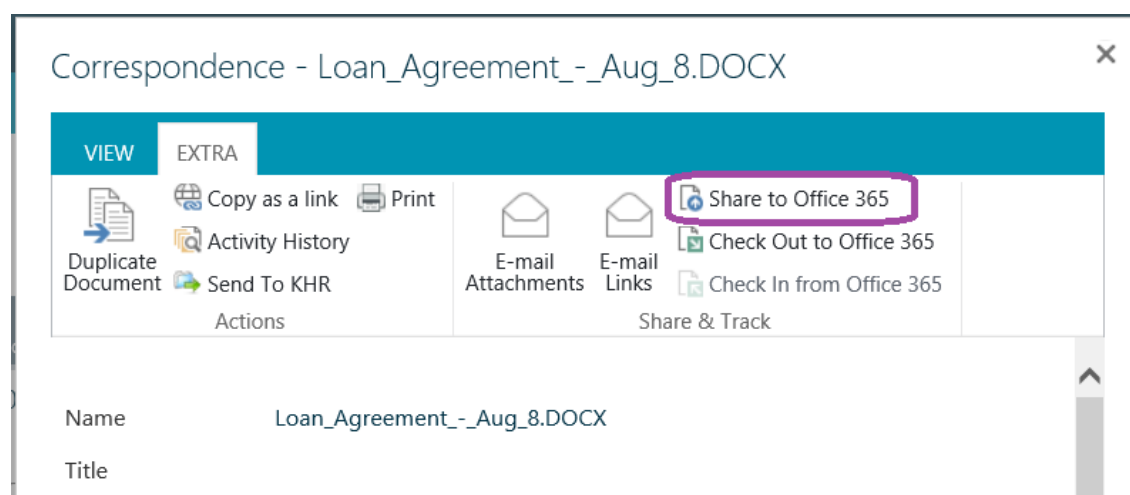
1. Navigate to a document type folder, select document(s) that you want to share with an external party and click the “Share to Office 365” ribbon button.



The screenshot shows the Contentworker interface. The top navigation bar includes 'NAVIGATE', 'ADMINISTRATION', 'MATTER', 'FILES', and 'LIBRARY'. The 'FILES' ribbon is active, and the 'Share to Office 365' button is highlighted with a red box. Below the ribbon, the 'Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002)' matter is selected. The 'Correspondence' tab is active, showing a list of documents. The 'Share to Office 365' button is also highlighted in the 'Share & Track' section of the ribbon.

Name	Document ID	Version	Modified	Modified By	Document Date
Letter to Mrs B	688	0.6	March 23	CWAdmin	June 13, 201
Letter to Mr X	833	0.24	March 12	CWAdmin	March 12
Letter to John Doe	858	1.2	March 12	CWAdmin	March 12
Loan_Agreement_-_Aug_8	3321	0.2	March 10	CWAdmin	March 10
Arrangement Letter DocsCorp with references (2)	1813	1.0	March 10	CWAdmin	March 10

Or use document properties popup Extra ribbon tab.



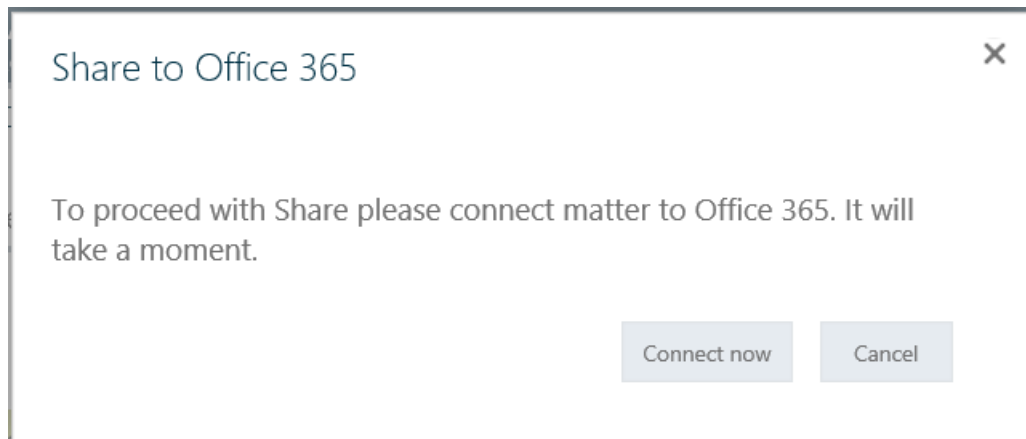
The screenshot shows the document properties popup for 'Loan_Agreement_-_Aug_8.DOCX'. The 'EXTRA' ribbon is active, and the 'Share to Office 365' button is highlighted with a red box. The popup also shows the 'VIEW' ribbon with options like 'Duplicate Document', 'Activity History', and 'Send To KHR'. The document name and title are displayed at the bottom.

Name: Loan_Agreement_-_Aug_8.DOCX

Title:

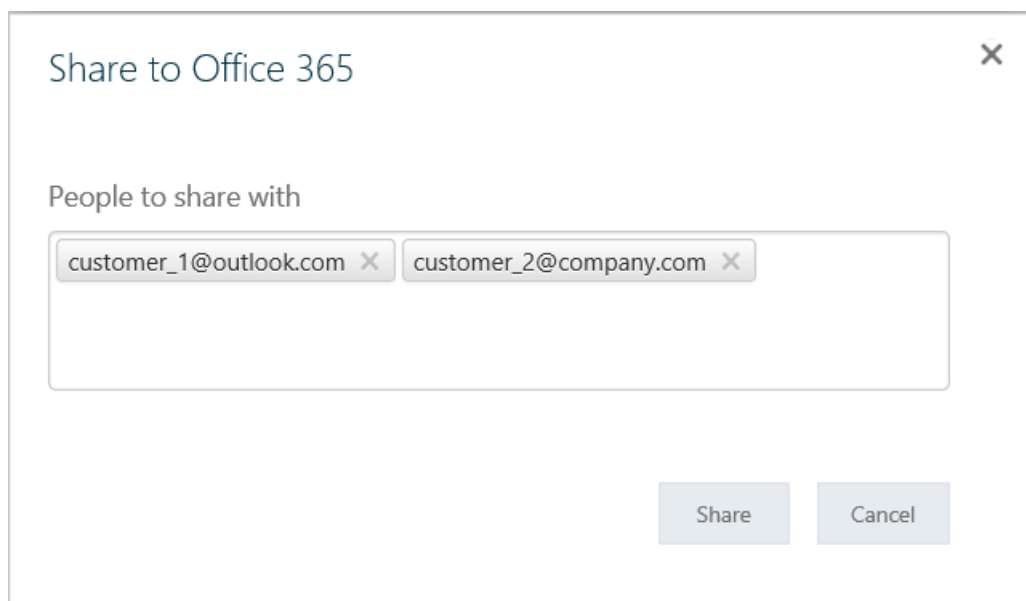
2. You might be asked to connect the matter to Office 365 in case Share to Office 365 or Check Out to Office 365 has not been performed on this matter workspace before. Click “Connect now”

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



A dialog box titled "Share to Office 365" with a close button (X) in the top right corner. The main text reads: "To proceed with Share please connect matter to Office 365. It will take a moment." At the bottom right, there are two buttons: "Connect now" and "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.



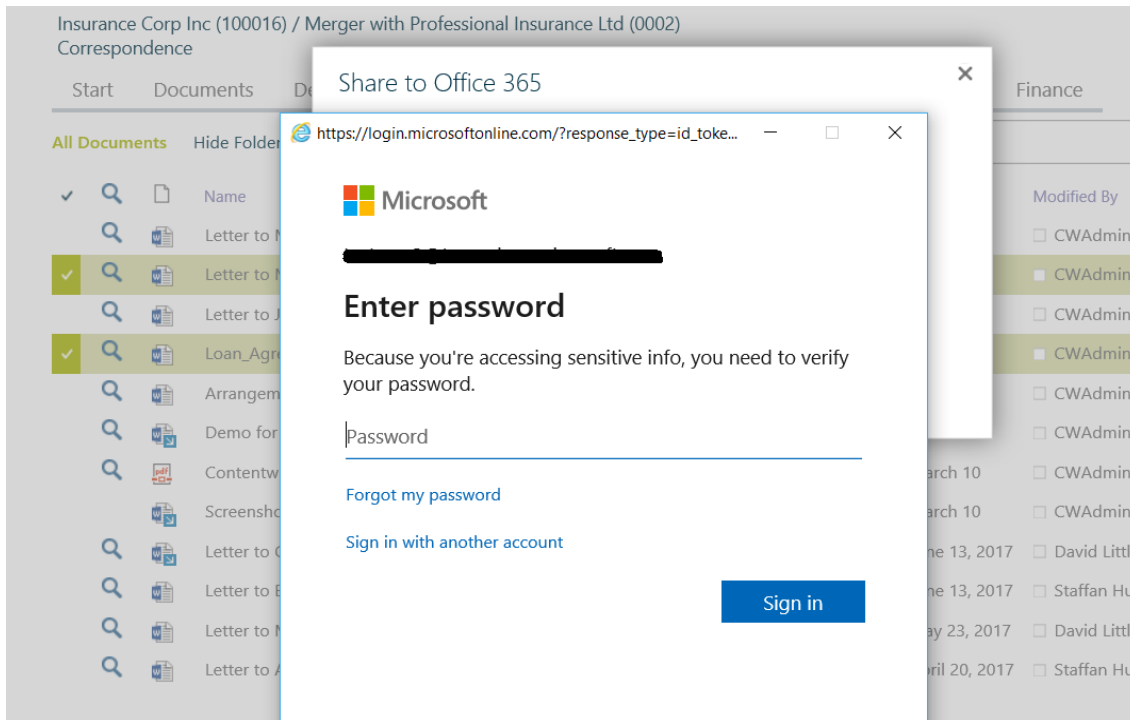
A dialog box titled "Share to Office 365" with a close button (X) in the top right corner. Below the title is the label "People to share with". There is a text input field containing two email addresses: "customer_1@outlook.com" and "customer_2@company.com", each with a small 'X' icon to its right. At the bottom right, there are two buttons: "Share" and "Cancel".

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

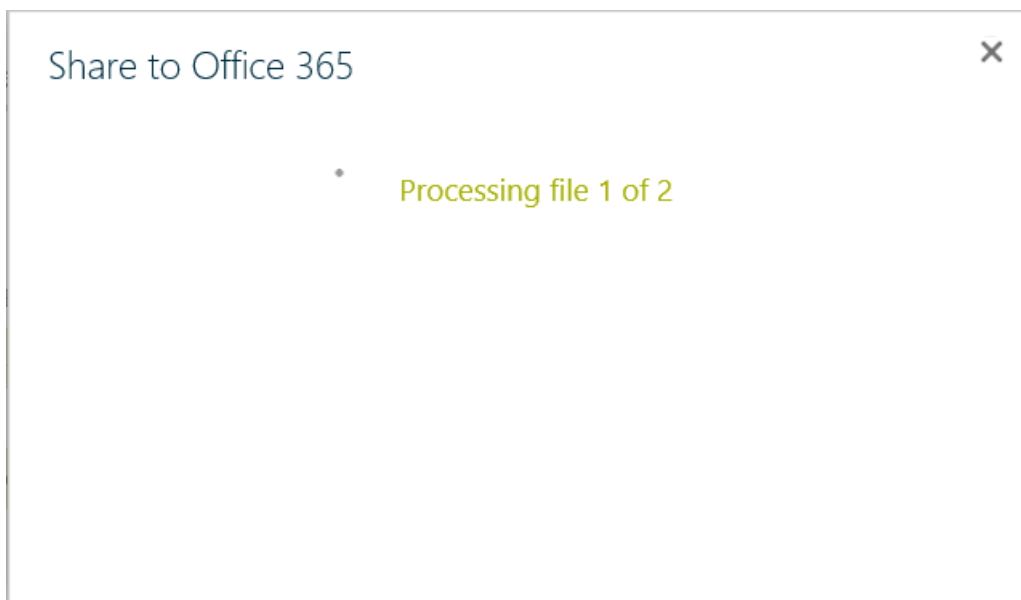


A notification bar from Internet Explorer. On the left, it says "Internet Explorer blocked a pop-up from fpcwdemo.24-timmar.se." In the center, there are two buttons: "Allow once" and "Options for this site" (with a dropdown arrow). On the right, there are two buttons: "Always allow" and "More settings".

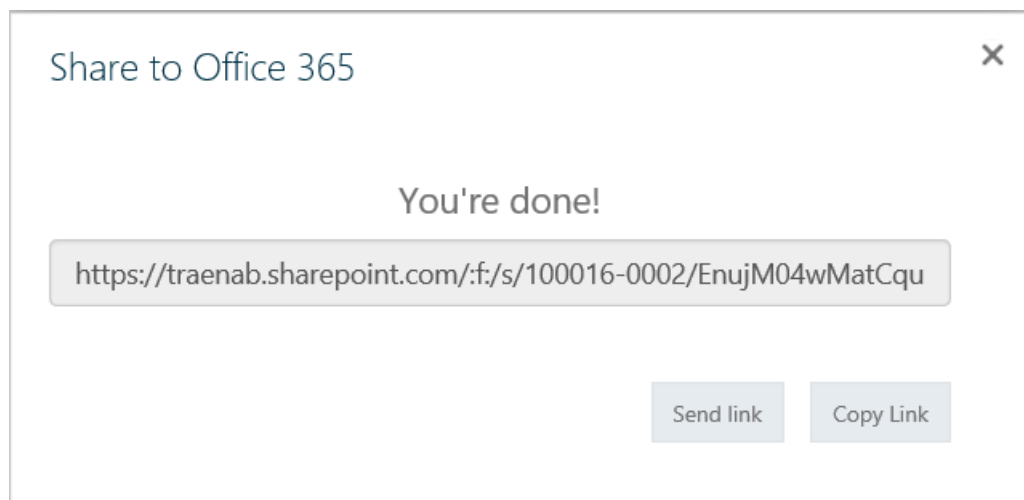
5. You might be asked to enter your corporate Office 365 account credentials when you Share to Office 365 for the first time. If you don't know what account to use or don't have one, please contact your IT department.



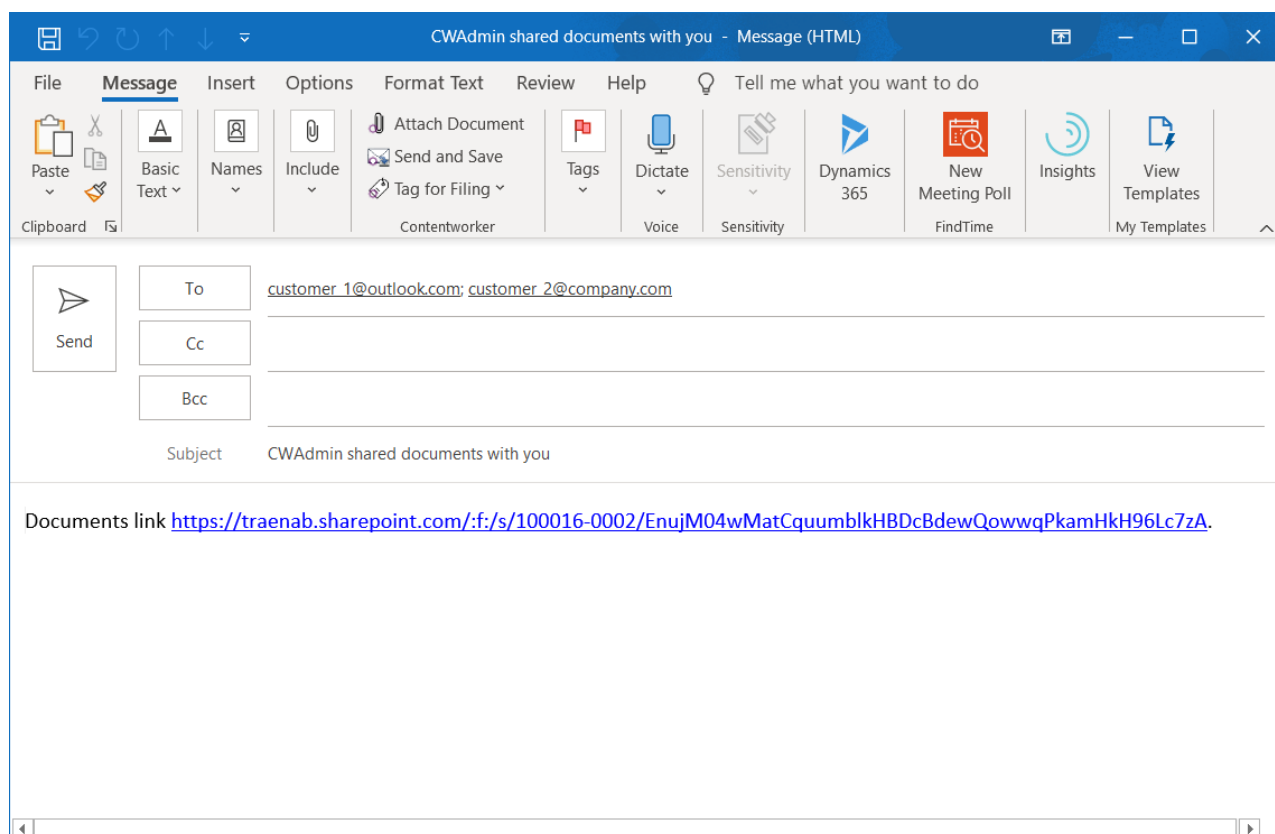
6. Wait until document(s) are processed.



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.



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.

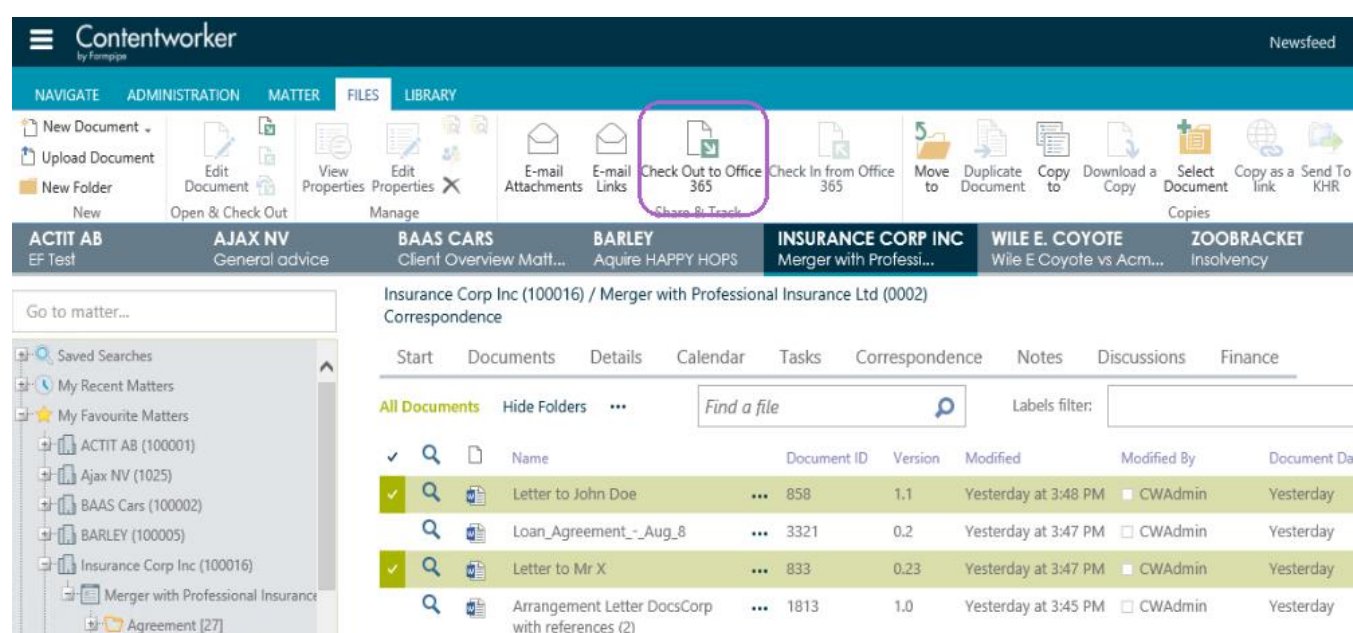


Only you (using your corporate Office 365 account) and an external party will be allowed to access documents by secure link. A secure link allows you to view or download shared documents.

4 Document collaboration with an external party.

4.1 Check Out to Office 365

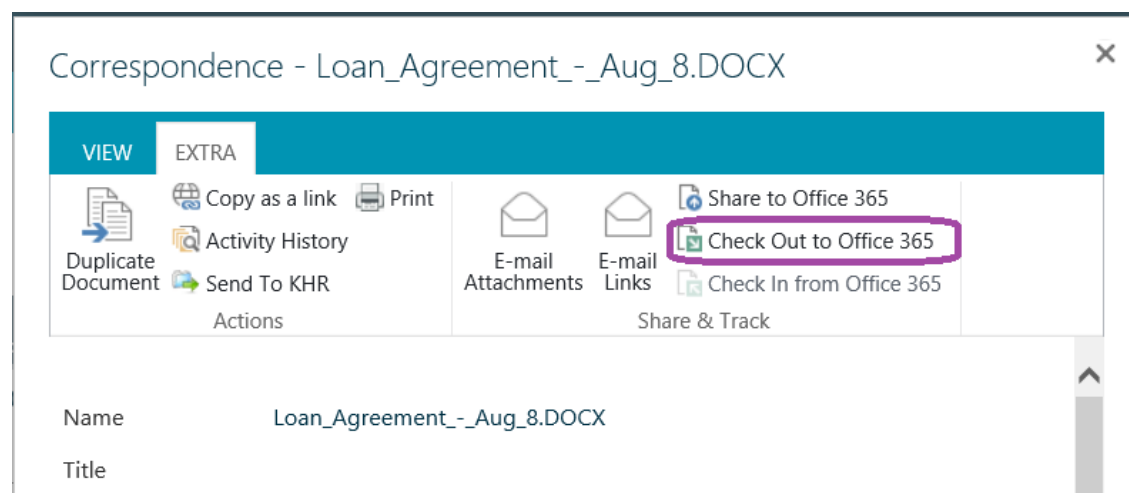
1. Navigate to a document type folder, select document(s) that you want to share with an external party and click "Check Out to Office 365" ribbon button.



The screenshot shows the Contentworker interface. The top navigation bar includes 'NAVIGATE', 'ADMINISTRATION', 'MATTER', 'FILES', and 'LIBRARY'. The 'FILES' ribbon is active, and the 'Check Out to Office 365' button is highlighted with a red box. Below the ribbon, the 'Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002)' matter is selected. The 'Correspondence' tab is active, and a table of documents is displayed:

Name	Document ID	Version	Modified	Modified By	Document Date
Letter to John Doe	858	1.1	Yesterday at 3:48 PM	CWAdmin	Yesterday
Loan_Agreement_-_Aug_8	3321	0.2	Yesterday at 3:47 PM	CWAdmin	Yesterday
Letter to Mr X	833	0.23	Yesterday at 3:47 PM	CWAdmin	Yesterday
Arrangement Letter DocsCorp with references (2)	1813	1.0	Yesterday at 3:45 PM	CWAdmin	Yesterday

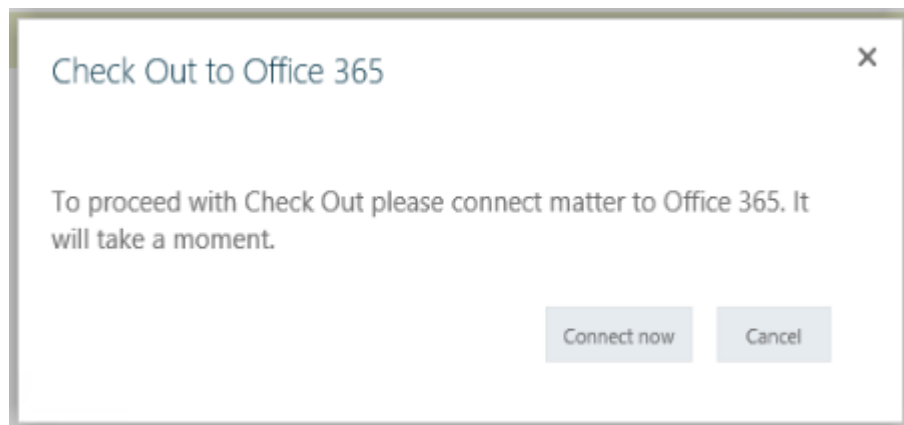
Or use document properties popup Extra ribbon tab.



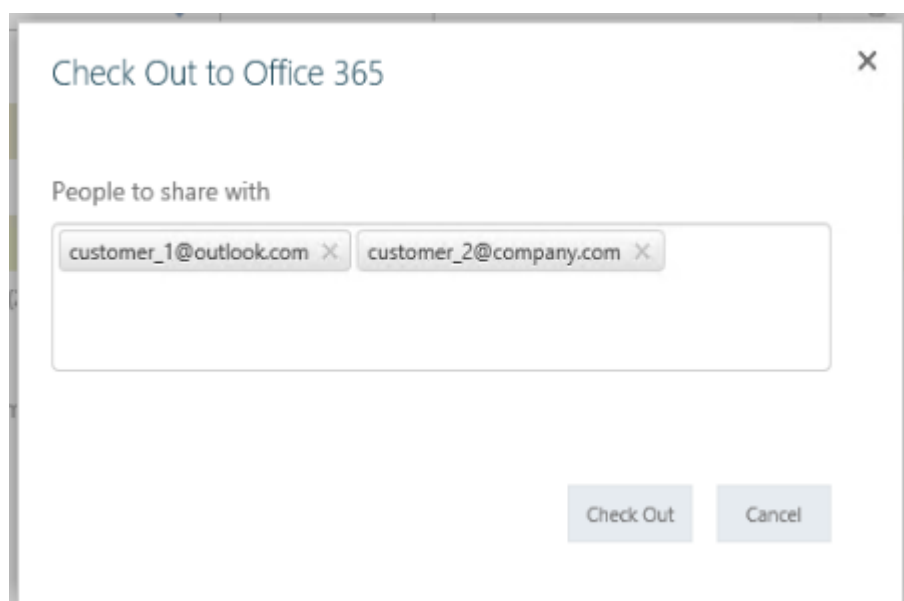
The screenshot shows the 'Correspondence - Loan_Agreement_-_Aug_8.DOCX' document properties popup. The 'EXTRA' ribbon is active, and the 'Check Out to Office 365' button is highlighted with a red box. The popup also displays the document name and title:

Name: Loan_Agreement_-_Aug_8.DOCX
Title:

- 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.



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

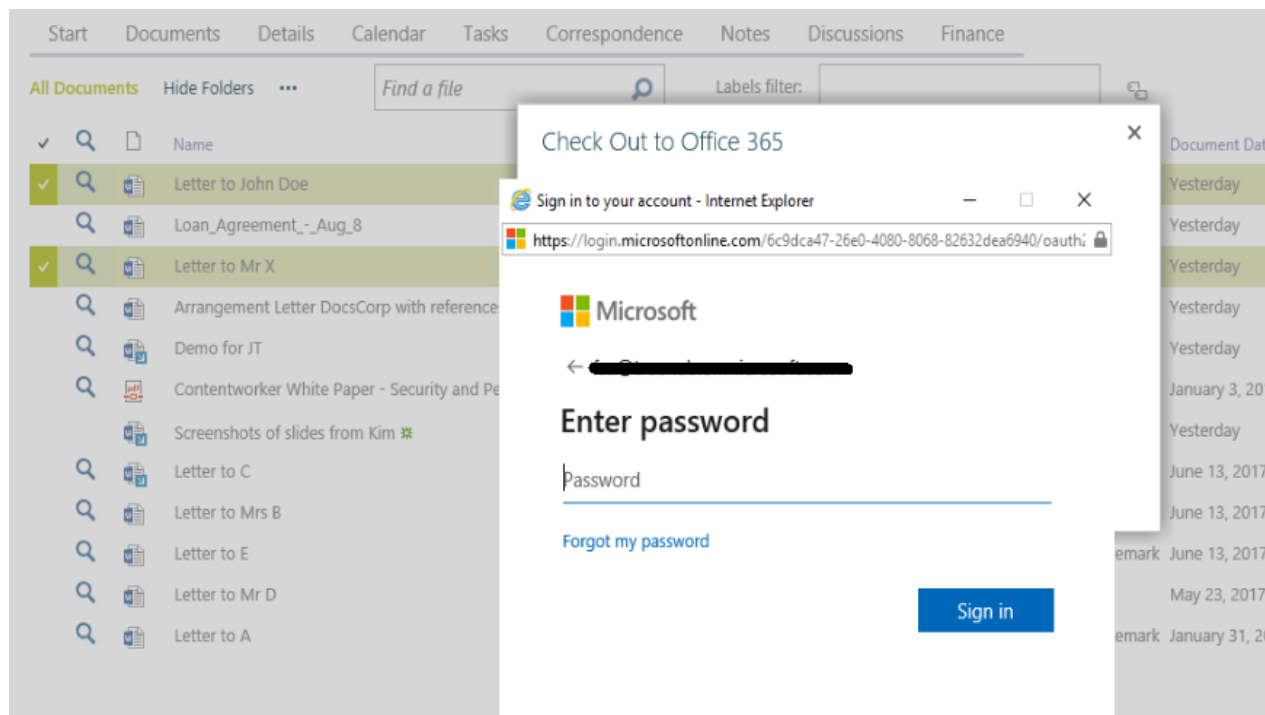


- Internet Explorer browser might be configured to block pop-ups. If so, please click "Always allow".

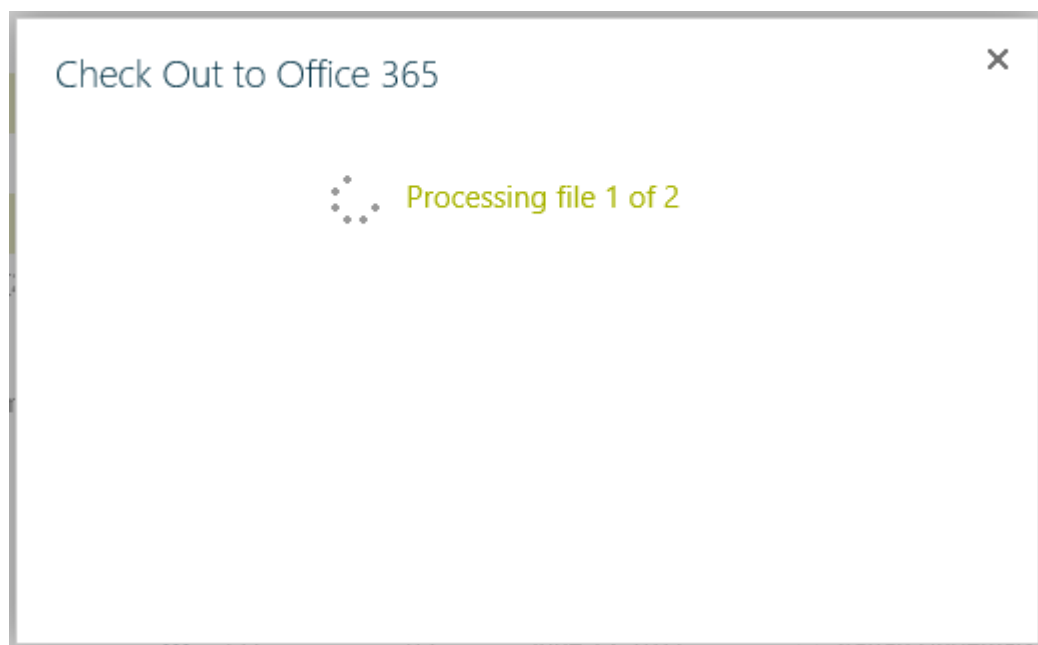


- You might be asked to enter your corporate Office 365 account credentials when you Check out to Office 365 for the first time. If

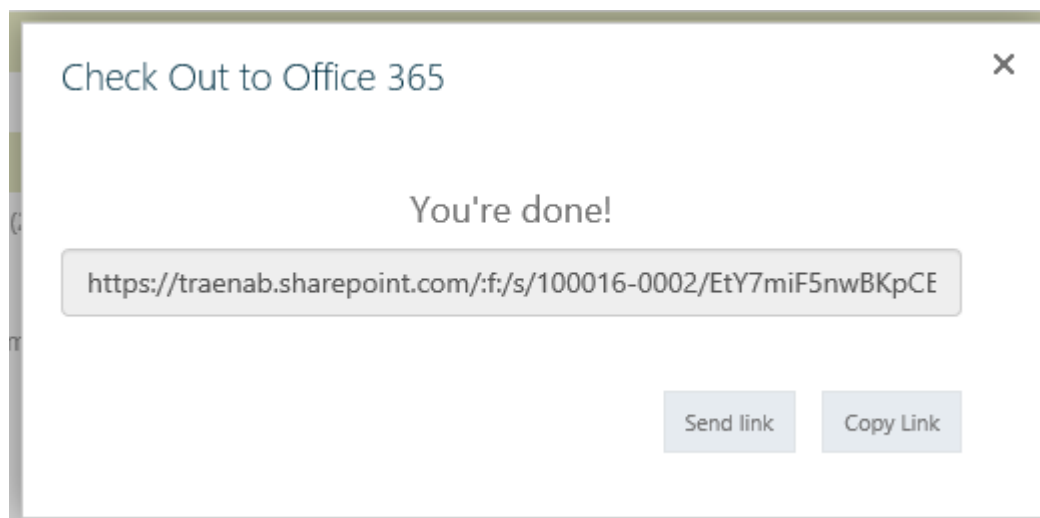
you don't know what account to use or don't have one, please contact your IT department.



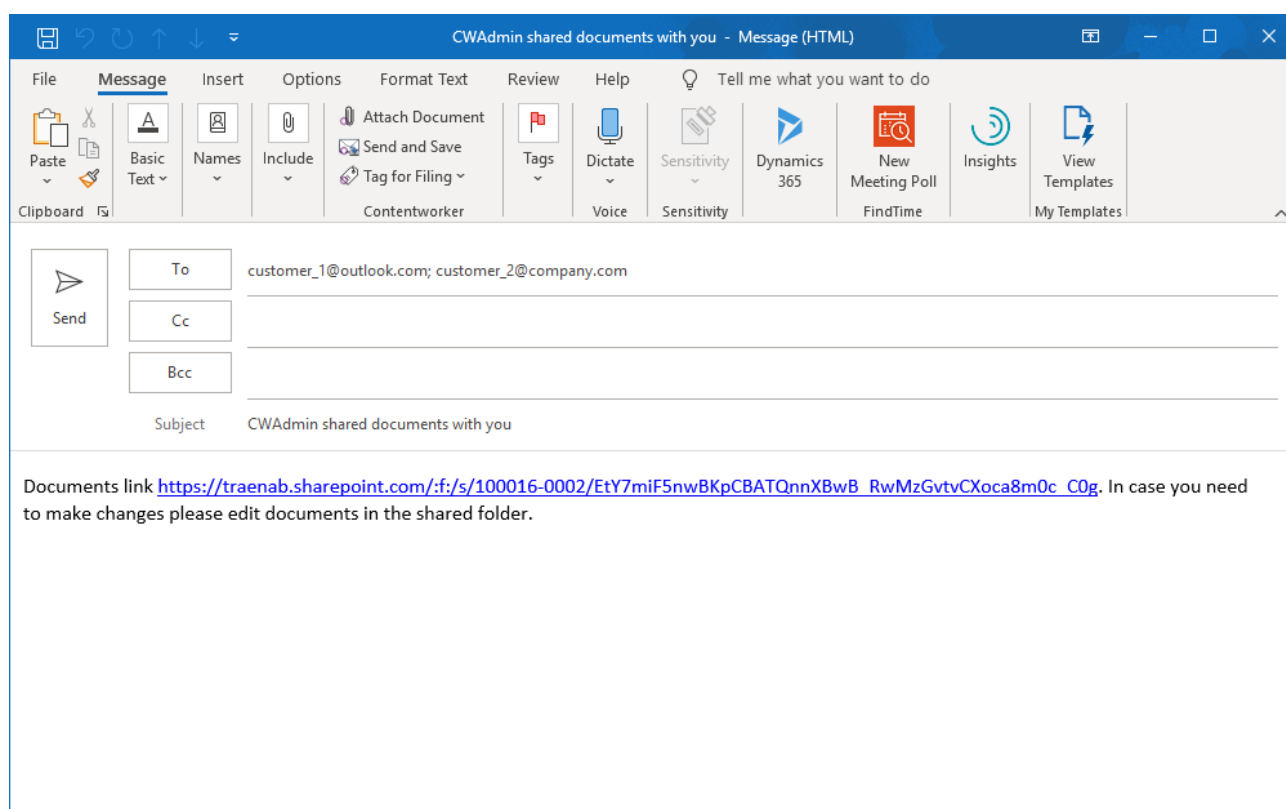
6. Wait until document(s) are processed.



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.



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.













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.

8. 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.

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

Start Documents Details Calendar Tasks Correspondence Notes Discussions Finance

All Documents Hide Folders ... Find a file Labels filter:

		Name		Document ID	Version	Modified
✓		Letter to John Doe	...	858	1.1	Yesterday at 3:48 PM
		Loan_Agreement_-_Aug_8	...	3321	0.2	Yesterday at 3:47 PM
		Letter to Mr X	...	833	0.23	Yesterday at 3:47 PM
		Arrangement Letter DocsCorp with references (2)	...	1813	1.0	Yesterday at 3:45 PM
		Demo for JT	...	1890	0.6	Yesterday at 2:51 PM
		Contentworker White Paper - Security and Permissions	...	1014	0.2	Yesterday at 2:51 PM
		Screenshots of slides from Kim ✱	...	10685	0.4	Yesterday at 1:24 PM
		Letter to C	...	693	0.6	June 13, 2017
		Letter to Mrs B	...	688	0.4	June 13, 2017
		Letter to E	...	712	0.2	June 13, 2017

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.

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

Start Documents Details Calendar Tasks Correspondence Notes Discussions Finance

MATTER DOCUMENTS

3 document(s) with review date within 7 days or passed due. (Total 3 document(s) with review date).

Documents and e-mails Only documents Only e-mails Documents with review date **Checked out to Office 365**


	Name	Doc ID	Version	Document Type	Document Date	Checked Out	Checked Out By	
	Letter to John Doe.docx	858	1.2	Correspondence	Tuesday	Yesterday at 2:10 PM	CWAdmin	
	Letter to Mr X.docx	833	0.24	Correspondence	Tuesday	Yesterday at 2:10 PM	CWAdmin	
	Demo for JT.docx	1890	0.7	Correspondence	Tuesday	Tuesday at 2:57 PM	CWAdmin	
	Screenshots of slides from Kim.docx	10685	0.5	Correspondence	Tuesday	Tuesday at 2:48 PM	CWAdmin	
	Agreement for asset sale.docx	734	0.5	Agreement	December 19, 2017	February 19	CWAdmin	

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.

Contentworker

Newsfeed OneDrive Sites CWAdmin ?

NAVIGATE PAGE ADMINISTRATION



Home

Search all matters

ACTIT AB EF Test

AJAX NV General advice

BAAS CARS Client Overview Matt...

BARLEY Acquire HAPPY HOPS

INSURANCE CORP INC Merger with Professi...

WILE E. COYOTE Wile E Coyote vs Acme...

ZOOBRACKET Insolvency

Go to matter...

Saved Searches

My Recent Matters

My Favourite Matters

Matters I am responsible for

Matters I own

DOCUMENT REVIEW DATES

Show documents with review date: All Date Range: Due within the next 30 days

Name	Document Type	Review Date	Matter Responsible	Created By	Client
Original Quality Bonds Document.doc	Agreement	6 days from now	Henrik Svensson	Henrik Svensson	Zoo...

MY RECENT MATTERS

Show My recent matters

Favourite	Tab	Client	Matter	Last Update
★	<input checked="" type="checkbox"/>	Insurance Corp Inc (100016)	Merger with Professional Insurance Ltd (0002)	About an hour ago
★	<input checked="" type="checkbox"/>	BAAS Cars (100002)	Client Overview Matter (overview)	Yesterday at 12:49 PM
★	<input checked="" type="checkbox"/>	Zoo bracket (100003)	Insolvency (0002)	Monday at 3:23 PM
★	<input checked="" type="checkbox"/>	Wile E. Coyote (000100)	Wile E Coyote vs Acme Inc. (0001)	Monday at 3:17 PM
★	<input checked="" type="checkbox"/>	BARLEY (100005)	Acquire HAPPY HOPS	March 3

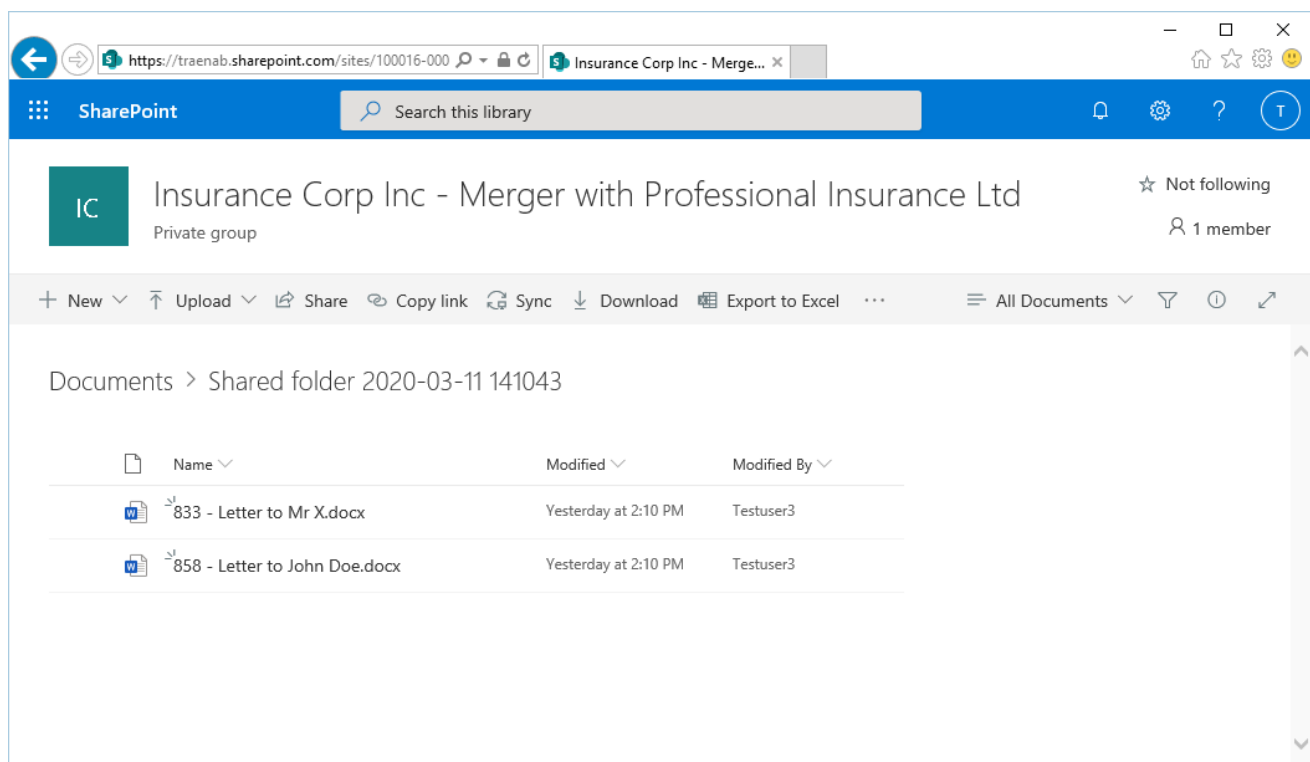
MY RECENT DOCUMENTS

Documents and e-mails Only documents

Name	Doc ID	Version	Document Type	Modified
Letter to Mr X.docx	833	0.23	Correspondence	About an hour ago
Letter to John Doe.docx	858	1.1	Correspondence	About an hour ago
Loan_Agreement_-_Aug_8.DOCX	3321	0.2	Correspondence	Tuesday at 2:47 PM
Arrangement Letter DocsCorp with references (2).docx	1813	1.0	Correspondence	Tuesday at 2:45 PM

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.



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.

Correspondence - Letter to John Doe.docx

VIEW

EXTRA

Edit Item

Version History

Alert Me

Copy to

Manage Permissions

Workflows

Select Document

Delete Item

Move to

Add to Virtual Folder

Manage

Actions

This document is checked-out to 858 - Letter to John Doe.docx by CWAdmin - Yesterday at 2:10 PM

Name

Letter to John Doe.docx

Title

Client Code

100016

Client Name

Insurance Corp Inc

Matter Code

0002

Matter Name

Merger with Professional Insurance Ltd

Practice Area

Mergers & Acquisitions

Counterparties

Professional Insurance

Other Parties

Document Type

Correspondence

Document Date

3/10/2020

Review Date

Comment

Source

Status

Active

Labels

Document ID

858

Content Type: Document With Template

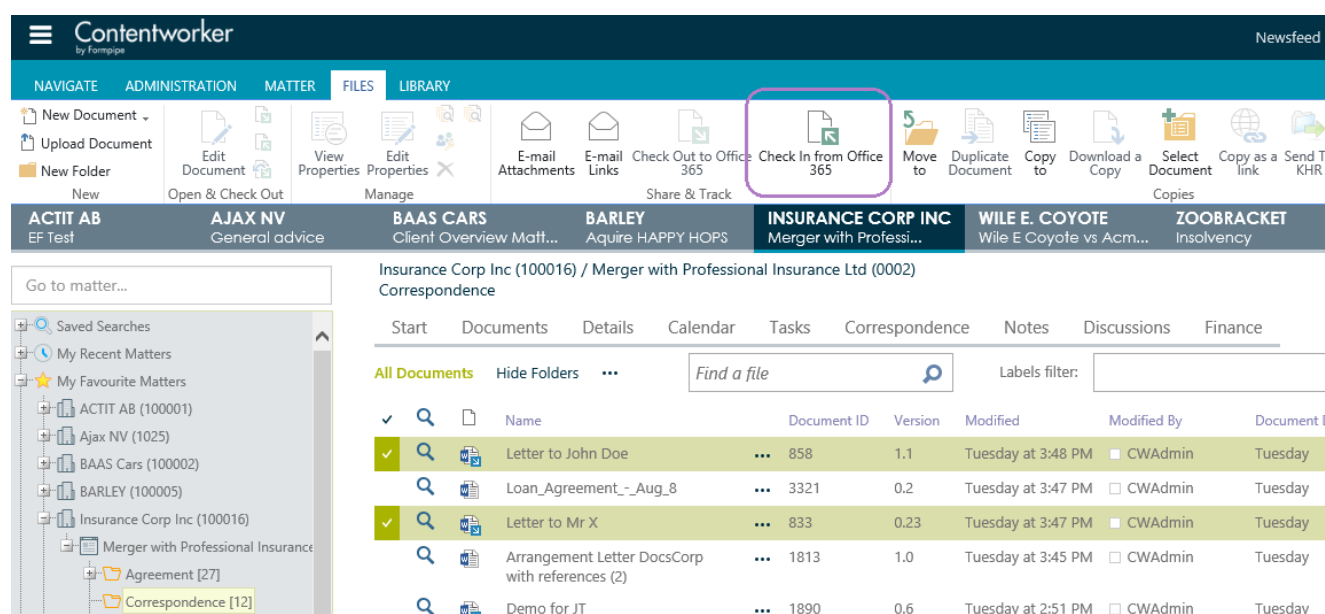
3. You could use the reach functionality of Office 365 SharePoint Online to collaborate on the document with an external party:
 - Editing document in browser (for Office documents)
 - Coauthoring features (for office documents)
 - Document version history to check all changes made by the external party
 - 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 be 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.

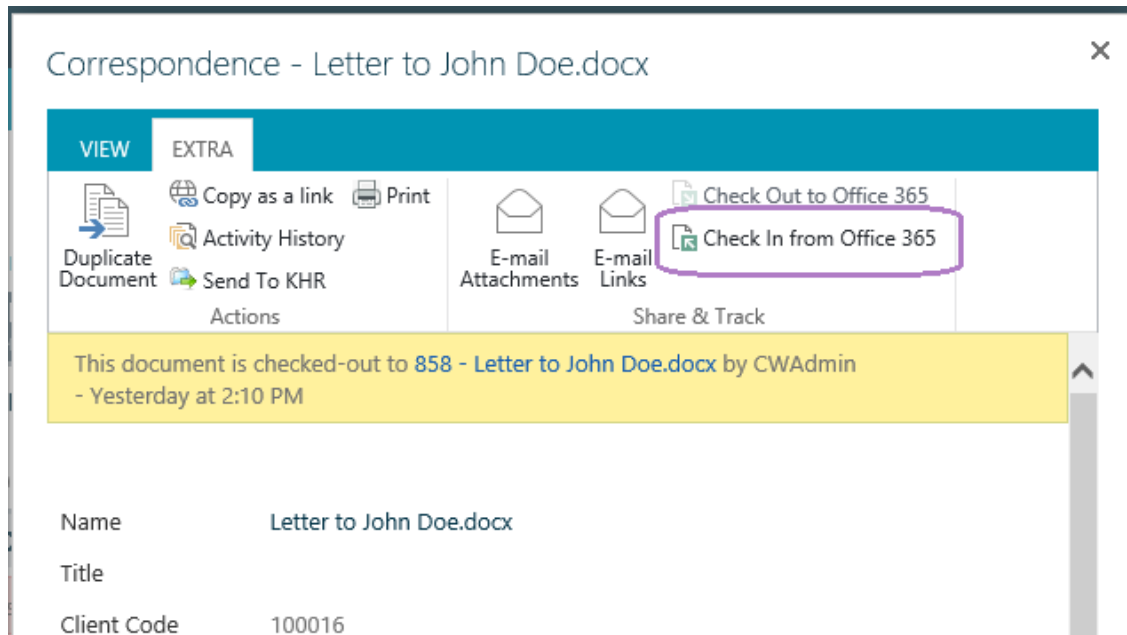
1. Navigate to a document type folder, select document(s) that you want to check in and click the "Check In from Office 365" ribbon button.



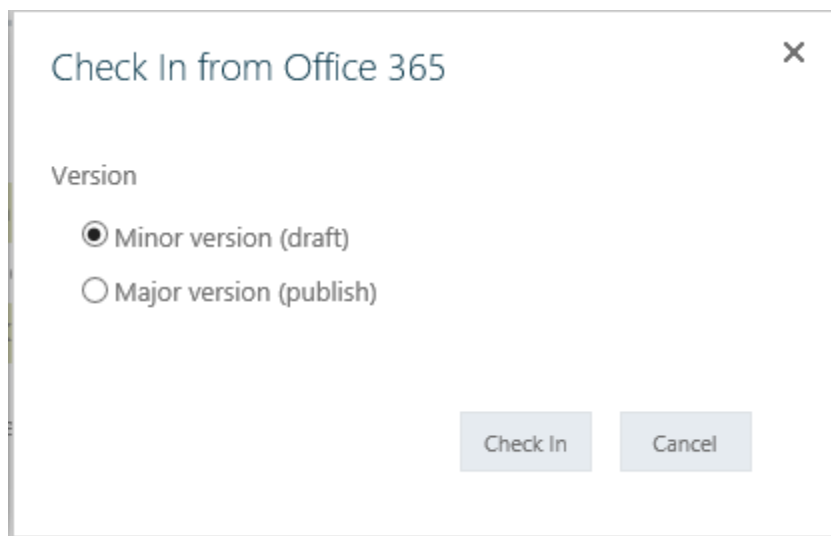
The screenshot shows the Contentworker interface. The top navigation bar includes 'NAVIGATE', 'ADMINISTRATION', 'MATTER', 'FILES', and 'LIBRARY'. The 'FILES' ribbon is active, and the 'Check In from Office 365' button is highlighted with a purple box. Below the ribbon, there are several document cards for different matters, including 'ACTIT AB', 'AJAX NV', 'BAAS CARS', 'BARLEY', 'INSURANCE CORP INC', 'WILE E. COYOTE', and 'ZOOBRACKET'. The 'INSURANCE CORP INC' card is selected, showing a list of documents under the 'Correspondence' tab. The left sidebar shows a tree view of matters, with 'Insurance Corp Inc (100016)' expanded, showing sub-folders like 'Agreement [27]' and 'Correspondence [12]'. The main content area displays a table of documents for 'Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002) Correspondence'.

Name	Document ID	Version	Modified	Modified By	Document I
Letter to John Doe	858	1.1	Tuesday at 3:48 PM	CWAdmin	Tuesday
Loan_Agreement_-_Aug_8	3321	0.2	Tuesday at 3:47 PM	CWAdmin	Tuesday
Letter to Mr X	833	0.23	Tuesday at 3:47 PM	CWAdmin	Tuesday
Arrangement Letter DocsCorp with references (2)	1813	1.0	Tuesday at 3:45 PM	CWAdmin	Tuesday
Demo for JT	1890	0.6	Tuesday at 2:51 PM	CWAdmin	Tuesday

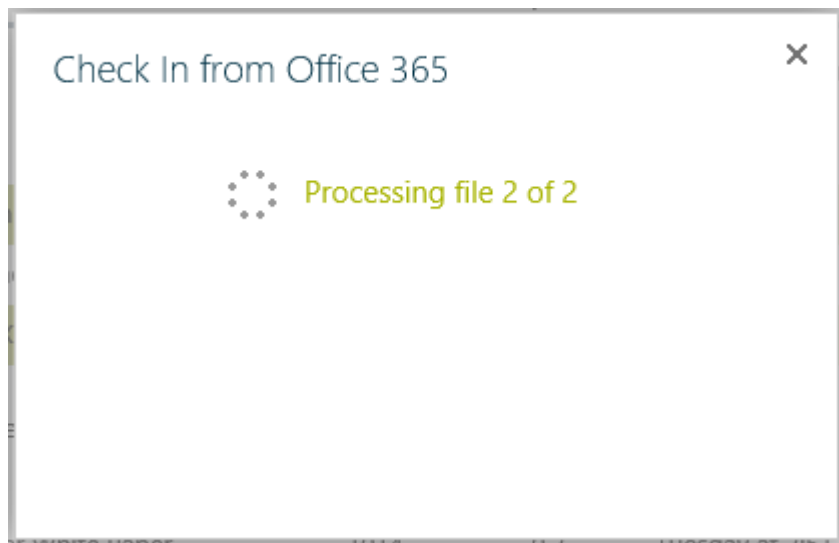
Or use document properties popup Extra ribbon tab.



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.



3. Wait until document(s) are processed.



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

Contentworker by Formpipe Newsfeed

NAVIGATE ADMINISTRATION MATTER FILES LIBRARY

New Document Upload Document New Folder Edit Document View Properties Edit Properties E-mail Attachments E-mail Links Check Out to Office 365 Check In from Office 365 Move to Duplicate Document Copy to Download a Copy Select Document Copy as a link Send T KHR

ACTIT AB EF Test AJAX NV General advice BAAS CARS Client Overview Matt... BARLEY Aquire HAPPY HOPS **INSURANCE CORP INC Merger with Professi...** WILE E. COYOTE Wile E Coyote vs Acn... ZOBRACKET Insolvency

Go to matter...

Saved Searches My Recent Matters My Favourite Matters ACTIT AB (100001) Ajax NV (1025) BAAS Cars (100002) BARLEY (100005) Insurance Corp Inc (100016) Merger with Professional Insurance Agreement [27] **Correspondence [12]**

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

Start Documents Details Calendar Tasks Correspondence Notes Discussions Finance

All Documents Hide Folders Find a file Labels filter:

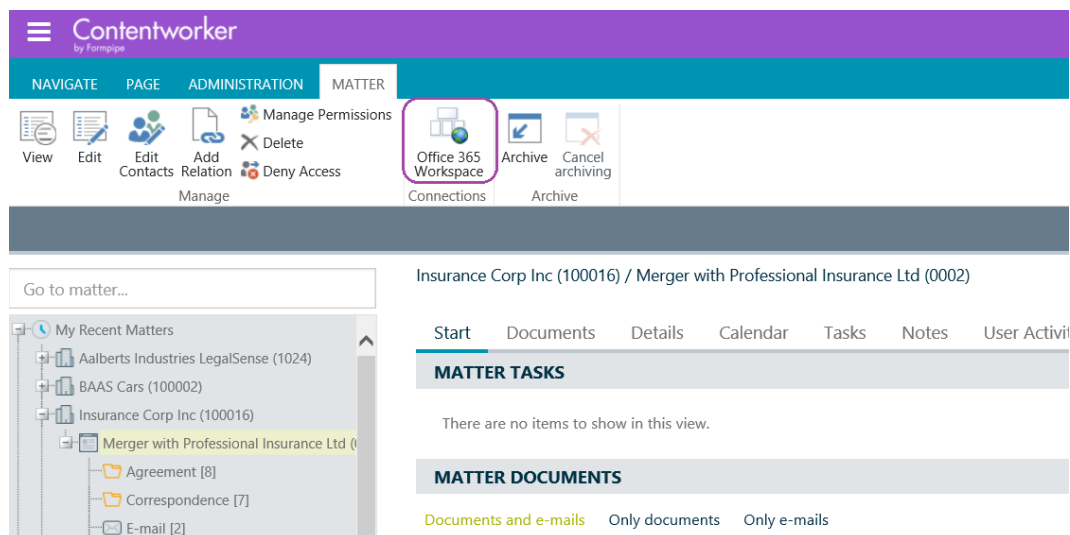
	Name	Document ID	Version	Modified	Modified By	Document I
✓	Letter to Mr X	833	0.24	A few seconds ago	CWAdmin	Today
✓	Letter to John Doe	858	1.2	A few seconds ago	CWAdmin	Today
	Loan_Agreement_-_Aug_8	3321	0.2	Tuesday at 3:47 PM	CWAdmin	Tuesday
	Arrangement Letter DocsCorp with references (2)	1813	1.0	Tuesday at 3:45 PM	CWAdmin	Tuesday
	Demo for JT	1890	0.6	Tuesday at 2:51 PM	CWAdmin	Tuesday

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.

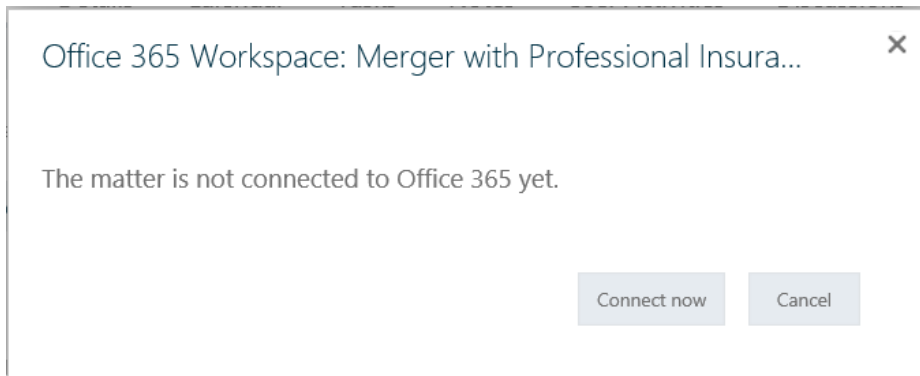
5.1 Access Office 365 Matter Workspace

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



The screenshot shows the Contentworker interface. The top navigation bar includes 'NAVIGATE', 'PAGE', 'ADMINISTRATION', and 'MATTER'. The 'MATTER' tab is active, showing a ribbon with buttons: 'View', 'Edit', 'Edit Contacts', 'Add Relation', 'Manage Permissions', 'Delete', 'Deny Access', 'Office 365 Workspace' (highlighted with a red box), 'Archive', and 'Cancel archiving'. Below the ribbon, the left sidebar shows 'My Recent Matters' with a list of matters including 'Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002)'. The main content area shows the details for this matter, with tabs for 'Start', 'Documents', 'Details', 'Calendar', 'Tasks', 'Notes', and 'User Activity'. The 'MATTER TASKS' section is empty, and the 'MATTER DOCUMENTS' section shows filters for 'Documents and e-mails', 'Only documents', and 'Only e-mails'.

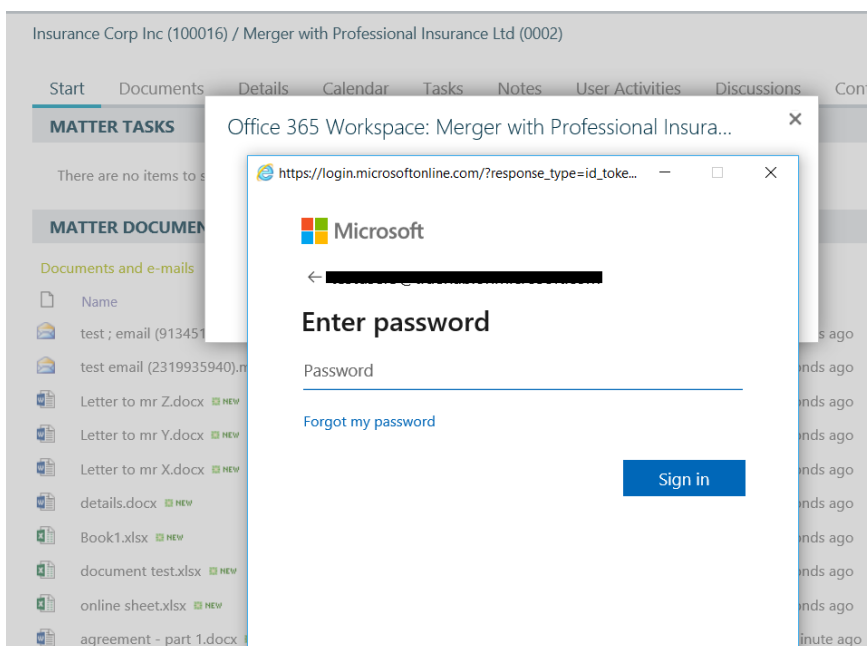
2. You might be asked to connect the matter to Office 365 in case the Workspace has not been created yet; Share to Office 365 or Check Out to Office 365 has not been performed on this matter workspace before. Click “Connect now” to continue to create Office 365 Workspace. This will create the Office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



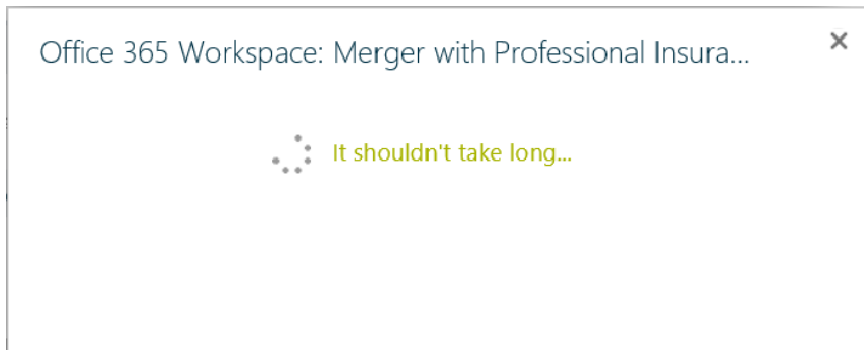
3. Internet Explorer browser might be configured to block pop-ups. If so, please click "Always allow".



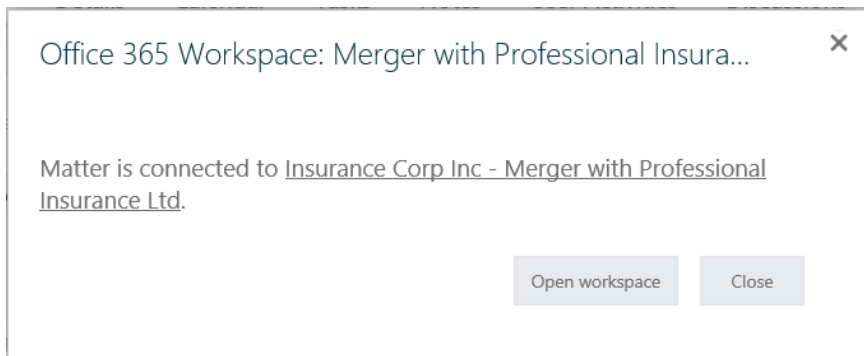
4. You might be asked to enter your corporate Office 365 account credentials when you access Office 365 Workspace for the first time. If you don't know what account to use or don't have one, please contact your IT department.



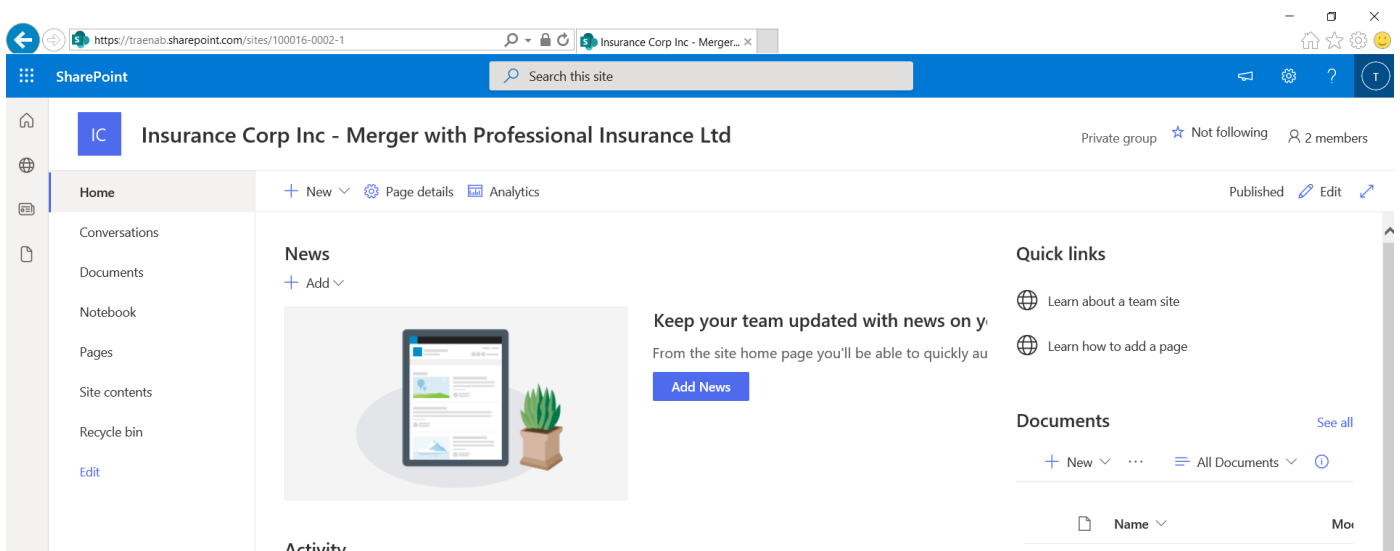
5. Wait until the process is finished.



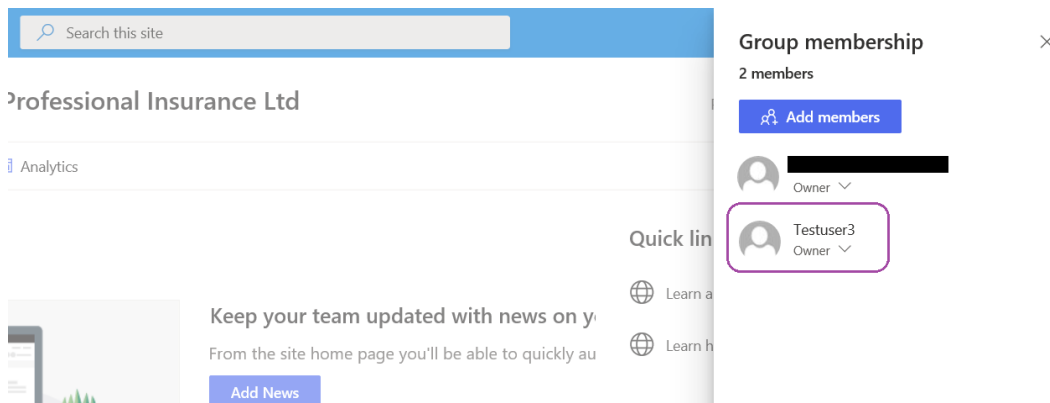
- Office 365 Workspace will be created. Click the "Open workspace" button to navigate to Office 365 Team Site.



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



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.



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.

