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iManage Share Overview

MICRO STRATEGIES

Overview

iManage Share is a separate iManage tool that enables you to securely share files with others. It is integrated with your DMS and is accessed within iManage Work or by going to https://www.imanageshare.com.

iManage Share allows you to:

- Share files with internal and external participants.
- Track file access and edits.

- Send file upload requests to receive files.
- Upload files from iManage Share to iManage Work.

iManage Share Layout
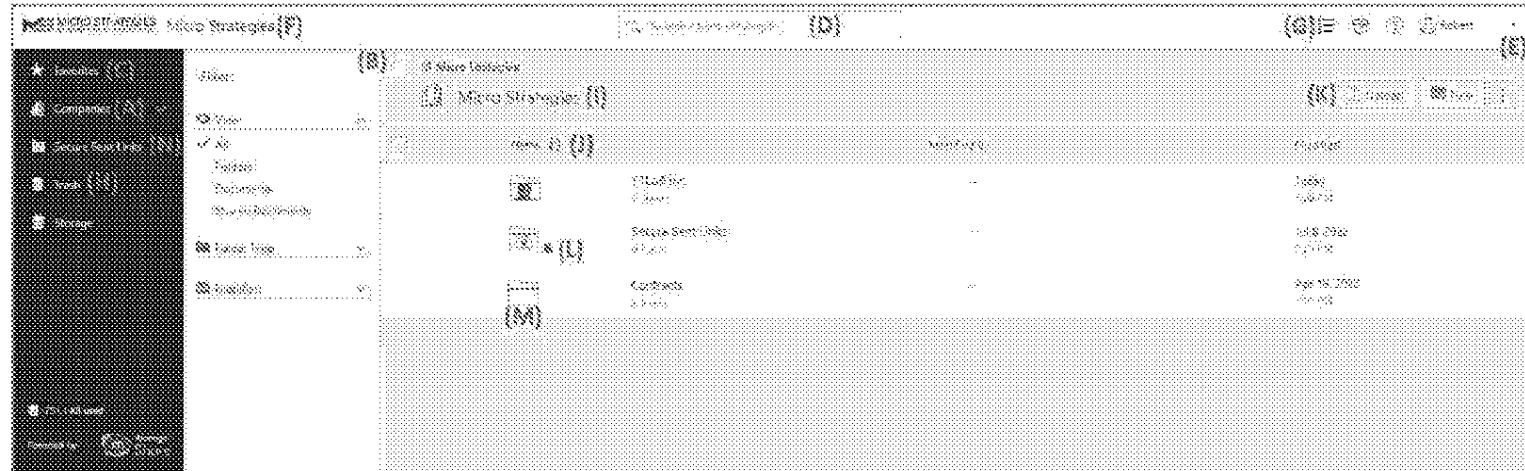
(A) Displays your company along with the other companies from which users have shared any content with you.

(B) A collapsible filter pane with options to sort your folders and documents and show a subset of items.

- There are various filters to help you refine your content search. For example, when on the Company View, use the filter to limit the list to your folders (Private, Shared, or both) to see only your content.

(C) **Favorites** option on the side bar to view your bookmarks.

(D) **Search Bar** allows you to search a company library for folders and documents. Within your company library you can search both your folders (Private) and the folders shared with you by users within your company.

(E) A drop-down menu with options for **Settings** and **Sign Out**.

(F) A header that is customizable with your company logo, name, and palette.

(G) An **Activities** and **Tasks** pane that provides history about the recent activities and any background tasks performed.

(H) Access to your trash.

(I) The current content – either the company root level, a folder name, a document name, or a search list.

(J) The document and folder list that is sortable.

(K) Action buttons for the object in your current context.

(L) Object status indicators for things such as notification subscriptions.

(M) Object icons that indicate a folder or document type.

- Indicates this is a Private folder, visible only to you.
- Indicates this is a Shared folder.
- Indicates this folder is synchronized with your iManage Share Sync.

(N) Shortcut to your **Secure Sent Link** folder.

Folder View in iManage Share
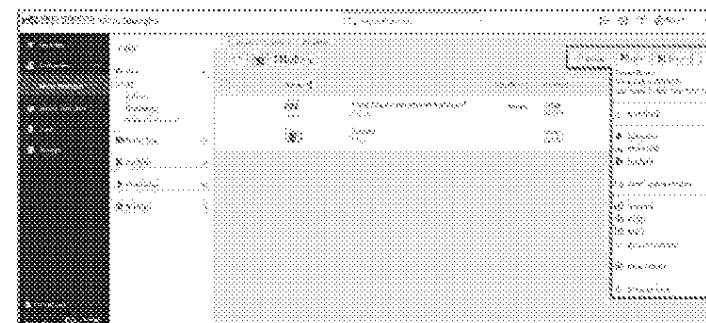
The Folder view options vary according to the access level and sharing rights assigned.

Owner Folder Access

Owners have the highest access privileges to iManage Share folders with the ability to:

- Upload : Upload documents to the folder.

iManage Share Overview

- [New] : Create a new folder (sub-folder).

- [Share] : Share the folder and contents with others.

- [:] : **More** button to view the following options:

  - [Download] : Download the folder as a .zip file.

  - [Subscribe] : Turn on notifications for folder activities.

  - [Unsubscribe] : Turn off notifications for folder activities.

  - [Share Link] : Obtain a shareable link to the folder and contents.

  - [Send Upload Request] : Create an upload request for the folder.

  - [Rename] : Rename the folder.

  - [Copy] : Copy the folder.

  - [Move] : Move the folder from its current location.

  - [Add to Favorites] : Mark this folder as a favorite.

  - [View Activity] : View folder activity.

  - [Move to Trash] : Delete content from iManage Share, moving it to the Owner's **Trash** folder.

Co-Owner, Collaborator, and Guest Folder Access

Co-Owners have similar access privileges of an Owner except the **Rename** and **Move** options. If the Co-Owner trashes a file only the Owner can restore it.

Collaborators have similar access privileges of a Co-Owner except the **View Activity** and **Move to Trash** options.

Guests can **Share**, **Download**, **Subscribe/Unsubscribe**, **Share Link**, **Copy**, and **Add to Favorites**.

Note: Guests can only **Share** if the option for **Allow others to re-share this folder** is selected.

Document View in iManage Share
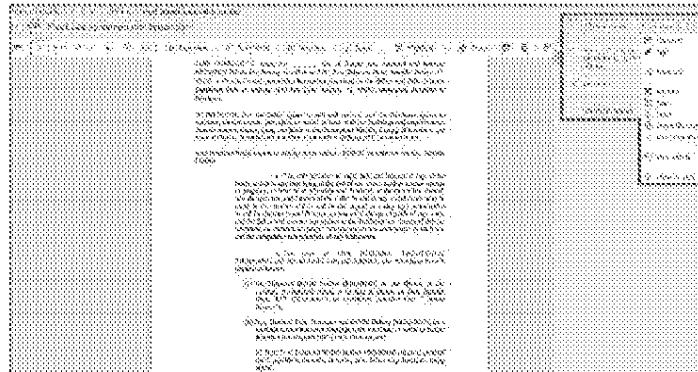
The Document view allows you to perform various actions based on the level of access you have to the document.

Documents You Own

- [ ] : Flag the document as being in use.

- [New Version] : Add or update a document version.

- [Download] : Download the document.

- [:] : **More** button to view the following options:

  - [Comment] : Add a comment for the document.

  - If there is a comment on the document, you can select the [EDIT] option to update or delete the comment.

  - [Tags] : Add or delete document tags.

  - [Share Link] : Obtain a shareable link to the document.

  - [Rename] : Rename the document.

  - [Copy] : Copy the document.

  - [Move] : Move the document from its current location.

  - [Create Shortcut] : Create a document shortcut.

  - [Add to Favorites] : Mark this document as a favorite.

  - [View Activity] : View the document activity.

  - [Move to Trash] : Delete the document from iManage Share, moving it to the Owner's **Trash** folder.

- [VIEW INDEX DETAILS] : View the document index details.

- [ ] : Indicates the folder where the document is located. Clicking the hyperlink next to this icon takes you to the originating folder.

Documents Shared with You

You are either a Co-Owner, Collaborator, or Guest for documents shared with you.

- Co-Owners can use all the options available under **Documents You Own**.

- Collaborators can use all the options available for a Co-Owner, except the **Move** and **Move to Trash** options.

- Guests can only use the **Copy**, **Create Shortcut**, **Add to Favorites**, and **Share Link**.

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