



Quick Start Guide

WELCOME

Thank you for taking the time to evaluate Autotask Workplace. This guide will help you quickly see how Workplace can benefit your business, especially for collaboration and working on mobile devices.

BEFORE YOU GET STARTED

There are three primary ways to access Workplace:

Workplace Online – Using a standard web browser, simply login at us.awp.autotask.net using the credentials you've been given.

Workplace Desktop – The Desktop Agent works within your native file manager (Mac Finder or Windows Explorer) as a convenient way to quickly access common actions around files and folders without having to use the browser. To use Workplace Desktop, set up your credentials via your Welcome Email for your Team and you will be directed to Workplace Online to the Devices tab where you can install Workplace Desktop for Windows and Mac devices.

Workplace Mobile – The Workplace mobile application is available for download for iOS in the Apple App Store and Android in the Google Play Store.

As always, if you have questions or would prefer a live demonstration of any features,

TOPICS

Here is a list of topics we've laid out for you:

- Sharing and Collaboration – basic sharing and document editing in Workplace
- Going Mobile – working on documents while on-the-go
- External Sharing – Using secure public links and other sharing techniques



SHARING AND COLLABORATION

Now that you are set up, we'd like to show you how easy it is to share projects and files with Team Members via a browser or Workplace Desktop.

Steps

Multiple Ways to Access Files

1. Online/Browser View: Log in to Workplace Online
 - a. Go to us.awp.autotask.net (Workplace Online) and log in.
 - b. You will be presented with your Dashboard.
 - c. Click Projects from the navigation bar
 - i. You will see a Personal Documents Project. This is created by default and accessible only by you.
2. Workplace Desktop View
 - a. On your desktop or within your file manager, look for the Autotask Workplace folder and open it.
 - b. You will see the same Projects and files as you see in the browser.

Create and Invite a Team Member

1. Log in to us.awp.autotask.net
2. Navigate to Team > Members > Add a Member. Go ahead and add another person from your company, and be sure to use a valid email.
3. Now you can add this new Member to Projects you own.

Sharing a Project

1. Using Workplace Online (browser), return to the Projects tab and choose the Project you would like to share.
2. Click "Shares" and type in the name of the Member you added (or an existing one if available), select the level of sharing and editing you wish to grant and click Share Project. This will share the contents of the Project with that Member and those files will be accessible on all devices they have access to.
3. When that Member logs in to Workplace Online (us.awp.autotask.net), they will be able to see the files you just shared. They will also be able to see the same file and folder on their mobile device.



SHARING AND COLLABORATION CONT'D

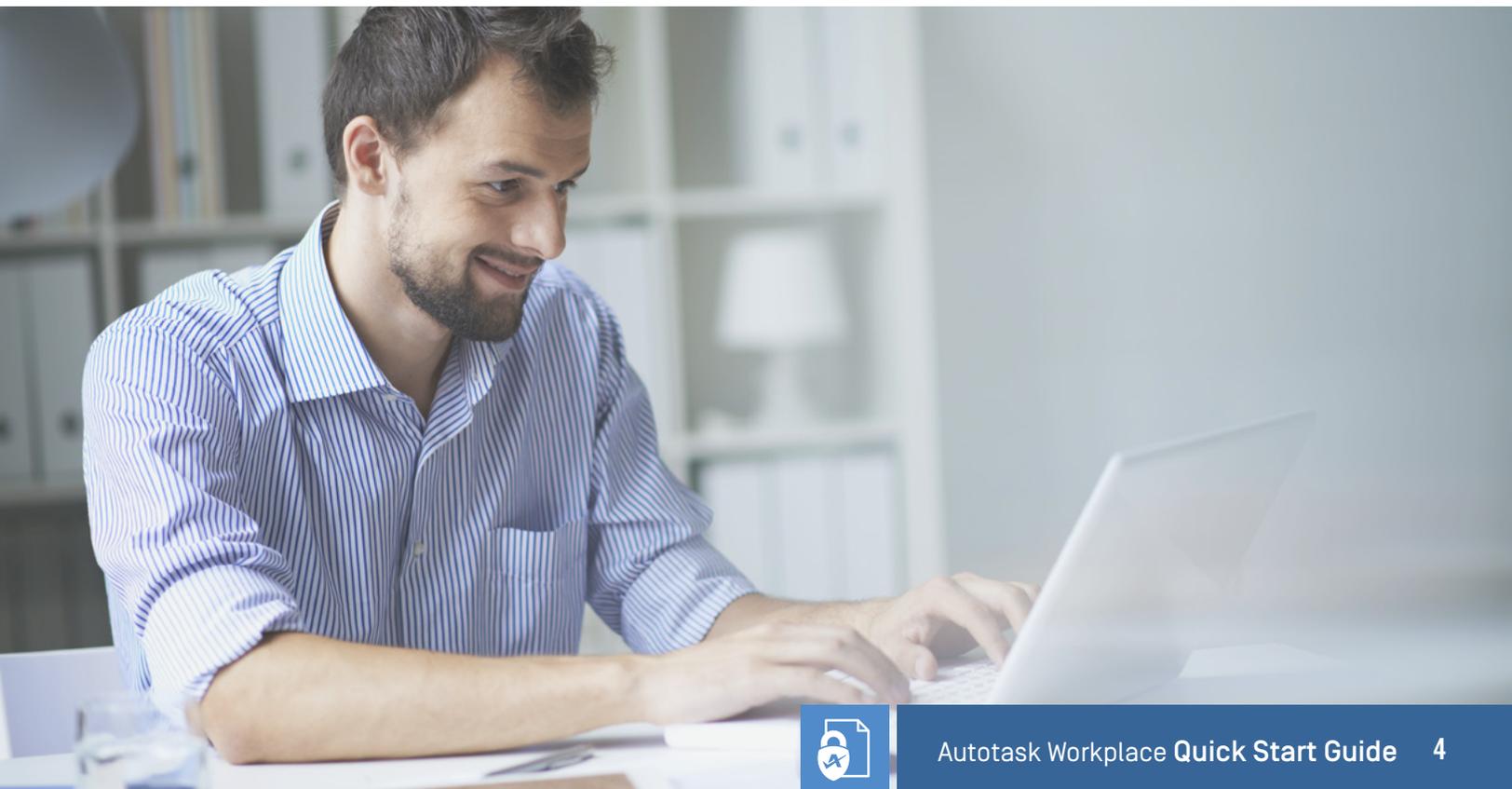
Editing a File

1. Using Using Workplace Online, navigate to a Project or folder that contains files.
2. If multiple people have access to that file, you'll want to "Lock" the file before making changes. Click on the lock icon in the Browser view, or right click the file in the Agent view to access the menu.
3. Now you can edit and save the file without fear of being accidentally over-written.
4. If there are other Team Members who have access to the file, they will receive your changes.

Note: If someone makes a change to the same file while you have it locked, they will not overwrite your file. Instead, a conflict file will be created for them so that their changes are not lost.

Recovering Versions

1. You can recover prior versions of a file by navigating to that file in the Browser, and click on the link right below Details, that indicates "Previous Versions" if there are any.



GOING MOBILE

Steps

1. Install the Workplace app [if you haven't done so already]
 - a. On iOS, install Workplace from the App Store
 - b. On Android, install Workplace from the GooglePlay Store
2. Edit a document on your mobile device
 - a. Log in to the app, which will put you into the default Dashboard view.
 - b. Go to the Projects tab.
 - c. You will see your Personal Documents folder and any other Projects you have created.
 - d. On your device, find and open one of the files.
 - e. Tap the Edit (pencil) icon to open the document for editing. You will be asked to lock the file, which has the same effect as locking the file in the Online or Desktop view.
 - f. Make some changes and click Close – which will ask you to save it.

Note: The Workplace mobile apps include integrated Microsoft Office editing tools. You can also use “Open In” to invoke other editing tools on your device.

3. Take a photo and annotate it on the mobile device
 - a. Tap the Plus button, and select Use Camera to take a photo.
 - b. Take a picture, tap Use Photo, save it.
 - c. Tap the photo name from the navigation list to load it. Tap the Scribble icon at the top of the screen. This will open the photo and allow you to annotate directly on the photo.
 - d. Use the tools on the left side to draw arrows or write notes on the photo.
 - e. Tap the X to select Save. It will be saved as a PDF and automatically appear in the folder and sync to other devices and Team Members.

Note: The annotation tool can also be used to sign documents such as contracts. Simply open an existing document and click the Scribble icon to sign the document.

4. Working Offline/Airplane Mode – The Workplace application includes smart sync capacities that let you take entire Projects and folders for offline access. The Android



GOING MOBILE CONT'D

To Sync a Folder

1. Go to the Projects view on your device and click on the circle 'i' icon next to a Project or folder.
2. Tap "Sync to Device" to sync that folder for offline access. Wait for the green checkmark to appear before going offline.
3. Now go into Airplane mode on your device.
4. The synced content will be accessible even when there is no connection.
5. You can edit or mark up the file while offline now.
6. Save the file.
7. Go back online on your device, and it will start synchronizing automatically.

Note: Workplace includes integrated data loss prevention and device security functionality to deal

EXTERNAL SHARING

As you've discovered, sharing with Team Members is simple and secure. However, sometimes you may want to share a file with an external third-party who may not be a permanent part of your Team. For that, Autotask Workplace offers a simple, secure way to share folders and files with Public Links. We'll show you how it's done using Workplace Online (browser), but this can also be done in Workplace Desktop and in the mobile apps.

Steps

1. From Workplace Online (browser)
 - a. Go to the folder or file you want to share and click Public Link, then check Allow Public Access, to bring up a number of secure sharing options such as Download, Password and Expiration.
 - b. Then to securely share the link to the folder or file, click on the Public Link URL which will automatically copy to your clipboard so that you can paste it into an email.
 - c. Alternatively, you can click the Send Link next to the URL to send directly through the browser.

Note: You can also share externally from Workplace Desktop or the Workplace mobile app: from Workplace Desktop – right click the file to bring up the Public Link option; from the mobile app – click the circle 'i' icon to bring up the Public Link option



ADMINISTRATION & SECURITY

Now that you've seen how easy it is to use Workplace to securely share and collaborate on documents, as well as going mobile, here are some additional administration features you can explore.

Device Management:

While logged into Workplace Online as an Admin, click on the Devices tab to see and manage a list of all devices, sync status, and controls such as disabling devices.

Policy Profiles:

While logged into Workplace Online as an Admin, click on the Configuration > Policies tab to view the numerous policy and security options available – including password, session, approvals, device wipe, mobile policies, editing, etc.

Reporting and Auditing:

While logged into Workplace Online as an Admin, click on the Reports tab to see an activity trail based on users, devices, content. These reports can be configured, saved, and scheduled on a daily, weekly or

Remote Wipe:

This setting is configured on the server by logging into Workplace Online and navigating to Configuration > Policies and using the options under the Device and Policies section. Once the policies are set, triggers such as account disablement or account deletion will initiate the wipe function on the device.

Note: The security, data loss prevention and mobile security policies mentioned above are all available as an integrated part of the Workplace service. It does not require the purchase or integration of additional third-party software. This is a major advantage for BYOD and employee-owned devices.



NEXT STEPS

Thank you for taking the time to evaluate Workplace. We've only touched on some of the most common features that customers find useful. You'll find that the more you use Workplace, the more you'll see how it will help you and your business become more effective and productive.

If you'd like to have a personalized demonstration of the additional features, or if you have additional questions, please let us know. We're happy to assist you.

