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**Compelling Reasons  
and  
steps to upgrade iManage Servers**

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# 1. About MacroAgility Systems, Inc.

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## 1.1 About Us

### **“Excellence in Consulting, Innovation and Integration”**

MacroAgility is a service-oriented consultant firm that delivers high standard professional services for Enterprises in both private & public sectors in Northern America/Canada and Asian Pacific. MacroAgility's mission is to provide enterprise solutions with the most reliable professional services and become a trustworthy party for its Enterprise clients. MacroAgility has maintained a 100% project success rate since we started the business.

With extensive technical expertise and years of experience with iManage Content Management, Our team can provide you friendly service with fast delivery from experienced consultants including upgrade, Matter-Centricity, customizations and custom development for one of the leading DMS iManage Work formerly known as WorkSite. We do this by meeting with different departments of Business and IT to gather the requirements and tailor a design/solution that utilizes the WorkSite to its fullest. Using the strong team skills and experience, we work as a bridge between iManage support and your IT department to provide a productive iManage solution during your firm's business hours.

Principally our solutions and services have been focused around the iManage products and deliver projects throughout North America. MacroAgility has evolved to expand its product portfolio to include a number of technologies to enhance their client's efficiency. This has included both partner products and also MacroAgility developed software.

During 2014, MacroAgility began to see higher client demand its solutions to be Managed Served or hosted and delivered through external platforms. MacroAgility invested in Managed Services and Infrastructure enabling us to provide our clients with a comprehensive portfolio of products and services to satisfy their information technology needs and to address specific, infrastructure related challenges and requirements. This recent addition to the already extensive portfolio of products and services MacroAgility offers ensures that we are able to provide not only the applications and expertise required to address the strategic objectives of our clients businesses but the infrastructure and platforms that they are dependent upon.

MacroAgility has acquired a vast amount of experience deploying and supporting many different types of knowledge and iManage solutions and other business specific applications for professional services firms. In particular, we have gained business in providing our services within the Legal, Property, Accountancy, Financial and Private Equity market sectors. This has enabled us to use that accumulated knowledge to engage and add value to

businesses within these sectors; to streamline and optimize implementations and to add functionality to reduce support, administration and total cost of ownership.

We are well known for our technical expertise and professional service excellence in the iManage community. One of the most reliable iManage Partner that is engaged with service contracts from Autonomy Professional Services worldwide. All of this is delivered with a passion for customer service to ensure our clients gain the best possible experience.

## 1.2 Our Services

### Our Services Include:

- iManage Upgrade
- iManage implementation
- iManage Matter-Centricity
- iManage integration with other systems
- iManage Custom Development
- iManage Managed services
- Our consultant can provide service either onsite of offsite
- CRM and Content Management Solutions
- Search Engine Optimization

### 1.3 Some of our Clients

	<p>McMillan LLP  <a href="http://www.mcmillan.ca/index.aspx">http://www.mcmillan.ca/index.aspx</a></p>	<p>MacroAgility helped them upgrade communication server and the Idol services.</p>
	<p>RSD Information Governed  <a href="http://www.rsd.com/en">http://www.rsd.com/en</a></p>	<p>MacroAgility helped them build the iManage integration with their product.</p>
	<p>Orlando Corporation  <a href="http://www.orlandocorp.com/ORL_html/index.php">http://www.orlandocorp.com/ORL_html/index.php</a></p>	<p>MacroAgility built a tool to export documents from worksite to local systems</p>
	<p>Mobile Helix  <a href="http://mobilehelix.com/">http://mobilehelix.com/</a></p>	<p>MacroAgility built the iManage integration with mobilehelix's cloud base product</p>
	<p>Char Sakamoto Ishii Lum &amp; Ching  <a href="http://www.lawcsilc.com/">http://www.lawcsilc.com/</a></p>	<p>Upgrade from 8.2 to the latest version of iManage Work</p>

## 2. COMPELLING REASONS TO UPGRADE TO IMANAGE WORK 10

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### 2.1 COMMUNICATION SERVER IMPROVEMENT

#### 2.1.1 Communication Server 9.4

iManage Work Communication Server for Exchange (WCSE) 9.4 continues to leverage the Work Communication Server service and Exchange Web Services APIs for server-side filing and email folder synchronization. New in WCSE 10: Mailbox synchronization has been redesigned so that it no longer searches user mailboxes to locate items to be marked. Some of the key features as of WCSE 9.3.1, including new iManage rebranding, custom settings preserved on upgrade, enhanced logging, and enhanced subsystem polling options. For more information on how to configure and use WCSE, call MacroAgility.

#### 2.1.2 COMMUNICATION SERVER 9.4 ESSENTIALS

Work Communication Server for Exchange (aka iManage Communication Server for Exchange) functions as a bridge between your Microsoft Exchange infrastructure and iManage Work. It includes two main components:

- Work Communication Server - Operates on top of Microsoft SMTP and files incoming email messages and their attachments sent to an iManage folder via SMTP only.
- Exchange Web Services (EWS) - Provides functionality to enable the Communication Server to communicate with the Exchange Server and uses SOAP to provide the messaging framework for messages sent between WCSE and the Exchange server.

#### 2.1.3 Exchange Web Services:

Work Communication Server for Exchange (version 9.1 and later) includes the Work Communication Server (WCS) service and Exchange Web Services APIs. The Exchange Web Services component facilitates filing emails to the iManage Work Server and also enables email folder synchronization with iManage Work Server. For more information, call MacroAgility.

#### 2.1.4 Server-Side Email Filing:

In earlier versions of iManage Work, emails filed to iManage Work were processed by each client. When multiple emails were filed simultaneously, a FileSite user was forced to wait until

all of the emails were filed before they could continue their work. Now, emails filed to iManage Work are put into a queue and filed in the background by the Work Communication Server for Exchange.

This feature becomes available for use only after a registry key has been enabled in the iManage Work Server. This key should be enabled only after you have completed installation and configuration of both components of the Work Communication Server for Exchange.

A column in the FileSite display shows the status of the filing process for each email, either 'Queued,' 'Tiled,' or if a problem occurs, 'Failed' The iManage Work location for the filed email is also shown in the FileSite display.

### **2.1.5 Enhanced Mailbox Sync:**

As of WCSE 9.4, Mailbox synchronization has been redesigned so that it no longer searches user mailboxes to locate items to be marked. As part of the new architecture, WCSE captures item properties and recipient information when new items are filed Mailbox synchronization subsequently targets those specific items and updates them with filing information, removing the need to search across user mailboxes.

This new architecture should reduce the load on Exchange.

- When mailbox sync encounters a Distribution list in the To or CC field, it expands only the top level.
- Nested distribution lists are not expanded to create mailbox sync request&
- Mailbox sync does not sync previously filed emails.

The registry keys Sync Last X Days, MailboxSync Thread Pool Size, and Poll MailboxSync Process Interval are now obsolete.

### **2.1.6 Custom Settings Preserved on Upgrade:**

WCSE 9.3 added a beta version of an enhancement to the upgrade process that automatically backs up your current registry settings from the Mgr LOCAL MACHINE\Software\Interwoven key, saves the registry settings and a log of the backup to the TEMP directory, and restores the settings after the product upgrade complete & This enhancement saves you from having to back up and reapply your custom registry configuration during a WCSE upgrade.



### **2.1.7 Enhanced Logging:**

WCSE logging has been streamlined as of version 93. There are four (4) levels of logging: Error, Warning, Info, Debug. You should run WCSE in Info logging mode except when investigating an issue.

### **2.1.8 Increased Number of Logs:**

As of the version 93 release, the verbose logs have been increased to 20 log files. The three non-verbose logs have been increased to 10 log files. WCSE checks the log every hour to determine if a new log should be created. If the log is larger than 20 MB in verbose mode, WCSE creates a new log file. If the log is larger than 10 MB in any of the three non-verbose modes, WCSE creates a new log file.

### **2.1.9 Enhanced Subsystem Polling Options:**

As of the version 93 release, WCSE enables you to configure the polling interval for the FolderProcessor subsystem separately from other subsystems. This feature significantly improves performance for both EWS and the iManage Work Server. The FolderProcessor checks linked folders for new content to file. By default, it continually scans all enabled linked folders. This generates an EWS request each time to find new content, and a Work Server transaction to update the folder link record in the database. This can result in performance issues for both Exchange and iManage Work. Prior versions of WCSE had one polling interval setting that impacted all subsystems, including EmailFiler. Reducing the frequency of FolderProcessor polling would also reduce the frequency of EmailProcessor polling, resulting in longer filing times for all filed emails.

### **2.1.10 Notification of New Content in Folders:**

While increasing the polling interval for FolderProcessor improves the performance of both EWS and iManage Work, it also results in longer filing times for linked folders, as the FolderProcessor checks for new content less frequently. To address this, iManage recommends enabling the NotifyDirtyFolder feature on the EM clients used for filing. With this feature enabled, the client notifies the WCSE server when new content is added to a linked folder, reducing the need to rely on the FolderProcessor polling. When the WCSE server receives a notification that new content has been added, FolderProcessor uses the next available thread to scan that linked folder for new content.

## **Lab 6.4: Suggested Filing Location Enhancements**

With iManage Work version 93 and later, the Suggested Filing Location feature includes a redesigned algorithm to increase the accuracy and efficiency of filing. The Suggested Filing Locations are constructed based on user activity within a single workstation over time. A local cache of filing information is built to provide the user with fast responses.

When a user selects an email to file, Suggested Filing considers these factors as part of the algorithm:

**Luggage Tag:** A Luggage Tag is information in square brackets automatically appended to the Subject Line of an email filed via Send and File, e.g. [databasename\_FID123] that indicates where the item was filed. If a Luggage Tag is present on an email, only one Suggested Filing Location will be displayed. When the user's local cache does not contain an entry for the Luggage Tag in an email, the system will attempt to resolve the location in the iManage Work Server to add an entry to the local cache.

**Conversation History:** If there is no Luggage Tag then the system infers recent locations based on conversation history. When the user is filing an email that is part of a conversation thread that the user had previously filed, then the Suggested Filing Locations will show the most recent locations for the conversation thread.

**Conversation Participants:** When the previous two options fail to produce Suggested Filing Locations, conversation participants (excluding participants in the BCC field) are then evaluated.

### 2.1.1 Preventing Data Leakage:

iManage Work 10 Web Client can be configured to enforce a Data Leakage Policy (DLP). Two options are available:

1. Low (default). All functionality is available to end users
2. High: The following functionality is not available to end users:
  - A. Users cannot download documents
  - B. Users cannot download email attachments
  - C. In the "Share document by email" dialog, the option to attach a document to the email is disabled if a user forwards an email

**Restricting user access:** You can restrict user access to iManage Work 10 Web Client based on group membership. This must be configured by an administrator. The default is to allow access to all valid users.

### **2.1.2 Send and File a response to a filed email:**

When forwarding/replying to an email saved to a Workspace folder using iManage Work 10 or later, a user can send a copy of the email to the same Workspace folder - if that folder has a valid Work Communication Server (WCS) email address assigned to it. A registry key lets you choose to file the email by adding the folders email address to the BCC field or the CC Field. When you use iManage Work 10 Web Client to send an email, by default iManage Work 10 also sends a copy to the Sender by adding their email address to the CC field of the email. This must be configured by an administrator.

### **2.1.3 Email address suggestions:**

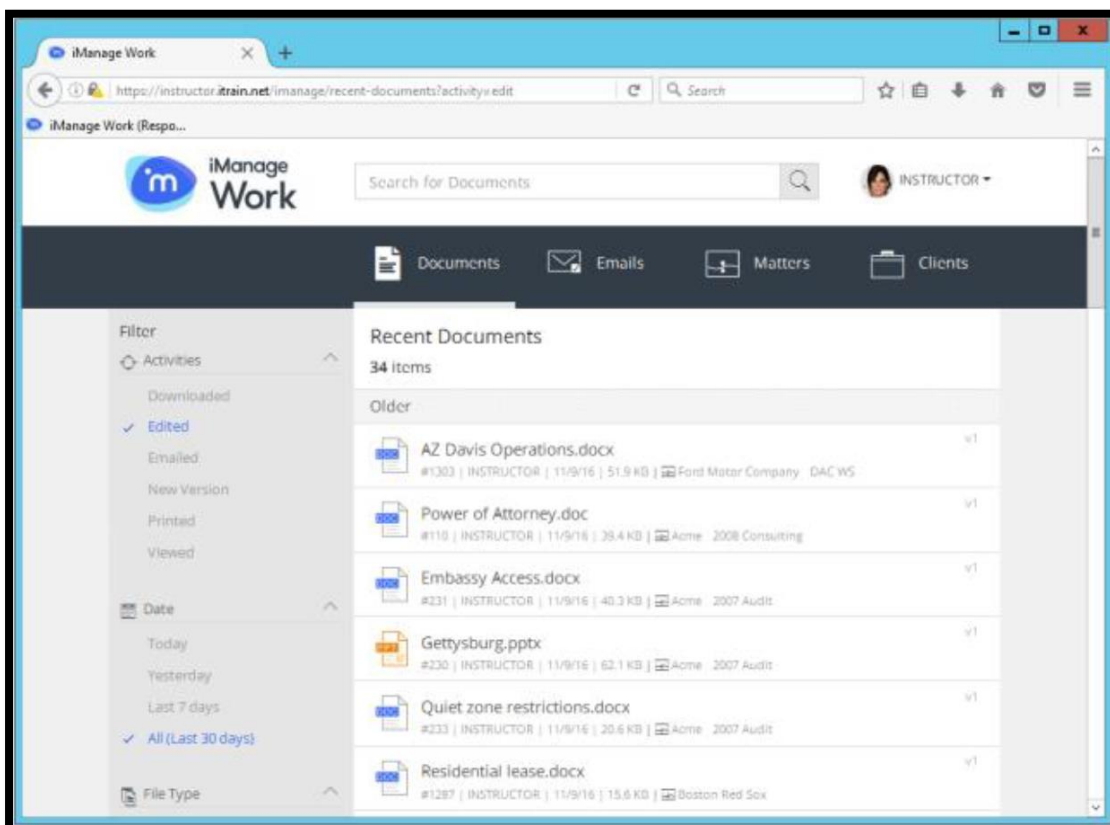
When a user sends a document or replies to a filed email, iManage Work 10 and later suggests email addresses as the user begins to type in the To or CC fields. These are based on the addresses found in emails filed to the workspace from which the email is sent.

### **2.1.4 Other Communication server improvements**

- 10.x have a true load balancing. The biggest issue with 8.5 load balancing is that it distributes firm users evenly to the WCS cluster base servers. What this means is that, if the firm had 900 users and 3 WCS servers in the cluster, it would distribute 300 users to each server in the cluster. This implies that, if Mary were assigned to Server1 and it went down, she would be unable to file emails, even though Server2 and Server3 were up. This defect has been resolved in the WCS 9.x. Now, if a server is removed from a WCS cluster, it will process new filing jobs gracefully.
- Scripting: WSC 10.x supports scripting which can be used to change e-mail profile, security, as well as, raw EML file before importing to Worksite. This is very advantageous, if different departments desired to use their own email profile information, such as, type and class.
- With WCS 10.x, only one service is used to process 'Send and File', 'File Email' and 'Synchronize Mapped Folders'.
- WCS 10.x offers support for Microsoft Exchange Online and Windows Server 2012 R2
- Folder profile will take precedence over default email profile.
- WCS 8.5 and WorkSite Server 8.5 can cause the WorkSite services to malfunction: For instance, if 'Verbose Logging' were turned on in the WorkSite 8.5 server, Communication Server 8.5 increases the traffic between WorkSite server and the database. As a result, WCS 8.5 writes numerous log entries in the SQL server, creating tremendously huge logs and causing the worksite service to slow down and eventually stop working. Consequently, users will first experience slowness in opening and closing documents from Filesite and eventually get errors. This issue has been resolved in WorkSite Server 9.x.

- WCSE now supports environments running different versions of Exchange concurrently. Exchange versions 2007, 2010, and 2013 are supported in mixed-mode
- Allows separate processing and filing of e-mails and mailbox synchronization
- WCSE now includes the subfolders contained in the User's Inbox when it performs a mailbox synchronization
- The new WCS Administration (Admin) utility provides administrators with the following features:
  - View and filter a list of failed filing requests
  - Re-submit or delete failed filing requests singly or in batches
  - View linked folder statuses

## 2.2 iManage New Professional Client Overview



### 2.2.1 New Professional Client

iManage Work 10 features a responsive Web interface so users have a consistent experience across different devices, which also ensures users only have to learn it once. Providing users a zero footprint, responsive Web interface - accessible by desktop and mobile browsers -

allows them to work from anywhere, do just about any device without always requiring a dedicated desktop client or mobile app.

### **2.2.2 Contextual Help**

iManage Work 10 offers simple Help tips that appear within the relevant view to highlight key new features. A blue dot icon next to the Help icon denotes new tips.

### **2.2.3 Recent Documents:**

The Documents tab allows you to see all the documents you have interacted with in the last 30 days. By default, the list is limited to documents you have created or edited. However, the Activities Filter enables you to also display documents that you have downloaded, emailed, created a new version of, printed or viewed. The filter is "sticky," so options selected are retained until you unselect them.

### **2.2.4 Blue dot flags edited documents:**

In the Recent Documents list, a blue dot appears against a document to denote that the latest version of the document was edited by another user since it was last viewed. After you view the latest version, the dot goes away.

### **2.2.5 Recently Filed Emails:**

The Emails tab contains any email filed to the iManage Work 10 Server where you were the Sender or were included in the To/CC or BCC fields in the last 30 days. This includes emails that other users have filed to the Work Server, security permitting. You can toggle between From Me/To Me to easily switch between emails you have sent or received.

### **2.2.6 Recent Matters/My Matters:**

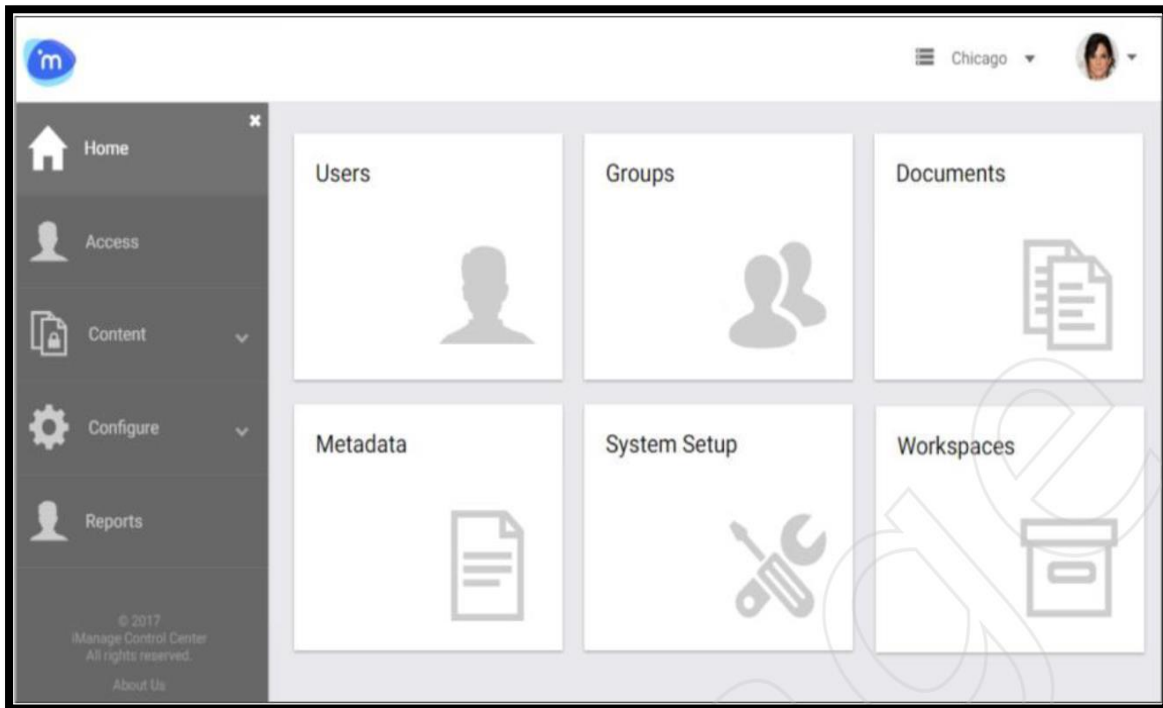
Recent Matters contain any document or email you have worked on in the last 30 days, specific to a Workspace. From within the Recent Workspaces tab, you can select My Matters to see your Workspace shortcuts - the same as in DeskSite or FileSite. After opening a Workspace from either of these lists, use the Latest Documents or Latest Emails filters to see the 100 most recent documents or filed emails in a single list within the Workspace.

### **2.2.7 Recent Clients:**

The Clients tab displays a list of clients that contain any document or email that you have worked on in the last 30 days, specific to a client. Click on a client to list all Workspaces

belonging to that client to which you have access. Use the Latest Documents/Latest Emails filter to see the 100 most recent documents/filed emails in a single list for the selected client.

## 2.3 iManage CONTROL CENTER



### 2.3.1 iManage Control Center 10

iManage Control Center (iCC) provides a browser-based interface for the management and administration of the iManage Work system. This browser-based interface communicates with the iManage Work environment, allowing it to work over HTTPS connections for greater functionality and support of iManage Cloud customers. This application gets installed along with the iManage Work Server.

### 2.3.2 iManage Control Center for Administration:

iManage Control Center (iCC) highlights administrative features that were historically available in the legacy iManage administration tools, such as Database Administration (DBAdmin) and Monitor.

iCC provides a responsive UI and enables administrators to manage their implementation in the iManage Cloud or on-premises from any device. It enables you to administer users,

groups, and roles; configure custom metadata values; and set up system settings for document types, classes, applications, and captions. In addition, it allows pertinent administrative actions for documents, such as checking-in, unlocking or evaluating user's access of documents. The interface is designed to make it much easier to perform these tasks with the ability to perform functions such as multiple entities and search/filter to find the specific entity (or entities) for a task that needs action.

iCC also empowers engagement managers with greater control over Workspaces by way of defining folder templates that allow you to quickly and easily structure your engagements. iCC equips Work administrators with a predefined set of reports that allow you to address common report requests.

There is no product key for iManage Control Center. The Work Server by default installs iCC.

NOTE: iCC requires a member of the NRTAdmin group within the iManage Work Server for the initial configuration. Users are assigned the Tier 1 or Tier 2 to have access to iCC.

### 2.3.3 Control Center Access (Tiered)

Roles determine the 'Tier' of access for a user

- Allows administrators to distribute access to document management functions selectively across an organization

- Roles are categorized into Tiers based on privileges (aka, rights)

— When users log in to iManage Control Center they see only those applications on the Home page, for which they have the necessary privileges

TIER	AVAILABLE APPS
Tier 0	None
Tier 1	<ul style="list-style-type: none"> <li>• Users</li> <li>• Documents</li> <li>• Workspaces</li> </ul>
Tier 2	<ul style="list-style-type: none"> <li>• Tier 1 Apps</li> <li>• User Reports</li> <li>• Metadata</li> <li>• System Setup</li> </ul>
NRTAdmin	<ul style="list-style-type: none"> <li>• Tier 1</li> <li>• Tier 2</li> <li>• Roles</li> <li>• Groups</li> </ul>

## 2.4 CLASSIC CLIENT AN INTEGRATION ENHASMENTS

### 2.4.1 Language Localization

The iManage Work 9.3.1 and later Desktop Clients support non-English Localization in:

- German
- French
- Brazilian Portuguese
- Spanish

### 2.4.2 iManage 9.3 Supports Office 2016, Visio 2016, and Windows 10:

The 9.3 Desktop Clients (x86 and x64) now support the GA releases of Office 2016, Visio 2016, and Windows 10.

### 2.4.3 Support for Adobe Document Cloud (DC):

The 9.3 Desktop Clients integrate automatically with Adobe Document Cloud.

### 2.4.4 AD FS Support:

The 9.3 Desktop Clients support Active Directory Federation Services (AD FS). This feature requires the 9.3 iManage Work Server. This feature will be covered in detail in a later module.

### 2.4.5 New iManage Work Client General Look and Feel

Starting with the 9.3 release, iManage introduced a new user interface to improve users' day-to-day experience when working with the Desktop Clients. The improvements listed in this section apply to FileSite, DeskSite, and OffSite (both x86 and x64 builds).

Improvements include:

- Refresh of all icons in Desktop Clients
- Support for High DPI
- iManage re-branding
- Right-click menus now show icons
- Express Search now available in FileSite and DeskSite 'Search' Ribbon Bar



## 2.4.6 New DeskSite Look and Feel

These user interface improvements apply to DeskSite 9.3:

- Ribbon Bar is categorized for easier navigation
- Email / Document View toggle is now available
- Reading Pane is available on right-hand side
- Improvements made to layout of Grid View
- New icons in External User column and Status column
- User ID and Database List moved to top-right corner
- User can customize the contents and sequence of items in tree nodes

## 2.5 New Features in FileSite

### 2.5.1 Versions Can Now Be Opened from Versions Tab in FileSite

In FileSite, a user can now directly open a specific version of a document from the Versions tab of the Reading Pane (aka Document Results Frame) by double-clicking on it.

### 2.5.2 FileSite Profile Panel is Now Configurable

Users can now configure the FileSite Profile Panel to change the content and order of values that appear there.

## 2.6 New Features in Office Integration

### 2.6.1 Improved iManage 'Open' Integration in Office 2013 and 2016 Backstage View:

As part of the Office 2013 and 2016 Integration, iManage Work 9.3 has introduced additional iManage Work "Open" integration into the Office 2013 and 2016 Backstage View window in Word, Excel, and PowerPoint. This feature enables users to navigate to the desired location in iManage Work with fewer clicks when they open a document.

### 2.6.2 IWLs to Office Documents Open in Protected Mode by Default:

When the user inserts a link to an iManage Work document into an open document, the result is an IWL (iManage Work Link). To align the default behavior for IWLs with NRLs, any IWL pointing to a Word, Excel, or PowerPoint document will now open by default in Protected View Mode in the 9.3 Desktop Clients, as long as the user has Read/Write or Full Access to the indicated document version. In this mode, the user can View the document, but it is not Checked Out to them.

### **2.6.3 New Registry Setting for Non-NRL Link Documents:**

Previously, the registry key NRLFileFormat applied only to NRL link documents. Version 9.3 adds a new registry key with a string value of FileFormat. (A "non-NRL" link is a link embedded in an iManage document that points to another iManage document.)

### **2.6.4 iManage 'Save As PDF' Button Added to 'iManage' Ribbon Bar within Word:**

In the "iManage" Ribbon Bar in Word, the iManage "Save As PDF" button is now available to make it easier for the users to find, as well as being more consistent with various Integrated clients.

### **2.6.5 PowerPoint Document 'Compare' :**

The 9.3 Desktop Clients now offer the ability to use the "Compare" feature for PowerPoint documents that have been saved to iManage Work.

### **2.6.6 New Features in Adobe Reader Integration:**

Automatic Detection and Disabling of Adobe Protected Mode When you install DeskSite and FileSite 9.3, the installation wizard automatically detects Adobe Protected Mode and disables it. This feature applies to all supported versions of Adobe Reader. In the InstallShield Wizard you will see a Disable Adobe Protected Mode checkbox option, which is checked by default. During installation, do not uncheck this box. If you do, Adobe Integration will not work as expected.

## **2.7 Unicode and HIPAA**

The first biggest one, and the one that gets the most attention out of the iManage Work 10 upgrade, would of course be Unicode. With Work 10, iManage now store all free text data in the database as Unicode, as opposed to a localized code page. This really improves documents being stored and shared across multiple offices and then across countries. This is way we don't have to worry about specialized configurations for insuring that all the data gets in.

The next, more important one is providing document-level encryption. This feature, we generally call it, is the "HIPAA" feature by being able to set document classes and other metadata fields as HIPAA compliant. What this allows is these documents to be encrypted on the file server, so they're both encrypted at rest and then in transit when they are being downloaded and accessed by the WORK clients.

## 2.8 Hybrid Security Model

Another major enhancement is the hybrid security model. This sort of brings together the best of both worlds from the legacy optimistic and pessimistic modes. In this case, it's generally optimistic security, unless it comes to deny access, in which case then it sort of goes to that pessimistic security model of not allowing the user to have access to it.

Prior versions of WorkSite Server had two security models, Optimistic and Pessimistic. Now, allow me to explain Optimistic and Pessimistic security models. Let's say Julie belongs to two groups, Group A and Group B. Group A has 'Read/Write' access and Group B has 'No Access'.

In Optimistic model, the highest level will be granted to Julie and she will have 'Read/Write' access because of the Group A security. In Pessimistic model, the lowest level will be granted and she will have 'No Access' because of the Group B security.

WorkSite 9.x Server introduced a third model called, Hybrid Security model. This model resolves the issue with the previous version of optimistic security model.

Here's scenario with optimistic issue and Hybrid resolution: Henry belongs to Group C with 'Full Access' and Group D with 'NO Access'. In the optimistic security model, Henry would be granted 'Full Access', which he should not have. Hybrid Security model solves this issue by giving Henry 'No Access'. As long as 'No Access' exists, it will take precedence over any other access grant. Therefore, Hybrid Security will grant Henry 'No Access' instead of 'Full Access'. Problem solved...

If Mark belongs to Group E, with 'Read/Write' access and Group D, with 'Read Access', what access do you think Mark will be granted with Hybrid security?.....

Yes, you guessed correctly. Mark will be granted Read/Write access because Hybrid Security model is Optimistic by nature, except under the circumstance of 'No Access' and 'Denied Access'.

## 2.9 WorkSite Anywhere

WorkSite Anywhere allow you to connect to WorkSite server from anywhere by simply installing deskSite on any machine. Of course, you would need proper credentials.

### LinkSite

Lastly, Linksite which gives ability to collaborate on WorkSite documents with external users outside of the iManage Work environment without using the client software such as filesite and desksite with governance.

## Other minor improvements

- iManage Work can be deployed in Cloud or On-Premises
- Support classic clients such as DeskSite and FileSite with seamless integration
- WorkSite Web is now obsolete and the New Professional client is used instead

## 2.10 IMANAGE WORK CO-AUTHORING ADD-ON

With teams distributed across time zones, an explicit document checkout model limits the ability to produce work product efficiently. There are several limitations to an explicit checkout model:

- People must manage a schedule around editing the document
- When external collaboration is necessary, emailing documents provides a simple delivery mechanism but leaves the firm at risk of potential data leaks
- Merging changes is a manual and time-consuming process that is fraught with risk
- Some users already use private sharing solutions to collaborate without the firm's knowledge, and the resulting work product is not governed

Co-authoring for iManage Classic Clients (FileSite/DeskSite) allows users to take a fresh approach to working collaboratively on a document. While the document is still explicitly checked out, it can now be shared with a selected group of individuals. This ensures a single individual maintains control over the versioning process while all activities during this collaborative session are audited back in iManage Work on the original document. Documents are shared in the firm's secured OneDrive for Business environment during the co-authoring session, ensuring that the documents do not lose governance.

iManage's co-authoring solution provides several key benefits to both end users and the firm:

- Co-authored document auditing: Activities and contributors are audited to provide visibility into the co-authoring session.
- No dependency on a Microsoft desktop sync client: Simplified client deployment that reduces the number of failure points.
- Ability to work from any device: Users can work from their desktop and use their key tools to produce work product, or they can switch to a mobile device when only light editing is necessary. Their changes are saved so that they can seamlessly switch between devices and continue their work.
- Support for OneDrive on-premises and as part of Office 365: Flexible design allows firms to balance security with ease of deployment and easily switch between the two deployments with minimal effort. External collaborators, such as contractors, can contribute to a document without needing access to the iManage repository.

- Streamlined workflows designed for the end user: Sharing, accessing, and saving co-authored documents workflows are thoughtfully designed to minimize user friction and increase adoption.
- Advanced co-authoring workflow support: iManage Work Co-Authoring supports a variety of use cases, from internal collaboration for quick edits to complex external collaboration that can last months.
- Advanced logging: iManage Work Co-Authoring users are not just end-users; they are also the IT support staff. Advanced logging helps IT personnel to support users who run into problems.

## 2.11 Other Features

### 2.11.1 Support for email conversations:

Conversation threads for emails are displayed by default in your Recently Filed Emails and when browsing/searching within email folders. Conversations are not supported when doing a search for emails in a library or Workspace.

### 2.11.2 Support for HTTPS and NRL links:

You can send HTTPS and NRL links to any iManage Work document from iManage Work 10. The links point to the version of the document from which you generated the link. Use the HTTPS link to preview the document in iManage Work 10 from any device. You can also copy and paste an HTTPS link when composing an email or authoring a document.

If the Senders filter is applied in your current location, and then additional search criteria are applied, the sender is still retained in the search results set and visible in the Search box until cleared manually. If you run a search using a partial sender name, for example From: John, the Senders filter shows "John:" but you can narrow this by clicking on "John" in the filter. The filter then expands to provide a list of the top 5 relevant email addresses containing "John" available in the data set returned.

### 2.11.3 Filter: Top 5 Authors/Operators:

The Top 5 Authors/Operators filter appears in the following Views/Pages:

- Latest Documents view under a Workspace (aka Matter)
- Latest Documents view under a Client
- Any folder not specified as an Email Folder
- Any Document Search results set

If the logged-in user also has documents where they are the Author or Operator in the results set, the Author/Operator filter lists them as "Me." If the Authors/Operators filter is applied in your current location, and then additional search criteria are applied, the Author/Operator is still retained in the search results.

#### **2.11.4 Searching folders and sub-folders:**

Searching a folder only returns results within that folder, which offers a more targeted search results set. To search the current folder and its sub-folders simultaneously, use the Sub-folders in the Search Scope filter.

#### **2.11.5 Initials for Authors/Operators:**

Authors/Operators displayed in the following places show their user initials next to them:

- In the Authors/Operators filters in Latest Document views/search results
- In the Document Info panel
- Next to the user name of the logged-in user

#### **2.11.6 Displaying pictures for Authors/Operators:**

You can replace the user initials used as a default to identify Authors/Operators with pictures of the Authors/Operators. This is normally configured by an administrator.

#### **2.11.7 Preview NRL5 attached to filed emails:**

You can preview NRL links in filed emails to documents that reside on the same iManage Work Server you are logged into.

#### **2.11.8 Accessing iManage Share folders:**

For users with an active iManage Share account and relevant permissions to an iManage Share folder under a Workspace, clicking the Share folder automatically directs the user to the iManage Share log-in page for that folder. For active iManage Share users without access to a specific iManage Share folder, clicking the folder displays a message that this is an iManage Share folder but they may not have appropriate permissions. For users without active iManage Share accounts, clicking an iManage Share folder displays an error saying, "something went wrong."

### **2.11.9 Browser compatibility :**

iManage Work 10 is compatible with the following browsers:

iOS 9 and later with corresponding versions of Safari

Android 4A and later with corresponding versions of Chrome (The default browser on older Android devices is not supported)

Blackberry - 10.0 and later

Google Chrome 47.0.2526.111 m and later

Microsoft Internet Explorer 11 and Microsoft Edge

## 3. Steps to upgrade to latest version of iManage Work servers

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### 3.1 Upgrade Scenarios (8.5)

#### Manual Upgrade

- Enterprises with a single code page
- Documents mainly stored in a single language
- Using dbUpgrade.exe is recommended

#### iManage-Guided Upgrade

- Enterprises with profile data stored in multiple languages supported by a single code page
- Using dbUpgrade.exe is not recommended
- Contact iManage Support for assistance

CAUTION: Using Db Upgrade on a database containing profile information in languages from more than one code page can lead to the corruption of profile data and is irreversible.

### 3.2 Upgrading a Test Environment

Following are the steps for configuring and testing an upgrade to an iManage Work 10 Server.

- Restore library backups to a test server environment
- Install 10 server on the test server
- Ensure that there is adequate space in your database transaction log
- Run dbUpgrade.exe on the test library
- Look for the word "SUCCESS" at the end of the upgrade
- Check the DBUpgrade.log file for errors and troubleshoot, if necessary
- Configure the WorkSite Server service to connect to databases and file server Start the WorkSite Server service and check the server log for errors
- Install WorkSite 9.3.1 clients; test functionality and customizations

### 3.3 Upgrading a Production Server:

Following are the steps for upgrading an iManage Work 10 Server. These steps should be performed after the testing tasks have been accomplished.



- Thoroughly document all server configurations including registry settings
- Login to the iManage Work Server using the service account
- Stop all iManage Work services, set each service startup property to Manual  
Unregister all WorkSite services using imSvcIns.exe
- Backup all databases, file servers, and the iManage Work Server installation directory
- Backup the WorkSite 9.x Server registry:
  - ✓ HKEY CURRENT USER\Software\Interwoven\WorkSite
  - ✓ HKEY LOCAL MACHINE\SOFTWARE\Wow6432Node\Interwoven\WorkSite
- Uninstall WorkSite 9.x software and reboot
- Delete the iManage Work Server installation directory and the Server registry keys
- Install WorkSite Server 10
- Use imSvcIns.exe to register iManage Work 10 services on the server
- Set startup type to Manual and reboot
- Run dbUpgrade.exe to upgrade production database schema Check for errors in the DBUpgrade.log file
- Launch iManage Service Manager and reconfigure the iManage Work services
- Start the iManage Work services and review the log files

### 3.4 Display photos for users instead of initials:

As of iManage Work 9.4, you can replace the user initials used in the New Professional Client as a default to identify Authors/Operators with pictures of the Authors/Operators. You can upload a specified picture file to every library you are logged into. Each library must have the picture storage-enabled for a file server. The picture must be 96x96 and in eitherJPG or PNG format.

#### Two main options for loading images:

You can import pictures using one of two methods:

##### 1. Using the Upload User Photo tool

- Upload a photo for an individual user from a file
- Synchronize an individual user's photo from Active Directory
- Synchronizing all users' photos from Active Directory

##### 2. Using the Directory Sync tool

- Use the Exchange PowerShell to a run a command on your Exchange Server (Directory Sync will then pick up the photos during the next sync.

### **3.5 iManage Work Preview server**

The iManage Preview Server handles the previewing of documents within the new professional client and it must be installed on the separate server than the iManage Work server

### **3.6 Upgrade the IDOL iManage Indexer:**

iManage Work Server 10 R2 should be deployed with iManage Indexer 8.5 SP2 Update 2 or later to work with Unicode documents and hybrid security.

### **3.7 Requirements for WCSE 9.4**

The following software should be installed on the machine that runs WCSE 9.4.

- Windows 2012 or 2012 R2 Server, 2008 or 2008 R2 Server
- Outlook 2016 32-bit, 2013 32-bit, 2010 32-bit, or 2007 32-bit (For Send & File)

When installing Outlook 2010, you must use the Microsoft Office Suite installer, not the standalone Outlook installer, even if you are only installing Outlook.