



# User Guide

## Sharing Work Product

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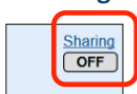
## What is “Sharing” and how do I use this feature?

MetaJure’s **Sharing** feature allows you to make some or all of your own documents, emails and/or email attachments available to all of your colleagues or just a few, such as members of your practice group or client team. **Sharing** also enables you to share all of your documents and email with your secretary or admin or to build an ethical wall to ensure that a given person does not have access to a particular file or folder.

## How do I start sharing files/folders?

By default, Sharing is turned **OFF**. To begin sharing your folders, follow these simple steps:

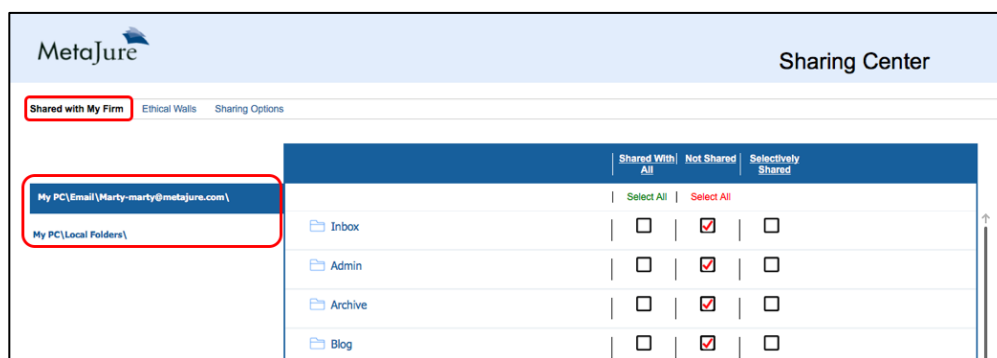
1. Launch MetaJure by clicking on the MJ Robot button on your computer’s task bar. In the top right corner of your screen, you will see a link that indicates current sharing status. (By default **Sharing is OFF**). Click on that link and it will open the MetaJure Sharing Center.



2. At the top of the MetaJure Sharing Center page, you will see three clickable links: **Shared with My Firm**, **Ethical Walls** and **Sharing Options**:

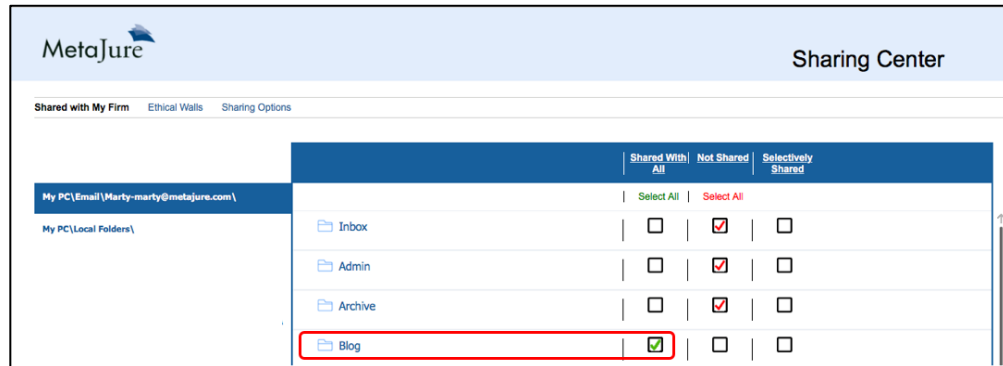


3. The **Sharing Center** automatically opens to the **Shared with My Firm** page. On the left side of the screen, you will see your email folders and PC based folders that are available for sharing. In the example below, the email account “**My PC\Email\Marty-marty@metajure.com**” has been selected and that email account’s folders are then shown to the right (e.g., Inbox, Admin, Archive, etc.). To view the PC based folders available for sharing, just click on “**MyPC\Local Folders\**” underneath the “My PC\Email\Marty-marty@metajure.com” tab in the example below.

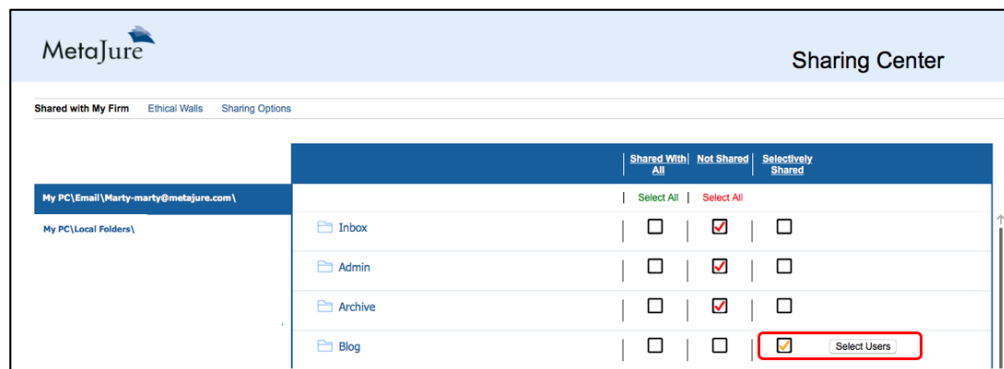


4. For each email folder and local PC folder, you have three options: **Shared with All**; **Not Shared**; and **Selectively Shared**. By default, all folders are **Not Shared**. To share a particular

folder with everybody in your law firm or legal department, just click the **Shared with All** box next to that folder. Once clicked, a green checkmark will appear in the **Shared with All** box next to that folder (the Blog folder in the below example). All items in that folder, as well as all items that you put into that folder in the future, are now available to everyone in your firm or legal department through MetaJure.



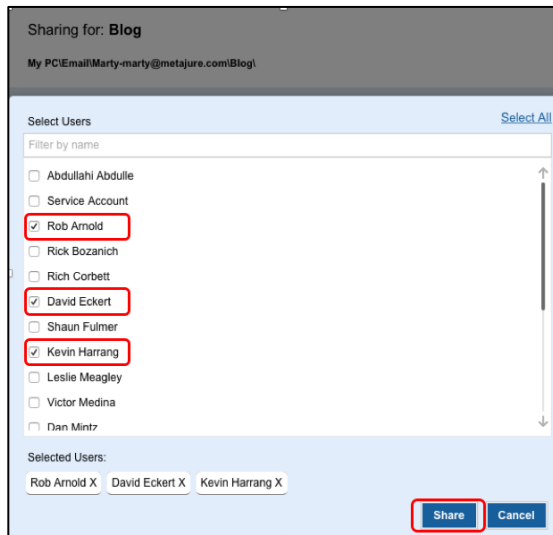
5. If you want to share a folder with a single individual or a select group, click on the **Selectively Shared** box next to the folder in question. This will cause a yellow check to appear in the Selectively Shared box next to the folder and a **Select Users** button to appear next to the checked box.



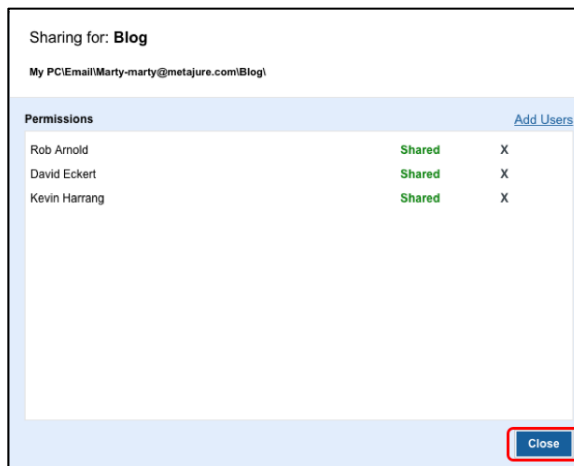
When you click on the **Select Users** button, the screen shown below will open, showing the folder for which you are setting Selective Sharing. Then, when you click on the **Add Users** button, a scrollable list of individuals from your law firm or legal department will appear so that you can identify the people with whom you want to share the contents of that folder.



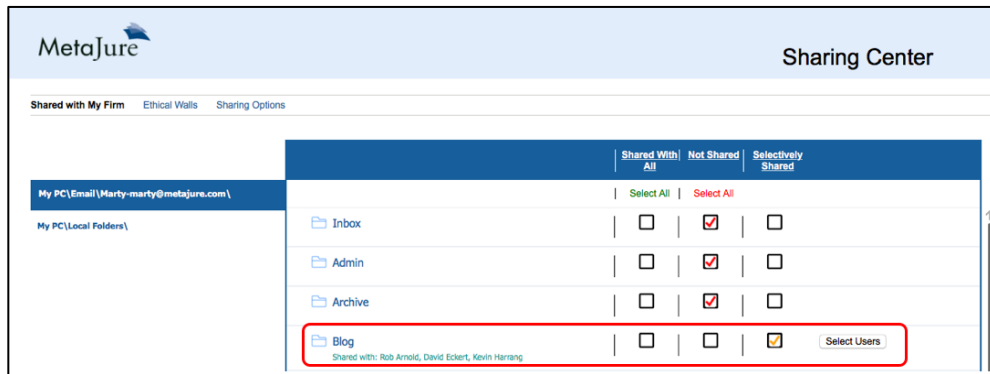
Simply select the users with whom you want to share the contents of that folder and then click **Share** as shown in the below example.



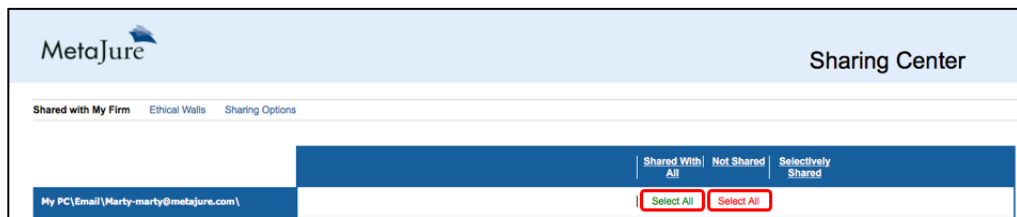
Once you have clicked **Share**, you will be taken to the screen below to confirm the users with whom that file will be shared.



Clicking on **Close** confirms your sharing selections and then takes you back to the main **Shared with My Firm** page. You will now see next to that folder the names of the users with whom you have shared the folder. If you ever want to modify the individuals with whom that folder is shared, simply click on **Select Users** and you will be able to modify your selections using the above process.



- If you have a lot of folders and want to share the majority of them with everyone, you can click on the green **Select All** button under the **Shared with All** column. That will set all folders to be shared with all users. You can then simply pick the folders you don't want shared and reset them to **Not Shared** or **Selectively Shared**. Similarly, if you ever want to change the sharing status of a given folder, just go to that folder and make the desired change. If you want to reset all of your folders to **Not Shared**, simply click the red **Select All** button under the **Not Shared** column.



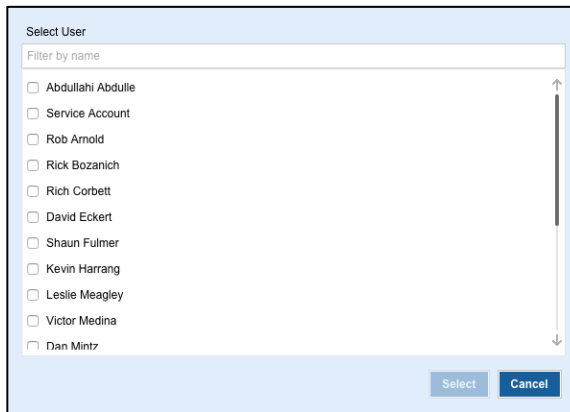
- Ethical walls** can be created around a given folder if a user or users need to be restricted from accessing that folder. An ethical wall is also an easy way to wall off a user from a given folder that you have otherwise shared with everyone. Ethical walls always trump any other sharing permissions that you have set. For example, if you have shared a folder with everyone, but now need to restrict a single user from that folder, you can simply create an ethical wall on that folder for that particular user. All other users will still have access to that folder. To create an ethical wall around a given folder, click on the **Ethical Walls** button on the **Sharing Center** homepage.



Clicking on the **Ethical Walls** button will cause the following screen to open. Once open, click on the **Create New Ethical Wall** button.



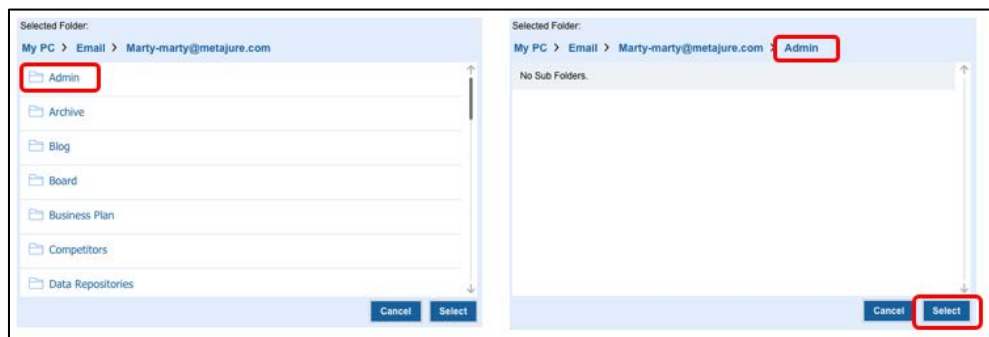
You will now be presented with the screen below. Simply select the user you want walled off from a particular folder.



Once you have selected the user you want walled off from a particular folder, you will be returned to the **Ethical Wall** page and will see the screen below, showing a new ethical wall for the selected user. Simply click the **Add Folder** button to select the folder or folders from which that individual is to be walled off.



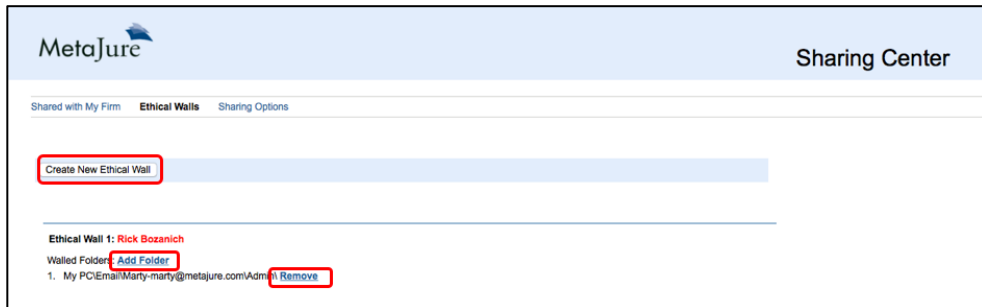
Select the folders you want the user walled off from (**Admin** in the below example), and then click **Select** to confirm.



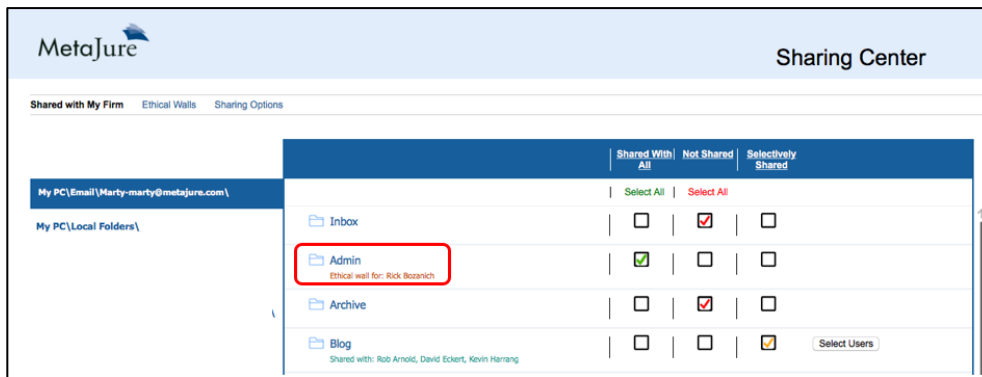
This will take you back to the **Ethical Wall** page, and show you the new ethical wall you have created. Click **Save** to confirm you want to put that ethical wall in place.



You will now be returned to the **Ethical Wall** page and will see the ethical wall that you have created. To remove that wall, simply click **Remove**. To restrict that user from another folder, simply click **Add Folder** and follow the above process. To create a new ethical wall for a different user, simply click **Create New Ethical Wall**.



When you return to the **Shared with My Firm** page, you will now see your new ethical wall next to the folder you have selected.



- The **Sharing Options** button on the **Sharing Center** home page lets you set several basic sharing principles. Get to the Sharing Options by clicking on the Sharing options button.



The Sharing Options lets you set three different options: **Email Sharing Options**, **Admin Sharing Options** and **New Folder Options**.



The screenshot shows the MetaJure Sharing Center interface. At the top, there is a navigation bar with the MetaJure logo and the text "Sharing Center". Below this, there are three tabs: "Shared with My Firm", "Ethical Walls", and "Sharing Options". The "Sharing Options" tab is active. Underneath, there are three sections, each with a red box around its title:

- Email Sharing Options:** Contains two radio buttons: "Share only attachments to my emails" (unselected) and "Share my email attachments and my emails" (selected).
- Admin Sharing Options:** Contains the text "All Email and PC folders will be shared with the selected Admins" and a button labeled "Select My Admins".
- New Folder Options:** Contains a checked checkbox labeled "Automatically share subfolders of already shared folders".

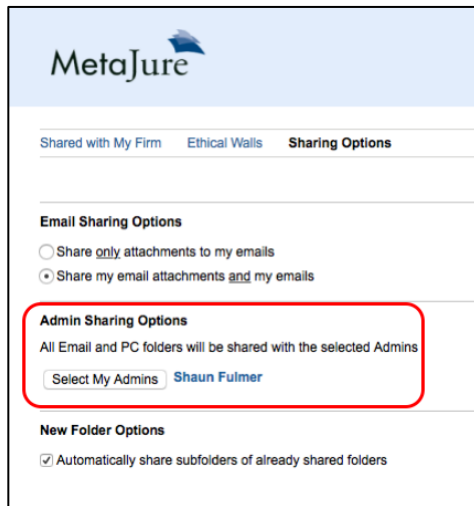
With respect to your email, you can choose to share both the text of your email and the email's attachments, or just share the attachments to your email. Select the radio button that matches your preference. Similarly, you can choose to automatically share new subfolders of your already shared folders, or can elect to make that decision on a new folder by new folder basis. Click the radio button for the preference that is right for you. By way of example, if you have a "Forms" folder with subfolders for each type of form, clicking the **Automatically share subfolders of already shared folders** will automatically share any new subfolders you set up in your Forms folder. If you have an admin, secretary or paralegal(s) with whom you want to share all of your PC and/or email folders, click **Admin Sharing Options**. This will bring up the below screen, from which you can select your admin(s), and then click **Save**.



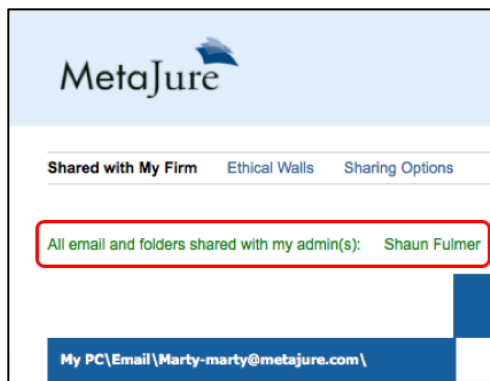
The screenshot shows the "Admin Sharing Options" dialog box. It has a "Filler by name" search bar and a list of users with checkboxes. The "Shaun Fulmer" checkbox is checked and highlighted with a red box. Below the list, there is a "Selected Users:" section showing "Shaun Fulmer X". At the bottom right, there are "Save" and "Cancel" buttons, with the "Save" button highlighted by a red box.

Once saved, your selected Admin(s) will show in the **Admin Sharing Options** section.





When you return to the **Shared with My Firm** page, your Admin sharing selection will also appear.



Once selected, all of your email folders and their contents (email text as well as attachments) and all of your PC folders will then be shared with your Admin(s). If you want to wall an Admin off from a particular folder (e.g., Personal), you can simply create an Ethical Wall on that folder for the specific Admin.

### **If I share, can my colleagues make changes to my documents and emails?**

No. Only **copies** of your PC-based documents and emails are shared with your selected colleagues. No one else can edit or delete your documents or emails using MetaJure.

### **What happens if I rename a folder?**

The MJ Robot runs a new analysis of your information every night. MetaJure will reflect the new folder name the following day. Any folder you rename will inherit the same sharing characteristics as the previously named folder. If it was a shared folder, it will continue to be shared. If it was a private folder, it will remain private.

### **What happens when I create a new folder?**

In its nightly update, the MJ Robot will discover that you have a new folder. You will then see in the upper right hand screen of the MetaJure home page below **Sharing is On**, a yellow box reminding you that you have a new folder(s) available for sharing. Clicking on this icon will take you to the Sharing

Center and open the sharing screen allowing you to decide whether or not to share that new folder(s). Once you have made your decision and selected **Save Options** and have returned to the home screen, the icon will disappear. Until you take action, your new folders **will not** be shared, unless you have selected the **Automatically share subfolders of already shared folders** radio button in the Sharing Options section of the Sharing Center. If you have made this selection, subfolders of shared folders will automatically be shared without further action from you.

### **What happens when I delete a folder?**

The standard configuration is that MJ Robot will delete the folder and its contents from MetaJure in its next nightly update. Once deleted, the folder will no longer be available to you or the colleagues with whom you may have shared it prior to its deletion, unless one or more of your colleagues created a copy of it or its contents prior to your deleting it. However, MetaJure can also be set to preserve PC documents and email on the MetaJure server for a period of time after PC deletion to meet information retention requirements.

### **What happens if a new individual joins my firm or department?**

The MJ Robot will automatically pick up that a new individual has joined your firm or legal department. You will then see in the upper right screen of the MetaJure home page below Sharing is On, a yellow box reminding you that you have a new colleague(s) with whom you can share. If you have folders that you have **Shared with All** in the **Sharing Center**, these folders will automatically be shared with the new individual, with no further action on your part. If you want to share additional folders with that new individual, clicking on this new colleague's notification will take you to the **Sharing Center** allowing you to decide whether to share folders with that individual(s) using the procedures outline above. Once you have made your decision and selected **Save Options** and returned to the home screen, the icon will disappear. Until you take action, your folders **will not** be shared with this new individual(s) with the exception of your **Shared with All** folders.

### **How do I stop sharing a folder or stop sharing with a given individual?**

In the top right corner of the MetaJure Home Page, you will see the link that indicates your current sharing status (**Sharing is ON**). Click on that link to open the MetaJure Sharing Center. Adjust your sharing preferences using the techniques described above.

### **How do I know who is sharing with me?**

Launch MetaJure to go to the MetaJure Home Page. In the filters located on the left side of the screen, click on the "+" sign next to **Shared PCs**. This will show you a list of the people sharing their PC documents and/or emails with you, along with the total number of documents/emails being shared by each individual.

**Still have questions? Contact us at 206.812.8750 or [info@metajure.com](mailto:info@metajure.com).**