

coreworkflow
Primer



CORE LEGAL **2.0**

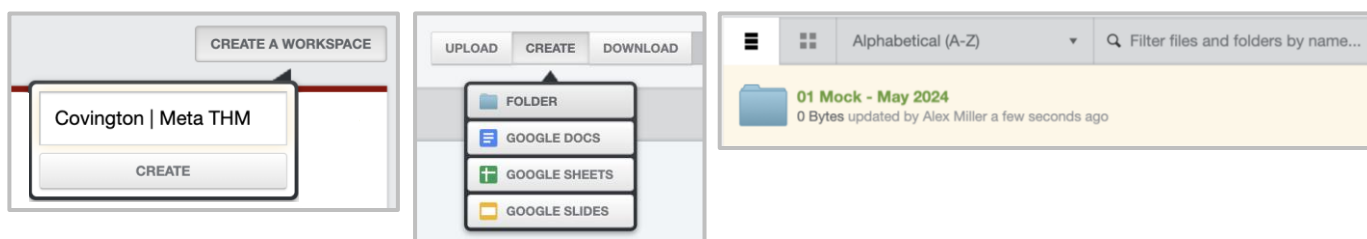
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While we have the ability to share large files with our clients via Dropbox, given that some firms restrict access to Dropbox, we also maintain a file transfer protocol (FTP) site called **Core WorkFlow** (at www.coreworkflow.com) which is built on the OneHub platform.

SETTING UP A NEW WORKSPACE IN CWF

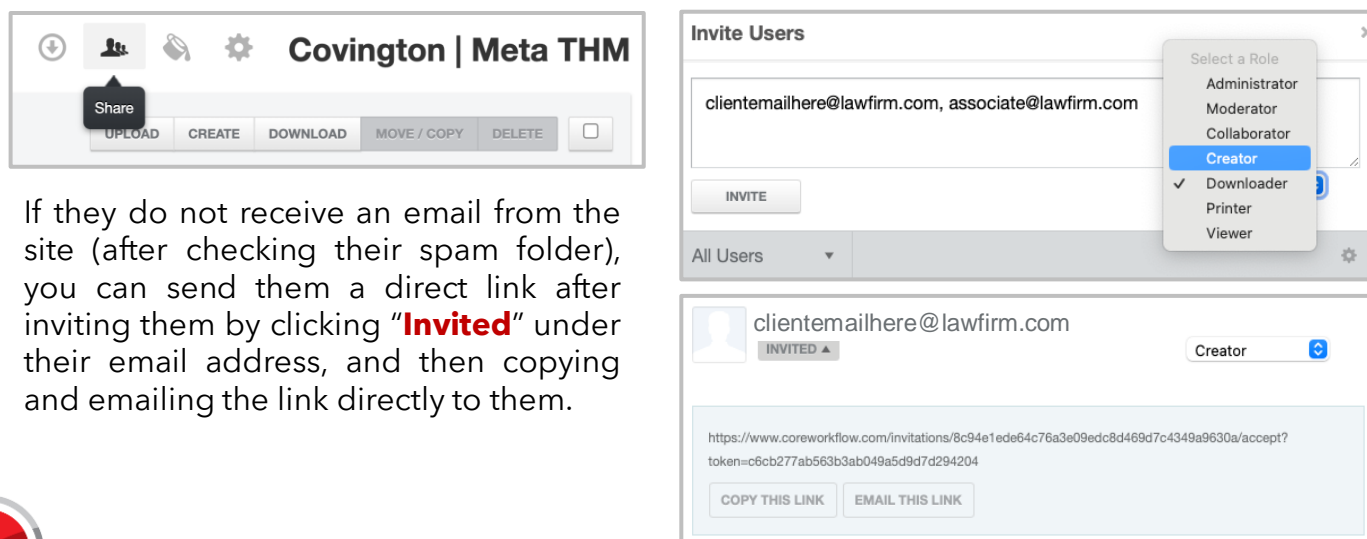
Once you are on the site, in the upper right corner you'll find a button to "**Create a Workspace**." When you click on it, you can name the folder you want to share. Usually, we name it like this: "Firm Name | Case Name."

Once inside a workspace, click the "Create" button near the top of the screen to create specific folders, such as "Exhibits," "Videos," "Demonstratives," or "Openings," etc. You can also create folders for different cases if there are multiple matters within a workspace.



GIVING ACCESS TO OUR CLIENTS

At the top level of the main workspace, click on the **Share** icon. Enter your client's email address(es) and choose "**Creator**" from the menu. This access level allows them to upload, download, and delete folders/files they create, as opposed to the Downloader role which is much more limited. Clicking "**invite**" will send an email with a link to set up a password. **(Note: there are other ways to share folders and files from the workspace without the user creating an account. Find out how on the page.)**



If they do not receive an email from the site (after checking their spam folder), you can send them a direct link after inviting them by clicking "**Invited**" under their email address, and then copying and emailing the link directly to them.

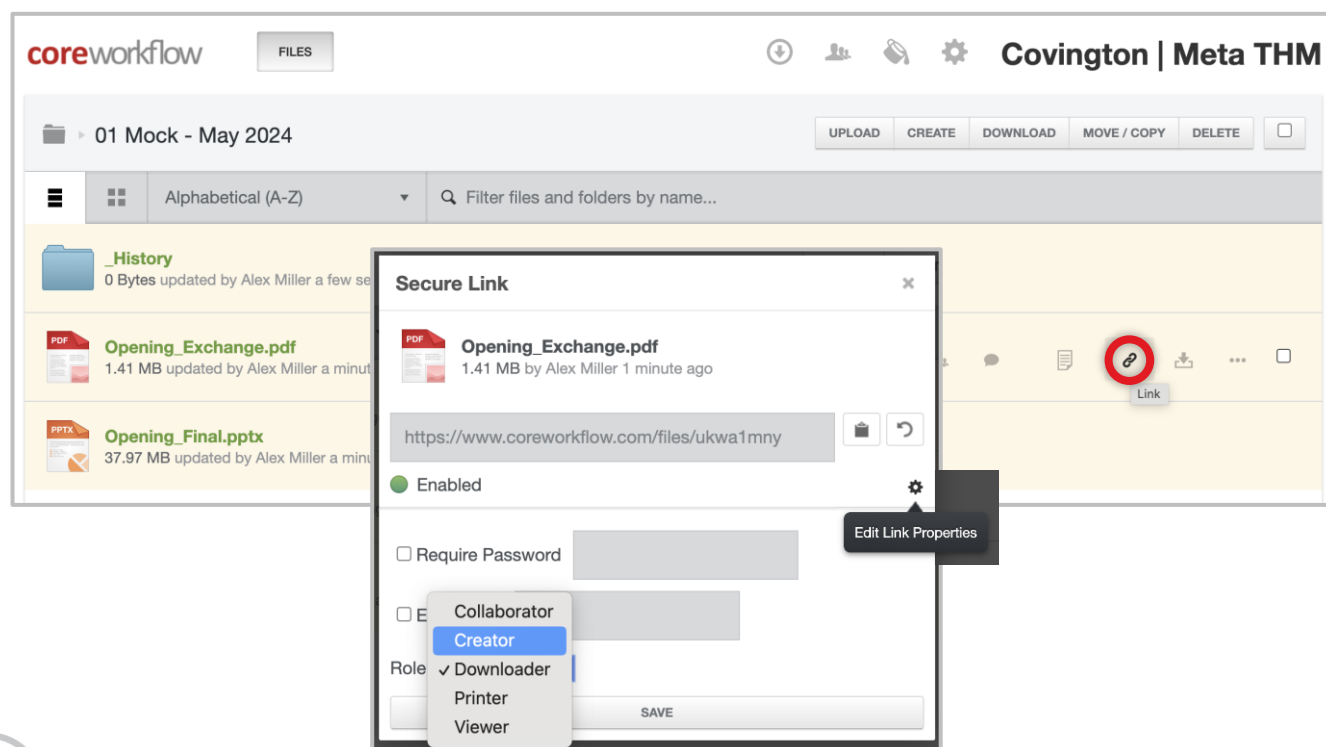
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COREWORKFLOW ROLES

Core employees and regular contractors are either **Moderators** or **Collaborators**. The default access level is **Downloader**, which only allows the user to download files. Assigning clients as **Creator** means they can upload files, delete folders and files they created, view and add comments to files, and view previews of the files on the site. The next step up is **Collaborator**, which allows the user to upload, edit and delete any file or folder. Only **Moderators** can provide secure links, which means sending a link to a file or folder that will not require a password to access the materials.

ACCESS TO FOLDERS OR FILES WITHOUT AN ACCOUNT

You may need to share a file or folder with someone who does not have an account on the site, such as the end client or opposing party or even the Court. As a Moderator, you can do this by clicking on the **link icon** for the file or folder you want to share, click on the **clipboard icon** and then copy and share the link which will allow them to **download** the file or the contents of the folder you have shared. If the user (without an account) also needs the ability to **upload** files to the folder, you can change the access level of the link by clicking on the **Gear Icon** to Edit Link Properties and change the role to Creator. You can also add extra security by requiring a password or setting an expiration date for the link. Don't forget to click **Save**.



STOPPING THOSE AUTO-GENERATED NOTIFICATIONS

When a client has an account and access to a particular workspace, they will get notification emails each time a new file is uploaded. If you're uploading lots of exhibits, these emails can be numerous and bothersome! While there is no way for us to modify a client's notification settings, they can update that on their end when they get the notification email by clicking the "**notification settings**" link. Once logged in, they can go to **Settings**, uncheck "**New File Uploads**," and then **save** the changes to prevent future notification emails.

The screenshot displays the coreworkflow interface. On the left, a notification states: "New files uploaded to Test workspace (Tech Boot Camp) . You are currently receiving instant file upload notifications for this Workspace. You can change this preference at any time from your [notification settings](#)." Below this, a message from Ryan Knecht reports a file upload: "Ryan Knecht uploaded the Schill, J-021221-1of7.mp4 File (966 MB) to the Test workspace (Tech Boot Camp) Workspace. March 02, 2024 02:10 PM". On the right, a settings modal for "Covington | Meta THM" is open. It features a "Settings" button in the top navigation bar. The modal includes a "Default Sort" dropdown set to "Alphabetical (A-Z)". Under the "DATA ROOMS" section, there are two unchecked checkboxes: "Enable Document Watermarks" and "Require a Workspace Agreement". Under the "NOTIFICATIONS" section, there are four checkboxes: "New Messages" (checked), "New Comments" (checked), "New File Uploads" (unchecked), and "New Tasks" (checked). At the bottom of the modal are "UPDATE SETTINGS" and "Cancel" buttons.

A limitation of Core WorkFlow is it only allows you to upload or download up to 1,500 items at once. To work around this, Coreys and/or clients can install Filezilla (Freeware) or any FTP client they have access to and use it to drag entire folders directly to CWF or their local machine.

After installing and opening Filezilla, go to File-Site Manager in the top left. Then, fill in the fields with your Core WorkFlow account information and click Connect.

