

Workspace Template Manager

Version 1.0

for iManage 8.x/9.x/10.x

🔜 UC Logic Workspace Template Manager	
Menu About	
🖃 MIAMI	
Client Template	
📄 🖃 Family Template	
🚊 🖂 Administration	
Billing	
Terms	
Documents	
Final documents	
Reports	
🛛 🖾 recent docs	
E Litigation Template	
📋 🖃 Private Clients Template	
Tax Template	

- Create new templates for use with iManage Workspace Manager
- Edit existing templates
- Copy existing templates to quickly create new ones

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Contents

1.	Pre-requisites	3	
2.	Installation	.3	
3.	Usage	.4	



1. Pre-requisites

This application requires either Desksite or Filesite (x86) to be installed on the PC first

2. Installation

Run the setup.exe and follow instructions



3. Usage

Run the application from the Start Menu, under All Program, UC Logic, Workspace Template Manager.

Select Login from the Menu, and login as an NRTADMIN user, or a user that has a role that allows system workspaces to be created.

After logging in the list of templates will be displayed for each database

🔡 UC Logic Workspace Template Manager 📃 🔲 🎗	<
Menu About	
MIAMI Client Template Tamplate Tax Template VOLVO BETA Case Template TEST	
Connected to WS85	.::



Right clicking on databases, templates, folders, etc. will present a pop up menu with the options available.

For example, to create a new Template, right click on a database and select New Template

To copy a template, right click the template and select Copy to, then the database where you wish to create the new template.