



**Pro-Workspace**  
RESEARCH ORGANISE PLAN

Windows Quick Start Guide  
Version 5

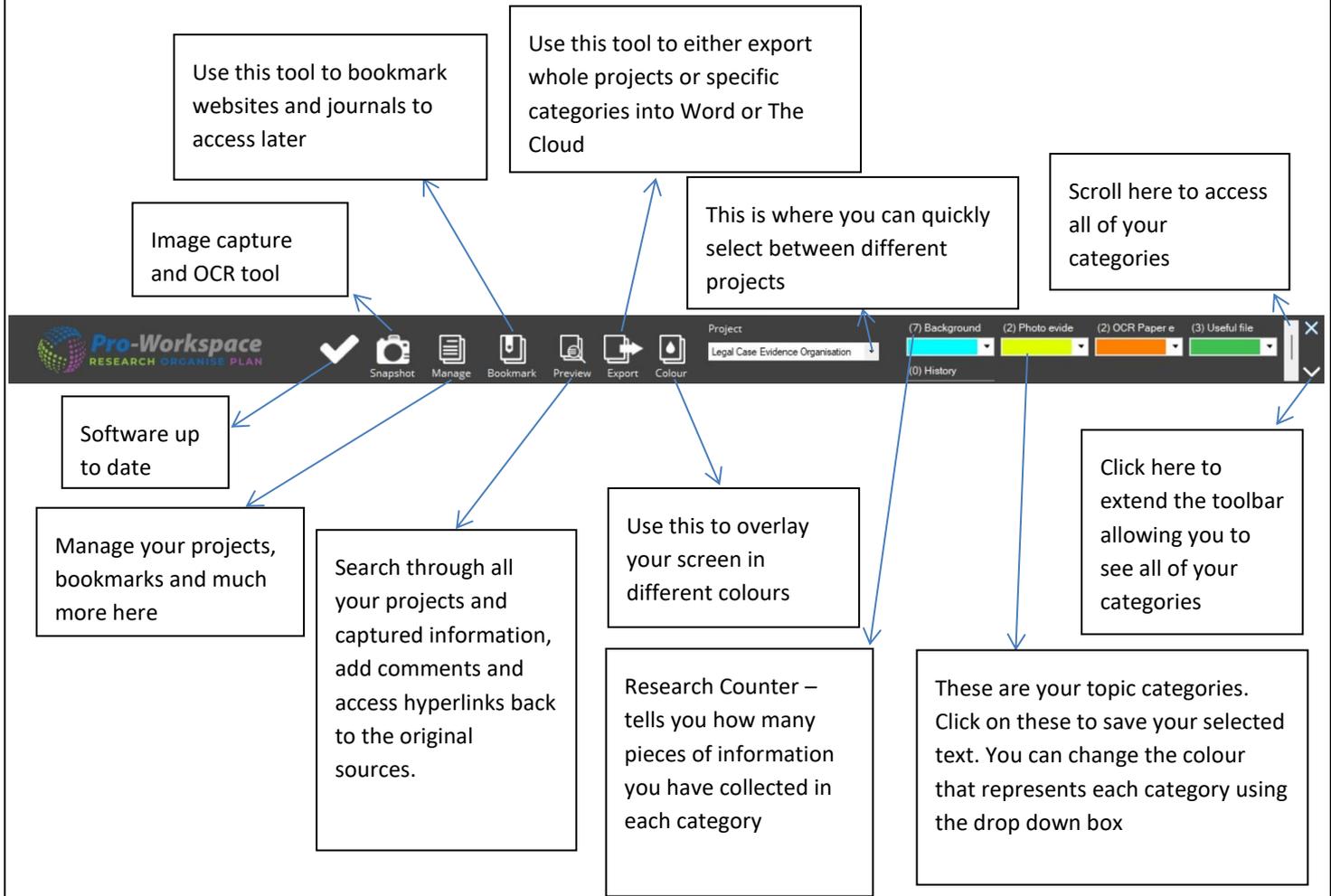
# PRO-WORKSPACE QUICK START GUIDE

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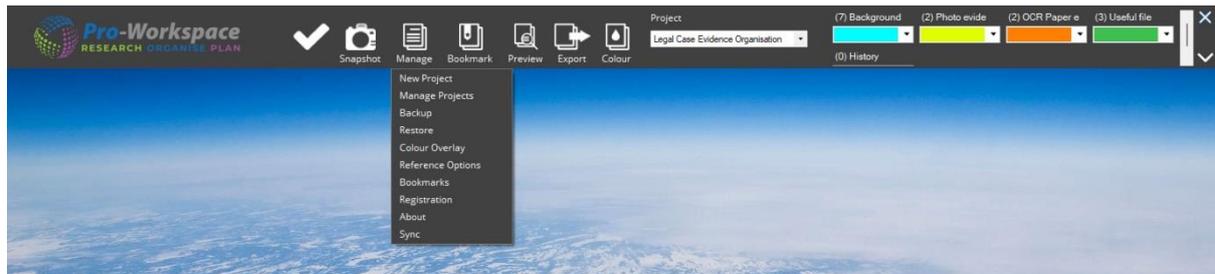
## THE PRO-WORKSPACE TOOLBAR

The Pro-Workspace toolbar sits across the top of your screen and you can use it to access all of the Pro-Workspace features.

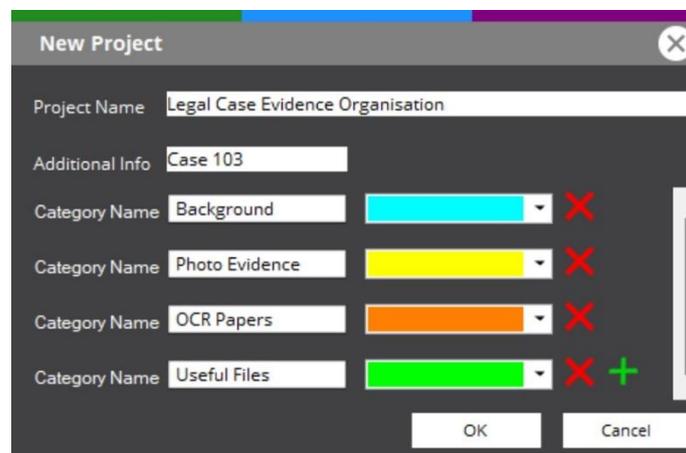


## GETTING STARTED WITH A PROJECT

- Once you have downloaded Pro-Workspace locate the Pro-Workspace programme on your computer and open it.
- When you first open Pro-Workspace the main tool bar will dock to the top of your screen
- To make a new project click on Manage and select New Project.



- Give the project a name and any additional information.
- Then give your first category a name and choose a colour in the drop down menu to represent this category (categories can be added and edited a later stage if required).

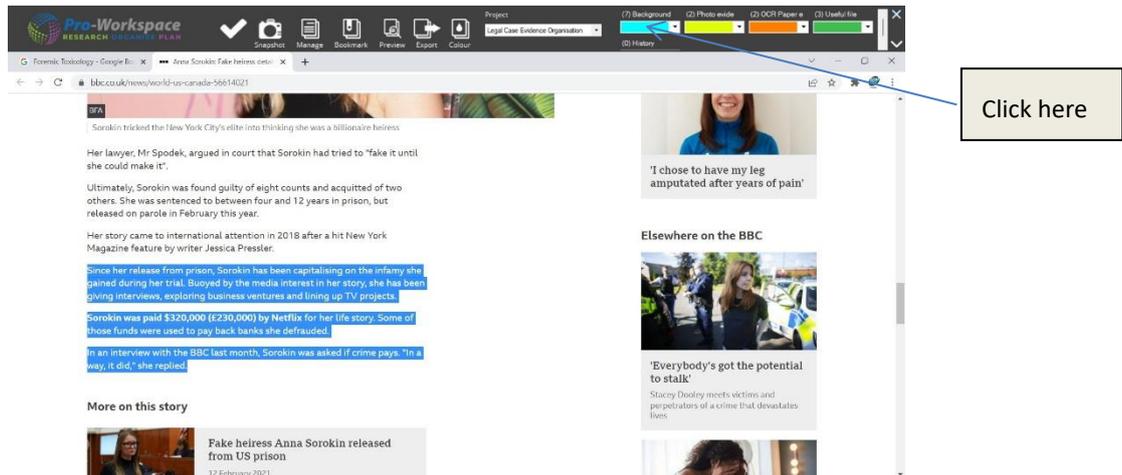


- You can choose from a wide selection of colours or even use the colour selector to pick a colour from your screen. Simply select the colour selector and click and drag to pick a colour from your screen.
- Keep repeating by clicking the  button until you have completed all the categories you require for your project and then click OK (you can add more categories later if needed).
  - *Please note – you may have a maximum of 20 categories per project.*
- Now the first project is ready to be used and should look something like the example below.



## CAPTURING INFORMATION

- Access the internet using Google Chrome, Edge or Firefox. You can also gather information from Books, Journals, E-Journals, PDFs and Word documents.
- Highlight the specific text on the webpage or document that you would like to keep and select the coloured category tab that you want the text to be stored in.



- In the previous example the user has already made a project to help with a task set on a legal case. In order for them to store a useful piece of text all they need to do is highlight the required text and click the category that this belongs to. In the example above this would be the 'blue category' as this category represents anything related to the 'Background' research.
- Pro-Workspace will then store the selected text into the category to be previewed later, including the title, date and time, referencing information and a link back to the original source.
- If you are unsure of what specific text you want you can click Bookmark to come back to a website or document later.



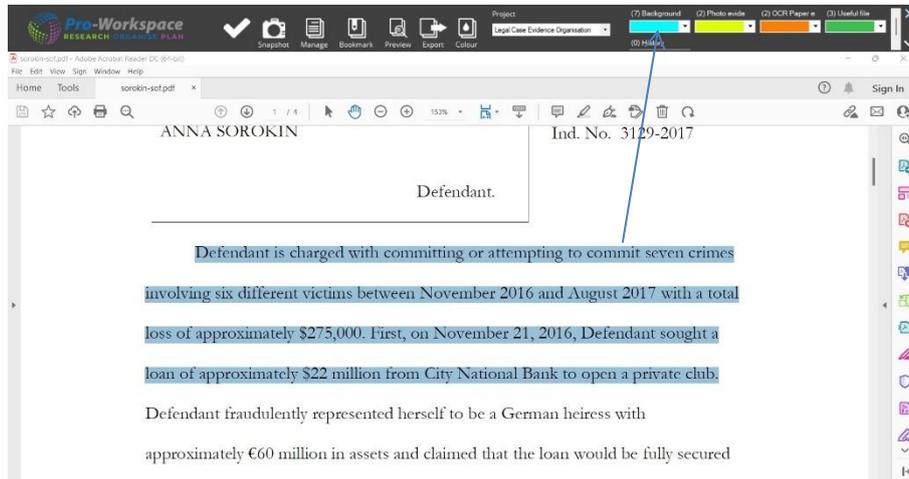
## RESEARCH CAPTURE COUNTER

As you collect each new piece of information the counter on each category will go up indicating that the piece of information has successfully been captured and how many pieces of information there are within each category. This will additionally help to focus on what needs to be researched next.

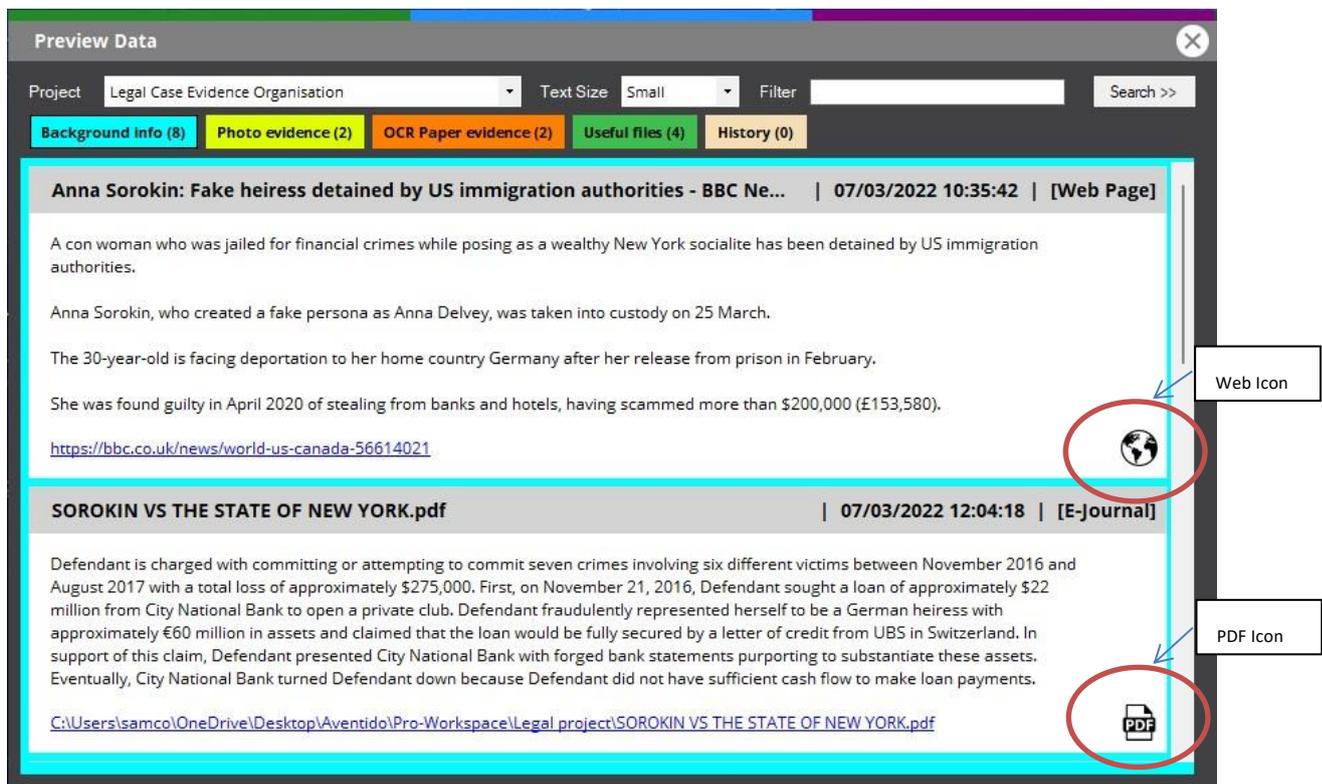


CAPTURE TEXT FROM A JOURNAL WITH A LINK BACK TO THE ORIGINAL SOURCE

You can select text in a Word document or PDF and capture that piece of information within a category by simply clicking on it. It will also make a link back to the file in the Preview Window just the same as an online source for quick access at a later date.



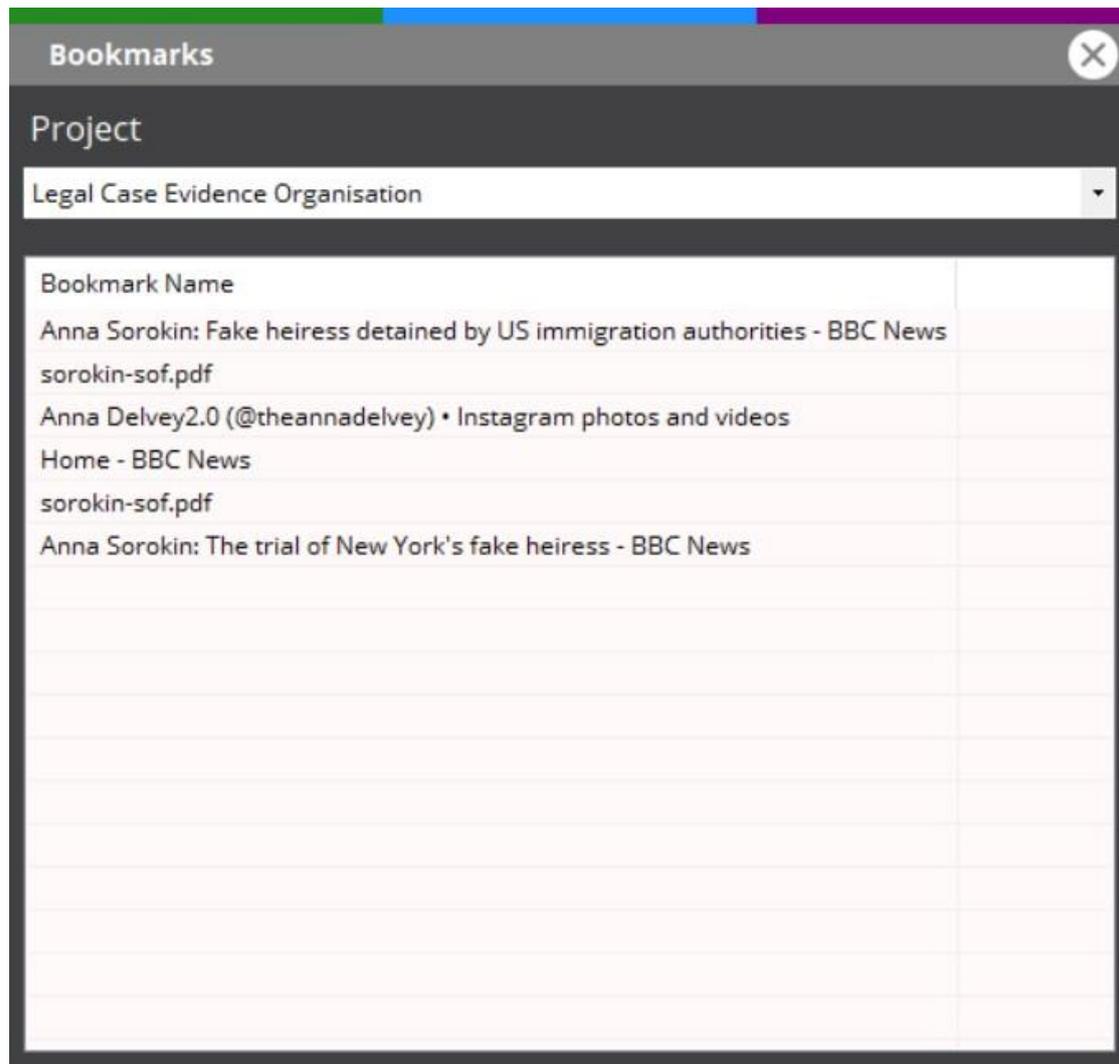
In the image below you can see the text from the PDF has been categorised and has a link back to the original source in the Preview window. It also includes an icon in the Preview window that represents the file type to help identify the correct piece of information. You can therefore easily capture and organise specific information, with links automatically made, from multiple sources e.g. PDF Articles, Journals, Word documents and Websites.



## BOOKMARK

You can save whole webpages and computer files to review later. To do this click on the open webpage or file and then click the Bookmark tool on the main toolbar.

You can view your collected bookmarks by clicking on Manage and then Bookmarks.



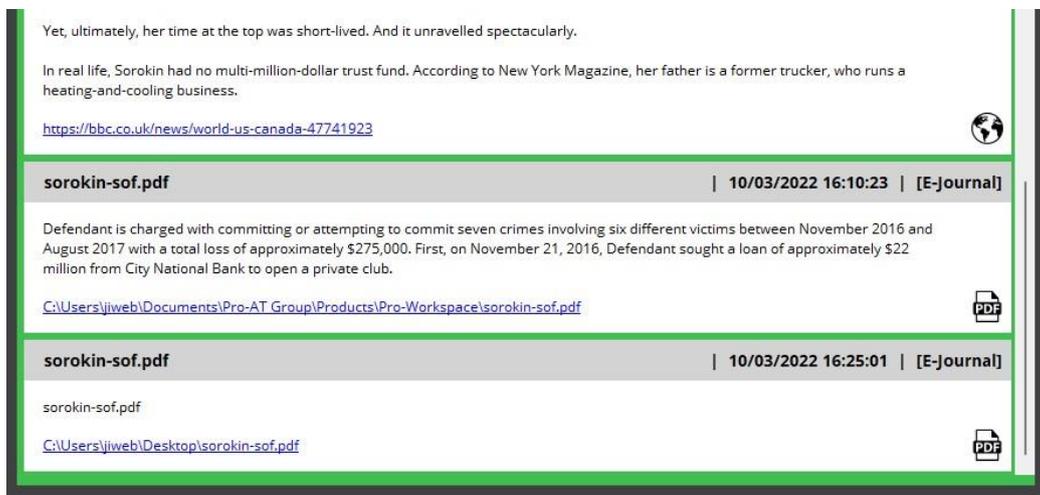
To open bookmarks choose the correct project name in the drop-down box and then click on the required bookmark.

## DRAG AND DROP WHOLE FILES ONTO CATEGORIES

You can also drag and drop whole files onto any category within a project. This is particularly useful if you want to go through a Journal at a later date to further analyse and categorise.



This can be any file type e.g. PDFs, Word documents, Images etc. This will again include file icons representing each file type capture in the Preview window.



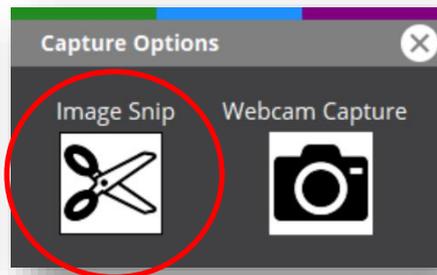
You can also add whole folders and shortcut links for websites to any category.

## IMAGE CAPTURE

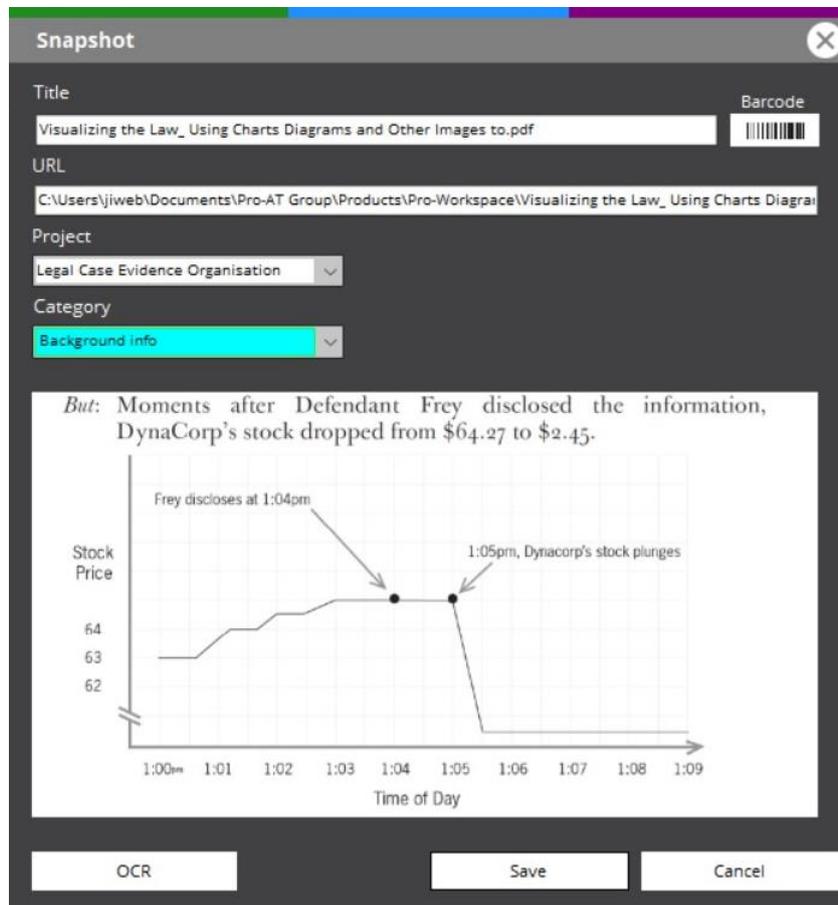
Pro-Workspace comes with an image capture feature (Snapshot).



To use this feature simply select the Snapshot tool on the main tool bar and then choose the image snip feature.



Draw a box around the desired image. You can also drag an image such as a jpeg straight onto the camera feature. The image capture window will then load and you can select the project and category to save the image. Everything else is captured automatically e.g. the URL and Title however you can edit these if required.

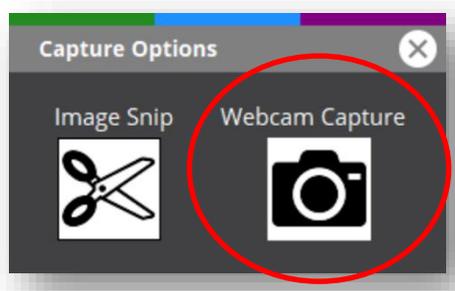


WEBCAM AND BARCODE READER (ALSO AVAILABLE THROUGH OUR COMPANION APP – PROJECT ASSIST)

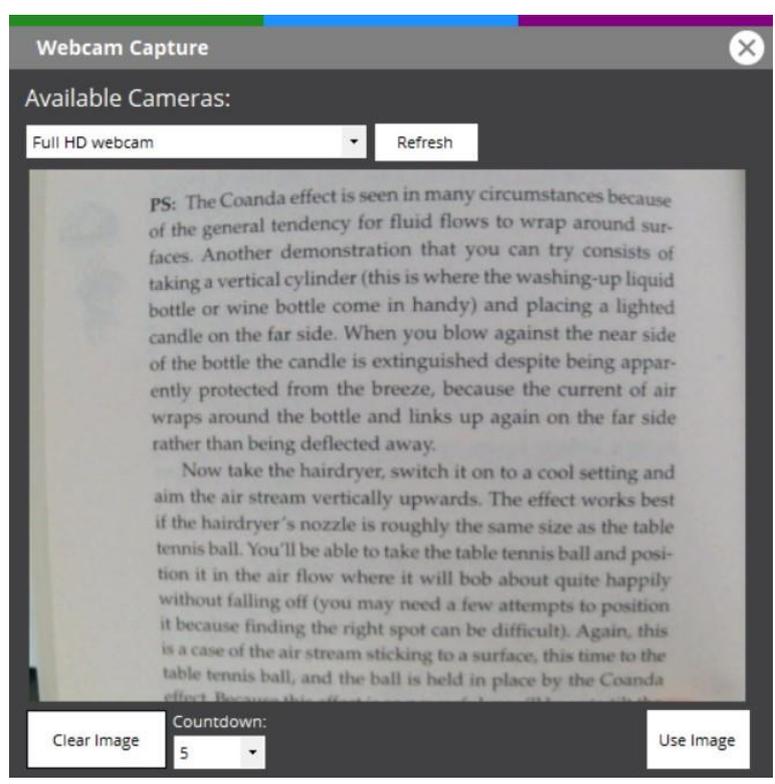
Pro-Workspace also allows you to access your webcam to take snapshots of text and images from books. You can then add the barcode from the book and it will automatically capture all the reference information.

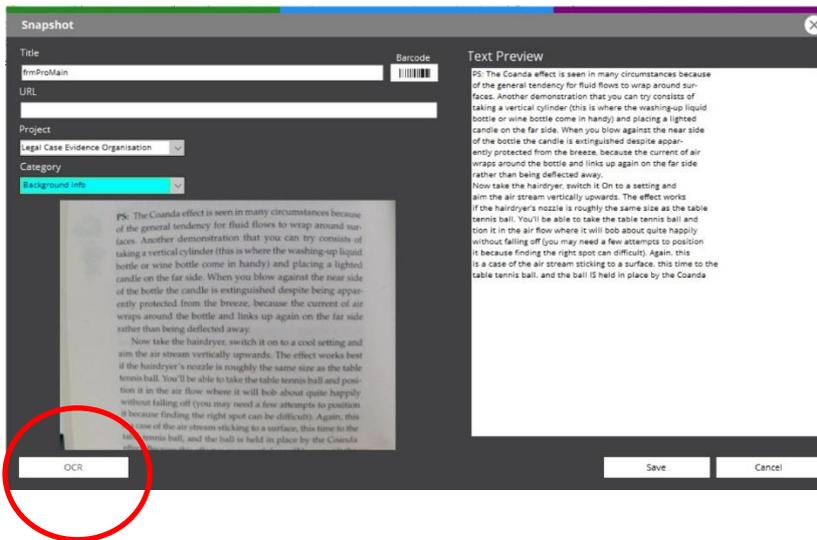


To use this feature simply select the Snapshot tool on the main tool bar and then choose the Webcam Capture feature.



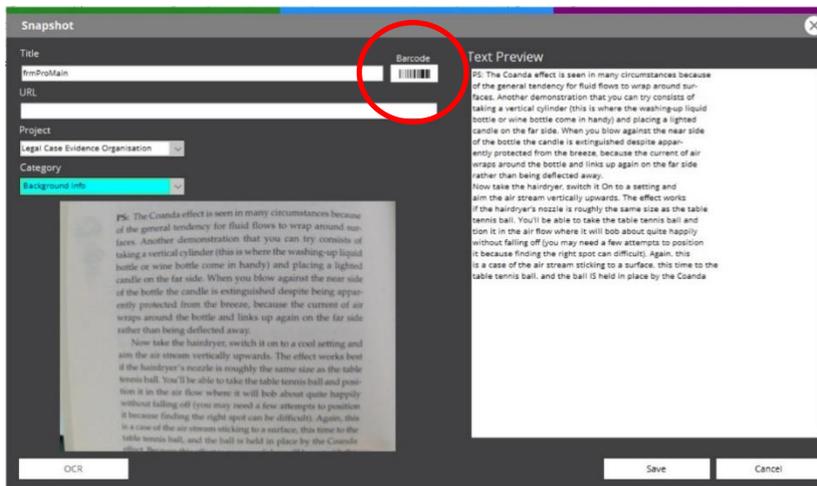
We recommend using the countdown dropdown box to give you enough time to position the page from the book in front of the camera. Click 'Take Snap Shot' and the countdown will begin. It doesn't need to be perfect as you can delete any unwanted text at the next stage. If you are happy with the image click 'Use Image'



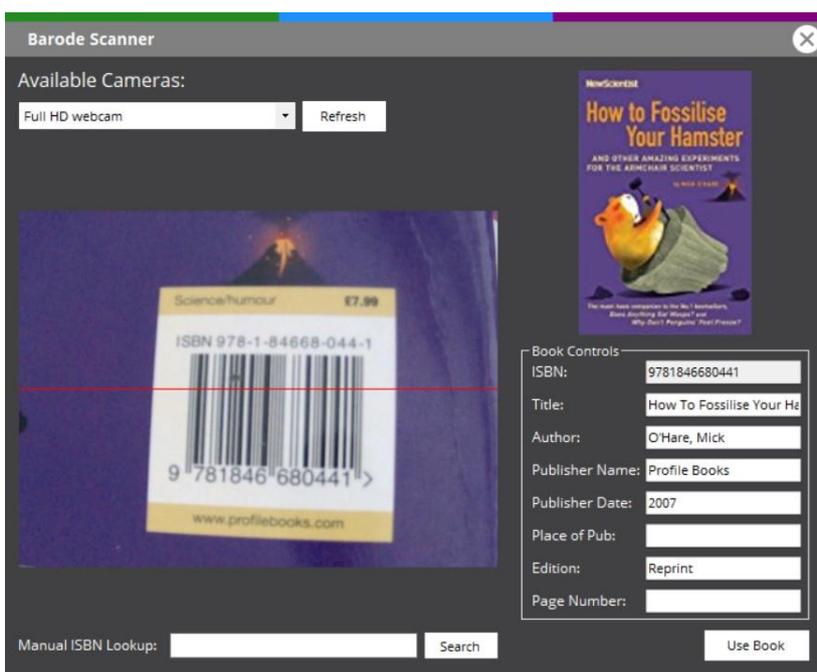


If it is an image such as a graph you can just leave the image as it is however if you want to edit some text you can click OCR so it becomes accessible text.

Once the text is accessible you can edit it as required in the Text Preview Window. This will allow you to delete any unwanted text, edit any of the information or add notes.



If you want to reference the book and cite the information you can simply click the Barcode reader feature and the Webcam will look for the barcode. The Webcam just needs to see a barcode (you don't need to click anything).

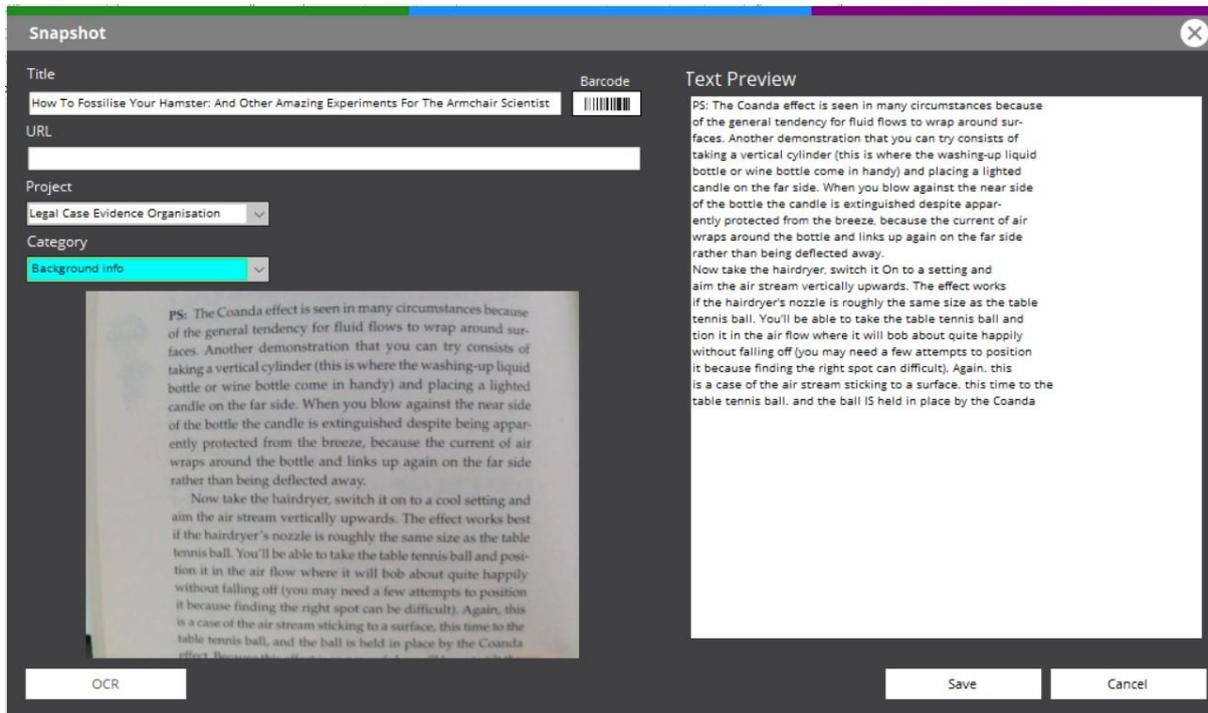


Once the Webcam has seen a barcode it will display an image of the front cover of the book with all reference information automatically displayed in the Book Controls.

If you don't have a webcam you can use the 'Manual ISBN lookup' (ISBN usually found above the barcode or inside the book). Enter the ISBN number and click Search.

The Information in the Book Controls can be edited as required.

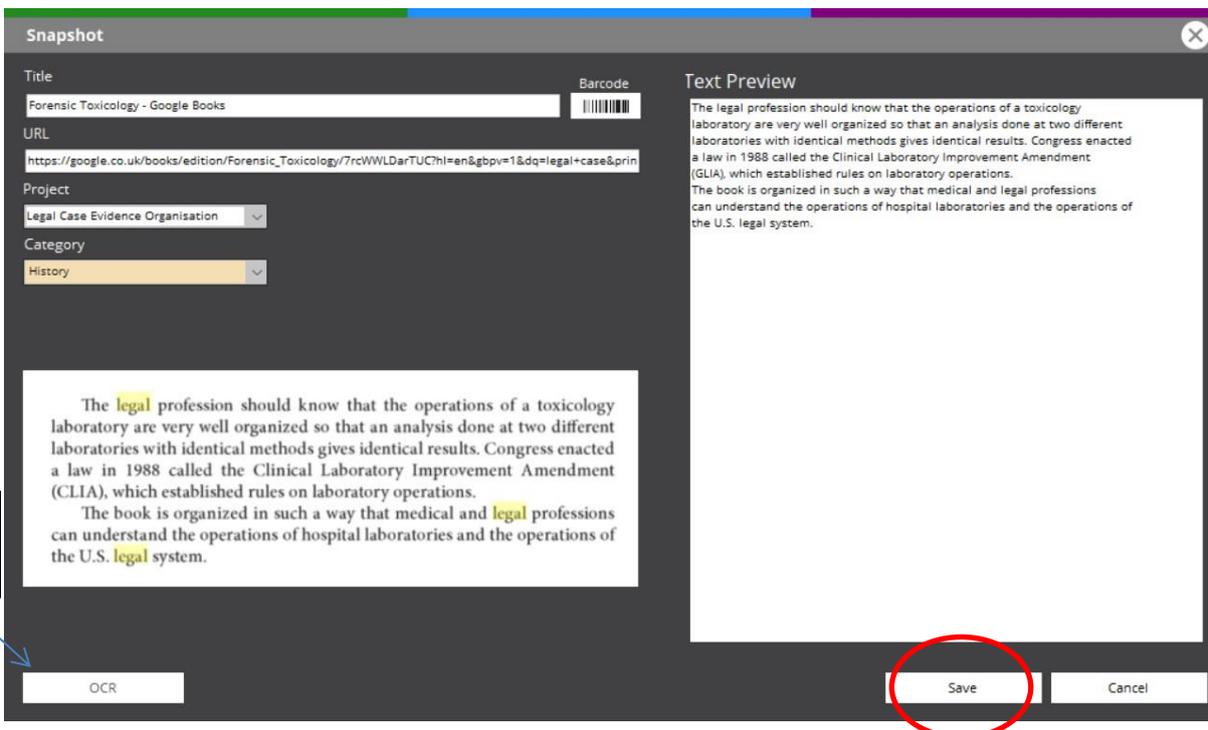
Once you have finished adding the book click 'Use Book' and this will take you back to the Snapshot Window where you can save all the information to a category.



## OCR FEATURE

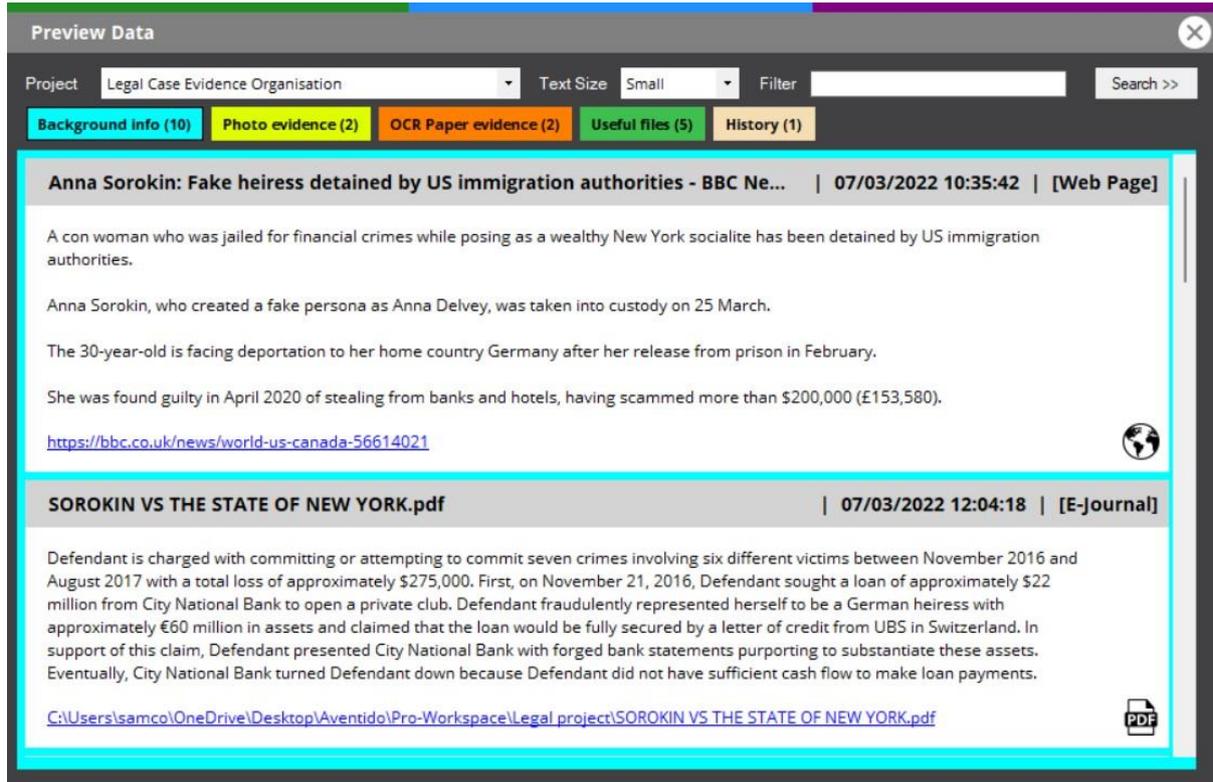
Pro-Workspace also includes an OCR tool for converting inaccessible text into accessible text. This is often an issue when using online books (E-books), Google Scholar (E-journals) etc whilst researching. The example below can be found by following [this link](#).

You use the Snapshot tool to capture the text as an image and then click the OCR tool button and it will automatically convert it for you. You then select the project and category as normal to save it.



## PREVIEW DATA

Preview your collected information in the preview window, *Preview* can be found on the main toolbar. This will allow you to access the information you have collected. This will also automatically inform you of how many pieces of information you have collected so far, titles of articles, content type, the date and time you collected them and links back to the original source.



The screenshot shows the 'Preview Data' window with the following details:

- Project:** Legal Case Evidence Organisation
- Text Size:** Small
- Filter:** (empty)
- Search >>** (button)
- Background info (10)** (selected tab)
- Photo evidence (2)** (tab)
- OCR Paper evidence (2)** (tab)
- Useful files (5)** (tab)
- History (1)** (tab)

**Item 1: Anna Sorokin: Fake heiress detained by US immigration authorities - BBC Ne... | 07/03/2022 10:35:42 | [Web Page]**

A con woman who was jailed for financial crimes while posing as a wealthy New York socialite has been detained by US immigration authorities.

Anna Sorokin, who created a fake persona as Anna Delvey, was taken into custody on 25 March.

The 30-year-old is facing deportation to her home country Germany after her release from prison in February.

She was found guilty in April 2020 of stealing from banks and hotels, having scammed more than \$200,000 (£153,580).

<https://bbc.co.uk/news/world-us-canada-56614021>

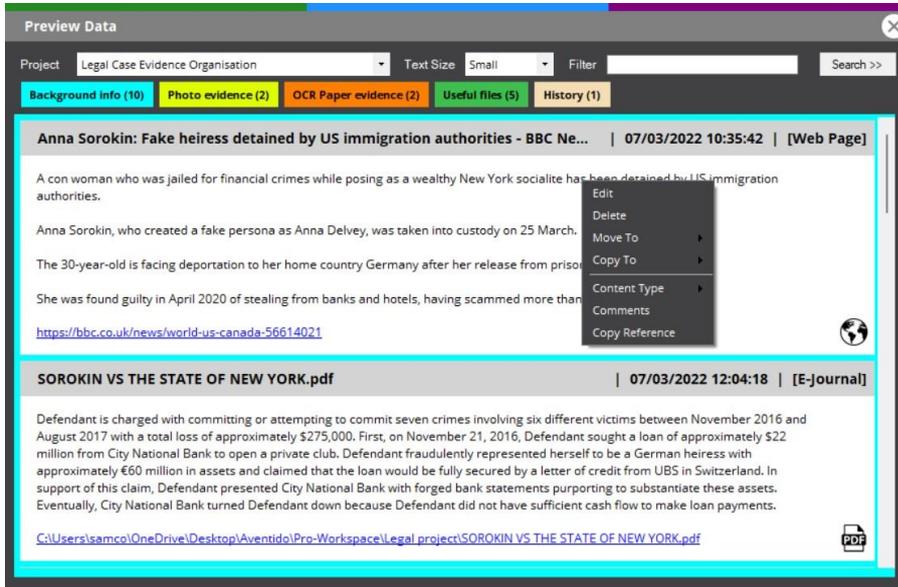
**Item 2: SOROKIN VS THE STATE OF NEW YORK.pdf | 07/03/2022 12:04:18 | [E-Journal]**

Defendant is charged with committing or attempting to commit seven crimes involving six different victims between November 2016 and August 2017 with a total loss of approximately \$275,000. First, on November 21, 2016, Defendant sought a loan of approximately \$22 million from City National Bank to open a private club. Defendant fraudulently represented herself to be a German heiress with approximately €60 million in assets and claimed that the loan would be fully secured by a letter of credit from UBS in Switzerland. In support of this claim, Defendant presented City National Bank with forged bank statements purporting to substantiate these assets. Eventually, City National Bank turned Defendant down because Defendant did not have sufficient cash flow to make loan payments.

<C:\Users\samco\OneDrive\Desktop\Aventido\Pro-Workspace\Legal project\SOROKIN VS THE STATE OF NEW YORK.pdf>

- You can change between Projects in the drop-down box at the top of the Preview Window.
- You can change Text Size in the drop-down box at the top of the Preview Window.
- You can click on different coloured tabs to change between categories.
- The background colour will indicate which category you are currently viewing.
- You can click the hyperlink which will take you back to the original source.
- You can copy a reference.
- You can View and edit any of the information you have captured.
- You can delete any information you may no longer require by right clicking on the capture and clicking delete.

## EDITING CAPTURED INFORMATION



**Preview Data**

Project: Legal Case Evidence Organisation | Text Size: Small | Filter: | Search >>

Background info (10) | Photo evidence (2) | OCR Paper evidence (2) | Useful files (5) | History (1)

**Anna Sorokin: Fake heiress detained by US immigration authorities - BBC Ne...** | 07/03/2022 10:35:42 | [Web Page]

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<https://bbc.co.uk/news/world-us-canada-56614021>

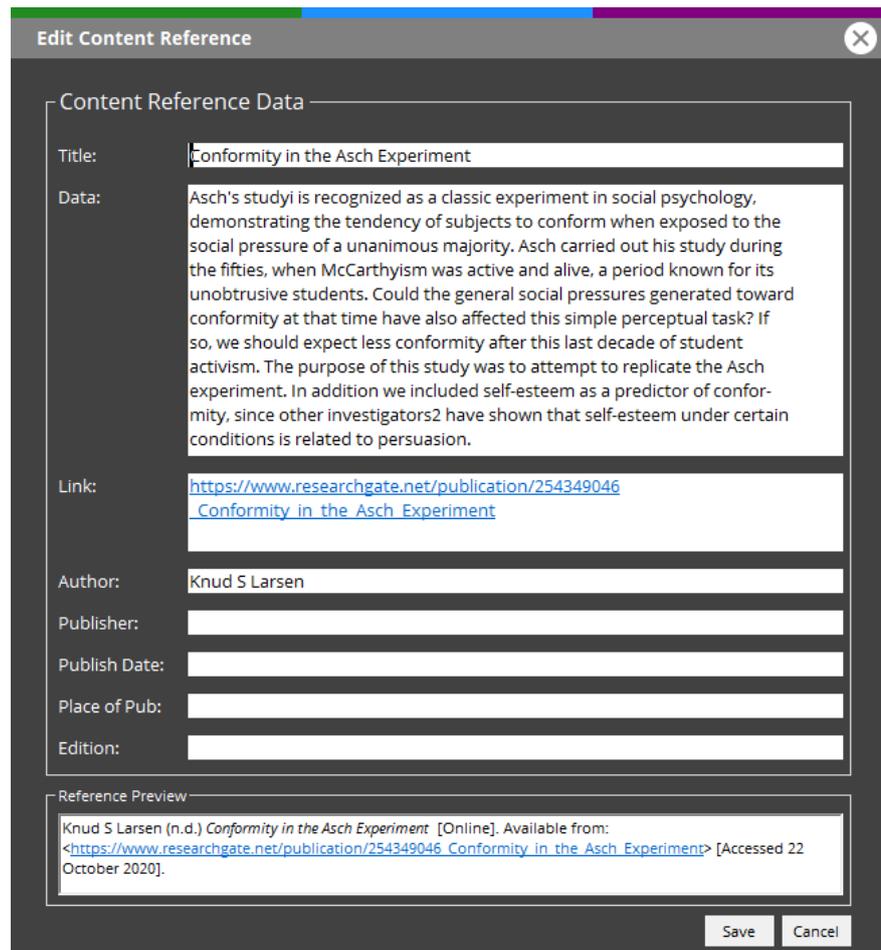
**SOROKIN VS THE STATE OF NEW YORK.pdf** | 07/03/2022 12:04:18 | [E-Journal]

Defendant is charged with committing or attempting to commit seven crimes involving six different victims between November 2016 and August 2017 with a total loss of approximately \$275,000. First, on November 21, 2016, Defendant sought a loan of approximately \$22 million from City National Bank to open a private club. Defendant fraudulently represented herself to be a German heiress with approximately €60 million in assets and claimed that the loan would be fully secured by a letter of credit from UBS in Switzerland. In support of this claim, Defendant presented City National Bank with forged bank statements purporting to substantiate these assets. Eventually, City National Bank turned Defendant down because Defendant did not have sufficient cash flow to make loan payments.

<C:\Users\samco\OneDrive\Desktop\Aventido\Pro-Workspace\Legal project\SOROKIN VS THE STATE OF NEW YORK.pdf>

Right click on the captured content and choose 'Edit'

From within the Edit Content Window, you can view all the information that has been captured and edit as required.



**Edit Content Reference**

Content Reference Data

Title:

Data:

Link:

Author:

Publisher:

Publish Date:

Place of Pub:

Edition:

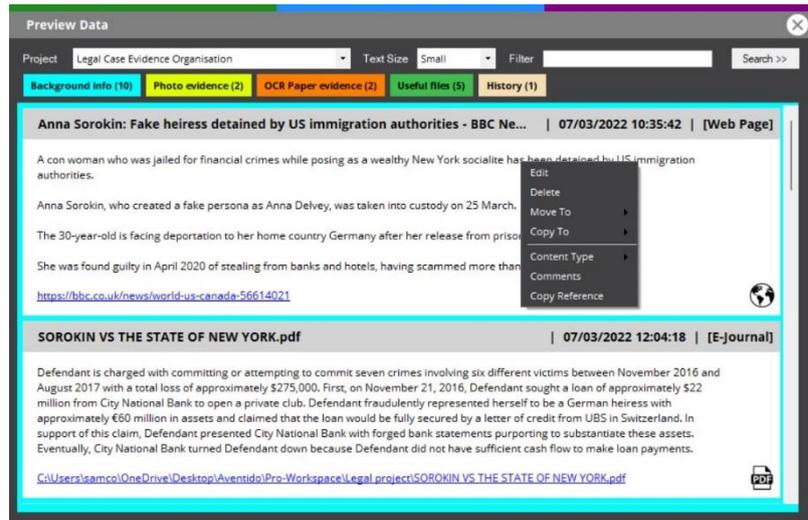
Reference Preview

Knud S Larsen (n.d.) *Conformity in the Asch Experiment*. [Online]. Available from: [https://www.researchgate.net/publication/254349046\\_Conformity\\_in\\_the\\_Asch\\_Experiment](https://www.researchgate.net/publication/254349046_Conformity_in_the_Asch_Experiment) [Accessed 22 October 2020].

Save Cancel

## COPYING A SINGLE REFERENCE

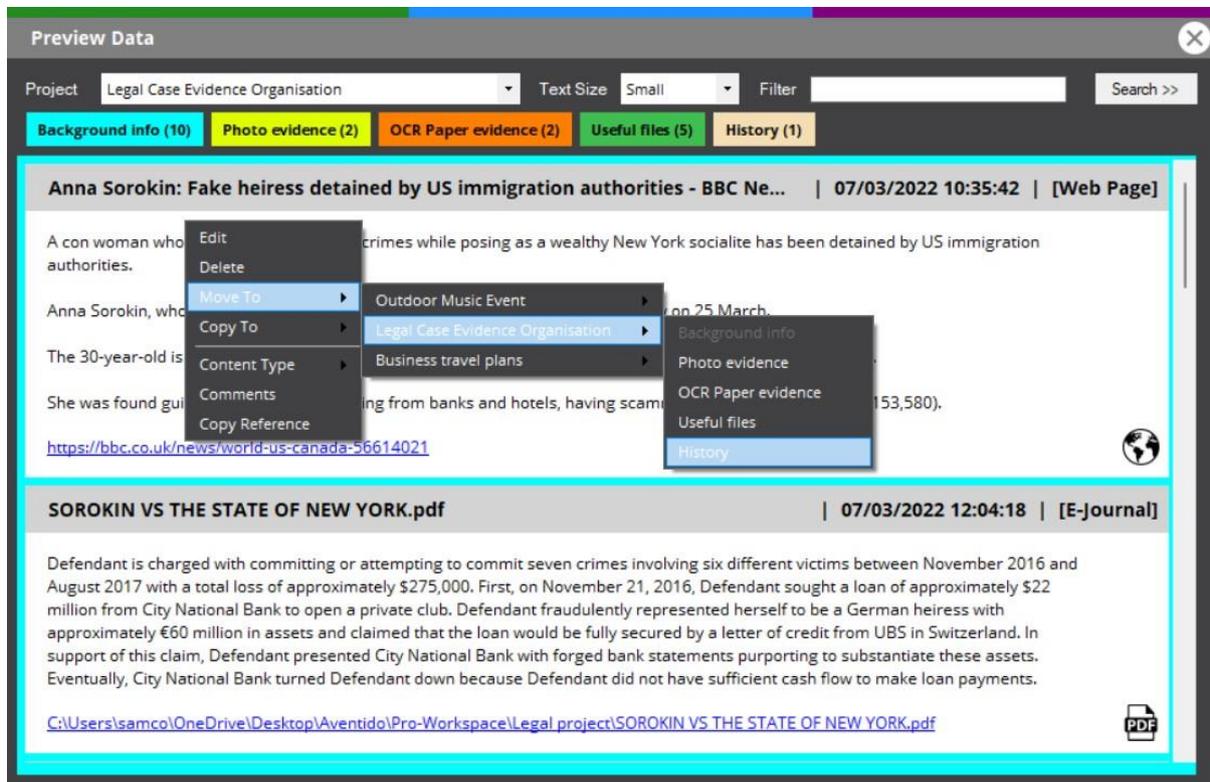
Right click on the captured content in Preview and click 'Copy Reference'. This will copy the reference (in the style you have chosen in the reference options) and allow you to paste it straight to another document.



## MOVING AND COPYING CAPTURED INFORMATION

You can also move or copy previously captured information between projects and categories. A very useful tool as research projects grow or you need the same research for new tasks and projects.

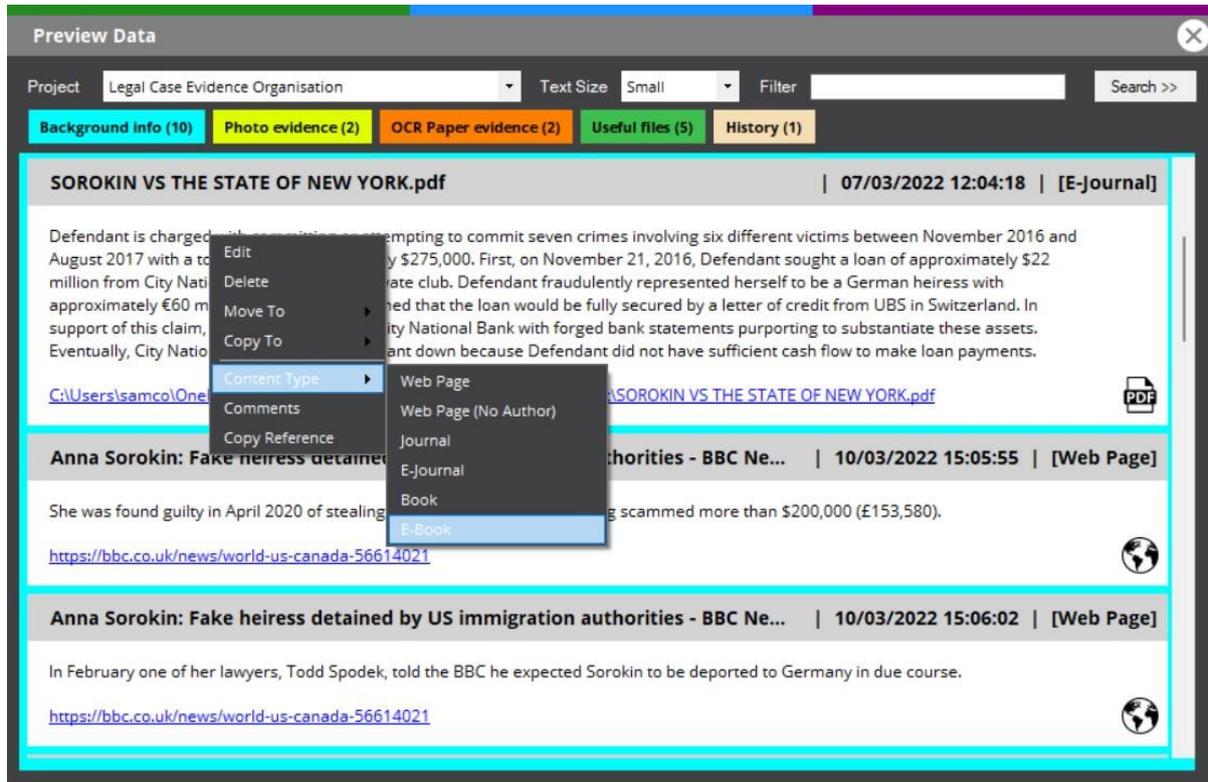
To do this right click on the desired piece of information in the Preview Window and choose if you wish to copy or move it, then you choose the project and category and Pro-Workspace will perform the task.



## CONTENT TYPE

Pro-Workspace will automatically detect the content type of a piece of information e.g. E-journal to help identify the original source and aid with the referencing style.

If the content type automatically detected needs changing right click on the information within the Preview Window and choose a different type.



The screenshot shows the 'Preview Data' window with a project named 'Legal Case Evidence Organisation'. It displays a list of items with a context menu open over the first item, 'SOROKIN VS THE STATE OF NEW YORK.pdf'. The menu options are:

- Edit
- Delete
- Move To
- Copy To
- Content Type
  - Web Page
  - Web Page (No Author)
  - Journal
  - E-Journal
  - Book
  - E-Book
- Comments
- Copy Reference

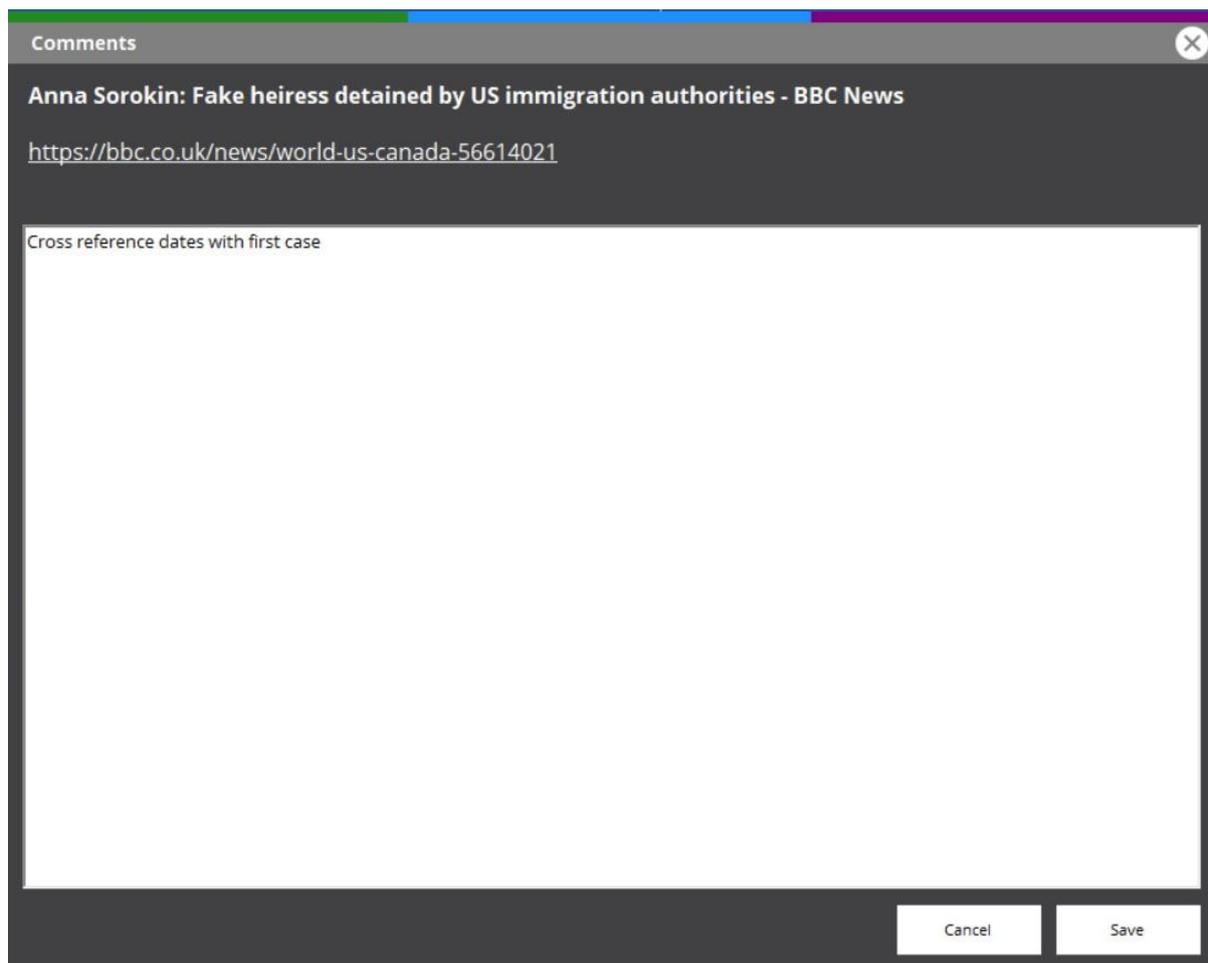
The item details shown are: **SOROKIN VS THE STATE OF NEW YORK.pdf** | 07/03/2022 12:04:18 | [E-Journal]. The preview text reads: 'Defendant is charged with attempting to commit seven crimes involving six different victims between November 2016 and August 2017 with a total value of approximately \$275,000. First, on November 21, 2016, Defendant sought a loan of approximately \$22 million from City National Bank. Defendant fraudulently represented herself to be a German heiress with approximately €60 million in assets. Defendant stated that the loan would be fully secured by a letter of credit from UBS in Switzerland. In support of this claim, Defendant provided forged bank statements purporting to substantiate these assets. Eventually, City National Bank discovered the fraud and the loan was called down because Defendant did not have sufficient cash flow to make loan payments.'

If a webpage has no author the reference style will automatically change to the Web Page (No Author) style on Export.

## COMMENTS

You can add comments to your individual pieces of captured information within the Preview Window.

To access the comments, go to a piece of information captured within the Preview Window and right click on it, this will open a menu in which you can click 'Comments'. Click 'Edit', add your note and then click 'Save', you will see the piece of information now has a comment 🗒 icon in the Preview Window which can be selected to view and edit the comment.



You will have the option to include the comments in your report when Exporting.

## KEYWORD SEARCH

The Pro-Workspace search feature allows you to quickly search through all of your projects using keywords. Pro-Workspace will then show easy to follow results from all of your previous projects within the database.

If Pro-Workspace has been used for multiple projects, then the list should be quite extensive with results from Books, Journals, Websites, Articles etc. Results can also be used again by adding them into a category within a new Pro-Workspace project using the 'copy' feature.

The screenshot shows the Pro-Workspace search interface. At the top, there's a search bar with the text 'anna' and a magnifying glass icon. Below the search bar, there are 10 results listed. The first result is 'Anna Sorokin: The trial of New York's...' with a snippet of text. The second result is 'Anna Delvey2.0 (@theannadelvey) • Ins...' with a snippet of text. The third result is 'How scammers like Anna Delvey and the...' with a snippet of text. The fourth result is 'Anna Sorokin: Fake heiress detained b...' with a snippet of text. The fifth result is 'Anna Sorokin: Fake heiress detained by US immigration...' with a snippet of text. The left pane shows a preview of a document titled 'SOROKIN VS THE STATE OF NEW YORK.pdf' with a snippet of text. The right pane shows a list of search results with categories like 'Legal Case Evidence' and 'Photo evidence'.

To use the Search feature, go to the Preview Window and click 'Search' to open the search side panel. Enter the word you are looking for and click the magnifying glass or press enter.

The results will be displayed below with the title of the project, the colour of the category, category title and a snippet of the text from the result. Select the result you want to open and Pro-Workspace will take you to the project and category and highlight it for you.

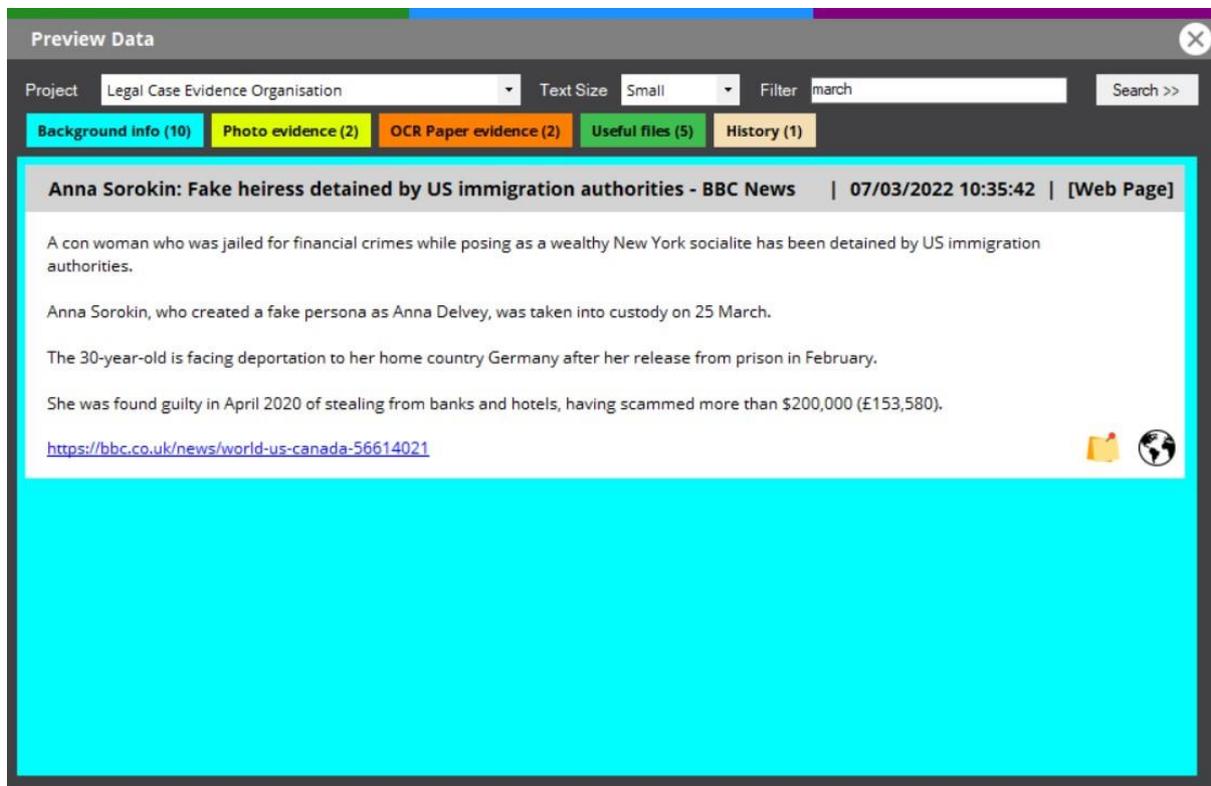
The results panel will stay open until you close it, allowing you to work your way through all the results.

## KEYWORD FILTER

You can filter the category you are working on with specific keywords to help locate sources of information quickly.

Filter

In this example 10 captures have filtered down to just 1.



The screenshot shows a 'Preview Data' window with a search filter set to 'march'. The interface includes a project dropdown menu, text size settings, and a search button. Below the search bar are several category buttons: 'Background info (10)', 'Photo evidence (2)', 'OCR Paper evidence (2)', 'Useful files (5)', and 'History (1)'. The search results are displayed in a list, with the top result highlighted in cyan. The result is a news article from BBC News titled 'Anna Sorokin: Fake heiress detained by US immigration authorities' dated 07/03/2022 at 10:35:42. The article text is visible, and a URL is provided at the bottom. There are also icons for a folder and a globe next to the URL.

Preview Data ✕

Project  Text Size  Filter  Search >>

**Background info (10)** **Photo evidence (2)** **OCR Paper evidence (2)** **Useful files (5)** **History (1)**

**Anna Sorokin: Fake heiress detained by US immigration authorities - BBC News** | 07/03/2022 10:35:42 | [Web Page]

A con woman who was jailed for financial crimes while posing as a wealthy New York socialite has been detained by US immigration authorities.

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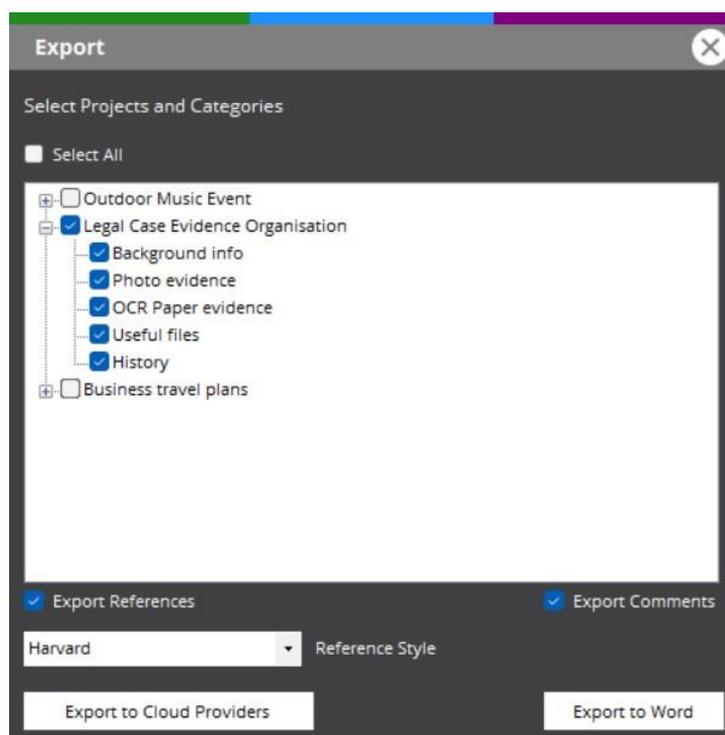
<https://bbc.co.uk/news/world-us-canada-56614021>  

## EXPORTING TO MICROSOFT WORD AND THE CLOUD

- Exporting your projects will generate a useful document that will contain all of your captured information from your selected categories.
- It will also include a navigation pane, contents page and a Bibliography.
- Use the Export tool on the main toolbar to access the Export window.
- You can export whole projects or individual categories into Microsoft Word or the Cloud. Cloud platforms include Pro-Workspace Cloud, Google drive, Dropbox and OneDrive.
- Exporting your projects to the Cloud will allow you to download and view your research from any device that has Microsoft Word installed.

## EXPORT TO WORD

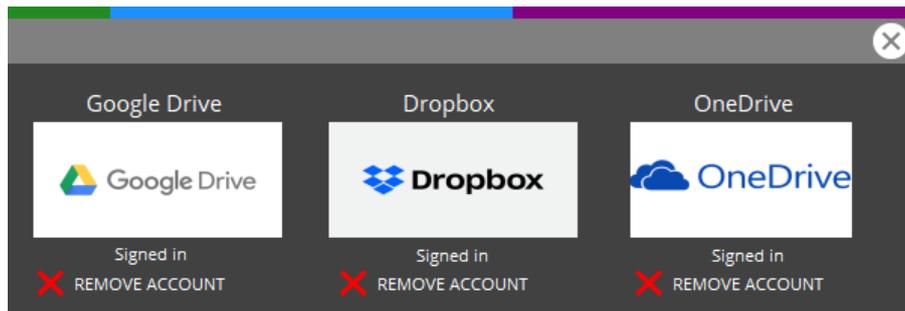
- To do this tick the boxes of the individual categories or whole projects.
- Choose your Reference Style.
- Choose if you want comments exported.
- Then click Export to Word to export your chosen projects straight into MS Word



- It will ask you where to save the Word document.
- Once you click save it will save the Microsoft Word document and then open it automatically. The Word document will be a full report containing all of your research.

## CLOUD PLATFORMS – EXPORTING AND DOWNLOADING

- Choose your Projects and categories and click 'Export to Cloud'.
- Then choose one of the following Cloud platforms – you will need to enter your username and password the first time you do this.
- Login to your cloud platform on any device and you will be able to see your project.



## PRO-WORKSPACE DASHBOARD

- Pro-Workspace Dashboard - visit the Pro-Workspace website, navigate to the portal and login to the dashboard area using the same username and password you used when registering.
- In the dashboard area you will be able to download any of the research you have previously exported to the Pro-Workspace Dashboard into Microsoft Word.
- Once logged in scroll down and you will be able to see your projects.
- Once you have located the required project click download and this will download the file.
- In the Dashboard you can also view your account details.

|                         |                   |
|-------------------------|-------------------|
| <b>Name</b>             | John Smith        |
| <b>Username</b>         | proadmin          |
| <b>Email Address</b>    | demo@pro.co.uk    |
| <b>Telephone Number</b> | 0123456789        |
| <b>Date Joined</b>      | 15/12/2015 8:56pm |

- Edit Profile
- Change Password
- Logout

### Licencing

| Licence Key  | Expires    |
|--------------|------------|
| 1JV0Q8LAEMQ4 | 31/12/2030 |

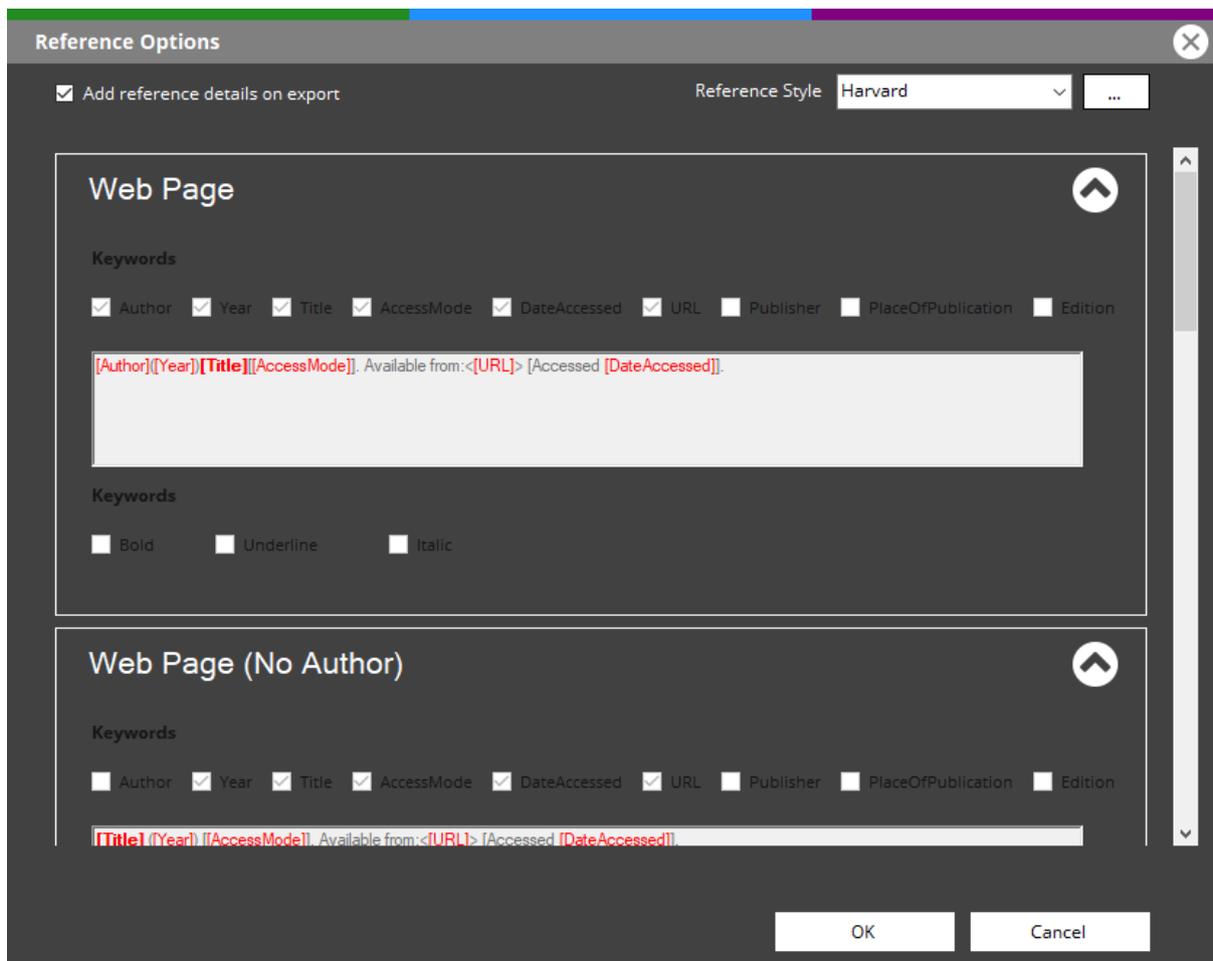
### My Project Files

| Project                          | Filename   | Uploaded   | Download | Delete |
|----------------------------------|--|------------|----------|--------|
| Legal Case Evidence Organisation | legal-case-evidence-organisation-11032022-1635.doc | 11/03/2022 | Download | Delete |

## REFERENCE OPTIONS

Click 'Manage' and the 'Reference Options' option to access the Reference Options window.

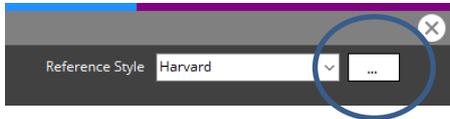
In this window you can view and edit referencing styles, these include Web Pages, E-Journals, Journals, E-Books and Books. Pro-Workspace comes with Harvard and APA as default. You can add more styles from a built-in list of over 9500 different pre-set styles and you can customise your own styles as well.



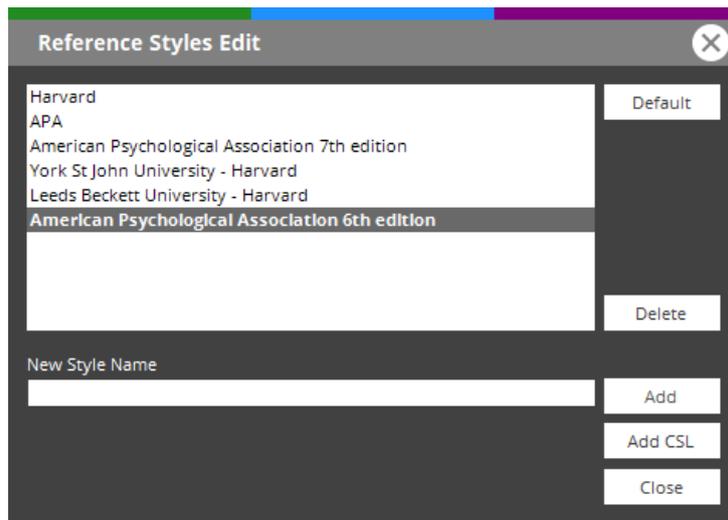
- You will be able to choose what you need to be included in the referencing style e.g. Author, Year, Title etc and also change the order this information is to be exported into Microsoft Word.
- You can also change which bits of information need to be in Bold, Italics and Underlined.
- As well as the option to add any of your own information (anything in Red Pro-Workspace will attempt to automatically find and include in the bibliography).

**PRE-SET REFERENCE STYLES (CSL)**

To add more pre-set styles in the reference options, click the three dots in the top right-hand corner next to the Reference Style in Reference Options.

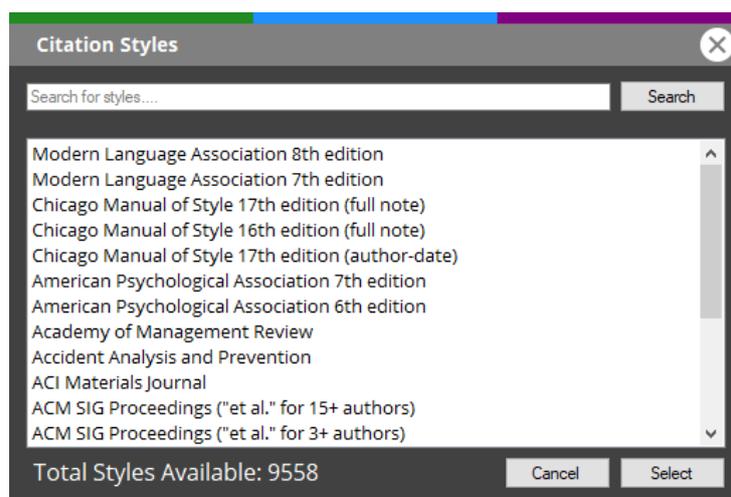


This will open the 'Reference Styles Editor' Window.



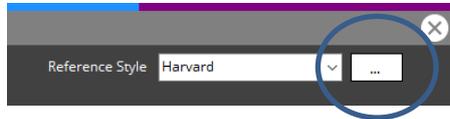
Then click 'Add CSL' (Citation Style Language). This will open a list of pre-set styles for you to choose from. You can search in the top search field to access more styles.

*Please note - you will need to select the new style and click 'Default' to default this reference style.*

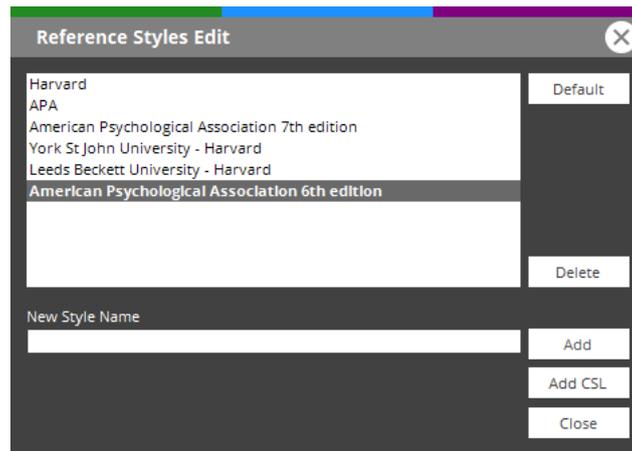


## CUSTOMISE REFERENCE STYLES

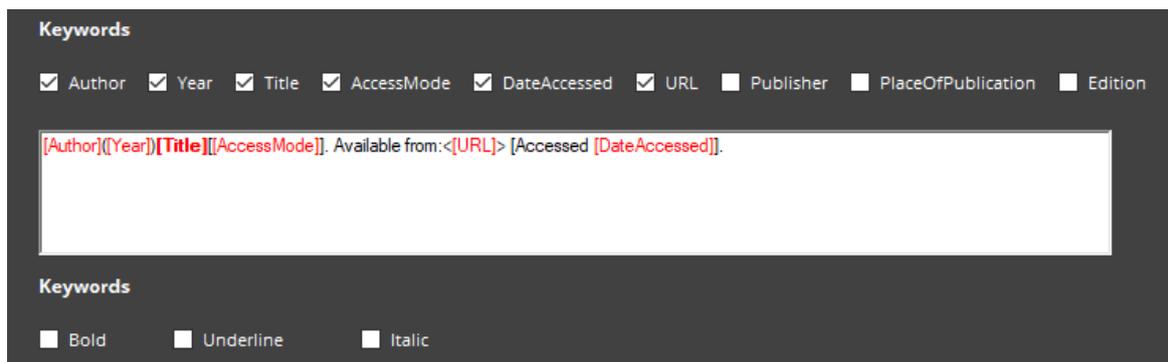
To completely set-up your own reference styles in the reference options, click the three dots in the top right-hand corner next to the Reference Style in Reference Options.



This will open the 'Reference Styles Editor' Window.



- Give the new style a name and click Add.
- Close the Reference Styles Editor.
- You can select or un-select what bits of information you want in the referencing for each source e.g. you could un-select the 'Author' in Web Page.
- To change the order of the referencing click where you want the information to be and then select the box of what you want e.g. Un-select the 'Year', click in the middle of the sentence e.g. after 'Date Accessed' and re-select 'Year', this will then put the 'Year' in the middle of your referencing line.



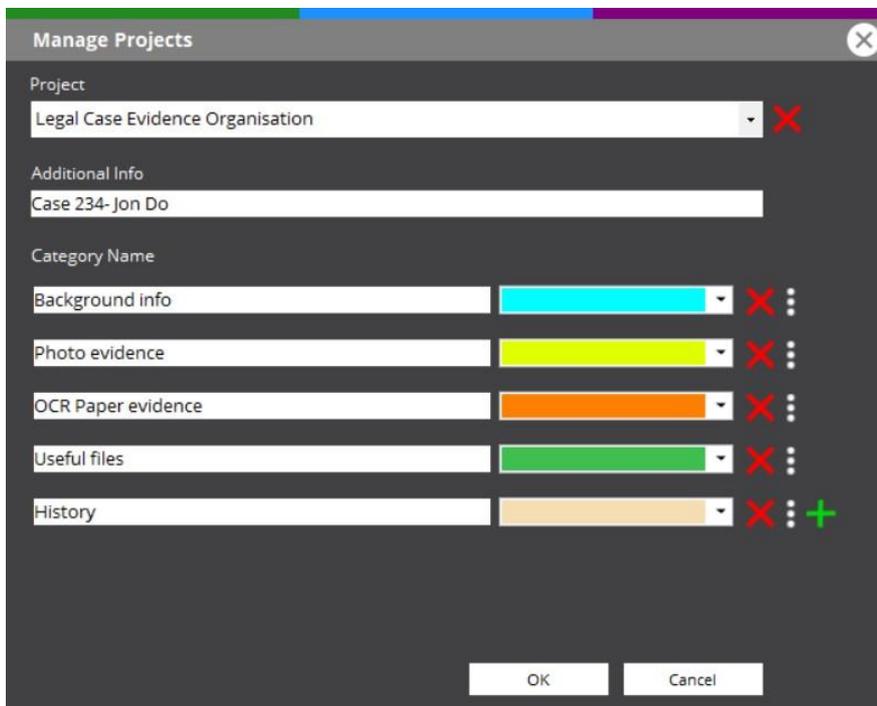
- If you need part of the information to be in e.g. Bold, highlight the required part and select the 'Bold' option.
- If you need to add your own information simply click in the referencing line where you would like this to appear and type it in.

## MANAGE PROJECTS

In the manage window you will be able to manage your projects, add new projects, change the names of categories, add new categories, delete categories, re-order categories, backup your projects, restore your projects, view your bookmarks, change the colour on the colour overlay and change your reference options.



- To manage a project, click on Manage and then click on Manage Projects on the main toolbar.
- You can change the name of the Project, the additional information and the name of the categories.
- You can use the 3 dots on the side of the category to move the categories and re-order them.
- You are able to delete a whole project or individual categories, click on the  to do this.
- You can also increase the number of categories you have by clicking the  button.



| Category Name      | Color      | Delete | Menu |
|--------------------|------------|--------|------|
| Background info    | Cyan       | X      | ⋮    |
| Photo evidence     | Yellow     | X      | ⋮    |
| OCR Paper evidence | Orange     | X      | ⋮    |
| Useful files       | Green      | X      | ⋮    |
| History            | Light Blue | X      | ⋮ +  |

## BACKUP AND SHARING PROJECTS

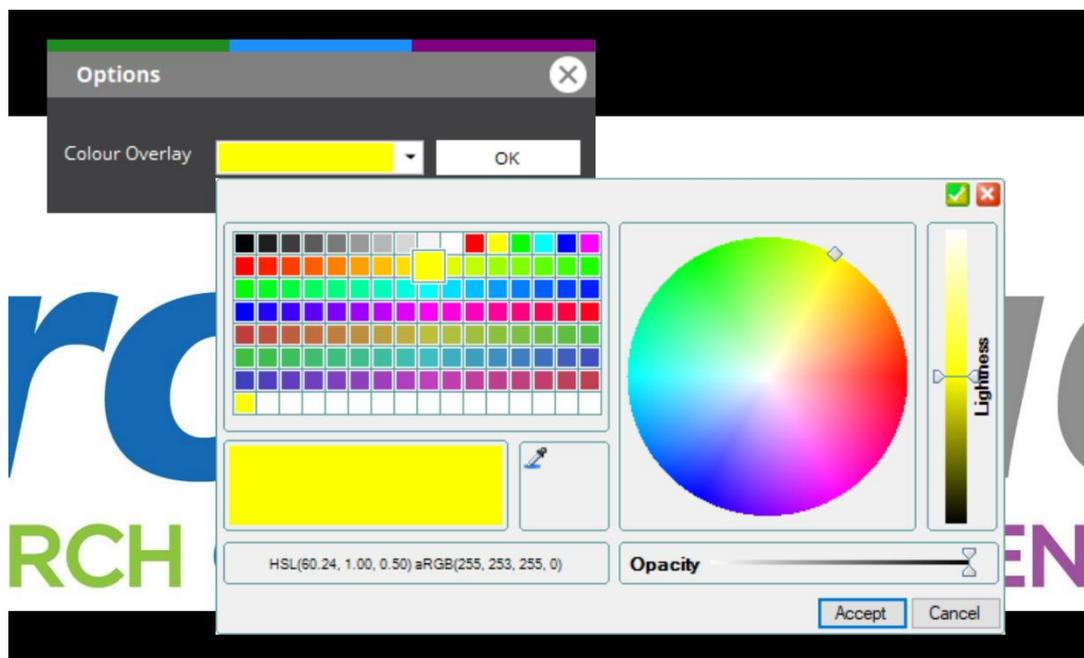
- It is important to backup your projects in-case your computer fails and loses it memory.
- You can also use this tool to share your projects with other Pro-Workspace users.
- To do this simply click on Manage and then click on Backup and choose a place to save your projects. We recommend saving the Backup file on an external source or online cloud e.g. an USB memory stick or Google Drive.

## RESTORE

- You can restore backed up projects using the restore tool.
- To do this click on Manage and then click on Restore, it will then ask you “Do you want an automatic backup on restoring the database”. You can then find and select the backup file and the projects will be restored - *please note this can take a while depending on how much information needs to be restored.*

## COLOUR OVERLAY

- If you click on the Colour Overlay tool on the main tool bar a colour overlay will be placed over the screen.
- You can choose what colour this overlay is by clicking on Manage and then clicking Colour Overlay. In this window you will have the option to change the colour of the overlay.



## SYNCING

Pro-Workspace can sync with Project Assist by uploading all your projects to the Cloud.

## REGISTRATION – MAKING A PRO-WORKSPACE ACCOUNT

If you haven't already done so you will need to make a Pro-Workspace account to allow Pro-Workspace on the computer to sync all your projects with the Project Assist App.

- Please go to the 'Portal' section of the Pro-Workspace website and fill out the form. **You will need your licence key for this.**

## AUTOMATIC SYNCING

Pro-Workspace will automatically sync every minute when it detects a change has been made. Please note you must be signed in.

## MANUAL SYNCING

Go to the 'Manage' on the main toolbar and click on 'Sync'



Once you are in the Sync window click on the 'Perform Sync' button and Pro-Workspace will sync all your projects with Project Assist and store them securely on the Cloud.

