

# User Guide

BlackBerry Workspaces Web Application

Version 5.4





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# About the BlackBerry Workspaces Web Application

The BlackBerry Workspaces Web Application enables you to securely share your files with others, while maintaining full control over who accesses them and how they can work with them. You can store files in workspace folders and collaborate with others, or you can send them securely by email to others, using the Workspaces mail server. Using Workspaces also enables you to continue to manage and maintain control of your files after they are received.

You can also search your folders using powerful search capabilities to quickly locate, sort, and filter files.

With the Workspaces Web Application, control who can access your files by defining groups and including users in these groups. For each group, set specific access conditions (for example, the ability to copy or print a file), and then assign groups to each file, according to the permissions you want to grant. Change these assignments at any time, with immediate effect.

Workspaces is supported on the following platforms:

- Outlook Plug-In
- Mobile platforms:
  - iOS
  - Android
  - BlackBerry 10
- Windows Desktop Application
- Mac Desktop Application
- Web application

# Getting started

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This section describes how to sign in to the Workspaces Web Application, and introduces the user interface.

## Sign in to Workspaces

1. In your browser, enter the URL for the Workspaces Web Application.

**Note:** For many users this is [www.watchdox.com/ngdox](http://www.watchdox.com/ngdox). (watchdox.com is the cloud service URL.) If your organization uses a virtual appliance to host the Workspaces service or your organization has its own dedicated sub-domain on the Workspaces cloud, the URL will be different (for example, [www.company.watchdox.com/ngdox](http://www.company.watchdox.com/ngdox)).

2. Enter your email address and click **Sign in**.  
The authentication method for your organization is determined.

**After you finish:** Refer to the following sections for instructions on how to complete the sign in process:

- If your organization is configured for sign in by email, sign in using your email address. Go to [Sign in using your email address](#).
- If your organization is configured for sign in by username and password, sign in using your username and password. Go to [Sign in with username and password](#).
- If your organization is configured for any other authentication method, follow the steps on screen to sign in.

## Sign in using your email address

**Before you begin:** Perform the steps outlined in [Sign in to Workspaces](#). If your organization is configured for sign in by email, you will see a sign-in screen with the **Email** field.

1. Enter your email address and click **Sign in**.  
An email is sent to the email address supplied.
2. Open this email in your regular email, copy the verification code, and return to the sign-in screen.
3. Enter the verification code.  
You are signed in, and the main screen of the Workspaces Web Application appears.

## Sign in with username and password

**Before you begin:** Perform the steps outlined in [Sign in to Workspaces](#). If your organization is configured for sign in by username and password, you will see a sign-in screen with **Email** and **Password** fields.

1. If you are an existing user, enter your email address and password.
2. Click **Sign in**.
3. If you are a new user, complete the following steps:
  - a. Click **Create account**.
  - b. Enter the required information and click **Create account**

You are signed in, and the main screen of the Workspaces Web Application appears.

## Sign out of Workspaces

Hover over  and click **Sign out**.

You are signed out.

## Sign out of Workspaces on all devices

1. Hover over  and click **Account Settings**.
2. Click **Sign out of all devices**.

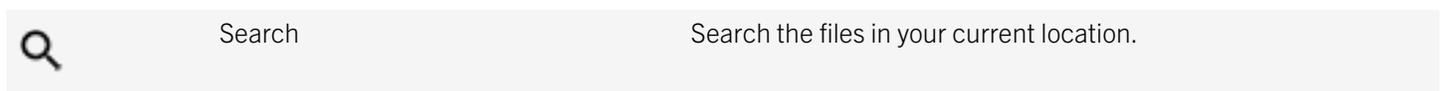
You are signed out of Workspaces on all devices on which you are signed in to your Workspaces account.

# Introducing the Workspaces interface

The Workspaces Web Application user interface (UI) is divided into six main functional areas to make accessing, managing and working with your content as easy as possible. The Workspaces main screen opens with your content list displayed in the content area, the navigation pane displayed to the left and the function action button available at the bottom right of the content area of the screen. The main components of the Workspaces Web Application interface are described here.

### Top bar

Use the top bar to access the following functions:



	Notifications	Access your file and workspace or folder permission requests.
	Admin Console	Access the Workspaces administration console.
	Account	Manage your user account or sign out of Workspaces
	Quick Send	Select and send an external file via Workspaces

## Location bar

The location bar provides your current location at all times within the application and the search feature to search for workspaces.

## Action bar

Use the action bar to perform actions on your workspaces, folders, and files, such as upload files, create new workspaces and folders, download files, send files and delete. The action bar options change dynamically depending on your actions and selections.

## Navigation pane

The navigation pane includes direct navigation to all workspaces and external repositories you have access to as well as your Received files, Sent items lists, and Help resources.

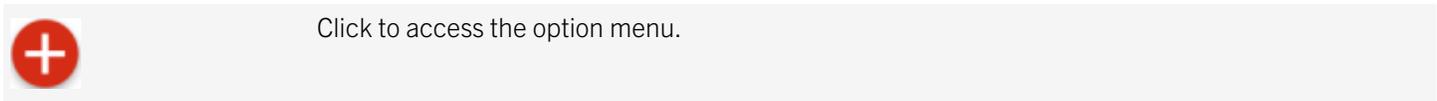
**Tip:** Click  to extend and  to reduce the right pane.

## Function Action Button (FAB)

In the content area, the Function Action Button or FAB is used to:

- Create workspaces
- Create workspaces
- Send new external files.
- Enable contextual creation of new files, create new folders, allow file uploads and sharing of your current location.

The FAB "floats" and can be moved around a predefined space at the bottom right of each screen it appears on by selecting the button and dragging it to the desired location.





Click to close the option menu.

## Search for workspaces

1. Click  to access your workspaces, and then click .
2. Do one of the following:
  - In the **Search workspaces** box, start typing the name of the workspace that you want to locate. The list is filtered to show only the workspaces that match the text you entered.
  - Browse the list of workspaces until you locate the workspace you are looking for.

**Tip:** To select a folder in the workspace, click  and select the desired folder.

3. Select the desired workspace.  
The workspace opens in the left pane.

## Search for files

Search for any file in your current location.

1. On the top toolbar, click in the **Search files in current location** box and type the search string text.  
The text can be part of the file name or text inside the file.
2. Click  to start the search.  
The search results appear in the content area.

## Sort items

Sort the items listed in the content area.

1. In the action bar, click **Sort** and select one of the following options:
  - **Sort by name:** sort the list alphabetically.
  - **Sort by creation date (workspaces):** sort the list by date.
  - **Sort by date modified (files):** sort the list by date.
  - **Sort by file size:** sort the list by file size. (Only relevant when item contain files)
2. Select the desired sort option a second time to toggle the order.

# Manage your account

Change your username, web application language, and set your file activity email setting.

1. Click  and select **Account settings**.
2. In the **Name** box, type the name you want to use for your account. The name you set here is used when you share documents, request access to files, and so on.  
By default, your name is your email address.
3. In the **Language** field, select the desired language.
4. Select **Send me a daily activity report for my files** to receive a daily report on file activity for workspaces you own.
5. Click **Save**.  
Your changes are saved.

# Change your password

If your organization is configured for username and password authentication, change your account password.

1. Click  and select **Account settings**.
2. Click **Change password**.
3. In the **Old password** box, enter your current password.
4. In the **New password** box, enter your new password.
5. In the **Confirm password** box, re-enter your new password.
6. Click **Change**.  
Your changes are saved.

# Change your secret question

If your organization is configured for username and password authentication, change the question you are asked in order to authenticate your user credentials in the event that you forget your password.

1. Click  and select **Account settings**.
2. Click **Change secret question**.
3. In the **Enter password** box, enter your current password.

4. In the **New secret question** box, enter your new question.
5. In the **New answer** box, enter your new answer.
6. Click **Change**.  
Your changes are saved.

## Access the Workspaces administration console

If you are an organization administrator, you can access the Workspaces administration console to manage your organization's Workspaces settings.

Click  then select **Admin Console**.

**After you finish:** For more details on managing Workspaces as an organization administrator refer to the WorkspacesServer Administration Guide.

## Get help

Take a tour that introduces the Workspaces Web Application or access online Support.

Click  and select Help, **Support**, or **Take the tour**.

# Sending and receiving files

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From the top bar, **Quick send** can be used to send files outside of Workspaces. In the content area, use the Floating Action Button or screen prompts to send files from within your Workspaces. In the Workspaces navigation pane, view, access, and manage your Received files and Sent items.

## Send files

Protect and send files from your computer. Recipients receive a link to the file that they can access via Workspaces.

1. Do one of the following:

- Click **Quick send** to send an file not currently within your workspace.
- In the action bar, click **Send new file** to send a file not currently in your workspace.
- Click  and select **Send new file**.

2. Locate and select the file(s) that you want to send, and click **Open**.

**Note:** Access to some file types cannot be controlled. If your file is marked with **File will be uploaded with 'Full access' permissions**, anyone who can access the file can do so with "Full access" permissions. For more information on this feature, see [About collaboration](#).

3. Click **Settings** to set access permissions and enable collaboration if desired.

4. If the **Require recipients to sign in** check box displays, do one of the following:

- To ensure that recipients sign in to access the file, select the **Require recipients to sign in** check box.
- To allow recipients to access the file without signing in, clear the **Require recipients to sign in** check box.

**Note:** For more information on this feature, see [About requiring recipient sign in](#).

5. If you selected **Require recipients to sign in**, perform the following steps:

- a. To enable your recipients to upload new versions of the file, select **Enable collaboration**.
- b. If required, in the **Permission** list, edit the permission for the selected file.  
For more information, see [About permissions](#)
- c. In the **File expiration** list, set the time when the file will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.

If you select **Specific date**, click  and select the date in the calendar.

- d. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.
  - e. In the **Allow access to** list, select who can access the file (**Recipients only**, anyone in the **Anyone within recipients' domain**, or **Everyone**).
6. Click **Done** to return to the message.
  7. Enter the name, email address, or distribution list for each recipient, and then press ENTER.
  8. If desired, change the subject of the notification email.
  9. If desired, add a personal message.
  10. To send additional files when sending with the Quick send feature, click **Add files** and repeat step 2, or drag a file onto the pop-up window.
  11. Click **Send**.  
Your file(s) are sent. You can access your files from your Sent items list. For more information, see [Viewing sent items](#). The recipient receives an email message with a link to the file; click the link to open the file.

## Send a copy of a file

Send a copy of a file to send a link to a file in your workspaces. Recipients receive a link to access the file. Each time you send a copy, the action creates a new instance of the file.

For sent files, use **Send a copy** to send a new instance of the file. This is useful for when you want to collaborate on a file independently of the original recipients. For more information, see [About collaboration](#).

To share the same instance of a sent copy with new recipients, add new recipients to the file, see [Add recipients to a sent file](#).

**Note:** You must be assigned the "Exchange sender" role to be able to send copies of files. For more information, contact your organization Workspaces administrator.

1. From the navigation pane, select **Sent items**.
2. Select the file you want to send a copy of.
3. In the action toolbar, click **Send a copy**.
4. To set the file permissions, expiration, watermark settings, to include annotations, and enable collaboration if desired, click **Settings**.
5. If you want to share your annotations with the file, select **Include annotations**.
6. If the **Require recipients to sign in** check box displays, do one of the following:
  - To ensure that recipients sign in to access the file, select the **Require recipients to sign in** check box.
  - To allow recipients to access the file without signing in, clear the **Require recipients to sign in** check box.

**Note:** For more information on this feature, see [About requiring recipient sign in](#).

7. If you selected **Require recipients to sign in**, perform the following steps:
  - a. To enable your recipients to upload new versions of the file, select **Enable collaboration**.
  - b. If required, in the **Permission** list, edit the permission for the selected file.  
For more information, see [About permissions](#)
  - c. In the **File expiration** list, set the time when the file will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.

If you select **Specific date**, click  and select the date in the calendar.

- d. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.

**Note:** Watermarks are not displayed on workspace Office files, even when PDFs are set to display them.

- a. In the **Allow access to** list, select who can access the file (**Recipients only**, anyone in the **Anyone within recipients' domain**, or **Everyone**).
8. Click **Done** to return to the message.
9. Enter the name, email address, or distribution list for each recipient, and then press ENTER.
10. If desired, change the subject of the notification email.
11. To add a personal message, add your message in the **Add a personal message** box.
12. Click **Send**.  
Your file(s) are sent, and can be accessed by you on the Sent items page. The recipient receives an email message with a link to the file.

## View and manage sent items

Access the Sent items list to view your sent items, download, share with additional members, share a copy or delete them. You can also view file information, permissions, and track your files for each sent file. From the navigation pane, click **Sent items** to access your Sent items list.

- For more information on viewing the file, see [View files in the online viewer](#).
- For more information on downloading a sent file, see [Download files](#).
- For more information on adding recipients to a sent file, see [Add recipients to a sent file](#).
- For more information on deleting a sent file, see [Delete a folder or file](#).
- For more information on uploading a new version of a sent file, see [Upload a new version of a file](#).
- For more information on managing file permissions for a sent file, see [Managing file permissions](#).
- For more information viewing the tracking map, see [View the tracking map](#).

- For more information viewing the file activity log, see [View a file activity log](#).

## Add recipients to a sent file

Adding recipients to a sent file is a way to share the files with additional people in addition to your existing recipients. This action is useful when you want to add new members to an existing collaboration group on a specific item.

1. From the navigation pane, click **Sent items**.
2. From the content area, select the file you want to forward in the sent items list.
3. In the action toolbar, click **Add recipients**.
4. Enter the name, email address, or distribution list for each recipient, and then press ENTER.
5. To set the file permissions, expiration, watermark settings and to include annotations, click **Settings**.
6. If you want to share your annotations with the file, select **Include annotations**.
7. In the **Permission** list, edit the permission for the selected file, as desired: For more information see [About permissions](#).
8. In the **File expiration** list, set the time when the file will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.

If you select **Specific date**, click  and choose the desired date from the calendar.

9. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.
 

**Note:** Watermarks are not displayed on workspace Office files, even when PDFs are set to display them.
10. In the **Allow access to** list, select who can access the file (**Recipients only**, anyone in the **Anyone within recipients' domain**, or **Everyone**).
11. If desired, change the subject of the notification email.
12. To add a personal message, add your message in the **Add a personal message** box.
13. Click **Send**.  
Your file(s) are sent, and can be accessed by you on the Sent items page. The recipient receives an email message with a link to the file.

## Manage access to a sent file

Follow these steps to modify or revoke user access to a file located in your Sent items.

1. From the navigation pane, select Sent items and then from the content area, select the file for which you want to modify permissions.

2. Access the file's **Permissions** tab in the management pane.  
The **Permissions** tab displays a list of users and permitted groups.
3. Click **All recipients**.
4. Select the recipient(s) you want to modify permissions for, and click  > **Edit** or **Revoke access**.
5. Update the permissions as desired.
6. Click **Apply**.

## Revoke access to sent files

You can revoke access to sent items at any time.

1. In the Sent items page, select the file that you want to revoke access to.
2. In the **Permissions** tab, select the recipient that you want to revoke access for.
3. Do one of the following:
  - In the **Permissions** tab, click .
  - Next to the recipient, click  and select **Revoke access**.
4. In the confirmation message, click **OK**.  
The recipient can no longer access the file. To restore access, edit access as described in [Manage access to a sent file](#).

## Manage collaboration

Manage sent items to upload a new version, and to allow or block recipients from uploading new versions.

For more information, see [About collaboration](#).

1. From the navigation pane, click **Sent items**.
2. Select the file you want to manage.
3. To upload a new version of a sent file, next to the file, click  > **Upload new version**, and follow the on-screen instructions.
4. To allow recipients to upload new versions of the selected file, click  and select **Enable collaboration**.
5. To block recipients from uploading new versions of the selected file, click  and select **Turn off collaboration**.

# Access received files

From the navigation pane, select **Received Files** to access your Received files list.

**After you finish:**

- For more information on viewing a received file, see [View files in the online viewer](#).
- For more information on downloading with full access or protected, see [Download files](#).
- For more information on sending a copy, see [Send a copy of a file](#).
- For more information on hiding a received file, [Working with hidden files and the recycle bin](#).

# Managing workspaces

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Each workspace in the interface is labeled with one of with the following icons to show your workspace role.

-  Signifies that the workspace is your personal workspace. For more information, see [About My Workspace](#)
-  Signifies that you are a workspace administrator. Workspace administrators have full control over the workspace and its folders and files. As an administrator, you can also manage workspace groups and users.
-  Signifies that you are a contributor to the workspace. As a workspace contributor, you can manage folders and files within the workspace, and upload new files.
-  Signifies that you are a visitor to the workspace. As a workspace visitor, you can access the workspace according to your permissions. As a visitor, you cannot upload files to the workspace.

Workspace owners and administrators can manage workspaces, their folders and files, and access permissions. For more information on roles and permissions, see [User roles and sharing permissions](#).

## Access workspaces

If your organization is configured to work with SharePoint, Windows Files Share, or CMIS, you can access these shared workspaces directly from the web application.

From the navigation pane, select from the options you have access to such as Workspaces, SharePoint, Windows Files Share, or other configured CMIS external repositories.

The workspaces are displayed in the content area.

## About My Workspace

If you have a "workspace owner" role in your organization, you are assigned a personal workspace named **My Workspace** when you first open the Workspaces Web Application.

Your **My Workspace** personal workspace is especially useful when working with Workspaces for Windows and Workspaces app for Mac to move folders and files into Workspaces, as they are placed in your personal workspace unless otherwise specified, and then are synced with Workspaces on your mobile devices and on the web.

For more information, refer to the Workspaces for Windows or Workspaces app for Mac User Guides.

## Create new workspaces

1. In the action bar, click **New workspace** or click  and select **New workspace**.
2. In the **Workspace name** box, enter a name for the workspace.
3. In the **Workspace description** box, enter a description (optional).
4. In the **Administrator workspace** box, enter the email address of a user you want to make an administrator of this workspace, and press return.
5. Repeat step 4 for all users that you want to add as administrators
6. Click **Add**.

A confirmation message confirms the operation, and the new workspace appears in the list.

7. In the confirmation message, click **Open** to open the workspace or **Upload Now** to start uploading files to the new workspace.

You are added as an administrator by default. Administrators can add additional users to the workspace and set general access permissions.

## Create transient workspaces

This procedure describes how to create a new workspace in the Unified Content Connector repository via the Workspaces Web Application. This action is available for users with the **Workspace owner** role.

1. Sign in to the Workspaces Web Application.
2. Access the Unified Content Connector repository
3. In the action bar, click **New workspace** or click  and select **New workspace**.
4. In the **Workspace name** box, enter a name for the workspace.
5. In the **Workspace description (optional)** box, enter a description if desired.
6. In the **Path** box, enter the repository path.

The path value determines the root level of the repository. It must begin with the same **Allowed path** as set by the Organization Administrator when the connector was configured.

For example: Where the Organization Administrator set the allowed path to `\\fileshare\`, the following paths are valid:

- `\\fileshare\`
- `\\fileshare\folderA\folderB`

7. In the **User name** and **Password** boxes, enter your access credentials for the external repository.

8. Click **Add**.

## Share workspaces

Sharing a workspace is one way to invite new members to the workspace. You can also add groups, email domains and individuals by managing workspace permissions.

1. In the content area, do one of the following:
  - Click  next to the workspace that you want to share, and select **Share**.
  - Click the workspace to select it, and then click **Share workspace** in the actions bar.
  - Hover over the workspace name and click **Share**.
  - Click the workspace name to access it, and then click **Share workspace** in the actions bar.
2. In the **Add members** box, enter the email addresses of users you want to share the workspace with.
3. In the **Message** box, enter a message (optional).
4. In the **Role** list, select the role that you want to assign to the members you are adding. For more information, see [About roles](#).
 

**Note:** The default permissions for contributors and visitors are set and can be changed by your organization administrator. For more information, contact your organization administrator.
5. In the **Permission** list, select the user access rights for the workspace. For more information see [About permissions](#).
6. In the **File expiration** list, set the time when the file will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.
 

If you select **Specific date**, click  and choose the desired date from the calendar.
7. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.
 

**Note:** Watermarks are not currently displayed on workspace Office files, even when PDFs are set to display them.
8. Click **Share**.  
A confirmation message confirms the operation.

## Manage workspace permissions

The **Permissions** tab is displayed for a selected workspace, folder, or file, when you are an administrator in the workspace. For more information on managing access, see [Managing access](#).

Filter the display of the **Permissions** tab in the following ways:

- Choose to display permitted entities only or all defined entities in the **Permissions** tab (including those with no access) by selecting **Show permitted only** or **Show all**.
- To sort the list alphabetically, toggle the **Sort** arrow. Note that the Administrators group always appears at the top of the list.
- Filter the displayed list by choosing one or more assigned organization roles and entity types available in the filter



## Rename workspaces

1. In the content area, locate the workspace that you want to rename.

**Note:** You cannot rename **My workspace**.

2. Hover over the item, and select **Rename**.
3. Click in the name box, and edit the workspace name as desired.
4. Do one of the following:

- To confirm, click  .
- To cancel, click  .

A confirmation message confirms the operation, and the renamed workspace appears in the list.

## Edit the workspace description

Workspace administrators can add or edit the workspace description at any time.

1. In the content area, click the workspace name to access it.
2. In the management pane, do one of the following:
  - To add a description, click **Add** next to **No description**.
  - To edit an existing description, click the current description next to **Description**.

3. Enter the desired text, and click  .

# Delete workspaces

1. In the content area locate and select the workspace that you want to delete.
2. In the action toolbar, click **Delete**.  
**Note:** You cannot delete **My workspace**.  
A confirmation message confirms the workspace is deleted.
3. If necessary, click **Undo** to restore the workspace.

**After you finish:** To restore a deleted workspace, contact your Workspaces administrator.

# View workspace information

Access the management pane to view workspace information, including a list of your capabilities in the workspace.

1. In the content area, click the workspace.  
The **Workspace info** tab is displayed in the management pane on the right.
2. Click  to copy a link to the workspace to share with others.  
The link is copied to your clipboard.
3. Paste and send the link as desired.

# Managing folders

Use folders to manage the files within your workspaces. If necessary, you can set unique roles and permissions for each folder.

**Note:** When working with folders or subfolders with broken inheritance, all permitted actions are available based on your role in the parent folder or workspace.

For more information on roles and permissions, see [About user roles, sharing, collaboration and permissions](#).

## Create new folders

Create folders in workspaces to manage your files.

1. Click a workspace name in the content area to access that workspace.
2. Click **New folder** in the action bar or click  and select **New folder**.
3. Enter the **Folder name**.
4. If you want to set the permissions this folder:
  - a. Select **Set permissions**.
 

**Note:** If you do not select **Set permissions**, this folder will inherit the permissions of the parent folder or workspace. You can edit the permissions after the folder has been created. For more information, see [Manage folder permissions](#).
  - b. Click **Set permissions**.
  - c. Click **Accept**.
  - d. Type in or select the group(s) that you want to give access to this folder, and assign the permissions of your choice.
5. Click **Create folder**.  
A confirmation message confirms the operation. The new folder appears in the workspace. Groups that have access to the parent workspace/folder will also have access to the new folder.

## Share folders

Sharing a folder is one way to invite new members to the folder. You can also add groups, email domains and individuals by managing folder permissions.

1. Click the folder to select it, and then click **Share folder** in the action bar.

2. In the **Add members** box, enter the email addresses of users you want to share the folder with.
3. In the **Message** box, enter a message (optional).
4. In the **Role** list, select the role that you want to assign to the members you are adding. For more information, see [About roles](#).

**Note:** The default permissions for contributors and visitors are set and can be changed by your organization administrator. For more information, contact your organization administrator.

5. In the **Permission** list, select the user access rights for the folder. For more information see [About permissions](#).
6. In the **File expiration** list, set the time when the folder will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.

If you select **Specific date**, click  and choose the desired date from the calendar.

7. In the **Watermark** list, set whether folder PDF files are displayed with a watermark.
8. Click **Share**.  
A confirmation message confirms the folder was shared.

## Manage folder permissions

The **Permissions** tab is displayed in the management pane for a selected workspace, folder, or file, when you are an administrator in the workspace. For more information, see [Managing access](#).

## Download a folder

The download a folder function is used to download all of the files and sub-folders it contains to your computer. Depending on your user permissions, choose **Full access** to download the original version of the files, or **Protected** to download a tracked version of the files. If you choose **Protected**, you can view, edit, print, and copy the files according to your user permissions.

1. Within a workspace in the content area, locate the folder you want to download.
2. Do one of the following:
  - Hover over the folder that you want to download, and select **Download**. The folder and its contents are downloaded with the highest level of permissions you have based on your role in this folder.
  - Select the folder from the folder list, in the action bar select **Download** > and choose **Full access** or **Protected** from the drop down menu.
  - From the folder entry, click  > and choose **Download - Full access** or **Download - Protected**.

The folder is zipped and downloaded to your computer. If you chose to download a full access copy of the folder, an unprotected copy is downloaded. If you chose to download a protected copy, a protected copy is downloaded; your ability to view, edit, print or copy the content is determined by your user permissions for the folder.

## Rename a folder

1. In the content area, locate the item that you want to rename.
2. Hover over the item, and select **Rename**.
3. Click in the name box, and edit the name as desired.
4. Do one of the following

- To confirm, click .
- To cancel, click .

A confirmation message confirms the item was renamed.

## Move a folder or file

Move folders and files to other folders in the workspace, or to the workspace itself. You can move one or a number of items at once. When moving folders, its sub-folders and files are also moved.

1. In the content area, locate the item(s) that you want to move.
2. Select the item(s), and then click **Move**.
3. Select the folder in the content list that you want to move the folder(s) to, and then click **Move**.  
The item(s) are moved to the selected destination.

## Delete a folder or file

1. In the content area, locate the item(s) that you want to delete.
2. Check the item(s), and select **Delete** in the action bar or click  and select **Delete**.  
The item(s) are moved to the Recycle bin and if necessary, can be restored later by a Workspaces administrator.

# View folder information

Access the **Folder info** and **Permissions** tabs in the management pane to view folder information, including the list of your capabilities (such as upload, move, share etc.) in the selected folder.

1. In the content area, select the folder from the content list.  
The **Folder info** and **Permission** tabs are displayed in the management pane.
2. Click  to copy a link to the folder to share with others.  
The link is copied to your clipboard.
3. Paste and send the link as desired.

# Managing files

## 6

Upload files to workspaces and folders, manage file permissions, access previous versions, and annotated versions of your files.

To view your files, open them in the online viewer, or download them to open them in their native application.

## Uploading

Upload files in the following methods:

- Upload a new file: upload files to a workspace
- Upload a new file version: overwrite an existing file with a new version

Maximum file size for upload via the Workspaces Web Application is 10GB.

**Note:** Files of up to 10GB can be uploaded, however, the capability to upload may be limited by your computer's available system resources or by your organization administrator who may have set a sync policy that restricts the type or size of files that you upload. Contact your organization's Workspaces administrator for more details.

## Permissions and supported file types

Supported file types for each group of permission templates:

### Full access

Users can download a copy of the file for full access.

Users can view Office, PDF, and image files through the Workspaces Online Viewer\*\*\* and Workspaces mobile apps.

All file types can be securely transferred with Workspaces.

### Advanced Rights Management

These permission templates enable users to download protected files with rights management controls. Workspaces app for Windows or the Workspaces app for Mac is needed to open the protected files.

Users can also view rights protected files through the Workspaces Online Viewer\*\*\* and the Workspaces mobile apps.

- Supported files: \*.doc, \*.docx, \*.xls, \*.xlsx, \*.ppt, \*.pptx, \*.pps, \*.ppsx, pdf
- Image files: \*.eps, \*.jpg, \*.jpe, \*.jpeg, \*.gif, \*.bmp, \*.png, \*.tif, \*.tiff, \*.psd are also supported, if enabled by your organization.
- All other file types (e.g. \*.avi, \*.mp4, \*.xlsm) are granted with "Full access".

## Online only

These permission templates enforce users to only access protected files through the Workspaces Online Viewer\*\*\*.

Users can also view files through the Workspaces mobile apps.

- Supported files: \*.doc, \*.docx, \*.xls, \*.xlsx, \*.ppt, \*.pptx, \*.pps, \*.ppsx, pdf
- Image files: \*.eps, \*.jpg, \*.jpe, \*.jpeg, \*.gif, \*.bmp, \*.png, \*.tif, \*.tiff, \*.psd are also supported, if enabled by your organization.
- All other file types (e.g. \*.avi, \*.mp4, \*.xslm) are granted with "Full access".

\*\*\* Such files are converted for viewing with the Workspaces Online Viewer. If you are unable to access a file, contact your organization Workspaces administrator.

## Upload files

Upload single or multiple files to a workspace or folder.

1. Browse to the workspace or folder where you want to upload a file.
2. Do one of the following:
  - a. From the quick access button, select **Upload**, and browse to and select the file(s) that you want to upload, and click **Open**.
  - b. Drag the desired file to the desired location.

**Note:** If you upload a file with the same name as an existing file at the location, choose to update the existing file or to keep both files.

Your file(s) are uploaded. When your file(s) have finished uploading, the green check mark appears next to the file name.

3. If you do not wish to notify users that have access to this folder about the uploading files, clear the **Notify group members and users** checkbox.
4. If desired, change the subject of the notification email.
5. To add a personal message to the notification, add your message in the **Add a personal message** box. By default, the permissions of the parent folder are assigned to each file.
6. If you want to change the default access permissions for the uploaded file(s) in the current batch:
  - a. Click **Set permissions**.
  - b. In the list of groups/user names, select the entity(ies) that you want to give access to the file(s) you are currently uploading.
 

**Note:** Entities that are not selected will have no access to the file(s) you are currently uploading, even if they have access to this folder. They will not see the file(s) in the folder.
  - c. Click **Done**.

**Note:** You cannot change permissions at this stage. If necessary, change the permissions after you have finished uploading. For more information, see [Managing access](#).

7. If you want to upload additional files, click **Add files** or drag the desired file to the Upload window.

**Tip:** If you have navigated away from the location you are uploading your files to, click **Go to location** in the Upload window to return to that location.

8. Click **Next**.

**Note:** Access to some file types cannot be controlled. If your file is marked with **File will be uploaded with 'Full access' permissions**, anyone who can access the file can do so with "Full access" permissions.

Your file(s) are secured by Workspaces.

9. Click **Done**.

The file(s) are uploaded. If you elected to send a notification of the uploaded file(s), an email notification is sent to everyone who has access to the folder.

## Upload a new version of a file

Upload new versions of existing files in workspaces or in your Sent items.

1. Browse to the location of the current file.
2. Locate the file that you want to forward.
3. Click  > **Upload new version** next to the file.
4. Locate and select the file(s) that you want to upload, and click **Open**.  
The file is uploaded to Workspaces.
5. To notify users that have access to this document, ensure that **Notify group members and users** is selected.
6. If desired, change the subject of the notification email.
7. If you want to send a personal message with the new version notification, enter your message in the **Add a personal message** box.
8. Click **Next**.
9. Click **Done**.  
The new version replaces the existing file in the workspace. Should you need to roll back to an earlier version, you can do so at any time. See [Restoring a file to an earlier version](#) for more information.

## Download files

Download a folder to download all of its files and sub-folders to your computer. If you are the workspace owner or administrator, or the file owner, you can download the original file (without any access restrictions controlled by Workspaces) or the protected version of it (with access protected by the Workspaces permissions).

**Note:** If you are not the owner or an administrator, and the file permissions do not permit unprotected downloading, you are able to download a protected version only.

1. Locate the file that you want to download.
2. Do one of the following:
  - Hover over the file that you want to download, and then click **Download**. The file is downloaded with the highest level of permissions you have for your role in this folder.
  - Select the file in the content list, and in the action toolbar, click **Download** > and choose **Full Access** or **Protected**.
  - Locate the file and click  > and choose **Download - Full Access** or **Download - Protected**.

The file is downloaded to your computer. If you chose to download a "Full access" copy of the file, an unprotected copy is downloaded, and your actions on the file are not traced by Workspaces. If you chose to download a "protected" copy, your ability to view, edit, print or copy the content is determined by your user permissions for the file.

## Managing file permissions

The **Permissions** tab is displayed in the management pane for a selected workspace, folder, or file, when you have administrator rights on the item. For more information on managing access, see [Managing access](#).

## Locking files

Lock a file to prevent other users from uploading a new version for 24 hours. This feature is enabled by organizational policy.

### Lock a File

- Do one of the following:
  - In the content area, next to the file you want to lock, tap , and select **Lock**.

- When viewing an Office file in the Workspaces Editor, click  to lock the file. For more information on editing Office files in the Workspaces Editor, see [Edit a file online](#).

The file is locked for 24 hours, and during that time can only be unlocked by yourself or a workspace administrator. After that time, the lock is automatically removed.

## Unlock a file

In the content area, locked files are marked , and in the Workspaces Editor are marked , and can be unlocked at any time by the user who locked them, or by the organization Workspaces administrator. By default, files lock for 24 hours and are released automatically after that.

Do one of the following:

- In the content area, next to the file you want to unlock, tap  > and select **Unlock**.
- When editing a locked Office file in the Workspaces Editor, click  to unlock the file for others. For more information on editing Office files in the Workspaces Editor, see [Edit a file online](#).

The file is unlocked.

## Edit a file online

Office files can be edited online within the Workspaces web application where you have permission to do so.

**Tip:** Click  when viewing an Office online to edit the document in the online editor.

1. In the content area, locate the Office file that you want to edit.
2. Next to the file, click  > **Edit**.  
The file opens in the online viewer.
3. Edit and save your file as desired.

## View files in the online viewer

Use the online viewer to view Office and PDF files.

1. In the content area, select the file that you want to view.

2. Do one of the following:

- Hover over the file and click **View**.
- Click  > **View**.

The file opens in the online viewer.

3. Select the file in the content list:

- If you have the necessary permissions, click  and select **Full Accessor Protected** to download the file.
- If you have the necessary permissions, click  to print the file.
- If you have the necessary permissions, click  to send a copy of the file or share your annotations (this feature is based on your permissions).
- Click  to view the file at actual size.
- Click  to view the file at full view.
- Click  to fit the file to the width of the viewer.
- Click  or  to rotate the file clockwise or counterclockwise.
- Click  to zoom in.
- Click  to zoom out.
- Click   to select the desired magnification
- Click in the box and enter the desired page number  /  to go to a particular page.
- Click  to open the page thumbnails panel.
- Click  to create an annotation.
- Click  to search for text within the file. Use the arrows to page through the results. Click  again to close the search box.
- If you have the necessary permissions, click  to edit the file. The file opens in the online editor. Note, your organization must subscribe to this service.
- Click  to go to the file location. This option only appears when you are in Full view mode.

- Click  to view your permissions for the file.
- Click  to maximize the viewer.
- Click  to close the viewer.

## Working with annotations

Within Workspaces, files can be annotated and edited in the file viewer. Files with annotations are marked  in the content area. Annotations can be shared with others, but annotations can only be edited by their creator.

### Use the free draw tool

1. Click  to open the annotation menu.
2. Click the down arrow next to the marker tool , and do one of the following:
  - To change the color, select the desired color.
  - To change the marker tip size, select the desired thickness.
  - To change the transparency of the marker, select the desired transparency.

The tool changes according to your selection. To change another attribute, repeat this step.

3. Draw on the file as desired.  
The annotation is saved automatically.
4. To change the color, thickness, or transparency of the line after drawing, select the drawing and repeat step 2, changing the attributes as desired.
5. To move the drawing, drag it to the desired location.
6. To delete the drawing, select and delete it within the editor, or from the annotation management pane, click  > **Delete**.

### Highlight text

1. Click  to open the annotation menu.
2. Click the down arrow next to , and choose the highlighter color.
3. Highlight the desired text.  
The annotation is saved automatically.

4. To change the color of the highlighted text, select the highlight and repeat step 2.
5. To delete the highlight, select and delete it within the editor, or from the annotation management pane, click  > **Delete**.

## Add a sticky note

1. Click  to open the annotation menu.
2. Click the arrow next to , and choose the color of the sticky note.
3. Click the location where you want to add the sticky note, and enter your comments. The annotation is saved automatically.
4. To change the color of the sticky note, select the note and repeat step 2.
5. To edit the note, select it and click  > **Edit**, and make the necessary changes.
6. To move the note, drag it to the desired location.
7. To remove the note, select it and click  > **Delete** from within the editor or from the annotation management pane.

## Search and filter annotations

Use the annotations pane to view all annotations in a file. Search and filter the annotations list to locate a particular annotation.

**Tip:** Click  to reduce and click  to restore the **Annotations** pane.

1. To search for the comments by a particular reviewer or text contained in a sticky note comment, in the **Search** box in the **Annotations** pane, start typing the desired string. The list is filtered according to the matching results.
2. To filter the list by annotation type:
  - a. Click  and make sure that **Types** is selected.
  - b. Select or clear the desired annotation type(s). The display is updated dynamically.
  - c. Click **Clear** to clear the filters.
3. To filter the list by reviewer :
  - a. Click  and make sure that **Users** is selected.
  - b. Select or clear the desired reviewer(s). The display is updated dynamically.
  - c. Click **Clear** to clear the filters.

## Download annotations

Download the file as a PDF including all or selected annotations by author.

1. In the content area, locate the desired file.
2. Click  and select the annotations of the reviewer that you want to include in the downloaded file.
3. Click **Download**.  
The file with annotations of the reviewers you selected is downloaded as a PDF file.

## Share annotations

Share annotations that you've made on a file.

1. From the content area, navigate to the annotated file that you want to share.
2. Do one of the following
  - To share the file from the workspace:
    1. Click the  next to the file.
    2. Select **Me** and then click **Share**.
  - To share the file from the online viewer:
    1. Open the file in the online viewer.
    2. Click  and then click **Share annotations**.
3. Enter the name, email address, or distribution list for each recipient, and then press ENTER.  
**Tip:** To share your annotations with everyone who has access to the file, click **Add all permitted members**.
4. If desired, change the subject of the notification email.
5. To add a personal message, add your message in the **Add a personal message** box.
6. Click **Send**.  
Your file(s) are sent. You can access your files on the Sent items page. For more information, see [Viewing sent items](#). The recipient receives an email message with a link to the file; they click the link to open the file.

# Working with file versions

View a list of all versions of a file, open a previous version in the online viewer, and restore a file to an earlier version.

## View versions

View a list of all versions of a file, and open a previous version for viewing.

1. In the content area, locate the file that you want to view.
2. Next to the file, click  > **Versions**.  
A list of versions appears.
3. To view a previous version, select the version that you want to view, and click  > **View**.  
The file version is opened in the online viewer.

## Restore a file to an earlier version

Restore a file to a previous version.

1. In the content area, locate the file that you want to view.
2. Select the file that you want to restore to an earlier version, and click  > **Versions**.  
A list of versions appears.
3. To set a particular version as the current version, select the version and click  > **Set as current version**.  
A confirmation message confirms the operation.  
**Note:** The earlier file version is restored in the folder or workspace. The later version becomes a saved version.

# View additional information about files, users, and groups

File information including size, upload and modification history, and your permissions for the file can be viewed in the **File info** tab of the management pane. From here, you can also access previous versions of the file and tag the file.

1. In the content area, select the file.  
The **File info** tab is displayed in the management pane.
2. Click  to copy a link to the file to share with others.  
The link is copied to your clipboard.
3. Paste and send the link as desired.

## Add tags to files

Tag your files to help filter your files when searching. Tag options are defined by the organization Workspaces administrator and can be assigned to any file in a workspace by the file owner.

1. In the content area, locate the desired file.
2. In the management pane, click the **File info** tab.
3. Next to **Tags**, click **Add**.
4. Select a tag type from the **Category** drop-down list.
5. In the tag box, name the tag.
6. Click **Add** to add the tag to the selected file(s).

## View the tracking map

View a map tracking user activity related to the selected file (including user email address, activity, date and time, and site location - city, state, country) for files in workspaces where you are administrator. View an activity log which shows details regarding activities performed on the selected file.

**Note:** The activity log can be viewed per file only.

1. In the content area, locate the desired file.
2. Access the **File activities** tab in the management pane.
3. Use your mouse to zoom in and out of, and pan the map.

4. Click a user in the **Last activities** list to view more information about each activity on the map.

## View a file activity log

View an activity log which shows details regarding activities performed on a selected file.

**Note:** The activity log can only be viewed for a file, not a folder.

1. In the content area, select the desired file.
2. Access the file's **File activities** tab in the management pane.
3. Click **Full Log**.

The log opens in a separate window or tab in your browser. It shows all access activities for the selected file, indicating who accessed it, the device used, and the location.

4. To filter the log by date, enter the range in the **Set date range** area.
5. To export the displayed portion of the log, click **Export log**.

# Managing access

The **Permissions** tab is displayed for a selected workspace, folder, or file, when you are an administrator in the workspace. As workspace administrator, manage who can access your workspace, folders, and files. New members can be added as individuals, an email domain, or as an Active Directory or regular group. For each member or group of members, set their role, and access permissions for a selected workspace, folder, or files. If necessary, you can edit the roles and permissions.

For more information on the meaning of user roles and permissions, including customized access to folders and files, see [About user roles, sharing, collaboration and permissions](#).

## Working in the Permissions tab

Filter and sort the **Permissions** tab to access permission information.

1. In the content area, access the **Permissions** tab in the management pane.
2. To toggle between displaying all permitted entities for the selected item, click **Show permitted only** or **Show all**.
3. To sort the displayed list, click **Sort** and select one of the following:
  - **Sort by name:** toggle between sorting the list alphabetically A-Z or Z-A
  - **Filter by type:** choose group, user, Active Directory group, or email domain.
  - **Filter by role:** choose visitors, contributors, or administrators.
4. To search for an entity in the list, start typing the desired group name in the **Search** box. The list is filtered to show only matching items.

## Permission access levels

Workspace members in the **Permissions** tab are displayed with an access level icon. The following table provides a description of each icon:

Access level icon	Description
	This icon indicates that the workspace member has full access permissions.
	This icon indicates that the workspace member has Advanced Rights Management permissions, meaning that they can view files online and download protected files.
	This icon indicates that the workspace member has online only tracked access.

# Adding new members to a workspace, folder or file

Add new groups, individuals, Active Directory groups, or an email domain.

**Note:** You can also add individuals by sharing the workspace, folder or file.

1. In the content area, select the workspace or file to which you want to add groups.
2. Access the workspace **Permissions** tab in the left pane.
3. Click . You can choose to add individual users (by email address), an entire email domain (company.com) or an Active Directory group (if your Organization's Workspaces server is connected to an Active Directory server).
4. Select the group type: **Group**, **Active Directory Group**, or **Email Domain**.
  - a. If you select **Group**, enter a group name, group description, and in the group members area, enter email addresses or distribution lists.
  - b. If you select **Active Directory Group**, enter the Active Directory group name and a description.
  - c. If you select **Email Domain**, enter the Domain name.
  - d. If you select **User**, enter the email addresses of users you want to add.

5. Click **Next** to set permissions for the new group.

**Note:** See [About user roles, sharing, collaboration and permissions](#) for details about the permissions that can be assigned.

6. Select the **Role**. For more information, see [About roles](#).

**Note:** If you set the role of an Active Directory group to Administrator, this role **cannot** be changed later. If you set the role of an Active Directory group to Contributor or Visitor, the role cannot be changed to Administrator at a later time.

7. Select the **Permission** level. For more information see [About permissions](#).

**Note:** The **Advanced Rights Management** permissions set is available for Workspaces Enterprise ES Mode and Workspaces Enterprise ES (Restrict Full Access) Mode only. For more information, contact your organization administrator.

8. In the **File expiration** list, set the time when the file will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.

If you select **Specific date**, click  and choose the desired date from the calendar.

9. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.
10. Select if to apply the permission you are giving to **This folder and subitems that inherit permissions only**, or select if the permission you are granting will apply to **This folder and all subitems**.
11. Click **Add**.

A confirmation message appears confirming the operation.

## Editing member permissions

Edit permissions for workspace members, change the group name or description, add or remove users from groups or the workspace, or delete an entity.

### Edit access

1. Navigate to the the workspace, folder, or file that you want to edit access to.
2. In the **Permissions** tab on the management pane, select the desired entity.
3. Next to the entity that you want to edit, click  and select **Edit**.
4. To edit group details, do the following:
  - a. To change the group's name, select the current group name and type a new name.
  - b. To change the group's description, click the box containing the current group description and type a new description.
5. Select the desired **Role**. For more information, see [About roles](#).  
**Role** appears when editing access to a workspace or folder only.
6. Select the desired **Permission**. For more information see [About permissions](#).  
**Note:** The **Advanced Rights Management** permissions set is available for Workspaces Enterprise ES Mode and Workspaces Enterprise ES (Restrict Full Access) Mode only. For more information, contact your organization administrator.
7. In the **File expiration** list, set the time when the file will no longer be accessible by the recipients. Select a specific date, a time period from the list, or never.  
If you select **Specific date**, click  and choose the desired date from the calendar.
8. In the **Watermark** list, set whether the file is displayed with a watermark when viewed using a Workspaces viewer.
9. Click **Apply**.  
Your changes are saved.

### Revoke access

Revoke access to workspaces, folders, or files for any workspace member.

1. In the content area, select the workspace, folder, or file that you want to revoke access to.

2. In the **Permissions** tab from the management pane, select the item that you want to revoke access for.
3. Do one of the following:
  - Click .
  - Hover next to the item, click **Edit** and in the permission field, select **No access**.
4. In the confirmation message, click **Apply**.  
The entity can no longer access the item.

## Restore access

Restore access to a workspace member or group for the selected item.

1. In the content area, , select the workspace, file or folder for which you want to restore permissions.
2. Access the item's **Permissions** tab.  
The Permissions tab displays two sub tab options: **Show permitted only** and **Show all**.
3. Select the **Show all** tab and locate the member or group for which you want to restore permissions.
4. Hover over the member you want to restore, and click  > **Edit**.
5. In the **Permission** list, set the new permissions level as desired.
6. Click **Apply**.  
A confirmation confirms the operation.

## Working with groups

View group members, and add and remove group members.

### View group members

1. In the content area, locate the relevant workspace or folder.
2. In the **Permissions** tab of the management pane, select the relevant group.
3. Next to the desired group, click  and select **Members**.  
The group's members are displayed.

## Add users to groups

1. In the content area, select the relevant workspace.
2. In the **Permissions** tab of the management pane, select the group to which you want to add users.  
**Note:** You cannot add users to an email domain group.
3. Next to the group, click  and select **Members**.
4. Click .
5. In the **Add members** box, enter an email address or distribution list name and press the return key.
6. Repeat step 5 to add more users or distribution lists.
7. Click **Add**.  
The users or distribution lists are added to the group.  
**Note:** Users do not receive notification that they have been added to the group.

## Remove users from groups

1. In the content area, select the relevant workspace.
2. In the **Permissions** tab of the management pane, select the group from which you want to remove users.
3. Next to the desired group, click  and select **Members**.
4. Select the group member(s) that you want to delete.
5. Click .  
A confirmation message confirms the operation. The selected members are removed from the group.

## Delete workspace members

Delete groups, individuals, or email domains and remove them from the workspace.

1. In the content area, select the relevant workspace.
2. In the **Permissions** tab of the management pane, select the group that you want to delete.
3. Do one of the following:
  - Select the group from the group list and click .

- Next to the group that you want to edit, click  and select **Delete**.

A message confirms the operation, and the selected group is removed from the workspace.

## Message workspace members

Send an email message to one, all, or selected members of the selected workspace, folder, or file. A link to the selected item is included in the email message, which the recipient can open.

1. From the content area, select the desired workspace, folder, or file.
2. Access the **Permissions** tab of the management pane.
3. Select the group(s) and members that you want to message from the member list.
4. Click .

**Note:** You cannot send a message to an email domain.

5. In the **Subject** box, enter a subject for the message.
6. In the **Message** box, enter text for your message.
7. Click **Send**.  
A confirmation message confirms the operation.

## Restore inheritance

Folders and files that have broken inheritance (different permissions) from their parent workspace or folder are shown with the broken inheritance overlay:



Perform the steps described here to restore the permissions held by the parent workspace or folder.

For more information on inheritance, see [About customizing access to folders or files](#).

1. Browse to and select the item for which you want to restore inheritance.
2. Access the **Permissions** tab in the management pane.
3. Click **Inherit now**.
4. If restoring inheritance to a folder, do one of the following:

- Select **This folder only** to apply the permissions to this folder only.
- Select **This folder and all subfolders** to apply the permissions to the folder and all its subfolders, including those with broken inheritance.

The selected item inherits the access roles and permissions of the parent.

If you selected **This folder and all subfolders**, the inherited permissions are applied to all sub-folders or files that inherit permissions from the folder for which you are restoring inheritance. Any sub-folders or files that have broken inheritance are not affected by this change.

# Working with hidden files and the recycle bin

Workspaces, and Sent items include a recycle bin. Items that you delete are moved to the recycle bin in that location. In your Received items list, files can be hidden from view and are available to restore from the Hidden files list.

Restore files that were accidentally hidden or deleted, or permanently delete files to clear space.

## Delete a folder or file permanently

Delete files from the recycle bin to permanently delete them from Workspaces.

1. From the management pane of the workspace content area or Sent items list that contains the deleted folder or file, click **Recycle bin**.
2. Select the folder(s), or file(s) to delete, click . The selected folder(s) or file(s) are permanently deleted from Workspaces.

## Restore a deleted or hidden folder or file

Restore files that you have deleted from workspaces or Sent items, or have hidden in your Received files list. Use this feature when you have deleted files from your Workspaces client applications and wish to restore them.

**Note:** Files and folders previously deleted from the recycle bin are not restorable.

1. Do one of the following:
  - From Workspaces or your Sent items list click **Recycle bin** in the management pane.
  - In your Received files list, click **Hidden files** in the management pane.
2. Hover over or select the folder or file that you want to restore, and click **Restore**. The selected file is restored and appears in the location from which it was hidden or deleted.

# Working with notifications

Access your Workspaces notifications from the top bar to view and manage your file, workspace or folder permission requests.

Click  and select either **File permission requests** or **Workspace/folder permissions requests** to access the desired notifications list.

## Handle file permission requests

1. From the Workspaces top bar, click  to access your permission requests to share files.
2. Click **File permission requests** to display the request list.
3. Click the file request that you want to handle.

The handling options available in the **Requests** tab may vary depending on the nature of the request and the location of the requested file.

**Note:** Requests are listed per file, and may include single or multiple requests.

The **Requests** tab appears in the management pane on the right of the screen.

4. Do one of the following:
  - To approve the request by sending a copy of the file, select **Approve this request**, and set the permission level and/or file expiration date.  
For more information on permissions, see [About user roles, sharing, collaboration and permissions](#).
  - To approve the request by adding the user to the workspace, select **Approve by adding the user to**, click **Directly to the workspace**, and then select the desired role, permissions, file expiration, and watermark settings.
  - To approve the request by adding the user to a group, select **Approve by adding the user to**, select **An existing workspace group**, and click **Choose group** to select the group.
  - To deny the request, select **Deny this request**, and select **Notify the user** to send notification.

5. Click **Apply**.

The user is notified if the request was approved. If you denied the request, no notification is sent unless you chose to send a notification.

**Tip:** To view the workspace or folder information or permissions, access the information or permission tabs in the management pane.

# Handle workspace or folder permission requests

1. Access your request notifications  from the top bar.
2. Click **Workspace/folder permission requests** to display the list.
3. Click on the the desired request in the list.

**Note:** Listed requests are per workspace or folder, and may include single or multiple requests.

The **Requests** tab appears in the management pane on the right after selecting a workspace or folder from the list.

4. Do one of the following:
  - To approve the request by adding the user directly to the workspace, select **Approve by sending a copy of the file**, select the permission level to assign and click **Apply**.
  - To approve the request by adding the user to a group, select **Approve by adding the user to:**, and select from **An existing workspace group** depending on your level of permissions, and click **Apply**.
  - To deny the request, select **Deny this request**, and select **Notify the user** to send the notification.

5. Click **Apply**.

The user is notified if the request was approved. If you denied the request, no notification is sent unless you chose to send a notification.

# About user roles, sharing, collaboration and permissions

Security, sharing, collaboration, and recipient sign in within Workspaces are defined by user roles and permissions. User roles and permissions are set for each workspace group.

## About workspace members

Workspace members can be added individually and assigned a role and permission set, or organized into groups with a group role and permission set. Members can access all workspace folders and files unless your organization's Workspaces administrator specifies otherwise. Members are workspace-specific and their defined permissions in one workspace does not grant them access to other workspaces or their folders and files.

## About roles

Use roles to determine user management capabilities within your workspaces. You define roles when you create a workspace, and you can change or remove roles later by editing the group.

There are three standard roles with pre-defined capabilities. Organizations that are configured for creating custom roles can offer additional roles with unique capabilities.

### Description of standard roles

#### Administrators

Workspace administrators have full control over the workspace and its folders and files (upload, download, move, delete, and so on). Administrators can also manage workspace groups and users. By default, the workspace creator is added to the Administrators group.

#### Contributors

Contributors perform the following actions:

- Folder level: Add and delete folders, move files across folders. Download original, download controlled, copy link, move, and rename folders.
- File level: Add and remove files, view online, download originals for files uploads, print, download controlled versions, upload new versions, view versions and annotations, copy link, move, rename.

## Visitors

Visitors can access workspace files depending on their permissions. Visitors cannot upload files to workspaces. Default file permissions for visitors are set by your organization administrator. Define users as visitors when creating a group.

# About permissions

Use permissions to define user access rights for workspace files. A number of permission sets are available, depending on what has been set by your organization Workspaces administrator, and according to the Enterprise mode of operation that is in effect for your organization.

## Available permission sets

### Full access

Users with full access permissions can perform all actions in the Workspaces app.

### Advanced rights management

The **Advanced Rights Management** permission sets are available for Workspaces Enterprise ES Mode and Workspaces Enterprise ES (Restrict Full Access) Mode only.

The following table details the available permissions for each advanced rights management permission level.

	Download Full access	Download Controlled	View online	Copy	Edit	Print	Programmatic access
<b>Download protected, edit, copy &amp; print</b>	-	Yes	Yes	Yes	Yes	Yes	-
<b>Download protected, edit &amp; print</b>	-	Yes	Yes	-	Yes	Yes	-
<b>Download protected &amp; edit</b>	-	Yes	Yes	-	Yes	-	-
<b>Download protected &amp; print</b>	-	Yes	Yes	-	-	Yes	-

<b>Download protected</b>	-	Yes	Yes	-	-	-	-
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**Online only**

	<b>Download Full access</b>	<b>Download Controlled</b>	<b>View online</b>	<b>Copy</b>	<b>Edit</b>	<b>Print</b>	<b>Programmatic access</b>
<b>View &amp; print</b>	-	-	Yes	-	-	Yes	-
<b>View</b>	-	-	Yes	-	-	-	-
<b>Spotlight view</b>	-	-	Spotlight view only (blurred outside of subject area to block over the shoulder viewing)	-	-	-	-
<b>No access</b>	-	-	-	-	-	-	-

# About customizing access to folders or files

After a group is defined, group members can access all workspace folders and files, unless otherwise defined.

Once a folder or file is created, permissions can be adjusted by accessing the permissions tab of the management pane and apply giving different permission levels. When adding new users or groups, you can also select if you want to add them to all folders and subfolders or only to add them to the inherited ones.

If you choose to allow only certain groups to access a certain folder or file, this creates broken inheritance with the parent

workspace or folder, and the item icon is marked with a broken chain; .

If you break inheritance for a folder that contains other items, inheritance is broken for all child items as well, meaning that any subfolders or files under that folder now inherit the permissions set for that folder.

## About collaboration

When sharing files with others, you can allow your recipients to upload new versions of the file. This is useful for when you want to collaborate with others on the file, meaning they can edit the file and share the new version with all recipients.

There are two ways that you can collaborate on a sent file. The first is to add recipients to the sent file, which means that you are expanding the group of people who can work on the file. The second is to send a copy of the file, which means that you are creating a separate version of the file for collaboration with a different person or group of people.

In your Received and Sent files where upload of new versions is allowed are marked with .

When you or any of your recipients upload a new version, files are marked with . Click the icon to view a list of versions. From the list, you can switch the current version to another version. You can also access the **File activities** tab to see an overview of activities performed on the file by members of the collaboration group.

When a recipient uploads a new version, the versions icon is updated to reflect the new version, and on the first update, the file appears in your Workspaces Received files list. In addition, when uploading a new version, anyone can decide whether or not to send a notification. When selected, a notification is sent to the mail client of all recipients.

## About requiring recipient sign in

Organizations that enable users to share files without requiring recipient sign in (simple sharing) can choose whether or not to give users the option to require their recipients to sign in to access sent and forwarded files. If your organization has simple sharing enabled and has given you the option to choose whether or not your recipients are required to sign in, the **Require recipients to sign in** check box is displayed in the Quick send, and Send new File windows.

Select the **Require recipients to sign in** checkbox to require recipients to sign in to Workspaces to access the file. When the checkbox is selected, the **Manage permissions** link is displayed. Click **Manage permissions** to set the recipient access permissions to the file.

Clear the **Require recipients to sign in** checkbox to waive the need for recipients to access the file without signing in.

When cleared, users are sent a link giving them access to the original version of the sent file. They can download the file and there is no tracking or restrictions on their use of the file. In this case, access to the file is tracked by Workspaces by the user's email when the user is authenticated to Workspaces, or under the alias "anonymous" if the user is not authenticated.

Once the file has been shared without requiring recipient sign in, you cannot change the recipient permissions to the file. Should you need to revoke recipient access to the file, you must delete the file from your sent items.

**Note:** Shared annotations cannot be viewed by recipients unless you select the **Require recipients to sign in** checkbox when sending the file.

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