User Guide

BlackBerry Workspaces for Windows

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Contents

Introducing BlackBerry Workspaces for Windows

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BlackBerry Workspaces for Windows enables you to easily and intuitively sync and share your folders and files to collaborate with other users directly from your PC.

Installing Workspaces for Windows creates a Workspaces Folder on your PC from where you can manage your files in workspaces and subfolders, just as with any folder on your computer. The Workspaces Folder is automatically synced with the Workspaces server and can be accessed from the Workspaces Web Application and on any other devices where you have Workspaces installed.

The Workspaces Folder contains workspaces which are folders that you create or that are shared with you by other users. If you are a workspace owner, you are also assigned a personal workspace when you first sync with the Workspaces Web Application. When using the "move to Workspaces" command, folders and files are automatically placed in your personal folder, called **My Workspace**.

Share your workspaces with other users. New files and changes you or other users make in a shared workspace are automatically updated to all the members of this workspace.

Use Workspaces advanced features to restore changes, recover deleted files, and assign user roles (such as **Contributor** with permissions to share file changes, or as **Visitor** without permissions to share changes).

View tracked information of user activities affecting the files in your workspaces.

View Workspaces-secured files in Adobe Reader or Microsoft Office

Workspaces for Windows includes plugins for Microsoft Office 2003-2013, Adobe Acrobat (versions 8 thru 11), and Adobe Reader (versions 8 thru 11), that enable you to work with Workspaces-controlled documents from within these applications.

Send files and collaborate securely from Microsoft Outlook

Workspaces for Windows includes a plugin for Microsoft Outlook that can protect attachments in outgoing emails. When you choose to protect your attachments, Workspaces replaces the attachment with a link from where the file can be downloaded, and uploads, encrypts, and stores the file on the Workspaces server.

Enable collaboration to allow your recipients to work on shared files and track any actions made on the file directly within Outlook.

Note: Microsoft Outlook versions 2010, 2013, and 2016 are supported.

Getting Started

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Setting up and installing BlackBerry Workspaces for Windows

Download and install BlackBerry Workspaces for Windows.

After the installation, BlackBerry Workspaces creates a Workspaces Folder in your Windows Explorer, a shortcut to the Workspaces Folder on your desktop, and a Workspaces icon in the system tray, through which you can perform various Workspaces-related actions.

Signing in to BlackBerry Workspaces for Windows

After installation, you are prompted to sign in to Workspaces. Sign in by the relevant method as set by your organization, see:

- Signing in using your email account
- Signing in with username and password

Signing in using your email account

Follow these steps if your organization is configured for email authentication.

1. Right-click the Workspaces icon in the taskbar, and select **Sign In**.
2. In the **Email** box, enter your email address.
3. In the **Site** box, enter the URL provided by your Workspaces Organization Administrator; otherwise leave it with the preset default value.
4. Click **Sign in**. An authentication email is sent to the email address supplied.

5. Open this email in your regular email, copy the verification code, and return to the sign-in screen.
6. Enter the verification code.
7. You are signed in.
8. Click **OK**.
   The Preferences window opens on the **Workspaces** tab.
9. Select the workspaces that you want to sync to your computer and click **OK**. For more information, see Managing synced workspaces.

After you finish:

Note: If your network uses a proxy, this will have to be configured. For more information, see Configuring proxy settings.

Sign in with username and password

Follow these steps to authenticate if your organization is configured for sign in by username and password.

1. Right-click the Workspaces icon in the taskbar, and select **Sign In**.
2. In the **Email** box, enter your email address.
3. In the **Site** box, enter the URL provided by your Workspaces Organization Administrator; otherwise leave it with the preset default value.
4. Click **Sign in**.
5. Enter your email address and password.
6. Click **Sign in**.
   The Preferences window opens on the **Workspaces** tab.
7. Select the workspaces that you want to sync to your computer and click **OK**. For more information, see Managing synced workspaces.

After you finish:

Note: If your network uses a proxy, this will have to be configured. For more information, see Configuring proxy settings.

Sign out

1. Right-click the Workspaces icon in the taskbar, and select **Preferences**.
2. Click the **My account** tab.
3. Do one of the following:
   - To sign out of one account, next to the account that you want to sign out of, click **Sign out**.

- To sign out of all of your accounts, click **Sign out of all accounts**.

The Workspaces Folder, and all workspaces and files in it, are removed from your computer. The workspaces and files remain on the Workspaces server, and are restored to the desktop Workspaces Folder when you sign in again using this user account.

Add a new account

Add an account to authenticate additional Workspaces accounts on your PC.

1. Right-click the Workspaces icon in the taskbar, and select **Preferences**.
2. Access the **My account** tab. The **Accounts** area displays a list of accounts you use to sign in to Workspaces. Workspaces synchronizes the files if the sync account to the Workspaces Folder. You can open files that were sent to any of your Workspaces accounts, provided you are signed in to the account.
3. Click **Add account**.
4. Sign in to Workspaces with your email or username and password. See Signing in to BlackBerry Workspaces for Windows for more information. Once you have completed the sign in process, a confirmation message is displayed.
5. Click **Finish**.
   The account is added.
6. To download and open files shared via Workspaces on this account on your PC, click **Set as sync account**.
7. Click **OK** to close the Preferences window.

Managing settings

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Manage your Workspaces for Windows settings in the Preferences window:

- Decide how to work with Workspaces-protected documents in Microsoft Office, turn on the ability to protect attachments in Microsoft Outlook, and set how Workspaces-protected PDF files are opened. For more information, see Enable plugins.
- If applicable, configure your proxy server settings. For more information, see Configure network settings.

Enable plugins

1. Right-click the Workspaces icon in the taskbar, and select **Preferences**.
2. Access the **Plugins** tab.
3. To turn on Workspaces for Microsoft Outlook, select **Protect files you send from Microsoft Outlook with Workspaces**.

   For information on configuring the plugin, see Configure Workspaces for Microsoft Outlook.
4. In the **Work with Workspaces-protected PDF documents** area, click **Set Workspaces Viewer as default** to set the default program to use when opening Workspaces-protected PDF files to the Workspaces Viewer.
5. Click **Apply**.

Configure network settings

Before you begin: If your network uses a proxy, configure the proxy settings in order to work with Workspaces, and enhance performance by adjusting your bandwidth settings.

1. Right-click the Workspaces icon in the taskbar, and select **Preferences**.
2. Select the **Network settings** tab.
3. To set Workspaces app for Windows to automatically detect your proxy settings, select **Auto-detect**.
4. To set specific proxy settings, select **Use the following proxy settings** and enter the URL and port number of the proxy server.
5. If authentication details are also required for your server, select **Proxy requires authentication**, and enter the username and password.

Note: If your Windows network settings use an automatic configuration script, you can leave out the proxy details, and they will be set by script.

6. To limit the download rate, select **Limit download rate to** and enter the desired limit in kilobytes per second.
7. To limit the upload rate, select **Limit upload rate to** and enter the desired limit in kilobytes per second.
8. Click **Apply**.
9. If the credentials are incorrect or missing, you are prompted to enter your credentials.

Working with workspaces

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Workspaces are folders that you create or that are shared with you. Workspaces can contain folders and files. Use workspaces to manage your documents.

Accessing the Workspaces Folder

- Right-click the Workspaces icon in the taskbar, and select **Workspaces folder**.

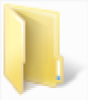
  Access your workspaces and any files they contain as you would a regular folder.

About workspace types and roles

If you are a workspace owner, a personal workspace named **My Workspace** is created for you following your first sync. Your personal workspace is the default folder for files that you move to the Workspaces Folder using the "**Move to My Workspace**" command, and for files that you drag to the Workspaces root folder.

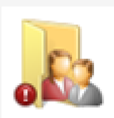
Your personal workspace is marked with the following icon:

Workspace icons show the workspace type, as shown in the following table:

Workspace type	Icon
Workspaces workspace	
Windows Files Share workspace	
SharePoint workspace	

About workspace status

Small overlay icons at the bottom left corner of the workspace, folder, or file icons indicate the status of synchronization.

Icon	Description
	The item has synced.
	The item is syncing (files are being uploaded or downloaded).
	This item has a sync error.

If there is no overlay icon, it can indicate that there is currently no connection with the Workspaces server, or that the folder has not been synced.

Annotations

If you are adding the folder to Workspaces, you can sync the folder in order to create a workspace on the server. See Managing synced workspaces.

The following icon indicates that a file has annotations:

Annotations can be viewed by opening the file in the Workspaces PDF Viewer. See Open files in Workspaces Viewer for more information.

Syncing workspaces

Manage your synced workspaces, check the sync status and troubleshoot any errors. Pause sync if necessary, and re-sync a workspace.

Switch accounts

1. Right-click the Workspaces icon in the taskbar, and select **Switch sync account**.

2. Choose the account that you want to set as the current sync account.

   Note: If you do not see the account that you want, click **Manage accounts**, and add the account.

3. Click **OK**.

4. The account you selected is set as the sync account. If you have already worked with this account, your account workspaces are synced to your computer. If this is the first time you are using the selected account, you are prompted to select which of your account

   Tip: You can also switch accounts in the Preferences window **My account** tab: click **Set as sync account** next to the desired account.

Manage synced workspaces

Before you begin: After signing in, you are prompted to select workspaces to synchronize to the Workspaces Folder. Workspaces downloads these workspaces and any files they contain into your Workspaces Folder. Thereafter, manage the workspaces you want to sync on your computer by selecting them in the Preferences window **Workspaces** tab. All selected workspaces are continuously synced.

Note:

If you "delete" a workspace by right-clicking the workspace and selecting **Delete**, this action removes the workspace from the synced workspaces list only, i.e, the workspace is removed from your Workspaces Folder, but not from the Workspaces server. To restore the workspace, select the workspace in the Synced Workspaces window.

If you delete a folder (within a workspace) by right-clicking it and selecting **Delete**, the folder is removed from your Workspaces Folder, and from the Workspaces server. To restore it, use Workspaces Web Application.

1. Right-click the Workspaces icon in the taskbar, and select **Preferences**.

2. In the **Preferences** dialog box, select the **Workspaces** tab.

3. Add or remove workspaces that you want to sync.

   If you select additional workspaces, Workspaces downloads them into the Workspaces Folder.

   If you clear a workspace in the list, it is deleted from the Workspaces Folder and is no longer synced. Your selection is remembered the next time you log in and in subsequent application upgrades.

   Note:

   If you have a shared workspace with the identical name as one of your local workspaces, upon sync, the shared workspace is named with the suffix Created By*<xxx>*.

   Not all files and folders can be synced with the Workspaces server. Some file types are not supported, and in addition, your organization administrator may prevent some file types from syncing with Workspaces. Hidden files and folders are not synced. If you encounter problems syncing files or folders, contact your administrator.

4. Click **Apply**.

Tip: Use the arrows to sort the **Workspaces** and **Roles** columns alphabetically.

Sync new workspaces

If you are invited to a new workspace, a notification appears in the taskbar, or go to the **Preferences** window **Workspaces** tab to see new shared workspaces.

1. Click the popup message.
2. Select the shared workspace(s) that you want to sync, and click **Apply**.

After you finish:

Note: If you have a shared workspace with the identical name as one of your local workspaces, upon sync, the shared workspace is named with the suffix Created By<*xxx*>.

View a list of sync errors

Before you begin: If there was a problem syncing your files, an item appears in the taskbar menu.

1. Right-click the Workspaces icon in the taskbar, and select ***x*** **Sync error(s)**. The Workspaces Sync Errors window appears.
2. Click the file name to locate the file.
3. If available, click the suggested solution to solve the issue.
4. Click to view more information about the error and the suggested solution.
5. Follow the instructions in the solution to remove the error.

Check sync status

Check the sync status to view which files are currently being synced, uploaded, or downloaded.

Right-click the Workspaces icon in the taskbar, and select the dynamic sync progress menu item, for example, "31 files, 36MB left".
A window opens showing the files waiting to be downloaded or uploaded.

Pause and resume sync

Pause sync activity between your Workspaces Folder and the Workspaces server to save system resources.

Right-click the Workspaces icon in the taskbar, and select **Pause sync**.

After you finish: Right-click the Workspaces icon in the taskbar, and select **Resume sync**.

Re-sync a workspace

Before you begin: Force a workspace to re-sync with the Workspaces server to ensure that the local workspace is up to date.

This is useful, for example, to restore a file that you deleted from the Workspaces Folder where you do not have sufficient rights to remove it from the workspace. By re-syncing the workspace, the file is restored to your local Workspaces Folder.

1. Right-click the workspace folder and select **Workspaces** > **Re-sync**.
   A confirmation message appears.
2. Click **Yes**.
   The workspace is re-synced.

Share a workspace or folder

Workspace administrators can share their workspaces with other users.

Note: Workspaces are folders located directly under the Workspaces Folder. Workspaces can contain folders, but folders cannot be shared separately.

1. Right-click the workspace folder and select **Workspaces** > **Share**.
   The Share Workspace window appears.
2. In the **Add members** area, enter the email addresses of users you want to share the workspace with.
3. In the **Personal message** box, enter a message (optional).
4. In the **Roles** list, select the role that you want to assign to the members you are adding. For more information, see About roles.
5. In the **Permission** list, select the user access rights for the workspace. For more information see About permissions.
6. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.
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 the calendar icon and choose the desired date from the calendar.
8. Click **Share**.

Copy the link to a workspace, folder, or file

Copy the link to a synced workspace, folder, or file, to share the link with users that have permission to the workspace.

1. Right-click a synced workspace, folder, or file, and select **Workspaces** > **Copy link**.
   A balloon notification appears informing you that a link was copied.

Note: Click the balloon to follow the link to the item in the Workspaces Web Application.

2. Paste the link into an email and send the mail.
   The link is sent to the recipient. Recipients can access the workspace if they already have access to the workspace. If you wish to share the workspace with a new user, see Sharing workspaces.

Move and copy folders and files to the Workspaces Folder

Note: You must be a workspace owner to perform this action.

Use the Workspaces context menu to move folders and files that you want to sync into the Workspaces Folder in order to streamline your workflow. When working on the sync folder drive, you can move folders and files to Workspaces; when working on other drives, you can copy folders and files.

Move a folder and its contents to the Workspaces Folder

- Right-click the folder that you want to sync, and select **Workspaces** > **Move & create new workspace**(from the sync folder drive), or **Copy & create new workspace** (other drives).
  The folder is moved or copied to your personal workspace in the Workspaces Folder, and the folder is synced.

Move a folder and its contents to the Workspaces Folder, and share the workspace

1. Right-click the folder that you want to sync, and select **Workspaces** > **Move & create new workspace and share** (from the sync folder drive), or **Copy & create new workspace and share**(other drives).
2. In the **Add members** area, enter the email addresses of users you want to share the workspace with.
3. In the **Personal message** box, enter a message (optional).
4. In the **Roles** list, select the role that you want to assign to the members you are adding. For more information, see About roles.
5. In the **Permission** list, select the user access rights for the workspace. For more information see About permissions.
6. In the **Watermark** list, set whether workspace PDF files are displayed with a watermark.
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 The calendar icon and choose the desired date from the calendar.

8. Click **Share**.
   The folder is moved or copied to your personal workspace in the Workspaces Folder, and your folder is synced. When the folder is moved or copied, a confirmation message appears in the **Move to WatchDox & Share Workspace** dialog.
9. Click **Close**.

Move files

Use Workspaces for Windows to upload files of up to 10GB. Move files on your sync folder drive to Workspaces, or copy files from other drives.

1. Right-click the file that you want to sync.
2. In the menu, select **Workspaces** > **Move to My Workspace** (from the sync folder drive), or **Copy to My Workspace** (other drives).
   The file is moved to your personal folder in the Workspaces Folder, and the folder is synced.

View sync details

View sync information and your capabilities for any workspace, folder, or file in your Workspaces Folder.

Right-click a workspace, folder, or file, and select **Sync details**.

Working with files

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Upload a file

Drop a file on a synced workspace or file to upload it to that location. Use the **Upload to Workspace** command to upload one or more files to any non-synced workspace or folder where you have upload permissions.

1. Right-click the file that you want to upload to a non-synced workspace or folder, and select **Workspace** > **Upload to Workspace**.
2. In the Upload to Workspace dialog, browse to and select the target location for the file.
3. Click **Upload**.
   The file is copied and uploaded.

Locking files

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

File lock is available in organizations when enabled as a file policy and can be executed by workspace administrators, contributors,and users with a customized role with update abilities.

Locking files

Files are locked using the locking action only; opening or editing a file does not lock the file. If you lock a file while another user is working in the same file, they receive a notification in the open file. If they save the file after you locked it, their file is saved as a conflicted copy.

Unlocking files

Once locked, files are locked for a default of 24 hours after which time the file is automatically released. Files can be unlocked at any time by the person who locked the file or by a workspace administrator. An email notification is sent to the locking user when the lock expires or when the file was unlocked by an administrator. If your account is deleted from your organization, your locked files are automatically released.

Lock a file

- Do one of the following:
    - From Windows Explorer, right-click the file that you want to lock, and select **Workpsaces** > **Lock** . To release the file: right-click the file and select **Workspaces** > **Unlock** .

- When working on an Office file, locate the Workspaces ribbon in the Home tab and click **Lock file**.

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

Locked files are marked with .

You can unlock a file:

- If you locked the file.
- If you are a workspace administrator.
- Do one of the following:
  - From Windows Explorer, right-click the file and select **Workspaces** > **Unlock** .
  - When working on a protected Office file, locate the Workspaces ribbon in the Home tab and click **Unlock file**.

Open a protected document

1. Open the protected document in the usual way.

   When opening protected Office documents in your Workspaces for Windows workspaces, you may be required to sign in to Workspaces. If you are asked to sign in, follow the steps below.

   Note: The sign in method may differ depending on your organization's configuration.

2. When the sign in dialog appears, enter your credentials, and click **Sign in**.
   A Microsoft message appears warning you that you are attempting to send information to an Internet site that is not in your trusted zones.
3. Click **Yes**.
4. If you do not want to see this message again while working on this server, click **Don't show this message again**.
   The document opens.

View a list of recently updated files

View a list of recently updated files in your Workspaces folders.

1. Right-click the Workspaces icon in the taskbar, and select **Recently updated files**.
2. Select a file in the submenu to open the containing folder in an explorer window with the file selected.

Manage permissions for sent files

Manage permissions for your sent files in the Workspaces Web Application.

1. Access and sign in to the Workspaces Web Application.
2. Go to > **Sent items**.
3. Select the sent item that you want to manage permissions for, and access the **Permissions** tab.
4. Change the current permissions per user, revoke the permissions, or add new users by forwarding the file, as desired.

After you finish: For more information, refer to the *Workspaces Web Application User Guide*.

Track file activity

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.

The activity log shows details regarding activities performed on the selected file.

1. Right-click the file and select **Workspaces** > **Track activity**.
   A page opens in your browser showing the last activity done by each user on this file along with a map showing where the activities took place according to IP geo-location.
2. Click **Full Log** on this page to view the full list of all the users' activities.
3. Click the heading of any column to sort the log by that column.
4. Hover your mouse over an activity to view more details.

Restore deleted items

Restore deleted folders and files from the Workspaces Web Application. When you delete a file or a folder that you have the necessary permissions to delete in a synced workspace or a workspace itself, it is moved to the Recycle bin. To restore a deleted workspace, contact your administrator.

Note:

If you "delete" a workspace by right-clicking the workspace and selecting **Delete**, this action removes the workspace from the synced workspaces list only, i.e, the workspace is removed from your Workspaces Folder, but not from the Workspaces server. To restore the workspace, select the workspace in the Synced Workspaces window.

If you delete a folder (within a workspace) by right-clicking it and selecting **Delete**, the folder is removed from your Workspaces Folder, and from the Workspaces server. To restore it, use Workspaces Web Application.

1. Access and sign in to the Workspaces Web Application.
2. In the location from where you deleted the item (Workspaces, Inbox, or Sent items), click **Recycle bin** in the info panel.
3. Hover over 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 deleted.

   Tip: To permanently delete the item, click **Delete**.

Working with Workspaces Viewer

Use Workspaces Viewer to open protected files and to review and create annotations created in Workspaces.

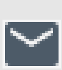
Open files in Workspaces Viewer

- Do one of the following:
    - Double-click a protected PDF file.
    - Right-click a file, and select **Workspaces** > **Annotate** .
    - Right-click a file with annotations, and select **Workspaces** > **View annotations** .

  Note: Any changes that you make to the annotations in the file are saved when closing the viewer and synced with the Workspaces server.

Common actions in Workspaces Viewer

Use the icons on the toolbar to do the following:

Icon	Description
	Print file
	Send a copy (see Send a protected file) or share annotations (see Share annotations)

Icon	Description
	Search within the file
	View actual size
	View at full size
	Fit the file to the width of the viewer
	Rotate clockwise by 90 degrees
	Rotate anti-clockwise by 90 degrees
	Zoom out
	Zoom in
100% ▾	Choose the magnification
1 / 224	Enter the desired page number to go to that page
	View annotations (for more information, refer to the following sections)
	View information to see your permissions

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 right 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.

Share annotations

Share annotations that you've made on a file with other workspace members.

Tip: To share annotations with anyone who is not a workspace member, send a copy of the file and include annotations (see Send a protected file).

1. In the Workspaces Viewer, click > **Share annotations** .

2. In the **To** box, begin typing recipients email addresses.

   The autocomplete feature suggests matches as you type. Choose to add individual users (by email address), distribution list, or an Active Directory group (if your Organization’s Workspaces server is connected to an Active Directory server).

   Tip: Click **Add all permitted members** to add all permitted workspace members.

3. In the **Subject** box, change the subject if desired.

4. In the message box, type a message, if desired.

5. Click **Send**.
   Authorized recipients can view the file by tapping on the link in the received email.

Sending files

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Send protected files from the Workspaces folder or via Microsoft Outlook.

Send a protected file

This task describes how to protect and send any file located in the Workspaces Folder or on the same volume as the Workspaces Folder to any email address. Sending a file creates a copy of the file which can then be managed in your Sent items, which is accessible via Workspaces mobile or web applications. You can also send a copy of a file from the Workspaces viewer. Sending a file in this way shares a copy of the workspace file with recipients.

Before you begin: To send a copy of a file, you must be defined in your oganization with an "Exchange sender" role, and your permissions for the file must be set to "full access" and no watermark.

1. Do one of the following:
   - Right-click the file that you want to send, and select **Workspaces** > **Send a copy**.
   - In the Workspaces Viewer, click > **Send a copy** .
2. In the **To** box, begin typing recipients email addresses.
   The autocomplete feature suggests matches as you type. Choose to add individual users (by email address), distribution list, or an Active Directory group (if your Organization's Workspaces server is connected to an Active Directory server).
3. In the **Subject** box, change the subject if desired.
4. In the message box, type a message, if desired.
5. Click **Settings**.
6. If the **Require recipients to sign in** check box is displayed, 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 want to share annotations with the file, click **Include annotations**.
8. If you want to allow recipients to work on the file(s) that you are sending, including uploading a new version, click **Enable collaboration**.

   For more information on collaboration, see About collaboration.
9. In the **Permission** list, select the desired permissions from the drop-down list:

Note: The permissions available and their defaults depend on what your organization administrator has set for your organization. You can change the default recipient permissions as desired for every file you send.

- **Full access (not tracked)**: Recipients can download an original or encrypted version, edit, copy-paste, and print.
- **Advanced Rights Management: Download protected, edit, print, copy**: Recipients can download an encrypted version, edit, copy-paste, and print.
- **Advanced Rights Management: Download protected, edit, print**: Recipients can view, download an encrypted version, edit, and print.
- **Advanced Rights Management: Download protected, & edit**: Recipients can view, download an encrypted version, and edit.
- **Advanced Rights Management: Download protected, & print**: Recipients can view, download an encrypted version, and print.
- **Advanced Rights Management: Download protected: View**: Recipients can view and download an encrypted version.
- **Online only: View & print**: Recipients can view files in the online viewer and print.
- **Online only: View**: Recipients can view files in the online viewer only.
- **Online only: Spotlight view**: Recipients can view files in the online viewer in spotlight view only. In spotlight view, text is visible only in the region of the pointer; the rest of the text is obscured.

10. In the **Watermark** list, set whether the file is displayed with a watermark.

    Note: When user permissions are set to **Full access**, watermarks are only displayed on PDF files.

11. 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**, choose the desired date from the calendar.
12. In the **Allow access to** list, select who can access the file:
    - **Everyone**: Everyone can access the file.
    - **Anyone within recipient's domain**: The recipient, and anyone else who signs in with an email in the same domain as the recipient, can access the file.
    - **Recipients only**: Only the recipients of the email can access the file.
13. Click **Send**.
    A confirmation message appears.
14. Click **Close**.
    The file is sent.

Sharing files via Outlook

Configure Workspaces for Microsoft Outlook to protect sent files with Workspaces, and set and manage permissions, even after sending.

Before you begin: ensure that the plugin is enabled in the Preferences window. See Enable plugins.

The first time you open Microsoft Outlook, the Workspaces wizard prompts you to configure the plugin. Thereafter, you can change your settings via the Workspaces plugin for Outlook window **Settings** tab accessed from the Workspaces ribbon.

Configure Workspaces for Microsoft Outlook

Set when to protect your attachments with Workspaces.

1. In Microsoft Outlook, access the Workspaces ribbon.
2. Click **Settings** and access the **Settings** tab and choose one of the following:

Select:	To:
For every mail	Protect all attachments with Workspaces automatically. Your attachments are protected using your organization's default permissions unless you choose different security settings before sending the mail.
Only when I click 'Protect attachments'	Protect attachments with Workspaces only when you click **Protect attachments** in the email. Your attachments are protected using your organization's default permissions unless you choose different security settings before sending the mail.
Ask me before sending	Be prompted to decide whether or not to protect your attachments per email. Select when to be prompted: • Select **Always** to be prompted every time you click **Send** when you have not chosen different security settings. • Select **Only when** and **Sending attachments larger than** and enter the desired file size in MB to be prompted only when sending files larger than the specified size and when you have not chosen different security settings. • Select **Only when** and **Sending to addresses outside my email domain** to be prompted only when sending files to anyone outside your email domain and when you have not chosen different security settings.

3. Click **OK**.

Send smaller files

Use this method if sending files of up to 25MB. You can customize permissions and security settings on a per-email basis. For future emails, the permissions and settings return to your organization's default settings.

1. Open a new email and enter a recipient and attach a file or files.

   Depending on your plugin settings, the **Set security for this email** panel may appear at the side of the mail.

   Tip: If it does not appear, click **Protect Attachments**  to display the panel.

   Note: The options available in the **Set security for this email** panel depend on your organization's Workspaces Mode configuration.

2. Do one of the following:

   - If you wish to protect your attachments with Workspaces and want to change the security permissions, perform steps 3-9, below.
   - If you do not wish to change the default settings, click **Send** now.
   - If you set to be asked before sending and you do not wish to protect your attachments with Workspaces, click **Send Unprotected** when prompted.
   - If you set to be asked before sending and you want to protect your attachments with Workspaces with the default settings, click **Send Protected** when prompted.
   - If you set to be asked before sending and you want to protect your attachments with Workspaces and want to change the security permissions, click **Set permissions** when prompted and perform steps 3-9, below.

3. If available, select **Protect Attachments** to ensure that your attachments are protected with Workspaces.

4. Select **Require recipients to sign in** to ensure recipients sign in to Workspaces to access the file.

   Note: If you do not select this option, recipients have full access (not tracked) and can download an original or encrypted version, edit, copy-paste, and print. For more information, see About requiring recipient sign in.

5. If you require recipients to sign in, in the **Permission** list, select the desired permissions:

   - **Full access (not tracked)**: Recipients can download an original or encrypted version, edit, copy-paste, and print.
   - **Advanced Rights Management: Download protected, edit, print, copy**: Recipients can download an encrypted version, edit, copy-paste, and print.
   - **Advanced Rights Management: Download protected, edit, print**: Recipients can view, download an encrypted version, edit, and print.
   - **Advanced Rights Management: Download protected, & edit**: Recipients can view, download an encrypted version, and edit.

- **Advanced Rights Management: Download protected, & print**: Recipients can view, download an encrypted version, and print.
- **Advanced Rights Management: Download protected: View**: Recipients can view and download an encrypted version.
- **Online only: View &print**: Recipients can view files in the online viewer and print.
- **Online only: View**: Recipients can view files in the online viewer only.
- **Online only: Spotlight view**: Recipients can view files in the online viewer in spotlight view only. In spotlight view, text is visible only in the region of the pointer; the rest of the text is obscured.

6. If you require recipients to sign in, in the **Watermark** list, set whether or not the file is displayed with a watermark.

   Note: When permissions are set to **Full access**, watermarks are only displayed on PDF files.

7. If you require recipients to sign in, 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, choose the desired date from the calendar.
8. If you require recipients to sign in, in the **Allow access to** list, select who can access the file:
   - **Everyone**: Everyone can access the file.
   - **Recipient’s email domain**: The recipient, and anyone else who signs in with an email in the same domain as the recipient, can access the file.
   - **Recipients only**: Only the recipients of the email can access the file.

9. If you want to allow recipients to work on the file(s) that you are sending, including uploading a new version, click **Enable collaboration**.
10. Click **Send**.

Send larger files

This feature is only available if enabled by your organization administrator. When enabled, use this method to attach, protect, and share files of over 25MB.

1. Open a new email and enter a recipient.
2. In the **Message** tab in your mail editor toolbar, click **Attach Large Files** .
3. Browse to and select your large file.
4. Change the default email security permissions if desired. For more information, see Sending smaller files.
5. Click **Send**.

About collaboration

Collaborate on files you send via Microsoft Outlook with Workspaces for Windows.

When sharing files, click **Enable collaboration** to collaborate with others. Your recipients can edit the file (if granted the necessary permissions) and share the new version with all recipients, and you can monitor activity on sent files by opening the File activity panel in Outlook.

After you click **Send**, your recipients can collaborate on the file in the following ways:

- Annotate and edit the file online with the online viewer or in Office online
- Download the file and make changes locally, and then attach and protect the file in a reply to the original message; the changes are saved to Workspaces
- Upload a new version to the received file in their Workspaces Web Application Inbox

You can collaborate on the file in the following ways:

- Add recipients to the sent file via Workspaces Web Application, which means that you are expanding the group of people who can work on the file.
- Create a new email with the same attachment in Outlook or send a copy of the file via Workspaces Web Application to create a separate version of the file for collaboration with a different person or group of people.

Any activity on the file appears in the Workspaces File Activities panel for the selected email. Use the context menus to download or view the latest version of the file.

Tip: For more information on how collaboration is handled in Workspaces Web Application, refer to the Workspaces Web Application User Guide.

Collaborate on files

This task describes the workflow for collaborating on shared files. Follow the instructions to send back an edited shared file via Microsoft Outlook that was sent to you with collaboration enabled.

1. Click **Reply** or **Reply All** to the email you received with the shared file.
2. Attach your updated version of the file. Ensure that the filename is identical to that of the original shared file.
3. Protect the attachment with Workspaces. For instructions, refer to Send smaller files if necessary.
4. Click **Send**.

The file is uploaded to Workspaces as a new version of the original shared file. Your recipients can access the file and collaborate on the file.

For more information on collaboration, see About collaboration.

Track activities on the file, for more information see Track collaboration.

Track collaboration

Open the Workspaces **File Activities** panel to track actions performed on files you have sent with collaboration enabled.

1. In Outlook, select the mail that you have sent or received where collaboration is enabled.
2. In the **Home** ribbon, click **File Activities**.
   The File Activities panel appears with details of activities performed on the file.
3. To view the latest version of the file, click **View** under any of the file activities.
4. To download the latest version of the file, click **Download** under any of the file activities.
5. Where the list of activities is clipped, for example where there is more than one attachment, click **More** to view all activities.

Contacting Support

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If you encounter a problem, you can:

- Access the Help Center to browse the Workspaces Support portal for help
- Report an issue to generate log files to send to Support

Access the Help Center

Right-click the Workspaces icon in the taskbar, and select **Help** > **Help Center**.
The online support portal opens, where you can browse for help.

Report an issue

1. Right-click the Workspaces icon in the taskbar, and select **Help** > **Report an issue**.
   An email opens addressed to Workspaces Support.
2. Verify that your correct email address is displayed.
3. Enter a description of the issue in the **Description** box.
4. Click **Choose file** to add screenshots of up to 3MB per file, as desired.
5. Do one of the following:
   - Click **Send** to generate log files and to open a mail in your default mail application to report the issue. Send the mail in the usual way.
   - Click **Save** to generate log files and save them for later. Save the log files in the usual way.

About user roles, sharing, collaboration and permissions

8

Security, sharing, collaboration, and recipient sign in within BlackBerry 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 BlackBerry 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 four standard roles with pre-defined capabilities. Organizations that are configured for creating custom roles can offer additional roles with unique capabilities.

The standard roles are described here:

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.

Group Manager

Workspace administrators can add or define any group member as group manager. Managers can add and remove members to the group, but do not have any additional capabilities.

Contributors

Contributors perform the following actions:

- Folder level: Add and delete folders, move files across folders. Full access, download protected, copy link, move, and rename folders.
- File level: Add and remove files, view online, download originals for files uploads, print, download protected 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 BlackBerry Workspaces administrator, and according to your organization's defined enterprise mode.

Available permission sets

Full access

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

Advanced rights management

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

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

	Full access	Download Protected	View online	Copy	Edit	Print	Programmatic access
Download protected, edit, copy & print	-	Yes	Yes	Yes	Yes	Yes	-
Download protected, edit & print	-	Yes	Yes	-	Yes	Yes	-

Download protected & edit	-	Yes	Yes	-	Yes	-	-
Download protected & print	-	Yes	Yes	-	-	Yes	-
Download protected	-	Yes	Yes	-	-	-	-

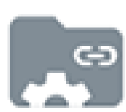
Online only

	Full access	Download Protected	View online	Copy	Edit	Print	Programmatic access
View & print	-	-	Yes	-	-	Yes	-
View	-	-	Yes	-	-	-	-
Spotlight view	-	-	Spotlight view only (blurred outside of subject area to block over the shoulder viewing)	-	-	-	-
No access	-	-	-	-	-	-	-

About customizing access to folders or files

Entities (individuals, groups, or members of an email domain) can access workspace folders and files, based on the permissions you selected.

Permissions can be adjusted by applying different permission levels. When adding new entities, you can also select if you want to give them access to all workspace folders and subfolders or to add them only to the selected item and any subitems that inherit permissions.

If you choose to allow only certain entities 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 choose to only give permissions to a folder and subitems that inherit permissions, this will break inheritance for the folder, and for all child items as well. All subfolders or files under that folder, will inherit the permissions set for that folder.

If you choose to give permissions to a folder and all subitems, this will override broken inheritance for the folder all subfolders and child items.

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 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 Send a Protected File and Workspaces Email Security windows.

Select **Require recipients to sign in** to require recipients of files sent by Workspaces to sign in to Workspaces to receive the file. When the checkbox is selected, the **Manage recipient permissions** link is displayed in the Send a Protected File window. Click **Manage recipient 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, recipients 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 according to the user email when the user is signed in 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 via the Workspaces Web Application.

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