



Intralinks VIA[®] Pro for iPad and iPhone

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See Intralinks login page for other national numbers

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Welcome to Intralinks VIA[®] Pro for iPad and iPhone

Intralinks VIA Pro for iPad and iPhone makes it easy for you to view and update your Workspaces. Read this guide to get acquainted with the key tasks that you can perform with the Intralinks VIA Pro app.

Important! Intralinks gives Intralinks VIA Pro administrators the flexibility to determine how individuals in their organizations can use Intralinks VIA Pro. Depending upon the policies set by your organization's Intralinks VIA Pro administrators, some of the functions described in this guide may not be available to you.

Getting started

Requirements: In order to use Intralinks VIA Pro for iPad and iPhone, you must have one of the following devices:

- iPad 2, iPad 3, iPad 4, iPad Mini
- iPhone (optimized for iPhone 5)

iOS 8.0 or later is required.

Installing the Intralinks VIA Pro app

1. Using your iPad or iPhone, launch the App Store.
2. Search for **Intralinks VIA**. A listing for the Intralinks VIA Pro app appears.
3. Tap the listing. A page describing the app appears.
4. Read the information provided, then tap the **Get** button. The **Get** button is replaced by an **Install** button.
5. Tap the **Install** button. Enter your Apple ID password when asked to do so. The installation process begins, and in a few moments an icon for Intralinks VIA Pro appears on your device's Home screen.

Activating your Intralinks account

If you are a new user to Intralinks, that is, you have not activated an Intralinks account, when you are invited to VIA Pro, you will receive an email message from Intralinks with a link to activate your account.

1. In the email, tap **Activate Account**.
2. Read the license agreement and tap **Accept** to continue logging in.
3. Enter then reenter your password/passphrase and tap **Next**.
4. Set up how you want Intralinks to verify your identity by setting up one or more of the following options:
 - **Receive a code by text (SMS)** - Select the country and enter the phone number to which you want an SMS code to be sent and tap **Activate**.
 - **Use Intralinks Authenticator** – Use your phone to scan the QR code or enter the secret key displayed in this dialog box in the Authenticator section in the Intralinks Mobile app on your phone. Click the icon at the end of the secret code to copy the code. In the **Verification code** field, enter the 6-digit code generated by the app and tap **Activate**.

Note: this option cannot be used with Okta Verify with Push.

- **Okta Verify with Push** - Okta Verify with Push eliminates the need to enter a code. Instead, it sends a push

verification to your phone and you must tap Yes, it's me to authenticate. Use your phone to select the type of account and scan the QR code in this dialog box in the Okta Verify App on your phone.

This option requires that your phone be connected to the internet. If your phone does not have an internet connection, you can choose to verify using a code and you will be enrolled in Okta Verify.

Note: This option cannot be used with Intralinks Authenticator.

- **Use your preferred authenticator** - Scan the QR code or enter the secret key displayed in this dialog box in the Authenticator App on your phone. Tap the icon at the end of the secret code to copy the code. In the **Verification code** field, enter the 6-digit code generated by the app and tap **Activate**.

Note: If Intralinks Authenticator has already been configured you will not be able to configure Okta Verify until you disable Intralinks Authenticator.

5. When you are done, tap **Finish**.

Logging in after you have activated your account

The first time that you start Intralinks VIA Pro, your iPad or iPhone must be connected to the Internet. After you have set up a passcode (described in the next section), you can use the passcode to log in quickly. If your iOS device has Touch ID capability, you also can use Touch ID to log in.



The Intralinks VIA Pro icon.

1. Tap the **Intralinks VIA Pro** icon to start the app.
2. Enter your email address and tap **Next**.

If your organization uses Single Sign-On (SSO), and you have not signed into your organization's network, you will be redirected to your company's sign-on page, otherwise, the app will open.

3. Enter your password/passphrase and tap **Login**.
4. If you are asked to verify your identity, either enter the security code in the **Verification Code** field and click **Next**, or tap **Yes, it's me** in your Okta Verify app. The security code is sent based on the method you selected when you activated your account.

The security verification is triggered based on the result of evaluating security behavior and risk-based authentication, referred to as adaptive authentication. Security behavior detection continually tracks specific user behavior and generates a challenge when any change in the tracked history of behavior for a given user is detected, such as a new device that has never been used or a new geographic location from which the user has never logged in to Intralinks.

Risk-based authentication is an additional layer of security that evaluates risk automatically using multiple features such as IP address, device, and behaviors for each user attempting to authenticate. Risk-based authentication is done with security behavior detection.

After you have logged in, create a six-digit passcode to speed your login. If your device supports Touch ID, you can set that up, as well.

Using a passcode to log in

When you log in the first time, a message appears instructing you to create a six-digit passcode. In the future, you will use this passcode instead of your email address and password when you log in. This passcode is required. Note:

Your passcode will be invalidated if you enter it incorrectly more than three times. You will have to enter your email address and password again; you will have the opportunity to enter a new passcode after you log in.

You can enter a new passcode at any time. For more details, see “Changing your password/passphrase” on page 10.

Using Touch ID to log in

If your iOS device has Touch ID capability, you can use it instead of your passcode to log in quickly.

If you have not set up Touch ID on your device yet, you can do so by opening Apple’s Settings app, then tapping **Touch ID & Passcode**. Follow the instructions on the screen to enroll your fingerprint.

To begin using Touch ID, tap the Settings icon (**E**) in the Intralinks VIA Pro app, then tap **Manage Touch ID**. On the screen that appears, slide the **Touch ID** switch to the right. A message will appear asking you to confirm your action; tap **Enable**. The next time you open the Intralinks VIA Pro app, you will be able to log in by placing your finger on your device’s Home button.

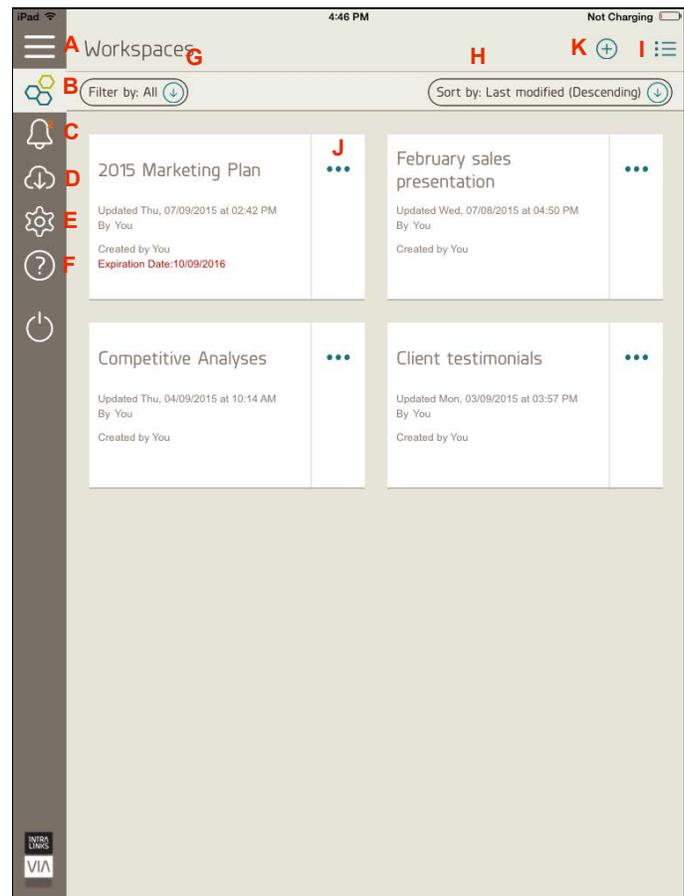
Important! Anyone whose fingerprint is enrolled on your device will be able to log into Intralinks VIA Pro and view or change the contents of your Workspaces. If you share your device with a colleague or family member who uses Touch ID, you may wish to continue using a passcode to log into Intralinks VIA Pro.

Getting around

You will spend most of your time working with Workspaces that you have created or have been invited to use. At times, though, you may need to view notifications about changes that affect your Workspaces or change the settings you selected for Intralinks VIA Pro.

On an iPad, you can use the row of icons along the left side of the Intralinks VIA Pro screen to display notifications (**C**), files that you have downloaded (**D**), settings screens (**E**), help tools (**F**), and to return to your Workspaces (**B**). If you tap the menu icon (**A**), a menu will slide out, displaying the names of the icons. This is helpful if you forget what the icons are used for, but it is optional. When you are familiar with the icons, you can tap the icon to view the screen you want.

On an iPhone, tap the menu icon (**A**) to display these options.



Your Workspaces and the tools you will use to navigate the app.

Getting help

If you would like to view a short video tutorial or get help from the Intralinks customer service team, tap the Help icon (F). Options for viewing the demo video, sending an email or chatting with a customer service representative will appear.

Viewing your Intralinks VIA Pro Workspaces

If you have many Workspaces, you can filter and sort them to find the Workspaces that you want to use. You also can display the Workspaces either as a list or as cards.

To change the filter being used, tap the **Filter by** field (G). A menu appears with the following options:

- **All** – Select this option to view all of the Workspaces that you currently have access to.
- **Owned** – Select this option to view all the Workspaces for which you are a Workspace owner. These are Workspaces that you created, along with Workspaces created by other people who have made you an owner, as well.
- **Shared with you** – Select this option to view Workspaces created by other people.
- **Expired** – Select this option to view all the Workspaces for which you are an owner that have expired. (You cannot view expired Workspaces for which you were a viewer or editor.)

To change the sorting order of the Workspaces that are currently displayed, tap the **Sort by** field (H). The following options appear:

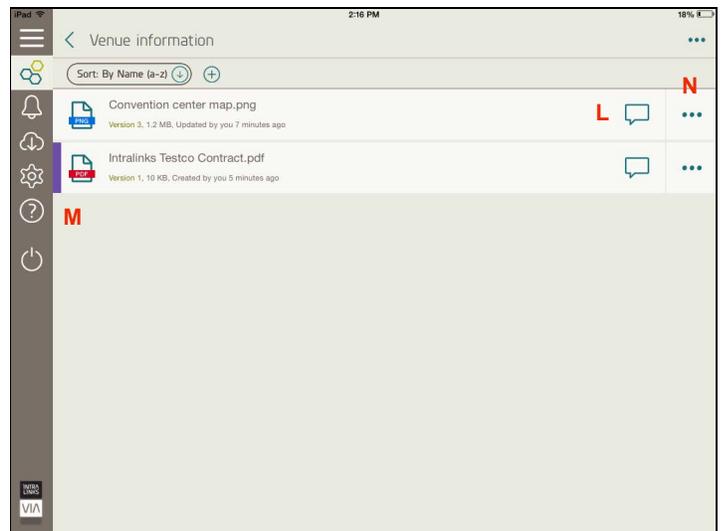
- **Name (A-Z)** – The list will be sorted by name, and Acme will appear at the top of the list. Zebulon will appear at the bottom of the list. (Workspaces whose names begin with numbers will appear at the very top of the list, before those with alphabetic names.)
- **Name (Z-A)** – The list will be sorted by name, and Zebulon will appear at the top of the list, before Acme. (Workspaces whose names begin with numbers will appear at the bottom of the list, after all the Workspaces with alphabetic names.)
- **Last modified (Descending)** – The most recently updated Workspaces will appear at the top of the list.
- **Last modified (Ascending)** – Workspaces that have not been updated recently will appear at the top of the list, ahead of more recently updated Workspaces.

You also have the option to change the way the selected Workspaces are displayed. Tap the icon in the upper right corner of the screen (I) to switch between a list view and a card view. The same information is displayed regardless of your selection.

When you have located the Workspace you want, tap it to view its contents.

Viewing Workspace details

To view the **Details** screen for a Workspace, tap the ellipsis icon (J) next to the Workspace name. You can view the date the Workspace was last updated; you can view whether IRM protection and an expiration date has been set for the Workspace; you can choose to leave the Workspace; and you can view a list of people who are using the Workspace.



Documents within a Workspace.

When you have finished viewing the Workspace details, tap the Close icon in the upper right corner of the screen. The Workspaces screen will reappear.

Viewing files

To open a file within a Workspace, tap on the file's name.

Depending upon how your Workspace is set up, you also may be able to view unprotected files in other compatible applications such as GoodReader, Evernote or iBooks. To do this, tap the Open In icon (O) to display a list of applications that can be used to open the file.

Edited: Note that the IntraLinks VIA Pro app is intended only for viewing files. If you make changes to a file using another application and you want to upload the edited file to a Workspace, you must use IntraLinks VIA Pro for the Web on a laptop or desktop computer. You cannot use Safari on your iPad or iPhone to make changes to Workspaces.

Viewing protected files

Some of the files in your Workspaces might be protected and cannot be printed, downloaded or opened in other apps. Watermarks are displayed on protected files when they are viewed by Workspace participants or screen shots are made of them. Watermarks do not appear when the Workspace owner views the documents.

Workspace owners determine whether to protect documents. If you see a purple bar (M) next to a Workspace or folder, all of the Office and PDF files in the Workspace or folder are protected. Other types of files are not protected.

Viewing and adding comments to files

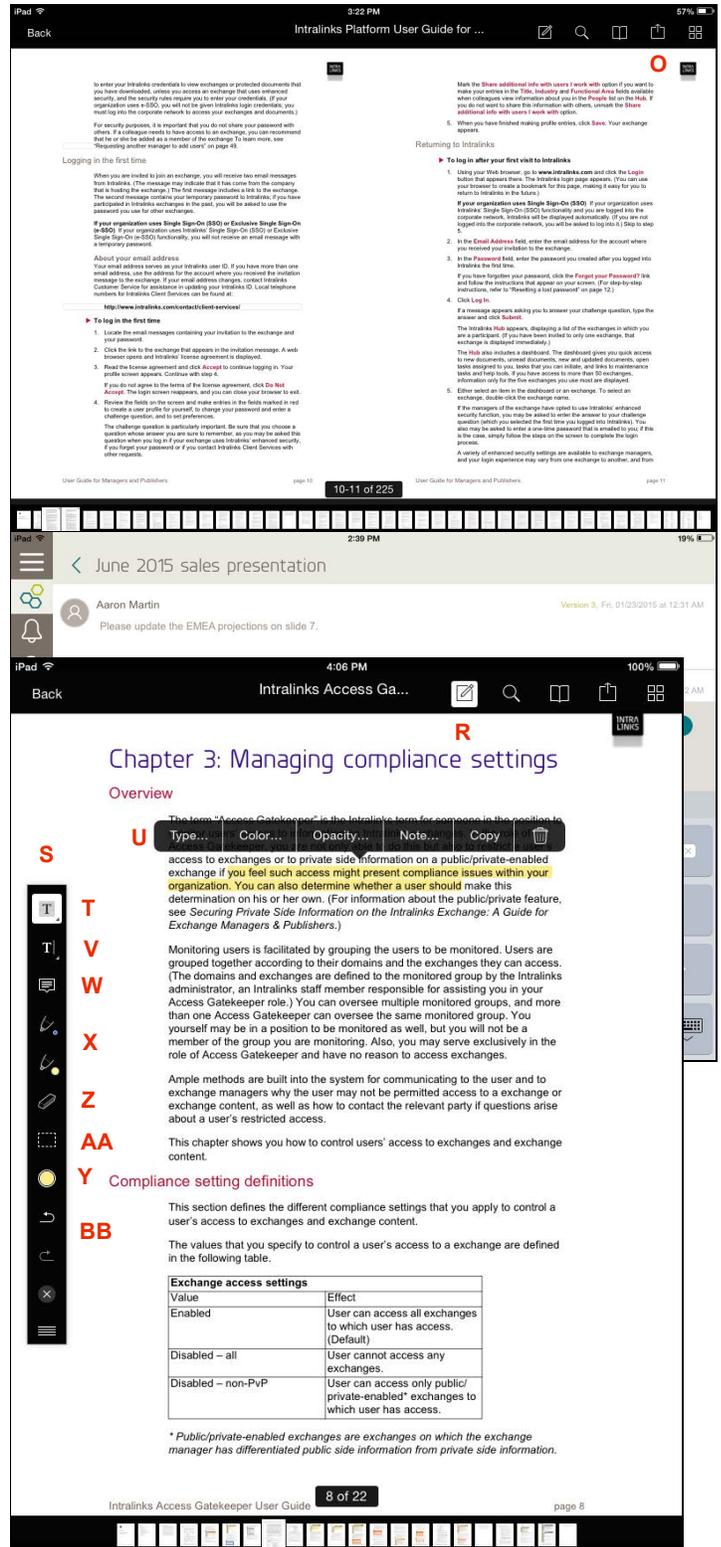
To view or add comments about a file in a Workspace, tap the Comments icon (L) at the right of the file name. If the file is open, the Comments icon appears in the upper right corner of the screen. The Comments screen appears, listing previously added comments.

To add a comment, tap the box at the bottom of the screen (P). The keyboard appears. When you have finished your comment, tap Post (Q) to add it.

Annotating PDF files

While you are viewing PDF files, you can add notes, highlight text and add other editing changes using IntraLinks VIA Pro's annotation tools. If you are a Workspace owner, you can annotate any PDF file. If you are an editor or a viewer, you can annotate unprotected PDF files only.

Your first and last name will be added to each of your annotations. When you finish making annotations and close the file, the changes are uploaded to the Workspace, and the annotations will be visible to everyone who is allowed to view the file. Annotations can be edited, moved and deleted by others. The name of any person who modifies an annotation is attached to the annotation.



Annotation tools.

To annotate a PDF file, tap the file to open it, and then tap the Annotation icon (R) to display a toolbar (S) with annotation options.

You can use the following tools:

- Highlight/Underline/Strikethrough (T) – Tap this tool and then drag your finger over the text you wish to highlight. To underline or strike through the text, tap it. A toolbar (U) appears. Tap **Type** and select the option you want. You can use the toolbar to change the color and opacity of the highlight, add a note, and copy your changes. You also can select the tool you want by placing your finger over the icon in the Annotation toolbar and pressing until the options appear.
- Free text/Signature (V) – Tap this tool to place text directly on the page; the text will not appear in a note box. To add a signature, place your finger over the icon in the Annotation toolbar and press until the options appear; select the pen icon. You have the option to add a standard signature (“My Signature”) or a custom signature. The first time you select My Signature, you will be asked to draw your signature. After that, you can tap the signature to place it in the document. Each time you select Custom Signature, you must draw the signature again; no copy of the signature is kept for you.
- Notes (W) – Notes appear within a Note box, which is closed until you tap the icon associated with it. You can change the color of the note box and icon, and the shape of the icon, by tapping **Edit** in the Note box.
- Pens (X) – Two pen tools allow you to make freehand drawings. You can use the Ink tool (Y) to change the color, width and opacity of the lines made by the pen tools.

You can use the Eraser tool (Z) to erase lines made with the Pen tools. You can use the Marquee tool (AA) to select a number of annotations; you can then move them or delete them. The Undo and Redo tools (BB) allow you to undo your actions or redo them if you change your mind.

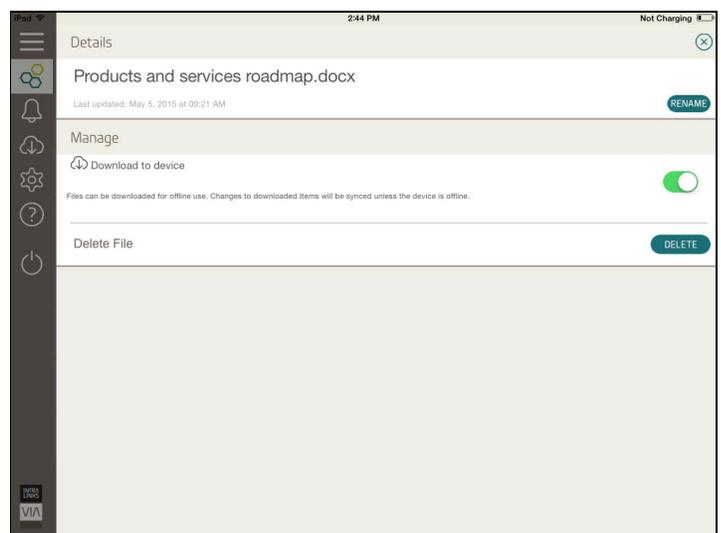
Viewing files when your device is offline

Note: Depending upon the policies set by your organization’s Intralinks VIA Pro administrators, this capability may not be available to you.

You can download important files for viewing when your iPad or iPhone is unable to connect to the Internet or mobile network. To download a file for offline viewing, tap the ellipsis icon (N) next to the file’s name. On the screen that appears, slide the **Download to device** switch to the right. (Note that IRM-protected files cannot be downloaded for offline use.)

Important! Be aware that downloaded files are updated automatically if changes are made to the original versions. If your device has a data plan, updates may consume a significant amount of its data usage allotment. If this is a concern, you may want to limit the number of files that you download for offline use and perform downloads only when your device is connected to a wireless network.

To view the files that you have downloaded, tap the Download icon to display the **Downloads** screen. Tap on the file you want to view. To remove a downloaded file, tap the **Remove** button next to it. (The original file on the Workspace will not be affected in any way if you remove your downloaded copy.)



The Details screen for a file that is marked for offline use.

If changes are made to the original file in the Workspace, the downloaded copy will be updated; if your device is offline when the changes are made, the downloaded copies will be updated when your device is online again.

Adding Workspace files to an Intralinks exchange

If you are using an iPad and the Intralinks app is installed on it, you can copy files from Workspaces to Intralinks exchanges. To do this, open the file and tap the Open In icon (◻), then tap **Open** to display the Intralinks icon; tap the icon. The Intralinks app will open. Log in and then select the exchange and folder where the file will appear.

Adding files to a Workspace from another app

You can add files, including photos in your photo library, from other iOS apps to Intralinks VIA Pro Workspaces using the Open In icon. Files can be viewed using Intralinks VIA Pro only if they have been added to a Workspace. Photos must be added one at a time.

If you choose to receive notifications from Intralinks VIA Pro, notifications about added files will appear on your device's Notifications screen. They also will be included in the number on the badge on the Intralinks VIA Pro icon that indicates the number of notifications that have been received since you last opened Intralinks VIA Pro.

You can use Microsoft Office and iWorks to open files that are stored in an Intralinks VIA Pro Workspace and files that you have downloaded for offline use. You can edit the files and then save them back to Intralinks VIA Pro. Files that you have changed in Office or iWorks will be added as new files in Intralinks VIA Pro; they will not appear as new versions of the existing files.

Viewing, adding and removing participants in a Workspace or folder

Tap the ellipsis icon (⋮) next to the Workspace or folder name. A list of people who are using the Workspace is displayed, along with other Workspace details.

If you are a Workspace owner, you can add people to the Workspace or folder. Tap the Add People icon (👤); the **Share Workspace** screen or **Share Folder** screen appears. Enter or select the addresses of the people you want to add. Place a comma (,) or semicolon (;) between names. To add a person from your device's Contacts list, tap the (+) icon next to the **Email address** field and select the person you want from the list that appears. Select a role for them. Note that everyone will be assigned the role you select. If you want to assign multiple roles, you must repeat these steps for each role. You can include a message in the invitation alert that will be sent to the new participants; tap the **Message** icon and type your message. Tap **Add** to add the new participants and send invitation alerts to them.

If you are a Workspace owner, you can remove a participant's access to the Workspace by tapping the **Delete** link next to the person's name.

Viewing notifications

You are notified whenever you are invited to a Workspace or another Workspace participant makes a change to a Workspace that you have created or already participate in. Tap the bell icon (🔔) on the left side of the screen to see your notifications. The newest notifications are at the top of the list. Tap a notification to see the document, comment or other item that was added or updated.

Creating folders

If you are a Workspace owner or editor, you can create folders within your Workspaces. To create a folder, tap the **Add Folder** icon (+) at the top of the screen. The **Add Folder** screen appears. Name the folder, then tap **Add**.

The new, empty folder opens automatically. You can create additional folders inside it if you like.

Renaming files and folders

If you are a Workspace owner or editor, you can rename files and folders within your Workspace.

Tap the ellipsis icon (⋮) next to the file or folder name to display the quick action menu. Tap the **Rename** icon. A popup window appears. Enter the new name, then tap **Save**.

Deleting files and folders

If you are a Workspace owner, you can delete any file within your Workspace. If you are an editor, you can delete any file that you have added to the Workspace.

Tap the ellipsis icon (⋮) next to the file or folder name to display the quick action menu. Tap the **Delete** icon. A popup window appears asking you to confirm your choice. Tap **Delete**.

Adding a Workspace

To create a new Workspace, display the **Workspaces** screen and tap the **Add Workspace** icon (+ (K)). The **Add Workspace** screen appears. Enter a name for the Workspace. You can add a description of the Workspace, as well, if you want.

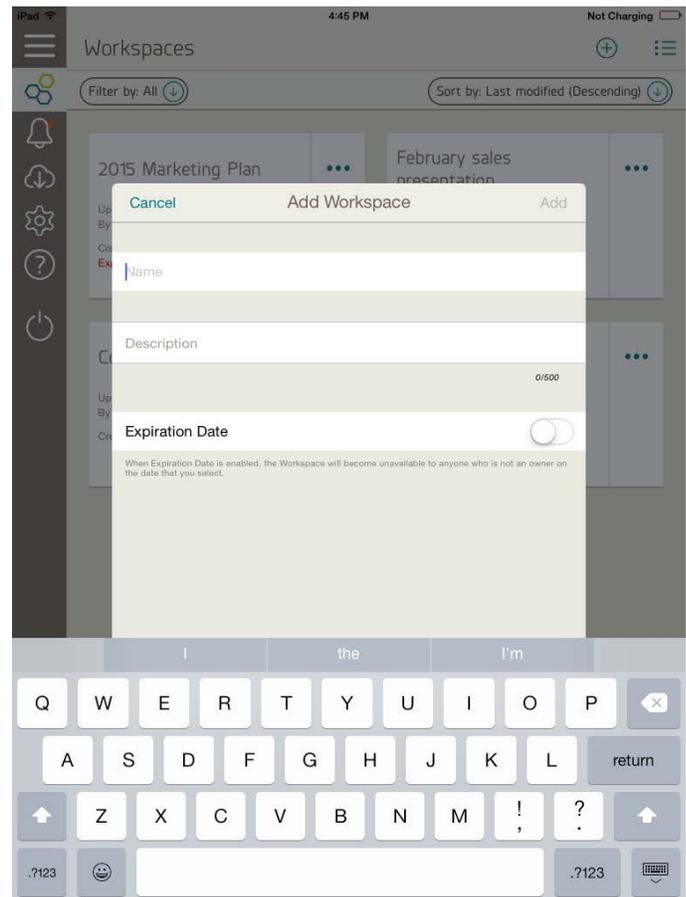
If you want to limit the amount of time that a Workspace is available, slide the **Expiration Date** switch to the right, then select the last date on which the Workspace will be available.

Note: Depending upon the policies set by your organization's Intralinks VIA Pro administrators, an expiration date may be required.

When you have finished making entries, tap **Add** to create the Workspace. You can begin adding folders and files and inviting people to use the new Workspace.

Deleting a Workspace

Tap the ellipsis icon (⋮) next to the Workspace name. A quick action menu appears. Tap the **Delete** icon. A message appears asking you to confirm your choice. Tap **Delete**.



The Add Workspace screen.

Removing yourself from a Workspace

If you are an editor or viewer, you can remove yourself from a Workspace that you have been invited to if you no longer need access to it and do not plan to contribute to it any longer.

On the **Workspaces** screen, tap the ellipsis icon  next to the Workspace name. If you are an editor, tap the **Details** icon. The **Details** screen appears. Locate your name in the **Shared With** area of the screen and tap the **Leave** link. A message will appear asking you to confirm your choice. You have the option to include a note to the Workspace owner explaining why you are leaving the Workspace.

Changing your password/passphrase

You can change your Intralinks password/passphrase using the Intralinks VIA Pro app. Keep in mind that your new password/passphrase will be required for all Intralinks services that you use. Be sure that you remember the new password/passphrase.

On the **Account Settings** screen, tap **Change Password**. The **Change Password** screen appears; enter your new password and then tap **Save**.

Logging out of Intralinks VIA Pro

When you have finished working with Intralinks VIA Pro, tap on the Logout icon  at the bottom of the navigation bar on the left side of the screen. If you are using an iPhone, tap the menu icon  to display the logout icon.