Intralinks VIA® Pro for the Web

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See Intralinks login page for other national numbers

Welcome to Intralinks VIA® Pro for the Web

Using Intralinks VIA Pro, you can sync, share, collaborate and manage business content wherever and whenever you need it. You can use the tools you are already using in your day-to-day life (email, desktop, mobile) to work with colleagues; Intralinks VIA Pro extends your tools, giving you lifetime content control beyond the firewall.

Read this guide to get acquainted with the key tasks that you can perform with Intralinks VIA Pro.

Important! Intralinks gives Intralinks VIA Pro administrators the flexibility to determine how people 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.

If you have been using Intralinks VIA Pro for some time, you may have Workspaces that were created using earlier versions of Intralinks VIA Pro. You can continue to use these Workspaces, but note that they do not have all the features of Workspaces created in the current version of Intralinks VIA Pro. For example, older Workspaces can have only one owner, while newer Workspaces may have multiple owners. Whenever you display a Workspace that does not have all the capabilities of newer Workspaces, a message will appear at the top of the screen to alert you. You can perform all the tasks in the Workspace that you performed using the previous version of Intralinks VIA Pro. Also note that files that you placed in Intralinks VIA Pro Drive now are located in a Workspace.

Getting started

Requirements: In order to use Intralinks VIA Pro for the Web, you must have one of the following browsers:

- Google Chrome (latest version, automatically installed by Google if you use Chrome)
- Firefox (latest version)
- Safari 6.1 or later (Macintosh only)
- Microsoft Edge (latest version)

For an optimal viewing experience, we recommend that you use Chrome or Firefox on Windows, and Chrome, Firefox or Safari on Macintosh. In order to drag and drop files, you must use a browser that supports HTML5; dragging and dropping and editing do not work with Internet Explorer 8 or 9.

In order to view downloaded IRM-protected documents, you must have Adobe Reader® 10 or greater.

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, click **Activate Account**.
2. Read the license agreement and click **Accept** to continue logging in.
3. Enter, then reenter your password and click **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 click **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 you 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. 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**.

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

Logging in after you have activated your account

To display the log in screen, point your browser to: https://via.Intralinks.com.

If your organization uses Single Sign-On (SSO): If your organization uses Intralinks' Single Sign-On (SSO) functionality, you will have the option to log in through your corporate network, rather than Intralinks, when you display the Intralinks login page. If you are already logged into the corporate network, Intralinks VIA Pro will be displayed automatically when you point your browser to:
https://via.intralinks.com.

If you use other Intralinks services, you can use your email address and password for those services to log into Intralinks VIA Pro. You will be able to contribute only to existing Workspaces, however. You will not be able to create new Workspaces of your own unless you subscribe to Intralinks VIA Pro.

1. Enter your email address and click **Next**.
2. Enter your password and click **Login**.
3. 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.

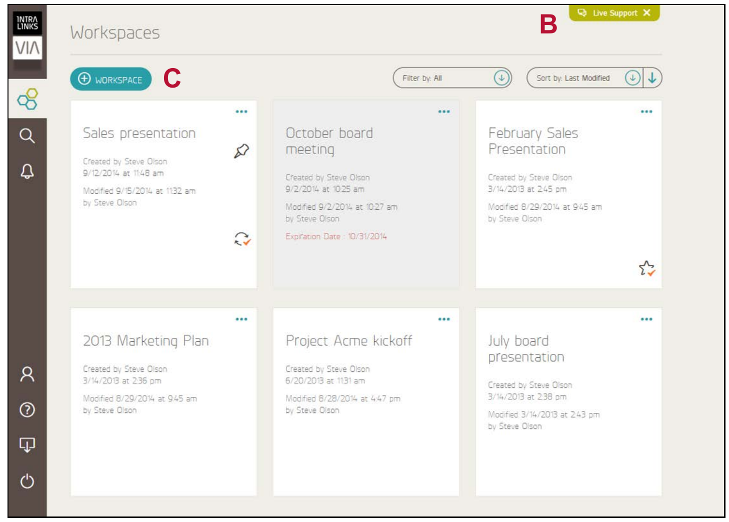
   The security verification is triggered based on the result of evaluating security behavior and risk-based authentication, referred to as adaptive authentication. Security behavior detection continually tracks specific user behavior and generates a challenge when any change in the tracked history of behavior 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.

4. Your existing Intralinks VIA Pro Workspaces appear in the **Workspaces** view. (When you log in the first time, you may not have any Workspaces.)

You can update your password and other personal information at any time. For more information, see “Your personal profile” on page 17.

Also note the **Live Support** link (**B**) at the top of the screen. If you encounter problems using Intralinks VIA Pro, click this link to start a chat session with an Intralinks client support specialist — we’re here to help. For more information, see “Getting help with Intralinks VIA Pro” on page 18.



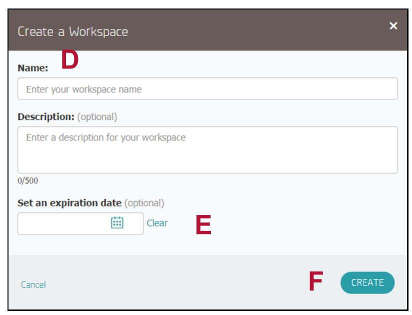
*The **Workspaces** screen.*

Using Workspaces

Workspaces are your collaboration projects in Intralinks VIA Pro. For each Workspace, you need to select one or more files to work on, along with the people who will work on them.

Creating a Workspace

The **Workspaces** view should be displayed.



*The **Create a Workspace** screen.*

1. Click the **Workspace** button (**C**) to open the **Create a Workspace** screen.

2. Enter a name and description for the Workspace (**D**). Make sure that it clearly describes your task.

3. If you want to limit the amount of time that a Workspace is available, click in the **Set an expiration date** field (**E**). A calendar widget will appear. Either enter or 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.

   As the Workspace owner, you can continue to view Workspaces that have expired, but you will not be able to change them or make them active again. If you make other people owners of the Workspace, they will be able to view the expired Workspace, as well. The viewers and editors you have invited to the Workspaces can no longer see them after they have expired.

   You can expire or delete a Workspace at any time, regardless of your entries here. You also can change the expiration date later if necessary. For more information, see “Expiring and deleting Workspaces” on page 15 and “Setting or changing a Workspace’s expiration date” on page 15.

4. Click **Create** (**F**). An empty Workspace is created for you. Now you can add files and invite others to join the Workspace.

5. To add files from your computer or a network drive, click the **File** button (**G**), then select **From Computer** from the menu that appears. A dialog box appears, allowing you to select the files that you want.

You also can drag files from Windows Explorer to the Workspace. (Note that this requires a browser that supports HTML5. Dragging and dropping does not work with Internet Explorer 8 or 9.)

To add files from another Workspace, click the **File** button (**G**), then select **From Another Workspace** from the menu that appears. A screen appears allowing you to select the files that you want.

Important: When you add a file from another Workspace, a copy of the file is added. This copy is not updated automatically when changes are made to the original file. You will have to update the copy in this Workspace manually if changes are made to the original file.

To add files from an Intralinks Platform exchange, click the **File** button (**G**), then select **From Intralinks Exchange** from the menu. A screen appears allowing you to select the exchange that you want. (The option appears only if the Intralinks VIA Pro administrator has enabled it. It may not be available to you.) The name of the exchange that you selected will be visible to Workspace owners, but not to viewers or editors.

Important: When you add a file from an exchange to a Workspace, a copy of the file is added. This copy is not updated automatically when changes are made to the original file on the exchange. You will have to update the copy in the Workspace manually if changes are made to the original file.

If you add files from an exchange, a message will appear at the bottom of the screen to alert you that files are being copied. You can exit Intralinks VIA Pro before copying is complete; the files will continue to be copied.

You can select a combination of files from your computer, from other Workspaces, and from Intralinks Platform exchanges.

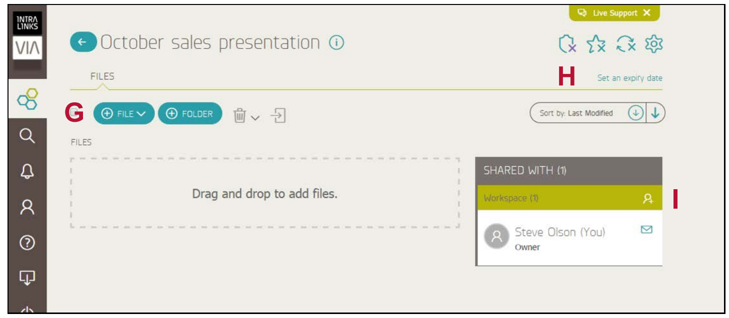
6. (Optional.) Mark the shield icon (**H**) to apply IRM (Information Rights Management) protection to all Microsoft Office and PDF files in the Workspace.

   IRM can be used to protect sensitive files from being distributed without your permission even if they have been downloaded. Protected files remain encrypted after they have been downloaded, and they can be viewed only by individuals who are authorized to use them. Individuals must enter their email address and Intralinks password before opening the files. You can unshare protected files even after they have been downloaded; when a file is unshared, previously authorized individuals will no longer have access to it.

   Word, PowerPoint, Excel and PDF files can be protected. The level or protection applied is **Protect/No Print** when protected files are opened in the Secure Viewer. When downloaded, the level of protection is **Protect/No Print** for viewers, and **Protect** for editors and owners.

   You can turn off IRM protection for the Workspace but turn it on for specific folders that contain sensitive files.

   Keep in mind that you lose control of files when they are downloaded from the Workspace unless they are IRM protected. When downloaded, files that do not have IRM protection can be freely distributed without your knowledge or consent.



A new Workspace with the File menu displayed.

Note: Depending upon the policies set by your organization's Intralinks VIA Pro administrators, you may be required to use Intralinks IRM protection.

Only Microsoft Office and PDF files can be protected. Other types of files cannot be protected, and they are not affected by your selection here.

7. (Optional.) To give other people access to the Workspace, click the Share Workspace icon (I) that appears at the top of the **Shared With** area of the screen. The **Share Workspace** screen appears.

   If you are not ready to start working with others on this Workspace yet, skip this step. You can add other people to the Workspace when you are ready to begin working on it.

8. In the **Email addresses** field, enter the email addresses for the people you want to work with. Place a semicolon (;) after each address.

   You can share individual folders with others, as well. This is useful if you want to share specific files, but not all the contents of the Workspace, with these people. For more information, see "Sharing folders" on page 10.

9. Choose a role for the invitees:

   Viewer – Viewers can read, download and comment on files, but they cannot edit or add files or perform other tasks. You can make viewers invisible to other viewers and editors by marking the **Make invisible to other people** option. (Viewers will remain visible to Workspace owners regardless of your selection.)

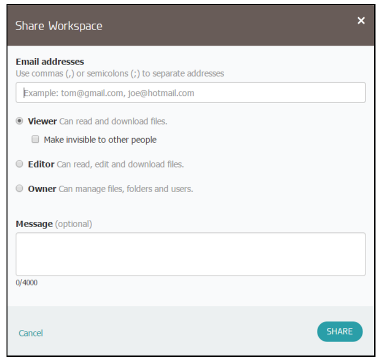
   Editor – Editors can read, download and comment on files. They also can edit and add files and folders.

   Owner – Workspace owners can manage files, folders and participants. Owners also can expire the Workspace and delete it when it is no longer needed. As the creator of the Workspace, you are assigned the owner role automatically. If you wish to share management tasks with others, you can make them owners, as well,

   (You can assign only one role to the people being invited to the Workspace. If you wish to assign multiple roles, complete this procedure for one role, and then repeat the procedure for the next role you want to add.)

10. (Optional.) Add a note that will appear on the invitation alert that will be sent to new Workspace participants.

11. Click **Share**. Invitations are emailed to all the participants you selected.



*The **Share Workspace** screen.*

Opening an existing Workspace

1. Open the **Workspaces** view by clicking the Workspaces icon in the navigation bar on the left side of the screen. All of your **Workspaces** are displayed in the Workspaces view.

2. Click on the Workspace to open it and display its details and contents.

You can sort your Workspaces using options in the **Sort by** menu. You can sort the list by the date you last modified the Workspace, the name of the person who created the Workspace, or the expiration date. To change the sort order (for example, from the oldest date first to the newest date first), click the arrow icon that appears to the right of the **Sort by** list.

To view a smaller list, you can select one of the options from the Filter by list:

- **All** — All the Workspaces that you have created or have been invited to are displayed.
- **Owned** — These are the Workspaces that you have created or for which you have been assigned the owner role.
- **Shared with you** — These are Workspaces created by other people; you have been invited to take part in them. All of the Workspaces in this view are active.
- **Favorites** — These are Workspaces that you have marked as favorites. To learn how to mark Workspaces as favorites, see “Marking Workspaces as favorites” on page 13.
- **Synced** — These are the Workspaces that you have chosen to sync. This option appears only if you have an Intralinks VIA Pro account that allows you to create Workspaces. To learn more about syncing Workspaces, see “Syncing Workspace content to your desktop” on page 16.
- **Expired** — These are Workspaces for which you are an owner and that have expired. You can view and change their contents, but invitees can no longer see them. This option appears only if you have an Intralinks VIA Pro account that allows you to create Workspaces.
- **Unpinned** — These are Workspaces that have not been pinned to any workboards. (Workboards are organizational tools that you can use to group related Workspaces.) When a Workspace is pinned to a workboard, it no longer appears in this view. To learn more about workboards, see “Creating a workboard” on page 13.

Sorting Workspace contents

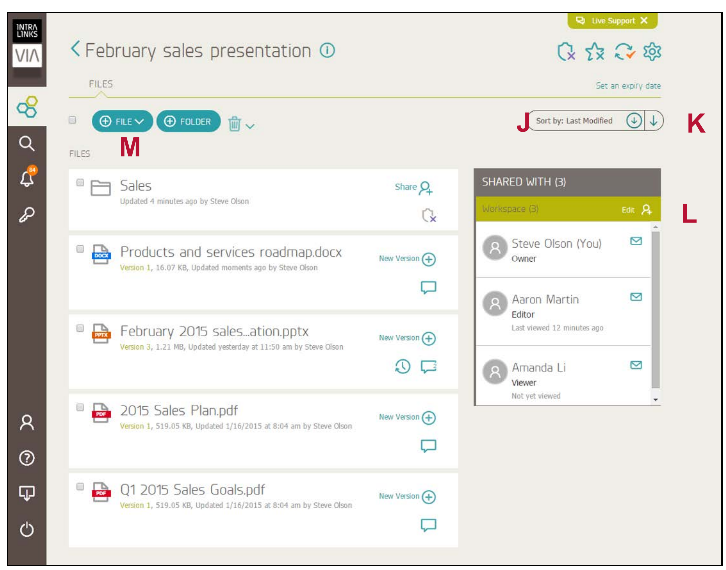
You can sort the contents of your Workspace. Select a sorting option from the **Sort by** list (**J**). To change the order in which the contents are sorted, click the arrow icon (**K**) to the right of the **Sort by** list. For example, if the list is sorted by the documents’ modified date, clicking the icon will change the order of the list from oldest to newest, or vice versa.

Adding people or files to a Workspace

You can update your Workspaces at any time. You can invite additional people and add files to the Workspaces that you have created. You can add files to Workspaces that you participate in, if the Workspaces are restricted. (Invitees cannot add files to public and confidential Workspaces.)

1. Open the Workspace that you want to update.
2. To add people, click the Share Workspace icon above the list of existing invitees (**L**).

   The **Share Workspace** screen appears, allowing you to enter email addresses for the people you want to add. Be sure to put a semicolon (;) or comma (,) after each address.



An existing Workspace.

3. To add files from your computer or a network drive, drag files from Windows Explorer to the Workspace. (Note that this requires a browser that supports HTML5. Dragging and dropping does not work with Internet Explorer 8 or 9.)

   Alternatively, click the **File** button (**M**) and select one of the following options:

   - **From Computer** — Use this option to select files on your computer or network drive.
   - **From a Workspace** — Use this option to select files that are in another Intralinks VIA Pro Workspace.

     Important: When you add a file from another Workspace, a copy of the file is added. This copy is not updated automatically when changes are made to the original file. You will have to update the copy in this Workspace manually if changes are made to the original file.
   - **From an Exchange** — Use this option to select files from an Intralinks Platform exchange.

     (The option appears only if the Intralinks VIA Pro administrator has enabled it. It may not be available to you.) The name of the exchange that you selected will be visible to Workspace owners, but not to viewers or editors.

     Important: When you add a file from an exchange to a Workspace, a copy of the file is added. This copy is not updated automatically when changes are made to the original file on the exchange. You will have to update the copy in the Workspace manually if changes are made to the original file.

     If you add files from an exchange, a message will appear at the bottom of the screen to alert you that files are being copied. You can exit Intralinks VIA Pro before copying is complete; the files will continue to be copied.

   A box appears, allowing you to select the files you want.

Your changes are saved as you make them.

You can select a combination of files from your computer, from other Workspaces, and from Intralinks Platform exchanges.

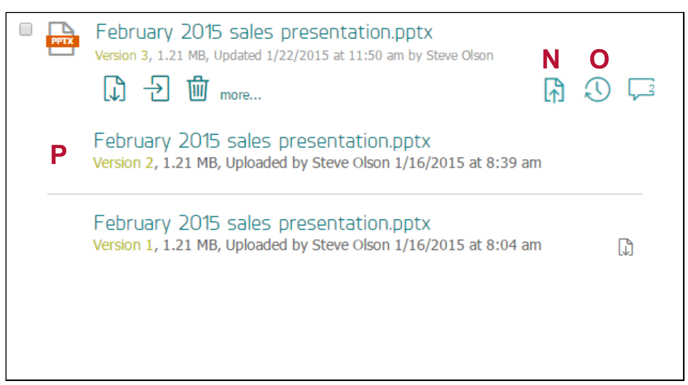
Updating files

If you are a Workspace owner or editor, you can replace a file with a newer version, or an altogether different file.

1. Click the **Upload New Version** icon (**N**) next to the file that you want to update. A dialog box appears.
2. Select the new version of the file, and click **Open**. The file is updated.

If the file has been updated, a new icon (**O**) appears. You and other Workspace participants can click the icon to view previous versions of the file. (Click the icon again to hide the previous versions.)

You can view previous versions of files by clicking on their names. To download a previous version, place your mouse pointer over the file name. A Download icon appears to the right of the file name. Click the icon to begin the download.



A file and its previous versions.

Viewing and downloading files

You can view any files attached to your Workspaces. If IRM protection has been applied to the Workspace or folder, you can view and download PDF and Microsoft Office files, but you will have to enter your email address and password to open downloaded copies.

The Workspace that contains the files that you want to view or download should be open.

- ◇ To download multiple files, click the box that appears to the left of each file. A Download icon will appear at the top of the screen; click it. If previous versions of the files exist, only the current version will be downloaded.
- ◇ To view an individual file, click the file's name (**P**).

  PDF and Microsoft Office files will be displayed in the Microsoft Office Web App, a secure Web-based file viewer. You also can view graphics files in JPEG, PNG and BMP formats online. Other types of files will be downloaded.
- ◇ To download an individual file, place the mouse over the file. A number of icons appear below the file's name. Click the Download icon . It appears first in the row of icons.

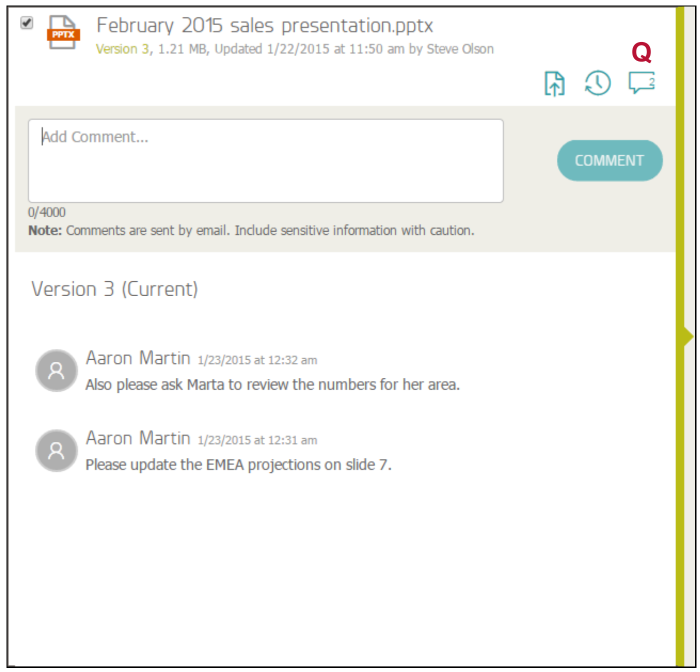
Commenting on files

You can add comments about files and view the comments made by others. The Comment icon (**Q**) indicates the number of comments that have been added for each file. Click this icon to view or hide comments, or to add your own comment.

Notice in the example that comments have been added for version 2 and version 3 of the file.

To add a comment, type the comment and click **Comment**.

Comments can be up to 4,000 characters long.



Comments about a file.

Editing downloaded IRM-protected files

Workspace owners and editors can make changes to Microsoft Office files they have downloaded even if they are IRM protected. After changes have been made, the Workspace owner or editor can update the existing file on the Workspace. The edited file also can be uploaded to another folder within the same Workspace, but only the individuals who were allowed to view the original file in its original location will be able to view the updated file in the new location.

Workspace owners on the original (source) Workspace can upload edited IRM-protected files to other Workspaces on which they are owners or editors. If IRM is not being used in the new location, the previously applied protections continue to apply to the file. Only individuals who were able to view the original file in its original location will be able to view it in the new location.

Editors on the original (source) Workspace can upload IRM-protected files to other Workspaces on which they are owners or editors if IRM is not being used in the new location.

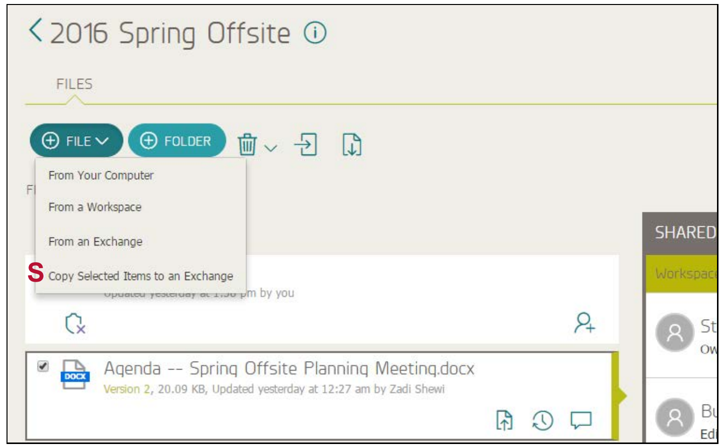
Viewers cannot edit or upload files, including IRM-protected files.

Copying files to Intralinks Platform exchanges

If you are a manager or publisher on an Intralinks Platform exchange, you can copy files from your Intralinks VIA Pro Workspace to the exchange. Select the files that you want to copy. Next, click the **File** button (**M**) and select the **Copy Selected Items to an Exchange** option (**S**) to display the **Select Destination Folder** screen. Use this screen to select a new location for the selected items.

Note: You can copy files only to exchanges that do not use custom fields. Only Workspace owners can copy files that are IRM protected to an exchange; in this case, the IRM protection is removed and new IRM protections may be applied automatically or manually in the new location.

Depending upon the policies set by your organization's Intralinks VIA Pro administrators, this feature may not be available to you.



The Copy Selected Items to an Exchange option.

Organizing files

If your Workspace contains many files, you can use folders to organize the files.

Creating folders

To create a folder, click the **Folder** button. A folder appears at the top of your list of files. Name the folder.

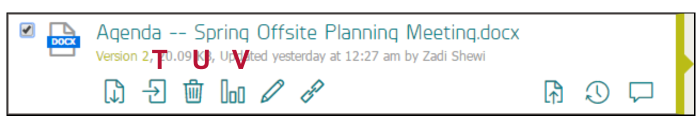
Click on the folder to open it. You can add files to the folder or create additional folders inside it if you like.

Moving files and folders within a Workspace

If you are a Workspace owner, you can move any file or folder in your Workspace. If you are an editor, you can move files only if you added them originally to the Workspace. Editors cannot move files that they updated but did not add originally. Viewers cannot move files or folders.

Select the files and folders that you want to move to a new location. Additional icons appear at the top of the screen. Click the Move icon (**T**) to display the **Select Destination Folder** screen. Use this screen to select a new location for the selected items.

Note: You can move files within a Workspace only. You can copy, but not move, files from one Workspace to another. When you copy files, only the current version is copied. Comments are not copied.



File icons.

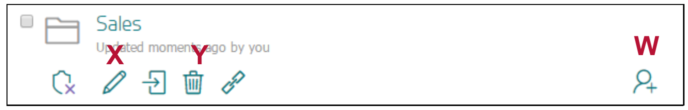
Sharing folders

You can share the contents of a folder with people who do not have access to the rest of the Workspace.

To share a folder, click the Share icon (**W**) next to the folder's name. The **Share Folder** screen appears. This screen is similar to the **Share Workspace** screen with one important difference: when you share a folder with others, you can make them viewers or editors, but not a Workspace owner. If you want to make someone a Workspace owner, you must use the **Share Workspace** screen to do so.

Renaming folders

To rename a folder, place your mouse cursor over the folder. A number of icons will appear; click the pencil icon (**X**). The current name is highlighted; type the new name. Click the check mark icon to save your change. If you are a Workspace owner, you can rename any folder in the Workspace.



Folder icons.

Deleting files and folders

You can delete files and folders that you have added to a Workspace, including those that you have added to Workspaces created by other people. In addition, if you are a Workspace owner, you can delete files and folders added by others to the Workspace. If you delete a file, both the current version and all previous versions of the file are removed. You cannot delete only a previous version of the file.

To delete a single file or folder, click the trash can icon (**U**, **Y**) that appears beneath the file's or folder's name.

To delete multiple files and folders, select them and then click the Trash icon at the top of the files list.

Restoring deleted files and folders

You can restore files that have been deleted from the Workspaces that you created. To restore deleted files, click the arrow that appears next to the trash can icon at the top of the files list. Select **View Trash Bin** from the menu that appears. The **Deleted Files** screen appears; select the files that you want and click **Restore**.

If you restore a deleted file, all previous versions of the file and any comments that were added for it are restored, as well. If you restore a file and the folder it originally appeared in has been deleted, the restored file will appear on the Workspace itself, not within a folder.

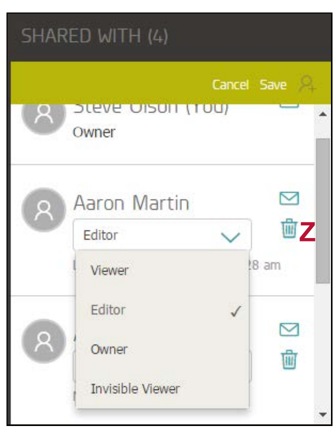
Viewing participant access information

If you are a Workspace owner, you can view information about the number of times each person has downloaded a particular file, as well as the date and time they most recently downloaded it. To view this information, place your mouse over the file, click **more...**, then click the File Access Report icon (**V**). After generating the report, you can download it in Microsoft Excel format by clicking **Export Report**.

Changing a participant's role

If you are a Workspace owner and you want to change another person's role (for example, you want to give a viewer editing privileges), you can do so easily.

1. Click the **Edit** link near the top of the **Shared With** panel. (If you have selected a folder, there are separate **Edit** links for the folder and for the Workspace as a whole.) The roles for all people except the person who created the Workspace become drop-down lists, and the **Edit** link is replaced with **Cancel** and **Save** links.
2. From the drop-down list, select one of these options:
   - **Viewer**



Options for changing a participant's role.

- **Editor**
- **Owner**
- **Invisible Viewer**

3. When you have finished, click **Save**.

Removing a participant from a Workspace or folder

You can remove individuals who no longer need access to the files in a Workspace or folder.

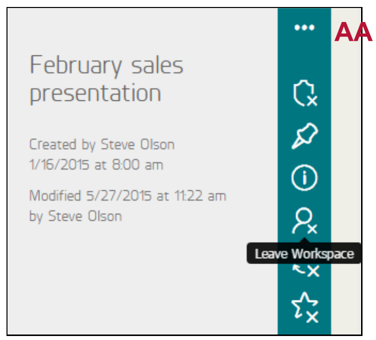
1. Click the **Edit** link above the person's name. (If you have selected a folder, there are separate **Edit** links for the folder and for the Workspace as a whole.)
2. Click the trash can icon (**Z**) next to the person's name.
3. Click **Save**.

The person will no longer see the Workspace or folder when he or she opens Intralinks VIA Pro. They also will not be able to view any protected files that he or she has downloaded.

Removing yourself from a Workspace

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.

1. Display the **Workspaces** view and click the ellipsis icon (**AA**) in the upper right corner of the tile for the Workspace that you want to leave. A number of options appear. (The specific options vary depending upon whether you are a viewer, an editor or a Workspace owner.)
2. Click the Leave Workspace icon. 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.
3. Click **Leave**.



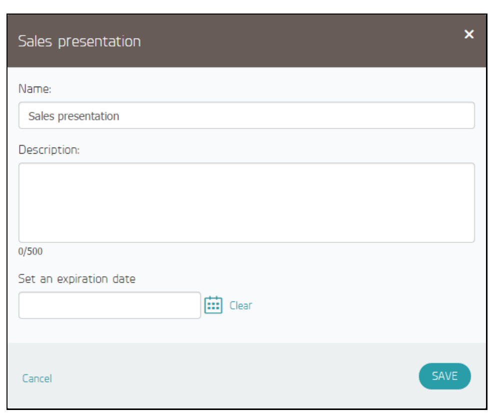
A Workspace tile and the Leave Workspace icon.

You cannot remove yourself from Workspaces that you have created. If you no longer need a Workspace that you created, you can either expire it or delete it. If you expire a Workspace, you will be able to view it and make changes to it, but viewers and editors will no longer have access to it. If you delete the Workspace, it is removed permanently. For more information, see "Expiring and deleting Workspaces" on page 15.

Renaming your Workspace

If you are a Workspace owner, you can rename the Workspace if necessary.

1. Display the Workspace that you want to rename.
2. Click the info icon ⓘ (next to the Workspace name). An info panel appears.
3. Click the **Edit** link.
4. Enter the new name in the **Name** field.
5. Click **Save**.



The Workspace name can be edited.

Marking Workspaces as favorites

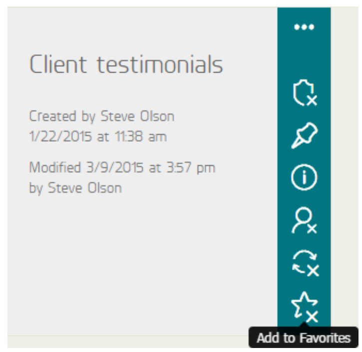
You can mark Workspaces that are most important or that require the most urgent action. Then when you display the **Workspaces** view, you can use the **Favorites** filter to show only the Workspaces that you have marked as important.

You can mark one or more Workspaces using the **Workspaces** view, or you can mark individual Workspaces while you are viewing them.

In the **Workspaces** view, when you click the ellipsis icon (**AA**) in the upper right corner of a Workspace tile, a number of options appear. Click the star icon at the bottom of the list to mark the Workspace as a favorite.

If you are viewing an individual Workspace, look for the star icon to the right of the Workspace name. Click the icon to mark the Workspace; a red check mark will appear on the icon.

To unmark a Workspace, click the star icon again. The check mark will be replaced with a gray X, and the Workspace will no longer appear when you use the **Favorites** filter in the **Workspaces** view.



A Workspace tile and the Favorite icon.

Using workboards to organize Workspaces

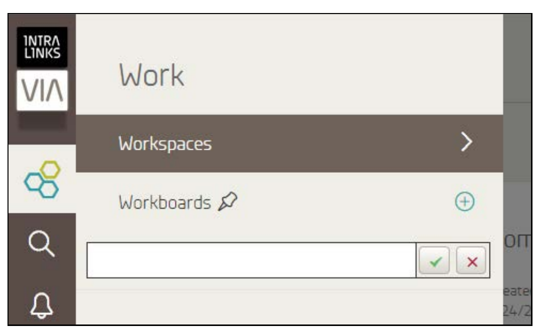
If you have many Workspaces, you can use *workboards* to organize them. When you create a new Workspace or are invited to a new Workspace, it will not appear on any workboards, but you can pin it to one or more workboards if you like.

You can use workboards to group Workspaces for related projects or to group your most urgent collaborative efforts, for example. The workboards are for your use only — no one else will see them — so you can tailor them to meet your needs, and change them as your needs change.

A Workspace can be added to multiple workboards if you like. Workspaces that have been pinned to workboards will continue to appear in the main **Workspaces** view, as well.

Creating a workboard

1. Click the Workspaces icon in the navigation bar on the left side of the screen. A panel slides out displaying any workboards that you have created already, along with a blank field that you can use to create the new workboard.
2. Enter a name for the new workboard.
3. Click the green check mark icon to the right of the workboard name.



Enter a name and click the check mark icon.

Adding Workspaces to workboards

After you have created workboards, you can add Workspaces to them.

1. In the **Workspaces** view, click the ellipsis icon (**AA**) next to the name of the Workspace that you want to add to a workboard. A number of options appear.

2. Click the pin icon at the top of the list. The **Pin to** screen appears.
3. Click the box next to the workboard (or workboards) where you want this Workspace to appear.
4. Click **OK**.

After you have pinned Workspaces to workboards, click the Workspaces icon on the left side of the screen to display a list of workboards. Click on a workboard to see the Workspaces pinned to it.

To view all Workspaces, click the Workspaces icon again and click the **Workspaces** option at the top of the list.

Searching for files or Workspaces

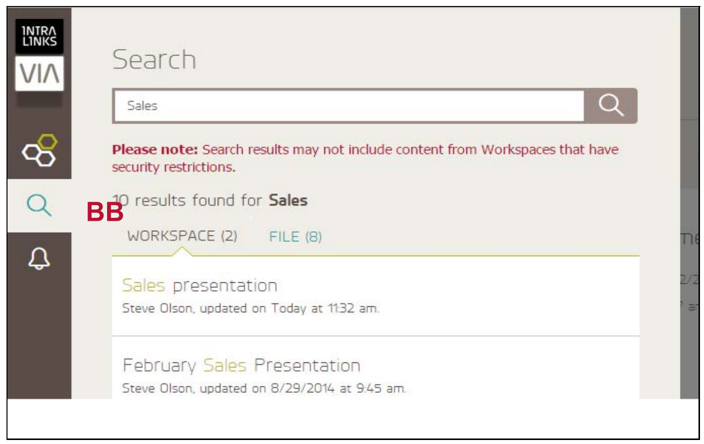
You can use Intralinks VIA Pro’s search tool to find files and Workspaces quickly.

1. Click the Search icon in the navigation bar on the left side of the screen. A panel slides out displaying a search field.
2. Enter a search term and click the icon next to the search field.

   If your search includes any Workspaces that require two-step verification, you will be prompted to enter a security code. If no code is entered, the search will ignore those Workspaces.

   In a few moments, search results will appear. Workspaces appear separately from files; click the **Workspace** and **File** headings (**BB**) to move between the two sets of search results. If the search finds a match within the contents of a file, an excerpt of the contents showing the match is included. When you click on a result, you will be taken to the Workspace where the file is located, and the file will be highlighted briefly.

The results of your search will remain on the search panel. If the file or Workspace that you selected is not the one that you want, click the Search icon again to redisplay the results.



The Search panel, with the results of a search.

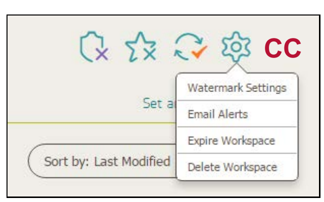
Applying watermarks to Workspaces

You can configure Workspaces that you own to apply a watermark to PDF and Microsoft Office files in your Workspace. Watermarks will be applied only to files that are smaller than 200MB.

If watermarking is enabled, watermarks will appear on PDF files whether they are viewed in the Workspace, downloaded, or printed. You can choose to apply watermarks to all PDF files in the Workspace or only to those that are protected by Intralinks’ embedded, plugin-free information rights management (IRM) technology.

Protected Microsoft Office files will be watermarked only when the files are viewed online, and will not appear when files are downloaded or printed.

To apply watermarks, display the Workspace and click the gear icon (**CC**) in the upper right corner of the screen. Select **Watermark Settings** from the box that appears.



Options for watermarking, expiring and deleting the Workspace.

In the **Watermark Settings** screen, move the **Watermark** toggle to the **ON** position. Select watermark settings, then click **Save** when finished.

Expiring and deleting Workspaces

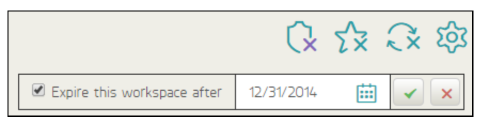
When you have finished work on a Workspace, you can expire the Workspace or delete it.

- If you ***delete*** a Workspace, it is removed permanently, and neither you nor any of the people whom you invited to the Workspace will be able to access files or comments associated with it. This action cannot be undone, so do not delete a Workspace unless you are certain that you will not need access to it in the future.
- If you ***expire*** a Workspace, the viewers and editors you invited to the Workspace will lose access to it immediately. You and other Workspace owners can continue to view the Workspace and make changes to it, however. You can expire a Workspace at any time, even if you set an expiration date for the Workspace when you created it, and that date has not arrived yet. If you set an expiration date for a Workspace, the Workspace will expire at the end of the day that you selected. After a Workspace has expired, it cannot be made active again, so use care when expiring your Workspaces.

To delete or expire a Workspace, display the Workspace and click the gear icon (**CC**) in the upper right corner of the screen. Select the option you want from the box that appears.

Setting or changing a Workspace's expiration date

If you wish to set or change the date on which a Workspace will expire, display the Workspace and then click on the expiration date, which appears in the upper right corner of the screen. (If no expiration date has been set yet, a **Set an expiry date** link appears instead.) A date field will appear. You can type the new expiration date or click the calendar icon to select the date from a calendar widget. When you have made your entry, click the green check mark icon to save your change. The Workspace will expire at the end of the day that you selected.



Enter an expiration date or selection one using the calendar.

If your organization has a policy that requires that Workspaces expire within a set number of days after its creation, you will not be able to enter or select a date beyond the date allowed by the policy.

If you no longer want a Workspace to expire at all, you can remove the expiration date by unmarking the check box that appears to the left of the expiration date field. (The box does not appear if you are required to enter an expiration date.)

Managing email alerts for Workspaces

Intralinks sends you an email alert whenever files are added or updated and new comments are made on files in your Workspace. You can choose whether to receive these emails.

To change the email settings for a single Workspace, display the Workspace and click the gear icon (**CC**) that appears in the upper right corner of the screen and select **Email Alerts**.

You can choose to be alerted when a participant makes one of the following changes to the Workspace:

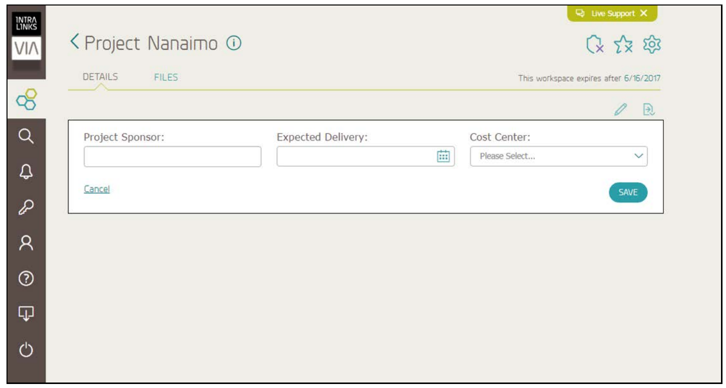
- Files are added to the Workspace. (If you have access to specific folders, you will receive alerts only for the files that you can view.)
- Files that you can view are updated.

- Comments are added for files you can view.

Note: This change affects only the Workspace that you are viewing. Managing email alerts for all Workspaces

To change email settings for all Workspaces at the same time, click Notifications in the left pane and mark **Receive email alerts about Workspace updates**.

Viewing and adding details about your Workspace



*Editing information in the **Details** view.*

Depending upon your organization's needs, your Intralinks VIA Pro administrator may have added a number of fields to track information about your Workspaces. Some of these fields may be required. If the administrator has added these fields, a **Details** tab appears inside each of your Workspaces. Click on the tab to view these fields.

If you are a Workspace owner, you can enter or select information about the Workspace. If you are an editor or viewer, you can view the information, but you cannot change it. To add or change Workspace details, click the edit icon in the upper right corner of the screen. Once you have made the changes you want, click **Save**.

Exporting information in the Details view

You can export the information that is currently displayed in the **Details** view to a file in PDF or Microsoft Excel format. If you export the information to Excel, you can manipulate the data further or prepare reports for your corporate leadership. To export Workspace details, click the export icon in the upper right corner of the screen and choose the format that you want.

Syncing Workspace content to your desktop

If you have a full (paid) Intralinks VIA Pro account and you have installed the Intralinks VIA Pro Desktop Client for Windows or Macintosh, you can choose to have the contents of individual Workspaces added to the Intralinks VIA Pro folder on your computer. Any changes made to the Workspace will be synced automatically to the desktop, and any changes made to the files on the desktop will be synced automatically to the Workspace, where they will be available to everyone participating in the Workspace.

Workspace icons.

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

To begin syncing a Workspace, display the Workspace and click the Sync icon (**DD**) in the upper right corner of the screen. An orange check mark will appear on the icon to indicate that the Workspace is being synced. If you want to stop syncing a Workspace, click the Sync icon again.

You must click the Sync icon for each Workspace that you wish to sync.

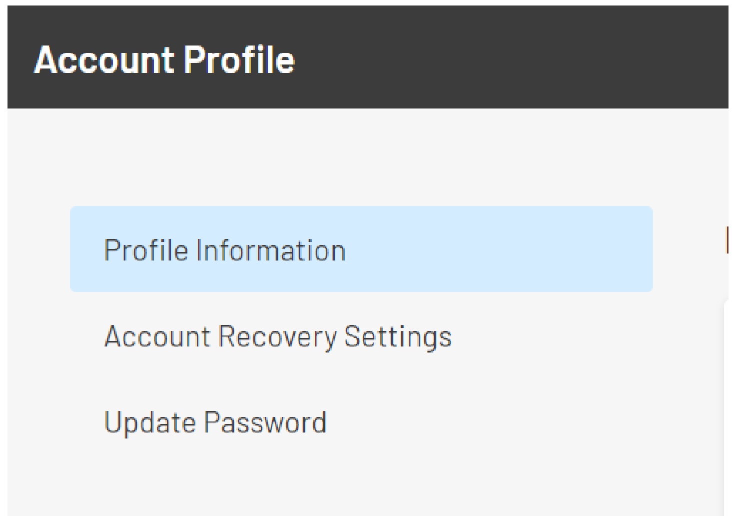
To view Workspace files on your desktop, open the **Intralinks VIA Pro** folder in Windows Explorer or the Finder. There is a separate subfolder for each synced Workspace.

If you open a synced file that is being edited by another person, a message will appear to warn you of this. The message will be informational only; you can open or change the document if you wish, but you may have to reconcile your version with the version saved by the other person when you save your changes.

If you delete a synced Workspace file on the desktop, that file will be removed from the Workspace, as well.

Your personal profile

You can view and update your personal profile at any time. You can set email and language preferences, change password and security settings, and edit your Intralinks account profile.



The preferences screen.

Setting your profile preferences

Click the Profile icon in the navigation bar on the left side of the screen, click **Account Profile**, then click **Edit Profile**.

Selecting display language and time zone

You can select the language in which Intralinks VIA Pro is displayed by making a selection from the **Language & Date Format** list. Email alerts also appear in the selected language.

Select the time zone for your location by selecting from the **Time Zone** list. Click **Save Changes**.

Changing how we verify your identity

Click the Profile icon in the navigation bar on the left side of the screen, click **Account Profile**, and then click **Account Recovery Settings**.

Multi-factor authentication (MFA) is used to verify your identity when you want to gain access to workspaces with enhanced security that require MFA, or to reset your password.

You can use Okta Verify, another preferred Authenticator, or a mobile phone on which you will receive a code by text (SMS). You can configure as many methods as you want.

Changing your password

Click the Profile icon in the navigation bar on the left side of the screen, and then click **Account Profile**.

Click **Update Password**. Enter your current password, and then enter the new password twice. Password must meet or exceed the minimum criteria shown on the screen. Click **Update Password**.

Editing your account profile

Click the Profile icon in the navigation bar on the left side of the screen, click **Account Profile** and then click **Edit Profile**.

Edit your name and office/mobile phone numbers, and select your title, industry and functional area, as desired. (Your email address cannot be edited; it is used by Intralinks to identify you.) Click **Save Changes** to save your changes.

Getting help with Intralinks VIA Pro

If you have a problem and need help while using Intralinks VIA Pro, you can click the **Live Support** link at the bottom of the screen to start a chat session with an Intralinks client support specialist. A chat window will open and you will be connected with a support specialist.

A number of other support tools are available. To view them, click the Help icon in the navigation panel on the left side of the screen; a Help pane will appear. Select one of the following options from the pane:

Live Support Chat — This link opens the same chat window that the **Live Chat** link opens.

Support Center — This link opens the Intralinks VIA Pro Support Center. You can email a question to the Intralinks support team or start a chat session, get copies of the VIA Pro startup guides, view short video tutorials, access the Intralinks Academy resource center, and view FAQs for Intralinks VIA Pro.

Feature Tour — This link displays a video overview of Intralinks VIA Pro's key features.

What's New? — This link displays a video that shows the features added in the latest update to Intralinks VIA Pro. This link is helpful for those who have been using Intralinks VIA Pro for awhile and want to get up to speed on recent enhancements.

Intralinks Academy — This link displays Intralinks Academy, Intralinks' web-based collection of video tutorials and other learning materials.

Give Feedback — This link displays a text box that you can use to send feedback about your experience with Intralinks VIA Pro. Use this link, for example, if you want to suggest improvements or new features.

Downloading other Intralinks VIA Pro tools

You can download a number of tools to help you get more out of your Intralinks VIA Pro experience. Click on the Downloads icon in the navigation bar on the left side of the screen. A panel will appear with the following options:

- Intralinks VIA Pro Desktop Client (available for Windows and Mac OS X)
- Intralinks VIA Pro apps for iPad, iPhone and Android devices

Logging out of Intralinks VIA Pro

When you have finished working with Intralinks VIA Pro, click on the Logout icon at the bottom of the navigation bar on the left side of the screen.

Logging in to another Intralinks application

If you have access to other Intralinks applications, you can switch applications without the need to reenter your login credentials.

Click the **App Switcher** icon and click on the application that you want to open. Note that this menu only appears if you have access to other Intralinks applications.