Intralinks VIA® Pro for Android

Welcome to Intralinks VIA® Pro for Android

Intralinks VIA Pro for Android 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: Intralinks VIA Pro works best on Android devices with fingerprint scanning technology (Android 6.0 and later). The app also is compatible with older devices running Android 4.1 and 5.0, but features that require fingerprint scanning, including quick login and document download, will not be available.

Installing the Intralinks VIA Pro app

1. Using your Android device, launch the Google Play 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 **Install** button.

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/passcode 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 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. 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**.

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 Android device must be connected to the Internet.

1. Point your browser to: https://via.Intralinks.com.

2. Enter your email address and tap **Next**.

3. Enter your password/passcode 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.

    The **Workspaces** view appears. (The Intralinks VIA Pro administrator role does not include the ability to create Workspaces. If your only responsibility with Intralinks VIA Pro is to act as administrator, no Workspaces will be displayed.)

5. Access Intralinks VIA Pro using your fingerprint or by creating a passcode, as described below.

Using fingerprint scanning

If your Android device has fingerprint scanning capability, you can use your fingerprint to access Intralinks VIA Pro.

If you have not set up fingerprint scanning on your device, you can do so by opening your device's **Settings** app, tapping **Security**, and then opening your device's fingerprint manager application. Follow the instructions on the screen to enroll your fingerprint.

The Intralinks VIA Pro icon.

Important! Anyone whose fingerprint is enrolled on your device will be able to access 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 fingerprint scanning, always log out of Intralinks VIA Pro before sharing your device.

Using a passcode

If your device does not have fingerprint scanning capability (or you choose not to enroll a fingerprint on your device), each time you log in with your email address and password, you will be prompted to create a six-digit passcode to access Intralinks VIA Pro. Whenever you close the app or put it in the background (without logging out), you will use this passcode to open it again. This passcode is required for non-fingerprint-enabled devices.

Note: Your passcode will be invalidated if you enter it incorrectly three times in a row. 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 "Entering a new password/passcode" on page 10.

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. Tap the **Menu** icon (**A**) in the upper left corner of the Intralinks VIA Pro screen to display the Intralinks VIA Pro main menu (**B**). Use options on the main menu to view your Workspaces and notifications, access your downloaded files (available on fingerprint-enabled devices only), configure settings and view help content.

Getting help

If you would like to view a short video tutorial or get help from the Intralinks customer service team, tap **Help** (**C**) in the Intralinks VIA Pro main menu. 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.

To change the filter being used, swipe through the filter list (**D**) at the top of the screen. You can select any of the following filtering options:

- **All** – Select this option to view all of the Workspaces that you currently have access to.

- **Created** – Select this option to view all the Workspaces that you have created.

- **Owned** – Select this option to view all the Workspaces for which you are a Workspace owner. These are Workspaces
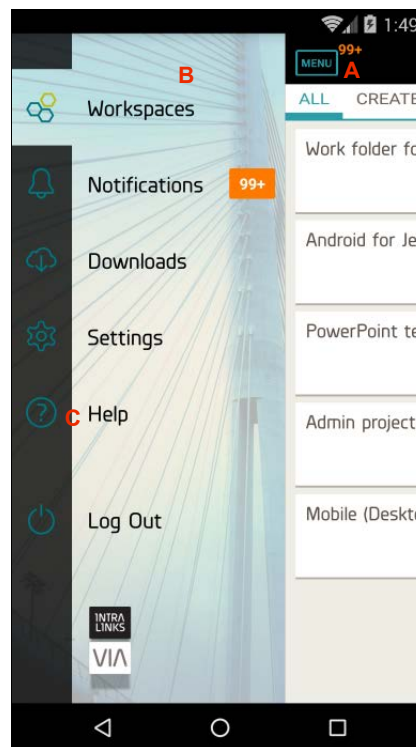
The Intralinks VIA Pro main menu.

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 icon (**E**). A dialog box appears with two options:

- **Name** – The list will be sorted alphabetically by name. Workspaces whose names begin with numbers will appear at the very top of the list, before those with alphabetic names.

- **Last updated** – The most recently updated Workspaces will appear at the top of the list.

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

Performing actions quickly

If you are a Workspace owner or editor, you can perform a variety of actions with a few taps using Intralinks VIA Pro's quick action menu. The quick action menu is available for Workspaces, folders, and files. To display the quick action menu, tap the ellipsis icon ⚫⚫⚫ (**F**) next to a Workspace, folder or file. A quick action menu appears either at the bottom of the screen or at the top of the screen, depending upon the item you selected. The actions that you can perform depend upon your role.

If you are a viewer within the Workspace or folder, the quick action menu does not appear when you tap the ellipsis icon. Instead, the **Details** screen for the item is displayed for you.

Viewing Workspace, folder and file details

To view the **Details** screen for a Workspace, folder or file, tap the ellipsis icon ⚫⚫⚫ next to the item's name. If you are a Workspace owner or editor, a quick action menu appears; tap the **Details** icon.

For Workspaces, you can view the date the Workspace was created and when it was last updated, and by whom; you can view whether IRM protection and an expiration date have been set for the Workspace; you can choose to leave the Workspace (if you are not an owner of the Workspace); and you can view a list of people who are using the Workspace and change their role within the Workspace (if you are a Workspace owner).

For folders, you can view the date the folder was created and when it was last updated, and by whom; you can view whether IRM protection has been set for the folder; and you can view a list of people who are using the folder. If you are a Workspace owner or editor, you can rename the folder. (Editors can rename only the folders that they created.) If you are a Workspace owner, you also can share the folder with people or remove people's access to the folder.

For files, you can view the date the file was added to the Workspace and when it was last updated, and by whom; and you

The quick action menu for a Workspace.
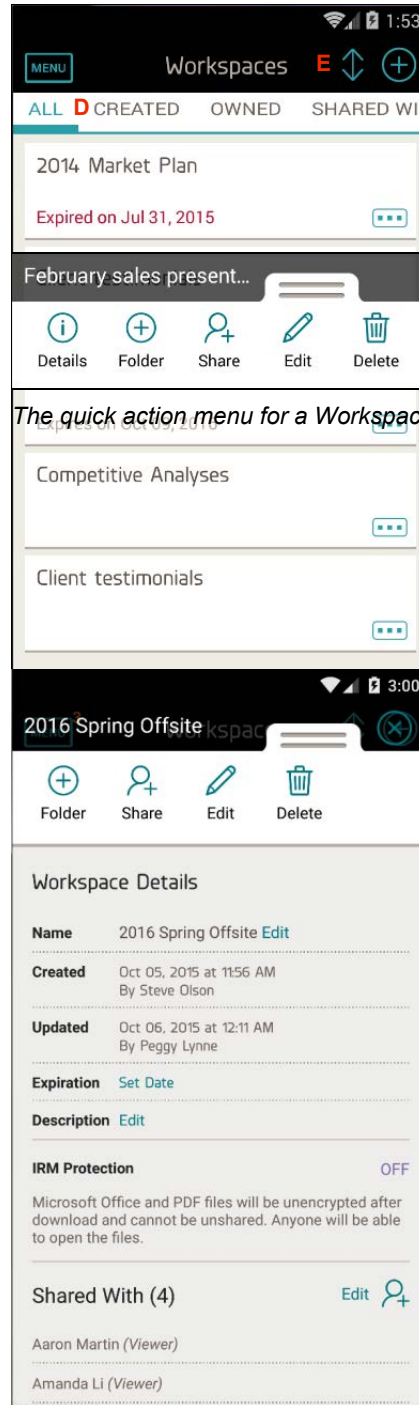
Details for a Workspace.

can view whether IRM protection has been applied to the file. If you are a Workspace owner or editor, you can rename the file (editors can rename only the files that they added to the Workspace).

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

Viewing files

To open a file within a Workspace, tap on the file's name (**G**).

Depending upon how your Workspace is set up, you also may be able to view unprotected files in other compatible applications. To do this, tap the ellipsis icon ⋯ to display the quick action menu. Then tap the **Open In** icon to display a list of compatible applications that can be used to open the file.

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 may need to use Intralinks VIA Pro for the Web on a laptop or desktop computer.

Some of the files in your Workspaces might be protected and cannot be viewed, printed or downloaded with your Android device. You must use Intralinks VIA Pro for the Web to view these files.

Workspace owners determine whether to protect files. If you see a shield icon with a padlock (**H**) next to a Workspace or folder, all Microsoft Office and PDF files within the folder or Workspace are protected. Only Microsoft Office and PDF files can be protected.

Viewing and adding comments to files

To view or add comments about a file in a Workspace, tap the Comments icon (**I**) at the right of the file name. If you have opened the file, 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 in the **Add a comment** field at the bottom of the screen and begin typing. When you have finished your comment, tap the Send icon (**J**) to add it.

Downloading files for offline viewing

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

If your Android device supports fingerprint scanning, you can download important files for viewing when your device is unable to connect to the Internet or a mobile network. To download a file for offline viewing, tap the ellipsis icon ⋯ next to the file's name. The quick action menu appears. Tap **Download**. (Note that IRM-protected files cannot be downloaded.)

Important! If Auto-Sync is turned on, downloaded files will be automatically updated when changes are made to the original version on the Workspace. If your device is offline when changes are made, the downloaded copies will be updated the next time your device is online. If your device has a data plan, updates may consume a significant amount of its data usage allotment. If this is
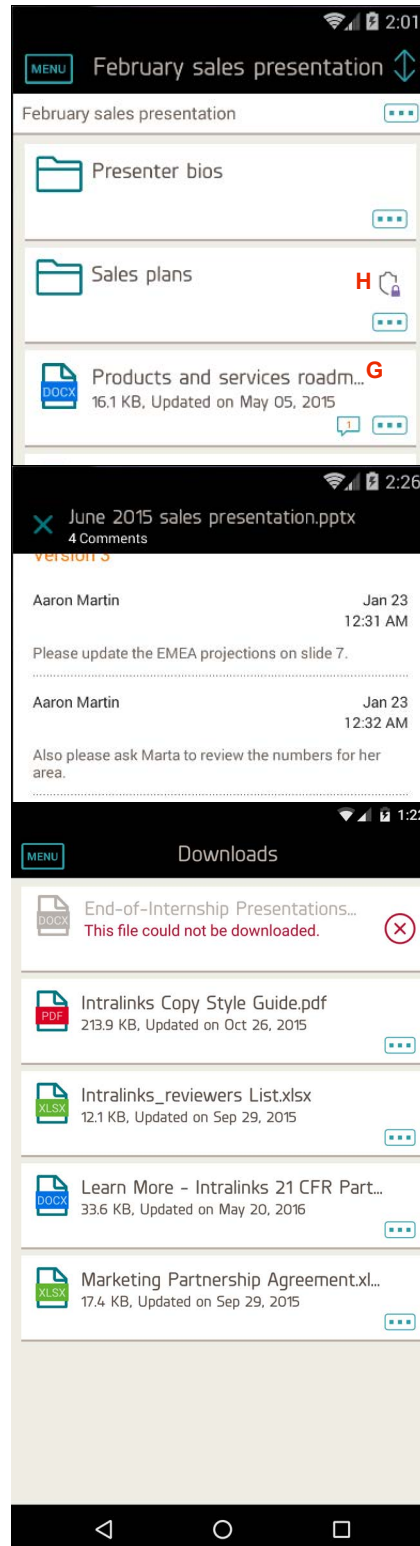
The Downloads screen.

a concern, you may want to limit the number of files that you download for offline use and perform downloads and updates only when your device is connected to a wireless network.

You can turn auto-sync ON or OFF. For more details, see "Turning on auto-sync for downloads" on page 10.

To view the files that you have downloaded, tap **Downloads** on the Intralinks VIA Pro main menu to display the **Downloads** screen. Tap on the file you want to view. To remove a downloaded file, tap the ellipsis icon ⬚ next to the file's name and tap the Remove Download icon ☁. (The original file on the Workspace will not be affected if you remove your downloaded copy.)

Annotating PDF files

You can add notes, highlight text and make other editing changes to PDF files you have downloaded using Intralinks VIA Pro's PDF annotation tools. Only downloaded, unprotected PDF files can be annotated.

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.

To annotate a PDF file, tap the file to open it, and then tap the Annotation icon (**K**). The Annotation toolbar appears.

You can use the following tools:

*   Highlight/Squiggle/Strike Out/Underline (**L**) – Tap this tool and choose an option. Then drag your finger over the text you want to affect. You can use the Ink tool (**P**) to change the color.

*   Free text (**M**) – Tap this tool to place text directly on the page; the text will not appear in a note box.

*   Pen (**N**) – The Pen tool allows you to draw freehand lines and drawings. You can use the Ink tool (**P**) to change the color and width of the lines made by the Pen tool.

*   Notes (**O**) – Notes appear within a Note box. You can change the color of the note box and icon, and the shape of the icon, by tapping the Edit tool inside the Note box.

*   Ink tool (**P**) – The Ink tool allows you to change the color of annotation text and lines.

Adding files to a Workspace from another application

While viewing files in an Android app that allows you to share, export or send files (such as Google Photos™), you can add the files to Intralinks VIA Pro Workspaces. When you select Intralinks VIA Pro as the location for the file or files, Intralinks VIA Pro is launched and you can select the Workspace where the files will be added; if you want, you can place the files in an existing folder or create a new folder for them.

You can add files only to Workspaces for which you are a Workspace owner or editor. The files must be 50MB or smaller. (Larger files must be added using Intralinks VIA Pro for the Web.)
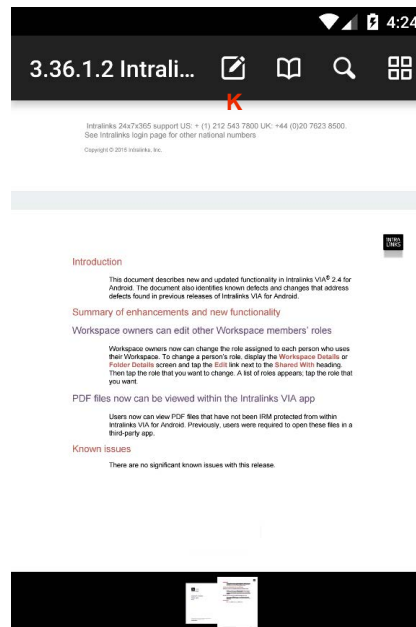
Android Annotation tools.

Annotation toolbar.

You cannot add files to Workspaces or folders that have been protected.

Viewing participants in a Workspace or folder

Tap the ellipsis icon [...] next to the Workspace or folder name. If you are a Workspace owner or editor, tap the **Details** icon. The **Details** screen appears; the **Shared With** area of the screen displays a list of people who are using the Workspace or folder, along with other details.

Adding participants to a Workspace or folder

If you are a Workspace owner, you can add people to the Workspace or a folder. On the **Details** screen, tap the Add People icon [icon]; the **Share This Workspace** screen or **Share This 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 **Names or Emails** 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 if you like; tap the **Message** icon and add your message on the line that appears. Tap **Share** to add the new participants and send invitation alerts to them.

Updating participants' roles

If you are a Workspace owner, you can change the role assigned to each person who uses the Workspace.

To change the role of a person who has access to the entire Workspace, open the **Details** screen for either the Workspace or a folder. To change the role for a person who has access to a particular folder, open the **Folder Details** screen for that folder.

For people who have access to the entire Workspace, you can assign the following roles: **Viewer**, **Invisible Viewer**, **Editor** and **Owner**. For people who have been given access to a particular folder, you can assign the following roles: **Viewer**, **Invisible Viewer** and **Editor**.

Tap the ellipsis icon [...] next to the Workspace or folder name, then tap the **Details** icon. Then tap the **Edit** link next to the **Shared With** link. The **Edit Access** screen appears, listing everyone who has access to the Workspace or folder. Tap on the role you want to change; a list of roles appears. Tap the new role that will be assigned to this person. When you have finished making changes, tap **Save**.
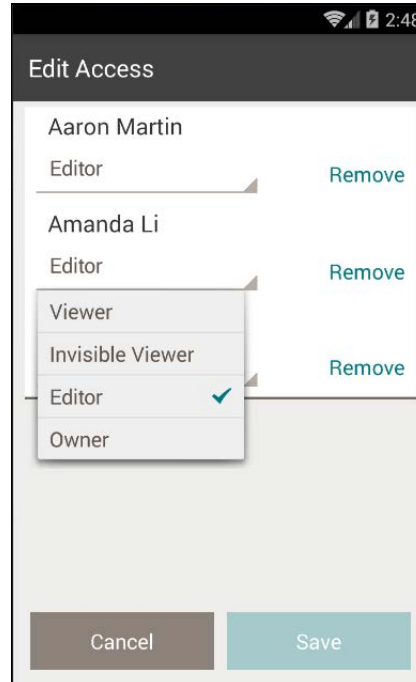
Removing a participant's access to a Workspace or folder

If you are a Workspace owner, you also can remove a participant's access to the Workspace or folder.

Tap the ellipsis icon [...] next to the Workspace or folder name, then tap the **Details** icon. Then tap the **Edit** link next to the
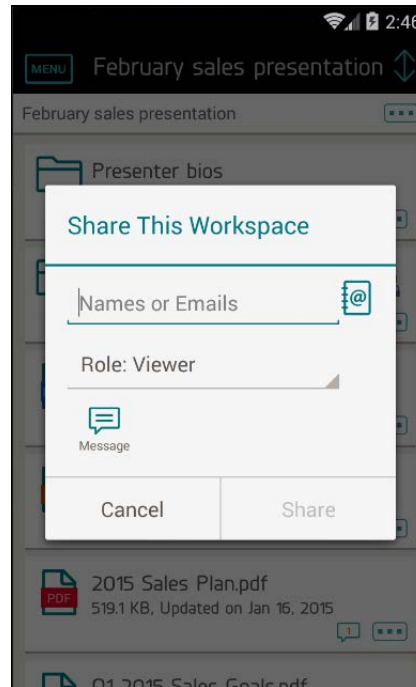
The Share This Workspace screen.

The Edit Access screen, with a list of roles displayed.

Shared With link. The **Edit Access** screen appears, listing everyone who has access to the Workspace or folder. Tap the **Remove** link next to the person's name, then tap **Save**.

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 **Notifications** on the Intralinks VIA **Main Menu** 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 ellipsis icon next to the Workspace name. The quick action menu appears. Tap the **Folder** icon. A message 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**.
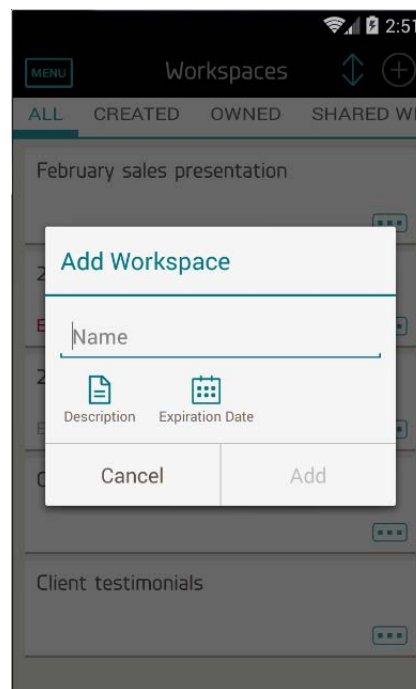
Adding a Workspace

To create a new Workspace, display the **Workspaces** screen and tap the Add Workspace icon ⊕. The **Add Workspace** screen appears. Enter a name for the Workspace.

If you want to add a description of the Workspace, tap the **Description** icon and enter a description in the field that appears.

If you want to limit the amount of time that a Workspace is available, tap the **Expiration Date** icon. The **Expiration Date** screen appears, allowing you to 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.

The Add Workspace screen.

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**.

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 **Leave**. 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.

Entering a new password/passcode

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

Tap **Settings** on the Intralinks VIA Pro main menu to display the **Settings** screen, then tap **Change Password**. The **Change Password** screen appears. Enter your new password/passocde, then tap **Save**.

Turning on auto-sync for downloads

You can turn on auto-sync for downloads so that your downloaded files will be updated automatically when changes are made to the original files on the Workspace. Note that if you sync using your device's data plan, this may consume a significant amount of its data usage allotment.

Tap **Settings** on the Intralinks VIA Pro main menu to display the **Settings** screen, then tap **Auto-Sync**. The **Auto-Sync** screen appears. Tap the box to turn on auto-sync, then tap **Auto-Sync Options** to select syncing over **WiFi or Data Plan** or **WiFi only**.

Logging out of Intralinks VIA Pro

Logging out is not required unless another person wants to use the Intralinks VIA Pro app on your mobile device. As a security precaution, you should log out before allowing anyone else to use your device. When you log out, all downloaded files will be automatically removed from your device.

To log out, tap **Log Out** at the bottom of the Intralinks VIA Pro main menu.