Intralinks VIA® Pro Desktop Client for Windows

Version 4.0.0

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See Intralinks login page for other national numbers

Welcome to the Intralinks VIA® Pro Desktop Client

The Intralinks VIA Pro Desktop Client makes it easy for you to keep track of important personal files. Read this guide to get acquainted with the key tasks that you can perform with the Intralinks VIA Pro Desktop Client.

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 the Intralinks VIA Pro Desktop Client, you must have one of the following operating systems and other software:

- Windows 10 (32-bit or 64-bit), Windows 11
- Microsoft .NET Framework 4.6.1 or later
- Microsoft Outlook 2010 or 2013

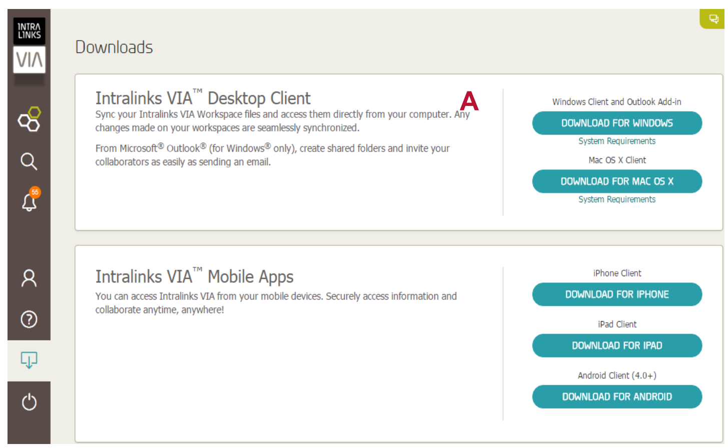
In order to view IRM-protected documents, you must have Adobe Reader® 10 or greater.

Installing the Intralinks VIA Pro Desktop Client

The installer for the Intralinks VIA Pro Desktop Client can be downloaded from within Intralinks VIA Pro for the Web.

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

   The Intralinks VIA Pro login screen appears.
2. Enter your email address and password, and click **Log in**. The Workspace view appears.
3. Click the Downloads icon in the navigation bar on the left side of the screen. A panel will appear.
4. Select the **Downloads** option. The **Downloads** screen appears.
5. In the **Intralinks VIA Desktop Client** section, click the **Download for Windows** button (**A**).
6. Download the installer file. Depending upon the browser you are using, you may be asked to select a location for the installer file.
7. Locate the installer file and double-click it to start the installer. Follow the instructions on the screen to install the Intralinks VIA Pro Desktop Client, including the component for Microsoft Outlook.



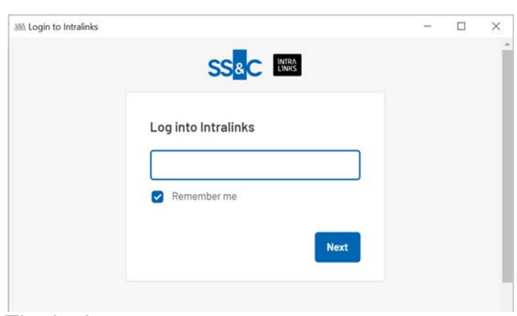
*The **Downloads** screen.*

You can install the Intralinks VIA Pro Desktop Client on more than one computer if you like. If you do, you can use the Desktop Client on these computers at the same time.

Starting the Intralinks VIA Pro Desktop Client

1. From the Windows **Start** menu, choose **All Programs** > **Intralinks** > **Intralinks VIA** > **Intralinks VIA**. The login screen appears.
2. Enter your email address and click **Next**.

   If your organization uses Single Sign-On (SSO) functionality and you are logged into the corporate network, VIA Pro Desktop Client is displayed automatically. If you are not logged into the corporate network, you will be asked to log into it..



The login screen.

3. Enter your password/passphrase and click **Log in**.

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 **What's New** screen appears.

5. If you want to know more about the current version of the Intralinks VIA Pro Desktop Client, review the information on the screen. When you are ready to continue, click **Start**.

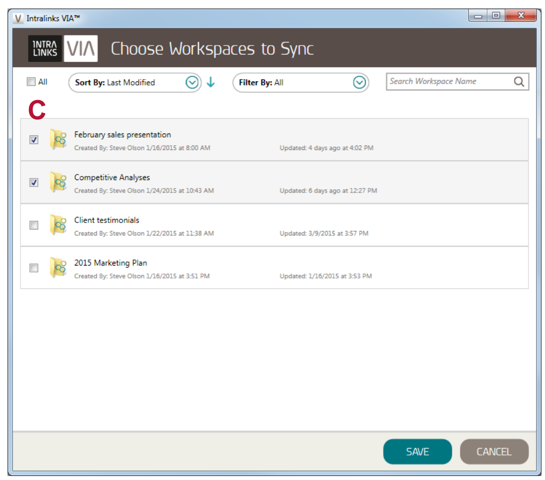
6. The **Choose Workspaces to Sync** screen appears. The screen lists the Workspaces that you have been invited to use, as well as those that you have created.

   Mark the check box (**C**) that appears to the left of each Workspace that you want to begin syncing.

   A copy of the folders and files in these Workspaces will be added to the Intralinks VIA Pro folder on your computer. Any changes made to the files on your computer will be transferred to Intralinks VIA Pro for the Web, where they will be available to everyone participating in the Workspace. If you are using the Desktop Client on any additional computers, your changes will appear there, as well. Any changes that you make with Intralinks VIA Pro for the Web will be copied automatically to your desktop.

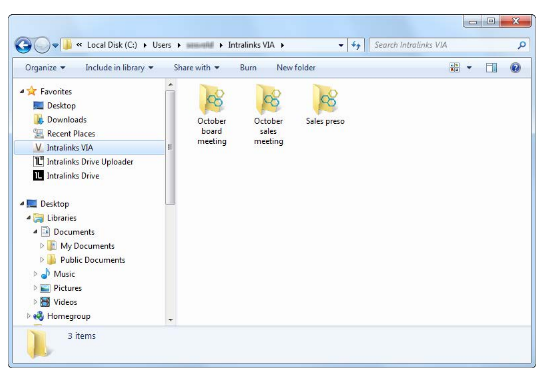
   If other people make changes to a Workspace that you created or a Workspace or folder that you have been invited to use, those changes will be synced to your desktop.

   Review the selections on the **Choose Workspaces to Sync** screen. Mark any Workspaces that you want to begin syncing, and unmark any Workspaces that you no longer want to sync. (Note that if you unmark a Workspace, all the files associated with that Workspace will be removed from your computer.) When you are ready to continue, click **Save**.



*The **Choose Workspaces to Sync** screen.*

7. The **Intralinks VIA** folder appears in Windows Explorer. Notice that there is a separate folder for each synced Workspace. Using these folders, you can manage the files in the Workspaces that you have synced.



*The **Intralinks VIA Pro** folder.*

When you have finished working with the Intralinks VIA Pro Desktop Client, you can close Windows Explorer.

Redisplaying your Intralinks VIA Pro folder

To reopen your **Intralinks VIA** folder quickly, click the Intralinks VIA Pro icon in the Windows System Tray. Select **Open Intralinks VIA Folder** from the menu that appears.

Alternatively, you can open Windows Explorer and find the folder there.

Working with the Intralinks VIA Pro Desktop Client

After you have begun syncing Workspaces, you can use the Intralinks VIA Pro Desktop Client to add, delete and rename files in these Workspaces. You also can rename synced Workspaces.

If you move a file or folder to a location outside the Workspace folder, the file or folder will be removed from the Workspace.

Selecting additional Workspaces for syncing

If you want to begin syncing a Workspace, you can redisplay the **Choose Workspaces to Sync** screen at any time and select the Workspace. You also can stop syncing a Workspace at any time.

To redisplay the **Choose Workspaces to Sync** screen, click the Intralinks VIA Pro icon in the Windows System Tray. (The System Tray usually is located in the lower right corner of your computer screen.) A menu will appear; select **Select Workspaces**. The **Choose Workspaces to Sync** screen appears. Mark the Workspaces that you want to begin syncing and click **Save**.

You also can sync Workspaces using Intralinks VIA Pro for the Web. To learn more about selecting Workspaces for syncing, see the *Intralinks VIA Pro for the Web Startup Guide*.

Accessing IRM-protected Microsoft Office files while offline

Depending upon the policies set by your Intralinks VIA Pro administrator, you may be able to access IRM-protected Microsoft Office 2013 and 2016 files that have been synced to your desktop even when your computer does not have a network or Internet connection. (IRM-protected PDF files cannot be viewed while offline.)

Note: Your computer must be running either Windows 7 or Windows 10. This offline viewing capability is not available for Workspaces that require two-step verification.

Synced files are available on a “leased” basis for a limited amount of time specified by the policy. During the lease period, no authentication is required for protected files. This is useful if you want to continue working with protected files while traveling, while in a location where an active network or Internet connection is not available or where connecting to a mobile network would result in roaming charges.

Selecting Workspaces for offline access

If offline access to protected files is enabled, you can select the Workspaces you want offline access to. Selections must be made while you have a network connection, and if you want to view the files on additional devices, you must repeat your selections on every device you want to use.

Click the Intralinks VIA Pro icon in the Windows System Tray and select **Select Workspaces** from the menu to open the **Choose Workspaces to Sync** screen. Workspaces that contain protected files and can be selected for offline access are indicated by **Offline Access** toggles. Lease times for each Workspace are shown below the toggles. Click the **Offline Access** toggle for any Workspaces that you want to be able to access while offline. Click **Save**.

Renewing offline access leases

When a document's lease period for offline access expires, authentication will again be required before you can access the file. The **Choose Workspaces to Sync** screen shows the length of time left for each lease.

You can manually renew leases for offline access. Be sure your computer is connected to the Internet, then click the Intralinks VIA Pro icon in the Windows System Tray and select **Renew Offline Access Leases**.

Syncing Workspaces with Sync Now

To sync your selected Workspaces now, click the Intralinks VIA Pro icon in the Windows System Tray. Select **Sync Now** from the menu that appears. (The Sync Now feature is disabled if syncing is paused.)

Viewing the sync status for your Workspaces

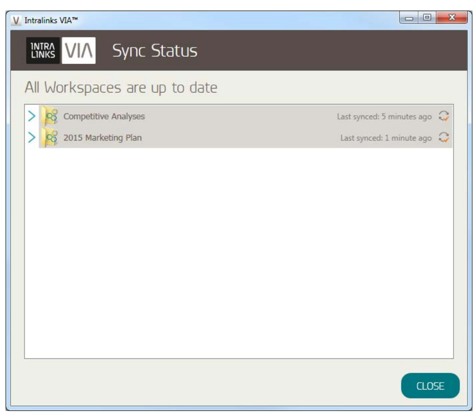
Use the **Sync Status** screen to see when your Workspaces were most recently synced. If any problems prevented files and folders from being synced, that information will be displayed in the **Sync Status** screen, as well.

To display the **Sync Status** screen, click the Intralinks VIA Pro icon in the Windows System Tray. Select **Show Sync Status** from the menu that appears.

In the **Sync Status** screen, click the details icon next to a synced Workspace to see detailed information about any problems that may have prevented syncing.

Pausing syncing

To temporarily stop the syncing process, click the Intralinks VIA Pro icon in the Windows System Tray. Select **Pause Syncing** from the menu that appears. When you are ready to resume syncing, click the Intralinks VIA Pro icon again and select **Resume Syncing**.



*The **Sync Status** screen.*

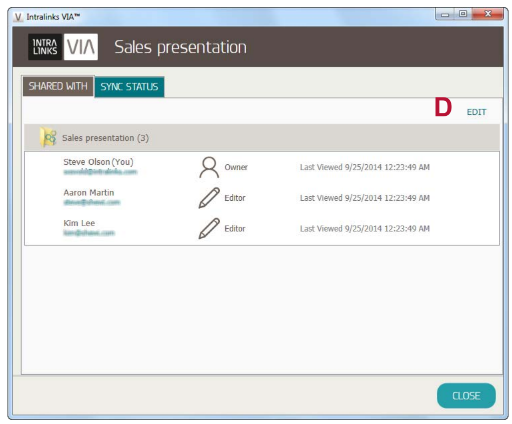
Adding Workspace participants (sharing Workspaces and folders)

You can add participants to Workspaces and folders you own. Right-click on the Workspace or folder you want to share, then select **Share Workspace** (or **Share Folder**) from the menu that appears. In the **Share Workspace** (or **Share Folder**) screen, enter the invitees’ email addresses. Optional: Enter a message that will appear in the email alerts sent to the invitees. Assign a role to the new participant(s), then click **Share**.

Viewing a list of Workspace participants

You can view a list of people who are participating in a synced Workspace. Locate the Workspace folder inside the Intralinks VIA Pro folder and right-click on it. Highlight the **Intralinks VIA** option and choose **Show Details** from the submenu. The **Shared With** tab of the Workspace details screen appears.

If you are an owner of the Workspace, you can click the **Edit** link (**D**) on the right side of the screen to launch Intralinks VIA Pro for the Web, where you can add or remove participants or change their Workspace role (owner, editor or viewer).

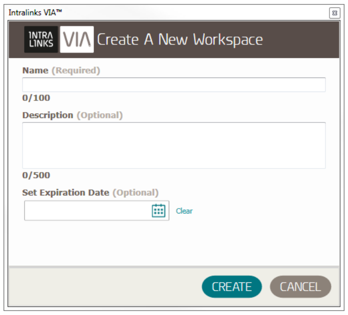


*The **Shared With** view of the Workspace details screen.*

Creating a new Workspace

To create a new Workspace, click the Intralinks VIA Pro icon in the Windows System Tray. Select **Create Workspace** from the menu that appears. The **Create a New Workspace** screen appears. Enter a name and a description for the new Workspace. You also can set an expiration date for the Workspace if you like. Click **Create**. The new Workspace is synced automatically with Intralinks VIA Pro for the Web.

You can create folders within the new Workspace and drag files to it from your computer.



*The **Create Workspace** screen.*

Managing Intralinks VIA Pro settings

You can use the **Settings** screen to determine your preferences for using the Intralinks VIA Pro Desktop Client, configure proxy settings if your organization does not allow direct access to the Internet, and import recent contacts from Microsoft Outlook for use with Workspaces in Intralinks VIA Pro for the Web.

Displaying the Settings screen

To display the **Settings** screen, click the Intralinks VIA Pro icon in the Windows System Tray. A menu will appear; select **Settings**. The **Settings** screen appears, with the **General** tab selected.

General tab

The **General** tab on the **Settings** screen allows you to set preferences for the way you will work with Intralinks VIA Pro.

- Mark the **Start Intralinks VIA when Windows® opens** option if you want the Intralinks VIA Pro Desktop Client to be started automatically when you start your computer and launch Windows. If you mark this option, the Intralinks VIA Pro icon will appear in the System Tray, and you can use it to start the Intralinks VIA Pro Desktop Client or Intralinks VIA Pro for the Web. If you choose not to mark this selection, you can start the Intralinks VIA Pro Desktop Client by clicking the Windows **Start** button and then selecting **All Programs** > **Intralinks** > **Intralinks VIA > Intralinks VIA**.
- Mark the **Show desktop notifications** option if you want notifications to appear briefly on the computer screen when you are added to another person's Workspace, a document is added or updated, or somebody adds a comment about a document in one of your Workspaces. Click on the notification to display the new or updated item in Intralinks VIA Pro for the Web.
- In the **Bandwidth Usage** section, indicate the percentage of network bandwidth that you want to allocate to Intralinks VIA Pro for file syncing. We recommend that you select the **Full** option to allocate 100 percent of available bandwidth to Intralinks VIA Pro. If you allocate less than 100 percent to Intralinks VIA Pro, syncing will take longer but other applications may operate more smoothly during syncing.

Be sure to click the **Save** button to save your changes.

Proxy Settings tab

If your organization uses a proxy server to manage connections to the Internet, you can use this tab to enter the settings needed for Intralinks VIA Pro to gain Internet access.

Contact your organization's IT team if you are unsure whether you need to make entries here and to obtain the information for these fields.

Be sure to click the **Save** button to save your changes.

Contacts tab

You can use the **Contacts** tab to import information about your contacts from Microsoft Outlook. Only the contacts that you have been in touch with recently will be included in the import.

To import contacts, enter your email address and password. After you have made your entries, click **Import**. The contacts' names and email addresses will be available to add to new and existing Workspaces in Intralinks VIA Pro for the Web.

Important! Intralinks does *not* store your email password and will *not* send email to your contacts. Your password is safe with us.

About tab

This tab displays information about the version of the Intralinks VIA Pro Desktop Client that is installed on your computer. It also includes links to Intralinks' privacy policy, legal notices, End User License Agreement and Support Center.

Getting help with Intralinks VIA Pro

If you encounter problems while using Intralinks VIA Pro, please contact Intralinks Client Services for assistance — we're here to help.

To find the phone number for support in your area, click the Intralinks VIA Pro icon in the Windows System Tray. A menu will appear; select **Help**, then select **Support Center** from the sub-menu. A web page with an email contact form will appear. If you wish to speak to a client support specialist, click the **Contact Us** link on the contact form. Intralinks offers support in more than 140 languages.

You also can visit Intralinks University to view tutorial videos and other learning resources. Intralinks University is located at https://ilearn.intralinks.com/via.html.

Exiting the Intralinks VIA Pro Desktop Client

To exit the Intralinks VIA Pro Desktop Client, click the Intralinks VIA Pro icon in the Windows System Tray and select **Exit Intralinks VIA**.

Syncing will be halted. When you start the Desktop Client again, syncing will resume automatically.

Using Microsoft Outlook with Intralinks VIA Pro

You can use Microsoft Outlook email messages to create folders and add files and new participants to Workspaces.

If you are not logged into the Intralinks VIA Pro Desktop Client already, you will be asked to enter your email address and password when you choose to add files to a Workspace using Outlook. If you have chosen to launch the Intralinks VIA Pro Desktop Client when you start your computer, you are logged in when your computer starts up.

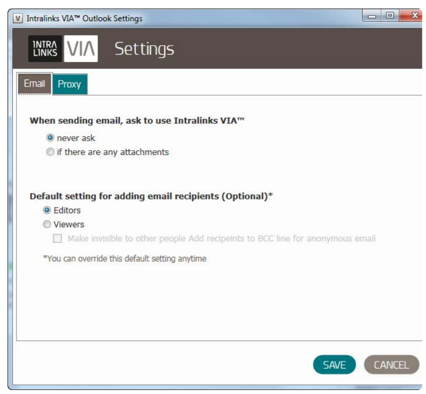
Getting started

You can use the **Settings** screen to determine your preferences for using Intralinks VIA Pro with Microsoft Outlook, configure proxy settings if your organization does not allow direct access to the Internet, and attach an error log to an email message that you can send to Intralinks customer support if a problem arises.

Displaying the Intralinks VIA Pro Outlook Settings screen

To display the **Settings** screen for Intralinks VIA Pro Pro for Microsoft Outlook, click the Intralinks VIA Pro **Options** icon on the ribbon bar on the main Outlook screen. (This icon appears at the right end of the ribbon bar or on a row of its own.) A menu will appear; click **Preferences**.

The **Settings** screen appears, with the **Email** tab selected.



*The **Settings** screen.*

Email tab

The **Email** tab allows you to set preferences for the way you will work with Intralinks VIA Pro.

When sending email ask to use Intralinks VIA Pro

You can choose whether the **Upload and Share** screen will be displayed when you send an email with a file attached to it from Microsoft Outlook.

- If you mark the **If there are any attachments** option, the **Upload and Share** screen will appear. Using this screen, you can select the options needed to add the files to your Workspace and share them with others.
- If you mark the **Never ask** option, the **Upload and Share** screen will not appear. Instead you will click the **Upload & Share** button at the top of your email message. When you click the button, options for sending your message will appear at the top of the message.

Default setting for adding email recipients (Optional)

Select the user role that will apply most often to the people with whom you will share files. Your selection here will appear as a suggested entry when you create new messages with attachments, but you can change the selection for individual messages if you like.

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

Click the **Save** button to save your changes and close the **Settings** screen, or click the **Proxy** tab to view more settings.

Proxy tab

If your organization uses a proxy server to manage connections to the Internet, you can use this tab to enter the settings needed for Intralinks VIA Pro to gain Internet access.

Contact your organization's IT team if you are unsure whether you need to make entries here and to obtain the information for these fields.

Be sure to click the **Save** button to save your changes.

Adding files using Outlook

Adding files to a Workspace is as easy as sending an email and making a few additional selections.

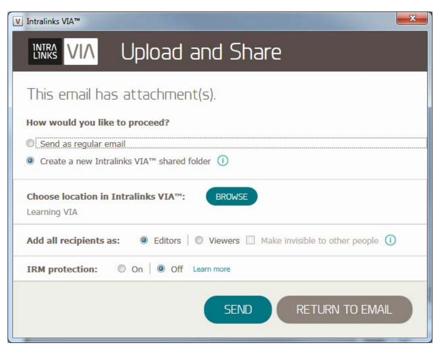
Note: If you marked the **Never ask** option on the **Settings** screen, files will not be added to Workspaces automatically when you attach them to your email messages. You can add files and folders manually, however. For more information, see "Manually adding files and folders using Outlook" on page 11.

1. Create an email message.
2. Address the message to the people you want to invite to the Workspace.

   Important! If you want each recipient to be invisible to all other recipients, be sure to put their addresses in the **BCC** field of the message to ensure that others will not see their names when they receive an email alert about the new file and folder.
3. Attach your files and add whatever comments you want to include. The text that you enter in the body of the email message will appear as a comment on the Workspace.
4. Click **Send**. The **Upload and Share** screen appears.
5. Mark the **Create a new Intralinks VIA shared folder** option.

   (If you do not want to add the files to a Workspace, mark the **Send as regular email** option and click **Send**.)
6. Click the **Browse** button. The **Select Location in Intralinks VIA Pro** screen appears.
7. If you want to create a new top-level folder, highlight the Workspace where you want the file to appear.

   If you want to place the new folder inside another folder on a Workspace, click the arrow next to the Workspace name and locate that folder and click on it to highlight it.
8. If you want to create a new Workspace and add the files to it, click the **Workspace** button. The **Create a New Workspace** screen appears, allowing you to enter a name and description for the Workspace. You also can set an expiration date for the



*The **Upload and Share** screen.*

Workspace if you like. When you have made your entries, click **Create**.

9. Click **Select** to return to the **Upload and Share** screen.
10. Choose a role for the invitees:

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

    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.)

    If you have not shared other folders or the Workspace as a whole with them, the recipients will have access only to the newly created folder and the files inside it.

11. Choose whether IRM (Information Rights Management) protection will be applied to Microsoft Office and PDF files being added to 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 documents. You can unshare protected files even after they have been downloaded; when a document is unshared, previously authorized individuals will no longer have access to it. Protected files cannot be modified in any way.

    If you want the files to be editable, turn off IRM protection.

    Keep in mind that you lose control of unprotected files when they are downloaded from the Workspace. After unprotected files are downloaded, they can be freely distributed without your knowledge or consent.

    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.

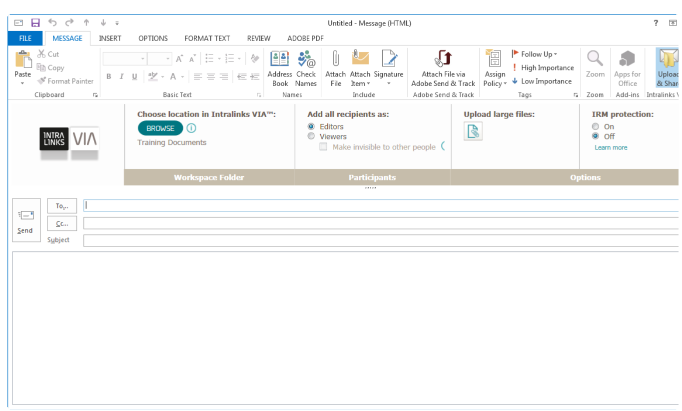
12. Click **Send**.

When you send your message, a new folder will be created in the location that you selected. The subject line of the message will be used as the folder name. An alert is emailed to the recipients, and they are assigned the role that you selected for this folder.

Manually adding files and folders using Outlook

If you marked the **Never ask** option on the **Settings** screen, attachments will not be added to Intralinks VIA Pro automatically when you send email messages. You can manually display the options needed to add the files to a Workspace, however.

1. To manually display the fields needed to add attachments to a Workspace, create a new email message in Outlook as you normally do, then click the **Upload & Share** button at the right end of the ribbon bar. Additional fields will appear at the top of the message.



An Outlook message with options for adding files to a Workspace.

2. Click the **Browse** button. The **Select Location in Intralinks VIA Pro** screen appears.

3. If you want to create a new top-level folder in an existing Workspace, highlight the Workspace where you want the file to appear.

   If you want to place the new folder inside another folder on an existing Workspace, click the arrow next to the Workspace name and locate that folder and click on it to highlight it.

4. If you want to create a new Workspace and add the files to it, click the **Workspace** button. The **Create a New Workspace** screen appears, allowing you to enter a name and description for the Workspace. You also can set an expiration date for the Workspace if you like. When you have made your entries, click **Create**.

5. Click **Select** to return to the message.

6. Choose a role for the invitees:

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

   Viewer – These individuals 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.)

   Important! If you want each recipient to be invisible to all other recipients, be sure to put their addresses in the **BCC** field of the message to ensure that others will not see their names when they receive an email alert about the new file and folder.

   If you have not shared other folders or the Workspace as a whole with them, the recipients will have access only to the newly created folder and the files inside it.

7. Choose whether IRM (Information Rights Management) protection will be applied to Microsoft Office and PDF files being added to the Workspace.

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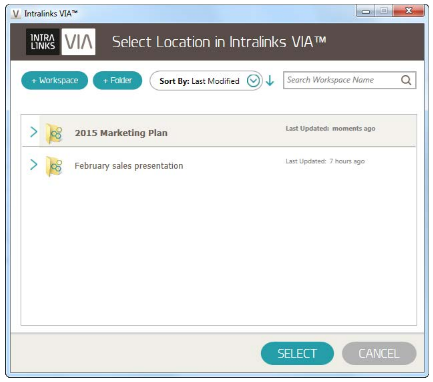
   If you want the files to be editable, turn off IRM protection.

   Keep in mind that you lose control of unprotected files when they are downloaded from the Workspace. When downloaded, unprotected folders can be freely distributed without your knowledge or consent.

   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.

8. Click **Send**.



*The **Select Location in Intralinks VIA Pro** screen.*

Adding large files

You can use Microsoft Outlook to add large files — up to 11GB in size — to Workspaces, even if your mail system limits the size of attachments.

1. Create a new message, but do not attach the large file to it.
2. Click the **Upload & Share** button at the right end of the ribbon bar. Additional fields will appear at the top of the message.
3. Click the **Upload large files** icon. A dialog box will appear allowing you to select the file you want. To select multiple files, press the Shift or Ctrl key while clicking on the files.

   When you have finished selecting files, click **Open**. The files will appear as attachments on the message.
4. Continue creating the message as you normally do and click **Send**.

Viewing newly added files in Intralinks VIA Pro for the Web

After you have added files to a Workspace, you can view them in Intralinks VIA Pro for the Web.

To display Intralinks VIA Pro for the Web from Outlook, click the Intralinks VIA Pro **Options** icon on the ribbon bar on the main Outlook screen. (This icon appears at the right end of the ribbon bar or on a row of its own.) A menu will appear; click **Launch Intralinks VIA Website**. The login screen for Intralinks VIA Pro for the Web appears.

After you log in, your Workspaces are displayed. Locate the Workspace where the new files are located and click on it. (Remember, the files are in a newly created folder whose title was the text that you put in the Subject line of your Outlook email message.)

To learn more about managing Workspaces in VIA Pro for the Web, please refer to the *Intralinks VIA Pro for the Web Startup Guide*.