Guide to IESO Workspaces

IESO Training
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1. Introduction

IESO Workspaces provides a modern, highly secure, file management platform that enables you to easily sync, secure and share content. IESO Workspaces limits risk for data loss or theft by enabling you to maintain full control over who can access files shared, and how they can work with them. The platform is powered by BlackBerry Workspaces.

Access IESO Workspaces via your browser, download to your PC or Mac, and install on your iOS, Android, or BlackBerry 10 device. Your content is synchronized across all platforms.

Note: The images used in this guide is taken from the IESO Workspaces web application. Mobile and desktop alternatives to IESO Workspaces are also available.

The available features, options, and menu items depend on your user permissions per workspace. The following roles determine what actions you can perform in IESO Workspaces:

Contributors

Contributors perform the following actions:

- Folder level: Add and delete folders, move files across folders, and move and rename folders.

- File level: Upload, move, rename, and remove files.

Visitors

Visitors can access workspace files depending on their permissions. Visitors cannot upload files to workspaces.

2. Getting Started

This section describes how to sign in to IESO Workspaces and introduces the user interface.

2.1 Accessing IESO Workspaces

You can log on to IESO Workspaces with your email and password. Access and authentication to IESO Workspaces is managed by IESO`s Identity Provider. Once authenticated, you will be able to click on the application tile for IESO Workspaces.

Figure 1: IESO Workspaces Tile in Okta

For details on how to log on and manage your account through IESO`s Identity Provider, please refer to the **IESO Gateway User Guide**, available on our Training web page. For assistance with your user email and password, please contact IESO Customer Relations.

2.2 Introducing the Home Screen

The web application user interface is divided into functional areas that make accessing, managing, and working with your content as easy as possible. After signing in, the home screen is displayed.

2.2.1 Main Content Area

The main content area of the home screen is organized into lists of files that are most likely to be accessed:

• **Pending read acknowledgement** - Files that require your acknowledgement before they are viewable.

• **Recent** - Files that you have recently accessed.

• **Favorites** - Files that you have tagged for quick access.

- **Shared with me** - Displays files that have been recently shared with you. Five files are displayed, but you can see them all by clicking Show all.
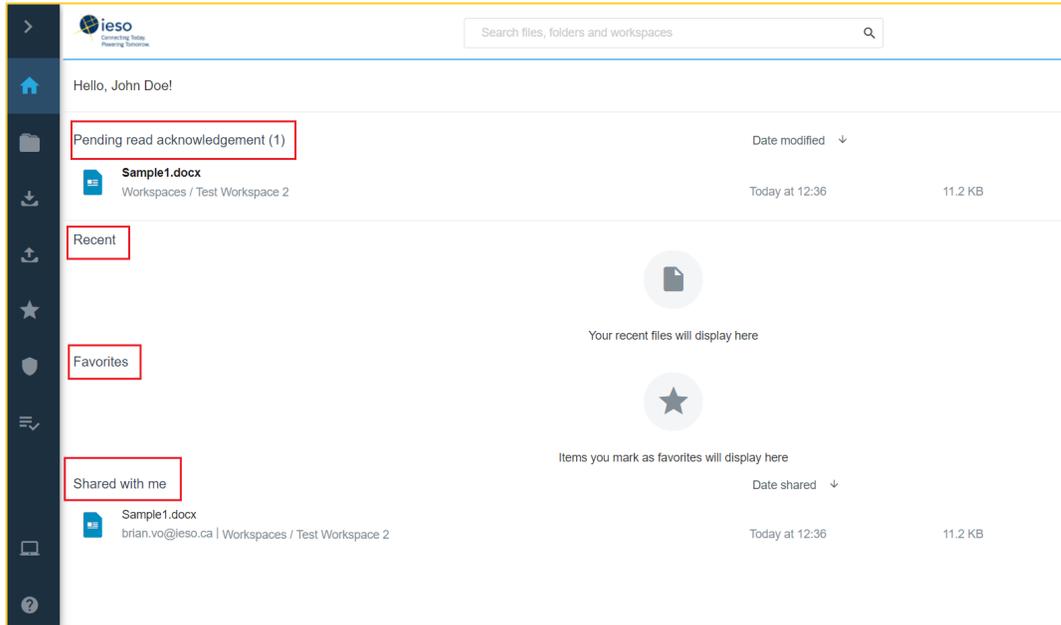

Figure 2: IESO Workspaces Main Content Area

2.2.2 Dynamic Action Menu

The dynamic action menu to the right of each item accesses the following file functions:

- View
- Copy link
- Download
- Add to favorites
- Go to folder
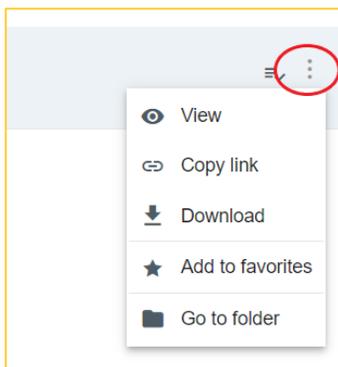
Figure 3: Dynamic Action Menu

2.2.3 Top Bar

The top bar lets you access the following functionality:

- **Search** - Allows you to search for files at and below the hierarchy of your current location.
- **Notifications** - Displays messages to the user for in-app events such as permission requests.
- **Account** - Manage your user account settings.

2.2.4 Navigation Pane

The navigation pane to the left allows you to navigate to various areas of the application, manage workspace/folder permission requests, download a copy of the BlackBerry Workspaces desktop application, and access help resources. The navigation pane is available from anywhere in the application.
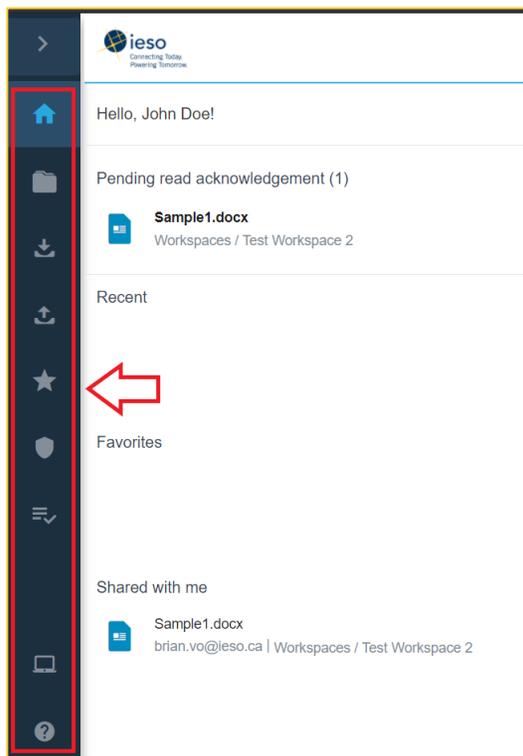
Figure 4: Navigation Pane

- **Home** - Displays the items that you have recently interacted with, Favorites, and the items that have most recently been shared with you.

- **Workspaces** - Access all workspaces to which you have permission.

- **Received Files** - Access files that have been sent to you from other users.

- **Sent Files** - Access files that you have sent to other users.

- **Favorites** - Access Workspaces, folders, and files marked as favourites.

- **Permission Management** - Manage permission requests for workspaces, folders, and files.

- **Download Desktop App** - Download the installation file for the desktop app.

- **Help** - Access documentation, take a virtual tour of the app, and contact the support team.

2.3 Access Your Workspaces

From the home screen, access your workspaces by clicking the workspaces icon from the navigation pane.

Use the following tools for easy navigation, access and management from the workspaces page:

Location bar - The location bar provides your current location at all times and the enhanced search feature to search across your workspaces for files, folders or other workspaces that contain your search terms.
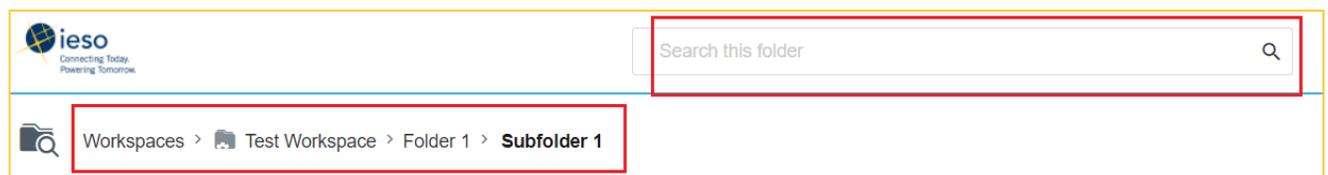
Figure 5: Location Bar

Action bar - Use the action bar available on each workspace to perform actions on the workspace such as share, delete, create and export the workspace log, or add to your favorites. The action menu options change dynamically depending on your workspace permissions.
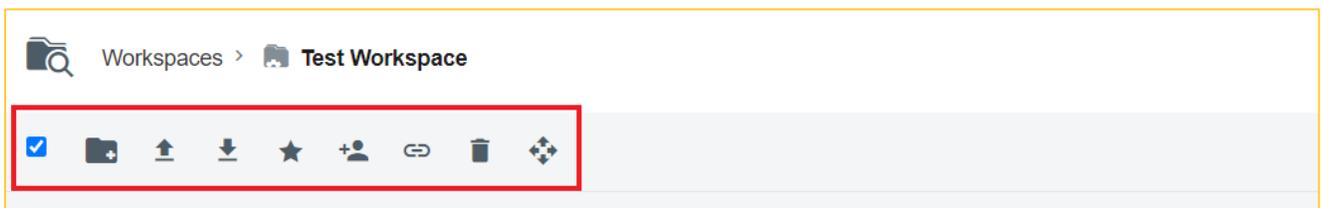
Figure 6: Action Bar

Management pane - View information about the selected item in the Management pane.
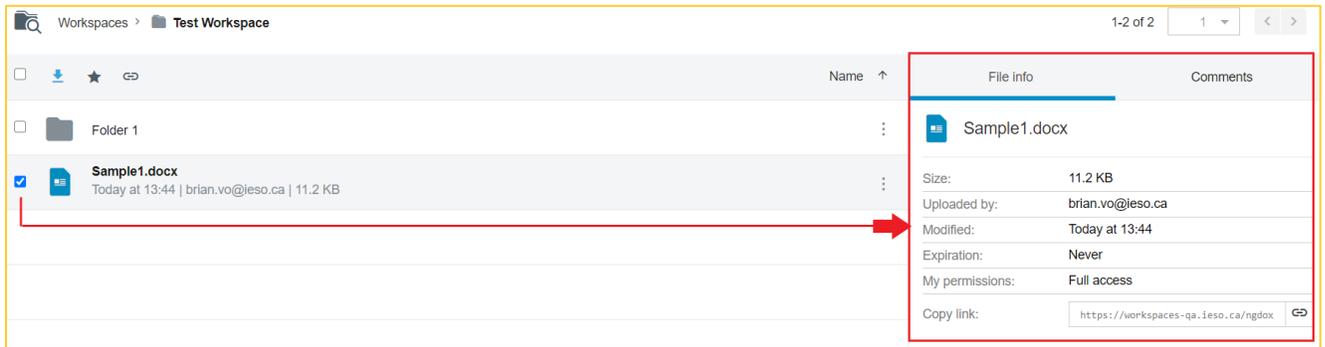
Figure 7: Management Pane Example

2.4 View and Manage Favorites

Marking a file as **Favorite** is an ideal method for highlighting files of importance to you. Workspaces, folders, and files marked as favourite display in the Favorites area of the Home screen, as well as on the Favourites page, which can be accessed through the left navigation bar.

To add a favorite, do one of the following:

- Click the dynamic action menu next to the file, folder, or workspace that you want to mark as Favourite, and select **Add to favorites**.
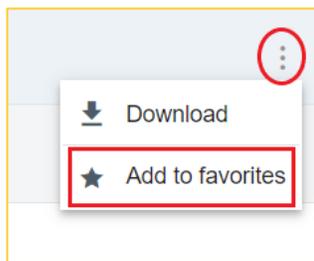
- Hover over the file, folder, or workspace, right click, and select **Add to favorites**.

2.5 Search for Workspaces, Folders, Files

From any location, type your search term in the search input box. As you type in the search field, the top 5 results display. If you want to view all search results, click **See all results**.
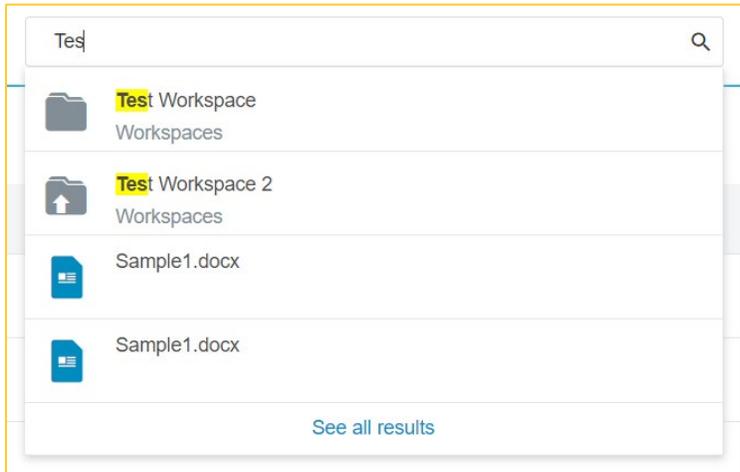
Figure 8: Example of Search Results

Note: You can search across all workspaces or within the context of a specific workspace or subfolder. Navigate to a specific workspace or folder if you want to limit your search to items within that scope.

2.6 Manage Your Account Settings

You can change your username, web application language, and set your file activity email setting.

1. Click **Account Settings** on the top bar.
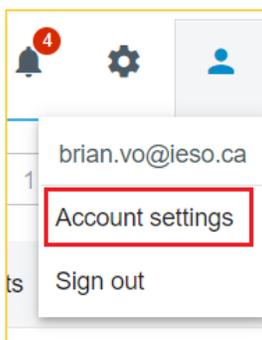
Figure 9: Choosing Account Settings in Dropdown Menu

In the **Name** field, type the name that you want to use for your account. The name you set here is used when you share documents, request access to files, and so on. By default, your name is your email address.

2. In the **Language** field, select the desired language.

3. In the **Notifications** field, select Web app notifications to enable notifications in the web app.

4. If you want to receive daily emails about the activity of your files, enable **Send me a daily file activity report** email.

5. Click Apply.

3. Managing Folders

Folders can be used to organize and manage the files within your workspaces.

3.1 Create a New Folder

1. Click a workspace name in the content area to access that workspace.
2. Click **New Folder** in the action bar.
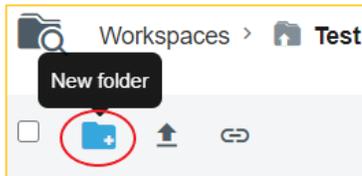
Figure 10: Action Bar New Folder Icon

3. Enter the **Folder name**.
4. Click **Create folder**.

> **Note:** A confirmation message confirms the operation. The new folder appears in the workspace. The new folder will inherit the permissions of the parent folder or workspace. Groups that have access to the parent folder/workspace will also have access to the new folder.

3.2 Upload a Folder

If you are using a Google Chrome browser, you are able to upload a folder and all of its contents from your local file system, by dragging the folder to your Workspaces content pane window.

1. In the web app, browse to the location where you would like to upload the folder.
2. Drag a folder from your local file system to the content pane window.
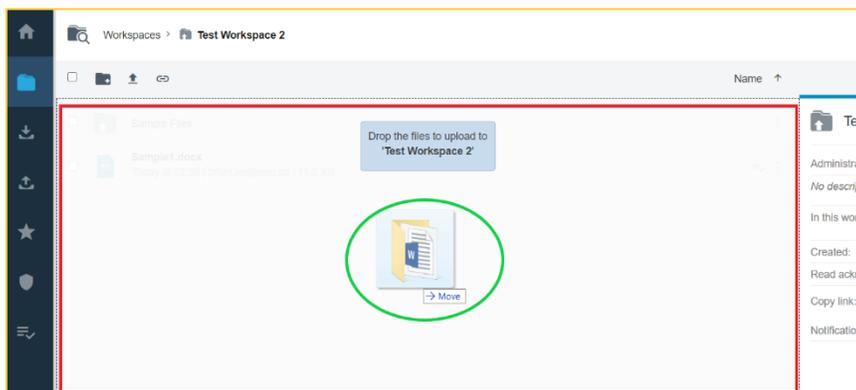
Figure 11: Upload by Dragging a Folder from Workstation to Content Pane

3. If you would like to notify members of the workspace about the new folder upload:
   a) Check **Notify group members and users**.
   b) Optionally, change the notification subject.
   c) Optionally, add a personal message.
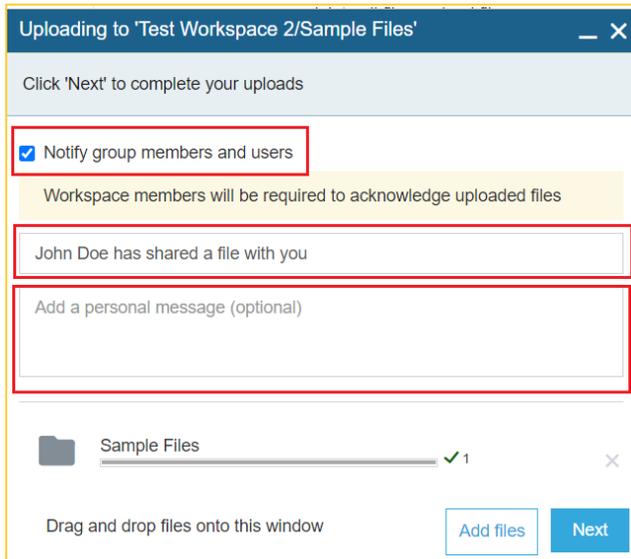
Figure 12: Example of Notifications Settings for Uploads

4. Optionally, click **Add Files** to select additional files to add to the new folder.
5. Click **Next**.
6. Click **Done**.

Note: This folder will inherit the permissions of the parent folder or workspace.

3.3 Download a Folder

You can download a folder and all of the files and sub-folders it contains to your computer.

1. Navigate to the folder you want to download.
2. Do one of the following:
   - Hover over the folder that you want to download, and select **Download**. The folder and its contents are downloaded with the highest level of permissions you have based on your role in this folder.

- Select the folder and in the action bar click and choose **Download**.
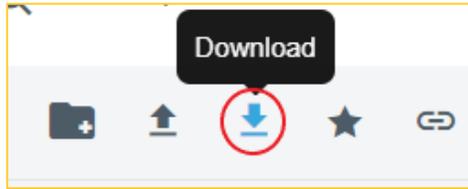
- From the folder entry, click on the dynamic action menu and choose **Download**.
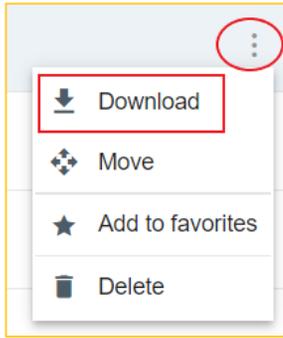
Figure 13: Choosing and Initiating Download for a Folder

Note: The folder is zipped and downloaded to your computer. If the folder has full access permissions, an unprotected copy is downloaded. If the folder is protected, a protected copy is downloaded and your ability to view, edit, print or copy the content is determined by the user permissions for the folder.

3.4 Rename a Folder

1. Navigate to the folder you want to rename.
2. Hover over the folder, and select **Rename**.
3. Click in the name field, and edit the name as desired.
4. Do one of the following:
   - To confirm, click on the **checkmark** icon.
   - To cancel, click on the **X** icon.

3.5 Move a Folder or File

Move folders and files to other folders in the workspace, or to the workspace itself. You can move one or a number of items at once. When moving folders, its sub-folders and files are also moved.

1. Navigate to the item(s) that you want to move.

2. Select the item(s), and in the action bar click and choose **Move**.
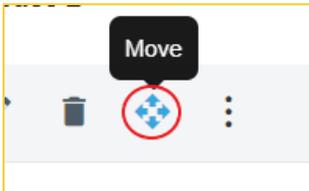
Figure 14: Action Bar - Move icon

3. Select the folder in the content list that you want to move the item(s) to, and then click **Move**.

3.6 Delete a Folder or File

Folders and files can be deleted by workspace members with the Administrators or Contributors role.

1. Navigate to the item(s) that you want to delete.
2. Check the item(s), and in the action bar click and choose **Delete**.
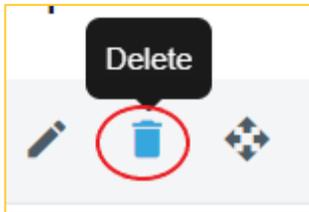
Figure 15: Action Bar - Delete icon

Note: The item(s) are moved to the Recycle bin and if necessary, can be restored later by a workspace administrator.

3.7 View Folder Information

When you select a folder, the **Folder info** tab is shown in the management pane to the right. The **Folder info** tab displays information about your selection, including the list of capabilities (such as upload, move, share, etc.).

1. In the content area, select the folder. The **Folder info** tab is displayed in the management pane.
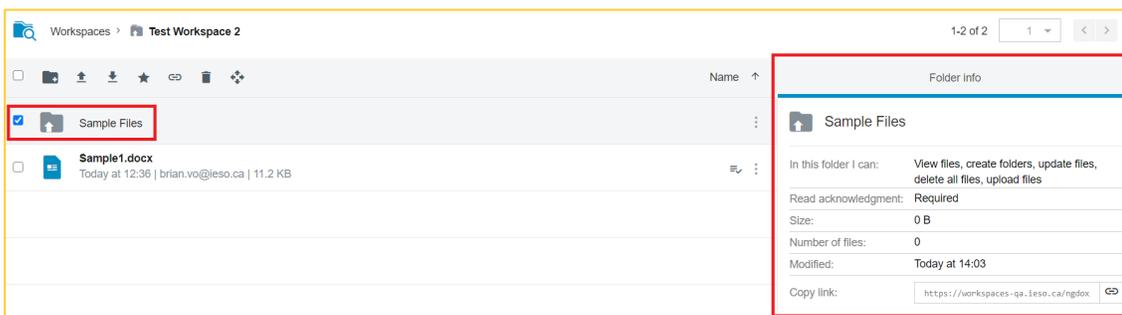

Figure 16: Example of Folder Info in Management Pane

2. Click the copy link icon to copy a link to the folder to share with others. The link is copied to your clipboard.
3. Paste and send the link as desired.

4. Managing Files

IESO Workspaces allows you to:

- Share a file

- Upload files to workspaces and folders

- Access previous versions

To view your files, open them in the online viewer, or download then open them in a native application.

4.1 Uploading Files

4.1.1 Upload a file

You can upload one or more files at a time to a workspace or folder.

1. Browse to the workspace or folder where you want to upload a file.
2. Do one of the following:
   - Drag the desired file to the desired location.
   - Click and choose **Upload** in the action bar.
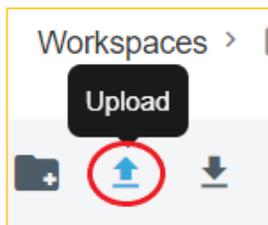

Figure 17: Action Bar – Upload Icon

Note: If you attempt to upload a file with the same name as an existing file at the location, you must choose to either update the existing file or keep both files.

3. Clear the **Notify group members and users** checkbox, if you do not wish to notify workspace members about the new files.
4. If desired, change the subject of the notification email.

5. To add a personal message to the notification, add your message in the Add a personal message box. By default, the permissions of the parent folder are assigned to each file.
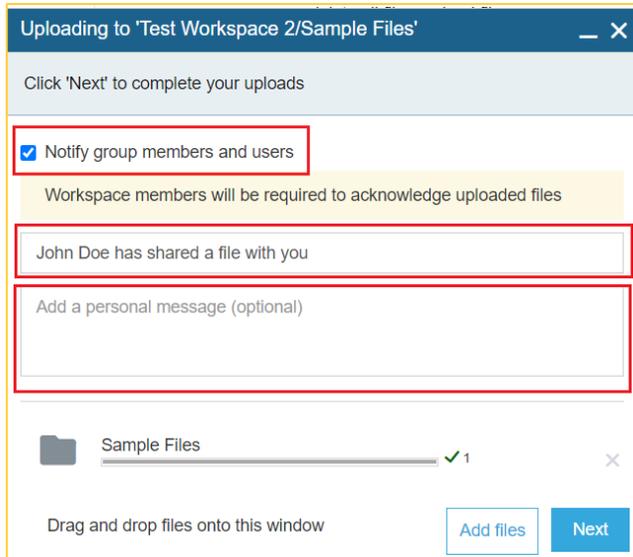

Figure 18: Upload Notification Personal Message Box

6. If you want to upload additional files, click **Add files** or drag the desired file to the Upload window.
7. Click **Next**.
8. Click **Done**.

The file(s) are uploaded. If you elected to send a notification of the uploaded file(s), an email notification is sent to everyone who has access to the folder.

4.1.2 Upload a New Version of a File

You can upload new versions of files in workspaces.

1. Browse to the file for which you want to upload a new version.

2. Next to the file, click on the dynamic action menu and choose **Upload new version**.
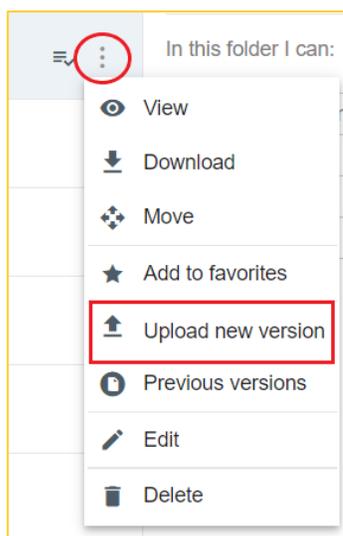
Figure 19: Upload New Version Selection in Dynamic Action Dropdown Menu

Locate and select the file(s) that you want to upload, and click **Open**.

3. To notify users that have access to this document, ensure that **Notify group members and users** is selected.

4. If desired, change the subject of the notification email.

5. If you want to send a personal message with the new version notification, enter your message in the Add a personal message box.

6. Click **Next**.

7. Click **Done**.

> **Note:** The new version replaces the existing file in the workspace. Should you need to roll back to an earlier version, you can do so at any time.

4.2 Download Files

1. Browse to the file that you want to download.
2. Do one of the following:
   - Hover over the file, then click **Download**. The file is downloaded with the highest level of permissions you have for your role in this folder.
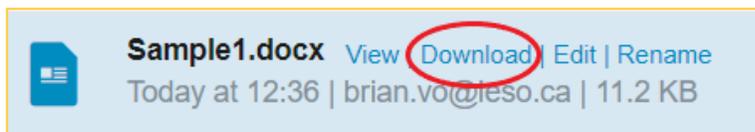
   - Select the file in the content list, then in the action toolbar click and choose **Download**.
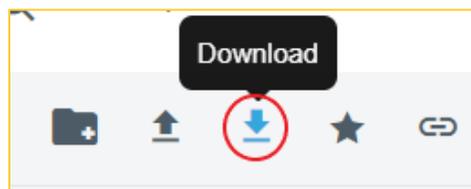
   - Click on the dynamic action menu and choose **Download**.
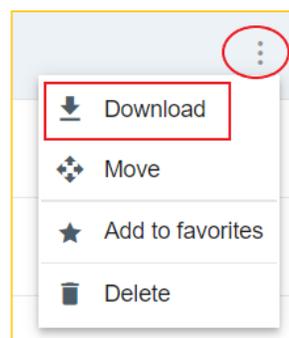
Figure 20: Download File Steps Example

4.3 Edit a File

You can edit Microsoft Office files if you have permission to do so. The web application launches the appropriate Microsoft Office app when you want to edit a file. If you have BlackBerry Workspaces for Windows on your computer, you can also open the files from your Workspaces sync folder and edit them.

Before you begin: Install BlackBerry Workspaces for Windows

1. Browse to the Microsoft Office file in the content area and do one of the following:
   - Hover over the file and click **Edit**.
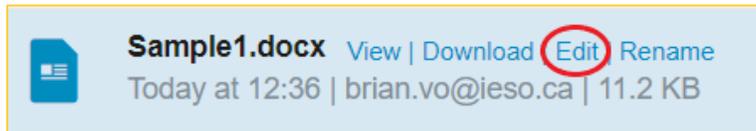
   - Select the file in the content list, then in the action toolbar click and choose **Edit**.
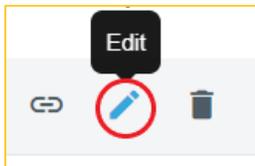
   Figure 21: Edit File Steps Example

2. To open the file in the appropriate Microsoft Office app that is installed on your computer, when prompted, open the BlackBerry Workspaces Launcher.
3. Edit and save your file.

4.4 View Files in the Online Viewer

You can use the online viewer to view Microsoft Office and .pdf documents in the browser without downloading them to your computer. You can add comments and annotations and share them with others.

> Note:
>
> Supported file types for online viewer:
>
> *.doc, *.docx, *.xls, *.xlsx, *ppt, *pptx, *.pps, *.ppsx, *.pdf, *.txt
>
> Image files:
>
> *.jpg, *.jpe, *.jpeg, *.gif, *.bmp, *.png, *.tif, *.tiff

Browse to the content area, and do one of the following:

- Click the filename.

- Hover over the file and click **View**.
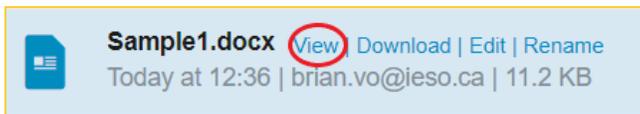
- Click on the dynamic action menu and choose **View**.
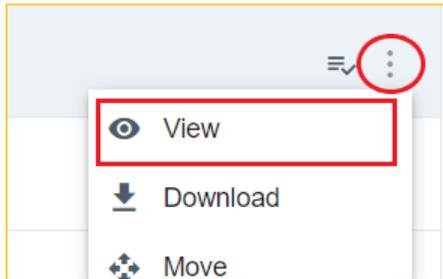
Figure 22: View File Steps Example

4.5 Working with File Versions

You can view a list of all versions of a file, open a previous version in the online viewer, and restore a file to an earlier version.

4.5.1 View Previous Versions of a File

You can view a list of the previous versions of a file. You can view the previous versions and download them if you have permission.

1. In the content area, locate the file that you want to view the previous version for.
2. Beside the file, click on the dynamic action menu and choose **Previous versions**. A list of the previous versions appears.
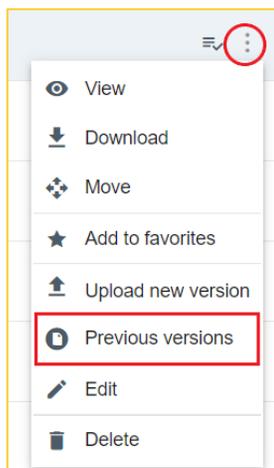

Figure 23: Viewing Previous Version of a File Dropdown Menu Option

3. Beside the version that you want to view, click on the dynamic action menu and choose **View**. The previous version is opened in the online viewer.
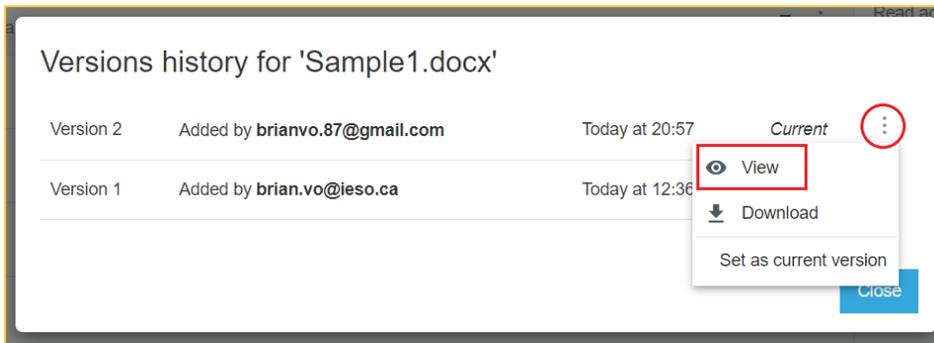
Figure 24: File Version History Window

4.5.2 Revert to a Previous Version of a File

When you revert to a previous version of a file, the previous version becomes the current version.

1. In the content area, locate the file that you want to revert to an earlier version.
2. Beside the file, click on the dynamic action menu and choose **Previous versions**. A list of the previous versions appears.
3. Beside a version of a file, do one of the following:
   - To preview this version, click **View**.
   - To revert to this version, click **Set as current version**.
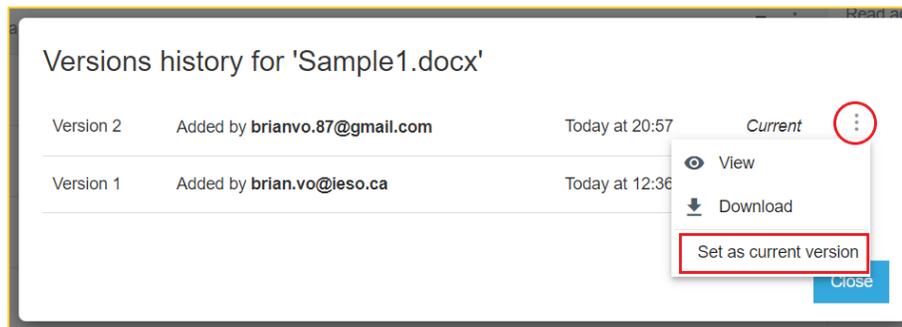
Figure 25: Reverting File Version Example

4.6 View Additional Information About Files

File information including size, upload and modification history, and your permissions for the file can be viewed in the File info tab of the management pane.

1. In the content area, select the desired file.

2. Access the file's **File info** tab in the management pane.
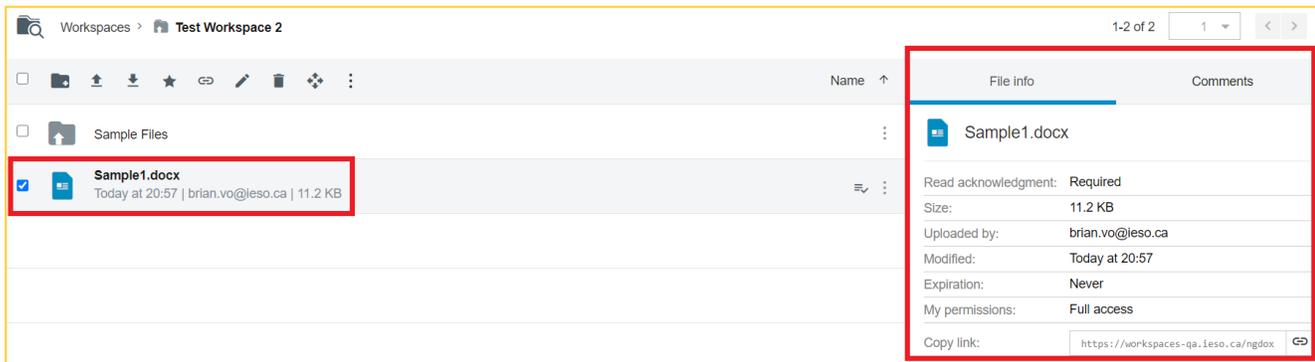
Figure 26: File Info Tab in Management Pane Example

3. Click the copy link icon to copy a link to the file to share with others. The link is copied to your clipboard.
4. Paste and send the link as desired.

4.7 Work with Multiple Files

You can select more than one file at a time to perform bulk actions. Actions that are common to all the selected files are available.

1. In the content area, browse to the desired location.

2. Choose a selection option:

Select - Use the checkbox beside each file to select a file or select multiple files one by one.

Select All - Use the checkbox at the top of the list to select all listed files.
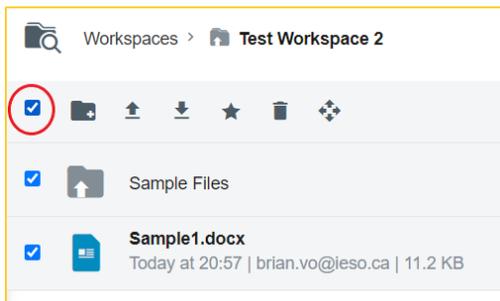

Figure 27: Multiple File Bulk Actions Example

3. After you finish, select an action to perform on the files.

5. Additional Information

For more information or assistance, please contact IESO Customer Relations:

Telephone (905) 403-6900

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