

# UBC Workspace 2.0: Using the Self-Service Portal

Using the Self-Service Portal to access and manage your content

Version 2.4, March 2021

Please note that Workspace 2.0 will be decommissioned on October 29, 2021. Faculty and staff who currently use Workspace 2.0 as a storage solution need to migrate all of their files off of the service and to another UBC supported storage service before then.

# Introduction

This user guide describes how to use the UBC Workspace 2.0 Self-Service Web Portal. User guide for Content Locker Sync, and further information about the Workspace 2.0 service can be found at the [UBC IT Workspace 2.0 Service Catalogue Page](#).

## Overview

Workspace 2.0 is an on-campus cloud based file sharing service. Workspace offers an easy and secure way for staff and faculty to share files, both internally and externally with colleagues, partners and clients, from any supported device. It also enables UBC to centrally deliver, manage and secure data, while complying with Canadian, provincial and UBC security requirements.

Workspace 2.0 is delivered using a product called “AirWatch Secure Content Locker”. This product provides the following services to help you manage, share, and access your content:

- **Self-Service Portal (SSP):** A web based portal that allows you to upload/download and manage sharing of content.
- **Content Locker Sync:** A program that keeps all content in Workspace 2.0 synchronized with a personal folder on your workstation (compatible with macOS and Microsoft Windows). The synchronization is bi-directional — changes made in Workspace 2.0 are synchronized to your personal folder, and changes in your personal folder on your workstation are synchronized into Workspace 2.0.

## User Types

**Organization Users:** Accounts for UBC Staff and Faculty are automatically created and maintained by UBC's identity management service – see [myaccount.ubc.ca](https://myaccount.ubc.ca).

No account changes (password, etc) can be made through the Workspace 2.0 service.

A valid UBC email address must be associated with your account in order for your Workspace 2.0 account to be active. Workspace must be able to reach you via email in order to function properly.

**External Users:** Assigned to accounts external to UBC whom you “invite” to use the service when you need to share the contents of a folder with them. An account will be automatically created the first time a user is invited and when you share content with them. They will receive an email notification containing information about the shared content and new account.

External users can only access data via the Self-Service Portal. Only a subset of the Self-Service Portal features and actions are available - they will vary depending on the sharing permissions granted when a folder is shared to them.

**Link Users:** Anyone with whom you've shared a download link to a file. No account is created in Workspace 2.0.

## Compliance and Appropriate Use

Only the components of the Workspace service required to provide a cloud-based file sharing service have been deployed. Use of certain features may be restricted or enforced to ensure that content is managed in compliance with Canadian, Provincial, and UBC security requirements.

Use of the service by any party implies their agreement to abide by the Workspace 2.0 Service [Terms of Use](#).

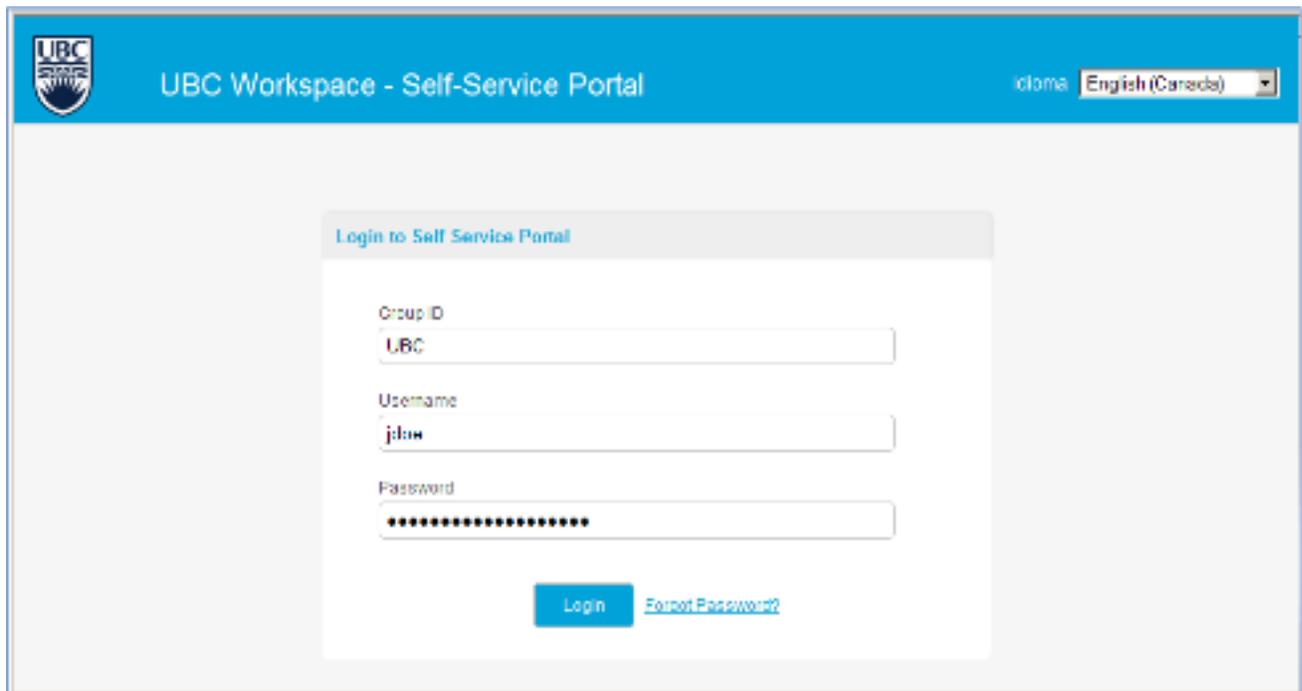
# Accessing the Self-Service Portal

The Workspace 2.0 Self Service Portal can be accessed from a compatible browser on your workstation or mobile device via

<https://files.workspace.ubc.ca>

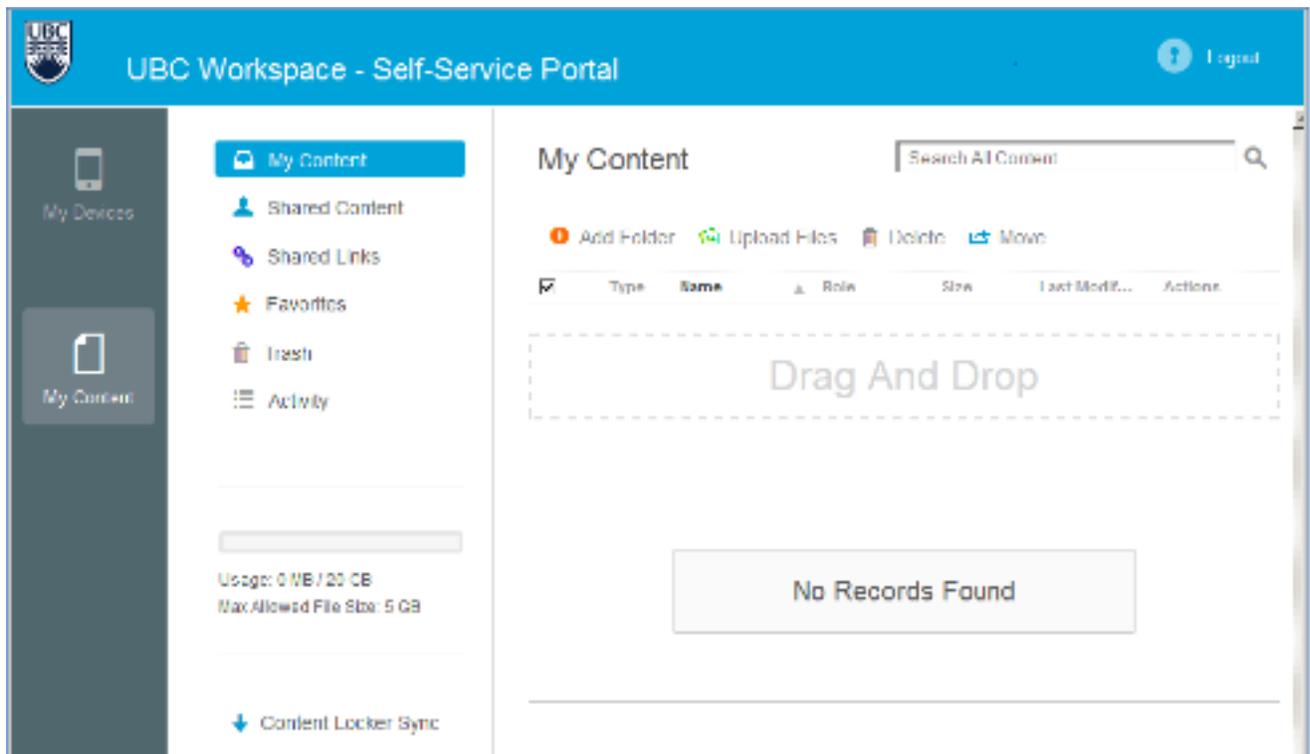
When prompted to log in, enter your “Group ID” (**ubc**) and appropriate credentials:

- UBC Staff and Faculty should enter their Campus Wide Login username and password
- External users should enter the credentials provided in the Workspace notification email



The screenshot shows the UBC Workspace - Self-Service Portal login interface. At the top left is the UBC logo. The page title is "UBC Workspace - Self-Service Portal". In the top right corner, there is a language dropdown menu set to "English (Canada)". The main content area features a "Login to Self Service Portal" form with three input fields: "Group ID" containing "UBC", "Username" containing "jtdw", and "Password" containing a series of dots. Below the fields are two buttons: a blue "Login" button and a blue "Forgot Password?" link.

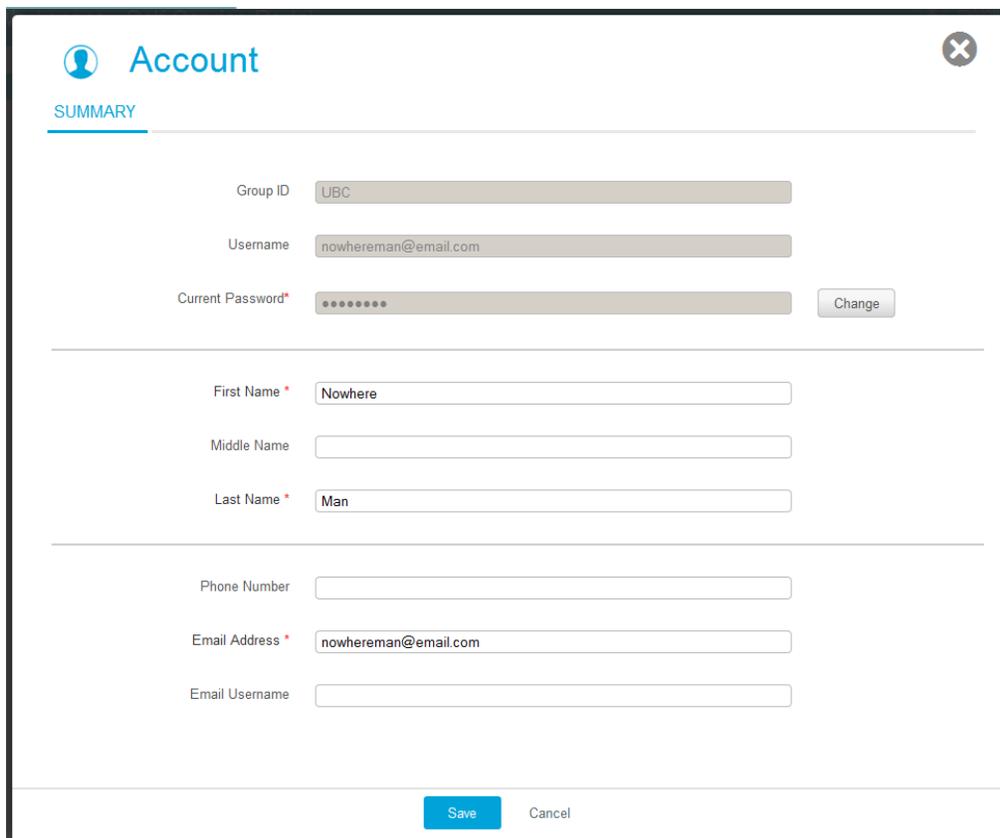
The Self Service Portal will open to the Personal Content Dashboard: “My Content”



# Managing Account Information and Password

Account and password information for UBC Staff and Faculty are integrated with Campus Wide Login (CWL) service. Changes to account information and passwords may be done via the [CWL myAccount portal](#).

External users can click on the  logo located at the top right side of the Self-Service Portal to manage account contact information and set or change their account password. Passwords should be changed immediately after the first login.



The screenshot shows the 'Account' page with a 'SUMMARY' tab selected. The page contains several input fields for account information:

- Group ID:** UBC
- Username:** nowhereman@email.com
- Current Password:** (masked with dots) with a 'Change' button next to it.
- First Name:** Nowhere
- Middle Name:** (empty)
- Last Name:** Man
- Phone Number:** (empty)
- Email Address:** nowhereman@email.com
- Email Username:** (empty)

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

# Using the Self Service Portal to Manage Personal Content

## In This Section:

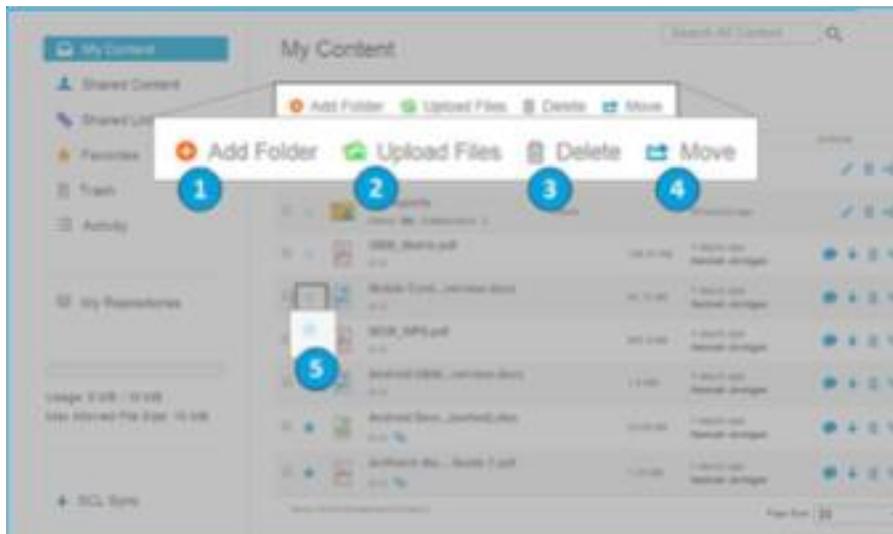
- **My Content: The Personal Content Dashboard:** The dashboard that allows you to manage your Workspace content.
- **Using the Actions Menu:** This section tells you about the actions you can perform on your files using the Actions Menu.
- **Managing Content Details:** This section explains how to edit existing file details.
- **Managing Shared Content:** This section teaches you how to manage shared folders, including who can see them and contribute.
- **Managing Shared Links:** This section tells you how to configure share settings for your individual files.
- **Managing Favorites:** This section explains how to view your favorite content.
- **Managing Trash:** This section teaches you how to see what you have recently deleted and restore it, if necessary.
- **Managing Activity:** This section tells you how to view recent activity of yourself and external users within the Self-Service Portal.
- **Managing My Repositories:** This section explains how to access any shared repositories that have been configured for you.

# My Content – The Personal Content Dashboard

Before continuing, ensure the personal content dashboard is displayed. If not, select “**My Content**” in the left menu bar.

The screenshot displays the 'My Content' dashboard within the 'Workspace Files - Self-Service Portal'. The top navigation bar includes the UBC logo, the portal title, and a 'Logout' button. The left sidebar contains navigation options: 'My Devices', 'My Content' (selected), 'Shared Content', 'Shared Links', 'Favorites', 'Trash', 'Activity', 'My Repositories', and 'Content Locker Sync'. A usage indicator shows 'Usage: 3.31 MB / 50 GB' and 'Max Allowed File Size: 8 GB'. The main content area is titled 'My Content' and features a search bar, action buttons ('Add Folder', 'Upload Files', 'Delete', 'Move'), and a table of items. The table lists two items: a folder named 'Brents external folder' and a CSV file named 'Workspace20Gb.csv' (v1.0, 3.31 MB, last modified 1 day(s) ago by 'Krusch, Chris'). Below the table is a 'Drag And Drop' area and a status bar showing 'Items 1-2 of 2 (0 selected of 2 items)' and a 'Page Size' dropdown set to 50. The footer contains the text 'Copyright © 2015 | Powered by AirWatch'.

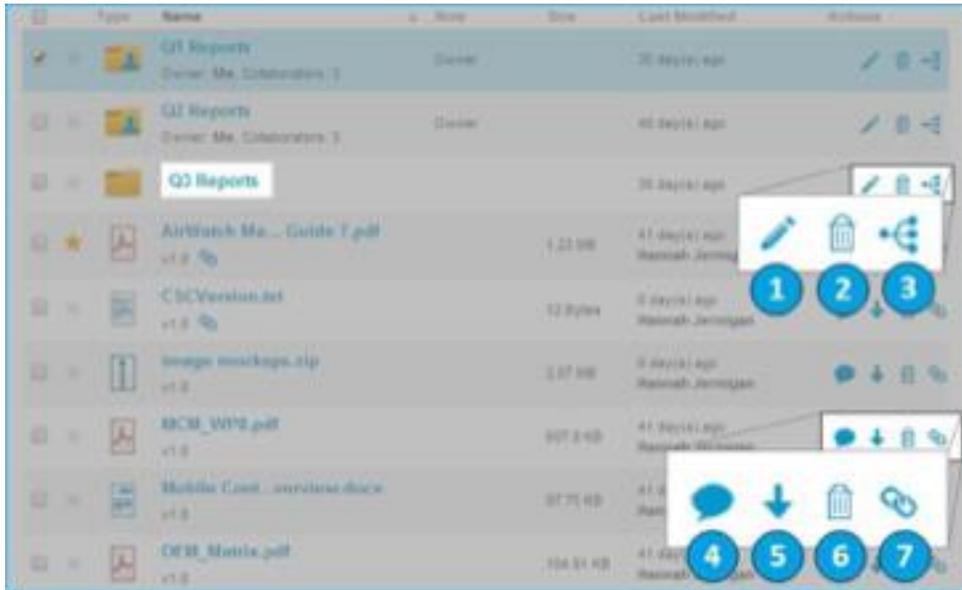
Along the top of the page is the My Content Menu. This menu gives you options to manage and organize your Workspace content.



1. **Add Folder:** Select and complete the fields to create a new folder:
  - a. **Name:** Enter a name for the folder that appropriately identifies its contents.
  - b. **Download Method:** Set to “Any” to allow files to download via any available internet connection or to “Wi-Fi Only” to limit roaming charges and data overages.
  - c. **Download While Roaming:** Select in conjunction with setting the Download Method to “Any” to allow unlimited data usage.
2. **Upload Files:** Select to open a file browser to locate and upload files from your computer into your Workspace repository. You can upload files of any type. Click the file name to display the Contents Detail page.
3. **Delete:** Select a file or folder from the list and click delete to move it to the trash.
4. **Move:** Select to relocate the folder within the Workspace repository.
5. **Favorites:** Add content to your favorites by selecting the star to the left of your file.

## Using the Actions Menu

The Self-Service Portal displays an Actions Menu for each file and folder it contains. The available actions differ for files and folders.



### Folder Actions:

1. **Edit:** Select the edit icon beside the desired folder to open a field where you can:
  - a. Change the **Name** of your folder.
  - b. Set the Download Method to “**Any**” or “**Wi-Fi Only**” from a dropdown menu
  - c. Enable **Download While Roaming**.
  - d. Enable **Force Encryption** to encrypt your folder.

2. **Delete:** Select delete to move content to the Trash. From the Trash, you can view your deleted files in a simple list that is sortable by filename, delete date or size.

Note: Restoring content previously located in a deleted folder places the file in the root directory.

3. **Share:** Select share to display the Share Settings Screen.

## **File Actions:**

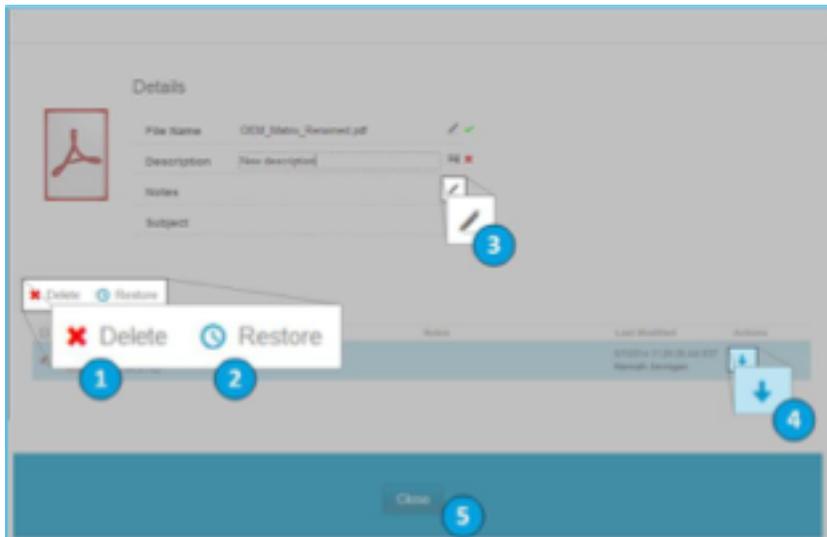
4. **Comments:** Click comments to add or view comments to the file. These comments are useful when you are collaborating with others.
5. **Download:** Click to download the file you wish to view.
6. **Delete:** Select delete to move content to Trash. From Trash, you can view your deleted files in a simple list that is sortable by filename, delete date or size.

Note: Restoring content previously located in a deleted folder places the file in the root directory.

7. **Share Link:** Select share link to display the Share Link Screen.

## Managing Content Details

You can edit, delete or restore any content by using the **Content Details Page**. To access the page, click the name of the file you wish to edit.



1. **Delete** – Select to move your file to Trash.
2. **Restore** – Select to restore previous file versions. Previous versions are retained for a period of 30 days.
3. **Edit** – Select to change content details. Click the pen icon to save. The content details you can edit include:
  - a. File Name
  - b. Description
  - c. Notes
  - d. Subject
4. **Download** – Save the file to your laptop.
5. **Close** – Return to the Personal Content Dashboard.

# Managing Shared Content

## Configuring Shared Folders

After selecting the **Share**  icon beside a folder in the list view, a screen displays where you can **Add Others** or **Invite New Users** to share folders with.



Use items 1, 2, and 3 to search for and add existing workspace users as collaborators for your shared folder.

1. **Add Others:** Type the user name or email address in the field. Suggestions of users automatically populate as you type. Add multiple users to the same role by separating their name or email address with a comma.

**Note:** *The search feature may not find all users that match your search criteria. To work around this issue, try adding an email address even if no user suggestions appear. If the email address is successfully added and the user was found - review and adjust their role as necessary. If the email address fails to add, you must invite them as a New User (please see step 4 below).*

2. **Role:** Change the status of each collaborator using the dropdown menu. Statuses include:
  - a. Co-Owner – Allow a collaborator to have full ownership in the folder (cannot be assigned to "External" accounts)
  - b. Editor – Allow a collaborator to make changes within the folder.
  - c. Reader – Allow a collaborator read only permissions.
3. **Add:** Adds the user (or users) as collaborators. Send them an email notification that you added them to your folder.
4. **Invite New User:** Select “Invite a new user” if you are unable to add a user via the "add" function on the main screen. Add in the required information in the screen that appears:

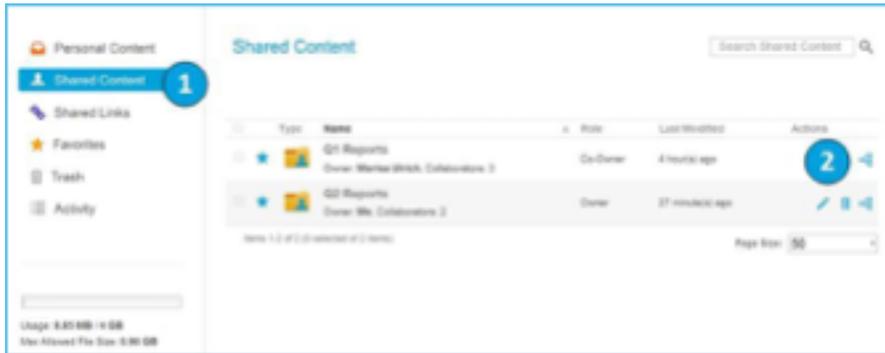
The screenshot shows a form titled "Invite New User" with a blue header. The form contains the following elements:

- 5** User Role: A dropdown menu currently showing "Editor".
- 6** First Name: A text input field with a red asterisk indicating it is required.
- Last Name: A text input field with a red asterisk indicating it is required.
- 7** Email Address: A text input field with a red asterisk indicating it is required.
- Below the email field, there is a "Password" label and a "Generate Automatically" link with an eye icon.
- 8** Save: A blue button.
- Cancel: A grey button.

5. **User Role:** Set the role as Editor or Reader.
6. **First/Last Name:** Provide the name of the person you want to add.
7. **Email Address:** Provide the email address so that the new user can receive a notification and access information for the shared folder.
8. **Save:** Creates an account for the new user with an automatically generated password. Sends an email to the user notifying them that you shared content with them, and providing the initial login information for the new account. The user will be asked to change their password the first time they log into the Self Service Portal.

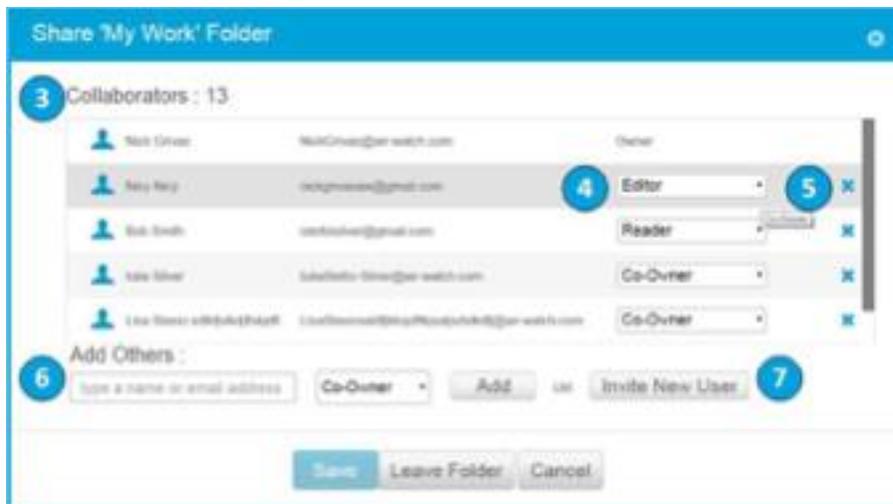
## Managing Shared Folders

The **Shared Content** view displays folders that you have shared, or that have been shared with you. From this view, you can see and change your role, as well as leave folders you no longer wish to collaborate in.



**1.Shared Content:** Navigate to this view in the Self Service Portal

**2.Content Share:** Select to access the folder sharing options



3. **Collaborators:** View the Name, Email and Owner status of each collaborator.
4. **Role:** Change the status of the collaborator using the dropdown menu.
  - a. **Co-Owner:** Allow a collaborator to have full ownership in the folder.
  - b. **Editor:** Allow a collaborator to make changes within the folder.
  - c. **Reader:** Allow a collaborator read only permissions.
5. **Delete:** Select this to leave a shared folder that you no longer need access to. You cannot leave a folder you are the owner of.
6. **Add Others:** Enter the email address of a new collaborator, set their role from the dropdown menu. Select “Add” to send a notification to those you shared the folder with. Suggestions of users automatically populate as you type. Add multiple users to the same role by separating their name or email address with a comma. Quick Tip: If you do not see the email address in the suggestions, you must Invite a New User.
7. **Invite New User:** Invite a new user if the name or email address does not auto-populate on the main screen. Complete the fields in the screen that appears.

## Configuring Shared Links

Please note that UBC has placed restrictions on the use of shared links to further enhance data security and align with UBC security policies. Links can only be valid up to a maximum of 30 days, and must have a password assigned to them. Both the link and password must be provided to the individuals that need to download the file.

When you select the Share  icon beside a file in the list view, a new window will pop up displaying the share link. Before you copy this link and share it with others, review the security settings underneath the link.

**Quick Tip:** If you are unable to configure any of the fields, default share settings were created by your administrator that you cannot override. If all the options listed below do not display as a configuration option that means that feature was not set up by your administrator.

## Share Usability.docx Link ✕

1

2 **Password Protect**   
Password\*   Show Characters

3 **Limit Days Available**   
Expire In Days\*

4 **View Only**

5 **Limit Number Of Downloads**  Current Downloads : 0 , Admin Max Downloads : 10

6

- 1.**Copy**: Copy the share link URL to provide to others
- 2.**Password Protect**: Enable password protection for the link. You must provide the password to those you share the link with.
- 3.**Limit Days Available**: Specify a numerical value for the file to Expire in Days. The maximum number of days you can specify is 30 days.
- 4.**View Only**: Enable this setting to prevent those that you share the link with from downloading the file.
- 5.**Limit Number of Downloads**: Specify the number for a Maximum Download Limit. This option does not appear when you enable View Only.
- 6.**Save**: Select to save your share configurations. Alternatively, select Unshare or Cancel.

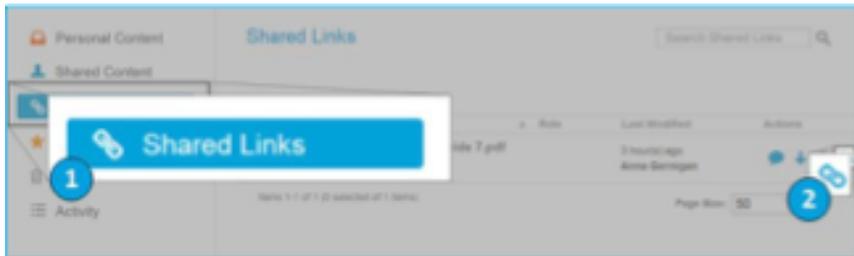
## Managing Shared Links

The **Shared Links** view only displays the links you have shared.

From this view you can search for shared links using the search bar, add comments, download or delete shared links.

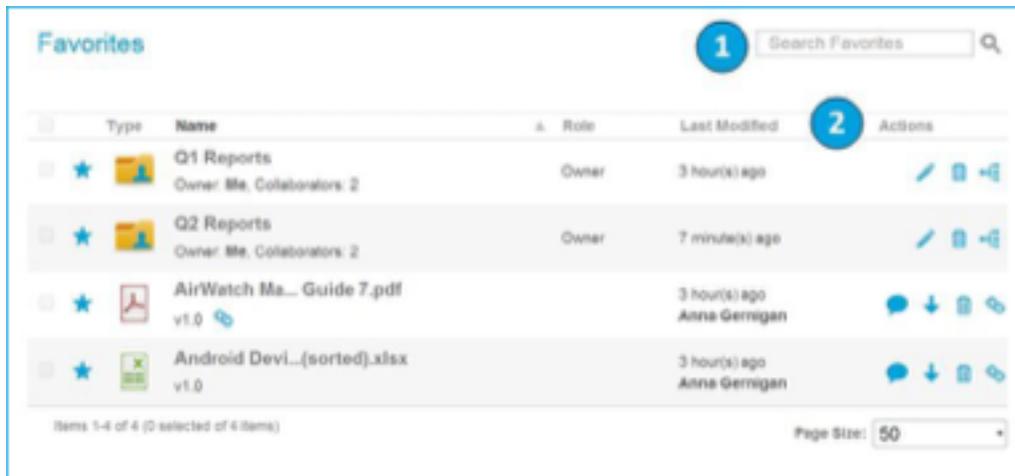
1.**Shared Links**: Navigate to this view in the Self Service Portal

2.**Link Share**: Select to edit the link sharing options you had previously configured.



## Managing Favourites

The Favorites view only displays content you or the administrator has “favourited”; your favourited content on your device is not displayed or changed.



**1. Search Favorites:** Enter keywords into the search bar.

**2. Actions Menu:** Utilize to add comments, download, delete, or reconfigure shared settings.

## Managing Trash

When content and folders are deleted from the Self-Service Portal, they are moved to the Trash container.



1.**Trash:** Navigate to the view in the Self-Service Portal.

2.**Restore:** Click to return content from the trash queue to its original location.

**Note:** Restoring content previously located in a deleted folder places the file in the root directory.

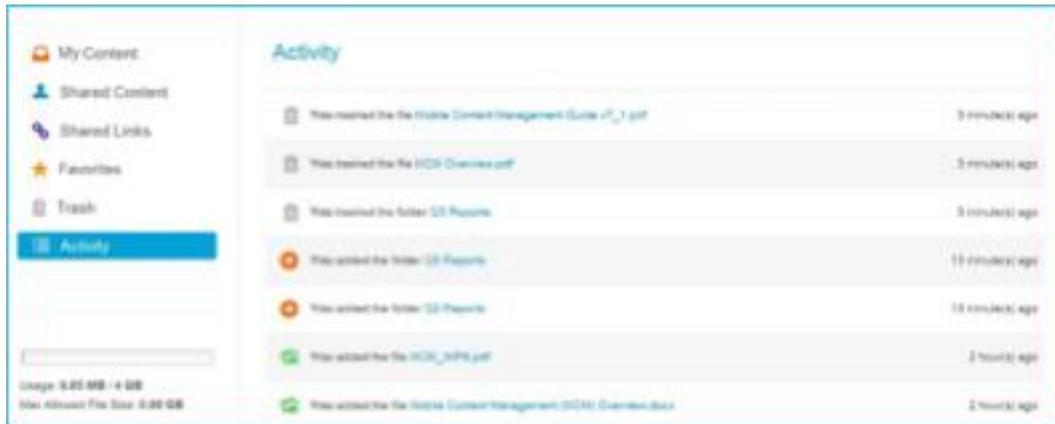
3.**Delete:** Click to permanently remove a file from your Trash.

4.**Sort:** View your deleted files in a simple list that is sortable by filename, delete date or size.

5.**Empty Trash:** Click to permanently remove all content from Trash. This feature is helpful if you exceed your Self Service Portal data storage limit, and wish to quickly create more storage.

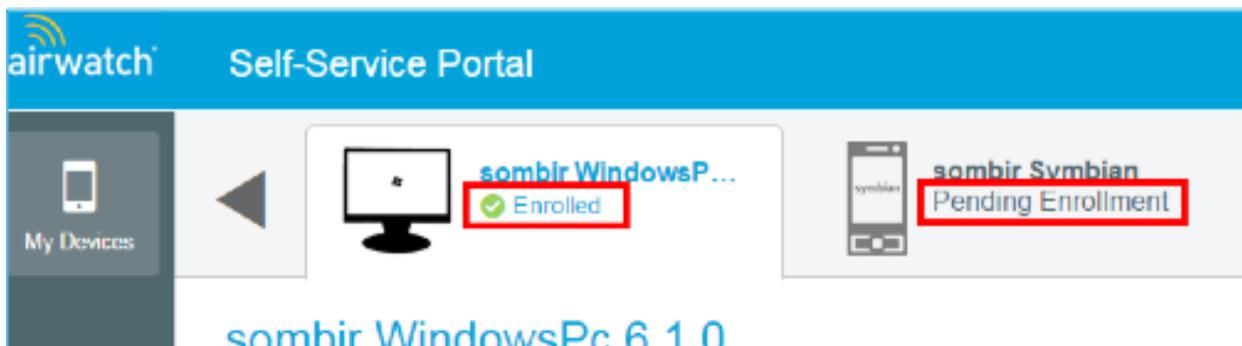
## Managing Activity

The Activity feed is a live stream of the most recent events that are taking place in your Personal Content. Use this view to see who made a change in the Self-Service Portal, what was changed, when and where the change was made.



## Using the My Devices Page of the Self Service Portal

The Device Management features provided by Workspace are not used or deployed; therefore, the My Devices page displays very minimal information about devices that have been used to access your personal content. There are no actions available.



## Need Additional Help?

For additional technical inquiries, please contact the [UBC IT Help Desk](#)