



Thank you for purchasing Symply Workspace XE

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Introduction to Workspaces

Congratulations on your purchase of Workspace XE appliance, which includes Workspaces user and project management solution for Workspace XE shared storage. This manual will guide you through the use of the Workspaces user and project management tool.

Workspaces turns the single large volumes managed by the Workspace XE appliance into a shared Workspaces. MacOS and Windows computers on the same network, which run the Workspaces Client driver can manage access through the Workspaces's web interface in order to create new Workspaces, mount their own or other users' Workspaces. Each Workspace is mounted as a separate local drive on the client computer (macOS and Windows).

Note: Workspaces client software is not compatible with Linux OS

A user can mount any number of Workspaces.

- Exclusively
- Single User Write
- Multi-user Write
- Multi-user Write, with Avid Bin-Locking Support

If a client computer sees the shared volumes from the Workspace XE appliance, users can create and work with Workspaces stored on them. Users do not have to authenticate themselves to access the respective file system but access it with the credentials specified on the Workspace XE appliance.

So, if Workspaces is deployed without security restrictions, access to a given Workspace depends solely on whether it is currently available or in use by another user. For the purposes of your workflow, you can utilize workspace permissions. When Workspaces is deployed in workgroup environment, you can use locally created Workspaces users and groups. When Workspaces is deployed in Active Directory domain environment, the permissions are specified for domain users and groups of users.

Workspaces further enhances your workflow with quotas, automatic parsing of content and generation of proxy media (via FFPG), browsing of Workspaces without mounting them, and creating Workspaces based on templates.

Workspaces Concepts

Workspaces Depot – the depot consists of the shared storage volume hosted on Workspace XE appliance, on which client computers create workspaces. The Workspace XE appliance is configured as standard either an HDD volume, a U.3 NVMe volume, and an optional E1.S NVMe volume.

The Workspaces and data on it remain inaccessible to computers without the Workspaces client driver installed, although they might see the underling shared volume depending on configuration of Workspaces.

Workspace – a virtual folder in the shared storage volume, which mounts as a local drive on client computers. A workspace has a name, description and tags, which can be edited and facilitate the faster browsing of the workspace contents. You can also star a workspace using one or more of the three available star colours and sort the list of workspaces by star colour.

The software automatically scans each workspace, after it has been dismounted and parses data in it to generate proxy media and allow searching by contents' metadata. On Windows client computers you can specify preferred mount point of a workspace. Unless security is disabled, access to each workspace is subject to authentication based on Active Directory or internal Workspaces user accounts. When security is disabled, access to a workspace depends only on the workspaces state - available or in use on another computer.

Workspace XE – the appliance on which Workspaces application is installed, which virtualizes the underlying volume(s). It allows users mounting each Workspace as a separate local drive. The Workspace XE optimizes the workflow by automatically parsing each workspace's data and generating proxy media. As default the Database server also resides on the Workspace XE appliance.

Workspaces web interface – the web interface where you can create and mount your own or other users' workspaces. Users with administrative accounts can also perform the initial Workspace setup and manage product settings, workspaces and monitor activity in the web interface.

Workspaces System Requirements

Computer system that you want to connect to Workspace XE using the software Workspaces Client software must meet the following minimum system requirements:

MacOS System Requirements:

- Apple Mac computer with 1.33-GHz CPU
- Mac OS X El Capitan (64-bit), macOS Sierra (64-bit), macOS High Sierra (64-bit), macOS Mojave (64-bit), macOS Catalina (64-bit), macOS Big Sur (64-bit Intel and ARM); macOS Monterey (64-bit Intel and ARM); macOS Ventura (64-bit Intel and ARM)

Note: No support for Mac OS X versions below 10.10.

- 25 MB of available disk space for Client software installation.
- 25GbE, 10GbE, 1GbE adapter for connection to the Workspace XE
- Network LAN connection (1Gb at least) for public communication (Network Port)
- The following TCP ports - 3000, 3001, 8555, 9120, 9121, 9122, 9123, 9124, 9125, 9126, 9127 - should not be blocked by a firewall if any.

Windows System Requirements:

- PC with 1.33-GHz processor
- 64-bit Microsoft Windows® 7/Server 2008 R2, Windows® 8/Server 2012/Server 2012 R2, Windows® 10/Server 2016/Server 2019, Windows® 11/Server 2022.

Important: Microsoft Windows® 7/Server 2008 R2 computers must run at least Service Pack 1 and have the KB3033929 security update installed

Note: No support for Microsoft Windows® 95, Windows® 98, Windows® NT, Millennium Edition, Windows® 2000, Windows® XP/Server 2003/Server 2003 R2 or Windows® Vista.

- 4 GB of physical RAM at least.
- 25 MB of available disk space for Client software installation.
- 25GbE, 10GbE, 1GbE adapter for connection to the Workspace XE
- Network LAN connection (1Gb at least) for public communication (Network Port)
- The following TCP ports - 3000, 3001, 8555, 9120, 9121, 9122, 9123, 9124, 9125, 9126, 9127 - should not be blocked by a firewall if any.
- The GlobalSign certification authority's currently used root certificate must be installed on the computer and its "Code Signing" purpose must not be disabled. For more information, refer to "Digital Certificate Requirements"

Important: Workspaces does not support Linux operating systems.

Installing the Workspace Client software

To download and install the Workspaces client driver (macOS and Windows):

1. In a web browser, access the IP address of the Workspace XE appliance through secure https connection (https).

For example, if the Workspace XE has the IP address 10.200.6.29, in the address bar of a web browser enter the following: <https://10.200.6.29>

2. On the home page of the Workspaces web interface, click the Downloads button in the upper right corner.
3. Find the Workspaces Client installation file for your operating system and click Download.
4. When the installation file downloads to your computer, double-click it to start the installation.
5. Follow the on-screen instructions and if prompted, restart your computer.

Note: On macOS, you will need to confirm that you allow the loading of the Workspace client kernel extensions. In Menu bar, you should manually allow the Workspace client software in the General tab of the Security & Privacy window in System Preferences.

Note: Additional security macOS Catalina (and later OS) may not allow you to open the Workspaces Client installation file by double-clicking it, because Apple cannot check it for malicious software, you must control-click it in Finder, choose Open from the menu, and then click Open in the dialog that appears.

To uninstall the Workspace Client driver from Windows:

1. Go to Applications | Workspaccs Client.
2. Double-click Uninstall.
3. Provide administrator's user name and password.
4. When prompted, confirm that you want to uninstall the Workspaces Client driver and then restart the computer.

To uninstall the Workspace Client driver from macOS:

1. In Control Panel, double-click Programs and Features.
2. Right-click Workspaces Client and select Uninstall.
3. When prompted to confirm that you want to remove Workspaces from the computer, click **Yes**. The uninstallation of Workspace Client warns you that you will have to restart the computer to complete the uninstallation.
4. Click OK.
5. When prompted, restart the computer.

Access the Workspaces Web Interface

You can access the Workspaces web interface from any computer, which is on the same network as Workspace XE. The web interface is accessible with most web browsers as long as JavaScript is enabled. To load the web interface in your browser you need to access the IP address of the Workspace XE through secure https connection (https).

You can download and configure a self-signed security certificate by Symply, allowing you to access the web interface through a universal URL instead of IP address and sparing you the need to confirm that you trust the security certificate each time. For more details, refer to “Configure the Web Interface Secure Connection Certificate”

Initially you can log in to the web interface only with the following automatically created administrative account:

Username = psadmin

Password = psadmin

Workspaces can set up for a workgroup environment, or an Active Directory domain. To login to the web interface as an administrator you must use:

1. In a Workgroup environment - an internally created Workspaces administrator’s account. For more information, see “Configure Workgroup Environment”
2. In a Domain environment - an account part of the Workspaces Admins group or any of its subgroups on your domain controller. For more information, see “Specify the Active Directory Domain”

Note: As default Workspaces is configured to be used in a Workgroup environment.

Important: Once you configure Workspaces for work in domain environment, you will not be able to use the default administrator’s account “psadmin”.

To access the Workspaces web interface:

1. In a web browser, access the IP address of the Workspace XE appliance through secure https connection (https).

For example, if the Workspace XE has the IP address 10.200.6.29, in the address bar of a web browser enter the following: <https://10.200.6.29>

2. Enter the username and password in the respective fields and then click .

Note: If you are logging in to the web interface as a domain user, it is advisable to provide the name without its domain i.e. “user” instead of “user@domain.com” or “domain\user”.

Initial Setup of Workspaces

Workspace settings can be configured only by a user with an administrative account. To see how to log in to the Workspaces web interface as an administrator, refer to “Access the Web Interface.”

Workspaces will automatically detect both the HDD volume, U.3 NVMe volume, and the E1.S NVMe volume, and the administrator can decide on which volumes enable Workspaces support.

Enabling/Disabling Support for Workspaces

The administrator can enable/disable support for Workspaces at any time. When support for Workspaces is disabled for a volume all the content becomes visible to any connected computer in the “twS” folder in the root of each volume and access to workspaces in this folder depends only on the security applied to the volume itself.

When you enable Workspaces support on a volume, you can also specify whether to hide this volume on Client computers, thus ensuring that the volume is used solely for storing Workspaces content.

To enable/disable Workspaces support on a volume:

1. Log in to the web interface with an administrative account and then in the upper right corner click the Settings button (cogs image)
2. In the left pane of the Settings page, click **Storage**
3. Select a Workspace XE in the list to display all volumes on the selected server with their details.
4. Do one of the following:
 - a. To enable Workspace support on a volume, select the “**Use with Workspaces**” check box.
 - b. To disable Workspaces support on a volume, clear the “**Use with Workspaces**” check box.
5. When prompted, confirm that you want to enable/disable Workspaces support on the selected volume.
6. Then select hide or unhide the volume from Workspace XE Clients
 - a. To hide a volume from Clients, select the “**Hide**” check box and then confirm, when prompted.
 - b. To leave the volume visible to Clients, clear the “**Hide**” check box and then confirm, when prompted.

Enable/Disable Security

Whether or not Workspaces is deployed in domain environment or workgroup environment, you can configure the access to Workspaces without any security restrictions for users. This means that as long as a volume share is accessible to any given computer, users can create workspaces on it and there are no restrictions regarding who can view and mount for editing a workspace as long as its state is “Available”.

You can switch your Workspace setup to a deployment with no security at any time. See “Enable and Disable Permissions”

Note: As default the Workspaces is configured to a Workgroup environment. Contact Symply support team if you wish the solution to be reconfigured for an Active Directory environment.

Configure Workgroup Environment

When Workspaces is configured to operate in workgroup environment, in which accesses depend on the permissions assigned to internally created Workspaces user accounts. Workspaces user accounts are stored in a database common for all client computers. Only users that log in with a valid Workspaces user account can create and work with workspaces. Additionally, if security is not disabled in Workspaces, in the web interface you can set the access permissions (owner, edit, view) of each workspace. For more information, refer to “Set Workspace Permissions.”

For more information about creating the Workspace user’s database, refer to “Managing Workspace User Accounts and Groups”

Managing Workspace User Accounts and Groups

When Workspaces is deployed in an Active Directory domain, the user accounts management is performed the way you would manage domain users – members of the “Workspaces Users” group and any of its subgroups can create and work with workspaces, while members of the “Workspace Admins” group or any of its subgroups on the domain controller can also manage Workspace settings. The only difference is that you specify the access permissions of domain users to workspaces through the Workspace web interface (see “Set Workspace Permissions”)

Note: As default the Workspaces is configured to a Workgroup environment. Contact Symply support team if you wish the solution to be reconfigured for an Active Directory environment.

When you deploy Workspaces in workgroup environment, to let users create and work with workspaces and to benefit from workspace permissions, you need to create and manage an internal database with user accounts. Each user account is defined by a username, password, and account type - User (the user can work with workspaces) or Administrator (the user can work with workspaces and manage Workspace settings).

To facilitate you in assigning workspace permissions, Workspaces also allows you to unite users into groups and instead of specifying the permissions of each user for a given workspace, assign permissions to the whole group.

You cannot modify user accounts and groups after you create them. You can change the following parameters of a user account - password, type (User or Administrator) and groups the account is member of. You can change the following parameters of a user group - type (Users or Administrators) and members (add or delete users).

Note: You cannot rename Workspace users or groups. To change the name of a user or group, you have to delete it and then create it anew with the new name.

In case a user account is member of both a group of Administrators and a group of Users, the user gains administrative rights and can manage Workspace settings. Should you decide to change the type of an account from Administrator to User, Workspaces automatically removes the user account from all groups of Administrators that it has been part of.

To create a Workspace user:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button.
2. In the left pane of the Settings page, click **User Management**.
3. In the upper right corner of the web interface, click the **Create User** button
4. In the New User dialog, do the following:
 - a. Enter the user name and password in the corresponding fields.
 - b. In the Role drop-down box, select User or Administrator.
 - c. In Available Groups, click the + button of a group to add it to the list of groups the new user is member of.
5. Click **Save**.

Tip: To remove a group from the list of groups the new user is member of, click the – button in the group badge.

To create a Workspace user group:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **User Management**.
3. In the upper right corner of the web interface, click the **Create Group** button
4. In the New Group dialog, do the following:
 - a. Enter the group name in the corresponding field.
 - b. In the Role drop-down box, select User or Administrator
 - c. In the list of existing user account, click the + button of a user to add it as a member of the new group.
5. Click **Save**.

Tip: To remove a user from the group, click the - button in the user badge.

Important: Adding an existing group as a sub-group of the group you are currently creating is not supported.

To modify a Workspace user account:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **User Management**.
3. In the list of users and groups, click the account you want to modify.
4. In the details pane on the right, click **Settings**.
 - a. To change the password of the user, enter the new password in the corresponding fields.
 - b. To change the type of the user, select User or Administrator in the Role drop-down box.
 - c. To add the user to a group, click the + button next to a group name in the list of groups.
 - d. To remove the user from a group, click the - button next to the group name in the "Member of" list.
5. Click **Save**.

Important: If you change the type to User, but that account is member of Administrators group(s), Workspaces automatically will remove the account from all groups of Administrators.

To modify a Workspaces user group:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **User Management**.
3. In the list of users and groups, click the group you want to modify.
4. In the details pane on the right, click Settings.
 - a. To change the type of the group, select User or Administrator in the Role drop-down box.
 - b. To add a user to the group, in "**Available accounts**" click the + button next to a user.
 - c. To remove a user from the members of the group, in "**Members**" click the - button next a user.
5. Click **Save**.

Important: Adding an existing group as a sub-group of the group you are currently modifying is not supported.

To delete a Workspace user:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **User Management**.
3. In the list of users and groups, click the account you want to remove and click the **Delete** button
4. Confirm that you want to delete the user, when prompted.

The deleted user no longer has access to the depot and to workspaces even if that user is the owner of these workspaces. It is advisable to assign another user as owner of the deleted user's workspaces

Tip: You can perform the operation on multiple users simultaneously by selecting them in the list while holding down the Ctrl or Shift keys on your keyboard or by using the Up or Down arrows on your keyboard and selecting the users using the space bar, while holding down the Ctrl or Shift keys.

To delete a Workspaces user group:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **User Management**.
3. In the list of users and groups, click the group you want to remove and click the **Delete** button
4. Confirm that you want to delete the group, when prompted.

The members of the deleted group no longer have access to workspaces, for which permissions have been specified for the deleted group and not for each individual user.

Tip: You can perform the operation on multiple users simultaneously by selecting them in the list while holding down the Ctrl or Shift keys on your keyboard or by using the Up or Down arrows on your keyboard and selecting the users using the space bar, while holding down the Ctrl or Shift keys.

Manage Workspace Settings

Enable/Disable Workspace Quotas

The workspace quotas setting allows you to specify the maximum size of a workspace on the underlying file system in the depot. The quota you specify does not reserve space on the file system but serves just as a limit to the size of the workspace. Thus, whenever a user attempts to write new files to a workspace, which has reached its quota, Workspaces displays a message that there is not enough free space, although the underlying volume may have more free space. You can specify a quota that is bigger than both the free space on the volume and its overall size, which will indicate that there's no limit for the size of the specific workspace.

Similarly, a workspace without quota setting can take as much space on the volume as possible. Workspaces does not calculate the sum of all quotas you specify - should the underlying volume run out of free space, even if a workspace has not reached its quota limit, users cannot write new data to it.

Note: Once workspace quotas are enabled, only administrators can create new workspaces on volumes and move existing workspaces between volumes.

You can enable and disable workspace quotas at any time. When workspace quotas are enabled after there are workspaces already created or imported, it is advisable to set a quota for each of them. Once you disable quotas the quota setting is lost and you will have to manually assign a quota to each workspace, should you decide to enable them again.

To enable/disable workspace quotas:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**
3. In the General Settings page, do one of the following:
4. To enable workspace quotas, select the "Enable quota" check box.
 - a. To enable workspace quotas, select the "Enable quota" check box.
 - b. To disable workspace quotas, clear the "Enable quota" check box.
5. Click **Save**.

Administrators can assign a quota of workspace when creating it or change its existing quota, following the steps in "Change The Workspace Quota"

Restrict Users from Creating Workspaces

By default, both users and administrators can create new workspaces. When workspace quotas are enabled, only administrators can create new workspaces. To restrict users from creating new workspaces volume that do not have quotas enabled, you can set Workspace to allow only administrators to create workspaces.

To specify who can create new workspaces:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**.
3. In the General Settings page, do one of the following:
 - a. To restrict users from creating new workspaces, select the “Only admin users can create workspaces” check box.
 - b. To allow users to create new workspaces, clear the “Only admin users can create workspaces” check box.
4. Click **Save**.

Note: When workspace quotas are enabled, users will not be able to create new workspaces on volumes, even if this check box is cleared.

Controlling Exclusive Mounts of Workspaces

Workspaces provides users with the option to mount a workspace for editing with Exclusive permissions i.e. not letting any other computer mount it for editing or viewing until the workspace state is again Available, regardless of the type of the workspace. The administrator can control whether this option should be available to users or not.

To enable/disable Exclusive mount of workspaces:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**.
3. In the General Settings page, do one of the following:
 - a. To enable Exclusive mount of workspaces, select the “**Enable exclusive mounts**” check box.
 - b. To disable Exclusive mount of workspaces, clear the “**Enable exclusive mounts**” check box.
4. Click **Save**

Specify New Workspace Defaults

By default, when you create a new workspace, you are prompted to specify the workspace write type and volume. You can specify default values for these workspace parameters, which will be pre-selected in the New Workspace dialog. When creating a new workspace, the user will still be able to select different parameters. You can change the workspace defaults or revert to using no defaults at any time.

To specify new workspace defaults:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**.
3. In the “**Default write type for new workspaces**” drop-down box, select the desired type.
4. In the “**Default volume for new workspaces**” drop-down box, select the volume from the list or select Auto to make Workspace create the workspace on the volume with most free space.
5. Click **Save**.

Enable and Disable Automounting of Workspaces

By default, users can pin a workspaces, which allows them to automatically mount them each time they log in to the web interface as long as it is not already mounted on another computer. For more information about pinning workspaces, see “Pin a Workspace”

As a Workspaces administrator you can disable automounting of workspaces, letting users mount them only manually in the Workspaces interface.

To enable/disable workspaces automount:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**.
3. In the General Settings page, do one of the following:
 - a. To allow users to pin workspaces, select the “**Enable automount**” check box.
 - b. To disallow pinning of workspaces, clear the “**Enable automount**” check box.
4. Click **Save**

Enable and Disable Permissions

Regardless of the whether you deploy Workspace is a workgroup (default) or an active directly environment, you can select whether to use permissions (none, read, write, owner) for access to the workspaces or not. If permissions are disabled, the access to workspaces depends only on the current state of the workspace – Available (you can mount the workspace for editing or viewing) or In Use (you can mount the workspace for viewing only).

When permissions are enabled in domain environment, you must specify the access permissions for each workspace of domain user accounts. When permissions are enabled in workgroup environment, you must specify the access permissions for each workspace of internal Workspaces user accounts.

To enable/disable permissions:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**.
3. In the General Settings page, do one of the following:
 - a. To disable permissions, select the “**Disable workspace permissions**” check box.
 - b. To enable permissions, clear the “Disable workspace permissions” check box.
4. Click **Save**

Managing Proxies

Managing the proxies means to enable or disable the generation of proxy media. By default, Workspaces generates proxy media for all media files in the workspaces in order to facilitate previewing workspaces’ contents without having to mount them. Proxies are generated by the pre-installed parsers for most media files.

When proxies generation is enabled, Workspaces XE scans for media without proxies in a workspace each time that workspace is unmounted from the last computer that has mounted it for editing. You can force the generation of proxies for a workspace with no proxy media generated so far, by rescanning it (see “Rescan a Workspace”).

Workspaces also allows you to manually manage proxies by monitoring the progress of the queue and of individual proxy files, by pausing and starting the processing of the proxies queue. You can also delete all generated proxies or just the proxies associated with a specific workspace.

To enable/disable proxies generation:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click General Settings.
3. In the General Settings page, do one of the following:
 - a. To enable proxies generation, clear the “**Disable proxy generation**” check box.
 - b. To disable proxies generation, select the “Disable proxy generation” check box.
4. Click **Save**

To pause/resume the proxies queue:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **Proxy Queue**.
3. In the Proxy Queue page, do one of the following:
 - a. To pause the proxies generation, in the upper right corner of the web interface click the **"Pause"** button.
 - b. To resume the proxies generation, in the upper right corner of the web interface click the **"Play"** button

Note: Proxy Queue menu is not available, if a Workspace XE administrator has disabled the generation of proxy media.

To delete all proxies in the Workspace depot:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **General Settings**.
3. Under Proxy, click **Delete All Proxies**.
4. Confirm that you want to delete all proxies

To clear the proxies of a workspace:

1. Log in to the web interface with an administrative account.
2. In the web interface, select a workspace in the list and in the workspace menu. Click **Clear Proxies**.
3. Click Continue to confirm that you want to delete the proxies of this workspace.

Configure and Manage Bridge Integration

Bridge is an optional licensed tool that allows Workspace XE to manage the data lifecycle of content stored on the Workspace XE. If you have this Bridge license applied, to use the data lifecycle tool you must enable support for Bridge on the volume(s) hosting the workspaces depot and then also configure the parameters of the data lifecycle management mechanisms you want to use.

From the Workspace Web Interface you can:

- add or remove the depot on a volume/share as a source
- pair a source with a target
- configure global replication policy or overwrite it for a specific pair source and target
- configure a workspace as a location, excluded from Bridge replication
- perform manual data lifecycle operations on a workspace - manually replicate or archive data, reclaim space, retrieve data from the target, etc.
- monitor the Bridge status of a workspace - replicated, archived, reclaimed
- view Bridge statistics about data

For configuring more advanced setting within Bridge such as reclaiming, data archiving, active sync, data versioning, etc... Please contact the Symply support team.

Enable/Disable Bridge Support

To manage workspaces' data with Bridge, you need to add Bridge as a source the depot on each Workspace XE volume that contains workspaces.

To add a volume/share as a Bridge source:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **Bridge** and then **Bridge Sources** below it.

The page lists all already added sources. Clicking a source in the list, displays information about its replication policy, the target it is paired with as well as Bridge statistics about data on that source.

3. In the upper right corner of the web interface click the **Add Bridge** source button
4. The Add Bridge Source lists all Workspace XE volumes with enabled Workspaces support.
5. Select a Workspaces managed volume. The new source appears on the Bridge Sources page with "Unconfigured" status. To complete its configuration, you must pair it with a target.

To remove a source:

1. Log in to the web interface with an administrative account and then in the upper right corner click the Settings button
2. In the left pane of the Settings page, click **Bridge** and then **Bridge Sources** below it. The page lists all already added sources. Clicking a source in the list, displays information about its replication policy, the target it is paired with as well as Bridge statistics about data on that source.
3. Next to a source in the list, click the Remove source button and confirm when prompted

Pair a Bridge Source with a Bridge Target

To complete the configuration of a source, you must pair it with a target.

Note: Refer the Symply support site for details of supported targets and the prerequisites about each of them.

To change the target of a source, you need to delete the previously assigned target and then pair the source with a new target following the same steps.

To pair a source with a Bridge target:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **Bridge** and then Bridge Sources below it. The page lists all already added sources.
3. Select a source with Unconfigured status in the list and below Target in the Details pane, click **Add**.
4. In the Add Bridge Target dialog, click the Public Cloud or On Premises tab and select the target type, then click **Next**.
5. Fill in the required target details and then click **Submit**. The target is paired with the selected source. You can view details about the target in the Details pane. If there is global replication policy configured either in Bridge or in Workspaces, all data in the workspaces depot will be replicated according to its parameters.

To remove a Bridge target:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **Bridge** and then **Bridge Sources** below it. The page lists all already added sources.
3. Select the source whose target you want to remove and in the **Details** pane click the **Remove target** button and then confirm that you want to remove the target, when prompted.

Configure Data Replication Policy

To allow Bridge to automatically replicate files from the source to the target, you should configure a data replication policy. It operates using just one parameter - for how long a file should not have been modified in order Bridge to queue it for replication.

Using the Workspaces interface, you can configure a global replication policy, valid for all sources. You can also overwrite the global replication policy for any specific source and thus make it use different parameters for data replication.

To configure a Bridge global replication policy:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **Bridge**.
3. In the left pane under **Policy**, configure for how long a file on the source should not have been modified in order Bridge to replicate it on the target and then click Apply.

To overwrite the Bridge global replication policy for a source:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings** button
2. In the left pane of the Settings page, click **Bridge** and then **Bridge Sources** below it. The page lists all already added sources.
3. Select the source in the list and in the **Details** pane on the right, under **Policy** configure for how long a file should not have been modified in order Bridge to automatically replicate it, then click **Apply**.

Important: To make the source use the global replication policy, under Policy click Reset and when prompted, confirm that you want the source to use the global replication policy.

Exclude a Workspace from Automatic Bridge Operations

To prevent Bridge from automatically managing a workspace's data, you should exclude that workspace. Once a workspace is excluded, you can still manually manage its data with Bridge. To let Bridge resume automatically managing its data, simply include it again.

To exclude a workspace from automatic Bridge operations:

In the web interface, select a workspace in the list and in the workspace menu click the Exclude from replication button

Note: You can view a list of all excluded workspaces in Settings | Bridge page, under Excluded Paths.

To enable automatic Bridge operations on an excluded workspace:

Do one of the following:

1. In the web interface, select a workspace in the list and in the workspace menu ... , click the **Enable** replication button
2. In **Settings | Bridge** page, under Excluded paths, click the remove path button next to a workspace in the list.

Manually Perform Bridge Operations on a Workspace

You can manually perform Bridge operations on all data in a specific workspace, even if the workspace is excluded from automatic Bridge operations. The respective commands are available only to files/folders in the workspace to which they apply i.e. you cannot issue the “Reclaim space” command for a file, which has not been replicated yet.

To manually perform Bridge operations on data in a workspace:

1. Log in to the Workspaces web interface as an administrator
2. In the web interface, select a workspace in the list and in the workspace menu ... , do one of the following:
 - Click Replicate, to manually replicate all data in the workspace.
 - Click Reclaim space, to manually replace all replicated data in the workspace with stub files.
 - Click Retrieve data, to manually restore all stub files in the workspace from the target.
 - Click Move to archive, to manually move all replicated data in the workspace to the archival tier of the target.
 - Click Rehydrate from archive, to manually move all offline files in the workspace from the archival tier of the target to the hot/cool tier.

Tip: You can perform the operation on multiple workspaces simultaneously by selecting them in the list while holding down the Ctrl or Shift keys on your keyboard or by using the Up or Down arrows on your keyboard and selecting the users using the space bar, while holding down the Ctrl or Shift keys.

Monitoring Workspaces

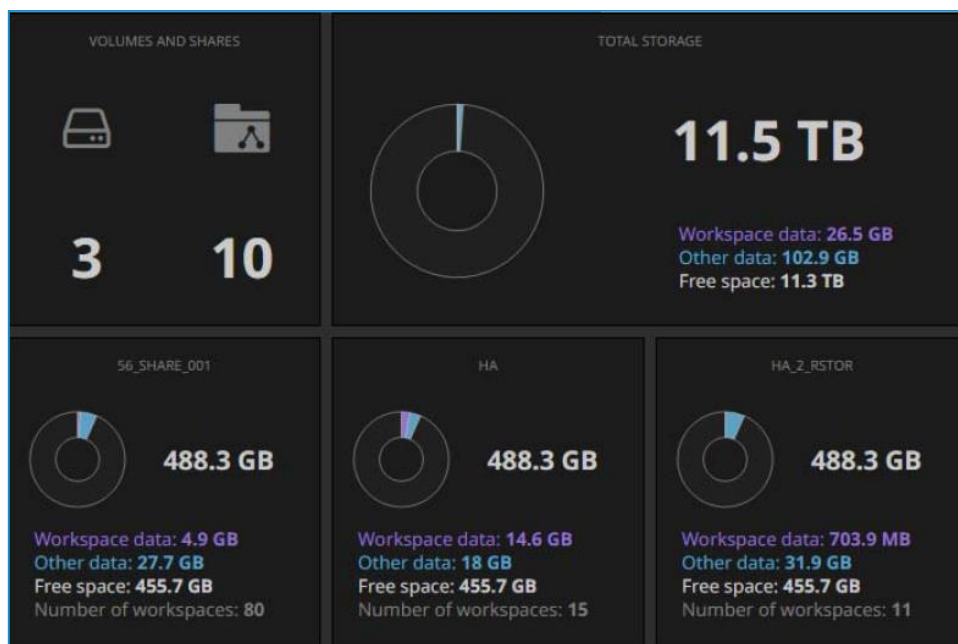
As an administrator of Workspace you can monitor statistics about each element of your Workspaces environment:

- the Workspace XE volume (s) comprising the workspaces depot and data on them
- the workspaces and data on them
- the connected client computers
- the users accessing the depot
- data managed by Bridge

You can view and download a detailed activity log, filtering it by various criteria. You can also download the list of all workspaces in the depot as a comma separated values (.csv) file

Monitoring Storage Statistics

Use the Dashboard of Workspace (Settings | Dashboard) to view the following statistics about the storage systems comprising your workspaces depot:



- The number of volumes on which Workspaces support is enabled
- workspace data, other data, free space and number of workspaces on all storage systems in the depot
- workspace data, other data, free space and number of workspaces on each storage system

Workspaces Data Statistics

You can view detailed statistics about workspaces data at different levels - the workspaces depot, an individual storage system and a particular workspace.

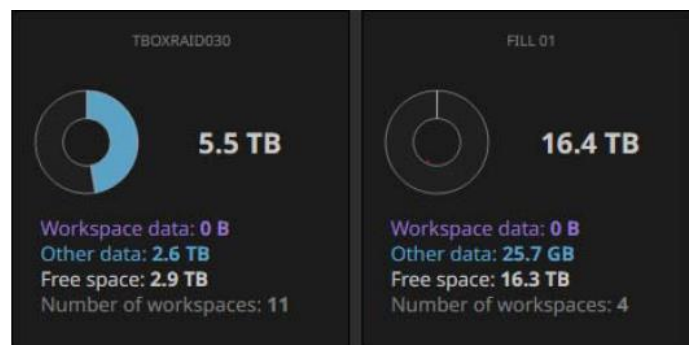
Workspaces Statistics in the Depot

Use the Workspaces Dashboard (Settings | Dashboard) to view the following statistics about workspaces in your depot:

- number, average size of a workspace, total used space on all storage systems, and number of workspaces currently mounted for viewing or editing.
- the number of newly created workspaces in the last 30 days
- a list of all workspaces currently mounted for viewing or editing.

Workspace Statistics on the Workspace XE

You can use both the Workspace Dashboard and the details pane of a selected storage system (Settings | Storage) to view statistics about the number of workspaces, the amount of workspace and other data on the storage system as well as the free space on it.



Workspace Data Statistics

You can get statistics about the size, number of files and folders as well as the number and size of specific file types (video, audio, image, document, proxy media, other) of a select workspace in the Details tab of its Inspector pane.

View Connected Client Computers

In the Clients page of the administrative interface (Settings | Clients) you can view a list of all currently connected client computers. You can sort the list of connected client computers by computer name, IP address and operating system.

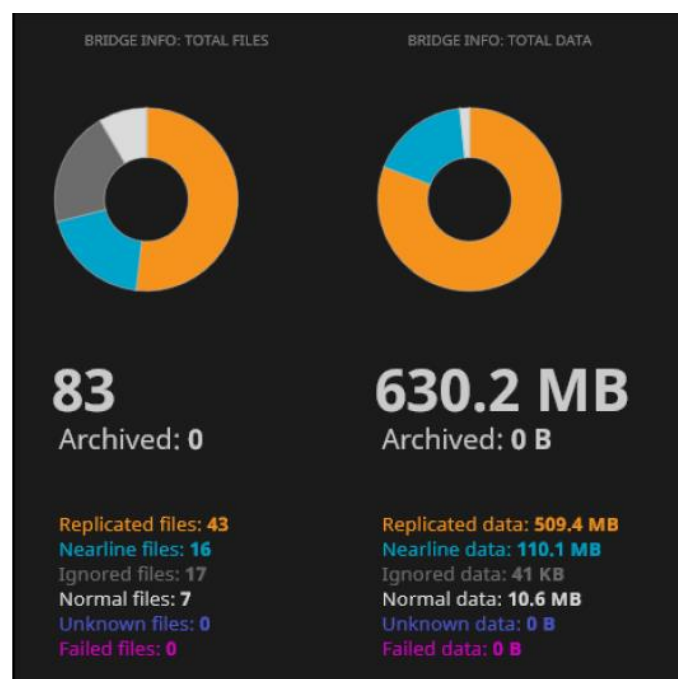
Note: Computers running the Workspaces client driver, but currently not connected to the Workspace XE are not displayed in the list.

Monitoring Bridge

To view the Bridge status of a workspace, in list view simply check the Replicated and Nearline columns, displaying what percentage of data in the workspace is replicated and what percentage of data is replaced by stub files.

You can also view Bridge statistics about data:

- in a specific workspace (in the Details tab of the Inspector pane for a selected workspace)
- on a specific volume/share (in the Workspaces Dashboard, click Bridge | Bridge Sources and select a volume/share in the list).
- on all volumes (in the Workspaces Dashboard, click Bridge)



Two pie charts display the distribution of data within the workspace volume(s) depending on its Bridge status respectively by number of files and by data size.

Monitor Bridge Operations

You can monitor the status of each Bridge operation for a workspace started manually, through the Workspaces web interface. For the purpose, click Bridge jobs in the upper right corner of the web interface.

Status	Result	Action	Details
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	Generic		
Completed	File is not suitable		
Completed	File is not suitable		
Completed	Generic		
Completed	Generic		

Workspaces displays a list of all Bridge jobs initiated since the last restart of the Workspace EX, starting from the newest. Each job represents a data lifecycle operation performed on all data in a given workspace - replicate data, reclaim space or move data to the archival tier of the target. To view the specific workspace on which a Bridge job is performed, simply select it in the list and view the path to the workspace in the right pane.

[View User Statistics](#)

In the Workspace Dashboard (Settings | Dashboard) you can view general statistics about users accessing the workspaces depot:

- the number of users and groups
- the number of newly created users/groups within the last 30 days
- the list of all users who have logged in to Workspaces within the last 30 days with information about the number of sessions per each user

Monitor Individual Users

In the Inspector pane of a selected user (Settings | User Management), you can view the following detailed information about a selected user:

- (Details tab) the number of workspaces this user is owner of and their size, and a list of workspaces currently mounted by the user.
- (Settings/Member Information tab) the user role and the groups that user is member of
- (Workspaces tab) the list of workspaces the user owns and list of workspaces shared with the user

View Workspaces Activity Log

The activity log of Workspaces gives you information about the following actions:

Workspace settings — Workspaces support enabled/disabled, permissions enabled/disabled, workspace quotas enabled/disabled.

User/group — created, deleted, changed type, time of log in and log out.

Workspaces — created, deleted, mounted, dismounted, moved.

You can also filter the information displayed in the activity log by time period, user, target (user, storage system, workspace) and type of activity. You can also download the activity log as a comma-separated values (CSV) file.

To view the Workspaces activity log:

1. Log in to the web interface with an administrative account.
2. In the upper right corner of the web interface, click **Settings**.
3. In the left pane, click **Activity Log**.
4. To filter the results, in the upper right corner of the web interface click the Filter button.
5. In the Activity Filter dialog, select the filters you want to apply and click **Save**.

Tip: To clear the filters, in the Activity Filter dialog click Clear All and then Save.

To export the activity log as a .csv file:

1. Log in to the web interface with an administrative account.
2. In the upper right corner of the web interface, click **Settings**.
3. In the left pane, click **Activity Log**.
4. (optional) Narrow down the entries in the downloaded activity log, using the **Filter** button.
5. In the upper right corner of the web interface, click the **Export** as csv button

Depending on the settings of your web browser, the .csv file either downloads automatically to your default location for downloaded files or you are prompted to select a location yourself.

Note: Data in the .csv file is arranged the same way as it appears in the web interface. To rearrange it, before downloading the .csv file sort the desired columns in ascending or descending order by clicking their headers.

Download the Workspaces List as a .csv File

To facilitate you in keeping track of your projects, Workspace allows you to download the list of all workspaces in the depot as a comma separated values (.csv) file. The file contains the following information about each workspace in the depot:

- Name
- Owner
- Size
- time when the workspace has been last accessed
- Volume on which the workspace is stored
- Description
- Tags
- size and percentage of data replicated by Bridge

To download the workspaces list as a .csv file:

1. Log in to the web interface with an administrative account.
2. In the upper right corner of the web interface click the Export as csv button.
Depending on the settings of your web browser, the .csv file either downloads automatically to your default location for downloaded files or you are prompted to select a location yourself.

Using Workspaces User and Project Management

Connecting the Workspace Client to the Workspace XE appliance

After installing the Workspaces client driver on your computer, you must connect to the IP address of the Workspace XE in order to be able to work with Workspaces application. By default, the automatic discovery of all available Workspace XE appliances (referred to “servers” in the client UI) is turned off and you have to manually connect to the Workspace XE (“server”) from the client. If the auto discovery option is turned on, the Workspaces client will automatically detect and connects you to all available Workspace XE (“servers”) on your network.

Note: When the automatic discovery option is turned on, Workspace searches for Workspaces XE on the same network using the IP address of the network settings on the client machine.

To turn the auto discovery option on/off:

1. Display the Workspace Client window:
 - (macOS) Click the Workspace menulet and then click Settings.
 - (Windows) Click the Workspaces tray application.
2. Do one of the following:
 1. Select the **Auto-discovery** check box, to allow Workspaces to automatically detect Workspace XE appliance on the network and connect your computer to them.
 2. Clear the **Auto-discovery** check box, to allow only manual connection to a Workspace XE appliance.

To manually connect to a Workspace XE appliance:

1. Display the Workspaces Client window:
 - (macOS) Click the Workspace menulet and then click Settings.
 - (Windows) Click the Workspaces tray application.
2. Click the **Add Server** button.
3. In the **Add Server** dialog, do the following:
 - In IP address, enter the **IP address** of the Workspace XE appliance, to which you want to connect.
 - (optional, if your client machine has more than one network adapter) In Network Adapter to use drop-down box, select the IP address through which to connect to the Workspace XE.
4. Click **Add**

To disconnect from a Workspace XE appliance:

1. Display the Workspaces Client window:
 - (macOS) Click the Workspace menulet and then click Settings.
 - (Windows) Click the Workspaces tray application.
2. In the Settings dialog, click the **Delete** button next to a Workspace XE appliance in the list.

Important: To disconnect from a Workspace XE appliance you must first dismount all mounted workspaces.

Note: The delete button is greyed out if the automatic discovery option is turned on

Access the Web Interface of Workspaces

To access the web interface, you have to log in to Workspaces with an account that is either a member of the “Workspaces Users” or “Workspaces Admins” accounts, created by an administrator of Workspaces (when Workspaces is deployed in workgroup environment – the default shipping configuration). Or “Workspaces Users” or “Workspaces Admins” groups or any of their subgroups on the domain controller (when Workspaces is deployed in Active Directory domain). See “Manage Workspaces User Accounts and Groups”

Note: In an active directory configuration (not the default configuration), if the “Workspaces Users” or “Workspaces Admins” groups do not exist on the domain controller, you have to manually create them. If you want to use the accounts in a different group on the domain controller, contact Symply support team for assistance.

Until you manually log out, you remain logged in to Workspaces, even if you close your web browser (unless you are using private browsing). If you log in to Workspace in a web browser, you remain logged in to Workspaces in each new tab/window of the same web browser you open.

Login status verification is not carried out across web browsers i.e. if you log in to Workspaces in one web browser, should you open the web interface in another web browser, you will have to log in anew.

To access the web interface from a macOS or Windows Workspaces client:

1. Right-click the Workspaces tray menulet/application and select Workspaces in the menu, then click the **IP address** of the Workspace XE appliance, whose web interface you want to access.
2. In the home page of the web interface, enter your user name and password in the respective fields and then **click**.

Note: If you are logging in to the web interface as a domain user, enter the user name without its domain i.e. “user” instead of “user@domain.com” or “domain\user”.

To log out of Workspaces from a client:

1. In the upper right corner of the web interface, click the User icon and then in the menu click Log out.

Important: After you log out Workspaces, all workspaces volumes currently mounted for viewing or editing are automatically unmounted and all unsaved changes are lost.

Changing your password

Beside Workspaces administrators, each Workspace user can change the password of his/her Workspaces account.

To change the password of your Workspaces account:

1. Log in to the Workspaces web interface.
2. In the upper right corner of the web interface, click the **User icon** and then in the menu click **Change password**.
3. Enter the new password in the corresponding fields.
4. click **Save**.

Using the Workspaces Web Interface

The web interface of Workspace is the place for actually working with workspaces. By clicking the respective icon in the upper right corner of the web interface you can switch between list view or grid view.

List View

Auto	Action	Starred	Name	State	Volume	Size	Owner	Replicated	Reuse	Last Access
			...	Available	56_share_001	6.2 KB	goudman	N/A	N/A	5-Apr-2022 11:42:17
			...	Available	56_2_80708	36 B	goudman	N/A	N/A	1-Sep-2022 12:41:03
			Free	Available	56_share_001	209.2 MB	css	N/A	N/A	10-Jun-2022 12:28:14
			88000	Available	56_share_001	185 B	memm	N/A	N/A	19-Sep-2022 18:06...
			88000	Available	56_share_001	11.4 KB	css	N/A	N/A	10-Jun-2022 12:28:56
			88000	Available	56_2_80708	36 B	goudman	N/A	N/A	8-Apr-2022 12:06:04
			88000	Available	56	12.2 MB	css	N/A	N/A	10-Jun-2022 11:27:25
			88000	Available	56_share_001	36 B	memm	N/A	N/A	20-Sep-2022 09:26...
			88000	Available	56_2	761 B	56	N/A	N/A	20-Sep-2022 09:27...
			88000	Available	56	0 B	N/A	N/A	N/A	8-Dec-2022 17:02:22
			88000	Available	56_2_80708	0 B	N/A	N/A	N/A	16-Dec-2022 12:57...
			88000	Available	56_share_001	0 B	N/A	N/A	N/A	23-Jun-2022 14:50:13
			88000	Available	56	0 B	N/A	N/A	N/A	16-Dec-2022 12:57...
			88000	Available	56_2_80708	0 B	N/A	N/A	N/A	16-Dec-2022 12:57...
			88000	Available	56_share_001	0 B	N/A	N/A	N/A	16-Dec-2022 12:57...
			88000	Available	56_2	393 B	css	N/A	N/A	20-Sep-2022 11:06...
			88000	Available	56_share_001	0 B	goudman	N/A	N/A	31-Aug-2022 10:57...
			88000	Available	56_2	0 B	memm	N/A	N/A	3-Oct-2022 12:54:35

By default, in list view each workspace is displayed with its name, state (Available or In use), owner, size. Additionally, the buttons in the first three columns of the list allow you to directly perform actions on a workspace, without having to open its page:

- pin or unpin a mounted workspace (see “Pin a Workspace”)
- mount the workspace with Read Only permissions (see “Mount a Workspace for Viewing”)
- mount the workspace for editing (see “Mount a Workspace for Editing”)
- mount the workspace exclusively i.e. not letting any other users mount it on their computer (see “Mount a Workspace for Editing”)
- unmount the workspace from your computer (see “Close a Workspace”)
- star a workspace or remove its star (see “Star a Workspace”)

Note: The Auto column displays the pin button only for workspaces mounted on your computer and if the automount option has not been disabled by a Workspaces administrator.

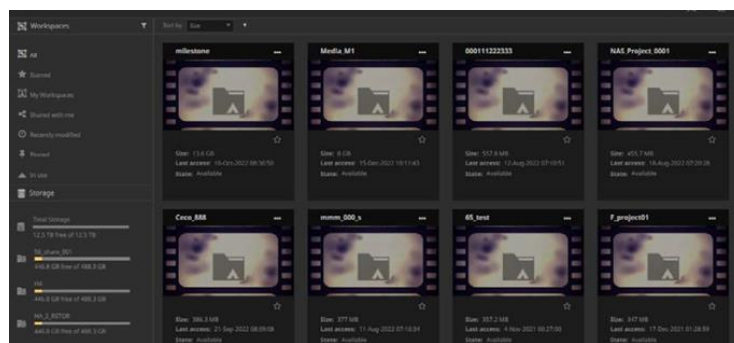
Note: The Action column displays the Mount Exclusively button only if exclusive mounts have not been disabled by a Workspace administrator.

You can sort the workspaces list in ascending/descending order by clicking the header of the respective column. You can also hide/unhide a column, following these steps:

1. Click the **Cogwheel** in the upper right corner of the column's header.
2. In the Show/Hide Columns dialog, do one of the following:
 - Select the check box of a column, to display that column in the workspaces list and then click Submit.
 - Clear the check box of a column, to hide that column in the workspaces list and then click Submit.

In list view, you can select multiple workspaces simultaneously and perform an applicable operation on all of them (like export or delete the selected workspaces, for example). For the purpose, select them with your mouse, while holding down either the Ctrl or the Shift button. You can also select multiple workspaces in the list using just your keyboard by holding down either the Ctrl or the Shift button, while navigating within the list with the Up or Down arrows and selecting the workspaces by pressing the space bar.

Grid View



In grid view each workspace is displayed with a thumbnail displaying the workspace name, size, last access date and state. In addition, the thumbnail can display an image, selected by you and allowing to more easily discern between workspaces. For the purpose, you need to create a file in .jpg format named “workspace_thumbnail.jpg” with size up to 250 KB in the root of the workspace folder. If such file is not detected, Workspaces displays a default image in the thumbnail of the workspace.

You can sort the list of workspaces' thumbnails by star, name, owner, state, size, last access date, name of the volume on which the workspace is stored, replicated or nearline status. For the purpose, select the desired sorting criteria in the drop-down box above the list and sort the list in ascending or descending order, using the arrow beside it.

Filtering Displayed Workspaces

By default, in both list and grid view the interface lists all workspaces accessible to your account. By selecting the respective option in the left sidebar, you can filter the list of displayed workspaces:

All workspaces — lists all workspaces available for your account.

Starred — lists all workspaces starred by you or another user, which are available for your account.

My workspaces — lists just the workspaces you have created.

Shared with me — lists the workspaces shared with you for editing or previewing.

Recently modified — lists all recently modified workspaces to which you have access.

Pinned — lists the workspaces you have selected to remain mounted on your computer as long as you are logged on to Workspaces.

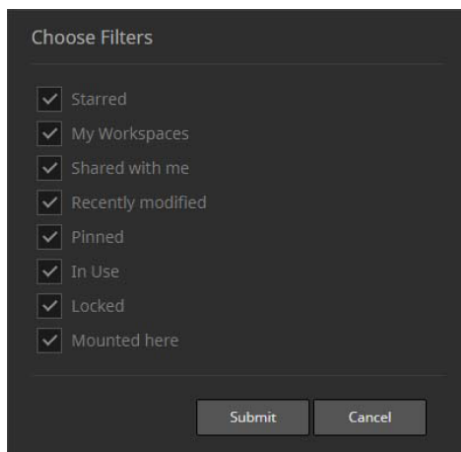
In use — lists all workspaces that are currently mounted on a client computer.

Locked — lists all your workspaces that are currently locked. If you have logged on to the Workspaces web interface as an administrator, the view lists all locked workspaces in the depot.

Mounted here — lists all workspaces mounted on your computer only.

To display all available filters, you may have to use the sidebar scroll. You can adjust the filters displayed in the left pane, following these steps:

1. In the Workspaces sidebar, click the filters button.
2. In the Choose Filters dialog, do one of the following:



- To display a filter in the sidebar, select its check box and click Submit.
- To hide a filter in the sidebar, clear its check box and click Submit.

Single Workspace View

Workspaces allows you to preview a workspace even if you are accessing the user interface from a non-Workspaces client computer, as long as your account has permissions for the workspace.

Workspaces offers you two options for previewing a workspace:

Inspector pane — gives you general information about the workspace such as name, type, owner, size, number of files and folders, preferred mount point (if any), description, tags.

Workspace page — all details from the Inspector pane, including the hierarchical structure of the workspace and filters for browsing just media, objects or other files.







To preview workspace information in the Inspector panel:

1. In the web interface, select a workspace in the list and click the Inspector button in the upper right corner of the web interface.
2. In the Inspector panel, switch between Details, Sharing, Comments and Activity, by clicking the respective tab.

To preview a workspace's contents:

1. In the web interface, double-click a workspace in the list to open its page.
2. Browse the workspace structure and contents, by the double-clicking a sub-folder or by filtering the contents of the workspace to view just media files or object files.

When previewing a video file, you can use the following video player controls:

Player control	Keyboard shortcut	Action
	space bar	play video track
	space bar	pause playback
	L	increase playback speed (press K to pause video playback and reset the speed to normal)
	J	decrease playback speed (press K to pause video playback and reset the speed to normal)
	right arrow	plays the video forward one frame at a time
	left arrow	plays the video backwards one frame at a time

Workspaces General Information

In the left pane at the bottom of the main interface, you can view information about the file systems in the depot, to which your computer is connected. The used space bar colour designates how full is the respective file system.

Below the Workspaces logo, you can view the version of software. The top band of the interface also allows you to search the depot (see “Searching The Workspaces depot”) and displays controls for workspace management, depending on the current selection (see “Working with Workspaces”).

Searching The Workspaces Depot

You can find workspaces and data in them, using the Workspaces search engine. Workspaces displays results based on workspace name, description, tags and star colour, but can also search within the workspaces contents - displaying as results metadata generated by the parsers (file name, format, video/audio properties, etc.). Workspace cannot display results based on workspace's sub-folder name.

Note: The Workspaces application parses each workspace, which has been mounted for editing, only when it is dismounted. You can also force the parsing of a workspace by rescanning it.

When initiating a search as an administrator, Workspaces displays results within all workspaces in the depot. When the search is initiated by a user, Workspaces searches only in the workspaces that user has access to.

All search results are sorted in alphabetical order. You can filter the results by choosing to display just media results, just objects, just miscellaneous files or just tags by selecting the respective search filter in the left pane.

The search engine of Workspaces application also utilizes "find as you type" feature, which displays matching results with each keystroke, but the results are limited only to workspace metadata such as name, description, owner, tags, etc. Also, search results displayed before you press Enter, cannot be filtered by media, objects, files and tags.

You can use wildcards to expand your search:

- `'_'` for a random single character (example: `'s_mple'` finds `'sample'` and `'simple'`, etc.)
- `'%'` for a random string of characters (example: `'l%t'` finds `'list'`, `'lot'`, `'loft'`, etc.)

Tip: To use the above symbols not as wildcards, include them in your search in square brackets (example: `'draft[_]September'` finds `'draft_September'`).

You can use a prefix in your query to narrow your search to:

ws: —workspaces only (example: `ws:dog` will display only workspaces containing "dog").

md: — media only (example: `md:cat` will display only media results containing "cat").

obj: — objects only (example: `obj:mouse` will display only objects containing "mouse").

fl: —files only (example: `fl:cockroach` will display only files containing "cockroach").

To clear the search results and return to the workspaces list, either click the Close button in the search box or click the Workspaces logo.

Working with Workspaces User and Project Management

On a Workspace client computer, you can work with workspaces stored in the depot in the following ways:

- Create a new empty workspace.
- Create a new workspace from template.
- Mount a workspace with Read Only permissions to read and copy data from it
- Mount a workspace with Read & Write permissions – depending on the type of the workspace, other computers may also be able to mount it for editing (Avid Bin Locking or Multi-user Write types) or just for viewing.
- Mount a workspace for editing with Exclusive permissions i.e. not letting any other computer mount it for editing or viewing until you unmount it regardless of the type of the workspace
- Pin a workspace.
- Lock a workspace, allowing only Read Only access to it even to its owner.
- Edit workspace settings such as name, description, tags, type, quota, volume/share it is stored on and allow using it as template for other workspaces.
- Close a workspace.
- Delete a workspace.
- Add comments to a workspace.

Workspaces has an intuitive user interface that displays just the options that are currently available for you for each workspace – these depend on the state of the workspace (In Use or Available) and on the permissions your account has for the specific workspace. The interface updates the information about workspaces dynamically and there's no need to refresh your browser in order to view most current information.

Create a New Empty Workspace

When you select to create a new empty workspace besides specifying the name and type of the workspace, you can also add description and tags to facilitate finding the workspace, and specify preferred mount point of the new workspace on Windows computers.

Note: Only Workspace administrators can create workspaces when workspace quota setting is enabled in Workspaces.

To create a new empty workspace:

1. In the web interface, make sure no workspace is selected and click the **Create** button in the upper right corner of the web interface.
2. Enter the name of the new workspace.
3. Make sure that the **"From Template"** check box is not selected.
4. (optional) Provide a brief description of the workspace to help you and other users discern the workspace in the depot.

Note: A tag can consist of maximum 256 characters including spaces. To finish adding a tag, simply press Enter. To edit a tag, double click it and when finished, press Enter. To delete a tag, click the Delete button in the tag itself.

5. (optional) Add tags to the workspace, to facilitate searching the database.
6. If workspace quotas are enabled, enter the quota of the new workspace in GB.

Note: This field is available only if workspace quotas are enabled and if a Workspaces administrator is creating a new workspace

7. In the Write Type drop-down box, select one of the following:
 - **Single-user Write** – the workspace can be mounted with Read & Write permissions on only one computer at a time.
 - **Avid Bin Locking** – The Workspaces application emulates Avid FS for the workspace and allows mounting the workspace with Read & Write permissions on multiple computers simultaneously, letting Avid restrict accesses to the bins that are currently in use.
 - **Multi-user Write** – there is no emulation of the file system, but the Workspaces application allows mounting the workspace with Read & Write permissions on multiple computers simultaneously.

Warning: Unless the applications you use allow accessing the same workspace with Read & Write permissions simultaneously, setting the workspace type to Multi-user Write can lead to corruption of data in the workspace, stored on a Multi-user write workspace.

8. In **Mount Point**, select a preferred drive letter, which to be used on each Windows computer when mounting the workspace.
9. In the **Volume drop-down box**, select the volume on which to create (HDD, U.3 or E1.S) the workspace or select **Auto** to create the workspace on the volume with most free space.
10. (optional, if workspace quotas are enabled) In Quota, enter the workspace quota in GB)

Note: This field is available only if workspace quotas are enabled and if a Workspaces administrator is creating a new workspace.

11. Click **Submit**.

A folder with the name of the workspace is created in the depot. If permissions are disabled, the newly created workspace is accessible for work to any user. If permissions are enabled, until you set permissions to the newly created workspace, only you as owner can access it. For details about setting permissions to a workspace, refer to “Set Workspace Permissions.”

Create a New Workspace from a Template

If you choose to create a new workspace based on template, your new workspace will be the same type as the template workspace and will inherit its folder structure. You can also select to copy the contents of the template workspace or inherit its permissions, or both. The description, tags and preferred mount point setting are optional and should be specified manually for each new workspace. The Workspaces application allows you to set any existing workspace as a template for new workspaces. For more details about setting a workspace as template, see “Set a Workspace as Template”

Important: Until the creation of the new workspace is fully finished, the state of both the new workspace and the template workspace remains In Use for other computers.

Note: Only Workspace administrators can create workspaces on volumes when workspace quota setting is enabled in the Workspaces application.

To create a new workspace from template:

1. In the web interface, make sure no workspace is selected and click the **Create** button in the upper right corner of the web interface.
2. In the New Workspace dialog, select the **From Template** check box.
3. Enter a name of the new workspace.
4. In the list of existing template workspaces, select the workspace that you want to use as a template for the new workspace.

Important: If a template workspace is currently mounted with Exclusive rights, you cannot use it as a template.

5. Select “**Copy template content**”, if you also want to copy the contents of the template to the new workspace.

Note: Copying the contents of the template workspace can take significant time. Until the whole contents is copied to the new workspace, both the template and the new workspace are locked.

6. Select “**Copy template permissions**”, if you want the new workspace to inherit the permissions of the template workspace.

Note: Copying permissions from a template workspace includes the owner of the workspace.

7. (optional) Provide a brief description of the workspace to help you and other users discern the workspace in the depot.
8. (optional) Add tags to the workspace.

Note: A tag can consist of maximum 256 characters including spaces. To finish adding a tag, simply press Enter. To edit a tag, double click it and when finished, press Enter. To delete a tag, click the Delete button in the tag itself.

9. Specify a preferred **Mount point**, which to be used on Windows computers for mounting the workspace.

10. In the **Volume** drop-down box, select the volume (HDD, U.3 or E1.S) on which to create the workspace or select Auto to create the workspace on the volume with most free space.
11. (optional, if workspace quotas are enabled) In Quota, enter the workspace quota in GB.

Note: This field is available only if workspace quotas are enabled and if a Workspaces administrator is creating a new workspace.

Important: If you are also copying the contents of the template workspace, make sure that the quota you assign to the new workspace is not less than the contents of the template workspace as not all content will be copied.

12. Click **Submit**

A folder with the name of the workspace is created in the depot. If permissions are disabled, the newly created workspace is accessible for work to any user. If permissions are enabled, until you set permissions to the newly created workspace, only you as owner can access it. For details about setting permissions to a workspace, refer to “Set Workspace Permissions.”

[Mount a Workspace for Viewing Only \(Read Only permissions\)](#)

Once you mount a workspace for viewing (with Read Only permissions), it is mounted on your computer as a local drive, but you cannot introduce any changes to it – you can just copy data from it to another location (a workspace mounted for editing, for example).

A workspace can be mounted for viewing on multiple computers as long as it is not mounted Exclusively on another machine.

Tip: To view who has mounted the workspace and with what permissions, click the In Use link in the workspace listing.

Note: that if changes are introduced in the workspace from the computer that has mounted it for editing, all computers that are just viewing the workspace detect these changes only after re-mounting it.

Important: (Avid only) You can open an Avid project, stored in a Workspaces only if you have it mounted for editing. When the workspace is mounted with Read Only access, you will be able to open the Avid project’s Bins only.

To mount a workspace for viewing (Read Only permissions):

In the web interface, click the Read button in the listing of a workspace.

The workspace mounts as a local drive on your computer. If no preferred mount point is specified (for Windows OS), the workspace is mounted in the default mount point for the respective platform:

- (macOS) in the /Volumes directory.
- (Windows) using the first available drive letter.

Mount a Workspace for Editing (Exclusive, Single-user Write, Multi-user Write or Avid Bin Locking)

Before beginning work with your desired application on a workspace that exists in the depot, you must first mount it as local drive on your computer. Workspaces provides you with several options for mounting a workspaces for editing.

When the workspace type is set to “**Single-user Write**” only one computer can mount it with Read & Write permissions at a time and the workspace state must be “**Available**”.

When the workspace type is “**Avid Bin Locking**” or “**Multi-user Write**” multiple computers can mount it for editing even if the workspace state is “**In Use**”.

Note: that in the case of “Avid Bin Locking” or “Multi-user Write,” preventing data corruption is up to the application you use for access to the workspace’s data.

Regardless of the type of the workspace, you can mount it Exclusively (mount it for editing with Exclusive rights), which means that no other computer can mount it neither for editing, nor for viewing until you close it on your computer.

Additionally, if a workspace is locked, it cannot be mounted for editing on any computer until its owner or an administrator unlocks it.

To mount a workspace for editing:

In the web interface, click the **Write** button in the listing of a workspace.

The workspace mounts as a local drive on your computer with the workspaces client driver installed. If no preferred mount point is specified, the workspace is mounted in the default mount point for the respective platform:

- (macOS) in the /Volumes directory.
- (Windows) using the first available drive letter.

To mount a workspace Exclusively:

In the web interface, click the **Exclusive** button in the listing of a workspace.

The workspace mounts as a local drive on your computer. If no preferred mount point is specified, the workspace is mounted in the default mount point for the respective platform:

- (macOS) in the /Volumes directory.
- (Windows) using the first available drive letter.

Note: To allow access to the workspace again, you must close it

Locking a Workspace

When you don't want anyone to introduce any further changes to a workspace, you can lock it. By locking a workspace you provide only Read Only access to it, until it is again unlocked. Locking a workspace can be useful when you want to set it as template.

Important: Only the owner of a workspace or a Workspaces administrator can lock/unlock a workspace. You cannot lock/unlock a workspace if its state is "**In Use**".

You can view a list of all workspaces locked by you, by applying the lock filter. For more information, refer to "The Web Interface"

To lock/unlock a workspace:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector** button in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the Details tab of the Workspace Settings pane, do the following:
 - To lock the workspace, select the **Locked check box** and click **Submit**.
 - To unlock the workspace, clear the **Locked check box** and click **Submit**.

Pinning a Workspace

By default, each time you want to work with a workspace, you must access the web interface of Workspace and manually mount it. To facilitate your workflow, The Workspaces applications allows you to pin a selected workspace, which means that each time you log in to the web interface, the Workspace application attempts to mount it with the same permissions (Read, Write or Exclusive) you have mounted it as long as the workspace is not in use on another computer. A workspace can be pinned by two or more users at the same time. In this case Workspaces mounts it for the user that logs on the web interface first.

You can unpin a workspace at any time. Also, a workspace is no longer pinned to your account, if you explicitly dismount it by closing it in the web interface or if an administrator or the owner of the workspace force closes it from your computer.

To pin/unpin a workspace:

1. In the web interface, mount a workspace for viewing, writing, or exclusively.
2. In the workspace listing, click the pin icon next to the workspace name to change the state of the workspace to either pinned or unpinned.

Tip: You can keep track of all pinned workspaces for your account, by clicking the Pinned filter in the left pane.

Closing a Workspace

You can close a workspace you have mounted for editing or just for viewing. When you close a workspace in the Workspaces interface, you simply unmount the workspace drive from your computer. That is why, before closing a workspace, which you have edited, make sure that you have closed it in the editing application first, as any unsaved changes will be lost once you unmount the workspace from your computer.

Note: You can automatically unmount all workspaces mounted on your computer by logging out of the Workspaces application.

You cannot close a workspace mounted on another computer. If a computer is holding a workspace open, an administrator or the owner of the workspace can force close it. Force closing a workspace unmounts the workspace from the computer and any unsaved changes in it are lost.

To close a mounted workspace:

In the web interface, click the Close button () in the listing of a mounted workspace. The workspace drive is unmounted from your computer.

To force unmount a workspace mounted on another computer:

1. In the web interface, click the In Use button in the listing of a mounted workspace.
2. In the Force Unmount dialog, click the Force Unmount button () next to a user and then confirm that you want to force unmount the workspace from that user's computer.

Important: Force unmounting a workspace unmounts the workspace from the computer and any unsaved changes are lost.

Important: Only the owner of a workspace or an administrator can force close a workspace, mounted on another computer.

Deleting a Workspace

The owner of a workspace or an administrator of Workspaces can delete a workspace as long as it is not mounted on any computer (the workspace state is Available) and it is not locked. Once you delete a workspace in the Workspaces application, the hidden folder and all of its contents are deleted from the depot on the volume and cannot be restored.

To delete a workspace:

1. In the web interface, select a workspace in the list and in the workspace menu, click **Delete workspace ()**
2. **Confirm** that you want to delete the workspace.

Managing Workspaces Comments

Comments are designed to facilitate the communication between team members when working on the same workspace. Unlike the workspace description and tags, comments are not parsed by the Workspaces search engine. Each user can add, edit or delete their own or other users' comments on a workspace, even if it is currently mounted on another computer. A comment can consist of up to 1000 characters with spaces included.

To manage workspace comments:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector** button in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the **Comments** tab of the Workspace Settings pane, do one of the following:
 - To add a new comment, click the **Add comment button**, enter the comment in the comment box and click **Save**.
 - To edit a comment, click the **Edit comment button** next to an existing comment, edit it in the comment box and click **Save**.
 - To delete a comment, click the **Remove comment button** next to an existing comment and when prompted, confirm that you want to delete the comment, then click **Save**.

Editing a Workspace Settings

The name of a workspace is used as a label of the drive that mounts on your computer. Only the owner of a workspace or an administrator can edit its name.

Note: To edit the name of a workspace, its state must be Available i.e. it must not be mounted on any other computer.

To rename a workspace:

1. In the web interface, select a workspace in the list and in the workspace menu (), click the **Rename button ()**.
2. In the **Rename Workspace** dialog, enter a new name and click **Submit**.

Editing a Workspace Description

The workspace description facilitates you in discerning one workspace from another. The description is also scanned by the Workspaces's search engine when displaying search results. You can change the description of a workspace at any time. To edit the description of a workspace, its state must be Available i.e. it must not be mounted on any other computer.

Note: Only the owner of a workspace, a Workspaces administrator and users with Edit permissions can change the description of a workspace.

To add/edit workspace description:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector** button in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the **Details tab** of the Workspace **Settings pane**, add/edit the workspace description in the respective field.
3. click **Save**.

Managing Tags

The tags associated with a workspace facilitate you when using the Workspaces's search engine. A tag can consist of more than one word and can contain spaces. You can add tags both to a workspace and to its contents (media file, other file or object). You can also edit an existing tag or delete it at any time. You can manage the tags associated with a workspace even if it's currently mounted on another computer for editing.

Note: Workspace stars also appear as tags in the workspace metadata. For information about starring a workspace, refer to "Star a Workspace"

To manage the tags of a workspace:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector** button in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the Details tab of the Workspace Settings pane, do the following:
 - To add a tag to the workspace, in the **Tags field**, type the tag and press **Enter** when finished.
 - To edit a tag, in the **Tags field**, double click an existing tag, edit it and when finished press **Enter**.
 - To delete a tag, in the **Tags field**, click the **Delete** button next to the tag.

Tip: To delete all tags associated with the workspace, below the Tags field, click the Delete button. This doesn't delete tags associated with the workspace contents (media file, another file or an object).

To manage the tags associated with a workspace's contents:

1. In the web interface, double-click a workspace in the list to open its page.
2. In the left pane select the type of content whose tags you want to manage – **media**, **objects**, or **miscellaneous files**.
3. Select the item in the list and in the **Details pane** do the following:
 - To add a tag to the item, in the Tags field, type the tag and press Enter when finished.
 - To edit a tag, in the Tags field, double click an existing tag, edit it and when finished press Enter.
 - To delete a tag, in the Tags field, click the Delete button () next to the tag you want to delete.

Tip: To delete all tags associated with the item, below the Tags field, click the Delete button. This deletes just the tags associated with the currently selected item.

Starring a Workspace

Starring a workspace is another method for discerning between workspaces. The Workspaces application allows you to “star” a workspace with one or more of the three available star colours - red, yellow, green.

A workspace can be starred by two or more users, to which it is accessible, each using different colours. In this case the workspace is displayed with a multi-coloured star in the list. You can sort the workspaces list by their star colour. Additionally, star colours appear as tags in the workspace metadata, using the following format “[colour]_star”. Thus, you can search for a given star colour and filter the results, limiting them to tags only.

To Star a workspace:

1. In the workspaces list, click the **Star icon** next to a workspace.
2. In the Stars pop-up, click the star colour, which you want to assign to the workspace.

To remove the Star from a workspace:

1. To delete just a selected star colour of a workspace, click the **Star icon** next to a workspace listing and then click the star of the colour you want to remove.
2. To leave a workspace without any stars, click the star icon next to a workspace listing and in the Stars pop-up click the **Delete button**.

Note: Alternatively, you can delete one or all star colour tags in the Details tab of a workspace Inspector panel.

Editing the Workspace Type

You can change the type of a workspace at any time. Keep in mind that if the workspace already contains data, changing its type may obstruct its usage and can even lead to data corruption. For example, if you change the type of a workspace from Avid Bin Locking to Multi-user Write, you will remove the Avid FS emulation and Avid will no longer supervise which bins are currently available for use, etc. To edit the type of a workspace, its state must be Available i.e. it must not be mounted on any other computer.

Note: Only the owner of a workspace, a Workspaces administrator and users with Edit permissions can change the type of a workspace.

To edit the type of a workspace:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector button** in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the Workspace Settings pane, go to the **Details tab**.
3. In the Type drop-down box, select one of the following:
 - **Single-user Write** – no parsers for detecting the workspace type are applied and the workspace can be mounted with Read & Write permissions on only one computer at a time.
 - **Avid Bin Locking** – The Workspaces application emulates Avid FS for the workspace and allows mounting the workspace with Read & Write permissions on multiple computers simultaneously, letting Avid restrict accesses to project bins that are currently in use.
 - **Multi-user Write** – there is no emulation of the file system, but Workspaces allows mounting the workspace with Read & Write permissions on multiple computers simultaneously.
4. Click **Save**

Warning: Unless the applications you use allow accessing the same project with Read & Write permissions simultaneously, setting the workspace type to Multi-user Write can lead to corruption of data in the project.

Setting a Workspace as Template

To facilitate you in creating new workspaces, the Workspaces application allows you to set any existing workspace as template for future workspaces. When you create a new workspace from a template, you inherit the type and the folder structure of the template. Additionally, you can also select to copy the contents of the template workspace or inherit its permissions, or both. To set a workspace as template or remove it from the list of templates, its state must be Available i.e. it must not be mounted on any other computer.

Note: Only the owner of a workspace, a Workspaces administrator and users with Edit permissions can set the workspaces template or remove it from the list of templates.

To set a workspace as template:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector button** in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the Workspace Settings pane, go to the **Details tab** and do one of the following:
 1. Select the **Template check box**, to allow using the workspace and its contents as a template
 2. Clear the Template check box, to remove the workspace from the list of templates.
3. Click **Save**

Setting Workspace Permissions

Unless Workspaces is deployed without security, the access to each workspace is subject to authentication. You can authenticate yourself using the account you log in to Workspaces user interface with (an internal Workspaces account – Default Configuration, or a domain account).

Until permissions of the workspace are set only its owner can mount it for viewing or editing. The owner of a workspace or a Workspaces administrator can specify permissions defining who can access the workspace and with what rights:

Read — the user can mount the workspace with Read Only permissions only.

Write — the user can mount the workspace with Read Only, Read & Write and Exclusive permissions, but cannot delete the workspace.

Owner — the user can mount the workspace with Read Only, Read & Write and Exclusive permissions, and can manage any of its settings.

None — the user does not have access to the workspace.

Note: Only an administrator can change the owner of a workspace. Once a new owner is assigned, the previous one automatically has no permissions for the workspace.

You can assign any of the above permissions to both individual users and user groups.

As you can set permissions both for a user and or for a group of users. The Workspaces application performs the following check to decide which permissions to apply for the user:

- the permissions set for the user precede the permissions set for the group the user is part of;
- if you specify permissions for two or more user groups, of which a user is a member, but do not set the individual permissions of that user, the Workspaces application uses the more restrictive permissions set for the group i.e. if one group has Write permissions and the other has Read permissions, a member of both groups has Read permissions only;
- if no permissions are set specifically for a user, the Workspaces application applies the permissions set for the group this user is member of.

Each time you switch the environment in which Workspaces operates from workgroup (default) to domain or vice versa, an administrator of the Workspaces applications has to reset the permissions of each workspace manually to allow users to access it.

To set workspace permissions:

1. In the web interface, select one or more workspaces in the list and click the **Share button** in the upper right corner of the web interface.
2. In the **Share dialog**, select the respective permission in the drop-down box next to a user/group.
3. Click **Save**. The new permissions are applied immediately.

Important: To change the permissions of a workspace, its state must be Available. While setting the permissions, the workspace state is In Use and no computer can access it until you exit the Permissions interface.

Tip: Use the Search box to more easily find the user or group, whose permissions you want to change.

Alternatively, a Workspaces administrator can change the permissions of a user or group to any workspace in the depot, which is useful when you want to share existing workspaces with a newly created user or group of users.

To change the permissions of a user/group for a workspace:

1. Log in to the web interface with an administrative account and then in the upper right corner click the **Settings button**.
2. In the left pane of the Settings page, click **User management**.
3. Select a user or group in the list and then click the **Inspector button**. The Workspaces tab lists all workspaces the selected user or group has other than “none” access to.
4. Do one of the following:
 - To change the permissions to an already accessible workspace, next to the workspace, select the new permission in the **Permissions drop-down** box and then click Save.
 - To share a new workspace with the selected user/group, click “**Share new**”, then in the Share Workspace dialog, browse to the desired workspace and in the Permissions drop-down box, select the permissions you want to set and click Save.

Important: If you choose to make the selected user/group owner of a workspace, its previous owner automatically gains no access to the workspace.

Set Preferred Mount Point of a workspace (Windows only)

When a client computer mounts a workspace for editing or viewing, the workspace is mounted on the computer as a local drive, using the following default mount point depending on the client computer operating system:

- macOS - /Volumes directory.
- Windows – the first available drive letter.

When creating a new workspace, you can specify a preferred drive letter to be used on all Windows client computers that mount the workspace. If the drive letter is already taken, the default mount point is used.

You can set or change the preferred mount point of a workspace at any time as long as the workspace state is Available i.e. it must not be mounted on any other computer.

Note: Only the owner of a workspace, a Workspaces administrator and users with Edit permissions can change its preferred mount point.

To set/change the preferred drive letter of a workspace:

1. In the Workspaces web interface, do one of the following:
 - select a workspace in the list and click the **Inspector button** in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the Workspace Settings pane, go to the **Details tab**.
3. Select a drive letter in the **Preferred letter drop-down box**.
4. Click **Save**

Moving a Workspace Between Volumes

When Workspaces support is enabled on the HDD, U.3 NVMe, and E1.S NVMe volume(s), you can select on which volume to create each new workspace. Similarly, after a workspace is created in the depot, you can move it between the volumes.

Only the owner of a workspace or an administrator of the Workspaces application can move a workspace, if it is not mounted on any computer (its state must be Available) and it is not locked.

To move a workspace between volumes:

1. In the web interface, select a workspace in the list and in the workspace menu (...), click the **Move Workspace button**.
2. In the **Move Workspace** dialog, select the volume on which to move the workspace in the **Target volume drop-down box**.
3. click **Submit**.

Changing the Workspace Quota Capacity

You can change the quota of a workspace after it has been created. You should make sure not to set a quota that is smaller than the current size of the workspace as this may prevent you and other users from mounting it.

Note: Only Workspace administrators can assign/change the workspace quota.

To change the quota of a workspace:

1. In the web interface, do one of the following:
 - select a workspace in the list and click the **Inspector button** in the upper right corner of the web interface.
 - double-click a workspace in the list to open its page.
2. In the Workspace Settings pane, go to the **Details tab**.
3. In **Quota**, enter the quota (in GBs) of the workspace
4. click **Save**.

Tip: To remove the quota of a workspace, simply leave the quota field empty.

Rescanning a Workspace

By default, each time a workspace is dismounted from a client computer, the Workspaces parsers scan it in order to update information about files in the workspace, such as video codecs, frame rate, audio sample rate, application used, workspace structure, etc.

Additionally, on dismount the workspace database is updated with information about the workspace size, number of files, user accounts associated with it. You can force the parsing of a workspace without having to mount and dismount it, and thus update metadata information about it in the Workspaces application database.

You can also rescan a workspace in order to force the generation of proxy media in it. You can do it only if the workspace does not contain any proxy media generated already. If it does, you should first clear its proxies and only after that rescan it.

Note: You can rescan a workspace, only if its state is Available i.e. is not currently mounted on any computer.

To rescan a workspace:

1. In the web interface, select a workspace in the list and click the rescan button () in the upper right corner of the web interface.

Workspaces Best Practices

Install the Workspaces Client after the Workspace XE Client.

To ensure the normal functionality of both products, you must first install the Workspace XE client and then the Workspaces Client.

Installing the Workspace Client on macOS Catalina and Later

If macOS Catalina and later does not allow you to open the Workspaces Client installation file by double-clicking it, because Apple cannot check it for malicious software, you must control-click it in Finder, choose Open from the menu, and then click Open in the dialog that appears.

Allowing the User Management of Kernel Extensions on Apple Silicon macOS

Like all third-party software working at system level, the WORKSPACE XE Client software uses the macOS kernel extensions, whose loading should be manually allowed by the user.

By default, under the Apple ARM architecture (M1 and M2 hardware) the operating system uses the strictest security restrictions and disallows the user management of kernel extensions even from identified developers. To enable this option needed for the WORKSPACE XE Client driver to install and run, follow the sample steps below.

Note: Even though the option is available only after you change the level of security on the startup disk to “Reduced”, this poses no risk to your operating system as it is applicable only to signed operating system software ever trusted by Apple to run.

Reboot the macOS Apple Silicon client system into Recovery mode.

1. In the Utilities menu, select Startup Security Utility.
2. In Startup Security Utility, click Security Policy.
3. In Security Policy, do the following:
 - a. Select Reduced Security.
 - b. Select the “Allow user management of kernel extensions from identified developers” check box.
 - c. Click OK.
4. Restart the computer.

Note: For most up-to-date steps about allowing the user management of kernel extensions on ARM-based computers, refer to the Apple documentation at:

<https://support.apple.com/guide/mac-help/change-security-settings-startup-disk-a-macmchl768f7291/mac>

Configure the Web Interface Secure Connection Certificate

The Workspaces web interface is accessible through secure https connection, which uses a self-signed certificate issued by Symply. To spare you the need to confirm that you trust the connection each time you attempt to access the web interface, Symply allows you to download and import the self-signed certificate on Workspaces client computers or any computers on the same network from which you may want to access the web interface in order to configure Workspaces settings or preview proxy media in the depot.

Once the certificate is configured on a computer, the web interface of Workspaces is accessible using the following web address:

`https://workspaces.internal/`

Before you proceed with the steps, you must configure your DNS server or, in case your network does not use a DNS server - each computer, on which you will download and configure the certificate, to resolve requests for access to `https://workspaces.internal/` to the IP address of the Workspace XE appliance. You can do this by either adding a DNS record (on your DNS server) or by editing the Hosts file of the computer.

To download the self-signed certificate on your computer:

1. In a web browser, access the IP address of the Workspace XE appliance through secure https connection (https).

For example, if the Workspace XE has IP address 10.200.6.29, in the address bar of a web browser enter the following:

`https://10.200.6.29`

Tip: To access the web interface on the Workspace XE itself, enter the following:

`https://localhost`

2. On the home page of the Workspaces web interface, click the Downloads button in the upper right corner.
3. Find the certificate file (server.crt) in the list and click Download.

To import the self-signed certificate on a Windows computer:

1. Run Command Prompt as an administrator.

Tip: To run Command Prompt as an administrator, click Start, type cmd, right-click Command Prompt and select "Run as administrator".

2. Execute the following:

```
certutil -addstore "Root" <path to certificate file>
```

For example, if the certificate file is downloaded to C:\temp, execute the following:

```
certutil -addstore "Root" C:\temp\server.crt
```

To import the self-signed certificate on a macOS computer:

Start Terminal and execute the following:

```
sudo security add-trusted-cert -d -r trustRoot -k  
/Library/Keychains/System.keychain <path to certificate file>
```

For example, if the certificate file is downloaded to home directory, execute the following:

```
sudo security add-trusted-cert -d -r trustRoot -k  
/Library/Keychains/System.keychain /home/server.crt
```

Specifying Domain Name and Access Credentials

When using Workspaces in an Active Directory domain environment, it is advisable to provide the name of the domain user account without its domain i.e. “user” instead of “user@domain.com” or “domain.com\user”.

Also, when specifying the domain name, you must use its netBIOS name and not the full DNS name of the domain. For example, if your domain is named “department.example.com”, the netBIOS domain name you must enter would probably be just “example”.

Grant psadmin Account Read and Write Permissions to Volumes (in an Active Directory domain environment)

If you want to enable Workspaces on volumes that are operates in Active Directory domain environment (nod default), the default administrative account psadmin, which is automatically added to the local administrators group on the Workspace XE appliance, must have Read & Write permissions to the volumes even if you have restricted the permissions of the group itself.

Setting Preferred Mount Point of Workspaces on Windows Clients

The setting for preferred mount point of a workspace is part of the global settings of a Windows computer, thus making it valid for all users that log in to the computer. By design, local settings such as mapped network shares always take precedence over global settings. This way, if you specify a preferred mount point of a workspace that uses a drive letter already mapped by a network share, when you attempt to mount the workspace, instead of the workspace drive you will mount the network share.

To avoid such situations, it is advisable to check if the preferred drive letter of a workspace is not already in use.

Avoiding Long File Names

By default, on Windows the length of file names is limited to 260 characters and on macOS - to 1024 characters. On both Windows and macOS, the full path to the file is also included in the character count. That is why it is possible to receive errors when attempting to create or copy a file with long file name. For this reason, it is advisable to avoid long file names in order to ensure that file operations on the shared storage are normally processed.

Generally, on all supported file systems you should try to limit path length (filename included) to below 255 characters.

Moving Workspaces Containing FCPX Library with Linked Media

Even without Workspaces, when your Final Cut Pro X project's library contains linked media, should you move the project on the same or another volume, the media in the library will become offline. The same can be observed with Final Cut Pro X project exported outside the Workspaces depot. Even if the linked media is also exported/moved as part of the workspace, it will appear as offline until you re-link it.

Known Issues

Delayed Notifications about File Operations on macOS Clients

In contrast to Windows clients, on macOS clients the notifications about changes in the workspace contents made on another computer (a new file is created or an existing file is renamed/deleted) may not be instantaneous. Depending on when the change is been introduced, macOS clients may have to wait up to 30 seconds to get a notification about it.

Workspace Remains Mounted After Disconnecting from the Workspace XE

It is possible a workspace to remain in In Use state in the web interface, when a client computer disconnects from the storage server before dismounting the workspace. You should simply close the workspace in the web interface to change its state to Available.

Workspaces Mounted in the Finder after Disconnecting macOS Client from Workspace XE

It is possible a workspace mounted on a macOS client to remain mounted in the Finder, although the client computer has been disconnected from the metadata controller. In case the client has been physically disconnected, although the workspace is mounted in the Finder, users cannot mount it and work with it. When the client computer has been disconnected through the web interface, the workspace is mounted in the Finder and the client can introduce and save metadata changes to it (delete or rename files and folders), but cannot write data to it.

Accessing the Workspaces Web Interface Using Private Mode of Safari Web Browser

You cannot access the web interface of Workspaces using private mode in Safari web browser. The problem is related to the inability of Safari to handle local storage when private browsing. The problem is not observed when using private mode (like Incognito mode in Google Chrome, for example) in other supported web browsers.

Accessing the Web Interface with Safari 11.x and Below

It is advisable to access the web interface of Workspaces through Safari browser using version 12.x and above. Using previous versions of Safari browser may result in inconsistent behaviour.

Mounting Pinned Workspaces After Restarting the Client Computer

It is possible a workspace pinned for your account to not be automatically mounted on your computer after you have restarted your computer. A workaround to the problem is to log out the Workspaces web interface and then log in again.

Mounting and Unmounting Workspaces Which Have Reached Their Quota Limit

When a workspace has reached its quota limit, attempting to mount it on a client computer may fail in the Workspaces' web interface, although the workspace is actually mounted on the computer. This can prevent you from unmounting the workspace in the web interface. Currently, the only workaround to this problem is to free some space in the workspace by deleting some files so that it does not take up all its quota and then close it.

New Quota Setting Lost if Workspace is Moved at the Same Time

It is possible for the Workspaces application to fail to apply the quota setting changes you have introduced, if you also move the workspace to another volume in the Workspace Settings dialog before saving the changes. To ensure that you have applied the changes to the workspace quota, it is advisable to click Submit before moving the workspace and only then re-open the dialog and move the workspace.

Viewing Workspace Drive Size When Quotas are Enabled

When a workspace with a quota is mounted on a client computer, Windows Explorer displays the size of the quota as the size of the workspace drive, while on macOS the operating system displays the size of the volume, on which the workspace is stored, as the size of the drive.

Missing Proxies

It is possible to lose the proxy media generated for a workspace in the following cases:

- if you move a workspace from one volume to another
- if you disable and then enable again support for Workspaces on a volume

To regenerate the proxies for the workspace:

1. Clear the proxies of this workspace.
2. Force the generation of proxies for this workspace, by rescanning it.

Restarting Workspaces to Apply Domain Information Changes.

As standard Workspace XE and the Workspace user and project management software is configured for Workgroup environments. Please contact the Symply support team for assistance in re-figuring the system for an Active Directory environment.

In some cases, changes you have introduced in the Save Domain Info dialog in the web interface may not be applied until you restart Workspace XE. Specifying Active Directory domain info through the Configuration Wizard does not require restart of your Workspace XE appliance.

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