

# SDX Switch Secure Workspace 3.1 quick start guide

## What is SDX Switch Secure Workspace?

SDX Switch Secure Workspace is a secure, cloud-based collaboration platform designed to help users share files and collaborate effectively, both internally and externally. It ensures that data is kept secure both at rest and in transit, and integrates seamlessly with existing document management systems. It does all of this whilst maintaining Switch's award-winning ease of use.

## Stage one: Accessing SDX Switch Secure Workspace

1. Navigate to your SDX Switch Secure Workspace web address using any internet browser. This should have been issued to you by your SDX Support representative.
2. At the SDX Switch sign-in page, sign in with your Switch ID. Alternatively, since SDX Switch supports single sign-on, you may be able to sign in using your usual system ID.

**switch**<sup>®</sup>  
secure data exchange

To access the secure message **LB-160212-110255** please sign in with your Switch ID.

If you do not have a Switch ID, [create it for free](#). This will only take a minute and will be required **once**.

Switch ID:

Password:

Remember my Switch ID

[New User?](#)  
Create a Switch account. It's free.

[Forgot Your Password?](#)  
Reset your Switch password.

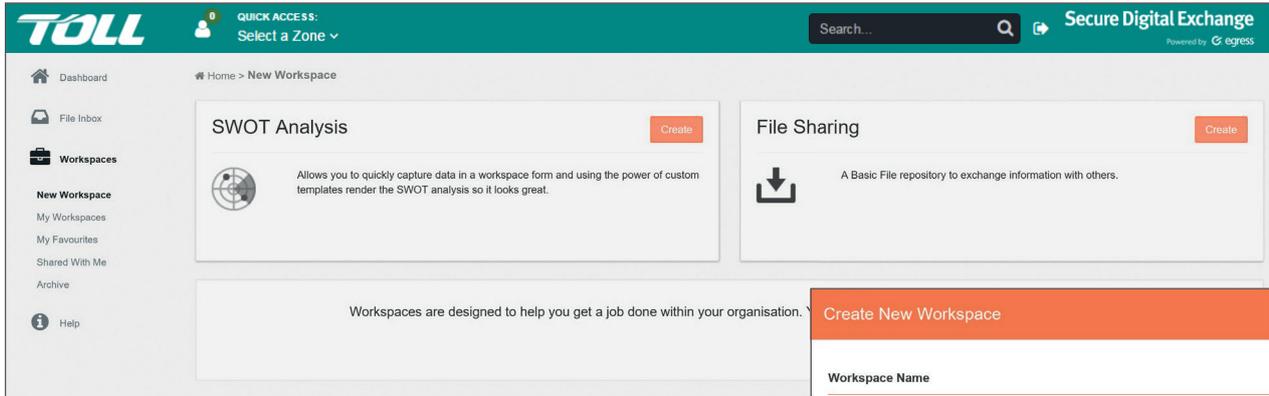
[What Is Switch?](#)  
Learn more about Switch.

You will have been assigned a specific user role which determines the actions you can perform on SDX Switch Secure Workspace. Some of the features in this guide may not be available to you if you do not have the required permissions.

## Stage two: Creating a new workspace

A workspace is a secure area for uploading files to share with internal and external recipients.

1. To create a new workspace, select **Workspaces - New Workspace** on the sidebar. Choose a workspace template and then select **Create**.

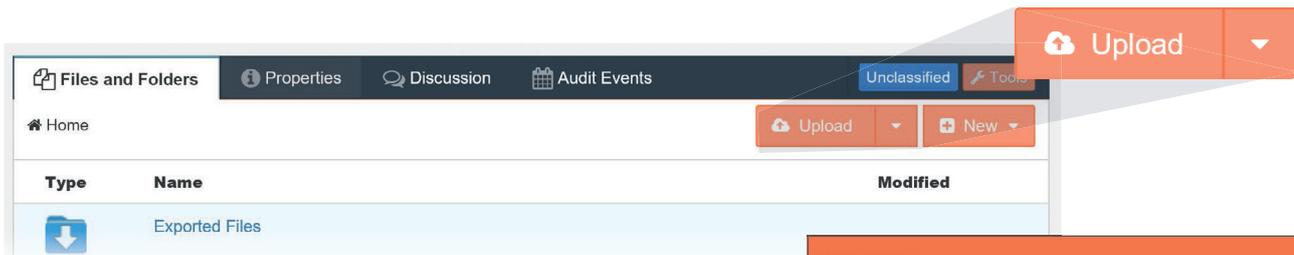


2. Give the new workspace a title and a description. Use the dropdown menu to specify the security classification of the workspace.
3. Make the workspace active using the tick box at the bottom of the page.
4. Press **Save** to create the workspace.



## Stage three: Adding files to a workspace

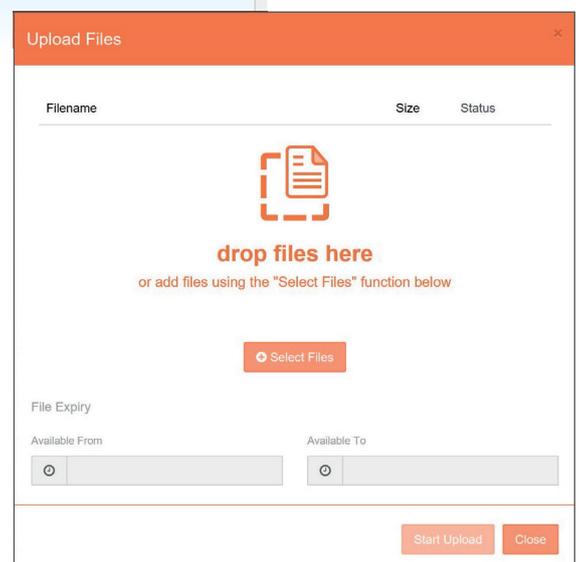
4. To add files to a workplace, navigate to the workspace using **Workspaces – My Workspaces**. Select the workspace you wish to add files to, and then press the **Upload** button.



2. Press **Select Files** to browse for files, or simply drag and drop them into the window. Use the **File Expiry** options to set availability and expiry dates for your files, restricting when others can access them.

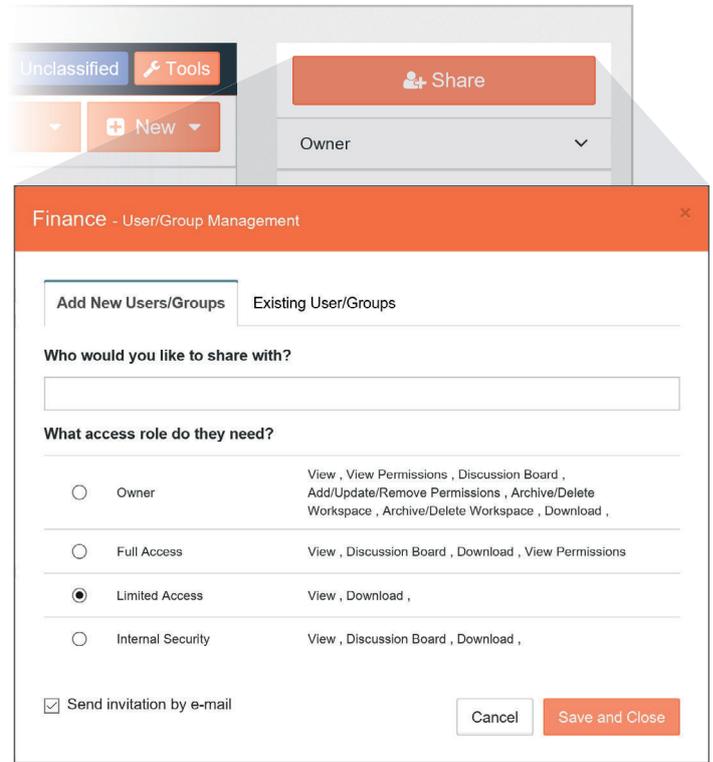
Press **Start Upload** to upload the files. Once uploaded, files appear in the main workspace window.

- Click on a file to view it in-browser using the built-in Document Viewer.



## Stage four: Sharing a workspace

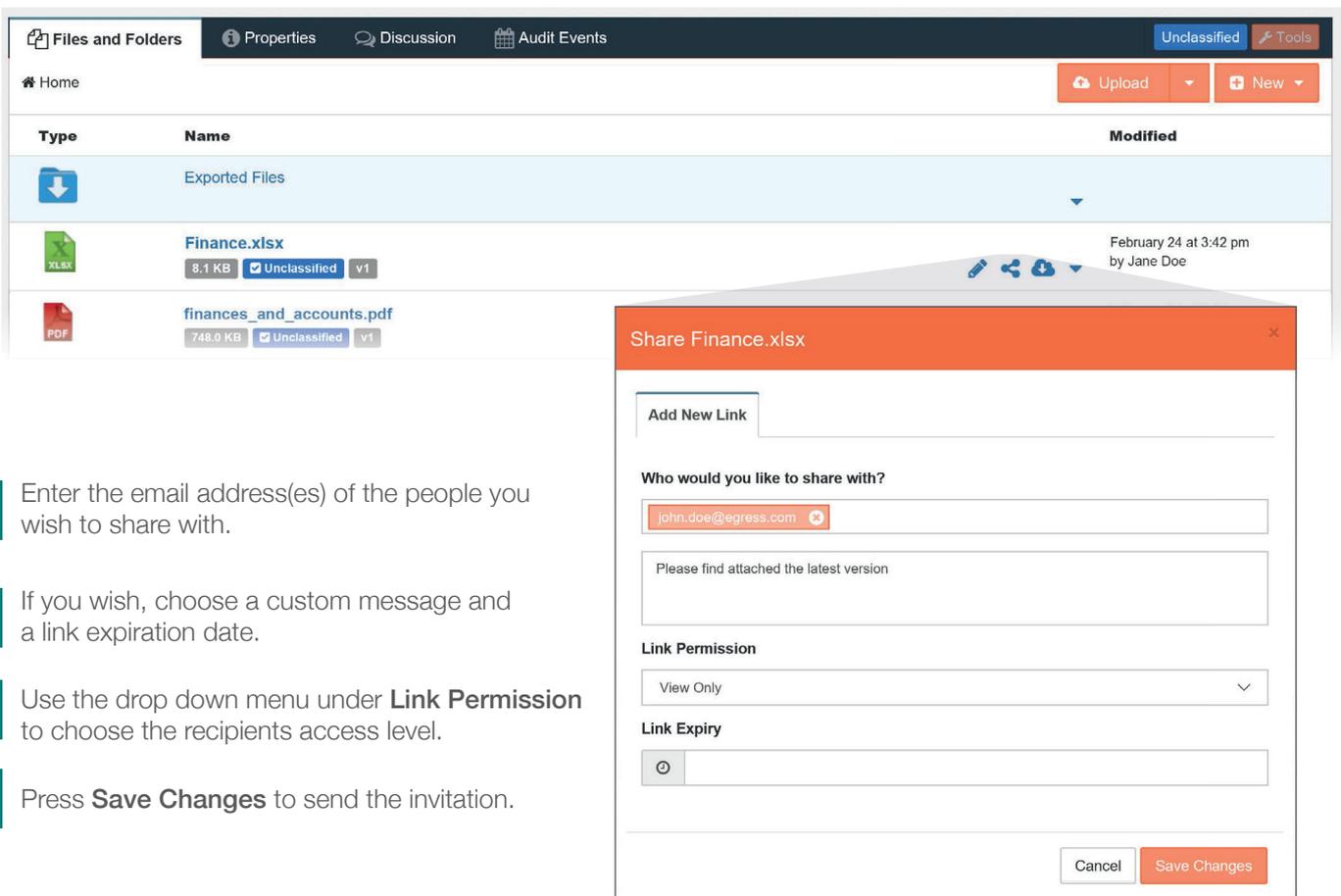
1. To share a workspace with other users, click the **Share** button on the right hand side of the workspace.
2. This opens the share dialog box. To share with other users:
  - Enter their email address(es).
  - Select the access level you wish to give them.
  - Select whether they should receive an invitation email.
3. Press **Save and Close**. The new users will be automatically granted access to the workspace and sent an invitation email if specified.



## Stage five: Sharing a file

Rather than share access to an entire workspace, you may want to share a link to an individual file.

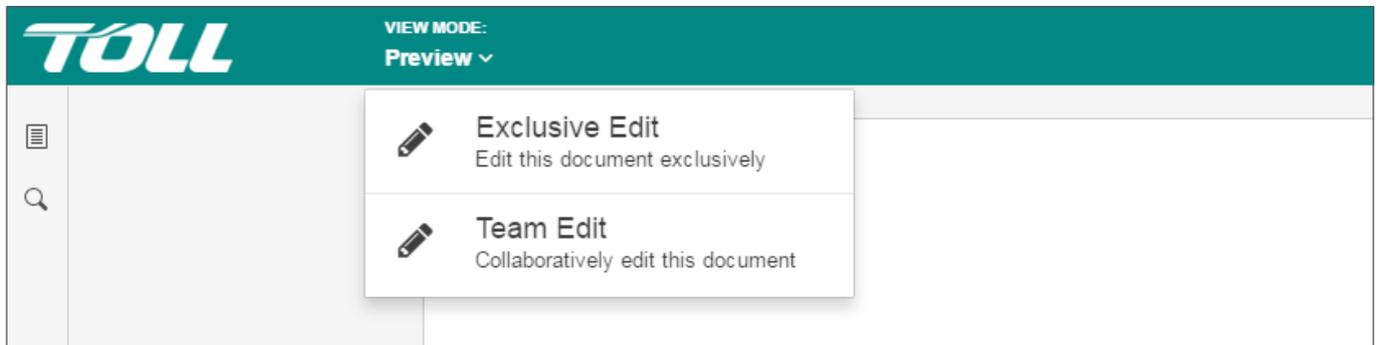
1. Select the share icon next to a file in a workspace. 



## Stage six: Editing a document

Switch Secure Workspace 3.1 features inline document editing of Microsoft Office documents including real-time updating and tracked changes. Documents can be edited collaboratively or exclusively. To start editing a document:

1. In a workspace, select the document you wish to edit. This enters Preview mode.
2. Use the View Mode drop-down menu to choose **Exclusive Edit** or **Team Edit**.



3. Edit the document using the feature-rich, user-friendly editing environment.

Document changes are saved and displayed automatically when only one user is editing. When two or more users are editing simultaneously there are two options for displaying changes. Each user's changes are saved automatically but to update the document for the other users there are two options:

**Fast** – When one user makes an edit, the changes automatically appear on the other user's display in real-time, with the editor's name appearing next to the cursor. This is the default co-editing mode.

**Real-time collaborative editing**

**Strict** – Each user's changes need to be saved manually in order for the other users to see them. The other users then need to refresh the document in order to see these changes.



A user who has made changes to the document when collaborating sees a save icon like this. Press the save icon to commit the changes so that others can see them.



A user who needs to reload the document to see another user's edits will see a save icon like this. Press this icon to refresh the document with the latest changes. Any changes the user was working on at the time before refreshing the document will be saved.

Co-editing mode



To change the co-editing mode go to **File > Advanced Settings**.

### Learn more about SDX Switch Secure Email

Visit [www.mysdx.com/support](http://www.mysdx.com/support) for video tutorials on using SDX Switch Secure Email, including how to:

- Access a secure message
- Manage your messages and control access to them in real time
- Send large files securely
- Approve or deny access requests to secure messages

### Technical support

Should you encounter any problems using SDX Switch Secure Email or have any technical questions, please get in touch with your SDX Technical Engineer or contact our Customer Support team at 1800 768 043 or [sdx@tollgroup.com](mailto:sdx@tollgroup.com)