



Overview

WECC's Secure Workspace is a file transfer program that allows users to send and receive large or confidential files and folders. Before exchanging files, external stakeholders must be granted access and log in to WECC's Secure Workspace. The workspace requires users to set up multifactor authentication (MFA) before logging in.

Secure Workspace Account Setup

1. Stakeholders must have a wecc.org account to access the workspace. You can sign up for a wecc.org account by following the instructions under "WECC.org account setup."
2. Go to <https://secureworkspace.wecc.org> using Chrome, Firefox, Edge, or Safari. Internet Explorer is not supported.
3. At the Okta login screen, enter your WECC website credentials.
4. If you receive an error that you have not been assigned the application in Okta, please email Administrative Services at support@wecc.org.
5. Set up multifactor authentication. For detailed instructions on your options, please read the [MFA Enrollment Instructions](#).
6. Once you are logged in to the Secure Workspace, you have created your account and can receive and send files as needed.

WECC.org Account Setup

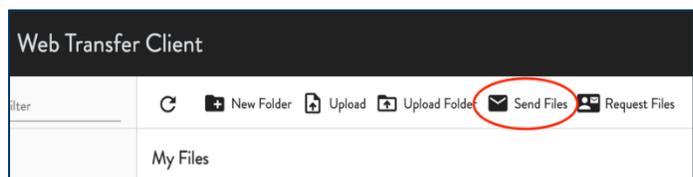
1. To get credentials for the WECC website, go to WECC's homepage (www.wecc.org), and select "LOGIN" at the top right.
2. Generate the information form by choosing "sign up."
3. Once you submit the form you will select "send me an email" to receive the verification.
 - a. Locate the email message asking for verification of your email address and click the link to verify your new account. If you do not see the email in your inbox, check your spam folder.
4. After creating and verifying your account, please email Administrative Services (support@wecc.org) to request Secure Workspace access.
5. Once you receive confirmation from Administrative Services that you have been granted access to Secure Workspace, please follow the steps under "Secure Workspace Account Setup."

Secure Workspace User Guide

Once you have set up multifactor authentication, you will be able to access the Secure Workspace. Use your WECC credentials to log in at <https://secureworkspace.wecc.org>.

To Send a File:

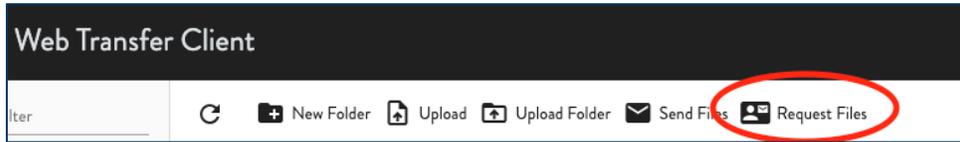
1. Click “Send Files.”
2. Enter a WECC employee’s email in the “To” field.
3. Enter a subject.
4. Write a message. The message can be sent securely if the box is checked. This will require your recipient to log in to see your message.
5. Click “Upload” and select the file you want to send.
6. Click “Options.”
 - a. “Delivery Notifications” allows you to select when/whether you are notified once the file you are sending is downloaded.
 - i. “Notify me immediately” will send you an email as soon as the file is downloaded.
 - ii. “Daily Digest” will send you one email per day for all files sent by this method.
 - iii. “Don’t notify me” will not send any notification.
 - b. “Message Expiration” allows you to control how long the message is available for download.
 - i. “Immediate” will cause the message to expire immediately when all recipients have downloaded the file. Otherwise, the message will expire in 14 days if the recipient has not downloaded the file.
 - ii. “One day” will set the message to expire 24 hours after it is sent, regardless of whether the file was downloaded.
 - iii. The date is a rolling 14-day expiration, which is the maximum allowed. The file will expire 14 days after it is sent, regardless of whether the file was downloaded.
 - c. You can also select “Save as Default,” which will save your settings for the next time you send a file.
7. Once finished, click “Send.” Your recipient will get an email saying you sent them a file.



Secure Workspace Account Setup

To Request a file

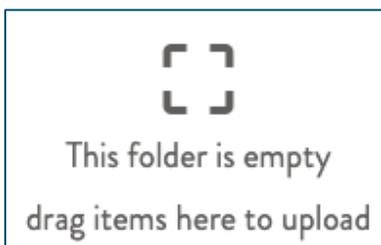
1. Click "Request Files."



2. Enter a WECC employee's email address in the "To" field.
3. Enter a subject.
4. Write a message. The message can be sent securely if the box is checked. This will require your recipient to log in before they see your message.
5. Click "Options."
 - a. "Message Expiration" allows you to control how long the message is available for download.
 - i. "Immediate" will cause the message to expire immediately when all recipients have downloaded the file. Otherwise, the message will expire in 14 days if the recipient has not downloaded the file.
 - ii. "One day" will set the message to expire 24 hours after it is sent, regardless of whether the file was downloaded.
 - iii. The date is a rolling 14-day expiration, which is the maximum allowed. The file will expire 14 days after it is sent, regardless of whether the file was downloaded.
 - b. Optionally, you can select "Save as Default," which will retain your settings for your next file send.
6. Once finished, click "Request." Your recipient will get an email notification that you have requested a file, and once the file is sent, you will get a notification that the message is ready for you. The maximum retention period is 14 days, so make sure you retrieve your file before then.

File Repository

Upon login, you will see this icon and text:

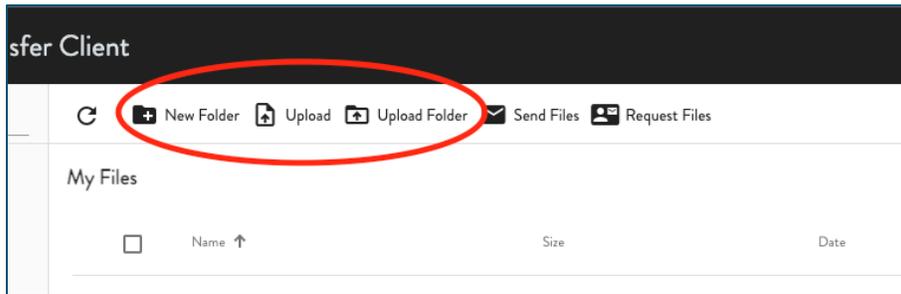


- This is your personal file repository. Files uploaded here will **not** be sent to WECC employees unless you follow the "Send Files" procedure above. This folder is monitored, and has a seven-day retention policy. All files will be deleted seven days after upload.



Secure Workspace Account Setup

- You can upload individual files by dragging them into this page, or by clicking the “Upload” button at the top. You can upload a folder by clicking “Upload Folder.”



- You may create new folders using the “New Folder” icon. The folders will remain; however, any files contained within the folder will be deleted after seven days.

Viewing Messages

On the left side of the screen, you will see a “Received Messages” and “Sent Messages” link.

- “Received messages” shows any messages that have recently been sent to you, who sent them, the subject, body, filename(s), and expiration. You can click on the row to view them one at a time, as well as download the file that was sent. Upon expiration, the row will be deleted.
- “Sent messages” shows active file transfers you have recently sent, the date, recipients, subject, body, filename(s), and expiration. You can click on the row to view detailed information as well as download the file you sent. Upon expiration, the row will be deleted.

Collaboration Folders

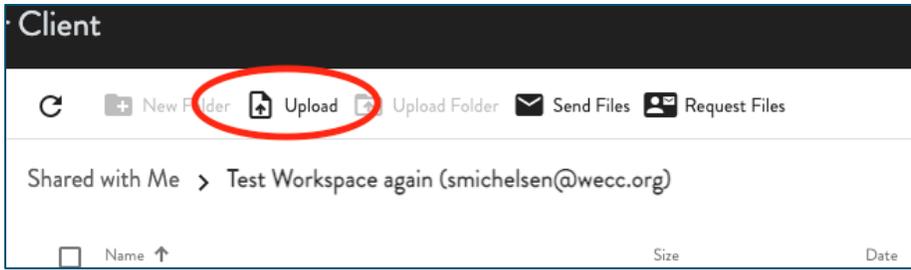
If you have been invited to a collaboration folder, you can view it under the “Shared with me” link. Here, you can view all your collaboration folders. Selecting the checkbox next to the folder will allow you to view the details of the workspace.

- “Recipients” shows who has access to the folder.
- “Comments” is an open field where users can add comments to the folder. You can see other user’s comments here as well.
- “History” shows a log of files that were uploaded, downloaded, or deleted from the workspace.
- “Notifications” allows you to configure emails you get from the workspace. You can choose to get a daily or immediate notification when files are added, downloaded, renamed, deleted, or comments are added.
- “Expiration” shows the current date the workspace is scheduled to expire. Note that files may have separate retention policies outside the folder expiration.

Depending on your permissions, when you are added to a workspace, you may have the ability to upload a file. To do so, you may either click the “Upload” button, or drag and drop your file into the workspace.



Secure Workspace Account Setup



Files uploaded to the workspace will be visible to *all* workspace users and may be subject to separate retention policies outside of the workspace expiration.

