Workspaces

Documentation · https://viaspaces.com/Documentation/workspaces/

An access boundary inside your account — plus a way to receive documents from outside it.

A workspace splits your account into separate areas: users and groups assigned to a workspace only see the documents assigned to it.

Creating a Workspace

1. Open **Workspaces** and click **Add Workspace**.
2. Enter a Name and Description.
3. Set the Status.
4. Configure Directory Services if you need to.
5. Select Users and Groups to give access.
6. Click **Save**.



Hint: An **Active workspace** is offered when assigning documents and templates. An **inactive one** is left out of new assignments, but keeps its existing documents and stays visible under the All tab.

Directory Services

Directory Services controls whether a workspace can receive documents from senders who aren't already connected as a business partner.

Setting	What it does
Receiving external documents	Lets the workspace receive documents from outside your account.
Visible publicly	Nested under the setting above; lists the workspace in ViaSpaces' public directory so an outside sender can address a document to it without an existing connection.

This is separate from sharing a workspace with a partner you're already connected to through a Business Card.

Managing Workspaces

The Workspaces list has **Active** and **All** tabs, showing each workspace's Name, Users, and User Groups, with view, edit, and delete controls per row. The view control opens an Overview summarizing its description, status, Directory Services settings, users, and groups.

A workspace is deleted once all documents have been removed from it.



Hint: Renaming a workspace updates its name everywhere it's referenced — Dashboard filters, template assignments, and the Document Editor all pick it up automatically.