



Intralinks Designer

Installation Guide

For IT Professionals

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Introduction

The *Intralinks Designer Installation Guide for the IT Professional* provides guidance on advanced installation options that should typically be handled by an IT professional.

System requirements

The following components must be installed on the computer where Intralinks Designer will be installed:

- One of the following 32-bit or 64-bit operating systems:
 - Microsoft® Windows 7
 - Microsoft Windows XP with Service Pack 3 or later
 - Microsoft Vista
- 32-bit or 64-bit processor
- RAM: 1 GB
- Runtime System: Microsoft Windows .NET Framework version 2.0 or higher
- Disk space: 500 MB (minimum), plus an additional 280 MB if .NET Framework is not yet installed
- CPU: 1 GHz (minimum)

Connectivity requirements

- Server: <https://webservices.intralinks.com> or <https://services.intralinks.com>
- Port: 443
- Protocol: HTTPS

Other requirements

The user must have write access to the directory in which Intralinks Designer will be installed and to the following directory where Intralinks Designer session data will be stored:

```
C:\Documents and Settings\\Application  
Data\ILClient
```

Also, the recommended screen resolution for optimal viewing should be 1024 x 768 or higher.

Additional requirements are:

- 64-bit terminal running Citrix for remote access

Before installing Intralinks Designer

Before you install Intralinks Designer, you need to:

1. Make sure you have Microsoft .NET Framework 2.0 or a later version installed on your computer.
2. Remove the previous version of Intralinks Designer from your computer.

If you wish to install FileSplit FileSplit, a component of Intralinks Designer that can be used to distribute investor statements, requires a special installer. If you wish to use FileSplit, contact your Intralinks representative to get the installer that will give you access to both Intralinks Designer and FileSplit.

Checking for Microsoft .NET Framework

To find out if Microsoft .NET Framework 2.0 or a later version is installed:

1. From the **Start** menu, select **Control Panel**.
2. Depending upon the version of Windows that you are using, do one of the following:
 - Double-click **Add or Remove Programs**.
 - Click **Programs and Features**.

A list of applications that have been installed on your computer appears.

3. Scroll through the list of installed programs until you see “Microsoft .NET Framework.” (You may have multiple versions of this software.) Be sure that version 2.0 or a newer version is installed.

If you do not see this program listed, you can download it from the Microsoft website. The latest version is available at:

<http://www.microsoft.com/net/>

Follow the download instructions that appear on the Microsoft website. Intralinks Designer will detect if .NET Framework is not installed and display a message stating that it is required.

Removing a previous version of Intralinks Designer

► To remove a previous version of Intralinks Designer

1. From the **Start** menu, select **Control Panel**.
2. Depending upon the version of Windows that you are using, do one of the following:
 - Double-click **Add or Remove Programs**.
 - Click **Uninstall a program**. (You may have to double-click the **Programs and Features** icon to display this option.)

A list of applications that have been installed on your computer appears.

3. Select **Intralinks Designer** from the list of programs and click **Remove** or **Uninstall**.

After a few seconds, a prompt requests you to either continue or end the removal process.

4. Click **Yes** to continue.

The wizard continues with the removal process and displays a window to alert you when the removal of the previous version of Intralinks Designer is complete.

5. Click **Finish**.

Installing Intralinks Designer

The Intralinks Designer installer guides you through the installation process. The installer and user manuals are available at:

<http://www.intralinks.com/ildesigner/>

► To install Intralinks Designer

1. Using a web browser, go to <http://www.intralinks.com/ildesigner/>
2. Click the **Download Now** button. A dialog box appears allowing you to choose a location for the file.
3. Note the name of the file, and download it to your Windows desktop.
4. Double-click the file. A **Welcome** screen is displayed.
5. Review the contents of the **Welcome** screen, then click **Next**. The **License Agreement** screen appears.
6. Read the End User License Agreement carefully. You must agree to the terms of the agreement before continuing with the installation. If you have any questions about the license agreement, please contact Intralinks customer support.
7. Agree to the terms of the agreement by selecting the **I Agree** option, then click **Next**.
8. Review the location where Intralinks Designer will be installed. If you wish to change the default location, click the **Browse** button and select the folder in which you want to install Intralinks Designer.

If you use the default location, an Intralinks folder will automatically be created at the root level of the C: drive. The Intralinks Designer application and its associated files will be installed within this folder.

9. (Optional.) If more than one person uses this computer and you have set up a separate user account for each person, you can limit others' ability to view and use Intralinks Designer by selecting the **Just me** option. If you have not set up multiple user accounts or if other users should have access to Intralinks Designer, select the **Everyone** option.
10. Click **Next**.
11. Click **Next**. Installation begins.

When Intralinks Designer has been installed, the wizard informs you that the process has been completed.
12. Click **Close** to close the wizard and exit the setup program.

Checking for updates to Intralinks Designer

► To check for updates to Intralinks Designer

Note: If an update is available and you choose to install it, both Intralinks Designer and Intralinks Courier will be closed before installation begins. Be sure to complete any tasks that are underway before beginning the installation process.

1. From the **Help** menu, select **Check for Updates**.
2. If your software is up to date, a message appears to alert you. Click **OK**. You do not need to do anything further.

If an update is available, a message appears giving you the option to install the update. Continue with the following steps.

3. (Optional.) To learn about the changes made to Intralinks Designer in this update, click the **What's New** button. A web browser window will open, displaying information about the update.
4. To begin installing the update, click **Yes**.
5. A message appears warning you that Intralinks Designer and Intralinks Courier will be closed before installation begins. If you have any unfinished tasks in either application, complete them now.
6. When you are ready to begin installation, click **Continue**. Intralinks Designer will be closed, and the update will be downloaded and installed.
7. A message appears to let you know when installation is complete. Click **Close**.

To begin using the updated version of Intralinks Designer, you must restart the application.

Configuring Intralinks Designer

Users can configure Intralinks Designer to suit their individual work style using the **Options** window, which can be displayed by choosing **Options** from the **Tools** menu. Systemwide changes must be made by an IT administrator and deployed to affected users. You may need to configure proxy settings, for example, or remove access to Intralinks Designer's Remember Me function if your organization's security policy precludes its use.

Manual configuration changes are made to the WSB.Config file, which typically is located at `C:\Intralinks\Intralinks Designer\Config\`. Changes can be made using Notepad or another text editor.

Once you have made changes to WSB.Config, you must run Intralinks' CRCGenerator utility (`crcgenerator.exe`) to validate your changes. CRCGenerator creates a file, `template.bat`, that must be copied to the Intralinks Designer installation folder on the user's computer, typically `C:\Intralinks\Intralinks Designer\`. If you are deploying configuration settings to a number of users, copy the modified WSB.Config file to the Config folder within the installation folder.

CRCGenerator is available from Intralinks Client Services.

► To validate changes to the configuration file using CRCGenerator

Complete the following steps after making changes to the WSB.Config configuration file.

1. Locate the WSB.Config configuration file and copy `crcgenerator.exe` to this location.
2. Open the Windows Command Prompt: Select **Start > Run**, then enter `cmd` and click **OK**. The Command Prompt (`cmd.exe`) appears.
3. Using the Change Directory (`cd`) command, go to the location where WSB.Config and `crcgenerator.exe` are located. For example, type:

```
cd c:\Intralinks\Intralinks Designer\Config\
```

Then press ENTER.

4. At the command prompt, type:

```
crcgenerator.exe wsb.config
```

Then press ENTER. CRCGenerator validates the contents of the configuration file and updates the file `template.dat`.

5. Copy WSB.Config and `template.dat` to the user's computer or the network drive where Intralinks Designer is located:
 - Copy WSB.Config to the Config folder within the Intralinks Designer installation folder (typically located at `c:\Intralinks\Intralinks Designer\Config\`).
 - Copy `template.dat` to the Intralinks Designer installation folder (typically located at `c:\Intralinks\Intralinks Designer\`).

Choose to overwrite the existing files in these locations.

Removing the Remember Me option from the login screen

Follow the steps below to change users' WSB.Config configuration file to remove the Remember Me option from Intralinks Designer's login screen.

Note: If your organization also uses Intralinks Courier, you must make this change to the WSB.Config configuration file for Intralinks Courier, as well. The configuration files for these applications are not synchronized automatically. The WSB.Config file for Intralinks Courier can be found in the Config folder within the Intralinks Courier installation folder.

► To remove the Remember Me option from the login screen

1. Locate the WSB.Config configuration file and open it using Notepad or another text editor.
2. Locate the value `AllowRememberMe`:

```
<add key="AllowRememberMe" value="true"/>
```

3. Change the value to false:

```
<add key="AllowRememberMe" value="false"/>
```

4. Save your changes and close the configuration file.
5. Copy the CRCGenerator utility to the folder containing the WSB.Config file.

6. Open the Windows Command Prompt: Select **Start > Run**, then enter `cmd` and click **OK**. The Command Prompt (cmd.exe) appears.
7. Using the Change Directory (cd) command, go to the location where WSB.Config and crcgenerator.exe are located. For example, type:


```
cd c:\Intralinks\Intralinks Designer\Config\
```

 Then press ENTER.
8. At the command prompt, type:


```
crcgenerator.exe wsb.config
```

 Then press ENTER. CRCGenerator validates the contents of the configuration file and updates the file template.dat.
9. Copy WSB.Config and template.dat to users' computers or the network drive where Intralinks Designer is located:
 - Copy WSB.Config to the Config folder within the Intralinks Designer installation folder (typically located at `C:\Intralinks\Intralinks Designer\Config\`).
 - Copy template.dat to the Intralinks Designer installation folder (typically located at `C:\Intralinks\Intralinks Designer\`).
 Choose to overwrite the existing files in these locations.

Removing Intralinks Designer's auto update function

Follow the steps below to change users' WSB.Config configuration file to remove Intralinks Designer's auto update function.

► To remove Intralinks Designer's auto update function

1. Locate the WSB.Config configuration file and open it using Notepad or another text editor.
2. Locate the value AdminCheckForUpdates:


```
<add key="AdminCheckForUpdates" value="1"/>
```
3. Change the value to 0:


```
<add key="AdminCheckForUpdates" value="0"/>
```
4. Save your changes and close the configuration file.
5. Copy the CRCGenerator utility to the folder containing the WSB.Config file.
6. Open the Windows Command Prompt: Select **Start > Run**, then enter `cmd` and click **OK**. The Command Prompt (cmd.exe) appears.
7. Using the Change Directory (cd) command, go to the location where WSB.Config and crcgenerator.exe are located. For example, type:


```
cd c:\Intralinks\Intralinks Designer\Config\
```

 Then press ENTER.
8. At the command prompt, type:


```
crcgenerator.exe wsb.config
```


Then press ENTER. CRCGenerator validates the contents of the configuration file and updates the file template.dat.

9. Copy WSB.Config and template.dat to users' computers or the network drive where Intralinks Designer is located:
 - Copy WSB.Config to the Config folder within the Intralinks Designer installation folder (typically located at `C:\Intralinks\Intralinks Designer\Config\`).
 - Copy template.dat to the Intralinks Designer installation folder (typically located at `C:\Intralinks\Intralinks Designer\`).

Choose to overwrite the existing files in these locations.

Making changes to proxy settings

Intralinks Designer requires access to the Internet. If your organization uses a web proxy server to connect to the Internet, users can enter proxy settings each time they log into Intralinks Designer. Alternatively, you can make changes to the Proxy.config configuration file to enable proxy connections. See the Intralinks Proxy Settings Guide for information on how to do this. The Proxy Settings Guide is available at the location where you obtained the Intralinks Designer installation program. (See page 5 for details.)

Enabling Single Sign-On (SSO) and Exclusive Single Sign-On (E-SSO)

If your organization uses Intralinks' SSO or E-SSO functionality, use the steps below to enable Intralinks Designer to be launched either from Intralinks Platform or directly from the desktop. Access will be controlled by your organizations' access control and identity management systems. E-SSO users will not be assigned a separate set of login credentials for Intralinks products.

► To enable SSO and E-SSO

1. Locate the WSB.Config configuration file and open it using Notepad or another text editor.
2. Locate the value SSOUrl:


```
<add key="SSOUrl" value=""/>
```
3. Change the value to the URL used to launch Intralinks Designer:


```
<add key="SSOUrl" value="http://ilp"/>
```
4. Save your changes and close the configuration file.
5. Copy the CRCGenerator utility to the folder containing the WSB.Config file.
6. Open the Windows Command Prompt: Select **Start > Run**, then enter `cmd` and click **OK**. The Command Prompt (cmd.exe) appears.
7. Using the Change Directory (cd) command, go to the location where WSB.Config and crcgenerator.exe are located. For example, type:

```
cd c:\Intralinks\Intralinks Designer\Config\
```

Then press ENTER.

8. At the command prompt, type:

```
crcgenerator.exe wsb.config
```

Then press ENTER. CRCGenerator validates the contents of the configuration file and updates the file template.dat.

9. Copy WSB.Config and template.dat to users' computers or the network drive where Intralinks Designer is located:
 - Copy WSB.Config to the Config folder within the Intralinks Designer installation folder (typically located at **C:\Intralinks\Intralinks Designer\Config**).
 - Copy template.dat to the Intralinks Designer installation folder (typically located at **C:\Intralinks\Intralinks Designer**).

Choose to overwrite the existing files in these locations.