



Intralinks Designer

# User Guide

For IL5 Workspaces

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# Table of Contents

<b>Chapter 1: Welcome .....</b>	<b>4</b>
Terms used in this document .....	4
Additional resources.....	5
<b>Chapter 2: Getting started .....</b>	<b>6</b>
Before you use Intralinks Designer.....	6
Starting Intralinks Designer .....	6
Ending your current Intralinks Designer session .....	7
Checking for updates to Intralinks Designer.....	8
Getting to know the Intralinks Designer interface .....	9
The Intralinks Designer screen .....	9
The toolbar.....	11
The menu bar.....	11
Right-click menus.....	11
The status bar .....	12
Using the Intralinks Connection icon .....	12
<b>Chapter 3: Managing documents.....</b>	<b>13</b>
Creating folders and publications .....	13
Indexing folders and their contents .....	13
Creating folders and publications.....	14
Adding content to your workspace .....	14
Adding content to indexed and unindexed folders .....	16
Renaming documents and folders using an import file.....	17
Comparing the contents of your computer with your Intralinks workspace.....	18
Setting permissions for publications .....	19
About document protections .....	20
Reorganizing workspace content .....	21
Renaming content items .....	21
Moving staged content.....	21
Copying staged content .....	22
Deleting staged content .....	22
Restoring deleted content .....	22
Saving a staged workspace .....	23
Freezing and unfreezing workspaces.....	23
Previewing your changes .....	24
<b>Chapter 4: Managing workspace users.....</b>	<b>25</b>
Managing users on your workspace.....	25
Adding a user.....	25
Adding a group.....	26
Importing group information .....	27
Importing information about users.....	29
Importing information about users to multiple workspaces .....	36
Viewing a report of the changes made during importing.....	39
Exporting information about users .....	39

<b>Chapter 5: Queuing and uploading your changes to the Intralinks primary service .....</b>	<b>40</b>
Queuing your changes .....	40
Updating additional workspaces .....	41
Uploading your changes .....	42
Viewing workspace upload information .....	43
Viewing upload errors .....	43
Viewing the upload log file .....	43
Viewing and fixing indexing errors .....	43
<b>Chapter 6: Downloading information from your workspace .....</b>	<b>45</b>
Using the Download Wizard .....	45
Options for downloading information using the Download Wizard .....	46
<b>Appendix A: Menu and toolbar shortcuts .....</b>	<b>49</b>
<b>Appendix B: Users' roles within a workspace .....</b>	<b>50</b>
<b>Index .....</b>	<b>52</b>

# Chapter 1: Welcome

Intralinks Designer provides an easy way to organize and manage the content and users of your workspaces. This Windows-based application acts as a staging area for creating and setting up new Intralinks workspaces and modifying existing workspaces.

Using Intralinks Designer, you can:

- Add new content from your local drives
- View and update existing workspace content
- Reorder workspace content items
- Delete content from the Intralinks workspace
- Set users' permissions to use documents
- Add, remove and synchronize user information with other databases

When you have finished staging the workspace and updating user information, you can upload the new or modified information to the Intralinks primary service.

Using Intralinks Designer, you can *index* and *freeze* workspaces. You can use the indexing feature to clearly order your content and as a way to easily reference to specific content. For example, you can distinguish among exact copies of the same document in multiple locations on your workspace by its unique index number. Freezing a workspace in Intralinks Designer enables you to retain the order of existing workspace content.

Intralinks Designer is designed to be used with both Intralinks Platform exchanges and IL5 workspaces. It can be used by workspace managers (those with the Manager Plus, Hidden Manager Plus and Manager roles) and those with the Publisher Plus role.

This User Guide is designed for use with IL5 workspaces. If you are working with an Intralinks Platform exchange, please refer to the *Intralinks Designer User Guide for Intralinks Platform*.

## Terms used in this document

The following terms are used throughout this User Guide:

- “Intralinks primary service” refers to the Web-based Intralinks workspaces that users will log into, and not the workspaces viewed in Intralinks Designer. Think of the Intralinks primary service as the original versions of your workspaces; the versions you view in Intralinks Designer are copies that you are free to change. When you upload these changes, your original workspaces are updated.
- The term “content item,” or either word used alone, refers to the folders, publications and attachments that appear on your workspaces.

## Additional resources

If you haven't installed Intralinks Designer, see the *Intralinks Designer Installation Guide*. A comprehensive Help system is built into Intralinks Designer. You can display it by selecting **Intralinks Designer Help** from the **Help** menu or by pressing the F1 key.

# Chapter 2: Getting started

## Overview

Read this chapter to learn about:

- Starting and exiting Intralinks Designer
- The Intralinks Designer screen and the tools within it
- Menus and shortcut keys
- Accessing Intralinks Designer using the Intralinks Connection icon

## Before you use Intralinks Designer

You will log into Intralinks Designer using your email address and Intralinks password. If you have a temporary Intralinks password, you must first log into Intralinks and change your password before logging into Intralinks Designer.

## Starting Intralinks Designer

If you have difficulty logging in, contact Intralinks Customer Service for assistance. You can find contact information on the first page of this User Guide.

### ► To start Intralinks Designer

1. From the Windows **Start** menu, choose **All Programs > Intralinks > Intralinks Designer > Intralinks Designer**. The login screen appears.
2. Enter your email address and password.

Note that temporary passwords do not work with Intralinks Designer. If you haven't already created a permanent password, log into the Intralinks primary service, where you will be prompted to create a permanent password. Once you have done so, return to Intralinks Designer and log in using your new, permanent password.

(Depending upon the security settings for your workspace, you also may be asked to answer a challenge question or enter a one-time password that is emailed to you. If this is the case, follow the instructions on the screen.)

3. If you want your email address and password to be displayed automatically when you log into Intralinks Designer in the future, mark the **Remember me** option.

Note that some organizations do not allow the use of this option, and it may not appear on your screen. When you start Intralinks Designer in the future, your address and password will be displayed automatically. Your password will be displayed as a series of asterisks (for example, \*\*\*\*\*). When you mark this option, your address and password are remembered for up to 30 days, or until you log out or your password is changed.



4. If your organization uses a proxy server to provide access to the Internet, click the **Options** button to enter settings for the server. If your organization does not use proxy authentication or if you previously entered this information, skip this step.

Contact your organization's IT team if you are unsure whether you need to make entries here and to obtain the information required for these fields.

5. Click **Log In**. The **Intralinks Designer** screen appears.

### ► To select a workspace

1. A list of the workspaces you are allowed to modify is displayed. Double-click the workspace you want to work with.

Intralinks Platform exchanges can be identified by a blue cube icon . IL5 workspaces can be identified by an icon of a hand holding a white cube .

This User Guide is designed for use with IL5 workspaces. If you are working with an Intralinks Platform exchange, please refer to the *Intralinks Designer User Guide for Intralinks Platform*.

2. Double-click the name of the workspace you want to work with. You can also select the workspace from the **Exchange** drop-down list.
3. Depending upon the settings for this workspace, you may be required to view and accept a workspace agreement before continuing. If a splash screen containing a workspace agreement appears, read the agreement, then click **Accept** or **Continue**.

A snapshot of your workspace appears in Intralinks Designer's staging area. You are ready to begin adding and organizing the content that will appear on the workspace.

If you are working with a new workspace for which no content has been added yet, you will see an icon for the workspace in the staging area, but the rest of the staging area is empty.

**Note:** If your computer is not connected to the Internet or the Intralinks primary service is not available, the list of workspaces that appears in step 3 includes only those workspaces that you have worked on previously and saved but have not yet updated.


### ► To display the same workspace each time you start Intralinks Designer

If you usually work with a particular workspace, you can set Intralinks Designer to display that workspace automatically when you start the application.

1. From the **Settings** menu, select **Intralinks Designer Options**. The **Intralinks Designer Options** screen appears.
2. On the **General** tab, mark the **Show a specific exchange on start of Intralinks Designer** option, then select the workspace you want from the list that appears below the option.
3. Click **OK**.

## Ending your current Intralinks Designer session

### ► To exit Intralinks Designer

1. To exit Intralinks Designer, click the red and white close box icon  in the upper right corner of the screen.

2. One or more messages may appear:
  - A message appears asking whether you want to log out of Intralinks Designer. If you select **No**, you can restart Intralinks Designer quickly by right-clicking the Intralinks icon in the Windows taskbar notification area (System Tray) and selecting **Open Intralinks Designer** from the menu that appears. If you select **Yes**, you will have to log in again when you restart Intralinks Designer. You may wish to log out if other people have access to your computer.

If changes are being uploaded when you log out of Intralinks Designer, the upload will be halted but will resume the next time you log into Intralinks Designer. (If you exit Intralinks Designer but do not log out, the **Exchange Updater** window remains open and the upload process continues until it is completed.)

- If you have made changes in Intralinks Designer that have not been updated or saved, a message appears asking whether you want to save your changes. Click **Yes** to save your changes, or **No** if you want to leave the workspace as it was before you began making changes in Intralinks Designer.

If you save changes but did not update your workspace, a message will appear the next time you select this workspace using Intralinks Designer, asking whether you want to view the saved changes or a copy of the current version of the workspace on the Intralinks primary service.

## Checking for updates to Intralinks Designer

If your organization's policies allow you to install software yourself, you can use Intralinks Designer's **Check for Updates** command to be sure that you have the latest version of the Intralinks Designer application. If the **Check for Updates** command is not available, contact your organization's IT department for assistance.

### ► To check for updates to Intralinks Designer

Your computer must be connected to the Internet in order to check for updates.

**Note:** If an update is available and you choose to install it, both Intralinks Designer and Intralinks Courier must 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.

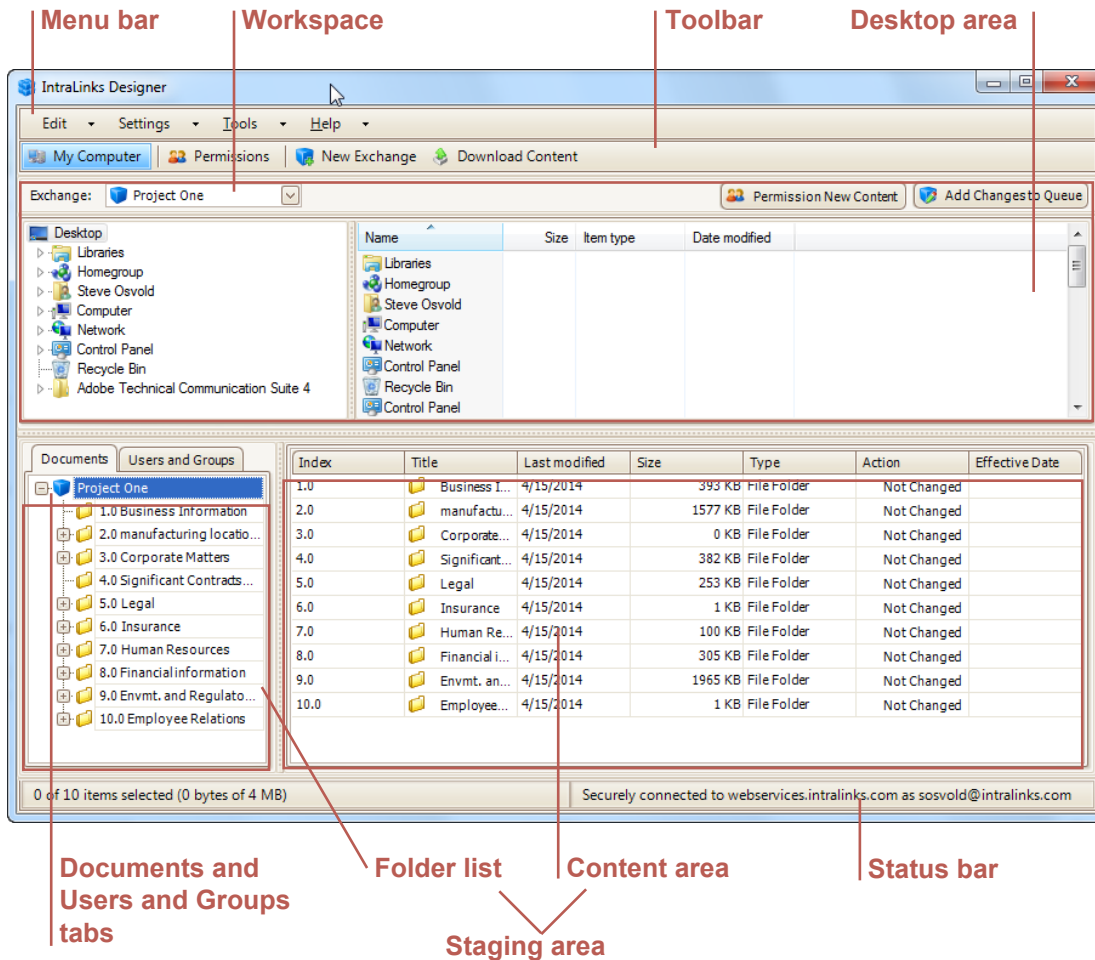
## Getting to know the Intralinks Designer interface

Read this section to become acquainted with the screens within Intralinks Designer and the navigation tools that are available to you.

We recommend that you become familiar with the information in this chapter before reading further, since later chapters in this manual refer to components described here.

### The Intralinks Designer screen

The Intralinks Designer screen contains a number of elements, as shown below:



*Intralinks Designer screen elements*

The IntraLinks Designer screen contains two primary work areas, the *desktop area* and the *staging area*.

The *desktop area* displays the contents of your local and network drives. The desktop area appears in the top half of the IntraLinks Designer window when the **Documents** tab is selected on the left side of the screen. This area can be hidden and redisplayed by clicking the **My Computer** button on the toolbar.

**Note:** You can drag files and folders from the desktop area, but you generally cannot make changes in the desktop area that will affect the contents of your computer; for example, you cannot move or delete files on your computer using IntraLinks Designer. You *can* view and rename PDF files that appear in the desktop, however. The changes you make in the staging area will affect your workspace when they are uploaded, but the original files will not be changed in any way.

The *staging area* displays the contents of the selected workspace, or the users on the workspace, along with any changes made since the workspace was last updated. Click the **Documents** and **Users and Groups** tabs on the left side of the screen to change from the Documents view to the Users and Groups view, and back again.

You can resize both the desktop and staging areas by dragging the mouse pointer over the section borders until the pointer becomes a double-headed arrow (<-->), and then continuing to hold the left mouse button as you drag the selected area to the desired size. You can resize the folder lists and content areas within the desktop and staging areas in the same way.

### Viewing documents

When the **Documents** tab on the left side of the screen is selected, the staging area has two sections: the *folder list* and the *content area*. The folder list, on the left below the tab, displays the hierarchy of folders, and their contents when expanded. The content area, on the right, lists the contents of the folder selected in the folder list and displays information about each item in the folder, including the last action performed on each item.

### Viewing users

When the **Users and Groups** tab is selected, the staging area has two sections: the *workspace groups list* and the *users list*. The workspace groups list, on the left below the tab, displays all the user groups that have been added to the workspace. The users list, on the right, lists the members of each group. Each user's name, organization, phone, email address, status (active or inactive) and workspace role is displayed, along with the date on which the person last accessed the workspace, and information about any changes that have been made to the person's record using Intralinks Designer.

## The toolbar

The Intralinks Designer toolbar, located between the menu bar and the desktop area, provides quick access to a number of key tasks. You can use these toolbar buttons to permission documents, add users and groups and export information, for example. The buttons that appear on the toolbar reflect the area in which you are working; as you move between the Users and Groups view to the Documents view, for example, the buttons change to reflect the tasks that you can perform in each area.

The **Exchange** drop-down list displays the workspaces whose content you can modify. The name of the open workspace appears in the list.

## The menu bar

At the top of the Intralinks Designer screen, above the desktop area, is the *menu bar*. It provides access to a variety of functions.


## Right-click menus

When you right-click publications, folders, workspace icons (including the workspace icon in the folder list), users or groups, a menu appears. The menu contains all of the most commonly performed tasks for the object that you clicked on. For example, if you right-click a publication, the following options appear on the menu: **Permissions**, **Copy**, **Delete**, **Rename** and **Download All Files**.

## The status bar

You can check the status of your connection on the *status bar* below the content area.

## Using the Intralinks Connection icon

The Intralinks Connection icon  appears in the Windows taskbar notification area (the System Tray) in the lower right corner of your computer screen when you start Intralinks Designer. If you exit Intralinks Designer but remain logged into the application, you can quickly restart the application using this icon. The icon provides easy access to other options, as well.

Right-click the icon to display the following options when you are logged into Intralinks Designer. If you are not logged in, fewer options are displayed.

- **Open Intralinks Designer:** Displays the Intralinks Designer main window.
- **View Exchange Update Queue:** Displays the **Exchange Updater** window, showing you the progress of any updates that are underway.
- **Open Download Wizard:** Displays Intralinks Download Wizard. This tool enables you to download the contents of one or more workspaces.
- **Open Reports Folder:** Displays the folder containing update and error reports, as well as any reports that you have created using the Upload Comparison Tool.
- **Intralinks Designer Options:** Displays a window that can be used to customize Intralinks Designer's behavior to meet your needs.
- **Send Error Log:** Opens email message addressed to Intralinks support with Intralinks Designer error log attached.
- **Log Out:** Ends your current Intralinks Designer session, but maintains a connection to Intralinks so that you can quickly log in again.
- **Exit Intralinks Designer:** Ends your current Intralinks Designer session and closes the connection.

# Chapter 3: Managing documents

## Overview

Read this chapter for information about:

- Creating folders and publications
- Adding content to your workspace
- Using indexed and unindexed folders
- Replacing existing documents with a newer version
- Comparing the contents of your workspace with the contents of a folder on your computer or network drive
- Setting permissions for publications
- Reorganizing information
- Freezing and unfreezing the contents of your workspace
- Previewing your changes

## Creating folders and publications

### Indexing folders and their contents

You can index folders and their contents to organize the contents of your workspace and to make the contents easy to locate later on.

When you index a folder, an index number is assigned to it automatically based on the folder's location in the folder list. Only folders at the top level of the workspace can be indexed. All the contents of an indexed folder are indexed; likewise, all the contents of an unindexed folder are unindexed.

You cannot edit index numbers directly; however, as long as the workspace is not frozen, you can rearrange indexed folders and documents, and the items' index numbers will be updated to reflect the items' new location. Unindexed items appear in the locations you selected for them when staging the workspace.

Indexing is an optional feature, and your workspace may not use it. By default, new folders on indexed workspaces are indexed, but you can mark a folder as unindexed if you like. In order for you to index folders and their contents, the **indexing** workspace setting must be marked (on) for the workspace.

You can freeze your workspace to prevent changes to the index structure you have created.

Subfolders and publications are assigned the index number of their parent folder, and an additional decimal place is added based on the subfolders' and publications' position within the parent folder. If the parent folder is moved, both its index number and the index numbers of subfolders and publications within it are updated. Index numbers appear within braces { }. Index numbers are part of the item's name.

Your workspace can have a mixture of indexed and unindexed folders.

## Creating folders and publications

### ► To create a folder

Once the folder is created, you can drag documents to it. Or you can leave the folder empty and add documents to it after it has been uploaded to your workspace on the IntraLinks primary service.

Remember, you also can create folders in the staging area simply by dragging them from the desktop area to the location in the staging area where you want them to appear.

### ► To create a folder in the staging area

If you haven't already done so, select the workspace you want to modify. Be sure that the **Documents** tab is selected.

1. To create a top-level folder, right-click the workspace icon in the folder list on the left side of the screen.

To create a subfolder, right-click the folder where you want it to appear.

A menu appears.

2. Select **New Folder** from the menu. The **New Folder Name** dialog box appears.

3. Enter a folder name.

The maximum number of characters allowed in an IL5 folder name is 60. The folder name cannot contain the following characters: // \ < >

4. If you are creating a folder at the top level of the workspace, select a folder type, **Indexed** or **Unindexed**. (For subfolders, this option is dimmed.)

If you choose **Indexed**, an index number is created and displayed automatically for the folder. For more information, see "Indexing folders and their contents" on page 13.

5. Click **Create** to create the folder in the staging area.

### ► To create a publication

1. Right-click the folder where you want the publication to appear. A menu appears.

2. Select **New Publication** from the menu, and enter the publication name in the popup window that appears.

**Note:** The maximum number of characters allowed in a publication name is 150, which includes each character in the index number, if indexing is used. The publication name cannot contain the following characters: < > \ //

## Adding content to your workspace

Adding content from your computer or a network drive is as easy as dragging and dropping folders and files. Simply click on the items to select them, then hold down the left mouse button and drag the desired items from the desktop panel to

the staging area, or from one location in the staging area to another. Before you begin, be sure that the **Documents** tab is selected.

If you are updating your workspace with PDF documents, you can choose to view the content of the documents before you add them to the workspace. Right-click on the file and select **Preview** from the menu.

### ► To add content items to the staging area

1. Select the files or folders in the desktop area. To select multiple files and folders, press the **SHIFT** or **CTRL** key and click on the items you want.
2. Drag and drop your selections to the desired location in the staging area. If you do not drop the item to a specific location (for example, between two files), the item will appear at the bottom of the list of content items.

**If you added a single file to a folder in the staging area:** A publication is created in the folder and the file is placed inside the publication. The publication adopts the name of the added file. (You can also add a file to an existing publication.) No further steps are required.

**If you added multiple items to the staging area:** The **Intralinks Designer Options** window appears. Using this window, you can indicate how you want the following situations to be handled:

- A folder containing only files
- A folder containing both subfolders and files
- Multiple files only (no folders)

Complete the following steps to determine how the items will be added to your workspace.

3. Review the options, and then select the option that best suits your needs.  
To save your selection and apply it in the future to folders containing multiple content items, mark the **Use this setting everywhere** option.
4. If you are adding folders to the top level of a workspace that uses indexing, also indicate whether the folders should be indexed by selecting either the **Indexed** option or the **Unindexed** option. For more information about indexing, see “Indexing folders and their contents” on page 13.  
To save your selection and apply it in the future to folders added at the top level of the workspace, mark the **Use this setting everywhere** option.
5. Click **OK**. Publications are created for files that are added to the staging area from your desktop.

### ► To set conversion options for multiple IL5 workspaces

You can set options for several workspaces at the same time. To do this:

1. Select **Intralinks Designer Options** from the **Settings** menu. The **Intralinks Designer Settings** screen appears.
2. Click the **Intralinks 5** tab.
3. Select the first workspace for which you want to set the options.
4. Select the desired options for creating publications and indexing behavior.

To save your selection and apply it in the future to folders containing multiple content items, mark the **Use this setting everywhere** option.

5. Click **Apply** to save the options for the current workspace, and select another workspace to apply the options to.

You can reset default selections in this window by clicking **Restore defaults**.

6. When you have finished setting options for your workspaces, click **OK** to close the window.

### Identifying content as public or private

If the public/private setting is enabled on your workspace, each publication automatically is assigned “private” status when it is created in the staging area. “Private” status means that a publication and its contents is viewable only by users whose content preference declaration is “private.” The status is displayed in the **Declaration** column in the content area.

You can change the value to “public” before you update the workspace.

#### ► To make publications public or private

1. In the content area of the screen, highlight the publication or publications and right-click. A menu appears.
2. Select **Edit Publication Settings** from the menu. The **Settings** screen appears.
3. In the **Declaration** field, select either **Public** or **Private**.
4. Click **OK**.

You can change the “public” setting back to “private” by performing the same steps and selecting the **Private** option.

### Setting effective dates

If the **Effective Date** workspace setting is enabled on the workspace, an effective (“as of”) date can be established for the content of each publication on the workspace. An **Effective Date** column appears in the content area.

#### ► To set an effective date for one or more publications

1. In the content area of the screen, highlight the publication or publications and right-click. A menu appears.
2. Select **Edit Publication Settings** from the menu. The **Settings** screen appears.
3. In the **Effective Date** field, either type the date or click the arrow to display a calendar and select a date from it.
4. Click **OK**.

## Adding content to indexed and unindexed folders

When you add one or more items to an indexed folder, Intralinks Designer assigns an index number to each item, which appears in front of the name of the item. The number is based on the index number of the folder in which the item is placed.

Index numbers are assigned as follows:



- A folder added to an indexed folder is assigned an index number that has one more decimal place than the parent folder. For example, if the parent folder has the index number of 2, the first subfolder within it will have the index number 2.1.
- A publication added to a folder is assigned an index number with one more decimal place than the folder. For example, if a folder has the index number of 2.1, the first publication within the folder will have the index number 2.1.1.

**Note:** The indexing feature overrides the sort feature if this feature is used on the workspace.

For more information, see “Indexing folders and their contents” on page 13.

## Renaming documents and folders using an import file

You can update document and folder names using a Microsoft Excel worksheet. This function is particularly useful if you need to update many documents quickly.

You can export the metadata (document and folder names) for all the documents on your workspace, make changes to the metadata, and then import the updates. The export file will be a Microsoft Excel worksheet. In addition, during the import process, you will have the opportunity to display a sample file that explains some limitations to the import process and shows an example of a properly organized import file.

### ► To export document metadata

The **Documents** tab should be displayed.

1. Right-click the workspace that appears above the folder list on the left side of the screen. A menu appears.
2. Select **Export Document & Folder Updates**. (This option is near the bottom of the menu; you may need to scroll the menu to display it.) A **Save As** dialog box appears.
3. Select a location for the file and enter a name for it, then click **Save**.

### ► To import metadata changes

The **Documents** tab should be displayed.

1. Right-click the workspace that appears above the folder list on the left side of the screen. A menu appears.
2. Select **Import Document & Folder Updates**. (This option is near the bottom of the menu; you may need to scroll the menu to display it.) The **Content Import** screen appears.

If you need to create an import file, continue to step 3. If you have created your import file already, skip to step 7.

3. If you have not created an import file containing information about the documents that you are updating, click the **download** link to open a sample file that you can review and modify. The sample file will be opened in Microsoft Excel.
4. The **Instructions** tab of the file is displayed. Read the instructions carefully before continuing.

5. Click the **Document List** tab to view an example of how your import file should be set up. Note that the columns that appear in the sample must appear in your import file, and additional columns cannot be added.
6. Create your import file.
7. When your import file is complete and you are ready to begin the import process, click the **Attach** link. An **Open** dialog box appears; use it to locate your import file and click **Open**. The import process will begin.  
  
If an error prevents the import from being completed, a message will appear advising you to view the error log. An additional message will appear on the screen indicating that errors have occurred. Click the **download** link within this message to see the contents of your file, along with information about the errors that occurred. Correct these errors in your import file and then repeat the import process.
8. When the progress indicator disappears from the screen, click the **Finish Import** button. A message appears to confirm that the import was successful.

Be sure to upload your changes to IntraLinks Platform to complete the import process. For instructions on uploading changes, see Chapter 5, *Queuing and uploading your changes to the IntraLinks primary service*, on page 40.

## Comparing the contents of your computer with your IntraLinks workspace

The Upload Comparison Tool allows you to compare the contents of a folder on your computer or a network drive with the contents of the workspace that you have selected for staging.

**Note:** Your workspace on the IntraLinks primary service will be used for comparison purposes — not the copy of your workspace that appears in IntraLinks Designer.

You can choose to compare all the contents of the workspace, or a specific folder and its contents (including subfolders) on the workspace.

### ► To compare the contents of a local folder with your IntraLinks workspace

1. From the **Tools** menu, select **Upload Comparison Tool**; in the menu that appears, select **Run**. The **Upload Comparison Report** screen appears.
2. Click the **Browse** button that appears next to the **Select a local folder to compare** field. The Browse for Folder screen appears.
3. Locate the folder that you want and highlight it.
4. Click **OK**. The **Upload Comparison Report** screen reappears.
5. The contents of your workspace appears on the right side of the screen. Locate the folder that you want to compare and highlight it. Or highlight the workspace itself if you want to include all the contents of the workspace in the comparison.
6. In the **Include on Report** field, select one of the following options:
  - **Complete list** — All contents of the selected folders will be included on the report

- **Changes only** — Only the differences between the local folder and the selected folder or workspace on the Intralinks primary service will be included on the report.
7. Click **Generate Report**.
  8. A message appears to alert you that the report has been created and saved in Intralinks Designer's Reports folder.
  9. To view the report, right-click the Intralinks Connection icon in the Windows taskbar notification area in the lower right corner of your computer screen. From the menu that appears, select **Open Reports Folder**. The contents of the Reports folder are displayed.
  10. Locate the report (it may be easiest to sort the contents of the Reports folder using the **Date Modified** column, then look for the most recently added report), and double-click it to open it.

## Setting permissions for publications

You can set permissions either for selected publications or for all new publications being added to the workspace. You also can set permissions for selected groups.

If you prefer not to set permissions for new content while staging the workspace, you will have the opportunity to do so again when you queue your changes for uploading to the Intralinks primary service.

**Important!** If you choose to set permissions for content that has been permissioned already, the existing permissions are removed. Use care when setting permissions for content that already exists on the Intralinks primary service.

### ► To set the same permissions for publications

Be sure that the **Documents** tab is selected.

1. If you want to set permissions for a single file, right-click the file or folder and select **Permissions** from the menu that appears.
 

To select multiple documents or folders, press the SHIFT or CTRL key while clicking on them. When you have made your selections, right-click and select **Permissions** from the menu that appears.

If you want to assign the same permissions to all newly added publications, select **Set Permission to Created Content** from the menu. The **Set Permissions** screen appears, displaying a list of all the groups that were created for this workspace.
2. For each group that will be allowed to view the selected items, mark the **See** option. If you do not want particular groups to see these items, be sure that the **See** option is unmarked.
 

Mark or unmark the box that appears *above* the **See** column to give or remove permission to all the groups on the workspace.
3. Determine whether the groups will be able to control the publications. Do this by marking the **Control** option next to the name of each group that will have this permission. Members of these groups will be able to modify the publications only if their workspace roles (for example, manager or publisher) allow them to do so.

Document control allows users to change other users' permissions to the document, update the document or delete it.

Mark or unmark the box that appears *above* the **Control** column to give or remove permission to all the groups on the workspace.

4. When you have finished setting permissions for all groups, click **Apply**.

## About document protections

The permissions that you assign to documents determine who is allowed to access those documents on your workspace. Document protections provide additional security for PDF and Microsoft Office documents, allowing you to limit the actions that users can take with the documents that they have permission to access.

Although different tools are used to protect PDF and Microsoft Office documents, the process for protecting these documents is the same.

In order for you to apply protection to documents, the workspace option **enable PDF and Microsoft Office protection** must be selected on the settings screen for your workspace.

For each document, select one of the following protection options:

- **Do not protect** – Choose this option if selected users are allowed to print the document and to view downloaded copies of the document without entering their Intralinks credentials.
- **Protect** – Choose this option to limit users' ability to share the document with others.

The way protection is provided depends upon the type of document being viewed, as well as the type of browser used to access the workspace.

**For PDFs accessed using Internet Explorer** — Documents must be viewed on the workspace. They cannot be downloaded.

**For PDFs accessed using Firefox** — If the user's browser settings include a default location for downloaded files, the user can download documents, but the user who downloaded it will be required to enter his or her email address and password in order to open the document. If no default location is specified, the user must view PDFs on the workspace.

**For Microsoft Office documents accessed using any browser** — An opened document may be downloaded, but the user who downloaded it will be required to enter his or her email address and password in order to open the document.

- **Protect and prevent print** – Choose this option if the selected users are not allowed to print the document or open a downloaded copy of the document without first entering their credentials.

Note that if you select **Protect**, viewers will be able to print the document and share the printed copy with others. If the document is particularly sensitive, consider the **Protect and prevent print** option, which provides a higher level of security.

Users will need either to install browser plug-ins or to use Intralinks Viewer in order to view protected documents. If some of your users belong to organizations that do not allow them to install browser plug-ins or if they use Macintosh computers, consider enabling Intralinks Viewer for your workspace. (The browser plug-ins are not supported by Macintosh.) Alternatively, you can add an unprotected version of the documents for these users.

## Reorganizing workspace content

You can reorganize the new and existing workspace content in the staging area. You can move or copy content from one location to another. You can also delete newly added and existing content.

While reorganizing workspace content, you can hide the desktop area of the main window by clicking the **My Computer** button on the toolbar.

## Renaming content items

You can rename files on your desktop before adding them to the staging area. If the workspace is not frozen, you can rename any content item in the staging area after adding it. When renaming items, you should be aware of the limits to the number of characters in the item's name, as well as characters that are not allowed in content items' names. (See the following tables.) A message will appear if you enter a name that is too long or contains characters that are not allowed.

Item	Character limit	Characters not allowed
Folder	60	< > \ //
Publication	150	< > \ //
Attachment	255	# \ / : * ? " < >

### ► To rename an item

1. Right-click the item. A menu appears.
2. Select **Rename**. The item's name is highlighted.
3. Type the new name for the item.

**Note:** After you add a file or folder to the staging area, *do not* rename this item on your desktop before you upload your changes to the Intralinks primary service. If you do so, an error will occur during the update process.

## Moving staged content

You can move content items from one location to another within the staging area by using the drag/drop method. Dragging and dropping the item to a new location removes the item from its previous location.

If you move items to an indexed location, they acquire the index numbering scheme assigned to the new location. As your cursor hovers over the new location, an infotip displays the new index number for the item. When you move indexed items to an unindexed location, the index numbering scheme is removed from the item names.

If you move an item (folder, publication attachment) to a location that already contains a like item with the same name, a copy number is added to the item's name in its new location.

**Example:** A folder named **October 2011 Status Reports** is moved to the **2012 Status Reports** folder, which already contains a folder with the same name. Therefore, the name of the newly added folder becomes **October 2011 Status Reports (2)**.

## Copying staged content

You can copy one or more content items from one location to another within the staging area.

- ◇ Highlight the items and select **Copy** from the **Edit** menu. Then click on the target location and select **Paste** from the **Edit** menu.

The items are copied to the target location.

## Deleting staged content

You can delete any of the content items displayed in the staging area if the workspace is unfrozen. This includes content that existed on the Intralinks primary service at the start of your Intralinks Designer session if the workspace is not in the open phase.

When you delete an item, the contents of the item are also deleted. For example, if you delete a folder, its contents are deleted.

### ▶ To delete one or more items

1. Select the item(s) to be deleted and right-click. A menu appears.
2. Select **Delete** from the menu.

If you delete indexed items, the numbering scheme of the remaining items does not change until the staged content is uploaded to the Intralinks primary service.

## Restoring deleted content

If you change your mind about deleting items, you can restore them before updating the workspace on the Intralinks primary service.

### ▶ To restore items marked for deletion

- ◇ Right-click the items; a menu appears.
- ◇ Select **Undelete** from the menu.

## Saving a staged workspace

You can save a staged workspace without uploading it to the IntraLinks primary service.

**Note:** Do not make changes directly to the workspace using the IntraLinks primary service until you have uploaded the changes you have saved.

### ▶ To save a staged workspace

◇ Press CTRL+S.

If you select another workspace or exit IntraLinks Designer and you have not uploaded the changes that you have staged to the IntraLinks primary service, a message prompts you to save your changes. These changes are saved locally (that is, on your computer or a network drive). The next time you select the workspace in IntraLinks Designer, a message will ask you whether you want to continue working with the copy of the workspace that you saved previously or to make a new copy of the workspace content that currently exists on the IntraLinks primary service. If you choose to make a new copy of the workspace, the changes you made previously will be lost.

### Working offline


When you save a staged workspace without updating it to the IntraLinks primary service, the saved workspace is available to you even if you cannot connect to the Internet or the primary service. You can work offline and save any changes that you make. When your access to the Internet is restored or the IntraLinks primary service becomes available again, you can upload your changes to the primary service.

While you are working offline, a message appears in the message bar to remind you of this.

## Freezing and unfreezing workspaces

You can prevent yourself and others from reorganizing indexed content by *freezing* your workspace. Freezing workspaces ensures that the existing order of the workspace content is not disturbed.

### ▶ To freeze the workspace

1. Locate the workspace in the folder list on the left side of the staging area. It can be identified by a icon of a hand holding a white cube . Right-click on the workspace; a menu appears.

◇ Select **Freeze Exchange Items** from the menu.

### ▶ To unfreeze the workspace

You can unfreeze workspaces that you have frozen if you need to make changes to their content. A message informing you that a workspace is frozen is displayed at the top of the staging area.

◇ To unfreeze the workspace, click the link **To unfreeze, click here** in the message that appears at the top of the staging area.

## Previewing your changes

When you have finished making changes in the staging area, you can preview the staged workspace. The view can be printed or exported to a Microsoft Excel file. Content items marked for deletion appear dimmed on the report.

### ▶ To preview the workspace

1. Select **Table of Contents** from the **Tools** menu.

A separate window opens. It displays each item's index number (if indexing is used), a hierarchical list of the contents, and the action taken for each item.

2. (Optional.) Click the **Print** or **Export** button to print a copy of the Table of Contents or to export it to Microsoft Excel.

### ▶ To display additional information about the contents of your workspace

You can choose to view additional information. You also can display the size of each content item and the date it was updated by right-clicking in the column title bar. Also, if the effective date or public/private workspace setting is enabled, this information is displayed in the Table of Contents. This information can be printed or exported to a Microsoft Excel spreadsheet. To do this:

1. Right-click in any column heading in the Table of Contents to display additional options.
2. Click on the options that you want to include. A check mark (tick) appears next to each option that is selected.

The columns you selected appear on the screen.

### ▶ To hide items marked for deletion

You can hide items marked for deletion from view so that you can more clearly see the organization of your workspace. To do this:

- ◇ Unmark the **Show Items To Be Deleted** option on the **Tools** menu.

To redisplay the items, mark the **Show Items To Be Deleted** option again.



# Chapter 4: Managing workspace users

## Overview

Read this chapter for information about:

- Adding users to your workspace
- Adding user groups
- Copying user information from one workspace to another
- Importing and exporting user information

## Managing users on your workspace

Using Intralinks Designer, you can add, remove and make changes to users and groups as you stage your workspaces, then upload those changes to the Intralinks primary service.

In addition, information about users and groups can be imported and exported to Excel spreadsheets and text files in CSV (comma-separated values) format, enabling you to synchronize information between Intralinks and another “system of record,” such as Microsoft Outlook. You can use the import process to add and remove users’ records, as well as synchronize them with other systems.

You also can update user information across multiple workspaces.

Intralinks Designer has two views: **Documents** and **Users and Groups**. When performing the tasks in this chapter, be sure that the **Users and Groups** tab is selected.

## Adding a user

Use the following procedure to add a single user to your workspace. If you plan to add many users and their information is available in a Microsoft Excel spreadsheet or a comma-separated values (CSV) file, consider importing their information instead. For more information, see “Importing information about users to multiple workspaces” on page 36.

### ► To add a user

Be sure that the **Users and Groups** tab is selected.

1. Click the **New User** button on the toolbar. The **Add User** screen appears.
2. Enter the user’s email address and click **Search**. If the person was previously invited to join an Intralinks workspace, his or her name, phone number and organization are displayed.

If the person has never been invited to an Intralinks workspace, the fields remain blank and must be entered manually.

3. Select the user’s role on the workspace. For more information about roles, see Appendix B, *Users’ roles within a workspace*, on page 50.
4. Select a language for the user. If the user is given access to Intralinks Platform exchanges, those exchanges will be displayed in the language that

you selected here. IL5 workspaces are displayed in English regardless of your selection here.

5. If the person will be a key contact for the workspace, mark the **Key contact** option. Only users with a manager role or the Publisher Plus or Reviewer Plus role can be a key contact.
6. (Optional.) Add the person to one or more user groups. Note that all users other than managers must be assigned to a group in order to view documents on the workspace. Also note that users can belong to only one buyer group or collaboration group.

To add a user to a group, highlight the group in the **Available groups** list and click the arrow key to move it to the **Assigned groups** list.

7. If you wish to add information for another user, click **Add & continue**. If you have finished entering information for users, click **Add & close**.

## Adding a group

### ► To add a group

Be sure that the **Users and Groups** tab is selected.

1. Click the **New Group** button on the toolbar. The **Add Group** screen appears.
2. Enter a name for the group.
3. Select the group type. Depending upon how your workspace is set up, the following types may be available:
  - **Exchange groups** — Workspace groups are perhaps the most flexible type of user group for workspace management purposes; these groups are used solely to speed permissioning for documents and comments. Users can be added and removed from these groups at any time, can have any role and can belong to more than one organization. Users can be included in any number of workspace groups. These groups are purely a management tool; members don't gain any rights or responsibilities simply by being a member of the group.
  - **Collaboration groups** — This type of group is available only if the **collaboration group** workspace setting is marked (on). Collaboration groups can include members with any kind of workspace role; all the members of the group can see one another regardless of their workspace roles.
 

**Important!** All members of collaboration groups, including those with the role of Hidden Manager Plus, are visible to one another, regardless of their workspace roles. If a user with the role of Hidden Manager Plus is added to a collaboration group, that person is visible to all the other members of the group.
  - **Buyer groups** — This type of group is available only if the **buyer group** and **collaboration group** workspace settings are marked (on). Buyer groups can include only reviewers and previewers. All the members of each group are visible to one another. For this reason, be sure not to mix users from different organizations in a single buyer group.

If you want to add a note describing the group, do so. This will appear in the description field on the participants & group management screen.

4. If you wish to add information for another group, click **Add & continue**. If you have finished entering information for groups, click **Add & close**.

## Importing group information

If you want to add many new workspace or collaboration groups at once, you can do so by importing the information needed to create them. You use either a Microsoft Excel spreadsheet or a text file in comma-separated value (.csv) format as your import file.

If you also plan to import information about the users who will belong to these groups, you can skip this process and add the groups when you add the users. For more information, see the next section, "Importing information about users" on page 29.

### About your import file

As noted earlier, your import file can be either a Microsoft Excel spreadsheet (.xls format) or a text file in comma-separated value (.csv) format.

The import file *must* contain the following values for each group:

- Group name
- Group type

Enter one of the following:

**Workspace**  
**Buyer**

(Note that you can use only the group types that have been enabled on your workspace.)

In addition, you can import the following optional information:

- Group ID (if the group has an ID number that in addition to its name)
- A descriptive note about the group
- Indication whether the group is allowed to search document contents

Enter **Y** or **Yes** if the group is allowed to perform full-text searches on documents; enter **N** or **No** if full-text searches are not allowed for this particular group. If you do not indicate whether groups are allowed to perform detailed searches of document contents, they will not be given this capability. Regardless of your entry, group members will be able to search for document and folder titles.

### Examples of an import file in Excel and CSV format

Your import file might appear like this if it was created in Microsoft Excel:

Group name	Group ID	Group type	Group description	Allow search
Legal Team		Workspace		Y
Buyer Group 1		Buyer		Y
Buyer Group 2		Buyer		N
Buyer Group 3		Buyer		Y
Lifton Associates		Workspace	Review team for our project	Y

The same information would appear like this in CSV format:

```
Group name,Group ID,Group type,Group description,Allow search
Legal Team,,Workspace,,Y
Buyer Group 1,,Buyer,,Y
Buyer Group 2,,Buyer,,N
Buyer Group 3,,Buyer,,Y
Litton Associates,,Workspace,Review team for our project,Y
```

### ► To add groups using the import process

Use this procedure to update a single workspace.

For this procedure, your import file should contain information for the groups that you want to add to the workspace.

Be sure that the workspace you want to update is displayed and that the **Users and Groups** tab is selected.

1. Click the **Import Groups** button on the toolbar. The **Add Groups Wizard** screen appears.
2. Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
3. Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
4. The Add Groups Wizard automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches are incorrect, click on the field in the **Import field** column and select the correct field from the list that appears.
5. When you have made any corrections needed, click **Next** to display step **3. Review Groups**.
6. Review the entries that appear on the screen. If any corrections are needed, click on the fields that need to be changed and make the corrections.

If a red “x” icon (❌) appears to the left of the group’s name, changes *must* be made to the record before it can be imported. To learn more about the change that is required, place your mouse pointer over the icon.

7. When you are satisfied with the entries, click **Accept**.

The groups’ information appears in the staging area within Intralinks Designer. If you need to make any additional changes to individual group records, highlight a group’s name and select **Edit** from the **Actions** menu. To remove a group, highlight the group’s name in the staging area and select **Delete** from the **Actions** menu.

If you want to view a list of the changes that were made to the workspace when you have finished importing, see “Viewing a report of the changes made during importing” on page 39.

## Importing information about users

If the information you keep about the people who use your workspace is more up to date in another software system, you can import the information from that system into Intralinks. To do so, you must be able to create a file containing the users’ information; this file can be either a Microsoft Excel spreadsheet or a text file in comma-separated value (.csv) format. Most applications can create files in one or both of these formats.

Using the import process, you can:

- Add users
- Remove users
- Synchronize users’ group memberships and workspace roles, and indicate whether they are a key contact for the workspace(s) being updated

Before you begin, use the **User Manager Settings** screen to set the default entries that will be used during the import process. For more information about the selections on the **User Manager Settings** screen, see “To set default import entries” on page 32.

These settings will be used if your import file does not contain information for individual users; for example, you can set a default workspace role; all users who do not have a role assigned to them in your import file will be assigned the default role. They also can be used to prevent users from particular Internet domains or with particular workspace roles from being removed, and to add or remove user groups.

### About your import file

As noted earlier, your import file can be either a Microsoft Excel spreadsheet (.xls format) or a text file in comma-separated value (.csv) format.

Keep in mind that users may be participants in both IL5 workspaces and Intralinks Platform exchanges. Some import options are used only if the users access Intralinks Platform exchanges; those options are noted below.

Symbols and special characters are not allowed in some fields that you will be importing. Those characters are noted below. You can have these characters removed or replaced with an allowed character if you like; for more information, see “To set default import entries” on page 32.

The import file *must* contain the following values for each user:

- First name

Do not use the following characters when importing names:  
/ @ ~ % + : { } ( ) [ ] < > | ' , " \ ;

- Last name

Do not use the following characters when importing names:

/ @ ~ % + : { } ( ) [ ] < > | ' , " \ ;

- Organization name

Do not use the following characters when importing organization names:

/ @ ~ % + : { } ( ) [ ] < > | ' , " \ ;

- Phone number
- Email address

**Note:** In Intralinks Designer, you cannot create two placeholder users whose required information (first name, last name, organization and phone number) is identical. If you attempt to synchronize two placeholder users with identical information, only one of the user records will be updated.

Do not use the following characters when importing email addresses:

" ( ) < > [ ] , ; { } : | \ / ` ^ ' ?

Also do not use blank space characters or characters with accents or other diacritical marks (for example, ç é ä).

- Workspace name (if importing to multiple workspaces)
- Workspace ID (if importing to multiple workspaces)

Both the workspace name and workspace ID are needed if you are importing information to multiple workspaces. A workspace ID and name is required for each record that will be added, changed or removed; if the same individual appears in multiple workspaces, your import file will need to include a separate entry for each workspace. The workspace name and workspace ID fields are *not* required if you are importing information within a single workspace.

In addition, you can import the following optional information:

- Workspace role

If you do not specify a role for a new user, the default role you selected on the **User Manager Settings** screen is assigned to the user. The selections on the **User Manager Settings** screen are described further on page 32.

When creating your import files, you can use any of the following text strings for your users' workspace roles:

```
reviewer
previewer
publisher
manager ltd
manager
reviewer+
publisher+
(manager+)
manager+
REVIEWER
PREVIEWER
PUBLISHER
```

MANAGER\_LTD  
 MANAGER  
 REVIEWER\_PLUS  
 PUBLISHER\_PLUS  
 HIDDEN\_MANAGER\_PLUS  
 MANAGER\_PLUS

- Key contact

Enter Y or Yes if the user is a key contact for the workspace; enter N or No if the user is not a key contact. Users with the following roles can be designated as key contacts: Manager Plus, Manager, Manager Limited, Publisher Plus, Reviewer Plus.

- Group ID (if you are adding the user to an existing group)
- Group name

You can add groups while importing. Simply add the new group names to your import file, then mark the **Create groups that do not already exist** option on the **User Manager Settings** screen.

Do not use the following characters when importing group names:

< > \

- Group type

Enter a group type if you are adding the user to a group that has not been created on the workspace yet. Enter one of the following:

**Workspace**  
**Buyer**

### *Updating information for users who already are using Intralinks*

If a user is already registered in Intralinks, the only settings that can be changed through the import process are:

- Key contact setting
- Group name
- Workspace role

### *Examples of an import file in Excel and CSV format*

Your import file might appear like this if it was created in Microsoft Excel:

Last name	First name	Organization	Phone	Email	Role	Key contact
Lee	Kim	Intralinks	212-555-0000	klee@company.com	reviewer	N
Smith	David	Intralinks	212-555-0000	dsmith@company.com	reviewer	N

The same information would appear like this in CSV format:

```
Last name,First name,Organization,Phone,Email,Role,Key contact
Lee, Kim, Intralinks, 212-555-0000, klee@company.com, reviewer, N
Smith, David, Intralinks, 212-555-0000, dsmith@company.com, reviewer, N
```

## ► To set default import entries

Be sure that the **Users and Groups** tab is selected.

1. From the **Settings** menu, select **User Manager Settings**. The **Processing Options** view of the **User Manager Settings** screen appears.
2. (Optional.) Click the **Unsupported Character Settings** tab. In the pane that appears, indicate how you want symbols and other characters that cannot be used in user records to be handled. The characters that cannot be used are displayed.

Mark the **Replace or Remove Unsupported Characters** option. Intralinks Designer provides a default replacement character for first and last names, organization names, group names and telephone numbers. You can enter another character if you like, or mark the **Remove Unsupported Characters** option if you want the unsupported characters to be removed altogether.

You are not required to have unsupported characters replaced or removed automatically. If you wish to view and correct each error manually, leave the **Replace or Remove Unsupported Characters** option unmarked. You may find that manually correcting these errors is time consuming and tedious, however.

3. Click the **User Options** tab, and enter default options for processing users and groups:

Select a role from the **Role to use if none is specified** list. As the name suggests, the role you select will be used whenever your import file does not contain a role for particular users.

Select a default language for users. This should be the language used by the majority of users. Users who prefer to use another language will be able to select another option when they log into Intralinks Platform.

Mark the **Send alerts immediately when documents are uploaded** option if you want an email alert sent to the users who have permission to view the documents. If you leave this option unmarked, no alerts will be sent automatically for the documents.

4. Click the **Group Processing Options** tab, and enter default options for processing groups:

Mark the **Create groups that do not already exist** option if you want workspace groups to be created if they appear in your import file but not on your workspace. If you do not mark this option, users will not be assigned to any group, and they may not have access to any documents as a result.

Mark or unmark the **Remove groups if all members have been removed** option to indicate whether you want groups to remain on your workspace or be deleted if all their members are removed during an import. If you mark this option, you can apply your decision to specific kinds of groups (workspace, buyer and collaborator, depending upon your how your workspace was set up). Only the groups that you indicate will be removed.

5. Click the **Role Exclusion Options** tab, and enter default options for users who are added to your workspaces:

If you do not want the records for users who have a particular workspace role to be removed when you synchronize or remove records, you can exclude



them. For example, you might want to use this option to prevent workspace managers from being removed from your workspaces.

To exclude a role, highlight it in the **Available roles** list and click the arrow button to move it to the **Protected roles** list.

6. Click the **Domain Exclusion Options** tab, and enter default options for users who are added to your workspaces:

If you do not want user records for particular Internet domains to be removed during the import process, you can exclude them. Domains are Internet addresses associated with particular organizations, for example *company.com*.

To exclude a particular domain from imports, enter the domain in the **Domain to exclude** field and click the **Add** button. Repeat this step for all the domains that you want to exclude.

7. When you have made all of your selections, click **OK** to save your changes and close the screen.


### ► To add users using the import process

Use this procedure to update a single workspace. If you want to update multiple workspaces at the same time, see “Importing information about users to multiple workspaces” on page 36.

For this procedure, your import file should contain information for the users whom you want to add to the workspace.

Be sure that the workspace you want to update is displayed and that the **Users and Groups** tab is selected. Also be sure that you have set default import entries using the previous procedure.

1. Click the **Import Users** button on the toolbar. The **Add Users Wizard** screen appears.
2. Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
3. Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
4. The **Add Users Wizard** automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches are incorrect, click on the field in the **Import fields** column and select the correct field from the list that appears.
5. When you have made any corrections needed, click **Next** to display step **3. Review groups**.
6. Review the names of the groups and make any needed changes.
7. Click in the box to the right of each field to make an entry for that field. Entries are required for fields that are marked with an asterisk (\*).

**Note:** Depending upon your selections, additional fields may become available. A  icon appears to the left of the field name if additional fields are available. Click this icon to display the new fields.

8. Click **Save**. The **Add Users Wizard** screen reappears. Click **Next** to display step **4. Match results**.

- Review the entries that appear on the screen. If any corrections are needed, click on the fields that need to be changed and make the corrections.

If a red “x” icon (✖) appears to the left of the user’s name, changes *must* be made to the record before it can be imported. To learn more about the change that is required, place your mouse pointer over the icon.

- When you are satisfied with the entries, click **Accept**.

The users’ information appears in the staging area within Intralinks Designer. If you need to make any additional changes to individual user records, double-click a user’s name to display a screen where changes can be made. To remove a user, highlight the user’s name in the staging area and select **Delete** from the **Actions** menu.

When you are satisfied with your entries, upload them to your workspace using the instructions in Chapter 5, *Queuing and uploading your changes to the Intralinks primary service*, on page 40.


If you want to view a list of the changes that were made to the workspace when you have finished importing, see “Viewing a report of the changes made during importing” on page 39.

### ► To remove users using the import process

Use this procedure to update a single workspace. If you want to update multiple workspaces at the same time, see “Importing information about users to multiple workspaces” on page 36.

For this procedure, your import file should contain information for the users whom you want to *remove* from the workspace. The file must contain the following required fields: each user’s phone number; email address; first name; last name; and organization name. For information about setting up your import file, see “About your import file” on page 29.

Be sure that the workspace you want to update is displayed and that the **Users and Groups** tab is selected. Also be sure that you have set default import entries using the procedure “To set default import entries” on page 32.

- Locate the workspace in the folder list on the left side of the staging area. It can be identified by a blue cube icon . Right-click on the workspace; a menu appears.
- From the menu, select **Remove Users**. The **Remove Users Wizard** screen appears.
- Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
- Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
- The Remove Users Wizard automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches are incorrect, click on the field in the **Import fields** column and select the correct field from the list that appears.
- When you have made any corrections needed, click **Next** to display step **4. Match results**. (Step **3. Review groups** is skipped because it is not used in this procedure.)

7. Review the entries that appear on the screen. If any corrections are needed, click on the fields that need to be changed and make the corrections.

If a red “x” icon (❌) appears to the left of the user’s name, changes *must* be made to the record before it can be imported. To learn more about the change that is required, place your mouse pointer over the icon.

8. When you are satisfied with the entries, click **Accept**.

The users’ information appears in the staging area within Intralinks Designer.

To undo a deletion, highlight the user’s name in the staging area and right-click. A menu appears; select **Undo delete** from it.

When you are satisfied with your entries, upload them to your workspace using the instructions in Chapter 5, *Queuing and uploading your changes to the Intralinks primary service*, on page 40.

If you want to view a list of the changes that were made to the workspace when you have finished importing, see “Viewing a report of the changes made during importing” on page 39.


### ► To synchronize user records using the import process

Use this procedure to update the user records on your workspace with information from another “system of record.” Your import file should contain information for the users whose records you want to update. When you use the following procedure, users may be removed, as well as added to your workspace, along with any updates that are made to existing records.

Use this procedure to update a single workspace. If you want to update multiple workspaces at the same time, see “Importing information about users to multiple workspaces” on page 36.

Your import file must contain the following required fields: each user’s phone number; email address; first name; last name; and organization name. For information about setting up your import file, see “About your import file” on page 29.

Be sure that the workspace you want to update is displayed and that the **Users** tab is selected. Also be sure that you have set default import entries using the procedure “To set default import entries” on page 32.

1. Locate the workspace in the folder list on the left side of the staging area. It can be identified by a blue cube icon . Right-click on the workspace; a menu appears.
2. From the menu, select **Synchronize Users**. The **Synchronize Users Wizard** screen appears.
3. Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
4. Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
5. The Synchronize Users Wizard automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches

are incorrect, click on the field in the **Import fields** column and select the correct field from the list that appears.

6. When you have made any corrections needed, click **Next** to display step **4. Match results**. (Step **3. Review groups** is skipped because it is not used in this procedure.)
7. Review the entries that appear on the screen. If any corrections are needed, click on the fields that need to be changed and make the corrections.  
  
If a red “x” icon (✖) appears to the left of the user’s name, changes *must* be made to the record before it can be imported. To learn more about the change that is required, place your mouse pointer over the icon.
8. When you are satisfied with the entries, click **Accept**.

The users’ information appears in the staging area within Intralinks Designer. If you need to make any additional changes to individual user records, double-click a user’s name to display a screen where changes can be made. To remove a user, right-click the user’s name in the staging area and select **Delete** from the menu that appears.

When you are satisfied with your entries, upload them to your workspace using the instructions in Chapter 5, *Queuing and uploading your changes to the Intralinks primary service*, on page 40.

If you want to view a list of the changes that were made to the workspace when you have finished importing, see “Viewing a report of the changes made during importing” on page 39.

## Importing information about users to multiple workspaces

You can update user information in several workspaces at the same time if you like. The process is similar to that for importing information into a workspace, with a couple of important exceptions:

- Your import file must include the workspace ID and the workspace name for each record that will be changed; if the same individual appears in multiple workspaces, your import file will need to include a separate entry for each workspace.
- You will not have an opportunity to review your changes before they are added to the Intralinks Designer queue. ***For this reason, be very careful when updating multiple workspaces!*** If your import file contains errors that are not found before you import, it is likely that they will appear on your active workspaces.

To import information into multiple workspaces, you must display the workspace, as described in the following procedure. If a particular workspace is displayed when you import, only that workspace will be updated.

### ► To add users to multiple workspaces

For this procedure, your import file should contain information for the users whom you want to add to the workspaces.

Be sure that the **Users and Groups** tab is selected. Also be sure that you have set default import entries using the procedure “To set default import entries” on page 32.

1. If the workspace list is not displayed already, display it by selecting **All Items** from the **Exchange** menu.
2. Click the **New Users** button on the toolbar. The **Add Users Wizard** screen appears.
3. Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
4. Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
5. The Add Users Wizard automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches are incorrect, click on the field in the **Import fields** column and select the correct field from the list that appears.
6. When you have made any corrections needed, click **Next**. Step **3. Match results** appears.
7. If any of the records in your import file contains errors, they are identified with red "x" icon (✖), and the message **Sorry, we cannot complete this task** appears.

If this occurs, click the **Download Errors** button to display a report in Microsoft Excel that lists the records in your import file and the errors that need to be corrected. When you have made the corrections and saved your changes in Excel, click the start over link to return to step 1 of the wizard. Be sure to click the **Browse** button and reselect your import file to ensure that you are using the updated version of the file.

Click **Accept**. The **Exchange Updater** screen opens and the import process begins.

If you want to view a list of the changes that were made to the workspaces when you have finished importing, see "Viewing a report of the changes made during importing" on page 39.


### ► To remove users from multiple workspaces

For this procedure, your import file should contain information for the users whom you want to *remove* from the workspaces.

Be sure that the **Users and Groups** tab is selected. Also be sure that you have set default import entries using the procedure "To set default import entries" on page 32.

1. If the workspace list is not displayed already, display it by selecting **All Items** from the **Exchange** menu.
2. Click the **Remove Users** button on the toolbar. The **Remove Users Wizard** screen appears.
3. Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
4. Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
5. The **Remove Users Wizard** automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches

are incorrect, click on the field in the **Import fields** column and select the correct field from the list that appears.

6. When you have made any corrections needed, click **Next** to display step **3. Match results**.
7. Review the entries that appear on the screen. If any corrections are needed, click on the fields that need to be changed and make the corrections.  
  
If a red “x” icon (✖) appears to the left of the user’s name, changes *must* be made to the record before it can be imported. To learn more about the change that is required, place your mouse pointer over the icon.
8. When you are satisfied with the entries, click **Accept**.  
  
The users’ records are removed, and the workspaces are added to the Intralinks Designer queue, where they can be uploaded to the Intralinks primary service.
9. Right-click the Intralinks Connection icon  in the Taskbar Notification area and select **View Exchange Update Queue** from the menu that appears. The **Exchange Updater** window opens.
10. Click the **Submit** button to begin uploading the changes to your workspaces.


If you want to view a list of the changes that were made to the workspace when you have finished importing, see “Viewing a report of the changes made during importing” on page 39.

### ► **To synchronize user records on multiple workspaces**

Use this procedure to update the user records on your workspaces with information from another “system of record.” Your import file should contain information for the users whose records you want to update. When you use the following procedure, users may be removed, as well as added to your workspaces, along with any updates that are made to existing records.

Be sure that the **Users and Groups** tab is selected. Also be sure that you have set default import entries using the procedure “To set default import entries” on page 32.


1. If the workspace list is not displayed already, display it by selecting **All Items** from the **Exchange** menu.
2. Click the **Synchronize Users** button on the toolbar. The **Synchronize Users Wizard** screen appears.
3. Click the **Browse** button to display the **Open** dialog box. Locate your import file, highlight it and click **OK**.
4. Review the remaining entries on the screen, and make any changes that are needed. Then click **Next** to display step **2. Match import fields**.
5. The Synchronize Users Wizard automatically matches fields in your import file with fields in Intralinks. Review the automatic selections; if any of the matches are incorrect, click on the field in the **Import fields** column and select the correct field from the list that appears.
6. When you have made any corrections needed, click **Next** to display step **3. Match results**.

7. Review the entries that appear on the screen. If any corrections are needed, click on the fields that need to be changed and make the corrections.  
  
If a red “x” icon (✖) appears to the left of the user’s name, changes *must* be made to the record before it can be imported. To learn more about the change that is required, place your mouse pointer over the icon.
8. When you are satisfied with the entries, click **Accept**.  
  
The users’ information is updated, and the workspaces are added to the Intralinks Designer queue, where they can be uploaded to the Intralinks primary service.
9. Right-click the Intralinks Connection icon  in the Taskbar Notification area and select **View Exchange Update Queue** from the menu that appears. The **Exchange Updater** window opens.
10. Click the **Submit** button to begin uploading the changes to your workspaces.  
  
If you want to view a list of the changes that were made to the workspace when you have finished importing, see “Viewing a report of the changes made during importing” on page 39.

## Viewing a report of the changes made during importing

You can view an import log — a report in Microsoft Excel format — that lists all the changes made to your workspace when you import users or groups. Update logs are in .csv (comma-separated values) format; these files can be opened with Microsoft Excel and other applications.

### ► To view an import log

1. Right-click the Intralinks Connection icon  in the Taskbar Notification area. A menu of options appears.
2. Select **Open Reports Folder** from the menu. A dialog box opens, displaying log files for each import you have completed. Locate the file for the import that you wish to view.  
  
Log files are named using the following format: **Import Status - <Date> PM.csv**.
3. Double-click the log file to open it.

## Exporting information about users

You can export information about your workspace users to Microsoft Excel spreadsheets and text files in CSV (comma-separated values) format.

### ► To export information about users

Be sure that the **Users and Groups** tab is selected.

1. Click the **Export** button on the toolbar. A **Save As** dialog box appears.
2. Enter a name for the document. Then choose a location on your computer or a network drive for it, and click **OK**.



# Chapter 5: Queuing and uploading your changes to the Intralinks primary service

## Overview

Read this chapter for information about:

- Queuing your changes and setting permissions for documents or publications
- Queuing multiple workspaces
- Uploading your changes to the primary service
- Viewing details about your upload
- Viewing and fixing errors

## Queuing your changes

When you are ready to update the workspace to the Intralinks primary service, queue your changes. Once the changes have been queued, you can update your workspace immediately or at a later time.

### ► To queue a workspace and set permissions for documents

1. Click the **Add Changes to Queue** button on the toolbar.
2. If you have added documents to your workspace, a message appears asking whether you want to set permissions for them now. If you want to set permissions, click **Yes**.

If you do not want to set permissions for your documents, click **No** and go on to step 7.

3. The **Set Permissions** screen appears with the newly added documents displayed at the left and workspace groups listed to the right.

Mark or unmark the box that appears above the **Override** column to give or remove permissions for all the groups on the workspace.

4. For each group that will be allowed to view the documents, mark the **See** option next to the group's name.

Mark or unmark the box that appears *above* the **See** column to give or remove permission to view the documents to all the groups on the workspace.

5. Determine whether the groups will be able to control the documents. Do this by marking the **Control** option next to the name of each group that will have this permission. Members of these groups will be able to modify the document only if their workspace roles (for example, manager or publisher) allow them to do so.

Document control allows users to change other users' permissions to the document, update the document or delete it.

Mark or unmark the box that appears *above* the **Control** column to give or remove permission to all the groups on the workspace.



6. When you have finished setting permissions, click **Apply**.
7. The **Exchange Updater** window opens and the Intralinks Designer main window is refreshed. The workspace list appears, ready for you to select another workspace to modify. Workspaces that are queued are not accessible until processing is complete or they are removed from the queue.

The name of the workspace you selected for updating appears in the **Exchange Updater** window. If you previously queued other workspaces, the most recently queued workspace appears at the bottom of the queued workspace list; its status is “Staged.”

### ► **To convert Microsoft Word and PowerPoint files and graphic images to PDF format**

You can choose to have the Microsoft Word and PowerPoint documents and graphics files converted to PDF format during the upload process. The orientation (portrait or landscape) of each page in the original document will be used in the PDF that is created, and documents may have a combination of pages with portrait and landscape orientation.

If you choose this option, we recommend that you check the PDFs on your workspace to be sure that they were converted to your liking.

- ◇ Mark the **Convert Microsoft Word and PowerPoint documents** option and/or the **Convert images to PDF** option.

### ► **To alert users about workspace changes**

You may want the selected group to be automatically alerted that the workspace has been modified as soon as you upload it to the primary service (if the workspace is in the open phase). This option appears in the **Exchange Updater** window.

Users can set a preference to receive a single alert daily that consolidates all of the messages sent to them by Intralinks, or they can choose not to receive alerts from Intralinks at all. You have the option to override these preferences and send your alert immediately to all members of the selected group.


1. Select the **Send** option in the field that appears below the **Alerts** heading. The other fields in the Alerts section become available.
2. If you want to send the alert to all users immediately, mark the **Deliver immediately (override user preferences)** option.
3. If you want to change the text that will appear in the alert’s subject line, unmark the **Use default Subject text** option, and then enter the text you want in the field to the right.
4. If you want to add a note to the body of the alert, unmark the **Use default Message text** option, and then enter the text you want in the box to the right.

This summary alert will list the modified workspace content in the email to the users.

## Updating additional workspaces

After you have queued a workspace, you can return to the Intralinks Designer main window and select other workspaces that you want to modify. As you finish

working with each workspace, click the **Add Changes to Queue** button on the toolbar to add them to the queue in the **Exchange Updater** window.

You can return to the **Exchange Updater** window from the Intralinks Designer main window at any time to view the status of workspaces submitted for processing. You can switch between the Intralinks Designer main window and the **Exchange Updater** window by selecting the window you want from the Intralinks Connection menu. You can display this menu by right-clicking the Intralinks Connection icon  in the Taskbar Notification Area in the lower right corner of your computer screen.

When you are ready to update your workspaces on the Intralinks primary service, go on to the next section, "Uploading your changes."

## Uploading your changes

### ▶ To upload your changes to the Intralinks primary service

- ◇ Select the workspace and click the **Submit** button at the top of the **Exchange Updater** screen.

If the workspace is next in line for processing, the status changes from "Staged" to "Ready" and then to "Updating." When processing is completed, the status changes to "Completed."

You can click the **Submit** button for each queued workspace. Because only one workspace is processed at a time, the status for each "submitted" workspace changes to "Ready." When processing is complete or canceled for workspace, processing begins on the next workspace in the queue.

### ▶ If you decide not to continue to upload a workspace while it is being processed

- ◇ Click the **Cancel**  button.

You are prompted to confirm that you want to stop the upload process. When you click **Yes**, the status changes to "Cancelled." Any content that was processed before you clicked **Cancel** is uploaded to the workspace. The number of files that were processed, that may have failed during processing, and that are pending upload are displayed on the **Summary** tab. (See the next section, "Viewing workspace upload information.")

**Note:** You cannot resume processing after canceling the operation.

### ▶ To make changes to selections you made previously


While "submitted" workspaces are awaiting processing, you can make changes to the options you selected in the window. To do this:

1. Select the workspace and click the **Hold changes** button at the top of the window. The status changes to "Staged."
2. Make the desired changes to the selected options.

You can also reorder the workspaces that are "Staged" or "Ready" for processing. To do this, select and drag the workspace to another position in the queue.

### ► To delete staged changes

You can remove the workspaces listed on the **Exchange Updater** screen whose status is other than “Updating.” To do this:

- ◇ Select the workspace and click the **Delete**  button. The workspace is removed from the queue.

## Viewing workspace upload information

You can view information about the workspace that is currently being uploaded and about the workspaces that are awaiting processing.

As a workspace is being processed, the **Summary** tab displays the following information:

- The name of the file being uploaded.
- The overall progress of the upload, shown on a progress bar. The percentage of completion and the number of tasks completed also is shown. (A task is an action, such as “add,” “delete,” etc.)

You can view the same progress in more detail by clicking the **Details** tab. You can view the type of task being performed, the name of the content item being updated, its status, and the time its processing was completed. The **Step** column displays the order in which the content items were processed.

## Viewing upload errors

If errors occur during the upload process, the process doesn’t stop. To view the files that resulted in errors, click the workspace name and view the issues in the **Details** tab.

You can double-click the row containing the error to view a dialog box displaying more information about the error.

## Viewing the upload log file

You can click **Open log** in the upper right corner of the **Exchange Updater** window to view a Microsoft Excel spreadsheet that lists the results of the upload, including any errors that occurred during the upload process.

Upload errors may occur for the following reasons:


- The Intralinks primary service was not available at the time the upload was performed.
- The session was terminated because another user logged into Intralinks Designer.

## Viewing and fixing indexing errors

From time to time, the index numbers assigned to folders and publications can get out of sequence, or gaps in the numbers can occur. This can happen, for example, if an indexed publication is deleted on the Intralinks primary service.

When you select an IL5 workspace, its index numbers are examined; if any errors are found, a window appears listing the errors and how they were resolved by Intralinks Designer. You must click **Accept changes** to confirm the corrections made by Intralinks Designer before continuing. You can also save a copy of the list of indexing errors by clicking **Save log** and specifying a location for this report.

▶ **To access indexing error reports**

- ◇ Right-click the Intralinks Connection icon  in the Taskbar Notification area and select **Open Reports Folder** from the menu that appears.

# Chapter 6: Downloading information from your workspace

## Overview

Read this chapter for information about:

- Downloading folders, documents and attachments using the Download Wizard
- Setting the options that will be used when you download information

## Using the Download Wizard

You can use the IntraLinks Download Wizard to download multiple folders, documents and attachments at the same time. You can select folders and documents from your workspace and copy them to your computer or a network drive. Using the Download Wizard, you can download all the contents of one or more workspaces, the contents of selected folders, and individual files.

Note that some documents or attachments may have protections applied to them that will prevent you from downloading or printing them. You can view protected documents or attachments online only.

In order for you to download items from a workspace, the **Multi-file Download** option on the workspace's **settings** screen must be marked.

### ► To download documents using the Download Wizard

Be sure that the **Documents** tab is selected.

1. Select the **Download Content** button on the toolbar. The Download Wizard's **Select Items** view appears, displaying a list of the workspaces to which you have access.
2. Using the **Available** list, locate the items you want to download. Either double-click a workspace's name or click the plus-sign (+) icon to the left of it to view the contents of the workspace. You can view the contents of folders within the workspace in the same way.
3. When you have located an item (workspace, folder or document) that you want to download, highlight it and click the **Add** button. The individual documents that you selected appear in the **To be downloaded** list. Continue selecting items until you have selected all the items that you want to download.
4. Click **Next**. The **Locations & settings** view of the Wizard appears.
5. Select the location on your computer or network where the items will be downloaded. Also select options for organizing and processing files, along with advanced options. To learn more about download options, see the next section, "Options for downloading information using the Download Wizard."
6. Click **Next**. The **Download** view of the wizard appears.
7. Review your selections. Highlight a workspace to see all the documents that will be downloaded from it. Click the **Back** button to make changes.

8. Click the **Start** button to begin downloading the items to the selected location. As items are downloaded, information about them is displayed. You can halt the download if necessary by clicking the **Stop** button.
9. Once the items have been downloaded, you can choose to print the documents and view a download log, which shows detailed information about items you downloaded, including their title and extension, status (completed, failed to be downloaded, completed with warnings), the date and time each item was downloaded, their location on the workspace and on your computer or network, and error messages if the items could not be downloaded or was downloaded with a warning. (For example, the document's name was modified because another document with the same name already exists in the selected location.)

To print the documents, click **Print these documents**. The **Bulk Print Documents** window appears. Review the documents displayed; to remove a document from the list, highlight it and then click **Remove selected**. When you have finished reviewing the list, click **Print**.

To view the Download Log, click **Open Download Log**.

10. Click **Close**.

## Options for downloading information using the Download Wizard

When using the Download Wizard, you can select a number of options for downloading folders, attachments and documents.

### **Common options**

**Save download to** – Select the location on your computer or network where the items you selected will be downloaded.

### *File organization options*

You can choose whether the folders on your workspace will be recreated on your computer, or whether all the documents or attachments will be downloaded into a single folder.

**Retain folder structure of the exchange** – If you select this option, the folder organization used on your workspace will be recreated on your computer or network drive. This option is especially useful if you are downloading many files from multiple folders or the contents of entire workspaces.

Next make an additional selection to determine how publications will be handled:

- **Remove all publications** – Publications will be removed altogether, and attachments will appear in the folders that contained the publications on the workspace.
- **Replace all publications with folders** – Publications will be replaced by folders with the same name, and attachments associated with the publications will appear inside them.
- **Remove publications that contain only one attachment with the same name; Replace all other publications with folders** – A folder will be created only if a publication has multiple attachments associated with it. Otherwise the publication will be removed.

**Place all files in a single folder** – All the attachments you selected will appear in the location you selected. No subfolders will be created for them.

#### *Options for files with the same name*

Use these options to indicate what will happen when you download a file with the same name as a file that already exists in the download location.

**Do not download** – The file on the workspace is not downloaded, and the file that already exists in the download location is not changed in any way.

**Download and append suffix** – The file on the workspace is downloaded and the suffix (1) is added to the file's name; the suffix is incremented if the file has been downloaded previously. The file that already exists in the download location is not changed in any way.

**Prompt for response** – If you attempt to download a file with the same name as an existing file, a message appears asking you to decide whether to skip the file, download it but add a suffix to its name, or download it and overwrite (erase) the existing file.

**Overwrite** – The existing file is replaced by the file from the workspace.

#### *Advanced options*

**Add the exchange ID to the exchange folder name** – Mark this option if you want the workspace ID (a unique numeric identifier for each workspace) to be included in the folder name for each workspace.

**Add the date and time of the download to the exchange folder name** – Mark this option to include the date and time the content was downloaded to the folder name for each workspace.

**Enable concurrent downloads** – Mark this option to allow files from multiple workspaces to be downloaded at the same time.

**Download comments** – Mark this option if you want to download comments associated with IL5 publications. Also select one of the following options to determine how the comments will be downloaded:

- **Place comments in their own folder** – Folders with comment titles will be created, and individual responses will appear within these folders.
- **Keep comments with publications** – Responses will appear in the folder containing the publication they are associated with; no subfolder will be created for them.

**Use Index as file name prefix** – If the items being downloaded are indexed, mark this option to include the index number in the items' names. If this option is unmarked, index numbers are not downloaded.

#### *System error options*

Choose the action that you want to be taken when a file cannot be downloaded:

**Ignore the error and move to the next file** – If you mark this option, files that cannot be downloaded are skipped, and the rest of the files you requested are downloaded. Information about errors can be found in the Download Log.

**Stop the download** – If you mark this option and a file cannot be downloaded, the download process is stopped altogether.



# Appendix A: Menu and toolbar shortcuts

You can use the following keyboard shortcuts to speed your tasks in Intralinks Designer.

**Add to Queue:** CTRL+Q

**Copy:** CTRL+C

**Delete:** DELETE

**Exit Intralinks Designer:** ALT+F4

**Freeze Exchange Items:** CTRL+SHIFT+F

**Intralinks Designer Help:** F1

**Intralinks Designer Options:** CTRL+O

**New Folder:** CTRL+N

**New Group:** CTRL+G

**New Publication:** CTRL+SHIFT+P

**New User:** CTRL+P

**Paste:** CTRL+V

**Redo:** CTRL+Y

**Refresh Exchange List:** CTRL+R

**Rename:** F2

**Save:** CTRL+S

**Show Items To Be Deleted:** CTRL+SHIFT+D

**Table of Contents:** CTRL+T

**Undo:** CTRL+Z

## Appendix B: Users' roles within a workspace

*Workspace roles* determine each user's rights and responsibilities within a workspace. Users who are active in a number of workspaces may have a different role within each workspace.

Workspace roles give great flexibility in enabling users to work efficiently. Workspace roles keep users focused on the tasks that are assigned to them. Each organization chooses the workspace roles that will be available in their workspace. Intralinks offers a total of nine workspace roles, though in practice few workspaces will contain all nine of those roles; a successful workspace could function with only two or three workspace roles.

Workspace roles can be divided into three broad types: *managers*, *publishers* and *reviewers*.

**Managers** — Managers are responsible for setting up and maintaining the workspace, with assistance from Intralinks Global Enterprise Services. With a few exceptions, managers can perform all tasks within the workspace. They can publish documents, and they determine who has access to the workspace.

**Publishers** — Publishers assist managers by adding documents to the workspace. They may be responsible for setting permissions for the documents — that is, identifying the workspace users who are allowed to view, print and download each document. Publishers can see reviewers and other publishers. Publishers generally are from the organization that is hosting the workspace.

**Reviewers** — Reviewers are responsible for reading the documents that appear in the workspace. Reviewers generally can see and work with the people who were responsible for setting up the workspace, but they may not be able to see or work with one another.

### Manager workspace roles

Workspaces can have as many as four types of managers, though most workspaces use only one or two manager workspace roles. Managers can participate in all phases of the workspace's life cycle.

Manager roles include:

**Manager Plus** – This is the most powerful of all the workspace roles available in workspaces; users who are assigned this role are allowed to perform every task and to view all users on the workspace. This role is sometimes abbreviated as “manager +.” Most workspaces include users with this role.

**Hidden Manager Plus** – This workspace role is nearly identical to that of manager plus, but these managers will be hidden from users with publishing and reviewing workspace roles. That is, these managers' names will not appear in lists of users viewed by publishers and reviewers. (They will be visible to other managers, however.) Hidden managers should be careful about posting documents or comments because these items *will* reveal their names to publishers and reviewers. Users with this role also cannot be Q&A coordinators on Intralinks Platform workspaces that use Q&A. This role sometimes is abbreviated as “(manager+).”

**Manager** – This workspace role is similar to that of manager plus, with one exception: users with this role may be given permission to delete and modify documents and comments. This role is seldom used.

**Manager Limited** – This workspace role is similar to that of manager plus, with one exception: users with this role must be given permission to add, delete and modify comments and documents. In addition, users with this role cannot create or update user groups. This role sometimes is abbreviated as “manager ltd.” This role is seldom used.

## Publisher workspace roles

Workspaces can have up to two types of publishing workspace roles — though it is possible for a workspace not to have any members with publishing roles at all, since managers are able to perform all the tasks that are available to publishers. Publishers participate in the preparation and open phases of the workspace’s life cycle.

Publisher workspace roles include:

**Publisher Plus** – This workspace role is able to perform all tasks related to publishing and managing documents and comments. People with this role also can update user groups and workspaces settings for the footer and splash screen, and can change the workspace’s phase. People with this role can see all other users (except those with the hidden manager plus workspace role) and can be seen by all other users.

**Publisher** – People with this workspace role can post new documents and comments and can respond to the comments they have been given permission to see. These users may be given permission to modify or delete documents and comments. People with this role can see all other users (except those with the hidden manager plus role) and can be seen by all other users. This role is seldom used.

## Reviewer workspace roles

Workspaces can have up to three types of reviewer workspace roles. These roles include:

**Reviewer Plus** – In addition to reviewing documents, users with this workspace role are able to add and remove reviewers from the workspace and create user groups. This role is rarely used.

**Previewer** – People with this workspace role can view, print and download documents (subject to the restrictions set for each document). Previewers are active in the preparation and open stages of the workspace’s life cycle; they often are members of the organization hosting the workspace. Unless they are assigned to a collaboration group or a buyers group, previewers will not be able to see other reviewers or previewers taking part in the workspace.

**Reviewer** – People assigned this workspace role have the same rights as previewers, but are active only during the open phase of the workspace’s life cycle. Reviewers generally are members of organizations other than the organization hosting the workspace. In a typical workspace, most users will be reviewers. Unless they are assigned to a collaboration group or a buyers group, reviewers cannot see other reviewers or previewers taking part in the workspace.

# Index

## A

alerting users about changes 41

## B

bulk downloading 45

buyer groups

adding 26

defined 26

buyers, *see* reviewers

## C

changes

previewing 24

saving 23

viewing upload information 43

collaboration groups

adding 26

defined 26

content area, defined 11

conversion options

setting for multiple IL5 workspaces 15

CTRL keyboard shortcuts 49

customer support

sending error logs 12

## D

deleting changes 43

desktop area

defined 10

hiding 21

documents

copying 22

deleting 22

restoring deleted items 22

downloading 45

moving 21

renaming

PDF files

renaming 21

reorganizing 21

viewing 11

Download Wizard 45

displaying using Intralinks Connection 12

options 46

downloading documents 45

limitations 45

dragging and dropping folders and files 14

## E

effective dates

setting 16

error log

sending to Intralinks customer support 12

viewing 12, 43

errors 43

indexing

fixing 43

Exchange Updater screen 41, 42

displaying using Intralinks Connection 12

exiting Intralinks Designer 7

using Intralinks Connection 12

exporting user information 39

## F

files

adding a single file 15

adding from your computer 14

folder list, defined 11

folders

adding from your computer 14

comparing the contents of two folders 18

copying 22

creating 14

deleting 22

restoring deleted items 22

index numbers for 17

indexing 13

moving 21

renaming 21

reorganizing 21

rules for naming 14

freezing workspaces 23

function keys

shortcuts 49

## G

graphics

converting to PDF format 41

groups 27

adding 26

buyer groups

defined 26

collaboration groups

defined 26

importing 27, 28

viewing 11

workspace groups

defined 26

**H**

Hidden Manager Plus workspace role 50  
hiding deleted items 24

**I**

icons  
    on the toolbar 11  
IL5 workspaces  
    identifying 7  
importing  
    groups 27  
        import file requirements 27  
    import file requirements 27  
    to multiple workspaces 36  
    user information 29  
        import file requirements 29  
        removing or replacing unsupported  
            characters 32  
        setting default entries 32  
index numbers 13, 16  
    fixing errors 43  
indexing 13, 16  
indexing error reports 44  
Internet problems  
    working offline 23  
Intralinks Connection 12  
Intralinks Designer options 12  
Intralinks Designer window 9  
Intralinks Platform exchanges  
    identifying 7

**K**

keyboard shortcuts 49

**L**

launching Intralinks Designer 6  
    using Intralinks Connection 12  
logging in 6  
    using a proxy server 6  
logging out  
    using Intralinks Connection 12

**M**

Manager Limited workspace role 51  
Manager Plus workspace role 50  
Manager workspace role 51  
managers 50  
    workspace role 50  
menu bar, defined 11

menus  
    right-click menus 11  
Microsoft PowerPoint  
    converting to PDF format 41  
Microsoft Word  
    converting to PDF format 41

**N**

navigation tools 9

**O**

offline mode 7, 23  
options  
    for Download Wizard 46

**P**

password 6  
PDF documents  
    converting files in other formats to PDF  
        41  
    previewing 15  
permissions  
    control option 19, 40  
    default permissions for new documents  
        19  
    default permissions for new publications  
        19  
    setting 19, 40  
PowerPoint  
    converting to PDF format 41  
preferences 12  
    Download Wizard options 46  
Previewer workspace role 51  
previewers 51  
previewing changes 24  
proxy server 6  
public vs. private declarations 16  
    changing for publications public 16  
    making publications private 16  
publications  
    creating 14  
    index numbers for 17  
    making publications private 16  
    making publications public or private 16  
    public vs. private declarations 16  
    rules for naming 14  
Publisher workspace role 51  
publishers 51  
    workspace role 50  
PvP, see public vs. private declarations

**Q**

## Q&amp;A

- collaboration groups
  - defined 26

queuing changes 40

quitting Intralinks Designer 7

- using Intralinks Connection 12

**R**

remember me option 6

renaming content items 21

Reviewer Plus workspace role 51

Reviewer workspace role 51

reviewers 51

- workspace role 50

right-click menus 11

roles, *see* workspace roles *and* group member roles

**S**

saving (downloading) documents 45

saving changes 23

- working offline 23

shortcut keys 49

Show Computer View command 10, 21

staging area 15

- defined 10

- hiding deleted items 24

staging workspaces 13–24

starting Intralinks Designer 6

- using Intralinks Connection 12

submitting changes 42

- canceling 42

synchronizing user information with another system 35

**T**

Table of Contents

- displaying more information 24

toolbar 11

**U**

undoing changes 43

unfreezing workspaces 23

unsupported characters

- removing or replacing during import 32

updating Intralinks Designer 8

Upload Comparison Tool 12, 18

upload queue

- displaying using Intralinks Connection 12

uploading changes 42

- canceling 42

- viewing error logs 43

- viewing upload information 43

user groups

- adding 26

users

- adding 25

- adding to multiple exchanges 36

- alerting about changes 41

- exporting user information 39

- importing 29, 33

- import file requirements 29

- removing or replacing unsupported characters 32

- setting default entries 32

- removing 34

- removing from multiple exchanges 37

- synchronizing multiple exchanges 38

- synchronizing with another system 35

- updating

- by importing 31

- viewing 11

- workspace roles 50

Users and Groups view 11

users list 11

**W**

Word

- converting documents to PDF format 41

working offline 7, 23

workspace

- settings

- Download Wizard 45

workspace groups

- adding 26

- defined 26

workspace groups list 11

workspace roles

- importing 30

- manager roles 50

- publisher roles 51

- reviewer roles 50, 51

workspace users

- workspace roles 50

workspaces

- canceling an upload 42

- comparing with the contents of a local folder 18

- deleting staged changes 43

- freezing and unfreezing 23

- hiding deleted items 24

- identifying as Intralinks Platform or IL5 7

## IDs

- importing 30
- queuing changes 40
- saving 23
- staging 13–24
- uploading changes 42
- viewing upload error logs 43
- viewing upload information 43
- working offline 23