Intralinks Designer

User Guide

For Intralinks VDRPro Exchanges

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Chapter 1: Welcome

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

Using Intralinks Designer, you can:

- Create new exchanges

- Make changes to exchange settings

- Add new content from your local drives

- View and update existing exchange content

- Reorder exchange content items

- Delete content from the Intralinks exchange

- Set users' permissions to use documents

- Add, remove and synchronize user information with other databases

- Configure and manage custom fields for documents, as well as apply these fields to new and existing documents

When you have finished staging the exchange 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* exchanges. 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 exchange by its unique index number. Freezing an exchange in Intralinks Designer enables you to retain the order of existing exchange content.

Intralinks Designer is designed to be used with both Intralinks and Intralinks Classic exchanges. It can be used by exchange 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 Intralinks and Intralinks Classic exchanges. If you are working with an IL5 workspace, please refer to the *Intralinks Designer User Guide for IL5*.

Terms used in this document

The following terms are used throughout this User Guide:

- "Intralinks primary service" refers to the Web-based Intralinks exchanges that users will log into, and not the exchanges viewed in Intralinks Designer. Think of the Intralinks primary service as the original versions of your exchanges; the versions you view in Intralinks Designer are copies that you are free to change. When you upload these changes, your original exchanges are updated.

- The term "content item," or either word used alone, refers to the folders and documents that appear on your exchanges.

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.

Activating your account and logging in the first time

If you are a new user to Intralinks, that is, you have not activated an Intralinks account, when you are invited to Intralinks, you will receive an email message from Intralinks. The message includes a link to activate your account. Activating your account includes steps for accepting the EULA, creating a password, and setting up two factor authentication to ensure your account is secure.

Note: If your organization uses Intralinks' Single Sign-On (SSO) functionality, you will not receive an email message.

▶ **To activate your account**

1. Locate the email messages containing your invitation to Intralinks.

2. Click **Activate Account**. VDRPro's license agreement is displayed.

3. Read the license agreement and click **Accept** to continue logging in.

   If you do not agree to the terms of the license agreement, click **Decline**. You will not be able to log in until you account the license agreement.

4. Enter your password/passphrase.

5. Reenter your password/passphrase and click **Next**.

6. Set up how you want Intralinks to verify your identity by setting up one or more of the following options:

   Receive a code by text (SMS) – Select the country and enter the phone number to which you want an SMS code to be sent and click **Activate**.

   Use Okta Verify – Scan the QR code or enter the secret key displayed in this dialog box in the Okta Verify App on your phone. Click the icon at the end of

the secret code to copy the code. In the **Verification code** field, enter the 6-digit code generated by the app and click **Activate**.

Use your preferred authenticator – Scan the QR code or enter the secret key displayed in this dialog box in the Authenticator App on your phone. Click the icon at the end of the secret code to copy the code. In the **Verification code** field, enter the 6-digit code generated by the app and click **Activate**.

7. When you have finished setting up account security, click **Finish**. You can now start Intralinks Designer and log in.

Logging in after you have activated your account

After you activate your account, you can log in to Intralinks Designer using the credentials that you configured.

▶ **To start Intralinks Designer**

1. From the Windows **Start** menu, choose **All Programs** > **Intralinks** > **Intralinks Designer** > **Intralinks Designer**.

2. 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.

3. In the **Email Address** field, enter the email address for the account where you received your invitation to the exchange and click **Next**. The log into Intralinks dialog box is displayed.

4. Click **Next**.

   Note: If your organization uses Intralinks' Single Sign-On (SSO) functionality and you will be directed to your organization's log in page.

5. In the **Password** field, enter your password/passphrase and click **Login**.

6. If you have forgotten your password/passphrase, click the **Forgot your Password?** link and follow the instructions that appear on your screen. (For step-by-step instructions, refer to *"Changing an expired or forgotten password"* in the next section.

7. If you are asked to verify your identity, in the **Verification Code** field enter the security code and click **Next**. The security code is sent based on the method you selected when you activated your account.

   The security verification is triggered based on the result of evaluating security behavior and risk-based authentication, referred to as adaptive authentication. Security behavior detection continually tracks specific user behavior and generates a challenge when any change in the tracked history of behavior for a given user is detected, such as a new device that has never been used or a new geographic location from which the user has never logged in to Intralinks.

   Risk-based authentication is an additional layer of security that evaluates risk automatically using multiple features such as IP address, device, and behaviors for each user attempting to authenticate. Risk-based authentication is done with security behavior detection.

Changing an expired or forgotten password/passphrase

The need to change your password typically is required under the following circumstances:

- You have forgotten your password/passphrase. You can change your password by clicking **Forgot password?** during login.

- Your password/passphrase has expired. Typically, passwords expire every 365 days to ensure the security of the exchange. If your password has expired, a message appears when you attempt to log in and you are guided through the password reset process.

  Note: If your organization uses Intralinks' Single Sign-On (SSO) functionality, you do not have a separate Intralinks password, and you will not receive password expiration alerts.

▶ To change a forgotten password/passphrase

1. On the login screen, enter your email address and click **Next**.

2. Click **Forgot password?**

3. In the **Verification Code** field, enter the verification code that is sent to you and click **Next**.

4. In the **Password** and **Confirm Password** fields, enter the new password/ passphrase. For greater security, create a strong password/passphrase as indicated by the password strength meter.

5. Click **Next**.

▶ To change an expired password/passphrase

1. On the login screen, enter your email address and click **Next**.

2. Enter your password/passphrase and click **Login**. The **Update Password** screen is displayed.

3. In the **Password** and **Confirm Password** fields, enter the new password. For greater security, create a strong password/passphrase as indicated by the password strength meter.

4. Click **Next**.

Selecting an exchange

▶ To select an exchange

1. A list of the exchanges you are allowed to modify is displayed. Double-click the exchange you want to work with. (If you are a member of a business group who is allowed to view templates, the list includes templates, as well. Likewise, if you have created working sets — collections of exchanges — in Intralinks Classic, the list displays them.)

   Intralinks exchanges can be identified by a white cube icon ⬚. Intralinks Classic exchanges can be identified by a blue cube icon ◼. IL5 workspaces can be identified by a icon of a hand holding a white cube 🖐.

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

2. Double-click the name of the exchange you want to work with. You can also select the exchange from the **Exchange** drop-down list.

3. Depending upon the settings for this exchange, you may be required to view and accept an exchange agreement before continuing. If a splash screen containing an exchange agreement appears, read the agreement, then click **Accept** or **Continue**.

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

If you are working with a new exchange for which no content has been added yet, you will see an icon for the exchange 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 exchanges that appears in step 3 includes only those exchanges that you have worked on previously and saved but have not yet updated.

▶ **To display the same exchange each time you start Intralinks Designer**

If you usually work with a particular exchange, you can set Intralinks Designer to display that exchange 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 exchange you want from the list that appears below the option.

3. Click **OK**.

▶ **To view a list of templates or working sets**

If you are a member of a business group and your membership level allows you to view templates, you can view a list of the templates that you can use to create new exchanges. The following business members can view templates: coordinator; member 50, member 40, member 20 and member 10.

If you have created working sets — collections of exchanges that you can use for performing tasks and printing reports — you can view them, as well. (Working sets must be created using Intralinks Classic on the Web; they cannot be created in Intralinks Designer.)

For more information about business groups and working sets, see the *Intralinks Classic User Guide*.

1. If the exchange list is not displayed, select **All Items** from the **Exchange** list near the top of the screen. A list of all your exchanges, templates and working sets is displayed.

2. From the **Show** menu, select either **Templates** or **Working Sets**. The items that you selected are displayed.

3. To view exchanges again, select **Exchanges** or **All Items** from the **Show** menu.

Ending your current Intralinks Designer session

Note: If you started Intralinks Designer from within Intralinks or Intralinks Classic, both applications will close when you exit either application.

▶ **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 exchange as it was before you began making changes in Intralinks Designer.

     If you save changes but did not updated your exchange, a message will appear the next time you select this exchange using Intralinks Designer, asking whether you want to view the saved changes or a copy of the current version of the exchange 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:
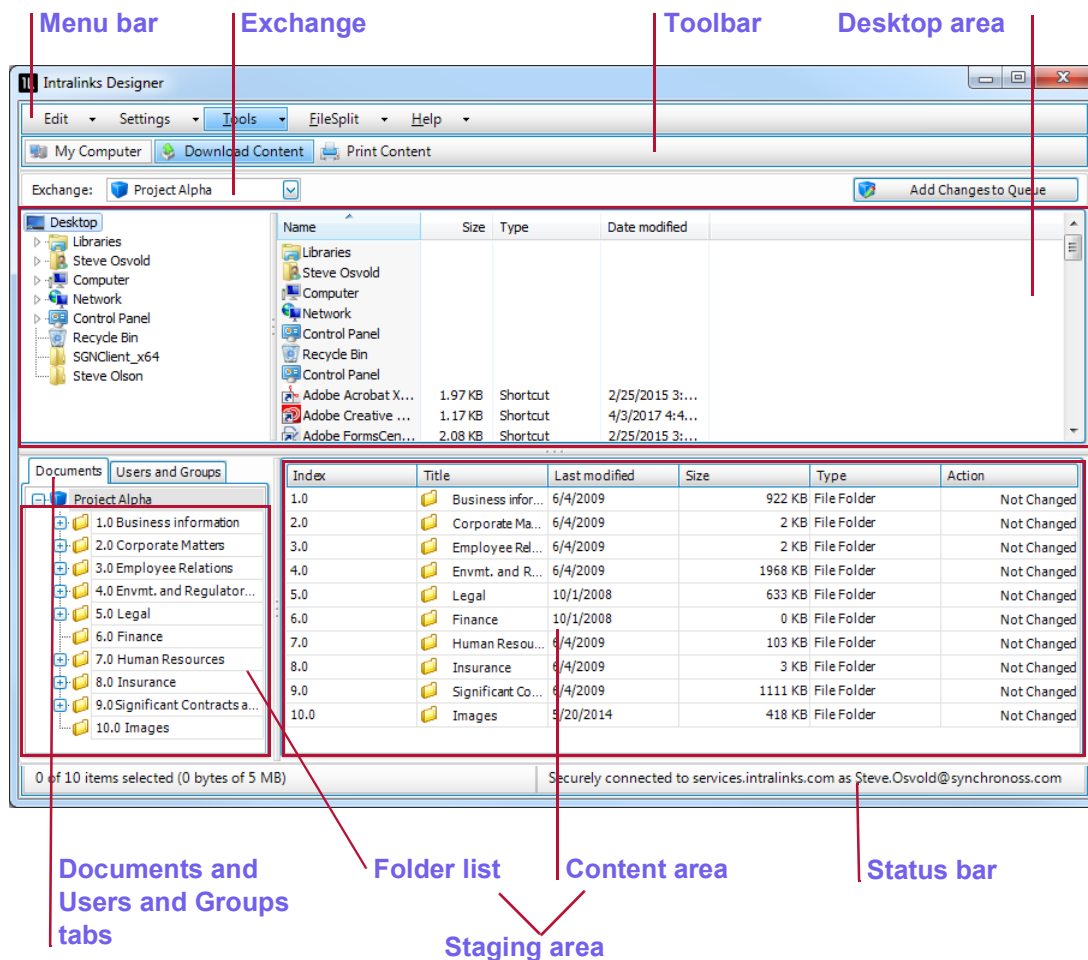
Figure 8: Intralinks Designer screen elements

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 exchange when they are uploaded, but the original files will not be changed in any way.

The *staging area* displays the contents of the selected exchange, or the users on the exchange, along with any changes made since the exchange 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 *exchange groups list* and the *users list*. The exchange groups list, on the left below the tab, displays all the user groups that have been added to the exchange. 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 exchange role is displayed, along with the date on which the person last accessed the exchange, 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 exchanges whose content you can modify. The name of the open exchange 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 documents, folders, exchange icons (including the exchange 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 document, the following options appear on the menu: **Edit Document Settings**, **Permissions**, **Delete**, **Rename**, **Edit Custom Field Values** and **Download**.

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 **IL** 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 exchanges.

- **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: Creating exchanges and managing settings and custom fields

Overview

Read this chapter for overviews about:

- Creating an exchange using an existing template

- Creating an exchange by copying an existing exchange

- Viewing and changing exchange settings

- Adding and configuring custom fields

Creating a new exchange from a template

Using Intralinks Designer, you can create new exchanges using templates that have been set up for your business group. The settings from the template will be used, along with any users, user groups, folders and documents associated with the template. Depending upon the terms of your organization's contract with Intralinks, your organization may be billed for each exchange that you create.

In order to create exchanges using Intralinks Designer, you must have a business group membership that provides you with this right. Business group memberships that are allowed to create exchanges include member levels 10, 20, 40, 50 and 60, or coordinator.

Business groups and templates must be created by an Intralinks employee. For more information about business groups and templates, see the *Intralinks User Guide for Managers and Publishers or* the *Intralinks Classic User Guide for Managers and Publishers*.

When you create an exchange using Intralinks Designer, you are added to the exchange automatically and are assigned the highest available exchange role allowed on the exchange. For most exchanges, this role is Manager Plus. In addition, you are selected as a key contact for the exchange.

▶ **To create an exchange from a template**

Your computer must be connected to the Internet in order to create exchanges.

1. Click the **New Exchange** button on the toolbar. The **New Exchange** screen appears.

2. Using the **Template** list, select, the template that you want to use for the new exchange. The business group, organization and host associated with the template you selected are displayed.

3. Enter a name for the exchange and a description of it.

    If this exchange is used for Debt Capital Markets and a CUSIP number is associated with it, enter that number.

4. Click **Create**.

The exchange is created, based on the template that you selected in step 2. Any documents, users and groups, and permissions associated with the template are added to the new exchange. Email alert settings also are copied from the template; these items can be changed only by an Intralinks employee. Contact Intralinks if you wish to change these items.

By default, newly created exchanges are set to the hold phase, but you can change this setting and other exchange settings if you like. For more information, see "Viewing and changing exchange settings" on page 18.

Creating a new exchange by copying an existing exchange

You can create new exchanges by cloning (making copies of) existing exchanges.

In order to create new exchanges by cloning, you must be a member of an active business group, and your membership must allow you to create new exchanges using the template that was originally used to create the exchange that is being copied. In addition, you must have one of the following roles on that exchange: Manager Plus, Hidden Manager Plus or Manager.

Note: If the exchange that you are copying uses folder permissioning, the exchange must have 2,000 or fewer folders. Exchanges with a larger number of folders cannot be copied if they use folder permissioning. Also be aware that duplicate folders may appear on your new exchange if the template used to create the original exchange included folders. For example, if the template includes *Folder A*, the original exchange that was created from the template also includes a *Folder A*. If this is the case, your new exchange will have two folders, one named *Folder A*, and the other named *Folder A(1)*.

If the source exchange is used for Debt Capital Markets and a CUSIP or ISIN number is associated with it, that number will be used for the new exchange, as well. You can change it if necessary; for more information, see "Viewing and changing exchange settings" on page 18.

▶ **To create an exchange by copying an existing exchange**

Your computer must be connected to the Internet in order to create exchanges.

1. Display a list of all your exchanges. If you are working within an exchange, select **All Items** from the **Exchange** list near the top of the screen.

2. Locate the exchange that you want to copy.

3. Right-click on the exchange; a menu appears.

4. From the menu, select **Copy This Exchange**. The **Clone Exchange** screen appears.

5. Enter a name for the new exchange and a description of it.

6. If you want to base the new exchange on a template other than the one used for the exchange being copied, select the template you want. Do this if you want to copy content into an exchange with a different structure than the one used by the source exchange.

   This can be useful for projects that are being transitioned from one phase to another in their life cycle. For example, Debt Capital Markets (DCM) and Alternative Investments (AI) clients might use this functionality when fundraising for a deal is complete and investor reporting begins, or when a

loan is moved from primary to agency to secondary phases. (This functionality is available to all managers who have the ability to create new exchanges; it is not limited to DCM and AI managers.)

7. (Optional.) Review the exchange settings (including settings for footers and splash screens) that will, and will not, be copied to the new exchange. Click the **Details** link to open the **Exchange Settings Details** screen.

    Each exchange setting is listed on this screen, along with an indication of whether it will be copied. If the setting cannot be copied, a brief explanation is provided.

    Note: If you selected a template in step 6, be aware that exchange settings that can be changed only by Intralinks administrators cannot be copied unless the settings have been enabled on the template that you selected. Any settings that cannot be copied for this reason are noted.

    When you have finished reviewing the settings, click **Close** to redisplay the **Clone Exchange** screen.

8. Select the items that you want to copy from the source exchange. Select from the following items:

    *   Users

    *   Groups

    *   Folders (including their permissions, if folder-level permissioning is being used)

    *   Documents, and their permissions

    *   Q&A categories, if Q&A is being used

    *   Business process configurations

    *   Naming conventions (Note: naming conventions are not copied to the new exchange if you selected a different template for the new exchange in step 6)

    *   Group member roles

    Note for Debt Capital Markets (DCM) users: If you selected a DCM template in step 6, any items that are not marked will be copied from the template that was selected in step 6. In addition, custom fields and all exchange settings that can be set by exchange managers are always drawn from the DCM template.

    You can select specific users, groups, folders and documents that will be imported. To do so, click the **Select** link next to these items; a screen appears, allowing you to indicate the items that will be imported.

    Information about the items being imported (for example, notes, effective dates for documents, and descriptions) will be copied, as well.

    If you choose to copy business process configurations or Q&A categories, groups will be copied automatically, as well. If you choose to copy documents, folders will be copied automatically.

    Note that if buyer groups and collaboration groups are enabled on your source exchange but are not enabled on the template used to create the source exchange, all groups will be copied as exchange groups.

Also note that the following exchange settings must be enabled in order for you to import naming conventions: **custom fields**, **effective date**, **document ownership** and **naming rules**.

9. Click **Create**.

You will be added as a member of the new exchange with the highest role that is available on the exchange. Typically this is Manager Plus. You also will be made a key contact for the exchange.

All the settings used by the source exchange will be used for the new exchange, with the exception of the Enhanced Security setting and settings that must be changed by an Intralinks employee. Custom fields will be copied from the existing exchange to the new exchange automatically. Changes can be made to the exchange settings as long as the settings can be changed on the original exchange. (Some settings cannot be changed on exchanges, or must be changed by Intralinks employees.)

You can use Intralinks Designer to change the splash screen and exchange footer information for the new exchange. For more information, see "Viewing and changing exchange settings" below.

Documents and folders within the newly created exchange will display the date and time that the exchange was created as their creation date.

By default, newly created exchanges are set to the hold phase, but you can change this setting if you like. For more information, see "Viewing and changing exchange settings" below.

Viewing and changing exchange settings

Using Intralinks Designer, you can view and update the exchange settings that determine whether certain functions, such as Q&A and effective dates, are available in your exchange, and how some functions, such as watermarking, work. You can view and change settings both for exchanges that are newly created in Intralinks Designer and existing exchanges created using the Intralinks primary service. (Some settings can be changed only by an Intralinks employee. If you are unable to change a setting, contact Intralinks customer support for assistance.)

Exchange footers and splash screens also can be changed using Intralinks Designer. Splash screens can be used to welcome new users to the exchange and to reinforce your corporate brand. Splash screens often include non-disclosure agreements or similar legal statements that are meant to discourage exchange users from sharing information on the exchange improperly.

If your exchange requires reviewers and previewers to make a public or private declaration, you can enter separate text for public and private exchange users. (The same images and URLs are displayed for both public and private users.)

Unlike a splash screen, the footer always appears at the bottom of your exchange, regardless of the screen that is displayed. Footers typically are used to provide branding and links to information elsewhere on the Internet that is relevant to your exchange users. Bear in mind that all users, regardless of their exchange role, can see the footer, so avoid including links that are inappropriate for some groups within the exchange. In addition, the footer provides contact information for Intralinks customer support; this information cannot be removed or changed.

To learn more about specific exchange settings, including splash screens and footers, see Appendix B, *Exchange settings*, on page 76.

▶ **To view and update exchange settings**

The exchange you wish to update should be displayed.

1. Locate the exchange in the folder list on the left side of the staging area. It can be identified by a white cube icon ⬡.(if it is an Intralinks exchange) or a blue cube icon 🔷 (if it is an Intralinks Classic exchange). Right-click on the exchange; a menu appears.

2. Select **View/Update Settings**. The **View/Update Exchange Settings** screen appears, displaying general information about the exchange.

   (If you have made changes to the exchange and have not uploaded them yet, a message will appear asking you to upload or discard the changes before making changes to exchange settings.)

3. Click the tabs that appear on the screen to view general settings, along with settings for documents and users and groups, advanced settings, splash and footer. Make any changes that are needed.

4. When you have finished viewing and updating the settings, click **Save**. Your changes are applied to the exchange automatically; they do not need to be queued and uploaded as other changes do.

Adding and configuring custom fields

Custom fields allow you to describe your documents, groups and exchanges in greater detail. Custom fields enable you to enter specific pieces of information, such as expiration dates, locations, and the like. In the past you may have used the **Notes** field to keep track of this information; with custom fields you can more easily manage the information and ensure that it is entered consistently.

Intralinks provides you with a set of preconfigured custom fields. You can change the labels (names) that appear onscreen for these fields if you like; your changes will affect all the members of the exchange. You can add custom fields and disable the fields that you do not wish to use. You can use Intralinks Designer's import function to add or modify many custom fields at the same time.

Custom fields are based on the following field types:

- **Text:** Fields of this type enable you to enter any text you like (alphabetic and numeric characters and symbols)

- **Date:** For date fields you can enter a date or select it from a pop-up calendar.

- **Numeric:** Only numbers can be entered into numeric fields.

- **Options:** With this type of field (also known as a multi-selection list), you can select one or more pre-defined items from a list. (To select multiple items, press the SHIFT key while clicking them.)

In order for you to use custom fields, the **Custom fields** exchange setting must be marked. You also must publish the custom fields.

You can set default (suggested) values for custom fields. These default selections will appear as suggestions to users whose custom field permission allows them to control the custom field, and as automatic entries for users whose role does not allow them to change the custom field.

▶ **To configure and publish the custom fields on your exchange**

Note that not all custom fields may be available for editing.

1. Click the **Custom Fields** button on the toolbar. The **Configure Custom Fields** screen appears.

   (If you have made changes to the exchange and have not uploaded them yet, a message will appear asking you to upload or discard the changes before making changes to custom fields.)

2. Click the tab for the type of field that you want to add: **Document Custom Fields**, **Group Custom Fields** or **Exchange Custom Fields**.

3. To inactivate a custom field, unmark the **Active** option next to the field. To reactivate the field, mark the box again.

   Only active (enabled) fields will be visible to exchange users once the custom fields have been published.

   Fields that have been marked as read-only cannot be inactivated (disabled).

4. If users are required to make an entry in the custom field before adding a document or group or when creating an exchange, mark the **Required** box.

5. If you do not want other users to be able to change the label, the default value displayed for the custom field, or the permissions set for each exchange role, mark the **Read Only** option.

   If you mark this option, the selected field can be enabled (if it is marked as disabled), but it cannot be disabled again. In addition, you cannot unmark the **Read Only** option for fields that are in use on business processes within the exchange; you can mark this option, however, for fields that are editable.

   Also note that options that appear for List fields cannot be edited or deleted if the fields are marked as read only.

6. Review and update a custom field's properties, default values and permissions. Click the arrow button in the **Actions** column for the field that you want to change and select Edit Properties from the menu that appears. The **Properties** tab of the **Custom Field Definition Wizard** appears.

7. To rename a field, enter the name that you want to use in the **Label** field.

   Note that you can change only the label; the field type cannot be changed. Also remember, if the field is marked as **Read Only**, the label cannot be changed.

8. Click the **Values** tab to view the default value (if any) that has been entered for this custom field.

   In most instances, default values are optional; however, you *must* set default entries for required fields if they have been set to **Hidden** or **See** for any exchange roles or individuals. An asterisk (*) appears next to the names of required fields on the **Configure Custom Fields** screen.

   The fields that appear on the **Values** tab vary depending upon the type of field that you are viewing:

- For **String** fields, enter a string of text (letters, numbers and other characters) in the **Default Value** field. This text will appear automatically when users display screens where this field appears.

- For **Number** fields, enter a number in the **Default Value** field. This number will appear automatically when users display screens where this field appears.

- For **Date** fields, select one of the following options:

  - **DD/MM/YY**: Enter or select the date that will appear by default for this field.

  - **Creation Date**: The date on which the document was created will appear as the default date.

  - **Creation Date +1**: The day following the date on which the document was created will appear as the default date.

- For **List** fields, select **Yes** from the **Default** list to make the selected option appear as the default selection.

  To add an option, click the **Add Option** button and enter the text that will appear in the list in the **Label** field. Be sure that the label you enter does not appear in the list already; each label can appear only once in a list.

  Existing options cannot be edited or deleted in Intralinks Designer. If you wish to edit or delete an option, log into Intralinks or Intralinks Classic to do so.

9. Next, select the level of access that users with specific exchange roles will have to document and group custom fields.

   Access levels allow you to prevent users with specific exchange roles (such as publisher or reviewer) from changing the values for custom fields, or from viewing the custom fields altogether. This can be especially useful for custom fields that are used to trigger business processes; by limiting who can change custom field values, you can ensure that the process workflow is not altered and prevent errors.

   For each exchange role that is displayed, select one of the following options:

   - **Control** — Users given this permission can view the custom field and change the value selected for it.

   - **See** — Users given this permission can view the custom field, but they cannot make any changes to the value that is displayed.

   - **Hidden** — Users who are not given any custom field permission can neither view the field nor make changes to the value selected for it.

   Users with the Manager Plus role automatically have the ability to control custom fields.

   If the field has been marked as **Read Only**, these permissions cannot be changed.

10. Click **Save**. The **Configure Custom Fields** screen reappears.

11. Repeat the previous steps for each field that you wish to change.

12. (Optional.) If you want to change the order in which the custom fields, click on the III icon to the left of a field you want to move and drag the field to its new location.

13. If you are ready for exchange users to begin using the custom fields, mark the **Publish** option next to the **Collection Status** field at the top of the screen.

    Once the custom fields have been published, they cannot be returned to draft status.

14. When you have finished making changes, click **Save**.

▶ **To add a custom field**

Use this procedure to add a single custom field at a time. If you want to add many fields, you may find it faster to create a spreadsheet with information about the fields and then import it. To learn more about importing custom fields, see "Importing custom field information" on page 23.

1. Click the **Custom Fields** button on the toolbar. The **Configure Custom Fields** screen appears.

   (If you have made changes to the exchange and have not uploaded them yet, a message will appear asking you to upload or discard the changes before making changes to custom fields.)

2. Click the tab for the type of field that you want to add: **Document Custom Fields**, **Group Custom Fields** or **Exchange Custom Fields**.

3. Click the **Add New Custom Field** button. The **Properties** step of the **Custom Field Definition Wizard** screen appears.

4. Enter a label for the field. Be sure that the name you enter will be understood by all users who will have access to this field.

5. Select the type of field you are adding:

   • **Number**: The field will be used to track a numeric or monetary value

   • **String**: The field will require a text entry (alphabetic and numeric characters and symbols)

   • **Date**: The field will be used to track calendar dates.

   • **List**: The field will provide users with a pre-defined list of options, and users will be allowed to select one or more of those options.

6. Click **Next**. The **Values** step of the wizard appears.

7. If you wish to provide a default (suggested) entry for the field, enter that value.

   In most instances, default values are optional; however, you *must* set default entries for required fields if they will be set to **Hidden** or **See** for any exchange roles or individuals.

   The fields that appear on the **Values** tab vary depending upon the type of field that you are viewing:

   • For **Number** fields, enter a number in the **Default Value** field. This number will appear automatically when users display screens where this field appears.

- For **String** fields, enter a string of text (letters, numbers and other characters) in the **Default Value** field. This text will appear automatically when users display screens where this field appears.

- For **Date** fields, select one of the following options:

  - **DD/MM/YY**: Select the date that will appear by default for this field.

  - **Creation Date**: The date on which the document was created will appear as the default date.

  - **Creation Date +1**: The day following the date on which the document was created will appear as the default date.

- For **List** fields, select **Yes** from the **Default** list to make the selected option appear as the default selection.

  To add an option, click the **Add Option** button and enter the text that will appear in the list in the **Label** field. Be sure that the label you enter does not appear in the list already; each label can appear only once in a list.

8. Click **Next**. The **Permissions** step of the wizard appears.

9. Select the level of access that users with specific exchange roles will have to document and group custom fields.

   Access levels allow you to prevent users with specific exchange roles (such as publisher or reviewer) from changing the values for custom fields, or from viewing the custom fields altogether. This can be especially useful for custom fields that are used to trigger business processes; by limiting who can change custom field values, you can ensure that the process workflow is not altered and prevent errors.

   For each exchange role that is displayed, select one of the following options:

   - **Control** — Users given this permission can view the custom field and change the value selected for it.

   - **See** — Users given this permission can view the custom field, but they cannot make any changes to the value that is displayed.

   - **Hidden** — Users who are not given any custom field permission can neither view the field nor make changes to the value selected for it.

   Users with the Manager Plus role automatically have the ability to control custom fields.

10. Click **Save**. The **Configure Custom Fields** screen reappears.

11. If you want to require users to make an entry in the custom field before adding a document or group or when creating an exchange, scroll through the list of custom fields to locate the new field, then mark the **Required** box that appears next to it.

12. Click **Save**.

Importing custom field information

You can import information about document, group and exchange custom fields using Intralinks Designer. Information about the required data format is provided in a sample file that is available from the screen that is used to import custom

fields. Instructions for printing and using the sample file are included in the procedure below.

When you import custom fields, a number of restrictions apply:

- Each of the custom field types (document, group and exchange) must be imported separately using a separate Excel worksheet.

- You can import custom fields in either draft or published mode, but you cannot change the mode using the import process.

- Only new custom fields can be imported; existing custom fields cannot be updated or deleted using the import process.

- Permissions for imported custom fields must be set manually.

- You can import values for custom fields with the field type of Option. (These fields appear as drop-down lists with a set of pre-determined options.) Only new values can be imported; they will be appended to any existing values for the fields being updated.

- The import file must be a Microsoft Excel file in .XLS or .XLSX format. The file must be set up properly in order for you to import the information successfully. Be sure to read the setup instructions included with the sample file before you begin creating your import file!

▶ **To import custom field information**

1. Click the **Custom Fields** button on the toolbar. The **Configure Custom Fields** screen appears.

2. Click the tab for the type of field that you want to import: **Document Custom Fields**, **Group Custom Fields** or **Exchange Custom Fields**.

3. Click the **Import From File** button. The **Import Custom Fields** screen appears.

   If you need to create an import file, continue to step 4. If you have created your import file already, skip to step 8.

4. If you have not created an import file containing information about the custom fields that you are adding, click the **download** link to download a sample file that you can review and modify. The **Select File Location to Download** dialog box appears; select a location for the file, enter a name for it, and click **Save**.

5. Open the sample file. The **Instructions** tab appears. Read the instructions carefully before continuing.

6. Click the **Sample** 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.

7. Create your import file. Remember that separate import files are required for document, group and exchange custom fields.

8. When your import file is complete and you are ready to begin the import process, click the **attach** link. A **Select File** 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.

9. 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 or Intralinks Classic to complete the import process. For instructions on uploading changes, see Chapter 6, *Queuing and uploading your changes to the Intralinks primary service*, on page 65.

Disabling custom fields

You can disable a custom field if you no longer want it to appear when users add a document or group or create an exchange.

▶ **To disable a custom field**

1. Click the **Custom Fields** button on the toolbar. The **Configure Custom Fields** screen appears.

2. Locate the custom field that you want to disable.

3. From the **Actions** list that appears next to the field, select **Enable/Disable Fields**. A sub-menu will appear; select **Disable**.

Removing custom fields

Custom fields must be disabled before they can be removed. Use the procedure in the section above to disable the fields before completing the steps below.

You can remove custom fields only if the collection status is Draft. Once the custom fields have been published, they can be inactivated, but they cannot be deleted.

▶ **To remove a custom field**

1. Click the **Custom Fields** button on the toolbar. The **Configure Custom Fields** screen appears.

2. Locate the custom field that you want to remove and highlight it.

3. Click the **Remove Custom Field** button.

Chapter 4: Managing documents

Overview

Read this chapter for information about:

- Creating folders and documents

- Adding content to your exchange

- Using indexed and unindexed folders

- Replacing existing documents with a newer version

- Comparing the contents of your exchange with the contents of a folder on your computer or network drive

- Allowing reviewers and previewers to add documents to your exchange

- Identifying document owners

- Setting permissions for documents

- Reorganizing information

- Freezing and unfreezing the contents of your exchange

- Previewing your changes

Creating folders and document placeholders

Indexing folders and their contents

You can index folders and their contents to organize the contents of your exchange 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 exchange 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 exchange 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 exchange.

Indexing is an optional feature, and your exchange may not use it. By default, new folders on indexed exchanges 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** exchange setting must be marked (on) for the exchange.

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

Subfolders and documents are assigned the index number of their parent folder, and an additional decimal place is added based on the subfolders' and documents' position within the parent folder. If the parent folder is moved, both its

index number and the index numbers of subfolders and documents within it are updated. Index numbers are not part of the item's name.

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

Creating folders and placeholders

▶ **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 exchange 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 exchange you want to modify. Be sure that the **Documents** tab is selected.

1. To create a top-level folder, right-click the exchange 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 folder names is 60. The folder name cannot contain the following characters: / \ : * " < > ? |

4. If you are creating a folder at the top level of the exchange, 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 26.

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

▶ **To create a document placeholder**

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

2. Select **New Placeholder** from the menu. A document placeholder is created in the folder you selected.

3. Enter a name for the document placeholder.

Note: The maximum number of characters allowed in a document placeholder name is 245. Document names cannot begin with a period (.). The document placeholder name cannot contain the following characters: / \ : * " < > ? | %

Adding content to your exchange

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

If long path support has been enabled on your operating system, you can upload documents from paths longer than 260 characters. Contact your system administrator for information on whether long paths are enabled on your system.

▶ **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 custom fields are enabled for your exchange, a dialog box appears after you drag a document to the staging area. This dialog box lists all the custom fields that have been enabled for this exchange. Enter or select a value for all the fields that apply to this document. Keep in mind that some custom fields may be required, and the document cannot be uploaded to the Intralinks primary service until entries have been made for these fields. An asterisk (*) appears next to fields that are required.

   If you move a folder or document to a location that already contains an item with the same name, you are prompted to choose whether to replace the existing folder or document or create a copy.

   If you move a folder or document that has an index number, you are prompted to choose whether to keep the index numbers or remove them. If you remove them, they are removed from the folder or document name.

Setting effective dates

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

▶ **To set an effective date for one or more documents**

1. In the content area of the screen, highlight the document or documents and right-click. A menu appears.

2. Select **Edit Document 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 document 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 document within the folder will have the index number 2.1.1.

For more information, see "Indexing folders and their contents" on page 26.

Replacing an existing document with a newer version

From time to time, you may need to replace a document that already exists on the exchange. If you do not need to send an alert about the update to permissioned users, use the steps below to quickly update the document.

▶ **To replace an existing document with a newer version**

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

1. Locate the document that you want to replace and right-click on it.
2. From the menu that appears, select **Replace Document**. The **Open** dialog appears.
3. Locate the updated version of the document and highlight it.
4. Click **Open**. The dialog box closes and the original document is replaced with the version you selection.

Copying a document from your computer to multiple locations in Intralinks and updating custom fields

You can copy a document to multiple exchanges and folders at one time using the Copy Document Wizard.

To begin, you must create a spreadsheet in .csv, .xlsx o r .xls format. This spreadsheet must have columns for the following information:

- Exchange ID (available on the Exchanges List)

- Path for the folder in each exchange where you want the document to be copied

- Optionally, custom fields if you are using them and if your spreadsheet is in either .xlsx or .xls format.

- Optionally, the effective date of the document.

You can download a sample file that includes instructions for how to set up your spreadsheet in the **Import file** step of the wizard.

If the exchanges you are uploading to use index numbering, do not include the index numbers in the folder paths. If the spreadsheet contains additional columns, they will be ignored. Be sure to give the spreadsheet an easy-to-remember name and make a note of the location where you saved it.

Note: Some exchanges may require users to accept a splash screen agreement or confirm their identities using multi-factor authentication (MFA). These requirements must be met before documents are copied to these exchanges. If the requirements are not completed, these exchanges will be skipped during the upload process. Also be sure to upload or remove any previously saved changes to the exchanges being updated before you attempt to upload documents.

▶ **To copy a document to multiple exchanges and folders**

Be sure you have created a spreadsheet with information about the exchanges and folders where you want to add the document. You will need this spreadsheet in step 5 below. You can download a sample spreadsheet with instructions in the **Import file** step of the wizard.

1. Display a list of all your exchanges. If you are working within an exchange, select **All Items** from the **Exchange** list near the top of the screen.

2. Click the **Upload Documents** button in the toolbar at the top of the screen. The **Select Document** step of the **Upload Documents to Multiple Locations** wizard appears.

3. Click **Browse** and select the document you want to upload. Then click **Open**.

4. Click **Next**. The **Import File** step of the wizard appears. If you have created an import file, skip to step 9, otherwise, continue with step 5.

5. If you have not created an import file containing information about the documents that you are uploading, click the **sample** link in **View sample Excel file** to open a sample file that you can review and modify. The sample file will be opened in Microsoft Excel.

6. The **Instructions** tab of the file is displayed. Read the instructions carefully before continuing.

7. Click the **Sample** tab to view an example of how to set up your import file.

8. Create your import file.

9. Click **Browse** and select the spreadsheet that contains information about the locations where the document will be uploaded. Then click **Open**.

10. Review the information in the remaining fields in the **Import File** step and make any needed changes and click **Next**. The **Match Import Fields** step appears.

11. The **Exchange ID** and **Folder Path** fields in Intralinks are automatically matched to columns in the spreadsheet you imported. Review the fields to be sure that the matches are correct. If you need to make a change, click on the name in the **Import field** column and select another field from the list that appears. When you are satisfied with the entries, click **Next**.

12. The **Review Results** step appears. If a problem will prevent the document from being uploaded to any location, the issue is indicated in the **Result**

column, and an explanation of the problem is in the Comment column. Click **Back** if you need to make any changes, then return to the **Review Results** step.

To edit custom fields, click **Edit** in the **Custom Fields** column. Make any changes and click **Save**.

13. When you are ready to begin uploading the document to the selected location, click **Import**. The document will be uploaded to the selected locations.

Renaming documents and folders and updating custom field entries 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. If the exchange that you are updating uses custom fields, you can update the values that have been assigned to the documents for these fields, as well.

You can export the metadata (document and folder names and custom field values) for all the documents on your exchange, 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 exchange 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 exchange that appears above the folder list on the left side of the screen. A menu appears.

2. Select **Rename Documents & Folders**. 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 or Intralinks Classic to complete the import process. For instructions on uploading changes, see Chapter 6, *Queuing and uploading your changes to the Intralinks primary service*, on page 65.

Setting and updating custom field values for folders

Use the steps below to set or edit the values for custom fields assigned to a particular folder. Custom field values can be set for a single folder or for several folders at the same time.

▶ **To set or update values for a folder's custom fields**

The **Documents** tab should be displayed.

1. Locate the folder whose custom fields you want to change, and right-click on it. A menu appears.

   To update custom fields for multiple folders, press the SHIFT or CTRL key while clicking on the names of the folders that you want to select.

2. Select **Edit Custom Field Values**; the **Edit Custom Fields** screen appears.

3. Enter or select values for each field, as necessary. Fields marked with an asterisk are required, and an entry must be made for them.

4. When you have finished making changes, click **Save**.

Comparing the contents of your computer with your Intralinks exchange

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 exchange that you have selected for staging.

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

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

▶ **To compare the contents of a local folder with your Intralinks exchange**

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 exchange appears on the right side of the screen. Locate the folder that you want to compare and highlight it. Or highlight the exchange itself if you want to include all the contents of the exchange 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 exchange 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.

Allowing reviewers and previewers to add documents to your exchange

If the **Allow Reviewers and Previewers to add documents to selected folders** exchange setting is marked, you can give the reviewers and previewers in selected user groups the ability to add documents to specified folders. These users will be able to change, delete and move the documents that they have added to other folders for which they have the ability to add documents.

▶ **To allow reviewers and previewers to add documents to a selected folder**

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

Note: The **Set Document Creation Rights** command is available on the **Actions** menu only if the **Remember selections for future documents and subfolders** exchange setting is *unmarked* for the exchange that you are using. If the **Set Document Creation Rights** command is dimmed, use the procedures in "Setting permissions for all the documents within a folder" on page 37 instead.

1. Right-click the folder in which reviewers and previewers will be allowed to add documents. A menu appears.

2. From the menu, select **Document Creation Rights**. The **Set Document Creation Rights** screen appears.

3. Mark the **Allow Add** option for each group that contains reviewers and previewers who will be allowed to add documents to the selected folder(s).

4. Click **Apply**.

Identifying document owners

Depending upon how your exchange is set up, you can identify a particular user or collaboration group as the owner of a document. If you use this function, document ownership information can be used to select documents used by business processes.

▶ **To identify the owner of a document**

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

1. Locate the document that you want to assign an owner to and right-click it. A menu appears.

2. From the menu, select **Edit Document Settings**. The **Settings** screen appears.

3. In the **Choose Owner** field, select either **Group** or **Person**. Additional fields will appear.

   If the owner is a group: In the **Document Owner (Group)** field, select the group that will be the document owner. If you want to identify a specific member of the group as the owner, use the **For Selected Group Member** field to select the specific member of the group who will be designated as the group's owner.

   If the owner is a person: In the **Document Owner (User)** field, and select the owner from the list that appears. If you want to identify the group that the individual belongs to, use the **For Selected Group** field to select the group.

4. Click **OK**.

Setting permissions for documents

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

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

If your exchange uses folder-level permissioning, use the procedure below to override the permissions that have been inherited by individual documents. For more information about folder-level permissioning, see "Setting permissions for all the documents within a folder" on page 37.

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 permissions for selected documents or folders**

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 documents, select **Set Permission to Created Content** from the menu. **Note:** The **Set Permission to Created Content** command is not available if the **Remember selections for future documents and subfolders** exchange setting is marked for the exchange that you are using.

   If this exchange uses folder-level permissioning, a message appears to warn you that your changes will override any permissions that were set previously. Click **Override** to continue.

   The **Set Permissions** screen appears, displaying a list of all the groups that were created for this exchange.

2. If you are using folder-level permissioning, click the **Override** option next to each group whose permissions you want to change.

   If you are using document-level permissioning, the **Override** option is not available, and you can go on to the next step.

3. 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.

   Note: The **All Users - Current and Future** option can be used to give all users on the exchange permission to view documents. If you want for every exchange user, including those who have not been added to the exchange yet, to have permission to view the documents in this folder, mark the See box next to the **All Users - Current and Future** option. (Note: If this option has been disabled for your exchange, it does not appear.)

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

4. 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 documents only if their exchange 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.

   Note: The **All Users - Current and Future** option cannot be used to give users permission to control documents. The users must be assigned to a group that has been given control permission, or must have an exchange role (Manager Plus, Hidden Manager Plus, Manager or Publisher Plus) that gives them automatic permission to control all documents on the exchange.

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

5. If reviewers and previewers in the selected group are allowed to add documents to the selected folder, mark the **Allow Add** option next to the name of each group that will have this capability. These users will be able to change, delete and move the documents that they have added to other folders for which they have the ability to add documents.

    Mark or unmark the box that appears above the **Allow Add** column to give or remove this capability for all the groups on the exchange.

    The **Allow Add** option is available only if the **Allow Reviewers and Previewers to add documents to selected folders** exchange setting is marked.

6. Determine whether the documents will be protected.

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

▶ **To set permissions by user group**

Note: The **Group Permissions Manager** command is available only if the **Remember selections for future documents and subfolders** exchange setting is *unmarked* for the exchange that you are using. If this setting is marked, see "Setting permissions for all the documents within a folder" on page 37 instead.

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

1. Click the **Permissions** button on the toolbar. The **Group Permissioning Manager** appears, displaying the groups on this exchange.

2. Highlight the group for which you want to set permissions. The documents that have been added to the exchange appear, along with permissions that were previously set for the group.

3. For each document or publication, you can set the following permissions:

    –   **See** — The group has permission to view the selected item. If this option is not marked, the group members have no rights to use the item, and it will not appear when they view the exchange.

    –   **Control** — Document control allows users to change other users' permissions to the document, update the document or delete it. Group members will be able to modify the document only if their exchange roles (for example, manager or publisher) allow them to do so. If you are setting permissions for a buyer group, the **Control** column does not appear on the screen.

    –   **Protect** — For each permissioned group, you can choose an additional level of security for PDF and Microsoft Office (Word, Excel and PowerPoint) documents.

    –   **No Print** — The group is not allowed to print protected documents. If you mark this option, the **Protect** option is marked automatically.

    –   **Allow Add** — Reviewers and previewers in the selected group are allowed to add documents to the selected folder. These users will be able to change, delete and move the documents that they have added to other folders for which they have the ability to add documents. This

option is available only if the **Allow Reviewers and Previewers to add documents to selected folders** exchange setting is marked.

4. When you have finished setting permissions, click **Apply**. The wizard closes and the permissions that you selected are applied.

Setting permissions for all the documents within a folder

You can set or change permissions for all the documents in a folder — or for the documents in multiple folders — at the same time. This is referred to a *bulk permissioning*. Permissions can be set for only one folder at a time.

Depending upon how your exchange has been set up, when you use bulk permissioning, you will either set permissions for the documents within the folder, or assign permissions to the folder itself:

- If your exchange allows you to set permissions for the documents within a folder (*document-level permissioning*), your selections are applied to whatever documents are located in the folder at the time of permissioning. Documents added at a later time are not affected and must be permissioned separately.

- If your exchange allows you to set permissions for the folder itself (*folder-level permissioning*), your selections will be applied to the documents and subfolders within the folder at the time of permissioning. These selections will be remembered, and they will be assigned automatically to documents and subfolders added to the folder later.

Note that you can use one method of permissioning or the other, but not both at the same time. In either case, the permissions for individual documents (or subfolders, in the second instance) can be overridden, and different permissions assigned to them.

An exchange setting, **Remember selections for future documents and subfolders**, determines which method is used. For more information about exchange settings, see the *Intralinks User Guide for Managers & Publishers or* the *Intralinks Classic User Guide for Managers & Publishers*.

The steps that you will follow to set permissions is essentially the same regardless of the method selected for your exchange, but the results may be quite different. *Be sure that you know which method is being used for your exchange before setting permissions!*

▶ **To determine which permissioning method is selected for an exchange**

1. Locate the exchange in the folder list on the left side of the staging area. It can be identified by a white cube icon ⬜.(if it is an Intralinks exchange) or a blue cube icon 🟦 (if it is an Intralinks Classic exchange). Right-click on the exchange; a menu appears.

2. Select **View/Update Settings**. The **View/Update Exchange Settings** screen appears, displaying general information about the exchange.

   (If you have made changes to the exchange and have not uploaded them yet, a message will appear asking you to upload or discard the changes before making changes to exchange settings.)

3. Click the **Document Settings** tab.

4. Locate the **Remember selections for future documents and subfolders** exchange setting. (It is located in the **Bulk permissioning** section of the screen.)

   – If this setting is *unmarked*, the exchange uses document-level permissioning.

   – If this setting is *marked*, the exchange uses folder-level permissioning.

5. Click **Cancel** to close the window.

If your exchange uses folder-level permissioning (permissions are inherited)

When you set permissions for the *contents* of a folder (the documents and subfolders within it), and those settings are applied to existing contents and to all new content added to that folder. You will be able to override these default permissions for individual documents or subfolders when you add them to the upload queue if you like.

If you move documents or subfolders from one permissioned folder to another, the permissions are changed automatically. (Any changes you made to the inherited permissions will be remembered when the items are moved. All the inherited permissions for the old folder that have not been changed will be replaced by the inherited permissions for the new folder.)

▶ **To modify permissions for a folder's contents**

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

1. Highlight the folder that contains the documents that you want to permission.

2. Click the **Permissions** button on the toolbar.

   If this exchange uses folder-level permissioning and you selected a folder that is located within another folder, a message appears to warn you that any changes you make will override the existing permissions that have been inherited from the parent folder. Click **OK**.

   The **Set Permissions** screen appears.

3. For each group, use the list in the **Permission** column to change the group's permissions for the selected documents.

   • **See** – Members of the group will be able to view documents in the selected folder, but will not be allowed to change them in any way.

   • **Control** – Members of the group will be able to modify the documents if their exchange roles (for example, manager or publisher) allow them to do so. Document control allows users to change other users' permissions to documents, update the documents or delete them.

   Note: The **All Users - Current and Future** option can be used to give all users on the exchange permission to view documents. If you want for every exchange user, including those who have not been added to the exchange yet, to have permission to view the documents in this folder, mark the See box next to the **All Users - Current and Future** option. (Note: If this option has been disabled for your exchange, it does not appear.)

4. If the documents in this exchange are protected (the **enable protection of PDF and Microsoft Office documents** exchange setting is marked), a **Protection** column is displayed. For each permissioned group, use the list in the **Protection** column to change the group's ability to use the selected documents. If you want to change protection settings for all groups, make your selection from the **All Groups** list. (Note that you can change protection settings only for groups for which you have changed permissions.)

   For each group that is given See or Control privileges, select one of the following options from the **Protection** list:

5. If you wish to allow reviewers and previewers within a particular group to be able to add documents to this folder, mark the **Allow Add** box for that group. (This option is available only if the **Allow Reviewers and Previewers to add documents to selected folders** exchange setting is marked.)

   Reviewers and previewers in these groups also will be able to change, delete and move the documents that they have added to other folders for which they have the ability to add documents.

6. When you have made all the needed changes, click **Apply**.

Copying permissions from one folder or document to another

You can use the **Permissions** screen to review permissions for multiple documents and folders (if folder-level permissioning is being used) and change permissions for all the selected items in a single step. Simply select multiple folders or documents and then select the **Permissions** command, as they do now for a single document or folder.

- If folder-level permissioning is being used (the **Remember selections for future documents and subfolders** exchange setting is enabled), you can copy permissions from any document or folder and apply them to one or more documents or folders.

- If document-level permissioning is being used (the **Remember selections for future documents and subfolders** exchange setting is *not* enabled), you can copy permissions from any document and apply them to one or more documents or folders. (In this case, the permissions will be applied directly to the documents within the selected folders, since the folders themselves cannot be permissioned.)

If you copy and paste permissions, you will overwrite any permissions that were previously assigned to the items on which the new permissions are pasted.

Note: If the **Reviewers and Previewers can add documents to select folders** exchange option has been marked for this exchange, permissions cannot be copied from a document to a folder.

▶ **To copy and paste permissions**

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

1. Highlight the folder or document that has permissions you want to copy.

2. Right-click and select **Copy Permissions** from the menu that appears.

3. Locate the folder or document whose permissions you want to update and highlight it. To select multiple files and folders, press the SHIFT or CTRL key and click on the items you want.

4. Right-click and select **Paste Permissions** from the menu that appears.

About document protections

The permissions that you assign to documents determine who is allowed to access those documents on your exchange. 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 exchange option **enable PDF and Microsoft Office protection** must be selected on the settings screen for your exchange.

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 exchange.

  For PDFs accessed using Internet Explorer — Documents must be viewed on the exchange. 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 exchange.

  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.

Reorganizing exchange content

You can reorganize the new and existing exchange 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 exchange 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 exchange 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	/ \ : * " < > ? |
Document	245	/ \ : * " < > ? | %

▶ **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 or document) 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 2018 Status Reports** is moved to the **2018 Status Reports** folder, which already contains a folder with the same name. Therefore, the name of the newly added folder becomes **October 2018 Status Reports (2)**.

Deleting staged content

You can delete any of the content items displayed in the staging area if the exchange is unfrozen. This includes content that existed on the Intralinks primary service at the start of your Intralinks Designer session if the exchange 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 exchange 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 exchange

You can save a staged exchange without uploading it to the Intralinks primary service.

Note: Do not make changes directly to the exchange using the Intralinks primary service until you have uploaded the changes you have saved.

▶ To save a staged exchange

◇ Press CTRL+S.

If you select another exchange 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 exchange in Intralinks Designer, a message will ask you whether you want to continue working with the copy of the exchange that you saved previously or to make a new copy of the exchange content that currently exists on the Intralinks primary service. If you choose to make a new copy of the exchange, the changes you made previously will be lost.

Working offline

When you save a staged exchange without updating it to the Intralinks primary service, the saved exchange 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 exchanges

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

▶ **To freeze the exchange**

1. Locate the exchange in the folder list on the left side of the staging area. It can be identified by a white cube icon 🔳.(if it is an Intralinks exchange) or a blue cube icon 🔷 (if it is an Intralinks Classic exchange). Right-click on the exchange; a menu appears.

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

   Note: An exchange can be frozen only if indexing is enabled on the exchange.

▶ **To unfreeze the exchange**

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

   ◇ To unfreeze the exchange, 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 exchange. 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 exchange**

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 exchange**

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 exchange 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 exchange. 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 5: Managing exchange users

Overview

Read this chapter for information about:

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

Managing users on your exchange

Using Intralinks Designer, you can add, remove and make changes to users and groups as you stage your exchanges, 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 exchanges.

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 exchange. 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 exchanges" on page 61.

▶ **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 exchange, his or her name, phone number and organization are displayed.

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

3. Select the user's role on the exchange. For more information about roles, see Appendix C, *Users' roles within an exchange*, on page 92.

4. Select a language for the user. When the user logs in, Intralinks or Intralinks Classic will be displayed in the language that you selected here.

5. If the person will be a key contact for the exchange, 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 exchange. 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. (Optional.) If group member roles are used on your exchange, you can assign one or more roles to this user.

   Group member roles describe each member's position within their organization or the function they perform as a member of your exchange.

   Group member roles are in addition to users' exchange roles (reviewer, manager, etc.). Group member roles can be used to define and drive business processes, as well as to organize and control access to your exchange's contents. These roles are optional and need not be assigned to all exchange members or to all members of a group. The group member roles available in your exchange have been preset and cannot be changed.

   It is important to note that a user may belong to multiple groups and may be assigned a different group member role within each of those groups. If this is the case, the user will be assigned tasks only if the group member role assigned to him or her matches your selection here. Similarly, if the user has the same group member role within multiple groups, he or she will be assigned a separate task for each of those groups.

8. 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 user without an email address

If you want to track activities for a person who does not need to use your exchange, you can create a record that does not include the user's email address. To do this, mark the **Placeholder user** option on the **Add User** screen.

Exchange members without an email address cannot log into Intralinks, but you can assign them to groups and business processes, print reports for them and perform other tasks using their records. You might enter a record without an email address if the person will not be using Intralinks, but another user will be performing activities on the person's behalf.

Use the following procedure to add a single user to your exchange. 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 exchanges" on page 61.

Note: In Intralinks Designer, you cannot create two placeholder users whose required information (first name, last name, organization and phone number) is identical. At least one piece of required information must be different.

▶ **To add a user without an email address**

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

1. Click the **New User** button on the toolbar. The **Add User** screen appears.

2. Mark the **Placeholder user** option near the bottom of the screen.

3. Enter the user's name, phone number and organization

4. Select the placeholder user's role on the exchange. For more information about roles, see Appendix C, *Users' roles within an exchange*, on page 92.a

5. Select a language for the user. (Since the user will not be logging into Intralinks, you can select the default language, English.)

6. (Optional.) Add the person to one or more user groups. 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 exchange is set up, the following types may be available:

   • **Exchange groups** — Exchange groups are perhaps the most flexible type of user group for exchange 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 exchange 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** exchange setting is marked (on). Collaboration groups can include members with any kind of exchange role; all the members of the group can see one another regardless of their exchange roles.

   If Intralinks' Q&A function is being used on your exchange, you can use collaboration groups for subject matter experts to whom questions can be delegated.

   Important! All members of collaboration groups, including those with the role of Hidden Manager Plus, are visible to one another, regardless of their exchange 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** exchange 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 Intralinks' Q&A function is being used on your exchange, buyer group members can propose, comment on and submit questions to be answered.

For more information about groups, refer to the *Intralinks User Guide for Managers and Publishers or* the *Intralinks Classic User Guide for Managers and Publishers,* or the Answer Library.

If you want to add a note describing the group, do so. This will appear in on the group's **Properties** screen.

4. (Optional.) Indicate whether a folder that will be used to store documents that are submitted by members of the group using a document submission business process, or that are identified as being owned by the group:

- **None** — Documents will be published to the folder specified in the business process configuration.

- **Use the folder I select below** — Click **Browse** to select the folder that will be used for this group.

- **Create a new folder within the folder I select below based on the group name** — Click **Browse** to select the folder that will contain this group's folder. A new folder will be created within the selected folder; the new folder will be given the name of the group that it is associated with.

These fields are optional; if you do not plan to use document submission business processes or allow groups to own documents, you can skip these fields.

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

Updating custom field values for groups

If your exchange uses custom fields, you can update the custom fields for multiple groups at the same time.

▶ **To update custom field values for multiple groups**

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

1. Highlight the group whose custom fields you want to update. To update custom fields for multiple groups, press the SHIFT or CTRL key while clicking on the names of the groups that you want to select from the groups list on the left side of the screen.

2. Right-click on the selected group(s). From the menu that appears, select **Edit Custom Field Values**. The **Edit Custom Fields** screen appears.

3. Make your changes to the custom field values.

4. Click **Save**.

Importing group information

If you want to add many new exchange 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 53.

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:

    Exchange
    Collaboration
    Buyer

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

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.

- The path of the default folder used to store documents for the group, if any

    If you want to designate an existing folder on the exchange as the default folder for the group's documents, enter the folder path, including the top-level folder and all successive folders that contain the default folder. Folder names should be separated by a slash (/) character. For example, you might enter:

    Taxation/2018 filing/California

    If the group's default folder will be generated when a business process is triggered, enter the path for the folder that will contain the generated

group default folder. For example, if your intent is to create the default group folder within the Municipal Bonds folder, and that folder is within the Bonds folder inside the top-level Investments folder, enter the following:

Investments/Bonds/Municipal Bonds

- Custom field selections (some fields may be required)

  Your spreadsheet must include a separate row for each custom field, and the group name and type must appear in each of these rows. For child fields, be sure to include both the parent field and the value selected for the parent field. (See "Examples of an import file in Excel and CSV format" on page 50 for an example of how this is used.)

  Some custom fields (referred to as "child" fields) become available only when another field (referred to as a "parent" field is selected. These "child" fields provide more detailed information about the option that was selected for the "parent" field. If you import required fields, be sure to import any required "child" fields that are associated with them, as well.

  To see whether any custom fields are required, use the steps in the "To determine whether any group custom fields are required" section below.

▶ **To determine whether any group custom fields are required**

1. Locate the exchange in the folder list on the left side of the staging area. It can be identified by a white cube icon ⬜.(if it is an Intralinks exchange) or a blue cube icon 🟦 (if it is an Intralinks Classic exchange). Highlight the exchange.

2. Click the **Configure Custom Fields** button on the toolbar. The **Configure Custom Fields** screen appears.

3. Locate all the fields that have a field type of **Group**. Fields whose titles are displayed in all uppercase letters (for example, GROUP_TYPE) are required.

The **Options** column displays the entries you can make for these columns. Be sure that your entries on your spreadsheet are identical to the options displayed on the **Configure Custom Fields** screen.

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	Parent custom field	Parent custom field value	Custom field	Custom field value
Legal Team		Exchange		Y				
IRB Members		Exchange		Y				
Auditors		Exchange		N				
Ethics Monitors		Collaboration		Y				
Lifton Associates		Exchange	Review team for our project	Y	Group Category	IRB / EC	Type of IRB / EC	Local
Lifton Associates		Exchange	Review team for our project	Y	Group Category	IRB / EC	Communication Method	Fax

Lifton Associates		Exchange	Review team for our project	y	Group Category	IRB / EC	Street Address	149 Seaside Ave.
Lifton Associates		Exchange	Review team for our project	y	Group Category	IRB / EC	City	Edgeton
Lifton Associates		Exchange	Review team for our project	y	Group Category	IRB / EC	State / Province	MD
Lifton Associates		Exchange	Review team for our project	y	Group Category	IRB / EC	Zip / Postal Code	20015
Lifton Associates		Exchange	Review team for our project	y	Group Category	Locale	Country	United States

Note that multiple rows are needed for the same group if you wish to import settings for multiple custom fields

The same information would appear like this in CSV format:

```
Group name,Group ID,Group type,Group description,Allow
search,Parent custom field,Parent custom field value,Custom
field,Custom field value
Legal Team,,Exchange,,Y,,,,
IRB Members,,Exchange,,Y,,,,
Auditors,,Exchange,,N,,,,
Ethics Monitors,,Collaboration,,Y,,,,
Lifton Associates,,Exchange,Review team for our project,Y,Group
Category,IRB / EC,Type of IRB / EC,Local
Lifton Associates,,Exchange,Review team for our project,Y,Group
Category,IRB / EC,Communication Method,Fax
Lifton Associates,,Exchange,Review team for our project,y,Group
Category,IRB / EC,Street Address,149 Seaside Ave.
Lifton Associates,,Exchange,Review team for our project,y,Group
Category,IRB / EC,City,Edgeton
Lifton Associates,,Exchange,Review team for our project,y,Group
Category,IRB / EC,State / Province,MD
Lifton Associates,,Exchange,Review team for our project,y,Group
Category,IRB / EC,Zip / Postal Code,20015
Lifton Associates,,Exchange,Review team for our project,y,Group
Category,Locale,Country,United States
```

▶ **To add groups using the import process**

Use this procedure to update a single exchange.

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

Be sure that the exchange 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 exchange when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

Copying users from one exchange to another

If the same people are users in two or more of your exchanges, you can copy and paste their information from one exchange to another. Each user's name, organization, phone, email address, status (active or inactive) and exchange role is copied to the new exchange.

▶ **To copy users from one exchange to another**

Display the exchange that contains the users whose information you want to copy. Be sure that the **Users and Groups** tab is selected.

1. Highlight the names of the users you want to copy. You can select multiple users at the same time by pressing the SHIFT or CTRL key while clicking their names.

2. From the **Edit** menu, select **Copy**.

3. From the **Exchanges** list, select the exchange to which the users will be added.

4. From the **Edit** menu, select **Paste**. The users' names and other information appear in the users list.

    Be sure to review each person's exchange role to be sure that it's appropriate for the new exchange. Also be sure to assign publishers and reviewers to user groups so that they will be able to view documents and perform other exchange functions.

5. You can copy the users to additional exchanges if you like. Simply repeat steps 3 and 4 to do so.

Importing information about users

If the information you keep about the people who use your exchange 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 exchange roles, and indicate whether they are a key contact for the exchange(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 56.

These settings will be used if your import file does not contain information for individual users; for example, you can set a default exchange 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 exchange 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.

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

  To create records for placeholder users, enter the word *placeholder* instead of an 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).

- Exchange name (if importing to multiple exchanges)

- Exchange ID (if importing to multiple exchanges)

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

In addition, you can import the following optional information:

- Exchange 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 56.

When creating your import files, you can use any of the following text strings for your users' exchange 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 exchange; 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 exchange yet. Enter one of the following:

  Exchange
  Collaboration
  Buyer

  Note that your exchange's settings must allow collaboration and buyer groups. Exchange groups can be created on all exchanges.

- Each user's language preference

  When creating your import files, use the following text strings for your users' language preferences:

  English
  English (International)
  French
  German
  Japanese
  Portuguese
  Spanish
  Chinese
  Russian

  Note: "English" should be used to assign U.S. English as the user's preference.

- Option to send users an email alert welcoming them to the exchange

  Enter Y or Yes to send a welcome alert; enter N or No if you do not want to send an alert. **Note:** Individuals who have not used Intralinks and are not registered users will receive a welcome alert regardless of your selection here.

- Custom alert text for each user

  If you want to send personalized text to a particular user, enter that text in the spreadsheet. If you do not enter custom text, the user will receive a generic welcome alert.

- Group membership role

  If you are updating an exchange that uses group membership roles (the group member roles enabled exchange setting is enabled), you can import this information. In your spreadsheet, enter the names exactly as they appear in your exchange. If a user will be assigned multiple group membership roles, separate the roles using a comma. Note that you

cannot remove all the group membership roles currently assigned to the members of an exchange; you must make those changes using Intralinks Classic.

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

- Exchange 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 or Intralinks Classic.

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 exchange groups to be created if they appear in your import file but not on your exchange. 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 exchange 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 (exchange, buyer and collaborator, depending upon your how your exchange 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 exchanges:

    If you do not want the records for users who have a particular exchange 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 exchange managers from being removed from your exchanges.

    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 exchanges:

    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 exchange. If you want to update multiple exchanges at the same time, see "Importing information about users to multiple exchanges" on page 61.

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

Be sure that the exchange 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. If your exchange uses custom fields for groups, click the **Edit Custom Fields** link that appears to the right of each group's name. The **Edit Custom Fields** screen appears.

8. 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.

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

10. 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.

11. 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 exchange using the instructions in Chapter 6, *Queuing and uploading your changes to the Intralinks primary service*, on page 65.

If you want to view a list of the changes that were made to the exchange when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

▶ **To remove users using the import process**

Use this procedure to update a single exchange. If you want to update multiple exchanges at the same time, see "Importing information about users to multiple exchanges" on page 61.

For this procedure, your import file should contain information for the users whom you want to *remove* from the exchange or from groups in the exchange. The file must contain the following required fields: each user's phone number; email address; first name; last name; and organization name. To remove users from groups but not the exchange, include the Group ID or Group Name for each group. For information about setting up your import file, see "About your import file" on page 53.

Be sure that the exchange 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 56.

1. Locate the exchange in the folder list on the left side of the staging area. It can be identified by a white cube icon ▢ (if it is an Intralinks exchange) or a blue cube icon ▣ (if it is an Intralinks Classic exchange). Right-click on the exchange; a menu appears.

2. From the menu, select **Remove Users**. 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 **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 exchange using the instructions in Chapter 6, *Queuing and uploading your changes to the Intralinks primary service*, on page 65.

If you want to view a list of the changes that were made to the exchange when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

▶ To synchronize user records using the import process

Use this procedure to update the user records on your exchange 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 exchange, along with any updates that are made to existing records.

Use this procedure to update a single exchange. If you want to update multiple exchanges at the same time, see "Importing information about users to multiple exchanges" on page 61.

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 53.

Be sure that the exchange 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 56.

1. Locate the exchange in the folder list on the left side of the staging area. It can be identified by a white cube icon 🔲.(if it is an Intralinks exchange) or a blue cube icon 🟦 (if it is an Intralinks Classic exchange). Right-click on the exchange; 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 exchange using the instructions in Chapter 6, *Queuing and uploading your changes to the Intralinks primary service*, on page 65.

If you want to view a list of the changes that were made to the exchange when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

Importing information about users to multiple exchanges

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

- Your import file must include the exchange ID and the exchange name for each record that will be changed; if the same individual appears in multiple exchanges, your import file will need to include a separate entry for each exchange.

- 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 exchanges!*** If your import file contains errors that are not found before you import, it is likely that they will appear on your active exchanges.

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

▶ **To add users to multiple exchanges**

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

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 56.

1. If the exchange 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 exchanges when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

▶ **To remove users from multiple exchanges**

For this procedure, your import file should contain information for the users whom you want to *remove* from the exchanges or from groups in the exchanges. The file must contain the following required fields: each user's phone number; email address; first name; last name; organization name; and exchange ID. To remove users from groups but not the exchanges they belong to, include the Group ID or Group Name for each group. For information about setting up your import file, see "About your import file" on page 53.

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 56.

1. If the exchange 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 exchanges are added to the Intralinks Designer queue, where they can be uploaded to the Intralinks primary service.

9. Right-click the Intralinks Connection icon **IL** 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 exchanges.

If you want to view a list of the changes that were made to the exchange when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

▶ **To synchronize user records on multiple exchanges**

Use this procedure to update the user records on your exchanges 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 exchanges, 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 56.

1. If the exchange 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 exchanges are added to the Intralinks Designer queue, where they can be uploaded to the Intralinks primary service.

9. Right-click the Intralinks Connection icon **IL** 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 exchanges.

If you want to view a list of the changes that were made to the exchange when you have finished importing, see "Viewing a report of the changes made during importing" on page 64.

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 exchange 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.

Note that the report shows information for groups only if you are importing information to a single exchange. The report shows information for individual users imported into either a single exchange or to several exchanges.

▶ **To view an import log**

1. Right-click the Intralinks Connection icon **IL** 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 exchange 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 6: 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 exchanges

- 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 exchange to the Intralinks primary service, queue your changes. Once the changes have been queued, you can update your exchange immediately or at a later time.

▶ **To queue an exchange and set permissions for documents**

1. Click the **Add Changes to Queue** button on the toolbar.

2. If you have added documents to your exchange, 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 10.

3. If this exchange uses folder-level permissioning, a message appears to warn you that your changes will override any permissions that were set for the folder that contains the new documents. Click **Override** to continue.

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

5. If you are using folder-level permissioning, click the **Override** option next to each group whose permissions you want to change.

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

   If you are using document-level permissioning, the **Override** option does not appear, and you can go on to the next step.

6. 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 exchange.

Note: The **All Users - Current and Future** option can be used to give all users on the exchange permission to view documents. If you want for every exchange user, including those who have not been added to the exchange yet, to have permission to view the documents in this folder, mark the See box next to the **All Users - Current and Future** option. (Note: If this option has been disabled for your exchange, it does not appear.)

7. 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 exchange 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 exchange.

   Note: The **All Users - Current and Future** option cannot be used to give users permission to control documents. The users must be assigned to a group that has been given control permission, or must have an exchange role (Manager Plus, Hidden Manager Plus, Manager or Publisher Plus) that gives them automatic permission to control all documents on the exchange.

8. Determine whether the documents will be protected.

   If the documents in this exchange are protected (the **enable protection of PDF and Microsoft Office documents** exchange setting is marked), a **Protection** column is displayed. For each permissioned group, you can choose an additional level of security for these documents. Depending upon the type of documents that you are adding, you can either prevent users from downloading copies of the documents or require them to enter their email address and password before viewing a downloaded copy of the documents. You also can prevent users from printing the documents.

   The following document types can be protected:

   – PDF (Portable Document Format)

   – Microsoft Word

   – Microsoft Excel

   – Microsoft PowerPoint

   For each group, select one of the following options from the **Protection** list:

   – **Do not protect** – Choose this option if members of the selected group are allowed to print the documents and to download copies of them to their computer or a network drive.

   – **Protect** – Choose this option to limit users' ability to share the documents. Documents can be downloaded, but the user who downloaded them will be required to enter his or her email address and Intralinks password in order to open the document.

   – **Protect/No Print** – Choose this option if members of the group are not allowed to print the documents or open them without entering their credentials.

Note that if you select **Protect**, viewers will be able to print the documents and share the printed copies with others. If these documents are particularly sensitive, consider the **Protect/No Print** option, which provides a higher level of security.

9. When you have finished setting permissions, click **Apply**.

10. The **Exchange Updater** window opens and the Intralinks Designer main window is refreshed. The exchange list appears, ready for you to select another exchange to modify. Exchanges that are queued are not accessible until processing is complete or they are removed from the queue.

The name of the exchange you selected for updating appears in the **Exchange Updater** window. If you previously queued other exchanges, the most recently queued exchange appears at the bottom of the queued exchange 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 exchange 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 exchange changes**

You may want the selected group to be automatically alerted that the exchange has been modified as soon as you upload it to the primary service (if the exchange 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 exchange content in the email to the users.

Updating additional exchanges

After you have queued an exchange, you can return to the Intralinks Designer main window and select other exchanges that you want to modify. As you finish working with each exchange, 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 exchanges 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 **IL** in the Taskbar Notification Area in the lower right corner of your computer screen.

When you are ready to update your exchanges 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 exchange and click the **Submit** button at the top of the **Exchange Updater** screen.

If the exchange 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 exchange. Because only one exchange is processed at a time, the status for each "submitted" exchange changes to "Ready." When processing is complete or canceled for exchange, processing begins on the next exchange in the queue.

▶ **If you decide not to continue to upload an exchange 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 exchange. 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 exchange upload information.")

Note: You cannot resume processing after canceling the operation.

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

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

1. Select the exchange 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 exchanges that are "Staged" or "Ready" for processing. To do this, select and drag the exchange to another position in the queue.

▶ **To delete staged changes**

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

◇ Select the exchange and click the **Delete** ✖ button. The exchange is removed from the queue.

Viewing exchange upload information

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

As an exchange 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.

After you update an exchange, you can view a list of the uploaded items using the bulk upload smart folder on the Intralinks primary service.

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 exchange 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.

- Another user has frozen the exchange on the Intralinks primary service, preventing you from updating that exchange. Updating continues for the other queued exchanges.

Chapter 7: Downloading and printing information from your exchange

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

- Printing documents

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 exchange and copy them to your computer or a network drive. Using the Download Wizard, you can download all the contents of one or more exchanges, 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 an exchange, the **allow bulk downloading of documents** option on the exchange'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 exchanges to which you have access.

2. Using the **Available** list, locate the items you want to download. Either double-click an exchange's name or click the plus-sign (+) icon to the left of it to view the contents of the exchange. You can view the contents of folders within the exchange in the same way.

3. When you have located an item (exchange, 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 an exchange 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 exchange 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 exchange 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 exchange 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 exchanges.

Place all files in a single folder – All the documents 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 exchange 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 exchange 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 exchange.

Advanced options

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

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 exchange.

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

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.

Always download metadata for documents (Intralinks Platform only) – Mark this option to download the following information about each document downloaded from an exchange: document title; the file's location on the exchange and on the computer or network drive; notes added for the document; the date and time it was created or updated, along with the name of the person who created or updated it; the file type (PDF, for example); its size; and the number of pages in the document. The information will appear in a text file in the same location as the file that was downloaded.

Printing documents that have been uploaded to an exchange

You can select and print multiple documents at the same time. Use the steps below to print the documents in one or more exchanges, documents within selected folders, or individual files. You can select a combination of exchanges, folders and individual files if you like.

▶ **To print documents**

1. If the exchange list is not displayed, select **All Items** from the **Exchange** list near the top of the screen. A list of all your exchanges, templates and working sets is displayed.

2. Click the **Print Content** button on the toolbar at the top of the screen. The Intralinks Bulk Print Wizard appears.

3. Using the **Available** list, locate the items you want to print. Either double-click an exchange's name or click the plus-sign (+) icon to the left of it to view the contents of the exchange. You can view the contents of folders within the exchange in the same way.

4. When you have located an item (exchange, folder or document) that you want to print, highlight it and click the **Add** button. The individual documents that you selected appear in the **Print** list. Continue selecting items until you have selected all the items that you want to print.

5. When you have selected all the documents that you want to print, click **Launch Print**. The **Intralinks Bulk Print Wizard** screen appears.

6. Review the files one last time before printing. Click the **View** link next to a file to open the file. If you decide that you do not want to print a particular file, highlight it and click **Remove Selected**.

7. When you are ready to print the selected files, click **Print**.

A cover sheet will be printed for each document.

Documents whose protections do not allow printing will be skipped. An error will appear for these files on the print report.

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 Placeholder: CTRL+SHIFT+H

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: Exchange settings

Exchange settings determine many of the features that are available on your particular exchange. Other features are determined by the template used to create the exchange and may be tailored to your particular market segment.

All exchange settings also appear on the templates that are used to create exchanges.

The settings described below can be found on the **View/Update Exchange Settings** screen. To display this screen, right-click on the icon for the exchange at the top of the folders list on the left side of the screen, then select **View/Update Settings** from the menu that appears.

General settings

This tab on the **View/Update Exchange Settings** screen displays the name of your exchange, its current phase (hold, preparation or open) and other details that may be important if you need to contact Intralinks customer support.

Using this tab, you can change the name of your exchange and the host (the organization sponsoring the exchange), update the exchange's description and change the phase of the exchange. Other information, such as the exchange number, contract number, organization, business group and template, cannot be changed.

If this exchange is used for Debt Capital Markets and a CUSIP or ISIN number is associated with it, enter that number in the **CUSIP** field. This field is used to associate the CUSIP (Committee on Uniform Security Identification Procedures) or ISIN (International Securities Identification Number) number for a loan or security with the exchange that is used to track the loan or security. These numbers will appear next to the exchanges they are associated with in the exchange list on the **Hub**. They can be used to search for exchanges, as well.

Documents settings

This tab on the **View/Update Exchange Settings** screen displays the options you can use to manage documents and their distribution.

Options

Save deleted documents
The setting determines whether a deleted document is removed merely from view or is removed altogether from the Intralinks system. This setting must be marked if the people using your exchange will use the Historic Filter to view information about the documents that were available in the past.

- If this setting is unmarked (off), deleted documents are removed from the system and cannot be recovered. Both current and prior versions are deleted. Some information about the documents (metadata) is retained, and reports for the documents continue to be available.

- If this setting is marked (on), deleted documents are hidden from view of most users but remain in the system. In this case, deleted documents can

be viewed by users who had rights to modify the documents before they were deleted, but they cannot be updated or permissioned. Once deleted, documents cannot be "undeleted," either by exchange users or Intralinks administrators. All reports for the deleted documents will continue to be available.

Allow bulk downloading

This setting determines whether exchange users are allowed to download more than one document at a time.

- If the setting is marked (on), users are allowed to download multiple documents.

- If the setting is unmarked (off), users can download only one document at a time.

Allow effective dates

This setting determines whether managers and publishers will be able to specify an effective date for each document added to the exchange.

- If the setting is marked (on), managers and publishers can specify effective dates for documents.

- If the setting is unmarked (off), managers and publishers cannot specify effective dates.

Allow owners to be assigned to documents

This setting determines whether you are able to identify a particular user or exchange group as the owner of a document. If you use this function, document ownership information can be used to select documents used by business processes.

You cannot change this setting; it must be changed by an Intralinks employee. If you wish to specify owners for the documents on this exchange, contact Intralinks Global Enterprise Services and request that the setting be changed for that exchange.

- If the setting is marked (on), you can specify document owners on this exchange.

- If the setting is unmarked (off), document ownership is not used on this exchange.

Show creation and modification dates to reviewers

This setting determines whether users can view the date and time each document was added to the exchange, as well as the date and time that it most recently was updated.

- If the setting is marked (on), reviewers and previewers will see date and time information for documents.

- If the setting is unmarked (off), reviewers and previewers will not see date and time information.

Show creator and modifier name to reviewers

This setting determines whether users can view the name of the people who added or updated each document on the exchange.

- If the setting is marked (on), reviewers and previewers will be able to see the names of people who have added or updated documents.

- If the setting is unmarked (off), reviewers and previewers will not see these names.

Save versions

This setting determines whether each version of a document is retained as new updates to the document are posted. This can be useful for auditing and archiving purposes. This setting must be marked if the people using your exchange will use the Historic Filter to view information about the documents that were available in the past.

- If the setting is marked (on), a copy of every version of each document will be saved. All copies will be available for viewing.

- If the setting is unmarked (off), only the current version of each document is retained. Information about each version (who changed the document, and when) is retained.

Allow binders

This setting determines whether users will be allowed to specify a binder when creating or updating documents. Binders allow you to organize documents in different locations either within an exchange or across multiple exchanges.

- If the setting is marked (on), users can specify binders for the documents that they add or update.

- If the setting is unmarked (off), users cannot specify binders for their documents.

Tags

This setting determines whether exchange managers and publishers will be able to assign tags — words or phrases that describe the contents of documents added to the exchange — to documents using the New Document Wizard. Tags can be used to classify and organize information in ways that are meaningful to your organization.

- If the setting is marked (on), users will be able to use tags to describe documents.

- If the setting is unmarked (off), tags will not be available.

Custom fields

Allow metadata to be added

This setting determines whether custom fields are available on your exchange. Like tags, custom fields allow managers and publishers to describe documents in greater detail. Custom fields can be used to enter specific pieces of information, such as expiration dates, internal tracking numbers, and the like.

- If the setting is marked (on), users will be able to use custom fields to describe documents.

- If the setting is unmarked (off), custom fields will not be available.

Indexing

Index folders and documents

This setting determines whether folders and documents will be indexed automatically as they are added to the exchange. For more detailed information about indexing, see "Indexing folders and their contents" on page 26.

- If the setting is marked (on), folders and documents are indexed automatically.

- If the setting is unmarked (off), folders and documents will not be indexed.

Enable document content search

This setting determines whether selected user groups are able to perform only basic searches — that is, searches of document and folder names — or whether they can perform more comprehensive searches, including the contents of documents and any notes that have been entered for them in the New Documents Wizard or on the properties screen for each document.

Permission by

Users and Groups
Groups

This setting determines whether permission to view, download and print documents can be assigned to individual users, as well as exchange groups. The **Groups** setting is marked by default and cannot be unmarked.

Document permissions

Remember selections for future documents and folders

This setting determines whether the permissions applied to a folder's contents apply only to the current documents and subfolders within the selected folder, or to documents and subfolders added in the future, as well. In both cases, the permissions you set can be overridden for selected documents and subfolders.

You cannot change this setting; it must be changed by an Intralinks employee. If you wish to use folder-level permissioning with an existing exchange, contact Intralinks Global Enterprise Services and request that the setting be changed for that exchange.

- If the setting is marked (on), permissions will be remembered and applied to documents and subfolders that are added in the future, as well as to all content in the folder at the time permissions are applied.

- If the setting is unmarked (off), permissions will be applied only to the documents in the folder (and any subfolders) at the time of permissioning. Documents added in the future will not be permissioned automatically.

Allow Reviewers and Previewers to add documents to selected folders

This setting determines whether managers can give reviewers and previewers the ability to add documents to selected folders when the managers set permissions for those folders. This setting can be changed only by an Intralinks administrator.

- If the setting is marked (on), managers who are setting permissions for folders will have the option to allow reviewers and previewers to add documents to the selected folders. If the **Remember selections for future documents and subfolders** option also is marked (on), reviewers and previewers who have permission to add documents to a folder will be able to add documents to subfolders within that folder, as well. This can be overridden for each subfolder.

  When reviewers and previewers add documents, they can send an email alert to other limited publishers with permission to the folder where the new documents are stored. Alerts are sent to all limited publishers with permission to the folder. Reviewers and previewers without limited publisher permission will not receive the alert.

- If the setting is unmarked (off), reviewers and previewers will not be able to add documents to the exchange.

Allow Reviewers and Previewers to create sub folders add documents to selected folders

This setting determines whether managers can give reviewers and previewers the ability to add folders and documents to selected folders when the managers set permissions for those folders. This setting can be changed only by an Intralinks administrator.

- If the setting is marked (on), managers who are setting permissions for folders will have the option to allow reviewers and previewers to add folders and documents to the selected folders. If the **Remember selections for future documents and subfolders** option also is marked (on), reviewers and previewers who have permission to add documents to a folder will be able to add documents to subfolders within that folder, as well. This can be overridden for each subfolder.

  When reviewers and previewers add documents, they can send an email alert to other limited publishers with permission to the folder where the new documents are stored. Alerts are sent to all limited publishers with permission to the folder. Reviewers and previewers without limited publisher permission will not receive the alert.

  Reviewers and previewers will be able to edit the name and set custom field values for the folders that they have created.

- If the setting is unmarked (off), reviewers and previewers will not be able to add folders and documents to the exchange.

Allow Reviewers and Previewers to edit custom fields to selected folders

This setting determines whether managers can give reviewers and previewers the ability to edit custom field values for selected folders when the managers set permissions for those folders. This setting can be changed only by an Intralinks administrator.

- If the setting is marked (on), managers who are setting permissions for folders will have the option to allow reviewers and previewers to edit custom field values for the selected folders. Reviewers and previewers will not be able to change other folder attributes, such as the folder name. If users also are granted the ability to add subfolders to the selected folder, they will be able to set the values for those folders' custom fields.

- If the setting is unmarked (off), reviewers and previewers will not be able to edit custom field values for folders.

Document protection

Require authentication for downloaded PDF and Microsoft Office documents

This setting determines whether exchange managers or publishers who add documents to the exchange can apply various types of protection to them. This includes requiring users to enter their Intralinks ID and password before viewing documents and preventing users from printing protected documents. Documents in PDF (Portable Document Format) and Microsoft Word, Excel and PowerPoint documents can be protected.

- If the setting is marked (on), document protection can be applied to PDF and Microsoft Office documents.

- If the setting is unmarked (off), document protection functions are not available on this exchange.

Do not allow documents to be printed

This setting is available only if **Require authentication for downloaded PDF and Microsoft Office documents** is marked.

- If the setting is marked (on), users cannot use the **Print Screen** button while viewing this exchange.

- If the setting is unmarked (off), users are allowed to use the **Print Screen** button to capture images of this exchange and its contents.

Bind user's Intralinks ID to 1st computer used when viewing

This setting is available only if **Require authentication for downloaded PDF and Microsoft Office documents** is marked. This setting determines whether exchange users will be able to work with protected documents on more than one computer, or only on a single computer.

- If the setting is unmarked (off), users will be able to view protected documents on any computer that they may use to access this exchange.

- If the setting is marked (on), users will be able to view protected documents on only one computer — the first computer they use to access a protected document on this exchange.

Plugin-free IRM protection

This setting can be changed only by an Intralinks administrator. Once this setting is marked, it cannot be unmarked.

This setting determines whether Intralinks' IRM document protection solution will be used to protect Microsoft Office and PDF (Portable Document Format) documents.

- If the setting is unmarked (off), document protection functions will not be available on the exchange.

- If this setting is marked (on), document protection can be applied to PDF and Microsoft Office documents.

Watermarking

Apply for:

This setting determines whether documents that are viewed or downloaded will be stamped with a watermark containing the exchange user's name and organization, the date and time the document was viewed, and other text, such as "Confidential" or "Final." You can choose to apply watermarks only to protected PDF documents or to all PDFs.

- If the setting is unmarked (off), no watermarks are applied to documents.

- If the setting is marked (on) and watermarking is selected for all PDF documents, watermarks will be applied to all PDF documents on this exchange.

- If the setting is marked (on) and watermarking is selected for protected PDF documents only, watermarks will be applied to protected PDF documents on this exchange. If this setting combination is chosen, the **enable protection of PDF and Microsoft Office documents** setting must be marked, as well.

You can select the information that will appear in watermarks.

Include user's name

Mark this option if you want the name of the person who viewed or printed the document to appear in the watermark.

Include organization

Mark this option if you want the name of your organization to appear in the watermark.

Include date and time of viewing

Mark this option if you want the time the document was downloaded to appear in the watermark. The time displayed is Greenwich Mean Time (GMT).

Include text label

If you want an additional text label, such as "Confidential" or "Draft," to appear in the watermark, mark this option, then select the text label you want. If the label you want does not appear in the list, select **use typed in text** and then enter the label in the box below the text label list.

Text label

If you marked the Watermark text label option, select the label you want to use. If the label you want does not appear in the list, select use typed in text and then enter the label in the box that appears.

Color

You can select to display watermarks in one of the following colors: red, green, gray, blue, black, brown.

Intensity

You can select the intensity, or opaqueness, with which watermarks will be displayed on your documents. Select from five levels; Level 1 is the lightest, and Level 5 is the darkest, or most opaque.

Position

Header & footer

Mark this option to display the watermark at the top and bottom of each page of your documents.

All four corners

Mark this option to display watermarks in each corner of your documents.

Center

Mark this option to display the watermark at the top and bottom of each page of your documents.

Watermark all

Mark this option to display watermarks in the center, the header and footer, and each corner of your documents.

Users and Groups settings

Options

Allow self removal

This setting determines whether exchange users can remove themselves from the exchange.

- If the setting is marked (on), users will be able to remove themselves from the exchange if they no longer plan to participate in it.

- If the setting is unmarked (off), users will not be allowed to remove themselves from the exchange, and the **Remove Me** option will not appear on the **Actions** menu in the **Hub** when this exchange is highlighted.

Allow concurrent logins

This setting determines whether exchange users can log into Intralinks more than once simultaneously.

- If the setting is marked (on), users will be able to log into Intralinks more than once simultaneously using the same user ID and password.

- If the setting is unmarked (off), users will be able to log into only one Intralinks session at any given time. (Note, however, that Intralinks administrators can override this setting for an individual user by changing a setting on the user's profile screen.)

Disable all user permissioning

This setting determines whether the All Current and Future Users group will be available for this exchange. The All Current and Future Users group provides you with an easy way to give all exchange users access to documents that do not require permissions controls.

Members of the All Current and Future Users group will be able to view documents, but will have no other capabilities. If you want specific users to be able to modify documents, you will have to give them permission to control the documents separately.

You cannot change this setting; it must be changed by an Intralinks employee. If you wish to disable (or re-enable) the setting for this exchange, contact Intralinks Global Enterprise Services and request that the setting be changed.

- If the setting is marked (on), the All Current and Future Users group is disabled, and is not available for use.

- If the setting is unmarked (off), the group is available for use.

Groups

Enable group member roles

This setting determines whether group member roles will be used with this exchange. If this option is selected, users can be assigned a group member role that describes their position within their organization or the function they perform as a member of your exchange. Group member roles can be used to define and drive business processes and naming convention rules, as well as to organize and control access to your exchange's contents. These roles are optional and need not be assigned to all members of a group. Group member roles are in addition to users' exchange roles (reviewer, manager, etc.).

Group member roles must be identified on the templates used to create your exchanges. This functionality must be enabled or disabled by an Intralinks administrator, and changes to the roles must be made by Intralinks. Intralinks Global Enterprise Services team members will work with your organization to define group member roles to help expedite your business processes. If this function is enabled, a new tab appears on each user's **Properties** screen, allowing you to select the user's group member role.

- If the setting is marked (on), group member roles are being used for this exchange.

- If the setting is unmarked (off), group member roles are not available for this exchange.

Exchange groups
This setting is marked by default in all exchanges and cannot be unmarked. Exchange groups are required in order for users to view documents on your exchanges.

Collaboration group
This setting typically is used with Intralinks' Q&A functionality. It determines whether collaboration groups are available on your exchange. Collaboration groups enable members of your organization to communicate with one another while using your exchange. They also are used to delegate buyers' questions to subject matter experts within the organization if you are using Intralinks' Q&A function in the exchange. Once this setting is enabled for an exchange, it cannot be turned off.

- If the setting is marked (on), you will be able to create collaboration groups using the Add Group Wizard.

- If the setting is unmarked (off), you will not be able to create collaboration groups on the exchange, and you will not be able to delegate users' questions to subject matter experts within your organization.

Buyer group
This setting determines whether buyer groups are available on the exchange. It typically is used with Intralinks' Q&A functionality. Members of a buyer group can view one another's comments. Buyer group members must have an exchange role of Previewer or Reviewer; a user can be a member of only one buyer group. Once this setting is enabled for an exchange, it cannot be turned off.

- If the setting is marked (on), you will be able to create buyer groups using the Add Group Wizard.

- If the setting is unmarked (off), you will not be able to create buyer groups on the exchange.

Alerts

Alert users who are removed from the exchange
This setting determines whether email alerts will be sent to exchange members who are removed from the exchange, to alert them that they have been removed.

- If the setting is marked (on), an alert will be sent to users when they are removed from the exchange.

- If the setting is unmarked (off), no alert will be sent to users when they are removed from the exchange.

Suppress remove me alerts
This setting is used only in the creation of Intralinks Courier exchanges. It does not have any effect on your exchange and cannot be changed.

Advanced settings

Show exchange welcome screen

This setting determines whether email alerts can be sent to exchange users when you change the exchange phase to a phase that makes the exchange visible to these users.

- If the setting is marked (on), email alerts will be sent to users when the exchange becomes visible to them.

- If the setting is unmarked (off), no welcome alerts will be sent.

Allow access by Intralinks administrators

This setting allows security-conscious managers to control Intralinks administrators' access to exchange content. This command appears only if it was enabled on the template used to create your exchange.

- If the setting is marked (on), Intralinks administrators have the ability to see all information on exchanges created using this template.

- If the setting is unmarked (off), you have the option to block Intralinks administrators from viewing exchange content; administrators still will be able to view the exchange name and settings. You can turn the exchange setting on and off as your needs require.

Regardless of how this setting is set, Intralinks administrators are able to view your templates and business group information.

Open Intralinks Designer from within the exchange

This setting determines whether exchange managers will be able to access Intralinks Designer from within the exchange. Intralinks Designer is a tool that enables managers to upload and manage content and users en masse. If this setting is not marked, managers can use Intralinks Designer, but they will have to start it using selections on the Microsoft Windows **Start** menu.

- If the setting is marked (on), managers will be able to access Intralinks Designer from within the exchange.

- If the setting is unmarked (off), Intralinks Designer will not be available within the exchange.

Enable renaming rules

This setting determines whether you are allowed to use naming convention rules to ensure that document names on this exchange conform to your organization's standard operating procedures.

You cannot change this setting; it must be changed by an Intralinks employee. If you wish to use naming conventions with this exchange, contact Intralinks Global Enterprise Services and request that the setting be changed for that exchange.

- If the setting is marked (on), naming conventions can be used to rename documents added or updated on this exchange.

- If the setting is unmarked (off), naming conventions are not used on this exchange.

Save deleted conversations

Comments can be added to multi-task business processes and the business process instances created from them. This setting allows you to save a copy of these comments for audit purposes if they are deleted.

If this setting is unmarked (off), deleted comments are removed from the system and cannot be recovered.

If this setting is marked (on), deleted comments are hidden from view of most users but remain in the system. In this case, deleted comments can be viewed by users who had rights to view or participate in the conversations before they were deleted,

but comments cannot have additions comments posted to them. Once deleted, documents cannot be "undeleted," either by exchange users or Intralinks administrators. Reports for the deleted comments will continue to be available.

Enable E-forms

This setting determines whether Intralinks eForms functionality is available in this exchange. eForms are PDF forms that are used to collect information from business partners and post it to your Intralinks exchange.

You cannot change this setting; it must be changed by an Intralinks employee. If you wish to use e-forms with this exchange, contact Intralinks Global Enterprise Services and request that the setting be changed for that exchange.

- If the setting is marked (on), you can use eForms to publish information in this exchange.

- If the setting is unmarked (off), eForms are not available for this exchange.

Enable OCR

This setting determines whether graphic images that contain text and PDFs created from images will be scanned by an optical character reader when they are uploaded to your exchange. This function allows users to find these documents using Intralinks search tools. If you use this function, the text is attached to the scanned documents as metadata; the contents of the files are not changed in any way.

- If the setting is marked (on), PDF documents and graphic images that contain text will be scanned when they are added to your exchange, and this text will be made available to Intralinks' search engine.

- If the setting is unmarked (off), PDF documents and graphic images will not be scanned when they are uploaded.

Require public/private declarations

This setting determines whether reviewers and previewers on your exchange will be required to declare themselves as either public-side users — excluded from viewing non-public material ("private") content — or private-side users who are eligible to see both public and private information. (Users with exchange roles other than reviewer and previewer are marked private automatically.) Standard permissioning rules continue to apply to the contents of public/private-enabled exchanges; users who are not permissioned to use a particular document will not be able to access it, regardless of their declaration.

This setting is available only for Debt Capital Markets (DCM) exchanges.

- If the setting is marked (on), reviewers and previewers will be required to make a public/private declaration when entering this exchange for the first time, and users who declare themselves public (or who are declared public by an access monitor) will not be able to view documents containing private content.

- If the setting is unmarked (off), reviewers and previewers will not be asked to make a public/private declaration, and documents will not be designated as public or private.

Send reminder to undeclared users

This setting determines whether an email alert will be sent to users who have not made a public or private content declaration, asking the users to make a declaration. This setting is available only if the **Public/private** exchange setting is marked (on).

This setting is available only for Debt Capital Markets (DCM) exchanges.

- If the setting is marked (on), a reminder alert will be sent to undeclared users every week. This alert will be sent regardless of the user's alert preferences.

- If the setting is unmarked (off), no reminder alerts will be sent to undeclared users.

Workflow

Enable the creation and management of tasks

This setting determines whether exchange users will be able to set up business processes for requesting and submitting documents for review and approval.

- If the setting is marked (on), users will be able to set up and use workflows.

- If the setting is unmarked (off), business processes will not be available.

Q&A

Enable Q&A

The setting determines whether Q&A functionality is available on the exchange.

- If the setting is marked (on), buyers will be able to ask questions and coordinators in your organization will be able to answer the question or delegate it to subject matter experts. You also will be able to create FAQ entries from questions that will be visible to all buyers.

- If the setting is unmarked (off), Q&A functions will not be available.

Buyer question limit

This setting appears only if the **Q&A module** setting is marked (on). The **Question limit** setting provides a default entry for new buyer groups as they are created; you can choose to limit the number of questions each group can ask (using a different limit for different groups if you like) or to allow buyers to ask an

unlimited number of questions. On this screen, enter a numeric value or leave it blank if there is no limit.

Enable Q&A Coordinator role

This setting is available only if the **Enable Q&A** setting is marked (on). Note that this setting enables the *limited* Q&A coordinator role. When this setting is enabled, the Reviewer Plus role (if it has been enabled) will be replaced with the new coordinator role. If existing users have been assigned the Reviewer Plus role, they will lose that role.

Once this exchange setting has been enabled, it cannot be disabled again.

The limited Q&A coordinator role must be assigned to users; it is not assigned automatically. Users selected to be limited Q&A coordinators cannot be members of collaboration groups.

Users with this role can answer and delegate questions; they also can freeze and unfreeze Q&A categories. They *cannot* perform the following tasks:

- Create documents

- Create folders

- Update user permissions

- Select buyers to be question submitters for their buyer group

- Add, update or remove users from the exchange

- Add, update or delete groups

- Add or remove users from groups

- Set question limits

These tasks must be performed by a Q&A coordinator with the Manager Plus exchange role. (Some tasks can be performed by a user with a manager-level or publisher-level exchange role.)

M&A advisors who act as Q&A coordinators and exchange managers use the limited Q&A coordinator role to delegate some authority to their clients without providing managerial access to the exchanges that they manage. The limited Q&A coordinator role provides greater visibility into the clients' deals than the subject matter expert (SME) role does.

Geo specific mount point

This setting determines whether the data on this exchange is stored in the United States or in the United Kingdom. This option was set on the template used to create the exchange, and it cannot be changed for the exchange. Note that full-text search is not available for documents stored in the United Kingdom, though general information about the documents (metadata) will be available for searching. File processing will be performed in the United States, but apart from temporary processing, UK-based documents will not be stored in the United States.

Splash

You can create a splash screen that appears when users enter your exchange. Depending upon your selections, the splash screen will appear every time a user enters the exchange, only the first time the user enters the exchange, or never.

The following fields appear on the **Splash** tab of the **View/Update Exchange Settings** screen:

Options

Select one of the following options:

- **No splash** — No splash screen is displayed; the exchange is displayed automatically.

- **One-time splash** — The splash screen is displayed only the first time that a user enters an exchange. Once the user clicks **Accept** or **Continue** to acknowledge that he or she has viewed the screen, it will not be displayed again.

- **Every session login** — The splash screen is displayed every time the user enters the exchange.

Image

If you want to include an image on the splash screen, click the **Browse** button to select the image file. Images must be in GIF or JPEG format.

You also can add a URL, making the image a clickable hyperlink. For example, if you insert your logo, you can include the URL for your corporate website; when users click the logo, your website will be displayed in a new browser window. If you click **Add URL**, the **Image URL** field will be displayed, and you can type or paste the URL in the field. Click the **Test URL** button to be sure that the URL you entered displays the webpage that you want.

Note

Enter your non-disclosure agreement or other note. The note can be up to 35,000 characters long.

Button

Select one of the following options:

- **Agree** — Select this option if the text that you included is a non-disclosure agreement or other legal text that requires the user's acceptance before the exchange is displayed.

- **Continue** — Select this option if the text does not require the user's acceptance (for instance, the text is informational only) in order for the exchange to be displayed.

Footer

The footer always appears at the bottom of your exchange, regardless of the screen that is displayed. Footers typically are used to provide branding and links

to information elsewhere on the Internet that is relevant to your exchange users. Bear in mind that all users, regardless of their exchange role, can see the footer, so avoid including links that are inappropriate for some groups within the exchange. In addition, the footer provides contact information for Intralinks customer support; this information cannot be removed or changed.

You can add up to five images and up to three text phrases. You can make both the images and the text phrases hyperlinks if you like.

Image

If you want to include an image to the footer, click the **Browse** button to select the image file. Images must be in GIF or JPEG format, and they must be 65 x 25 pixels or smaller. You can add up to five images.

You also can add a URL, making the image a clickable hyperlink. For example, if you insert your logo, you can include the URL for your corporate website; when users click the logo, your website will be displayed in a new browser window. If you click **Add URL**, the **Image URL** field will be displayed, and you can type or paste the URL in the field. Click the **Test URL** button to be sure that the URL you entered displays the webpage that you want.

Text

If you want to add a text phrase, type it in the **Text** field. You can add up to three text phrases. The combined length of all text phrases must be 85 characters or less.

You also can add a URL, making the text phrase a clickable hyperlink. When users click the phrase, the selected website will be displayed in a new browser window. If you click **Add URL**, the **Text URL** field will be displayed, and you can type or paste the URL in the field. Click the **Test URL** button to be sure that the URL you entered displays the webpage that you want.

Appendix C: Users' roles within an exchange

Exchange roles determine each user's rights and responsibilities within an exchange. Users who are active in a number of exchanges may have a different role within each exchange.

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

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

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

Publishers — Publishers assist managers by adding documents to the exchange. They may be responsible for setting permissions for the documents — that is, identifying the exchange 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 exchange.

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

Manager exchange roles

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

Manager roles include:

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

Hidden Manager Plus – This exchange role is nearly identical to that of manager plus, but these managers will be hidden from users with publishing and reviewing exchange 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 exchanges that use Q&A. This role sometimes is abbreviated as "(manager+)."

Manager – This exchange 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 exchange 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 exchange roles

Exchanges can have up to two types of publishing exchange roles — though it is possible for an exchange 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 exchange's life cycle.

Publisher exchange roles include:

Publisher Plus – This exchange 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 exchanges settings for the footer and splash screen, and can change the exchange's phase. People with this role can see all other users (except those with the hidden manager plus exchange role) and can be seen by all other users.

Publisher – People with this exchange 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 exchange roles

Exchanges can have up to three types of reviewer exchange roles. These roles include:

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

Previewer – People with this exchange 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 exchange's life cycle; they often are members of the organization hosting the exchange. 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 exchange.

Reviewer – People assigned this exchange role have the same rights as previewers, but are active only during the open phase of the exchange's life cycle. Reviewers generally are members of organizations other than the organization hosting the exchange. In a typical exchange, 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 exchange.

Appendix D: Intralinks Cleanup Utility

In rare instances you may find that a problem occurs while you are using Intralinks Designer and you need to close the application and stop all associated processes. In other cases, you may need to remove locally stored data that is associated with Intralinks Designer. This can arise, for example, if the log files that are associated with Intralinks Designer become very large, affecting the performance of the application.

The Intralinks Cleanup Utility does not affect the contents of your exchanges on the Intralinks primary service, but log files, changes that have been staged and saved but not yet uploaded to the primary service, user profiles and temporary files created by Intralinks Designer may be removed from your computer.

Important! Before you use the Intralinks Cleanup Utility, be sure to exit all Intralinks applications. If you are using the Intralinks Courier plug-in for Microsoft Outlook, close Outlook, as well. If you do not do so, the Cleanup Utility will not be able to complete the cleanup process.

▶ To run the Intralinks Cleanup Utility

If you have not closed Intralinks Designer, Intralinks Courier, Microsoft Outlook and any other Intralinks applications that you are using, do so now.

1. From the Windows **Start** menu, choose **All Programs** > **Intralinks** > **Intralinks Designer** > **Cleanup Utility**. A message appears requesting that you close all Intralinks applications.

2. After you have closed all Intralinks applications and Microsoft Outlook, click **Continue**. A second message appears describing the information that will be removed from your computer.

3. Click **Continue**. The Cleanup Utility halts all processes associated with Intralinks Designer and removes locally stored data. When cleanup is complete, a message appears.

4. Click **Close** to exit the utility. Or click **Open Intralinks Designer** if you wish to exit the utility and restart Intralinks Designer.

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