Intralinks Guide
to M&A Dashboards
and Reports

For M&A Managers
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Chapter 1: Welcome

Welcome to Intralinks®, the premier tool for secure online collaboration between organizations.

Intralinks is designed to be easy to use, and we’ve included many tools to make your Intralinks experience even more productive.

This guide is part of a collection of user guides created for M&A exchange managers, publishers, and reviewers. All guides in this collection are available on the Resources page of the Intralinks Academy website: https://ilearn.intralinks.com/iIDSResources.html.

Guides for M&A Managers and Publishers

• Intralinks Getting Started Guide
• Intralinks Guide to Setting Up M&A Exchanges
• Intralinks Guide to Managing Members and Groups in M&A Exchanges
• Intralinks Guide to Publishing and Permissioning M&A Documents
• Intralinks Guide to M&A Dashboards and Reports
• Intralinks Workflow Configuration Guide

Guides for M&A Reviewers

• Intralinks User Guide for M&A Reviewers

Q&A Guides

• Intralinks Q&A Setup Guide
• Intralinks Q&A Guide for Buyers
• Intralinks Q&A Guide for Coordinators
• Intralinks Q&A Guide for Experts

System requirements

In order for you to use Intralinks, your computer must meet the following minimum standard:

• **Windows and Macintosh operating systems:** No specific requirement, but must be able to support a supported Web browser
  
  **Note:** Windows PCs must have a 32-bit processor and a minimum of 512 MB of RAM, 10 MB of available disk space and a 1 GHz CPU (central processing unit)

• **Web browsers:** Microsoft® Internet Explorer 11.x and later, latest version of Microsoft Edge, Latest version of Apple® Safari®, Mozilla® Firefox® or Google Chrome™

• **PDF viewer:** Adobe® Acrobat® or Adobe Reader®
Microsoft is either a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries. Mozilla and Firefox are registered trademarks of the Mozilla Foundation. Macintosh and Safari are registered trademarks of Apple Inc. All other service, product and/or brand names are the property of their respective owners.

Getting answers online

If you need assistance, the Intralinks Help Center is your online resource for finding answers to questions that may arise as you work with your Intralinks exchanges. To open the Help Center, click Support & Feedback in the upper-right corner of the screen, and click Help Center. The Help Center provides links to user guides, training videos, live help chat, and a fully searchable library of help topics.

You can browse topics in the answer library—the most popular topics appear first in the list—or you can search for specific words and phrases.

Intralinks also provides award-winning live phone support. If this guide and the Answer Library don’t answer your question, give us a call! Local telephone numbers for Intralinks Client Services can be found at:

http://www.intralinks.com/contact/client-services
Chapter 2: Using the Data Room Insights dashboard

About the Data Room Insights dashboard

The Insights dashboard provides at-a-glance insights into buyers’ data room activity, making it easy for M&A managers to determine which buyers are most actively using the data room and focus attention on them. Only users with the Manager Plus role can view the Insights dashboard.

The dashboard includes a graph that shows the 10 most active groups within the data room. Activity is displayed as a percentage and is based on the total number of times group members have visited the data room, along with the number of times these people have viewed or downloaded documents from the data room. Activity is calculated for both buyer groups and reviewers within exchange groups.

The **Group Rankings** section of the dashboard shows more detailed information about all the groups in the data room, including the percentage of data room activity each group accounts for and the number of data room visits and document accesses (views and downloads) by members of each group. Arrow icons indicate whether each group was more or less active in the selected timeframe, compared to their overall activity since joining the exchange. Changes in activity can indicate growing or waning interest in a deal.

You can view details for each of the groups, including the most active users within each group and the documents viewed or downloaded most often by the groups. You can drill down to view the 5 most active members in each group, along with details about the documents these members have viewed and downloaded.

Information on the dashboard is updated once every 24 hours.

How the dashboard information is calculated

Here are some key points to remember when viewing the information in this dashboard:

- If a user is included in two (or more) groups, the user’s activity will be included in the activity for both groups.

- Only one visit is counted per session. A session lasts from the time a group member logs into Intralinks until the group member logs out, closes the browser or is inactive for an hour or more and is logged out automatically.

- The “Documents accessed” count is updated whenever a group member views or downloads a document. If a user views the same document twice, that is counted as two accesses. When IRM-protected documents are downloaded, Intralinks continues to track the number of times they are viewed, and each time an IRM-protected document is opened, the “Documents accessed” count is updated. When documents that are not IRM protected are downloaded, the “Documents accessed” count is updated once for the download only; subsequent viewings are not tracked or reported.
• When exchange groups include people with a variety of roles, only the accesses by people with the Reviewer role are counted. This is to ensure that all buyer activity is included, but activity from other data room members is limited.

Using the Data Room Insights dashboard

► To display and use the Insights dashboard

Note: The Data Room Insights dashboard is available only to users with the Manager Plus exchange role.

◊ From within the exchange, select the Insights tab at the top of the screen. The Data Room Insights screen appears.

You can use filters to display information for shorter or longer timeframes. This can help you to determine the groups that are most active this week, for example. Using this information, you can make judgments about each buyer group’s level of interest in your deal, and whether groups that show interest in the first weeks of the deal continue to show interest as the due diligence process continues. The following filters appear on the upper right side of the Data Room Insights screen:

• 24 Hours
• 7 Days
• 30 Days
• 3 Months
• All

The range of dates included in each timeframe option is displayed in the selection list. If data is not available for a particular timeframe option, that option will be dimmed. Once you have made a selection, the range of dates included in the selected timeframe appears at the top of the screen, just below the Activity Summary by Group heading.

Keep in mind that the data on the dashboard is updated once every 24 hours, and the filtered information is accurate as of the last update. Activity that occurs after the most recent dashboard update will be included the next time the dashboard is updated.

► To export the information shown on the Insights dashboard to a Microsoft Excel worksheet

◊ On the Data Room Insights screen, click the Export to Excel link in the upper right corner of the screen.
Chapter 3: Viewing document reports

Introduction

Intralinks provides several reports that help you make the most of the time you spend in your exchange. The following reports provide information about documents.

- Document and folder list
- Document history report
- Deleted documents report

Viewing a list of folders and documents on the exchange

You can display and print a printer-friendly view of your exchange’s Document List, which provides a detailed view of folders and documents on the exchange.

▶ To display a printer-friendly view of the Document List

1. From within the exchange, display the Documents screen.
2. From the Action menu, select Print Document List. A new browser tab opens displaying a list of all the folders and documents on the exchange in a format that is suitable for printing.
3. (Optional.) Click Print to print the list.

Viewing history information for documents

Use the Document History Report to see an audit trail for a selected document. The report shows information about when the document was added to the exchange, changes to permissions, updates to the document or the document’s properties, views by people, and instances where the document was moved. If you are viewing a deleted document, the report includes information about the document’s deletion.

▶ To display the Document History Report

1. From within the exchange, display the Documents screen.
2. Select the document whose access information you want to view.
3. From the Action menu, select Properties, and then click History. The History view appears with a list of all actions performed on the document.
4. If you want to view a smaller range of information, enter a date in the Since field. To view a single type of action (such as changes to permissions), choose the action you want from the Activities list.
5. If you want to view more details about the document, click Alerts, Permissions, and Properties to display those views.
6. (Optional.) To export the document’s history information in table format to a Microsoft Excel spreadsheet, click Export.
7. When you have finished viewing the report, click Cancel.
Viewing a list of deleted documents

You can view a list of deleted documents on your exchange. If the save deleted documents option is enabled for your exchange and you modified a document before it was deleted, you can click the document to view and print it. (Documents that have been protected to prevent printing cannot be printed.)

To view a list of documents that have been deleted from your exchange

1. From within the exchange, display the Documents screen, then click the search filter icon 🔍.
2. Mark the Deleted Documents option.
3. (Optional.) If you want to restrict the deleted documents list to only those documents that have not been read, mark the Unread Documents option.
4. Click Apply. A list of documents that have been deleted is displayed.
5. To create a Microsoft Excel spreadsheet containing the currently displayed information, select Export This View from the Action menu. You can print the spreadsheet using Excel.
Chapter 4: Tracking member activity

Introduction

The following reports provide information about document access by exchange members and groups.

- Document access report
- Access report for users and groups
- Exporting a list of people on the exchange

Access Reports for documents

As a manager, you can view access reports for documents to learn how group members are using the documents in the exchange. The report shows which people have access to a selected document, the number of times they have viewed, downloaded and printed the document, the date they last looked at the document, and the version of the document they most recently viewed.

➤ To display the access report for a document

1. From within the exchange, display the Documents screen.
2. Select the document for which you want to view access information.
3. From the Action menu, select Access Report.
4. (Optional.) To export the information that appears on the report to a Microsoft Excel spreadsheet, click Export.
5. When you have finished viewing the report, click Cancel.

Access Reports for users and groups

Access Reports for users and groups provide a view of the documents that selected groups or users are accessing most often. These reports are presented in a tabular format. You can print the report for multiple groups and perform side-by-side analysis of the groups’ or users’ document usage.

Access Reports capture information about document activities, including viewing, printing and permissions. You also can view the most recent date on which selected members of the selected group or groups viewed particular documents.

➤ To view, export and print an Access Report for users or groups

1. From within the exchange, display the Users and Groups screen.
2. Select the user(s) or group(s) whose information you want to view.
3. From the Action menu, select Access Report. The Access Report screen for the selected user(s) or group(s) appears.
4. To view a shorter list of documents, use the search field and filter menu at the top of the screen. You can search for documents by name, or filter the list by category.
5. When you are ready to print the report, click Export. The report is created in table format in a Microsoft Excel spreadsheet.

6. In Excel, from the File menu, select Print. A print dialog box appears.

7. Select your print options and click Print.

Exporting a list of people on the exchange

Intralinks’ reporting capability makes it easy to see trends in groups’ exchange usage and evaluate their level of interest in particular issues. For example, if a group of buyers is very active when they join the exchange but their level of activity drops, this may be an indication that their interest in your asset is low. If a group is consistently active, viewing many documents on an ongoing basis, their level of interest probably is higher, and they may deserve extra attention from your organization.

At other times, you may simply need to manage the exchange, and a comprehensive user list can assist you in performing management tasks. You can export a list of all exchange members (or a subset of the list) to Microsoft Excel, where you can manipulate and print the information.

▶ To export and print a list of all people in an exchange

1. From within the exchange, display the Users and Groups screen.

2. From the Action menu, select Export Users and Groups List. An Excel file is generated and downloaded to your computer.

3. Click the downloaded file to display the list in Excel.

4. If you want to print the list, select Print from the File menu in Excel.

5. Select your print options and click Print.

▶ To export and print a list of people who currently appear in the User List

1. From within the exchange, display the list of people you want to export.

2. From the Action menu, select Export this View. An Excel file is generated and downloaded to your computer.

3. Click the downloaded file to display the list in Excel.

4. If you want to print the report, select Print from the File menu in Excel.

5. Select your print options and click Print.
Chapter 5: Viewing exchange activity

Introduction

Most Intralinks reports provide insight into how user groups are making use of the exchange. The advanced reports available from the Reports tab are especially useful in understanding how buyers are using your exchange, but more importantly, they can give you insight into the buyers’ level of interest in your deal, particular aspects of the deal that concern them most, and information that buyers are seeking. As you analyze all this information, you should begin to develop a clearer picture of where to apply focus to move your deal forward.

Intralinks provides the following reports, which show information about the documents accessed by particular people or groups:

- Activity summary
- Exchange statistics summary
- Folder coverage
- Search summary
- User activity by group
- Q&A activity
- Submitter activity

Activity Summary Report

The Activity Summary Report provides insights into whether particular groups of members are actively using the documents on your exchange and whether their level of activity is ongoing. The report identifies the groups who are most (and least) actively viewing documents on the exchange. Very active groups might be viewed as more interested in the asset being sold than less active groups are.

Note that the report is based on the documents that are available to each group. Documents to which a group is not permissioned are not included in the analysis of their usage. In some cases, one group may have more total accesses but a lower percentage than another group. This simply means that the first group was given access to a larger number of documents but viewed a lower percentage of them than the second group did.

► To view, export and print the Exchange Activity Summary Report

You can generate this report for exchange members or groups.

1. From within the exchange, display the Reports screen.
2. Click Activity Summary. The Activity Summary screen appears.
3. Click the filter icon at the top of the screen to select report options:

   Chart Type – Select Over Time if you want to see whether people’s interest is sustained over a long period of time, is increasing, or is waning. A line graph shows the percentage of all available documents that group members or individuals have viewed over the specified period of time. Viewing, printing
and downloading documents are examples of accesses that are included in this report.

Selecting the Total view displays a bar graph that shows aggregated information. It provides a quick snapshot of overall interest during the selected time period, but does not provide insight into whether people’s interest is growing, falling or steady.

**Activity Level** – The report can display information about all exchange members (or groups) or just the most active or least active members (or groups). If you select the All option, all exchange members (or groups) will be listed in the report, but only the first five will be selected for display in the graph. You can select as many additional users (or groups) as you like.

**Type** – Select whether you want to generate the report for user groups or for individuals.

**Time Period** – Select a time period for which you want to generate the report.

**Document Access** – Select Unique Access if you want to view the number of documents viewed by each user or group. (Each viewed document is counted once in this view, regardless of the number of times it has been viewed.) If you select All Access, the report displays the number of times people and group members viewed documents.

**Activity** – Select the type of activity you want to view the report on: number of views, number of times protected documents were printed, or both.

4. Click Apply. Information for the selected exchange members or groups is displayed in a graph and in a table. Hover the mouse pointer over users or groups in the graph to view access details.

    If you change the report options, be sure to click Apply again.

5. If you want to download and print the report, click Export. The report is downloaded as a table in a Microsoft Excel spreadsheet.

6. In Excel, from the File menu, select Print. A print dialog box appears.

7. Select your print options and click Print.

**Exchange Statistics Summary Report**

The Exchange Statistics Summary Report displays high-level statistical information in a table format about exchange members and documents. It provides insight into the size of your exchange, in terms of exchange members and content.

For each user role, the number of currently active and inactive exchange members is included, as is the total number of current exchange members (active and inactive) and the highest number of exchange members who had access to the exchange at a single time.

For documents, the report shows the current number of documents, as well as page counts and size of each document. The High column shows the largest number of documents and pages posted at any one time, along with their size.

**To view, export and print the Exchange Statistics Summary Report**

1. From within the exchange, display the Reports screen.
2. Click **Exchange Statistics Summary**. The **Exchange Statistics Summary** screen appears.

3. Options appear at the top of the screen to view the report for **User Roles** or **Documents**.

4. If you want to download and print the report, click **Export**. The report is downloaded as a table in a Microsoft Excel spreadsheet.

5. In Excel, from the **File** menu, select **Print**. A print dialog box appears.

6. Select your print options and click **Print**.

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**Folder Coverage report**

The Folder Coverage Report provides insight into which groups are most active and which folders they are accessing most often. It is presented in a graphical format that lets you quickly analyze group activity and the information that is most interesting to the groups’ members.

The Folder Coverage Report captures information about document activities, including viewing, printing and downloading. You can view information for the groups and folders that are most, and least, active. The report is presented in the form of a “heat map”; darker colors indicate a higher level of activity; lighter colors indicate little or no activity. If a group does not have access to any documents within a folder, the folder appears blank on the report. If the group has not read any of the documents within the folder, 0% appears. If the folder is empty (no documents have been placed in it yet), **No Access** is shown. In addition to percentages, the actual number of accesses can be displayed by choosing **Number** from the **Format** options menu.

The **Total coverage** row at the top of the report shows aggregated totals for all folders on the exchange, not only those displayed on the report.

While this report provides another gauge of buyer interest, it also can provide insight into whether a particular group is interested in some part of the asset being sold (European operations, for example). As another example, an unusual level of interest in litigation documentation may indicate an elevated concern about the risk that would be acquired along with the asset.

**To view, export and print the Folder Coverage report**

1. From within the exchange, display the **Reports** screen.

2. Click **Folder Coverage**. The **Folder Coverage Report** screen appears. A **Format** menu at the top of the screen lets you choose a format for the report, and filters let you choose report options.

3. Make your selections, then click **Update**. Information for the selected number of folders and groups is displayed.

   If you change the report options, be sure to click **Update** again.

4. When you are ready to print the report, click **Export**. The report appears in table format in a Microsoft Excel spreadsheet.

5. In Excel, from the **File** menu, select **Print**. A print dialog box appears.

6. Select your print options and click **Print**.
Reviewing current and staged permissions

Intralinks provides three reports used to review document permissions:

- Applied Permissions Report
- Gap Finder Report
- Selected Group Report

These reports can be used to review both currently applied permissions and staged changes. They can be selected from the Report/Export button on the Permissions screen. After the selected reports have been generated, they are available on the Reports tab. They appear in Microsoft Excel format and can be printed.

The **Applied Permissions Report** lists all the folders and documents on the exchange, along with the permissions assigned to them for each member group. If you find that corrections need to be made, return to the Permissions screen to make them.

The **Gap Finder Report** appears as a “heat map” and provides a statistical summary of pending and current permissions by group for all files. It lists the folders within the exchange on the left side of a grid and the groups within the exchange at the top of the grid. If a group has permission to access all files within a folder, the space on the grid for that folder and group is bright green. If the group has permission to access some, but not all, of the files, the space is light green. If the group does not have access to any files in a folder, the corresponding space is red. Using this report, you can quickly spot areas of concern that need to be fixed or investigated further.

The **Selected Groups Report** displays the same information that is available on the Permissions screen. The report displays information only for the groups that currently are selected on the Permissions screen; if you want to view information for other groups, you must return to the Permissions screen and select those groups. All the documents on the exchange are listed, along with the permissions assigned to them for each group. Permissions that have been staged but have not been applied are highlighted. The Selected Groups Report offers greater detail than the Gap Finder Report and can be used to investigate any gaps identified on that report.

To generate a permissions report

1. From within the exchange, display the Reports screen.
2. Click on the name of the Permissions report you want to generate. A list of previously generated reports is displayed.
3. Click Run New Report. A message will appear to inform you that the report is being generated and will appear on the Reports screen. Click the X or Cancel to close the message.
4. If Ready appears in the Status column, the report is ready to view. If Pending appears, wait a few minutes, then click the Refresh to update the list.
5. When the new report is ready to view, click Ready or the Download button to download the new report. The report appears as a Microsoft Excel spreadsheet. (Depending upon your browser, the report may appear...
automatically, or you may have to double-click the downloaded report to open it.)

6. If you want to print the report, select Print from the Excel File menu. A print dialog box appears.

7. Select your print options and click Print.

Search Summary Report

The Search Summary Report provides a view into the terms being used when people search the exchange for specific documents or folders. The information is displayed in table format.

This report is available only if the enable document content search setting is selected for your exchange.

Using the information in this report, you can get another view into the information that is most important to exchange members. You also can use it to determine if important information needs are being met by the exchange. For example, if a large number of people search for a term frequently, this might indicate that the information they need is missing from the exchange, or the documents they want to access are not located in the folders where they expect to find them.

To view, export and print the Search Summary report

1. From within the exchange, display the Reports screen.
2. Click Search Summary. The Search Summary screen appears.
3. Click the filter icon at the top of the screen to select the Activity Level (number of terms), Type (based on exchange members or groups) and Time Period that will be included in the report.
4. Click Apply. Information for the selected number of folders and groups is displayed.
   
   If you change the report options, be sure to click Apply again.
5. When you are ready to print the report, click Export. The report appears in table format in a Microsoft Excel spreadsheet.
6. In Excel, from the File menu, select Print. A print dialog box appears.
7. Select your print options and click Print.

User Activity by Group Report

The User Activity by Group report provides a comprehensive view of group and user coverage for folders and documents. The report can be created for specific groups or for all groups. Groups that do not include any members yet are not included on the report. You can choose to exclude documents for which there has been no activity.

The report is produced offline and provided to you when it is ready for viewing. Reports generally are available within one hour after a request is made. The report will be delivered as a Microsoft Excel spreadsheet. The activity for each group included on the report will be displayed on a separate worksheet.
The top section of the report provides summary information about the number of times people and groups accessed documents on the exchange. The lower part of the report lists individual documents by folder, along with the number of documents each user has accessed in each folder and the most recent date (if any) that the user accessed each document. If the user is not allowed to view the document, *No permission* appears on the report.

To request the User Activity by Group report

1. From within the exchange, display the Reports screen.
2. Click User Activity by Group. The User Activity by Group screen appears.
4. Select the time period for the activity that you want to include in the report: since the launch of the exchange; the last day; the last seven days; last month; or a range of dates that you specify.
5. (Optional.) Mark the Show only documents that have been viewed by the selected groups option. If you mark this option, the report may be shorter, take less time to create, and be easier to read.
6. Click Next. The Select Groups view of the User Activity by Group wizard appears.
7. Highlight each group that you wish to include on the report.
8. Click Submit.
9. The new report will appear at the top of the list of User Activity by Group reports. If Pending is displayed in the Status column, click Refresh until the status changes to Ready. Click Ready or its Download button to download the new report.
10. Click the downloaded file to open the report.
11. If you want to print the report, select Print from the File menu in Excel.
12. Select your print options and click Print.

Viewing Q&A Activity reports

The Category/Buyer Activity Report
This report provides a breakdown by status (submitted, waiting for expert reply, expert reply received, withdrawn, answered, follow-up, closed and deleted) of high-priority questions asked by each buyer group. A similar breakdown by category is provided for each buyer group. This report can be used to identify the groups or users who are most (and least) actively submitting questions, and the categories to which they most (and least) often assign to the questions.

By analyzing the Category/Buyer Activity Report, you can gain insight into the general types of questions being asked by individual buyer groups and identify trends across all groups that may be useful to your organization during the selling process.

To view, export and print the Buyer Category Activity Report

1. Display the Reports view.
2. Click **Q&A Activity Report**. The **Q&A Activity Report** panel slides out.

3. Mark the **Category/Buyer Activity**.

4. Select the number of categories and buyers that you want to include in the report.

5. Click **Export** to generate and download the report in Microsoft Excel spreadsheet format.

6. Click the downloaded file to view the report in Microsoft Excel.

7. In Excel, from the **File** menu, select **Print**. A print dialog box appears.

8. Click **OK**.

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**Submitter Activity Report**

The Submitter Activity Report provides a detailed breakdown of individual question submitters’ Q&A activity. This can be filtered to show activity for a specified time period and category.

You can generate a report for today, for yesterday, for the past seven days or the past 14 days. You can display information for a specific category or for all categories.

The report is sorted by buyer group, and the total number of questions submitted, followups submitted and questions or followups withdrawn are shown for each group. This information also appears for individual question submitters, along with the name of their organization, their Intralinks status (active, inactive or removed), and the date they most recently submitted a question.

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<td>3. Mark the <strong>Submitter Activity</strong> option.</td>
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<td>4. Select the time frame and categories you want.</td>
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<td>5. Click <strong>Export</strong> to generate and download the report in Microsoft Excel spreadsheet format.</td>
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<td>7. In Excel, from the <strong>File</strong> menu, select <strong>Print</strong>. A print dialog box appears.</td>
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Chapter 6: Reviewing current and staged permissions

Introduction

Intralinks provides three reports used to review document permissions:

- Applied Permissions Report
- Gap Finder Report
- Selected Group Report

These reports can be used to review both currently applied permissions and staged changes. They can be selected from the Report/Export button on the Permissions screen. After the selected reports have been generated, they are available on the Reports tab. They appear in Microsoft Excel format and can be printed.

The Applied Permissions Report lists all the folders and documents on the exchange, along with the permissions assigned to them for each member group. If you find that corrections need to be made, return to the Permissions screen to make them.

The Gap Finder Report appears as a “heat map” and provides a statistical summary of pending and current permissions by group for all files. It lists the folders within the exchange on the left side of a grid and the groups within the exchange at the top of the grid. If a group has permission to access all files within a folder, the space on the grid for that folder and group is bright green. If the group has permission to access some, but not all, of the files, the space is light green. If the group does not have access to any files in a folder, the corresponding space is red. Using this report, you can quickly spot areas of concern that need to be fixed or investigated further.

The Selected Groups Report displays the same information that is available on the Permissions screen. The report displays information only for the groups that currently are selected on the Permissions screen; if you want to view information for other groups, you must return to the Permissions screen and select those groups. All the documents on the exchange are listed, along with the permissions assigned to them for each group. Permissions that have been staged but have not been applied are highlighted. The Selected Groups Report offers greater detail than the Gap Finder Report and can be used to investigate any gaps identified on that report.

To generate a permissions report

1. From within the exchange, display the Reports screen.
2. Click on the name of the Permissions report you want to generate. A list of previously generated reports is displayed.
3. Click Run New Report. A message will appear to inform you that the report is being generated and will appear on the Reports screen. Click the X or Cancel to close the message.
4. If **Ready** appears in the **Status** column, the report is ready to view. If **Pending** appears, wait a few minutes, then click the **Refresh** to update the list.

5. When the new report is ready to view, click **Ready** or the **Download** button to download the new report. The report appears as a Microsoft Excel spreadsheet. (Depending upon your browser, the report may appear automatically, or you may have to double-click the downloaded report to open it.)

6. If you want to print the report, select **Print** from the Excel **File** menu. A print dialog box appears.

7. Select your print options and click **Print**.