Intralinks Guide to Managing Members and Groups in M&A Exchanges

Intralinks 24x7x365 support US: + (1) 212 543 7800 UK: +44 (0)20 7623 8500. See Intralinks login page for other national numbers

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Chapter 2: Adding People to Exchanges

Members’ roles within an exchange

Exchange roles determine each member’s rights and responsibilities within an exchange. Members who are active in several exchanges may have a different role within each exchange.

Exchange roles give great flexibility in enabling its members to work efficiently. Exchange roles keep members 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 Client 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 members 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 the buyers who are invited to bid on the assets your organization is selling. 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; members who are assigned this role are allowed to perform every task and to view all members on the exchange. Most exchanges include members with this role.

Hidden Manager Plus – This exchange role is nearly identical to that of Manager Plus, but these managers will be hidden from members with publishing and reviewing exchange roles. That is, these managers’ names will not appear in lists of members 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.
**Manager** – This exchange role is similar to that of Manager Plus, with one exception: members with this role may be given permission to delete and modify documents and comments. This role is seldom used.

**Manager Limited** – This exchange role can add documents and folders and can be given other document management rights. This exchange role is similar to that of Manager Plus, with a few important exceptions: members with this role cannot change exchange settings, the exchange phase, or the exchange’s splash screen.

**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 can 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. Members with this role also can update user groups and exchange settings for the footer and splash screen, and can change the exchange’s phase. Members with this role can see all other members (except those with the Hidden Manager Plus exchange role) and can be seen by all other members.

**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 members may be given permission to modify or delete documents and comments. Members with this role can see all other members (except those with the Hidden Manager Plus role) and can be seen by all other members. 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, people with this exchange role can add and remove reviewers from the exchange and create user groups.

**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 members 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.
Adding people to an exchange

If you have been assigned a manager exchange role of any type (Manager Plus, Hidden Manager Plus, Manager or Manager Limited) or the Reviewer Plus role, you can add people to your exchange.

You can use the Add New Users panel to add people quickly by typing or pasting their email addresses, selecting an exchange role for the new exchange members and assigning them to a group. If you want to select more than one role or group, you can continue to the Add Users – Advanced Details wizard to make whatever changes are needed.

To add people to an exchange

1. Open the exchange you want to add people to, then select Users and Groups at the top of the screen.
2. Click Add New Users. The Add New Users panel slides out.
3. Enter the email addresses of the people you want to add to the exchange. You can copy addresses or names from Microsoft Outlook or another email application and paste them in Intralinks if you like. To remove an address, click the x next to it.
4. Select an exchange role for the new exchange members.
   - If the new exchange members will not share the same role, select the role that applies to the largest number of new members. You will have an opportunity later to change the role for individual members.
5. Select a group for the new exchange members.
   - If the new users need to be assigned to more than one group, select the group that applies to the largest number of new exchange members. You will have an opportunity later to change the group selection for individual members.
6. If you are satisfied with your selections and no further changes are needed for individual members, click Add Users. The selected people will be added to the exchange. Depending upon the current phase selected for the exchange and the role selected for the new members, an email notification will be sent to the users welcoming them to the exchange.
   - If you wish to make any changes to the roles or groups selected for individual users, or if you want to add a comment to the email notification that will be sent to welcome the new users to the exchange, click Advanced. The Identify step of the Add User – Advanced Details wizard appears, displaying information for the new users.

Edit user information and add more people to the exchange

7. (Optional.) If you are adding people who do not already have Intralinks accounts, their names and phone numbers are blank. If you wish to add this information, click the icon next to each name, then make your changes. If you leave these fields blank, the users will be asked to provide this information when they log in for the first time.
8. (Optional.) You can add more people to the exchange if you like. If you know a person has access to Intralinks already, you can use the search field to
quickly locate the person. Otherwise, click the New User button and enter information about the person, or click Import Users to add people who are members of another exchange you manage.

9. When you have finished making changes, click Next. The Assign Roles view of the Add User – Advanced Details wizard appears.

Review the exchange role for each new person

1. Review the exchange role assigned to each person in the list, and make any needed changes.

   The exchange roles that are available vary, depending upon how your exchange was set up. There may be as few as two or three roles in the list, or as many as nine. For more about exchange roles, see “Members’ roles within an exchange” on page 3.

   If you want to apply the same role to multiple people, select their names and select the role you want from the Apply To Selected Users list.

2. Click Next. The Assign to Groups view of the Add User – Advanced Details wizard appears.

Review the group assignment for each person

The people you are adding appear in the Select User(s) list. The groups that have been created for this exchange are in the Select Group(s) list.

1. Select names in the Select User(s) list and drag them to the groups you want to assign them to, or click the Assign button next to the desired group(s).

   (Only Reviewers and Previewers can be added to buyer groups.) The New Users column is updated with the number of users added to each group. Clicking a group’s name or the number in its New Users column reveals a list of the group’s new and existing users.

   Group assignments are important because they determine which documents each person will be able to access, according to the level of security applied to each group. All reviewers must be included in a group to work in the exchange.

   If the group you want has not yet been created, click Add Group. The Add Group wizard appears, allowing you to create a new group. See “Adding a group to an exchange” on page 13 for instructions for using the Add Group wizard. Click Add to add the group. The Add User – Advanced Details wizard reappears, allowing you to continue adding people to groups.

2. Click Next. The Send Alerts view of the Add User – Advanced Details wizard appears.

Send welcome messages (optional)

You can send an email message welcoming people to the exchange. If a standard note has been provided for you, it will be displayed in the Note box; you can customize the note. People will not receive the welcome message until the exchange is available to them. (For example, if the exchange is in the hold phase, reviewers cannot access it; they will receive the welcome message when the exchange phase is changed to open.)
1. Review the list of people being added to the exchange. If you do not want a particular person to receive a welcome message, click the person’s name to remove it from the send list. By default, all new members will receive the message, and you receive a copy of it, as well.

2. (Optional.) You can make changes to the subject line of the alert or the note by editing the content in the Subject and Note fields.

3. Click Next. The Review view of the Add User wizard appears.

**Review and submit changes**

1. Review the list of people you are adding, along with their exchange roles, alert settings and group assignments. If you need to make changes, click Back.

2. When you are satisfied with your entries, click Add. The people are added to the exchange, and alert emails are sent to the people who can access the exchange at this time.
Chapter 3: Managing Users

Changing a person’s group assignment

You can move people from one group to another. You also can assign exchange members to a group if they were not assigned to one when they were added to the exchange.

**To change a person’s group assignment**

1. Display the **Users and Groups** screen and select the name of the person whose group assignments you want to change.
2. From the **Action** menu, select **Properties**.
3. The **Properties** view of the person’s information screen appears.
4. Click **Groups** to display the **Groups** view. A list of groups the person is currently assigned to (if any) appears.
5. If you want to remove the person from any group in this list, click the trashcan icon 🗑.
6. If you want to change the person’s group assignments, click **Assign to Groups**. The **Assign to groups** screen appears.
7. The groups the person already belongs to are highlighted. Click additional groups to add them, or click highlighted groups to remove them.
8. Click **Assign**. The new group assignments will be displayed in the person’s list of groups.
9. Click **Save Changes**.

Changing a member’s exchange role

From time to time, you may find that you need to change a particular member’s exchange role. You must have an equal or higher exchange role as the member you want to assign a new role. Use the steps below to make these changes.

To learn more about exchange roles, see “Members’ roles within an exchange” on page 3.

**To change an individual’s exchange role**

1. Display the **Users and Groups** screen and select the name of the person whose exchange role you want to change.
2. From the **Action** menu, select **Properties**.
3. The **Properties** view of the person’s information screen appears.
4. From the **Exchange Role** list, select the person’s new role.
5. Click **Save Changes**.

Making a member a key contact

Key contacts are managers on the exchange who can address issues other members may have with the exchange. Contact information for key contacts is
included on email alerts that are sent out to new members when they are invited to join the exchange, whenever new documents that affect them are added to the exchange, and other similar events.

**To make a member a key contact**

1. Display the Users and Groups screen and select the name of the person whose exchange role you want to change.
2. From the Action menu, select Properties.
3. The Properties view of the person’s information screen appears.
4. Mark the Key Contact option.
5. Click Save Changes.

**Setting roles for multiple members at the same time**

You can set exchange roles (Reviewer, Manager, etc.) for several exchange members at the same time.

**To set roles for multiple members**

1. Display the Users and Groups screen and select the names of people whose exchange roles you want to review or change.
2. From the Action menu, select Edit.
3. The Edit Users screen appears, providing a list of the selected users.
4. Use the menus in the Role column to set each member’s role within the exchange.
5. Use the Key Contact column to assign this role to members as needed. (The Reviewer Plus, Publisher Plus, Manager, Manager Limited, and Manager Plus roles are eligible for the Key Contact role.)
6. Click Save.

**Removing members from an exchange**

Note that when people leave their organizations, they should have been deregistered from Intralinks. When a person is deregistered, he or she is removed from all Intralinks exchanges and can no longer access Intralinks. In this case, it is not necessary for you to remove them from your exchange. For more about deregistering Intralinks exchange members, see “When people leave your organization” on page 11.

Occasionally you may need to remove a person from your exchange. The following steps explain how to do so.

**To remove a person from an exchange**

1. Display the Users and Groups screen and select the names of people you want to remove. Click names to highlight them.
2. From the Action menu, select Remove. A message appears asking you to confirm your decision.
Note that if you remove a person from the exchange, the action cannot be undone; you will have to add the person to the exchange as though he or she were a new member of the Intralinks community.

3. Click **Remove**.

**To view a list of people who have been removed from your exchange**

1. Display the **Users and Groups** screen.
2. Click **Removed Users** under **All Users** in the **Users and Groups** list on the left.
3. A list of people who have been removed from the exchange is displayed, along with their role, contact, and organization information. You can add more columns of information to the list by clicking **Manage Columns**.
4. 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.

**Finding exchange members**

If your exchange has many members, use the search and filtering tools to quickly locate the person you want to work with.

**To search for an exchange member**

1. Display the **Users and Groups** screen.
2. Enter the name (first, last or both) of the person you wish to find in the **Search** box.
3. Click the down arrow in the **Search** box and make sure **All Users** is selected, then press **Enter** or click the search icon ![search icon]. A list of people with the name you entered is displayed.

**Note:** If you enter more than one word, your search results will include all people whose names include one word or the other. Your entry can be uppercase or lowercase; the **Search** field is not case sensitive.

**Filtering the lists of users and groups**

Filters are powerful tools for locating people and groups. For example, you can see members with a particular exchange role (Manager Plus or Publisher). You can see all members associated with a particular organization, even if they have been assigned to multiple groups. You also can view lists of people by active or inactive status. Groups can be filtered by group type.

**To search using filters**

1. Display the **Users and Groups** screen.
2. If you want to filter the complete list of exchange members, display the **All Users** view. If you want to filter the groups, display the **All Groups** view.
3. Click the filter icon ![filter icon] next to the **Search** field. The filters box appears.
4. Select the desired filters from the filter menus, then click **Apply**. The list will be updated to display the filtered results.
To redisplay the list of all people or groups, click Clear.

**Resending welcome alerts to exchange members**

Occasionally you may be asked to resend the email message that welcomes a new member to your exchange. These welcome alerts can be resent to active exchange members.

**To resend the welcome alert**

1. Display the Users and Groups screen.
2. Find and select the name of the exchange member to whom the alert will be sent.
3. From the Action menu, select Resend Welcome Alert. The Resend Welcome Alert screen appears.
4. (Optional.) You can make changes to the subject line of the alert or the note by editing the content in the Subject and Note fields.
5. When you’re ready to send the alert, click Send.

**When people leave your organization**

When people leave your organization, they should be deregistered to prevent them from accessing information that should no longer be available to them. When a person is deregistered, he or she can no longer access any Intralinks service with the email address and password they used previously. He or she is automatically removed from all exchanges.

Requests for deregistration must be submitted to Intralinks Global Support in writing, and must include an authorization letter on company letterhead from either an IT official or a company official, indicating that the user is no longer with the organization. Individuals also can request that their own accounts be deregistered.

**To request account deregistration**

1. In Intralinks, click the Support & Feedback link in the upper right corner of the screen. Choose Help Center from the menu that appears. The Intralinks Support Center opens in a new browser tab.
2. Click the Email link at the top of the Support Center screen and enter “Deregister My Account” in the Subject line.
3. In the Question field, indicate a reason for the deregistration request.
4. In the Product field, select All Products.
5. Click Choose File and select the letter authorizing the deregistration.
6. Click Continue, and then click Finish Submitting Question. You will receive a ticket number. After the request is processed, Intralinks Global Support will email you confirmation that the request has been completed.
Chapter 4: Creating and Managing User Groups

Getting started with user groups

*User groups* provide an easy way for managers and publishers to assign document permissions for people who share some common characteristics. Most often, the members of a group all belong to a single organization. (For example, all the buyers from a single company would be included in the same user group.) In the case of exchange groups and collaboration groups, it is possible for people from different organizations to be included in the same group. Permission to view and work with documents is assigned by group, speeding the permissioning process and reducing the opportunity for errors.

In Intralinks, the following types of user groups may be available:

- **Exchange groups** – Exchange groups are the most flexible type of user group for exchange management purposes. These groups are used solely to speed permissioning for documents. People can be added and removed from these groups at any time, can have any exchange role, and can belong to more than one organization. People can be included in any number of exchange groups. These groups are purely a management tool; members do not gain any rights or responsibilities by being a member of the group.

  **Note**: Users in an exchange group do not see each other. They can only see themselves and those with a manager role, excluding hidden managers.

- **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.

  **Note** All members of collaboration groups, including those with the exchange role of Hidden Manager Plus, are visible to one another, regardless of their exchange roles. If a person 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, do not mix users from different organizations in a single buyer group.

People can belong to multiple exchange groups and collaboration groups.

Creating user groups

Follow the instructions in this section to create groups.
Adding a group to an exchange

Set properties for the group

1. Open the exchange you want to add a group to, then select Users and Groups at the top of the screen.
2. Click [Group]. The Add Group wizard appears.
3. Enter a name for the group.
4. Select the type of group you are creating.
   - Exchange Group – Select this group type if you only want to give the group’s members access to documents, and the members do not need to be visible to one another. People with any exchange role can belong to an exchange group.
   - Buyer Group – Use this group type for groups of reviewers and previewers who need to be visible to one another.
   - Collaboration Group – All members of collaboration groups can see one another, regardless of their exchange role.
5. (Optional.) Add notes that provide additional information about the group. These notes are for reference only; they do not appear on reports.
6. (Optional.) If document content searching (full-text searching) is enabled for the exchange, you can allow this group to search document content, notes entered for documents and folders, and the titles of documents and folders. To allow searching, mark the Allow this group to search document content option.
   - If this option is left unmarked, or if it does not appear, group members will be able to search only the titles of documents and folders.
7. Click Next. The Choose Members step of the wizard appears.

Assign people to the group

1. In the Available Users list, click the boxes next to names of people you want to add, then click Add Selected User(s) to move the names to the Group Members list.
   - You also can highlight one or more names and drag them from one list to the other.
2. Click Add. The new group is created and added to the All Groups list.

Copying groups from one exchange to another

You can copy groups from one exchange to another exchange.

To copy a group to another exchange

1. Open the exchange you want to copy a group from, then select Users and Groups at the top of the screen.
2. Select the group(s) you want to copy.
3. From the Action menu, select Copy. The Copy Group to an Exchange wizard appears.
4. Select the exchange you want to copy the group to.

   **Note:** If the destination exchange already has a group with the same name as the group you want to copy, you have the option to merge the two groups; the users within the group will be copied to the existing group.

5. Click **Paste**.

6. An informational message appears, alerting you that the groups are being copied; you will receive an email message when the groups have been copied.

### Modifying user group properties

After you have created a group, you can change the group’s name and add or edit a note about the group. If your exchange allows document content searching (full-text searching), you can add or remove this capability for the group.

**To modify a group’s properties**

1. Display the **Users and Groups** screen and select the group you want to modify.
2. From the **Action** menu, select **Properties**. The **Properties** view of the group’s information screen appears.
3. Make whatever changes are required.
4. Click **Save**.

### Viewing the members of a group

**To view the members of a group**

1. Display the **Users and Groups** screen and select the group you want to view.
2. From the **Action** menu, select **Properties**.
3. Select **Members** to display the **Members** view of the group’s information screen.
4. If you want to add members to the group, click **Add Members**. A list of all the people in the exchange appears; select the members you want to add, then click **Add**.
5. If you want to remove a member from the group, click the trashcan icon at the far right of the person’s name.
6. Click **Save Changes**.

### Viewing the history for a group

You can display a list of all the actions that have been performed by and for a selected group. The list includes information about the group’s creation, members who have been added and removed, and actions taken by members, such as accessing and exiting the exchange and viewing and printing documents.

**To view a group’s history**

1. Display the **Users and Groups** screen and select the group you want to view.
2. From the **Action** menu, select **Properties**.

3. Select **History** to display the **History** view for the group.

4. To view a limited range of history, click in the calendar field. A calendar appears; select the earliest date for which you want to see information.

5. If you want to view a single kind of activity, make a selection from the activities menu.

6. Click **Filter**.

7. To create a Microsoft Excel spreadsheet containing the currently displayed information, click **Export**, then click **Export this View**. You can print the spreadsheet using Excel.

8. Click **Cancel** when you are finished.

**Removing user groups**

When you remove a user group from an exchange, you must decide whether the members of the group will also be removed from the exchange. Note that people will be removed from the exchange only if they do not belong to any other groups on the exchange. If you want to remove these people from the exchange, see “Removing members from an exchange” on page 9.

For example, you may wish to remove a group and its members from an exchange if the group has signaled that it is no longer interested in acquiring the asset that this exchange was created to assist in selling. If you remove people from the exchange, there is no effect on other exchanges to which they belong.

Alternatively, you can choose to remove the group, but not remove the group’s members from the exchange. You may choose to do this if the group has become obsolete, but its members still have an interest in using the exchange. If they are reviewers, assign them to other user groups to ensure that they can continue to work in the exchange. For more information, see “Changing a person’s group assignment” on page 8.

**To remove a group**

1. Display the **Users and Groups** screen and locate the group you want to remove.

2. Click the trashcan icon in the row containing the group name.

3. A message appears asking if you want to remove the group and keep members on the exchange, or remove the members as well as the group from the exchange. Make your selection, then click **Remove**.