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Chapter 1: Welcome

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

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

This user guide provides step-by-step instructions for completing tasks using your Intralinks exchanges. Other tools also are available to help you make the most of your time while working in Intralinks exchanges:

The Answer Library is your online resource for troubleshooting issues that arise as you work in Intralinks exchanges. It also provides training videos to get you started with tasks that are new to you. To open the Answer Library, click the Help button in the upper right area of the Intralinks Platform window.

Of course, Intralinks also provides award-winning support. If the User Guide and 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
System requirements

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

Windows® operating system

- Operating system: (No specific requirement, but must be able to support a supported Web browser)¹
- Screen resolution: 1024 by 768 dpi or greater
- Web browser²: Microsoft® Internet Explorer 7 or a newer version; Firefox® 42 and later; Google Chrome 46 and later³
- (If using Bulk Download or Bulk Print functions) Microsoft .NET Framework 2.0⁴
- Adobe® Flash® Player 9, 10.3 or 11⁵
- Adobe Reader® 10 or greater

¹Your computer also 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).
²Browsers must support the TLS encryption protocol. The SSLv3 protocol is not supported.
³On Windows, Chrome requires Microsoft .NET Framework 2.0 or later.
⁴Microsoft® .NET Framework 2.0 is a minimum requirement; .NET Framework 3.5 is recommended. If you are using a Firefox® browser, you also must install a third-party plugin, such as FFClickOnce, to enable .NET Framework and Firefox to work together. FFClickOnce and similar tools are available from the Mozilla® website: www.mozilla.org
⁵If Adobe Flash Player is not installed, an alternative version of Intralinks Platform containing limited functionality is used. If you intend to use Intralinks’ Q&A function, Flash Player must be installed. Flash Player is required to view Intralinks Platform in languages other than English.
Macintosh®

- Operating system: (No specific requirement, but must be able to support a supported Web browser)
- Screen resolution: 1024 by 768 dpi or greater
- Web browser: Safari 9 and later; Firefox 42 and later; Google Chrome 46 and later¹
- Adobe® Flash® Player 9, 10.3 or 11²
- Adobe® Reader® 10 or greater

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¹ On Macintosh, Chrome does not allow bulk downloading or bulk printing; use Safari to perform these functions.
² If Adobe Flash Player is not installed, an alternative version of Intralinks Platform containing limited functionality is used. If you intend to use Intralinks’ Q&A function, Flash Player must be installed. Flash Player is required to view Intralinks Platform in languages other than English.
Chapter 2: Getting started with Intralinks

Overview

Read this chapter for overviews of:

- The features in Intralinks exchanges
- Intralinks’ security features
- Users’ exchange roles and responsibilities
- Logging into and out of Intralinks
- Managing your password
- Updating your profile and preferences
- Logging out of Intralinks Platform
- Removing yourself from an exchange
- Recommend that other people be given access to your exchanges
- Finding help if problems arise

What are exchanges?

Each Intralinks exchange provides a secure Web-based space for sharing critical information, performing workflow tasks, and collaborating with people both inside and outside your organization.

Exchanges are your online dealrooms — the place where you and other buyers can review information about the assets being sold. Exchanges are the areas where you ask questions and collaborate with others who are working on the deal or project with you. Generally, an exchange is devoted to a single project, or deal. As a result, you may find yourself participating in a number of exchanges at the same time if you are involved in several simultaneous deals.

Depending upon the purpose of the exchange that you are using, you may use the exchange for sharing or consuming documents and other content; you may use it for collaboration or completing tasks that are part of a larger workflow, or a combination of these activities.

A quick tour of your Intralinks exchange

Whenever you use an Intralinks exchange, you must begin by logging in. This gives you access to the exchanges and documents to which you have been assigned and prevents you from viewing material you are not meant to see. To learn more about logging in, see the next section, “Logging into Intralinks.”

After you log into Intralinks, you will see a list of the exchanges in which you participate.

Once you have chosen the exchange you want, a list of folders and documents appears. All the documents you have permission to read are displayed. Generally you can view, print or download the documents that appear in your exchange, but you may find that security settings limit your ability to perform these tasks.
These tasks are common to all Intralinks users. Some users have additional rights and responsibilities for maintaining and managing the exchange. See “Your role within your exchange” on page 8 for more information.

Security within Intralinks

Organizations use Intralinks exchanges to share highly sensitive or confidential information with one another. Intralinks recognizes that the need for security is paramount, and a variety of measures have been put into place to ensure that only the people intended to view each document actually see it.

For example, users see only the documents they are given permission to see, and exchange hosts can prevent users from printing, downloading or making images of the documents. Watermarking and other features can be used to discourage users from sharing the documents that they are allowed to print. These safeguards ensure that both sellers and buyers are protected from the improper sharing of information.

Your role within your exchange

Every person invited into an Intralinks exchange has been assigned an exchange role, or set of rights and responsibilities while working within the exchange. If you have been invited to a number of exchanges, you may discover that you have a slightly different role in each exchange.

There are three basic exchange roles within Intralinks:

**Reviewer** – Reviewers, as buyers are known in Intralinks, are responsible for reading the documents that appear in the exchange. Depending upon how their exchange is set up, they may be able to propose or submit questions about the documents. 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. This is the exchange role assigned to you for the current exchange.

**Publisher** – 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, as well as exchange managers. Publishers generally are from the organization that is hosting the exchange.

**Manager** – 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. Depending upon their responsibilities within the exchange, they may be responsible for managing and answering reviewers’ questions.

Logging into Intralinks

Each time you visit Intralinks, you will be asked to log in by entering your email address and password. This is to ensure that you see only the documents that are relevant to you. You have a single password for Intralinks, no matter how many exchanges you participate in.
If your organization uses Single Sign-On (SSO) or Exclusive Single Sign-On (e-SSO) functionality, you will be asked to log into your corporate network, rather than Intralinks, when you display the Intralinks login page. If you are already logged into the corporate network, Intralinks will be displayed automatically. While you are logged into the corporate network, you will not have to enter your Intralinks credentials to view exchanges or protected documents that you have downloaded, unless you access an exchange that uses enhanced security, and the security rules require you to enter your credentials. (If your organization uses e-SSO, you will not be given Intralinks login credentials; you must log into the corporate network to access your exchanges and documents.)

For security purposes, it is important that you do not share your password with others. You should not share your login details even with those who are working on a deal or project with you. If a colleague needs to have access to an exchange, you can recommend that he or she be added as a member of the exchange. To learn more, see “Recommending other users” on page 19.

Logging in the first time

When you are invited to join an exchange, you will receive two email messages from Intralinks. (The message may indicate that it has come from the company that is hosting the exchange.) The first message includes a link to the exchange. The second message contains your temporary password to Intralinks; if you have participated in Intralinks exchanges in the past, you will be asked to use the password you use for other exchanges.

If your organization uses Single Sign-On (SSO) or Exclusive Single Sign-On (e-SSO) functionality, you will not receive an email message with a temporary password.

About your email address

Your email address serves as your Intralinks user ID. If you have more than one email address, use the address for the account where you received the invitation message to the exchange. If your email address changes, contact Intralinks Customer Service for assistance in updating your Intralinks ID. Local telephone numbers for Intralinks Client Services can be found at:

http://www.intralinks.com/contact/client-services/

To log in the first time

1. Locate the email messages containing your invitation to the exchange and your password.
2. Click the link to the exchange that appears in the invitation message. A web browser opens and Intralinks’ license agreement is displayed.
3. Read the license agreement and click Accept to continue logging in. Your profile screen appears. Continue with step 4.
   If you do not agree to the terms of the license agreement, click Do Not Accept. The login screen reappears, and you can close your browser to exit.
4. Review the fields on the screen and make entries in the fields marked in red to create a user profile for yourself, to change your password and enter a challenge question, and to set preferences.

   The challenge question is particularly important. Be sure that you choose a question whose answer you are sure to remember, as you may be asked this question when you log in if your exchange uses Intralinks’ enhanced security, if you forget your password or if you contact Intralinks Client Services with other requests.

   Mark the **Share additional info with users I work with** option if you want to make your entries in the *Title*, *Industry* and *Functional Area* fields available when colleagues view information about you in the People list on the Hub. If you do not want to share this information with others, unmark the **Share additional info with users I work with** option.

5. When you have finished making profile entries, click **Save**. Your exchange appears.

Returning to Intralinks

**To log in after your first visit to Intralinks**

1. Using your Web browser, go to [www.intralinks.com](http://www.intralinks.com) and click the **Login** button that appears there. The Intralinks login page appears. (You can use your browser to create a bookmark for this page, making it easy for you to return to Intralinks in the future.)

   **If your organization uses Single Sign-On (SSO)** If your organization uses Intralinks’ Single Sign-On (SSO) functionality and you are logged into the corporate network, Intralinks will be displayed automatically. (If you are not logged into the corporate network, you will be asked to log into it.) Skip to step 5.

2. In the **Email Address** field, enter the email address for the account where you received your invitation to the exchange.

3. In the **Password** field, enter the password you created after you logged into Intralinks the first time.

   If you have forgotten your password, click the **Forgot your Password?** link and follow the instructions that appear on your screen. (For step-by-step instructions, refer to “Resetting a lost password” on page 12.)

4. Click **Log In**.

   If a message appears asking you to answer your challenge question or a security code, type the answer and click **Submit**.

   The Intralinks **Hub** appears, displaying a list of the exchanges in which you are a participant. (If you have been invited to only one exchange, that exchange is displayed immediately.)

   The **Hub** also includes a dashboard. The dashboard gives you quick access to new documents, unread documents, new and updated documents, open tasks assigned to you, tasks that you can initiate, and links to maintenance tasks and help tools. If you have access to more than 50 exchanges, information only for the five exchanges you use most are displayed.

5. Select either an item in the dashboard or an exchange. To select an exchange, double-click the exchange name.
If the managers of the exchange have opted to use Intralinks’ enhanced security function, you may be asked to enter the answer to your challenge question (which you selected the first time you logged into Intralinks). You also may be asked to enter a one-time password or security code; if this is the case, follow the steps on the screen to complete the login process.

Depending upon how your exchange is set up, you can receive security codes by email or as a text message (SMS) on a mobile device. Some exchanges may require you to use one method or the other; other exchanges may allow you to choose the option you prefer. To learn more, see “Registering a mobile phone to receive security codes” on page 13.

A variety of enhanced security settings are available to exchange managers, and your login experience may vary from one exchange to another, and from one time to the next. Intralinks’ enhanced security is risk based, so you might be asked to answer your challenge question if you log into Intralinks from a different location than you usually do, for example.

6. If you selected an exchange, a list of documents available to you in the exchange is displayed. If you selected a dashboard item, that item is displayed.

Changing your password

Your Intralinks password expires periodically to ensure the security of the exchanges that you access. For most users, passwords expire every 90 days, but exchange managers may set another frequency for their exchanges.

If your password has expired, a message appears when you attempt to log into Intralinks, instructing you to create a new password.

You can change your password more frequently if you like. Follow the instructions below to do so.

If your organization uses Single Sign-On (SSO) 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 your password

1. Log into Intralinks using your old password. The Intralinks Hub appears.
2. Locate the My Profile link at the top of the window and click it. Your profile screen appears.
3. In the Current Password field, enter the password you have been using.
4. In the New Password and Re-type New Password fields, enter the new password.
   A tip will appear onscreen to outline the rules for creating your password. (Depending upon the selections that exchange managers made when setting them up, the rules may vary.)
5. Click OK.
Resetting a lost password

If you have forgotten your password, you can reset it. If you have registered a mobile device with Intralinks, you can receive a security code by text message (SMS); this code will allow you to reset your password. If you have not registered a mobile device, the code can be sent to the email address that you use to log into Intralinks. To learn more, see “Registering a mobile phone to receive security codes” on page 13.

If your organization uses Single Sign-On (SSO) If your organization uses Intralinks’ Single Sign-On (SSO) functionality and you have forgotten your password, contact your organization’s IT department for assistance. Do not use the procedure below.

▶ To reset your password

1. On the login page, click Forgot your password? The Forgot Password screen appears.

2. Enter the email address that you use to log into Intralinks, then click Next. The Answer security question screen appears.

3. Answer the question that appears on the screen. This is the challenge question you chose when you created your Intralinks user profile. Click Submit. (Note: You may not be asked to answer your challenge question under some circumstances. If this is the case, go on to step 4.)

4. The Choose Delivery Method screen appears. If you have registered one or more mobile devices with Intralinks, you can choose to have a security code sent by text (SMS) to one of these devices. You also can opt to receive an email message with a link that will allow you to reset your password. Choose the method you prefer.

5. Click Next. A text or email message will be sent to you.

6. If you chose email as your delivery option: Check your email for a message from Intralinks. The message contains a link that will allow you to reset your password. Click the link to display a screen where you can enter your new password. You also may be asked to answer your challenge question on this screen.

   If you chose SMS as your delivery option: Check your mobile device for a message from Intralinks. The message contains a security code that will allow you to reset your password. The Enter code screen is displayed in Intralinks; enter the code here and click Next. The Create new password screen appears; enter and confirm your new password, then click Finish.

After you reset your password, the Intralinks Hub appears.

Personalizing your Intralinks experience

You can update your contact details (except for your email address) and preferences for using Intralinks at any time.

▶ To update your profile and preferences

1. Log into Intralinks Platform. The Intralinks Platform Hub appears.
2. Locate the **My Profile** link at the top of the screen and click it. The **Details** view of your profile screen appears.

3. Review the information on the screen and make any needed changes.
   
   Mark the **Share additional info with users I work with** option if you want to make your entries in the **Title**, **Industry** and **Functional Area** fields available when they view information about you in the **People** list on the **Hub**. If you do not want to share this information with others, unmark the **Share additional info with users I work with** option.

4. Click the **Alerts** tab to display the **Alerts** view of your profile screen. Review the selection and make any changes that you like.
   
   You can indicate whether email alert messages will be in HTML or plain-text format; whether these alert messages will be sent to additional addresses; and the frequency with which these alert message will be sent to you.
   
   (Note that an exchange manager may wish to send you a message immediately; in some circumstances, you may receive an alert immediately, regardless of the preference you select here.)

5. Click **OK**.

**Registering a mobile phone to receive security codes**

If you register a mobile phone or another device that is capable of receiving text (SMS) messages, you can have security codes texted to you. These codes can be used to reset your password or to gain access to exchanges with enhanced security requiring a one-time password before entry. Some exchanges may require you to use one method or the other; other exchanges may allow you to choose the option you prefer. When resetting your password, you always have the option to use either SMS or email as the delivery method.

In most cases, receiving security codes by text is a faster, easier alternative to having a temporary password sent by email, but you can continue to have security codes sent to you by email if you like.

Intralinks will not use registered phone numbers for any purpose other than to send verification codes and will not share registered numbers with other parties.

If your password expires and you have not yet registered a mobile device, you will have the opportunity to do so when you reset your password. You also can register a device if you attempt to access an exchange that requires a security code, if the exchange manager allows the code to be sent by SMS. If you wish to register a device now, you can complete the steps below.

► **To register a mobile phone**

1. Log into Intralinks Platform. The Intralinks Platform **Hub** appears.

2. Locate the **My Profile** link at the top of the screen and click it. The **Details** view of your profile screen appears.

3. In the **Security Settings** section of the screen, click the **Register and Review Mobile Numbers** link. The **Security Settings** screen appears in a new browser instance.

4. Review the country code and enter the phone number for your mobile device.
5. Click **Send Code**. A text message containing a security code will be sent to your mobile device.

6. Enter the security code on the **Verify Mobile Numbers** screen, then click **Verify**. The **Security Settings** screen will be redisplayed, showing the number as verified.

7. If you wish to register another mobile device, click **Add Mobile Number** and repeat steps step 4 through step 6. You can register up to three numbers. If you register multiple numbers, you will be able to choose which number will receive the text when a security code is requested.

   If you do not wish to register any more numbers, close the **Security Settings** screen.

### Connecting with other Intralinks users

You can create one or more “enhanced” sub-profiles for yourself that will allow you to connect with counterparts in Intralinks’ community of users to facilitate deals and other business activities.

As an M&A professional, you can create one of the following profile types:

- M&A Seller
- M&A Buyer
- M&A Advisor/Expert

If you choose to create one or more sub-profiles, you will be able to connect with qualified buyers, sellers and advisor experts using highly relevant information:

- Specific industry interests based on Global Industry Classification Standard (GICS®) codes; these are industries in which you have an interest or expertise, not the area in which you work
- Prospective deal size range
- Specific geographies of interest (countries and regions)
- Deal types and structures

You can attach up to five documents detailing your expertise to each profile.

Intralinks Community profiles are optional, and if you create profiles for yourself, you will have full control over who is allowed to view each profile. You can make each profile:

- Hidden from all users except yourself.
- Visible to all members of the M&A community.
- Visible to all members of the M&A community, but without any identifying information. These are referred to as **anonymous profiles**. For more information, see “About anonymous profiles” on page 18.

These selections apply only to your community profiles, not to your main profile.

When you search the Intralinks Community, your search will be limited to users who have opted into the community and have made their profiles visible to users.
like you. In order to search other users’ profiles, you must have one or more enhanced sub-profiles yourself.

An activity index number will be calculated for each user, based on the number of exchanges they can access, their exchange roles, the frequency with which they use Intralinks, and a variety of other factors. The activity index can help you to identify the Intralinks users who are the best prospective business partners for you. Once you’ve identified prospective business partners, you can download vCards containing their contact information and send them email messages via Intralinks Platform.

**To add an enhanced sub-profile**

1. Locate the **My Profile** link at the top of the screen and click it. The **Details** view of your profile screen appears.
2. Click the **Profile** tab.
3. Click the **Add a New Profile** button at the bottom of the screen. The Identify Sub-Profile screen appears.
4. Using the Select a sub-profile for list, select one of the following options:
   - M&A Seller
   - M&A Buyer
   - M&A Advisor/Expert
5. Click **Next**. The **Select Industry** step of the wizard appears, displaying a list of industries based on Global Industry Classification Standard (GICS®) codes.
6. Select the industry or industries that you focus on in the selected role. Highlight each industry that you want to select and click the arrow button to move your selection to the **Industry** list on the right. Click the arrow icon to the left of each industry area to see areas of greater specialization; you can select industries at any level of specialization. (For example, you can select **Energy** to include all areas of specialization within the energy industry, or you can drill down and select an area of specialization like **Oil & Gas Drilling**.)
   **Important!** These are industries in which you have an interest or expertise, not the area in which you are employed.
7. When you have finished selecting industry interests, click **Next**. The **Select Geography** step of the wizard appears.
8. Select the continents, regions or countries that you focus on in the selected role. Highlight each geographical area that you want to select and click the arrow button to move your selection to the **Selected Locations** list on the right. Click the arrow icon to the left of each geographical area to see geographical subdivisions.
9. When you have finished selecting geographical areas of interest, click **Next**. The **Set Profile Details** step of the wizard appears.
10. Select the types and size of deals that you specialize in.
11. If you want to attach documents containing promotional materials or other relevant information, click **Choose**. The **Select file to upload** dialog box appears; highlight the file that you want, and click **Open**.
If you want to add another attachment, click Choose again and select the document. You can attach up to three documents detailing your expertise to each profile.

12. Click Next. The Set Visibility step of the wizard appears.

13. Indicate whether other people are allowed to view this profile.

If you mark the IntraLinks Community members option, the Anonymous option is marked automatically. Leave this option marked if you want others to be able to see your profile and to contact you, but without seeing information that would identify you or your organization. (You can choose to reveal this information to individual community members later if you like.)

If you want your identifying information to be visible to other users, be sure that the Anonymous option is unmarked.

For more information about using anonymous profiles, see “About anonymous profiles” on page 18.

If you do not want others to view your profile at all at this time, select the Only me option.

If you decide later that you wish to change your visibility settings, you can edit your profile at any time. The following procedure includes instructions for editing your profile.

14. Click Save to create your sub-profile. A confirmation message will appear; click Close.

To create another profile, repeat this procedure.

► To edit an enhanced sub-profile

1. Locate the My Profile link at the top of the screen and click it. The Details view of your profile screen appears.

2. Click the Profile tab.

3. Locate the profile that you want to change and click the Edit button next to it.

4. The profile appears. Make the changes that you wish to make, then click Save to save your changes.

5. Click OK to close the My Profile screen.

► To find other users who have created sub-profiles

1. Display the Intralinks Hub.

2. Click the People tab on the left side of the screen. A number of additional tabs appear. Click on the Community tab.

3. Click the New Search button. The Community Search screen appears.

4. Select the attributes of the people you want to find, and click Search. The people who match your search criteria will be displayed, along with their contact information.

User is Anonymous is displayed for users who have chosen not to make their name, organization and other identifying available to the community. If you contact an anonymous user, an invitation is sent to that person, who has the option to accept your invitation, at which point, his or her identity will be revealed, or continue the conversation anonymously.
To send an email message to another member of your Intralinks Community

The results of a community search should be displayed on your screen.

1. Highlight the user’s name in the search results list.

2. From the Actions menu, select Contact User. The Compose Note screen appears.
   If the user is anonymous, select Send Invitation. The Compose Invitation screen appears.

3. Enter a subject line and your message.

4. (Optional.) If you want to receive a copy of the message, mark the CC me on the message option.

5. Click Send.

The message will be sent in standard Intralinks format. The text “Intralinks on behalf of <your name>” will appear in the From: line of your message.

Note: When you send a message or an invitation to another community member, your name, email address and a link to your profile are provided, even if your profile is anonymous. Once you contact a user, your profile no longer is anonymous.

To respond to an invitation from another community member

If your community profile is anonymous, use the following procedure to reply to invitations received from other community members.

1. Display the Intralinks Hub.

2. Click the People tab on the left side of the screen. A number of additional tabs appear. Click on the Community tab.

3. In the Saved Searches box, locate the Community Invitations link and click it. A list of invitations that you have sent and received appears.

4. Highlight the invitation that you want to respond to, then select Open Invitation from the Actions menu. The Invitation screen appears, displaying the details of the invitation.

5. If you wish to accept the invitation, click Accept. The Accept Invitation screen appears. If you do not wish to accept the invitation at this time, click Do Not Accept. The Do Not Accept Invitation screen appears.
   Important! If you accept an invitation, your name, email address and organization all will become visible to the person who sent you the invitation. If you are not ready to reveal this information, click Do Not Accept. You can send a reply to the sender of the invitation, and the person will be able to respond. You can accept the invitation later, if you like.

6. Enter a subject line and your message.

7. (Optional.) If you want to receive a copy of the message, mark the CC me on the message option.

8. Click Send.
The message will be sent in standard Intralinks format. If your identifying information is visible to other community members, the text "Intralinks on behalf of <your name>" will appear in the From: line of your message. If your profile is anonymous, "User is anonymous" will appear instead.

To download a vCard for another member of your Intralinks Community

You can download vCards (electronic business cards) for the members of your Intralinks Community. Consult the documentation for your email application for importing the downloaded vCards into the application’s contacts list.

The results of a community search should be displayed on your screen.

1. Highlight the user's name in the search results list.
2. From the Actions menu, select Download vCard. The File Download dialog box appears.
3. Click Save. The Save As dialog box appears.
4. Select a location for the vCard and click Save.

About anonymous profiles

If you have chosen to make your profile anonymous (you selected the Anonymous option on the Set Visibility step of the profile wizard), your profile will appear in the search results when other members of the M&A community search for business partners who match your description, but they will not see your name, organization or contact information. (Note that this affects only your M&A community sub-profiles. Your current Intralinks contacts will continue to have access to your main profile, which includes identifying information.)

If your profile is anonymous, M&A community members who find your profile will be able to send an introductory note to you through Intralinks. This is a standard email alert, to which the community members can add their own notes. The alert will contain a link to a conversation screen in Intralinks; the text from the alert is displayed here, as well; you can use the conversation screen to accept or decline the invitation. In either case you can send a note back to the individual who sent you the invitation. If you accepted the invitation, your name and email address will be displayed, and your sub-profile will no longer be anonymous to this user. (It will remain anonymous to other users.) If you did not accept the invitation, you will continue to be anonymous, but you can continue the conversation with the sender of the invitation. When, and if, you decide that you want to pursue the deal, you can accept the invitation and reveal your name and contact details to the sender.

Logging out

Whenever you have finished working with your exchanges, we suggest that you log out of Intralinks to ensure that others will not be able to view information that is not meant for them. If your Intralinks session is idle for a set period of time, you will be logged out automatically. (A message will appear five minutes before this occurs, giving you the opportunity to continue working in your exchanges if you like.)

The amount of time before you log out typically is 60 minutes, but exchange managers may request a shorter idle time limit. The minimum session time allowed
is 20 minutes. If you have access to multiple exchanges, the shortest timeout periods used by any of those exchanges will be the one used.

► To log out of Intralinks Platform

◊ Click the Logout option in the upper right corner of the Intralinks Platform screen. The Intralinks login screen appears.

If your organization uses Single Sign-On (SSO), the login screen may not appear. In this case, a screen appears to inform you that you have logged out and can close the browser or click the Login button to return to Intralinks Platform.

Removing yourself from an exchange

Use the following procedure to remove yourself from an exchange that you no longer need to use.

If no Remove Me command appears in the Actions menu in step 3, the owner of your exchange does not allow you to remove yourself from the exchange. Contact an exchange manager for assistance.

► To remove yourself from an exchange

1. Display the list of your exchanges in the Hub.
2. Highlight the exchange that you no longer need to use.
3. From the Actions menu, select Remove Me. A dialog box appears.
4. Select your reason for removing yourself, then click Remove Me.

Recommending other users

Intralinks users can recommend that colleagues be added to the exchanges that they use. These recommendations are forwarded by email to the exchanges’ key contacts, who choose whether to add the individuals as exchange users.

► To recommend that users be added to a single exchange

You can use the procedure below to recommend that users be added to the exchange that you currently are using.

The Users & Groups tab should be displayed.

1. Click the Recommend User to this Exchange button near the top of the screen. The first step of a two-step wizard appears.
2. Using the Select User(s) tab on the left side of the screen, enter the email address, name or organization associated with the person you are recommending. As you type, the list of contacts is narrowed to show only those that match your entry. When you see the name that you want, highlight it and click the arrow button to move it to the Selected Users list.

If you enter an email address that does not exist in Intralinks’ Global User Directory, the Recommend New User tab is displayed, and you can enter the information needed to add the individual to the Global User Directory. When you have entered the required information, click Add to add the person to the Selected Users list.
3. If you wish to add multiple people, repeat step 2. When you have finished adding users, click Next. The Review and Complete step of the wizard is displayed.

4. Enter a note explaining your request to the exchange manager.

5. Review the selected users to be sure they are correct. If any changes need to be made, click the Back button to do so.

6. When you are satisfied with your selections, click the Save button. A request will be emailed to the key contacts for the exchange.

**To recommend that users be added to multiple exchanges**

If the Hub is not already displayed, roll your mouse over the exchange name in upper left corner of the screen and select Hub from the list that appears.

1. Click the People button on the left side of the screen to display a list of all the people you have worked with in Intralinks.

   These include people with public profiles, people you have added to your exchanges (if you are a manager on any exchanges), and people with whom you work on at least one exchange already, regardless of whether their profiles are public or private.

2. Use the search and filtering tools to the right of the Hub button to find the person or people you want to recommend.

3. Highlight the names of the person or people you want to recommend. To select multiple people, press the SHIFT or CTRL key while clicking the users’ names.

4. From the Actions menu, select Recommend User to an Exchange. The first step of a two-step wizard appears, displaying a list of your exchanges.

5. Mark the boxes next to the exchanges you want the selected users to be added to, and click Next. The second step of the wizard appears.

6. Enter a note explaining your request to the exchange manager.

7. Review the selected users and exchanges to be sure they are correct. If any changes need to be made, click the Back button to do so.

8. When you are satisfied with your selections, click the Save button. A request will be emailed to the key contacts for the exchanges you selected.

**Troubleshooting**

Although Intralinks exchanges are designed to be easy to use and highly reliable, tools are available to help you if you encounter problems as you complete your tasks. In addition to Intralinks’ award-winning customer support, we provide an extensive knowledgebase, the Intralinks Answer Library, to help answer your questions and get you back to work as quickly as possible. The Answer Library also provides training videos to get you started with tasks that are new to you.

You can browse through the Answer Library — the most popular topics appear first in the list — or you can search for a specific word or phrase.
To view the Answer Library

◊ Click the Help option in the upper right corner of the Intralinks window. The Intralinks Answer Library appears in a new browser window.

If the Answer Library does not provide the information you want, contact Intralinks Client Services. Contact options can be found in the box on the right side of the Answer Library screen.
Chapter 3: Reviewing documents

Overview

In this chapter you will learn how to:

• Open your exchange
• Locate documents
• Create a list of favorite documents
• Open documents
• Download documents
• Print documents
• Work with IRM-protected documents
• Use Intralinks Viewer to view PDF and Microsoft Office documents

Your role as reviewer

In Intralinks exchanges, buyers are known as reviewers. As a reviewer, you can perform all the due diligence work you would perform in a physical dealroom, but you can do it from the convenience of your desk at times that suit your schedule. Unlike a physical dealroom, you have access to documents as long you have access to your exchange, and, depending upon the security settings for individual documents, you can download and print them, as well.

In addition, you can recommend that colleagues be given access to the exchange. Your request will be forwarded to an exchange manager, who will invite the individual to the exchange if it is appropriate to do so. This chapter will acquaint you with all the major tasks that you will perform as a reviewer.

Displaying a document using an email alert

Exchange managers have the option of sending you an email alert when they publish documents for you to read. These alerts contain a link to the document they reference.

You may not receive an alert for every document that is posted for you. We recommend that you review your exchange regularly to be sure that you have seen all the documents that are available to you. For more information on viewing new or unread documents, see “To view only new documents” on page 24 and “To view only unread documents” on page 24.

Note: You can share alerts with other users who have permission to view the documents that are associated with them, but only those users who have been given permission to access a document will be able to display it.

▶ To display a document using an email alert

1. Click the link to the document that appears in the email alert.

2. If you are not currently logged into Intralinks Platform, the Intralinks login screen appears. Enter your email address and password and click Log In.
Your document and the Documents List within Intralinks Platform both are displayed.

Locating your exchange

**To locate your exchange**

1. Log into Intralinks. The **Hub** appears, displaying a list of all the exchanges in which you are a participant. Intralinks Platform exchanges can be recognized by a blue cube icon to the left of their name. For IL5 exchanges, an icon resembling a hand holding a white cube is displayed.

   If you are a member of only one exchange, that exchange appears automatically when you log in. The **Hub** is not displayed.

   If you are unfamiliar with logging in, see “Logging into Intralinks” on page 8.

2. Scan the list for the exchange you want, and double-click the exchange name.

Viewing documents

All the documents that you have permission to view appear in the **Documents List**.

Depending upon the security settings for the document you select to view, you may be required to enter your Intralinks ID and password before opening the document.

**To view documents within Intralinks**

1. Open your exchange.

2. Click the **Documents** tab on the top of the screen. The **Document List** appears.

3. Locate the document. Double-click it, or click on it to highlight it, and then select **Open Document** from the **More Actions** menu.

   You can use the Search tools to locate the document. For more information about searching, see “Finding documents” below.

   If you download a file that may contain malicious content, a message will appear to warn you of the risk and give you the option not to continue with the download. The warning is based upon the type of file that you selected, not the actual content of the file. The message does not appear for file types that are commonly used by Intralinks’ clients.


Finding documents

Depending upon how your exchange has been set up, you can perform either basic searches or full-text searches. Basic searches find terms only if they appear
in document or folder titles or notes. Full-text searches also find terms within the contents of the documents on the exchange.

See “Tips for using Intralinks’ search tools” on page 26 for information on performing searches using Boolean operators, using wildcards in your searches, searching for negative numbers and special characters and other tools for finding the information that you want.

To search for a document

The Documents tab should be displayed.

1. Enter your search term in the Search box in the upper right corner of the Intralinks Platform screen, then click Go. A list of documents that contain your search term is displayed.

   The search results you see are based on basic document information (the documents’ titles and notes). If the exchange manager has chosen to enable full-text search, all the contents of the documents are searched, as well.

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

2. To open the document you wish to review, highlight it and click the Open Document button near the top of the screen.

   If you download a file that may contain malicious content, a message will appear to warn you of the risk and give you the option not to continue with the download. The warning is based upon the type of file that you selected, not the actual content of the file. The message does not appear for file types that are commonly used by Intralinks’ clients.

   This message will appear if you select any file with one of the following extensions: *.ade; *.adp; *.asd; *.asf; *.asx; *.bas; *.bat; *.chm; *.cif; *.class; *.cmd; *.com; *.cpl; *.crt; *.dat; *.dll; *.exe; *.hcp; *.hlp; *.hta; *.hit; *.htm; *.html; *.inf; *.js; *.jse; *.lnk; *.mda; *.mdb; *.mdc; *.mdw; *.mse; *.msp; *.nws; *.ocx; *.pif; *.p; *.pm; *.pot; *.pps; *.reg; *.scr; *.sct; *.shb; *.shs; *.sys; *.vb; *.vbe; *.vbw; *.vbw; *.vsf; *.vws; *.wmd; *.wms; *.wms; *.wsc; *.wsf; *.wsh; *.xlt; *.x1w; *.zlb

To view only new documents

The Documents tab should be displayed.

1. Click the arrow that appears to the left of the New Since folder in the Smart Filters area on the left side of the screen. A number of filtering options appear: Last Login, Last 24 Hours, Last Week and Last Month.

   (If the smart filters are not displayed, click on the Filters button to hide the folders list and display the filters.)

2. Click the option that you want to use. The documents list displays all the documents that match the period of time that you specified.

Depending upon the way your exchange has been set up, the New Since folder may not appear on your exchange.

To view only unread documents

The Documents tab should be displayed.
1. Click the **Advanced Filter** smart filter. The **Exchange Filter Criteria** screen appears, allowing you to select a variety of options for limiting the information that is displayed.

   (If the smart filters are not displayed, click on the **Filters** button to hide the folders list and display the filters.)

2. To view only documents you haven’t read yet, mark the **Unread Only** option.

3. Click **Filter**.

   ► **To view documents that were available on a previous date using the Historic Filter**

   The **Documents** tab should be displayed.

1. Click the gear icon 🔄 that appears below the search box to display the Tools menu. Select **Historic Filter** from the menu. The **Historic Filter Criteria** window is displayed.

2. Choose one of the viewing options from the **List by** list:

   - **Date** — Use this option to view all the documents that were available on a particular date in the past. Only the documents that were available to you on that date will be displayed.

   - **Date Range** — Use this option to view all the documents that were available during a particular time period. Documents that were available at any point during the time period will be displayed.

   - **Saved View** — If you have saved a particular view (for example, a filtered list of documents that are relevant to a task that you are performing), use this option to redisplay the view you saved.

   Depending upon your selection, additional fields will be displayed, allowing you to select the date, date range or saved view that you want.

3. Click **Filter**. The documents that were available at the specified time are displayed.

4. When you have finished viewing the historical view, select **Historic Filter** from the Tools menu again to redisplay the standard (current) view of your exchange.

   ► **To create a saved view for historic filtering**

   The **Documents** tab should be displayed.

1. Display the documents that you want to include in the view.

2. Click the **Save Current View** button at the top of the screen. The **Save Current View** window is displayed.

3. Enter a name for the view, and click **Save**.

   ► **To search for documents across multiple exchanges**

   You can search multiple exchanges at the same using a variety of filters to limit the search results to relevant documents.

   **Note:** Exchanges that use enhanced security must be open if you want for them to be included in your search results.
1. If the **Hub** is not displayed already, click the **Hub** button to display it.

2. Select the **Documents** tab to display the Documents List.

3. Enter your search term in the search box, then click **Search**. A list of documents that contain your search term is displayed.

   The search results you see are based on basic document information (the documents’ titles, keywords and notes). If one or more exchange hosts have chosen to enable full-text search, all the content of documents for those exchanges is searched, as well.

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

4. (Optional.) If you want to limit the number of documents that appear in your search results, make selections in the **Refine your results** section of the screen. You can limit your search to particular exchanges, organizations, tags and file types. Only the items you select will be included in your search.

5. (Optional.) If you want to further refine your search, click the **Advanced Search** link below the search box. Using the Advanced Search screen, you can search for documents using a wide range of criteria, including working sets that contain the document, exchanges, tags, file types, document creator, and others.

6. To open the document you wish to review, double-click it.

7. (Optional.) If you want to save your search criteria for use again in the future, click the **Save** link at the top of the Documents List. A box appears allowing you to name your search.

   To use saved search criteria in the future, click the arrow next to the search field. A list of all your saved searches appears. Select the search criteria that you want to use; the documents matching those criteria are displayed.

8. To clear your search results and perform a new search, click the **Clear** link at the top of the Documents List.

   ▶ **To view a URL that can be used as a shortcut for your document**

   The **Properties** screen for documents includes a URL (Web address) for the document that you have selected. You can click the link to display the document. You also can copy the link and create a shortcut for it in your Internet browser, or send it to colleagues. (They must have permission to view the document in order to display it.)

   The **Documents** tab should be displayed.

   1. Display the document whose URL you want to view.

   2. From the **More Actions** menu, select **Properties**. The **Properties** screen for the selected document is displayed.

   3. Locate the **Document Link** field. Either click the link to display the document or copy the text to paste into your browser or an email message.

**Tips for using Intralinks’ search tools**

Use the tips below to get the most out of Intralinks’ powerful search function.
Searching for a phrase
To search for a particular phrase, place the phrase in double quotation marks: "Quarterly statements"

(If you do not use double quotation marks with your phrase, your search results will include all documents that include the words you entered, even if the words are separated from one another.)

Searching for negative numbers
To search for a negative number, use a minus sign and place the entire number, including the minus sign, in double quotation marks: "-550.00"

Omitting words from your search results
To prevent documents that contain particular words from appearing in your search results, type a minus sign before the terms you want to omit: quarterly -Q2

Finding documents that contain two or more words
To find documents that contain two or more words, simply type the words with a space between them: regulated legal

In the example above, only the documents that contain both regulated and legal would be listed in your search results.

Finding documents that contain one word or another
To find documents that contain one word or another one, but not both, type OR (uppercase) between the terms: regulated OR legal

In the example above, documents that contain both regulated and legal would be omitted from your search results.

Using special characters in your searches
Some characters are used for particular purposes by the Intralinks search tool. These characters include: - \ " < > [] {} : ~ ^

To include any of these characters in a search term, type a backslash (\) character in front of it: 4:00 o'clock

Using wildcards to find variations of your search terms
Two characters, the question mark (?) and the asterisk (*), can be used to find variations of your search term. When you use these characters, the search function will "fill in the blanks."

To replace a single character, use the question mark. In the following example, all documents for Q1, Q2, Q3 and Q4 2009 will be displayed: Q? 2009

You also can use multiple question marks. In the following example, all documents containing references to the 20th century will be displayed: 19??

To find all variations regardless of the number, use the asterisk. The following example will return documents that include document, documents, documented and documentation: document*
Searching only the documents that appear in the documents list
You can limit your search to the documents currently displayed on the screen by clicking the arrow icon in the Search box, then selecting This View.

Searching only the titles and notes for documents and folders
You can limit your search to the titles, notes and other information that appears on folders’ and documents’ Properties screens. To do this, click the arrow icon in the Search box and mark the Document & Folder Properties option; if you see a Document Content option, be sure that it is unmarked. (This option does not appear on all exchanges.)

Finding documents using smart filters
Smart filters provide alternative views of the documents that appear on your exchange. These filters can improve your productivity by giving you easy access to recently added documents, unread documents, and documents that you have indicated are your favorites — that is, the documents you return to most often or that hold information that is most important to you.

With the exception of the Favorites filter, the contents of the smart filters folders are updated automatically as documents are added to the exchange and as you read the documents.

When you add documents to Favorites, copies of the documents are placed in the Favorites folder. The original documents remain in the folders from which they were copied.

▶ To view the contents of a smart filter
◊ Click on the smart filters folder whose contents you want to view. The documents in the folder appear in the Documents List on the right side of the window.

▶ To add documents to the Favorites menu
◊ Click on the document you want to add to the Favorites menu, then click the Add to Favorites button near the top of the screen.

Downloading documents
Note that the security settings applied to the documents you select may prevent you from downloading the documents or from opening downloaded documents unless you enter your credentials (Intralinks ID and password).

▶ To download a document
1. Locate the document you wish to download, and click on it to highlight it.
2. Click the Download button at the top of the screen. A message asking you whether you want to open or save the document appears.
3. Click Save. A Save As dialog box appears.
4. Choose a location on your local drive for the document, and click Save.
Bulk downloading documents from a single exchange

You can download several documents within an exchange at once; you can even download all the documents in several folders on the exchange at the same time if you like. The process is similar to downloading a single document.

**To download multiple documents**

1. In the Documents List, highlight the documents and/or the folders whose contents you want to download. You can select multiple documents and folders at the same time by pressing the **SHIFT** or **CTRL** key while clicking the items to highlight them.

2. Click the **Download** button at the top of the screen. A message asking you whether you want to open or save the document appears. Click **Save**.

3. Choose a location on your local drive for the documents, and click **OK**.

If you download a file that may contain malicious content, a message will appear to warn you of the risk and give you the option not to continue with the download. The warning is based upon the type of file that you selected, not the actual content of the file. The message does not appear for file types that are commonly used by Intralinks’ clients.


Bulk downloading documents from multiple exchanges

Using 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 may be required to view protected documents or attachments in the Intralinks environment 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.

**Note:** If you are using a Macintosh computer, or a Windows browser other than Internet Explorer, you may need to use an alternative version of Download Wizard. If Download Wizard does not appear when you perform step 1 below, select **Compatibility Download** from the Tools menu, then repeat the procedure below. Note that with this version of the Download Wizard you cannot print or view documents. Click the gear icon that appears below the search box to display the Tools menu.

**To download documents using Download Wizard**

If the **Hub** is not already displayed, roll your mouse over the exchange name in upper left corner of the screen and select **Hub** from the list that appears.
1. Click the **Download** button at the top of the screen.

2. If you have not run Download Wizard previously, a message appears asking whether you want to run Download Wizard, which is a separate application. Click **Run**.

3. Download Wizard’s **Select Items** view appears. Click the **Show all exchanges** button to display a list of the exchanges to which you have access.

4. 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.

5. 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 **Target** list. Continue selecting items until you have selected all the items that you want to download.

6. Click **Next**. The **Locations & Settings** view of the wizard appears.

7. 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.

8. Click **Next**. The **Download** view of the wizard appears.

9. Review your selections. Highlight an exchange to see all the documents that will be downloaded from it. Click the **Back** button to make any needed changes.

10. 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.

    If you download a file that may contain malicious content, a message will appear to warn you of the risk and give you the option not to continue with the download. The warning is based upon the type of file that you selected, not the actual content of the file. The message does not appear for file types that are commonly used by Intralinks’ clients.


11. 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.

12. Click Close.

Printing documents

Note that security settings for individual documents may prevent you from printing some of the documents that you select.

To print a document

1. Locate the document in the Documents List, and click on it to highlight it.
2. From the More Actions menu, select Print Document. The Print dialog box appears.
3. Review the options in the dialog box, and click OK.

To print all the currently displayed documents

You can use the following steps to print all the documents that appear in the Documents List.

1. From the More Actions menu, select Print Documents in This View. A Print screen appears listing all the documents on the exchange, along with details about the document, such as the file type and number of pages.
2. Review the documents in the list. To remove a document from the list, highlight it and click Remove Selected.
3. When you are satisfied with the contents of the list, click Print to begin printing.

To print all the documents on the exchange

The Documents tab should be displayed.

1. From the More Actions menu, select Print All Documents. A Print screen appears listing all the documents on the exchange, along with details about the document, such as the file type and number of pages.
2. Review the documents in the list. To remove a document from the list, highlight it and click Remove Selected.
3. When you are satisfied with the contents of the list, click Print to begin printing.

Working with protected documents

What is document locking and protection?

Document locking and protection — also known as Information Rights Management, or IRM — provides an added level of security for documents in PDF or Microsoft Office (Word, Excel and PowerPoint) format. Exchange managers may have a variety of reasons for protecting documents, but generally, document protection is applied to documents that contain sensitive or confidential
information that should not be shared with people who have not been given permission to view it.

With document locking and protection, users are either:

- Prevented from downloading documents from an exchange to their computer or network, or
- Required to enter their email address and Intralinks password before opening a downloaded copy of the document, which is encrypted.

The document format and browser that the individual is using determines whether the file can be downloaded or must be viewed online.

Exchange managers and publishers can determine whether protection will be applied to individual documents. In addition, exchange managers and publishers can prevent users from printing protected documents.

Protected documents can be identified in the Documents List by a lock icon that appears to the left of the document name. If the document is protected and printing is not allowed, a printer icon appears with a red X on top of it.

For more information, read the sections below.

Document protection capabilities

Intralinks’ document protection solution includes the following capabilities:

- Supports access to protected documents on Windows and Mac OS.
  - Supports Microsoft Office 2007, 2010 and 2013 documents (Windows), including those that have been digitally signed.
  - Supports Microsoft Office 2009 and 2011 documents (Macintosh), including those that have been digitally signed.
  - Supports PDF documents.

- Allows watermarks to be placed diagonally across documents, Watermarks appear when documents are displayed onscreen and on printed documents. Watermarks cannot be applied to Excel documents that contain dynamically generated charts or graphs or to Excel 2003 documents. Watermarks can be applied to Excel documents that contain static images if they were created using Excel 2007 or a later version. Watermarks can be positioned only at a diagonal across the center of the document; there are no options for placing them in other areas of the page.
  
  Note that watermarks cannot be applied to documents, including Excel documents, that include dynamic charts or graphs.

- Prevents users from making screen captures using the Print Screen key or Microsoft’s Snipping Tool, but screen captures can be made using a third-party tool like Techsmith Corporation’s Snagit®. (The disallow use of Print Screen exchange option must be enabled.)

- Allows permissioned users of Microsoft Excel documents to perform a limited number of actions that allow the users to perform ad hoc analysis
while maintaining document security. Supported actions include resizing of cells, editing of cell values, ability to add columns and rows, and the ability to sort data. Users cannot save the changes they make.

- Allows users who are logged into Intralinks Platform or are connected to their organization’s network via SSO or Exclusive Single Sign-On (e-SSO) to view downloaded copies of protected documents without first entering his or her credentials.

- Supports Single Sign-On (SSO) for both Windows and Mac OS.

Requirements
In most cases, you will not have to take any action in order to view protected documents — you can simply enter your email address and Intralinks password, and the file will open.

Adobe Reader 10 or a later version is required in order to view protected PDFs. Files must be viewed in Adobe Reader; they cannot be viewed directly within a web browser or any other PDF reader application.

When you attempt to open a protected Microsoft Office document in a new browser for the first time, a message will appear asking you to download and open a registration file within a specified period of time. When you open the file, the browser is registered and the protected Microsoft Office file is opened. You will not be asked to register that browser again unless you remove the “cookie” files associated with the browser.

Performing ad hoc analysis using IRM-protected Excel documents

If you have been permissioned to use Microsoft Excel documents protected, you can perform a limited number of actions that will allow you to perform ad hoc analysis. You cannot save the changes that you make.

You can perform the following tasks:

- Resize cells
- Edit cell values
- Add columns and rows
- Sort data

You cannot perform the following actions:

- Create pivot tables
- Create graphs
- Save changes using either the Save or Save As command
- Copy protected files’ contents
- Print protected documents, if the Protect/No Print option has been selected for them

You can manipulate data only in Microsoft Excel documents. No changes can be made to other protected document types.
You can perform ad hoc analysis on documents created using Microsoft Excel 2007 or later (Windows) or Excel 2011 or later (Macintosh). Analysis can be performed using documents that are protected using either the Protect or Protect/No Print option.

**Viewing PDF and Microsoft Office documents using Intralinks Viewer**

Depending upon how an exchange is set up, you may be able to view PDF documents and Microsoft Excel and Word files using Intralinks Viewer.

**Note:** Intralinks Viewer is not available on all exchanges and may not be available to you. “Enabling Intralinks Viewer” on page 30

Intralinks Viewer is an alternative to Adobe Reader and similar tools.

As you use Intralinks Viewer, you will find many of the functions that are found in Adobe Reader and other PDF viewers, including search, zoom and navigation tools. Functions that cannot be used with protected PDFs, such as text touchup and commenting, are not available.

Depending upon how Intralinks Viewer has been set up on your exchange, you may be allowed to use Intralinks Viewer only for documents that have printing or downloading restrictions, or for all PDF, Excel and Word documents on the exchange. If Intralinks Viewer is not used for unprotected files, they are displayed in your Internet browser, Excel, Word or Adobe Reader or Acrobat, depending upon how your Adobe software is set up.

**Using Intralinks Viewer**

Adobe Flash Player 9 or a later version must be installed on your computer in order for you to use Intralinks Viewer. No additional software is required.

**Using the Curtain**

If the Disallow use of Print Screen exchange setting is enabled, a “curtain” appears over documents, obscuring the text, when you first display the documents in Intralinks Viewer. The curtain prevents others from reading text on your screen. To view the document, click the message that appears in the middle of the screen and press the ENTER key until the document is displayed. The curtain reappears if you select another document or application.

If the Disallow use of Print Screen exchange setting is enabled and you attempt to make images of your screen while a document is visible in the Intralinks Viewer window, the message *Data Protection Policy Applied* will appear when you attempt to paste the screen image. You can use the print screen key when Intralinks Viewer is in the background and the curtain is displayed, however. (Only the curtain, and not the document’s contents, will be displayed.)

**Using the Spotlight**

Intralinks Viewer’s Spotlight function allows only a few lines of text to be displayed at once. You can use the Spotlight to limit the amount of text that is displayed, preventing unauthorized people from viewing the document as you read it in public areas such as airports. You can resize the Spotlight if you like. To use the Spotlight, click the Spotlight icon at the top of the Intralinks Viewer screen. To
resize the Spotlight, adjust the slider tool that appears to the right of the Spotlight icon.

Navigating through documents
You can view documents using the scroll bar on the right side of the Intralinks Viewer screen or the tools that appear in the bar at the top of the screen. You also can use the toolbar at the top of the screen (shown below) to zoom in, zoom out, reset the zoom to 100%, search for particular words or phrases, display the next or previous page using arrow buttons, or go to a specific page in the document.

If you are viewing a PDF document with bookmarks, you can click the bookmarks icon to display the document’s bookmarks. If the PDF document includes documents, click the attachments icon to display a list of attachments. Similarly, click the comments icon to view any comments that have been added to the document. (These icons do not appear if the PDF document does not include these items.)

Printing documents
You can print documents that appear in Intralinks Viewer. (Protected documents for which the Prevent print option has been selected cannot be printed, of course.)

To print a document, click the printer icon on the upper left side of the Intralinks Viewer screen:

When you print a PDF document, a box appears allowing you to select a range of pages to print. After you have made your selection, click Print to display a Print dialog box, where you can select the printer that you want to use.

When you print an Excel spreadsheet, a box appears allowing you to print the current worksheet, another worksheet, if the document includes multiple worksheets, or the entire workbook (all the worksheets in your document). After you have made your selection, click Print to display a Print dialog box, where you can select the printer that you want to use.

Using the PRINT SCREEN key
You cannot make images of your screen while a document is visible in the Intralinks Viewer window. If you attempt to do so, the message Data Protection Policy Applied will appear when you attempt to paste the screen image. You can use the PRINT SCREEN key when Intralinks Viewer is in the background and the curtain is displayed, however. (Only the curtain, and not the document’s contents, will be displayed.)
Chapter 4: Publishing documents

Overview

In this chapter you will learn how to:

• Create folders
• Add, replace, move and delete documents
• Use Multi-file Uploader to add multiple documents at the same time
• Alert users when new documents are available
• Copy and paste documents
• Use document collections, known as working sets, to perform tasks
• Prevent other users from updating documents using the checkout process

Before you begin

Important! You may not be able to perform the tasks performed in this chapter. Exchange managers are responsible for determining whether users with the Reviewer and Previewer role are allowed to publish documents to the exchange, and if they can, which folders are available for publishing. If you are unsure whether you have the ability to publish documents, consult an exchange manager.

If your role is Reviewer Plus, you cannot publish documents to this exchange.

In order to perform the tasks in this chapter, Adobe Flash Player 9 must be installed on your computer.

When you select an Intralinks Platform exchange in the Intralinks Hub, a message will appear if Flash Player 9 is not installed. This message includes links to information about the Flash Player software and to a location on the Adobe website where you can download this free software utility. Your organization’s IT department may be required to install this software for you.

If Flash Player 9 is not installed, you can open the exchange, but you will be able to perform only basic reviewer-related tasks like reading and printing documents.

Managing folders

Creating folders

Folders are used to organize the contents of your exchange and to group related documents.

The exchange managers may have given you the ability to add subfolders within one or more folders on the exchange that you use. If this is the case, you also can rename the folders and edit custom field values for them.
To create a folder

The Documents tab should be displayed.

1. Open the folder where you want the new folder to appear.
2. Click the Add Folder button near the top of the screen. The Add New Folder screen appears.
3. Add a title that clearly describes the contents that will appear in the folder.
   Note that the following characters cannot appear in folder titles:
   / \ : * " < > ? |
4. You can add notes about the folder if you like. These notes can be viewed by any user who has access to the folder. For this reason, do not include information that should not be seen by reviewers. The notes are for reference purposes only and will not appear on reports.
5. Depending upon the way the exchange is set up, either a Save button or a Next button appears.
   If a Save button appears, your entries are complete. Click Save to create the folder. Skip the remaining steps in this procedure.
   If a Next button appears, custom fields are being used for folders.
6. Custom fields provide a structured way for you to describe your folders in greater detail. Custom fields enable you to enter specific pieces of information, such as expiration dates, locations, and the like. You could use the Notes field in the first step of the wizard to keep track of this information, but with custom fields you can more easily manage the information and ensure that it is entered consistently.
7. Make an entry or selection for each field that applies to this folder. Required fields are marked with an asterisk (*).
8. Click Save.

Moving folders

If your exchange managers have given you permission to create folders, you also can move them to other folders that allow you to add documents.

Folders can be moved simply by dragging them to the desired location.

If you want to undo a move action, select Undo Move from the More Actions menu, or simply drag the folder back to its original location.

Renaming folders and changing custom field values

If your exchange managers have given you permission to create folders, you also can rename them and change their custom field values. In some cases, you may be able to change custom field values for the folder that contains the files and folders that you have added.

Information that describes a folder — its name, notes about it and any custom field values that have been selected for it — are referred to as folder metadata.
To rename folders and change other folder metadata

1. Highlight the folder that you want to change.
2. From the More Actions menu, choose Properties. The properties screen for the folder appears.
3. Review the name and notes about the folder and make any needed changes.
4. If a Custom Fields tab is displayed, click it to view the current values selected for the folder. Make any needed changes.
5. When you have finished making changes, click OK.

Adding documents

Documents are the heart of any exchange. Use the New Document Wizard to quickly add documents to your exchange and to select the groups of users who will be able to view and work with them. You also can alert other users that the documents are available for use.

Using the New Document Wizard

The New Document Wizard is a series of screens that enable you to add documents and document placeholders to your exchange.

You can add up to 20 documents to a single folder at the same time. The total size of the documents cannot exceed 2GB. The permissions, notes and alert options that you enter or select will be applied to all the selected documents.

You also can use the New Document Wizard to create placeholders if you’re setting up your exchange and you do not have the files that you plan to add to the exchange at hand. You then can add the documents at a later time. For more information, see “Replacing a placeholder with a document” on page 41.

Important: If your exchange is in the open phase, do not permission users until you replace the placeholder with the actual file you want the users to view.

You can enter a combination of documents and document placeholders at the same time if you like.

Depending upon how your exchange has been set up, some of the screens below may not appear. If this is the case, simply skip to the next section and continue entering information about the documents or placeholder.

To add one or more documents or placeholders

The Documents tab should be displayed.

Select the document and set its properties

1. Open the folder that will contain the new document or placeholder.
2. Click the Add Document button near the top of the screen. The Set Properties view of the New Document Wizard appears.

If you are adding only placeholders, skip to step 5. If you are adding documents, continue to step 3.
3. To add documents, click the **Choose Files** button. The **Select File(s) to Upload** dialog box appears.

4. Highlight the file or files that you want to add to the exchange and click **Open**. Information about the file, including its title and file type, are displayed in the New Document Wizard.

   You can select multiple files at the same time by pressing the **SHIFT** or **CTRL** key while clicking the files to highlight them.

   Note that the names of the files you select cannot contain the following characters:
   `/\:*"<>?|`

5. To add a placeholder, click the **Add Placeholder** button. You can add as many placeholders as you like.

6. If you want to enter a more descriptive title for the documents, enter the new name in the **Document Title** field. The original file on your computer or network drive will not be affected.

   If you are adding placeholders, you must enter a title for each placeholder in the **Document Title** field.

   Note that the document title cannot contain the following characters:
   `/\:*"<>?|`

7. (Optional.) Enter a note that provides additional information about the documents, as an aid to viewers. For example, you could add a note that provides a brief description of the documents’ contents, or you could provide contextual information that would help viewers to better understand the documents’ purpose or contents.

   (Remember, if you are adding multiple documents or placeholders, the same note will be applied to all the items being added. If necessary, you can edit the note for individual documents by highlighting each document and selecting **Properties** from the **Actions** menu.)

8. (Optional.) If you entered a note in step 7, you can choose to display it automatically when users view the documents. To do this, mark the **Display note before opening document** option.

9. (Optional.) You can change the location on your exchange where the documents will appear. To select another location, click the **Browse** button next to the **Folder Location** field.

10. (Optional.) If you want the documents to appear in a new sub-folder within the folder that is selected in the **Folder Location** field, enter a name for the new folder in the **Folder name** field.

    If you leave the **Folder name** field blank, the documents will appear in the folder shown in the **Folder Location** field.

11. (Optional.) If a website or a particular webpage is associated with the document, click the **Add Link** button to enter the URL (Web address) for it. Your entry will appear as a clickable link on the **Properties** screen for the document, and in email alerts.

12. Click **Next** to continue entering information about your document.

   If you are creating placeholders and you do not wish to enter more information at this time, click **Save**. You can enter information on the remaining tabs when you replace the placeholders with actual documents.
Add tags to the document(s)

Depending upon how your exchange is set up, you may have the option of using tags to organize the documents on your exchange. These tags offer great flexibility in classifying and organizing information in ways that are meaningful to your organization. For example, using tags you can classify and locate documents dealing with Canadian commodity contracts no matter where they are located in the exchange.

The tags that are assigned to documents appear in the documents list, and users can use them when searching for documents.

Up to 25 tags can be assigned to each document. Tags are optional, and these steps can be skipped.

Complete the following steps to assign tags to the document or documents.

1. A list of all the tags for this exchange appears in the Available tags list. Highlight each tag that applies to the document and click the arrow button to move the tag to the Selected tags list on the right side of the screen.

   You can select multiple tags at the same time by pressing the SHIFT or CTRL key while clicking the tags to highlight them.

2. Click Next.

Enter information in custom fields

Custom fields provide a structured way for you to describe your documents in greater detail. Custom fields enable you to enter specific pieces of information, such as expiration dates, locations, and the like. You could use the Notes field in the first step of the wizard to keep track of this information, but with custom fields you can more easily manage the information and ensure that it is entered consistently.

1. Make an entry or selection for each field that applies to these documents.

2. Click Next.

   Note: when printing is allowed, the file can be printed not only to paper but also to other file types using the browser’s “Print As” function. Copies created using “Print As” are no longer signed or protected documents, even though the original file was protected. Clients who are concerned that downloaded protected files may be saved in this fashion should select the Protect/No Print option for their documents.

Alert users that the document(s) are available (optional) or save your changes

In the final step of the New Document Wizard, you can select users who will be alerted by email that the documents have been added to the exchange and are available for viewing. Intralinks provides a standard alert message that identifies the documents and provides a link to them. You can add a custom note to the alert message if you like.

Important! You are not required to send alert messages to users; however, if you do not, be sure to click the Save button to ensure that the information you entered in previous views of the Wizard is retained. (See step 4 below.)
Typically you do not alert users when placeholders are added. If you are adding only placeholders, click the Save button to save your entries.

1. Review the subject that will be used for the email alert and make any needed changes.
2. If you entered a note on the Set Properties tab, it appears in the Notes field on this tab. You can edit or remove the note if you like, or add a note if none is displayed. The note will be included in the alert.
3. A list of permissioned users and groups appears on the bottom half of the screen. Mark the Alert option next to each group or user who will receive the alert. To send an alert to all the users and groups displayed on the screen, mark the All Permissioned Users option.
4. Click the Save button.

Replacing a placeholder with a document

Follow the procedure below when you are ready to replace a placeholder with an actual file from your computer or a network drive.

► To replace a placeholder with a document

The Documents tab should be displayed.

1. Highlight the placeholder.
2. From the More Actions menu, select Properties. The properties screen for the placeholder appears.
3. Click the Replace button. The Select File to Upload dialog box appears.
4. Highlight the file you want to add to the exchange and click Open. Information about the file, including its title and file type, are displayed on the properties screen.
5. If you want to alert other users that the document is available, click the Alerts tab. A window similar to the Alert Users view of the New Document Wizard appears.
6. Mark the groups you want to alert. If you wish to override the users' preferences for receiving exchange alerts or add a note to the alert, do so.
7. Click Save.

Adding multiple documents at the same time

If you want to add many documents to your exchange at once, consider using Intralinks Multi-file Uploader. This utility allows you to add up to 30 documents at the same time. We recommend that you upload no more than 50MB at once.

You can select one or more files or folders, as well as a combination of files and folders, to add to the exchange.

► To add documents using Multi-file Uploader

The Documents tab should be displayed.

1. If the Folders folder is not highlighted, highlight it.
2. Click the **File Uploader** button at the top of the screen. The Multi-file Uploader application is launched. (An informational message may appear, as well; if it does, review the information, then click anywhere on the screen to hide the message.)

The contents of your computer are displayed on the top half of the **Intralinks Multi-file Uploader** screen; this area is known as the *desktop area*. The contents of your exchange appear on the bottom half of the screen; this is known as the *staging area*.

3. A list of folders on your exchange appears on the left side of the staging area. Highlight the folder where you want to place new documents.

4. Select the files or folders in the desktop area and drag them to the staging area. They will appear in the folder that you selected in the previous step.

You can select several documents at the same time if you like. To do this, press the SHIFT or CTRL key while clicking on each document; continuing to press the SHIFT or CTRL key, drag the documents to their new location.

### Add custom fields to the document

If your exchange uses custom fields and your exchange role enables you to make selections for custom fields, the **Apply Custom Fields** screen appears when you drag documents to the staging area. Use this screen to make entries for the custom fields.

1. Make an entry or selection for each field that applies to this document.

   Depending upon your selections, additional fields may appear. Required fields appear in red, with an asterisk (*) next to them; you must make a selection for these fields before uploading the documents to your exchange.

2. Click **Apply**. The staging area reappears.

### Add a note about the documents

If you like, you can add a note that describes the documents or provides further information about them. This information will appear on the properties screen for each document.

1. From toolbar, select **Properties**. The **Properties** screen appears.

2. Enter your note in the **Note** field.

3. Click **Apply**.

### Alert users about the documents

If you like, you can send an email alert to let permissioned users know that the documents are available once they have been uploaded.

1. From toolbar, select **Alerts**. The **Send Alert** screen appears.

2. Mark the box next to each group that should be alerted.

3. If you want to override users’ alert preferences and have your alert sent immediately to all users, mark the **Deliver immediately (override user preferences)** option.

4. Review the default subject and note that will be used for the alert. If you wish to make a change, unmark the **Use default Subject text** and **Use default**
Message text options and make your entry in the boxes to the right of these options.

5. Click **Apply**.

**Upload the documents**

1. When you are ready to upload the documents, click **Upload**. The documents are added to your exchange, and a message appears asking whether you wish to view the Upload Log.

2. To view the log, click **Yes**. The log appears in a Microsoft Excel spreadsheet; it provides general information about the changes made to your exchange and a list of the files that were uploaded. If any files could not be uploaded, that will be noted, as well.

**Replacing or updating documents**

Use the following procedure to replace a document with a newer version.

**To replace a document**

The **Documents** tab should be displayed.

1. Highlight the document that you want to change.

2. From the **More Actions** menu, select **Properties**. The properties window for the document appears.

3. Click the **Choose File** button. The **Select File to Upload** dialog box appears.

4. Highlight the updated file and click **Open**. Information about the file, including its title and file type, are displayed in the properties window.

5. Click **Replace**.

**Moving documents**

In Intralinks Platform, moving documents is as easy as dragging them from their original location and dropping in the location where you want for them to appear.

You can select several documents and move them at the same time if you like. To do this, press the **SHIFT** or **CTRL** key while clicking on each document; continuing to press the **SHIFT** or **CTRL** key, drag the documents to their new location.

As a reviewer or previewer, you can move only documents that you have added to the exchange. Other documents cannot be moved. You can move documents only to folders where you are allowed to add documents.

(When you drag and drop documents in Intralinks, the documents are moved; they are not copied.)

If you want to undo a move action, click the **Undo Move** button in the menu bar at the top of the screen.

**Sending alerts**

Email messages alerting users about a document generally are sent when a document is created or updated. If you want to send a message to users at
another time, though — for example, to remind them to read a particular document — you can use the following procedures to do so.

**To send alerts for a individual document**

The Documents tab should be displayed.

1. Highlight the document for which you want to send an alert.
2. From the More Actions menu, select Alerts. The alerts window for the document appears.
3. For each user or group you want to receive an alert email, mark the Alert option. To send an alert to all exchange managers, mark the Auto Permissioned Users option.
4. If you want to override automatically permissioned users’ preferences to receive daily summary email alerts or no alerts, select Immediate from the Override Alert Preference list. This option does not appear for groups.
5. (Optional.) If you want to edit the subject line or add a note to the email alert, do so using the Subject and Note fields. Your note will appear in the body of the email message.
6. Click the Save button.

**To send alerts for multiple documents**

The Documents tab should be displayed.

1. Highlight the documents for which you want to send an alert. Do this by pressing and holding the SHIFT or CTRL key while you click each document to select it.
2. From the More Actions menu, select Alerts. The alerts window for the document appears.
3. For each user or group you want to receive an alert email, mark the Alert option. To send an alert to all exchange managers, mark the Auto Permissioned Users option.
   
   The users you select will receive an alert only for the documents for which they have permission to see or control. They will not receive any sort of notice about documents they cannot view.
4. If you want to override automatically permissioned users’ preferences to receive daily summary email alerts or no alerts, select Immediate from the Override Alert Preference list. This option does not appear for groups.
5. (Optional.) If you want to edit the subject line or add a note to the email alert, do so using the Subject and Note fields. Your note will appear in the body of the email message.
6. Click the Save button.

**Deleting documents**

To delete a document, follow the procedure below or simply highlight the document and press the DELETE key. Use care when deleting documents; once a document has been deleted, the action cannot be undone. If you are a reviewer or
previewer, you can delete documents only if you added them to the exchange; you cannot delete documents that were added by other people.

To delete a document from your exchange

The **Documents** tab should be displayed.

1. Using the Documents smart filters, locate the document that you want to delete. Click the document to highlight it. To select multiple documents, press the **SHIFT** or **CTRL** key while clicking the documents to highlight them.

2. From the **More Actions** menu, select **Delete Document**. A message appears asking you to confirm your decision.

   Note that if you remove a document from the exchange by mistake, the action cannot be undone; if you have a copy of the document on your computer or a network drive, you will have use that copy to re-add the document to the exchange as though it were a new document.

3. Click **Delete**.

Copying and pasting documents

You can copy any document or folder and paste it into another location on the exchange or into another exchange if you have the rights to add folders and documents in the new location. (That is, if you are a manager or publisher on the exchange where you want to paste the items.)

To copy and paste documents

◊ To copy and paste documents, use the **Copy Document** and **Paste Document** commands on the **More Actions** menu.

Using working sets to copy documents from one exchange to another

To learn how to create and manage working sets, see “Creating working sets” on page 41.

To copy the documents in a working set to another exchange

If the **Hub** is not already displayed, roll your mouse over the exchange name in upper left corner of the screen and select **Hub** from the list that appears.

1. Select the **Documents** tab on the left side of the screen. The working sets that you have created appear in the lower left area of the screen.

2. Right-click the working set that contain the documents that you want to copy. A menu appears.

3. Select **Copy Documents**.

4. An informational message appears. Read the message, then click **Close**.

5. Display the exchange where the documents are to be copied and highlight the folder where you want to paste the documents.
6. From the More Actions menu, select Paste Items. The Paste Options screen appears.

7. Mark the Document notes option if you want the notes associated with the documents in the working set to be pasted along with the documents.

8. Click Save.

9. An informational message appears, alerting you that the documents are being copied; you will receive an email message when the files have been copied. Click Close.

Checking out documents

You can use the Check Out command to lock any document that you have the ability to update. While a document is checked out, other users cannot make any changes to it; they will be able to view and print the document, however. Checking out documents prevents multiple versions of the document from being created.

Once a document has been checked out, only the person who checked it out, a manager with the Manager Plus exchange role or an Intralinks administrator can check the document in again.

► To check out a document

1. Highlight the document that you want to check out and select Check-Out from the More Actions menu.

   You can select multiple documents at the same time by pressing the SHIFT or CTRL key while clicking the documents to highlight them.

2. (Optional.) Enter a comment to describe your reason for checking out the document. This comment will appear on the document’s Properties screen while it is checked out.

3. Click Check-Out.

► To check in a document

◊ Highlight the document that you want to check back in and select Check In from the More Actions menu.
Chapter 5: Proposing and submitting questions

Overview

In this chapter you will learn how to:

• Propose questions
• Review proposed questions and submit them
• Submit new questions
• Create follow-ups to your questions
• Withdraw questions
• View FAQs

Before you begin

In order for you to perform the tasks in this chapter, Adobe Flash Player 9 must be installed on your computer.

When you select an Intralinks Platform exchange in the Intralinks Hub, a message will appear if Flash Player 9 is not installed. This message includes links to information about the Flash Player software and to a location on the Adobe website where you can download this free software utility. Your organization’s IT department may be required to install this software for you.

If Flash Player 9 is not installed, you can open the exchange, but you will be able to perform only basic tasks like reading and printing documents.

The question-and-answer process

No matter how comprehensive the documents on the exchange are, you are likely to have questions. You may want additional detail or a clarification, or perhaps you may want to request a document that does not appear on the exchange. Answers from the exchange’s managers can provide context or other insights, helping you to extract maximum value from the documents and make fully informed buying decisions. Intralinks Platform provides comprehensive question-and-answer functionality to make this process as efficient as possible.

Note that some exchanges that you belong to may not include the ability to ask questions. Q&A functionality is offered at the discretion of the organization hosting the exchange. If you see a Q&A tab on the top of the Intralinks Platform screen, Q&A is available to you.

Your buyer group can be assigned one or more question submitters. Only these people are able to submit questions; other members of your group must direct their questions to the submitters for review before they are submitted. This is to ensure that the Q&A process remains manageable for all participants.

Once a question is submitted, it is directed to a Q&A coordinator in the organization hosting the exchange. The host organization can have one or more
coordinators. The Q&A coordinator is responsible for answering — or getting an answer to — your question.

Once an answer has been provided, the submitter can submit a follow-up question if additional information is needed.

When all parties are satisfied that the question has been answered, the coordinator can close the question. No more changes are allowed to the question once it has been closed, but it remains available for all the members of your group to view.

Using the Q&A dashboard

When you click the Q&A tab, the Dashboard screen is displayed.

At the top of the dashboard, the Immediate Attention section identifies unread answers to your questions and unread FAQs. Click the Go button next to each item to display a screen that you can use to take action on the item.

You also can use the dashboard to review the number of questions that your group has submitted, the number of those questions that have been answered, and, if a question limit has been set for your group, the remaining number of questions that the group is allowed to submit.

To see detailed information about questions, click one of the following sub-tabs: Proposed, Submitted, Answered, All or FAQs.

Proposing questions

Any member of a buyer group, including question submitter(s), can propose questions and comment on them, but only the submitters can approve the proposed questions and submit them to the Q&A coordinator for an answer. Only members of your buyer group can see the questions your team has proposed.

(If the exchange manager has not enabled buyer discussions for your group, this capability is not available, and the question submitter must enter questions on behalf of other buyer group members.)

To propose a question

The Q&A tab should be selected.

1. Click the Dashboard, Proposed, Submitted, Answered or All tab.
2. Click the Add a Question button at the top of the screen. The Ask a Question screen appears.
3. Select the category that applies to this question. Be sure to select the category that best describes the question.
4. Select a priority for the message: High, Medium or Low. If a question limit has been set for your group, the question will be counted against that limit.
5. Enter a title for the question, along with any supporting details that may be needed to answer the question.
6. (Optional.) If necessary, you can attach additional documents from the exchange or your computer or network to the answer.
– If the document you want is located on the exchange, click the **Exchange Docs** tab and use the list that appears to locate the document. Highlight it, and click the **Attach** button.

– If the document is located on your computer or a network drive, click the **Local Docs** tab, then click the **Browse** button. A dialog box will appear, allowing you to select the document you want.

To select multiple documents, press the CTRL or SHIFT key while clicking on the documents. You can attach up to five documents.

7. **Click Add as Proposed.**

   An email alert will be sent to the question submitter(s) for your group, letting them know that a question has been proposed. The question also will appear on **Proposed** and **All** tabs for all the members of your buyer group; it will have a status of **Proposed**. The question will be assigned an ID, which can be used to track it through its lifecycle.

**To propose a question about a particular document**

The **Documents** tab should be selected.

1. Locate the document that you have a question about and highlight it.
2. **Click the Add a Question button at the top of the screen.** The **Ask a Question** screen appears.
3. Complete the fields on the screen. If you need further information about the fields, see the previous procedure, "To propose a question."
4. **Click Add as Proposed.**

   The question will appear on **Proposed** and **All** tabs for all the members of your buyer group; it will have a status of **Proposed**. The selected document will appear as an attachment to the question. The question will be assigned an ID, which can be used to track it through its lifecycle.

**To alert other group members to your proposed question**

Use this procedure to send an email message to other members of your group to let them know the proposed question has been added. Alerts can be sent until the question is submitted to the Q&A coordinator; they do not have to be sent at the time the proposed question is created.

The **Q&A** tab should be selected.

1. **Click the Proposed tab.** A list of questions appears.
2. Locate the question that you want to view, and select **Send an Alert** from the **Actions** menu that appears next to it. The **Send an Alert** screen appears.
3. Review the subject line and change it if you like. Enter a note about the proposed question.
4. Mark the **Send Alert** option next to your group’s name.
5. **Click Save.**

   An alert with your note and a link to the proposed question is sent to the members of your buyer group.
To respond to a proposed question

Note that some exchanges may not allow you to respond to the questions that have been proposed by other members of your group.

The Q&A tab should be selected.

1. Click the Proposed tab. A list of questions appears.
2. Locate the question that you want to respond to, and select Open from the Actions menu that appears next to it. The Question Detail screen appears, displaying information about the question.
3. If the Respond option is not selected already, select it.
4. Enter your comments in the Reply box.
5. (Optional.) Click the Related Documents tab and attach additional documents from the exchange or your computer or network to the response.
   - If the document you want is located on the exchange, click the Exchange Docs tab and use the list that appears to locate the document. Highlight it, and click the Attach button.
   - If the document is located on your computer or a network drive, click the Local Docs tab, then click the Browse button. A dialog box will appear, allowing you to select the document you want.

To select multiple documents, press the CTRL or SHIFT key while clicking on the documents. You can attach up to five documents.
6. Click Reply.

Reviewing and submitting a proposed question

If you are a question submitter, follow the steps below to review and submit the questions submitted by the members of your group.

To review and submit a proposed question

The Q&A tab should be selected.

1. Click the Proposed tab. A list of questions appears.
2. Locate the question that you want to respond to, and select Open from the Actions menu that appears next to it. The Question Detail screen appears, displaying information about the question.
4. Review the entries in the Category, Priority, Title and Question fields, and make any changes that are needed.

If your buyer group is allowed to ask a limited number of questions, a message appears at the top of the window telling you the number of questions that have been asked and the total number of questions allotted to your group. This is informational only, but keep in mind that you cannot submit more than the number of questions listed in the message unless you first withdraw previously submitted questions or the Q&A coordinator raises the question limit for your group.
5. (Optional.) Click the **Related Documents** tab and attach additional documents from the exchange or your computer or network to the response.

   – If the document you want is located on the exchange, click the **Exchange Docs** tab and use the list that appears to locate the document. Highlight it, and click the **Attach** button.

   – If the document is located on your computer or a network drive, click the **Local Docs** tab, then click the **Browse** button. A dialog box will appear, allowing you to select the document you want.

   To select multiple documents, press the CTRL or SHIFT key while clicking on the documents. You can attach up to five documents.

6. Click **Submit Question**.

**Submitting a new question**

If you are a question submitter, you can create your own questions, as well as review and submit questions that have been proposed by your team members. To create and submit a question, complete the step in “To propose a question” on page 48. When you have completed the question, click **Save as Submitted**.

The Q&A coordinator will be alerted by email to your question. When a reply is made, you also will be alerted by email.

**Viewing answers to your questions**

When a question is answered, you will receive an email alert containing a link to the answer. You can click the link to view the answer. You also can view answers by clicking on the **Answered** sub-tab when the Q&A tab is displayed.

**Following up on a response to your question**

If you are a question submitter and you still have questions after the exchange manager responds to your original question, you can follow up. You can follow up multiple times, as needed, so that you are able to get the information you need. If a limit has been set for the number of questions that your buyer group is allowed to ask, note that follow-ups do **not** count as questions and do not affect the number of questions asked.

**Note:** Once the Q&A coordinator has closed a question, you can no longer follow up on it.

**To follow up on a response to your question**

1. Click the **Answered** tab. A list of questions appears.

2. Locate the question that you want to follow up on, and select **Open** from the **Actions** menu that appears next to it. The **Question Detail** screen appears, displaying information about the question.

3. If the **Follow up** option is not selected already, select it.

4. Enter your question in the **Compose Followup** box.

   You can reinsert the title of the original question by clicking the **Re-Insert Original Question** link. If you want to include comments that you or other group members added to the question, click the **Quote Comments** link; the
Insert Quotes screen will appear, allowing you to select the comments that you want to add to the followup question.

5. (Optional.) Click the Related Documents tab and attach additional documents from the exchange or your computer or network to the response.

   – If the document you want is located on the exchange, click the Exchange Docs tab and use the list that appears to locate the document. Highlight it, and click the Attach button.

   – If the document is located on your computer or a network drive, click the Local Docs tab, then click the Browse button. A dialog box will appear, allowing you to select the document you want.

   To select multiple documents, press the CTRL or SHIFT key while clicking on the documents. You can attach up to five documents.

6. Click Submit Followup.

Withdrawing questions

You may wish to withdraw a question if it is no longer relevant or if your buyer group has been allowed a limited number of questions and you wish to replace a question that you have already asked with one that is more urgent.

Once a question is withdrawn, you and members of your buyer group can continue to view it, along with any answers and follow-ups made before it was withdrawn. Once it is withdrawn, however, it cannot be answered or followed up.

Once a question has been answered, it can no longer be withdrawn.

► To withdraw a question

The Q&A tab should be selected.

   1. Click the Submitted tab. A list of questions appears.

   2. Locate the question that you want to follow up on, and select Withdraw Question from the Actions menu that appears next to it.

   3. A message appears asking you to confirm your selection. Click the Withdraw Question button.

Viewing FAQs

FAQs — frequently asked questions — are an easy way for exchange managers to share information with all the members of your exchange. For example, the Q&A coordinator might use an FAQ to communicate key dates that are relevant to all exchange users.

Some FAQs may be based on questions submitted by your buyer group. If this is the case, any identifying information about your group will be removed before the FAQ is created to ensure your group’s anonymity.

► To view FAQs

The Q&A tab should be selected.

   1. To display a list of FAQs, click the FAQs tab.
2. Double-click the FAQ you want to view. The Frequently Asked Question screen appears, displaying the complete FAQ.

▲ To alert others to an FAQ

After you have viewed an FAQ, you may want to alert other members of your group who will find it useful. You can quickly send an email message to selected individuals. Use the procedure below to do so.

The Q&A tab should be selected.

1. Click the FAQs tab. A list of FAQs appears.
2. Locate the FAQ for which you want to send an alert, and select Send An Alert from the Actions menu that appears next to it. The Send an Alert screen appears.
3. Mark the Send Alert option next to your group’s name.
4. Click Save.

An alert with your note and a link to the FAQ is sent to the members of your buyer group.
Chapter 6: Completing tasks that are assigned to you

Overview

In this chapter you will learn how to:

- View tasks that are assigned to you
- Submit documents for review or approval
- Approve and reject documents, and ask for them to be resubmitted
- Request information
- Add co-monitors
- Rename a business process instance
- Cancel tasks
- Add comments to tasks
- Use the Process Monitor screen to manage processes and the tasks associated with them

Before you begin

In order to perform the tasks in this chapter, Adobe Flash Player 9 must be installed on your computer.

When you select an exchange in the Hub, a message will appear if Flash Player 9 is not installed. This message includes links to information about the Flash Player software and to a location on the Adobe website where you can download this free software utility. Your organization’s IT department may be required to install this software for you.

If Flash Player 9 is not installed, you can open the exchange, but you will be able to perform only basic reviewer-related tasks like reading and printing documents.

What are business processes?

Business processes are predefined interactions that are designed to control the flow of documents and ensure that they are handled in a consistent way. These interaction can be as simple as the submission of a weekly progress report or as complex as a document review requiring multiple levels of approval.

Business processes serve as templates from which exchange users can create business process instances — the actual requests for approval or for documents. Intralinks provides several types of business processes for you to use. Business processes serve as templates from which exchange users can create business process instances — the actual requests for approval or for documents. Intralinks provides several types of business processes — standard, rules based and multi-task.
Standard processes can be set up quickly and are used in situations where both the people and documents involved are known. Rules-based processes require a bit more setup effort, but they offer great flexibility in selecting documents, users and groups — even those that do not exist yet. Rules can be based on a variety of information about the users, groups and documents, including the entries that have been made for them in custom fields. (This information is referred to as \textit{metadata}.)

Multi-task processes combine elements of standard and rules-based processes and can be used to manage and coordinate many tasks related to a single activity.

Standard processes include:

- Document date trigger
- Document submission for approval
- Document submission with two-step approval
- Document submission (without any approval)
- Document submission for review
- Request for documents

Rules-based processes include:

- Group-triggered document distribution
- Rules-based document distribution
- Rules-based submission

Business processes can be created only by those with the Manager Plus role. Users with any role can be \textit{task initiators} (submitters or requesters of documents) or document reviewers.

\textbf{Standard processes}

\textbf{Document date trigger}

In this standard business process, alerts will be sent to specified exchange members based on dates associated with documents. For example, this process can be used to alert you if the expiration date for a license or contract is approaching.

\textbf{Document submission for approval}

In this standard business process, a submitter sends a document to a reviewer, who can:

- Accept the document
- Reject the document
- Request that it be resubmitted with changes

If the document is accepted or rejected, no further action is required; the business process instance is considered complete.
Document submission with two-step approval
This standard business process is a bit more complex, but is fundamentally the same as the document submission for approval. In it, a submitter sends a document to an initial reviewer who can accept or reject the document or request that it be resubmitted. If the initial reviewer accepts the document, it is submitted to a second reviewer, who also can accept or reject the document or request that it be resubmitted. If either reviewer rejects the document, or if the second reviewer accepts it, the process is considered complete.

Document submission without any approval
This is the simplest and most straightforward of the standard business processes. In it, the submitter sends a document to a reviewer, who reviews the document and then marks the task complete. No further communication with the submitter is required once the document has been sent to the reviewer.

Document submission for review
In this standard business process, a submitter sends a document to a reviewer, who can:

- Review the document
- Request that it be resubmitted

The reviewer can request that the document be resubmitted if more information is needed or can mark the process as done if the submitter has provided all the information that was needed. This process is similar to the request for documents business process, which is explained below.

Request for documents
This standard business process is initiated by a reviewer who requests a document from a submitter. The reviewer can request that the document be resubmitted if more information is needed or can mark the process as done if the submitter has provided all the information that was needed.

Rules-based processes

Group-triggered document distribution
This rules-based business process is similar to the rules-based document distribution process, but documents are automatically distributed to new and updated groups if they match the criteria in the rules you set. Once a group-triggered document distribution business process is created and configured, no additional human intervention is required to distribute the documents identified by the business process. After the documents have been distributed, other tasks, such as response acknowledgments and approvals, must be completed by users.

Rules-based document distribution
This highly configurable business process is used to distribute documents to groups. Using rules, exchange managers can identify both the documents and the groups that will be selected. Managers can require that users acknowledge receipt of the documents and that they complete documents associated with the process. Managers can auto-publish the attachments to users’ acknowledgments, again using rules that will determine which documents will be published, the location on your exchange where they will be published, the documents’
recipients, their permissions for using the documents, and the contents of email alerts sent to the recipients of newly published documents.

**Rules-based submission**
This business process is initiated by a reviewer who wishes to submit documents to the organization that is hosting the exchange. As with the rules-based document distribution business process, this process is highly configurable. Managers can determine who will view submitted documents, who will approve them, and whether they will be auto-published.

**Using standard and rules-based business processes**

**Viewing tasks that are assigned to you**

When tasks are assigned to you, an email alert containing a link to the task is sent to you. You also can view a list of tasks that are assigned to you, as well as those that you have assigned or submitted to other people, within Intralinks.

**Note:** If you use the **Tasks** list within an exchange, you will view only tasks that are associated with a multi-task process. Tasks associated with other business processes can be viewed only on the **Hub**.

The **Tasks** list displays current tasks that still need to be completed.

**To view all tasks that are assigned to you, or by you**

You should be viewing the **Hub**.

1. In the navigation pane on the left side of the screen, click the **Tasks** option. Additional options appear.
2. Click the **By Task Name** option. A list of tasks that are assigned to you and that you have assigned to others (if your exchange role allows this).
3. To view tasks assigned to you, click the **Open tasks assigned to me** option in the **Saved Searches** box that appears to the right of the navigation pane.

To view tasks that you have assigned to others, click the **Open tasks assigned by me** option in the **Saved Searches** box.

**Submitting documents**

Use the following procedure to create a standard business process instance and use it to submit documents to reviewers or approvers.

Note that you can create business process instances only for business processes to which you have been assigned. If you have not been identified as a submitter for any business processes, you will not be to perform this procedure.

**To submit a document**

You should be viewing the exchange where the document will be submitted.

1. Click the **Tasks** tab at the top of the screen.
2. From the **Actions** menu, select **New To Do or Submission**. The **Select Business Process** wizard appears.
3. Highlight the business process you want to use, and click Continue. The Instructions view of the wizard for your business process instance appears.

4. Review the instructions and any attached documents, then click Next. The Submission view of the wizard appears.

5. In the Process Instance field, enter a descriptive name for the task.

6. Enter other notes to explain the purpose of the submission.

7. Attach the document(s) that will be submitted. You can attach a document from the exchange or your computer or network. (If necessary, you can select documents from both the exchange and your computer or network.)

   To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.

   To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.

   To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.

8. You may be required to enter additional details, such as the type of document that you are submitting. If this is the case, a new screen with a number of additional fields appears. Make an entry in each field that applies to the document.

9. Click Save.

A task will appear in the Tasks list for the person who is supposed to receive your document, and an email alert will be sent to the person, alerting him or her that your document has been submitted.

Faxing in documents
Depending upon the way your exchange is set up, you may be able to fax document into the exchange for some business processes. In order to do this, you must print a cover sheet that will be used to direct your document to the correct exchange.

To create a fax-in cover sheet

You should be viewing the exchange where the document will be submitted.

The Tasks tab should be selected.

1. From the Actions menu, select Create a Fax Cover Sheet. The Select Business Process view of the Fax in Cover Sheet screen is displayed.

2. Highlight the business process that you want, and click Next. The Create Cover Sheet view is displayed.

   Note: If the business process that you want does not appear in the list, the exchange manager does not allow you to fax documents to it. You must submit your document online using the previous procedure.

3. Enter a title and note that will appear on the cover sheet.
4. Click Create Cover Sheet.

Fax the document, including the cover sheet, to the phone number that appears on the cover sheet. The documents and notes are uploaded to Intralinks, and the exchange manager is alerted.

Resubmitting documents
The managers of your exchange may have set up an approval process for document submissions. If your submission is reviewed and additional information is required, you may receive an email asking you to resubmit your documents with changes. A new task also will appear in the By Task Name view of your Tasks list. The process for resubmitting documents is very similar to the process that you used to submit the original documents.

To review a document that does not require approval
You should be viewing the exchange where the document will be submitted.

The Tasks tab should be selected.

1. In the Tasks list, highlight the task.

2. From the Actions menu, select View Details. The Submission Request view of the task wizard appears, displaying any notes and supporting documents that the reviewer or approver provided to explain the changes that you are required to make.

3. After you have reviewed the instructions, click Next. The Response view of the task wizard appears.

4. Enter any notes that you wish to include in the Submission Instructions field.

5. Attach the document(s) that will be submitted. You can attach a document from the exchange or your computer or network. (If necessary, you can select documents from both the exchange and your computer or network.)

   To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.

   To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.

   To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.

6. When you have selected all the documents that you wish to submit, click Save.

A task will appear in the approver’s Tasks list, and an email alert will be sent to the person, alerting him or her that your document has been resubmitted.
Reviewing and approving documents that have been submitted to you

Use the following steps to respond to a document submission. Depending upon the type of business process that the task is based upon, you may be able to approve or reject the submission, return it to the submitter and request a resubmission, or simply mark the task as done.

▶ To review a document

You should be viewing the Hub. If you have opened the task wizard using the link in the email alert that was sent to you, skip to step 6.

1. In the navigation pane on the left side of the screen, click the Tasks option. Additional options appear.
2. Click the By Task Name option. A list of tasks that are assigned to you and that you have assigned to others (if your exchange role allows this).
3. Click the Open tasks assigned to me option in the Saved Searches box that appears to the right of the navigation pane.
4. Locate the task that you want to view.
5. From the Actions menu, select View Details. The Submission view of the task wizard appears.
6. Read any notes provided by the person who submitted the document, then read the document. You can open documents by double-clicking them.
7. When you have finished viewing the document, return to the task wizard and click Next. The Response view of the wizard appears.
8. Review the instructions and reference documents, if any, that have been provided for you.
9. (Optional.) Enter a note. If the document is being returned to the submitter (you are asking for it to be resubmitted with changes, for example), use the note to provide the submitter with information about any changes that are needed.
10. (Optional.) You can attach a document from the exchange or your computer or network. (If necessary, you can select documents from both the exchange and your computer or network.)

To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.

To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.

To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.
11. From the Status field, select an action. The selections available to you vary depending upon the type of business process that was used to create this task.

- **Done** — The task will be marked as **Done** in the Tasks list, and no further steps are required. When you view it in the Tasks list in the future, only the history view will appear, showing the actions taken by you and the submitter.

- **Reviewed** — The task will be marked as **Reviewed** in the Tasks list, and no further steps are required. When you view it in the Tasks list in the future, only the history view will appear, showing the actions taken by you and the submitter.

- **Approve** — If the Document Submission with Approval business process was originally used to create this task, the task will be marked as **Approved** in the Tasks list, and no further steps are required.

  If the Document Submission with Two-Step Approval business process was used to create this task, the task will be marked as **Pending Approval 2** in the Tasks list, and it will be transferred to the second approver. When you view it in the Tasks list in the future, only the history view will appear, showing the actions taken by you and the submitter. (Note, however, that if the second reviewer rejects a document that you have approved, you will be asked to approve the resubmitted document.)

- **Reject** — The task will be marked as **Rejected** in the Tasks list, and no further steps are required. When you view it in the Tasks list in the future, only the history view will appear, showing the actions taken by you and the submitter.

- **Resubmit** — The task will be returned to the submitter’s Tasks list. Its status in the Tasks list is **Pending Resubmission** until the submitter responds.

12. Click **Save**.

**Requesting a document**

The process for requesting a document is very similar to the one used for submitting documents.

**To request a document**

You should be viewing the exchange where the document will be submitted.

The Tasks tab should be selected.

1. From the Actions menu, select **New To Do or Submission**. The Select Business Process wizard appears.

2. Highlight the business process you want to use, and click **Continue**. The Instructions view of the wizard for your business process instance appears.

3. Review the instructions and any attached documents, then click **Next**. The Select Submitters view of the wizard appears.

4. In the Process Instance field, enter a descriptive name for the task.
5. Enter other notes to explain the purpose of your request.

6. (Optional.) Attach document(s) that further explain your request. You can attach a document from the exchange or your computer or network. (If necessary, you can select documents from both the exchange and your computer or network.)

To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.

To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.

To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.

7. When you have selected all the documents that you wish to attach, click Add Rule. The Submission Rule 1 view of the task wizard appears.

8. Select the individuals who can provide the document that you need.

The people who can be document submitters have been defined for you.

You can select a combination of users and roles. If your exchange is set up to include collaboration groups, you can select these groups, as well. Choose Groups, Role Group, Users, or Group Metadata from the list that appears on the left side of the screen. Depending upon your selection, a list of users, roles, collaboration groups or custom fields appears.

Highlight the users, groups or roles that you want to assign to the process, and click the arrow button to move them to the list on the right. If you selected Group Metadata, select the attributes that match the groups that you want to select.

9. Repeat steps 7 and 8 to select additional document submitters.

10. Click Save.

A task will appear in the Tasks list for the person who is supposed to provide the document, and an email alert will be sent to the person, alerting him or her to your request.

**Responding to document requests**

Use the steps below if you are asked to provide a document.

**To respond to a document request**

You should be viewing the exchange where the document will be submitted.

The Tasks tab should be selected.

1. In the Tasks list, highlight the task.

2. From the Actions menu, select View Details. The Response view of the task wizard appears, displaying any notes and supporting documents that the
reviewer or approver provided to explain the changes that you are required to make.

3. After you have reviewed the instructions, enter any notes that you wish to include in the Submission Instructions field.

4. Attach the document(s) that will be submitted. You can attach a document from the exchange or your computer or network. (If necessary, you can select documents from both the exchange and your computer or network.)

To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.

To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.

To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.

5. When you have selected all the documents that you wish to submit, click Save.

A task will appear in the approver's Tasks list, and an email alert will be sent to the person, alerting him or her that you have provided the requested document.

Acknowledging receipt of documents

Exchange managers may, at their discretion, require that you acknowledge that you have received documents that have been distributed to you using a document distribution business process. You may be required to complete and submit a form with your acknowledgment. Additional instructions and other documents may be attached to this request. Review all the attached files, complete the documents (if any) using the instructions provided, along with the fields on the subsequent screens, and then submit your acknowledgment.

If the distributor of the original documents requires an acknowledgment by a specified date and you do not respond by that date, an email reminder will be sent to you and other members of your group.

To acknowledge receipt of a document that has been distributed to you

You should be viewing the Hub. If you have opened the task wizard using the link in the email alert that was sent to you, skip to step 6.

1. In the navigation pane on the left side of the screen, click the Tasks option. Additional options appear.
2. Click the By Task Name option. A list of tasks that are assigned to you and that you have assigned to others (if your exchange role allows this).
3. Click the Open tasks assigned to me option in the Standard Searches box that appears to the right of the navigation pane.
4. Locate the task that you want to view.
5. From the Actions menu, select View Details. The Instructions view of the task wizard appears, displaying instructions for acknowledging that you have received the documents. Additional files may be attached.

6. Review the instructions. To view attached files, double-click them.

7. When you have finished reviewing the instructions, click Next. The Response view is displayed.

8. (Optional.) Enter a note for your acknowledgment response.

9. Attach any document(s) (if any) that need to be submitted.
   To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.

   To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.

   To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.

10. If an eForm was attached, complete it and click the Submit Using Intralinks button on the form. (eForms are PDF documents that allow you enter information onscreen, just as you would with a paper-based form.)

11. (Optional.) When you have added all the documents that are needed for the response, highlight the first document beneath the Response tab on the left side of the screen.

12. (Optional.) A number of custom fields may appear on the screen. Make the appropriate selection or entry for each field.

13. (Optional.) Click Next Doc to display the fields for the next file that you attached, and make the appropriate selection or entry for each field.

   Repeat this step until you have made entries for all the files that are attached to this submission.

14. Click Save.

   Your acknowledgment response is uploaded to Intralinks, and the exchange manager is alerted.

   The exchange manager may have a response approval process; if this is the case, acknowledgment responses may be returned to you for clarification or additional information if needed. If this is the case, the task will be redisplayed in your Tasks list and will include instructions from the manager about the clarifications or other changes that are needed.

Resubmitting acknowledgment responses

The exchange manager may have set up an approval process for acknowledgment responses. If your response is reviewed and additional information is required, you may receive an email from the exchange manager (or other contact) asking you to resubmit your response with changes. The process
for resubmitting responses is very similar to the process that you used to make your original acknowledgment response.

**To respond to a request to resubmit information**

1. The email alert that you received requesting that documents be resubmitted includes a link to your exchange. Click this link to display the screen used for resubmission.
2. Review the message from the document approver. Make any required changes to your original documents.
3. Click Next. The Response view is displayed.
4. (Optional.) Enter a note about the resubmitted documents.
5. Attach the documents you updated and any additional documents requested by the document approver.
   
   To attach a document on the exchange, click the Attach Link button. A pane appears showing the folders on your exchange. Locate the document you want and highlight it, then click the Attach button that appears above the folder list. You can select as many documents as needed. When you have finished selecting documents, click the x button above the Attach button to close the selection pane.
   
   To attach a document on your computer or a network drive, click the Attach Document button. A Select file(s) to upload dialog box appears, allowing you to select the document you want.
   
   To select multiple items, press the SHIFT or CTRL key while clicking the items to highlight them.
6. (Optional.) When you have added all the documents that are needed for the resubmission, highlight the first document beneath the Response tab on the left side of the screen.
7. (Optional.) A number of custom fields may appear on the screen. Make the appropriate selection or entry for each field.
8. (Optional.) Click Next Doc to display the fields for the next file that you attached, and make the appropriate selection or entry for each field.
   
   Repeat this step until you have made entries for all the files that are attached to this submission.
9. (Optional.) You can view information about the original document, your acknowledgment response and any resubmissions that you have made by clicking the Submission History tab on the left side of the screen.
10. When you are ready to resubmit your response, click Save.

Your documents and/or notes are uploaded to Intralinks, and the exchange manager is alerted.

**Adding co-monitors**

Co-monitors are people who have been given permission to monitor your document submissions and to resubmit documents if required. Co-monitors are optional.
To add co-monitors to a business process instance

You should be viewing the exchange where the assignments were made.

1. Roll your mouse over the Tasks tab. Additional options appear.
2. Select By Process Name. A list of business processes with tasks that have been assigned to you, or that you have initiated, is displayed.
3. Highlight a business process instance that you want to be co-monitored.
4. From the Actions menu, select Add Co-monitor. The Select Co-monitors screen appears.
5. Select the individuals who will be co-monitors.
   The people who can be co-monitors have been defined for you.
   You can select a combination of users and roles. If your exchange is set up to include collaboration groups, you can select these groups, as well. Choose User, Role or Collaboration Groups from the list that appears on the left side of the screen. Depending upon your selection, a list of users, roles or collaboration groups appears.
   Highlight the users, groups or roles that you want to assign to the process and click the arrow button to move them to the list on the right.
6. Repeat step 5 until you have selected all the document reviewers or approvers.
7. Click Save.

Renaming a business process instance

To rename a business process instance

1. Roll your mouse over the Tasks tab. Additional options appear.
2. Select By Process Name. A list of business processes with tasks that have been assigned to you, or that you have initiated, is displayed.
3. Highlight a business process instance that you want to rename.
4. From the Actions menu, select Rename Task. The Rename Task window appears.
5. Enter the new name for the business process instance in the Enter new name field.
6. Click Rename.

Canceling a task

Depending upon the way your business process has been set up, you may be able to cancel a task that is not needed if no action has been taken on the task yet.

To cancel a task

1. Locate the task using the Tasks list and highlight it.
2. From the Actions menu, select Cancel task. A message appears asking you to confirm your selection.
3. Select Yes.

Using multi-task processes

As noted earlier, multi-task processes are collections of related tasks that must be completed to achieve a particular goal. Tasks are the individual, discrete actions that users must take while working to achieve the goal. For instance, you may have a separate task for reviewing each document that is associated with a process.

Use the procedures in this section to view processes and tasks, to complete tasks, and to add comments on tasks and processes.

Viewing processes and tasks

You can view the processes and tasks created by or assigned to using process lists and task lists that can be accessed from the **Hub** or from individual exchanges. In the **Hub**, the process lists and task lists displays both multi-task processes created within your exchanges and standard and rules-based business processes created and managed at the **Hub** level. If you view these lists within an exchange, only the processes and tasks created within the exchange are displayed.

- To view lists of processes and tasks

Display the **Hub**.

1. Click the **Tasks** tab.
   - The **By Process Name** option is selected automatically, displaying a list of processes that you have created or that include tasks that you are assigned to, either as a target group member or as an owner.

   For all processes, the process name and status is listed. Additional information is listed for multi-task processes, including the number of days since the process was initiated; the number of pending tasks awaiting your action; a calculation of the percentage of the process that has been completed; If you are viewing processes within an exchange you also can view the target group selected to perform tasks; the number of unread documents, the due date for completing the process, if any; and information about the last action taken for the process. If you are viewing multi-task processes on the **Hub**, the exchange and host organization associated with each process also is displayed.

2. To view only the tasks that are assigned to you, click the **By Task Name** option.

   When you double-click a multi-task process, all the tasks associated with it are displayed.

- To view the details of a process

Display the **Hub**.

1. Click the **Tasks** tab.
The **By Process Name** option is selected automatically, displaying a list of processes that you have created or that include tasks that you are assigned to, either as a target group member or as an owner.

2. Highlight the multi-task process that you want to view.
3. From the **Actions** menu, select **View Details**. All the tasks associated with the process are displayed, as are comments about the process.

### To export task information

1. Display the details of the process for which you want to export information. For information on displaying process details, see “To view the details of a process” on page 67.
2. From the **Actions** menu, select **Export List**. A message appears allowing you to open or save the list as a Microsoft Excel worksheet.

The exported list includes the name of each task and any documents that have been associated with it, the task’s status, and information about the last action that was taken on the task.

### Completing tasks

Use the steps below to take action when tasks are assigned to you. (Note that if you are a process owner, you also can take action on tasks that are assigned to others.)

### To complete tasks

1. Display the details of the process that contains the tasks that you want to complete. For information on displaying process details, see “To view the details of a process” on page 67.
2. Locate the task that you want to complete, and select an option for it from the list in the **Next Step** column. The next steps available depend upon the type of task you selected and the actions that have been performed on it already. Possible next steps include:

   **Download** — Select this option to download the document(s) attached to a task; the status of the task will be set to **Confirmed**, indicating that you have received the document.

   **Upload** — Select this command to update documents associated with a task before action has been taken on a task with one of the following task types: Distribute Document with Reply, Request Document, Request Document from Owner, and Request Review by Owner. This command appears only for tasks that have a status of Submitted or Pending Review.

   **Exclude** — Select this option if the task is complete or is no longer needed; it will no longer appear in the target group members’ **Tasks** lists. Excluded tasks can be reinstated; to reinstate an excluded task, select the action that appears in the **Next Step** column for it. (This is the first step that must be completed for the task.)

   **Confirm** — Select this option to indicate to task owners that you have received a document that has been distributed to you.

   **Accept** — After you have reviewed documents, select this option to indicate that the documents are ready to be published. If this task is for a document
that has been distributed for eSignatures, **Accept** can be used to return the task in its current state to the owner’s control even if the required number of signatures has not been obtained; all previous actions are undone, but a record of the actions is retained in the task’s history.

**Resubmit** — Select this option to send a request for resubmission to the target group associated with this task. If you need to provide additional direction to the target group, add a comment to the task. For information on adding comments, see “Adding comments to processes and tasks” on page 71.

**eSign** — Select this option to electronically sign the document that you have uploaded to a task. A box appears asking you to enter a reason for your signature. Enter your reason, then click **Continue**. Another box appears, asking you to enter your email address and Intralinks password. Once you have entered them, click **eSign Document**. Note that your eSignature is the equivalent of a handwritten signature and is legally binding.

**Refuse to eSign** — Select this option if you cannot electronically sign the document that you have uploaded to a task. A box appears asking you to select a reason for your signing of the document. Select your reason, then click **Continue**. Another box appears, asking you to enter your email address and Intralinks password. Once you have entered them, click **Refuse eSignature**.

**Restart** — Select this option to return an eSignature task to its original state. If this action is selected, all previous actions are undone, but a record of the actions is retained in the task’s history.

3. To view comments that have been entered for a task, click the bubble icon for that task in the **Comments** column. The number of comments that have been made appears in bubble icon. To add a comment, click the **Add Comment** link at the top of the screen.

4. To view a list of the actions that have been performed for this task, click the clock icon for the task in the **History** column.

**To upload documents without associating them with any task**

You can upload documents related to a process and associate them with tasks later. To upload files, complete the following steps:

1. Display the details of the process with which the documents will be associated. For information on displaying process details, see “To view the details of a process” on page 67.

2. Select the **Upload** link. The **Upload Documents** screen appears.

3. Click **Choose File**. A **Select file(s)** dialog box appears, allowing you to select the documents that you want to upload.

   To select multiple items, press the **SHIFT** or **CTRL** key while clicking the items to highlight them.

4. Click **Open**. The documents appear on the **Upload Documents** screen.

5. Click **Save**. The documents are uploaded, and line items appear for them in the task list.
To associate uploaded documents with particular tasks

If you have uploaded tasks for a process and have not associated them with any tasks, use the following steps to do so.

The task list that includes the documents should be displayed.

1. Display the details of the process that contains the documents and tasks that you want to associate. For information on displaying process details, see “To view the details of a process” on page 67.
2. Locate the document that you want to associate.
3. In the Next Step column, select Task Association. The first screen of the Task Association wizard appears.
4. Select the task with which this document should be associated.
5. Click Next. The Properties view of the wizard appears.
6. Review the properties that are displayed. You can change the document’s name if you like.
7. Click Next. The Details view of the wizard appears.
8. Enter details about the document. An entry must be made for fields that appear in red with an asterisk (*) next to them.
9. Click Save.

The document is removed from the task list and is associated with the task that you selected. The task’s status is updated, as well.

Faxing in documents

Depending upon the way your exchange is set up, you may be able to fax document into the exchange for processes. In order to do this, you must print a cover sheet that will be used to direct your document to the correct exchange.

Note: Do not use the same cover sheet for multiple documents unless you want the documents to have the same name on your exchange.

Once the document has been faxed in, it will be associated with the process, but it will not be associated with any particular task. To information on how to do this, see “To associate uploaded documents with particular tasks” on page 70.

To create a fax-in cover sheet

1. Display the details of the process with which the documents will be associated. For information on displaying process details, see “To view the details of a process” on page 67.
2. At the top of the screen (to the right of the Actions menu), locate the Fax Cover option and click it. The Choose Users view of the Create Fax Cover Sheet wizard appears.
3. In the list on the left side of the screen, highlight the user(s) who will fax in the document, and click the arrow button to move them to the list on the right.
4. Click Next. The Cover Sheet view of the wizard appears.
5. Enter the title of the document. You also can enter notes about the document if you like; these notes will appear on the document’s properties screen in the exchange.

6. Click **Save**. The cover sheet is created in PDF format, and a message appears asking you whether you want to open the cover sheet or save it. Either open the cover sheet and print it or save it and print it later.

Fax the document, including the cover sheet, to the phone number that appears on the cover sheet. The documents and notes are uploaded to Intralinks, and the exchange manager is alerted.

Adding comments to processes and tasks

You can add comments to multi-task processes when you complete tasks that are assigned to you. You can add comments both to individual tasks in task lists and the overall process. Process comments are not associated with any particular task.

▶ **To add a comment to a task**

1. Display the details of the process that contains the task for which you want to add a comment. For information on displaying process details, see “To view the details of a process” on page 67.

2. Highlight the task.

3. From the **Actions** menu, select **Add Comment**. The **Add Comment** screen appears.

4. Enter your comment in the text box. Note that the following characters cannot be used in comments:

   / \ : * " < > ? |

5. If you want to apply the comment to a task other than the one that is selected, select the task you want from the **For Specific Task** list.

6. Click **Save**.

▶ **To add a comment that is not associated with any task**

1. Display the details of the process for which you want to add a comment. For information on displaying process details, see “To view the details of a process” on page 67.

2. From the **Actions** menu, select **Add Comment**. The **Add Comment** screen appears.

3. Enter your comment in the text box. Note that the following characters cannot be used in comments:

   / \ : * " < > ? |

4. If you want to apply the comment to a task other than the one that is selected, select the task you want from the **For Specific Task** list.

5. Click **Save**.

Your comment will appear in the **Process Comments** section of the task list for this process.
To view comments that have been entered for a task

1. Display the details for the process containing the comments that you want to view. For information on displaying process details, see “To view the details of a process” on page 67.

2. Highlight the task that has been commented upon.

3. From the Actions menu, select Comments. The Comments screen appears, displaying the comments for the selected task.

4. The first 50 characters of each comment is displayed; you can view the entire comment if you like. To view additional text, click the More>> link next to the comment. When you have finished viewing the extended text, click Back to All Comments to view all the comments entered for the task.

5. When you have finished viewing comments, click Close.

To view all comments that have been entered for a process and its tasks

1. Display the details for the process containing the comments that you want to view. For information on displaying process details, see “To view the details of a process” on page 67.

2. Click the See All Comments link that appears in Process Comments section of the screen. The Comments screen appears, displaying all the comments entered for the process and the tasks associated with it.

3. The first 50 characters of each comment is displayed; you can view the entire comment if you like. To view additional text, click the More>> link next to the comment. When you have finished viewing the extended text, click Back to All Comments to view all the comments entered for the task or process.

4. When you have finished viewing comments, click Close.

Changing the status of processes

You can change the status of individual processes as they are completed or no longer needed. It is important that processes’ status is correct, since this information is used to determine the number of open tasks, percentage of completion and other statistics used to monitor and manage processes.

Important! When processes are completed, their statuses should be changed to Closed, to ensure accurate reporting.

You can perform this task only if you are a process owner.

To change the status of a process

1. Display the details for the process whose status you want to change.

   For information on displaying process details, see “To view the details of a process” on page 67.

2. From the Status list in the upper right corner of the screen, select one of the following options:

   Open — This status is displayed by default for processes that are in progress. Select this option if you have selected another status and now wish to begin using the process again.
Closed — Select this option when a process is completed or you do not wish to continue using it for another reason. If any tasks associated with the process are open, their status will be changed to Excluded. Closed processes can be viewed by process owners, but the processes cannot be changed in any way. Closed processes can be reopened if necessary.

Suspended — Select this option when you do not want to include a process in tallies of open tasks and unread comments, but you are not ready to close the process. The status of tasks that are underway are not changed when processes are suspended, and target group members and owners can continue to make changes to the tasks and add comments. Suspended processes can be reopened.

Deleted — Select this option if you wish to stop using the process and hide its tasks from target group members. The status of individual tasks that are in progress will not be changed. Owners will be able to view tasks, but cannot take action on them. Deleted processes can be reopened if necessary.

3. An informational screen may appear informing you of the changes that will be made to the process. Review the information on the screen, then click Continue.
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