Intralinks Workflow Configuration Guide
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Chapter 1: Welcome

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

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

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

Guides for M&A Managers and Publishers

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

Guides for M&A Reviewers

• Intralinks User Guide for M&A Reviewers

Q&A Guides

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

System requirements

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

• **Windows and Macintosh operating systems:** No specific requirement, but must be able to support a supported Web browser

  **Note:** Windows PCs must have a 32-bit processor and a minimum of 512 MB of RAM, 10 MB of available disk space and a 1 GHz CPU (central processing unit)

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

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

Getting answers online

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

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

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

http://www.intralinks.com/contact/client-services
Chapter 2: Configuring workflows

Overview

In this chapter you will learn how to:

• Create, configure and activate workflows
• Make changes to existing workflows
• Inactivate and reactivate workflows

What are workflows?

*Workflows* are predefined interactions that are designed to control the flow of documents and ensure that they are handled in a consistent way.

Users with the Manager Plus exchange role can configure a one-step approval workflow for documents stored in their exchanges. The managers can define both the people who are allowed to request document reviews (*requestors*) and those who can approve the documents (*approvers*). Managers also can choose to automatically publish documents after they are approved; documents can be published in their current location or in another folder specified by the manager.

Once a workflow is configured, the people who were selected as requestors can use the workflow to send documents for review. The people selected as approvers then can either approve or reject the documents, as well as add comments.

Enabling workflows

If Intralinks’ workflow feature is not enabled on your exchange, contact your Intralinks Customer Service Manager for assistance. This feature must be enabled by an Intralinks employee.

▶ To determine whether workflows are available on your exchange

1. Click ☰ Settings in the upper right corner of the screen, then select Exchange Settings.
2. In the Advanced Settings section on the left side of the screen, select Workflow. If the Workflow setting is currently OFF, contact your Intralinks Client Services representative and request that the setting be turned ON.

   If the Workflow setting is ON, you are ready to begin configuring workflows.

Configuring workflows

Use the steps below to set up workflows for one-step document approval. Each configuration should serve a single purpose. For example, you could create a configuration to route documents to your organization’s legal team, and another workflow to route documents to the finance team. You can set up as many configuration as your organization needs.
To create a new workflow configuration

1. Click **Settings** in the upper right corner of the screen, then select **Exchange Settings** from the menu that appears.

2. In the **Advanced Settings** section on the left side of the screen, select **Workflow**.
   
   (If the **Workflow** setting is currently OFF, contact your Intralinks Client Services representative and request that the setting be turned ON.)

3. Click **Configure** to display the **Workflow Configuration** panel. If you or other managers have created workflow configurations, they are displayed.

4. Click **Create Configuration**. The **Workflow Configuration > Request Approval** panel appears.

5. In the **Request Type** field, enter a name for the configuration. This is the name that the people requesting approval and the approvers will see. Be sure the name clearly describes the configuration’s purpose and is easy to distinguish from other configuration names.

6. In the **Requestors** field, enter or select the groups that will be allowed to use this workflow to request document approval. This configuration will be available only to the groups you select.

7. In the flowchart, locate the **Approve Document** step and click the **Configure** link. An **Assign to** field appears.

8. In the **Assign to** field, enter or select the people who will be allowed to approve or reject documents that are routed to them using this workflow.

9. (Optional.) If you want documents to be automatically published after they are approved, select the **Publish Document** option. (Documents that are rejected will not be published.)

   a. A panel will slide out, allowing you to select the folder where documents that are approved using this workflow will be published. Select the folder you want, or select the option to leave documents where they are. Then click **Next**.

   b. Review the permissions for each group on the exchange. These permissions will determine whether the groups can view or change the documents published using this workflow.

   **If your exchange uses folder-level permissioning** If you wish to make changes to the permissions already applied to this folder, select the **Set permissions now** option. To change an individual group’s permissions, right-click on the group’s name and select a permissioning option from the menu that appears. To change permissions for all groups, mark the box next to the **Group Name** heading, then right-click on the groups and select the permissioning option you want.

   **If your exchange uses document-level permissioning** To change an individual group’s permissions, right-click on the group’s name and select a permissioning option from the menu that appears. To change permissions for all groups, mark the box next to the **Group Name** heading, then right-click on the groups and select the permissioning option you want.

   c. When documents are published, users who have access to them will be notified by email. Intralinks provides a standard subject line for these
emails, but you can enter a different subject line if you like. You also can add a note to each email message if you like; the same note will appear for every document published using this workflow.

d. When you are satisfied with your entries, click Done.

10. If the configuration is complete and you want to make it available to the requestors you selected in step 6, click Activate. The Workflow Configuration panel is redisplayed, and your configuration is displayed with an Active status.

If you want to save your changes but leave the configuration inactive for now, click Save Changes. Return to this screen and activate the configuration when you are ready for requestors to begin using it.

► To change an existing workflow configuration

If you change a configuration, only new workflow instances will reflect your changes. You can rename the configuration and add or remove groups of requestors and approvers.

Any approval processes that are already underway will be unaffected by your changes.

1. Click Settings in the upper right corner of the screen, then select Exchange Settings from the menu that appears.
2. In the Advanced Settings section on the left side of the screen, select Workflow.
3. Click Configure to display the Workflow Configuration panel.
4. Click on the configuration you want to change. The Workflow Configuration > Request Approval panel appears.
5. Make the needed changes.
6. Click Save Changes.
7. A message appears advising you that the changes will not affect existing document approvals. Click Save to continue.

Inactivating and reactivating workflow configurations

Once a workflow configuration is activated, you can inactivate it, but you cannot delete it. Approvers will be able to approve or reject any documents that were routed to them, but requestors will not be able to use this configuration to route any additional documents unless you reactivate the configuration.

► To deactivate a workflow configuration

You can deactivate a configuration that is no longer needed. The configuration will be marked as Inactive but can be reactivated if it is needed again in the future.

1. Click Settings in the upper right corner of the screen, then select Exchange Settings from the menu that appears.
2. In the Advanced Settings section on the left side of the screen, select Workflow.
3. Click Configure to display the Workflow Configuration panel.
4. Click on the configuration you want to deactivate. The Workflow Configuration > Request Approval panel appears.

5. Click Deactivate. The Workflow Configuration panel is redisplayed, and your configuration is displayed with an Inactive status. The configuration is inactivated. The requestors who are assigned to the configuration can no longer create new workflow instances using this configuration, but approvers can finish any document approvals that are already underway.

▶ To reactivate a workflow configuration

1. Click Settings in the upper right corner of the screen, then select Exchange Settings from the menu that appears.

2. In the Advanced Settings section on the left side of the screen, select Workflow.

3. Click Configure to display the Workflow Configuration panel.

4. Click on the configuration you want to reactivate. The Workflow Configuration > Request Approval panel appears.

5. Click Activate. The Workflow Configuration panel is redisplayed, and your configuration is displayed with an Active status.

Deleting workflow configurations that are no longer needed

You can delete any active or inactive workflow configuration, as long as no documents are being approved using the configuration. If you are unable to delete a configuration, you may want to inactivate it to ensure that it is not used to send any additional documents for approval. Once all documents have been approved or rejected, the configuration can be deleted.

▶ To delete a workflow configuration

1. Click Settings in the upper right corner of the screen, then select Exchange Settings from the menu that appears.

2. In the Advanced Settings section on the left side of the screen, select Workflow.

3. Click Configure to display the Workflow Configuration panel.

4. Click the trash can icon that appears to the right of the configuration you want to delete. A message appears, asking you to confirm your selection. Click Remove.
Chapter 3: Requesting document approvals and reviewing documents

Overview

In this chapter you will learn about:

• Requesting approval for a document
• Finding approval requests quickly
• Approving and rejecting documents

Requesting approval for a document

Note: Exchange managers are responsible for deciding whether this feature will be available in their exchanges. If you do not see the Request Approval command described below, document approval is not available in your exchange.

▷ To request approval for a document

You should be viewing the Documents list.

1. Highlight the document that you want to be approved.
2. Select Request Approval from the Action menu. The Request Approval panel appears.
3. In the Request Type field, select the type of request you are making. Your selection will be used to route the document to the correct approvers.
4. (Optional.) Change the name of the request. If you make a change, be sure the new name will make it easy for the approvers to understand the nature of your request.
5. (Optional.) Add comments to provide any information you think will be needed by the approvers.
6. Click Send Request. The Documents list reappears, and the document now has a status of Pending Approval. All members of the group responsible for reviewing your document will receive an email to alert that the document needs to be reviewed.

You can monitor the Status column in the Documents list for updates. When the document is approved or rejected, you will be notified by email, as well.

You, members of the group responsible for approving the document, and exchange managers all can view your document request. Other people who have access to the document can see the document’s approval status, but they cannot see other details about your request.

▷ To review the status or history of a document approval request

As noted above, you can use the Status column in the Documents list to view the current status of your requests. For more detailed information, complete the steps below.
1. In the Documents list, locate the document and click on its status in the Status column. The Approval Activity History screen appears, showing details about the approval process, including the person who requested the approval, the groups that may act as approvers, and any comments added by the requestor or approvers.

2. (Optional.) Click the Export button to create a report in Microsoft Excel format containing the information displayed on the screen. Note that if the document was previously submitted for approval, information about that approval process is not included.

3. When you have finished, click Cancel to return to the Documents list.

Finding approval requests quickly

You can use the steps below to find the documents you have submitted for approval or that have been assigned to you for review.

► To find approval requests quickly

1. Display the Documents screen, then click the search filter icon 🌪. The filters panel appears.

2. Select the Approval Requests option.

3. Click Apply. The documents list displays all the documents you have submitted for approval, as well as those you have been asked to review.

Approving and rejecting documents

Use the steps below to approve or reject the documents that are routed to you.

► To review a document

1. In the Documents list, locate the document, and click on the Pending Approval link in the Status column. The document appears with an Approval Details panel displayed to the right of the document.

2. (Optional.) Add a comment to explain why you are approving or rejecting the document.

3. Click Approve or Reject. The Documents list reappears, and the document now has a status of Approved or Rejected. An email notification will be sent to let the person who submitted the document know that you have completed the review. Depending upon how your exchange is set up, the document (if approved) may be published, and everyone who has access to the document will be alerted by email, as well.