Intralinks Connector for SharePoint®

Version 4.4.2

User Guide

Table of Contents

Chapter 1: Introduction

The Intralinks Connector for SharePoint$^{®}$ enables you to synchronize the folders and files in your SharePoint library with a mapped set of folders and files on an Intralinks exchange.

The Intralinks Connector will automatically upload and download documents from Intralinks. This allows you to "pull" information posted to Intralinks into SharePoint for internal distribution and to "push" information to the Intralinks exchange using SharePoint. In addition, the Intralinks Connector allows you to manage Intralinks users and groups and permissions for Intralinks documents and folders from within SharePoint.

Note: The Intralinks Connector supports the linking of a single SharePoint site to a single Intralinks exchange. You can create a new site for this purpose, or use an existing site.

Purpose of this document

The *Intralinks Connector for SharePoint User Guide* provides step-by-step procedures for performing Intralinks exchange-related tasks from within your SharePoint library. This guide assumes a basic familiarity with standard SharePoint procedures such as adding folders, deleting documents, and adding users and groups.

The guide also assumes a basic familiarity with Intralinks terminology. A comparison of related SharePoint and Intralinks terminology is provided below. For other Intralinks related questions, consult your Intralinks customer support representative.

SharePoint and Intralinks terminology compared

SharePoint	Intralinks
SharePoint library/site	Exchange
Folder – Folder title	Folder – Folder title
Document	Document
User roles[1] – Site owner – Contributor – Reader – Custom defined – Custom group	User roles[1] – Manager Plus – Reviewer – Publisher – Manager – Group
Property name	Custom field name
Built-in item-level auditing	Access logs Audit logs
Permissions[2] – Limited access – Read – Contribute – Design – Full control	Permissions[2] **Editorial options** – None – See – Control **Locking and Protection options** – None – Protect – Protect/No Print
Permissions object – Document – Document Folder – SharePoint library – Site	Permissions object – Document

[1]   Both SharePoint permissions and Intralinks exchange user roles can be applied using SharePoint. These roles operate independently and will not affect each other. Note that individual Intralinks exchanges may not have all of the roles displayed here or may have additional roles that do not appear here. For more information about exchange roles, see the *Intralinks Platform User Guide for Managers and Publishers.*

[2]   Both SharePoint permissions and Intralinks exchange permissions can be applied using SharePoint. These permissions operate independently and will not affect each other.

Audience for this document

The *Intralinks Connector for SharePoint User Guide* is intended for:

- The **SharePoint site administrator** who uses SharePoint to work with a mapped Intralinks exchange. This person may or may not be an Intralinks exchange user.

- The **Intralinks Connector for SharePoint administrator** who is responsible for monitoring use of the Intralinks Connector.

Setting up and connecting the Intralinks Connector for SharePoint

The **SharePoint administrator** is responsible for part of the installation process and for configuring the Intralinks Connector. These procedures are covered in the *Intralinks Connector for SharePoint Installation and Configuration Guide*.

How the Intralinks Connector for SharePoint works

The Intralinks Connector for SharePoint is designed to:

- Work with new or existing SharePoint sites

- Connect a selected SharePoint library with a folder on an Intralinks exchange, or connect multiple SharePoint libraries with multiple top-level folders on the Intralinks exchange.

- Synchronize documents between the SharePoint libraries and Intralinks exchanges.

- Allow you to set the synchronization interval for each SharePoint site you have connected to an Intralinks exchange.

  – The SharePoint administrator also has the ability to manually trigger a full or incremental synchronization between your SharePoint library and Intralinks exchange at any time.

    When you perform a full sync, all contents will be synced regardless of the date and time on which they were added and changed. If you perform an incremental sync, you can choose to sync only the files that have been changed since the last time a sync was performed, or you can select a point of time within the past 7 days and sync all the files that were changed during that time frame. All of the items that meet the criteria that you specified will be synced.

Chapter 2: Configuring the Intralinks Connector for SharePoint

Important! This chapter is intended for **Intralinks Connector administrators**. If you are a site administrator and do no have Intralinks Connector administrator privileges, please skip this chapter and go on to **Chapter 4,** *Using the Intralinks Connector for SharePoint*, on page 15.

Displaying the Intralinks Connector administrator portal

You can display the Intralinks Connector administrator portal using the URL that you specified when you installed the Intralinks Connector for SharePoint. If another member of your organization's IT team installed the Intralinks Connector, contact that person for the URL.

Note: People who will act as Intralinks Connector administrators must be a member of the Active Directory group specified in the AD_GROUP_NAME setting on the **Site Configuration Settings** screen. The default group name is **Spin_Adm**. You can select another group if you like.

Configuring the Intralinks Connector

For a complete list of configuration settings, their default values, and a description of each setting, see **Appendix B,** *Site configuration settings*, on page 68.

▶ **To view and update configuration settings for the Intralinks Connector**

The Intralinks Connector administrator portal should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying a number of options.

2. Select **Site Configuration Settings**. A list of configuration settings appears, along with their values and a description of each setting.

4. To change a configuration setting, click the pencil icon ✐ that appears in the **Actions** column next to the setting. The entry in the **Value** column becomes editable, and the pencil icon is replaced by **Save** and **Cancel** commands.

5. Make your change and click **Save**.

Updating settings for email alerts

Email alerts can be sent to notify you when site synchronization is successful or fails.

For each site, you (or the person you designate in the procedure below) will receive an email alert every time a sync task is completed successfully.

If a sync fails, you will receive an email alert with information about the cause of the failure. (For example, custom field values were not specified for documents being synced to Intralinks.) If a sync task is not fixed after three sync cycles, you will no longer receive failure alerts for that mapped library until there is a successful sync. Once the problem is fixed and syncing resumes successfully, you will begin receiving success alerts again.

▶ **To update email alert settings**

The Intralinks Connector for SharePoint should be displayed.

1. Click the bell icon in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Click on **Sync Success**. Additional fields appear.

3. Review the suggested text in the **Subject Line** field. This text will appear in the subject line for the email messages sent to alert you when a sync task was completed successfully. You can change this text if you like.

4. Click **Save** to save your changes.

5. In the **Recipients** field, enter your email address. If you want other people to be notified when these reports are ready, enter the people's email addresses. Separate each address with a semicolon (;).

6. Click on **Sync Failure**. Additional fields appear.

7. Review the suggested text in the **Subject Line** field. This text will appear in the subject line for the email messages sent to alert you when a sync task could not be completed. You can change this text if you like.

8. In the **Recipients** field, enter your email address. If you want other people to be notified when your password is about to expire, enter the people's email addresses. Separate each address with a semicolon (;).

9. Click **Save** to save your changes.

Modifying server nicknames in configuration files

You can modify the configuration files for each server to include nicknames that will make it easier for you to identify the servers. These nicknames will appear in the Intralinks Connector dashboard.

▶ **To modify a server nickname**

1. Locate the IntralinksConnector.config file and open it. This file typically is found at **Installer/ConnectorComponents/Config**.

2. Change the value of **ServerID** to the nickname that will be used for the server. For example:

```
<add key="ServerId" value="WEB-Server1" />
```


Figure 3: The Intralinks Connector Dashboard screen with server nicknames.

Configuring proxy settings

If your organization uses a proxy to provide Internet access, you must enter proxy settings for the Intralinks Connector.

▶ **To configure proxy settings**

The Intralinks Connector administrator portal should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying a number of options.

2. Select **Proxy Settings**. The **Proxy Settings** screen appears.
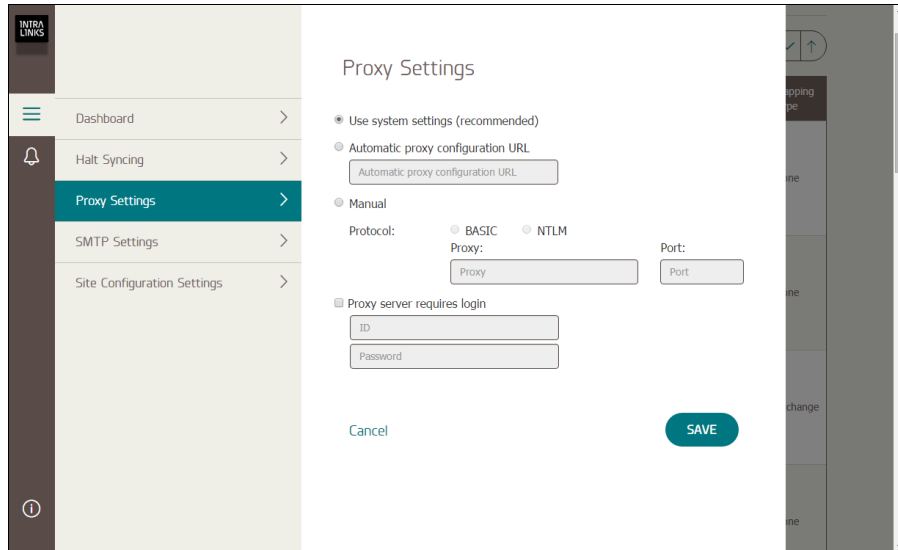
Figure 3: The Proxy Settings screen.

4. Mark one of the following options:

    - **Use system settings (recommended)** — The Intralinks Connector will detect and use the proxy settings specified in your computer's system settings. No additional entries are required.

    - **Automatic proxy configuration URL** — Mark this option if you use a Proxy Automatic Configuration (PAC) file and specify the address for the PAC file (for example, `http://proxy.intralinks.com/ pacfile.pac`). No additional entries are required.

    - **Manual** — If you connect to the proxy manually, provide the following information:

        – Authentication type — BASIC or NTLM

        – The IP address for the proxy, (for example, `192.192.192.192`)

        – The port used for the proxy (for example, `8080`)

        – The proxy ID and password (if the proxy is authenticated)

5. If the proxy server requires login credentials, mark the **Proxy server requires login** option and enter an ID and password for the proxy.

6. Click **Save**.

Providing SMTP settings

To ensure that email alerts are sent to Intralinks Connector administrators and site administrators, you must enter SMTP (Simple Mail Transfer Protocol) information for your organization's email system.

▶ **To enter SMTP settings**

The Intralinks Connector administrator portal should be displayed.

1. Click the navigation icon ☰ in the menu bar on the left side of the screen. A panel slides out, displaying a number of options.

2. Select **SMTP Settings**. The **SMTP Settings** screen appears.

3. Enter the name of your mail server, user name, password, and the number of days that users accounts accessing the Intralinks Platform through the Intralinks Connector may use a password before it must be reset.

4. Click **Save**.

Chapter 3: Managing the Intralinks Connector for SharePoint

Important! This chapter is intended for **Intralinks Connector administrators**. If you are a site owner and do no have Intralinks Connector administrator privileges, please skip this chapter and go on to **Chapter 4,** *Using the Intralinks Connector for SharePoint*, on page 15.

People who will act as Intralinks Connector administrators must be a member of the Active Directory group specified in the AD_GROUP_NAME setting on the **Site Configuration Settings** screen. For information about managing site configuration settings, see Chapter 2, *Configuring the Intralinks Connector for SharePoint*, on page 7.

Using the Intralinks Connector administrator dashboard

The Intralinks Connector administrator provides a quick and comprehensive view of all the sites you are managing.

The Intralinks Connector Dashboard screen.

The **Site Information** column includes the name of the SharePoint site and the Intralinks exchange that are mapped to one another, along with the email address of the site administrator and mapping type. Click the downward-pointing arrow to display mapping information for individual libraries, including the Intralinks folders they are mapped to, and the syncing method selected for the library and folder (Intralinks to SharePoint, SharePoint to Intralinks, or 2 Way). Click the arrow again to hide the library details. Click the site's name to display the **Site Synchronization Settings** screen used by the site owner to set up syncing for this site. Using that screen, you can view the Sync Logs for the site or initiate a manual sync of the site.

The **Site Collection** column identifies the collection that each listed site belongs to. Click on a site collection name to see only the sites associated with that collection.

The **Last Sync Information** column shows the result, date and time of the most recent sync type, along with the amount of time needed to complete the sync. If no information appears, the site has not been synced for the first time yet.

The **Result** column shows whether the most recent sync succeeded or failed. If no information appears, the site has not been synced for the first time yet. If a sync has failed, you can hover the mouse over the **Failed** entry to learn more about why the sync failed.

The **Sync Interval** column shows the frequency with which the site is scheduled to be synced.

The **Status/Queue Order** column shows the site's current sync status. One of the following statuses will be displayed:

- **Authenticated** — The site administrator has connected the site by providing credentials, but has not scheduled a sync yet.

- **Syncing** — The site is being synced.

- **Idle** — The site is between sync sessions. No syncing activity is underway.

- **Queued** — The site is ready for syncing, but waiting for other sites to finish syncing. This status is followed by a number that indicates the sync task's position in the queue. For example, if *Queued (1)* is displayed, the task is next in line to be synced.

- **Disconnected** — The site administrator has disconnected the site.

- **Invalid Token** — The connected Intralinks user token has become corrupted. To resolve this issue, disconnect the site and reconnect again.

The **Server/Process ID** column shows the name of the server hosting the site.

Troubleshooting sync errors

When a problem prevents a library from being synced, an email alert will be sent to the email address (or addresses) that you specified during configuration. From there you can display the Intralinks Connector dashboard to learn more about the problem. The word **Failed** appears in the **Result** column for each site that has failed syncing. Hover the mouse pointer over the **Failed** entry to learn more about why the sync failed.

For more detailed information, you can request a Sync Log from the site administrator for the site that is failing to sync. The Sync Log will contain an error ID that can be cross-referenced against backend system logs to pinpoint relevant information about the problem.

To learn more about configuring email alerts, see "Updating settings for email alerts" on page 8.

Halting the Intralinks Connector for all sites

You can use the **Halt Syncing** screen to stop syncing for all sites across the organization. You may want to do this if you need to install an upgrade to the Intralinks Connector or perform maintenance on SharePoint.
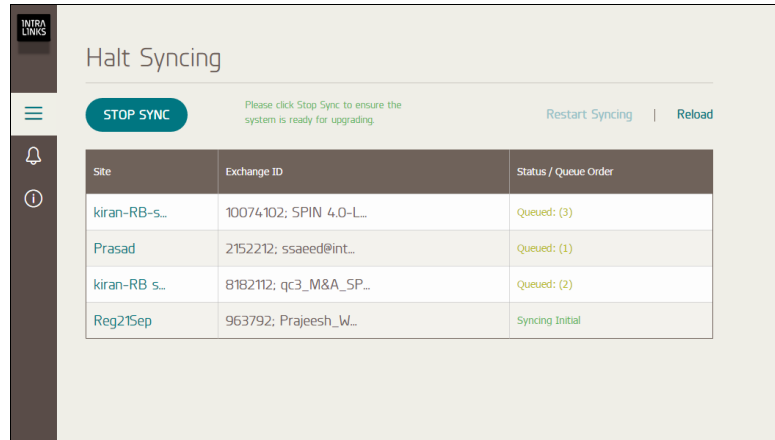
The Halt Syncing screen.

▶ To halt syncing for all sites

The Intralinks Connector administrator portal should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying a number of options.

2. Select **Halt Syncing**. The **Halt Syncing** screen appears.

3. Click the **Stop Sync** button.

4. A message appears asking you to confirm your selection. Click **Confirm**.

Syncing will be halted for all sites, and the sites will be removed from the screen. When you are ready to begin syncing again, return to the **Halt Syncing** screen and click the **Restart Syncing** link. Click **Reload** to refresh the screen and redisplay the sites that are being synced.

Chapter 4: Using the Intralinks Connector for SharePoint

Overview

This chapter provides step-by-step instructions for using the Intralinks Connector for SharePoint. This chapter is intended for SharePoint site administrators who wish to sync their site libraries with Intralinks exchanges.

Using the Intralinks Connector, you can complete the following tasks:

Connecting your SharePoint site to an Intralinks exchange

- **Connecting your SharePoint site to an Intralinks exchange**
- **Updating settings for email alerts**
- **Making changes to your sync settings**
- **Working with folders and documents**

Managing the syncing process

- **Viewing the sync status for a linked library and Intralinks exchange**
- **Manually synchronizing SharePoint and Intralinks**
- **Viewing connectivity status, version information, and downloading documentation**
- **Viewing the Reconciliation Report**
- **Accessing your SharePoint site from the Intralinks Connector**
- **Disconnecting from your Intralinks exchange**
- **Deregistering from your Intralinks exchange**

Working with folders and documents

- **Understanding Intralinks IRM protections in SharePoint**
- **Working with documents and folders in SharePoint**
- **Moving mapped documents within SharePoint**
- **Marking a folder as offline**
- **Preventing folders from being uploaded**
- **Checking documents in and out**
- **Viewing document access information**
- **Entering values for document custom fields**
- **Editing custom field values**

Working with permissions

- **Viewing and setting permissions for folders in Intralinks**
- **Viewing and setting permissions for individual documents in Intralinks**
- **Working with groups**

Working with groups

- **Adding a group to your Intralinks exchange**
- **Viewing the members of an Intralinks group**
- **Adding or removing people from Intralinks groups**
- **Deleting Intralinks groups**
- **Viewing and editing group custom fields**

Working with users

- **Adding a user to your Intralinks exchange**
- **Changing a user's role in your Intralinks exchange**
- **Removing users from Intralinks exchanges**

Getting started with Intralinks Connector for SharePoint

Important! Intralinks recommends that you create an Intralinks account for use with the Intralinks Connector. Do not use a personal Intralinks account with the Intralinks Connector.

You can log into the Intralinks Connector using the name and password associated with the Intralinks Connector account. Intralinks supports a shared user account that can be used to connect multiple SharePoint sites with Intralinks exchanges. When you use a shared account to connect multiple sites and exchanges, you will be asked to provide a password only for the first connection. For all additional connections, the password will be supplied automatically.

Accounts used to log into the Intralinks Connector must be assigned the Manager Plus exchange role in the Intralinks exchanges that will be linked to your SharePoint sites.

Important! Concurrent login capability must be enabled on the Intralinks Platform for both individual and shared user accounts.

When your Intralinks Connector account is added to the exchange, the Connector must be assigned a Manager Plus role in Intralinks. Exchange roles determine what actions the Connector can perform on the Intralinks exchange.

Adding the Intralinks Connector app to your SharePoint site

Before you begin working with the Intralinks Connector for SharePoint, you must install the Intralinks Connector app on your SharePoint site.

Note: You must have full control rights for your site in order to install apps. If you are unable to install the Intralinks Connector app, contact your SharePoint administrator.

▶ **To add the Intralinks Connector app to your site**

Your SharePoint site should be displayed.

1. In the navigation panel on the left side of the screen, click **Site Contents**. The **Site Contents** view appears.

2. Click the **add an app** icon. The **Your Apps** view appears.

3. In the navigation panel on the left side of the screen, click **From Your Organization**. A list of apps appears.
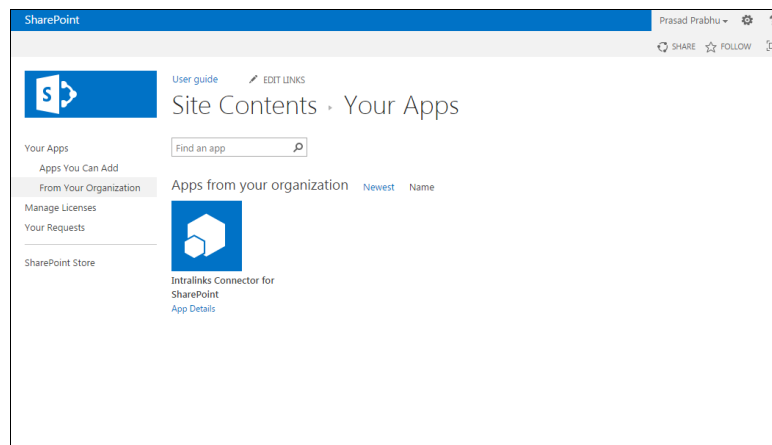
The Your Apps screen, displaying organization-specific apps.

4. Locate the Intralinks icon, and click the **App Details** link below it.

5. A description of the app appears. Click the **Add It** button to add the Intralinks Connector app.

Connecting your SharePoint site to an Intralinks exchange

▶ **To connect a SharePoint site to an Intralinks exchange for the first time**

1. In SharePoint, display your home page and click on the tab for the site you want to link to an Intralinks exchange.

2. In the menu on the left side of the screen, click, **Site Contents**. The **Site Contents** screen appears.

3. Click the icon for Intralinks Connector for SharePoint. The **Site Synchronization Settings** screen appears, displaying a message that no sync activities have been set up.
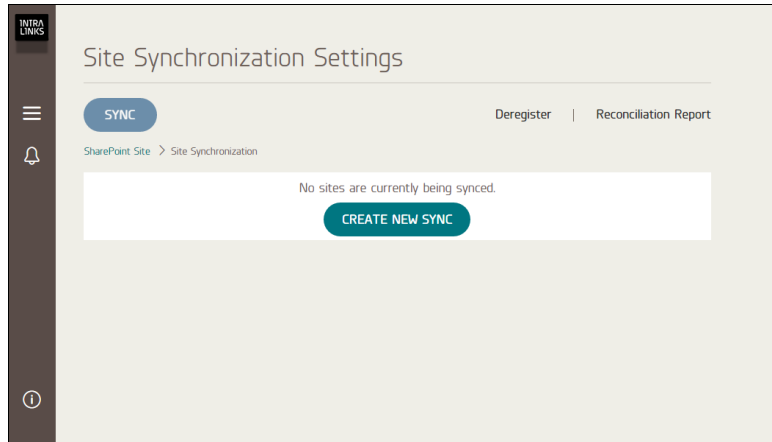
The Site Synchronization Settings screen, before sites have been connected.

Note the **SharePoint Site** link below the **Sync** button; you can click this link to return to SharePoint if necessary.

4. Click **Create New Sync**. The **Sync Settings** screen appears.
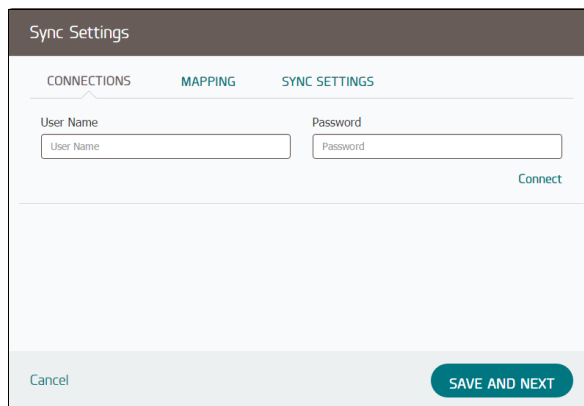
The Connections view of the Sync Settings screen.

5. Enter the email address and password for the Intralinks account that was created for you to use with the Intralinks Connector, then click **Connect**. An additional field appears on the screen.

6. In the new field, select the Intralinks exchange that will be linked to your SharePoint site. Only exchanges for which you have been assigned the Manager Plus exchange role appear in the list.

    Note that exchanges that require two-factor authentication (2FA) cannot be selected here. If you select an exchange that requires 2FA, a message will appear asking you to select another exchange. If you have an exchange that requires 2FA and it needs to be connected to SharePoint, please contact Intralinks support for assistance.

7. Click **Save and Next**. The **Mapping** tab of the **Sync Settings** screen appears.

The Mapping view of the Sync Settings screen.

8. If you want to map multiple SharePoint document libraries to the Intralinks exchange, mark the **Allow document libraries to be mapped to exchange folders** option.

9. In the **Document Library** column, select the SharePoint library that you want to link.

10. If you *did not* mark the **Allow document libraries to be mapped to exchange folders** option, the SharePoint library is automatically mapped to the Intralinks exchange, and two-way syncing is automatically selected, meaning that all the contents of the Intralinks exchange will be synced with the library, and changes in either SharePoint or Intralinks will be synced to the other location. (If your Intralinks exchange uses custom fields, they will be synced to SharePoint, but SharePoint custom fields will not be synced to Intralinks. The values entered for these custom fields *will* be synced in both directions, however.) Skip to step 14.

11. If you marked the **Allow document libraries to be mapped to exchange folders** option, either select the exchange folder this library will be linked to, or enter a name to create a new folder on the exchange. If you create a new folder, Intralinks recommends that you use the SharePoint library's name for the folder.

    Also select the type of sync that will be performed:

    • **2 Way** (Bidirectional) — Changes made in the linked SharePoint library will be synced to the selected Intralinks exchange or folder, and vice versa.

    • **Intralinks -> SharePoint** (Intralinks to SharePoint) — Changes made in the selected Intralinks exchange will be synced to the linked SharePoint library. Changes made in SharePoint will not affect the contents of the Intralinks exchange in any way.

    • **SharePoint -> Intralinks** (SharePoint to Intralinks) — Changes made in the linked SharePoint library will be synced to the selected Intralinks exchange. Changes made in Intralinks will not affect the SharePoint library in any way.

    Important! Do not delete any library, exchange or folder that is used in your mappings. If you delete a library, exchange or folder, syncing will fail. These items cannot be re-created using the syncing process.
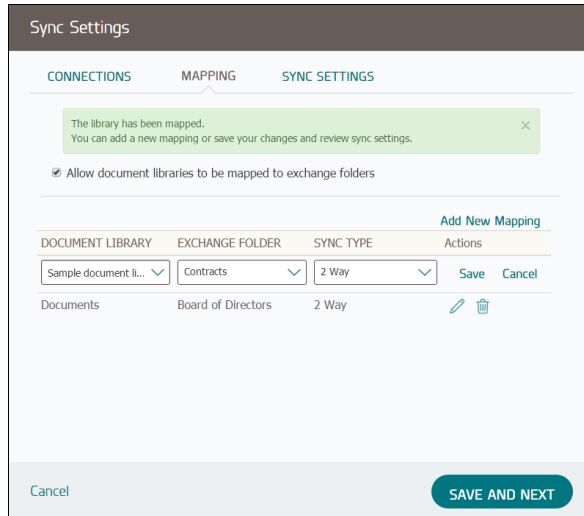
The Mapping view, showing multiple mappings.

12. Click **Save** to save your selections.

13. Click **Add New Mapping** and select the library, folder and sync type that will be used for the selected library. Create as many mappings as you need; be sure to click the **Save** link for each new mapping.

14. When you have finished making changes, click **Save and Next**. The **Sync Settings** tab appears.
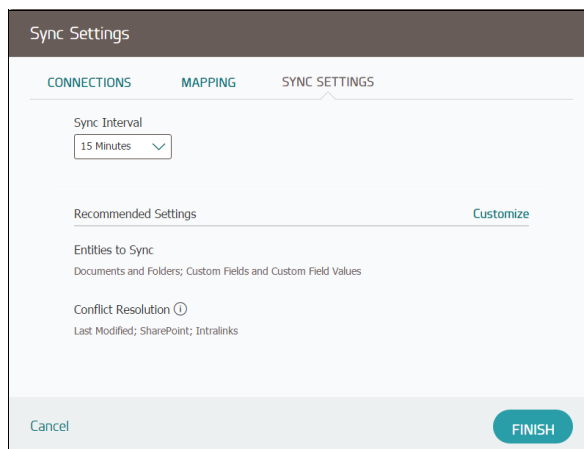
The Sync Settings view of the Sync Settings screen.

15. The default sync interval is 15 minutes, but you can choose a shorter or longer interval if you like. You can choose a sync interval between 5 minutes and one week. Your selection will determine the frequency with which your SharePoint site and the Intralinks exchange are compared and changes are synced.

    If you do not want changes to be synced automatically, choose **No Interval**. You will be required to sync changes manually if you choose this option.

16. A list of recommended settings is displayed on the screen; review these settings. If you want to make changes, click **Customize**.

    If you selected two-way (bidirectional) mapping in step 11, also indicate how conflicts should be handled. (Conflicts occur when a file has been changed on

both the SharePoint library and the Intralinks exchange since the last sync was performed.) Choose which file will be retained when conflicts arise: the file with the latest modified date, the file in SharePoint, or the file in Intralinks.

In cases where a conflict arises because a file was deleted in one location and updated in the other, you can prevent the file from being removed from both locations by marking the **Do not delete if conflict arises** option. If you mark this option, the updated version will remain untouched.

17. When you have made all the changes you wish to make, click **Finish**.

18. A message appears, telling you that your settings have been saved and asking whether you want to perform an initial sync of the newly mapped SharePoint library and Intralinks exchange or folder. To perform the initial sync, click **Continue**. The **Site Synchronization Settings** screen reappears with a message indicating that the initial sync is underway and a progress bar showing you the number of items that have been synced and the percentage of work completed, as shown below:

Initial sync in progress		
Syncing items	0%	
pprabhu@intralinks.com, **Exchange Name:** Legal Collaboration		**Sync Interval:** 15 Minutes
		Sync Log ⌄ ⚙
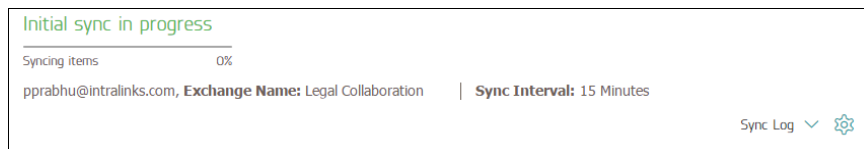
Initial Sync message and progress bar.

When the sync is complete, the screen will display a status of **Idle**, along with details about the sync that was just completed.

If you do not want to perform the initial sync now, click **Cancel**. You can perform the initial sync manually whenever you are ready for syncing to begin. For more information on performing a manual sync, see **"Manually synchronizing SharePoint and Intralinks" on page 28**.

19. Click the **Sync Log** link to see details about the sync. To learn more about the Sync Log, see **"Viewing the sync status for a linked library and Intralinks exchange" on page 26**.

▶ **To connect additional SharePoint sites to Intralinks exchanges**

1. In SharePoint, display your home page and click on the tab for the site you want to link to an Intralinks exchange.

2. In the menu on the left side of the screen, click, **Site Contents**. The **Site Contents** screen appears.

3. Click the icon for Intralinks Connector for SharePoint. The **Connections** tab of the **Sync Settings** screen appears.

4. Use the **Sync Settings** screen to set up your new connection, as you did with the initial connection. For more information, see **"To connect a SharePoint site to an Intralinks exchange for the first time" on page 17**.

Updating settings for email alerts

Email alerts can be sent to notify you when Reconciliation Reports are ready for viewing and when your Intralinks password is about to expire and a new password needs to be created.

▶ **To update email alert settings**

The Intralinks Connector for SharePoint should be displayed.

1. Click the bell icon in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Click on **Reconciliation Report**. Additional fields appear.

3. Review the suggested text in the **Subject Line** field. This text will appear in the subject line for the email messages sent to alert you when a Reconciliation Report is ready for viewing. You can change this text if you like.

4. In the **Recipients** field, enter your email address. If you want other people to be notified when these reports are ready, enter the people's email addresses. Separate each address with a semicolon (;).

5. Click **Save** to save your changes.

6. Click on **Password Expiration**. Additional fields appear.

7. Review the suggested text in the **Subject Line** field. This text will appear in the subject line for the email messages sent to alert you when your Intralinks password is about to expire. You can change this text if you like.

8. In the **Recipients** field, enter your email address. If you want other people to be notified when your password is about to expire, enter the people's email addresses. Separate each address with a semicolon (;).

9. Click **Save** to save your changes.

Viewing a list of sites that you have mapped

You can use the **My Connected Sites** screen to view a list of sites that you have mapped to Intralinks. This screen provides a quick overview of the sites' sync status, as well. The

▶ **To view a list of mapped sites**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying a number of options.

2. Select **My Connected Sites**. A list of Intralinks exchanges that have been linked to SharePoint sites appears.

The My Connected Sites screen.

3. To view the synchronization settings for a site, click on the site's name. The **Site Synchronization Settings** screen will appear. Click the gear icon ⚙ that appears next to the **Sync Log** link. The **Sync Settings** screen appears, displaying the currently selected sync settings for the libraries within this site.

Viewing your sync settings

You can view the currently selected sync settings at any time using the steps below.

▶ **To view your sync and mapping settings**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying a number of options.

2. Select **My Connected Sites**. A list of Intralinks exchanges that have been linked to your SharePoint sites appears.

3. Click on the exchange whose mapping you want to update. The **Site Synchronization Settings** screen appears.

4. Click the gear icon ⚙ that appears next to the **Sync Log** link. The **Sync Settings** screen appears.

5. Review the information on the screen. You can change the time selected for the sync interval if you like. When you have finished reviewing the information on the screen, click **Finish**.

If you want to make changes to any settings other than the sync interval, you must disconnect the Intralinks Connector first. Read the next section to learn more.

Making changes to your sync settings

If you are synchronizing multiple SharePoint libraries to multiple exchange folders, you can make any of the following changes.

- Map a new library to an exchange folder.

- Delete an existing mapping.

- Change the exchange folder that is mapped to a library.

- Change the library mapped to a exchange folder.

- Change the synchronization type of an existing mapping (upload, download, or bidirectional)

When you perform any of these processes, all jobs in progress will be completed before the connection, disconnection, or synchronization change is applied.

▶ **To edit or delete existing SharePoint library mappings**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **My Connected Sites**. A list of Intralinks exchanges that have been linked to SharePoint sites appears.

3. Click on the exchange whose mapping you want to update. The **Site Synchronization Settings** screen appears.

4. Click the gear icon ⚙ that appears next to the **Sync Log** link. The **Sync Settings** screen appears.

5. If the **Connections** tab is not displayed, click it.

6. If you wish only to change the sync interval, make the change and skip to step 15.

    If you wish to make any other changes, continue on to step 7.

7. Click **Disconnect**.

8. Ensure that the entry in the **User Name** field is correct. This should be the email address for the account used to run the Intralinks Connector. Always use a dedicated Intralinks account for the Intralinks Connector; do not use your own Intralinks account if you have one.

9. Enter the password associated with the email address that appears in the **User Name** field.

10. Click **Connect**.

11. When the connection is established, use the **Exchange Name** field to select the Intralinks exchange that will be mapped to your SharePoint library.

12. Click **Save and Next**. The **Mapping** view of the **Sync Settings** screen appears with the library and exchange mappings that were previously created.
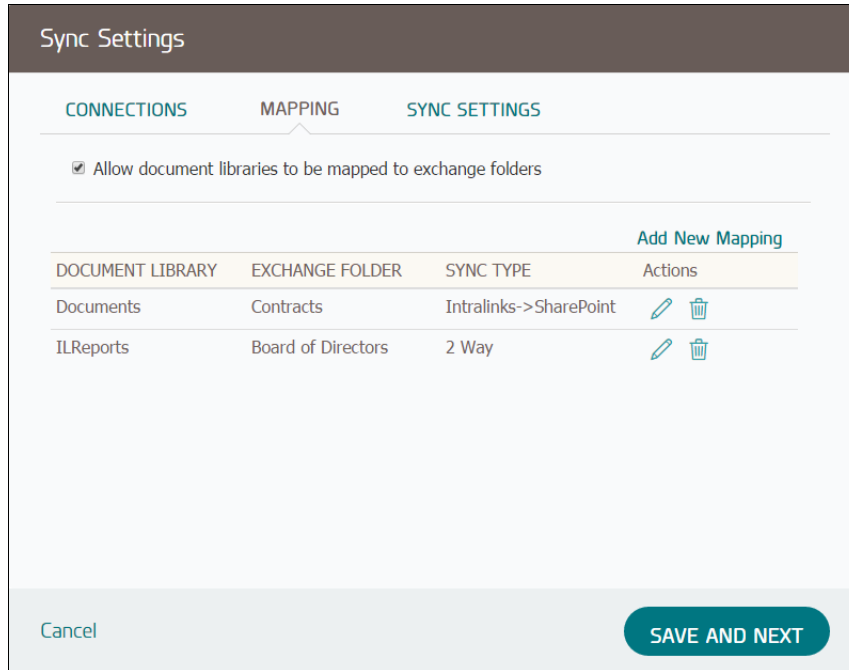
13. To edit a mapping, click the edit icon ✎ next to the mapping that you want to change.

- Select a new SharePoint library or exchange folder from the list.

- Select a synchronization type for this mapping.

  — **2 Way** (Bidirectional) — Changes made in the linked SharePoint library will be synced to the selected Intralinks exchange or folder, and vice versa.

  — **Intralinks -> SharePoint** — Changes made in the selected Intralinks exchange will be synced to the linked SharePoint library. Changes made in SharePoint will not affect the contents of the Intralinks exchange in any way.

  — **SharePoint -> Intralinks** — Changes made in the linked SharePoint library will be synced to the selected Intralinks exchange. Changes made in Intralinks will not affect the SharePoint library in any way.

To remove a mapping, click the 🗑 icon and skip to the last step of this procedure.

14. Click the **Save** link next to the mapping.

15. Click the **Save and Next** button at the bottom of the screen.

Managing the syncing process

Understanding sync success and failure

When a sync is completed, it is given a status of **Success** or **Failed**. A sync is considered successful if all the items (documents, folders, custom fields and custom field values) included in the sync are either synced successfully or skipped because of minor problems. For example, files may be skipped if their

name contains a symbol that is not allowed in SharePoint or Intralinks, or the files are of a type that is blocked by your organization's SharePoint policy.

A sync will have a Failed status if one or more items fail to be synced because of a more serious problem. For example, documents may fail to sync if you are syncing them to an Intralinks exchange that requires entries for custom fields, and those entries have not been made.

Files and folders are marked as excluded if they cannot be synced for three consecutive sync cycles. The Intralinks Connector does not attempt to sync excluded items during scheduled syncs. If you like, you can either remove the items from the library or exchange or fix the problem that prevents them from syncing. If you make a change to a skipped file, it will be synced again. If a SharePoint policy is changed, and a file that was excluded now is eligible for syncing, you must perform a manual initial sync, since no changes were made to the file itself.

After each sync is performed, the **Site Synchronization Settings** screen will display the number of items that were successfully synced, the number of items that failed, and the number of items that were skipped.

Viewing the sync status for a linked library and Intralinks exchange

You can use the **Site Synchronization Settings** screen to get a snapshot view of the current sync status for your linked SharePoint library and Intralinks exchange and more detailed information about recent sync attempts.

To display the **Site Synchronization Settings** screen, click the navigation icon ☰ in the menu bar on the left side of the Intralinks Connector screen. A panel slides out, displaying a number of options. Select **Site Synchronization Settings**.
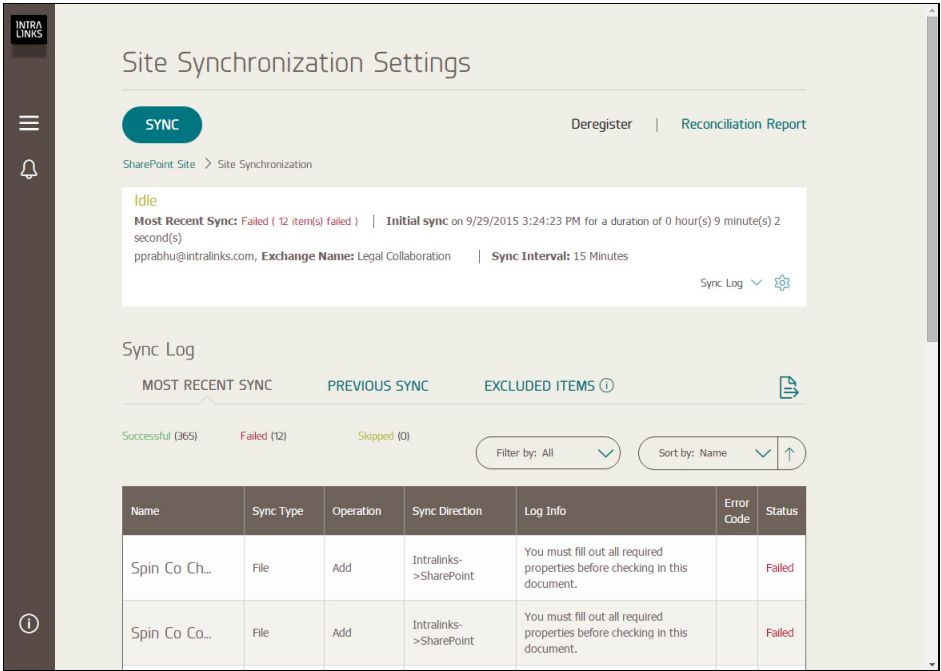
The **Site Synchronization Settings** screen shows the following information:

- The current sync status (**Syncing**, **Idle** or **Disconnected**).

- Information about whether the last sync was successful.

- The type of sync performed (initial or incremental).

- The time at which the sync was performed, and the amount of time needed to complete the sync.

- The email address for the account used to log into Intralinks

- The exchange name

- The sync interval

For more detailed information about the files included in the two most recent syncs, click the **Sync Log** link on the right side of the screen. Additional information will appear on the lower half of the screen.

You can view details for:

- The most recent sync.

  If a sync is underway, the log shows only the items that have failed to sync, have been skipped or have yet to be synced; once the sync is complete, the log will display information about all items.

- The previous sync.

- Files and folders that are being excluded.

For the most recent sync and the previous sync, you can view the name of each item that was synced, its type (file, folder, custom field), the action that was performed (add, update, delete), the direction in which the sync took place (Intralinks to SharePoint, or SharePoint to Intralinks), information about why a file failed or was skipped (if applicable), an error code that can be used for troubleshooting by your Intralinks Connector administrator if a file failed or was skipped, and the file's status (successful, skipped or failed).

You can use the **Filter by** and **Sort by** lists to reorder the information displayed and to narrow the information displayed on the screen.

Exporting the sync log

You can export the sync log that is currently displayed on your screen by clicking the Export button 🗋. The log will be exported as a Microsoft Excel worksheet. You may be asked to provide this document to your Intralinks Connector administrator if a problem prevents your site from syncing.

The log includes the most recent sync and excluded items. Excluded items can be identified using the **Excluded** column; if **Yes** appears in the column next to an item, it has been excluded.

Exported sync logs' names include the date and time the logs were created, the ID of the Intralinks exchange being synced and the name of the SharePoint site being synced, to help you differentiate them. For example, a sync log might be named *Sync log-2.17.2016 5.48.32 PM-012345678-Finance Repository.csv*; in this example, the log was created at 5:48 p.m. on February 17, 2016, for exchange 012345678 and a SharePoint site named *Finance Repository*.

Occasionally a sync log may be created without a .csv extension. If this is the case, open Microsoft Excel, then select the file using Excel to view the log's contents.

Manually synchronizing SharePoint and Intralinks

From time to time, you may want to perform a sync sooner than the next scheduled sync. or you may want to repeat the initial sync to be sure that the contents of the mapped SharePoint library and Intralinks exchange or folder are identical. You also may need to perform a manual initial sync to ensure that files that were skipped or that failed synchronization during a previous automatic sync cycle are synced as intended.

If you perform a manual sync, it will be given a higher priority than regularly scheduled sync sessions and will be performed before those sessions. Once the manual sync is complete, the regularly scheduled sync sessions will resume.

► **To manually synchronize a mapped library and Intralinks exchange or folder**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out.

2. Select **Site Synchronization Settings**. The **Site Synchronization Settings** screen appears.

3. Click **Sync**. The **Sync** screen appears.
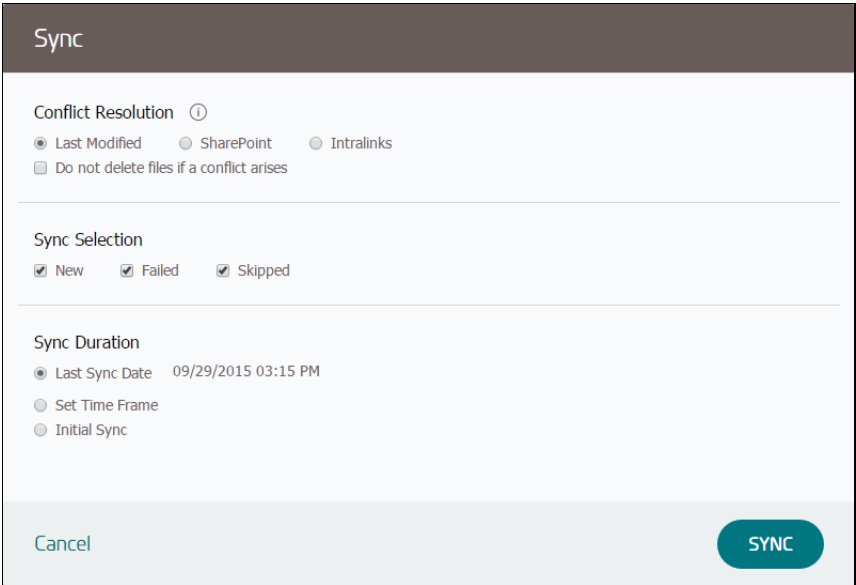
4. If the selected library and Intralinks are set to use two-way (bidirectional) mapping, indicate how conflicts should be handled. (Conflicts occur when a file has been changed on both the SharePoint library and the Intralinks exchange since the last sync was performed.) Choose which file will be retained when conflicts arise: the file with the latest modified date, the file in SharePoint, or the file in Intralinks.

In cases where a conflict arises because a file was deleted in one location and updated in the other, you can prevent the file from being removed from both locations by marking the **Do not delete if conflict arises** option. If you mark this option, the updated version will remain untouched.

5. If you are syncing documents and folders, indicate the content that you want to sync:

   New — Files that have been added since the last sync will be synced.

   Failed — Files that failed to sync previously will be selected for syncing. (If the problems that prevented them from being synced previously were not fixed, the files may continue to fail syncing.)

   Skipped — Files that could not be synced previously because of a minor problem will be selected for syncing. (If the problems that prevented them from being synced previously were not fixed, the files may continue to be skipped.)

6. If you want to perform an incremental sync, mark either the **Last Sync Date** option or the **Set Time Frame** option. If you select **Set Time Frame**, select a point of time within the past 7 days. All of the items that meet the criteria that you've specified and that have been added, changed or deleted since the selected date and time will be synced.

   If you want all contents to be synced regardless of the date and time on which they were added and changed, mark the **Initial Sync** option.

7. When you have made all of your selections, click **Sync**.

A progress bar appears showing both a visual indicator of syncing progress and a counter that displays the number of files that have been synced and the total number of files that are selected for syncing. (If other syncs are being performed, the sync session may be temporarily queued until system resources are available to perform the sync.)

Viewing connectivity status, version information, and downloading documentation

If you want to know whether you are connected to your SharePoint site, use the following procedure. You can also identify the software version number and download current documentation.

▶ **To view connectivity and version information, and download manuals**

The Intralinks Connector for SharePoint should be displayed.

◇ Click the Information icon on the navigation bar on the left side of the screen.

General information about the Intralinks Connector will appear, along with a link to installation and user guides for the Connector.

Viewing the Reconciliation Report

The Reconciliation Report lists all of the differences between your mapped SharePoint library and its associated Intralinks exchange — in effect, it is a snapshot of your system at the point at which the report is created.

The report indicates which folders and documents exist in common and which are only in either the SharePoint library or the Intralinks exchange. For documents that exist in both locations, the report indicates whether the documents are in sync. It also indicates files that are new sync the last sync cycle.

Only content that is being synced is shown on the report. Offline folders and exchange folders that are not mapped to the SharePoint library are not included in the report.

- The Reconciliation Report is generated under the ILReports Library. This library is created the first time you generate the Reconciliation Report.

  You can set an email preference to receive alerts when a report is generated.

- By default, three reports can be generated at one time. Your Intralinks Connector administrator may enable a higher (or lower) number of concurrent reports.

▶ **To run a Reconciliation Report**

You can run Reconciliation reports only once or set them up to be run on a daily or weekly basis. If you are running daily or weekly reports and decide to run a one-time report, be sure to set up the daily or weekly report again after you have run the one-time report.

If you set up recurring Reconciliation reports and later decide that you no longer want the reports to be generated automatically, run a one-time report.

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Site Synchronization Settings**. The **Site Synchronization Settings** screen appears.

3. Click the **Reconciliation Report** link on the right side of the screen. The **Reconciliation Report** screen appears.

4. Select an option for generating the report:

   Now — The report will be generated immediately. It will be generated only once.

   Later in the Day — The report will be generated at the time you specify. It will be generated only once.

   Daily — The report will be generated every day at the time you specify.

   Weekly — The report will be generated once a week on the day and time you specify.

5. Click **Generate Report**. A message will appear to let you know that the report is being generated.

6. Click **Cancel** to close the screen.

An email alert containing a link to the report will be sent to you (or the person you designated to receive the report) when the report is ready to view. You also can view the report by going to your SharePoint site and clicking on the **ILReports** link

in the navigation panel on the left side of the screen. The ILReports document library appears with report you generated at the top of the list. (The ILReports library is created automatically the first time you generate the Reconciliation Report.)

The report name includes the ID for the exchange that was reconciled and the date and time at which the report was generated.

Your Reconciliation Report will be similar to the following example:

The following information is provided on the Reconciliation Report:

- Date and time of the report

- Exchange ID and name for the exchange that was reconciled

- Site URL

- Sync status

   – **In Sync**

   – **LocalOnly**

   – **ILPOnly**

   – **NotInSync** (the item is present in both SharePoint and Intralinks but is not in sync)

- SharePoint item type

- SharePoint ID for the Item (folder or document)

- SharePoint title for the item

- SharePoint path for the item

- SharePoint file size

- Intralinks content type

- Intralinks content ID

- Intralinks content title

- Intralinks content path

- Intralinks file size

- File type

- Remarks

Read the **Status** column to determine the synchronization status of any item in the list.

Accessing your SharePoint site from the Intralinks Connector

To return to your SharePoint site while you are working in the Intralinks Connector, display the **Site Synchronization Settings** screen and click the **SharePoint Site** link that appears below the **Sync** button, as indicated below.
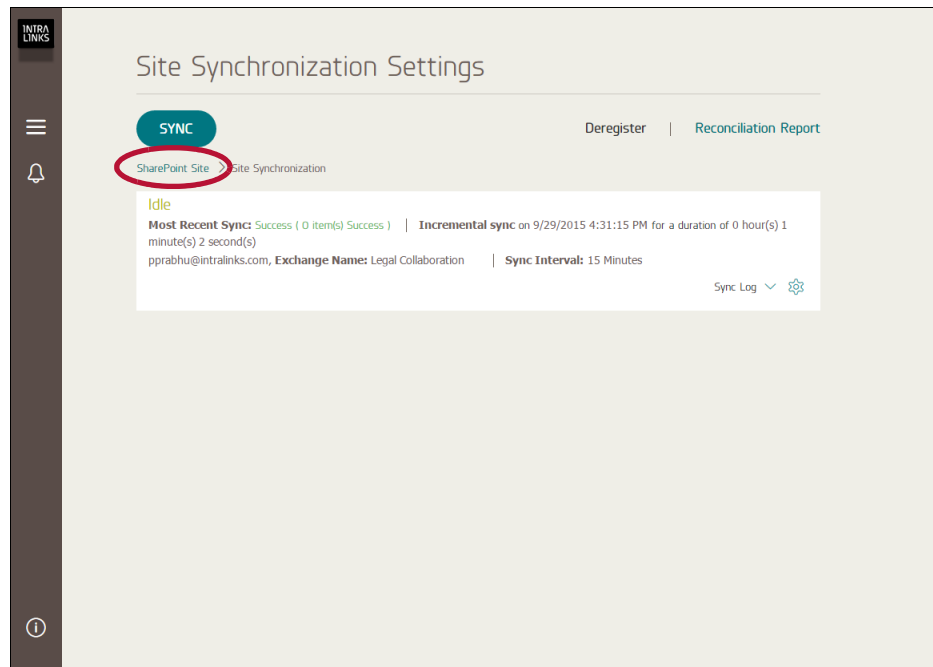
To display the **Site Synchronization Settings** screen, click the navigation icon
in the menu bar on the left side of the Intralinks Connector screen. A panel slides out, displaying a number of options. Select **Site Synchronization Settings**.

Disconnecting from your Intralinks exchange

If you no longer want your SharePoint library synchronized with your Intralinks exchange, you can disconnect from your exchange. All of your folders and files will be preserved.

Note: If you want to add, delete, or modify Intralinks folder mappings, you must first disconnect and reconnect to your Intralinks exchange. There is no need to disconnect if you wish to change only the sync interval.

► **To disconnect from your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Click the gear icon ⚙ that appears next to the **Sync Log** link. The **Sync Settings** screen appears.

3. Select **Site Synchronization Settings**. The **Site Synchronization Settings** screen appears.

4. Click on the **Mappings** tab to display the **Mappings** view.

5. Click **Disconnect**.

Deregistering from your Intralinks exchange

If you wish to stop using the Intralinks Connector with your SharePoint site, you can deregister the Intralinks Connector to remove all references to Intralinks from your SharePoint site. If you choose to deregister, the following items will be removed:

- All of the software and settings for the Intralinks Connector.

- The database that contains mapping information for synced files

- Document library columns and their values, if the linked Intralinks exchange uses custom fields for documents.

- Menu options for Intralinks Connector settings, including those for setting custom field values

- The service account, saConnector, which is used by the Intralinks Connector to access and update the SharePoint site.

Documents in SharePoint and Intralinks will *not* be affected in any way if you deregister.

You must disconnect from your Intralinks exchange (see above) before you can deregister. Be aware that deregistration will delete all settings (user name, exchange, SharePoint library, and so on) for the Intralinks Connector and will remove this mapping from the SharePoint administrator's dashboard, as well.

► **To deregister your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Site Synchronization Settings**. The **Site Synchronization Settings** screen appears.

3. Click **Deregister**.

Working with folders and documents

Once you have mapped one or more SharePoint libraries to an Intralinks exchange, documents and other content will be synced according to the selections you have made. Read the following sections to learn more about how syncing is handled and guidelines to follow to ensure that information is synced as you intended.

Note: Custom field definitions are synced between SharePoint and Intralinks regardless of the syncing option that you selected when you mapped your SharePoint library and Intralinks exchange. The **ILP -> SP**, **SP -> ILP** and **2 Way** options are used only for documents, folders and custom field values.

Folder and document syncing from SharePoint to Intralinks

The following rules apply to folders and documents:

- Folder names must not exceed 60 characters.

- Documents in your SharePoint library must be placed within folders or they will not be uploaded to the mapped Intralinks exchange.

- Subfolders created within a root folder in your SharePoint library are placed in the same relative position on your Intralinks exchange.

- Moving a folder within your SharePoint library results in its being moved to the same relative location within your Intralinks exchange.

- If you rename a folder within your SharePoint library, it is renamed on your Intralinks exchange.

- Deleting a folder or document within your SharePoint library results in its deletion on your Intralinks exchange.

- If you edit a document in your SharePoint library, the new version will be uploaded to your Intralinks exchange unless the document has been checked out or the folder containing the document is marked as offline.

If you wish to keep specific folders and documents on SharePoint alone, you can:

- Place the folders and documents in an unmapped SharePoint library.

- In a mapped library, mark a folder as offline to prevent it from being uploaded during synchronization.

- Set the folder/Library synchronization preference to **ILP -> SP** for any of the mapped libraries (if you are mapping multiple SharePoint libraries to an Intralinks exchange). No documents will be uploaded from those libraries.

To learn more, see **Marking a folder as offline**, **Checking documents in and out** and **Making changes to your sync settings**.

Folder and document operations from Intralinks to SharePoint

SharePoint libraries must be mapped top-level folders on Intralinks exchanges. Libraries cannot be mapped to subfolders.

- Any folders you add to your mapped exchange folder are automatically downloaded to your SharePoint library. Any subfolders or documents placed within the folders are downloaded, as well.

- Any folders you add to your SharePoint library are automatically uploaded to your mapped exchange folder. Any subfolders or documents placed within the folders are uploaded, as well.

The following rules apply to folders and documents:

- Folder names must not exceed 60 characters.

- Subfolders created within a top-level folder in your Intralinks exchange are placed in the same relative position on your SharePoint library.

- Moving a folder within your Intralinks exchange results in its being moved to the same relative location within your SharePoint library.

- If you rename a folder within your Intralinks exchange, it is renamed in your SharePoint library.

- Watermarked documents can be downloaded to your SharePoint site.

If you wish to keep folders and documents on your Intralinks exchange and not synchronize them, you can take one of the following actions:

- Keep the folders and documents in unmapped folders on your exchange.

- Set the folder preference to offline in SharePoint. This will prevent documents from being either uploaded or downloaded. For more information, see **Marking a folder as offline**,

- Set the folder/Library synchronization preference to **Upload** for any of the mapped libraries (if you are mapping *multiple* SharePoint libraries to an Intralinks exchange). No documents will be uploaded from those libraries.

Bidirectional synchronization

Bidirectional synchronization is automatic when you map a single SharePoint library to your Intralinks exchange. It is optional for each SharePoint library if you map more than one.

Bidirectional synchronization provides complete synchronization between a SharePoint library and the Intralinks exchange. It ensures that the folders and files in the SharePoint library and Intralinks exchange match.

Results
All new or changed items will be synchronized in both directions.

- Conflicts are managed according to your selections on the **Site Synchronization Settings** screen when you mapped the library to the exchange. A conflict occurs if a file is changed in both SharePoint and Intralinks during the same sync cycle. You can choose either SharePoint or Intralinks as your system of record, or you can choose to sync the file that was most recently modified, regardless of where it resides. You also have the option not to sync a file if it was modified on one system and deleted on the other.

- If a folder with the same name is added in both SharePoint and Intralinks, the folders will be mapped to one another and their contents will be synced. No duplicate folder will be created.

Working with documents and folders in SharePoint

Important! SharePoint is a Microsoft product, and the following procedures may change if Microsoft makes updates to SharePoint. Consult Microsoft's SharePoint documentation for the most up-to-date instructions.

▶ **To delete a SharePoint document**

To delete a document:

1. Place the cursor to the left of the document name until the check mark appears and right-click to highlight the document.

    A SharePoint pop-up window is displayed with information about the document.
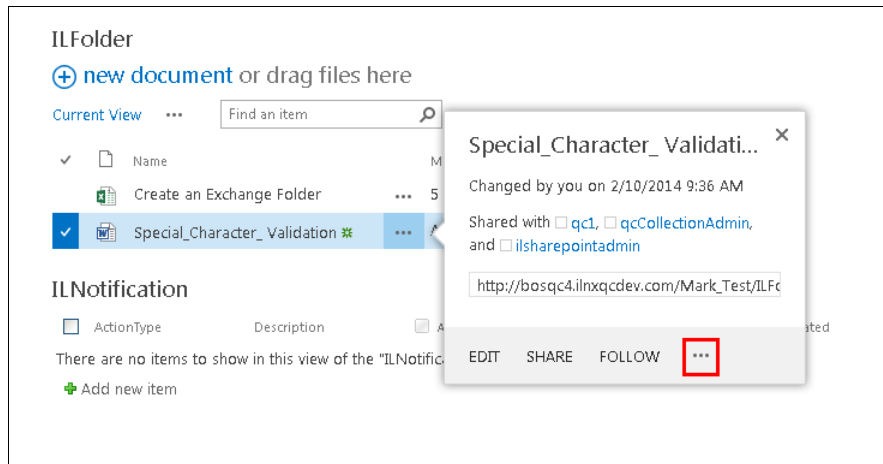
2. Click the ellipsis icon at the bottom of the window.

    The Intralinks menu is displayed.

3. Click **Delete**.

4. Click **OK** to confirm the deletion.

    The document is deleted from the SharePoint folder.

    It may also be deleted from your Intralinks exchange, but this depends on your synchronization settings.

▶ **To add new folders to your SharePoint library**

1. Place the cursor to the left of any folder name and click.

    The **Files** and **Library** tabs appear at the top of the screen.

2. Click the **Files** tab.

3. Click the **New Folder** icon.

    The **Create a new folder** box is displayed.

4. Enter a name for the new folder and click **Save**.

Note: Folder names must not exceed 60 characters.

The folder appears in the SharePoint library.

The new folder may be automatically uploaded to your Intralinks exchange, depending on your synchronization settings.

▶ **To delete a SharePoint folder**

Note: If you have a single Document Library mapped to a single Intralinks exchange (that is, you are not using Advanced Folder Mapping), you can delete folders using steps 2-5 below.

1. If you want to delete mapped folders from your SharePoint site or from your Intralinks exchange, remove the SharePoint library/Intralinks Folder mappings first. See To edit or delete existing SharePoint library mappings.

2. Place the cursor to the left of the folder name until the check mark appears and right-click to highlight the folder.

   A SharePoint pop-up window is displayed with information about the folder.
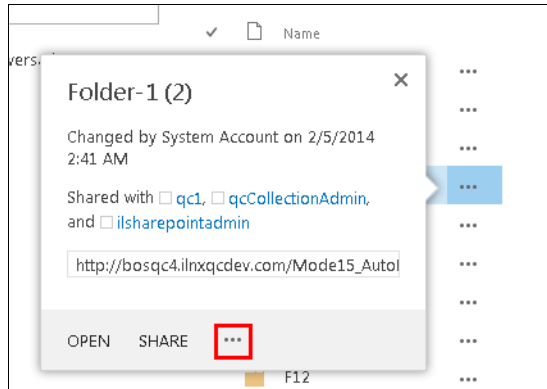
3. Click the ellipsis icon at the bottom of the window.

   The Intralinks menu is displayed.
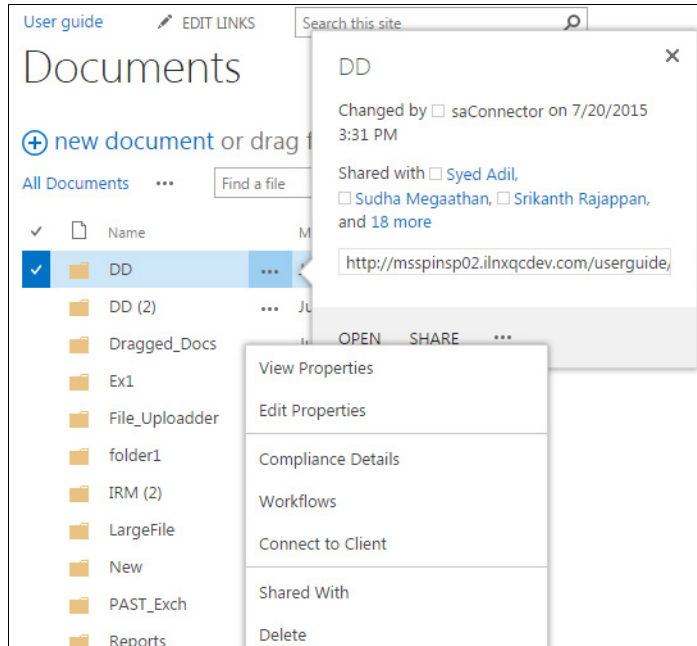
4. Click **Delete**.

5. Click **OK** to confirm the deletion.

   The folder and its contents are deleted from your SharePoint library.

   They may also be deleted from your Intralinks exchange, but this depends on your synchronization settings.

6. Remap the SharePoint library/Intralinks Folder to reestablish synchronization. See To edit or delete existing SharePoint library mappings.

▶ **To add documents to your SharePoint library**

1. Open the folder or subfolder in which you want to place the new document.

   Note: If you don't select a folder, the document will be placed on your desktop but it cannot be uploaded to your Intralinks exchange, even if you have bi-directional or SharePoint to Intralinks synchronization on. Documents must be placed in folders to by synchronized with Intralinks exchanges.

2. Click **+ new document**

   The **Add a Document** screen is displayed.

   You can also drag a file from your desktop onto the area where your file and folders are.

3. Click the **Browse** button and locate the file you want to load from the **File Upload** box.

4. Click **Open**.

   The **Add a Document** screen is displayed.

   If you have uploaded this document before, you can overwrite the existing version (the default) or add a new version by deselecting the **Overwrite existing file** check box. If you decide to add a new version, you must rename the file.

5. Click **OK**.

The "<Folder Name>—<Document Name>" screen opens. You will only see this screen if you have defined and published custom fields on your exchange.

You can add a title and complete any custom fields you want to associate with the document. You must add custom field information if it is required. Required fields have an asterisk (*) next to them.

6. Click **Save**.

After a pause, the document will be uploaded to SharePoint.

It may also be uploaded to your Intralinks exchange, but this depends on your synchronization settings and whether you placed the document within a folder.

▶ **To upload multiple documents to your SharePoint library**

SharePoint allows you to load multiple documents into your SharePoint library without using Windows Explorer, though that option is still available (see below).

Note: The Intralinks Connector does not support drag-and-drop functionality using Internet Explorer 8 or 9.

1. Open the SharePoint folder to which you want to copy the documents.

2. Select multiple files using the CTRL key and drag them to **+ new document** in your SharePoint library.

The documents are uploaded.

Note: When multiple documents are uploaded, any required custom fields must be completed. A green box with a downward-pointing arrow appears next to the file name indicating that these documents are checked out. You must perform two additional procedures on each document before it can be uploaded to your Intralinks exchange.
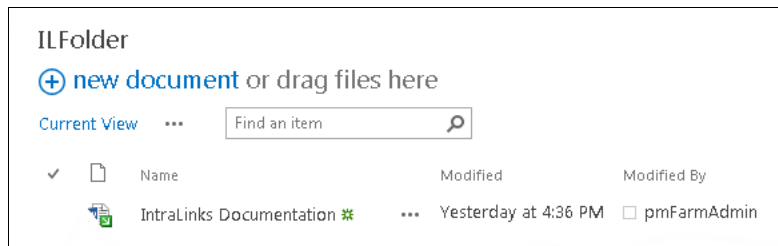
3. To add the required custom fields, see Editing custom field values.

4. Then, see To check in a document.

Once you complete these procedures, the documents will be uploaded to your Intralinks exchange if you have the appropriate synchronization setting.

▶ **To upload multiple documents to your SharePoint library using Windows Explorer**

You can also add multiple documents to your SharePoint library using Windows Explorer.

1. Click **+ new document**

The **Add a Document** screen is displayed.

2. Click **Upload files using Windows Explorer instead**.

   Your SharePoint library opens in a Windows Explorer window.

3. Open another window containing the files you wish to upload.

4. Select the folder you wish to place the files in an drag the files from your computer into the SharePoint Windows Explorer window.

5. When you are done adding documents, close both Explorer windows and return to the SharePoint **Add a Document** screen and click **Cancel**.

6. Open the appropriate folders to verify that the documents were copied.

   Note: When multiple documents are uploaded, any required custom fields must be completed. A green box with a downward-pointing arrow appears next to the file name indicating that these documents are checked out. You must perform two additional procedures on each document before it can be uploaded to your Intralinks exchange.
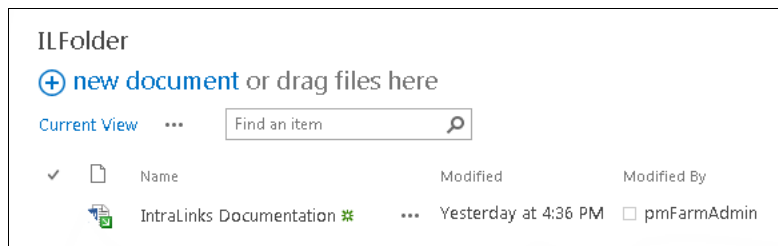
7. To add the required custom fields, see Editing custom field values.

8. Then, see To check in a document.

   Once you complete these procedures, the documents will be uploaded to your Intralinks exchange if you have the appropriate synchronization setting.

▶ **To replace symbol characters with an underscore**

You can use a setting on the **Site Configuration** screen to replace all disallowed characters (~#%&*{}\:<>?/|"[]=;) with underscore (_) characters. To change symbol characters to underscore characters, be sure the setting is set to TRUE.

▶ **To display the Intralinks ID for folders and files in the mapped document library**

You can use a setting on the **Site Configuration** screen to show or hide a column displaying the Intralinks ID for folders and files in the mapped document library. To display Intralinks IDs, be sure the DISPLAY_INTRALINKS_ID setting is set to TRUE.

Understanding Intralinks IRM protections in SharePoint

Intralinks allows exchange managers to apply Information Rights Management (IRM) protections to documents in their exchanges. IRM protections are applied on a group-by-group basis, and the different levels of protection can be selected for different groups. Manager can require that users enter their Intralinks credentials before viewing downloaded documents; they also can prevent

protected documents from being printed. Additionally, they may apply watermarks to protected documents.

If you are a member of a group on a mapped Intralinks exchange and an exchange manager applies protections to a document for your group, those protections will continue to apply if the document is synced to SharePoint. If this is the case, only the people who are included in your Intralinks group will be able to view the document, and they will have to enter their credentials before viewing the document.

If you are a manager on the exchange and do not belong to a group, or if no protections are selected for your group, everyone who has access to your SharePoint site will be able to view the document without restrictions.

Moving mapped documents within SharePoint

If are synchronizing your SharePoint library with your Intralinks exchange, and you move mapped documents in SharePoint from one folder to another, they will be moved to the corresponding folders on your Intralinks exchange.

However, if you move a document from a mapped SharePoint library to an unmapped SharePoint library, it will be removed from the mapped Intralinks exchange folder.

The same is true if you move a document from a mapped Intralinks exchange folder to an unmapped exchange folder. The document will be removed from the mapped SharePoint library.

Marking a folder as offline

When you designate a folder or subfolder as "offline," you prevent it from being uploaded to the Intralinks platform during synchronization. When you wish to upload the folder or subfolder, you can remove its offline status.

Note: If you want to begin syncing an offline folder, unmark the **Offline** setting described below and perform a manual initial sync to ensure that the contents of the folder are synced. If you do not perform a manual initial sync, changes made while the folder was offline will not be synced to Intralinks.

Important! Intralinks does not recommend moving files between online and offline folders.

▶ **To mark a folder as offline**

Your SharePoint library should be displayed.

1. Create a new folder or subfolder in your SharePoint library, or locate an existing folder or subfolder that you wish to mark as offline.

2. Place the cursor to the left of the folder name until a check mark appears; right-click on the check mark.

   A SharePoint pop-up window appears with information about the folder.
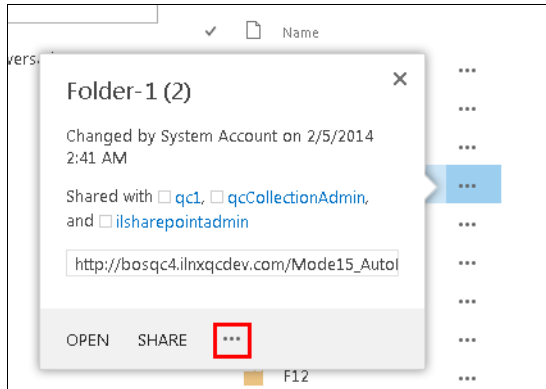
3. Click the ellipsis icon at the bottom of the window. The Intralinks menu is displayed.
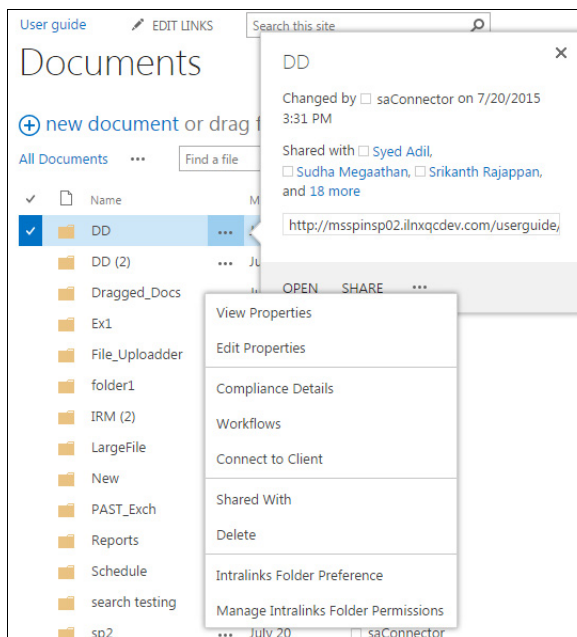
4. Click **Intralinks Folder Preference**.

    The **Intralinks Folder Preference** screen is displayed.
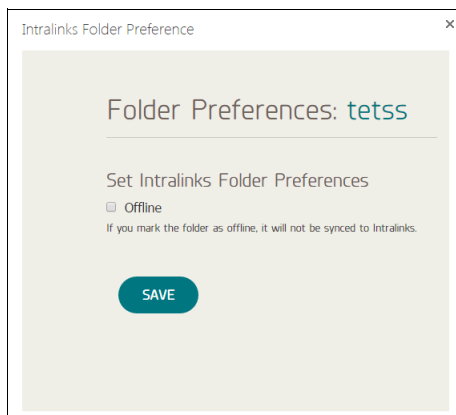
5. Select the **Offline** option and click **Save**.

Files placed in this folder will *not* be uploaded to your Intralinks exchange nor will files placed in the corresponding Intralinks exchange folder be downloaded to SharePoint.

If you unmark the **Offline** option, you must perform a manual initial sync to ensure that the contents of the folder are synced. If you do not perform a manual initial sync, changes made while the folder was offline will not be synced to Intralinks.

Preventing folders from being uploaded

If you are using folders that you don't want to upload during the synchronization process, you can place them in a SharePoint library other than the one synchronized with your Intralinks exchange.

Checking documents in and out

If you are working with a document and you don't want it to be uploaded to your Intralinks exchange when you save changes, you can check the document out.

▶ **To check out a document**

Your SharePoint library should be displayed.

1. Locate the document that you want.

2. Click on the ellipsis icon that appears next to the document's name. A SharePoint pop-up window is displayed with information about the document.
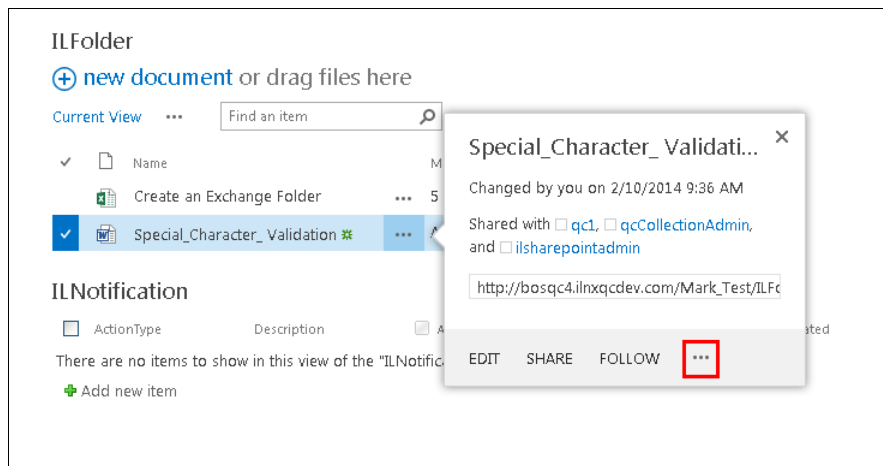
3. Click the ellipsis icon at the bottom of the window. The Intralinks menu is displayed.

4. Select **Check Out**.

A green box with a downward-pointing arrow appears next to the document name. This indicates that the document has been checked out. The document won't be uploaded to your Intralinks exchange until you check the document back in.

> **ILFolder**
>
> ⊕ **new document** or drag files here
>
> Current View · · · | Find an item 🔍 |
>
> | ✓ | 📄 | Name | Modified | Modified By |
> | | 📑 | IntraLinks Documentation ✳ · · · | Yesterday at 4:36 PM | ☐ pmFarmAdmin |

▶ **To check in a document**

Your SharePoint library should be displayed.

1. Locate the document that you want.

2. Click on the ellipsis icon that appears next to the document's name. A SharePoint pop-up window is displayed with information about the document.

3. Click the ellipsis icon at the bottom of the window. The Intralinks menu is displayed.

4. Click **Check In**. The **Check In** screen appears.

5. If you have edited the document and want to post those edits, but you want to continue editing the document later, select the **Yes** option next to **Retain your check out after checking in?** and click **OK**.

6. (Optional.) Add any comments you wish in the **Comments** box.

7. Click **OK**.

   If you have made changes to the document, it will be automatically uploaded to your Intralinks exchange.

Using Discard Check Out

If you have checked a document out and you have decided not to edit it, you can select the **Discard Check Out** menu choice to check it in. If you use the **Check In** option described above, a notice that you revised the document will be created. If you select **Discard Check Out**, the document will be checked in but this notice will not be generated.

Viewing document access information

You can use SharePoint to view a report that shows who has viewed or downloaded a specific document on the Intralinks exchange.

▶ **To view a Document Access report**

Your SharePoint library should be displayed.

1. Locate the file you want.

2. Click on the ellipsis icon that appears next to the document's name. A SharePoint pop-up window is displayed with information about the document.
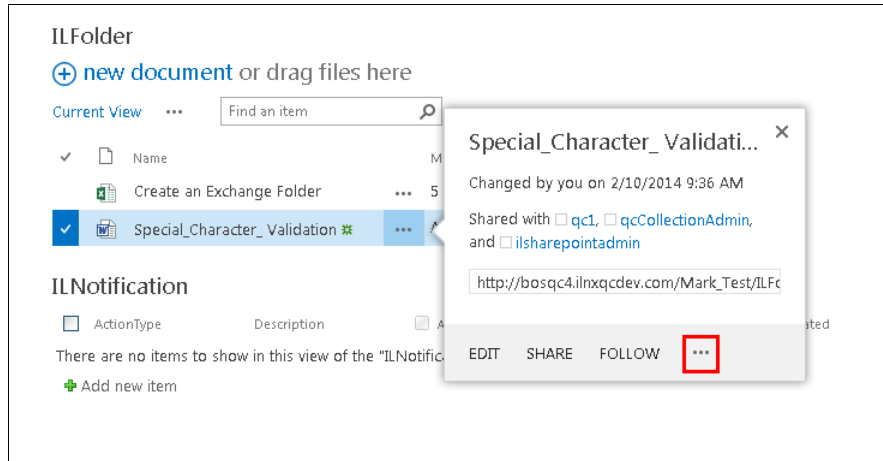
3. Click the ellipsis icon at the bottom of the window.

   The Intralinks menu is displayed.

4. Select **View Intralinks Document Access Report** from the menu.

   A screen opens, displaying the following information:

   - The names of all the users who have viewed this document

   - The group each user belongs to. If a user is a member of multiple groups, an entry will appear for each group, even if the person looked at the document once.

   - The first date and time the user viewed this document

   - The last date and time the user viewed this document

5. When you have finished viewing the report, close the screen to return to your SharePoint library.

Entering values for document custom fields

Intralinks allows exchange users to capture detailed information about documents and user groups using *custom fields*. Custom fields can be used, for example, to enter specific pieces of information such as expiration dates and internal tracking numbers. These fields can be defined for each exchange and must be published in Intralinks before they will be available in SharePoint.

Custom fields cannot be created using SharePoint or the Intralinks Connector. If you wish to begin using custom fields or modify existing custom fields, either ask an exchange manager with the Manager Plus exchange role to create and publish the custom fields or consult with your Intralinks administrator.

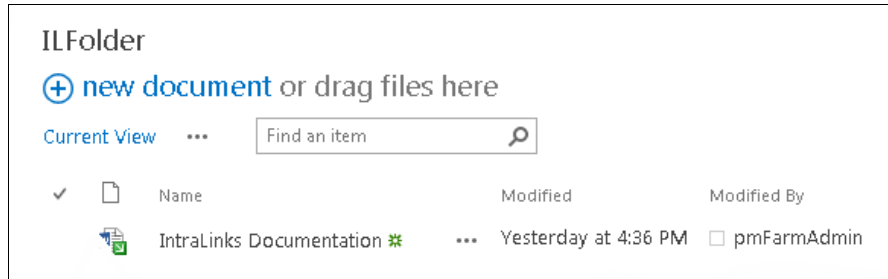**Important!** If a custom field is disabled in Intralinks Platform, the corresponding document library column and all the values associated with it will be removed from the SharePoint library. Use care when disabling custom fields in Intralinks exchanges that are mapped to SharePoint libraries.

Assigning custom fields in the Intralinks Connector

Once custom fields have been defined and published for your Intralinks exchange, they will be available in SharePoint when you add a new document or create a new group.

Some custom fields may be required. You will need to enter values for these fields for each new document or group that you add in SharePoint. Documents and groups that are missing required custom field values will not be uploaded to Intralinks.

When you add a document to your SharePoint library, you will be given the opportunity to complete any of the custom fields that are used in the Intralinks exchange. Some custom fields are optional, and some may be required.

The screen below appears after you upload a file to SharePoint:
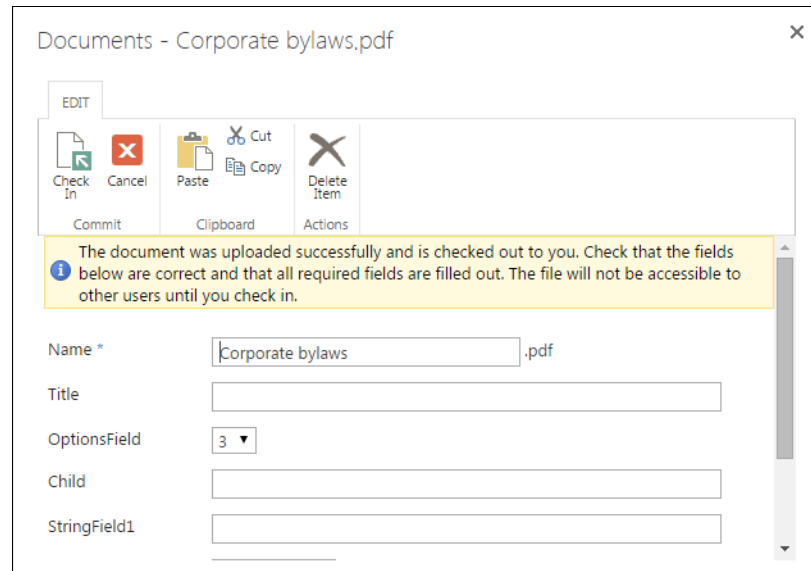
Complete the fields and click **Save** to save your changes. Fields that are marked with an asterisk are required. Fields without an asterisk are optional.

Required fields

Required custom fields are indicated by an asterisk next to the field. If you do not complete these fields, the document will be uploaded to your SharePoint library, but it will not be uploaded to the Intralinks exchange.You can tell if this has occurred by the appearance of a green box with a downward-pointing arrow next to the file name. This means the file is checked out.

Editing custom field values

Use the steps below edit custom field values for documents that have been uploaded to SharePoint.

▶ **To edit custom field values after you upload a document**

Your SharePoint library should be displayed.

1. Locate the document that you want.

2. Click on the ellipsis icon that appears next to the document's name. A SharePoint pop-up window is displayed with information about the document.
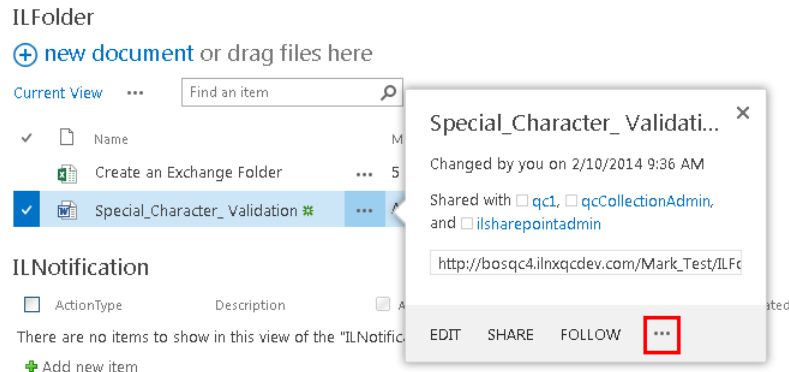
3. Click the ellipsis icon at the bottom of the window. The Intralinks menu is displayed.
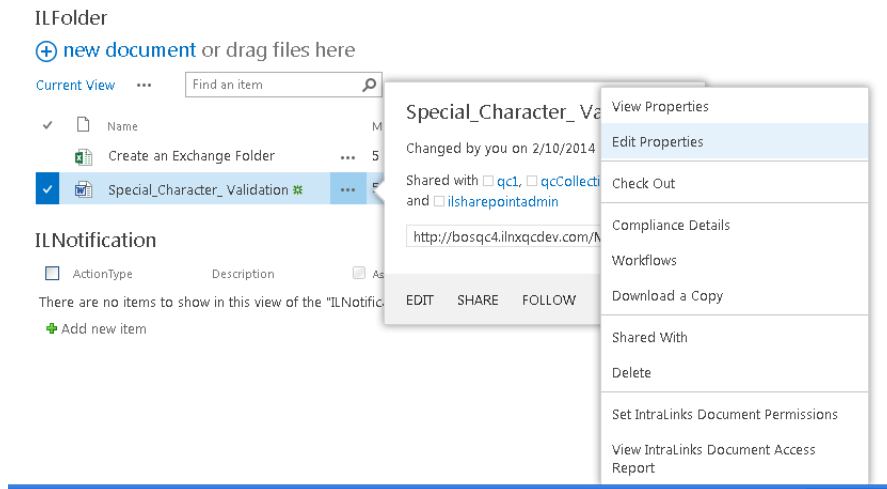
4. Click **Edit Properties**. The **Edit Document Properties** screen appears.

5. Edit the custom field values as needed and click **Save**.

If you added values for any required custom fields that were blank, be sure to check in the document so that it can be synced to the Intralinks exchange.

Working with permissions

Documents are protected only for those Intralinks groups you select during the permissioning process. If you do not select all of the groups on the exchange, some exchange users will not have access to these documents. All SharePoint users can see all documents, unless you apply SharePoint permissions to them.

Keep in mind the following details about permissioning:

- SharePoint folders that are mapped to Intralinks can be permissioned at both the folder and document level.

  - If you add documents to a permissioned folder, these documents are assigned the folder permissions automatically.

- Documents within folders can be assigned permissions different from those assigned to the folder.

- If you modify permissions on a folder, these modifications are applied to all the documents within the folder that don't have their own assigned document permissions.

- Subfolders automatically assume the permissions assigned to their parent folder.

- The permissions assigned to subfolders can be changed to be different from their parent folder.

- Permissions granted in SharePoint override the permissions granted in Intralinks.

For a full description of Intralinks permissions, see the *Intralinks Platform User Guide for Managers and Publishers*.

Viewing and setting permissions for folders in Intralinks

Use the steps below to view and set permissions for folders in the Intralinks exchange. Keep in mind that these permissions are different from those that may be applied to folders in SharePoint.

▶ **To view and set permissions for folders in Intralinks**

Your SharePoint library should be displayed.

1. Place the cursor to the left of the folder name until a check mark appears; right-click on the check mark.

   A SharePoint pop-up window appears with information about the folder.
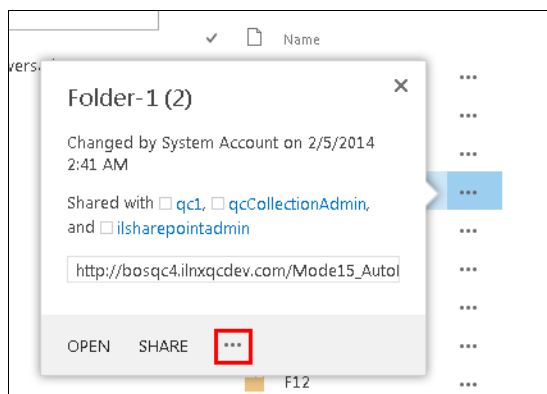
2. Click the ellipsis icon at the bottom of the window. The Intralinks menu is displayed.
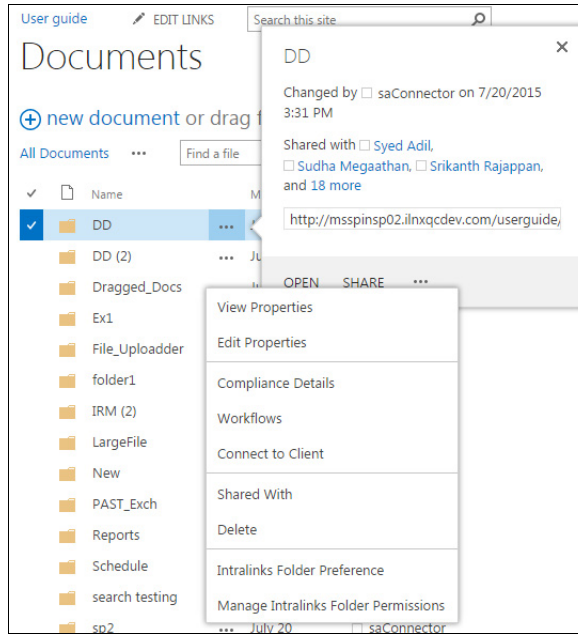
3. Select **Manage Intralinks Folder Permissions**.The **Manage Folder Permissions** screen is displayed.
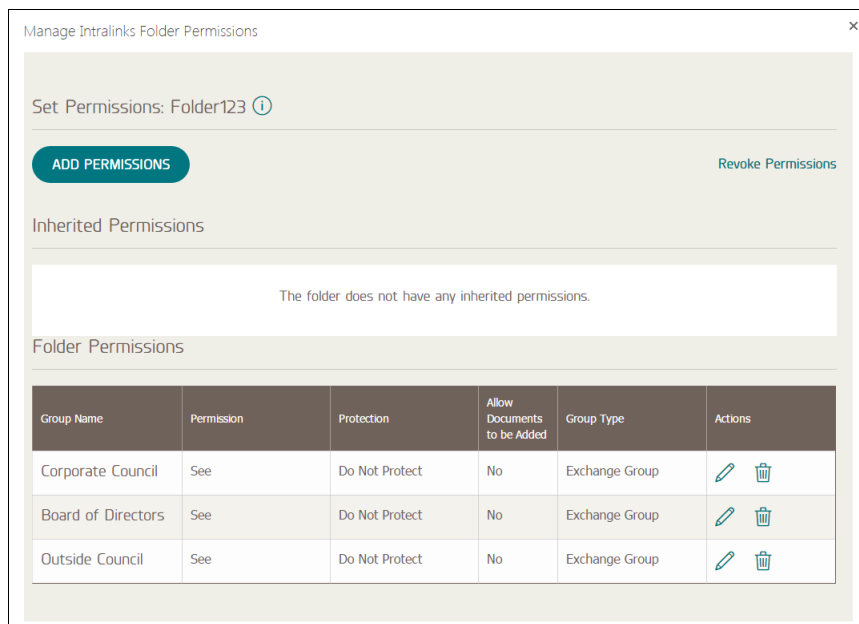
4. Click the **Add Permissions** button. The **Add/Update Group Permissions** screen appears. Review the information on the screen and make any needed changes.

Add/Update Group Permissions

3 Group(s) Selected

Search Groups

GROUP NAME	PERMISSIONS	PROTECTIONS	ALLOW ADDING DOCUMENTS	GROUP TYPE
☑ Corporate Council	See ⌄	Do not protect ⌄	☐	Exchange Group
☑ Board of Directors	See ⌄	Do not protect ⌄	☐	Exchange Group
☑ Outside Council	See ⌄	Do not protect ⌄	☐	Exchange Group
☐ SyedaGroup	See ⌄	Do not protect ⌄	☐	Exchange Group
☐ ExchangeGroup	See ⌄	Do not protect ⌄	☐	Exchange Group

Cancel   **SET PERMISSIONS**

5. To give a group permission to view the selected folder's contents, click the box next to the group's name. A check mark will appear in the box.

    To remove a group's permission to access a folder's contents, click on the box to remove the check mark.

6. In the **Permissions** column, select one of the following:

    •   **None** — Members of the specified group cannot view documents in the folder, and the folder itself does not appear for these users (unless individual documents are given different permissions).

    •   **See** — Members of the specified group can only view documents in this folder (unless the document is assigned different permissions).

    •   **Control** — Members of the specified group can edit, delete, and perform other actions with the documents in this folder (unless the document is assigned different permissions).

7. In the **Protections** column, select one of the following:

    •   **Do Not Protect** — Members of the selected group can view, save, and print the documents in this folder (unless individual documents are assigned different protections).

    •   **Protect** — Members of the selected group can view or print the documents in this folder; they cannot save them (unless individual documents are assigned different protections).

    •   **Protect/No Print** — Members of the specified group can only view the documents in this folder; they cannot save or print them (unless individual documents are assigned different protections).

8. If the Limited Publishing exchange setting has been activated on the Intralinks exchange, an **Allow Adding Documents** column appears. Mark the box in this column to allow Reviewers and Previewers in a group to add documents to this folder.

9. Click **Set Permissions**.

Viewing and setting permissions for individual documents in Intralinks

You can set permissions for individual documents for each group on your Intralinks exchange. Your selections will override the settings that were made for the folder containing the document.

Keep in mind that these permissions are different from those that may be applied to the documents in SharePoint.

▶ **To view and set permissions in Intralinks for individual documents**

Your SharePoint library should be displayed.

1. Locate the document that you want.

2. Click on the ellipsis icon that appears next to the document's name. A SharePoint pop-up window is displayed with information about the document.

3. Click the ellipsis icon at the bottom of the window. The Intralinks menu is displayed.

4. Select **Manage Intralinks Document Permissions** from the menu.

   The **Set Intralinks Document Permissions** screen is displayed.
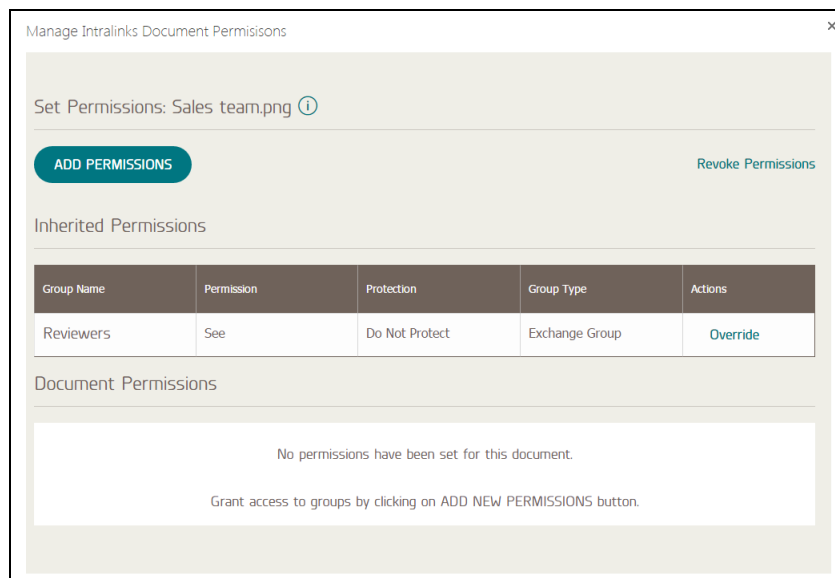
Perform the following steps for each group you wish to assign document permissions:

5. Select the **Override** option.

   This option appears only if folder-level permissioning has been enabled for the Intralinks exchange.

6. Under **Permissions**, select one of the following:

   • **None** — Members of the specified group cannot view the document.

   • **See** — Members of the specified group can only view the document.

- **Control** — Members of the specified group can edit, delete, and perform other actions with the document.

7. Under **Protections**, select one of the following:

   - **None** — Members of the selected group can view, save, and print the document.

   - **Protect** — Members of the selected group can view or print the document; they cannot save it.

   - **Protect/No print** — Members of the specified group can only view the document; they cannot save or print it.

8. Review your settings. If you change your mind, click the **Revoke Permissions** button. Your changes will be removed.

9. Click **Save**.

10. When you have finished setting permissions and protections, close the screen to return to your SharePoint library.

Working with groups

You can use the Intralinks Connector for SharePoint to manage groups and users in mapped Intralinks exchanges. Note that any changes you make to groups and users are made immediately in Intralinks. These changes are not included in the sync process.

Adding a group to your Intralinks exchange

▶ **To add a group to your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. In SharePoint, display your home page and click on the tab for the site you want to link to an Intralinks exchange.

2. In the menu on the left side of the screen, click, **Site Contents**. The **Site Contents** screen appears.

3. Click the icon for Intralinks Connector for SharePoint. The **Site Synchronization Settings** screen appears, displaying a message that no sync activities have been set up.

4. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

5. Select **Groups**. The **Groups** screen appears.

6. Click **New Group**. The **Create New Group** screen appears.

7. Enter a name for the group.

8. Select the type of group you want to create:

   - **Exchange groups** — Exchange groups are perhaps the most flexible type of user group for exchange management purposes; these groups are used solely to speed permissioning for documents and comments. Users can be added and removed from these groups at any time, can have any role and can belong to more than one organization. Users can be

included in any number of exchange groups. These groups are purely a management tool; members don't gain any rights or responsibilities simply by being a member of the group.

- **Collaboration groups** — This type of group is available only if the **collaboration group** exchange setting is marked (on). Collaboration groups can include members with any kind of exchange role; all the members of the group can see one another regardless of their exchange roles.

  Important! All members of collaboration groups, including those with the role of Hidden Manager Plus, are visible to one another, regardless of their exchange roles. If a user with the role of Hidden Manager Plus is added to a collaboration group, that person is visible to all the other members of the group.

- **Buyer groups** — This type of group is available only if the **buyer group** and **collaboration group** exchange settings are marked (on). Buyer groups can include only reviewers and previewers. All the members of each group are visible to one another. For this reason, be sure not to mix users from different organizations in a single buyer group.

Users can belong to multiple exchange or collaboration groups. Each user can belong to only one buyer group.

9. (Optional.) You can add notes about the group if you like. These notes are for reference purposes only; they do not appear on reports.

10. (Optional.) If document content searching (full-text searching) is enabled for the exchange, you can give the group the ability to perform searches on documents' contents, notes entered for documents and folders, and the titles of documents and folders. To do so, mark the **Allow group members to search document content** option.

    If this option is unmarked or if it does not appear, group members will be able to search only the titles of documents and folders.

11. Click **Save and Next**. The **Members** tab appears.

12. (Optional.) Select the people who will be members of this group. Only people who have access to the Intralinks exchange are displayed. To select a person, click the box next to the person's name.

    This step is not required. You can add people to the group at a later time.

13. When you have finished selecting group members, click **Save and Next**. The **Custom Fields** screen appears.

    If the Intralinks exchange does not use custom fields, skip to step 15.

14. Make an entry for every field that applies to groups on this exchange. We recommend that you enter information consistently for every group to ensure accuracy when reports are printed for these groups.

15. When you have finished making entries, click **Save and Close**.

Viewing the members of an Intralinks group

▶ **To view the members of an Intralinks exchange group**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Groups**. The **Groups** screen appears, listing existing groups. To view a list of members for a particular group, click the icon in the **Members** column for that group. A screen appears listing the members of the group.

3. When you have finished viewing group members, click **OK**.

Adding or removing people from Intralinks groups

▶ **To add or remove an exchange group member**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Groups**. The **Groups** screen appears, listing existing groups. To view a list of members for a particular group, click the pencil icon ✎ in the **Actions** column for that group. The Create New Group screen appears.

3. Click the **Members** tab and mark the box next to the people you want to add to the group. Unmark to box to remove an existing group member.

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

5. Click **Save and Close** to close the **Groups** screen.

Deleting Intralinks groups

▶ **To delete a group from your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Groups**. The **Groups** screen appears, listing existing groups. To delete a particular group, click the trash can icon 🗑 in the **Actions** column for that group. A message appears asking you to confirm your choice. You also have the option to remove the group members from the exchange. If you remove the group members from the exchange, their membership in other exchanges will not be affected in any way.

3. Click **Confirm** to delete the group.
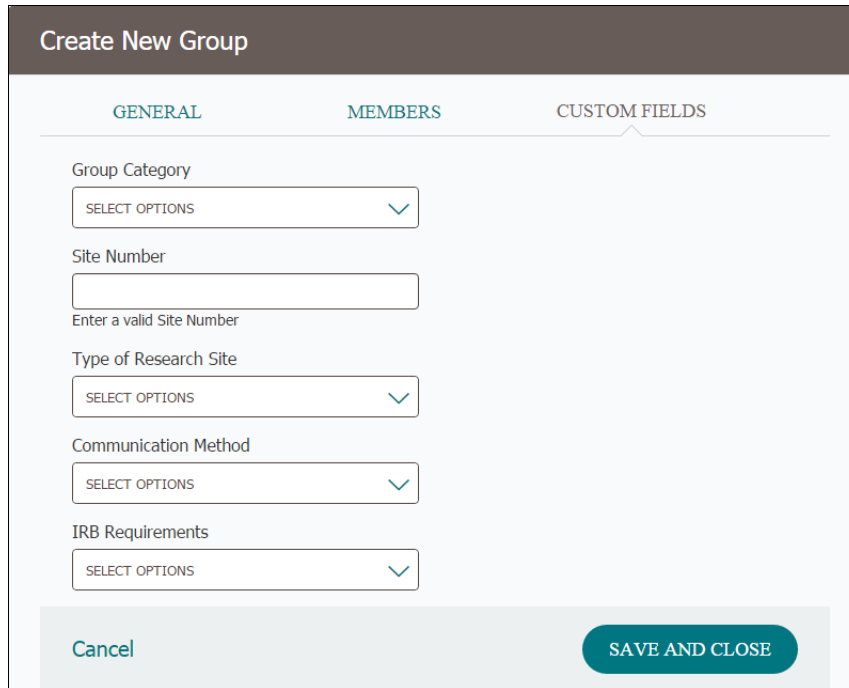
Viewing and editing group custom fields

Use the procedure below if you need to view or update custom group values for Intralinks groups.

▶ **To view or edit group custom fields**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Groups**. The **Groups** screen appears, listing existing groups. To view the custom fields for a particular group, click the pencil icon 🖉 in the **Actions** column for that group. The Create New Group screen appears.

3. Click the **Custom Fields** tab.

4. When you have finished making any needed changes to the custom fields, click **Save and Close**.

Working with users

You can add and remove users from your Intralinks exchange directly from SharePoint. If you add a person who has never used an Intralinks service, the person will be added to Intralinks' master directory of users, called the Global User Directory.

When adding a new user to an Intralinks exchange, you need to define five primary fields – First Name, Last Name, Email Address, Phone and Organization. You also should set the user's role in the exchange; **Reviewer** is selected by default.

Using SharePoint, you can remove individual users from your Intralinks exchange. You also can remove exchange members when deleting a group. The members will be removed from the Intralinks exchange, but not from the Intralinks Global User Directory.
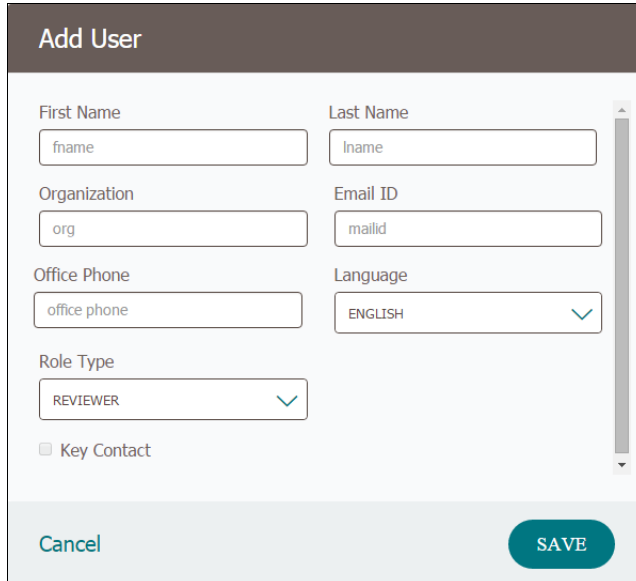
Note that any changes you make to user accounts are made immediately in Intralinks. These changes are not included in the sync process.

Adding a user to your Intralinks exchange

▶ **To add a new user to your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ▤ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Users**. The **Users** screen appears.

3. Click **Add User**. The **Add User** screen appears.

4. Enter the new user's name, the organization the person is associated with, the person's phone number and email address.

5. If you know that the person prefers to use a language other than U.S. English, select the language from the **Language** list.

6. Use the **Role Type** list to select an exchange role for the person. The roles that are available in the list reflect the roles that are available in the exchange, and the list may vary from one exchange to another.

7. If the person will act as a key contact for the exchange, mark the **Key Contact** option.

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

   Users can be key contacts only if they have one of the following exchange roles: Manager Plus, Manager, Manager Limited, Publisher Plus or Reviewer Plus.

8. Click **Save**.
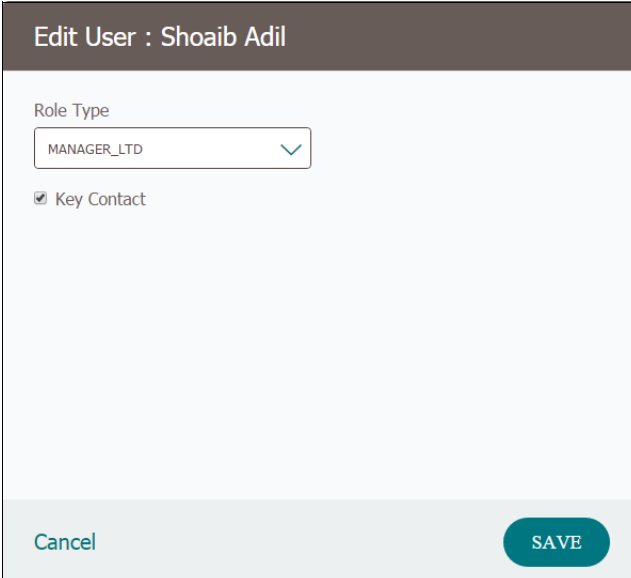
Changing a user's role in your Intralinks exchange

Once a person has been added to Intralinks' Global User Directory, you cannot change any information on the person's user profile. You can change the person's role in your Intralinks exchange, however, and depending upon the role selected, you may be able to make the person a key contact for the exchange.

▶ **To change a user's role on your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ☰ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Users**. The **Users** screen appears.

3. Locate the person's name and click the pencil icon 🖉 that appears in the **Actions** column next to the name. The **Edit User** screen appears.

4. Use the **Role Type** list to select an exchange role for the person. The roles that are available in the list reflect the roles that are available in the exchange, and the list may vary from one exchange to another.

5. If the person will act as a key contact for the exchange, mark the **Key Contact** option.

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

   Users can be key contacts only if they have one of the following exchange roles: Manager Plus, Manager, Manager Limited, Publisher Plus or Reviewer Plus.

6. Click **Save**.

Removing users from Intralinks exchanges

Use the steps below to remove individual users from an exchange.

If you wish to remove a group and all of the group members, see **"Deleting Intralinks groups" on page 54**.

▶ **To remove a user from your Intralinks exchange**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon ☰ in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Users**. The **Users** screen appears, listing existing exchange members.

3. To remove a particular person, click the trash can icon 🗑 that appears in the **Actions** column next to that person's name. A message appears asking you to confirm your choice.

4. Click **Confirm** to remove the person from the exchange.

The exchange will no longer appear when the person logs into Intralinks, and the person's credentials cannot be used to log into the exchange from the Intralinks Connector for SharePoint.

SharePoint lists created by the Intralinks Connector

The Intralinks Connector creates and uses the following SharePoint lists:

Site Assets

The Site Assets library is used to manage resources required to editing and viewing the properties pages for documents. If the document library does not exist, it will be created by the Intralinks Connector.

Important! Do not delete this library.

ILReports

The ILReports document library is used to manage all reconciliation reports. If this library is deleted, you will lose access to all existing reconciliation reports, and the Intralinks Connector will create a new ILReports library for future reports.

Chapter 5: Troubleshooting

This chapter describes issues that you may encounter while using the Intralinks Connector for SharePoint, and what you can do to resolve them.

If you cannot find an answer to your question here, contact your Intralinks Connector administrator. Be prepared to provide the administrator with a copy of the Sync Log for the site where the issue occurred. The Sync Log contains error IDs that will enable the administrator to more quickly pinpoint the source of the problem that you are experiencing. For information about viewing and exporting the Sync Log, see **"Viewing the sync status for a linked library and Intralinks exchange" on page 26** and **"Exporting the sync log" on page 27**.

A document exists on SharePoint but not on the Intralinks exchange

Check for the following issues:

- Is the document in a folder within a SharePoint library that is synchronized to an Intralinks exchange?

- Are there required custom fields for the document that need to be uploaded to Intralinks?

- Is the document checked out?

- Is the folder or any of its parent's folders offline?

- Have you set up one-way synchronization from your Intralinks exchange to your SharePoint Document Library?

You can update the Intralinks exchange using the following steps.

▶ **To perform an incremental sync**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Site Synchronization Settings**. The **Site Synchronization Settings** screen appears.

3. Click **Sync**. The **Sync** screen appears.

4. Indicate how conflicts should be handled. (Conflicts occur when a file has been changed on both the SharePoint library and the Intralinks exchange since the last sync was performed.) Choose which file will be retained when conflicts arise: the file with the latest modified date, the file in SharePoint, or the file in Intralinks.

   In cases where a conflict arises because a file was deleted in one location and updated in the other, you can prevent the file from being removed from both locations by marking the **Do not delete if conflict arises** option. If you mark this option, the updated version will remain untouched.

5. If you are syncing documents and folders, indicate the content that you want to sync:

   New — Files that have been added since the last sync will be synced.

Failed — Files that failed to sync previously will be selected for syncing. (If the problems that prevented them from being synced previously were not fixed, the files may continue to fail syncing.)

Skipped — Files that could not be synced previously because of a minor problem will be selected for syncing. (If the problems that prevented them from being synced previously were not fixed, the files may continue to be skipped.)

6. Mark either the **Last Sync Date** option or the **Set Time Frame** option. If you select **Set Time Frame**, select a point of time within the past 7 days. All of the items that meet the criteria that you've specified and that have been added, changed or deleted since the selected date and time will be synced.

   Do not mark the **Initial Sync** option.

7. When you have made all of your selections, click **Sync**.

A progress bar appears showing both a visual indicator of syncing progress and a counter that displays the number of files that have been synced and the total number of files that are selected for syncing.

A document exists on the Intralinks exchange but not on SharePoint

Check for the following issues:

- Is the associated folder in the SharePoint library marked as offline?

- Is the document checked out?

- Is the document in another library than the one synchronized with your Intralinks exchange?

- Have you set up one-way synchronization from your SharePoint document library to your Intralinks exchange?

After you have located the problem and fixed it, perform an incremental sync.

▶ **To perform an incremental sync**

The Intralinks Connector for SharePoint should be displayed.

1. Click the navigation icon in the menu bar on the left side of the screen. A panel slides out, displaying alert settings options.

2. Select **Site Synchronization Settings**. The **Site Synchronization Settings** screen appears.

3. Click **Sync**.The **Sync** screen appears.

4. Select the information that you want to sync. You can sync documents and folders, custom fields and their values, or both.

5. Indicate how conflicts should be handled. (Conflicts occur when a file has been changed on both the SharePoint library and the Intralinks exchange since the last sync was performed.) Choose which file will be retained when conflicts arise: the file with the latest modified date, the file in SharePoint, or the file in Intralinks.

   In cases where a conflict arises because a file was deleted in one location and updated in the other, you can prevent the file from being removed from

both locations by marking the **Do not delete if conflict arises** option. If you mark this option, the updated version will remain untouched.

6. If you are syncing documents and folders, indicate the content that you want to sync:

   New — Files that have been added since the last sync will be synced.

   Failed — Files that failed to sync previously will be selected for syncing. (If the problems that prevented them from being synced previously were not fixed, the files may continue to fail syncing.)

   Skipped — Files that could not be synced previously because of a minor problem will be selected for syncing. (If the problems that prevented them from being synced previously were not fixed, the files may continue to be skipped.)

7. Mark either the **Last Sync Date** option or the **Set Time Frame** option. If you select **Set Time Frame**, select a point of time within the past 7 days. All of the items that meet the criteria that you've specified and that have been added, changed or deleted since the selected date and time will be synced.

   Do not mark the **Initial Sync** option.

8. When you have made all of your selections, click **Sync**.

A progress bar appears showing both a visual indicator of syncing progress and a counter that displays the number of files that have been synced and the total number of files that are selected for syncing.

The number of characters in the filename/folder path exceeds the maximum limitation for SharePoint

The Intralinks Platform supports deep folder structures but the file may fail to upload to SharePoint if the total URL exceeds 260 characters and 128 characters for a single file/folder name.

If a failure occurs because the SharePoint character limitation has been exceeded, a "Skipped" message is displayed in the sync log. These messages are logged with every full synchronization until the issue is resolved.

To fix the problem that arises from the SharePoint character limitation, you can reduce the depth of the file/folder path. Be aware that if the file/folder path is near 260 characters, a long file name may cause it to exceed the limit. Also, the file name itself cannot exceed 128 characters.

Custom fields appear in the Intralinks exchange but not in SharePoint

Check for the following issue:

- Have the custom fields been published in the exchange?

Users appear in the Intralinks exchange but not in SharePoint

Check for the following issue:

- Are the users active in Intralinks? (Some user roles are inactive when exchanges are in the hold and preparation phases. All roles are active in the open phase.)

Intralinks document permissions aren't applied to SharePoint users

Intralinks document permissions apply only to users accessing these documents through Intralinks.

SharePoint has its own set of permissions that you can apply to protect the documents from your SharePoint users.

See **"Working with permissions" on page 47** for more information.

I can't find Intralinks users in the SharePoint users list

User and group information can be updated directly in your Intralinks exchange using the Intralinks Connector. Your SharePoint site is not affected by these updates, and the names of the Intralinks users do not appear in SharePoint.

For more information, see **"Working with groups" on page 52** and **"Working with users" on page 55**.

My credentials are valid but I can't log in

If you have a Shared User Account (you are using the same account for more than one site), ensure that concurrent logins are enabled on the Intralinks Platform.

Understanding Failed and Skipped statuses

During syncing, items may fail syncing or be skipped. The following lists describe the reasons why items fail or are skipped.

Items will be *skipped* in the following situations:

- A file is checked out in Intralinks by another user with the Manager Plus role and then updated in SharePoint.

- A file is checked out in SharePoint and then updated in Intralinks by another user with the Manager Plus role.

- Files that are added, updated or deleted in SharePoint are located in folders that are marked as offline.

- Files that are added, updated or deleted in Intralinks are located in folders that are marked as offline in SharePoint.

- Root folders in Intralinks are given the same name, but with different capitalization (for example, *documents* and *Documents*. One of the folders will be skipped.

Items will be *fail* in the following situations:

- The proxy server goes down during a download.

- Files in Intralinks do not have required custom field values.

- Files added in Intralinks have names with more than 128 characters.

- Files or folders added in Intralinks have URL paths with more than 260 characters.

- Placeholders or other files added in Intralinks are 0 bytes in size.

- Files added in Intralinks exceed the maximum size allowed in the site configuration settings.

- Files added in Intralinks have extensions that are not supported by SharePoint, as specified in the configuration settings.

- Folders added in SharePoint have names with more than 60 characters.

- Files or folders added in Intralinks have names that include symbol characters that are not supported by SharePoint.

- Files added in SharePoint are located in folders that are skipped during syncing.

- Unprotected files are added to protected folders in Intralinks, preventing IRM protection from being applied to the files.

- PDF and Microsoft Office files are located on an Intralinks exchange for which the Intralinks Viewer online document viewer is enabled.

- Files in Intralinks have a content length of 0 bytes.

In some cases, the sync process can fail altogether before any content is synced. This can happen in the following circumstances:

- Proxy settings are configured incorrectly, preventing the Intralinks Connector from establishing a connection to the Intralinks API. To prevent this, ensure that the proxy server is configured correctly and is accessible.

- The token for a connected user account has expired. In this case, disconnect and reconnect using the user account's credentials.

- A connected user is removed from the Intralinks exchange. In this case, re-add the user to the exchange.

- A connected exchange or SharePoint library is deleted. In this case, the deleted exchange or library must be recreated and then remapped using the Configuration Settings screen.

If a sync process fails altogether, you can determine the reason by displaying the Intralinks Connector administrator dashboard and placing the mouse pointer over the Failed status.

Appendix A: Comparison of the Intralinks Connector for SharePoint versions 3.x and 4.x

This appendix provides a brief summary of functionality that is new in the Intralinks Connector for SharePoint 4.x, as well as functionality that has been enhanced or removed since the previous version.

New features

The following features are new in version 4.x of the Intralinks Connector for SharePoint.

Sync monitoring

My Connected Dashboard This dashboard presents a view of all connected sites that a single user owns. This is helpful for site administrators who own more than one site.

Progress bar When syncing is underway, a progress bar now provides a visual indication of the items being synced.

Sync Log A new log provides insight into the status of items being synced.

Excluded items After items fail or are skipped three times during syncing, they are marked as ignored. They will be identified as excluded items on the Sync Log.

Connector administration

Connector Administration portal All settings, such as SMTP settings and Halt Sync, that were previously configured from Central Administration have been moved to a separate web application.

Syncing

Conflict resolution when files are changed in both locations Users can control how conflicts are managed when a file is changed in both locations. Users can choose to use the file located in SharePoint, the file located in Intralinks, or the file with the latest modified date. No files are duplicated.

Conflict resolution when files and folders with the same name are added in both locations If a file or folder with an identical name is added to the same location in both SharePoint and Intralinks, the conflict resolution option that was selected before syncing will be applied. No files are duplicated.

Duplicate files In version 3.5, files are duplicated within Intralinks if a document with the same name already exists. In version 4.x, if a document with the same name exists, the document is replaced and not duplicated.

Sync notifications

Sync success alert subscriptions Users now have the option to receive alerts whenever a sync is successfully completed.

Multi Tenancy

Version 4.2 and later supports the connection of multiple SharePoint farms to a single Intralinks Connector Windows server, and does *not* require any new servers. This makes it easier to set up new SharePoint farms to work with existing Intralinks Connectors.

Enhanced functionality

The following features existed in version 3.5 of the Intralinks Connector and have been enhanced in version 4.x.

Reconciliation

Reconciliation Report scheduling The Reconciliation Report now can be scheduled for a future date and time. Reports can be generated using the following new options: *Later in the Day*, *Daily* and *Weekly*. You can continue to generate the Reconciliation Report immediately, as well.

Expanded information on Reconciliation Reports The Reconciliation Report has been expanded to include additional fields, including file type and file size.

Support for advanced folder mapping and offline folder settings The Reconciliation Report no longer show files and folders that are not scheduled for syncing based on mapping settings.

Support for advanced folder mapping and offline folder settings The Reconciliation Report no longer show files and folders that are not scheduled for syncing based on mapping settings.

User groups and permissions

Accessing users and groups In Intralinks Connector version 4.x users and groups can no longer be synced to SharePoint lists. Instead, information is called directly from Intralinks when it is displayed in the Connector.

Permissions When permissions are set for folders and documents in SharePoint, those changes are made immediately in Intralinks using an API. Permissions no longer need to be synced.

Syncing

Syncing of custom fields Custom fields will be synced from Intralinks to SharePoint document libraries during both initial syncs and incremental syncs. In previous versions, custom fields were synced only during initial syncs.

Checked-out files You now have the ability to skip files that have been checked out in either SharePoint or Intralinks. This ensures that files that have been checked out and are being updated are not overwritten.

Files with extensions not supported by SharePoint You now have the ability to skip files with extensions that are blocked in SharePoint. The list of extensions that are blocked can be configured.

Syncing of metadata only In Intralinks Connector version 4.x, if the metadata associated with a document has changed but the contents of the document have not, only the metadata will be updated. Previously the entire file was downloaded when metadata changed.

Data integrity If documents fail to be downloaded for any reason, a data integrity check will mark the documents as *Failed*, and syncing of the documents will be attempted in the next three sync cycles. (The data integrity check is not performed on protected documents.)

Extensions for protected files In version 3.5 of the Intralinks Connector, the extension for protected files was changed to ._p when they were downloaded. In version 4.x, the extensions no longer are changed.

Sync priority

In version 3.5 of the Intralinks Connector, syncs were performed in the following order: full syncs, manual syncs, scheduled syncs. In version 4.x, top priority has been give to manual syncs, and so the sync order now is manual sync, initial (full) sync, scheduled sync.

Sync configuration

Access to exchanges Intralinks Connector version 4.x ensures that users will be able to connect SharePoint sites only to Intralinks exchanges on which they have the Manager Plus exchange role.

Deregistering Deregistering now removes the connection between a SharePoint site and an Intralinks exchange and also removes all components added in SharePoint by the Connector, including context menus and document library columns.

Sync monitoring

Sync status In Intralinks Connector version 4.x, the status for a sync cycle is set to *Failed* if even one file cannot be synced. In the previous version, a sync cycle was set to *Failed* only if a problem (such as a network connection failure) prevented the entire sync sessions from occurring.

View Properties context menu The parent-child relationship between custom fields now is reflected in the View Properties menu in SharePoint. They continue to be reflected on the Edit Properties page, as well.

Sync administration

Configurable device IDs Device IDs are used by Intralinks to associate requests with specific devices, reducing issues related to user sessions and tokens. In version 3.5 of the Intralinks Connector, the farm ID was used as the device ID. In version 4.x, the device ID can be configured in the administrator portal.

Connector administration

Configuration management Settings that were located in configuration files, such as timerjob.config, have been centralized in the Intralinks Connector administrator portal. Server-specific settings, such as the number of process that can be run simultaneously and a nickname for the server, can be configured.

Functionality that is no longer supported

The following features existed in version 3.5 of the Intralinks Connector and have been removed in version 4.x.

Syncing

View-based syncing Support for view-based syncing has been removed.

Manual sync options The ability to select a single SharePoint list item or to select items based on their metadata for syncing has been removed.

Deletion of mapped entities If a mapped SharePoint document library or a mapped Intralinks exchange or folder is deleted by a user, it is no longer re-created during syncing, and the sync will fail.

Sync configuration

SharePoint library creation The ability to create a SharePoint library while performing advanced folder mapping has been removed.

Appendix B: Site configuration settings

The table below shows the configuration settings that can be modified by Intralinks Connector administrators using the **Site Configuration Settings** screen. Note that the default values may be different than the values displayed on your screen if changes were made to the value in the past

Important! *Do not* change values for Intralinks Platform. Intralinks settings cannot be changed; they are provided in the Intralinks Connector as a means for improving the Connector's performance.

Configuration settings

Key	Default value	Description
DOMAIN_NAME		Enter the domain name where the user accounts are created.
AD_GROUP_NAME		Enter the Active Directory group that contains the names of Intralinks Connector administrators.
SERVICE_ACCOUNT		Service account that will be assigned permissions on the connected SharePoint site.
SENDER_EMAIL_ADDRESS	support@intralinks.com	The address that appears in the From: field for all email alerts.
LOG_LEVEL	Error	NLog minimum level. Enter one of these values: Off, Fatal, Error, Warn, Info, Debug, Trace.
ENABLE_LOG_CLEANUP	true	Setting this to true will ensure the logs are permanently deleted periodically. Set the value to false to manually manage log cleanup.
LOG_TIME_INTERVAL	30	Time interval for log cleanup to be performed (in days). For example, setting this value to 30 will ensure the logs are cleaned up every 30 days.
LOG_TIMING	02:00	The time of day that cleanup is to be performed. The default value is 2 a.m.
SIZE_VERIFICATION_EN-ABLED	true	Enable size verification.
DEVICEID		Ensure this ID is unique for each environment. A unique device ID ensures that user sessions/tokens are managed separately for each device.

Key	Default value	Description
CLIENT_ID		GUID that is generated during the app registration process. The value must be unique for each add-in, and must be lowercase.
ISSUER_ID		The access token must be issued by a token issuer that SharePoint trusts. In a high-trust SharePoint add-in, the certificate is the token issuer. The value must be lowercase.
CLIENT_SECRET		SharePoint client secret.
CLIENT_SIGNING_CERT_SE-RIAL_NUMBER		SharePoint certificate serial number.
PASSWORD_RE-SET_SCHEDULED_HOUR	2	Time of day when the password job will start (hours).
PASSWORD_RE-SET_SCHEDULED_MINUTE	0	Time of day when the password job will start (minutes).
ITEM_MAPPING_RETRIED	3	Enter the number of times items are failed or skipped before being excluded.
RECONCILIATION_RE-PORT_THREADS_LIMIT	3	Number of Reconciliation Reports that can be generated simultaneously.
PAGE_SIZE	20	Number of records that will be displayed on each page.
SYNC_LOG_PAGE_SIZE	100	Number of records that will be displayed on each page of the Sync Log.
PROGRESSBAR_DISPLAY	true	Determines whether a progress bar is displayed when syncing is performed. Set to false to hide the progress bar.
REPLACE_SPECIALCHARAC-TERS	false	Certain special characters in files names will be retained as they are. Set the value to false to replace these characters with underscores.
DISPLAY_INTRALINKS_ID	false	Set this option to true to display Intralinks IDs for folders and files in the mapped document library.

Appendix C: Intralinks Connector for SharePoint Best Practices

SharePoint Document Library limitations

Item	Recommendation
Maximum number of documents*	2,000
Maximum number of top-level folders*	200
Maximum number of folders*	2,000
Maximum number of libraries that can be synced	200 (using Advanced Folder Mapping)

* Figures are based on Intralinks exchange limits.

Single synchronization job limits

Item	Recommendation
Maximum number of documents per Intralinks exchange and SharePoint Document Library	2,000
Maximum number of folders per Intralinks exchange and SharePoint Document Library	2,000
Maximum number of custom fields per Intralinks exchange and SharePoint Document Library	40 per item
Maximum number of groups per Intralinks exchange and SharePoint Document Library	2,500
Maximum number of users per Intralinks exchange and SharePoint Document Library synchronization	5,000
Maximum concurrent SharePoint site collections actively connected to an Intralinks exchange	1
Maximum SharePoint Document Library size per Intralinks exchange	20 GB
Estimated time for 1GB of data	1 hour

Sites and Site Collections

Item	Recommendation
Recommended number of sites	1,000
Maximum number of sites recommended under designated site collections (200-site collections)	200
Recommended maximum under one site collection where total inactive site collections is 160.	Up to 400

Item	Recommendation
Total number of site collections supported and recommended number for best performance.	500/200
Recommended maximum sites hosted under a single site collection	150
Recommended maximum for simultaneous synchronization	9 sites (2.5K document/exchange or site x 9 = 5GB)
Empty site connections	Have been tested for synchronization interval of 5 minutes.

Sync

Item	Recommendation
Site sync concurrency	Maximum of 5 concurrent syncs per server*
FPRPC threshold	20MB (files larger than 20MB will be processed by FPRPC)
File chunking threshold	100MB (files larger than 100MB will be processed using Intralinks Platform's chunking API)
File chunking size	2MB (files that are subject to chunking will be processed in 2MB chunks)
Sync log display threshold	100 items per page using pagination
Intralinks Platform user display threshold	20 items per page using pagination

* Clients who wish to process more than five sync sessions in parallel are advised to add additional Intralinks Connector application servers.