Intralinks Dealmanager™ Version 2.2M5

Startup Guide for Editors and Viewers

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Welcome to Intralinks Dealmanager™

Intralinks Dealmanager offers a comprehensive, secure solution for managing the Corporate Development deal pipeline, due diligence activities and other phases of the buy side deal lifecycle. Administrators can create custom fields to capture data critical to their organization's evaluation process. Administrators and Workspace owners can add deal documents and invite editors and viewers to review them; tasks can be used to manage and monitor the due diligence process. Sellers' Intralinks Platform exchanges can be linked to deals, further streamlining the evaluation process.

Read this guide to get acquainted with the key tasks that you can perform with Intralinks Dealmanager.

Important! Intralinks gives Intralinks Dealmanager administrators the flexibility to determine how the users in their organizations can use Intralinks Dealmanager. Depending upon the policies set by your organization's Intralinks Dealmanager administrators, some of the functions described in this guide may not be available to you.

Getting started

Requirements: In order to use Intralinks Dealmanager, you must have one of the following browsers:

- Google Chrome (latest version, automatically installed by Google if you use Chrome)
- Firefox (latest version)
- Safari 6.1 or later (Macintosh only)
- Microsoft Internet Explorer 8 or later

For an optimal viewing experience, we recommend that you use Chrome or Firefox on Windows, and Chrome, Firefox or Safari on Macintosh. In order to drag and drop files, you must use a browser that supports HTML5; dragging and dropping doesn't work internet Explorer 8 or 9.

In order to view downloaded IRM-protected documents, you must have Adobe Reader® 10 or greater.

Starting Intralinks Dealmanager

Point your browser to: https://via.intralinks.com/Dealmanager/index.html?appType=dealManager

The Intralinks Dealmanager login screen appears.

Logging in

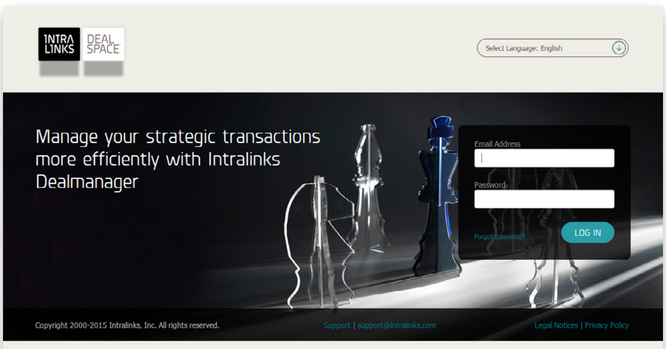
The **Login** screen should be displayed.

You can view Intralinks Dealmanager in one of the following languages. Make your selection from the list in the upper right corner of the screen.

- **English** (US English)
- **English** (UK)
- **Deutsch** (German)
- **Français** (French)
- **Português** (Brasil) (Brazilian Portuguese)
- **Español** (Spanish)
- 日本語 (Japanese)
- 简体中文 (Simplified Chinese)

Dates will be displayed in the format used in these locales, as well.

If you select the **English (UK)** option, dates will be reformatted in the day/month/year format preferred in the



The login screen.

United Kingdom and elsewhere, but the text that appears on the screen will be displayed in US English.

If your organization uses Single Sign-On (SSO): If your organization uses Intralinks' Single Sign-On (SSO) functionality, you will have the option to log in through your corporate network, rather than Intralinks, when you display the Intralinks login page. If you are already logged into the corporate network, Intralinks Dealmanager will be displayed automatically when you point your browser to:

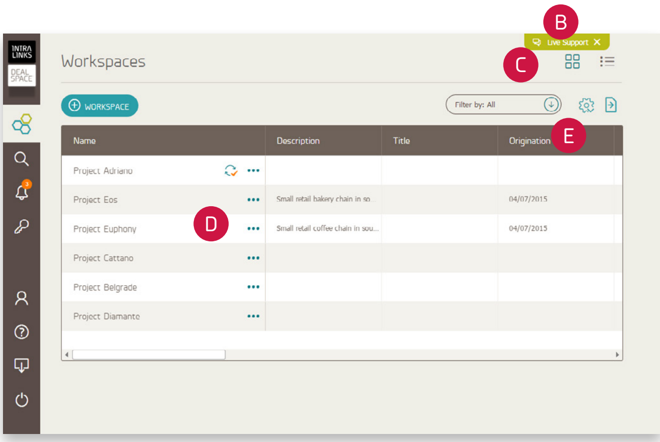
https://via.intralinks.com/Dealmanager/index.html?appType=dealManager

Step 1. Enter your email address and password.

Step 2. Click Log in A. The Pipeline view appears, displaying all your deals.

You can update your password and other personal information at any time. For more information, see "Your user profile" on page 7.

Also note the **Live Support** link B at the top of the screen. If you encounter problems using Intralinks Dealmanager, click this link to start a chat session with an Intralinks client support specialist — we're here to help. For more information, see "Getting help with Intralinks Dealmanager" on page 10.



*The Pipeline view of the **Workspaces** screen.*

Using the Pipeline and Card views

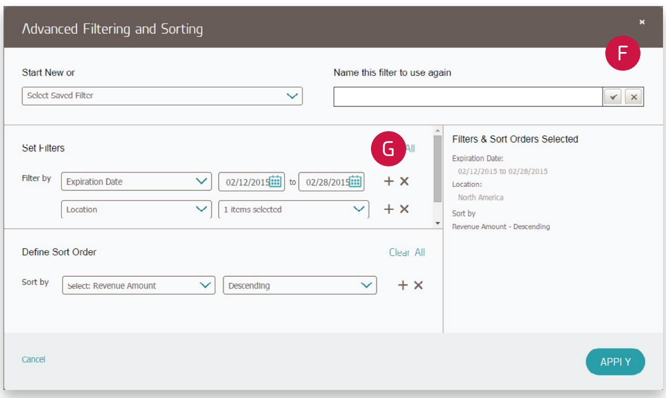
The Pipeline view shows a snapshot of each of the deals that you are involved in. The details that you and other deal team members have entered about each deal is displayed, allowing you to compare deals at a glance. Use the scroll bar at the bottom of the deal list to view more information.

You also can view your deals in a card format. To switch between the Pipeline view and the Card view, click the card and pipeline icons C.In either view, click the ellipsis icon D next to a deal's name to see additional options that you can apply to the deal. These include pinning the deal to a workboard, seeing general information about the Workspace, removing yourself from the deal. and marking the deal as a favorite. All of these options are described in later sections of this guide.

To see more information about a deal, click on its name. The Workspace used to manage the deal is displayed. Workspaces are the collaboration areas that are created for each deal. Using the Workspace, you can edit deal information, add files and make comments on them, and create and monitor tasks assigned to you and other members of the deal team.

Sorting and filtering deal information

You can sort the deal list by clicking on any column heading in the Pipeline view. To filter the deal list or to sort the list using multiple columns, click on the gear icon E and select **Advanced Filters** from the menu. The **Advanced Filtering and Sorting** screen appears.You can create a new filter or select a filter that you saved previously. To save a new or



*The **Advanced Filtering and Sorting** screen.*

modified filter, enter a name for it in the **Name this filter to use again** field, then click the check mark icon F. You do not need to save filters that you do not plan to use again.
To apply a filter, select a column from the **Filter by** field. Depending upon the column you select, one or more fields will appear, allowing you to specify the range of information that will be displayed.

To apply an additional filter, click the plus sign icon G. You also can set one or more sorting options. Select a column from the **Sort by** field, and then choose the column that will be used for sorting. To apply an additional filter, click the plus sign "icon I. If you apply multiple sorting options, they will be applied in the order that they appear here. For example, if Region appears as the first sorting option and Revenue appears below it, all of the deals for each region will be grouped together and within each group the deals will be sorted by revenue amount.

Exporting information in the Pipeline view

You can export the information that is currently displayed in the Pipeline view to Microsoft Excel, where you can manipulate the data further or prepare reports for your corporate leadership. To export Pipeline information, click the export icon in the upper right corner of the screen.

Removing filtering and sorting options

To remove all filters and sorting options in the Pipeline view, click on the gear icon E and select Reset from the menu.

Opening a Workspace

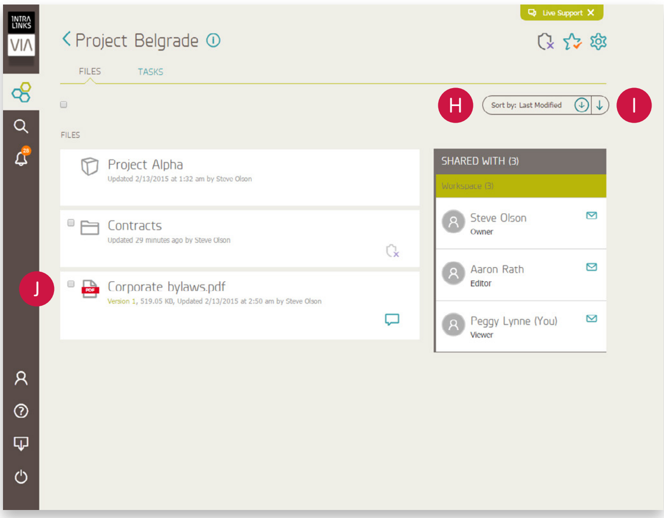
Either the **Pipeline** view or the **Cards** view of the **Workspaces** screen should be displayed. If it is not, click the Workspaces icon in the navigation bar on the left side of the screen and select **Workspaces** from the menu that appears.

Step 1. Locate the Workspace that you want to view.

When you open the **Workspaces** view, all your Workspaces are displayed. To view a smaller list, you can select one of the options from **Filter by** list:

- **All** - These are all of the Workspaces that you have created or for which you have been assigned the owner role.
- **Owned** - These are the Workspaces that you have created or for which you have been assigned the owner role.
- **Shared with you** - These are Workspaces created by other people; you have been invited to take part in them. All of the Workspaces in this view are active.
- **Favorites** - These are Workspaces that you have marked as favorites. To learn how to mark Workspaces as favorites, see "Marking Workspaces as favorites" on page 7.

If the Pipeline view is displayed, you also can use advanced filtering and sorting options filter by deal-specific details, such as asset valuation or region. You can apply multiple filtering and sorting options if you like. To learn more about advanced filtering and sorting options, see "Sorting and filtering deal information" on page 2



The Files view of the Workspace details screen.

If you have pinned the Workspace to a workboard, you can select it from the workboard. (Workboards are organizational tools that you can use to group Workspaces that are related in some way. To learn more about workboards, see “Creating a workboard” on page8.) Click the Workspaces icon in the navigation bar on the left side of the screen, then select the workboard you want.

You also can sort your Workspaces using options in the Sort by menu. You can sort the list by the date you last modified the Workspace; the name of the person who created the Workspace; or the expiration date. To change the sort order (for example, from the oldest date first to the newest date first), click the arrow icon that appears to the right of the **Sort by** list.

Step 2. Click on the Workspace. It will open, displaying more details about it.

You can sort the contents of your Workspace a number of ways. Select a sorting option from the **Sort by** list H. To change the order in which the contents are sorted, click the arrow icon I to the right of the **Sort by** list. For example, if the list is sorted by the documents’ modified date, clicking the icon will change the order of the list from oldest to newest, or vice versa.

Viewing and downloading files

You can view any files attached to your Workspaces. If IRM protection has been applied to the Workspace or folder, you can view and download PDF and Microsoft Office files, but you will have to enter your email address and password to open downloaded copies. Intralinks Dealmanager uses Intralinks’ plugin-free IRM technology; no plugins are required to view protected files.

The Workspace that contains the files that you want to view or download should be open.

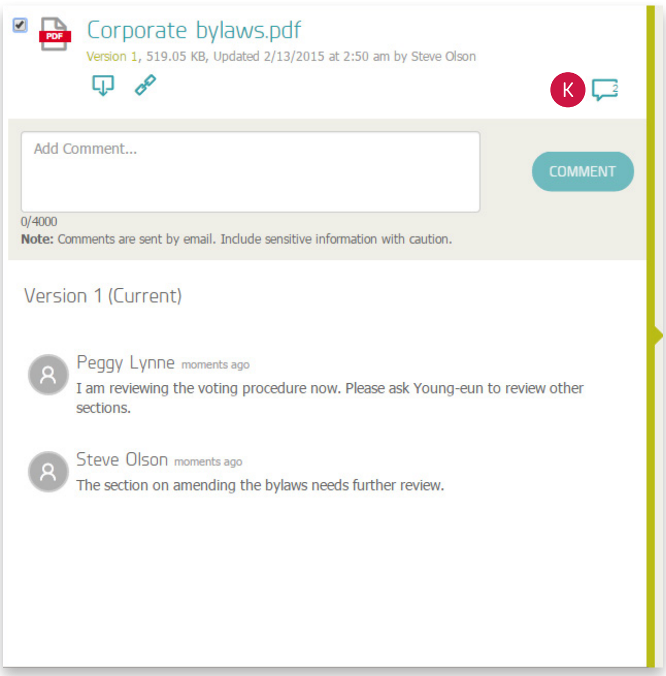
- To download multiple files, click the box that appears to the left of each file. A Download icon will appear at the top of the screen; click it. If previous versions of the files exist, only the current version will be downloaded.
- To view an individual file, click the file’s name J. PDF and Microsoft Office files will be displayed in the Microsoft Office Web App, a secure Web-based file viewer. You also can view graphics files in JPEG, PNG and BMP formats online. Other types of files will be downloaded.
- To download an individual file, place the mouse over the file. A number of icons appear below the file’s name. Click the Download icon . It appears first in the row of icons.

Commenting on files

You can add comments about files and view the comments made by others. The Comment icon K indicates the number of comments that have been added for each file. Click this icon to view or hide comments, or to add your own comment.

To add a comment, type the comment and click **Comment**.

Comments can be up to 4,000 characters long.



Comments about a file.

Adding and assigning tasks

You can use tasks to manage the work that will be done by the deal team. You can use tasks to communicate your needs to other members of the deal team. For example, you can create a task for a Workspace owner to request additional information needed for your review.

Adding a single task

The **Tasks** tab should be displayed.

Step 1. Click the **Task** button, and select **New Task** from the menu that appears. The **Add Task** screen is displayed.

Step 2. Enter a name for the task.

If you are creating a placeholder task and are not ready to assign it to a deal team member, you can skip the rest of the fields on the screen.

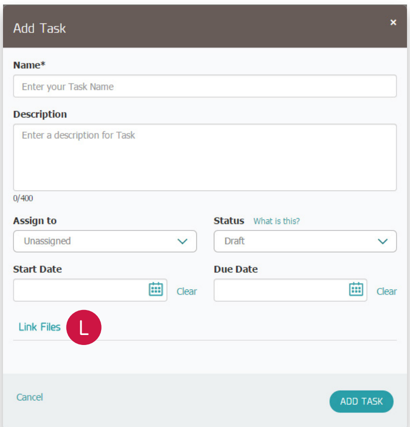
When you are ready to assign the task, simply edit the task and assign it. The person assigned the task will be alerted when you save your changes.

Step 3. (Optional.) Enter a description of the task. This could be a note to the assignee providing details about what is required.

Step 4. Assign the task to a deal team member and enter the start date and the expected completion date.

Step 5. (Optional.) Link files to the task. Click the **Link Files** link L to display a screen that will allow you to select the files associated with the task. When you have selected the files you want, click the **Link Files** button to return to the **Add Task** screen.

Step 6. Click **Add Task**. The task will be created. If you assigned the task to a deal team member, that person will receive an email alert with information about the task.



*The **Add Task** screen.*

Importing multiple tasks

You can import many tasks at once and assign them to deal team members later. The tasks will remain in Draft status until they are assigned to a person.

The **Tasks** tab should be displayed.

Step 1. Click the **Task** button, and select **Import** from the menu that appears. The **Import Tasks File** screen is displayed.

Step 2. Click the Download button to download a template that you can use to identify the tasks that will be added.

Step 3. Complete the template.

As you add tasks to the template, keep the following issues in mind:

- Do not change the order of the columns in the file:
  - Task Name
  - Description
  - Start Date
  - Due Date
- The first row of the template is reserved for column headers. Do not enter data in this row.
- An entry is required in the Task Name column. All other columns are optional.

- Descriptions must be 400 characters or less.
- Dates should be entered using the MM/DD/YYYY format.
- The file must be saved in .CSV format.

Step 4. When your template is complete, click the **Browse** button. A dialog box will appear allowing you to select the completed template.

Step 5. Click **Import**.

Reassigning tasks and assigning draft tasks

To assign a draft task or to reassign a task from one person to another, highlight it in the tasks list. Information about the task appear in the **Details** panel H. Click the **Edit** link at the top of the **Details** panel, then select a deal team member in the **Assign** to field. Make any additional changes that are needed.

When you click **Save**, your changes will be saved and an email alert will be sent to the assignee to alert him or her about the task.

Completing a task that is assigned to you

The **Tasks** tab should be displayed.

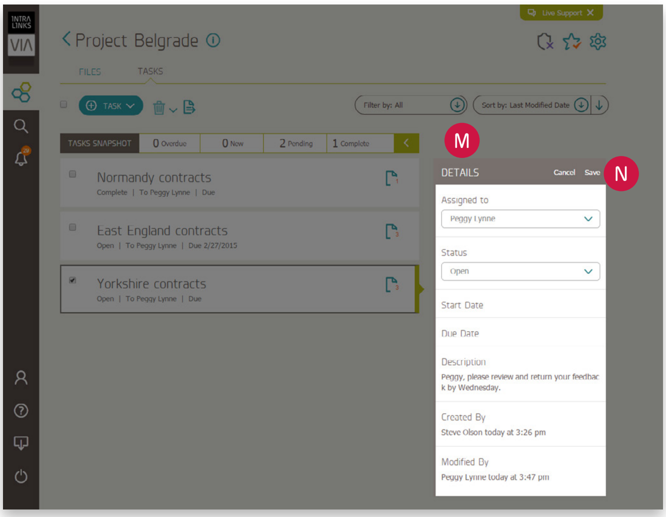
Step 1. Click on the task to select it. Information about the task appears in the **Details** panel M.

Step 2. Click the **Edit** link at the top of the **Details** panel. Fields that can be modified become editable.

Step 3. Select **Complete** from the **Status** list.

Step 4. Click **Save** N.

An email alert will be sent to the person who assigned the task to alert him or her that the task is complete.



*The Task **Details** panel.*

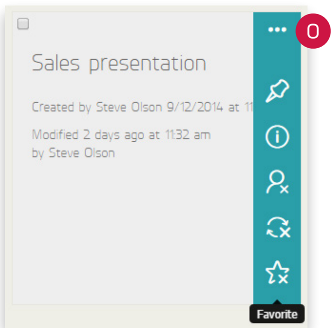
Managing your deal Workspaces

Marking Workspaces as favorites

You can mark Workspaces that are most important or that require the most urgent action. Then when you display the **Workspaces** view, you can use the **Favorites** filter to show only the Workspaces that you have marked as important.

You can mark one or more Workspaces using the **Workspaces** view, or you can mark individual Workspaces while you are viewing them.

In the **Cards** view of the **Workspaces** screen, when you click on the ellipsis icon O in the upper right corner of a Workspace tile, a number of options appear. Click the star icon at the bottom of the list to mark the Workspace as a favorite. If the Pipline view is displayed, the ellipsis icon appears to the right of the Workspace name.



A Workspace tile and the Favorite icon.

If you are viewing an individual Workspace, look for the star icon to the right of the Workspace name. Click the icon to mark the Workspace; a red check mark will appear on the icon.

To unmark a Workspace, click the star icon again. The check mark will be replaced with a gray X, and the Workspace will no longer appear when you use the **Favorites** filter in the **Workspaces** view.

Using workboards to organize Workspaces

If you have many Workspaces, you can use *workboards* to organize them. When you create a new Workspace or are invited to a new Workspace, it will not appear on any workboards, but you can pin it to one or more workboards if you like.

You can use workboards to group Workspaces for related projects or to group your most urgent collaborative efforts, for example.

The workboards are for your use only — no one else will see them — so you can tailor them to meet your needs, and change them as your needs change.

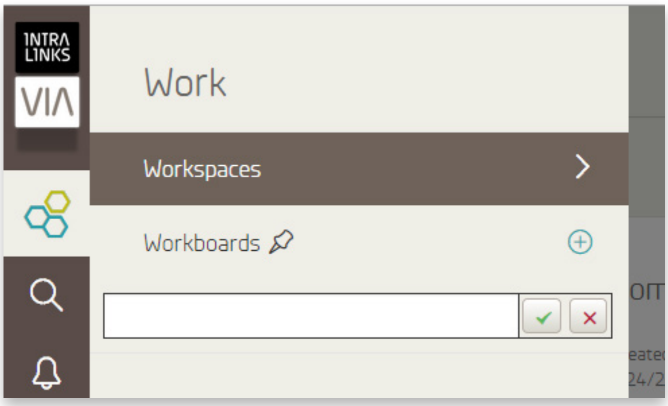
A Workspace can be added to multiple workboards if you like. Workspaces that have been pinned to workboards will continue to appear in the main **Workspaces** view, as well.

Creating a workboard

Step 1. Click on the Workspaces icon in the navigation bar on the left side of the screen. A panel slides out displaying any workboards that you have created already, along with a blank field that you can use to create the new workboard.

Step 2. Enter a name for the new workboard.

Step 3. Click the green check mark icon to the right of the workboard name.



Enter a name and click the check mark icon.

Adding Workspaces to workboards

Once you have created workboards, you can add Workspaces to them.

Step 1. In the **Workspaces** view, click on the ellipsis icon next to the name of the Workspace that you want to add to a workboard. A number of options appear.

Step 2. Click the pin icon. The **Pin to Workboards** screen appears.

Step 3. Click the box next to the workboard (or workboards) where you want this Workspace to appear.

Step 4. Click **OK**.

Once you have pinned Workspaces to workboards, click on the Workspaces icon on the left side of the screen to display a list of workboards. Click on a workboard to see the Workspaces pinned to it.

To view all Workspaces, click the Workspaces icon again and click on the **Workspaces** option at the top of the list.

Searching for files or Workspaces

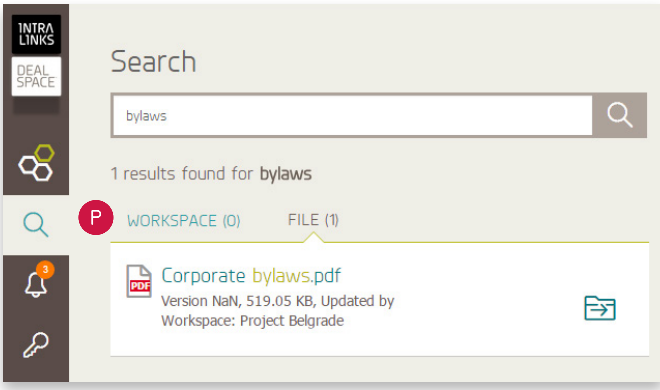
You can use Intralinks Dealmanager's search tool to find files and Workspaces quickly.

Step 1. Click on the Search icon in the navigation bar on the left side of the screen. A panel slides out displaying a search field.

Step 2. Enter a search term and click the icon next to the search field.

In a few moments, search results will appear. Workspaces appear separately from files; click the **Workspace** and **File** headings P to move between the two sets of search results. If the search finds a match within the contents of a file, an excerpt of the contents showing the match is included. When you click on a result, you will be taken to the Workspace where the file is located, and the file will be highlighted briefly.

The results of your search will remain on the search panel. If the file or Workspace that you selected is not the one that you want, click the Search icon again to redisplay the results.

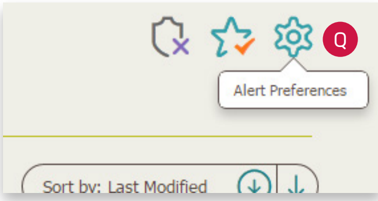


The Search panel, with the results of a search.

Managing email alerts for your Workspace

Intralinks sends you an email alert whenever files are added or updated and new comments are made on files in your Workspace. You can choose whether to receive these emails.

To change the email settings for a Workspace, display the Workspace and click the gear icon Q that appears in the upper right corner of the screen. A menu appears. Click **Alert Preferences**.



*The **Alert Preferences** option.*

You can choose to be alerted when a user makes one of the following changes to the Workspace:

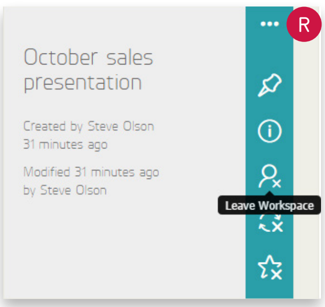
- Files are added to the Workspace. (If you have access to specific folders, you will receive alerts only for the files that you can view.)
- Files that you can view are updated.
- Comments are added for files you can view.

Note: This change affects only the Workspace that you are viewing. If you want to change your email settings for all of your Workspaces at the same time, see "Managing email alerts for Workspaces" on page 9.

Removing yourself from a Workspace

You can remove yourself from a Workspace that you have been invited to if you no longer need access to it and do not plan to contribute to it any longer.

Step 1. Display the **Workspaces** screen and click the ellipsis icon R next to the Workspace that you want to leave. In the Cards view, this icon appears in the upper right corner of the Workspace tile. In the Pipeline view, the elipsis icon appears to the right of the Workspace name. A number of options appear. (The specific options vary depending upon whether you are a viewer, an editor or a Workspace owner.)



A Workspace tile and the Leave Workspace icon.

Step 2. Click the Leave Workspace icon. A message will appear asking you to confirm your choice. You have the option to include a note to the Workspace owner explaining why you are leaving the Workspace.

Step 3. Click **Leave**.

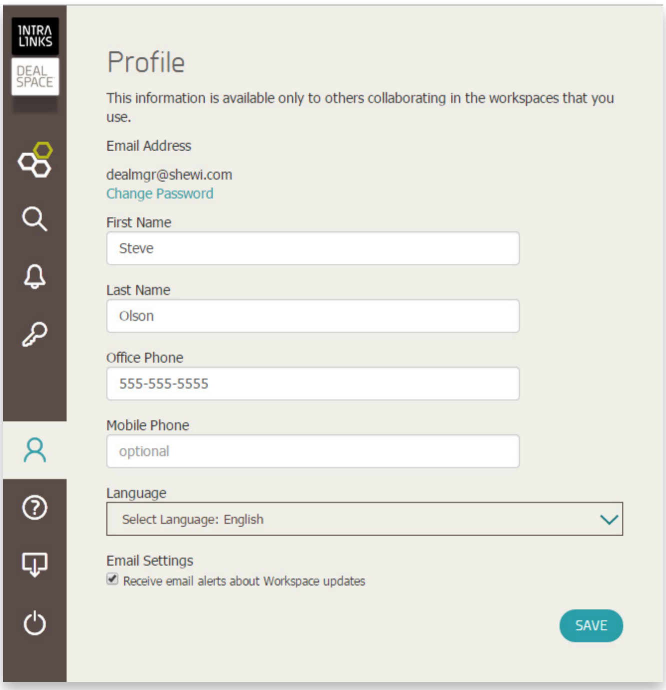
Your user profile

You can view and update your personal information at any time. You can update your name and phone numbers, and create a new password if you like. (You cannot change your email address, though — it is used by Intralinks to identify you.) You also can change the language in which Intralinks Dealmanager is displayed. Email alerts also will appear in the language you select here. In addition, you can use a profile setting to determine whether you will receive email alerts for Workspaces that you create or join.

Viewing and updating your profile

To view your profile, click the Profile icon in the navigation bar on the left side of the screen. Your profile is displayed.

If you want to make any changes, do so and then click **Save**.



The profile pane.

Managing email alerts for Workspaces

If you find that you are receiving more email alerts from Intralinks Dealmanager than you want, you can limit the emails that are sent to you.

You can manage email alerts two ways:

- For each Workspace, you can choose to receive all alerts, selected alerts, or no alerts at all. You can make different selections for each Workspace.
- Using the **Receive email alerts about Workspace updates** option on your profile panel, you can choose whether you will receive alerts for all Workspaces.

If you mark the **Receive email alerts about Workspace updates** option, emails will be sent to you when documents are added or updated and when comments are added. If you don't want to receive these alerts, unmark the option.

If you have marked the **Receive email alerts about Workspace updates** option, you can change the options for individual Workspaces at any time. For more information about managing individual Workspaces, see "Managing email alerts for your Workspace" on page 8.

Be sure to click **Save** after you've made your selection.

Changing your password and challenge question

To change your password, click the **Change Password** link that appears below your email address on the profile pane. The **Change Password and Challenge Question** screen appears. You must enter your current password before entering the new password.

You also can change your challenge question if you like.

The challenge question may be used if you call Intralinks Support and ask for help resetting your password.

Be sure to click **Save** after you have made your entries.

Getting help with Intralinks Dealmanager™

If you have a problem and need help while using Intralinks Dealmanager, you can click the **Live Support** link at the top of the screen to start a chat session with an Intralinks client support specialist. A chat window will open and you will be connected with a support specialist.

A number of other support tools are available. To view them, click the Help icon in the navigation panel on the left side of the screen; a Help pane will appear. Select one of the following options from the pane:

Live Support - This link opens the same chat window that the **Live Chat** link opens.

Support Center - This link opens the Intralinks Dealmanager Support Center. You can email a question to the Intralinks support team or start a chat session, get copies of the Dealmanager startup guides, view short video tutorials, access the Intralinks Academy resource center, and view FAQs for Intralinks Dealmanager.

Feature Tour - This link displays a video overview of Intralinks Dealmanager's key features.

What's New? - This link displays a video that shows the features added in the latest update to Intralinks Dealmanager. This link is helpful for those who have been using Intralinks Dealmanager for awhile and want to get up to speed on recent enhancements.

Intralinks Academy - This link displays Intralinks Academy, Intralinks' web-based collection of video tutorials and other learning materials.

Give Feedback - This link displays a text box that you can use to send feedback about your experience with Intralinks Dealmanager. Use this link, for example, if you want to suggest improvements or new features.

Logging out of Intralinks Dealmanager™

When you have finished working with Intralinks Dealmanager, click on the Logout icon at the bottom of the navigation bar on the left side of the screen.