



# Intralinks Integration Adapter Data Dictionary

## Reference Guide

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See Intralinks login page for other national numbers

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# Chapter 1: Introduction to the Intralinks Integration Adapter

The Integration Adapter can be used to transfer documents and/or contact information from a back-end system to Intralinks, ensuring that the information in both systems is up to date and accurate and reducing the amount of time spent on data entry.

The Integration Adapter can also be used to download documents and associated metadata from Intralinks exchanges and store it at a location of your choice.

All Integration Adapter functions are configured using an XML file. The same XML file can be used to perform file upload and/or download functions.

## About this guide

This guide is a reference guide for the ILIA data dictionary. See additional guides for the sample XML files and troubleshooting information.

Instructions and additional information about using ILIA can be found in the Knowledgebase of the **Intralinks Support Center**.

This guide is intended for:

- IT personnel who are responsible for implementing the Integration Adapter.
- The system administrator, the person within your organization who will be using the Intralinks Integration Adapter to upload information to Intralinks exchanges or to download documents and folders from Intralinks exchanges.

# Chapter 2: Integration Adapter Data Dictionary

This chapter contains a dictionary of XML definitions used for the field names, attributes and elements used in creating XML input files. It also contains the rules for constructing XML files following the Intralinks ILIA schema.

You can obtain a zip file of these schema by navigating to the Intralinks exchange where you downloaded the Integration Adapter and documentation.

The following subjects are covered in this chapter:

- Mapping of data types to fields
- ILIA schema definition
  - ExecuteData
  - Batch and Job information
  - Workspaces
  - Folders
  - Document
  - Alert
  - Users
  - User
  - MemberRoles
  - Group
  - Group elements
  - Permissions
  - DocumentCriteria
  - How DocumentCriteria filtering works
  - ConfigCustomField
  - PassThrough Fields
  - Document-centric report
  - Document Access report
  - User-centric report
  - User Comparison report
  - Time bound download
- Output report definition (.XSD)
- Common Parameters Charts

- [Country](#)
- [Roles](#)
- [Title](#)
- [Functional Area](#)
- [Industry](#)
- [TimeZone](#)

## Mapping of data types to fields

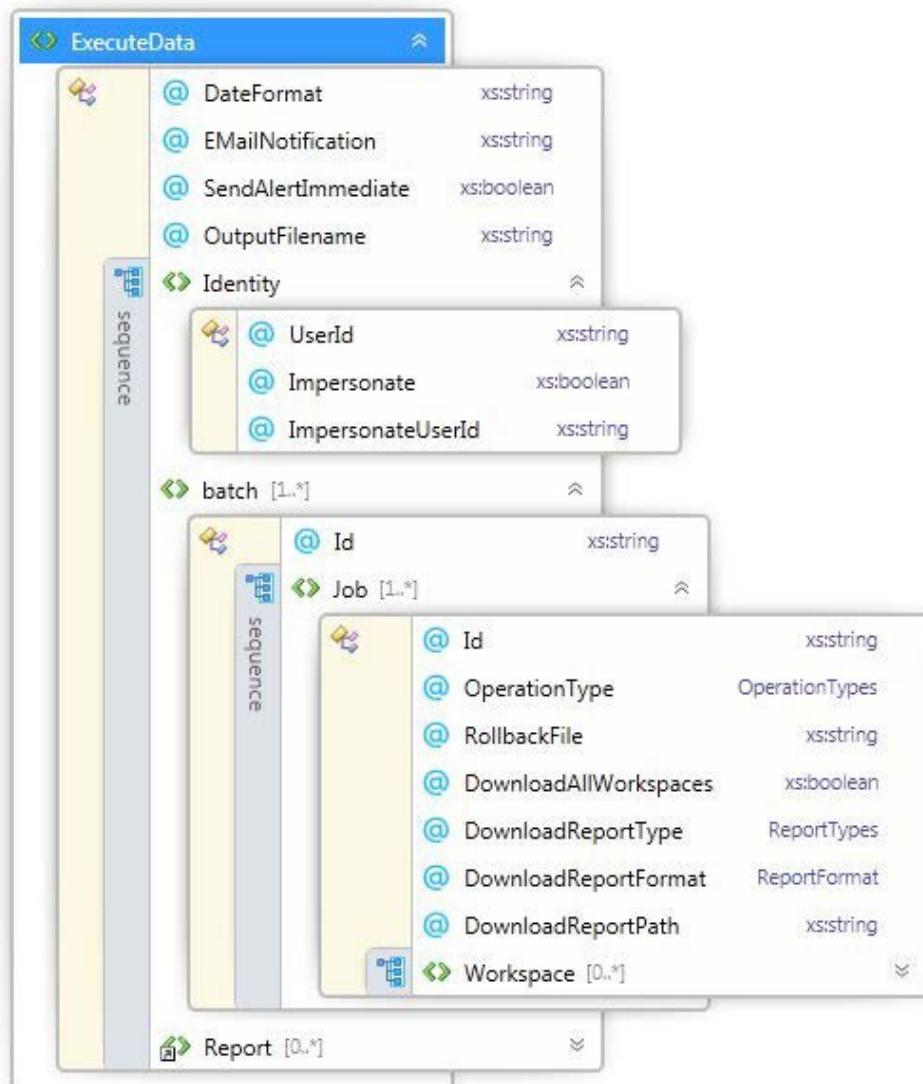
Field Name	Type	Comments
OperationTypes	enumerated	Create Remove Update Synchronize Rollback Download
EMailId	string (email address)	The email address of a user who is added to the Intralinks exchange.
FirstName	string	See Validation Rules in Appendix B
LastName	string	See Validation Rules in Appendix B
Org	string	See Validation Rules in Appendix B
Phone	string	See Validation Rules in Appendix B
Role	string	Can be one of the following:  "REVIEWER" "PREVIEWER" "PUBLISHER" "MANAGER_LTD" "MANAGER" "REVIEWER_PLUS" "PUBLISHER_PLUS" "HIDDEN_MANAGER_PLUS" "MANAGER_PLUS"
UserId	string	The email address that ILIA uses to perform actions on the Intralinks exchange. See Validation Rules in Appendix B
GroupId	string	See Validation Rules in Appendix B
Group<Name>	string	See Validation Rules in Appendix B
Group<Type>	string	See Validation Rules in Appendix B
Workspace<Id>	string	See Validation Rules in Appendix B
Workspace<Name>	string	See Validation Rules in Appendix B

## ILIA schema definition

This section explains how the ILIA schema is organized.

### ExecuteData

ExecuteData is the top level of the command file.



## ExecuteData attributes

Attribute Name	Data Type	Usage	Note
DateFormat <sup>1</sup>	string	optional	Specify format of date strings in XML Input file (e.g. dd-MM-yyyy).
EMailNotification	string	optional	Comma separated list of email addresses. <sup>3</sup>
SendAlertImmediate <sup>2</sup>	boolean	optional	true = document alerts will always be sent immediately.
OutputFilename	string	optional	Used to define the name of the Output XML file. The file name will be this string plus the first batch ID plus the date time stamp.  If this field is set it will override the setting in the Configuration Manager.

1 - See [Date Format](#) for instructions on setting the date.

2 - All users in all exchanges will receive the alert immediately if this flag is on.

3 - This setting will override the notification list specified in the Configuration Manager.

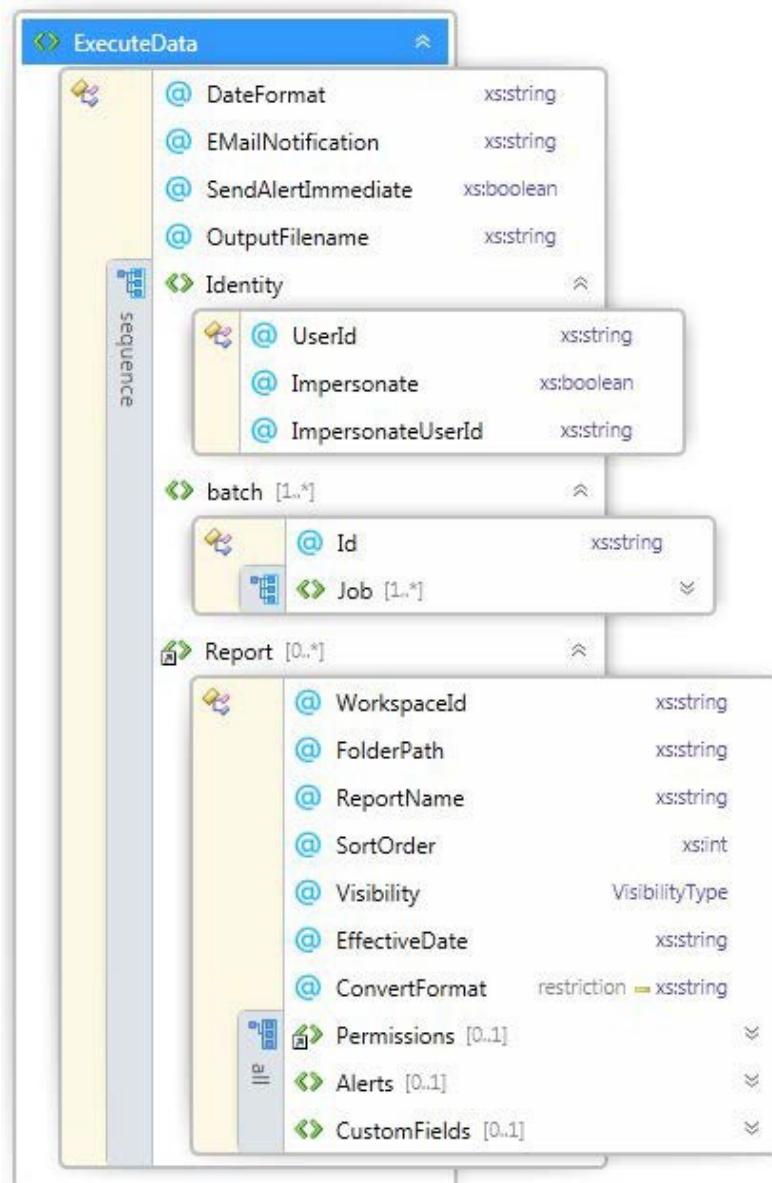
## ExecuteData elements

Attribute Name	Min	Max	Usage
Identity	1	1	required
batch	1	unbounded	required
Report	0	unbounded	optional

## ExecuteData expanded

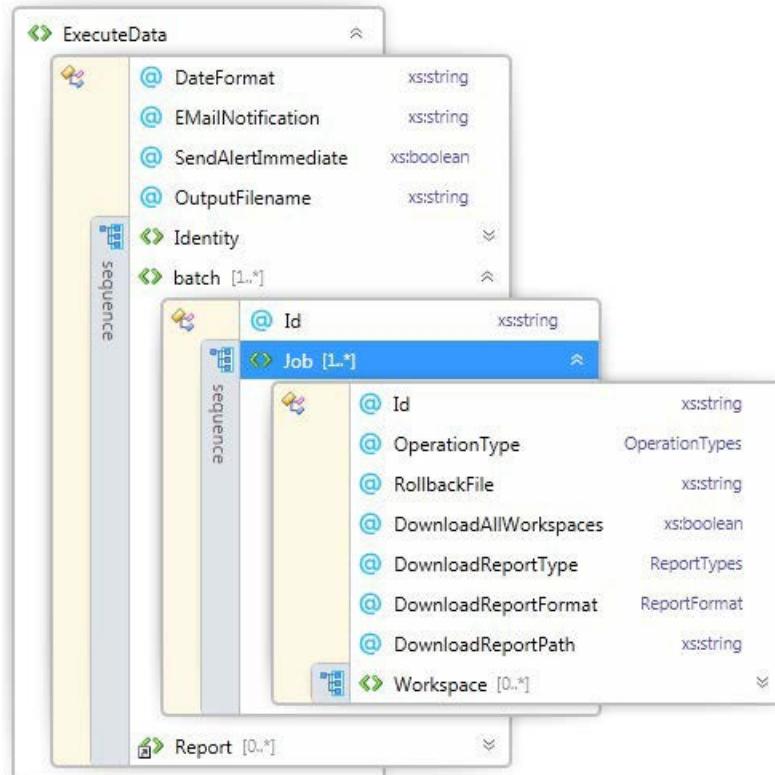
- Within Execute data you provide the information about the identity that will be doing the operations.
- Batch is the specific work this command file is going to do.
- Report is an optional item that allows you to publish the Output report into a designated exchange, in addition to publishing it in the Output folder.

**Note:** Impersonate (shown below) is not currently supported.



## Batch and Job information

- Job is where the specific operation type is defined and the workspace is defined
- Operation types can be:
  - Create
  - Remove
  - Synchronize
  - Update
  - Rollback
  - Download



## Job attributes

Attribute Name	Data Type	Usage	Note
Id	string	required	Required unless DownloadAllWorkspaces is set to "true" on the job level.
OperationType	OperationType (enum)	optional	Create Remove Update Rollback Download Synchronize Close
RollbackFile	Full path/filename of rollback file	optional	If OperationType=Rollback this must refer to a rollback file (output file from previous job).
DownloadAll Workspaces	boolean	optional	OperationType=Download "true" will return results from all exchanges that the user has privileges for, without the need to mention a specific exchange in the XML Input file.
DownloadReportPath*	string	optional	The path to save the report file. This path must exist.
DownloadReportType	enum	optional	DocumentCentric DocumentAccess UserCentric UserComparision DealReport
DownloadReportForm at	enum	optional	CSV XML
DownloadType	Enum	optional	Full Incremental Timebound
FromDate	string	optional	Used to set a time range for timebound downloads. This is a required field only for timebound downloads.
ToDate	string	optional	Used to set a time range for timebound downloads. This is a required field only for timebound downloads.
FailedAlertOnly	boolean	optional	Applicable only to the Document Access Report.

\* The ILIA Service requires that all paths used to specify file locations are on a local drive or specified using a UNC path if on a mapped drive. This includes paths in the input XML files and in the UI Configuration screens.

When using a UNC path to another computer, the source computer must allow the account running ILIA to have access to the files on that computer.

If a mapped drive is selected for the Input, Output, Archive and File Download path in the Configuration Manager, a warning message will be displayed and it will be converted to a UNC path.

An example of a UNC path: *//acomputer123/folder/myfile*

## Job element

<b>Attribute Name</b>	<b>Min</b>	<b>Max</b>	<b>Usage</b>
Workspace	0	unbounded	required

## Workspaces

Workspace [0..*]	
@ Id	xs:string
@ Type	WorkspaceType
@ Name	xs:string
@ AmendmentVoteID	xs:string
@ DealCurrency	xs:string
@ CusipID	xs:string
@ AddRemovedUsers	xs:boolean
@ PvPDeclaration	PPTType
@ Phase	xs:string
@ SuppressWelcomeAlert	xs:boolean
@ AddUserProtectPeriod	xs:int
@ SuppressAlerts	xs:boolean
@ AmendmentVoteProcessName	xs:string
@ IncludeDeleted	xs:boolean
@ IncludePreviousVer	xs:boolean
@ DownloadType	DownloadType
@ IncludePlaceholders	xs:boolean
@ Create	xs:boolean
@ Template	xs:string
@ Host	xs:string
@ Description	xs:string
@ PublishFields	xs:boolean
CustomFields [0..1]	>
ConfigCustomFields [0..1]	>
Users [0..1]	>
Groups [0..1]	>
Tranches [0..1]	>
Folders [0..1]	>
PassThroughFields [0..1]	>
DocumentCriteria [0..1]	>
GroupUserCriteria [0..1]	>
RemoveUserNote [0..1]	xs:string

## Workspace attributes

Attribute Name	Data Type	Usage	Note
Id	string	required	
Name	string	optional	See <a href="#">Validation Rules</a> .
AmendmentVoteID	string	optional	See .
DealCurrency	string	optional	See .
CusipID	string	optional	See .
AddRemovedUsers	boolean	optional	true = Users that removed themselves can be re-added to the exchange.  This attribute exists to preserve version compatibility. It has been deprecated.
PvPDeclaration	Enum	optional	PrivateOnly PublicOnly PublicAndPrivate
Phase	string	optional	Open Hold Preparation
AddUserProtectPeriod	integer	optional	Number of days to protect users who are removed from being re-added.  0=no protection  <b>Note:</b> The setting here will override the setting in the Configuration Manager.
SuppressAlert	boolean	optional	Concerns the Welcome to Workspace Alert Default = false (no suppression)
SuppressWelcomeAlert	boolean	optional	This can only be used when updating the phase of an exchange
These attributes are used for the Download feature only.			
IncludeDeleted	boolean	optional	Include deleted documents in download.
IncludePreviousVer	boolean	optional	Include previous versions of documents in download.

Attribute Name	Data Type	Usage	Note
DownloadType	Enum	optional	Full Incremental Timebound
IncludePlaceholders	boolean	optional	Include document placeholders in download.
These attributes are used for exchange creation only.			
Create	boolean	optional	Must be true if creating a new exchange.
Template	string	optional	Must contain template ID if creating an exchange.
Host	string	optional	Must contain host name if creating an exchange.
Description	string	optional	Description of new exchange.
PublishFields	boolean	optional	true=Publish the custom fields in an exchange.
EnableDocumentAutoAlerts	boolean	optional	true=Send auto alerts for uploaded documents
These attributes are used for exchange close only.			
DealClose	boolean	required	
DealClosingDate	string	required	
DealComplete	Enum	optional	Yes No NotApplicable
DealClosingRange	Enum	optional	Range_0M_250M Range_250M_500M Range_500M_750M Range_750M_1B Range_1B_10B Range_10B_50B Range_50B_Plus

Attribute Name	Data Type	Usage	Note
DealClosingCurrency	Enum	optional	USD EUR GBP AUD CAD CNY HKD INR JPY NZD PLN RON RUB TWD BRL CLP COP NOK DKK SEK KPW KRW

## Workspace elements

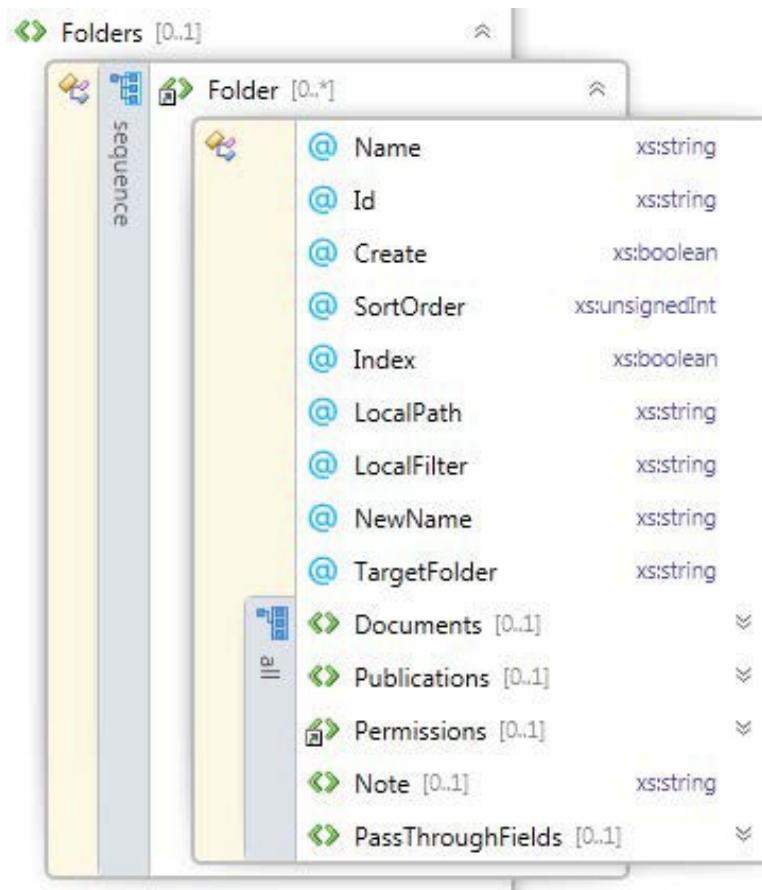
Attribute Name	Min	Max	Usage
CustomFields	0	1	
ConfigCustomFields	0	1	
Users	0	1	
Groups	0	1	
Folders	0	1	
DocumentCriteria	0	1	
RemoveUserNote	0	1	Will be included in the removal alert for all of the users removed from the exchange
GroupUserCriteria	0	1	Allow filtering of report data based on user and group.
PassThroughFields	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.

## Folders

Within the Workspace information there can be an element for Folders.

- Folders contains all the information about specific folder items that you are working with in this command file
  - There can be 0 to the exchange limit on the number of folders that can be included
- The specific folder to be used in the exchange.
  - This can be a new folder or an existing folder
- A folder contains documents
- Permissions set at the folder level will apply to all documents in the folder
  - See [Permissions](#) for important information on folder permissioning.



## Folder attributes

Attribute Name	Data Type	Usage	Note
Name	string	required	
Id	string	optional	ID of folder. This can be used instead of the name.
Create	boolean	optional	true=Create if "Create Folders" option is enabled in UI.
SortOrder	integer (zero and negative values are not allowed)	optional	The same sort order cannot be assigned to two documents or folders at the same level.
Index	boolean	optional	This can only be set for top-level folders.
LocalPath*	string	optional	Specify path to copy files from local to exchange (e.g. "C:\Temp").
LocalFilter	string	optional	Filter local files to copy (e.g. "*.*").
NewName	string	optional	
TargetFolder	string	optional	

\* The ILIA Service requires that all paths used to specify file locations are on a local drive or specified using a UNC path if on a mapped drive. This includes paths in the input XML files and in the UI Configuration screens.

When using a UNC path to another computer, the source computer must allow the account running ILIA to have access to the files on that computer.

If a mapped drive is selected for the Input, Output, Archive and File Download path in the Configuration Manager, a warning message will be displayed and it will be converted to a UNC path.

An example of a UNC path: //acomputer123/folder/myfile

## Folder elements

Attribute Name	Min	Max	Usage
Documents	0	1	optional See Validation Rules in Appendix B.
Permissions	0	1	optional
Note	0	1	folder note optional string See Validation Rules in Appendix B.
PassThroughFields	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.

## Folder creation behavior

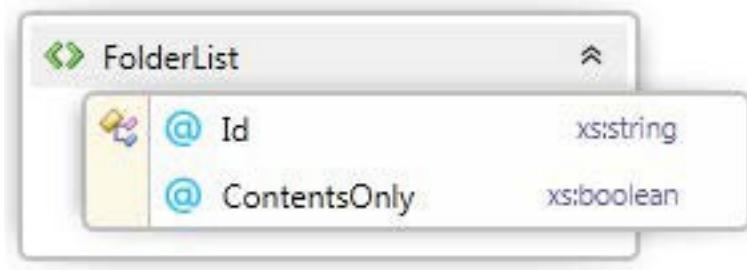
If the folder specified in the input file is found on the exchange, it will be used. If the folder is not found, the following table can be used to determine if the folder will be created.

The Configuration Setting refers to the "Create folder if it does not exist" option in the Configuration Manager. "XML Create" is the "Create" attribute in the Folder element in the XML file.

	<b>Configuration Setting = true</b>	<b>Configuration Setting = false</b>
XML Create=true	Create folder	Create folder
XML Create=false	Do not create folder	Do not create folder
XML Create not specified	Create folder	Do not create folder

**Note:** A duplicate folder will not be created under any conditions.

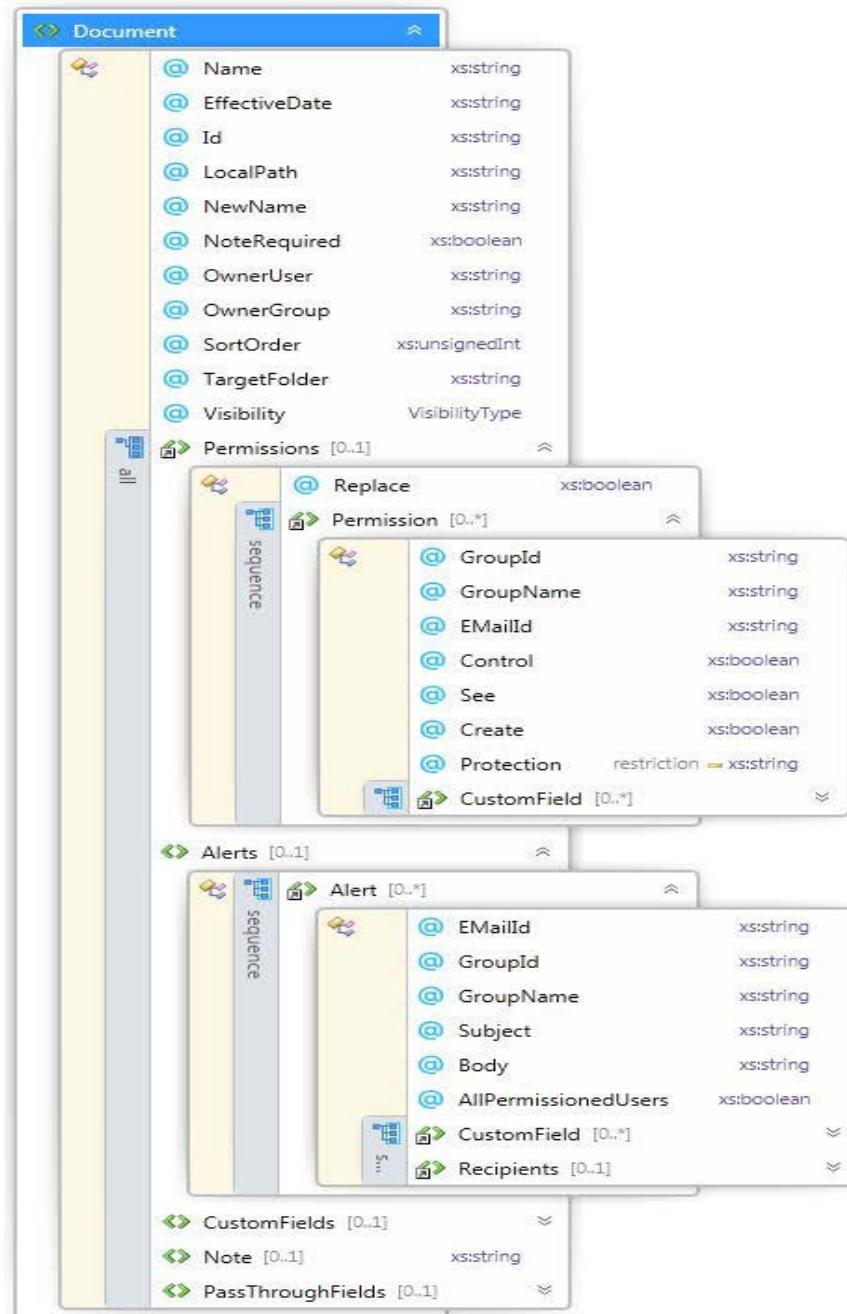
## FolderList Attributes



Attribute Name	Data Type	Usage	Note
Id	string	optional	Folder ID
ContentsOnly	boolean	optional	Used for Remove operation only.  true=Only contents will be deleted  false=Folder and contents will be deleted (default)

## Document

- This is the specific file information.
  - Local path is the source file path on the local system
  - NoteRequired indicates if the note must be displayed each time the file is viewed or accessed
- Permissions are for that specific file/document



## Document attributes

Attribute Name	Data Type	Usage	Note
Name	string	required	See Validation Rules in Appendix B.
EffectiveDate	date	optional	
Id	string	optional	This is valid only when operation type is Update or Remove.
LocalPath*	string	optional	Used to point to the file that needs to be attached to the document.
NewName	string	optional	New name of document.
NoteRequired	boolean	optional	See "Note" in Document elements below.
OwnerUser	string	optional	User name or user email address.
OwnerGroup	string	optional	Group name or group ID.
SortOrder	integer (zero and negative values are not allowed)	optional	The same sort order cannot be assigned to two documents or folders at the same level.
TargetFolder	string	optional	Name/Id of folder to move document into.
Visibility	enum	optional	public private

\* The ILIA Service requires that all paths used to specify file locations are on a local drive or specified using a UNC path if on a mapped drive. This includes paths in the input XML files and in the UI Configuration screens.

When using a UNC path to another computer, the source computer must allow the account running ILIA to have access to the files on that computer.

If a mapped drive is selected for the Input, Output, Archive and File Download path in the Configuration Manager, a warning message will be displayed and it will be converted to a UNC path.

An example of a UNC path: `//computer#/folder/myfile`

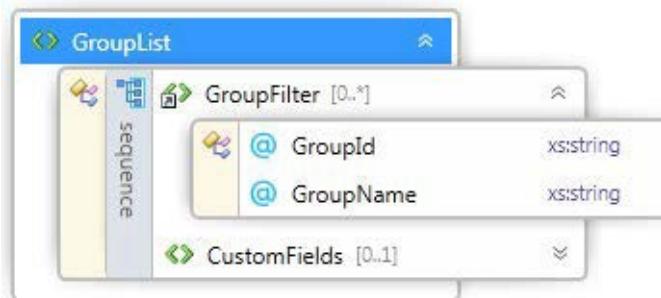
## Document elements

Element Name	Min	Max	Usage	Note
Permissions	0	1	optional	
Alerts	0	1	optional	
CustomFields	0	1	optional	Field name/value pairs
Note*	0	1	optional	string
PassThroughFields	0	1**	optional	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* The length of a note cannot exceed 4000 characters.

\*\* PassThroughFields can contain more than one PassThroughField.

## GroupList element



## GroupList Elements

Element Name	Min	Max	Usage	Note
GroupFilter	0	unbounded		
CustomField	0	1		Filter groups by custom field name/value pairs.
UserFilter	0	unbounded		

## GroupFilter attributes

Attribute Name	Data Type	Usage	Note
GroupId	string	optional	ID of group
GroupName	string	optional	Name of group

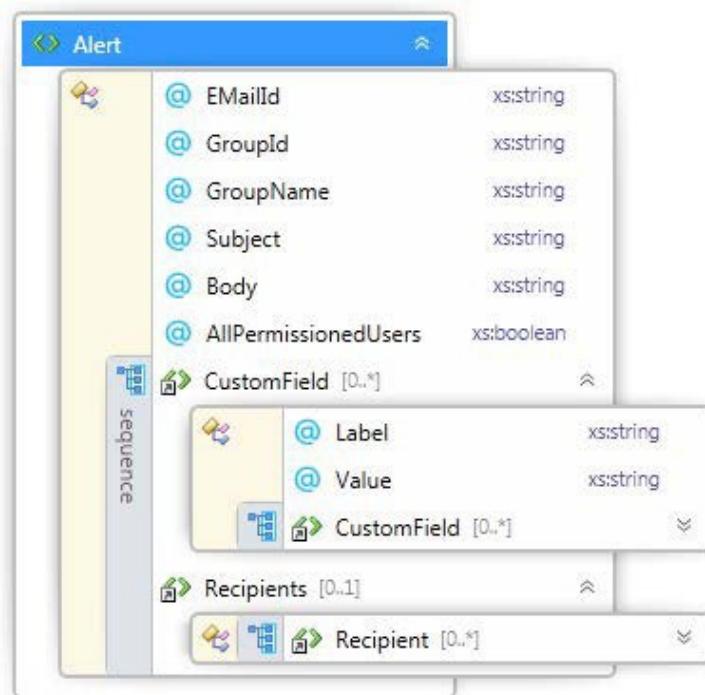
## UserFilter attributes

Attribute Name	Data Type	Usage	Note
UserEmailId	string	optional	ID of user
UserId	string	optional	Unique ID of user in Global User Directory (GUD)
UserName	string	optional	First and last name of user
Visibility	visibility type	optional	public private

## Alert

This information needs to be provided when sending an alert about a document.  
ILIA does not support a custom alert note.

Add Recipient diagram



## Alert attributes

Attribute Name	Data Type	Usage	Note
EmailId	string	optional	ID of user in group
GroupId	string	optional	ID of group
GroupName	string	optional	Name of group
Subject	string	optional	Subject of alert email
Body	string	optional	Body message of alert email
AllPermissionedUsers	boolean	optional	Send to all users permissioned to see the document

## Alert elements

Attribute Name	Min	Max	Usage
CustomField	0	unbounded	
Recipients	0	1	

## Users

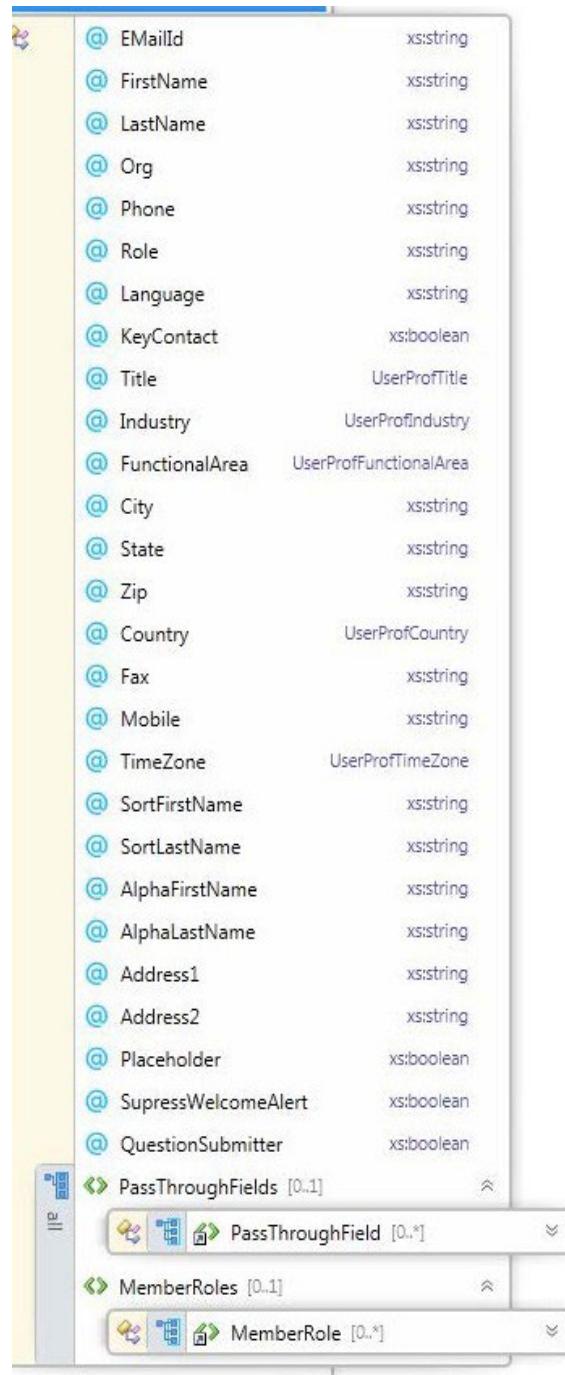
- Contains the user elements for this action.

Users [0..1]

	User [0..*]	
sequence		
	EMailId xs:string	
	FirstName xs:string	
	LastName xs:string	
	Org xs:string	
	Phone xs:string	
	Role xs:string	
	Language xs:string	
	Title UserProfTitle	
	Industry UserProfIndustry	
	FunctionalArea UserProfFunctionalArea	
	City xs:string	
	State xs:string	
	Zip xs:string	
	Country UserProfCountry	
	Fax xs:string	
	Mobile xs:string	
	TimeZone UserProfTimeZone	
	SortFirstName xs:string	
	SortLastName xs:string	
	AlphaFirstName xs:string	
	AlphaLastName xs:string	
	Address1 xs:string	
	Address2 xs:string	
	Placeholder xs:boolean	
	SupressWelcomeAlert xs:boolean	
	PassThroughFields [0..1]	
	MemberRoles [0..1]	

## User

- User is the element for the specific user information.
- The initial values, shown below, can be set when adding a person to the Global User Directory (GUD).
  - If the person is already in the GUD, their information will be validated against the existing record and the differences will be reported.
- The role in the exchange can be set for existing users only.



## User attributes

Attribute Name	Data Type	Usage	Note
EMailID	string	required	See Validation Rules in Appendix B
FirstName	string	required	See Validation Rules in Appendix B
LastName	string	required	See Validation Rules in Appendix B
Org	string	required	See Validation Rules in Appendix B
Phone	string	required	See Validation Rules in Appendix B
Roles	string	required	Can be one of the following:  "REVIEWER" "PREVIEWER" "PUBLISHER" "MANAGER_LTD" "MANAGER" "REVIEWER_PLUS" " "PUBLISHER_PLU S" "HIDDEN_MANAGE R_PLUS" "MANAGER_PLUS"
Language	string	optional	English (default) French German Japanese Portuguese Spanish Chinese
keyContact	boolean		
Title	string	optional	
Industry	string	optional	
Functional Area	string	optional	
City	string	optional	City
State	string	optional	State
ZipCode	string	optional	Zip Code
Country	string	optional	Country

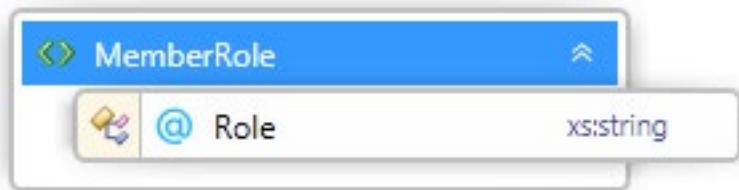
Attribute Name	Data Type	Usage	Note
Fax	string	optional	Fax
Mobile	string	optional	Mobile
TimeZone	string	optional	Time Zone
SortFirstName	string	optional	SortFirstName
SortLastName	string	optional	SortLastName
AlphaFirstName	string	optional	AlphaFirstName
AlphaLastName	string	optional	AlphaLastName
Address1	string	optional	
Address2	string	optional	
Placeholder	boolean	optional	true=placeholder user
SupressWelcomeAlert	boolean	optional	true=alert will not be sent.
QuestionSubmitter	boolean	optional	true=submitter false=default  If a Question Submitter exists and you enter false, the user's right to submit questions for that Buyer Group will be removed.

## User elements

Element Name	Min	Max	Usage
MemberRoles	0	1	The MemberRoles feature must be enabled on the exchange.  Group roles are only valid when adding/updating users in groups.
PassThroughFields	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.

## MemberRoles



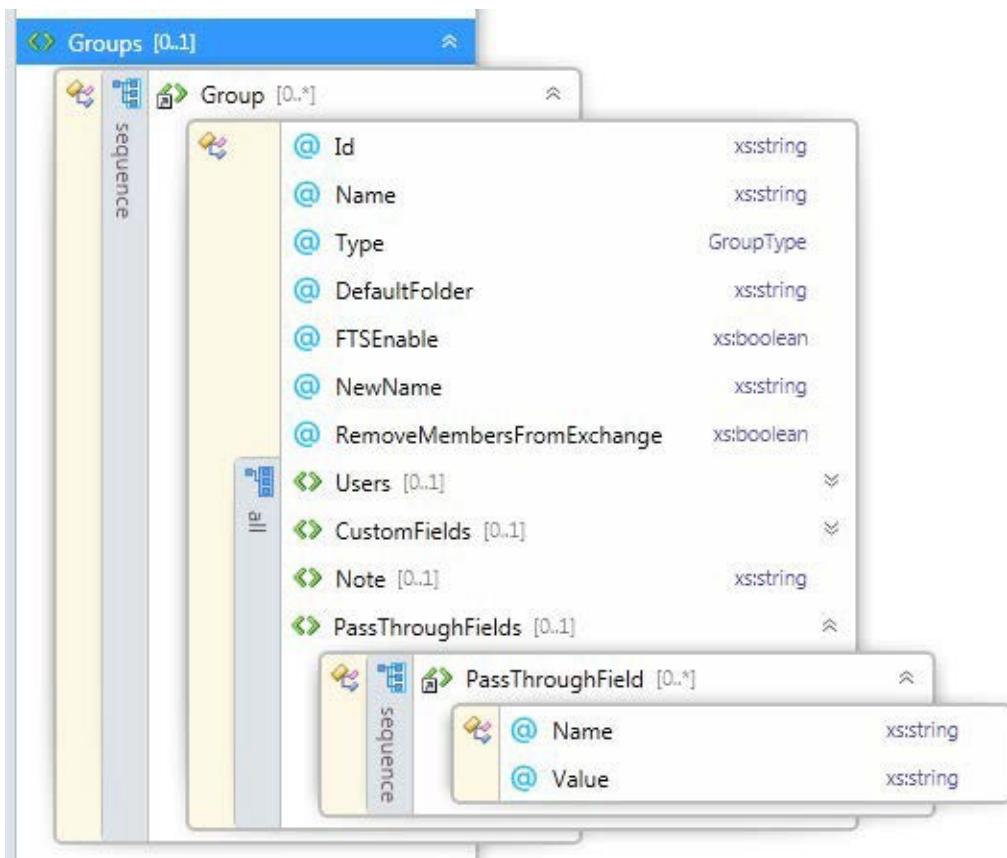
Element Name	Min	Max	Usage
MemberRole	0	unbounde d	Specifies one member role.

## MemberRole attributes

Attribute Name	Data Type	Usage	Note
Role	string	optional	Name of member role.

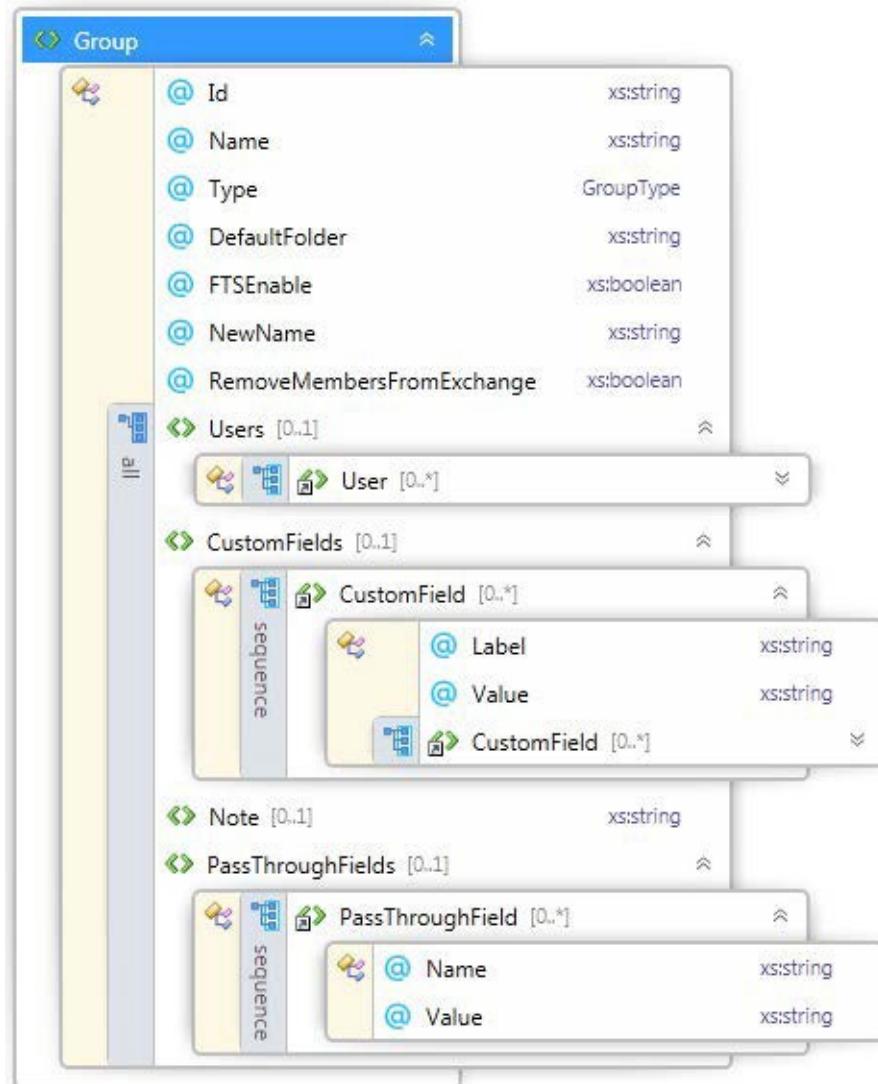
## Groups

- Contains the Group elements



## Group

- This is the information on a specific group
- A group can contain a set of users, and a set of custom fields.



## Group attributes

Attribute Name	Data Type	Usage	Note
Id	string	optional	Group ID (if you don't want to identify the group by name)
Name	string	required	

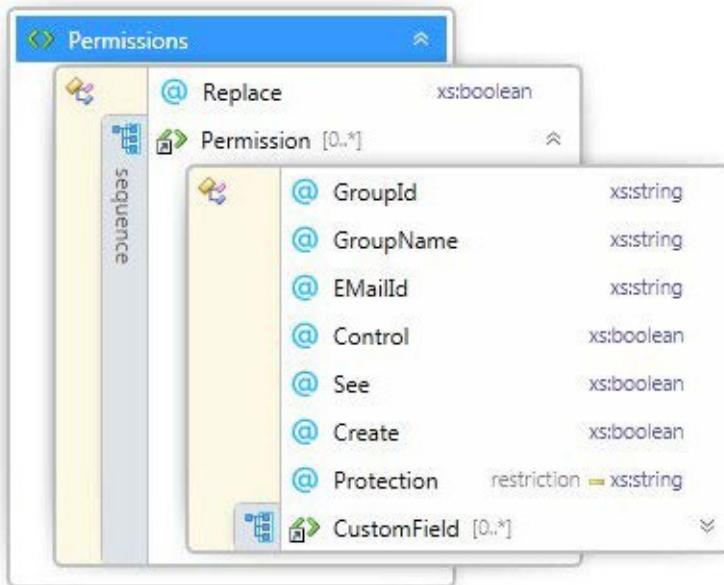
Attribute Name	Data Type	Usage	Note
Type	string	optional	Workspace (default) Buyer Collaboration
DefaultFolder	string	optional	When creating or updating groups; ILIA will set the default folder for the specified group(s).
FTSEnable	boolean	optional	True=Enable Full Text Search
NewName	string	optional	New name of folder
RemoveMembersFromExchange	boolean	optional	True=Members will be removed from the exchange

## Group elements

Attribute Name	Min	Max	Usage
Users	0	1	optional
CustomFields	0	1	optional
Note	0	1	optional
PassThroughFields	0	1*	optional

\* PassThroughFields can contain more than one PassThroughField.

## Permissions



### Permissions attributes

Attribute Name	Data Type	Usage	Note
Replace	boolean	optional	true=existing document /folder permissions will be replaced with these permissions.

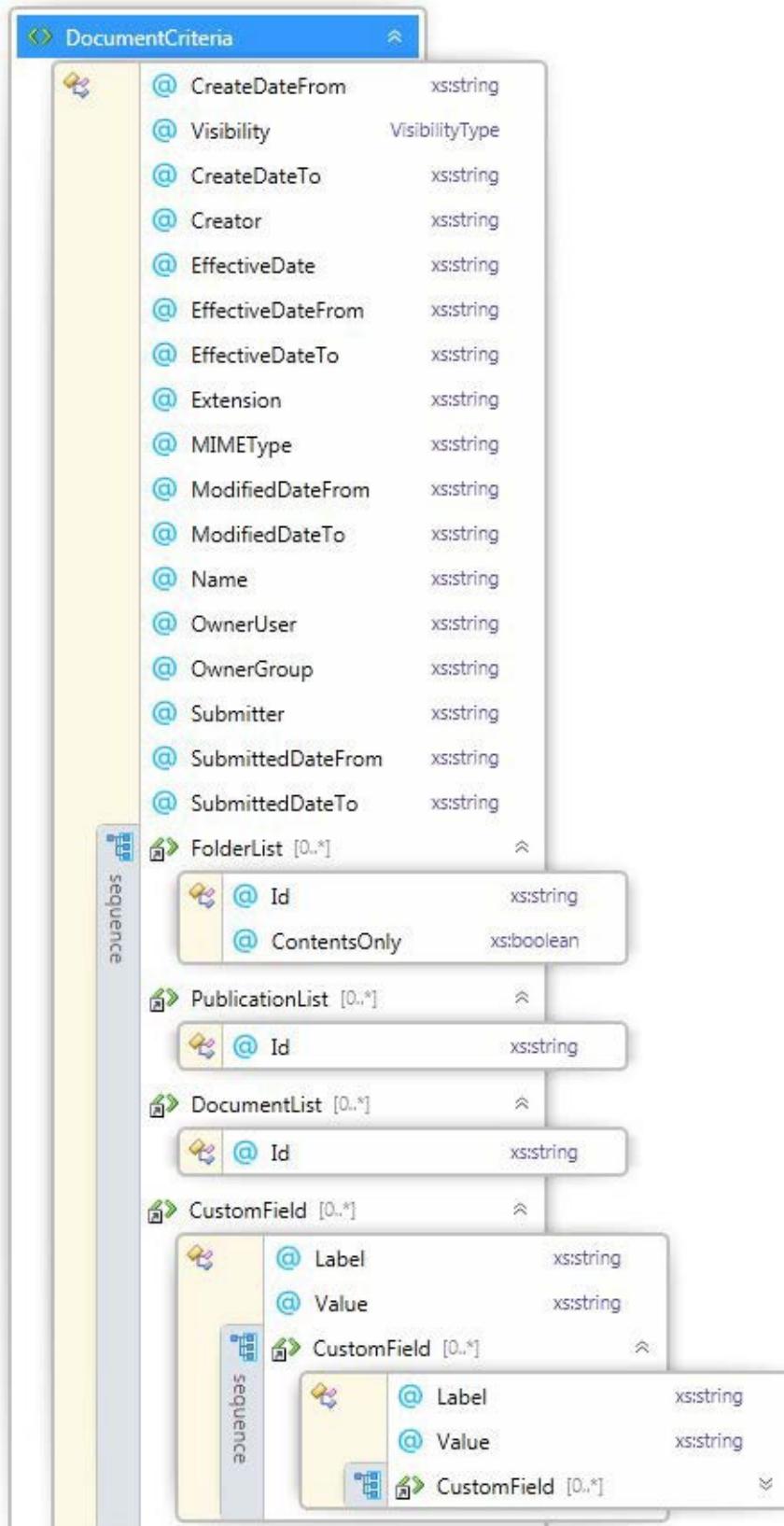
## Permission attributes

<b>Attribute Name</b>	<b>Data Type</b>	<b>Usage</b>	<b>Note</b>
GroupId	string	optional	ID of group
GroupName	string	optional	Name of group. See Validation Rules in Appendix B.
EmailId	string (email address)	optional	By specifying the email address of a user, ILIA will search for all of the groups that this user is a member of, and will permission all of these groups. See Validation Rules in Appendix B.
Control	boolean	optional	true=Control permission
See	boolean	optional	
Create	boolean	optional	
Protection	string (ENUM)	optional	NoProtect Protect ProtectNoPrint

## Permission element

<b>Attribute Name</b>	<b>Min</b>	<b>Max</b>	<b>Usage</b>
CustomField	0	unbounded	All of the groups that match the defined custom fields will be permissioned.

## DocumentCriteria



## DocumentCriteria attributes

The DocumentCriteria attributes will be combined together (AND'd) and only the documents that meet all the criteria will be included in the filter operation.

Attribute Name	Data Type	Usage	Note
CreateDateFrom <sup>1</sup>	string (date)	optional	Date of file creation Use to include files newer than this date.
Visibility	visibility type	optional	Filter documents on the exchange based on their public/private declaration.
CreateDateTo <sup>1</sup>	string (date)	optional	Date of file creation Use to include files older than this date.
Creator	string	optional	Name of document creator.
EffectiveDate <sup>1</sup>	string	optional	
EffectiveDateFrom <sup>1</sup>	string	optional	A filter to find documents
EffectiveDateTo <sup>1</sup>	string	optional	A filter to find documents
Extension	string	optional	Any extension to the document
MIMEType	string	optional	Type of file.
ModifiedDateFrom <sup>1</sup>	string (date)	optional	Date of file last changed. Use to include files newer than this date.
ModifiedDateTo <sup>1</sup>	string (date)	optional	Date of file last changed. Use to include files older than this date.
Name	string	optional	Name of file. Wildcard character * and ? are allowed.
OwnerUser	string	optional	User's name (first, last) or user's email address.
OwnerGroup	string	optional	Group name or group ID
Submitter	string	optional	Email address or user name
SubmittedDateFrom <sup>1</sup>	string	optional	
SubmittedDateTo <sup>1</sup>	string	optional	

1 - See [Date Format](#) for instructions on setting the date.

## DocumentCriteria elements

The FolderList and DocumentList and elements provide a way to filter the document list by specifying the Document ID's and Folder Id's. The criteria

attributes will then be applied to this list. If no ID's are specified then the criteria attributes will be applied to the entire exchange.

Element Name	Min	Max	Usage
FolderList	0	unbounded	optional
DocumentList	0	unbounded	optional
CustomField	0	unbounded	optional

### How DocumentCriteria filtering works

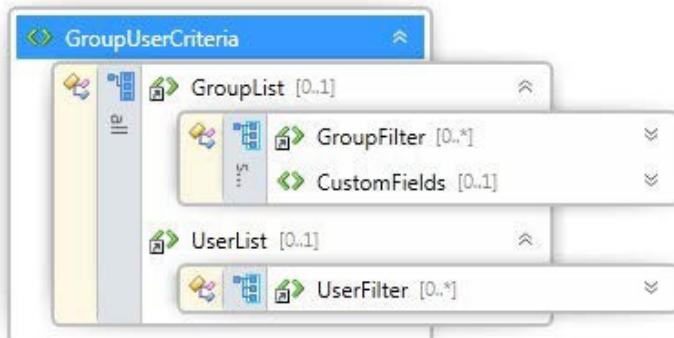
When the DocumentCriteria element is defined in the input file the attributes in the criteria (Name, Creator, etc.) will be compared against the folders and documents in the "Candidate" list. This comparison is not case sensitive.

By default all of the folders and documents in the exchange will be included in the candidate list. If a FolderList and/or a DocumentList is defined, only these folders, and documents will be include in the candidate list.

Also, if any Folder or Document elements are defined in the input file, they will also be included in the candidate list.

**Note:** In all operations using the document criteria for filtering items to be included in that operation, the document criteria uses parent custom field values for filtering and ignores the child custom fields.

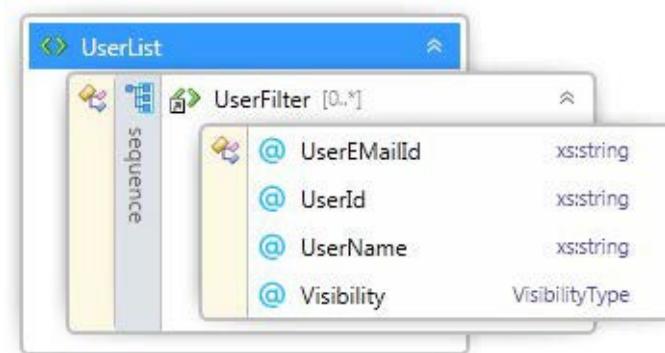
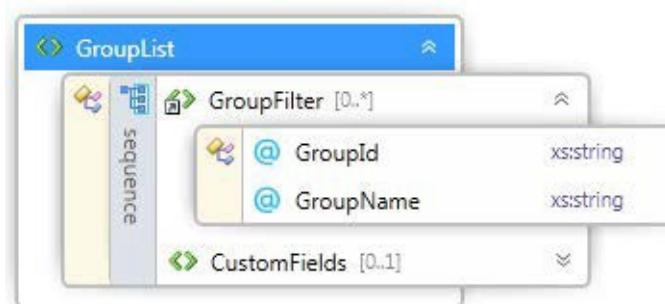
## GroupUserCriteria



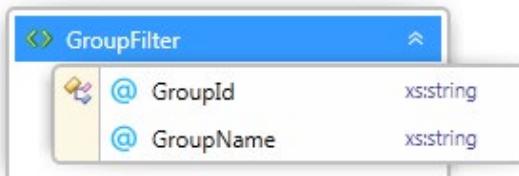
Element Name	Min	Max	Usage	Note
GroupList	0	1		
UserList	0	1		

## GroupUserCriteria elements

Element Name	Min	Max	Usage	Note
GroupFilter	0	unbounded		
CustomFields	0	1		
UserFilter	0	unbounded		



**Note:** The `UserId` is referred to as the `InternalId` in the User-centric and User Access reports.



## CustomFields



### CustomField attributes

Attribute Name	Data Type	Usage	Note
Label	string	required	
Value	string	required	

### CustomField elements

Element Name	Min	Max	Usage
CustomField	0	unbounded	optional

CustomField can contain children to allow setting values of child custom fields.

**Note:** ILP exchanges allow parent custom fields to have children but only one level deep (child custom fields cannot have children).

## ConfigCustomField

ConfigCustomField can be used to enable or disable custom fields in the exchange.



### ConfigCustomField attributes

Attribute Name	Data Type	Usage	Note
Label	string	required	
Type	string (enum)	required	Exchange Group Document
Parent	string	optional	Value of the parent custom field
Enable	boolean	optional	true=enabled false=disabled

### ConfigCustomField elements

Element Name	Min	Max	Usage
ConfigCustomField	0	unbounded	optional

ConfigCustomFields can contain children (only one level deep) to allow enabling/disabled child custom fields.

### DocumentList Attributes

Attribute Name	Data Type	Usage	Note
Id	string	optional	Document ID

\* The ILIA Service requires that all paths used to specify file locations are on a local drive or specified using a UNC path if on a mapped drive. This includes paths in the input XML files and in the UI Configuration screens.

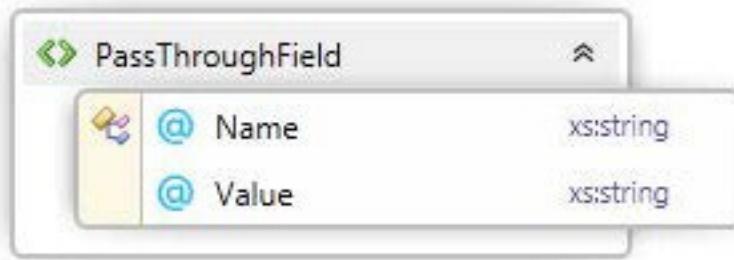
When using a UNC path to another computer, the source computer must allow the account running ILIA to have access to the files on that computer.

If a mapped drive is selected for the Input, Output, Archive and File Download path in the Configuration Manager, a warning message will be displayed and it will be converted to a UNC path.

An example of a UNC path: *//acomputer123/folder/myfile*

## PassThrough Fields

The passthrough fields are specified in the Input XML file and appear in the Output Report file.



## PassThrough attributes

Attribute Name	Data Type	Usage	Note
Name	string	required	Name of the passthrough field
Value	string	optional	Passthrough field value

## PassThrough elements

Element Name	Min	Max	Usage
PassThroughField	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.





## Document-centric report

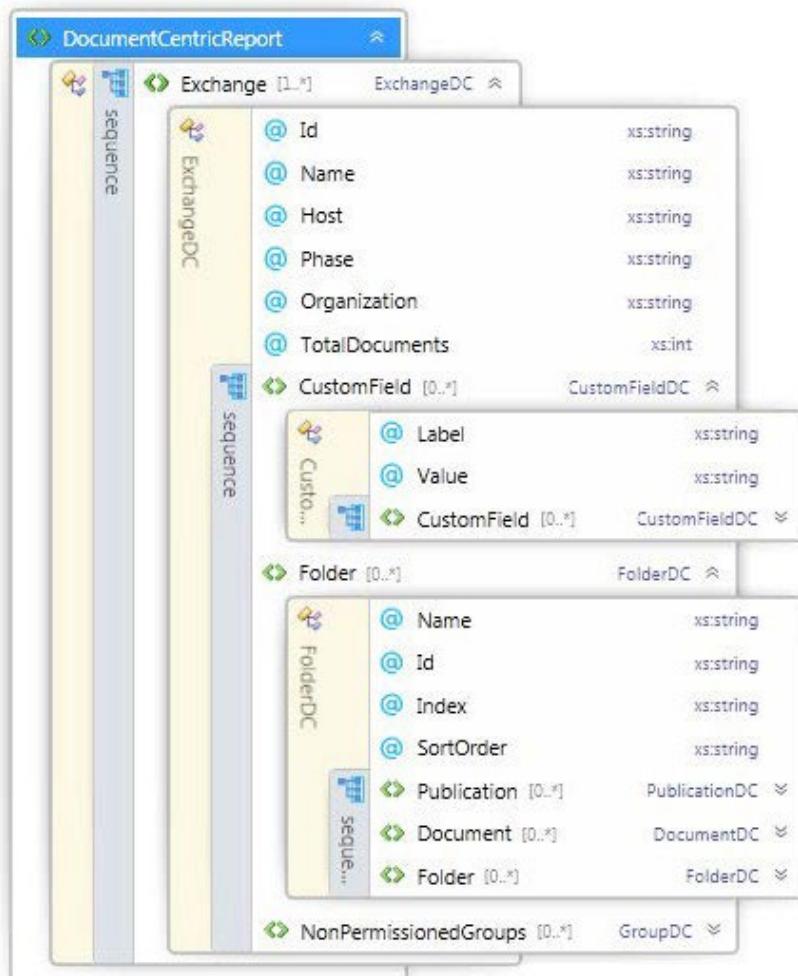
Attribute Name	Data Type	Usage	Note
WorkspaceID	string	required	
FolderPath	string	required	
ReportName	string	optional	
SortOrder	integer (zero and negative values are not allowed)	optional	
Visibility	visibility type	optional	
EffectiveDate	string	optional	
ConvertFormat	string (restricted)	optional	CSV HTML

The Document-centric report will provide the user with the details of the folders, documents, groups, users and permissions in one or more exchanges.

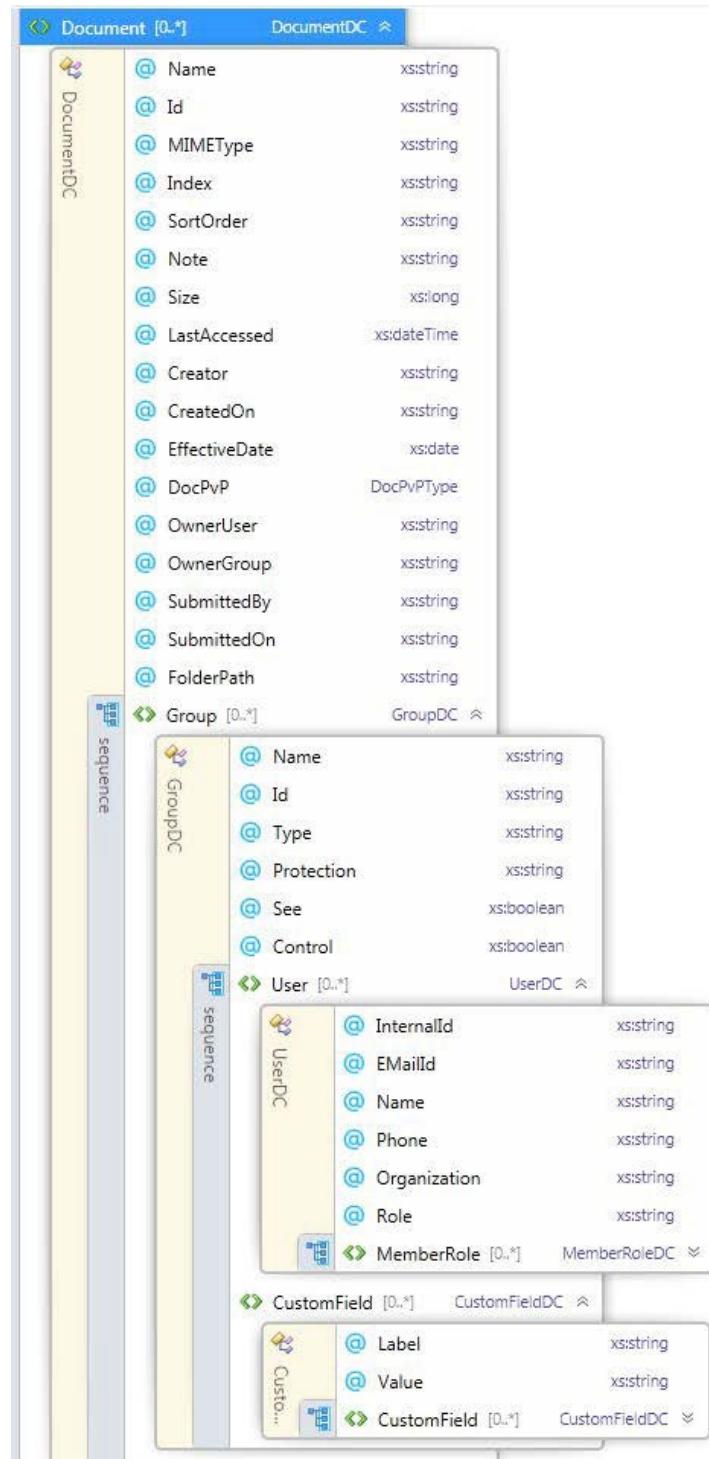
Two attributes are available at the job level of the input file to define the report details. These fields will only be used when the OperationType is "Download". The DocumentCriteria element can optionally be included to filter the document list. The report has been enhanced to include document owner, group member roles, and document submitter.

The report file will have the document data stored in the exchange hierarchy defined in the following diagram.

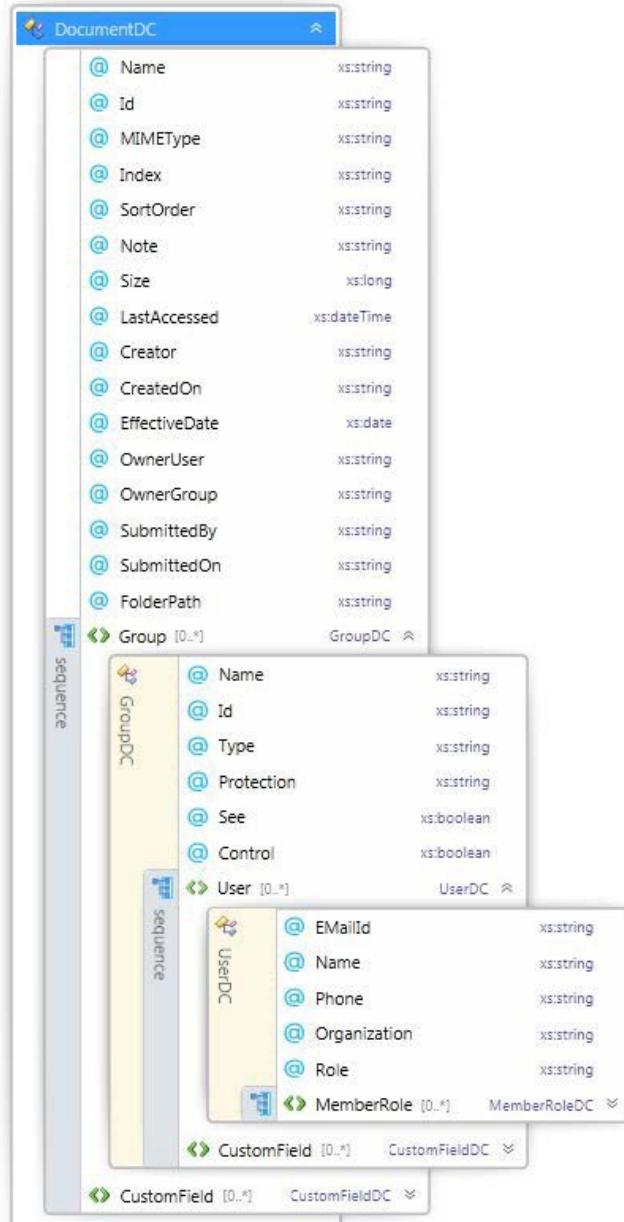
## Document-centric Report Schema (1)



## Document-centric Report Schema (2)



## Document-centric Report Document Element

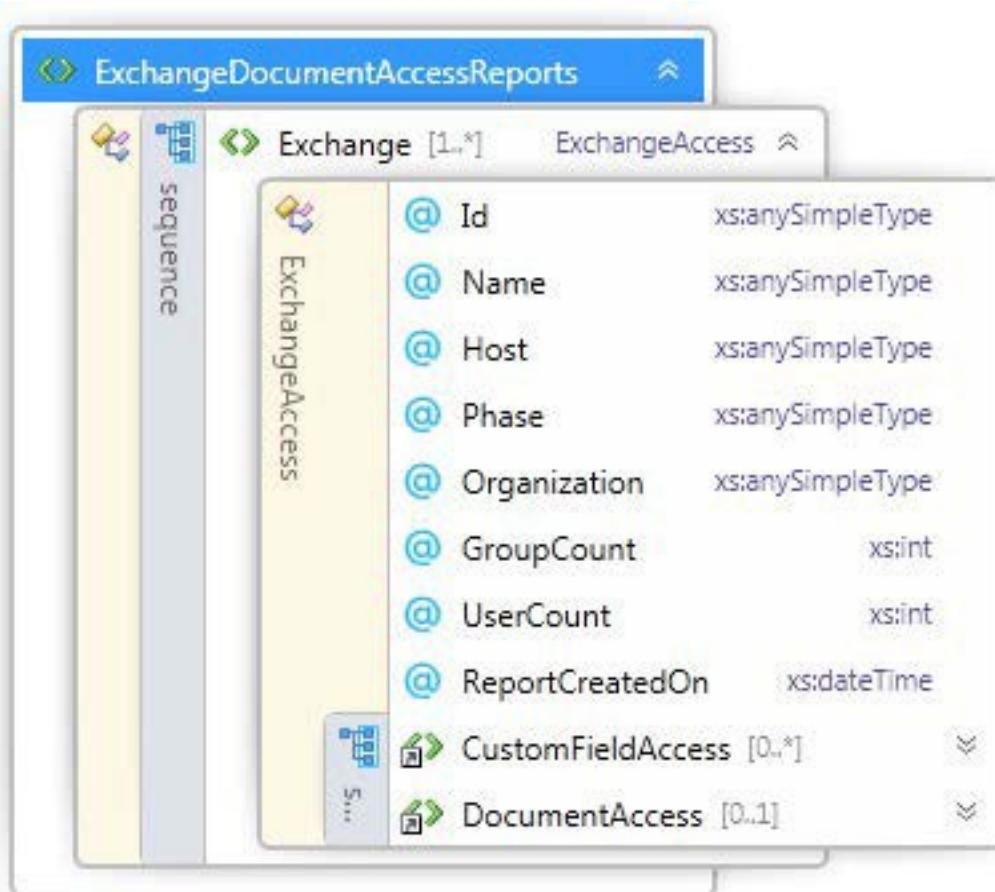


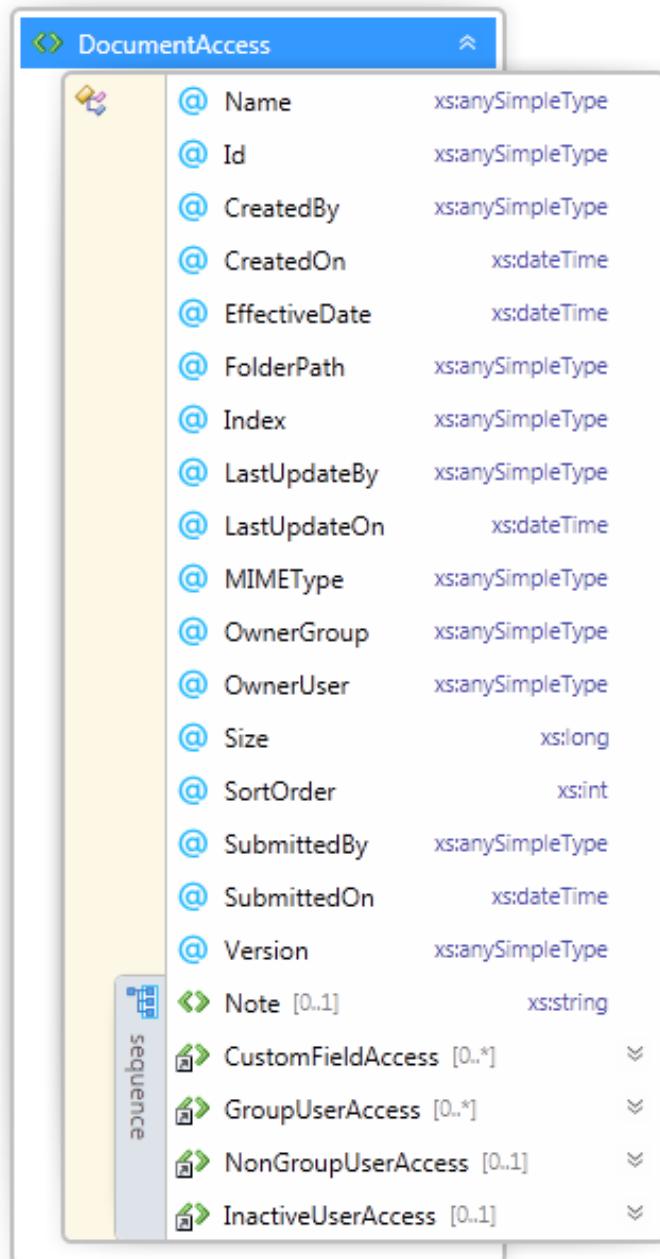
## Document Access report

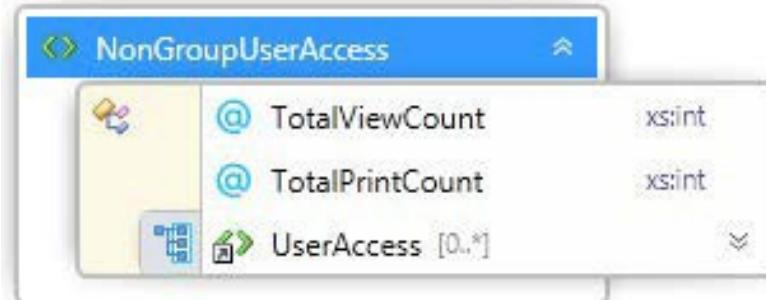
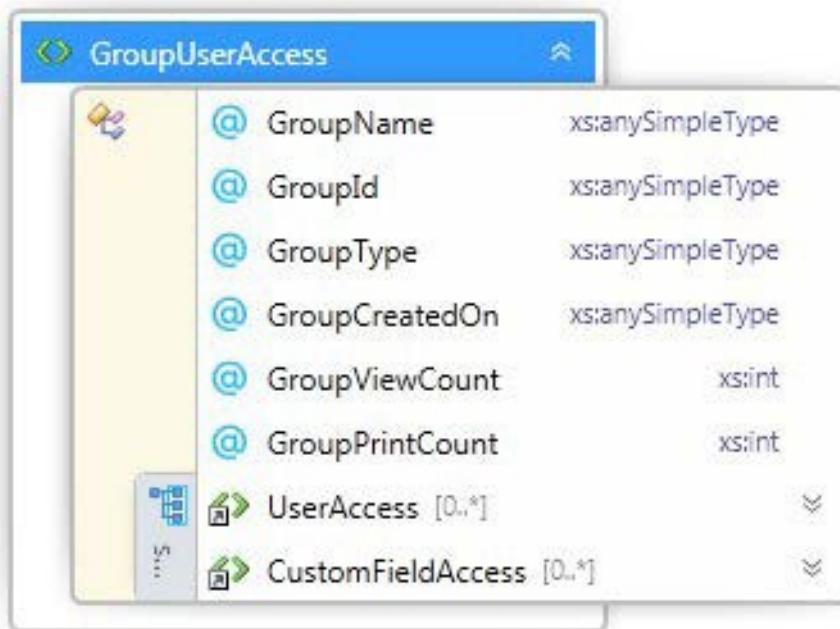
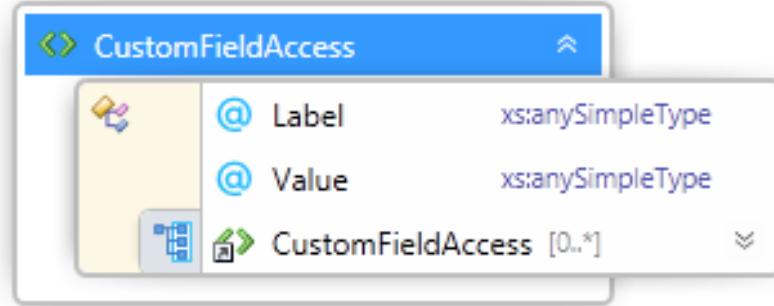
The Document Access report will provide the user with the exchange document access history for documents, users, groups including alert information (sent, failure status, failure description).

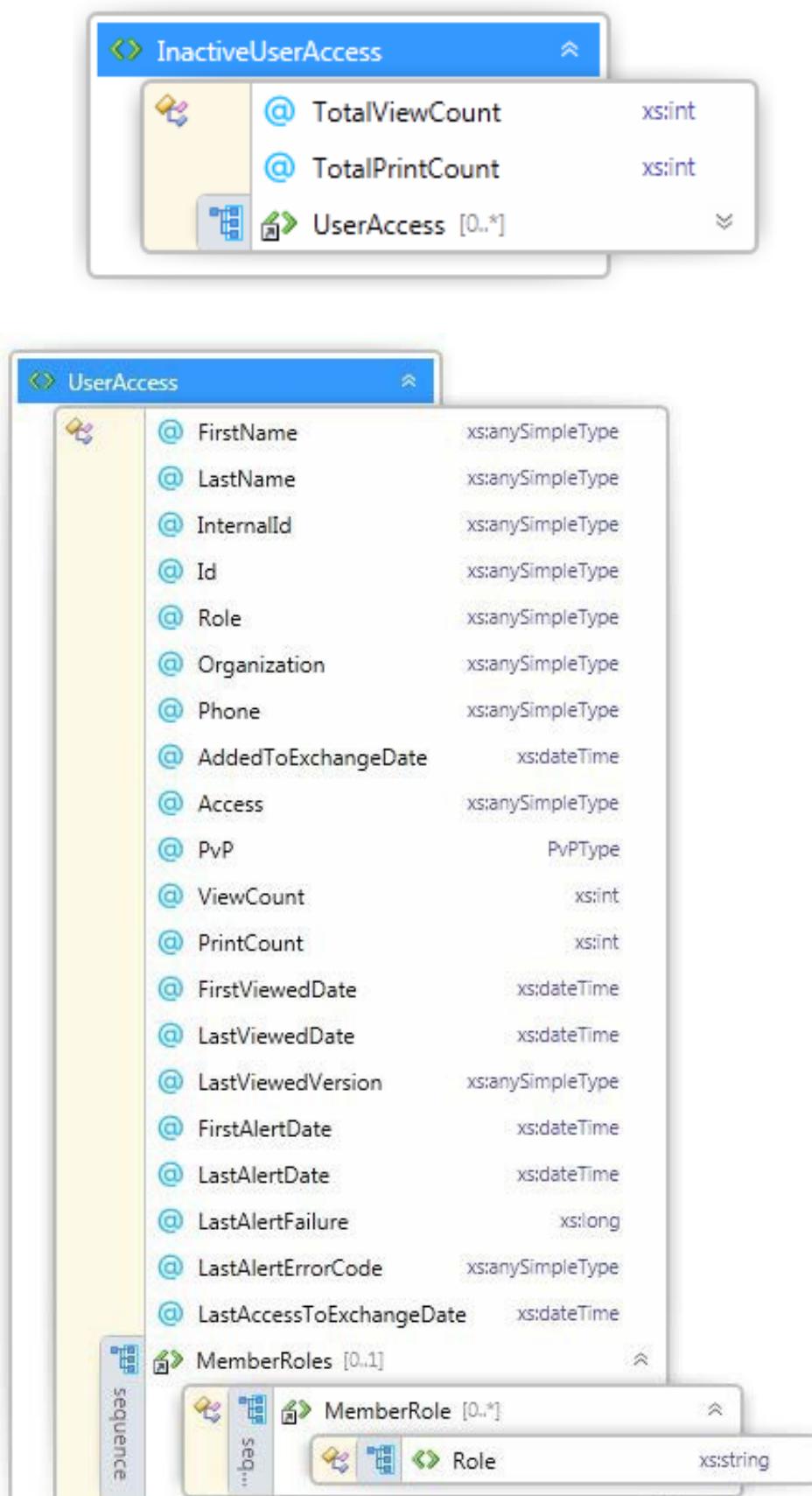
### Document Access report schema

The following diagrams define the XML elements and attributes that are used in the Document Access report.







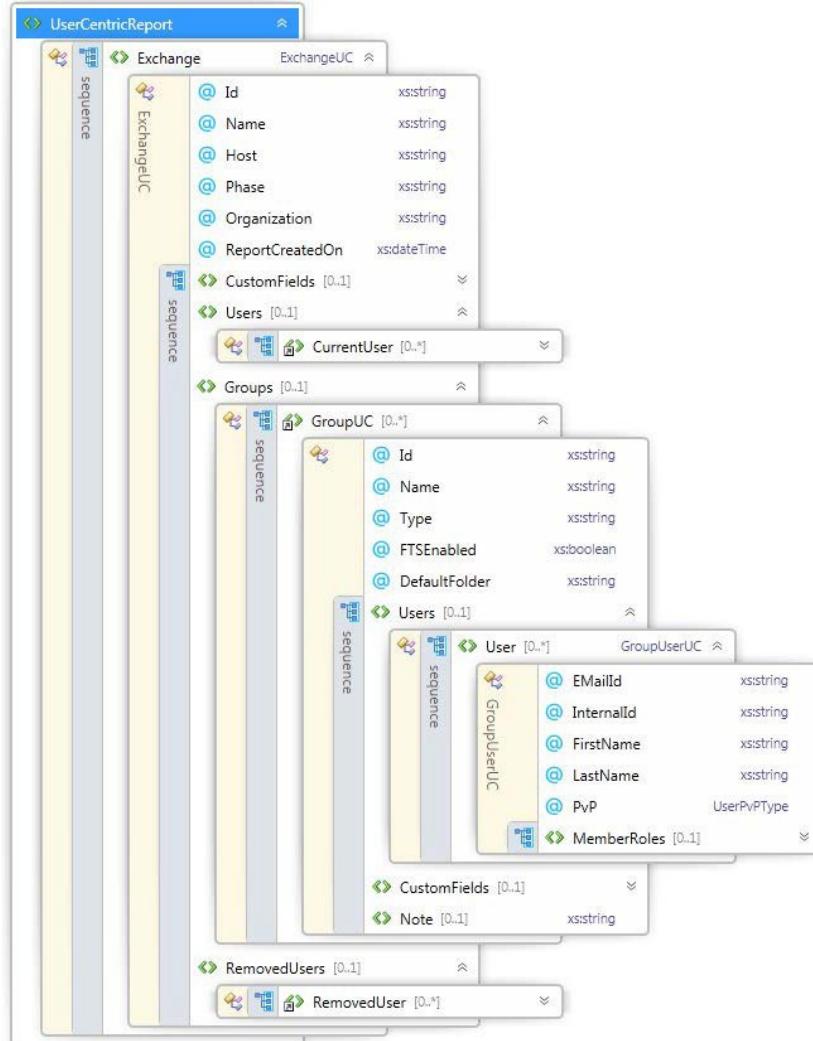


## User-centric report

The User-centric report provides filterable information about exchanges (names, IDs, phases, etc.), groups (names, custom fields, etc.), and users (names, addresses, phone numbers, whether removed, etc.).

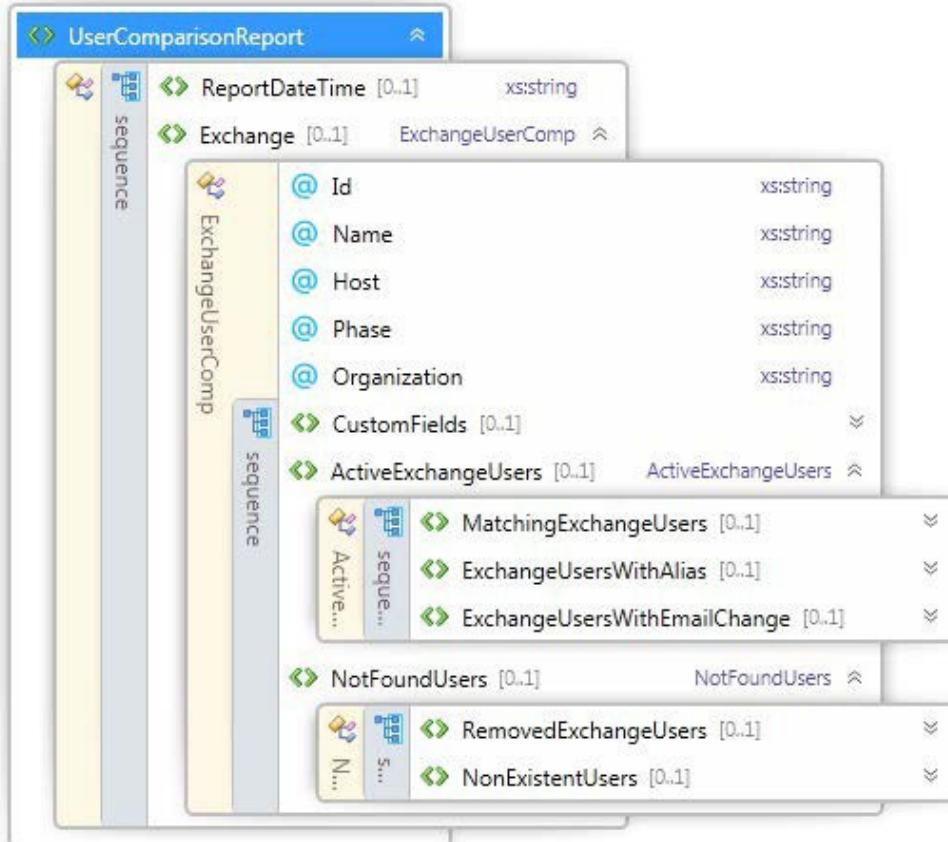
### User-centric report schema

The following diagrams define the XML elements and attributes that are used in the User-centric report.



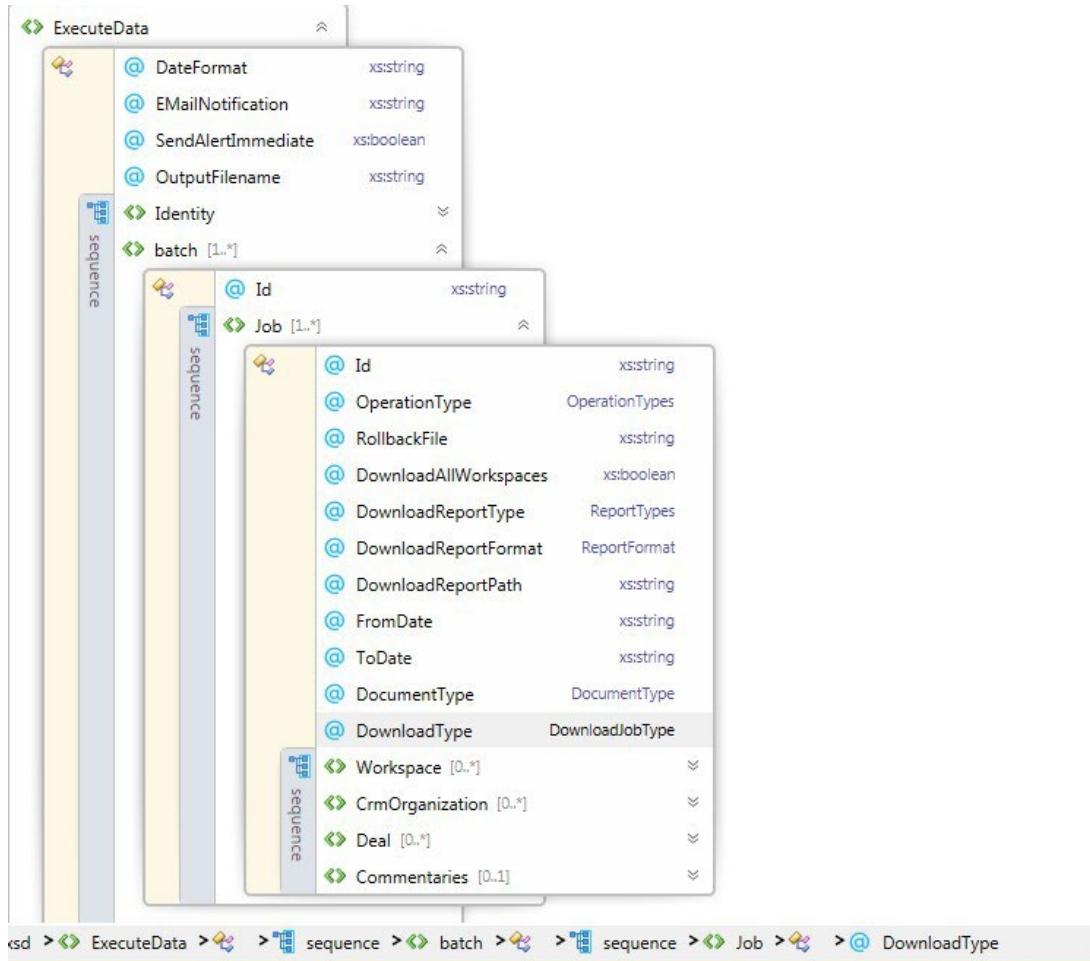
## User Comparison report

The User Comparison report compares user profile information in the Intralinks application to user profile information stored on a back-end system.



## Time bound download

A time bound download allows you to download documents that were added, documents that were modified or both new and modified documents within a specified time frame.



When you perform a timebound download, the output file will be similar to the following example:

```

<?xml version="1.0" encoding="utf-8"?>

<ProcessReport xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  ProcessingDateTime="2015-09-03T13:26:53.4036012+05:30"
  Description=""
  InputFileArchive="C:\Users\M1022338\Desktop\ILIA\Archive\Archive
  e 09.03.2015 13.26.51.xml" MachineID="A4MD21244">

  <Batch Id="1001">

    <Job Id="1" OperationType="Download">
  
```

```

<Workspace Id="4566301" Name="smitha_Exchange"
Status="Completed">

    <Command Type="Copy" ItemType="Document"
Name="~$cumentation for ILIA 4.8saasd" Status="Complete"
Description="Successfully downloaded file." ErrorCode="103014"
/>

    <Command Type="Copy" ItemType="Document" Name="Book1"
Status="Complete" Description="Successfully downloaded file."
ErrorCode="103014" />

    <Command Type="Copy" ItemType="Document" Name="Word"
Status="Complete" Description="Successfully downloaded file."
ErrorCode="103014" />

    <Command Type="Copy" ItemType="Document"
Name="Word111.abc" Status="Complete" Description="Successfully
downloaded file." ErrorCode="103014" />

    <Command Type="Copy" ItemType="Document"
Name="Documentation for ILIA 4.8.absss" Status="Complete"
Description="Successfully downloaded file." ErrorCode="103014"
/>

</Workspace>

</Job>

</Batch>

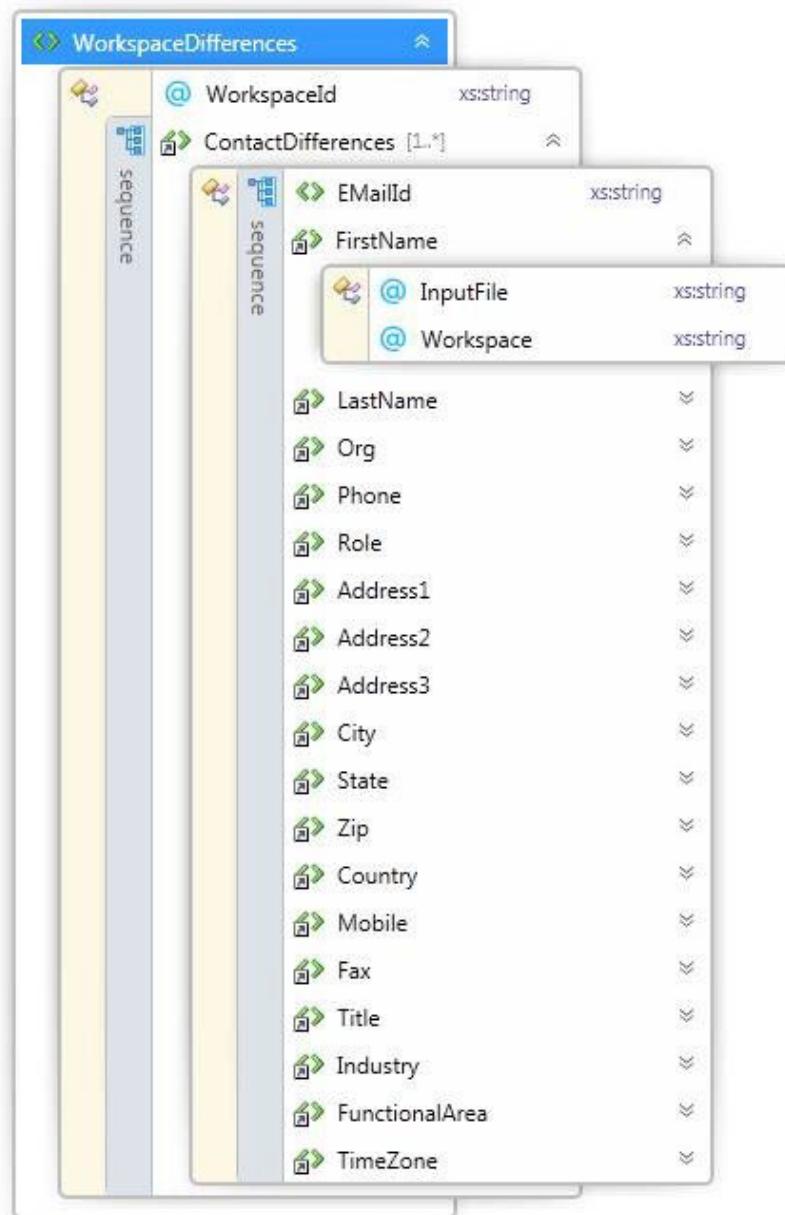
<ReportUpload />

</ProcessReport>

```

## Output report definition (.XSD)

The following diagram shows the WorkspaceDifferences element of the Output report file.



## Output file attributes

<b>Attribute Name</b>	<b>Data Type</b>	<b>Usage</b>	<b>Note</b>
Description	string	optional	
ProcessingDateTime	DateTime	optional	
InputFileArchive	string	optional	Location of archived input file

## Output file elements

<b>Attribute Name</b>	<b>Min</b>	<b>Max</b>	<b>Usage</b>
batch	1	unbounded	required
WorkspaceDifferences	0	unbounded	optional

## Batch attributes

<b>Attribute Name</b>	<b>Data Type</b>	<b>Usage</b>	<b>Note</b>
Id	string	optional	

## Batch elements

<b>Attribute Name</b>	<b>Min</b>	<b>Max</b>	<b>Usage</b>
Job	1	unbounded	required

## Job attributes

<b>Attribute Name</b>	<b>Data Type</b>	<b>Usage</b>	<b>Note</b>
Id	string	optional	
OperationType	enum	optional	Create Remove Update Download Rollback Synchronize
Status	enum	optional	NotStarted Completed PartiallyCompleted Failed

## Job elements

Attribute Name	Min	Max	Usage
Workspace	1	unbounded	

## Workspace attributes

Attribute Name	Data Type	Usage	Note
Id	string	required	
Name	string	optional	
Status	enum	optional	NotStarted Completed PartiallyCompleted Failed
Description	string	optional	

## Workspace elements

Attribute Name	Min	Max	Usage
Command	0	unbounded	optional
PassThroughFields	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.

## Command attributes

Attribute Name	Data Type	Usage	Note
Type	enum	required	Add Update Delete
ItemType	enum	optional	Folder Document Group User
Id	string	optional	ID of object on IL.
Name	string	optional	ID of object on IL.
Status	enum	optional	Complete Error
Description	string	optional	

## Command elements

Attribute Name	Min	Max	Usage
PassThroughFields	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.

## Workspace attributes

Attribute Name	Data Type	Usage	Note
WorkspaceId	string	optional	

## Workspace elements

Attribute Name	Min	Max	Usage
ContactDifferences	0	unbounded	optional

## Contact Differences attributes

Attribute Name	Data Type	Note
EMailId	string	
FirstName		*
LastName		*
Org		*
Phone		*
Role		*
Address1		*
Address2		*
Address3		*
City		*
State		*
ZipCode		*
Country		*
Mobile		*
Fax		*
Title		*
Industry		*
TimeZone		*

\* Element will exist only if workspace and input value are different. Both the workspace value and the input value will be included.

## Passthrough elements

Element Name	Min	Max	Usage
PassThroughField	0	1*	A string to keep track of a user, document, folder, etc. Not processed in XML file but returned in XML Output file.

\* PassThroughFields can contain more than one PassThroughField.

## Common Parameters Charts

### Country

<b>Value</b>	<b>Status</b>
AFGHANISTAN	Afghanistan
ALBANIA	Albania
ALGERIA	Algeria
AMERICAN_SAMOA	American Samoa
ANDORRA	Andorra
ANGOLA	Angola
ANGUILLA	Anguilla
ANTARCTICA	Antarctica
ANTIGUA	Antigua
ARGENTINA	Argentina
ARMENIA	Armenia
ARUBA	Aruba
ASCENSION_ISLAND	Ascension Island
AUSTRALIA	Australia
AUSTRIA	Austria
AZERBAIJAN	Azerbaijan
BAHAMAS	Bahamas
BAHRAIN	Bahrain
BANGLADESH	Bangladesh
BARBADOS	Barbados
BARBUDA	Barbuda
BELARUS	Belarus
BELEM	Belem
BELGIUM	Belgium
BELIZE	Belize
BENIN	Benin
BERMUDA	Bermuda
BHUTAN	Bhutan
BOLIVIA	Bolivia

Value	Status
BOSNIA	Bosnia
BOTSWANA	Botswana
BOUVET_ISLAND	Bouvet Island
BRAZIL	Brazil
BRITISH_VIRGIN_ISLANDS	British Virgin Islands
BRUNEI_DARUSSALM	Brunei Darussalm
BULGARIA	Bulgaria
BURKINA_FASO	Burkina Faso (former Upper Volta)
BURUNDI	Burundi
CAMBODIA	Cambodia
CAMEROON	Cameroon
CANADA	Canada
CAPE_VERDE	Cape Verde
CAYMAN_ISLANDS	Cayman Islands
CENTRAL_AFRICAN_REPUBLIC	Central African Republic
CHAD	Chad
CHILE	Chile
CHINA	China (People's Republic)
CHRISTMAS_ISLAND	Christmas Island
CIS	CIS
COCOS_KEELING_ISLANDS	Cocos Keeling Islands
COLOMBIA	Colombia
CONGO	Congo
COOK_ISLANDS	Cook Islands
COMOROS	Comoros
COSTA_RICA	Costa Rica
CROATIA	Croatia
CUBA	Cuba
CYPRUS	Cyprus
CZECH_REPUBLIC	Czech Republic
DENMARK	Denmark
DIEGO_GARCIA	Diego Garcia

Value	Status
DJIBOUTI	El Salvador
DOMINICA	Dominica
DOMINICAN_REPUBLIC	Dominican Republic
ECUADOR	Djibouti
EGYPT	Ecuador
EL_SALVADOR	Egypt
EQUATORIAL_GUINEA	Equatorial Guinea
ERITREA	Eritrea
ESTONIA	Estonia
ETHIOPIA	Ethiopia
FALKLAND_ISLANDS	Falkland Islands
FAROEISLANDS	Faroe Islands
FIJI	Fiji
FINLAND	Finland
FRANCE	France
FRENCH_GUIANA	French Guiana
FRENCH_POLYNESIA	French Polynesia
FRENCH_SOUTHERN_TERRITORIES	French Southern Territories
FYROM	Fyrom (Macedonia)
GABON	Gabon (Gabonese Republic)
GAMBIA	Gambia
GEORGIA	Georgia
GERMANY	Germany
GHANA	Ghana
GIBRALTAR	Gibraltar
GRAND_CAYMAN	Grand Cayman
GREECE	Greece
GREENLAND	Greenland
GRENADA	Grenada
GUADELOUPE	Guadeloupe
GUAM	Guam
GUANTANAMO_BAY	Guantanamo Bay

Value	Status
GUATEMALA	Guatemala
GUERNSEY	Guernsey
GUINEA	Guinea
GUINEA_BISSAU	Guinea-Bissau
GUYANA	Guyana
HAITI	Haiti
HEARD_ISLAND_AND_MCDONALD_ISLANDS	Heard Island and McDonald Islands
HERZEGOVINA	Herzegovina
HONDURAS	Honduras
HONG_KONG	Hong Kong
HUNGARY	Hungary
ICELAND	Iceland
INDIA	India
INDONESIA	Indonesia
IRAN	Iran
IRAQ	Iraq
IRELAND	Ireland (Irish Republic, Eire)
ISLE_OF_MAN	Isle of Man
ISRAEL	Israel
ITALY	Italy
IVORY_COAST	Ivory Coast (La Cote d'Ivoire)
JAMAICA	Jamaica
JAPAN	Japan
JERSEY	Jersey
JORDAN	Jordan
KAZAKHSTAN	Kazakhstan
KENYA	Kenya
KHMER_REPUBLIC	Khmer Republic (Cambodia/Kampuchea)
KIRIBATI_REPUBLIC	Kiribati Republic (Gilbert Islands)
KOREA_REPUBLIC_OF_SOUTH_KOREA	Korea, Republic of (South Korea)

Value	Status
KUWAIT	Kuwait
KYRGYSTAN	Kyrgystan
LAOS	Laos
LATVIA	Latvia
LEBANON	Lebanon
LESOTHO	Lesotho
LIBERIA	Liberia
LIBYA	Libya
LIECHTENSTEIN	Liechtenstein
LITHUANIA	Lithuania
LUXEMBOURG	Luxembourg
MACAO	Macao
MACEDONIA	Macedonia
MADAGASCAR	Madagascar
MALAWI	Malawi
MALAYSIA	Malaysia
MALDIVES	Maldives
MALI	Mali
MALTA	Malta
MARSHALL_ISLANDS	Marshall Islands
MARTINIQUE	Martinique (French Antilles)
MAURITANIA	Mauritania
MAURITIUS	Mauritius
MAYOTTE	Mayotte
MEXICO	Mexico
MICRONESIA	Micronesia (F.S. of Polynesia)
MIDWAY_ISLANDS	Midway Islands
MOLDOVA	Moldova
MONACO	Monaco
MONGOLIA	Mongolia
MONTENEGRO	Montenegro
MONTSERRAT	Montserrat

Value	Status
MOROCCO	Morocco
MOZAMBIQUE	Mozambique
MYANMAR	Myanmar (Burma)
NAMIBIA	Namibia (former South-West Africa)
NAURU	Nauru
NEPAL	Nepal
NETHERLANDS	Netherlands
NETHERLANDS_ANTILLES	Netherlands Antilles
NEW_CALEDONIA	New Caledonia
NEW_ZEALAND	New Zealand
NICARAGUA	Nicaragua
NIGER	Niger
NIGERIA	Nigeria
NIUE	Niue
NORFOLK_ISLAND	Norfolk Island
NORTH_KOREA	North Korea
NORTH_MARIANA_ISLANDS	North Mariana Islands (Saipan)
NORWAY	Norway
OMAN	Oman
PAKISTAN	Pakistan
PALAU	Palau
PALESTINIAN_TERRITORY	Palestinian Territory
PANAMA	Panama
PAPUA_NEW_GUINEA	Papua New Guinea
PARAGUAY	Paraguay
PERU	Peru
PHILIPPINES	Philippines
PITCAIRN	Pitcairn
POLAND	Poland
PORTUGAL	Portugal (includes Azores)
PUERTO_RICO	Puerto Rico
QATAR	Qatar

Value	Status
REUNION	Reunion (France)
ROMANIA	Romania
RUSSIA	Russia
RWANDA	Rwanda (Rwandese Republic)
SAINT_KITTS_AND_NEVIS	Saint Kitts and Nevis
SAINT_LUCIA	Saint Lucia
SAINT_MARTIN	Saint Martin
SAINT_VINCENT_AND_THE_GRENADINES	Saint Vincent and the Grenadines
SAN_MARINO	San Marino
SAO_TOME_AND_PRINCIPE	Sao Tome and Principe
SAUDI_ARABIA	Saudi Arabia
SENEGAL	Senegal
SERBIA	Serbia, Republic of
SEYCHELLES	Seychelles
SIERRA_LEONE	Sierra Leone
SINGAPORE	Singapore
SLOVAKIA	Slovakia
SLOVENIA	Slovenia
SOLOMON_ISLANDS	Solomon Islands
SOMALIA	Somalia
SOUTH_AFRICA	South Africa
SOUTH_GEOGRAPHY_AND_THE_SOUTH_SANDWICH_ISLANDS	South Georgia and the South Sandwich Islands
SPAIN	Spain (including Balearic Islands)
SRI_LANKA	Sri Lanka
ST_HELENA	St. Helena
ST_PIERRE	St. Pierre &(et) Miquelon (France)
SUDAN	Sudan
SURINAME	Suriname
SVALBARD_AND_JAN_MAYEN	Svalbard and Jan Mayens
SWAZILAND	Swaziland

Value	Status
SWEDEN	Sweden
SWITZERLAND	Switzerland
SYRIAN_ARAB_REPUBLIC	Syrian Arab Republic (Syria)
TAHITI	Tahiti (French Polynesia)
TAIWAN	Taiwan
TAJIKISTAN	Tajikistan
TANZANIA	Tanzania (includes Zanzibar)
THAILAND	Thailand
TIMOR-LESTE	Timor-Leste
TOGO_TOGOLESE_REPUBLIC	Togo (Togolese Republic)
TOKELAU	Tokelau
TONGA	Tonga
TRINIDAD_AND_TOBAGO	Trinidad and Tobago
TUNISIA	Tunisia
TURKEY	Turkey
TURKMENISTAN	Turkmenistan
TURKS_AND_CAICOS_ISLANDS	Turks and Caicos Islands
TUVALU	Tuvalu (Ellice Islands)
UGANDA	Uganda
UKRAINE	Ukraine
UNITED_ARAB_EMIRATES	United Arab Emirates
UNITED_STATES_MINOR_OUTLYING_ISLANDS	United States Minor Outlying Islands
UNITED_KINGDOM	United Kingdom
URUGUAY	Uruguay (East Republic)
UNITED_STATES	United States
UZBEKISTAN	Uzbekistan
VANUATU	Vanuatu (New Hebrides)
VATICAN_CITY	Vatican City
VENEZUELA	Venezuela
VIETNAM	Vietnam
VIRGIN_ISLANDS_BRITISH	Virgin Islands British

Value	Status
VIRGIN_ISLANDS_US	Virgin Islands US
WALLIS_AND_FUTUNA	Wallis and Futuna
WESTERN_SAHARA	Western Sahara
WESTERN_SAMOA	Western Samoa
YEMEN_ARAB_REPUBLIC	Yemen Arab Republic (North Yemen)
YUGOSLAVIA	Yugoslavia
ZAIRE	Zaire (former Republic of the Congo)
ZAMBIA	Zambia
ZIMBABWE	Zimbabwe

## Roles

KEY	VALUE
REVIEWER	reviewer
PREVIEWER	previewer
PUBLISHER	publisher
MANAGER_LTD	manager ltd
MANAGER	manager
REVIEWER_PLUS	reviewer+
PUBLISHER_PLUS	publisher+
HIDDEN_MANAGER_PLUS	(manager+)
MANAGER_PLUS	manager+
WS_ADMIN	ws_admin

## Title

Value	Industry
ANALYST	Analyst
ASSISTANT_SUPPORT_STAFF	Assistant / Support Staff
ASSOCIATE	Associate
BOARD_MEMBER	Board Member
CHAIRMAN_PRESIDENT_CEO	Chairman / President / CEO
C_LEVEL_OTHER	C-Level (Other)
COMPLIANCE_OFFICER	Compliance Officer
CONTROLLER_TREASURER	Controller / Treasurer
DOCTOR_PHYSICIAN	Doctor / Physician
ENGINEER_RESEARCHER_SCIENTIST	Engineer / Researcher / Scientist
GC_OTHER_COUNSEL	GC / Other Counsel
GENERAL_MANAGER	General Manager
MANAGER_SUPERVISOR	Manager / Supervisor
MANAGING_DIRECTOR_DIRECTOR	Managing Director / Director
OTHER	Other
PARTNER	Partner
PROJECT_MANAGER	Project Manager

<b>Value</b>	<b>Industry</b>
TRADER	Trader
UNAVAILABLE	Unavailable
VP_SVP_EVP	VP / SVP / EVP

## Functional Area

<b>Value</b>	<b>Industry</b>
ASSET_BACKED_SECURITIES	Asset Backed Securities
COMMERCIAL_LOANS	Commercial Loans
COMPLIANCE_RISK_REGULATORY_AFFAIRS	Compliance / Risk / Regulatory Affairs
CONSULTING_ADVISORY	Consulting / Advisory
CORPORATE_DEVELOPMENT_PARTNERSHIPS	Corporate Development/Partnerships
CUSTOMER_SERVICE	Customer Service
FINANCE_INTERNAL	Finance (Internal)
HEDGE_FUND	Hedge Fund
HUMAN_RESOURCES	Human Resources
INFORMATION TECHNOLOGY	Information Technology
INSTITUTIONAL_INVESTING	Institutional Investing
INVESTMENT_BANKING	Investment Banking
LAW_FIRM_LITIGATION	Law Firm - Litigation
LAW_FIRM_MA	Law Firm - M&A
LAW_FIRM_OTHER	Law Firm - Other
LEGAL_IN_HOUSE	Legal (In-House)
LOAN_SYNDICATION_SERVICING	Loan Syndication & Servicing
OPERATIONS	Operations
PRIVATE_EQUITY	Private Equity
PROCUREMENT	Procurement
RESEARCH_AND_DEVELOPMENT	Research and Development
SALES_AND_MARKETING	Sales and Marketing
UNAVAILABLE	Unavailable (User opts not to specify)

## Industry

Value	Industry
ADVERTISING_MARKETING_PR	Advertising/Marketing PR
AEROSPACE	Aerospace
AGRICULTURE_CHEMICALS_FOREST_PRODUCTS	Agriculture/Chemicals/Forest Products
AUTOMOTIVE	Automotive
BUSINESS_PROFESSIONAL_SERVICES	Professional Services
CONSUMER_GOODS	Consumer Goods
EDUCATION	Education
ENERGY_UTILITIES	Energy Utilities
FINANCIAL_SERVICES	Financial Services
GOVERNMENT_MILITARY_PUBLIC_SERVICE	Government/Military/Public
HEALTHCARE_MEDICAL	Healthcare
HOSPITALITY_RECREATION	Hospitality/Recreation
INSURANCE	Insurance
MANUFACTURING_CONSTRUCTION_INDUSTRIALS	Manufacturing/Construction/Industrial
MEDIA_PUBLISHING_ENTERTAINMENT	Media/Publishing/Entertainment
METALS_MINING	Metals/Mining
OTHER	Other
PHARMACEUTICALS_BIOTECHNOLOGY	Pharmaceuticals/Biotechnology
REAL_ESTATE	Real Estate
RETAIL	Retails
SUSTAINABILITY	Sustainability
TECHNOLOGY_COMPUTERS_ELECTRONICS	Technology/Computers/Electronics
TELECOMMUNICATIONS_NETWORKING	Telecommunications/Networking
TRAVEL_TRANSPORTATION	Travel/Transportation
UNAVAILABLE	Unavailable

## TimeZone

Use the Time Zones Chart to refer to the time zone mentioned in the Response/Request XML

of any API.

Name	ID	Description	The Hours from GMT
ACST	34	Australian Central Standard Time	GMT+9.5
ACDT	35	Australian Central Daylight Time	GMT+10.5
CST	1	Central Standard Time	GMT-06
EST	2	Eastern Standard Time	GMT-05
MST	3	Mountain Daylight Time	GMT-07
BuenosAires	5		GMT-03
PST	6	Pacific Standard Time	GMT-08
YST	7		GMT-09
AHST, EAST	8		GMT-10
GMTMinus12	9		GMT-12
NT	10		GMT-11
AST, EDT	17		GMT-04
AT	18		GMT-02
GMT	19	Greenwich Mean Time	GMT
CET	20		GMT+01
EET	21		GMT+02
BT	22		GMT+03
ZP4	23		GMT+04
ZP5	24		GMT+05
ZP6	25		GMT+06
WAST	26		GMT+07
CCT	27		GMT+08
JST	28		GMT+09
GST	29		GMT+10
GMTPlus11	30		GMT+11
NZST	31		GMT+12
WAT	32		GMT+01
NZST2	34L		GMT+13