InteliNotion

Application Admin Guide

For InteliNotion Version: 2024.GR2.0

Last Modified: November 2024

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1. ABOUT THIS GUIDE

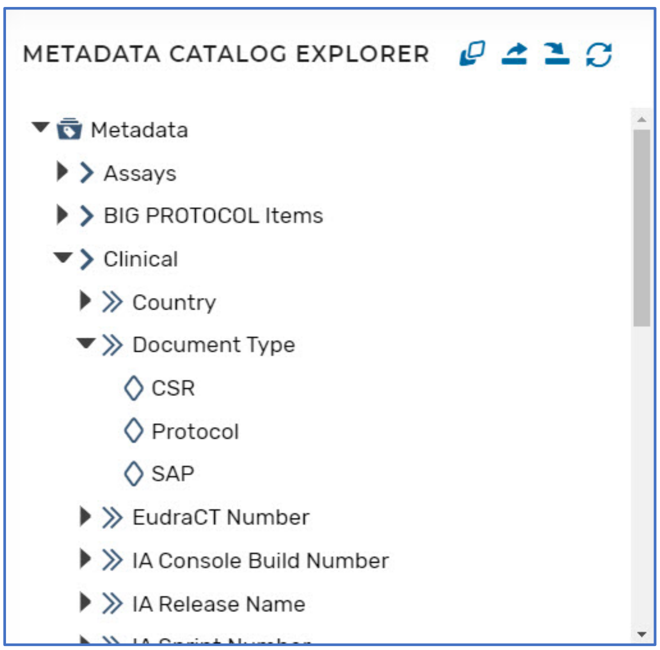
This guide provides information and instructions for administrators [admins] who have ‘full control’ access in the *InteliNotion* application so they can apply and manage various backend configurations therein. The additional configurations needed to support authoring functionality can be found in the **InteliNotion Authoring Configurations Guide**.

2. CONFIGURING METADATA

The metadata catalog is a central place to manage metadata, which is used to describe documents and components, enabling easy search and business rules for content reuse. Metadata values can also be configured to function as content within a document (see Section 3 of the **InteliNotion Administration Configurations Guide** for details).

The metadata are structured as follows:

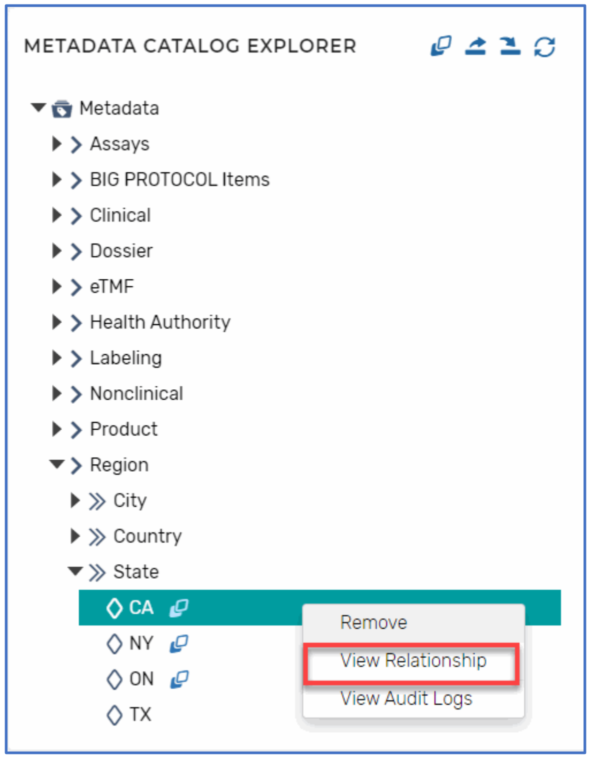
- **Metadata Catalog**
    - **Category** – can be used to group subcategories (eg, Global, Clinical, Product, etc.)
        - Subcategory - equivalent to metadata property or parameter (eg, study ID, product name, country), and may include a subcategory within a subcategory
            - **Value** – permissible values for a specific subcategory (eg, ABC123, XYZ567, etc.)



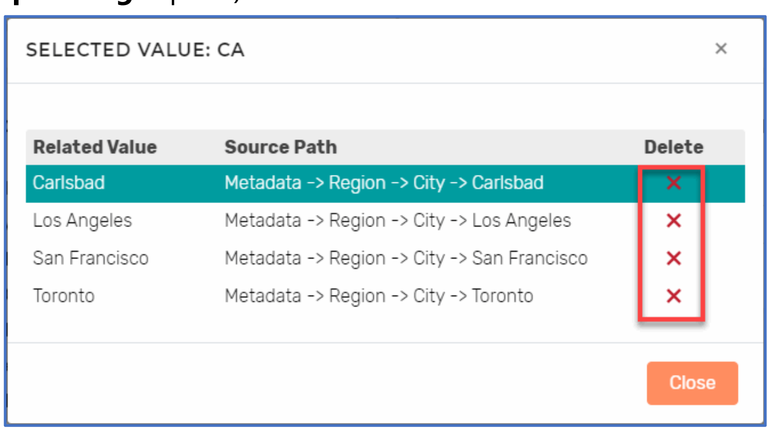
Note: The following steps describe how to manually add, modify, and remove metadata within *InteliNotion*. Additional instructions for how metadata may be sourced directly from another system, utilization of the **Source** field within the **Add Subcategory** and **Edit Subcategory** forms will be covered in a separate guide.

2.1 EDITING AND DELETING CASCADING METADATA RELATIONSHIPS

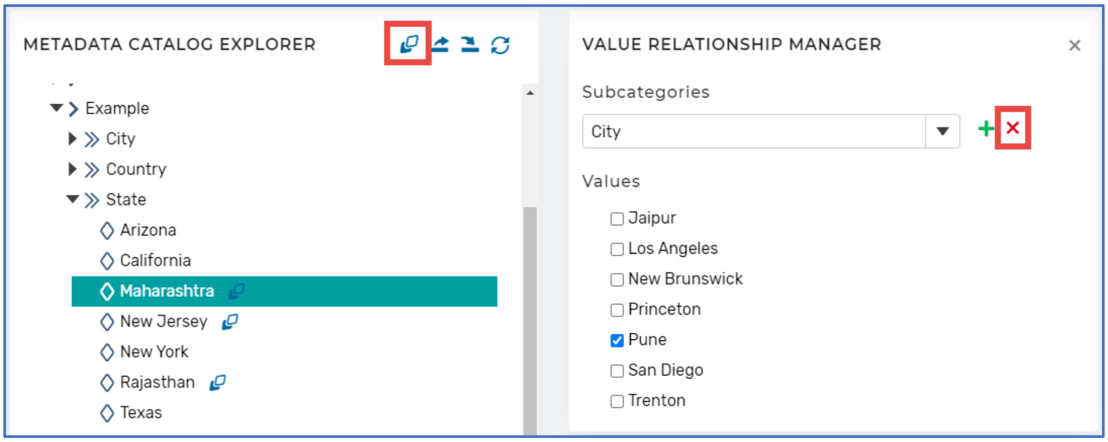
1. The **Value Relationship Manager icon** identifies a metadata value that has a relationship configured in the system. To view all relationships for a specific value, right-click on it and select **View Relationship**.



2. To remove a specific **Related Value** relationship, click the **close icon** at the end of the row (a relationship value can also be removed by unselecting the item in the **Value Relationship Manager** pane).

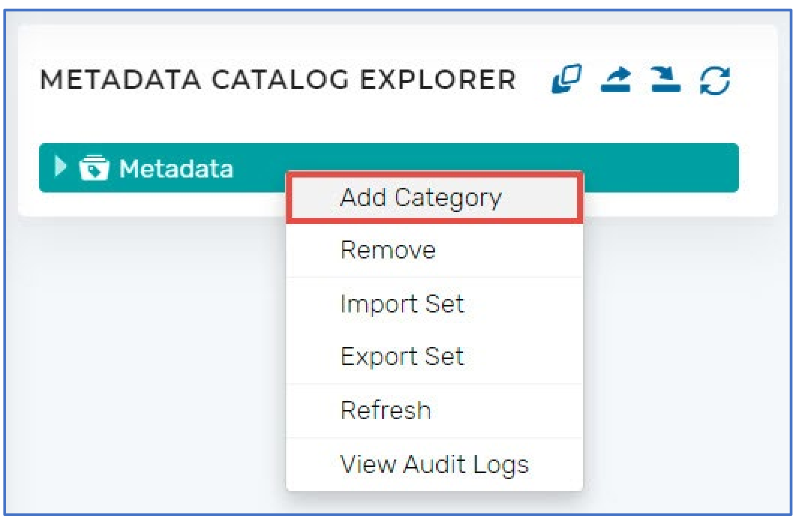


3. To permanently remove an entire relationship between 2 subcategories, click the relevant subcategory value, then click the **Value Relationship Manager icon** to open the related pane (if not currently displayed), and click the ✖ next to the previously selected subcategory.

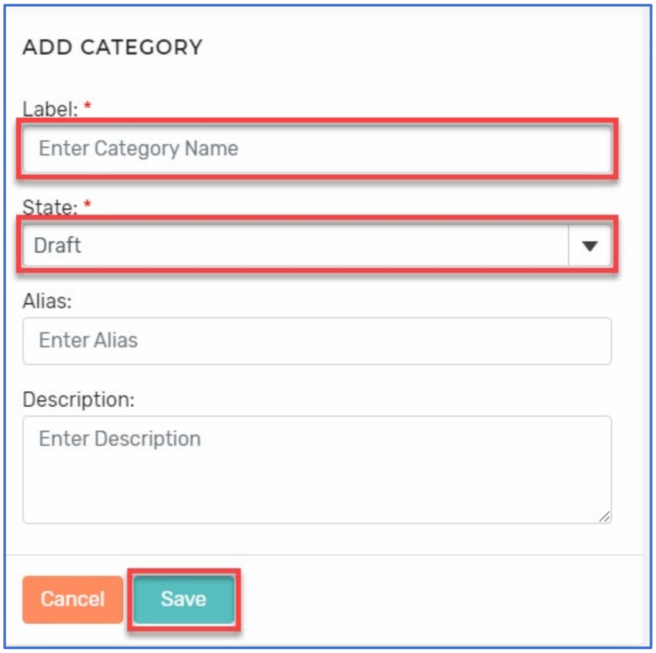


2.2 ADDING, UPDATING, AND DELETING METADATA

1. Click the **Metadata** option in the left-hand navigation pane of the *Web Console*.
2. If no metadata catalog exists yet, click the **add icon** + to create a new one.
3. To insert a category, subcategory, or value, right-click on the parent object and click **Add** [item type].

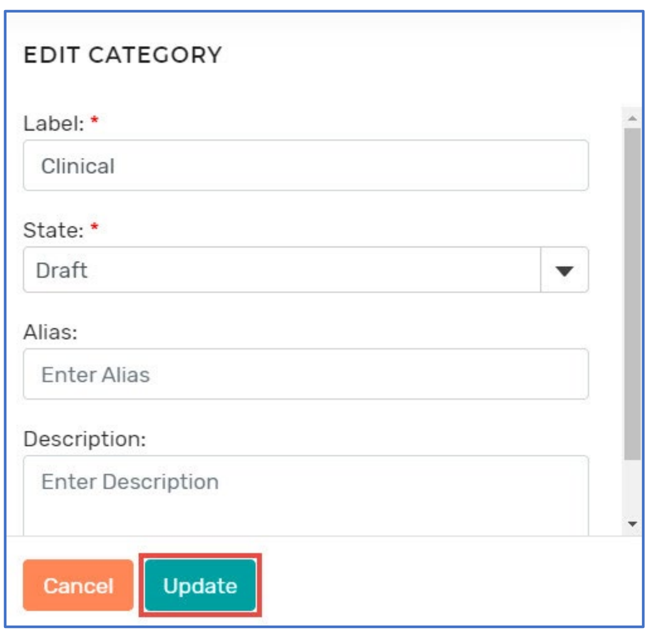


4. Enter the required information in the form. The following special characters are not allowed in the **Label**: \, /, :, *, ?, <, >, |. Click **Save**.

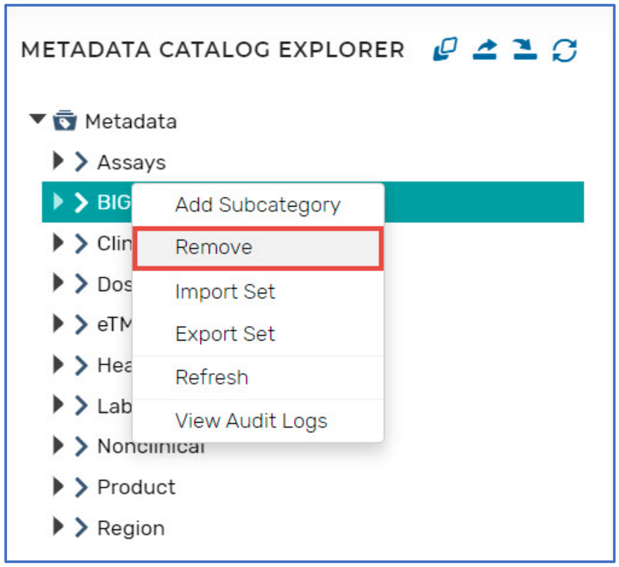


<u>Note:</u> If a category has been bound to an object, it cannot be removed.

5. To update an existing item, click on it, update the information in the form, and click **Update**.



6. To remove an item, right-click on it and click **Remove**.



- To remove an item without a disruption in catalogue relationships, the following conditions must be met:
  - The item must have no related subcategories.
  - The item must have no related configurations that would result in referential integrity error if the business object class was removed.
  - _IF_ the user chooses to delete an object with related subcategories, a warning message will display recommending the user update the related configurations, listed in the warning.

Note: An item using an instantiated object, even if it is located in the recycle bin, cannot be deleted

2.3 CREATING CASCADING METADATA VALUES

2.3.1 Overview

A cascading metadata relationship allows the user to select from a set of values that are filtered based on a preconfigured relationship to another previously selected value.

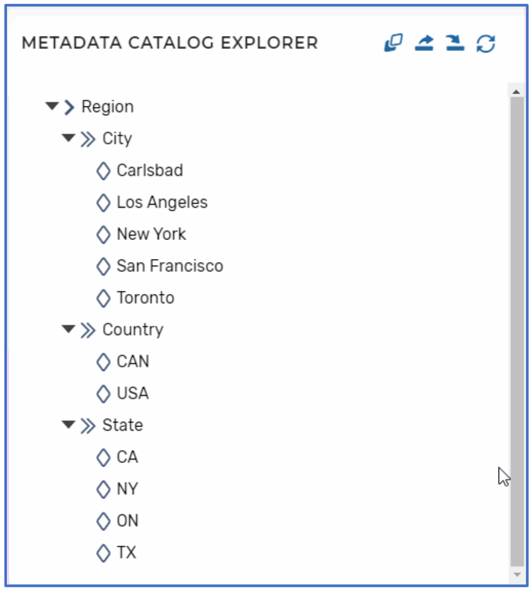
These cascading filters can then be configured to be used for business objects (see Section 3), to limit the available choices for another given property value.

For example, once a country is selected, only the states for that country will be available for selection; thereafter, once a state is selected, only the cities for that state will be available for selection.

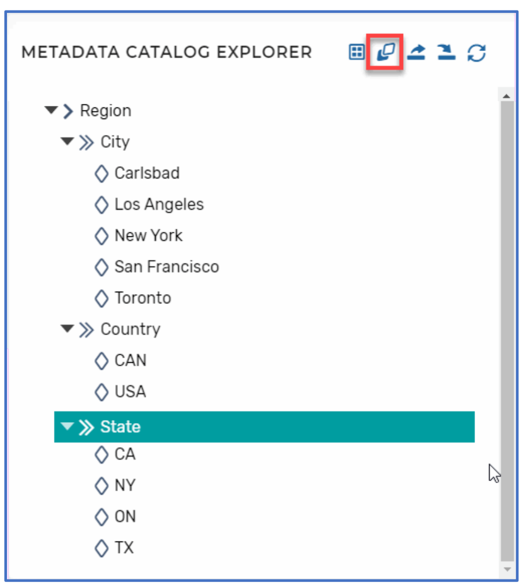
2.3.2 Configuring Cascading Metadata Relationships

The following steps outline how to configure a metadata relationship.

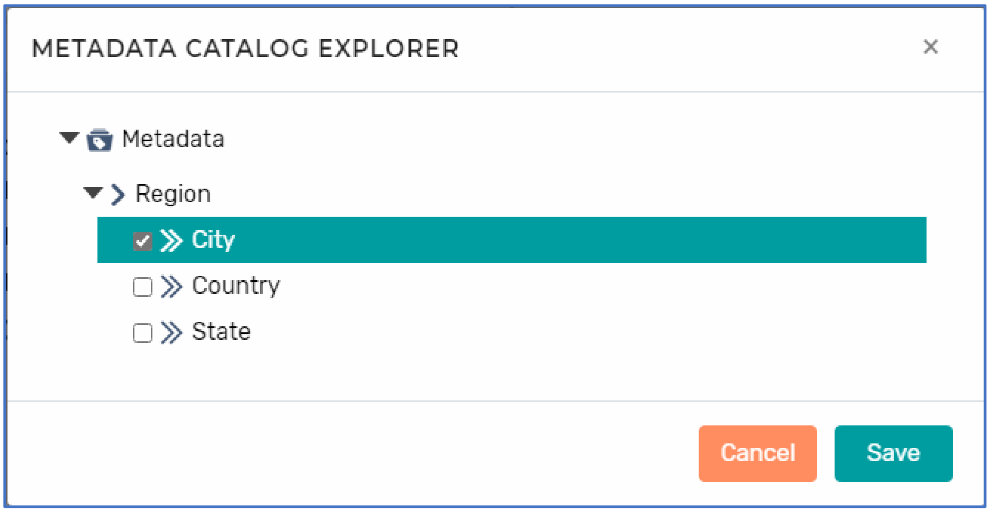
1. Click the **Metadata** option in the left-hand navigation pane of the *Web Console*.
2. Add 3 subcategories in the **Metadata Catalog Explorer** (eg, **City**, **Country**, **State**), and add multiple values under each of them.



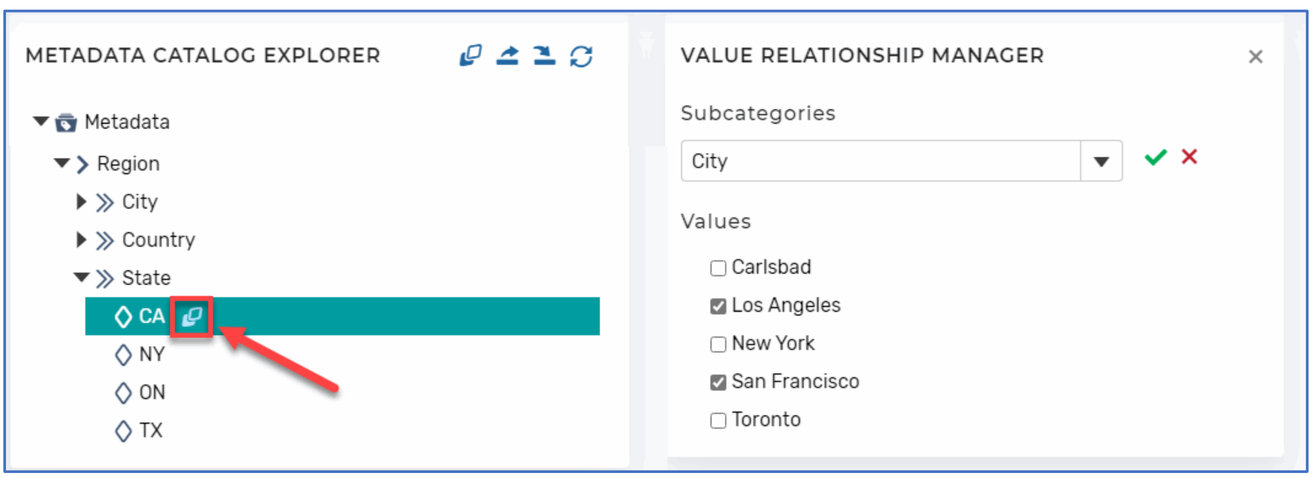
3. To relate the city values to the relevant state, click on a **State** to select it (eg, New Jersey), and click the **Value Relationship Manager icon**. The **Value Relationship Manager** pane will open.



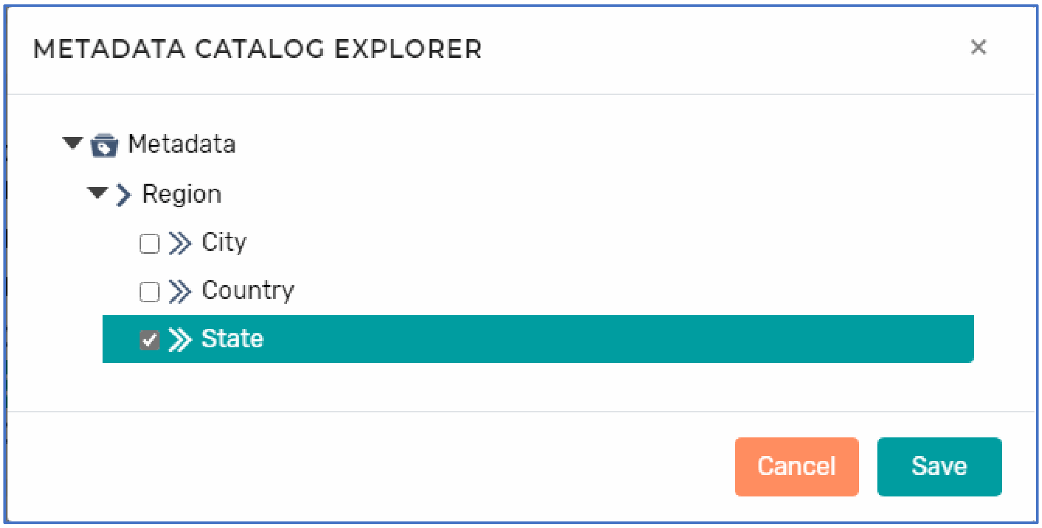
4. In the **Value Relationship Manager** pane, click the **check mark icon** , navigate to and select the city subcategory from the **Metadata Catalog Explorer** pop-up window, and click **Save**.



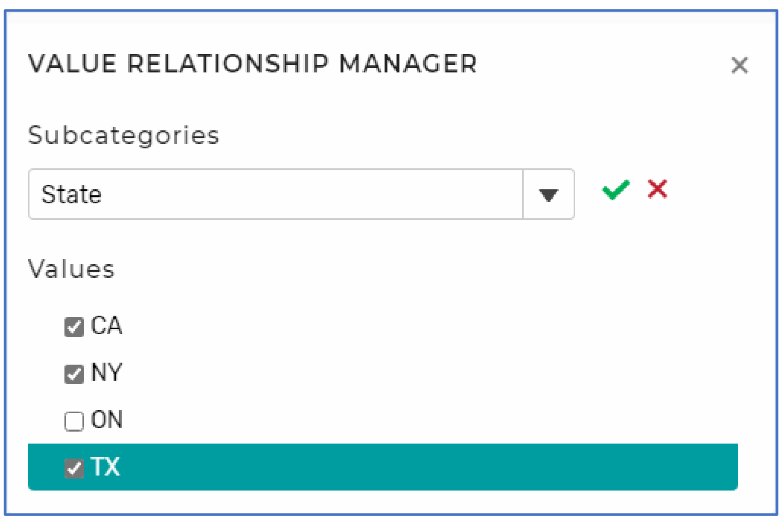
5. The available values for the selected city subcategory will be listed in the **Value Relationship Manager** pane. Select the city values that are to be associated with the state subcategory previously chosen. After at least 1 state value - city value relationship is configured, a new icon will appear next to the selected state value.



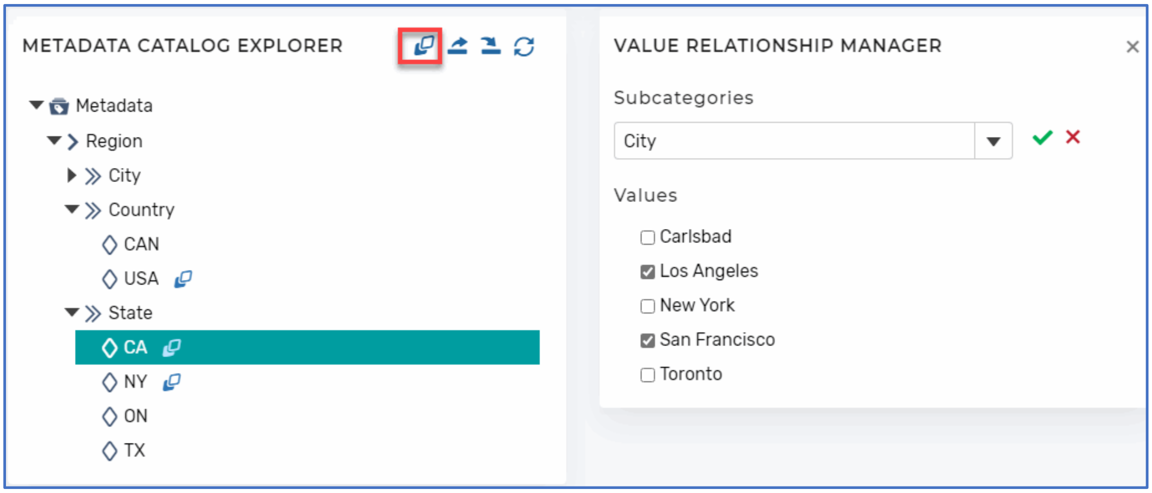
6. To establish the relationship between state values and a specific country value, click on the relevant country value to select it (eg, USA) and click the **Value Relationship Manager icon**. Next, click the **plus sign icon** in the **Value Relationship Manager** pane, then navigate to and select the subcategory of state from the **Metadata Catalog Explorer** pop-up window, and click **Save**.



7. Select the corresponding state values that are to be associated with the country subcategory previously chosen.

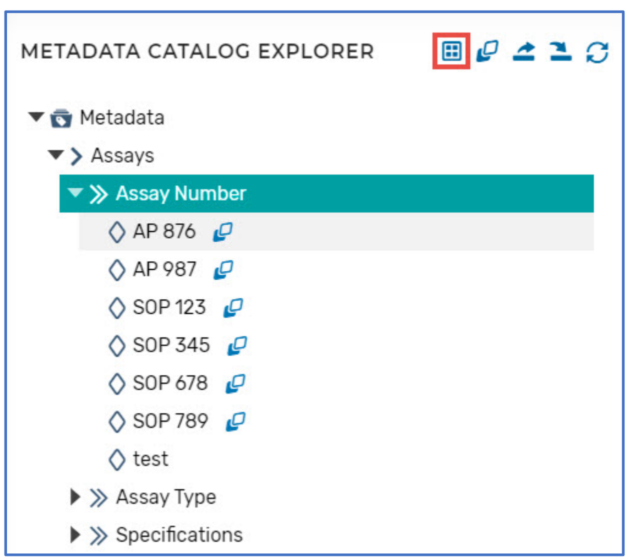


8. After the initial relationship has been established between the selected values for the 3 subcategories (**Country**, **State**, and **City**), additional values can be added by first clicking on the relevant country or state value (ie, the one that displays the **Value Relationship Manager icon** to the right of its name), then clicking the **Value Relationship Manager icon** at the top of the **Metadata Catalog Explorer** page and selecting other values that are listed automatically.

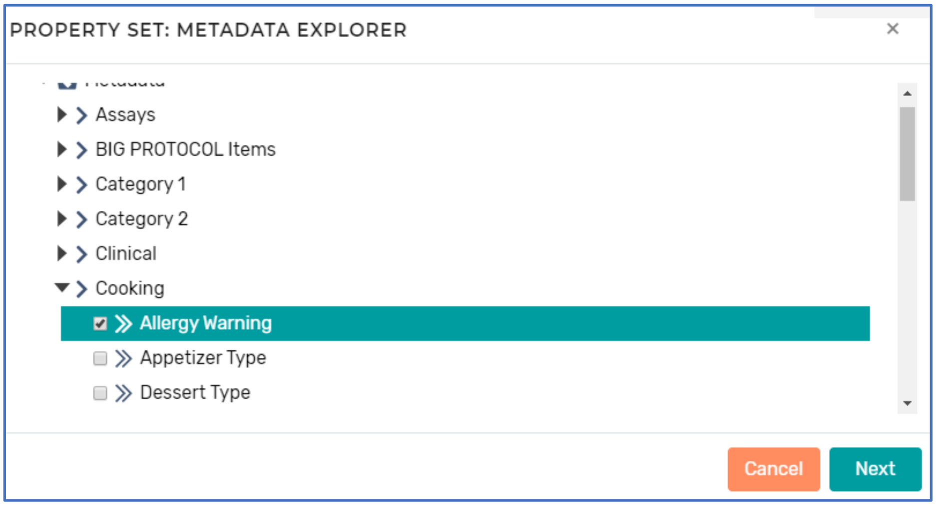


2.3.3 Configuring the Property Set

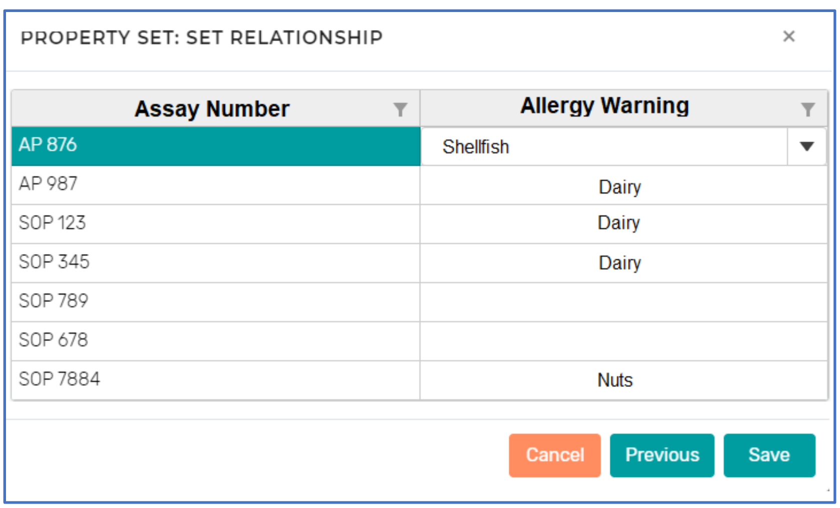
Defining a property set will allow users to be able to configure the property set from the action provided. This option will be enabled only if the user has selected the subcategory as shown below.



9. The selected subcategory will be referred to as **Parent Subcategory**. Once the user clicks on the action, it will open the popup window, which will allow the user to select one or more other subcategories in any catalog. The parent subcategory option will be disabled, and the user will not be allowed to select the same subcategory.



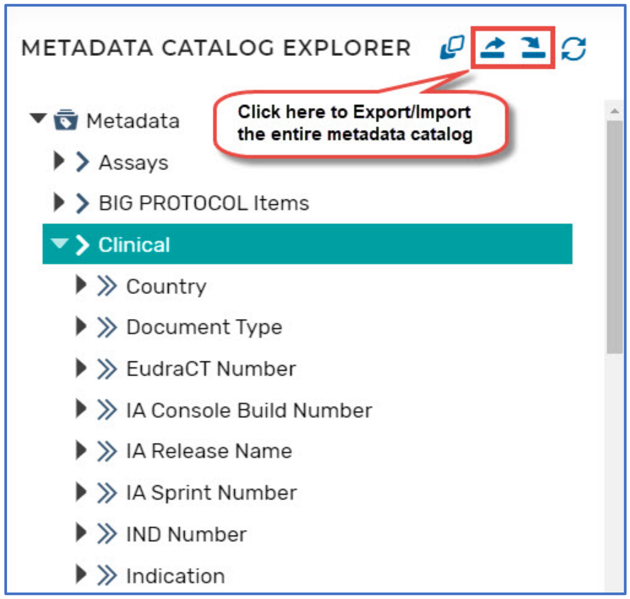
10. If the user clicks on the property set for which the **Subcategories** are already mapped, then those values should be selected.
11. When the user clicks **Next** it will show the grid view in which parent and related subcategories are displayed. All values in the parent subcategory are displayed in the row, which will allow the user to associate the other related values.



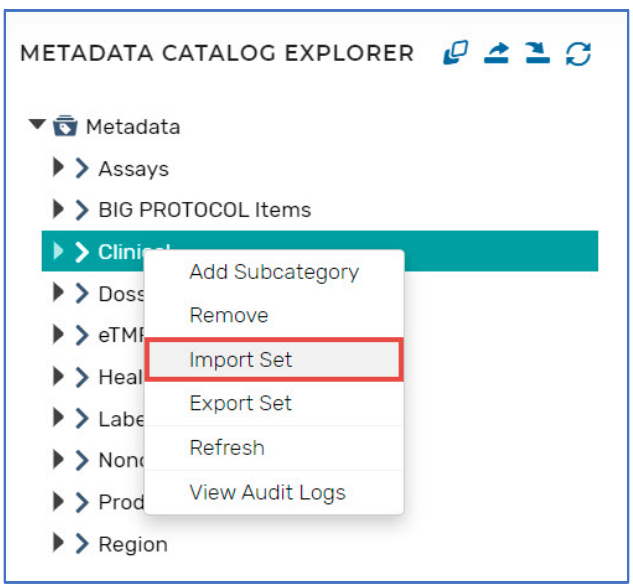
12. The other related values will be displayed in the dropdowns, which will allow the user to map the parent value with other subcategory values. If the user deselects the subcategory, it will delete the mapping for the selected subcategory.

2.4 EXPORTING AND IMPORTING METADATA

1. To export or import the entire metadata catalog, use the icons shown below at the top-right corner.

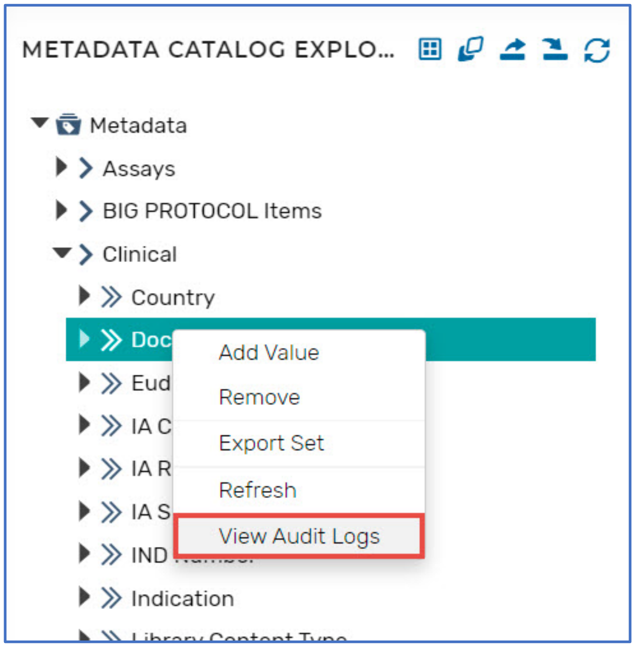


2. To export or import a single category or subcategory, right-click on it and then click either **Import Set** or **Export Set**, as appropriate.



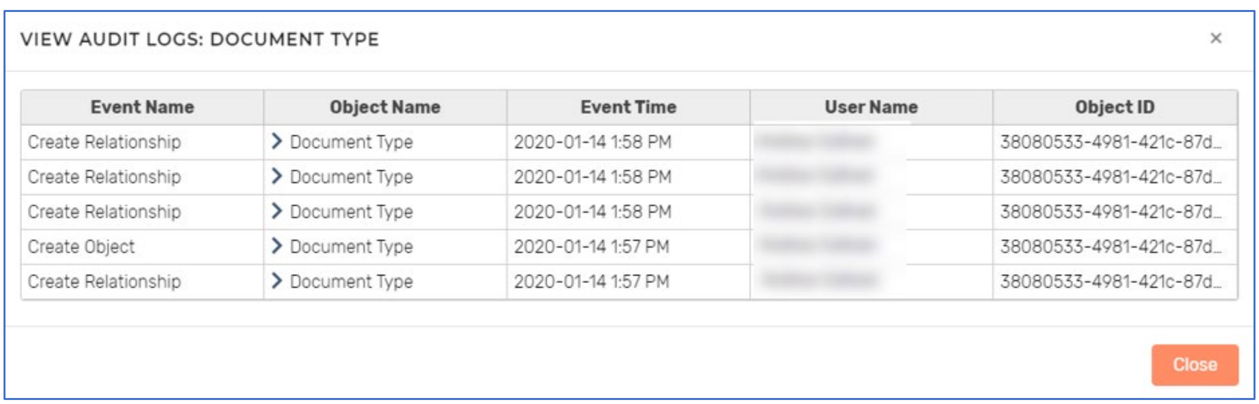
2.5 METADATA AUDIT LOGS

Metadata actions performed in the system will be audited automatically. To view the audit logs, right-click on any item in the metadata catalog's hierarchical tree and click **View Audit Logs**.



The following events will create an audit log event for the Metadata Catalog:

- Metadata import
- Metadata catalog creation, update, or deletion
- Metadata category, subcategory or value creation, update, and delete subcategory

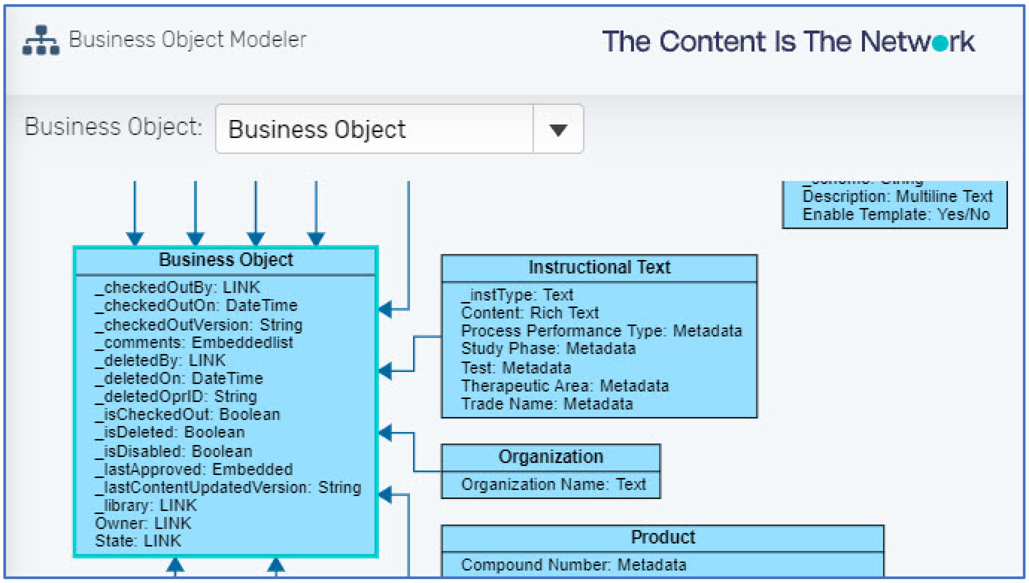


Event Name	Object Name	Event Time	User Name	Object ID
Create Relationship	Document Type	2020-01-14 1:58 PM		38080533-4981-421c-87d...
Create Relationship	Document Type	2020-01-14 1:58 PM		38080533-4981-421c-87d...
Create Relationship	Document Type	2020-01-14 1:58 PM		38080533-4981-421c-87d...
Create Object	Document Type	2020-01-14 1:57 PM		38080533-4981-421c-87d...
Create Relationship	Document Type	2020-01-14 1:57 PM		38080533-4981-421c-87d...

3. CONFIGURING THE BUSINESS OBJECT MODEL

The object model contains domain-specific business object [classes] (eg, **Document**, **Component**, **Instructional Text**) along with their definition and behavior (eg, associated properties, lifecycle).

Note: Some objects cannot be modified because they are system generated.

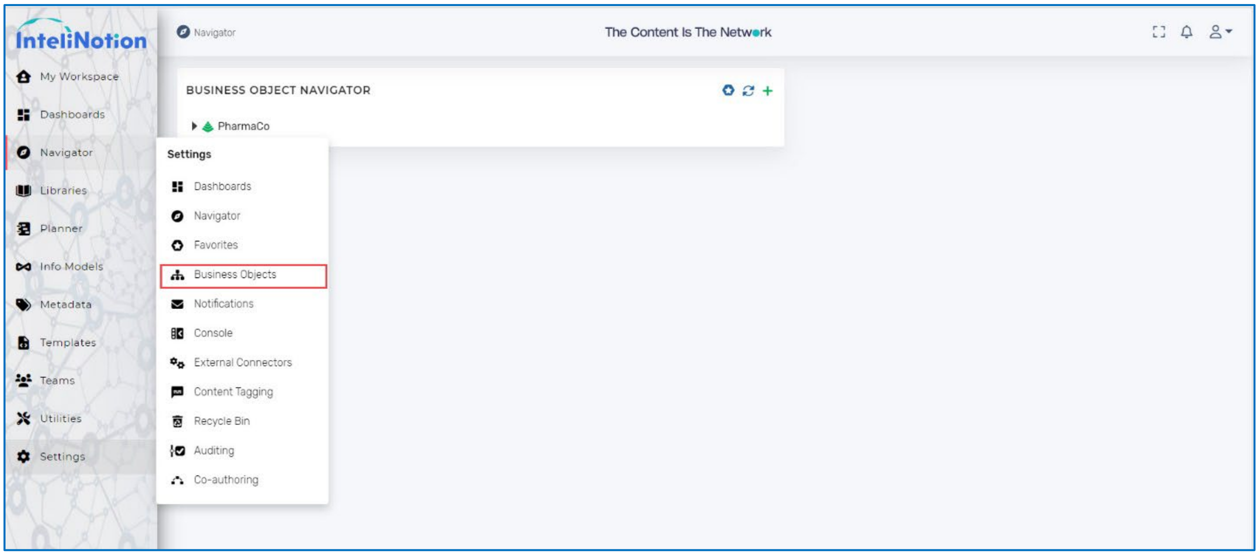


The structure of the business object model is as follows:

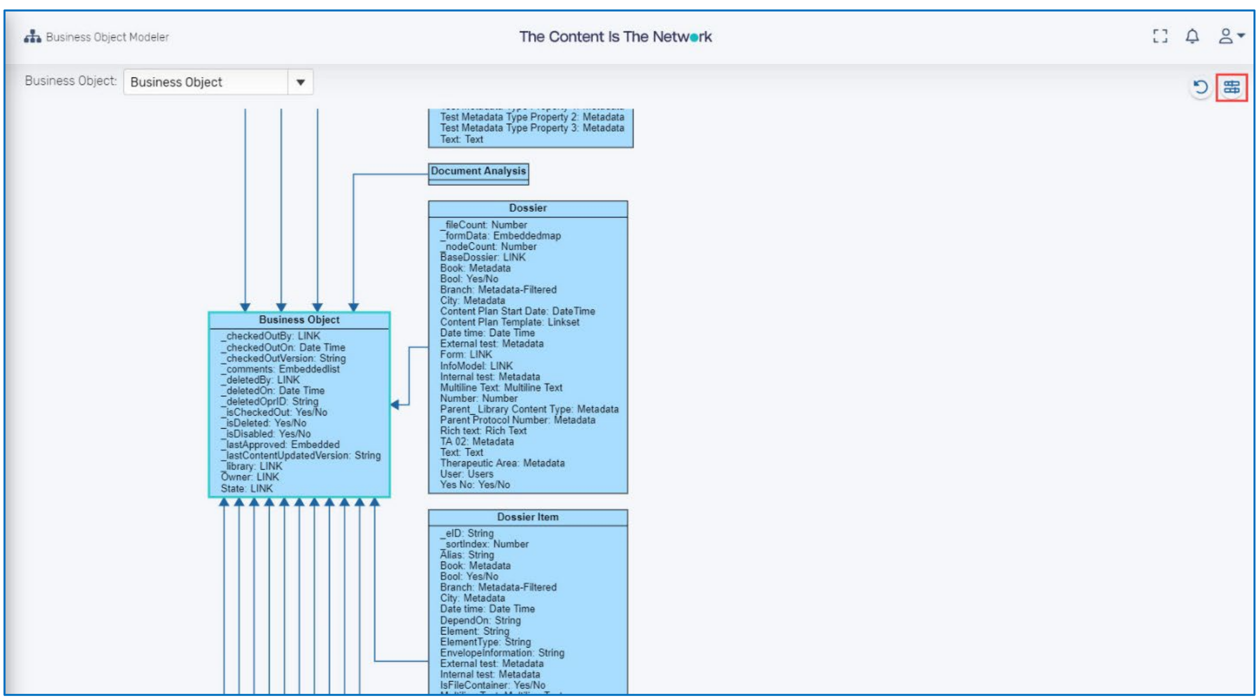
- Business object [class]
  - Other business object [class or subtype]

3.1 SETTING UP THE DEFAULT STATE CATALOG

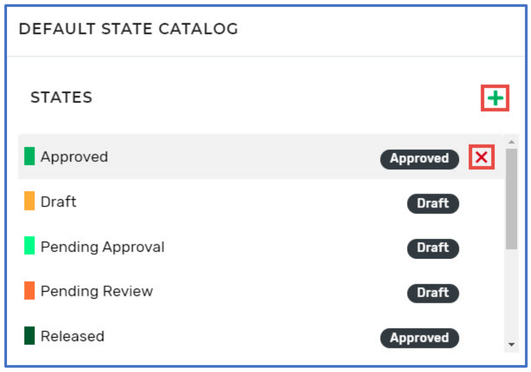
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Business Objects**.



2. Click the icon to add/modify/delete states in the **Default State Catalog** so they are ready to add to a business object.

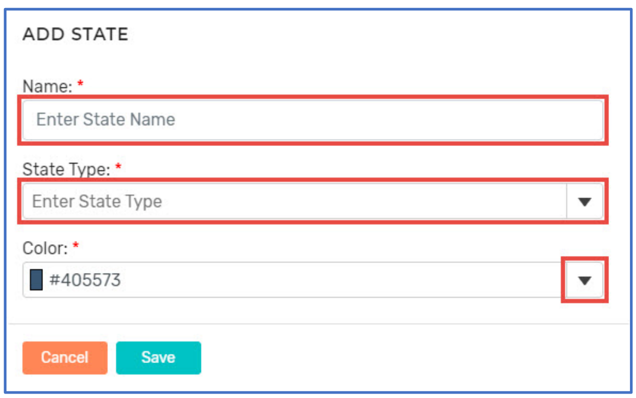


3. Click the **plus sign icon** to add a new state to the catalog, if needed.

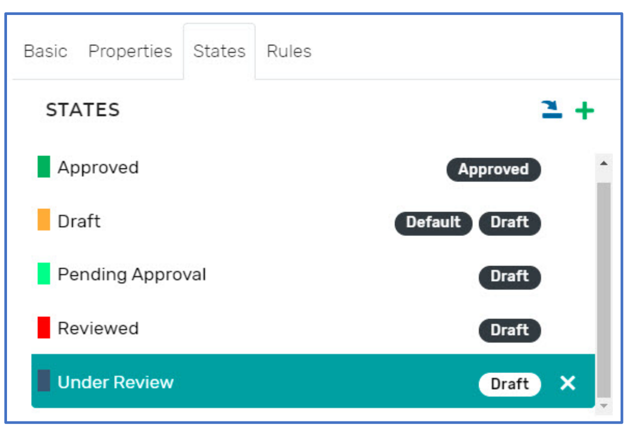


<u>Note:</u> Click on any existing **State** to modify it. Click the **icon** to delete an existing state.

4. Fill out the required **Name** for the State, select the **State Type**, and a color to denote it. Check **Mark as Default State** to make this the default **State** (only 1 **State** can be the default for a business object; this is typically applied to a **Draft State** type).

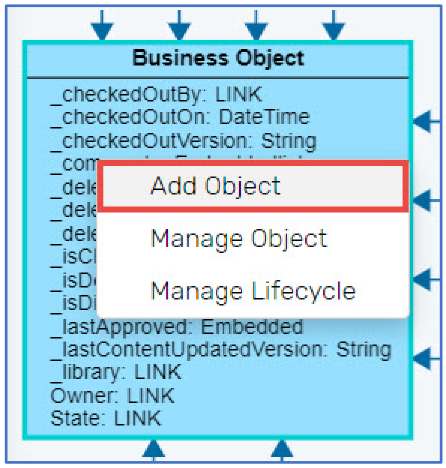


5. The newly added **State** will be visible in the **Default State Catalog**.



3.2 ADDING A BUSINESS OBJECT

To add a new **Business Object**, right-click on an existing parent object (eg, **Business Object**) and click **Add Object**.



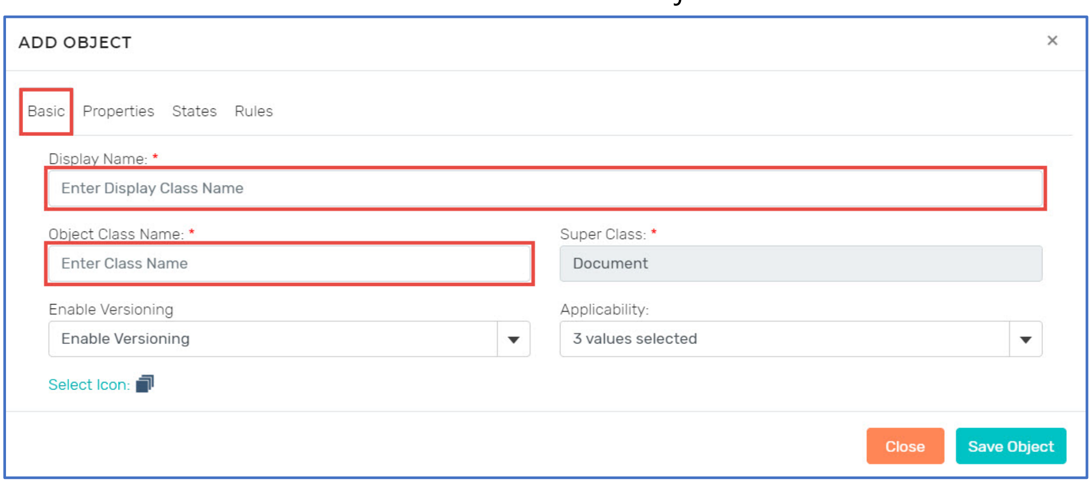
Follow the steps in the subsections below to complete the information for the new business object.

Note: All required information on the Basic Tab must be filled in and a default lifecycle state specified before saving the new business object.

3.2.1 Basic Information

Follow the steps listed below to complete the Basic Tab.

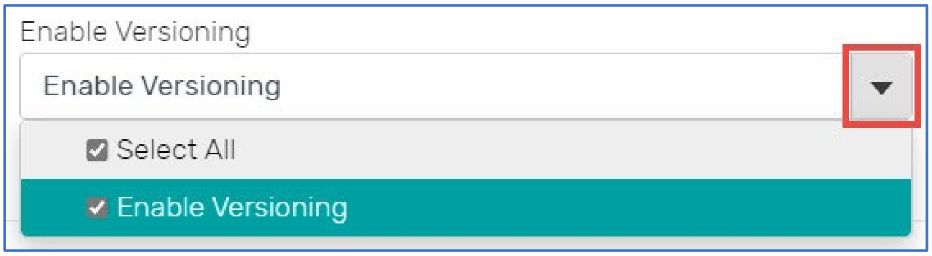
1. Enter a **Display Name** and an **Object Class Name** (it cannot contain any spaces). The **Object Class Name** must be entered and should not be selected from the drop-down list; the same name cannot be used for more than 1 object class.



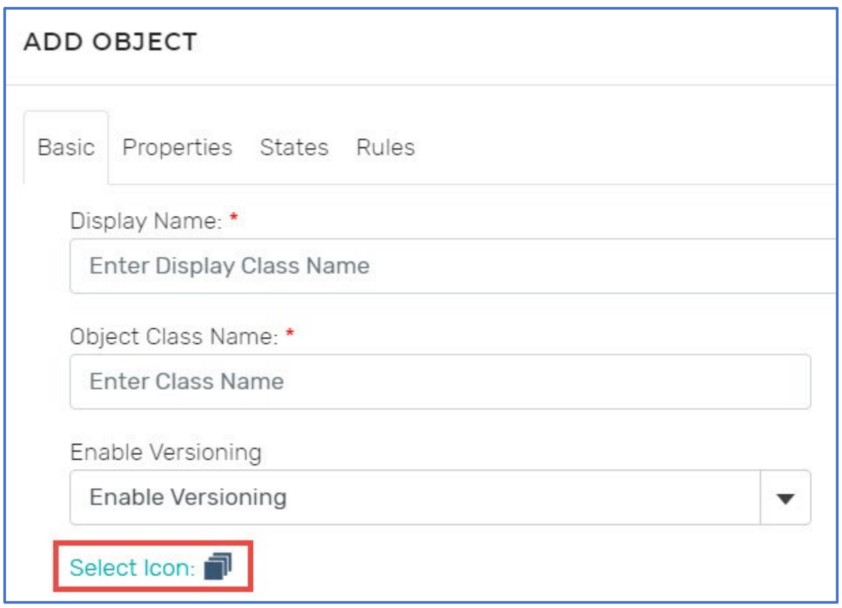
Notes:

- It is recommended to use different object classes for each document type business object to assist in ease of identification.
- Only alphanumeric characters are allowed for the display name, and no spaces are allowed in the object class name.

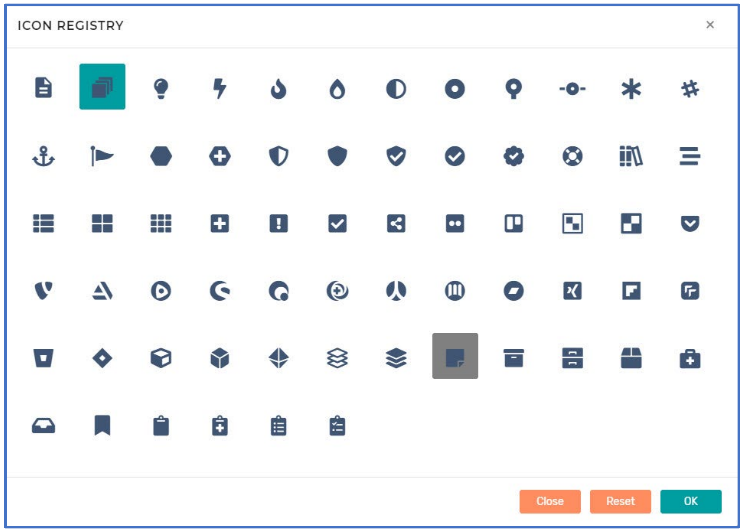
a. Click the **Versioning** drop-down and click to enable.



b. To change the default icon click **Select Icon**.



c. This will open the icon registry page. Choose an icon and click **OK**.



d. Click the **Applicability(s)** drop-down and select the relevant options, which are as follows:

1: Allows a non-managed library to be created for the object type.

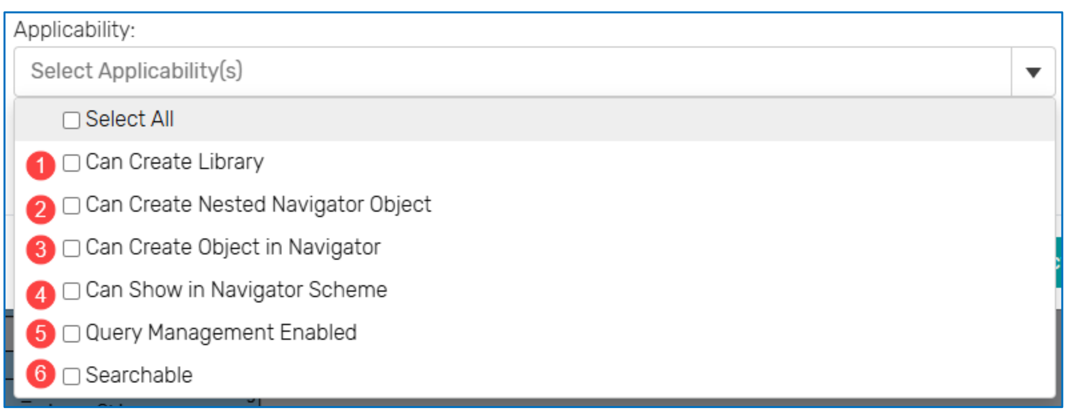
2: Allows nesting objects of the same type within the **Navigation Scheme**.

3: Allows users to enable or disable the business object's ability to create objects in Navigator.

4: Allows the object to display as an option when configuring the **Navigation Scheme**.

5: Allows query creation on that object.

6: Allows the object to be searched for within the system.



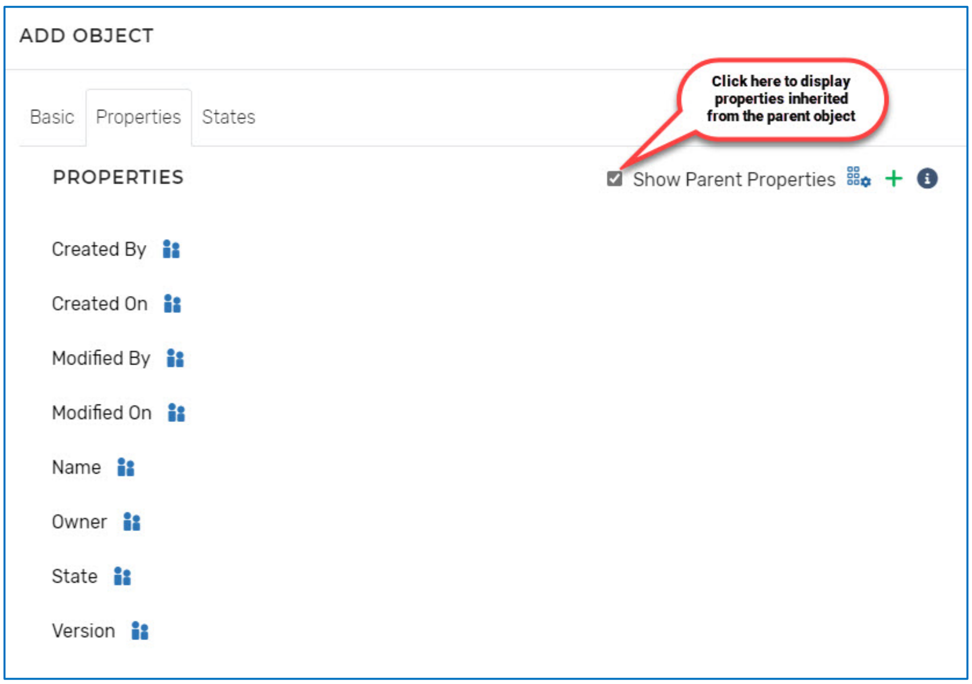
<u>Note:</u> Queries are used for the **Dossier Management** functionality, which is not covered in this guide. Contact **InteliNotion** for further information, if needed.

3.2.2 Properties Information

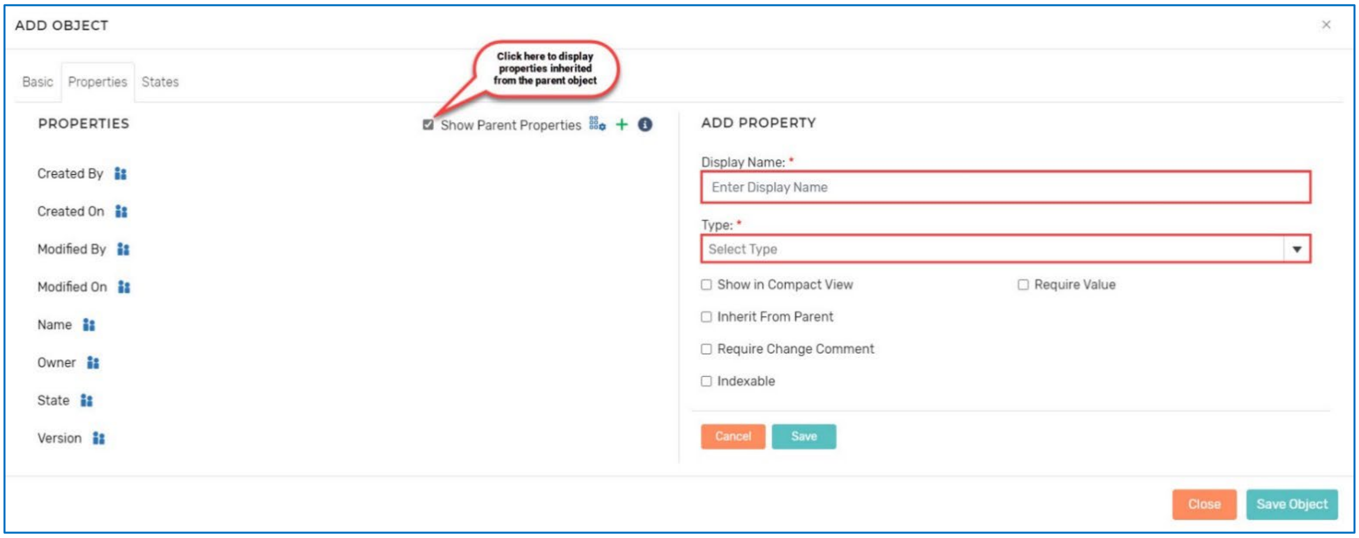
Follow the steps listed below to complete the Properties Tab.

1. Click **Properties**.

> **<u>Note:</u>** If the **Show Parent Properties** box is checked, any inherited properties will be displayed. One of these properties is for the **Owner**, which will have its default value set as the user who creates the object (eg, document). Thereafter, an admin or the current owner will be able to change/reassign the owner of an instantiated object (along with its child objects, if required) to a new user, if/when needed.



2. Click the **add icon** + to add a property.
   a. Enter a **Display Name** (spaces are allowed) and click the **Type** dropdown.



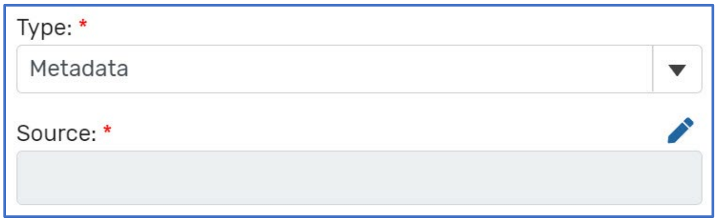
   b. Select the property **Type** from the following values:
      - **Date Time**
      - **Metadata** - used for configuring a metadata-sourced property.
      - **Metadata-Filtered** - used for configuring a metadata-sourced property that has a cascading metadata relationship already established via the metadata configurations (refer to the **InteliNotion Authoring Configurations Guide** for steps on how to configure the cascading metadata relationships in the Metadata Catalog).
      - **Multiline Text**
      - **Number**
      - **Rich Text**
      - **Text**
      - **Users**
      - **Yes/No**

Notes:

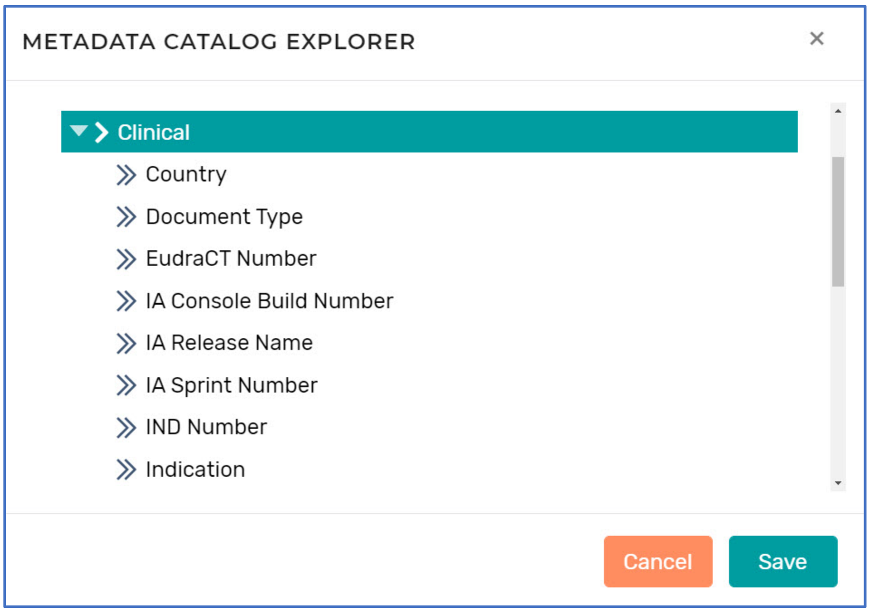
- It is recommended to limit the number of total properties to 1000.
- The Display Name must contain alphanumeric numbers and cannot start with a numeric number.

   c. For **Metadata** and **Metadata-Filtered** types only: Specify the **Source** for the property as follows:

i. Click the **Edit icon** .



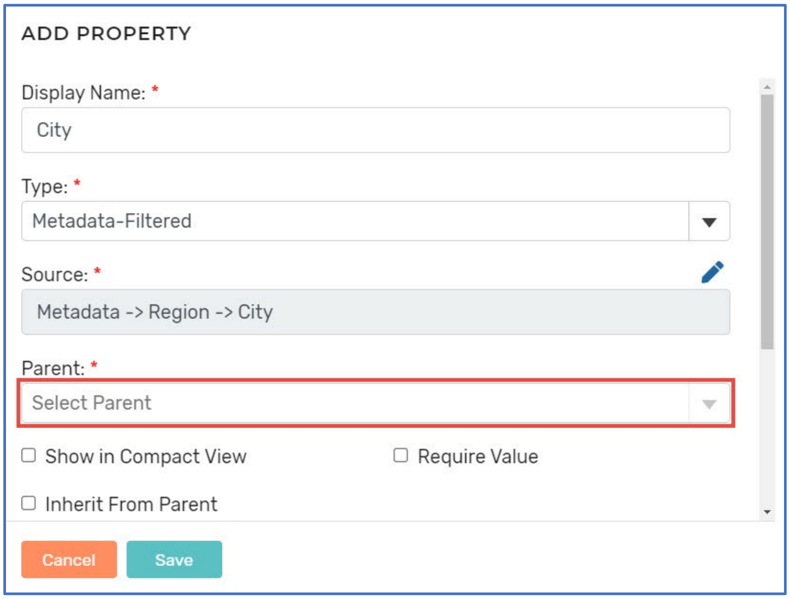
ii. Navigate to and select the relevant metadata subcategory to use for the property's source and click **Save**.



<u>Notes:</u>

- The selected metadata subcategory must have at least 1 value for the related property to **Save**.
- The same metadata subcategory can be used on multiple occasions for the same business object class.

- For **Metadata-Filtered** type only: Select the related **Parent** from the available values in the drop-down list (these values are based on the selected **Source** and its existing cascading metadata relationship).



> **Note:** If the **Metadata-Filtered** type is selected, a metadata subcategory can only be saved as the **Source** if it has a related subcategory established (ie, has an existing cascading metadata relationship). A **Metadata** type property with a relevant parent source must be added before a **Metadata-Filtered** type property with a child source is added. The parent property will appear in the **Parent** drop-down. For second level or higher cascading relationships (eg, **Country-State-City**), the parent property could be of **Metadata-Filtered** type.

d. Check the following described boxes based on the selected property type, as needed, and click **Save**.

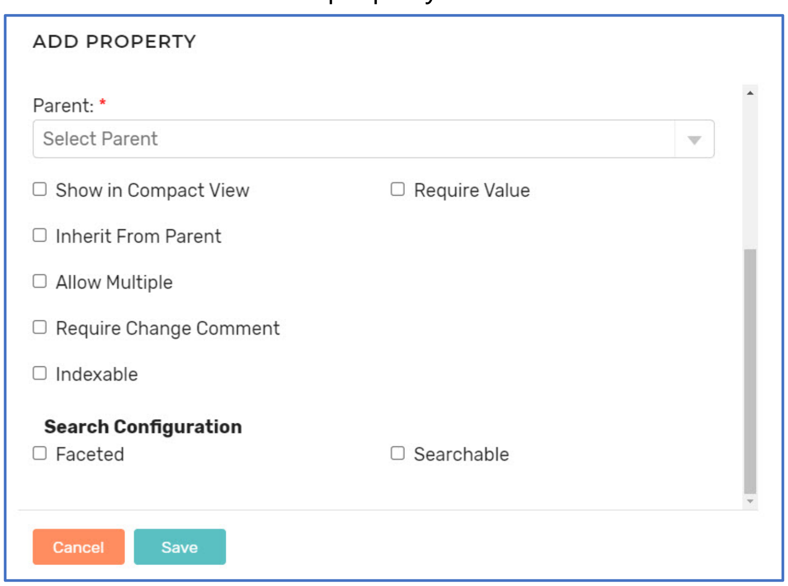
- **Show in Short View** - check this box to have the property appear in the short view (search results display) of the business object
- **Inherit from Parent** - check this box for the property to be inherited from its parent business object based on the **Navigator Scheme** configuration
- **Allow Multiple** (applies to **Metadata**, **Metadata-Filtered**, and **Users** types only) - check this box to allow the user to select multiple values for this property during object creation. This setting cannot be undone after the **Property** has been saved.

Note: While the choice to **Allow Multiples** cannot be undone after object creation, the user can go back and select **Allow Multiples** after the object has been created.

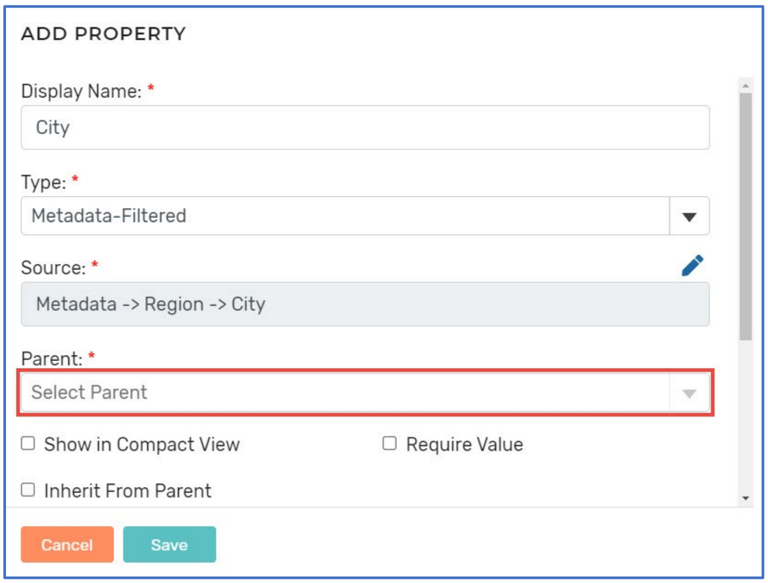
- **Require Change Comment** - check this box if the user will be required to add a comment to be displayed in version history if/when manually editing the specified property for an existing object (eg, **Document**)
- **Indexable** (cannot be checked for the **Date Time**, **Multiline Text**, and **Rich Text** types) - check this box to configure that property to be used as a filter for that business object

Note: For most system properties (state, created by) the indexable setting is not needed. For the **Owner** property, it must be marked as indexable for it to show up in queries.

- **Require Value** - check this box to make the property mandatory to be added/selected during object creation
- **Allow Editing** (appears if **Inherit From Parent** box is checked) - check this box to enable editing of this property after inheriting from the Parent
- **Faceted** - check this box to allow this property to appear as a filter when this business object is being searched (cannot be checked for **Multiline Text**, **Rich Text**, and **Text**)
- **Searchable** (does not appear for the **Date Time**, **Number**, and **Yes/No** types) - check this box to allow the property's value to be searchable

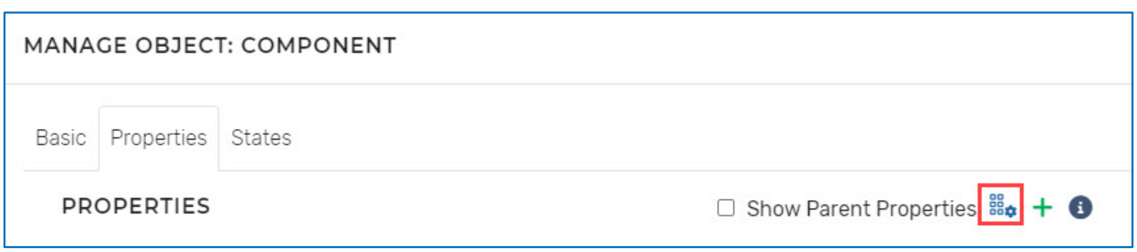


> **<u>Note:</u>** When adding a property to the **Instructional Text** object only, an additional **Match With Component** checkbox is displayed. If this setting is enabled (ie, checkbox checked), an actual instructional text instance (as configured in the info model; see the **InteliNotion Authoring Configurations Guide** for details) will display if it has a matching value (or no value) for the specified property. If more than 1 property is configured with the **Match With Component** setting, however, the instructional text will display if any of the property values match the associated component's property values. No more than 10 properties are recommended for the **Instructional Text.**



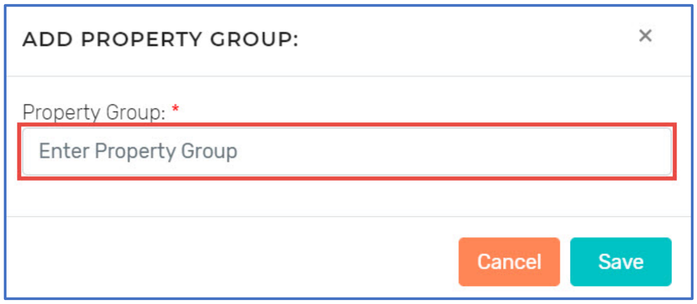
3. If needed: Add or manage property groups (which are displayed in the **Generate Document** form) as follows:

   a. Click the **icon**.

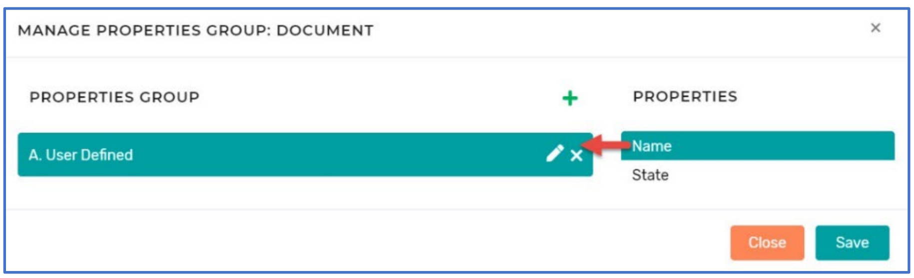


b. To add a **Property Group**, click on the **add** **icon**.

  i. Enter the **Property Group** name and click **Save**.

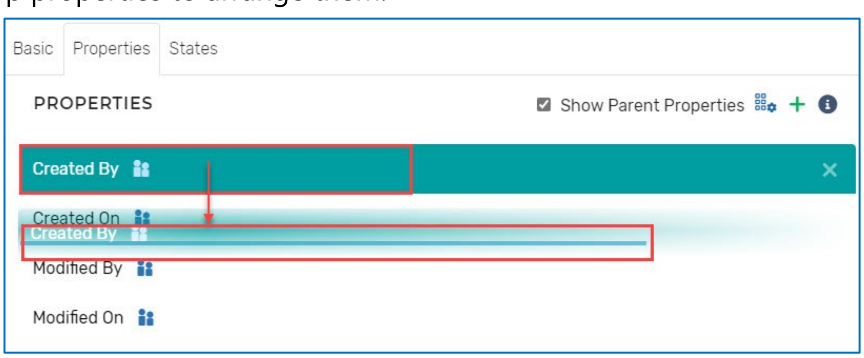


  ii. Drag and drop properties from the right-hand pane to the area below the **Property Group** name. Click **Save** after adding all the desired properties.



> **<u>Note:</u>** Any properties that have a parent-child relationship established (ie, using a **Metadata-Filtered** type of property) must be added to the same property group. If the user attempts to add the related properties to different groups, he/she will be prompted to move the properties into the same group. Any properties not added to a property group will be included in a default group named **Default** for users.

4. If needed: Change the order in which the properties appear on the object creation form (eg, **Generate Document** - **Properties**), check the **Show Parent Properties** box, and drag and drop properties to arrange them.



> **Note:** When the new object is saved, the user may be prompted to reset the search index if a relevant property requiring a change to the search configuration was added. Click **Yes** to reset immediately or **No** to postpone.

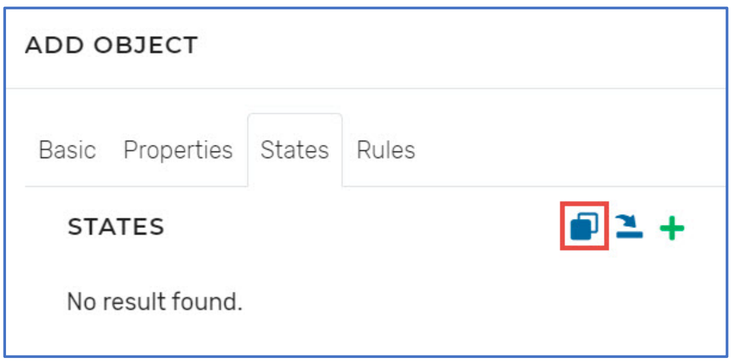
3.2.3 States Information

Follow the steps listed below to complete the States Tab.

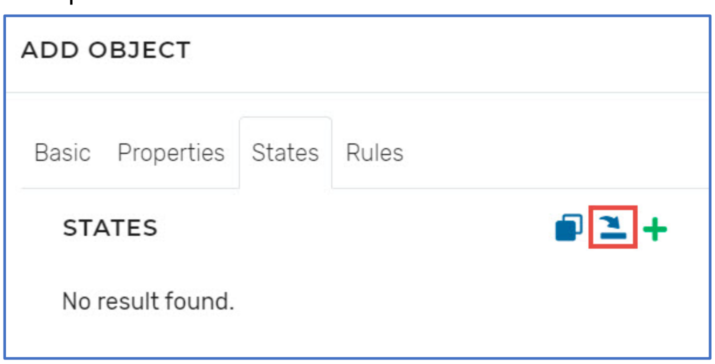
1. Click the **States** tab.

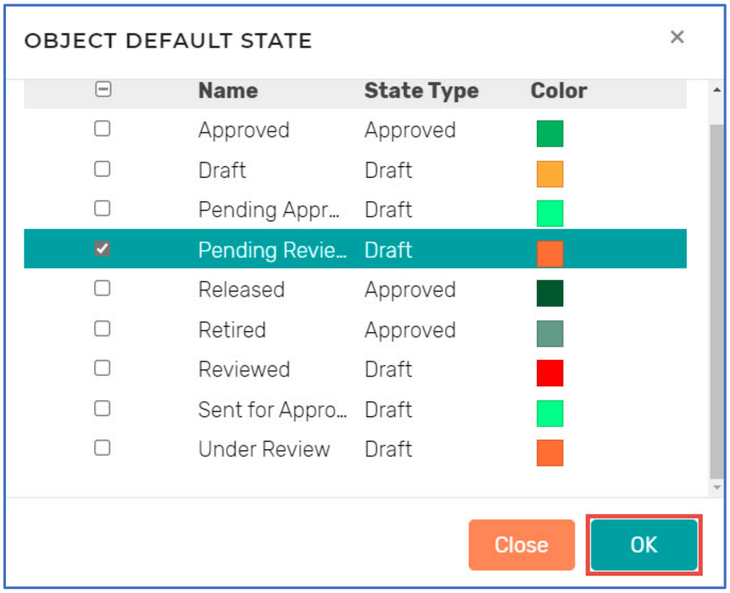
2. Select from the following options to add a new state to the business object.

   a. Option 1: Click the **icon** to copy the states from the parent object.



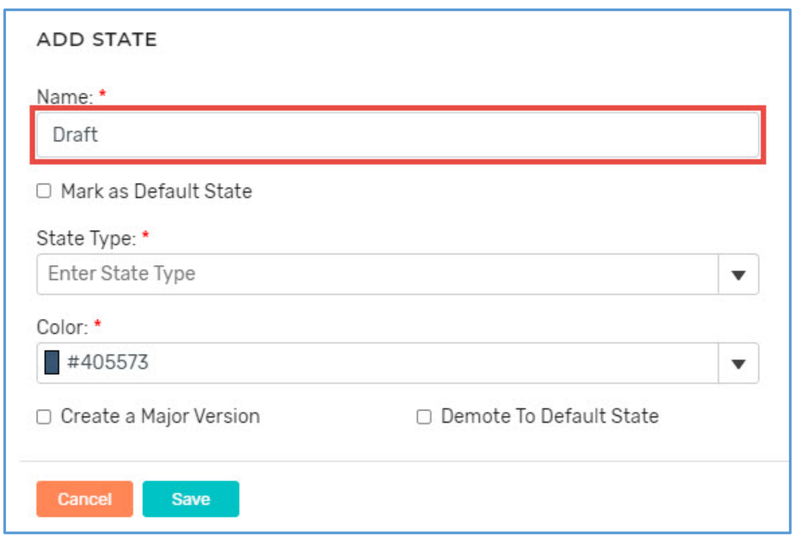
   b. Option 2: Click the **icon**, select the desired states from the **Default State Catalog**, and click **OK** to import the states.



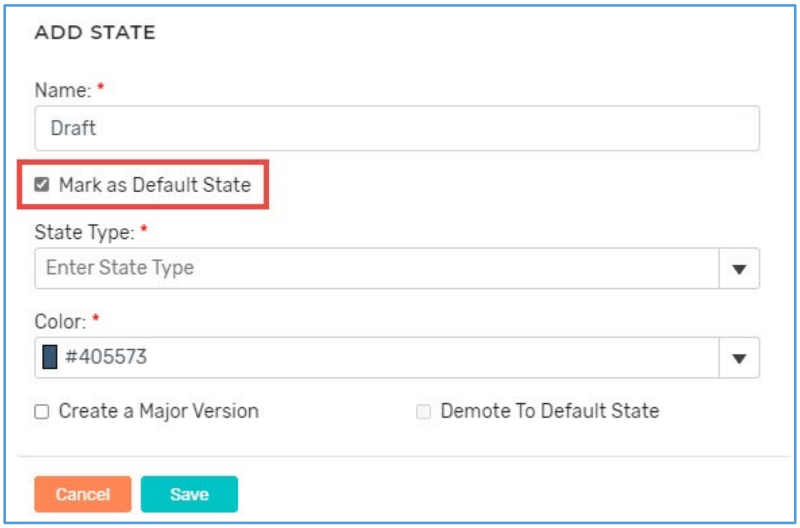


c. Option 3: Click the **add icon** + to add a new state, enter/select all the details in the form, and click **Save**.

i. Enter a **Name** (spaces are allowed).



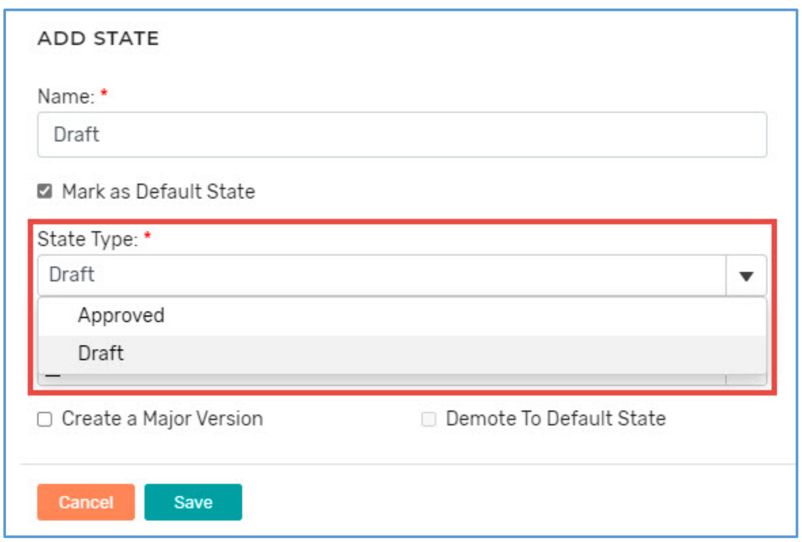
ii. Check the **Mark as Default State** box to make it the default state of that business object.



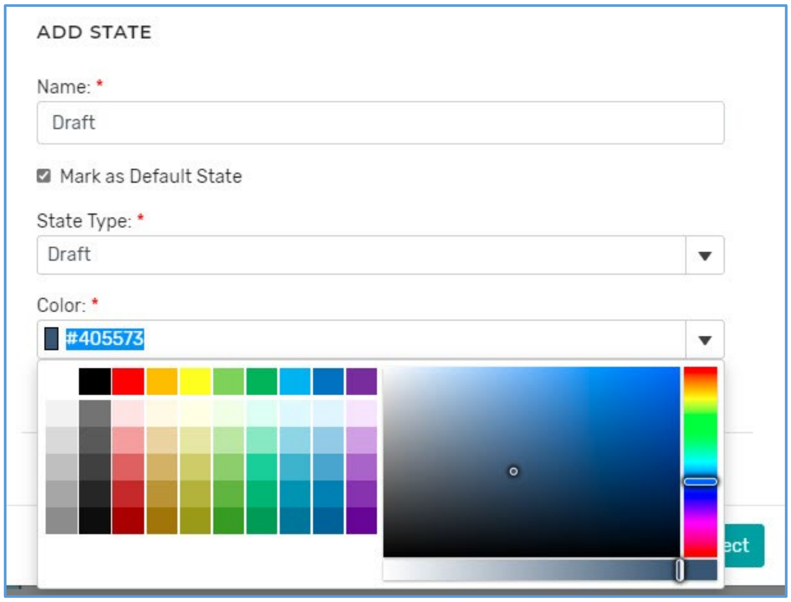
Note: One state is required to be marked as default state for each business object.

iii. Click the **State Type** dropdown and select a type from the following values:

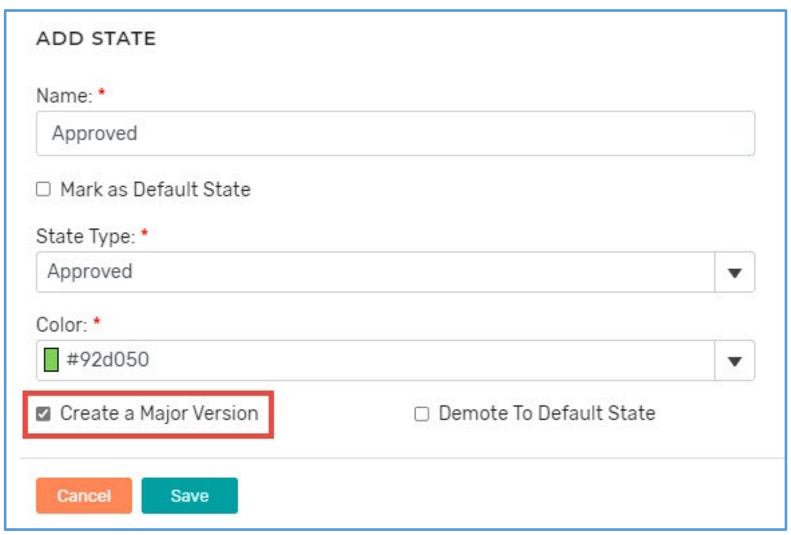
- **Draft**- Select if the state itself is for a draft type
- **Approved**- Select if the state itself is for an approval type



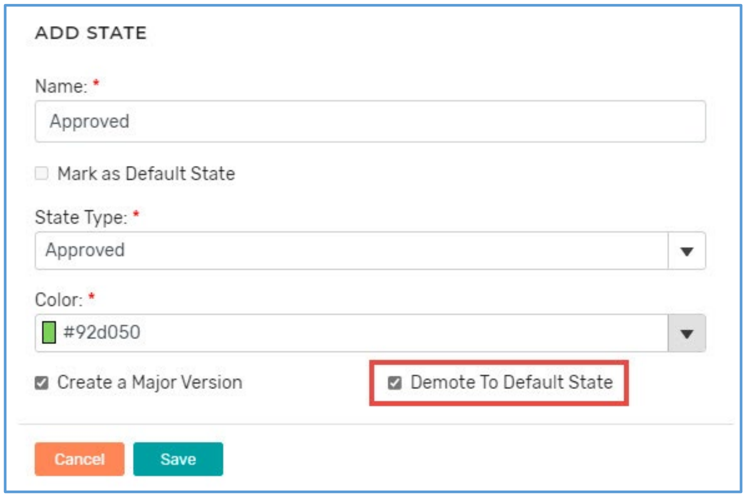
iv. Select a **Color** from the available options.



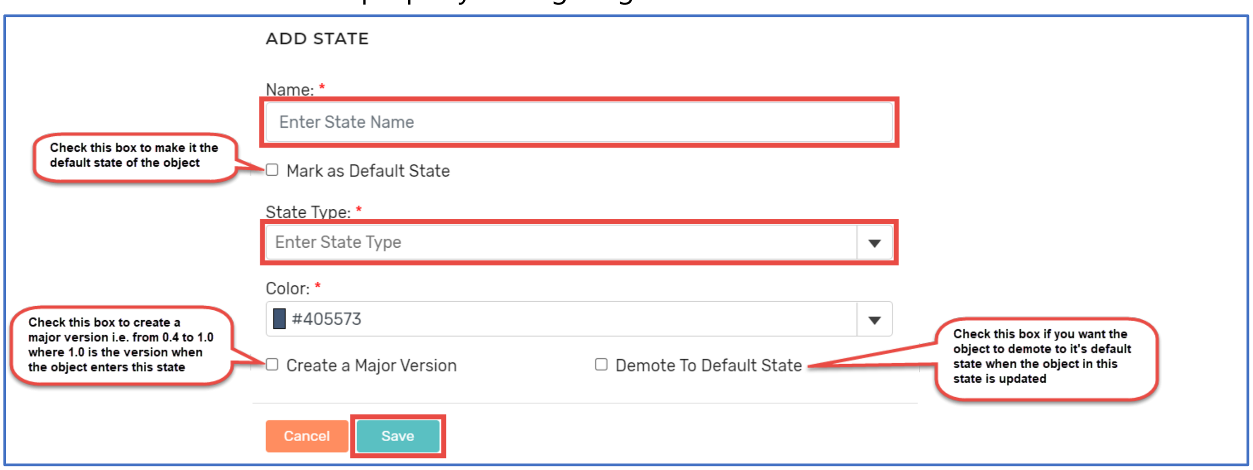
v. Check **Create a Major Version** to create a major version ie, from version 0.4 to version 1.0, where version 1.0 is the version whereby that business object enters the major version state.



vi. Check the **Demote to Default State** box if you want the business object to demote to its default state when the business object in this state is updated, depending on the conditions listed below:



- The Demote to Default State will be honored when a user edits and saves a document when it is in an approved type state
- The Demote to Default State will be ignored when a user selects a 'Lifecycle Action' transition
- The Demote to Default State will be ignored when a user changes a state only of a document through Right-click > More > Edit Information action
- The Demote to Default State will be honored when a user updates any non-state property through Right-click > More > Edit Information action



- Repeat the steps above until all **State Types** are added (1 state must be marked as the default), as appropriate.

3. Click **Save Object**. Once the confirmation message is displayed, click **Close** to finish the object's configuration.

Note: If needed, states can be reordered via drag and drop.

3.2.4 Rules Information

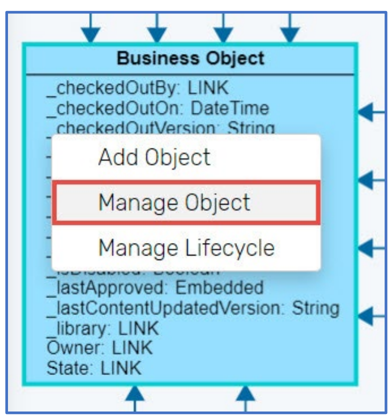
For the **Document** business object class or any of its subtypes only, the is an additional rules tab. See Section 3.5 for information on how to complete the Rules tab.

3.2.5 Lifecycle Rules

For the **Document** business object class or any of its subtypes only, the is an additional rules tab. See Section 3.6 for information on how to complete the Lifecycle Rules tab.

3.3 MODIFYING A BUSINESS OBJECT

To update an existing object, right-click on the object to be updated and click **Manage Object**.



Notes:

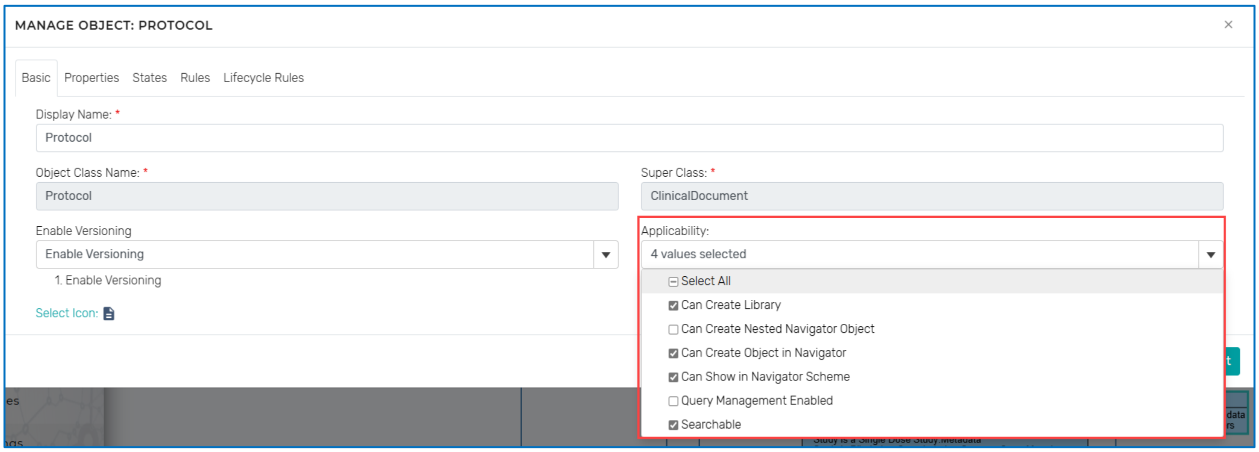
- Certain attributes (eg, **Internal Name**, **Object Class Name**, **Super Class**) cannot be modified and will display on existing objects as read only.

- When an object property has its search configuration (ie, the **Searchable** or **Faceted** setting) is changed, the user may be prompted to modify the **Search** (index) configuration, see Section 2.3.1 for details.

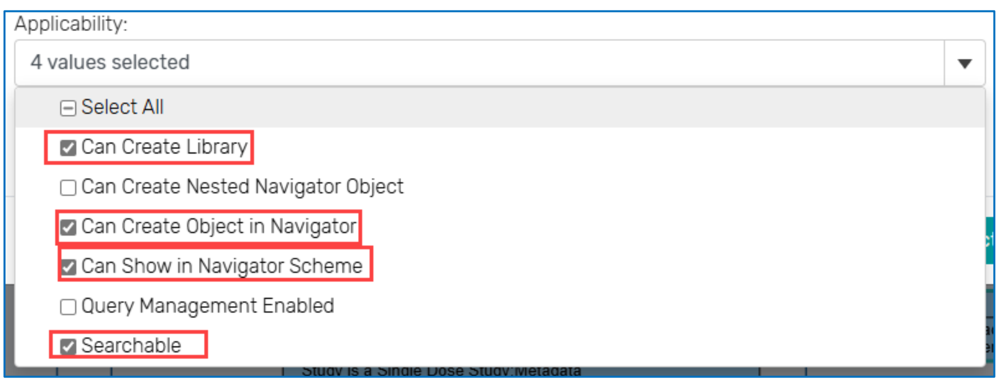
The **Manage Object** pop-up screen contains the Basic, Properties, States, Rules, and Lifecycle tabs (refer to Section 3.2) and allows a user to restrict non-default objects (ie, business object, document) in the Navigator using **Basic** tab **Applicability** drop-down.

Follow the steps listed below to restrict a non-default business object from being displayed in the Navigator.

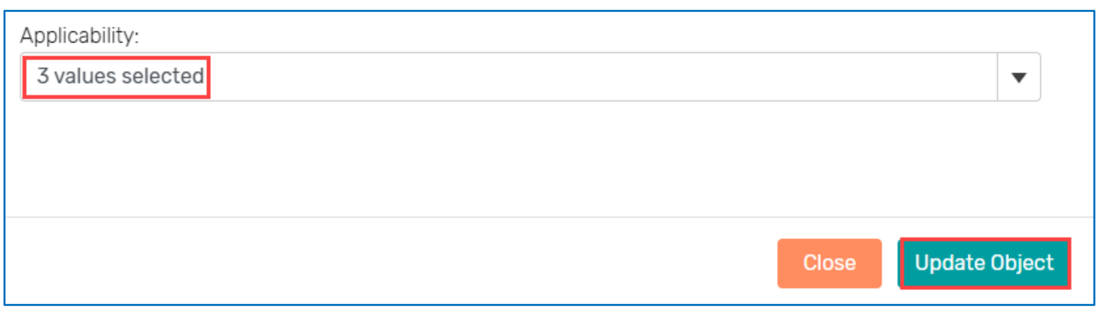
1. On the **Manage Object** pop-up screen **Basic** tab, click the drop-down arrow in the **Applicability** field.



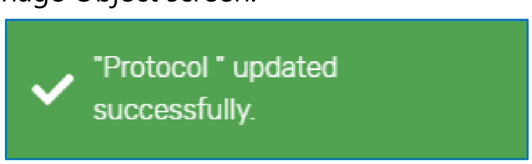
2. 4 values are selected by default – **Can Create Library**, **Can Create Object in Navigator**, **Can Show in Navigator Scheme**, and **Searchable**. When a user navigates to existing objects created from the restricted class, they can view, edit, and manage those objects without any restrictions.



3. When the checkbox is checked, the **Can Create Object in Navigator** and **Can Show in Navigator Scheme** will restrict the business object from creating or displaying in the Navigator and updating the Navigator scheme.
    a. If unchecked, the 'Can Create Object in Navigator' option will not be listed for BO class selection when creating a new object for the following actions: Add New, Add Business Object, Generate Document, Generate and Open Document.
    b. If unchecked, the 'Can Show in Navigator Scheme' disabled business object class will instantly become unavailable to create new objects and prevents another user to make updates to the Navigator scheme.
        i. If a second user attempts to add an object using the now-disabled BO class, an error message will display: "Unable to add a new <business object class name> because its underlying business object class has been disabled for use."
        ii. If the user attempts to click **Save** using the now-disabled BO class, an error message will display: “"Unable to save the Navigator Scheme because the following business object class(es) have been disabled for use: <<Comma separated Names of all those business objects>>. Please change the configuration and try again."
    c. If a disabled BO class is unchecked, but was previously included in the Navigator scheme, the class will not be removed from the scheme and existing instantiated objects will still display in Navigator scheme. A user must manually remove the now-disabled BO class from the scheme and re-save.
4. Click out of the **Applicability** drop-down menu. The **Applicability** field will now show one less selection. Click **Update Object**.

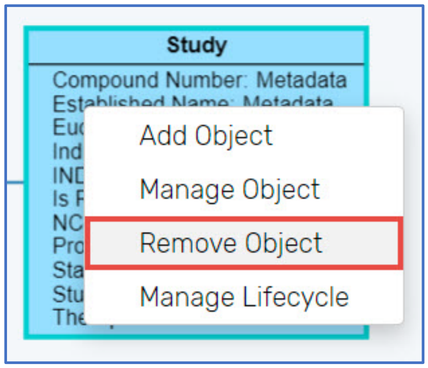


5. A pop-up message will display when the system has successfully updated the object. Click **Close** to exit the Manage Object screen.



3.4 DELETING A BUSINESS OBJECT

To remove an object, right-click on the object to be removed and click **Remove Object**.

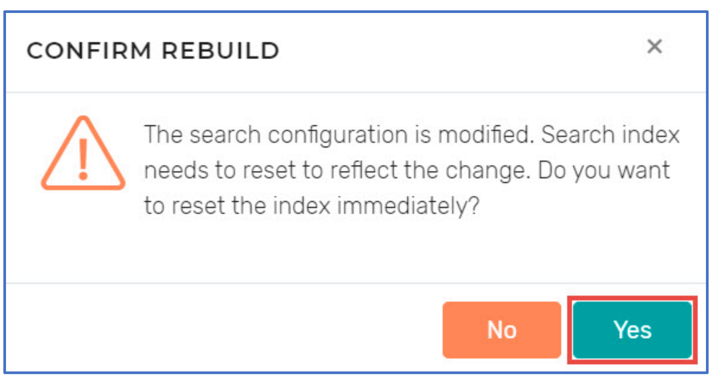


<u>Notes:</u>

- If an object has been used in the system in any of the following ways, it cannot be removed:
  - Any instantiated object created from the business object to be deleted (including those in the Recycle Bin)
  - A related configuration that would result in a referential integrity error if the business object class were deleted, including a Managed Library, Component Tag, or Info Model
- If the business object has a related configuration, but deleting will not cause a referential integrity error (ie if the business object class has a 'child' item such as a connector profile), a warning message will display prompting the user to confirm the deletion before proceeding.

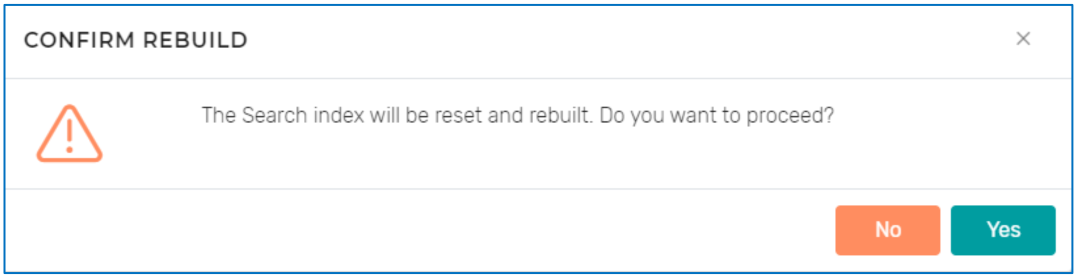
3.4.1 Resetting Search Index

After an object property has its search configuration (ie, the **Searchable** or **Faceted** setting) changed, the user may be prompted to modify the **Search** (index) configuration.

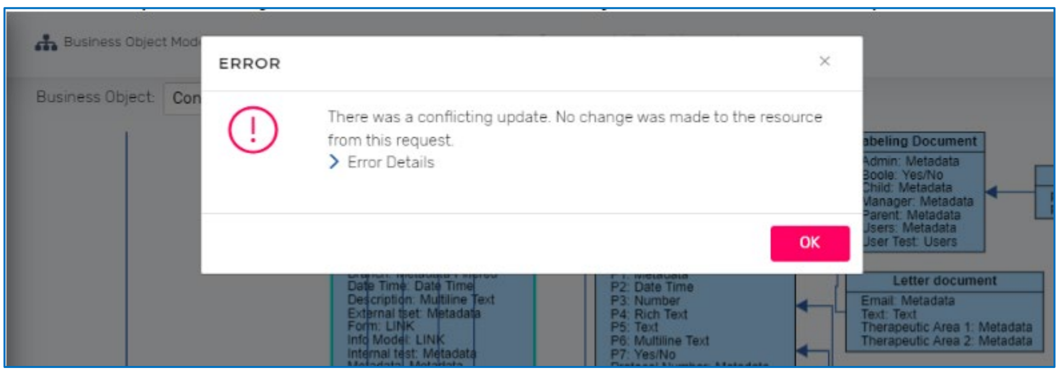


Click **Yes** to reset immediately or **No** to postpone. If postponed the index will be reset as part of as part of a scheduled job the following night.

To modify a business search index, click the reset search index icon at the top right of the business object modeler. Click **Yes** to confirm the update, and **No** to cancel.



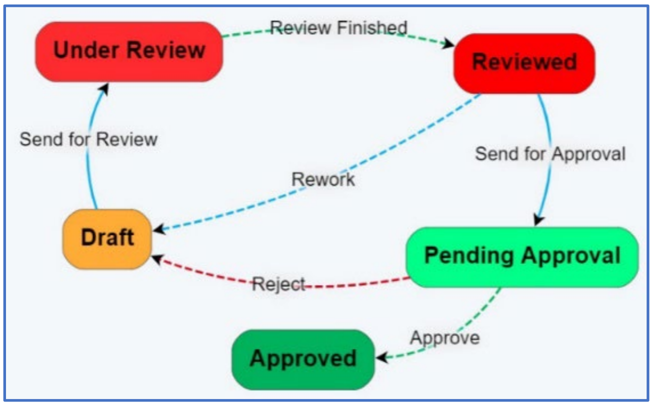
Note: If a search index reset is already in progress, the user will receive an error message, as shown below.



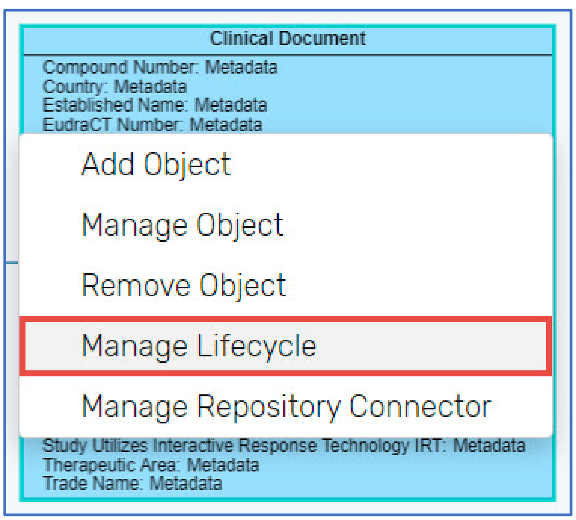
3.5 CONFIGURING LIFECYCLE STATE TRANSITIONS

When the lifecycle states are configured for an object, the lifecycle transitions must be configured to enable task assignments and automated lifecycle state transitions. Typically, this is done for **Document** and **Component** objects, but it can be done for other objects (eg, **Template**, **Instructional Text**), if/when deemed appropriate.

A sample lifecycle is pictured below, however, the lifecycle states and transitions for an object are client specific.

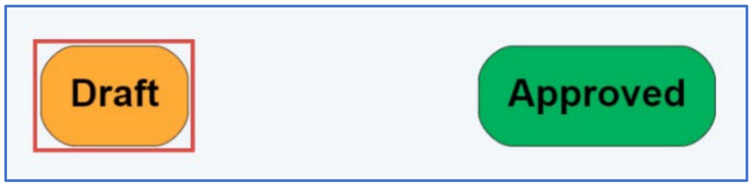


1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Business Objects**.
   - Right-click on the object (eg, Clinical Document) and click **Manage Lifecycle**.

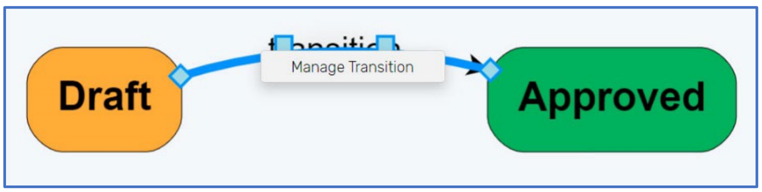


Note Initially, the lifecycle scheme will only include the states that were configured for the object.

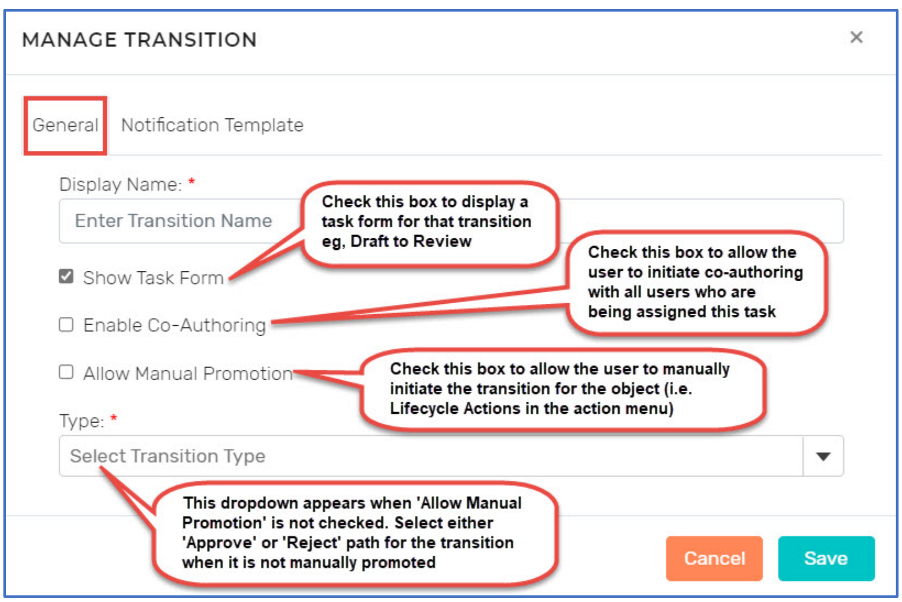
2. Hover over the state to initiate the transition from, until the cursor turns into a hand. Click that state and drag the hand until it is over the state that is desired to end the transition and release the mouse button.



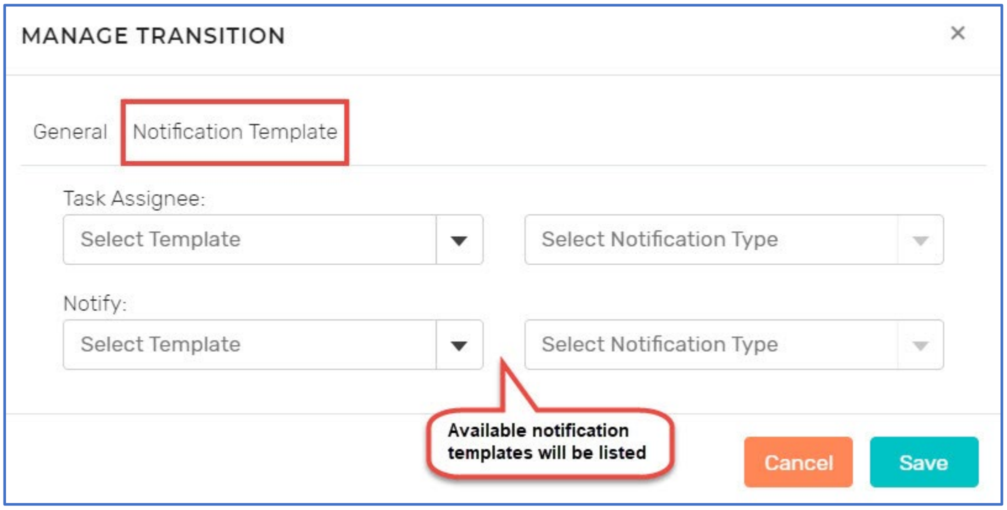
3. Right-click on the newly added transition and click **Manage Transition**.



4. Under the **General** tab, enter a **Display Name** for the transition, and check the other boxes, as applicable.



5. Click the **Notification Template** tab, select the relevant notification templates for task assignees and/or notification recipients, as applicable, and click **Save**.



<u>Note:</u> The **Notification** template configuration is outlined in Section 5.

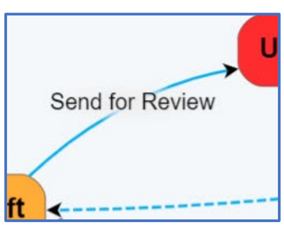
6. Repeat Steps 3-6 until all lifecycle state transitions are added, as needed.

Note: If needed, a state may have more than 1 transition configured for it to enable both an 'accept' path (ie, promotion to the next or 'higher' state) and a 'reject' path (ie, demotion to the prior or 'lower' state).

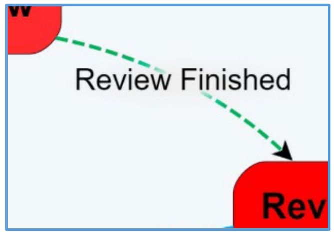
7. When finished, click the **Save Scheme** icon in the top-right corner.

8. To delete a lifecycle scheme (ie, all lifecycle state transitions), click the **Remove Scheme** icon.

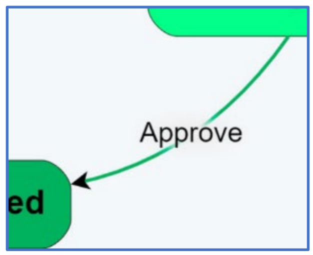
   a. If a task is associated with a lifecycle transition (eg, when initiating a review), the transition's arrow will appear blue.



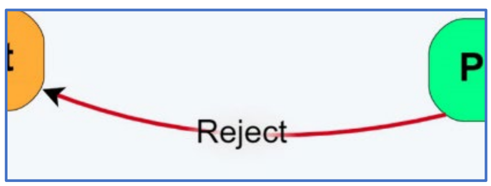
b. If a task is not associated with a lifecycle state transition (eg, when a review is finished), the transition's arrow will appear dotted.



c. If manual promotion is not allowed and the transition type is **Approve**, the transition's arrow will appear green.



d. If manual promotion is not allowed and the transition type is **Reject**, the transition's arrow will appear red.



3.6 CONFIGURING DOCUMENT-COMPONENT VERSION BINDING

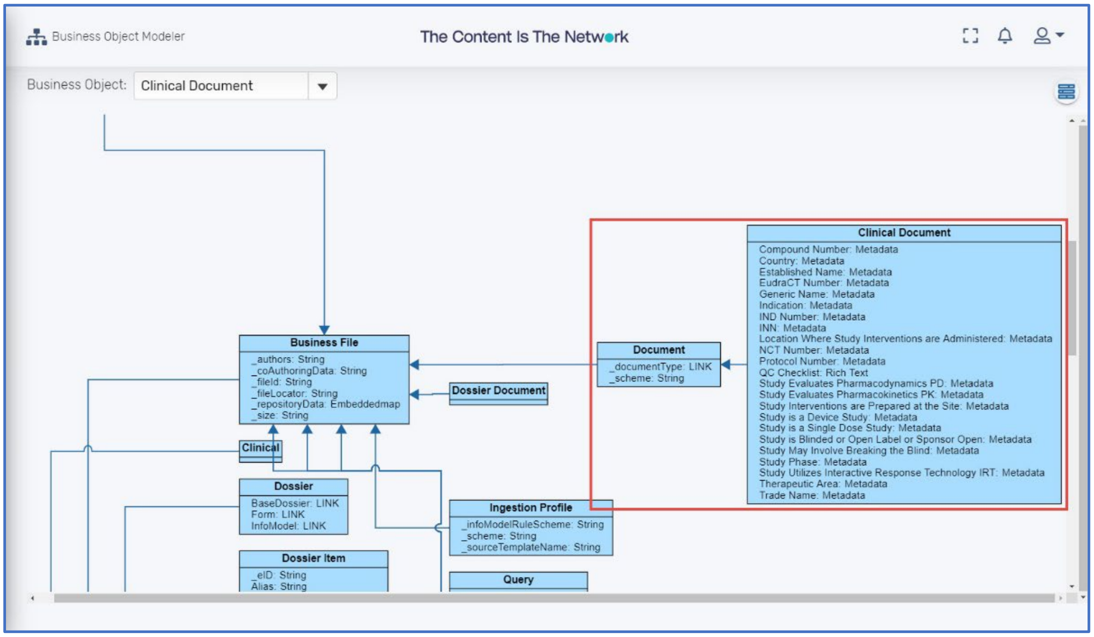
A specific version of a component is bound/pinned to a document based on predefined, configurable rules that are applied to the **Document** business object class or any of its subtypes only.

Document-component version binding can occur, but is not limited to, the following example states:

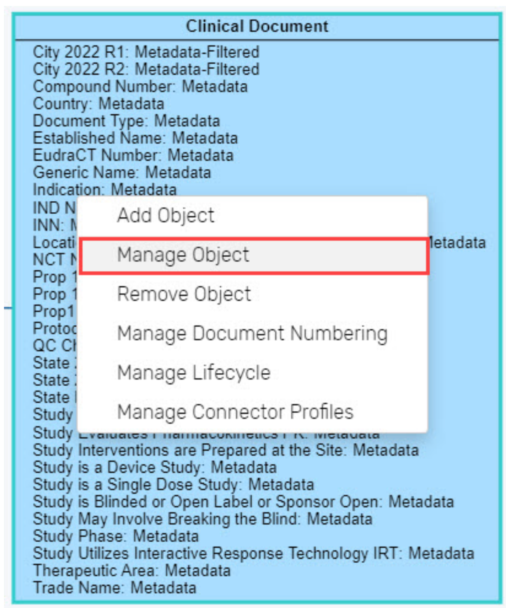
- If an **Approved** component is reused **As Is**
- If a **Draft** component becomes **Approved**
- When a document is **Approved**

3.6.1 Configuring Version Binding Rules

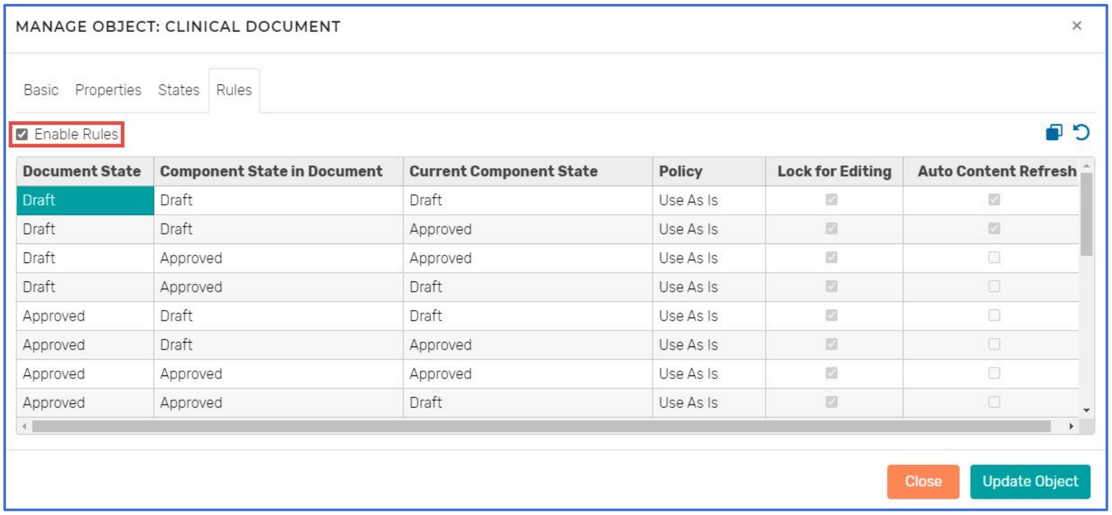
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Business Objects**.
2. Navigate to the **Document** business object or any of its subtypes (eg, **Clinical Document**, **Labeling Document**).



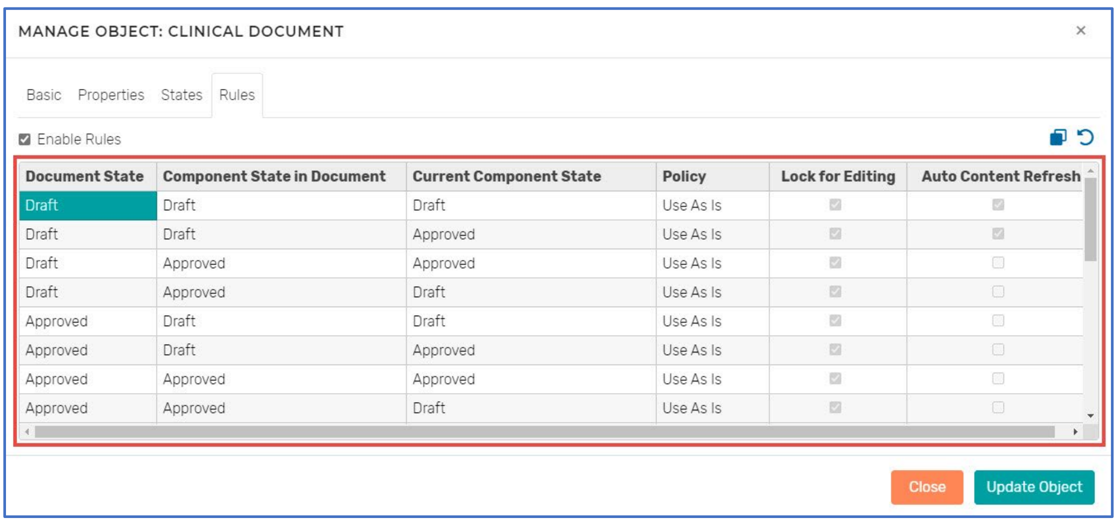
3. Right-click on the relevant **Document** business object and click **Manage Object**.



4. Click on the **Rules** tab. The **Enable Rules** checkbox should already be pre-checked.



5. A table with the possible rule combinations is displayed in the **Enable Rules** control box.

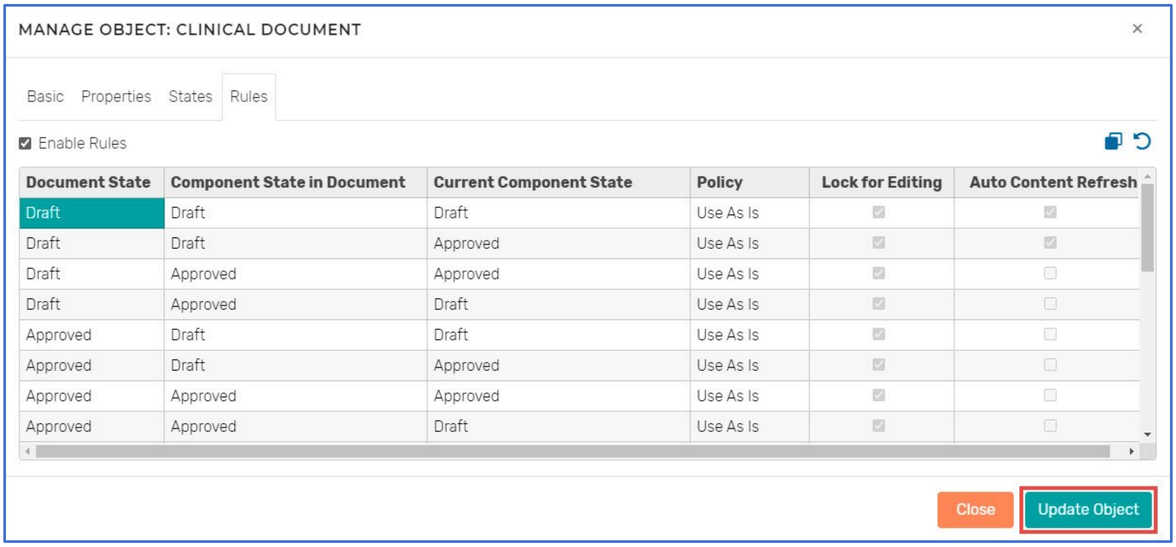


- The following columns are included in the table:
  - **Document State** - displays the document's current state where the reused component is included
  - **Component State in Document** - displays the state of the component that is currently associated with (ie, being used in) the document
  - **Current Component State** - displays the current state of the component, regardless of its association with any document
  - **Policy** - displays the reuse policy applied to the component when it was reused into the document (either during document generation or via reuse from

Navigator) or current reuse policy, if the original one was subsequently changed (eg, as is to repurpose)

- **Lock for Editing** - indicates if the component will be editable within the context of a document open for editing
- **Auto Content Refresh** - indicates if after the reused component is updated at source, an automated content refresh will occur for the component in the document when it is edited/checked out for editing

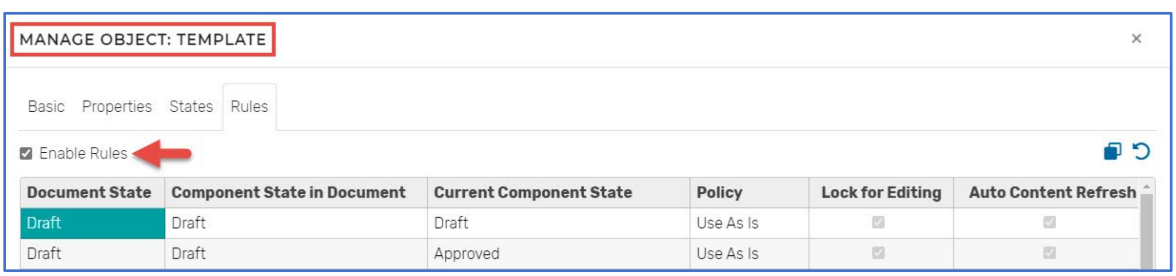
6. Adjust the rules, if needed, and click **Update Object**.



Document State	Component State in Document	Current Component State	Policy	Lock for Editing	Auto Content Refresh
Draft	Draft	Draft	Use As Is	☑	☑
Draft	Draft	Approved	Use As Is	☑	☑
Draft	Approved	Approved	Use As Is	☑	☐
Draft	Approved	Draft	Use As Is	☑	☐
Approved	Draft	Draft	Use As Is	☑	☐
Approved	Draft	Approved	Use As Is	☑	☐
Approved	Approved	Approved	Use As Is	☑	☐
Approved	Approved	Draft	Use As Is	☑	☐

Notes:

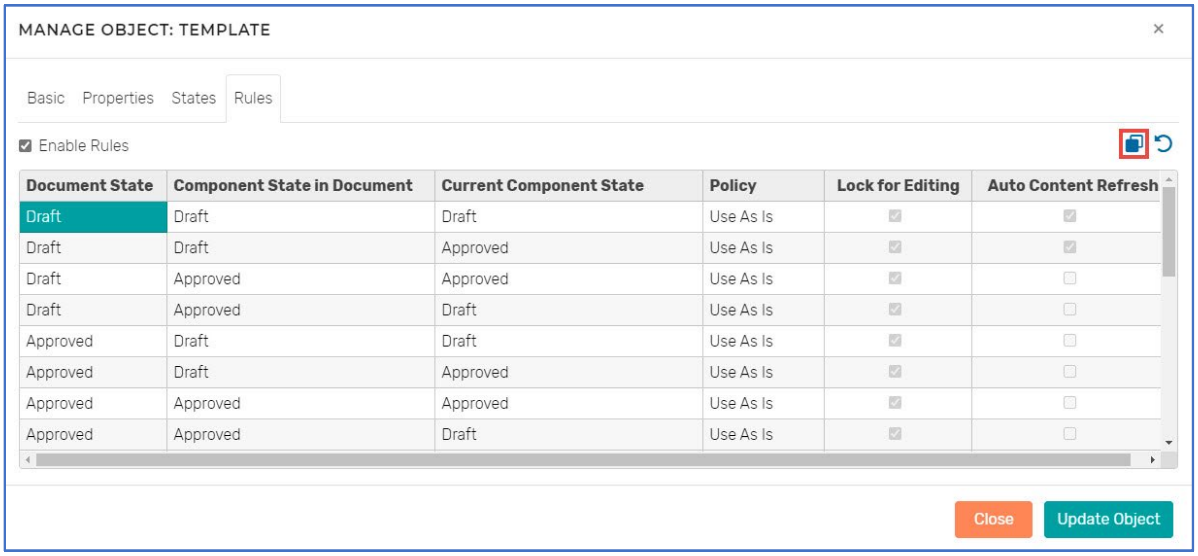
- It is recommended to consult with **InteliNotion** before making any changes to the rules.
- Version binding rules are also provided for the Template business object. Ensure that the rules are enabled to view and use the **Component Status Report** for a template. See the **InteliNotion Authoring Configurations Guide** for details.



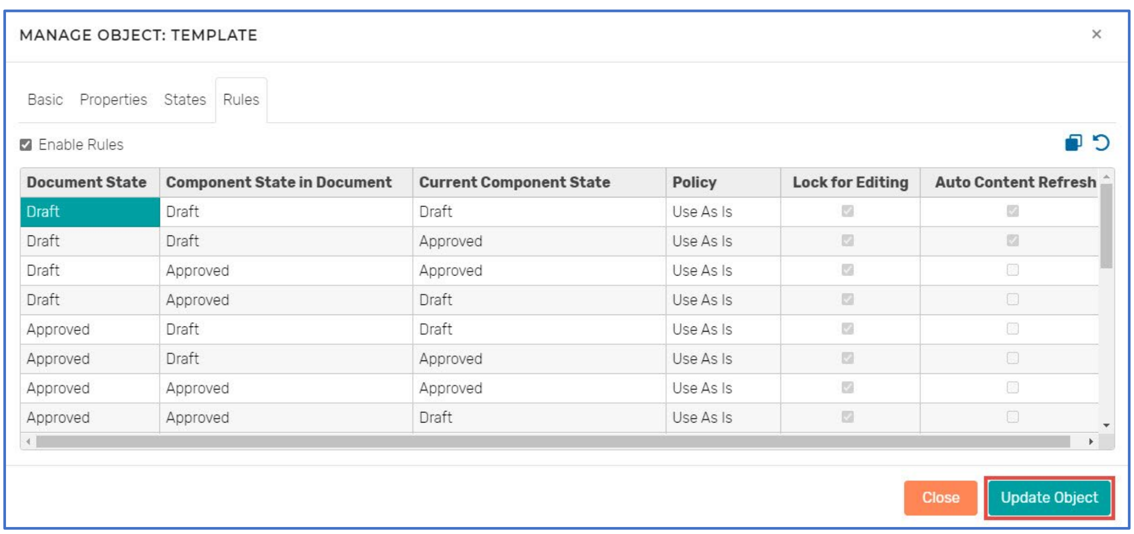
Document State	Component State in Document	Current Component State	Policy	Lock for Editing	Auto Content Refresh
Draft	Draft	Draft	Use As Is	☑	☑
Draft	Draft	Approved	Use As Is	☑	☑

3.6.2 Copying Version Binding Rules from a Parent Object

1. To copy the version binding rules previously configured for a parent object, click the **icon** located at the top-right corner.

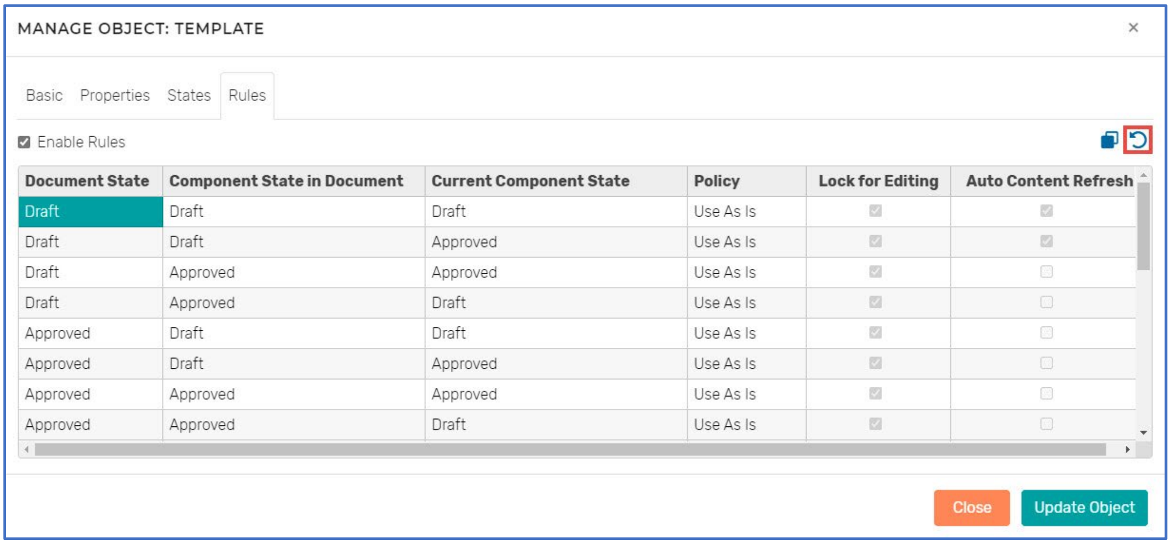


2. All rules configured for the parent object will appear for the current object. Click **Update Object**.

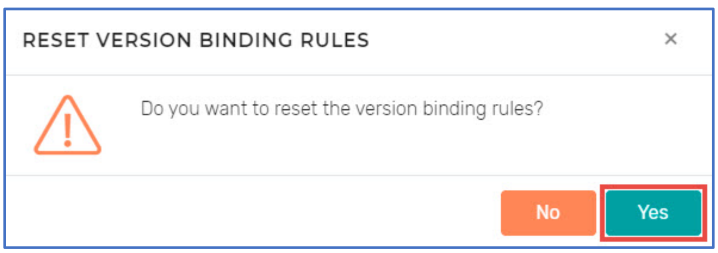


3.6.3 Reset Version Binding Rules

1. To reset the version binding rules, click the **icon** located in the top-right corner.



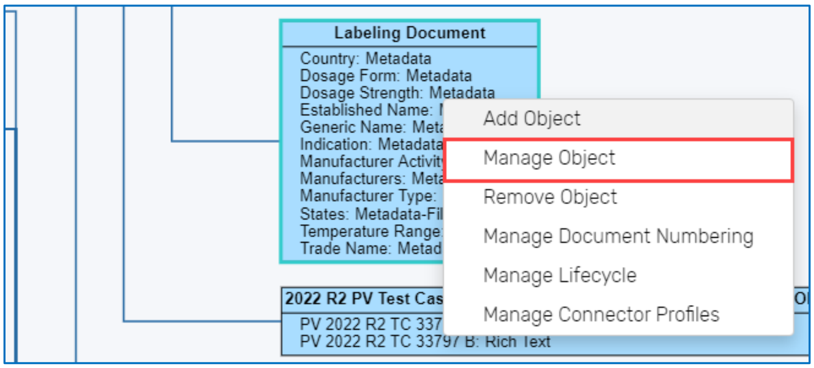
2. A confirmation message box will appear on the screen. Click **Yes** to reset the rules.



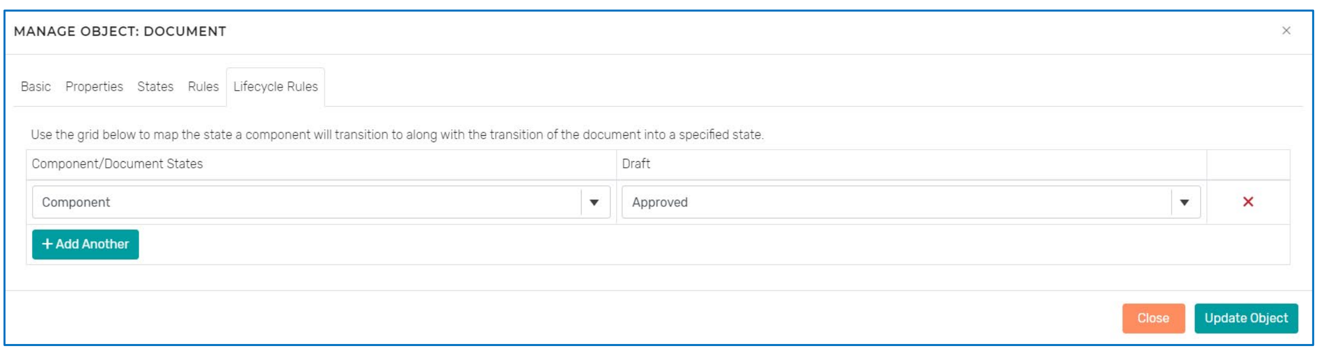
3.7 CONFIGURING LIFECYCLE RULES (FOR A DOCUMENT ONLY)

The Lifecycle Rules tab allows the user to configure a rule such that when a document's lifecycle state is changed (via manual or automatic transition), the lifecycle state of its editable components also transitions automatically to a predefined state. This behavior is typically configured for when the document state is changed to an 'approved' type state (eg, 'Document Locked'). To configure the lifecycle rules for a Document business object class, follow the steps listed below.

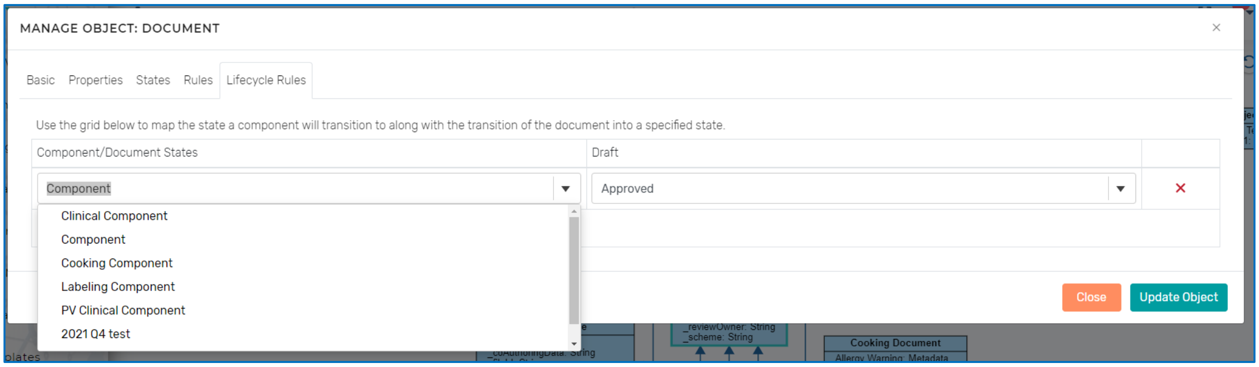
1. In the *Web Console*, navigate to the **Business Object Modeler**, and locate the document object to be configured.
2. Right click on the document object to be configured and select **Manage Object**.



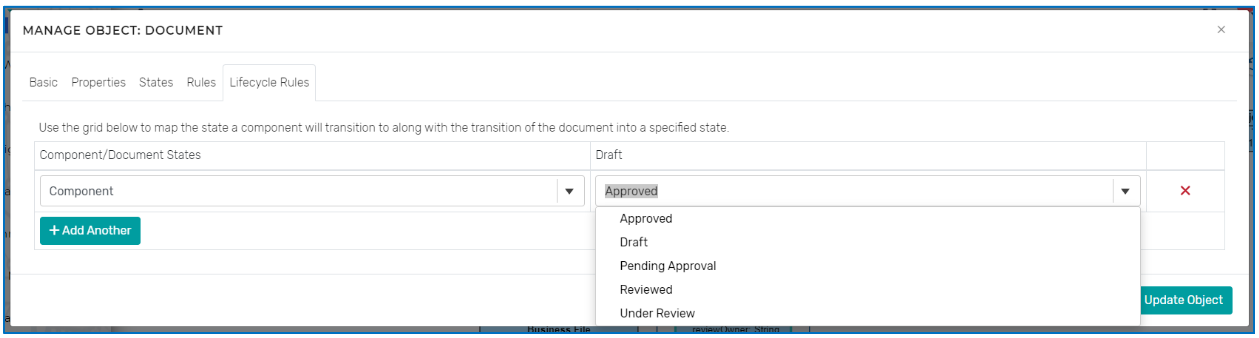
3. The **Manage Object** form will display. Click on the **Lifecycle Rules** tab.
4. The **Lifecycle Rules** tab will display with a column for the component object, and a column for the state the component will transition to with the document.



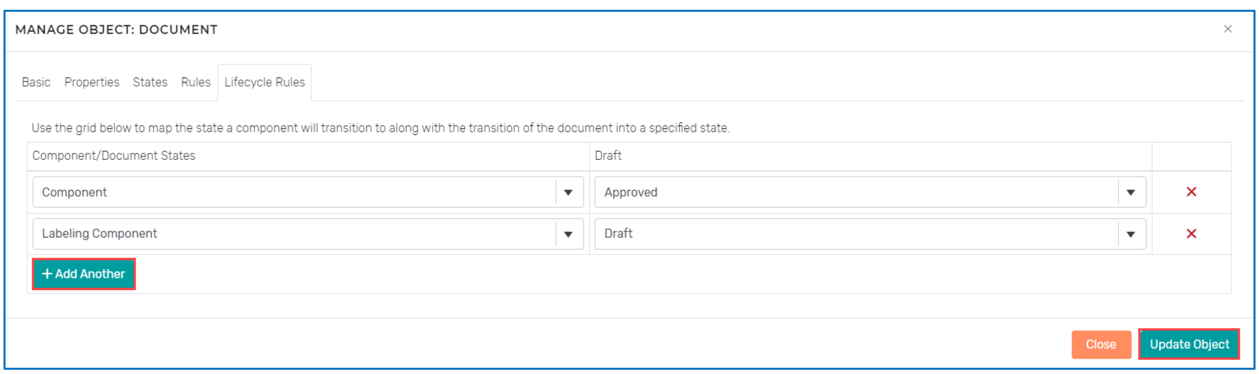
5. Choose the type of component to be configured from the **Component/Document States** drop-down menu.



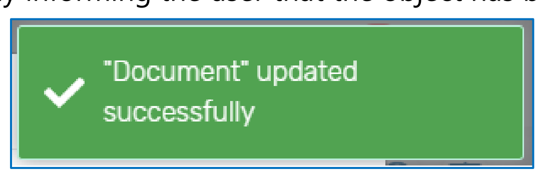
6. Choose the lifecycle state from the **Draft** drop-down menu.



7. *IF* necessary, click the **Add Another** button to add another rule, and follow steps 5-6. Repeat as necessary and click **Update Object**.



8. A pop-up will display informing the user that the object has been successfully updated.



9. Click the **Close** button to exit out of the **Manage Object** form.

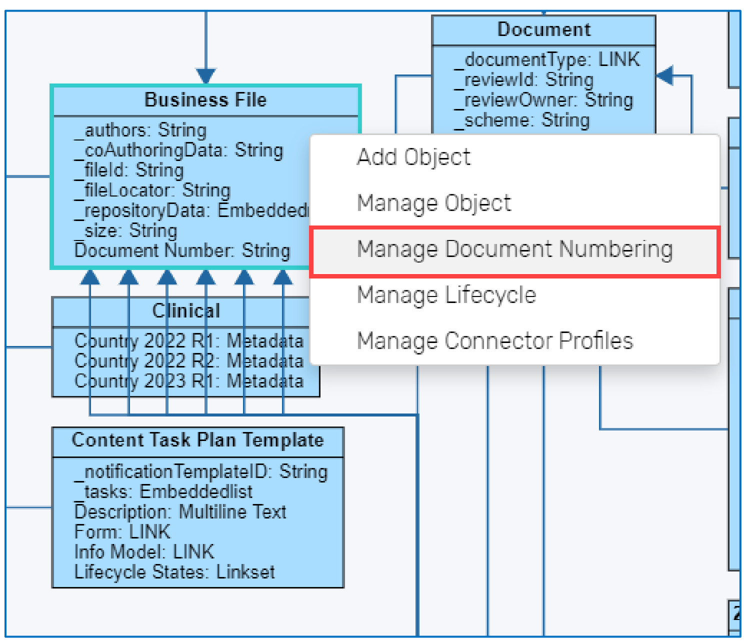
3.8 CONFIGURE UNIQUE IDENTIFIER

An authorized user or a full control administrator will have the ability to enable, define (any character and auto-numbering sequence) and configure a unique number (unique document identifier) for any business file or its subclasses. This can be done by manually inputting a numbering format, or by using the auto numbering function with the following parameters:

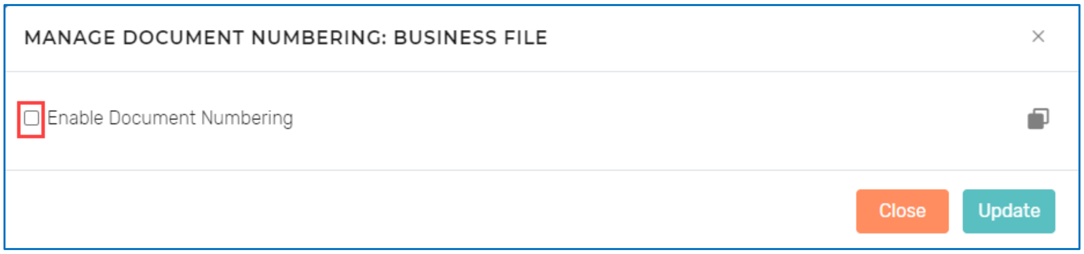
- Any set of characters can be manually inserted into the input field.
- The Multiline or Rich text data type properties are not available while configuring the unique number format.
- Auto numbering can be used in conjunction with a manually input character set.
- Auto numbering, when used, will input the number format as {#####} with each # referring to a single 0.
- When using auto numbering, there is a character limit of 20 for 0s represented by the # symbol, with a total limit of 256 for all characters auto and manual.
- Parent and child classes can be configured differently.

Follow the steps listed below to define a unique numbering format.

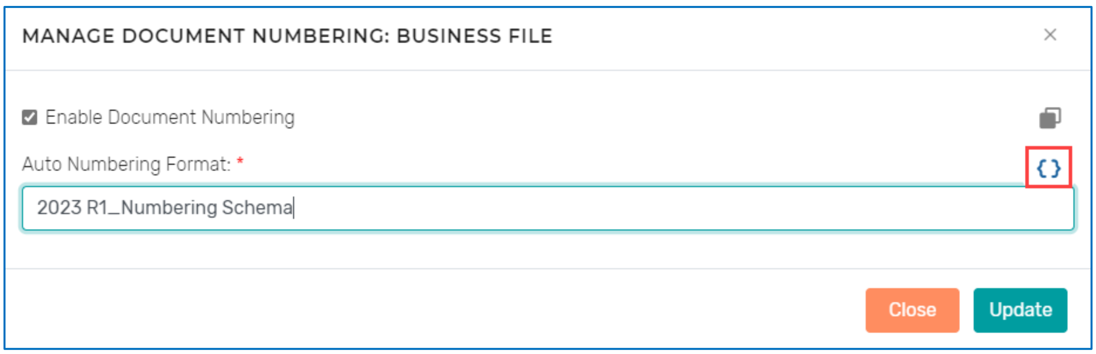
1. In the *Web Console*, navigate to the **Business Object Modeler**. Right click on **Business File** and select **Manage Document Numbering**.



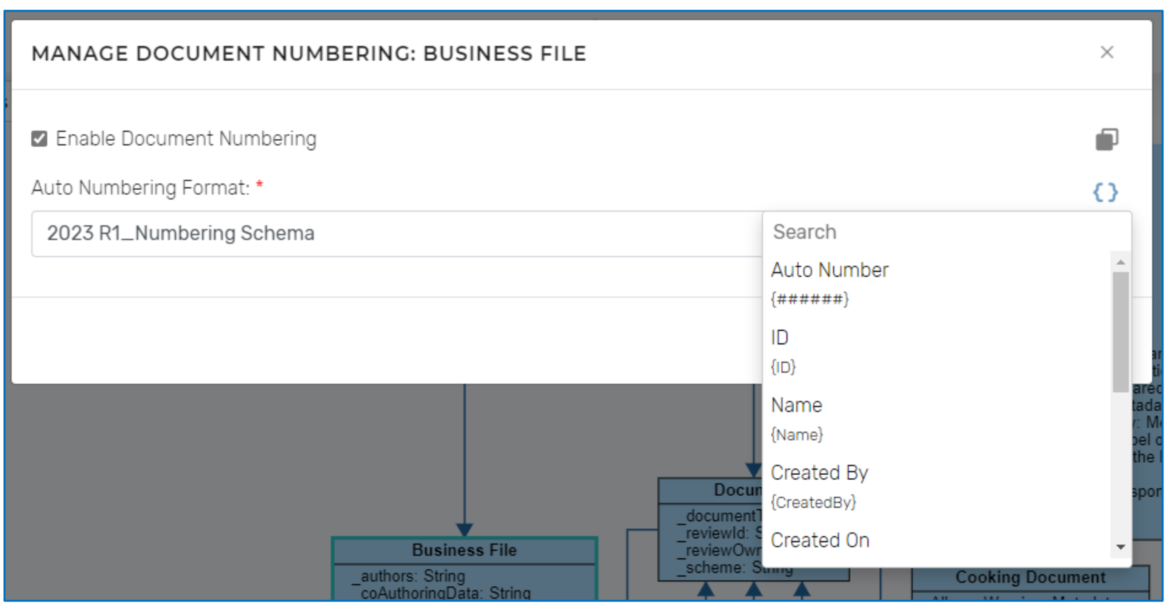
2. The **Manage Document Numbering** form will display. Check the **Enable Document Numbering** checkbox.



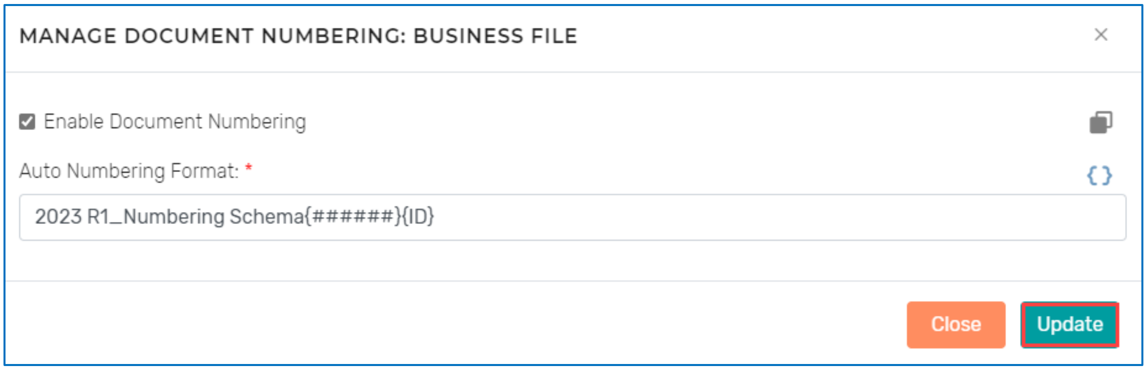
3. The **Auto Numbering Format** field will display. Enter any alphanumeric characters desired, leave the cursor active in the field, and click on the curly brackets above the field to add the auto numbering.



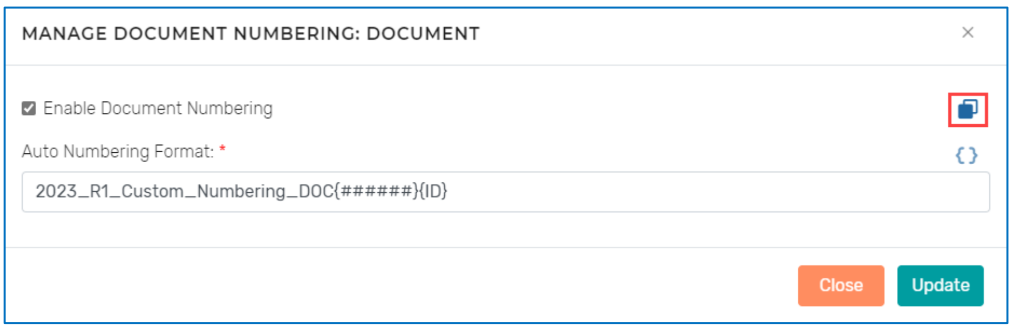
4. Double click on the auto numbering schema to be added to the auto numbering format field.



5. Repeat step 4 until the document number is configured as desired. Click **Update**.



Note: Unique document numbering for child business file objects can be configured using the steps listed above, or the **Copy format from parent** icon can be used to keep the same numbering schema from the parent business file.

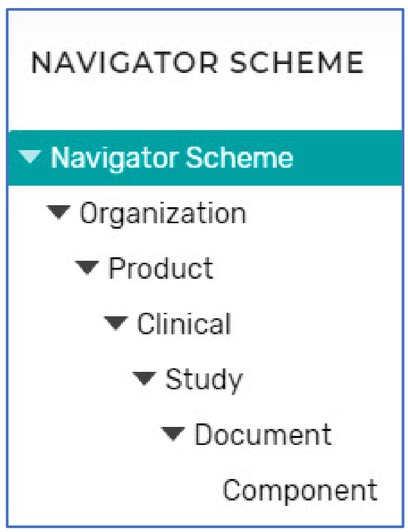


4. CONFIGURING THE NAVIGATOR SCHEME

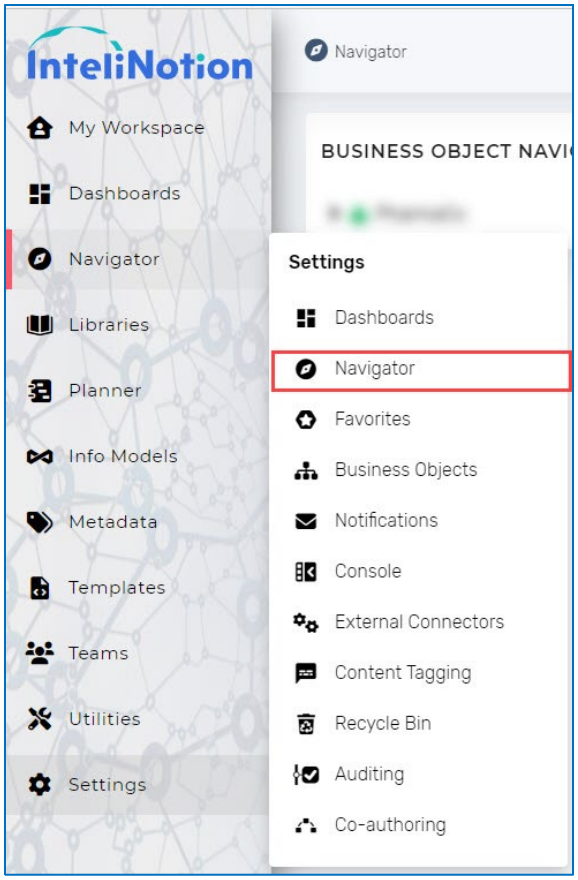
The Navigator Scheme determines how the objects will be structured in a hierarchy to allow for metadata and property inheritance, as well as enable navigation to specific objects in the system (eg, viewing documents and components).

The structure of the Navigator Scheme is client-specific, but typically follows this type of structure for clinical content.

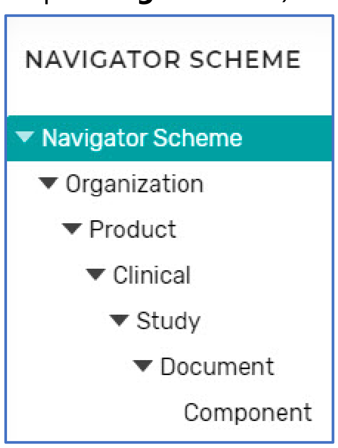
- ▼ **Organization**
  - ▼ **Product**
    - ▼ **Study**
      - ▼ **Document**
        - ▼ **Component**



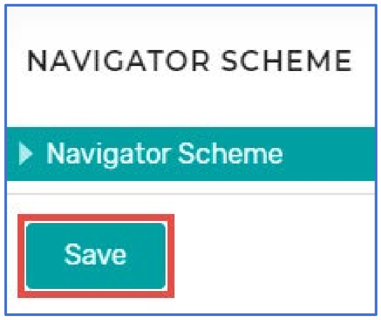
1. Hover over the **Settings** option in the left-hand navigation pane of the *Web Console* and click **Navigator**.



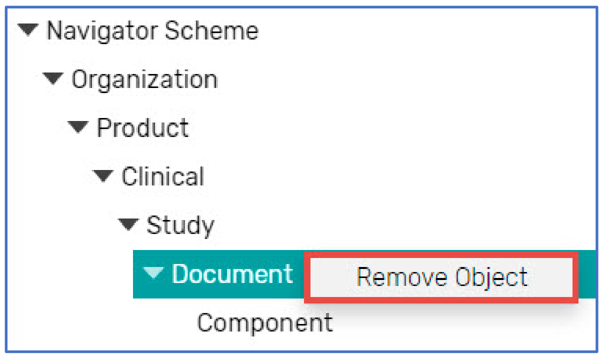
2. Identify the parent object to add a child object to (if no scheme exists yet, the user must select **Navigator Scheme** first), then drag and drop the desired child object on top of the parent (eg, drag **Product** on top of **Organization**).



3. Repeat Step 2 until all child objects are added, as applicable.
4. Once all objects have been added to the **Navigator Scheme**, click **Save**.



5. To remove an object from the **Navigator Scheme**, right-click on it, click **Remove Object**, and click **Save**.

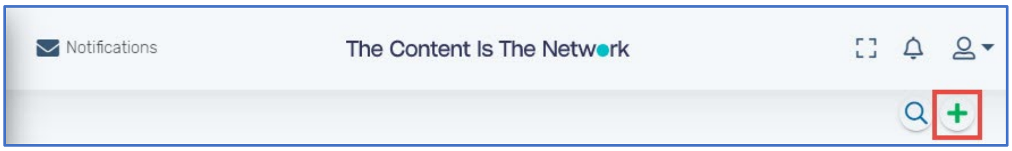


5. CONFIGURING NOTIFICATION TEMPLATES

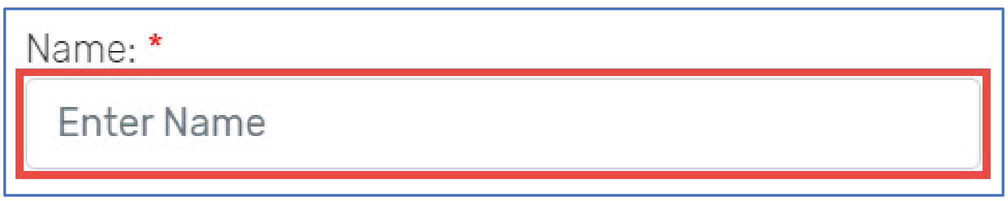
Notification templates are created to support the email and/or console notifications that are sent out by the system, configured by users with administrative privileges, and/or task originators (see **User Guide Module 9, Section 1.1.1**). Templates can be used for various notification types such as task assignments and self-subscribed business object event notifications (eg, when a document is updated).

5.1 CREATING A NEW NOTIFICATION TEMPLATE

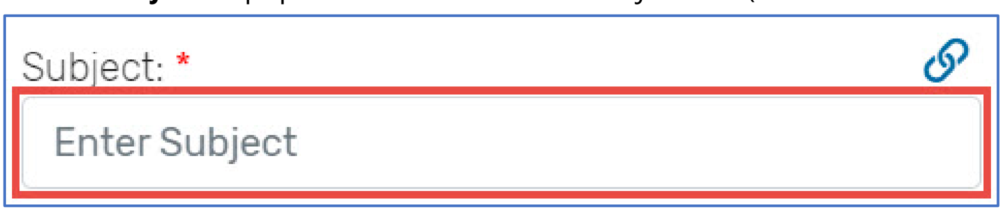
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Notifications**.
2. Click **add icon** + to create a new notification template.



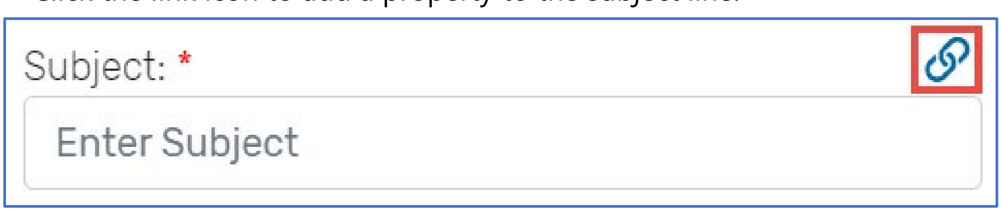
3. Enter the template **Name** (it is recommended to use something descriptive to easily identify the type of notification).



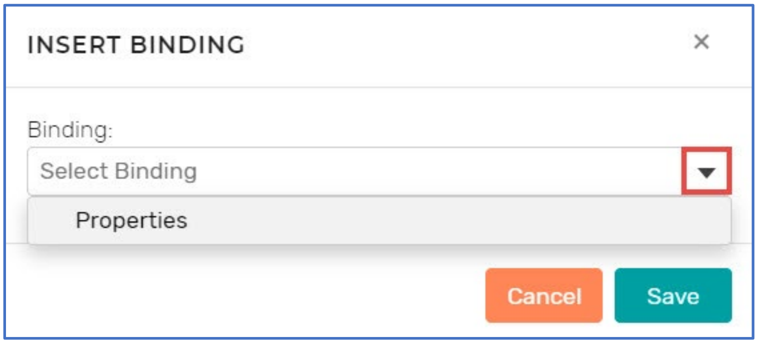
4. Enter the **Subject** to populate the notification's subject line (for email notifications).



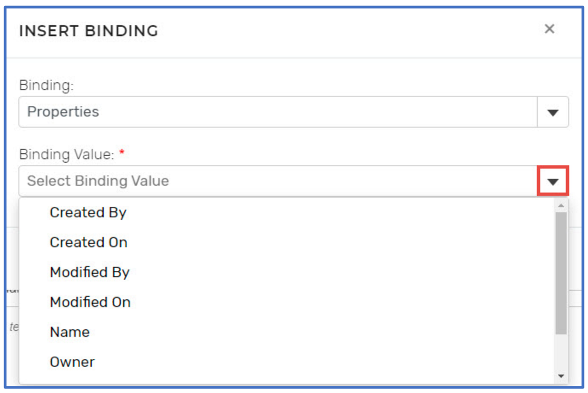
5. If needed, add a dynamic property to the **Subject** as follows:
   a. Click the link icon to add a property to the subject line.



b. Click the drop-down arrow to select the **Binding** type (eg, Properties, or contextual information) to insert into the subject line.

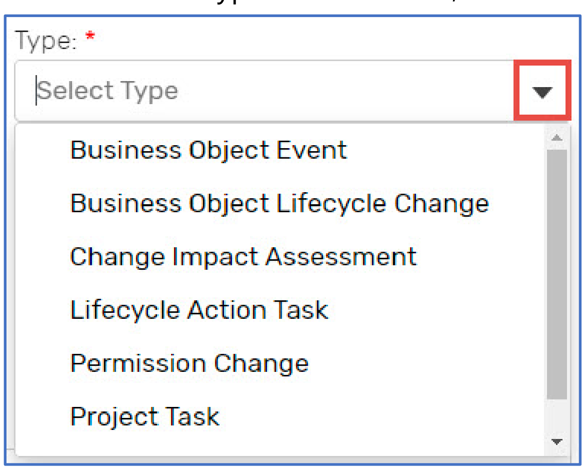


c. Click the **Binding Value** arrow to select the value to insert and click **Save**.



> **Note:** The available binding values will be based on the selected **Binding** type and/or business object (see Step 5b above). A business object (eg, **Document**, **Component**) must first be selected before its related properties are available for insertion.

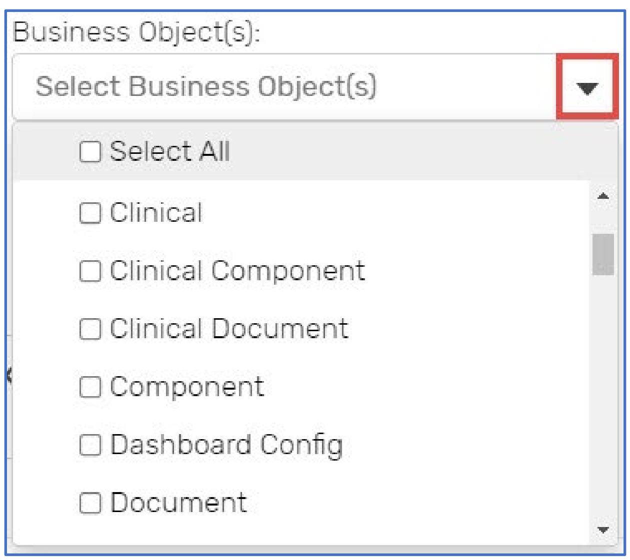
6. Click the **Type** arrow to select the type of notification, listed below.



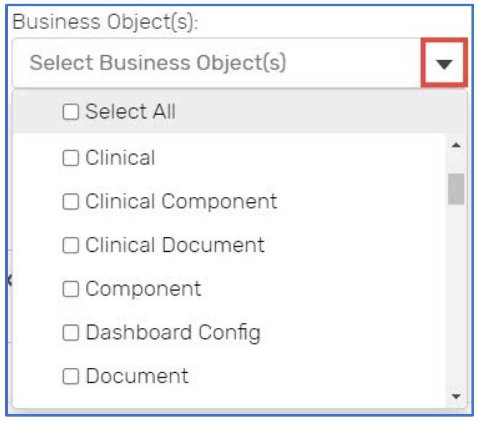
- **Business Object Event** - for self-subscribed business object creation, update, and deletion event notifications
- **Business Object Lifecycle Change** – for self-subscribed business object lifecycle change notifications
- **Change Impact Assessment** – for change impact assessment (included in task form) notifications; Note that only 1 notification template of this type can be added
- **Lifecycle Action Task** – for task and other notifications associated with lifecycle transitions
- **Permission Change** – for permission change notifications (a system notification is sent by default)
- **Project Task** – for project-related task notifications
- **Task Reminder** – for lifecycle task reminder notifications (a system notification is sent by default or on demand)

  Note: At least 1 notification template must be created for **Change Impact Assessment** and **Task Reminder**. The **Permission Change** type is not currently linked to any notification, so a notification of this type is not needed.

7. Click the **Business Object(s)** arrow to select the type of objects for which the notification will be used (eg, **Document**, **Component**). If multiple objects are selected, the content of the notification must be kept generic enough to suit all the objects.

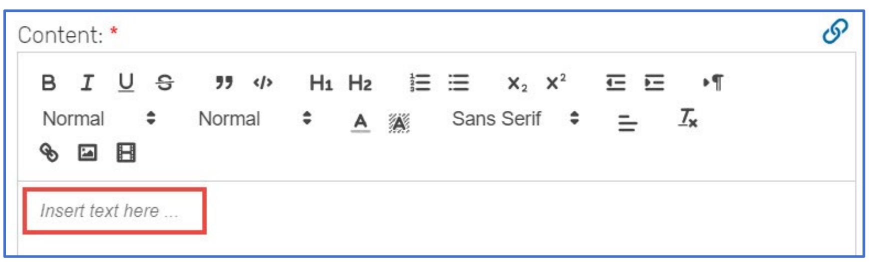


8. Click the **Default Business Object(s)** arrow to select the type of objects for which the notification will be displayed in the self-subscribed notifications (see the **InteliNotion User Guide Module 12** for details on how a user may self-subscribes to these notifications).

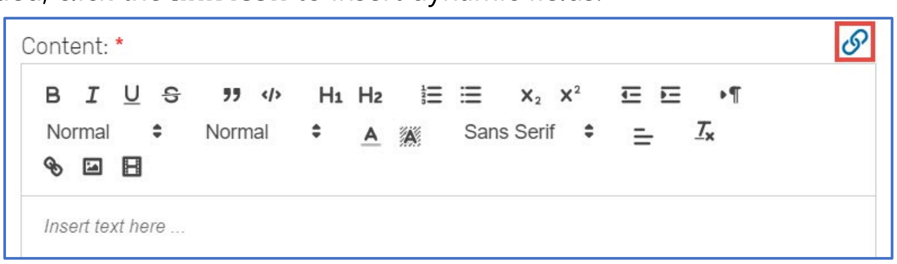


> **Note:** The **Default Business Object(s)** setting is relevant for the **Business Object Event** and **Business Object Lifecycle Change** types only (ie, those for which self-subscribed notifications are available). A **Default Business Object(s)** can only be selected if it has already been selected for **Business Object(s)** (Step 7).

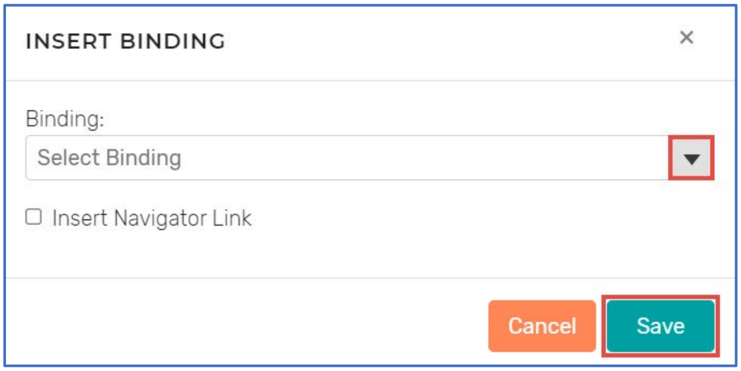
9. Enter the content to appear in the notification's body, using the text editing buttons as needed.



10. If needed, click the **link icon** to insert dynamic fields.



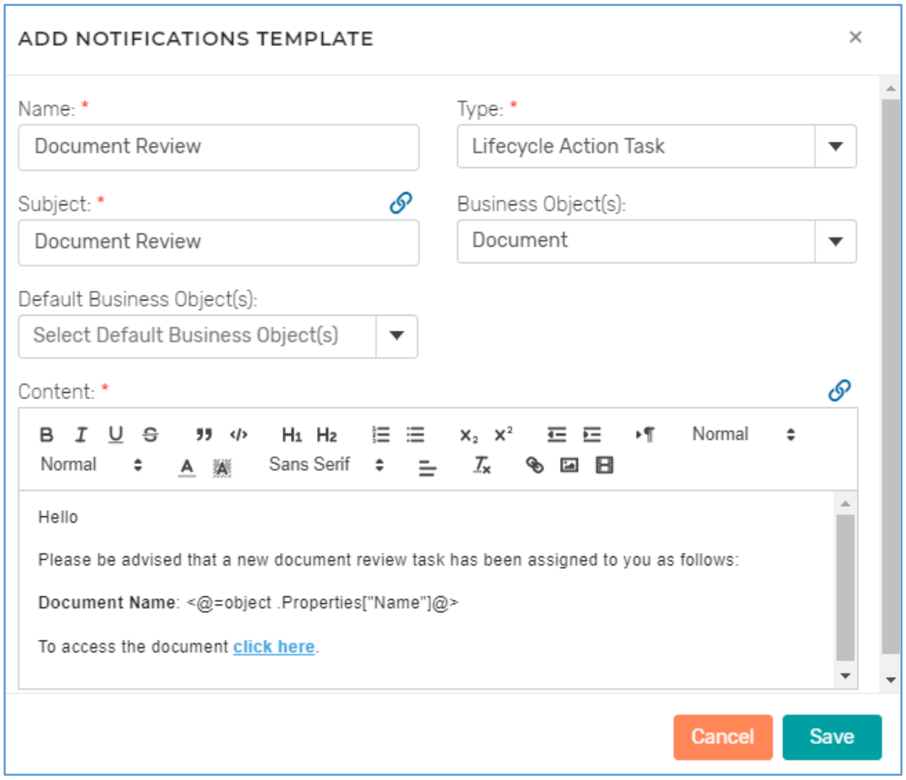
11. To include a direct link to either open a **Navigator** view of the object in the *Web Console* or download the object (eg, **Document**) itself, click the relevant checkbox (it is recommended to choose this option when binding **Properties-Name**).



12. To add information related to a task (eg, task's due date, etc.), select the **Task** business object, insert the necessary task-related information, and change the business object back to the one for which it will be used (eg, **Document**, **Component**).
13. To insert a direct link to open the document in co-authoring, if applicable, add a new temporary notification template and complete the following actions:
    a. Select Type = Lifecycle Action Task and Business Object(s) = Document
    b. Click the insert binding link
    c. Select Binding = Properties and Binding Value = Name
    d. Click the Insert CoAuthor Link checkbox, and click Save
    e. Copy the inserted URL and paste into relevant other notification template(s), as applicable

14. Click **Save**.

Note: For reference, here is a sample document review task **Notification Template**:

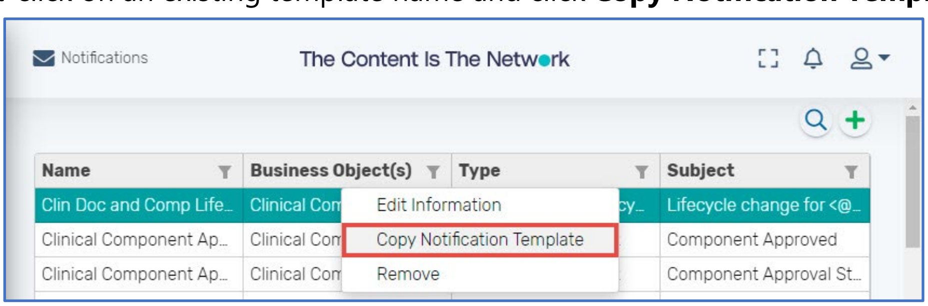


15. Repeat Steps 2-13 until all required notification templates are configured (this can be done all at once, or if/when a new template is required).

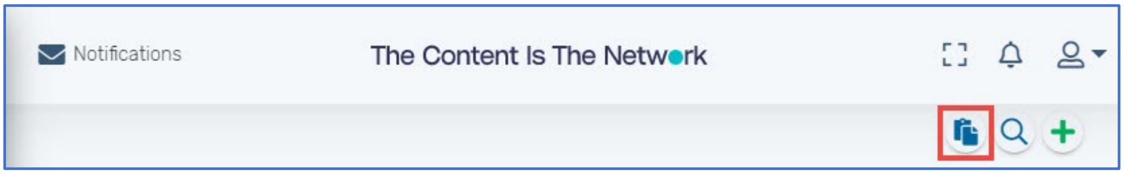
5.2 CREATING A NOTIFICATION TEMPLATE USING AN EXISTING TEMPLATE

A notification template can be created with the help of an existing notification template. Using the **Copy Notification Template** function, any business object can use an existing notification template to create a new notification template for another business object.

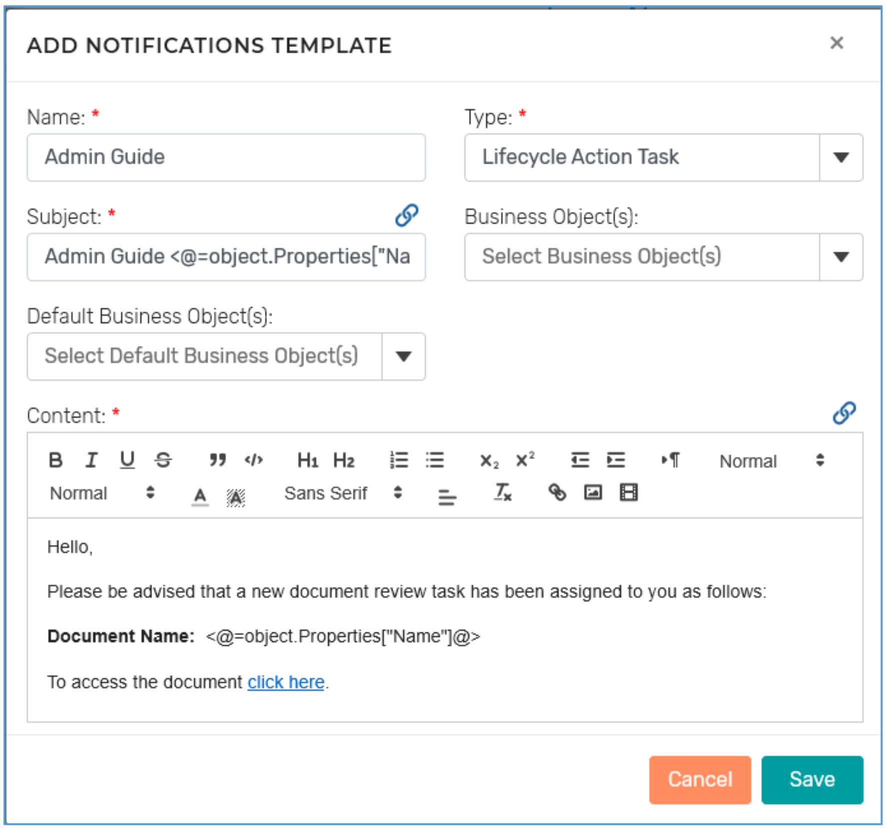
1. Right-click on an existing template name and click **Copy Notification Template**.



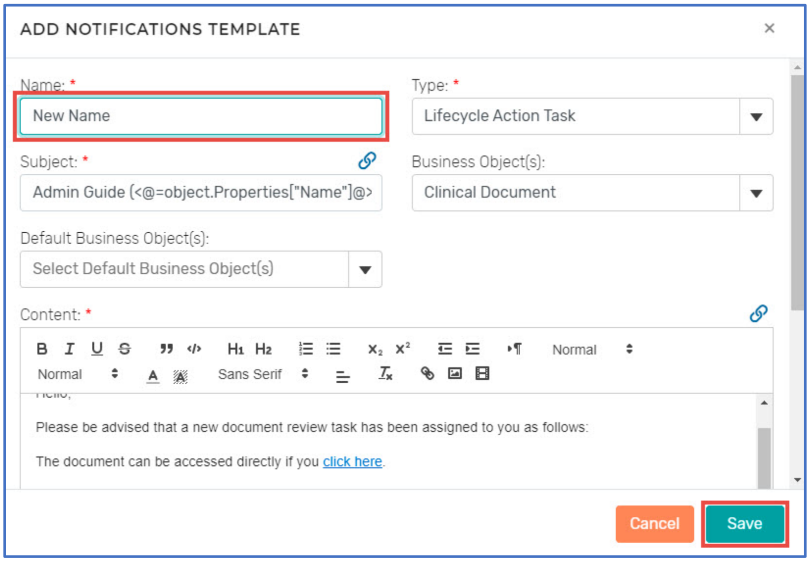
2. Click on the **Create from copy icon** at the top-right corner of the screen.



3. The **Add Notifications Template** form will display with fields copied from the existing template.



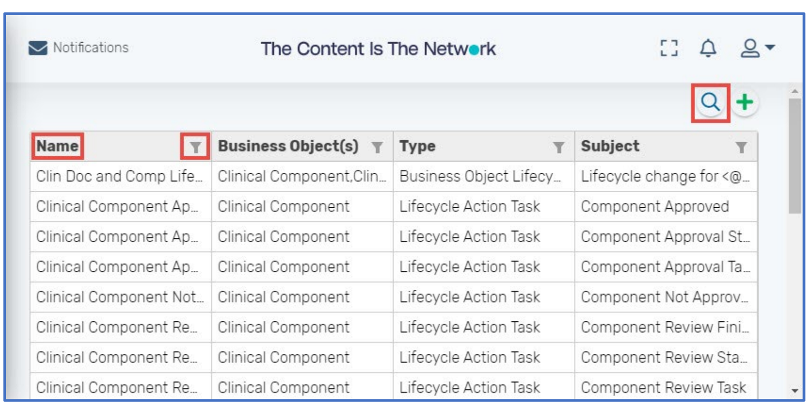
4. Change the **Name** of the copied notification template so it is unique for the new template. Modify other fields, as needed, and click **Save**.



5.3 MANAGING NOTIFICATION TEMPLATES

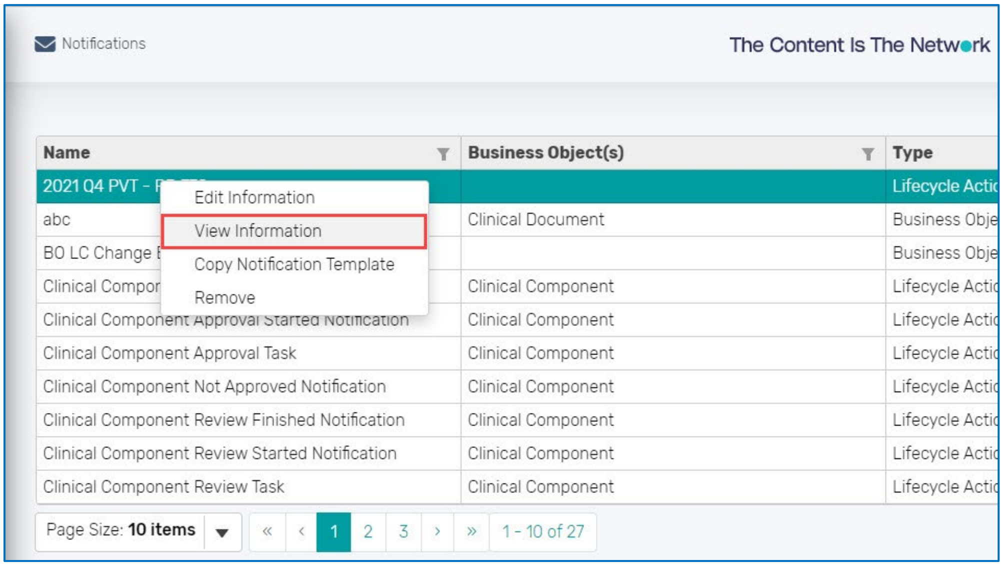
All notification templates are displayed in a grid with sorting and filtering capabilities, making it easy to find an existing template. Keyword text search is also available to assist in finding a template.

1. Click anywhere in a column heading to sort all rows alphabetically, either in ascending or descending order.
2. Click the **Filter icon** in the column heading to display filter options.
3. Click the **Search icon** to open the search box. Enter full or partial text and click the smaller search icon within the text field.

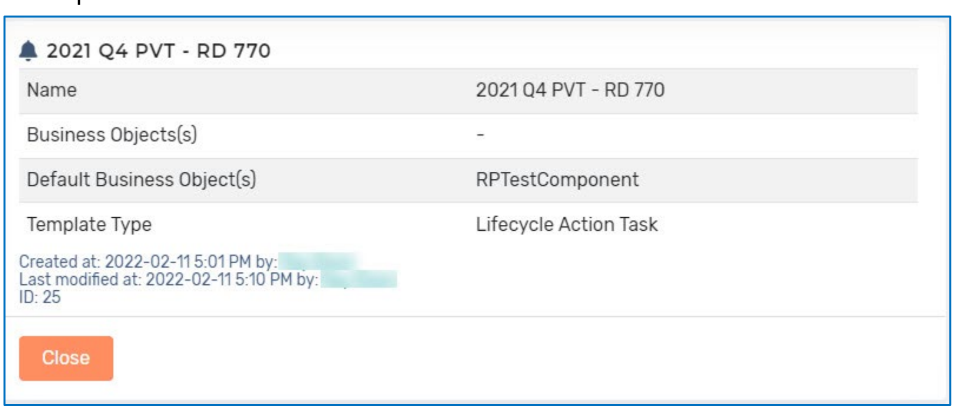


It is also possible to view the information for an existing template by following the steps listed below.

1. Right click on the name of the applicable template and select **View Information**.



2. A screen showing the following information will display.
   a. Name
   b. Business Object(s)
   c. Default Business Object(s)
   d. Template Type
   e. Creation date and user
   f. Last modified date and user
   g. Unique ID



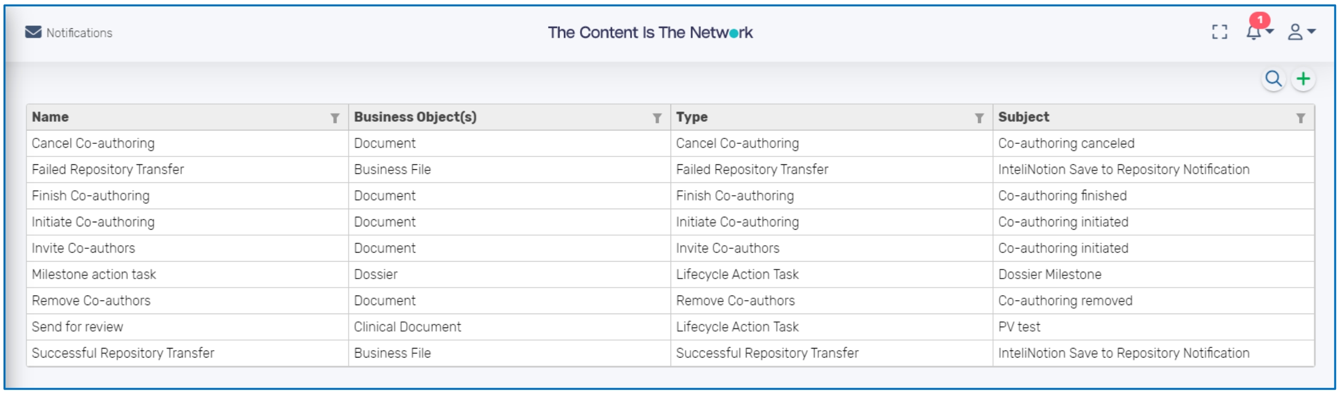
3. Click the **Close** button to return to the notification template screen.

5.4 UPDATING OR DELETING A NOTIFICATION TEMPLATE

To update or delete a notification template, follow the steps listed in the sections below.

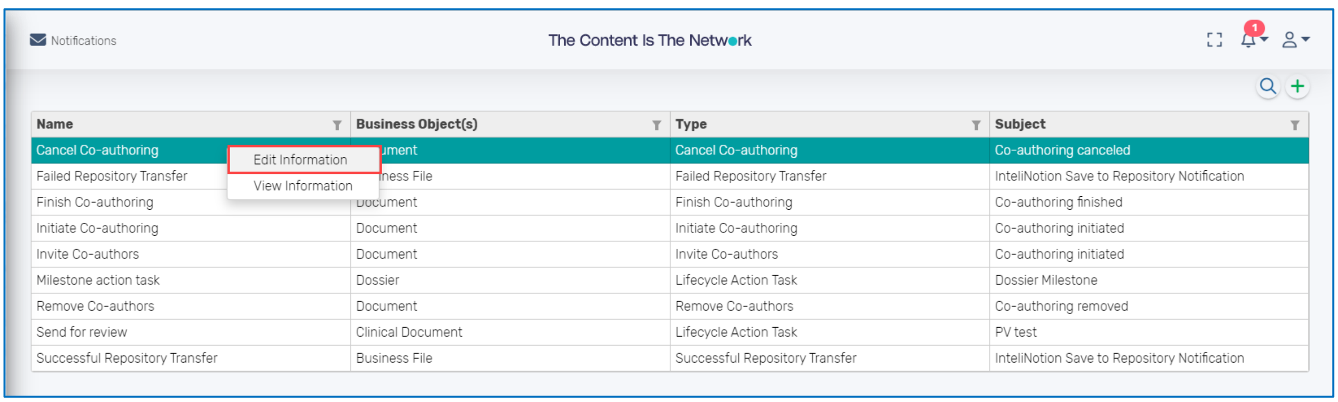
5.4.1 Updating a Notification Template

1. In the *Web Console*, hover over **Settings**, and select **Notifications**.
2. The Notifications templates table will display.



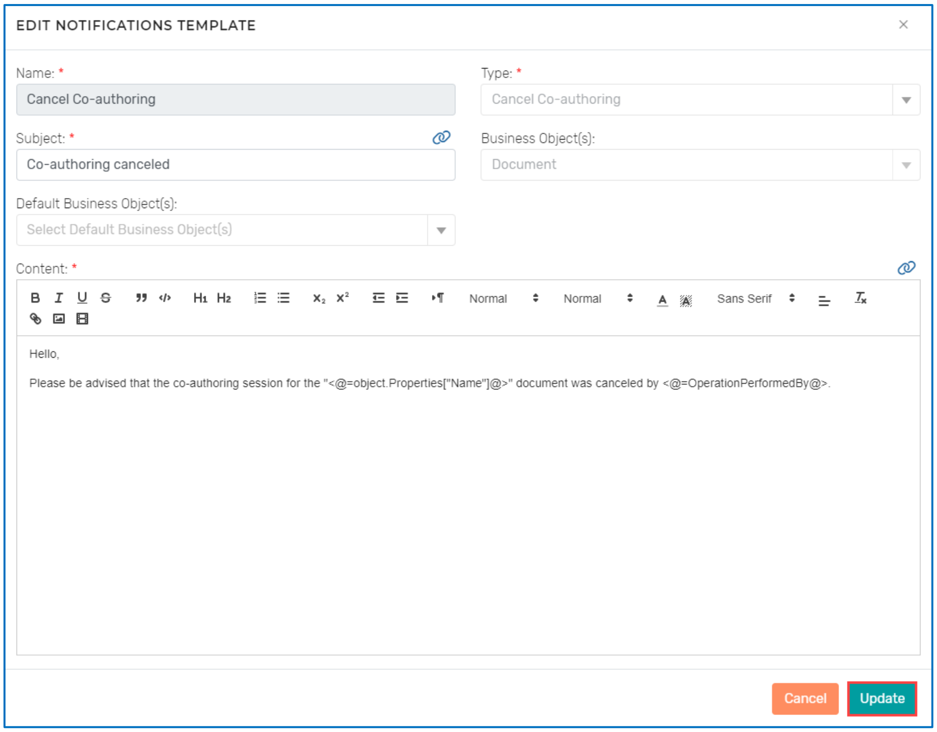
Name	Business Object(s)	Type	Subject
Cancel Co-authoring	Document	Cancel Co-authoring	Co-authoring canceled
Failed Repository Transfer	Business File	Failed Repository Transfer	InteliNotion Save to Repository Notification
Finish Co-authoring	Document	Finish Co-authoring	Co-authoring finished
Initiate Co-authoring	Document	Initiate Co-authoring	Co-authoring initiated
Invite Co-authors	Document	Invite Co-authors	Co-authoring initiated
Milestone action task	Dossier	Lifecycle Action Task	Dossier Milestone
Remove Co-authors	Document	Remove Co-authors	Co-authoring removed
Send for review	Clinical Document	Lifecycle Action Task	PV test
Successful Repository Transfer	Business File	Successful Repository Transfer	InteliNotion Save to Repository Notification

3. Either double-click anywhere in a notification template's row, or right-click on the template name and click **Edit Information**.



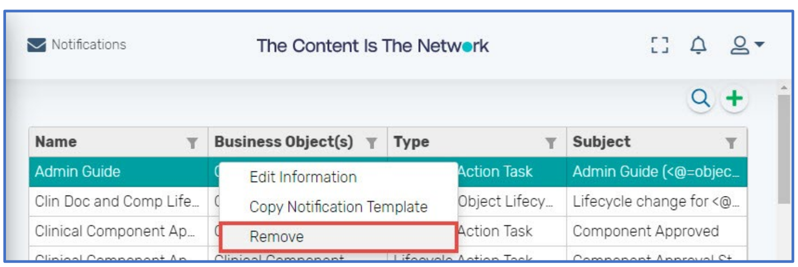
Name	Business Object(s)	Type	Subject
Cancel Co-authoring	ument	Cancel Co-authoring	Co-authoring canceled
Failed Repository Transfer	ness File	Failed Repository Transfer	InteliNotion Save to Repository Notification
Finish Co-authoring	Document	Finish Co-authoring	Co-authoring finished
Initiate Co-authoring	Document	Initiate Co-authoring	Co-authoring initiated
Invite Co-authors	Document	Invite Co-authors	Co-authoring initiated
Milestone action task	Dossier	Lifecycle Action Task	Dossier Milestone
Remove Co-authors	Document	Remove Co-authors	Co-authoring removed
Send for review	Clinical Document	Lifecycle Action Task	PV test
Successful Repository Transfer	Business File	Successful Repository Transfer	InteliNotion Save to Repository Notification

4. The **Edit Notifications Template** form will display showing the existing information pre-populated. Modify the template's information as needed and click **Update**.

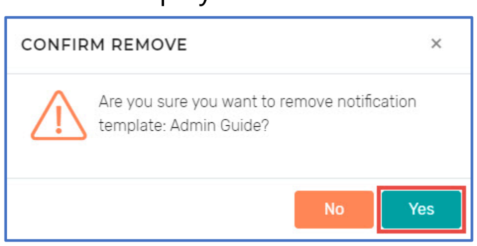


5.4.2 Deleting a Notification Template

1. Right-click anywhere in the applicable notification template's row and click **Remove**.



2. A confirmation pop-up box will display. Click **Yes** to delete the template.



Note: A notification template that is bound to a lifecycle transition cannot be deleted.

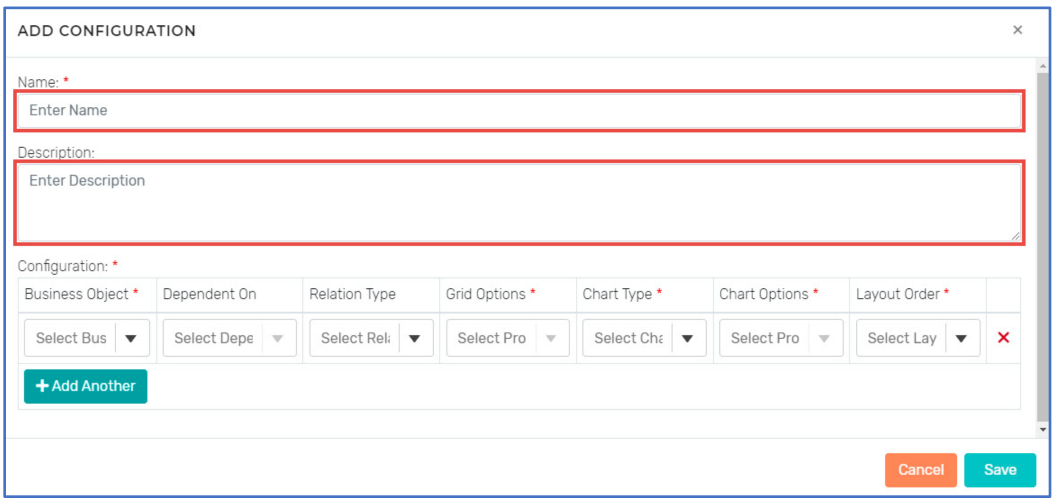
6. DASHBOARD MANAGEMENT

Dashboards can be configured to display various information for different objects. This information can be used for tracking, metrics, and reporting.

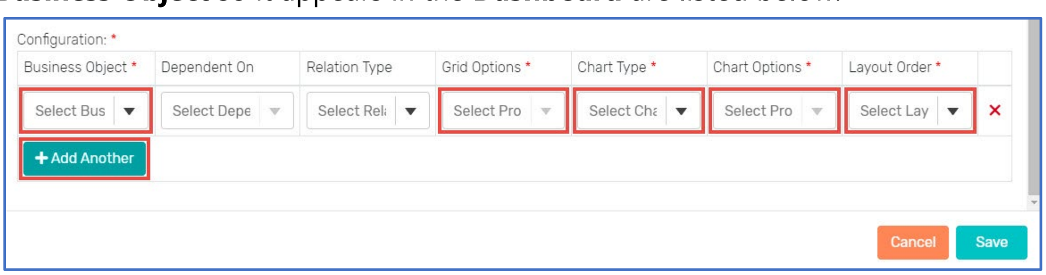
6.1 CONFIGURING A DASHBOARD

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Dashboards**.
2. Click the **add icon** + to add a new dashboard.

3. Enter a **Name** and **Description** for the dashboard (if desired).

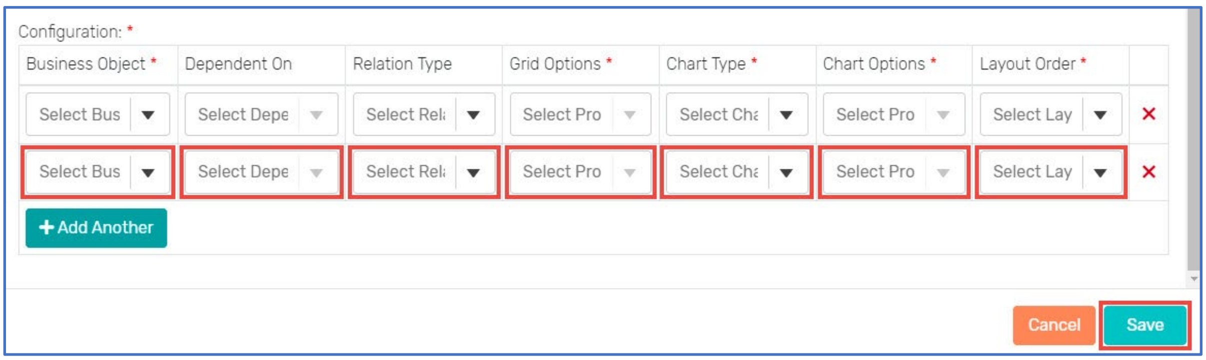


4. Click the **Business Object** arrow to select the highest parent object to be displayed at the top of the dashboard, and then select the preferred **Grid Options**, **Chart Type**, **Chart Options**, and **Layout Order**; then click **+Add Another**. Specific conditions for adding a **Business Object** so it appears in the **Dashboard** are listed below.



- The first object selected should be the one to be displayed at the top of the dashboard; the **Layout Order** for this item will be 1.
- The first object does not require a value to be selected for **Dependent On** or **Relation Type**.
- Subsequent objects should be children of the first object, as configured in the **Navigator Scheme**, and each child must be included in the dashboard in the same order, or some values may not populate in the dashboard (eg, **Product**, **Study**, **Document**, and **Component** objects must be included for the component-level data to be displayed).

5. In the new row, click the **Business Object** arrow to select the next object to be displayed in the dashboard (eg, **Study**), then select the **Dependent On** (eg, Product) value, and select the preferred **Grid Options**, **Chart Type, Chart Options,** and **Layout Order**.



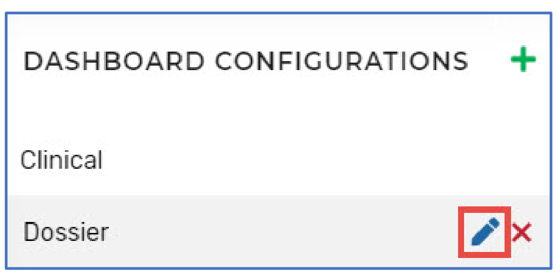
6. Click **+Add Another** and repeat Step 5 until all objects are added to the dashboard. Click **Save**.

6.2 UPDATING OR DELETING A DASHBOARD

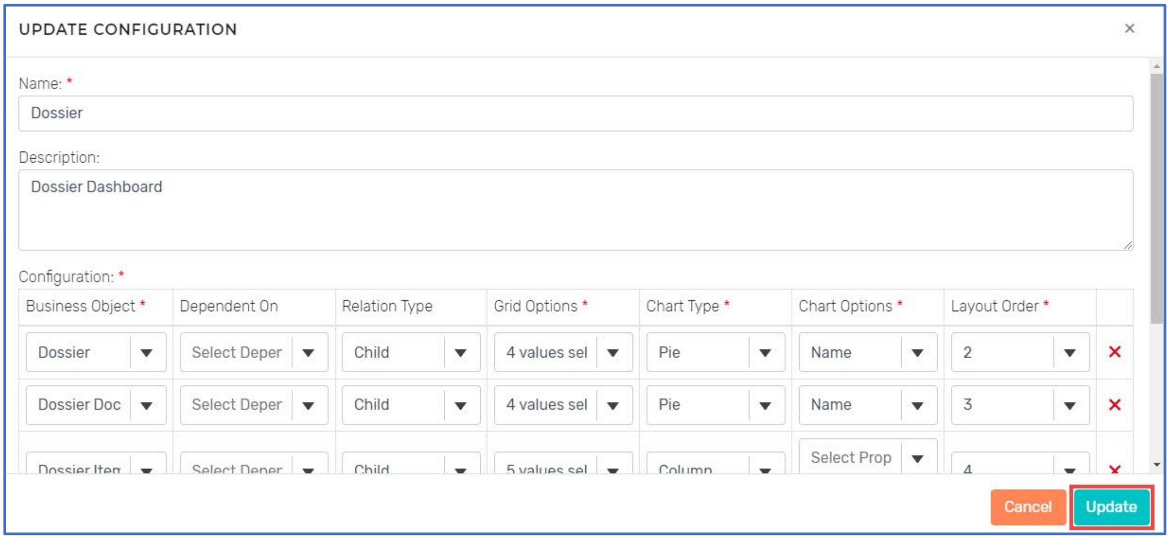
To update or delete a dashboard, follow the steps listed in the sections below.

6.2.1 Updating a Dashboard

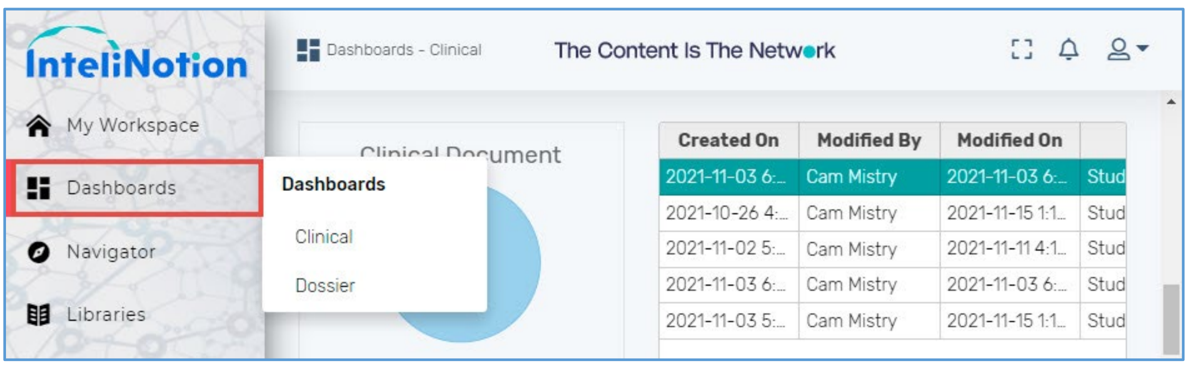
1. Hover over the dashboard name and click the **Edit icon** .



2. Make any required changes and click **Update**.

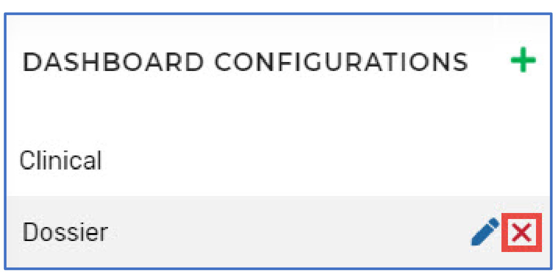


3. To view the dashboard to ensure its settings are as expected, hover over **Dashboards** in the left-hand navigation pane of the *Web Console*. Available dashboards can be selected by clicking on a dashboard name.



6.2.2 Deleting a Dashboard

Hover over the dashboard name and click the ✕ **icon** to delete it.



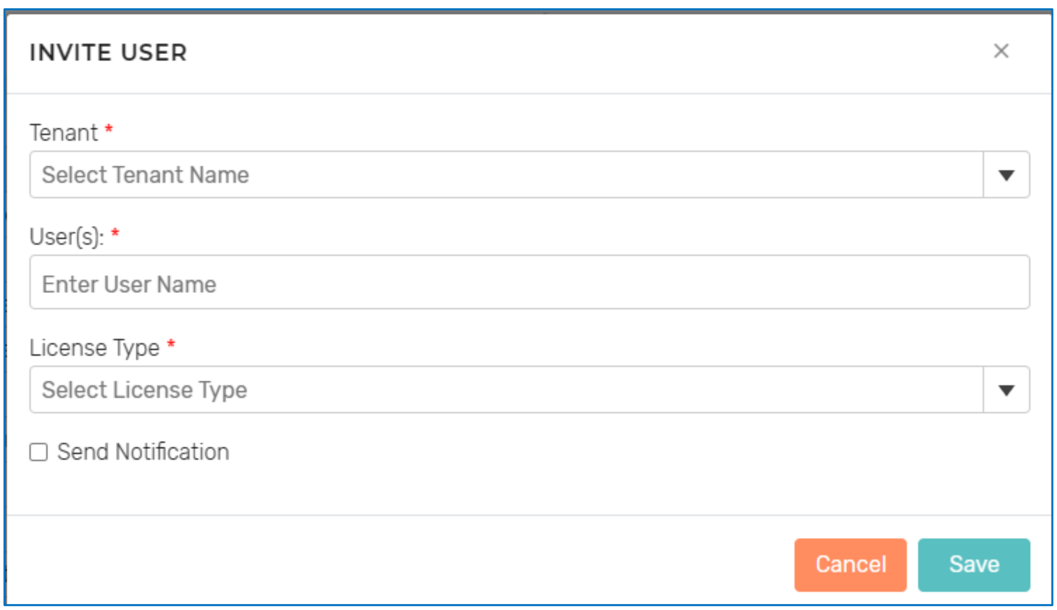
7. CONFIGURING ACCESS CONTROL

Access control can be implemented by building several teams, creating roles for each team, configuring different access permissions for each role, and then adding users to the roles. Before a user can be added to a role, however, he/she must be added to the system. This can be managed a single user at a time, or by bulk importing and inviting new users via comma-delimited (CSV) file.

7.1 INVITING A SINGLE USER

To add a user to the system, he/she must first be invited to join.

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Users**.
2. Click the **add icon** to invite a new user to the system.
3. An **Invite User** form will appear.



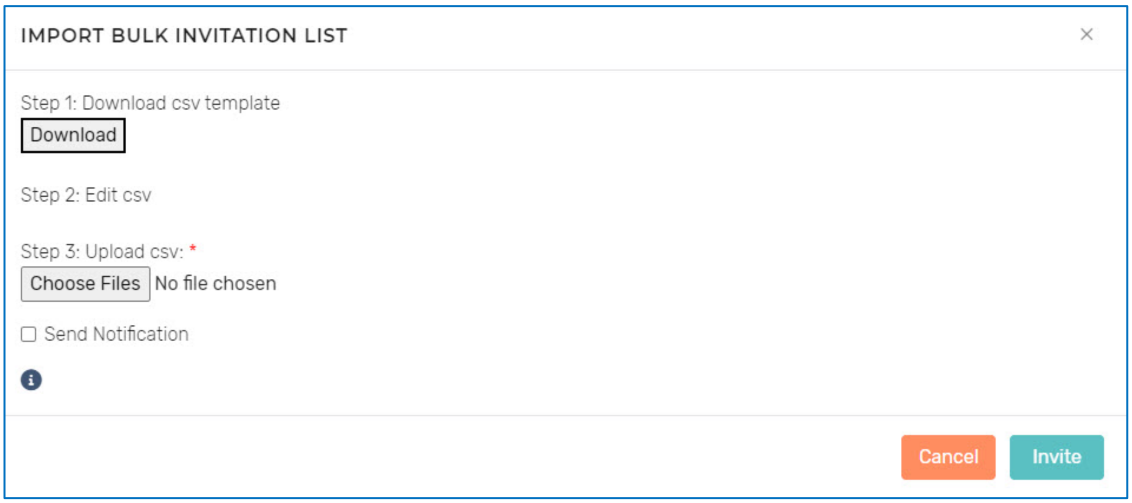
4. Select the organization or company directory from the **Tenant** drop-down.
5. Type in the first few characters of the user's first name, last name, or email address, and select the appropriate name from the list of displayed matches.
6. Select the **License Type**.
7. Check the **Send Notification** box (to send an email notification to the users) and click **Save**.

Note: Only users with an admin or support team type role can invite other users.

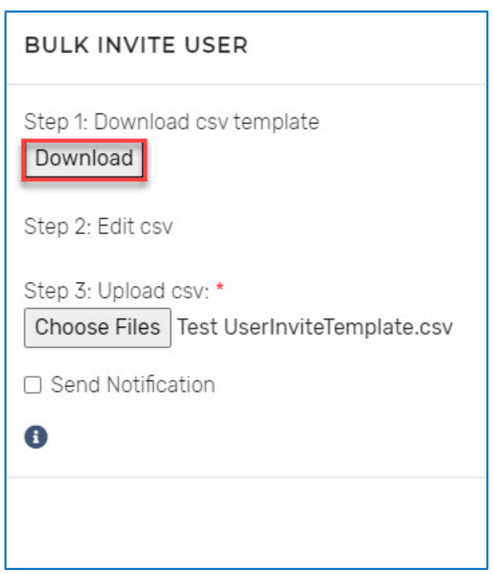
7.2 BULK INVITING/ACTIVATING USERS

To add users to the system, they must first be added to the system and invited to join.

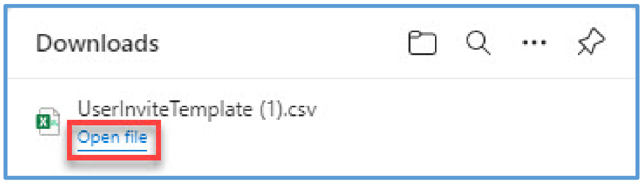
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Users**.
2. Click the  icon to bulk invite new users.
3. An **Import Bulk Invitation List** form will appear. Follow the steps listed under a. or b. below, as applicable.



   a. If a new CSV file needs to be created, click the **Download** button, and follow the steps listed below.

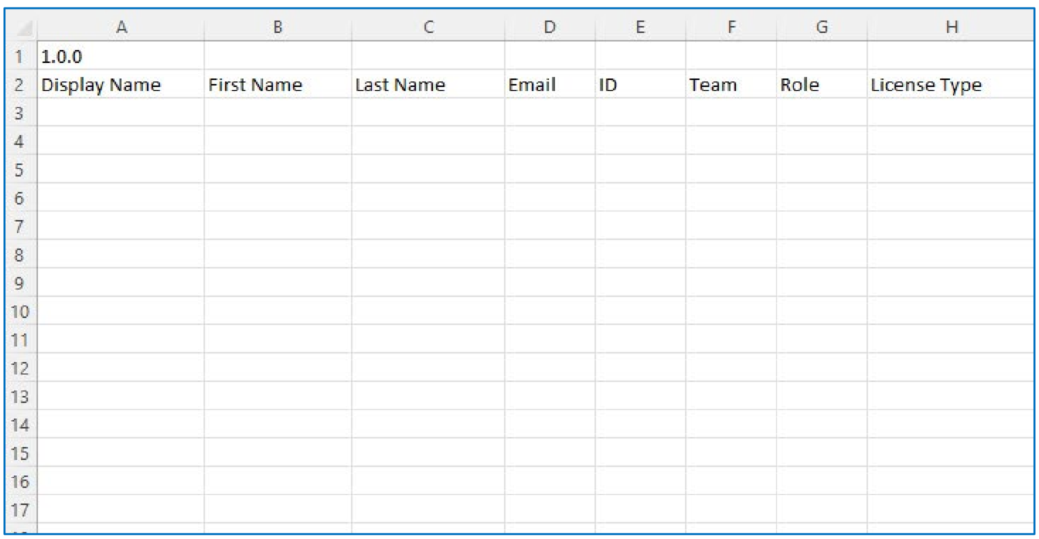


i. Click on the **Open File** to open the blank CSV file.



ii. Fill out the fields as listed below:

- **Display Name** – name displayed throughout the system
- **First Name** – first name of user
- **Last Name** – last name of user
- **Email** – valid email address
- **ID** – leave blank
- **Teams** – use the appropriate quarterly release year and quarter
- **Roles** – author or user
- **License Type** – creator



	A	B	C	D	E	F	G	H
1	1.0.0							
2	Display Name	First Name	Last Name	Email	ID	Team	Role	License Type
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
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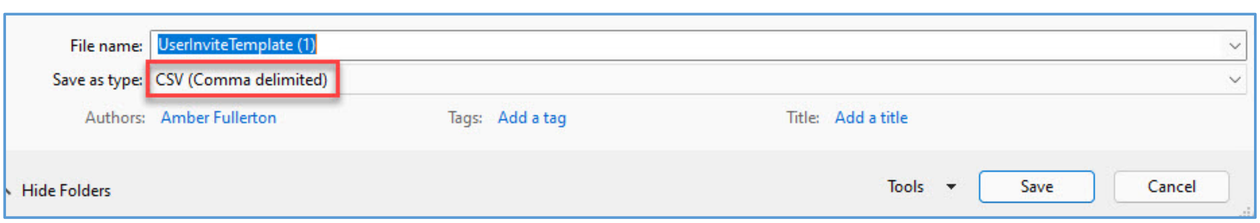
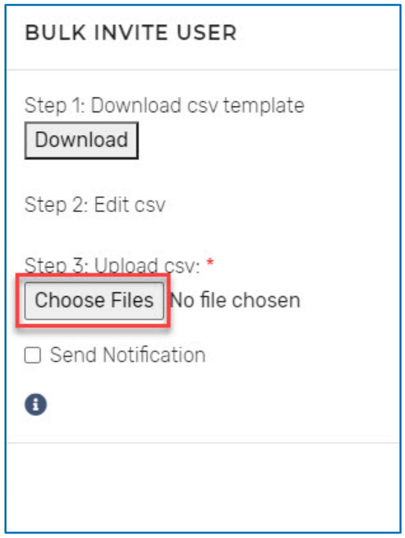
17								

iii. Once complete, save the file, ensuring that the file type selected is CSV.



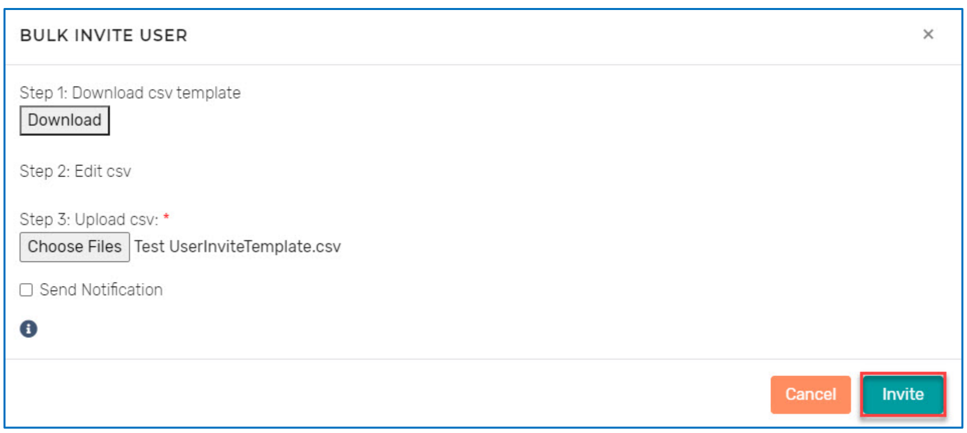
b. Follow the steps listed below to upload the newly created CSV file.

    i. If the CSV file has already been created, click the **Choose Files** button.



    ii. A Windows Explorer form will open, navigate to the correct file and open it.

    iii. The **Bulk Invite User** form will now show the uploaded csv file. Click **Invite Users**.

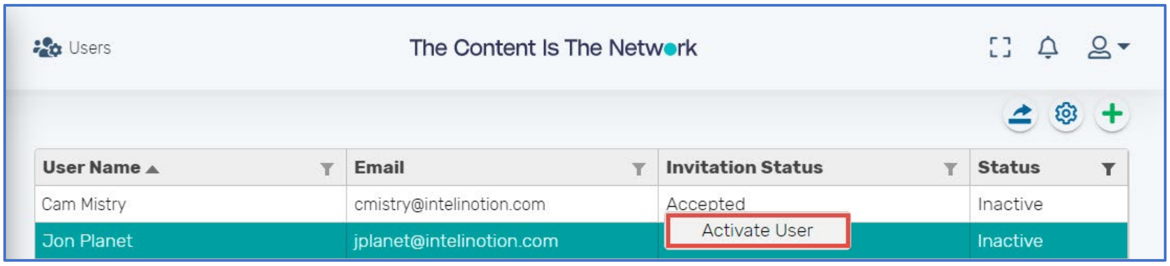


> **<u>Note:</u>** If applicable, check the **Send Notification** box to notify new user that they have been added.

3. The new users will now be listed under **Users** in *InteliNotion*.

7.3 DEACTIVATING/ACTIVATING A USER

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane, scroll down, and click **Users**.
2. To deactivate an active user, right-click on the user's name and select **Deactivate User**. To activate an inactive user, right-click on the user's name and select **Activate User**.



Note: If a user is deactivated, he/she will not appear in the list of available users to select in various forms (eg, **Add User** [to a team], **Task Form**).

7.4 UPDATING THE INFORMATION FOR A USER

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane, scroll down, and click **Users**.
2. Right-click on the user's name and select **Edit Information**.
3. Update **Unique User ID**, **Dir Object ID** and/or **License Type** and click **Update**.

7.5 REMOVE A USER WITH INVITED STATUS

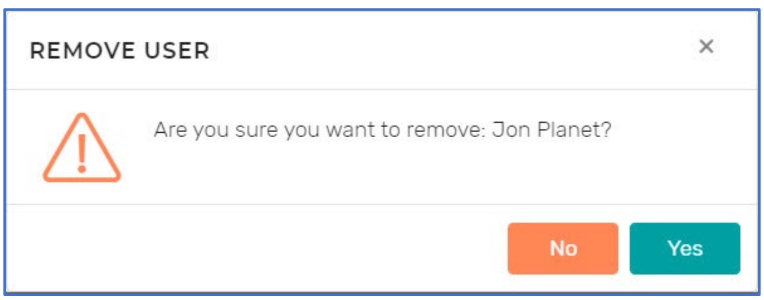
Users with Administrator access shall be able to remove a user from the system (via **Settings/Users**) if the user was previously invited to the system, but never accepted the invitation (ie, the user's **Invitation Status** is listed as **Invited**).

1. In the *Web Console*, click on **Settings** and **Users** in the left-hand navigation pane to display a list of all users.
2. Locate a user whose **Invitation Status** is listed as **Invited**.

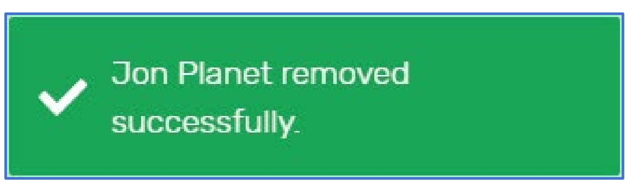
User Name ▲	Email	Invitation Status	Status
Bill Label	blabel@intelinotion.com	Accepted	Active
Cam Mistry	cmistry@intelinotion.com	Accepted	Active
Jon Planet	jplanet@intelinotion.com	Invited	Inactive

3. Right-click on the user whose invitation needs to be cancelled and choose **Cancel Invite**.

4. A confirmation message will display. Click **Yes** to cancel the invitation for the user.



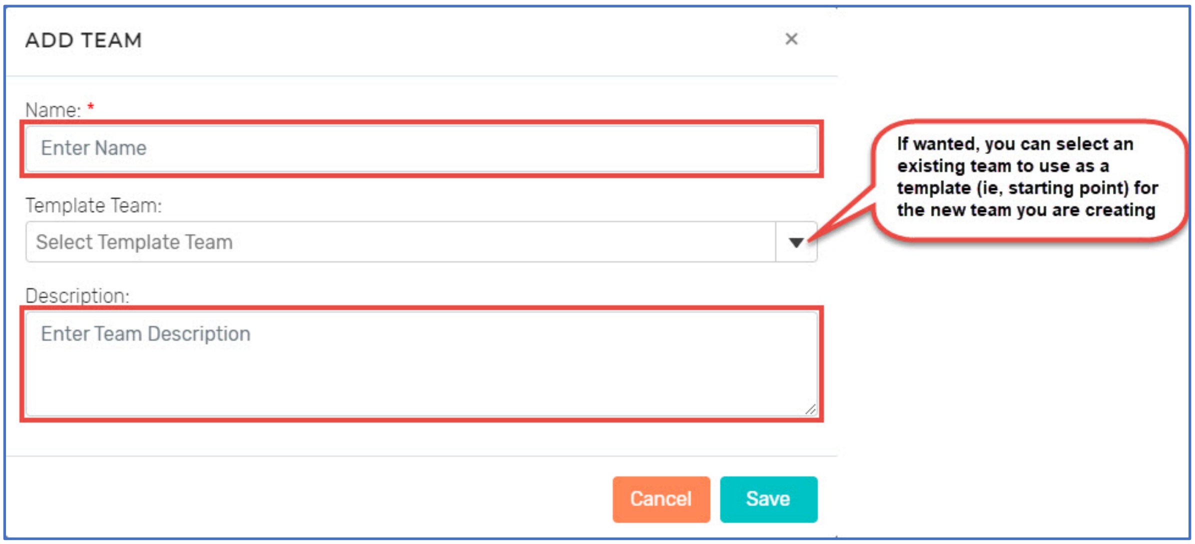
5. A user removed successfully message will display.



7.6 ADDING A TEAM

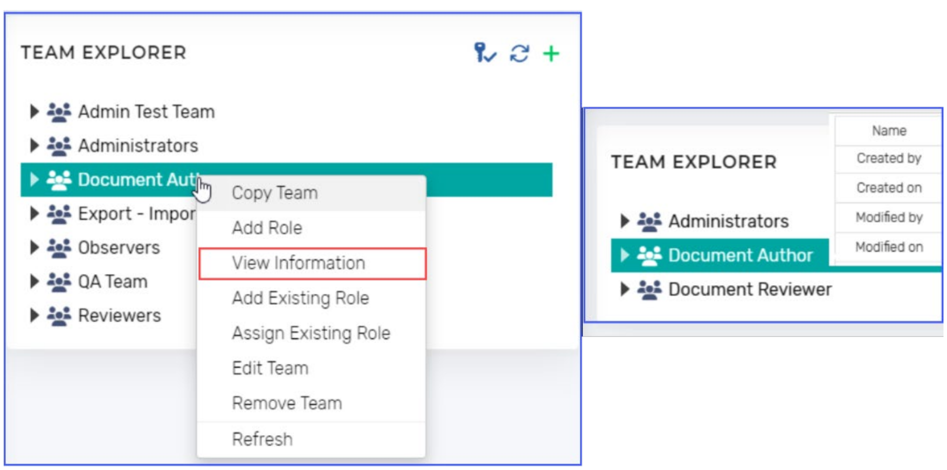
Follow the steps listed below to add a team.

1. Click **Teams** in the left-hand navigation pane of the *Web Console* and click on the **add icon** + to add a team.
2. Enter the **Name** and **Description** for the team and click **Save**.



Notes:

- A team may also be created by copying an existing team and modifying it, as appropriate. To do this, right-click on a team name and click **Copy Team**.
- Once a team has been created, information about that team is available by using the right click menu and selecting **View Information**, or by hovering over the applicable team.



7.7 ADDING A ROLE TO A TEAM

Adding a role to a team, unless granting full permissions, includes granting both access level and functional permissions to users. See below for a list of functional permissions available for configuration (access level is explained instep 4b).

Notes: When configuring an admin user role, it may be necessary to configure relevant access level for the applicable business object class along with functional permissions (eg user will need both Templates functional permission along with CRUDO access for the template business object class).

- **API Documentation –** allows users to access Swagger API documentation.
- **Business Object Modeler –** allows users to view all the classes (eg: Business object and business file), its properties and state, the lifecycle of state; and allows the user to add new objects, manage objects, remove objects, and manage lifecycles.
- **Content Planner –** allows users to view already created content task planner, view information, view versions, validate content plan, reuse information (where used), view audit logs, edit information, view tasks, and remove the created content task plan.

  Note: The related **Planner** functionality is currently not available in the left-hand navigation pane of the *Web Console*. Therefore, the selection of this permission will not have a functional impact on a user's permissions.

- **Content Tagging –** allows users to add content tags, component tags, view the information, edit information, remove content tags and component tags.
- **Content Task Plans –** allows users to view the edit content task plan, and content task plan table buttons after opening the created dossier.
- **Dashboard Settings –** allows users to add dashboard configurations, edit, and remove the created dashboard.
- **Document Ingestion Management –** allows users to view the Document Ingestion Process option in the Utilities menu.

  Note: This functional permission controls whether or not users have the ability to view the right-click *Web Console* menu option **Word Document (.docx with the ability to import)**.

- **Dossier Compilation –** allows users to add the files (InteliNotion Document, File System, Using External Repository) to the dossier item.
- **Export/Import –** allows users to view the export/import option in the Utilities menu, add new export job (user can export all the objects), download, and remove the exported file.

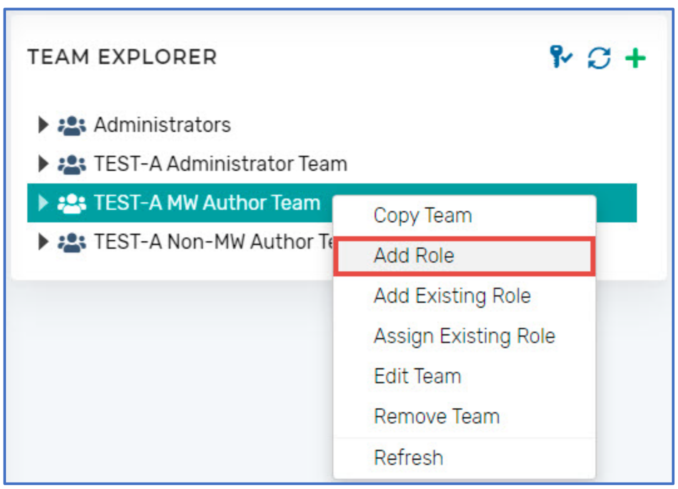
- **External Connectors –** allows users to view the External Connectors option in the settings menu, add a new connector instance, View information, Edit information, Remove, and Define document types of the created connector instance.
- **General Application Settings –** allows users to do various customization tasks, including adding custom header logos, customizing broadcast announcements, configuring limits on number of revisions, favorites, and uploading the *InteliNotion* add-in.
- **Info Models –** allows users to view the Info Models tab in the InteliNotion pane, create new hierarchical set, and add the element/variables/metadata sourced variable/table element in the created hierarchical set.
- **Ingestion Profile Management –** allows users to view the Document Ingestion Profile option in the Utilities menu.
- **Manage Auditing –** allows users to add/view the Auditing option in the Settings menu, reset audit setting, enable/disable auditing, and Update audit configuration.
- **Manage Instructional Text –** allows users to add, remove, and update Instructional Text on business objects.
- **Manage Libraries –** allows users to add/edit libraries in the *InteliNotion* application if user does not otherwise have functional permission for libraries **but cannot create a new library**. In this case only the library owner can update their library, and the user is allowed to manage the library.
- **Manage Widgets User –** allows users to create and update widgets for business objects they have access to, and view custom widgets created in the system.
- **Metadata –** allows users to add/update/delete categories, sub-categories, values, define property sets, value relationship managers, export metadata catalogs, and import metadata catalogs.
- **Navigation Modeler –** allows users to configure the navigator schema.
- **Notification Template Settings –** allows users to add, edit, view, copy, and remove notification templates.
- **Recycle Bin –** allows users to configure/update the retention period.
- **Search –** allows users to view the search page in the platform and search for business objects and perform the search related operation for components in the documents.
- **Teams –** allows users to create and update new teams, check user permissions, copy teams, add roles, add existing roles, assign existing roles, remove teams, remove roles, add users, and remove users.
- **Templates –** allows users to view the created HS structure, and if the user has template business object permission, then user can also create a template.
- **Tenant Settings –** allows users to configure tenants in the system.

- **User Settings –** allows users to activate/deactivate other users, invite users, edit the user information, cancel invites, resend invitations, and export users.
- **View Audit Logs –** allows users to view audit logs.
- **View Non-managed Libraries –** allows users to view non-managed libraries created by different users in the system.
- **View Service Logs –** allows users to view service logs, and download the service logs

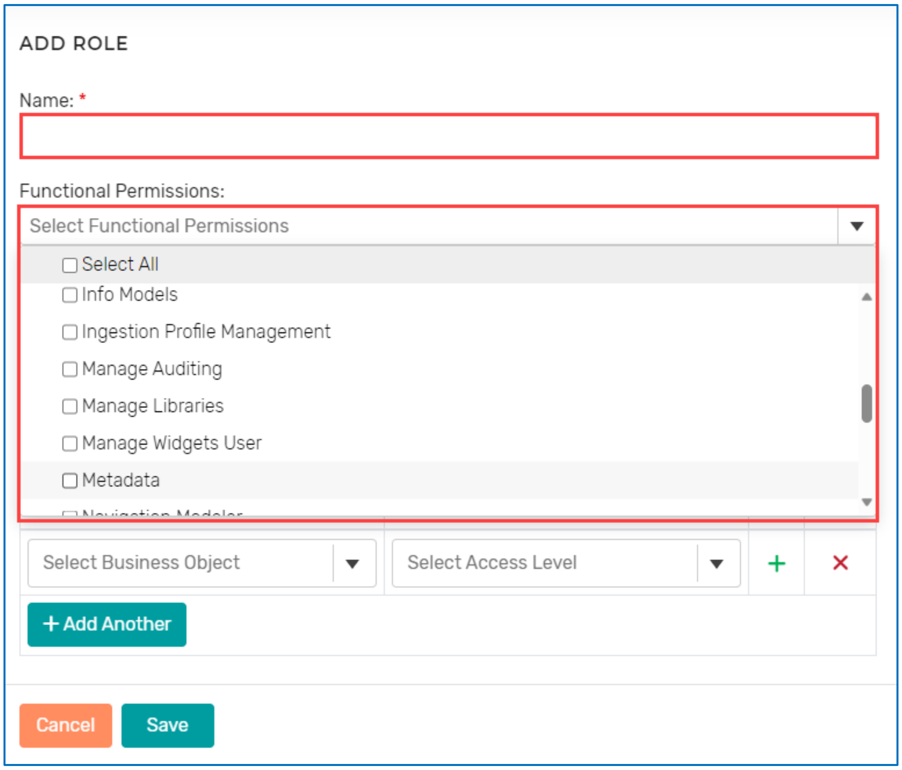
Follow the steps listed below to add a role to a team. One or more roles can be added individually as needed.

Note: Full control Admins will have access to the **Developer ribbon** in *MS Word*. This option will be disabled for all other users. Users with either Templates or Manage Libraries functional permission will have access to the Controls Group of the *InteliNotion* ribbon. When configuring a Role, a user's access to perform a search (via console or IN Word app), configure and view user-defined widgets, and view non-managed libraries controlled by separate functional permissions called 'Search,' 'Manage Widgets User,' and 'View Non-managed Libraries,' respectively.

3. Right-click on the team name and then click **Add Role** to add a role under the team.

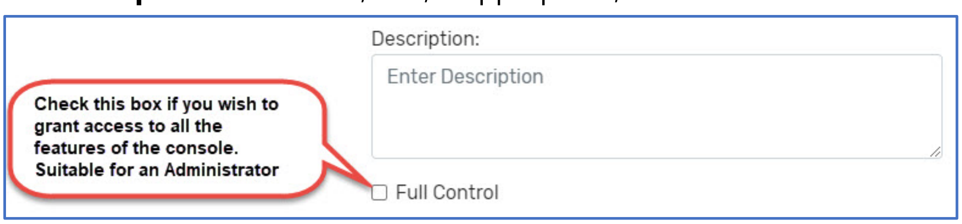


4. Enter the **Name** and select the **Functional Permissions** (eg, **Metadata**, **Info Models**, etc.) to be granted for the role.

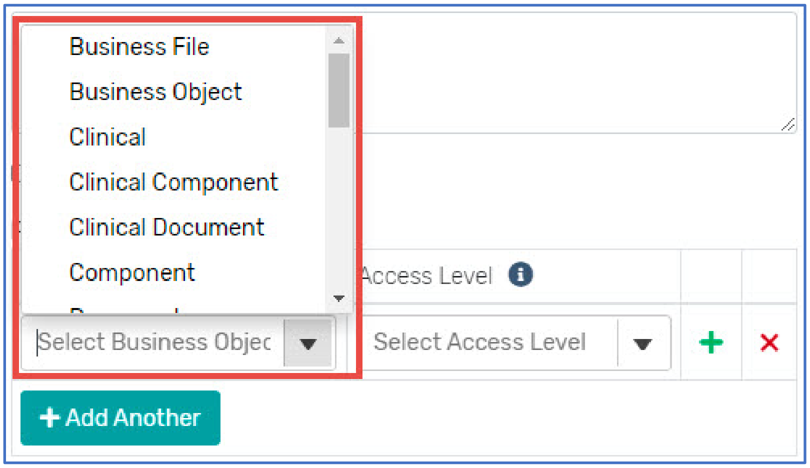


Note: If **Full Control** will be granted (see Step 3 below), individual functional permissions do not have to be selected. If individual functional permissions are granted, ensure that the relevant business object permissions are also added (see step 4 below)

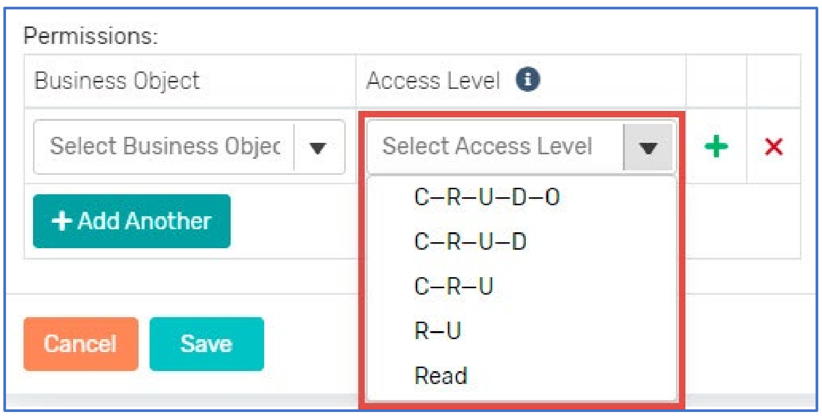
5. Enter a **Description** for the role, and, if appropriate, check the **Full Control** box.



6. Configure **Permissions** for the relevant business objects as outlined below.
   a. Select one of the listed business objects.



   b. Select the appropriate **Access Level**.



<u>Note:</u> Access Levels are as follows:

C – Create

R - Read

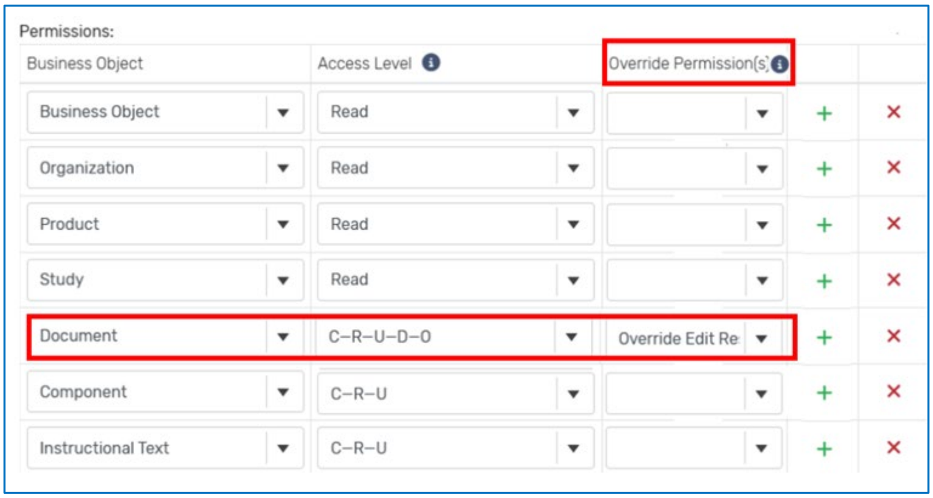
U - Update

D - Delete

O - Override - This enables the following actions: cancel checkout, cancel co-authoring, and override edit restriction.

   c. When configuring an admin user role with Teams functional permission, one or more of the following override permissions for a specified team and business object class, given that a business object class has the Override permission level (CRUDO), can be selected. Select the appropriate **Override Permission(s)**:

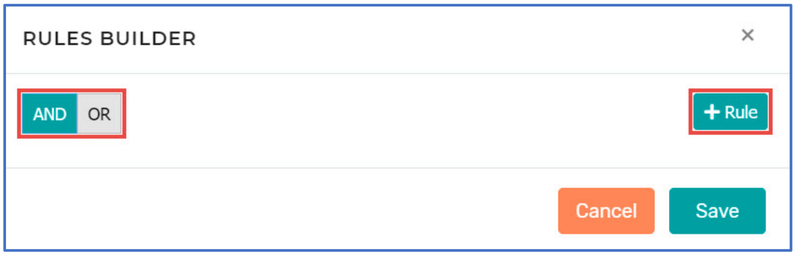
- Override Edit Restriction
- Add Co-author(s)
- Remove Co-author(s)
- Email Co-author(s)
- Interim Save
- Finish Co-authoring
- Discard/Cancel Co-authoring
- Cancel Check Out



<u>Note:</u> The system will validate user permissions and allow/deny the operation depending on business object class access associated with the instantiated business object (i.e., documents, components). For **Template** and **Component** business object classes, **only Cancel Check Out** action is applicable. An object checked out can always be cancelled without requiring a C-R-U-D-O access level. After an upgrade to an existing environment, override permissions are pre-selected for all C-R-U-D-O level business object class permissions. These permissions can be unselected to configure the role's intended use.

d. If needed, configure a rule for the role by clicking the **icon**.

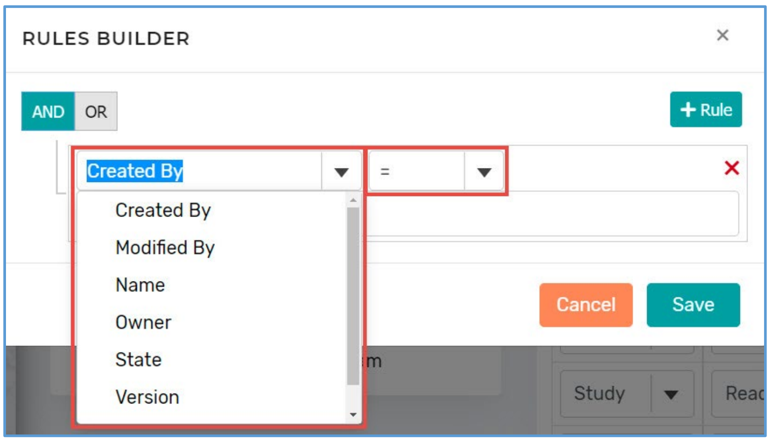
e. Select **AND** or **OR** for the type of expression and click **+ Rule**.



f. Select the relevant **Property** from the list.

g. Select operator as = (equal to) or != (not equal to).

h. Enter or select an existing value from the drop-down list, based on the selection made in Step f. Repeat Steps e-g, as needed, and click **Save**.



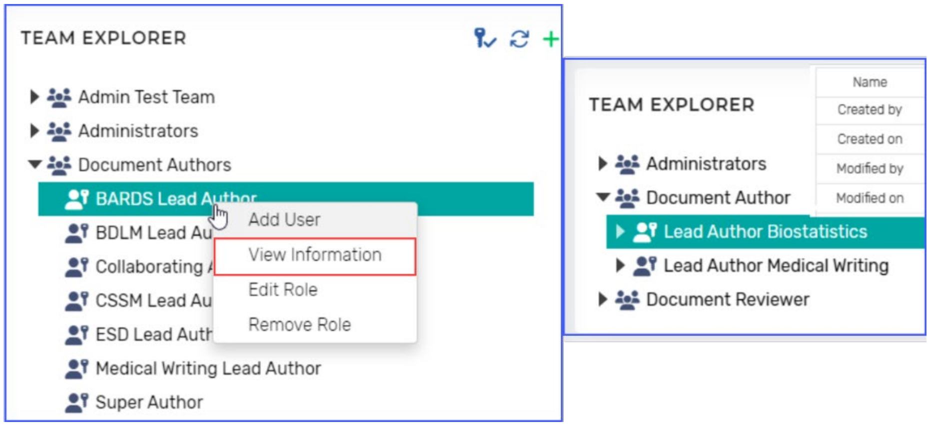
<u>Note</u> The **+ Rule Set** function can be used if multiple rules need to be grouped together, and then executed either with (**AND**) or alternatively (**OR**) vs another separate rule or ruleset.

i. To add permissions for more objects, click the **Add Another** icon.

j. Repeat Steps e. and f., as needed, and click **Save**.

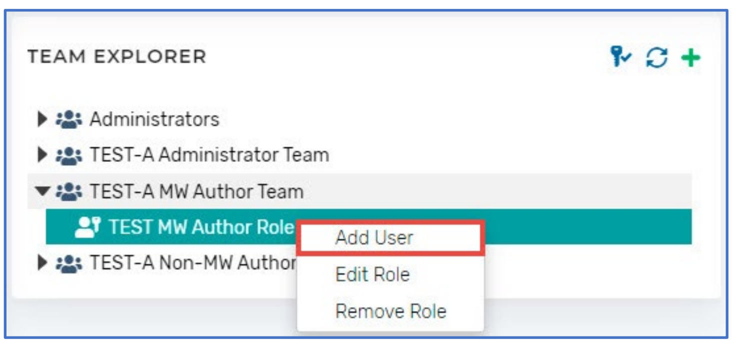
<u>Notes</u>: • For the **Create Variant** option to be enabled, a user role must have **Create** access for the relevant object class.

- Once a role has been created, information about that role is available by using the right click menu and selecting **View Information**, or by hovering over the applicable role.



7.8 ADDING USERS TO A ROLE

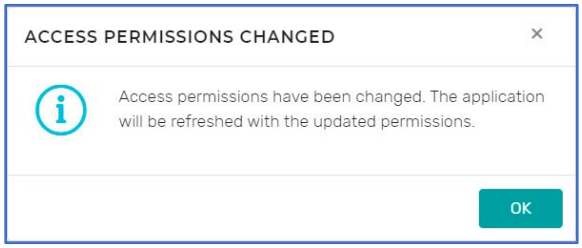
1. Right-click on the applicable role and click **Add User**.



2. Enter the user's name(s), select the appropriate name from the displayed matches, and click **Save**. Multiple users can be added at one time.

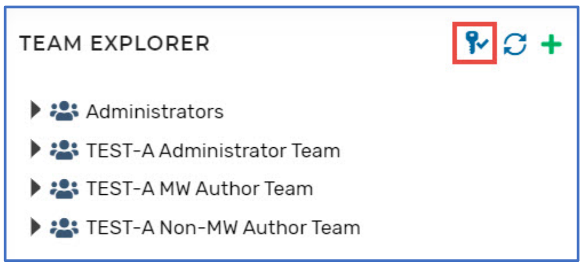
Note: A confirmation pop-up box will display on the added user's screen if the user is active in the system at the time of permission change.

3. When a user is added or removed from a role, they will receive the following message on their screen.

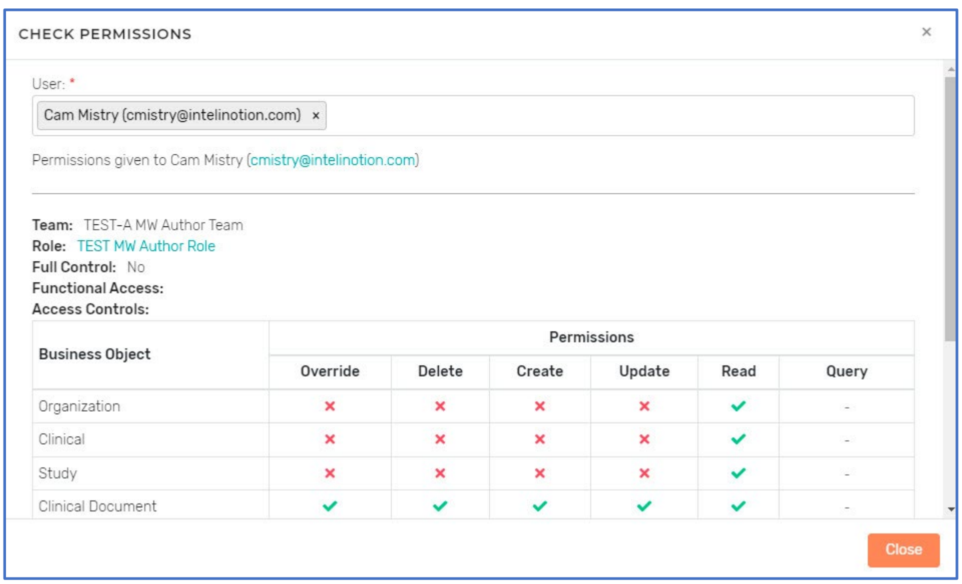


7.9 CHECKING A USER'S PERMISSIONS

1. Click the **icon** to check a user's permissions.



2. Enter the user's name (usernames that match the text entered will be displayed) and click on the matching name to display the user's permissions (teams/roles they are assigned to) below the box.



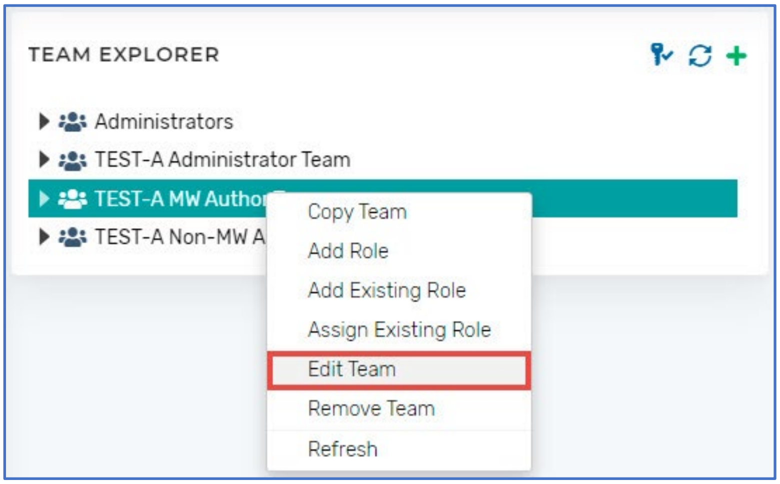
Note: Clicking a **Role** name will launch a new browser window highlighting that role within the Teams area of the *Web Console*.

7.10 UPDATING OR DELETING A TEAM OR ROLE

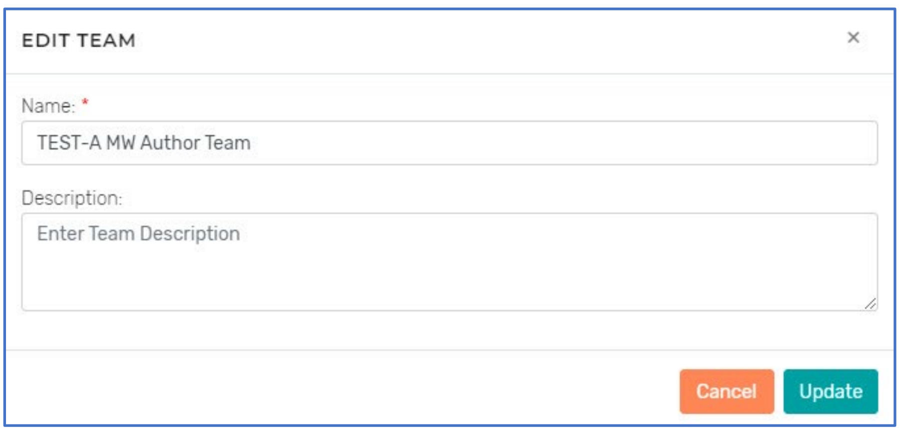
To update or delete a team or role, follow the steps listed in the sections below.

7.10.1 Updating a Team

1. Right-click on the team name and click **Edit Team**.

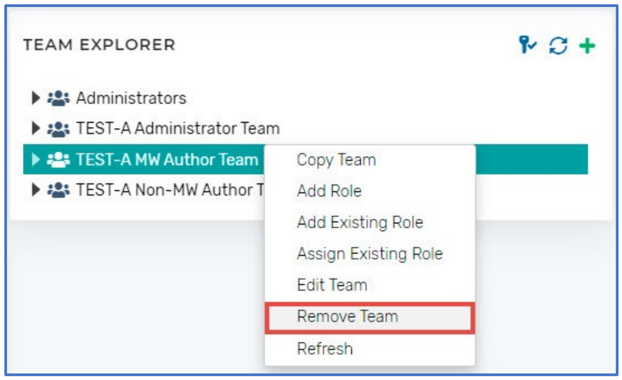


2. Make the changes and click **Update**.

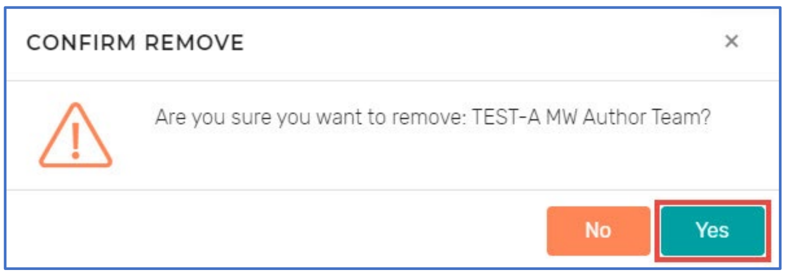


7.10.2 Deleting a Team

1. Right-click on the team name and click **Remove Team**.

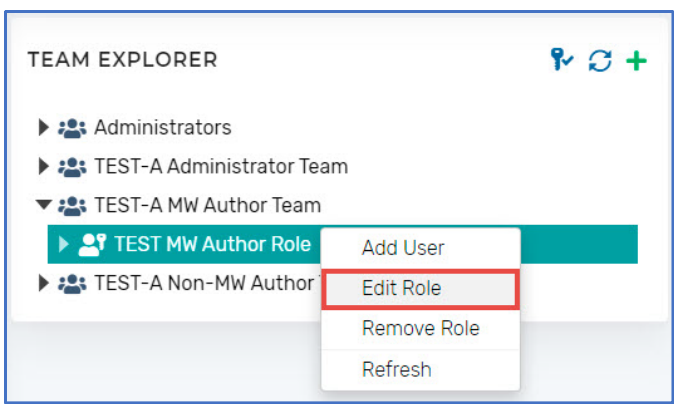


2. A confirmation pop-up box will display. Click **Yes** to delete the team.

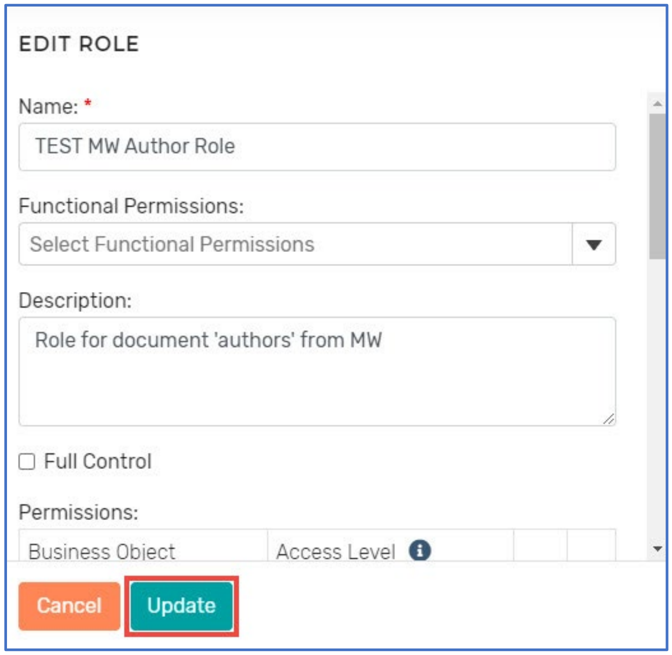


7.10.3 Updating a Role

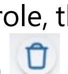
1. Right-click on the role name and click **Edit Role**.



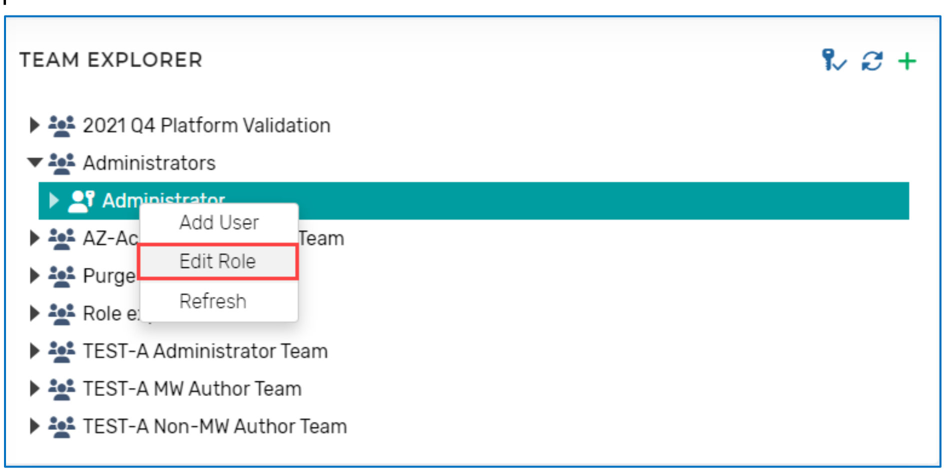
2. Make the changes and click **Update**.



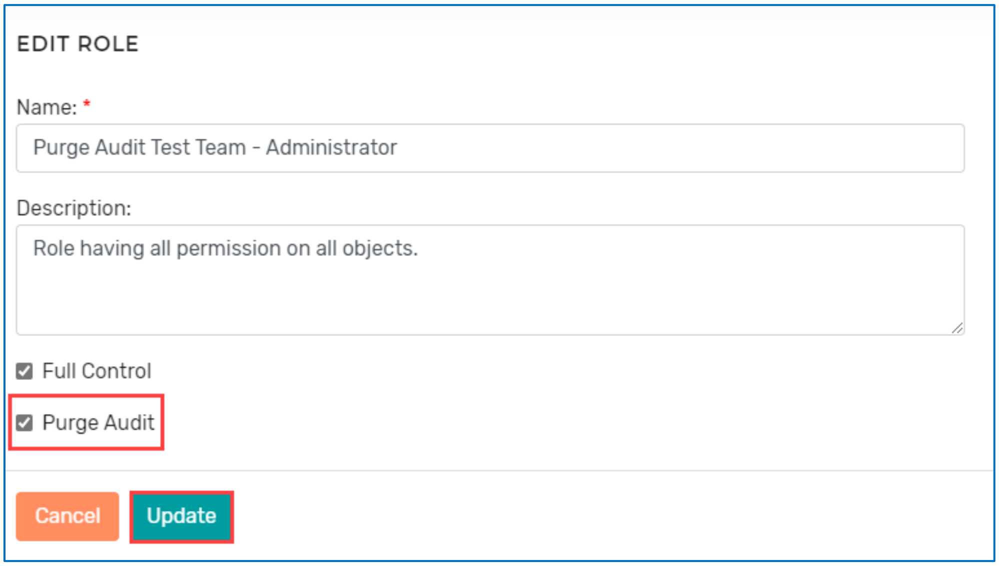
7.10.3.1 Updating Purge Audit Permissions

When updating an administrative role, there is an option to give the user **Purge Audit** permission. This activates the purge audit icon  on the **Audit Logs** screen (see Section 8.6) and gives the user permission to permanently purge all audit logs from the system. Follow the steps listed below to configure this setting.

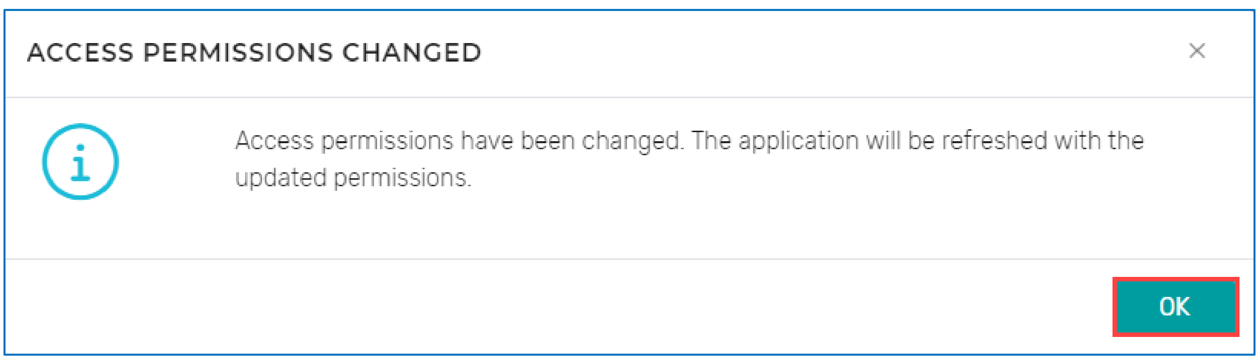
1. In the *Web Console*, navigate to the **Teams** page. Right click on the administrative role to be updated and select **Edit Role**.



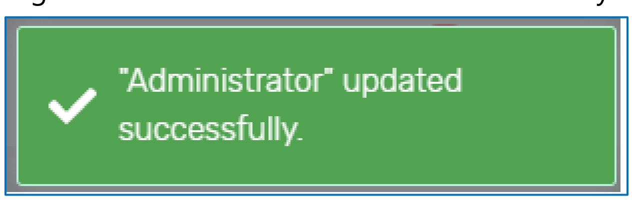
2. The **Edit Role** form will display on the right. Check the checkbox next to **Purge Audit** and click **Update**.



3. A pop-up will appear informing the user that the access permissions have been changed, and the application will refresh with the updated permissions. Click **OK**.

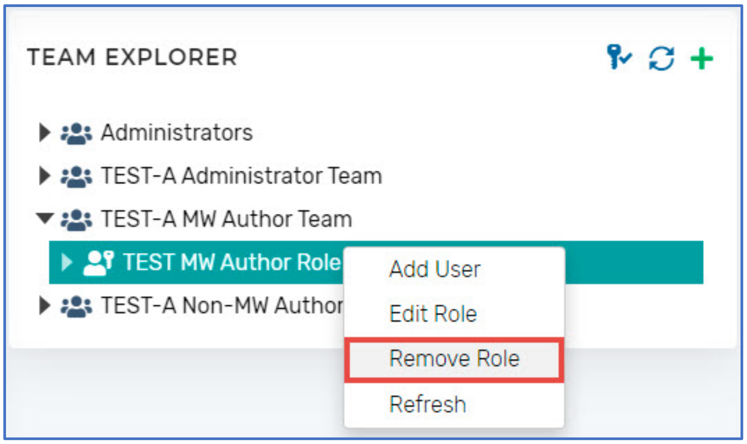


4. A pop-up informing the user that the role has been successfully updated will display.

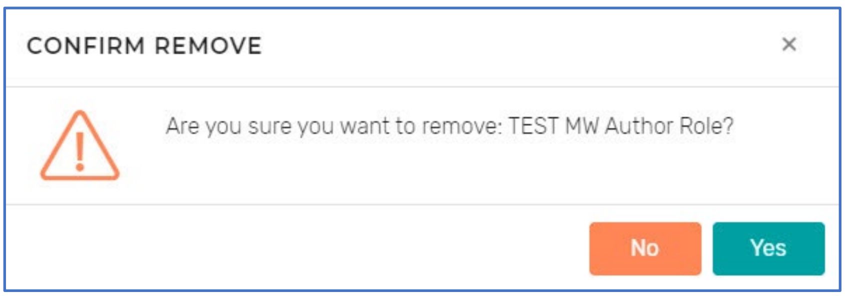


7.10.4 Deleting a Role

1. Right-click on the role name and click **Remove Role**.



2. A confirmation pop-up box will display. Click **Yes** to delete the role.



8. AUDIT TRAIL MANAGEMENT

Audit trail management enables configuring immutable logging of the system as well as user events. Events about various business objects added to the system can also be configured. The information captured in each of the audit trail logs is relevant to each event and can also be customized for capturing as needed. Access to the audit logs for different users of the system can be controlled with the help of functional permissions.

8.1 AUDIT TRAIL-RELATED FUNCTIONAL PERMISSIONS

The following functional permissions are required to configure auditing within the system and perform other related activities:

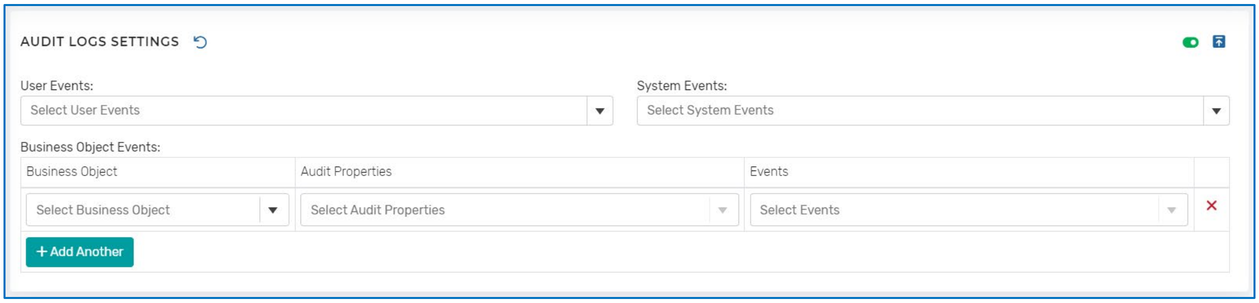
- **Manage Auditing -** Provides access to the option of **Audit Logs** under the **Settings** option in the left-hand navigation pane to configure audit logging
- **View Audit Logs -** Provides access to the option of **Audit Logs** under the **Logs** option in the left-hand navigation pane to view, search and purge (only if allowed) all the audit logs
- **Service Logs -** Provides access to the option of **Service Logs** under the **Logs** option in the left-hand navigation pane to view the backend related audit logs
- **Purge Audit -** Provides an option to purge all the audit logs

8.2 CONFIGURING AUDIT LOG SETTINGS

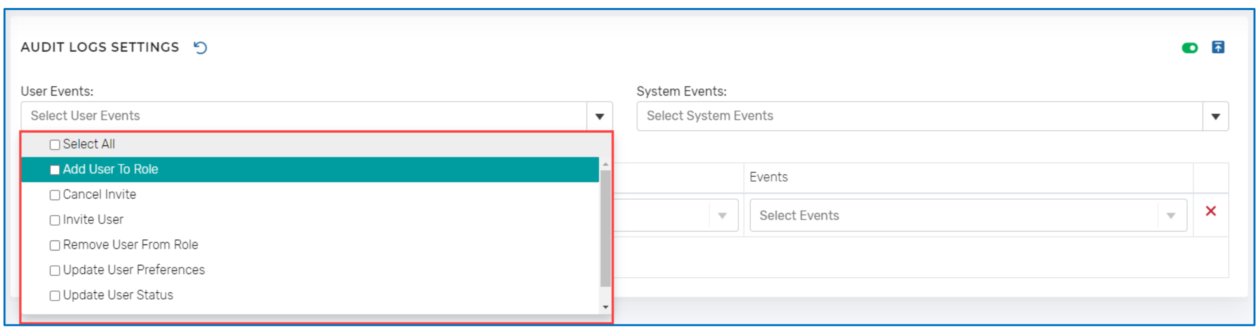
To configure the audit log settings, ensure that the **Manage Auditing** functional permission is selected for the user's role.

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Auditing**.
2. To enable auditing, click the **toggle icon** .

3. Once enabled, the **Audit Logs Settings** form will display.



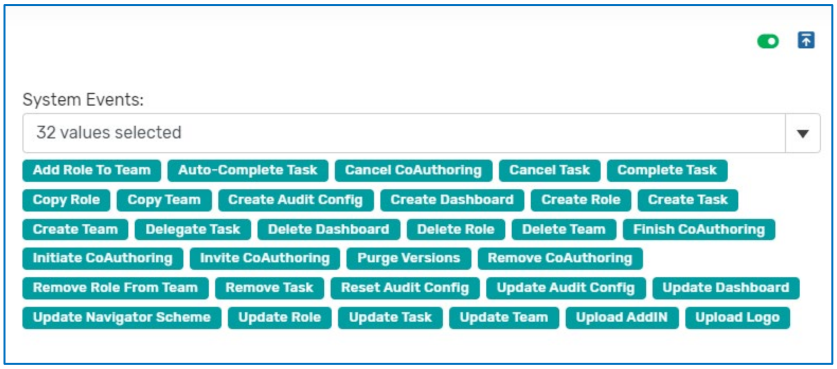
4. Select 1, more, or all **User Events** from the available list for auditing.
   - **Add User To Role** - Action of assigning a specific role to a user
   - **Cancel Invite** - Action of canceling *InteliNotion* invitation sent to a user
   - **Invite User** - Action of inviting a user to *InteliNotion*
   - **Remove User from Role** - Action of removing a user from a role
   - **Update User Preferences** - Action of a user updating/modifying any of his/her user-level settings (eg, date format, page size, download location, etc.)
   - **User Login** - Action of a user logging into *InteliNotion*



5. Select 1, more, or all **System Events** from the available list for auditing.
   - **Add Role To Team** - Action of creating a new role under a team
   - **Auto-Complete Task** - Action of auto-completing a task
   - **Cancel CoAuthoring** - Action of canceling co-authoring on a document
   - **Cancel Task** - Action of canceling a task
   - **Complete Task** - Action of completing a task
   - **Copy Role** - Action of duplicating a role existing under a team, but with a different name, under the same team or a different team
   - **Copy Team** - Action of duplicating an existing team, along with the roles configured under it, but different names for the new team and the roles

- **Create Audit Config** - Action of configuring audit logging
- **Create Dashboard** - Action of creating a dashboard
- **Create Relationship** - Action of creating a relationship for a metadata subcategory or value selection
- **Create Role** - Action of creating a new role under a team
- **Create Task** - Action of creating a task
- **Create Team** - Action of creating a new team in *InteliNotion*
- **Delegate Task** - Action of delegating a task
- **Delete Dashboard** - Action of deleting a dashboard configured in *InteliNotion*
- **Delete Relationship** - Action of removing a relationship for a metadata subcategory or value selection
- **Delete Role** - Action of deleting a role from under a team
- **Delete Team** - Action of deleting a team from *InteliNotion*
- **Finish Co-authoring** - Action of completing a co-authoring session of a document
- **Initiate Co-authoring** - Action of commencing a co-authoring session on a document
- **Invite Co-authoring** - Action of inviting additional users to co-author a document
- **Purge Versions** - Action of purging versions for the **Template** business object only
- **Remove Co-authoring** - Action of removing a user from a co-authoring session initiated on a document
- **Remove Role from Team** - Action of removing a **Role** from a team when the role is used in multiple teams; the role is not completely deleted
- **Remove Task** - Action of removing a task
- **Reset Audit Config** - Action of resetting the audit log settings
- **Save to Repository** – Action of saving to an external document repository
- **Update Audit Config** - Action of making an update to audit log settings
- **Update Dashboard** - Action of making an update to an existing dashboard configuration
- **Update Navigator Scheme** - Action of making an update to the **Navigator Scheme**
- **Update Object** - Action of updating the business object's configuration
- **Update Role** - Action of making an update to a role under a team
- **Update Task** - Action of updating a task
- **Update Team** - Action of making an update to a team in *InteliNotion*

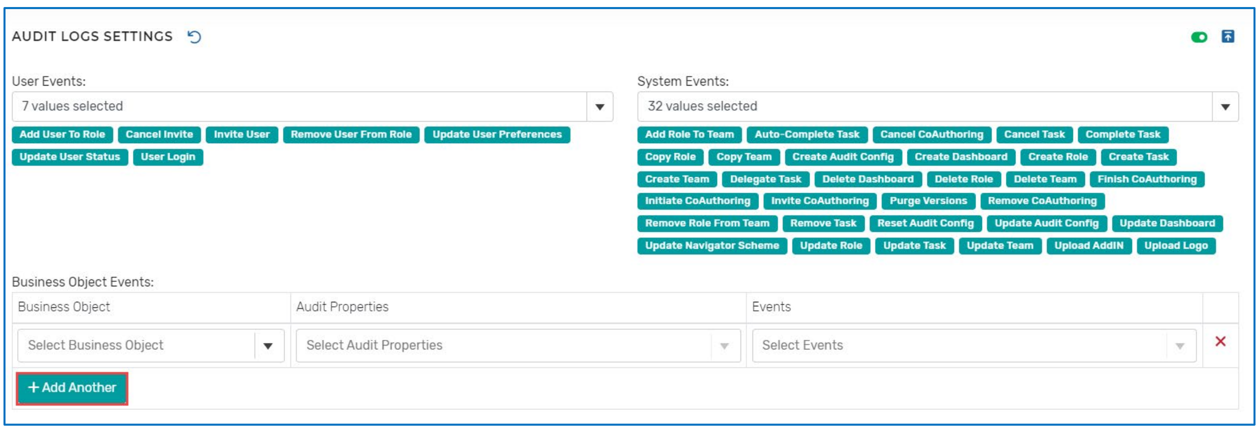
- **Upload AddIN** – Action of uploading an add-in file to the *Web Console* (eg, when a new version is available).
- **Upload Logo** – Action of uploading the logo used for the *Web Console* header



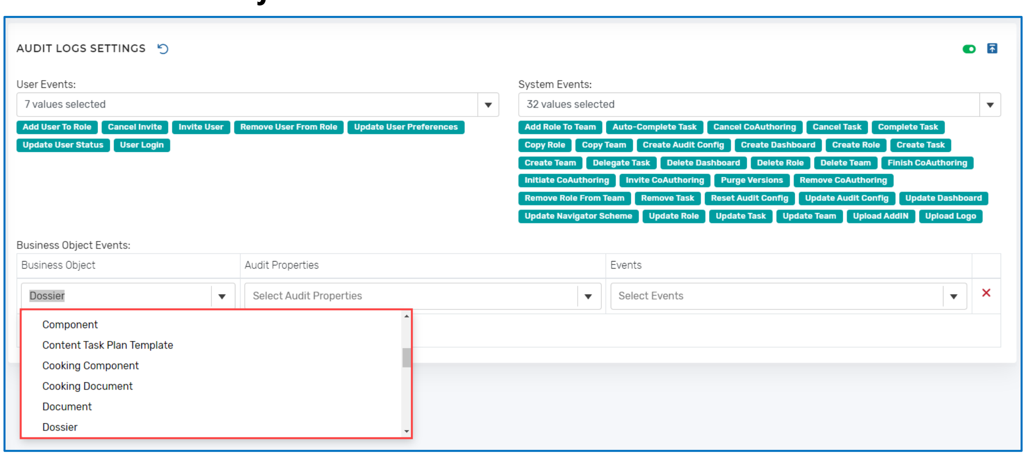
6. To configure the **Business Object Events** for auditing, follow the steps listed below.

   a. Click the 

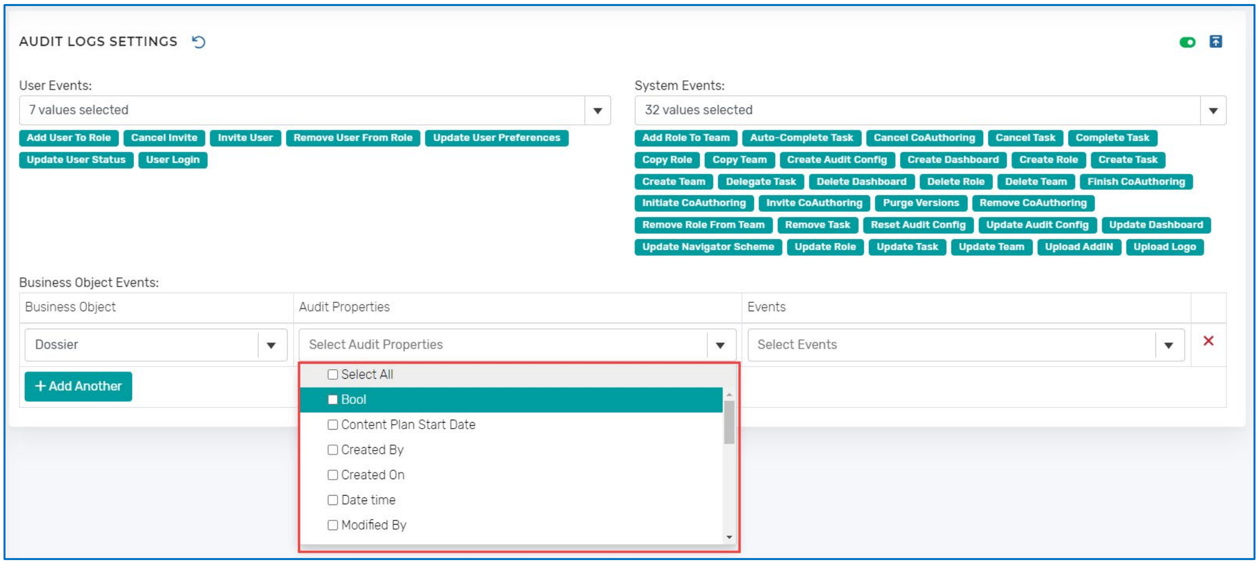
 button.



   b. Select a **Business Object** to be audited.

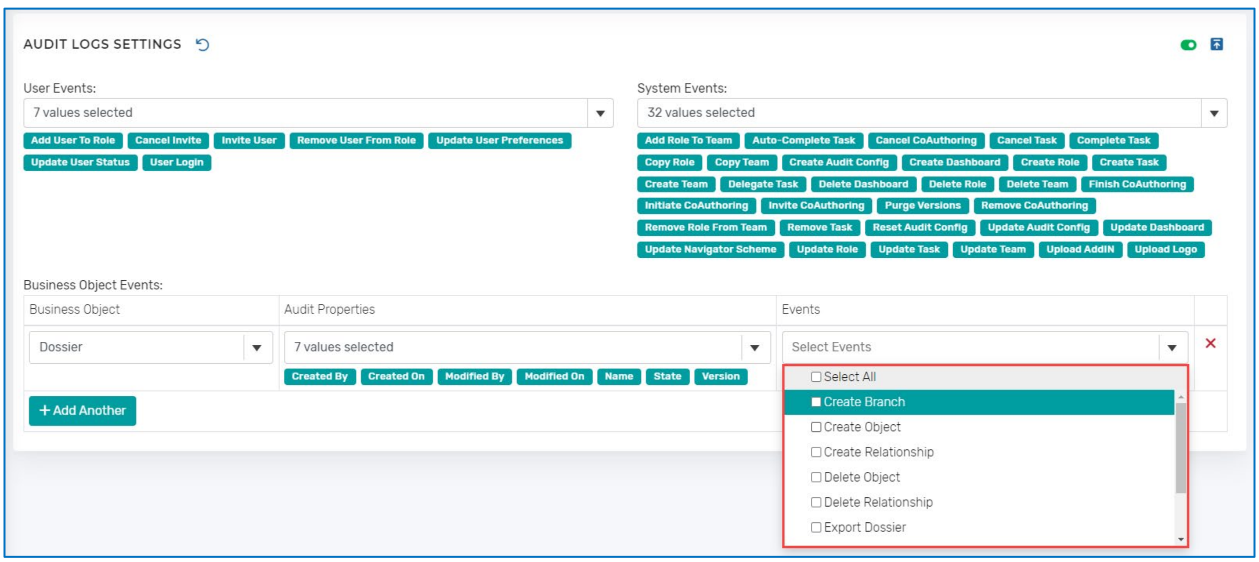


c. Select the relevant business object's properties to be included in the audit log's details.



> **<u>Note:</u>** It is recommended to limit the max number of system and custom audited properties for a single business object to 50.

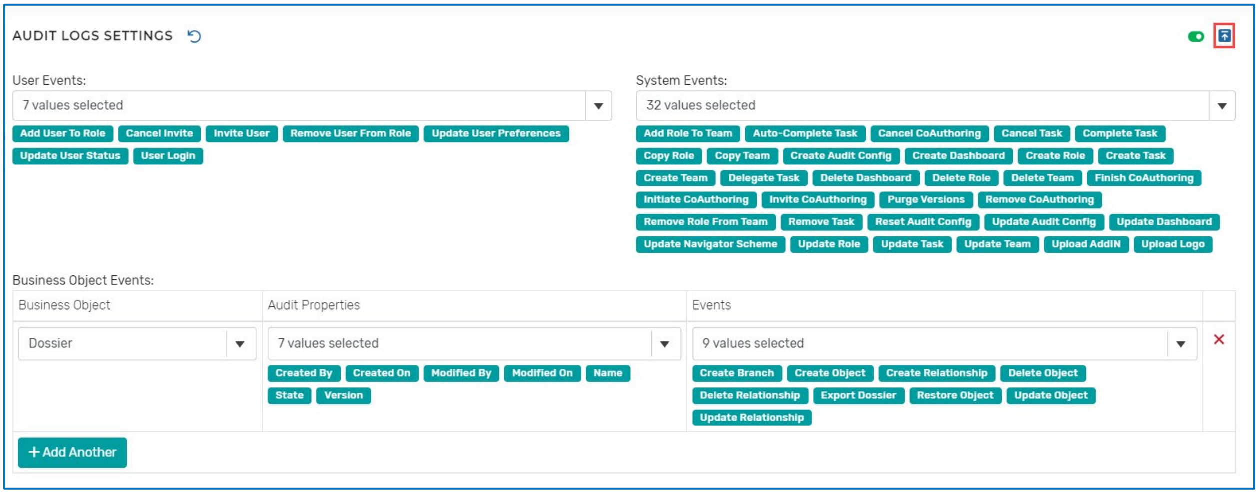
d. Select the business object's associated events (1, more, or all) to appear in the audit log. For example, events such as **Check Out**, **Save to Repository**, **Export from System**, and **Delete Object** can be selected for the **Document** object class or subtype.



> **<u>Note:</u>** The **Check Out** event is for both single authoring and co-authoring.

7. Repeat Step 6 until all business objects to be audited are selected.

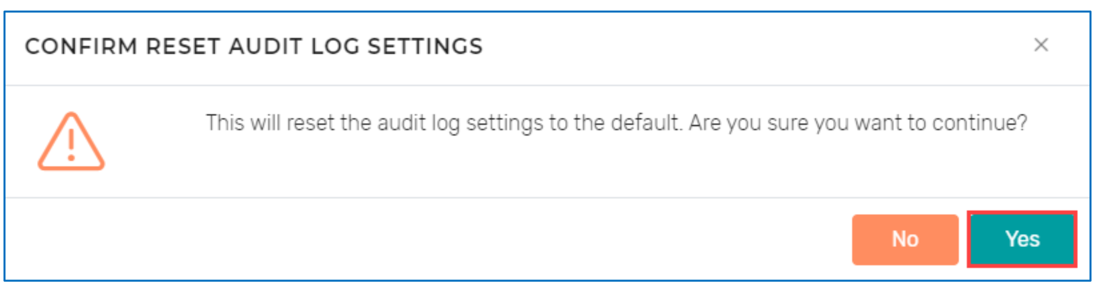
8. After completing all the above steps, click the **icon** at the top-right corner to save all the configurations.



8.3 UPDATING AUDIT TRAIL CONFIGURATIONS

To update the audit trail configurations, make any required changes to the configurations in the **Audit Log Settings** form, and save using the **icon** at the top-right corner of the screen.

To reset the audit trail configurations, click the **icon** at the top left corner of the screen. A confirmation pop-up will display informing the user that this action will reset the audit trail configurations to default. Click **Yes**.

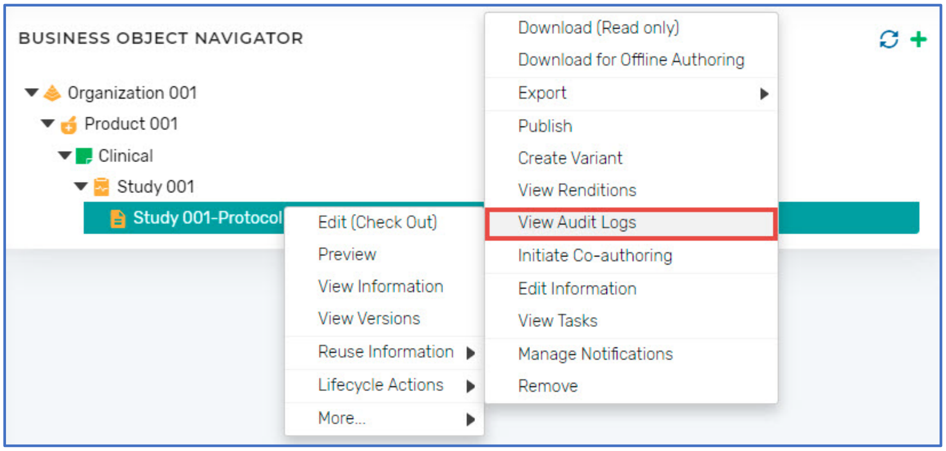


8.4 VIEWING AUDIT LOGS

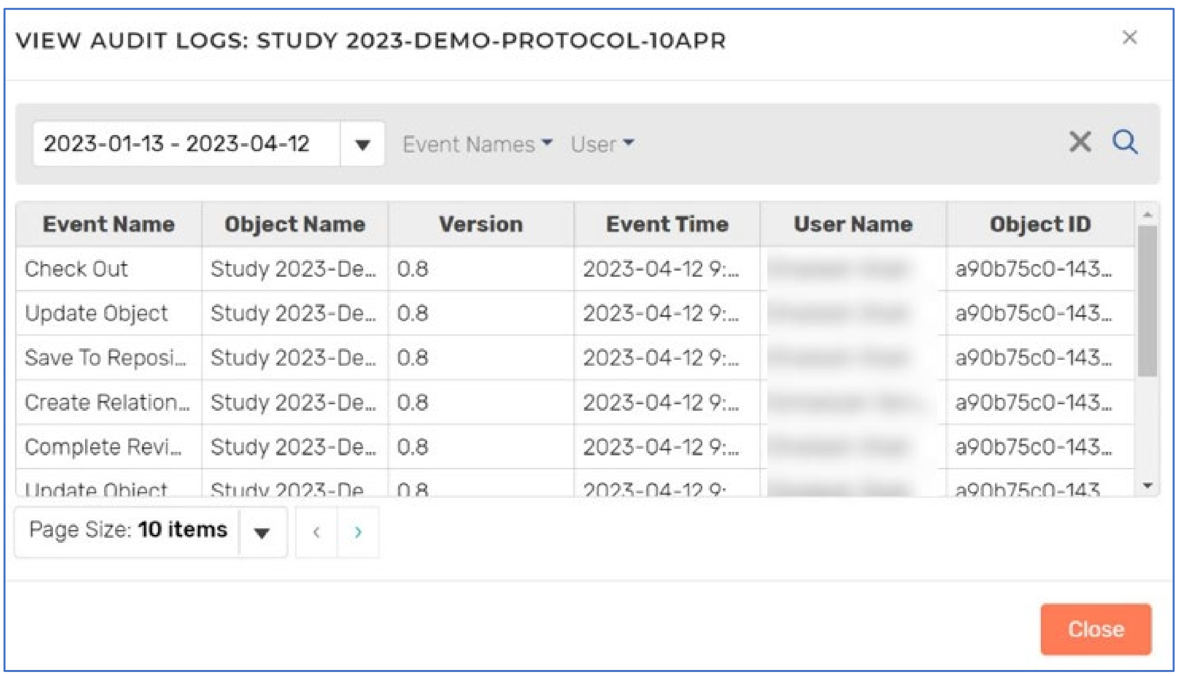
There are multiple ways audit logs can be viewed. Any user can view audit logs for an individual business object such as a document, component, or task. However, only authorized users (eg, admins) can view audit logs for the entire system.

8.4.1 Audit logs for an Individual Business Object

1. Right-click on the business object's name in the **Navigator** (or another view, such as within **Search** or **Libraries**), and under **More**, click **View Audit Logs**.

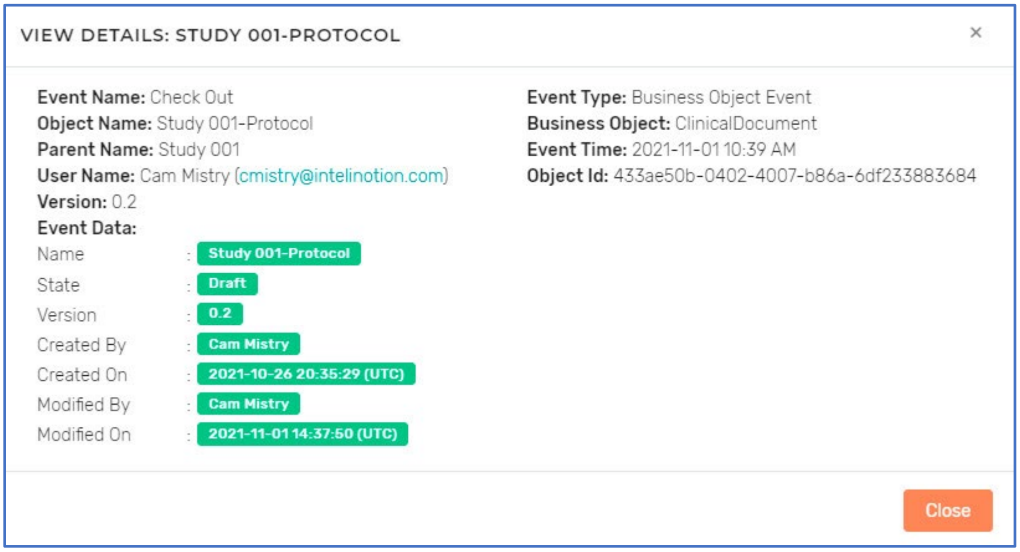


2. All the audit logs from the previous 90 days for that business object will appear (follow the steps listed in Section 8.4.2 to filter the audit log results).



> **Note:** For objects that cannot be versioned, the version number in version column of audit logs will be 0.1.

3. Double click on each log (row) to view more details of that audit event.

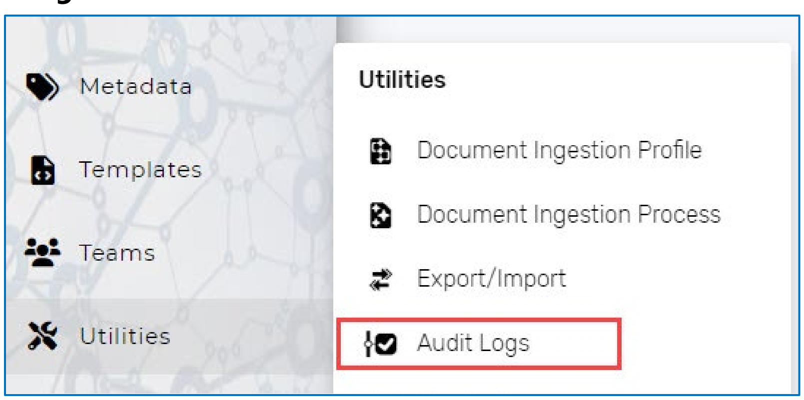


Notes:

- If a remove task event has occurred, the details tab on the deleted object (eg document) will display 'NA' for the **Name** and **Version**.
- Some audit events, eg Complete Review in *PleaseReview*, may have additional information, such as participant names and emails.

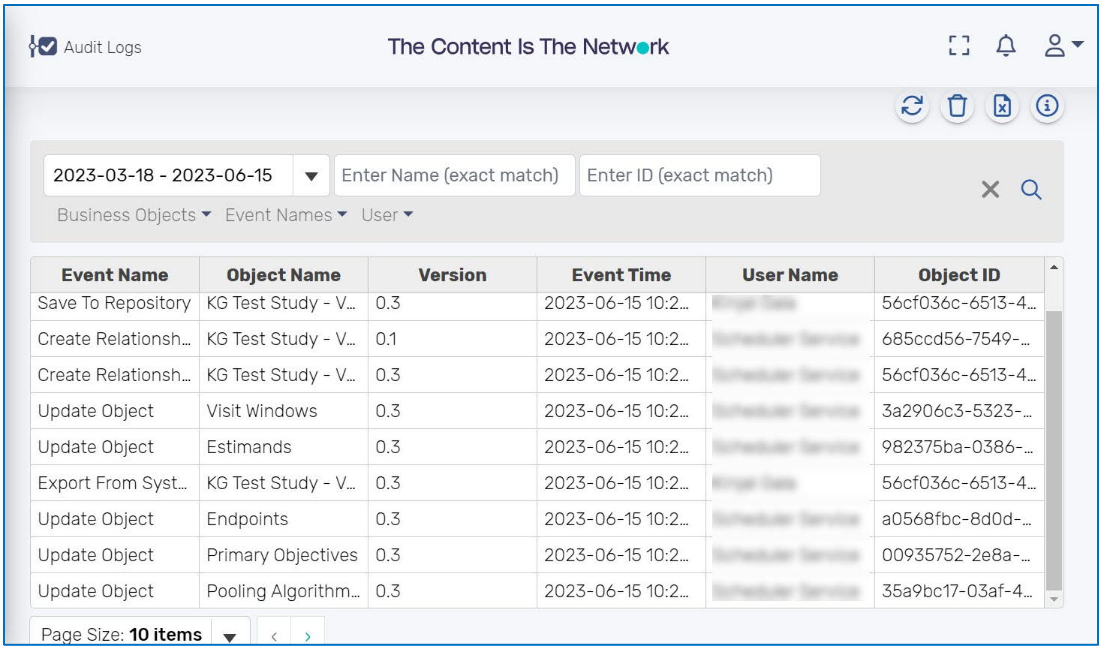
8.4.2 Audit Logs Captured Throughout The System

1. In the *Web Console*, hover over the **Utilities** option in the left-hand navigation pane and click **Audit Logs**.

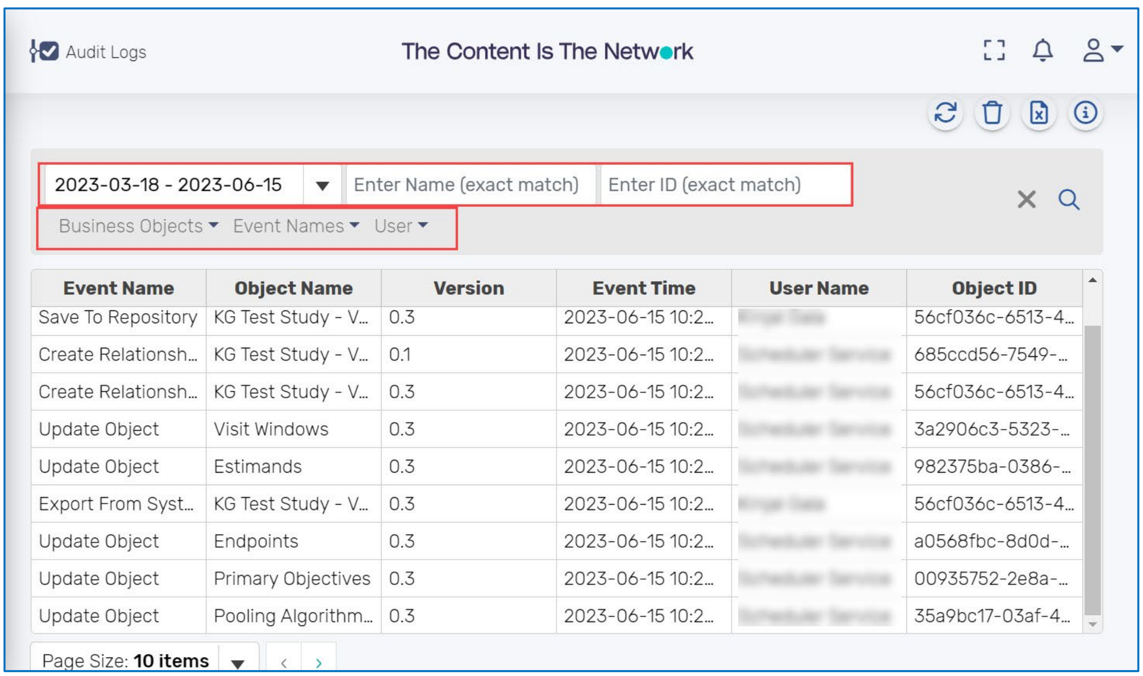


Note: The functional permission **View Audit logs** is required to access this area.

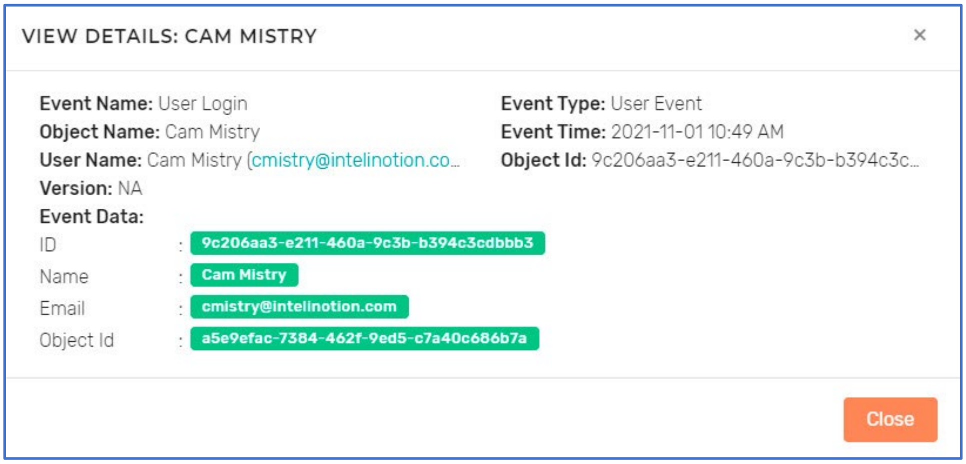
2. All audit logs for the system will display.



3. Click on the available filters and/or refine the search by following the steps listed below to search for and display specific audit logs.

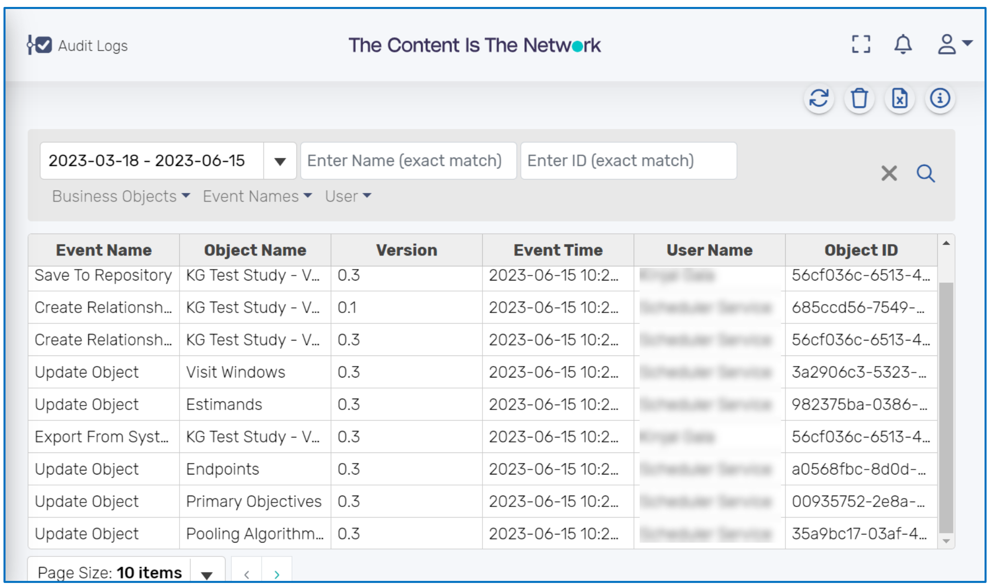


4. Double-click on each log to view more details.

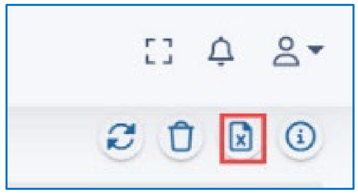


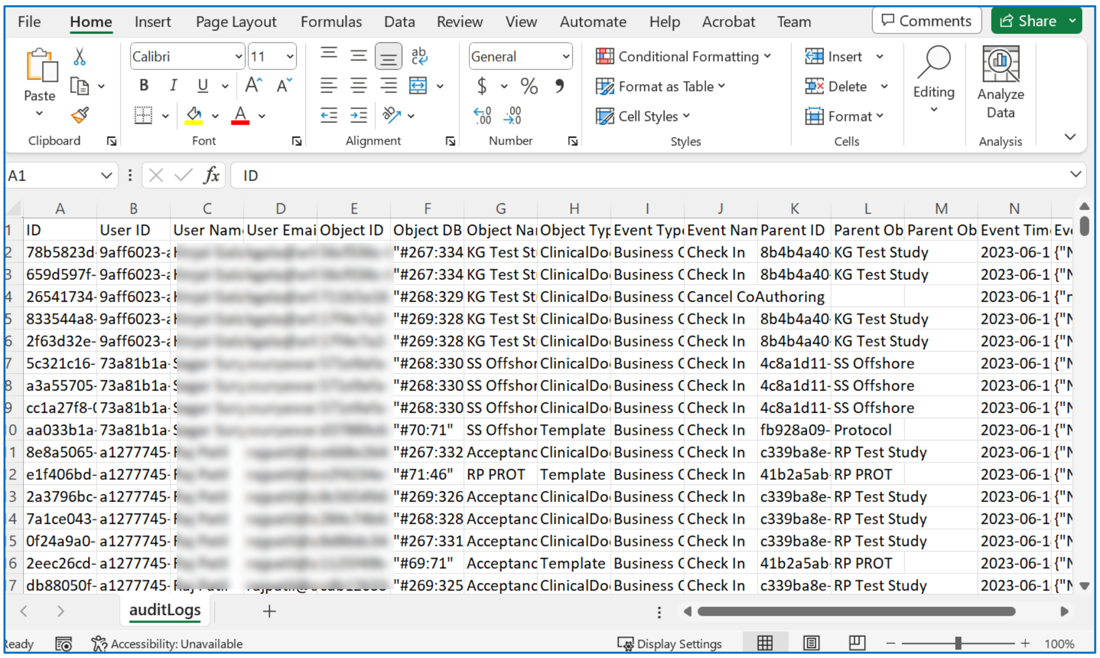
8.5 EXPORTING AUDIT LOGS

1. In the *Web Console*, hover over the **Utilities** option in the left-hand navigation pane and click **Audit Logs**.
2. All audit logs for the system will display.



3. Click the **icon** at the top-right corner to export out the audit results into a CSV file, as shown in this example.



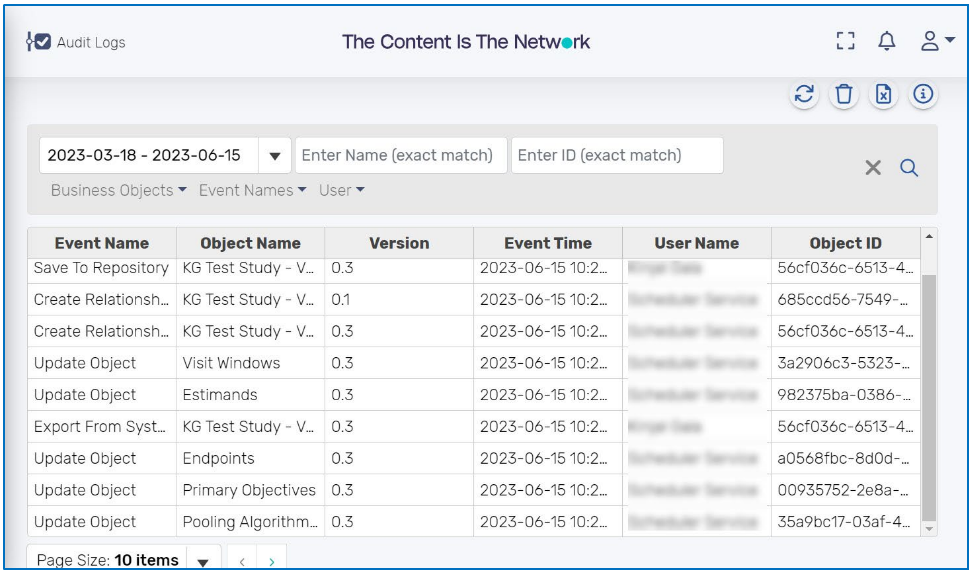


Note: If filters are applied while viewing the audit logs and then the audit logs are exported, only the log results from the filtered results are exported from the system.

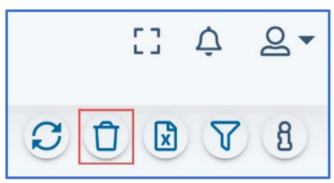
8.6 PURGING AUDIT LOGS

To purge audit logs, the user must have **Purge Audit** permissions. Once **Purge Audit** permissions have been configured (see Section 7.10.3.1) follow the steps listed below to purge audits.

1. In the *Web Console*, hover over the **Utilities** option in the left-hand navigation pane and click **Audit Logs**.
2. All audit logs for the system will display.

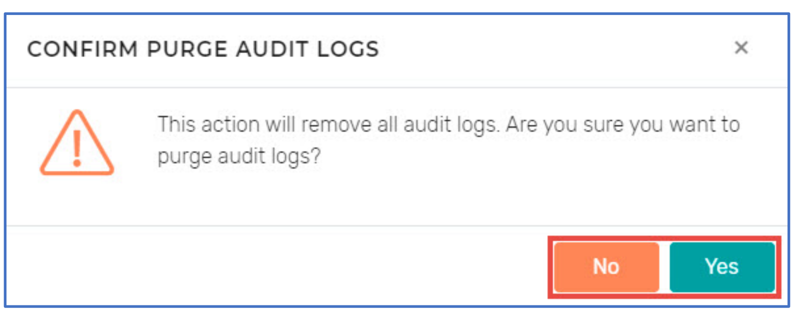


3. To purge audits, click the **Delete icon**  at the top-right corner.

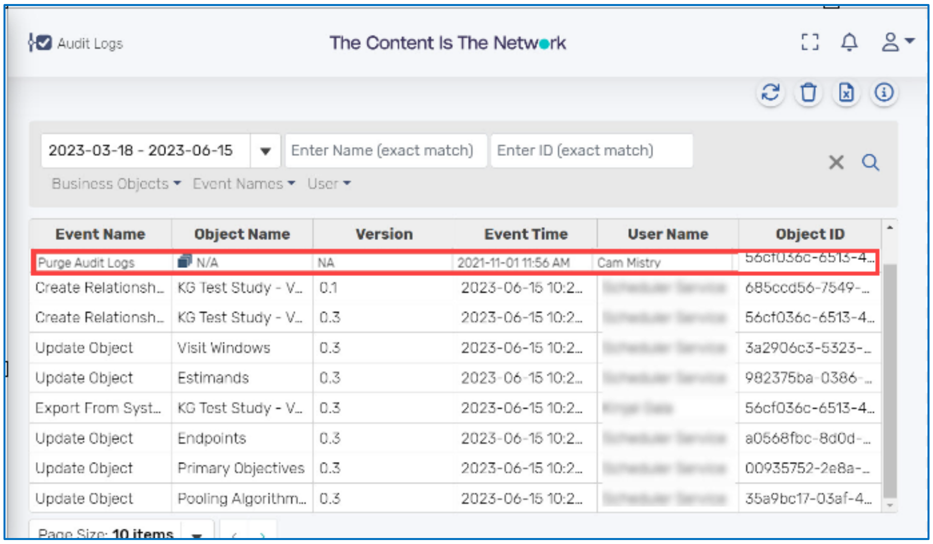


Note: The functional permission **Purge Audit** is required for the icon to be enabled.

4. A confirmation pop-up box will display on the screen. Click **Yes** to purge audit logs or click **No** to cancel.



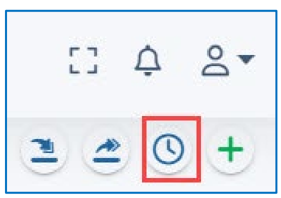
5. After the audit logs are purged, the audit log will show a record of the purge occurring.



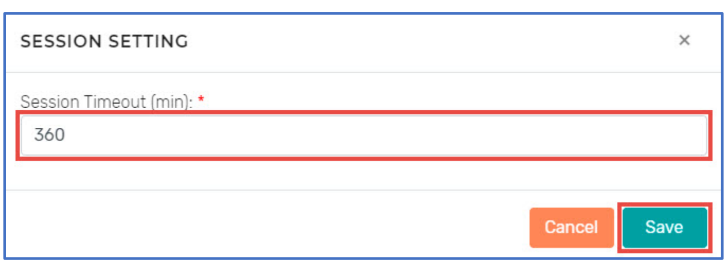
8.7 UPDATING USER SESSION TIMEOUT SETTING

The default session timeout for all users is 15 minutes, but this can be changed as follows:

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Users**.
2. Click the  **icon** in the top-right corner of the **Users** page to change the session setting for all users.



3. A **Session Setting** form will appear. Enter the required setting timeout (in minutes) and click **Save**.



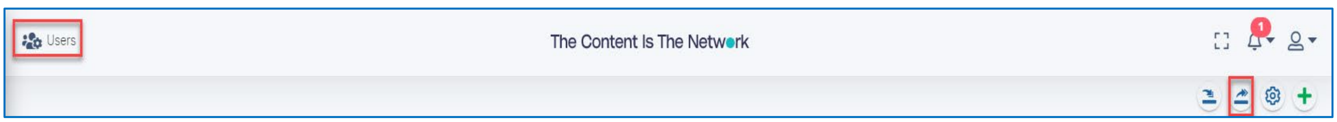
8.8 EXPORTING USER LIST

Authorized users shall be able to export a CSV file that includes, at a minimum:

- User name
- User ID (InteliNotion ID)
- User Invitation Status
- Directory Object ID (to be populated for AAD only)
- User role(s)
- License Type
- Email Address

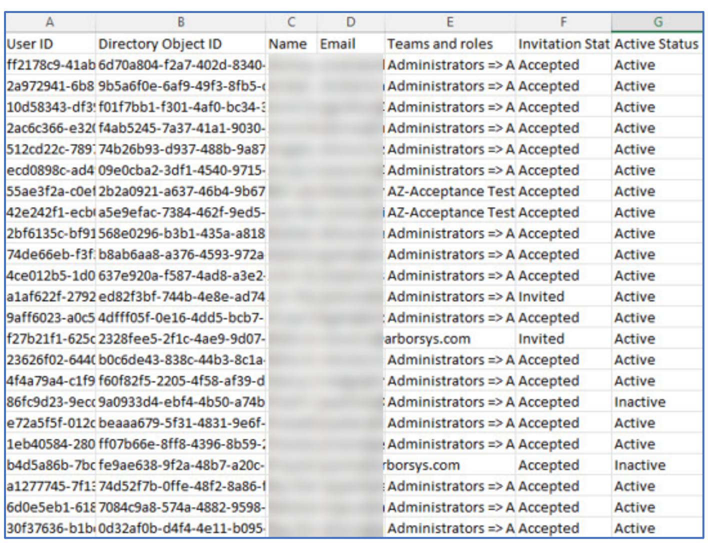
This report will be available both for OAuth and SAML-based identity providers configured in *InteliNotion*.

1. In the *Web Console* click **Settings** and click **Users**.
2. A **Users** list pane will open. Click the export file icon .



3. Click in download files, or on the **Open file** option to open the file.

4. The file will open as a CSV file.



A	B	C	D	E	F	G
User ID	Directory Object ID	Name	Email	Teams and roles	Invitation Stat	Active Status
ff2178c9-41ab	6d70a804-f2a7-402d-8340-	[illegible]	[illegible]	Administrators => A	Accepted	Active
2a972941-6b8	9b5a6f0e-6af9-49f3-8fb5-	[illegible]	[illegible]	Administrators => A	Accepted	Active
10d58343-df3	f01f7bb1-f301-4af0-bc34-	[illegible]	[illegible]	Administrators => A	Accepted	Active
2ac6c366-e32	f4ab5245-7a37-41a1-9030-	[illegible]	[illegible]	Administrators => A	Accepted	Active
512cd22c-789	74b26b93-d937-488b-9a87	[illegible]	[illegible]	Administrators => A	Accepted	Active
ecd0898c-ad4	09e0cba2-3df1-4540-9715-	[illegible]	[illegible]	Administrators => A	Accepted	Active
55ae3f2a-c0e	2b2a0921-a637-46b4-9b67	[illegible]	[illegible]	AZ-Acceptance Test	Accepted	Active
42e242f1-ecb	a5e9efac-7384-462f-9ed5-	[illegible]	[illegible]	AZ-Acceptance Test	Accepted	Active
2bf6135c-bf91	568e0296-b3b1-435a-a818	[illegible]	[illegible]	Administrators => A	Accepted	Active
74de66eb-f3f	b8ab6aa8-a376-4593-972a	[illegible]	[illegible]	Administrators => A	Accepted	Active
4ce012b5-1d0	637e920a-f587-4ad8-a3e2-	[illegible]	[illegible]	Administrators => A	Accepted	Active
a1af622f-2792	ed82f3bf-744b-4e8e-ad74	[illegible]	[illegible]	Administrators => A	Invited	Active
9aff6023-a0c5	4dfff05f-0e16-4dd5-bcb7-	[illegible]	[illegible]	Administrators => A	Accepted	Active
f27b21f1-625c	2328fee5-2f1c-4ae9-9d07-	[illegible]	[illegible]	arborsys.com	Invited	Active
23626f02-644	b0c6de43-838c-44b3-8c1a-	[illegible]	[illegible]	Administrators => A	Accepted	Active
4f4a79a4-c1f9	f60f82f5-2205-4f58-af39-d	[illegible]	[illegible]	Administrators => A	Accepted	Active
86fc9d23-9ec	9a0933d4-ebf4-4b50-a74b	[illegible]	[illegible]	Administrators => A	Accepted	Inactive
e72a5f5f-012c	beaaa679-5f31-4831-9e6f-	[illegible]	[illegible]	Administrators => A	Accepted	Active
1eb40584-280	ff07b66e-8ff8-4396-8b59-	[illegible]	[illegible]	Administrators => A	Accepted	Active
b4d5a86b-7bc	fe9ae638-9f2a-48b7-a20c-	[illegible]	[illegible]	rborsys.com	Accepted	Inactive
a1277745-7f1	74d52f7b-0ffe-48f2-8a86-	[illegible]	[illegible]	Administrators => A	Accepted	Active
6d0e5eb1-61	7084c9a8-574a-4882-9598-	[illegible]	[illegible]	Administrators => A	Accepted	Active
30f37636-b1b	0d32af0b-d4f4-4e11-b095-	[illegible]	[illegible]	Administrators => A	Accepted	Active

9. CO-AUTHORING MANAGEMENT

InteliNotion supports two options for the co-authoring service:

- SharePoint
- OneDrive for Business

The desired option is set up during deployment. The "CO-AUTHORING CONFIGURATION" form allows the user in an admin role to define the configuration. The form will display the required fields corresponding to the configured option. The details of each field are listed below.

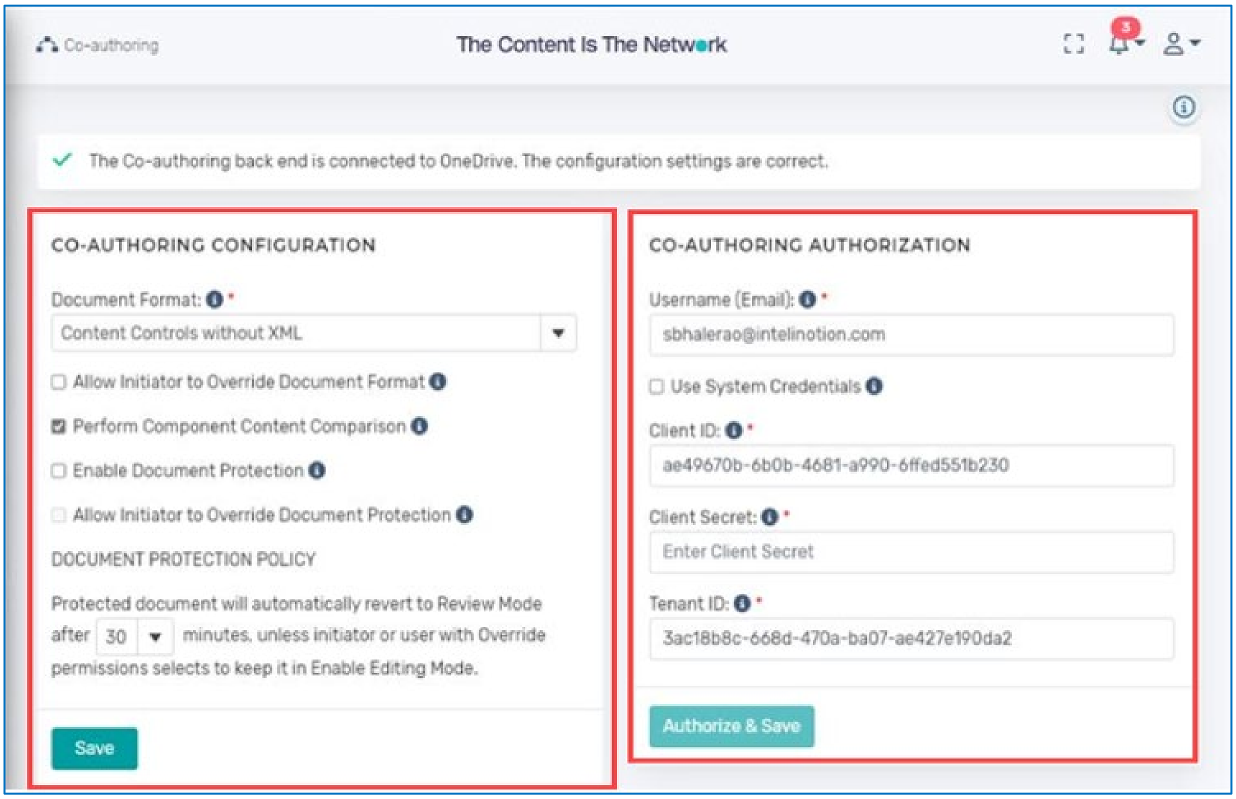
- **Username** - this is the service account username. The documents will be shared with authors by this account.
- **Document Format** - this option determines which document format to be used while initiating the document for co-authoring. "Content Controls with XML" requires *MS Word* version 2203 or higher. Available functionality may vary depending on which setting is selected. Refer to the **InteliNotion User Guide** for details.

  Note: Documents that are in active co-authoring will not be affected if this setting is changed.

- **Allow Initiator to Override Document Format** - in rare cases, if it is desired for an author to be able to override the Document Format setting on a per document basis, check this box. Enable this setting with caution because it will result in both types of documents (ie, with and without XML) being co-authored with slightly different functionality.
- **Perform Component Content Comparison** - if enabled, additional content comparison for each component will be performed when finishing co-authoring or interim saving the document during co-authoring. This comparison will make component change notifications more accurate.
- **Use System Credentials** - *InteliNotion* requires *Azure AD* application credentials with the appropriate permissions. If you select this option, the *Azure AD* application credentials used while deployment of the application will be used.
- **Client ID** - the Client ID (client_id) is a public identifier for apps. This is the *Azure AD* application ID.
- **Client Secret** - the Client Secret (client_secret) is a secret known only to the application and the authorization server. The Client Secret can be defined/updated during the *Azure AD* application registration process.
- **Tenant ID** - the *Microsoft Office 365* Tenant ID is a globally unique identifier that is different than the organization name or domain.
- **Site** - this configuration field will be only available if the back-end service is configured to use *SharePoint*.

To configure these settings, in the *Web Console* left hand navigation pane, hover over **Settings** and click **Co-Authoring**. The co-authoring configuration and authorization page will display.

- The left side panel covers functionalities of the co-authoring configuration, and the **Save** button on the left side saves the desired configuration once completed, while the right-side panel covers the functionalities required for authorization.
- Once the Authorize & Save button is clicked, the confirmation dialog will open to verify if there are any documents in the co-authoring session or if there is any change in the username (for *OneDrive* and *SharePoint*) or site URL (for *SharePoint*).
- When authorization is successful, the page redirects to Co-authoring configuration and a configuration message will appear at the top indicating configuration settings are correct.



Notes:

- For instructions on the **Document Protection** configuration options, please refer to InteliNotion **User Guide Module 9**, **Section 5**, which covers this functionality in detail.
- The help text is available via **info icon**.

Once configured, the co-authoring functionality allows multiple users to work on the same document simultaneously (refer to the **InteliNotion User Guide Module 5** for more details).

Notes:

- Microsoft limits the maximum number of co-authors in the document to 99 beyond which users will receive an error message. The recommended limit for optimal user experience without performance degradation is 10 co-authors. See Software boundaries and limits for SharePoint Servers 2016 and 2019 - SharePoint Server | Microsoft Docs.
- These limits have not changed for *SharePoint* on-premise versions 2013-2019 and *SharePoint Subscription Edition*. *Microsoft* does not publish boundaries and limits for *SharePoint Online* separately.
- *InteliNotion* has a configurable 'max coauthors' setting with the default value of 30 which is displayed for the user when initiating co-authoring. This setting can be changed to any value up to 99.
- Co-authoring requires that the 'Store random numbers to improve Combine accuracy' check box is selected. Word adds random numbers to saved documents to track related versions. Refer to Troubleshoot co-authoring in Office for details.
- Co-authoring works only for modern Office formats (eg, .docx file). Co-authoring is not supported in some situations (eg, .doc file). For the complete list, refer to Troubleshoot co-authoring in Office.

Users in an admin role can perform the following actions on a document initiated for co-authoring, even if they did not initiate the co-authoring session:

- Interim save a document from the console or *InteliNotion Word app* (see **InteliNotion User Guide Module 5, Section 3.7** for details)

  Note: The user in an admin role must first add themself to the co-authoring session before performing the save.

- Finish co-authoring for the document (refer to **User Guide Module 5**, **Section 3.9** for details)
- Cancel co-authoring for a document (refer to **User Guide Module 5**, **Section 3.10** for details)

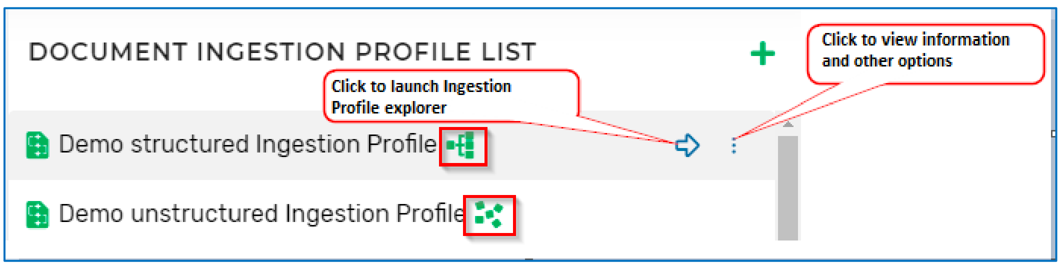
10. DOCUMENT INGESTION

Existing 'structured' documents that contain content controls and were authored outside of *InteliNotion* can be ingested into the system for future use. In addition, 'unstructured' documents that do not contain content controls can be ingested (must be in .docx format). When a document is ingested, the user can elect to recreate a document with components or just create components and add them to a selected managed library.

10.1 CREATING A DOCUMENT INGESTION PROFILE

For structured document ingestion, the template file should contain a structure (eg, section headings and related content controls) similar to that of the document that needs to be ingested.

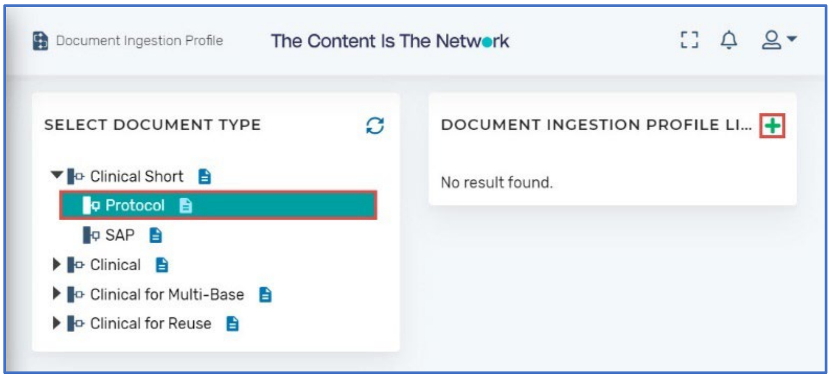
For unstructured document ingestion, the template file should contain a structure with section headings similar to that of the document that needs to be ingested. The new profile will appear in the **Document Ingestion Profile List**. The **vertical ellipsis** menu can be used to view or exit information, remove the profile, and download the template file.



<u>Note:</u> The icon for structured document profile is while the icon for unstructured document profile is

Follow the steps listed below to create a structured or unstructured document ingestion profile.

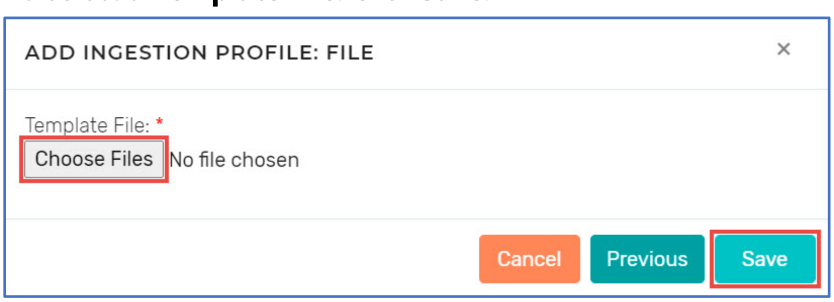
1. In the *Web Console*, hover over the **Utilities** option in the left-hand navigation pane and click **Document Ingestion Profile**.
2. In the **Select Document Type** pane, navigate to the applicable document type for the new **Ingestion Profile**, and click the **add icon** + in the **Document Ingestion Profile List** pane.



3. Enter the **Name** of the profile, select a **State**, select one of the following two options, and click **Next**.
   a. If ingesting a structured document, click the **Structured Document** checkbox.

b. If ingesting an unstructured document leave the checkbox unchecked.

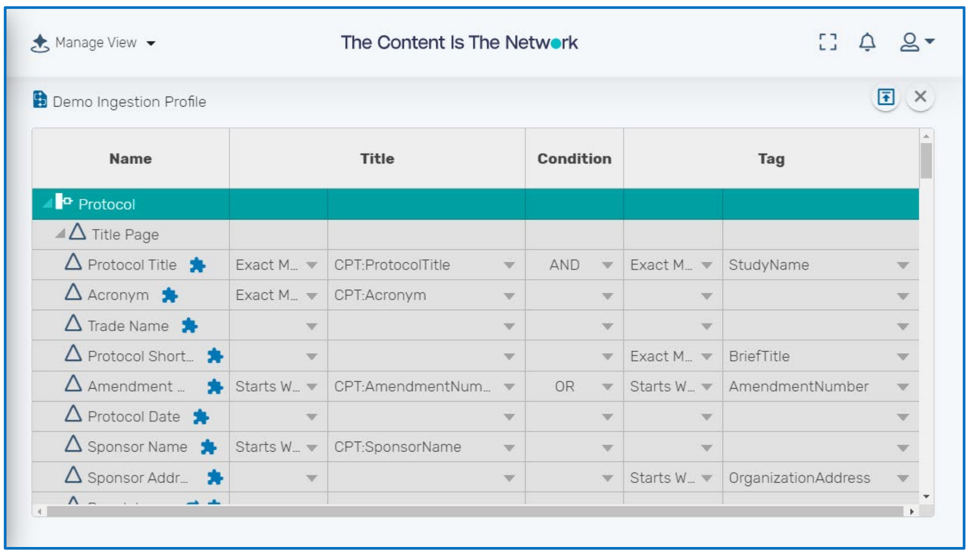
4. Browse and select a **Template File**. Click **Save**.



10.1.1 Manage Structured Ingestion Profile

1. Click the right-arrow option to launch the Ingestion Profile Explorer.

2. The **Manage Profile** view will display. This screen consists of a rule definition view in a tabular structure, where the user can define rules on **Title and Tag** property of content control from imported **Template File**. The definitions of the table columns are listed below.



- **Name** - Info model (Hierarchical Set) of the document type selected in step 3 for ingestion. Each element of the info model is listed on an individual row with its relevant icons based on its element type (eg, placeholder element, single de novo content control, etc)

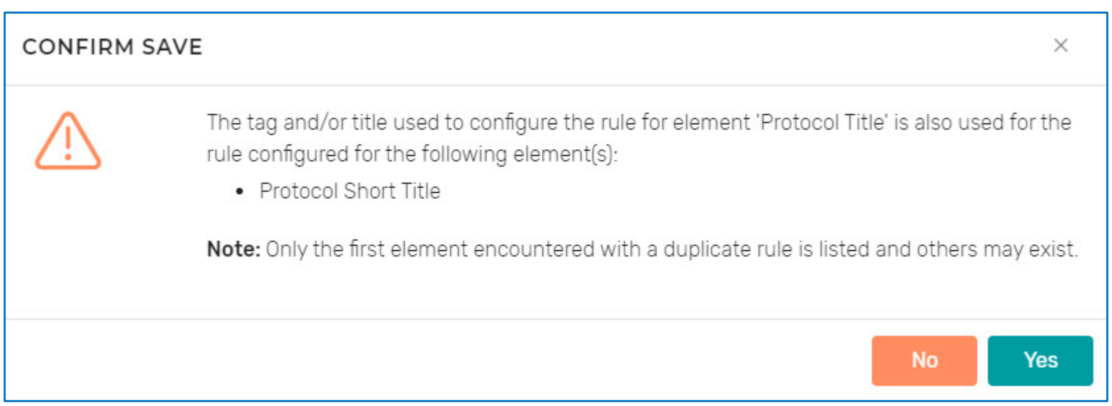
Note: Metadata/Property-Sourced Components (Variables) are not listed in the **Manage Profile** view.

- **Title**
  - **Column 1**- Mapping type
    - **Exact Match** - Select if the title of the component in the Template File matches with the title of the element in the Info Model (eg, Title)

        - **Starts With** - Select if the title of the component in the template file is similar to the title of the element in the info model (eg, **Brief Title** vs **Short Title**)
    - **Column 2** - Name
        - Title of the content control in the template file
- **Condition**
    - **AND** - if both the conditions should match
    - **OR** - if either of the conditions should match
- **Tag**
    - **Column 1** - Mapping type
        - **Exact Match** - Select if the title of the component in the template file matches with the title of the element in the Info Model (eg, Title)
        - **Starts With** - Select if the title of the component in the template file is similar to the title of the element in the info model (eg, **Brief Title** vs **Short Title**)
    - **Column 2** - Name
        - Tag of the content control in the template file

3. Map all the elements to their respective title and/or tag and save the profile using the **Save icon** in the top-right corner.

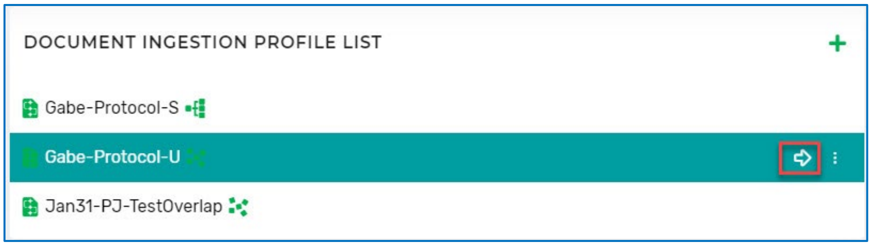
Note: If duplicate rules exist within the ingestion profile, the following warning message will display. Click **No** to reconfigure duplicate rules or **Yes** to save the ingestion profile with duplicate rules configured.



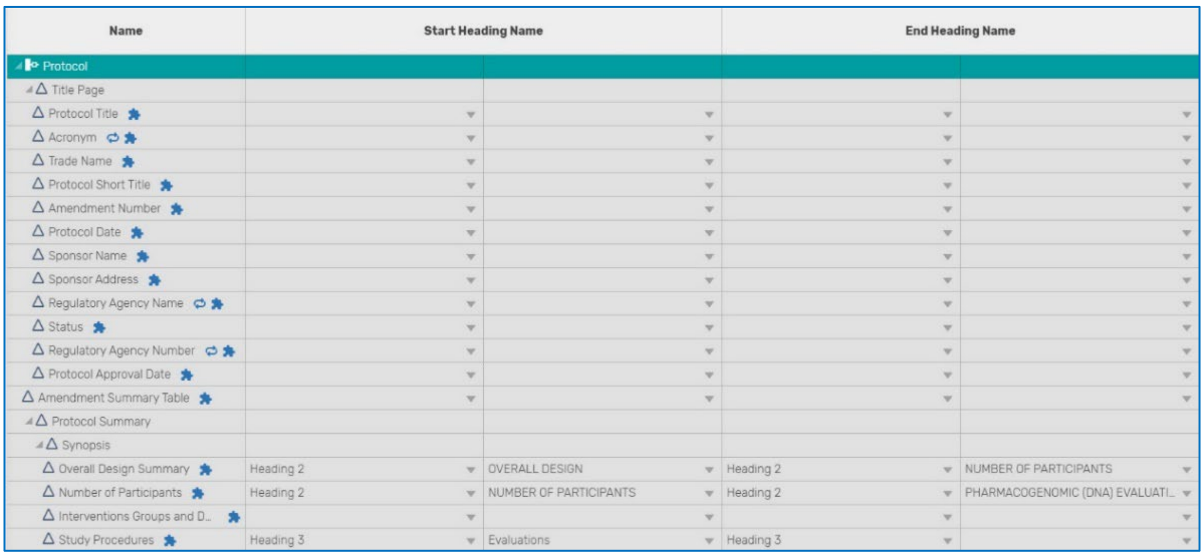
4. Once the ingestion profile is created, the user can begin the ingestion process (see Section 10.2).

10.1.2 Unstructured Ingestion Profile

1. Click the right-arrow option to launch the **Document Ingestion Profile List**.



2. The **Manage Profile** view will display. This screen consists of a page in tabular structure to map the headings from the Document Type Info. Model to **Start** and **End Headings** from the unstructured document Template. The definitions of the table columns are listed below.



Name	Start Heading Name		End Heading Name	
Protocol				
Title Page				
Protocol Title				
Acronym				
Trade Name				
Protocol Short Title				
Amendment Number				
Protocol Date				
Sponsor Name				
Sponsor Address				
Regulatory Agency Name				
Status				
Regulatory Agency Number				
Protocol Approval Date				
Amendment Summary Table				
Protocol Summary				
Synopsis				
Overall Design Summary	Heading 2	OVERALL DESIGN	Heading 2	NUMBER OF PARTICIPANTS
Number of Participants	Heading 2	NUMBER OF PARTICIPANTS	Heading 2	PHARMACOGENOMIC (DNA) EVALUATI...
Interventions Groups and D...				
Study Procedures	Heading 3	Evaluations	Heading 3	

- **Name** - Info model (Hierarchical Set) of the document type selected in step 3 for ingestion. Each element of the info model is listed on an individual row with its relevant icons based on its element type (eg, placeholder element, single de novo content control, etc.)

  > **Note: Metadata/Property-Sourced Components (Variables)** are not listed in the **Manage Profile** view.

- **Start Heading Name** - The system will auto-populate the heading level and heading name if it finds a match between the info model element name and the heading name in the template file.
  - **Column 1** - Heading level of the section in the template file

- **Column 2** - Heading name of the section in the template file

> **<u>Note:</u>** When creating an ingestion profile, if the element's name does not match the source template's heading name, the system will auto-populate the start heading in the element's rule using the element's Alias name(s), if available in the info model for that element.

- **End Heading Name** – For unstructured documents, the user must define where the chosen heading ends, as listed below:
    - **Column 1** - Heading level of the end heading section in the template file
    - **Column 2** – This is the heading name of the section in the template file up to which the content from the Start Heading name will be ingested.
        - Eg, if the **Start Heading Name** is Study Rationale and the **End Heading Name** is Overall Design, all the content belonging to Study Rationale section and below, up to Overall Design (Overall Design excluded), will be ingested.

        > **<u>Note:</u>** For the last section to be mapped, select the **End Heading** level but leave the **Heading Name** column 2 blank.

3. Map all the desired elements from the info model to sections to be ingested from the Template file. Save the profile using the **Save icon** in the top-right corner.

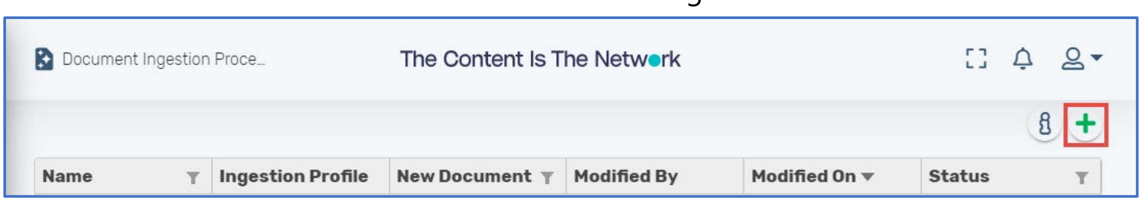
> **<u>Note:</u>** For unstructured ingestion profile, a warning message will be displayed if there are any overlapping rules in the profile. The user can cancel and fix the mapping or save and continue with the overlapped mapping.

4. Once the ingestion profile is created, the user can begin the ingestion process.

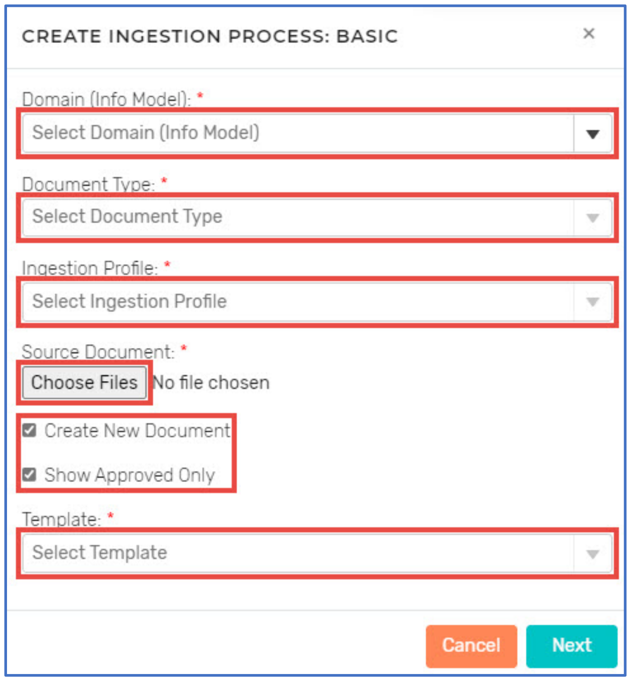
10.2 DOCUMENT INGESTION PROCESS

Once an ingestion profile is created for either a structured or unstructured document, the document can be ingested by creating an ingestion process using the steps below.

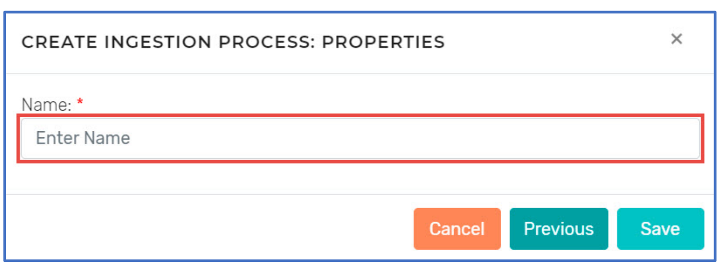
1. In the *Web Console*, hover over the **Utilities** option in the left-hand navigation pane and click **Document Ingestion** to view a list of **Completed** and **In Progress** ingestions.
2. Click the **add icon** + to start a new Document Ingestion.



3. On the **Create Ingestion: Basic** screen, select the **Domain (Info Model)**, **Document Type**, and **Ingestion Profile**. Click **Choose Files** and select the document to ingest.
   a. Check the **Create New Document** box to create a new document and select a **Template**.
   b. Uncheck the **Create New Document** box to ingest content into an existing managed library.

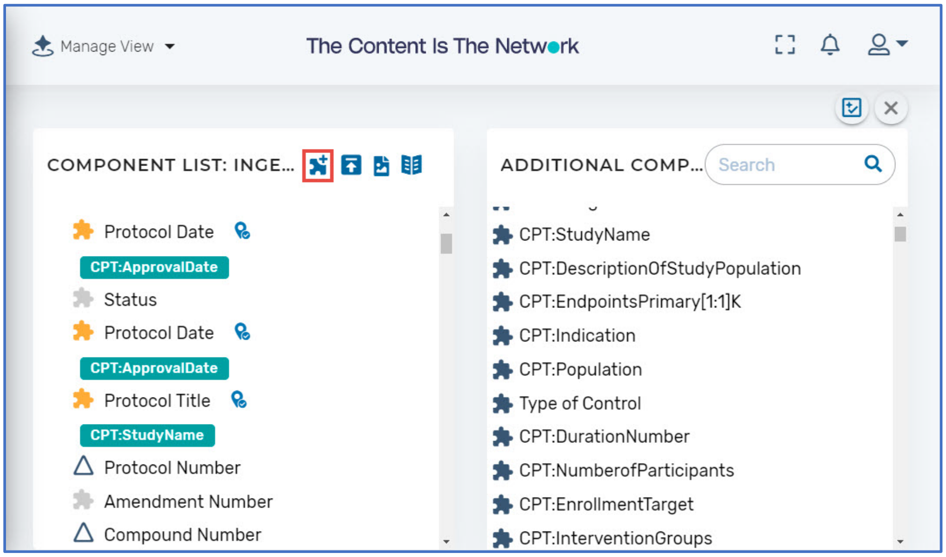


   c. Enter a **Name** and click **Save**.

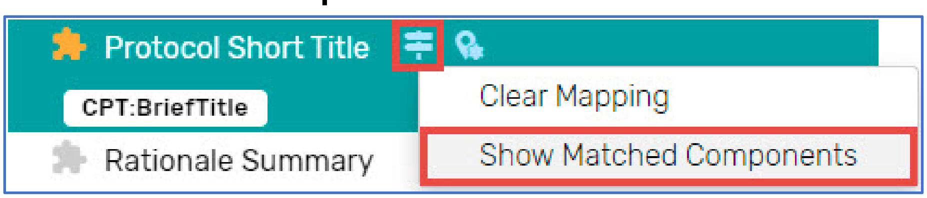


   d. The newly created ingestion is listed in the **Document Ingestion List**. Double click the ingestion process to open and view mapping. Right-click the ingestion process for options to download a source document or remove it.
   e. The **Ingestion Process** will display. The components belonging to the *InteliNotion* template selected in step 3, are listed under the **Component List** (left pane).

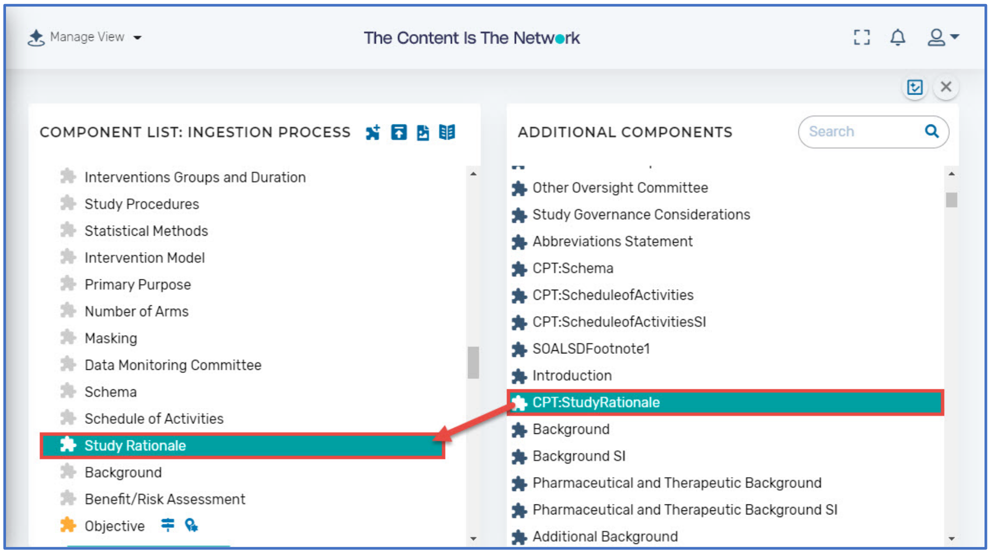
f. Click on the **Additional Components icon** to view components that have not been mapped in the **Ingestion Profile**. The **Additional Components** (right pane) are displayed.



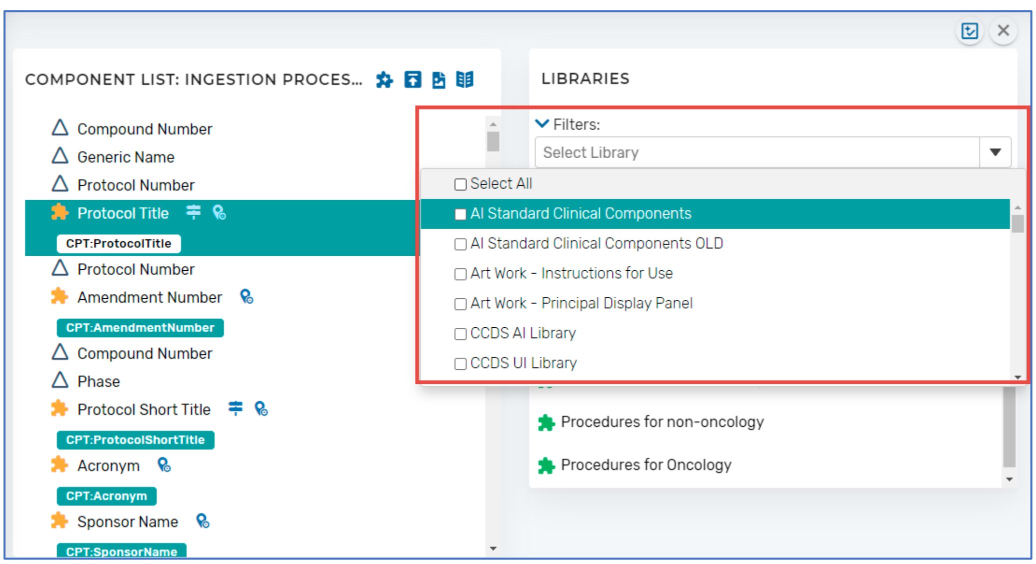
- Users can determine if a component is mapped manually or auto mapped based on the icon indicated beside the component under **Component List**:
  - - Auto Mapped Component (mapped in the ingestion profile)
  - - Manually Mapped Component (mapped in the ingestion process)
  - The user can also determine if a component has multiple matches based on the icon indicated beside the component, view the matches, and update their mapping if needed:
    - - Has multiple matched components
    - The user can right-click on such components and select the **Show Matched Components** to view the other matches.



g. Drag and drop from the **Additional Components** (right pane) to the matching component in the **Component List** (left pane) to establish a link. Repeat as necessary for all components. The components listed in the **Additional Components** pane will be removed from the list as they are mapped.

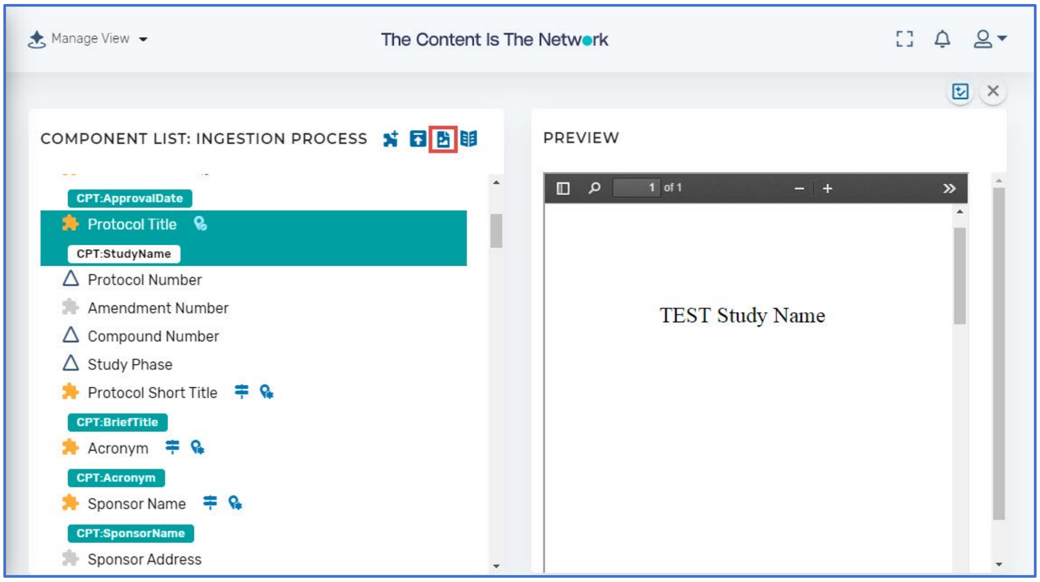


h. To map a component from the **Component List** (left pane) to a component belonging to an existing managed library, click the **Libraries icon** and select the relevant library from the **Filters** drop-down. This will pull content from the selected library after completing the ingestion process.

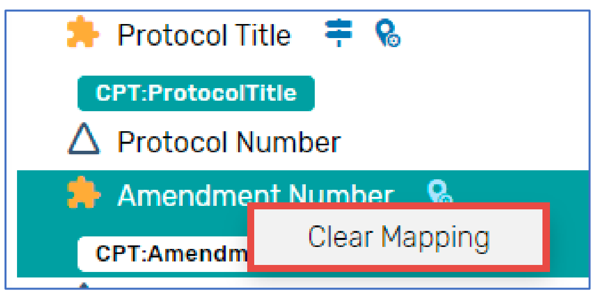


Note: Only the managed libraries bound to the elements inserted in the selected template for same object class components display in the Libraries Filters drop-down.

i. To preview the content of the component being ingested, click the **Preview icon** and the preview of the component will appear on the right pane.



j. To clear the mapping of a component, right-click on a mapped component from the **Component List** and click the **Clear Mapping** option. The unmapped component is added back to the **Additional Components** list on the right.

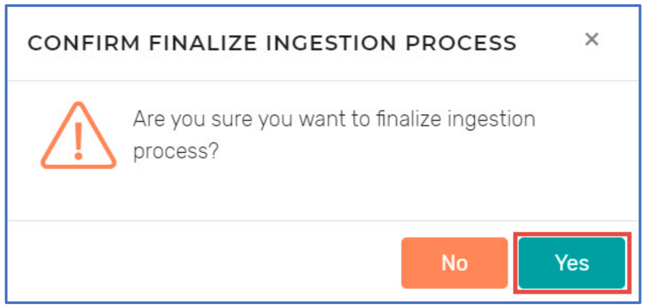


k. To save the mappings, click **Save** .

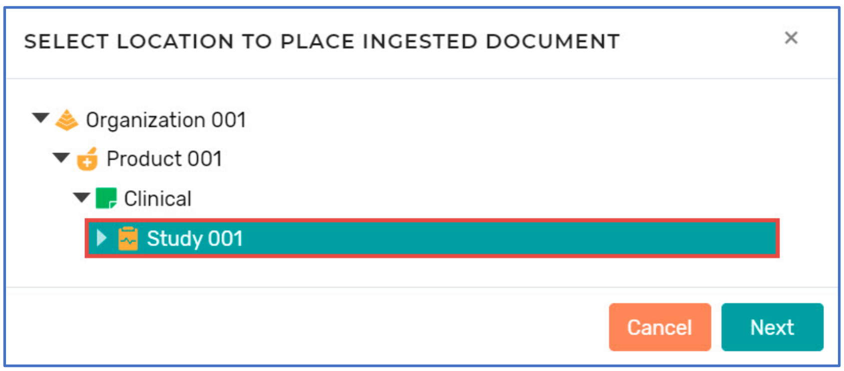
l. To close the ingestion process, click the **Close** option displayed in the top-right corner.

Note: Once all the components are mapped, the user can finalize the ingestion process and generate a document with ingested content.

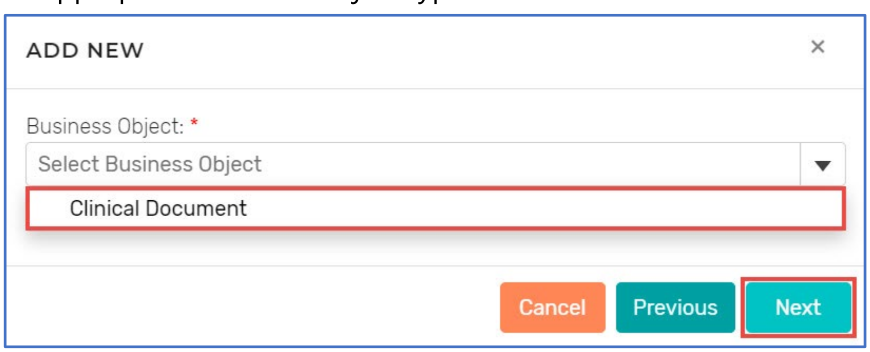
4. To finalize the ingestion process, click on the **Finalize Ingestion Process** option located at the top-right corner and confirm.



5. Select the location in the Navigator for the ingested document and click **Next**.



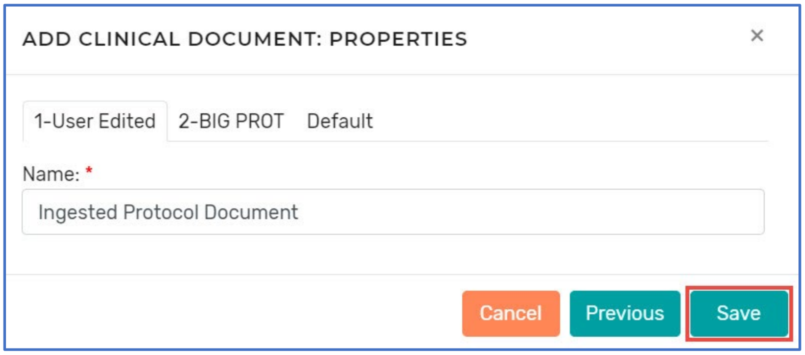
6. Select the appropriate business object type for the document and click **Next**.



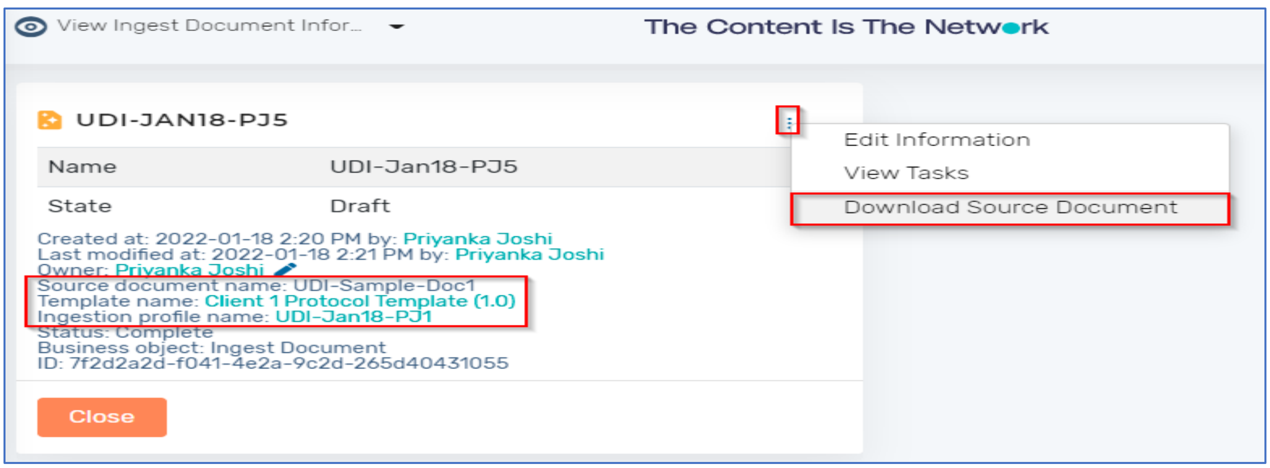
7. The **Add Document: Properties** form will display. Some values are pre-populated based on the associated properties for the document's parent business objects (eg, **Product**, **Study**). Enter, select, and/or update the properties, as appropriate, noting that some pre-populated values cannot be edited based on the system's configuration. The following special characters are not allowed in the **Name**: \, /, :, #, %, *, ?, <, >, |, “.

Note: When selecting certain property values, others may be auto populated or filtered based on the configuration.

8. Click **Save**.



9. The ingested document will be placed at the location selected by the user. The document can be edited (checked out) and authored following the steps mentioned in the **InteliNotion User Guide Module 5**.
10. **Ingestion Process** and **Source Document** can be determined from the right click → **View Information** action of an ingested document. **View Information** gives the ingestion process name. Click on **Ingestion Process Name** to download the source document used to ingest the newly created IN document.

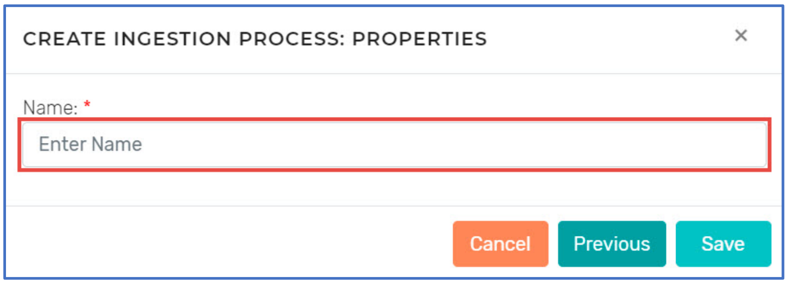


10.2.1 Update Properties for Multiple Components

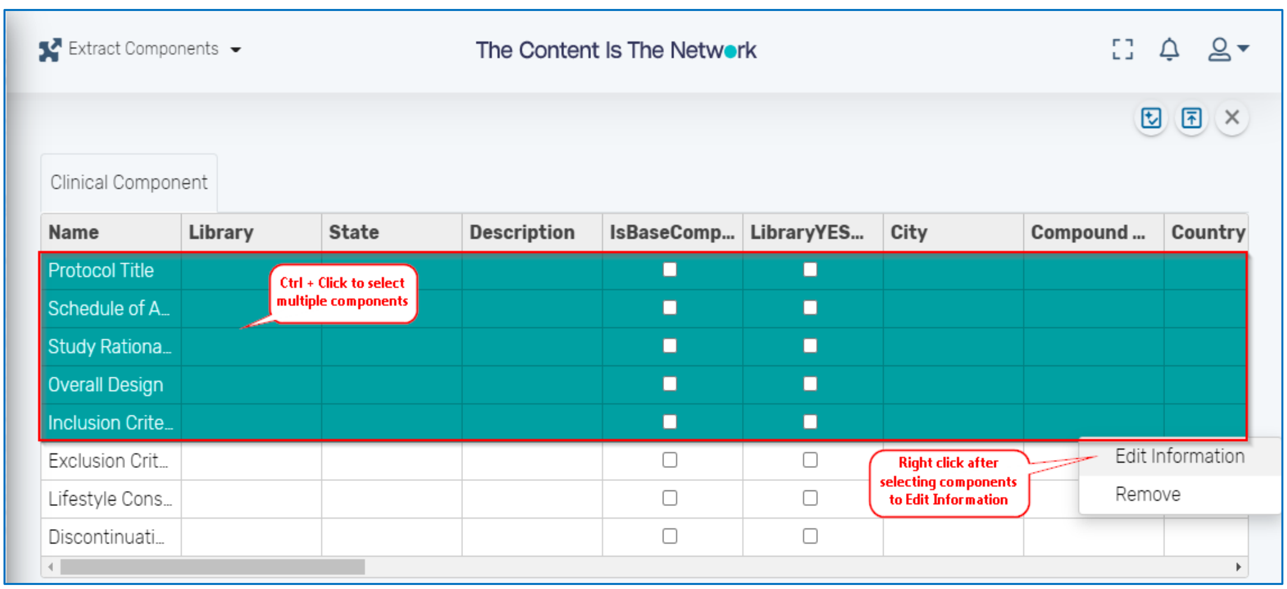
When "Uncheck the **Create New Document** box to ingest content into an **existing managed library**" is selected as shown in option 3b above, the user has the option to update properties of multiple components at once before the ingestion process is finalized.

Once the **Create New Document** checkbox is unchecked, follow the steps listed below to save the ingestion process and update multiple components.

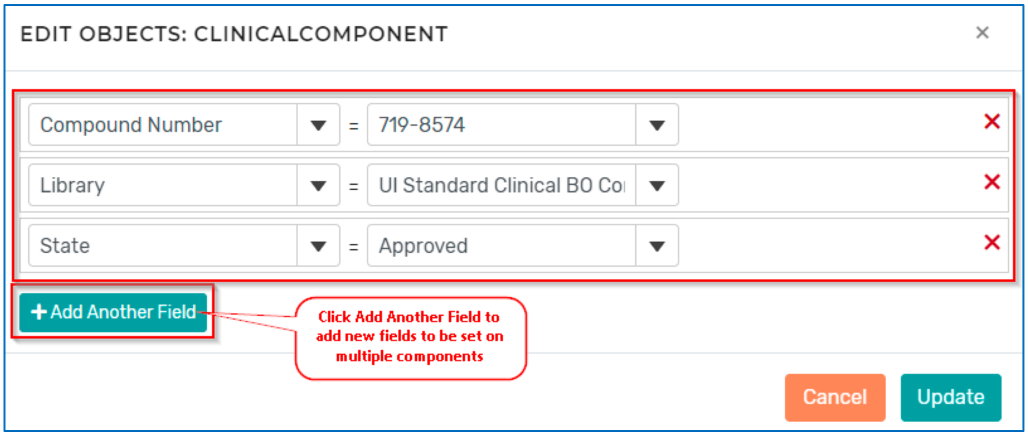
1. Enter a **Name** and click **Save**.



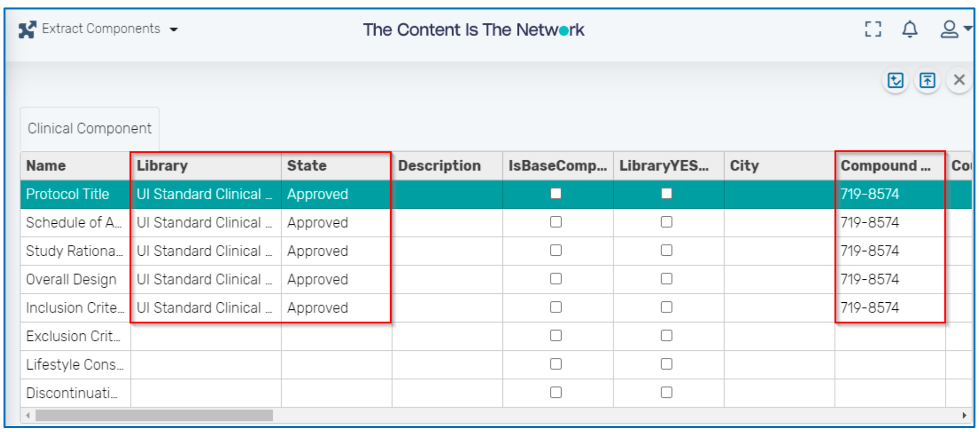
2. The newly created ingestion is listed in the **Document Ingestion List**. Double click the ingestion process to open **Extract Components** data sheet view.
3. Use **Ctrl** + **click** or **Shift** + **click** to select multiple rows in the data sheet view. Right click to **Edit Information** on the components.



4. The **Edit Objects: Clinical Component** window will open. Click **Add Another Field** to add desired properties to be set at once on multiple components.



5. Click **Update**. The **Extract Components** UI page will display components with updated properties on all the selected components.



Notes:

- Before finalizing the ingestion process (based on the selected ingestion profile), components under the **Additional Components** tab can be multi selected using **CTRL** + **click** or **Shift** + **click** and re-assigned to another component business object class. Those components must be bound to an element in the relevant info model and mapped to a component in the ingestion profile.
- The components cannot be reassigned to another component business object class that has not been used in the relevant info model (based on the selected ingestion profile).
- After re-assigning the components to another component business object class, they will be listed under the tab/view for the selected class, accordingly.

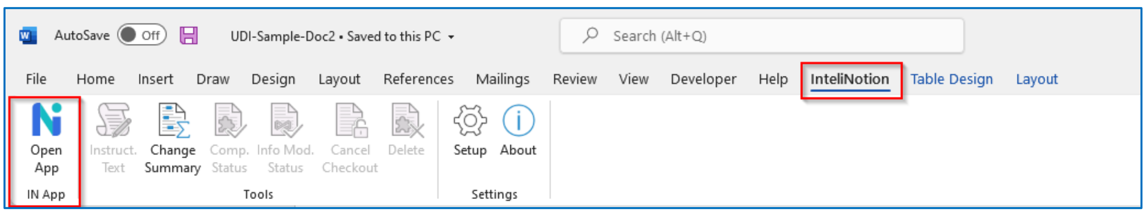
6. Once all the components are updated with relevant properties and values, the user can finalize the ingestion process and generate library components with ingested content.

10.3 USER SELECTED CONTENT DOCUMENT INGESTION

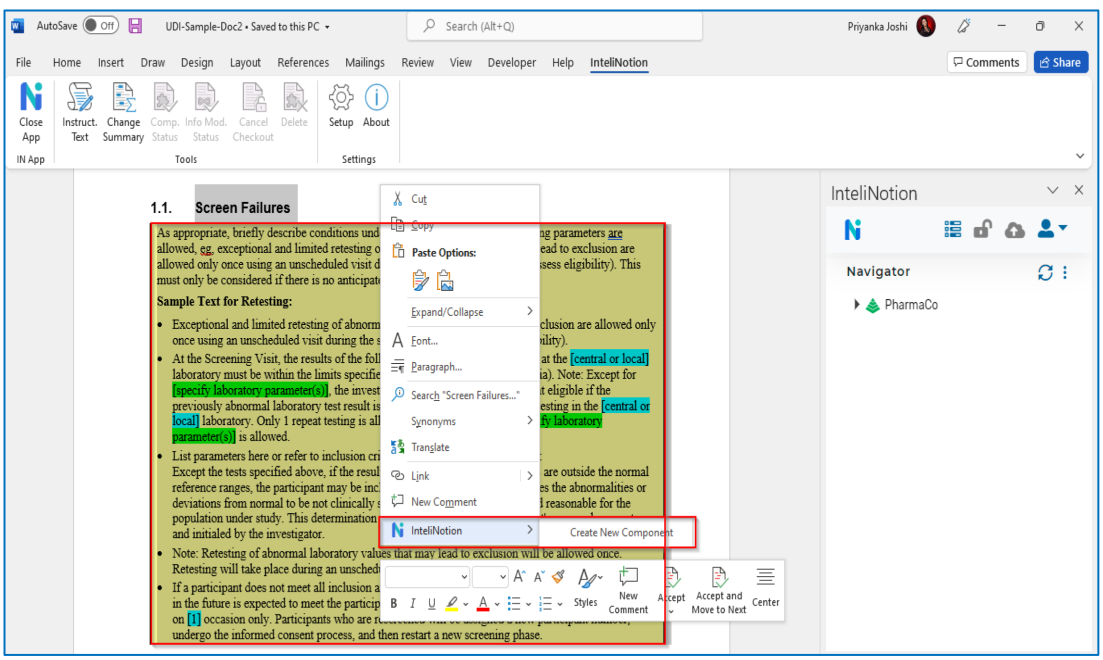
Content within a non-*InteliNotion* document can be ingested by the system to create an *InteliNotion* library component. Authorized users select the managed library into which the content will get ingested as a component, which will then inherit all the selected managed library properties.

Note: To use this function, the *InteliNotion Word add-in* should be installed on the user's computer

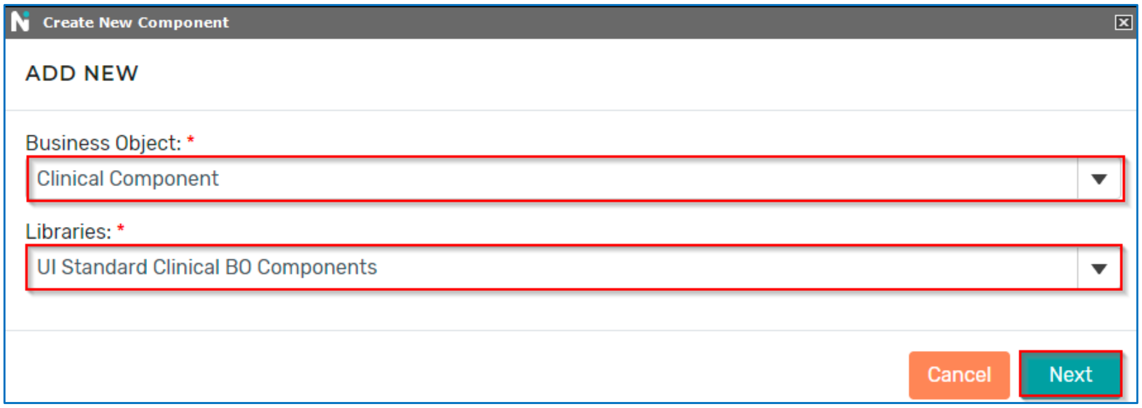
1. In Microsoft Word, open the non-*InteliNotion* document from which content will be ingested.
2. Open the *InteliNotion Word app* from the *InteliNotion* tab on the developer ribbon. This will open the *InteliNotion* navigator in the right pane.



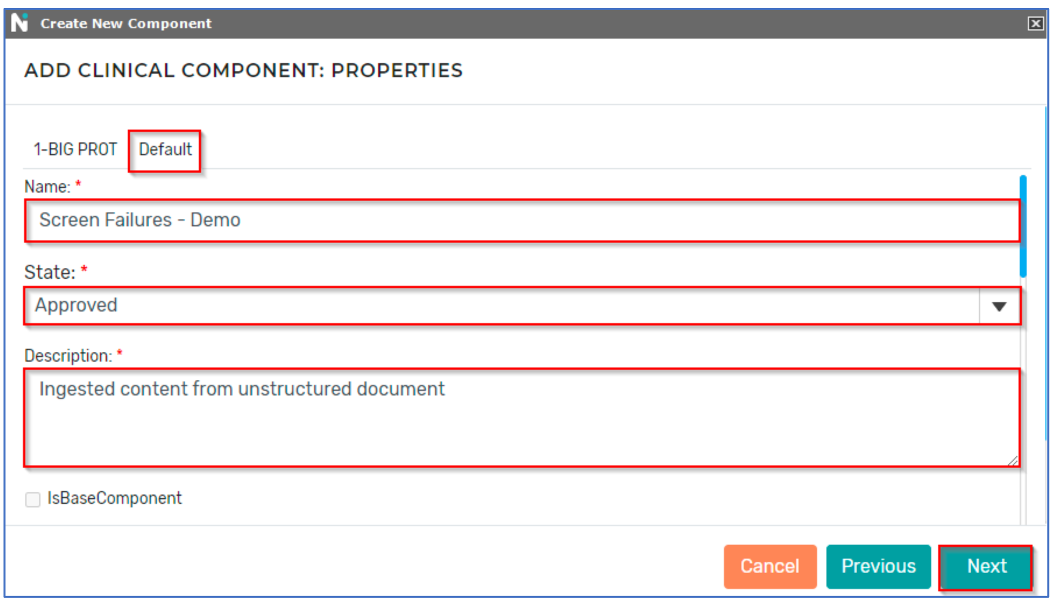
3. Select or highlight content to be ingested, right click, and select **Create New Component**.



4. The **Create New Component** window will open. Select the applicable **Business Object** for the component, select the managed **Library** into which the component will be ingested and click **Next**.

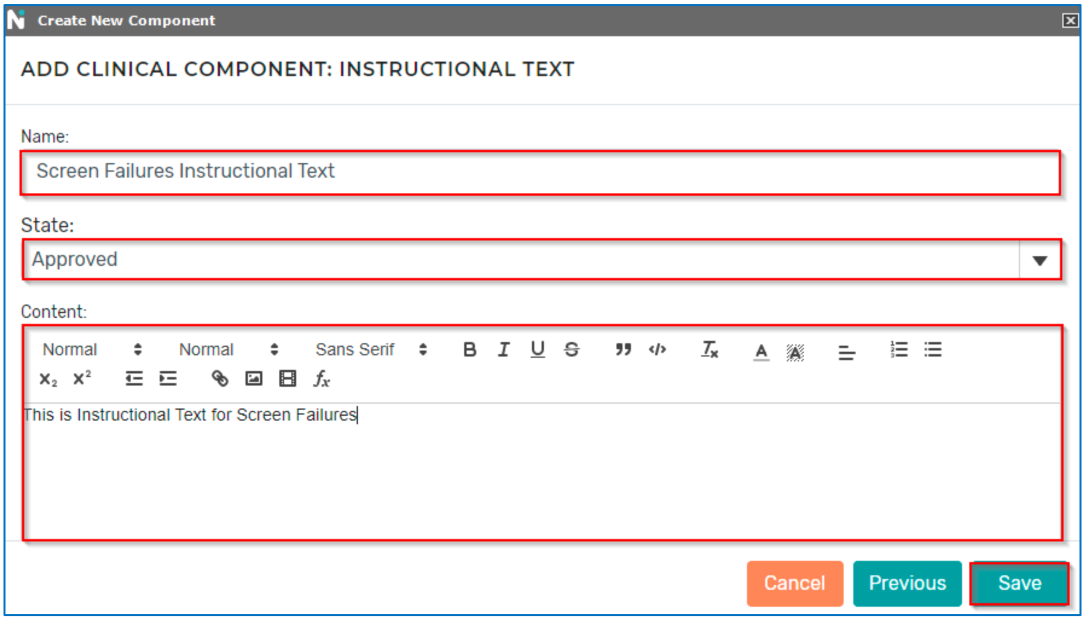


5. Properties selection dialog will open for the component. Under **Default** tab, select **Name**, **State** and **Description** for the component and click **Next**.

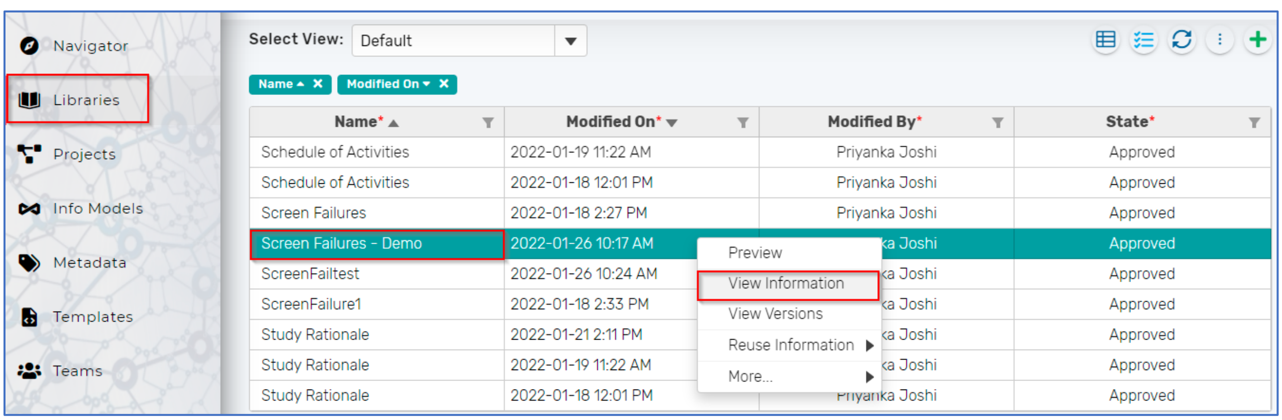


6. The **Add Clinical Component Instructional Text** window will open. This is optional. If instructional text is available, it can be entered at this time for the ingested component.

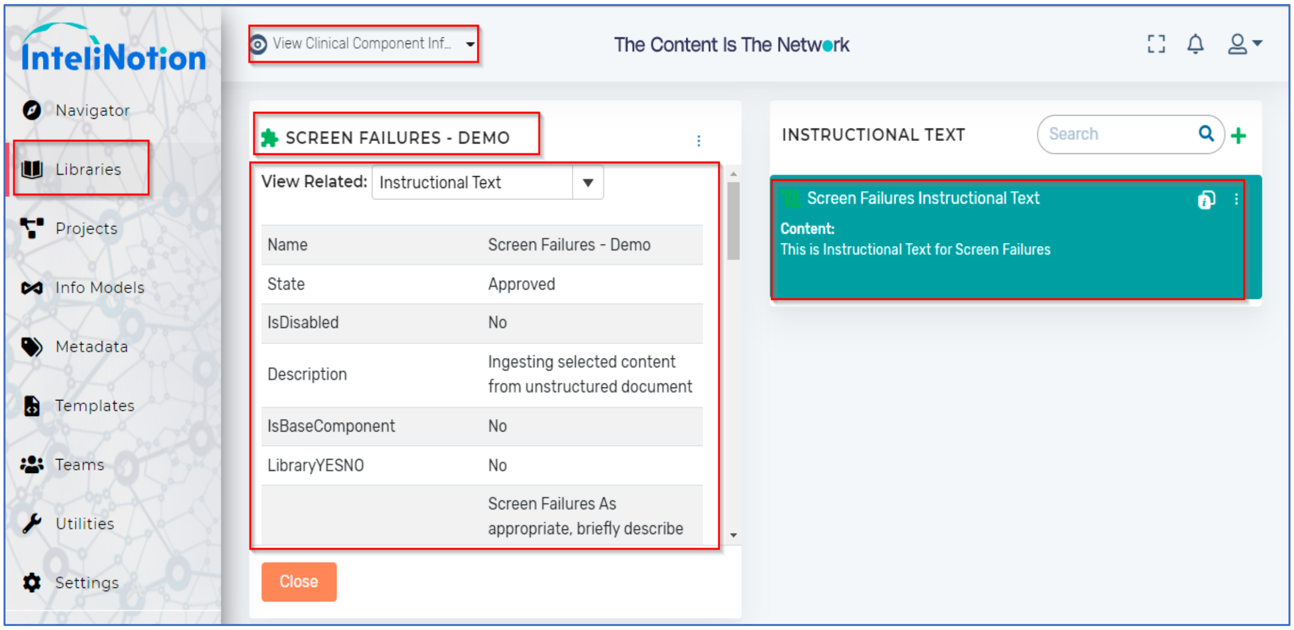
7. Enter **Name**, **State** and **Content** of the instructional text and click **Save.** If no instructional text is available, click **Save** without entering any information in the **Name**, **State** and **Content** fields. The **Component Added Successfully** prompt will display.



8. In the *Web Console*, click on the **Libraries** option in the left-hand navigation pane. Open the managed library and find the ingested component. Right click on the component and click **View Information.**



9. The Component **information** entered during ingestion will display for the library component along with **Instructional Text** if applicable.



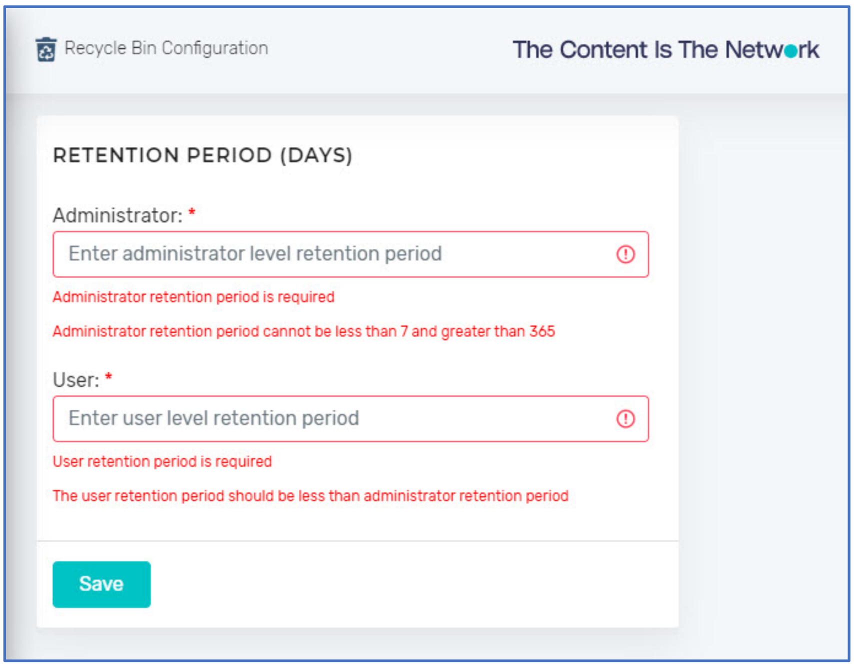
11. RECYCLE BIN FUNCTIONALITY

When objects are deleted from the system, they are moved to a recycle bin. An individual user can view his/her deleted items, and an admin can view all deleted items. Deleted items may also be restored as long as they have not been permanently removed from the system according to the retention period.

11.1 SETTING RECYCLE BIN RETENTION PERIOD

The recycle bin has a default retention period of 30 days for admins and 15 days for end-users (non-admins). The default settings can be changed as outlined below.

1. Click on **Settings** in the *Web Console* and click **Recycle Bin**.
2. The **Recycle Bin Configuration** pane will open. The retention period for admins can be set for as little as 7 days or as many as 365 days. The retention period for end-users can be set to any number of days as long as it is less than the admin number of days. These will be manually entered.

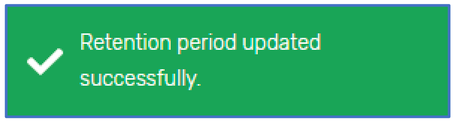


Notes:

- As the Admin retention period is longer than the user retention period, the deleted object will be hidden from the user, but will still be present in the system. Once the admin retention period is complete, the deleted object will be permanently removed from the system.

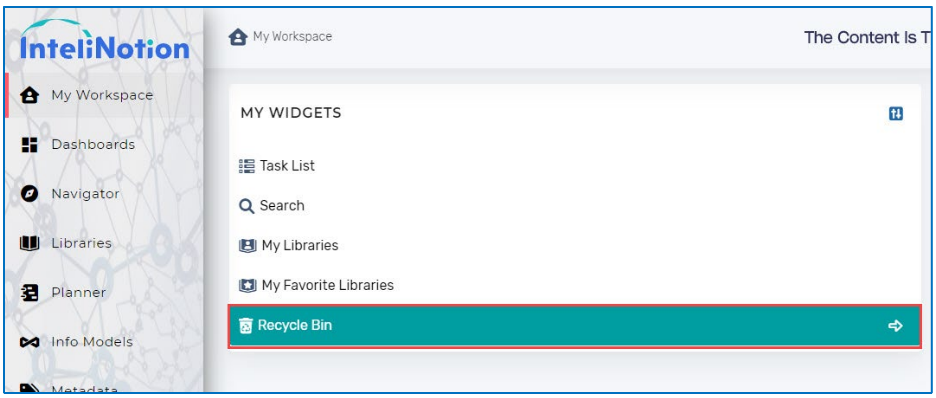
- If an object is deleted by an admin, it will remain in the user view until the user retention period is complete, at which time it will move to the admin view or show all view.

3. Click **Save** to set the retention periods for the recycle bin.
4. A Retention period successfully saved message displays.

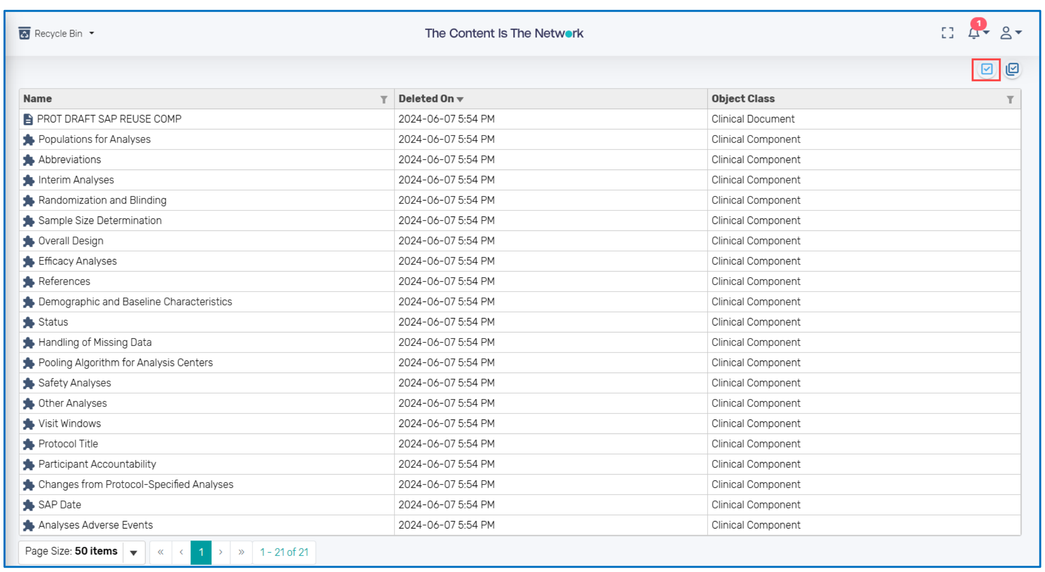


11.2 VIEWING AND RESTORING DELETED ITEMS

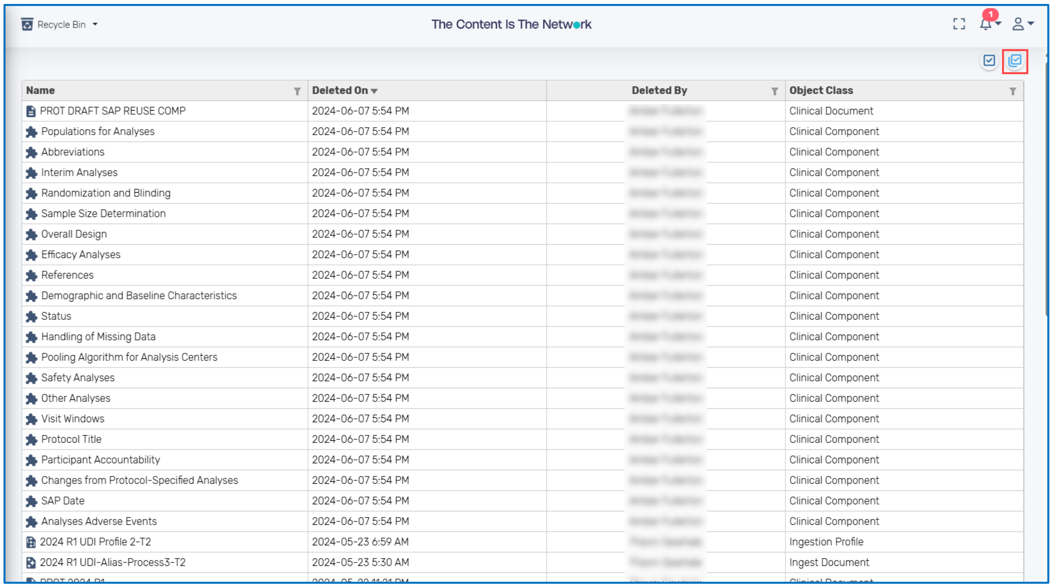
1. In the *Web Console*, select **My Workspace** from the navigation panel.
2. **My Widgets** will display. Select the blue arrow icon or double-click Recycle Bin.



3. The recycle bin will open and display the individual user's deleted objects by default.



4. Click the **show all** **icon** in the top-right corner of the screen to view all deleted items.



Note: Refer to **InteliNotion User Guide Module 5** for instructions on how to restore deleted objects/items.

The matrix below identifies the behavior for when various objects are deleted and then restored in the system.

Note: If an item is deleted with related or child items (eg, a hierarchical set with related elements), if/when one of those related elements is restored (eg, a single element that was deleted along with the hierarchical set), everything that was deleted will be restored together.

Area	**Business Object Type**	**Can Delete?**	**Can Restore from Recycle Bin?**
Navigator	User-added business object (eg, Product, Study, etc.)	With child business object: ❌ Without child business object: ✔	✔
	Document	With child business object: ✔ Without child business object: ✔ **Note** Along with the document its associated child(ren) business object (ie, component) is also deleted	✔ **Note** Along with the document its associated child(ren) business object (ie, component) is also restored, as well as all instructional text and library components

Area	Business Object Type	Can Delete?	Can Restore from Recycle Bin?
	Component (from within document)	✔	✔
	Variable (from within document)	✔ **<u>Note</u>** Does not appear in the recycle bin	N/A
Libraries	Library Component	✔ **<u>Note</u>** If the parent library is also deleted, refer to Section 6.2 of the **InteliNotion Authoring Configurations Guide** to learn how to access those components using a non-managed library of orphaned components	✔
	(Managed) Library	✔ **<u>Note</u>** Does not appear in the recycle bin; in addition, the library components are not deleted along with the managed library	N/A
Info Models	Element (for content)	✔ **<u>Note</u>** Along with the element, any associated element-level instructional text is also deleted	✔ **<u>Note</u>** Along with the element, any associated element-level instructional text is also restored
	Element (for variable)	✔	✔
	Hierarchical Set	With child business object: ✔ Without child business object: ✔ **<u>Note</u>** Along with the hierarchical set, any associated child elements are also deleted	✔ **<u>Note</u>** Along with hierarchical set, any associated child elements are also restored
	Instructional Text	✔	✔ **<u>Note</u>** Restored uniquely, unless deleted as part of its related element or library component, in which case, all related elements would be restored with the instructional text

Area	Business Object Type	Can Delete?	Can Restore from Recycle Bin?
	Common Instructional Text	✔ **Note** Does not appear in the recycle bin when removed from an associated element	✔
Metadata	Catalog	With associated subcategory(ies) bound to a business object class: ❌ With associated subcategory(ies) **not** bound to a business object class: ✔ **Note** Along with the catalog, its associated category(ies), subcategory(ies), and value(s) will also be deleted	✔ **Note** Along with the catalog, its associated category(ies), subcategory(ies), and value(s) will also be restored
	Category	With associated subcategory(ies) and its value(s) bound to a business object: ❌ With associated subcategory(ies) and its value(s) **not** bound to a business object: ✔ **Note** Along with the category, its associated subcategory(ies) and value(s) will also be deleted	✔ **Note** Along with the category, its associated subcategory(ies) and value(s) will also be restored
	Subcategory	With associated subcategory(ies) and/or its value(s) bound to a business object: ❌ With associated subcategory(ies) and/or its value(s) **not** bound to a business object: ✔ **Note** Along with the subcategory, its associated subcategory(ies) and value(s) will also be deleted	✔ **Note** Along with the subcategory, its associated subcategory(ies) and value(s) will also be deleted
	Value	✔	✔
Templates	Template	✔	✔
	Element (from within template)	✔ **Note** Does not appear in the recycle bin when removed from a template	N/A
	Base Component (from template)	✔	✔

Area	Business Object Type	Can Delete?	Can Restore from Recycle Bin?
	Variable (from within template)	✔ **<u>Note</u>** Does not appear in the recycle bin when removed from a template	N/A
Teams	Role	✔ **<u>Note</u>** Does not appear in the recycle bin when removed from the team	N/A
Teams	Team	✔ **<u>Note</u>** Does not appear in the recycle bin	N/A
Settings: Notifications	Notification Template	Bound to lifecycle transition(s) of business object(s): ❌ Not bound to lifecycle transition(s) of business object(s): ✔ **<u>Note</u>** Does not appear in the recycle bin	N/A N/A
Settings: Business Objects	Business Object [class]	Instances created within the system: ❌ No instances created within the system: ✔ **<u>Note</u>** Does not appear in the recycle bin	N/A N/A
Settings: Content Tagging	Component Tag	✔	✔ **<u>Note</u>** After restoring a component tag, it is re-associated with an info model element(s), if applicable
Settings: Content Tagging	Content Tag	✔	✔
My Settings: Widgets	Widget	✔ **<u>Note</u>** Does not appear in the recycle bin	N/A

12. EXTERNAL CONNECTORS

InteliNotion supports 2 types of connectors: Repository and Collaborative Review. Details for each connector type are provided in the sections below.

12.1 REPOSITORY CONNECTOR

This section provides an overview of repository connectors and the procedures for configuring them in InteliNotion. Repositories are GxP Content Management systems, such as Regulatory Information Management (RIM) and eTMF (Trial Master File), responsible for approving the documents authored in InteliNotion.

InteliNotion provides connectors for the following repositories and their versions:

- OpenText Documentum D2 version 16.4
- OpenText Documentum D2 version 20.2
- Veeva Vault versions 23.3 and higher
- Generis CARA version 3.11, 3.12 (with OpenText Documentum backend)
- InteliNotion CARA connector supports two types: CARA with MuleSoft proxy and CARA with Axway proxy. Both types contain elements that vary from a client to client as described below:
  - Use of proxy or middleware: Middleware such as MuleSoft or Axway often require connectivity configurations specific to the product and/or setup.
  - Authentication: Some clients require multi-factor and/or certificate-based authentication. This is a configurable setting that is enabled/disabled by default depending on the proxy type. Contact your InteliNotion representative for more details.
  - Document classification: Document taxonomy/classification varies from a client to client.
  - Business rules for required metadata and values: In exceptional cases, special logic is required to handle specific business rules imposed by repositories.

Before users can transfer and save documents to a repository, connector configuration is required in InteliNotion to specify:

- Connectivity and authentication information
- Document classification information
- Metadata mapping information

These configurations are performed in 2 steps: **Connector Instances** and **Connector Profiles**. See the following subsections for instructions on how to complete these processes.

12.1.1 Configure Connector Instance

InteliNotion supports two methods for connecting to and authenticating against repositories. One of them is to use a service account. Service accounts are special accounts used to connect different systems or programs. They have permission to access data and perform tasks between these systems, making it possible for them to share information and work together smoothly.

Depending on the repository in use, a set of privileges are required for InteliNotion to use a service account and perform a variety of tasks in order to configure the connector and transfer documents.

The following subsections list these privileges for each repository type.

12.1.1.1 Veeva Service Account Requirements

The following are the service account requirements for Veeva Vault:

- The service account must have **Access API** and **Metadata API** permissions.

  > **Note:** Metadata API permission is needed ONLY for configuring metadata mapping.

- The service account must have **Cancel Checkout**, **Download Document** and **Download Rendition** permissions for document.
- The service account must have **Read** access on all objects that are expected to be accessed or transferred by *InteliNotion*.
- The service account must have **Edit Fields**, **Edit Document** and **Version** permissions for **Draft** and **Approved** lifecycle states at minimum to create a new draft version (if so configured).

  > **Note:** If version permission is not granted for the **Approved** lifecycle state, then users must create a new draft version of approved documents manually in Vault before attempting to transfer it again from *InteliNotion*.

12.1.1.2 Documentum D2 Service Account Requirements

There are no specific/additional privileges required for the Documentum connector compared to end user permissions required to create and up-version documents. In general, the following requirements apply:

- REST API access
- Retrieve D2 configuration (for classification and metadata mapping)
- Create/Import a document
- Check out, check in and cancel checkout a document

12.1.1.3 CARA Service Account Requirements

There are no specific/additional privileges required for the Documentum connector compared to end user permissions required to create and up-version documents. In general, the following requirements apply:

- CARA REST API access
- Retrieve CARA configuration (for classification and metadata mapping)
- Create/Import a document
- Check out, check in and cancel checkout a document

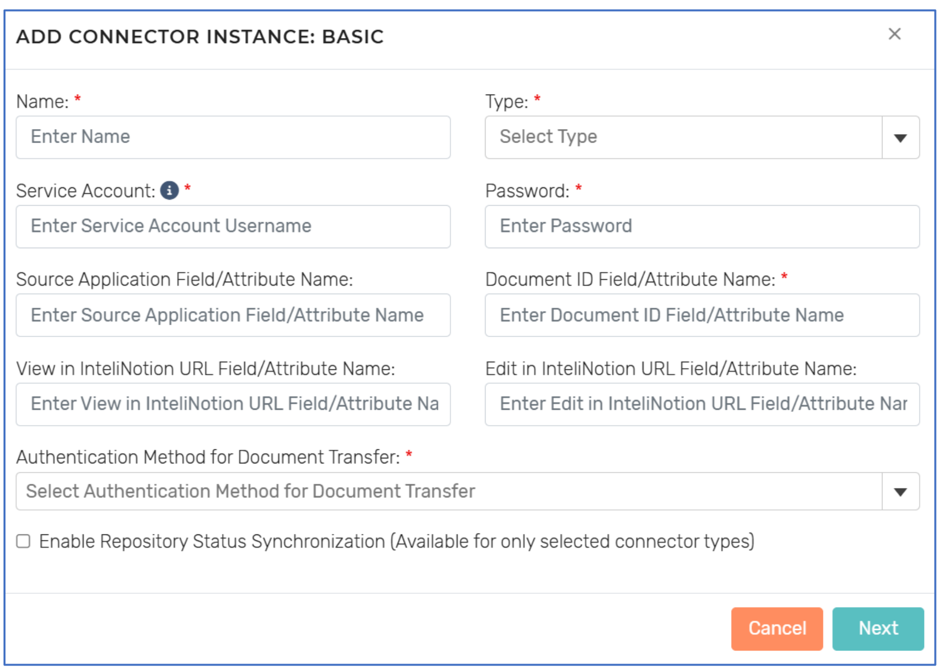
12.1.2 Configure Connector Properties

Connector instances define connectivity and global repository-level configurations. Multiple instances can be created; however, only one unique instance per repository can be created. The uniqueness criteria vary from repository to repository as described later in this section.

Refer to the steps below for general instructions for configuring a connector instance.

Note: The steps to configure repository specific parameters are covered in Sections 12.1.1.1-12.1.1.3.

1. Hover over **Settings** in the left navigation pane and click **External Connectors**.
2. Click the plus icon to create a new connector. The **Add Connector Instance: Basic** screen will display.



Enter the basic information as described below; the mandatory fields are denoted with the *:

- **Name** – A suitable name for the connector, usually the name of the repository application.
- **Type** – Displays the available repository types. Select a repository platform of your choice.
- **Service account** – The privileged account to be used for connector instance and profile setup. These credentials will be validated and saved for future use.
- **Authentication Method for Document Transfer** – The following options are listed to select the desired authentication method while transferring the documents manually or automatically.
    - **Use the privileged account specified above**: The service account will be used for all communication with the repository. All transferred documents will have the service account displayed as the created/modified username.
    - **Prompt users for their credentials**: This option is available only for manual profiles. For automatic profiles, the privileged account option must be used (see **InteliNotion User Guide Module 11** for details).
- **Source Application Field/Attribute Name** – Identifies the field name in the repository to populate the application name in (ie, InteliNotion where the documents originate and are authored). If the data type of this field is text in repository, the value **InteliNotion** will be passed. If it is Boolean, then No/False value will be passed (depending on the repository).
- **View in InteliNotion URL Field/Attribute Name** – Identifies the view URL field name in the repository to populate the document view-object URL. This information will be used by the target repository to redirect the user to view the document information in *InteliNotion*.
- **Edit in InteliNotion URL Field/Attribute Name** – Identifies the edit URL field name in the repository to populate the document edit-object URL. This information will be used by the target repository to redirect the user to *InteliNotion* and perform the checkout operation for the selected document.
- **Document ID Field/Attribute Name:** This field will be used to populate *InteliNotion* Document ID when the document is first transferred to the repository. This field can be used for traceability and configuring URLs to redirect users to the document in *InteliNotion*.

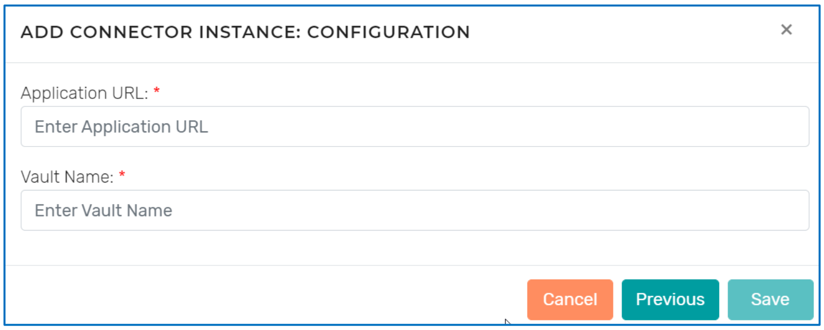
3. Click **Next**. The **Add Connector Instance: Configuration** form will open. This form is specific to the selected repository.

Continue with the appropriate section below depending on the repository type.

12.1.2.1 Configure Veeva-Specific Properties

Follow the steps below to complete the connector instance configuration for Veeva Vault.

1. **Application URL** – Enter the Veeva Vault URL and Vault name, where the URL is the base URL (eg, https://companyname.veevavault.com).
2. **Vault Name** – Name of the target vault where documents will be transferred to.



Note: Each instance is required to be unique for the URL and name combination.

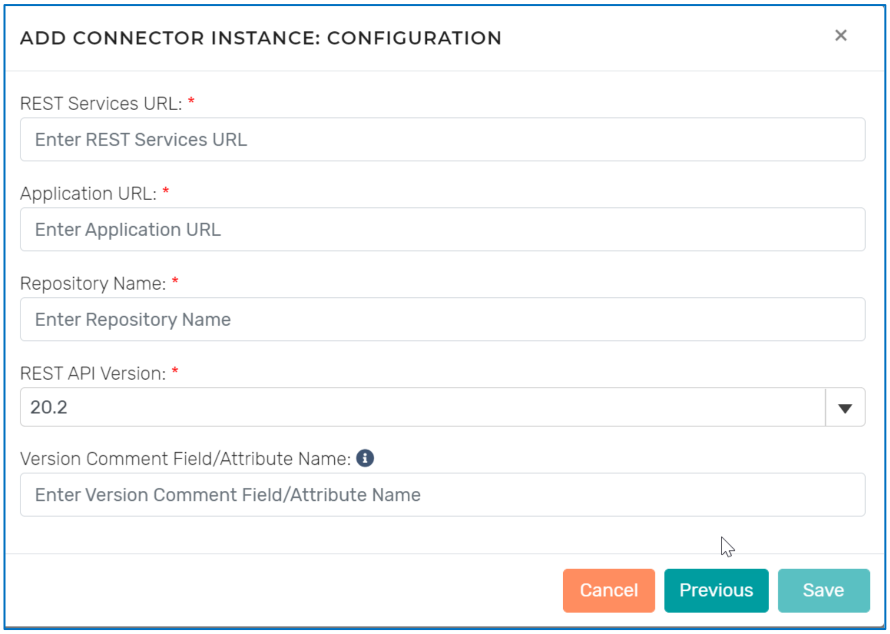
3. Click **Save**. The system will attempt to connect to the repository and validate the parameters provided. If unsuccessful, an error message will display. If successful, the configuration will be saved.

12.1.2.2 Configure Documentum-Specific Properties

Follow the steps below to complete the connector instance configuration for OpenText Documentum D2.

1. In the **Add Connector Instance: Configuration** form, enter the repository information.
    - **REST Services URL** - Base URL for the Documentum REST API. This is a different URL than the application URL below.
    - **Application URL** - Documentum D2 application URL.
    - **Repository Name** - Name of the repository.
    - **API version** - The API version for Documentum REST API used for document transfer. Available options are 16.4 and 20.2. with 20.2 as the default.

- **Version Comment Field/Attribute Name** - Repository field name for populating check-in comments. If specified, it will include additional information for each check-in performed.



2. Click **Save**. The system will attempt to connect to the repository and validate the parameters provided. If unsuccessful, an error message will display. If successful, the configuration will be saved.

12.1.2.3 Configure Properties specific to CARA using MuleSoft Proxy

When utilizing MuleSoft proxy, it is required to use a dedicated proxy account in addition to the CARA service account by default. Follow the steps below to complete the connector instance configuration for CARA connector using MuleSoft Proxy.

1. On the **Add Connector Instance: Configuration** form, enter the repository specific information:
   - **Federate URL**: Single Sign-on server URL for authenticating the proxy account credentials
   - **CARA REST URL**: CARA REST API URL
   - **Application URL**: CARA Application URL for the end user interface
   - **Repository Name**: Name of the target repository
   - **Proxy Username**: Proxy username for the MuleSoft layer
   - **Proxy Password**: Proxy password for the MuleSoft layer

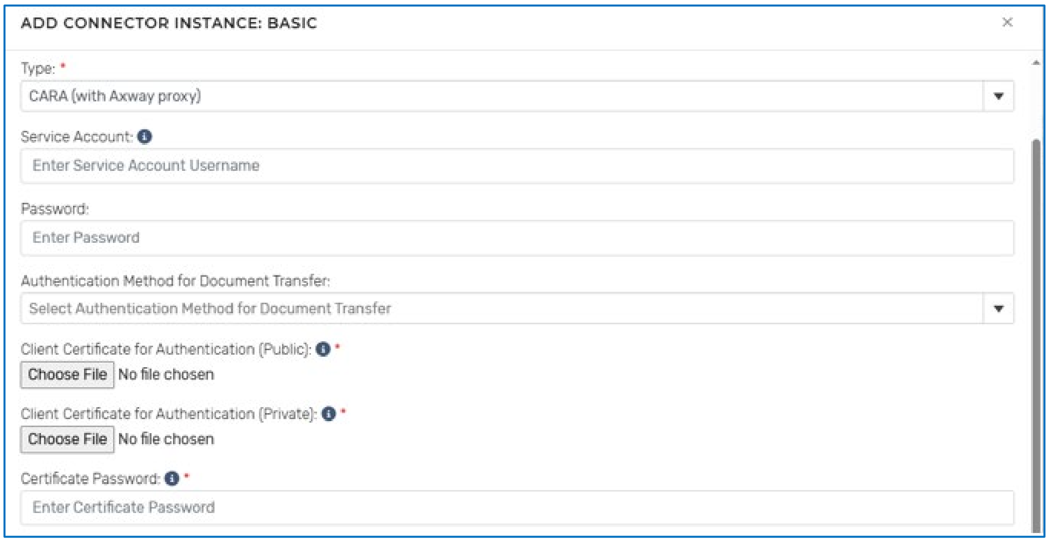
- **Version Comment Field/Attribute Name**: Repository attribute name to use for populating check-in comments. If specified, it will include additional information for each check-in performed.

2. Click **Save**. The system will attempt to connect to the repository and validate the parameters provided. If unsuccessful, an error message will display. If successful, the configuration will be saved.

12.1.2.4 Configure Properties specific to CARA using Axway Proxy

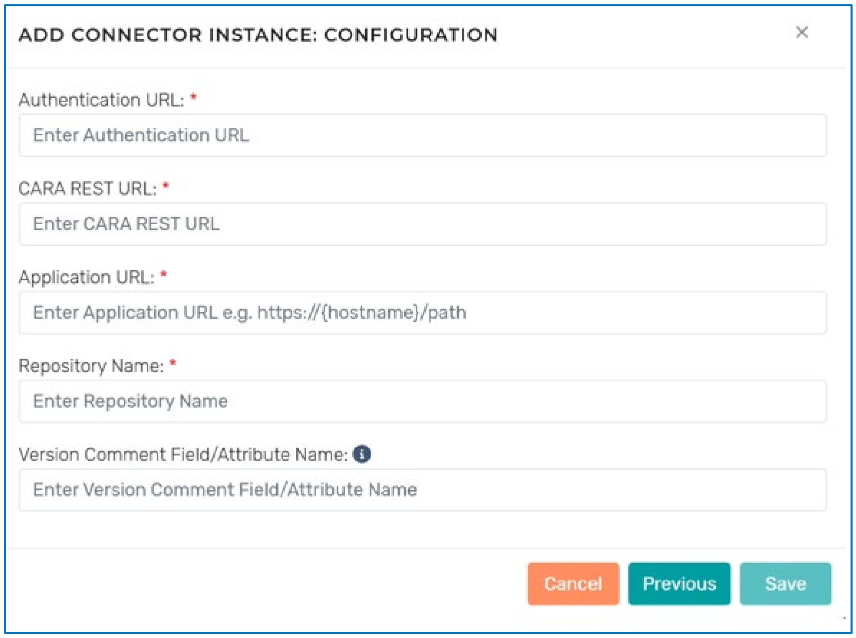
CARA connector with Axway Proxy is configured by default to utilize certificate based authentication. Follow the steps below to complete the connector instance configuration for CARA Connector using Axway proxy.

1. On the **Add Connector Instance: Basic** form, certificate related fields are displayed in addition to the common fields described above.



2. Provide the required client certificate information:
   - **Client Certificate for Authentication (Public)**: A public key for the client certificate in .crt or .pem format that will be sent along with each API call for the client authentication purpose.
   - **Client Certificate for Authentication (Private)**: The private key for the client certificate in .key, .crt or .pem format.
   - **Certificate Password**: The passphrase associated with the private key/certificate. All information will be saved in AES-256 encrypted format.
3. Click **Next**. The **Add Connector Instance: Configuration** form will display.
4. Enter the repository specific information:
   - **Authentication URL**: URL endpoint for authentication
   - **CARA REST URL**: This host or base URL for making all REST API calls
   - **Application URL**: This URL will be used to redirecting user to the document in the repository
   - **Repository Name**: Name of the target repository

- **Version Comment Field/Attribute Name**: Repository attribute name to use for populating check-in comments. If specified, it will include additional information for each check-in performed.



5. Click **Save**. The system will attempt to connect to the repository and validate the parameters provided. If unsuccessful, an error message will display. If successful, the configuration will be saved.

12.1.3 Create Connector Profiles for a Business Object Class

Once the connector instance is created, the next step is to configure profiles for business object classes that require a repository connection. Profiles allow for document type or taxonomy mapping, as well as metadata mapping between the two systems.

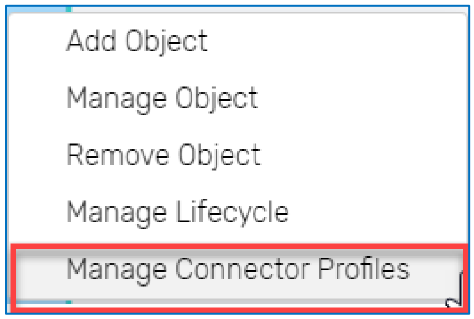
It is possible to create more than one profile per business object class. Profiles can be manual wherein authorized users are required to manually transfer/save documents to the repository, or they can be automatic wherein *InteliNotion* will transfer/save documents when a specified event occurs.

For automatic profiles, if the user creates more than one profile, a profile selection rule or criteria determine which profile should be selected based on the document metadata. For example, it is possible to create three profiles for a Clinical Document business object class, one per document type (eg, Protocol, SAP, CSR), each requiring its own classification and metadata in the repository.

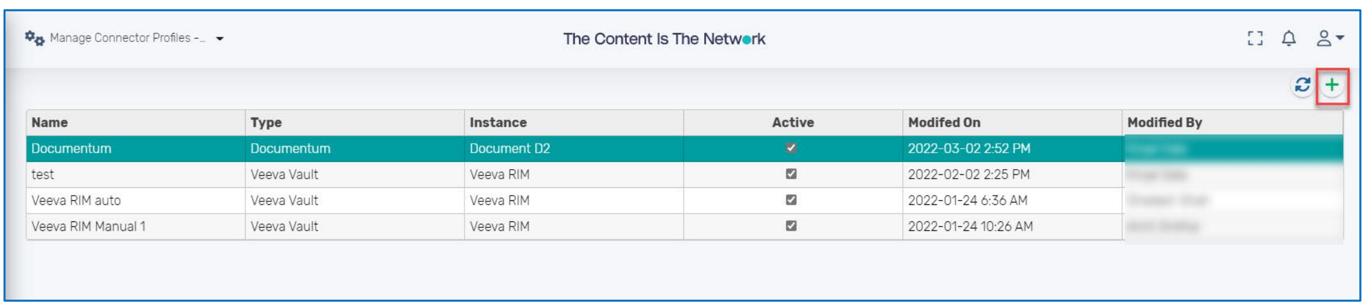
Refer to the steps below for general instructions for configuring a connector profile for a BO.

Note: The steps to create a business object connector profile to a specific repository are covered in Sections 12.1.2.1 - Section 12.1.2.4.

1. Hover over **Settings** in the left navigation pane and click on **Business Objects**.
2. Right click on any business object and the **Business Object Modeler** page will open.
3. Navigate to a business object and right click on the applicable BO. The submenu will display.
4. Click on **Manage Connector Profiles**. A list of existing profiles will display.

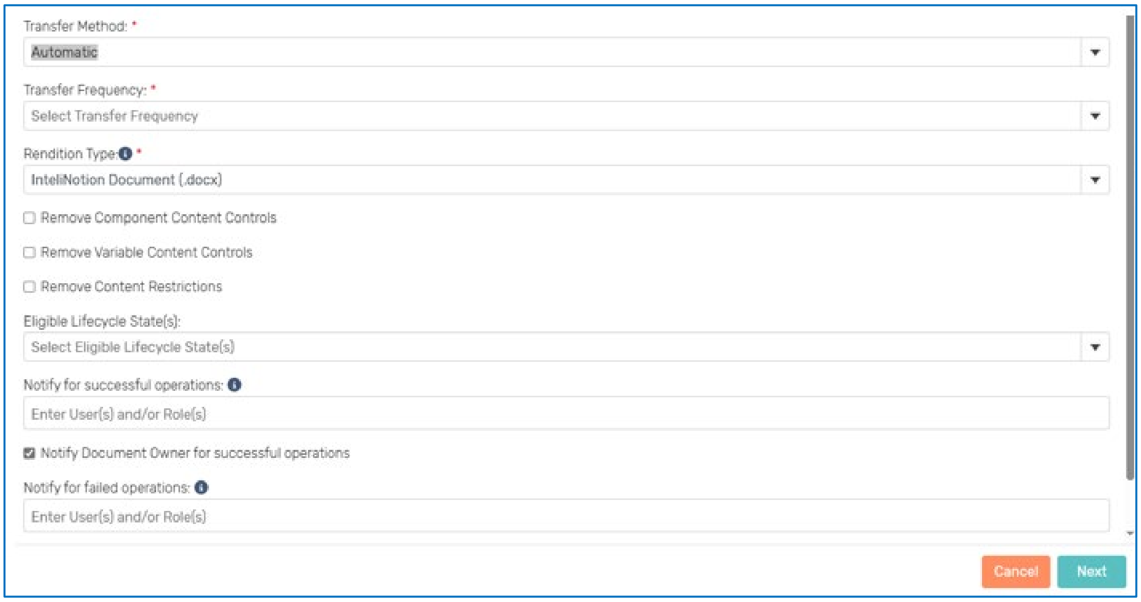


5. Click on the  icon on the **Manage External Connector** page to add a new profile.



6. The **Add Connector Profile: Business Rules** page will display.

Note: This page display is dynamic, and some items will be hidden based on prior selections. The following screen is included as an example, but the list below describes all items.



- **Name** – Unique name for the profile for the selected business object class.
- **Connector Instance** – Lists available connector instances to use for the profile.
- **Transfer Method** – Transfer method can be **automatic** or **manual**. Automatic transfer will not be available if the authentication method for connector instance is set to prompt users for their credentials.
- **Transfer Frequency** - Determines when and how frequently documents will be saved to repository. The available options are **Lifecycle State**, and **Check-in**. If multiple options are selected, documents will be transferred for each of the selected events (applicable only for automatic transfers).

  Note: A check-in event in *InteliNotion* will trigger a save to external repository action if this option is selected. The save to repository action will also take place whenever a **Finish Coauthoring** event occurs.

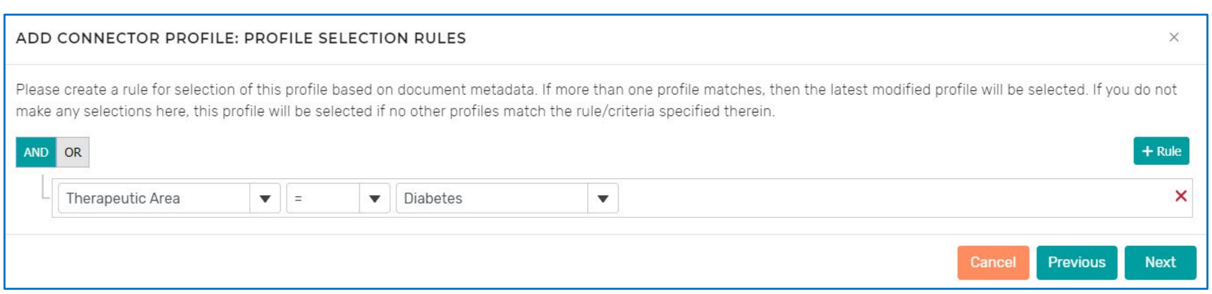
- **Rendition Type** (**and related settings to specify content control processing behavior**) – Configures which file type is saved in the target repository. Documents can be saved as is in InteliNotion format or can be converted to various other formats such as .doc, .pdf or .docx with or without content controls. For the complete list of options and associated settings that define the content controls behavior of the transferred documents, see **InteliNotion User Guide Module 11, Section 2**.

- **Eligible Lifecycle States** - One or more lifecycle state(s) associated with the object class in which the document can be sent to repository. This setting will be used both for manual and automated transfers. For manual transfers, the "Save to Repository" options will be available only if the document is the specified states. For automatic transfers, the repository save will be triggered whenever the document enters the specified states.
- **Notifications** -The following optional settings will determine who is notified in the event of successful and failed repository operations (applicable only for automatic transfers).
- **Notification for Successful Operations** – Specifies if the document owner and/or additional users and teams should be notified for successful transfers.
- **Notification for Failed Operations** – The document owner will always be notified of failed transfers. Select additional users and teams for this type of notification.
- **Eligible Versions** – Determines if the **Save to Repository** option should be available for all versions of the document or only for major versions (applicable only for manual transfers).
- **Prompt for Location** - If selected, users will be prompted to navigate and select a target folder (for Documentum) or binder (for Veeva) to save the document in the repository (applicable only for manual transfers).

7. Click **Next.** If the user is creating an **automatic** profile, the **Add Connector Profile: Profile Selection Rules** page will display. For manual profiles, this page will be skipped.

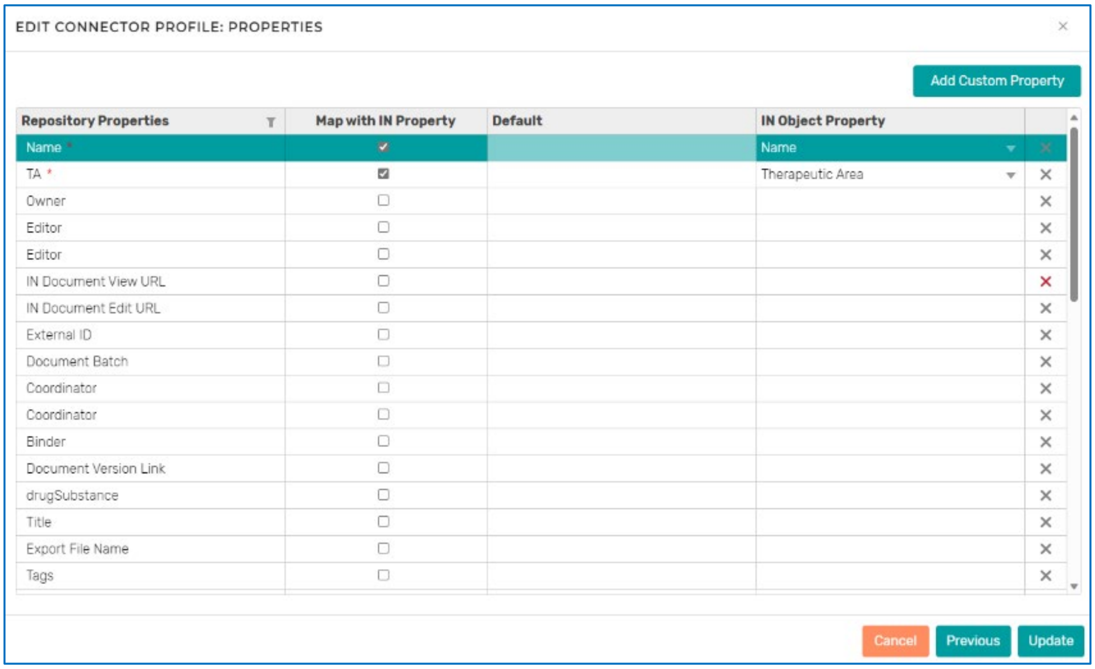
<u>Notes:</u>

- Step 7 is optional and not required if only one automatic profile is created. If multiple automatic profiles are created, a selection criterion must be provided by entering one or more conditions (to match metadata). The profile will be selected if the criteria are evaluated as valid. If multiple profiles match the criteria, the latest modified profile will be used.
- It is possible to create one or more rules by selecting an indexable property for the selected business object class, operator, and value. Eg, "TherapeuticArea = Oncology" or "DocumentType = Protocol".

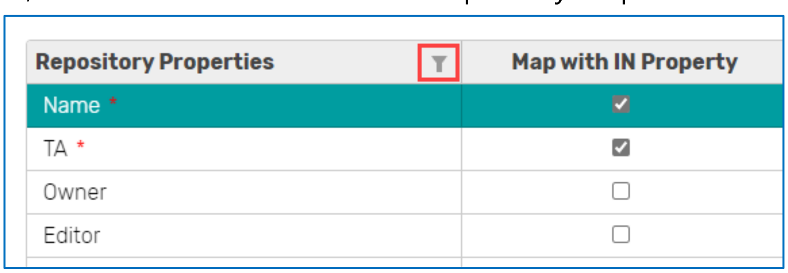


8. Click **Next**. The **Add Connector Profile: Configuration** page will display; follow the steps as applicable for the repository profile as outlined in Sections 12.1.2.1 - Section 12.1.2.4.
9. In the **Add Connector Profile: Properties** form, map the required repository properties with the related business object properties or the default values that can be typed in or be selected in the dropdown values.

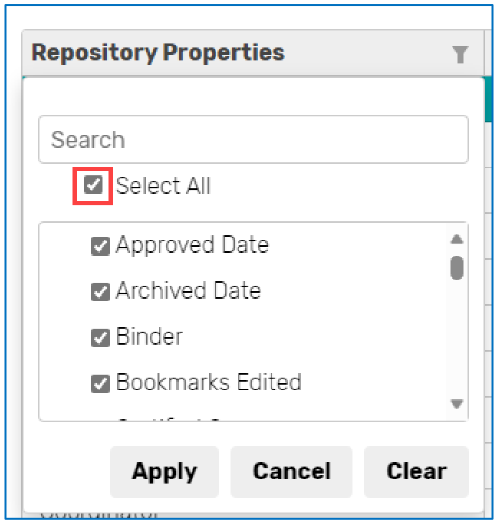
Note: The following screen is included as an example. Contents of this screen will vary depending on the repository type as well as the classification selections made in the previous screen.



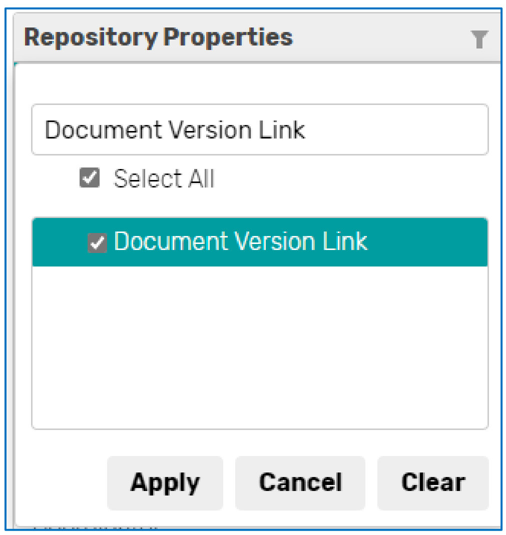
a. To filter the available properties displayed on the **Edit Connector Profile: Properties** window, click the filter icon next to Repository Properties.



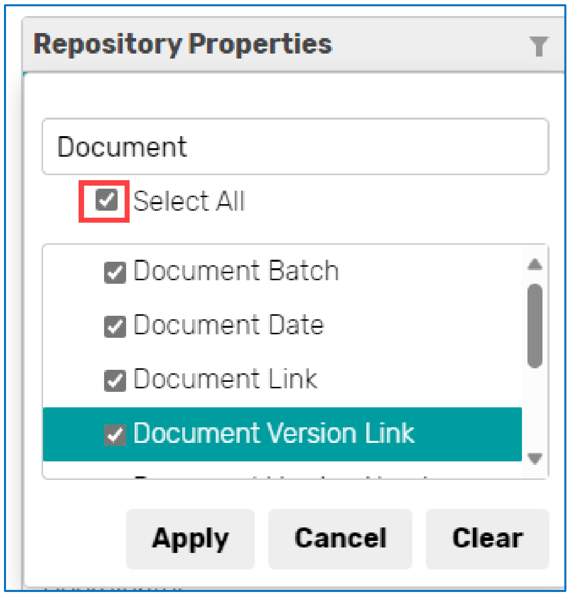
b. In the drop-down menu, unclick the **Select All** checkbox.



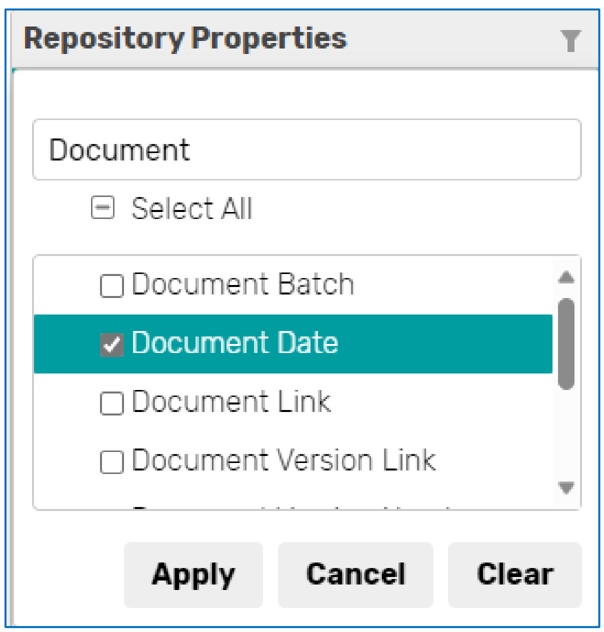
c. In the search bar, type the keyword or exact name match to find the property to be displayed.



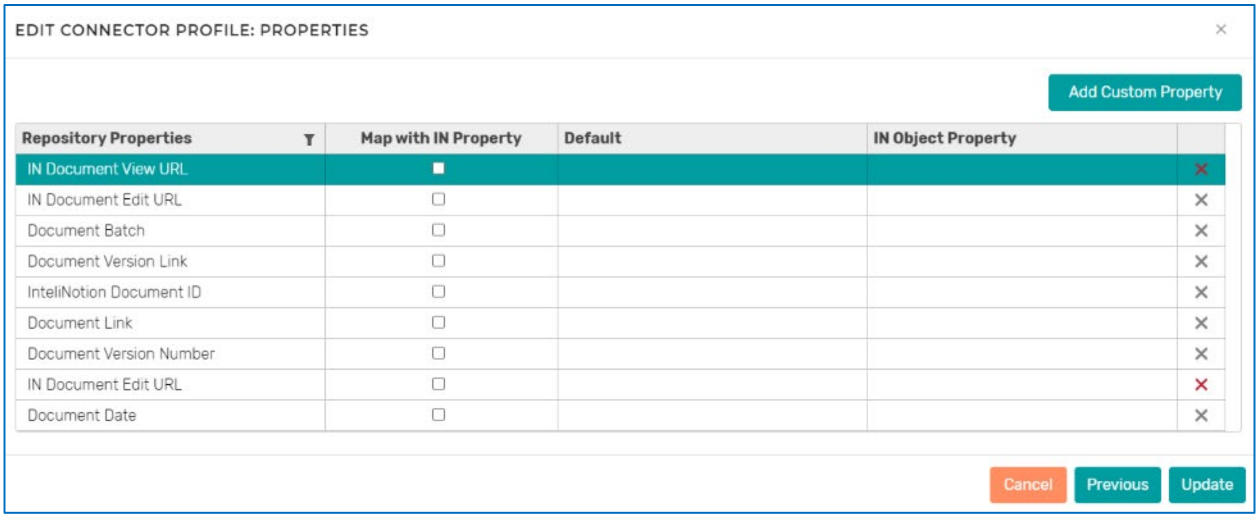
i. If necessary, in a keyword search, uncheck the **Select All** checkbox, and check only the properties to be displayed.



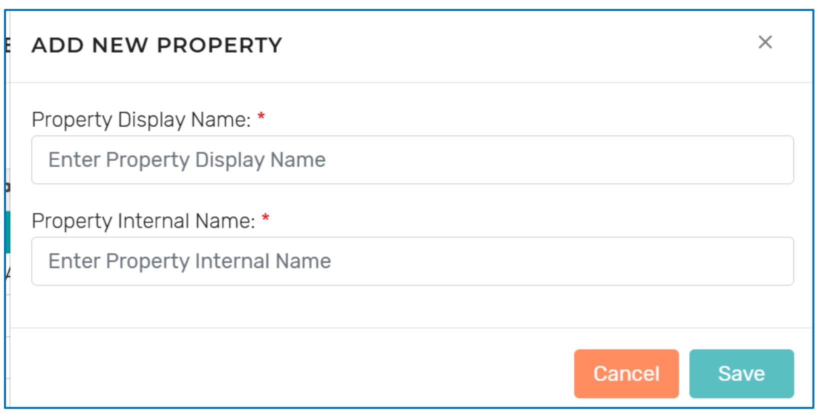
ii. Select the searched properties to be displayed.



d. The filtered properties will be displayed on the **Edit Connector Profile: Properties** window.



10. In the Property Mapping screen, it is possible to add one or more custom property mappings. This option is useful in the event a hidden repository property needs to be populated by *InteliNotion*. On clicking the **Add Custom Property**, **Add New Property** form will display.

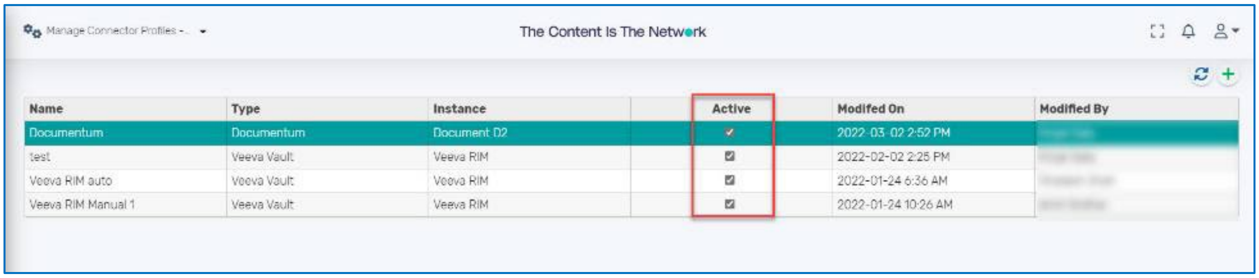


- **Property Display Name**: The property label which will be displayed in the Metadata mapping form
- **Property Internal Name**: The internal name for the property in the repository that will be queried for and populated.

11. Click **Save**. The new property created is displayed at the end of the Metadata mapping list. The user can then update the mapping for this new property.

<u>Note:</u> If one or more required repository properties are not mapped, the form will not save.

12. After a successful save, enable the profile and make it available for use by checking the Active box in the list of profiles. The profile must be activated for the document transfer to happen.



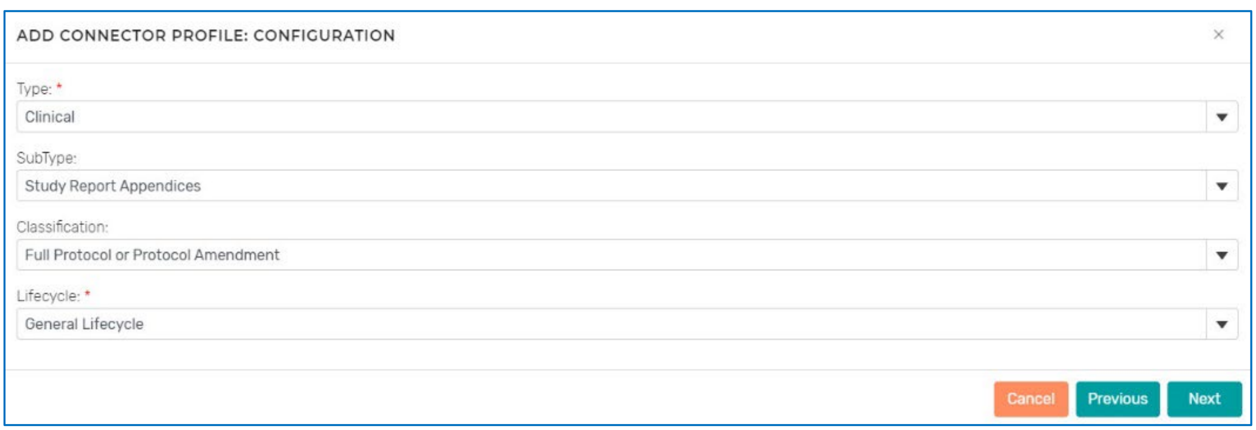
12.1.3.1 Configure Veeva-Specific Profile

To complete the profile configuration for Veeva Vault, navigate to the **Add Connector Profile: Configuration** page, and select applicable choices for the following items to classify documents for the current Business Object Class in Veeva Vault.

Note: This screen retrieves the classification values from Veeva Vault as selections are made.

- **Type** – List of all available types in the selected Veeva Vault
- **Subtype** - List of available subtypes will refresh to show the list for the selected Type
- **Classification** - List of available classifications for the selected **Type** and **Subtype**
- **Lifecyle** - List of available lifecycles for the selected **Type**

  Note: **Type** and **Lifecycle** fields are mandatory. It is possible for **Subtype** and **Classification** fields to be mandatory in Veeva depending on the **Type** value despite not being marked as such on this screen.



12.1.3.2 Configure Documentum D2-Specific Profile

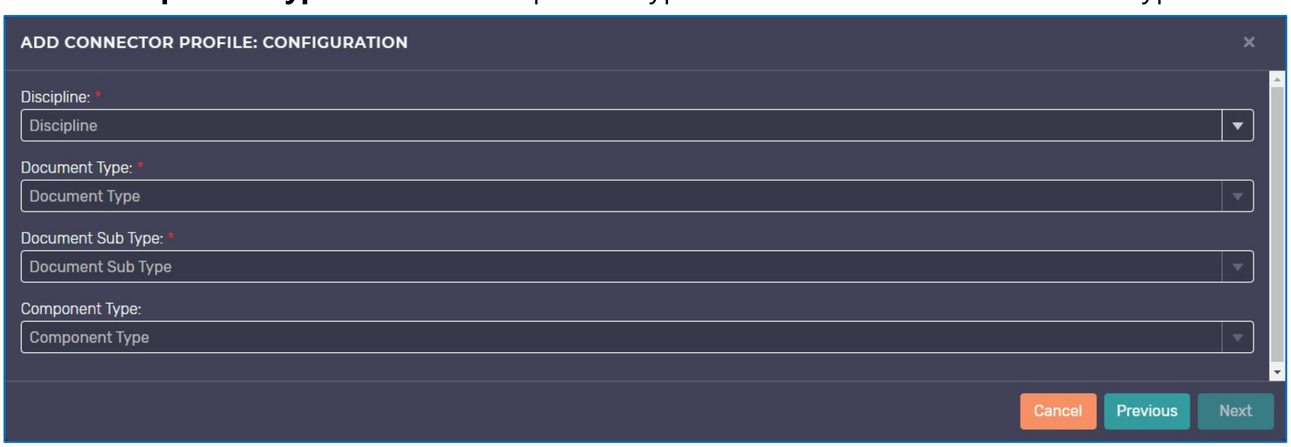
To classify documents for Documentum D2, navigate to the **Add Connector Profile: Configuration** page and select applicable choices for the following items to classify documents for the current Business Object Class in Documentum D2.

- **Creation Profile** – List of all available creation profiles in Documentum D2
- **Document Type** – List of document types

12.1.3.3 Configure CARA (with Axway proxy) specific Profile

To classify documents for CARA with Axway proxy, navigate to the **Add Connector Profile: Configuration** page, and select applicable choices for the following items to classify documents for the current Business Object Class in CARA repository.

- **Discipline**: List of all available Discipline values
- **Document Type**: List of all Document Types for the selected Discipline
- **Document Sub Type**: List of all Document Sub Type for the selected Document Type
- **Component Type**: List of all Component Types for the selected Document Sub Type



12.1.3.4 Configure CARA (with MuleSoft proxy) specific Profile

To classify documents for CARA with Axway proxy, navigate to the **Add Connector Profile: Configuration** page, and select applicable choices for the following items to classify documents for the current Business Object Class in CARA repository.

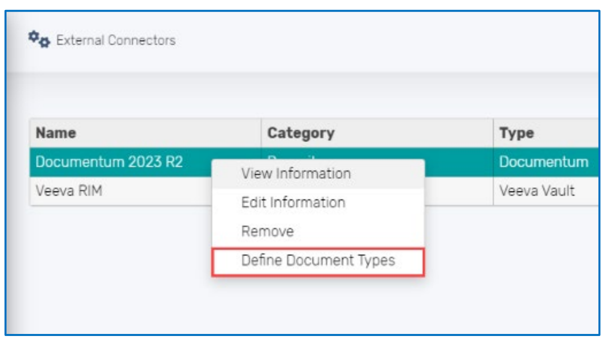
- Document Group: List of all Document Groups

12.1.3.5 Defining Document Types for a Connector Profile

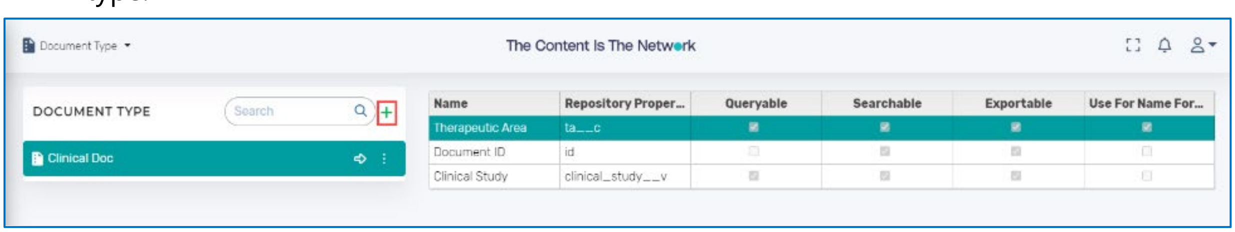
Once the repository specific connector profiles are configured, if desired, the document types allowed for that connector profile can be configured. Document Types are required only if you plan to use Dossier functionality. They are not required for transferring documents to repositories when authoring is completed. Follow the steps listed below to configure document types.

Note: Document Type configuration is applicable only to Dossier functionality and is not required for transferring documents to repositories.

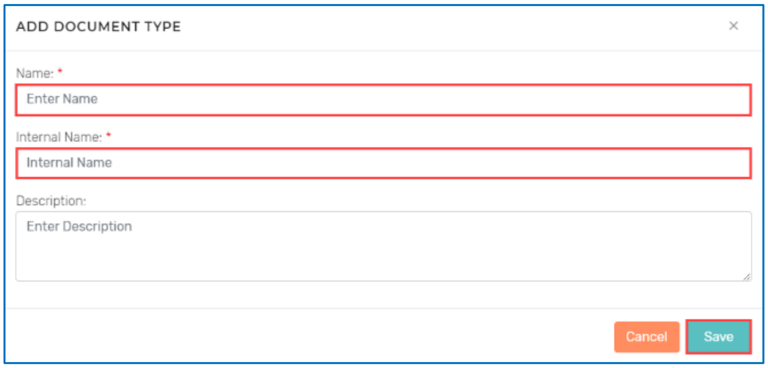
1. In the Navigator, hover over **Settings** and click on **External Connectors**.
2. On the external connectors page, right click on the connector profile to be configured, and click **Define Document Types**.



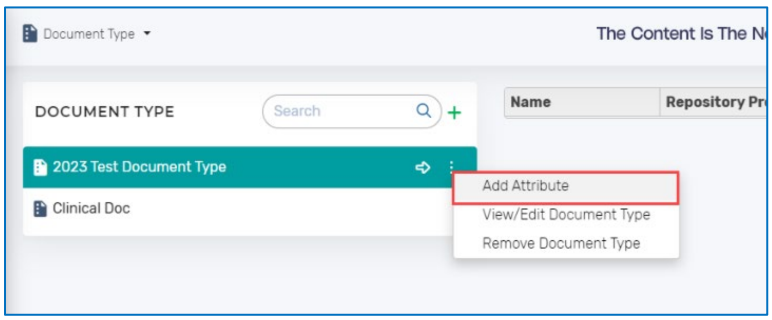
3. The **Document Type** screen will display. Click the **green plus** + **icon** to add a document type.



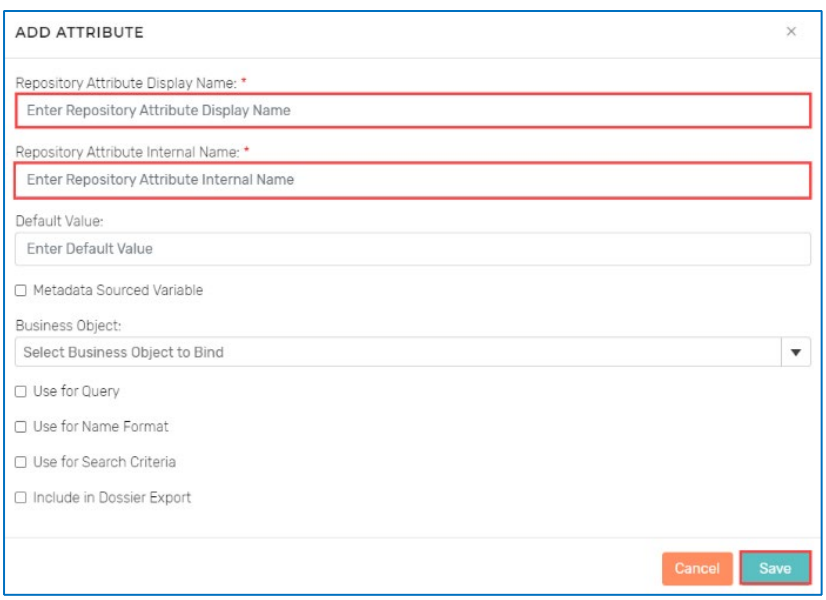
4. The **Add Document Type** form will display. Fill out the **Name** and **Internal Name** fields and click **Save**.



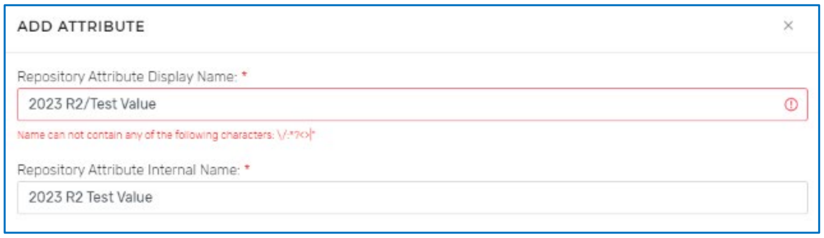
5. The new document type will appear in the **Document Type** screen. Click the ellipses next to the document type and choose **Add Attribute**.



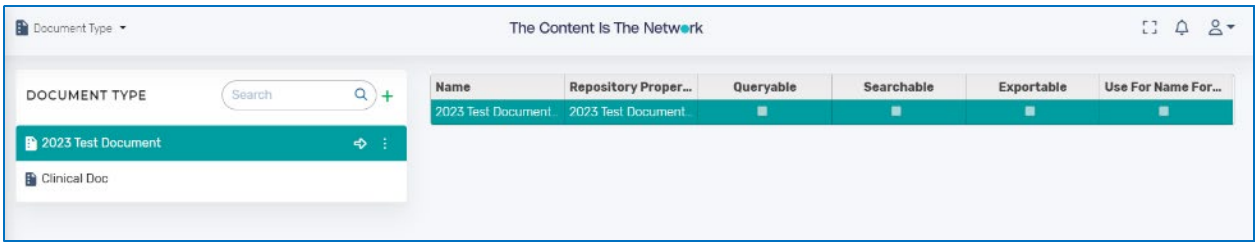
6. The **Add Attribute** form will display. Fill out the required fields (denoted with a *) along with any other desired fields and click **Save**.



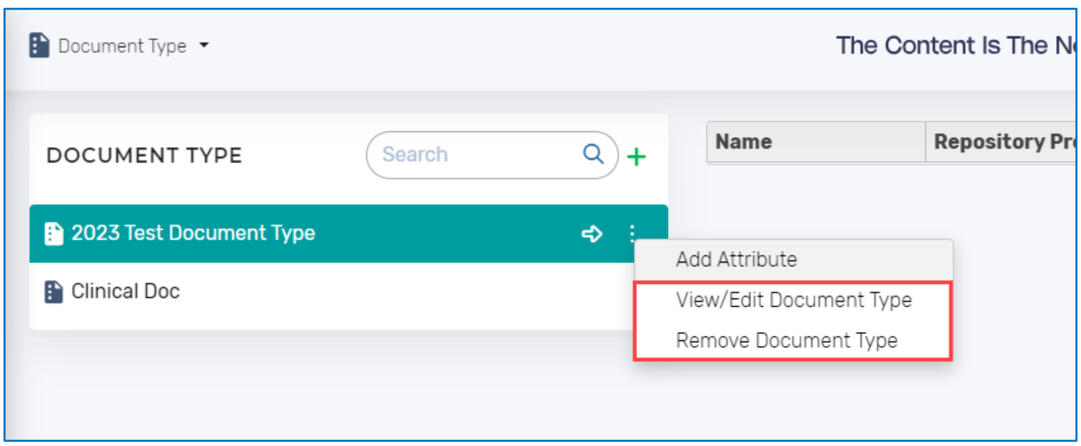
Note: Names cannot contain the special characters \/:*?<>|"



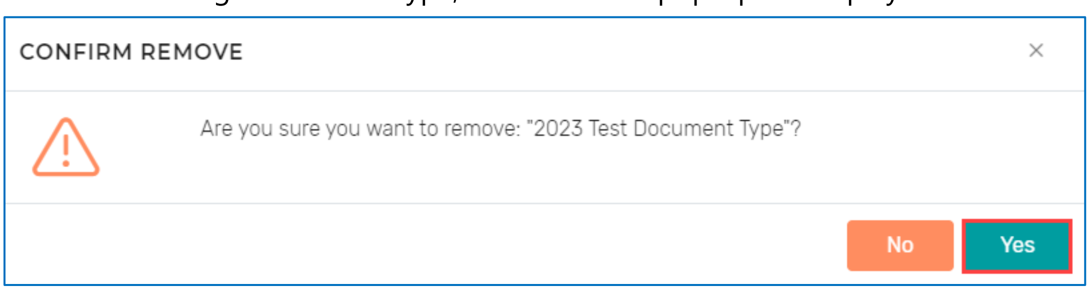
7. The new attribute will be displayed on the **Document Type** screen.



8. To edit or remove the document type, right click, and choose **View/Edit Document Type** or **Remove Document Type** as applicable.



9. When removing a document type, a confirmation pop-up will display. Click **Yes** to remove.



12.1.4 Synchronizing InteliNotion Document Status from Veeva Repository

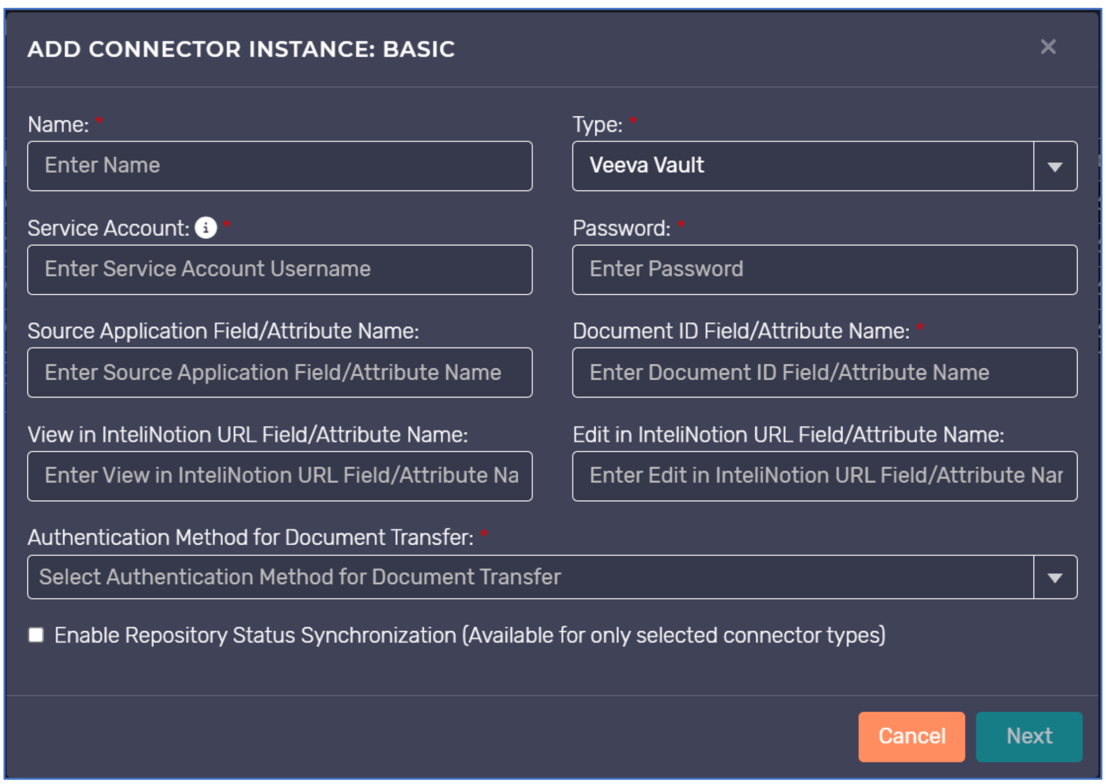
The repository connector functionality optionally allows for synchronizing/updating the lifecycle status in InteliNotion whenever it changes in the repository after the document is transferred to the Repository. This functionality is limited to *Veeva* Vault.

For this feature to work, some dedicated fields and lifecycle configurations are required in *Veeva Vault*. These configurations are described throughout this section. Additionally, a timer job needs to be enabled *InteliNotion* to periodically poll *Veeva* Vault and look for documents whose lifecycle states have changed and process them appropriately in *InteliNotion*. Refer to Section 13.6 for more details.

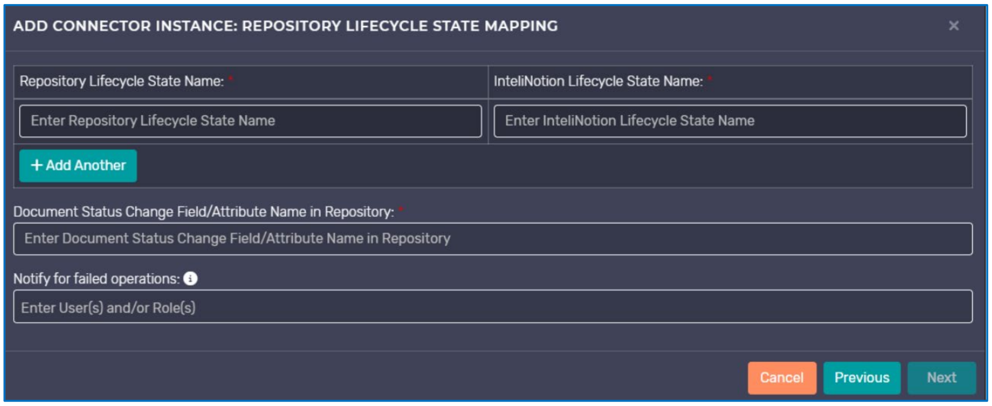
Any Full Control Administrator or a user with external connector functional permission can configure this functionality for an existing Veeva connector as described below.

1. In the Navigator, click **Settings** and then **External Connectors**.
2. On the external connectors page, right click on any **Veeva Vault** connector instance and select **Edit Information**

   Note: This functionality is only available for Veeva Connectors.
3. Edit Connector Instance page is displayed.
4. Select the checkbox for **Enable Repository Status Synchronization** and click **Next.**



5. The **Edit External Connector: Repository Lifecycle State Mapping** page displays. On this page, you will need to map one or more Veeva lifecycle states to InteliNotion lifecycle states up to 10 entries. This screen does not validate state names. All validations are performed at run time when processing the state changes reported by Veeva. Fill out the form as described below.



- **Repository Lifecycle State Name:** The display name of lifecycle state in Veeva Vault to be processed in InteliNotion. For example, Reviewed, Approved, Obsolete
- **InteliNotion Lifecycle State Name:** The display name of InteliNotion lifecycle state to which the document should be promoted when the specified state change occurs in Veeva Vault. For example, Transferred, Approved in RIM, Obsolete.
- **Document Status Change Field/Attribute Name in Repository:** A dedicated field for InteliNotion to use and check for documents that have been promoted to eligible states. This field is required and must be populated by Veeva (as part of lifecycle state entry action) every time a document enters the designated lifecycle state.
- **Notify for Failed Operations:** One or more users and teams that should be notified via email if the processing fails for one or more documents.

Note: User can Edit the Email Notification template for Error Notifications (see Application Admin Guide, Section 5)

6. Click **Next** and continue updating other fields and then save changes.
7. If it hasn't been already, enable/configure timer job to start polling Veeva for document lifecycle state changes for documents authored in InteliNotion. See Section 13.6 for details.
8. The timer job will run on the specified schedule and processes if any documents are found since the last successful run. Each job run will create a report with the listing of documents that were processed along with the outcome.

9. Some documents may fail processing. The following are a few such scenarios some of which are uncommon or due to configuration errors:
   - The specified *InteliNotion* Lifecycle State does not exist for the document's business object class.
   - The specified *InteliNotion* Lifecycle State is not valid for the current lifecycle state of the document.
   - The document or its editable components lifecycle state update fail for any reason (e.g., document and/or components are checked out).
   - The document status change updates cannot be retrieved from *Veeva* for any reason.

12.2 COLLABORATIVE REVIEW CONNECTOR

InteliNotion provides the capability to integrate with collaborative review tools such as *IdeaGen*'s PleaseReview. This integration allows users to send the document directly from InteliNotion to the review tool and then bring it back into the system once the review is completed.

This section describes configuration steps for *IdeaGen* PleaseReview connector.

For an end user to be able to send documents to PleaseReview, an InteliNotion admin must configure the PleaseReview connector to provide the connectivity and configuration information. The admin must work with the PleaseReview application owner in the client's organization to configure and collect the required information described below.

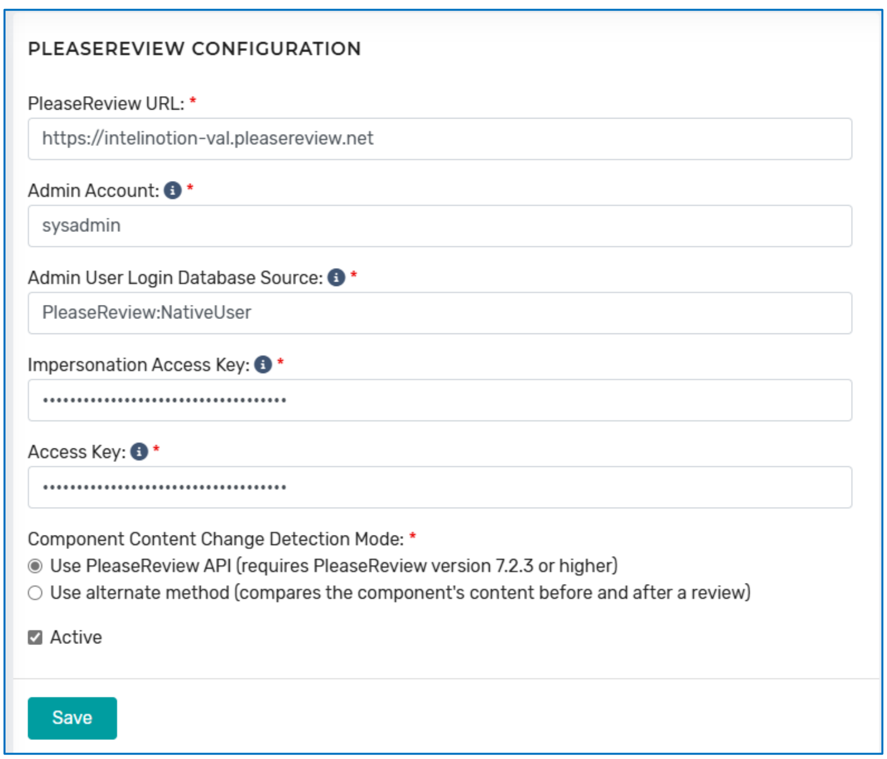
The following steps describe various parameters and how to configure them.

For an end user to be able to send documents to *PleaseReview*, an *InteliNotion* admin must configure the PleaseReview connector to provide the connectivity and configuration information. The admin must work with the PleaseReview application owner in the client's organization to configure and collect the required information described below.

The following steps describe various parameters and how to configure them.

1. In the left-hand navigation pane of the *Web Console*, click on **Settings**, then click **Collaborative Review**.
2. The **Collaborative Review** page will display. Fill in the fields listed below for the *PleaseReview* configuration.
   - **PleaseReview URL**: PleaseReview application URL. Typically, each InteliNotion environment (eg, DEV) is paired with its PleaseReview counterpart.
   - **Admin Account**: This must be populated as sysadmin.
   - **Admin User Login Database Source**: This must be populated as PleaseReview:NativeUser.

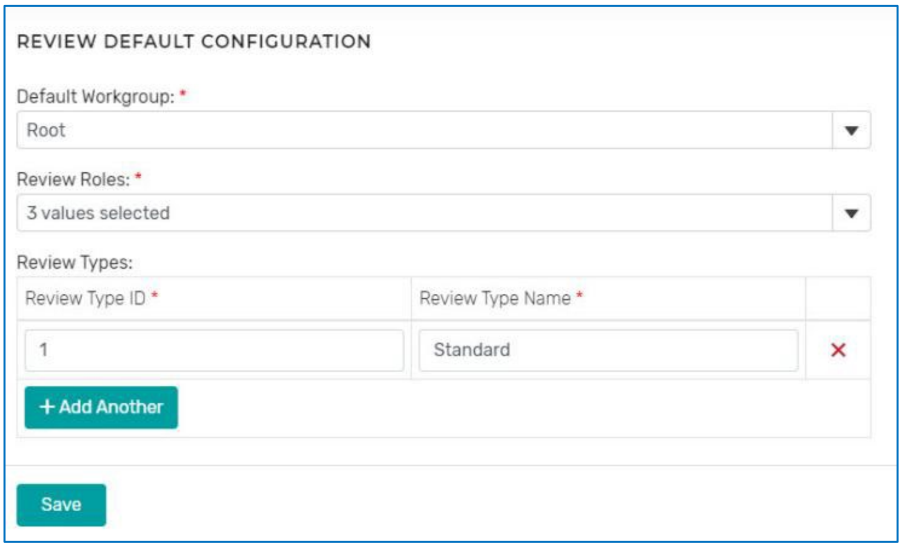
- **Impersonation Access Key**: Trusted client key for the *TaraWS3* web service received from the PleaseReview application team in your organization.
- **Access Key**: Trusted client key for the *TaraWS* web service received from the PleaseReview application team in your organization.
- **Component Content Change Detection Mode**: Method used to evaluate if a component was changed during the review cycle. This determination is then used by Component Status Report notifications as well as up-versioning of the component (if this setting is enabled).
  - **Use PleaseReview API (requires PleaseReview version 7.2.3 or higher)**: InteliNotion will use PleaseReview API to determine which components were modified in PleaseReview. This is the preferred option.
  - **Use alternate method (compares the component's content before and after a review)**: Use this option only if you're not using a supported PleaseReview version. This option will cause the connector to use before and after content comparison logic to determine which components were modified in PleaseReview. This comparison method consumes more processing time and is less accurate than the API method.
- **Active**: Enables or disables the PleaseReview connector. If disabled, users will not see Collaborative Review menu.



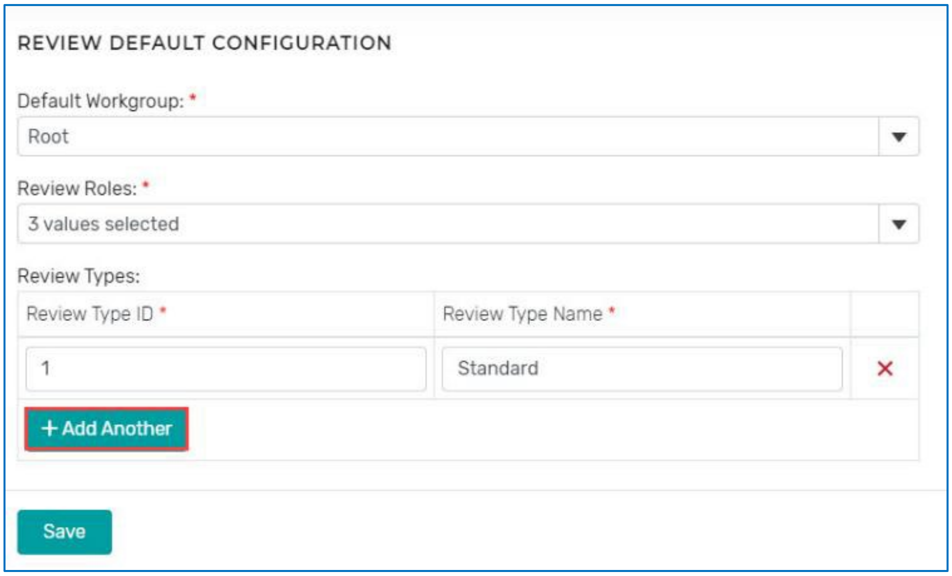
3. Click **Save** to save the changes before configuring other items.

Note: Saving this form will clear out the current selection and reload **Review Default Configuration** in the right pane.

4. Fill in the fields listed below for the **Review Default Configuration**.
   - **Default Work Group**: If the organization's *PleaseReview* configuration contains multiple workgroups, specify which workgroup should be shown as the default for the authors when creating a new review session in InteliNotion.
   - **Review Roles**: *PleaseReview* supports several review roles. The organization will typically only use just a few of them. This selection allows you hide unused roles when creating a new review session in *InteliNotion*.
   - **Review Types**: Due to a known limitation with the *PleaseReview* API, internal **Review Type ID** and the **Review Type Name** for the review types must be configured in *InteliNotion*. The review IDs need to be retrieved from each *PleaseReview* application.



5. If necessary, add additional review types by clicking the **Add Another** button, and filling out the **Review Type ID** and review **Type Name**.



6. Click **Save** to save default review configuration.

13. OTHER FUNCTIONALITIES

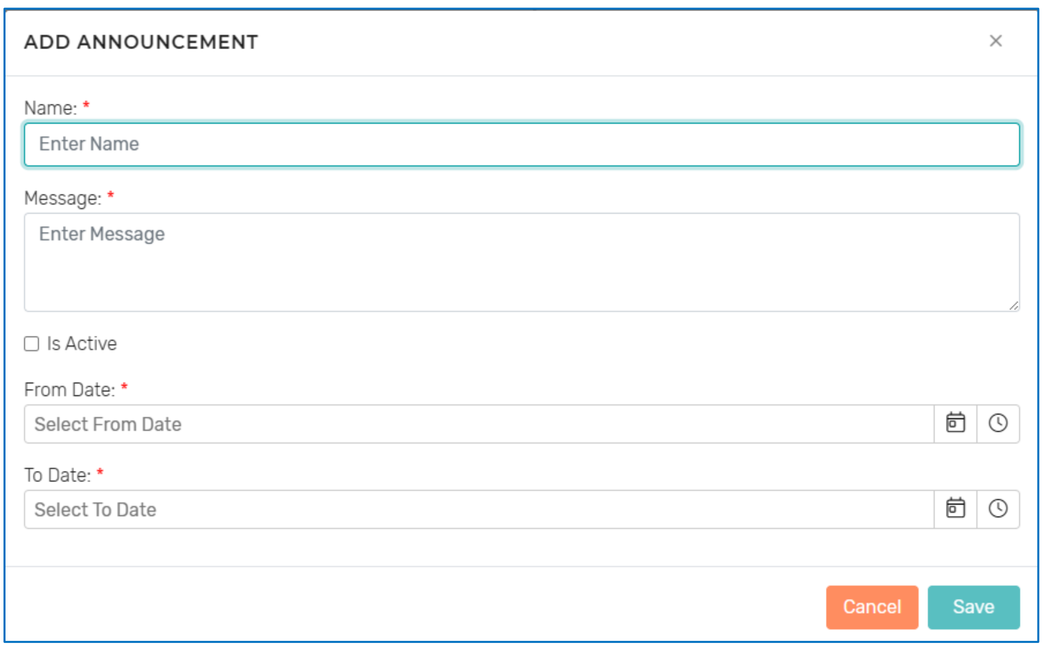
In addition to the features outlined above under the Settings option, there are several other features including **General Application Settings**, **API Keys**, **License**, **Tenant**, and **Database Backup History**. For more information on these features please see the sections below.

13.1 GENERAL APPLICATION SETTINGS

See the sections below for details on general application settings, permissions, and functionalities.

13.1.1 Broadcast Announcements

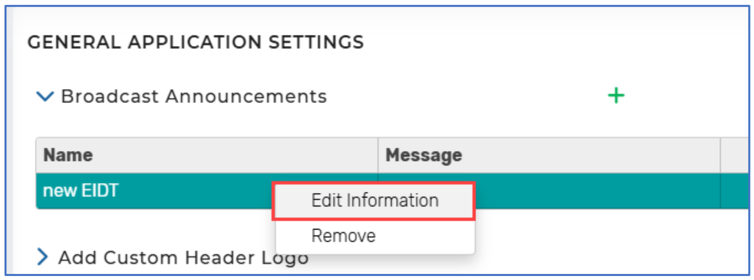
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **General**.
2. The **General Application Settings** page will display.
3. Expand the **Broadcast Announcements** section by clicking on the arrow to the left.
4. Click on the **add icon** + .
5. Enter the **Name**, the **Message** to display, select the checkbox next to **Is Active** if the message should appear immediately, select the dates between which the message should be displayed, and click **Save**.



13.1.1.1 Edit Existing Broadcast Announcements

Follow the steps listed below to edit existing announcements or activate/deactivate them.

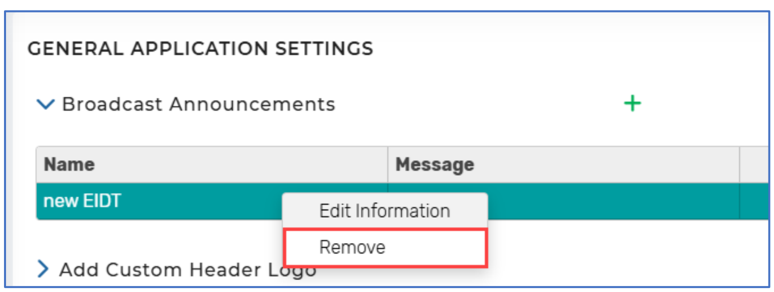
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **General**.
2. The **General Application Settings** page will display.
3. Expand the **Broadcast Announcements** section by clicking on the arrow to the left.
4. Right click on an existing announcement and click **Edit Information**.



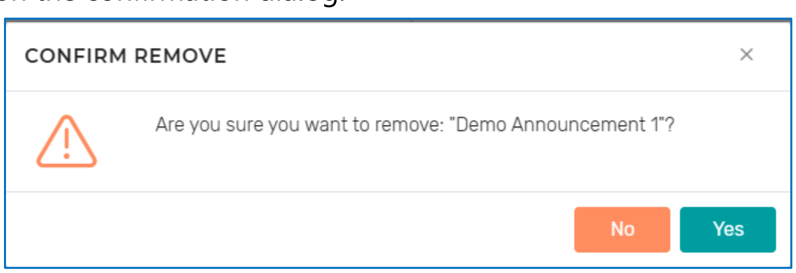
5. Make desired changes and click **Save**.

13.1.1.2 Delete Existing Broadcast Announcements

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **General**.
2. The **General Application Settings** page will display.
3. Expand the **Broadcast Announcements** section by clicking on the arrow to the left.
4. Right click on an existing announcement and click **Remove**.



5. Click **Yes** on the confirmation dialog.

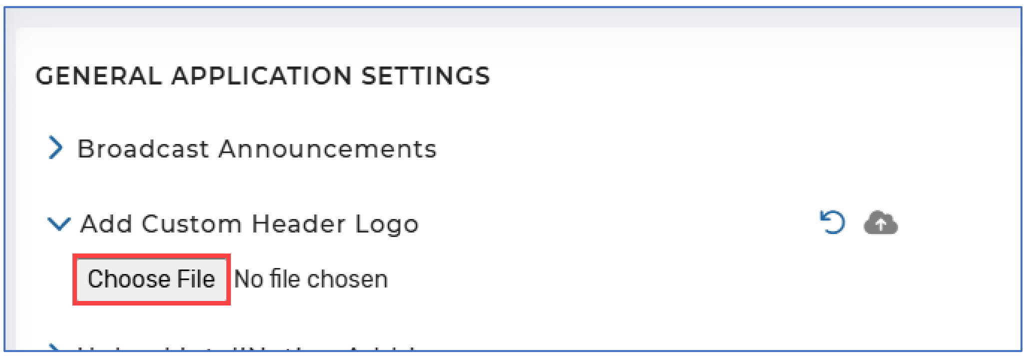


13.1.2 Add Custom Header Logo

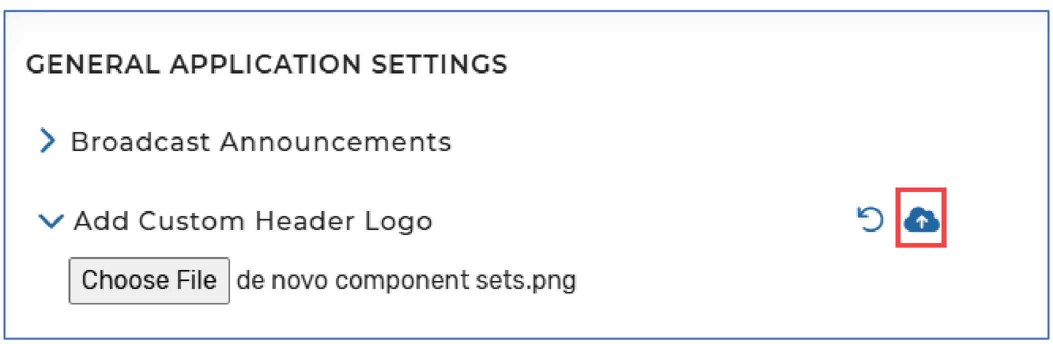
Follow the steps listed in the following sections to replace the standard "The Content Is The Network" logo displayed on top center of the *InteliNotion Web Application* with a custom image eg, a chosen company logo.

13.1.2.1 Upload a New Logo

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **General**.
2. The **General Application Settings** page will display.
3. Expand the **Add Custom Header Logo** section by clicking on the arrow to the left.
4. Click on the **Choose File** button.



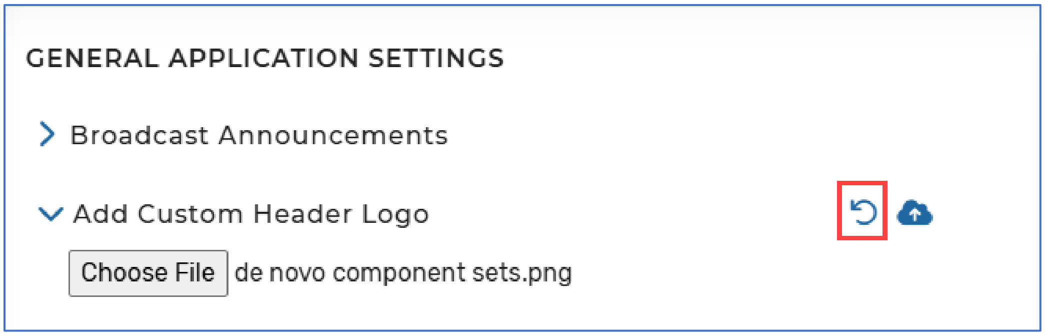
5. Browse to and select an image file, then click the **Open** button. The name of the file will appear next to **Choose File** button.
6. Click the cloud icon to save.



13.1.2.2 Reset Logo

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **General**.
2. The **General Application Settings** page will display.
3. Expand the **Add Custom Header Logo** section by clicking on the arrow to the left.

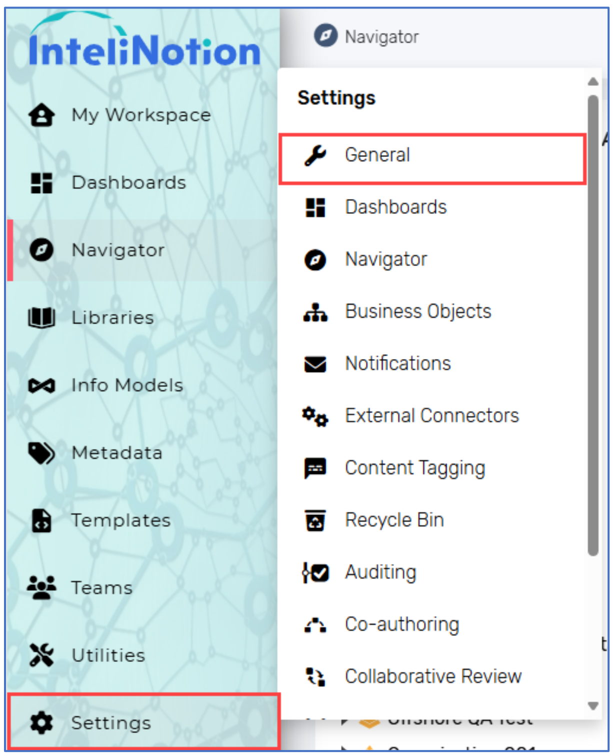
4. Click the **Reset** logo icon.



13.1.3 Uploading InteliNotion Add-In

To upload the *InteliNotion* add-in for usage with the *Word app*, follow the steps listed below.

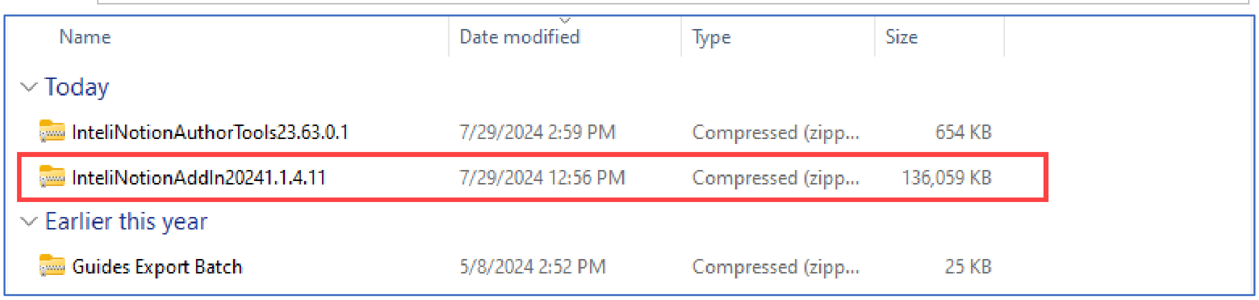
1. In the *InteliNotion Web Console* left hand menu, click on **Settings** and choose **General**.



2. The **General Application Settings** screen will display. Click on the arrow next to **Upload InteliNotion Add-In**.

3. This will bring up the **Choose File** button. Click the button and choose the applicable zip file.

> **<u>Note:</u>** For instructions on downloading the zip file, see the **InteliNotion User Guide, Module 2, Section 2**.



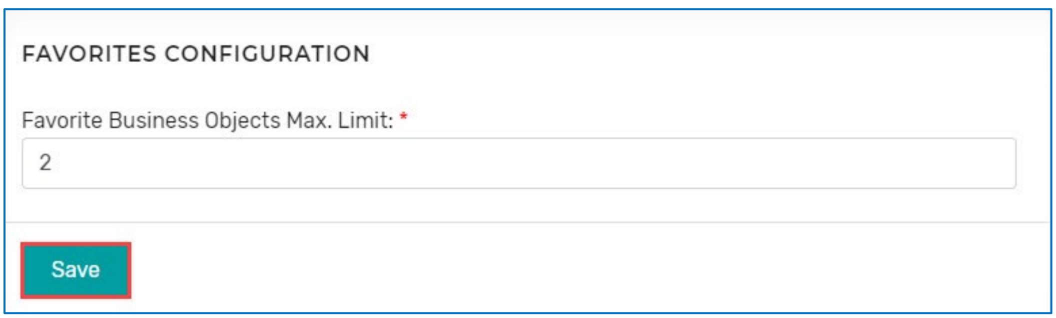
4. Once the file has been uploaded, click the cloud icon to save.

13.1.4 Managing the Limit for Favorite Business Objects

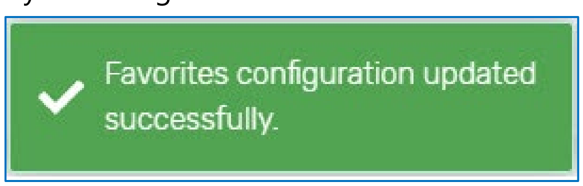
To configure the limit for a user's ability to mark an item as a favorite in the **Navigator**, follow the steps listed below.

<u>Note:</u> The system max limit for favorite items is 50.

1. In the left-hand navigation pane of the *InteliNotion app* console, hover over **Settings**, and in the **Settings** sub-menu, click on **Favorites**.
2. The **Favorites Configuration** form will display. Enter the number of favorite business objects allowable in the favorite **Business Objects Max Limit** field and click **Save**.



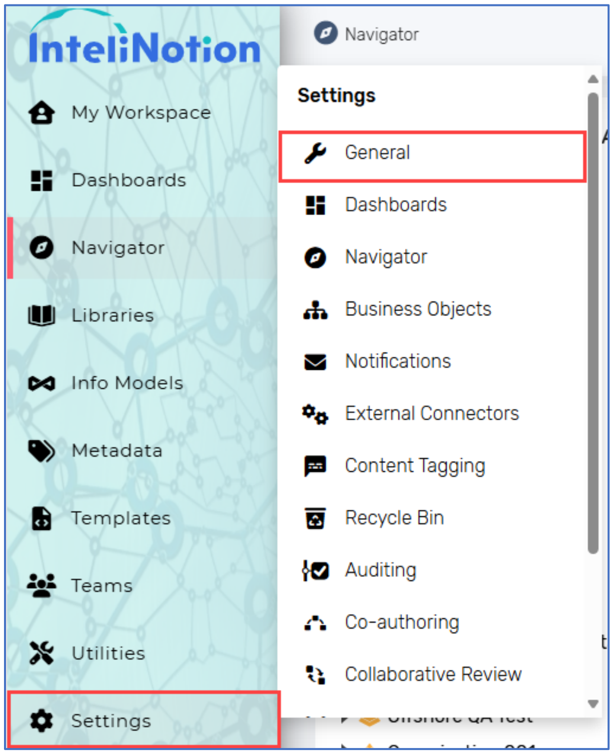
3. A pop-up will display informing the admin that the limit has been updated successfully.



13.1.5 Managing Revisions and Comments Limit

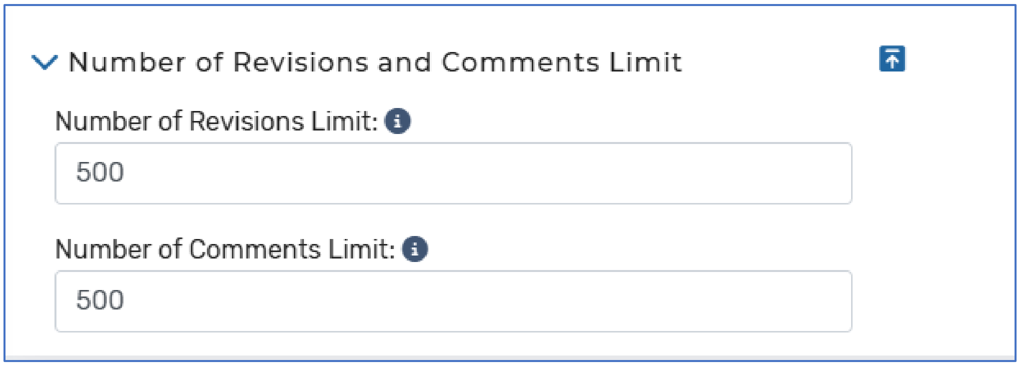
To manage the number of allowable revisions and comments in a document, follow the steps listed below.

1. In the *InteliNotion Web Console* left hand menu, click on **Settings** and choose **General**.



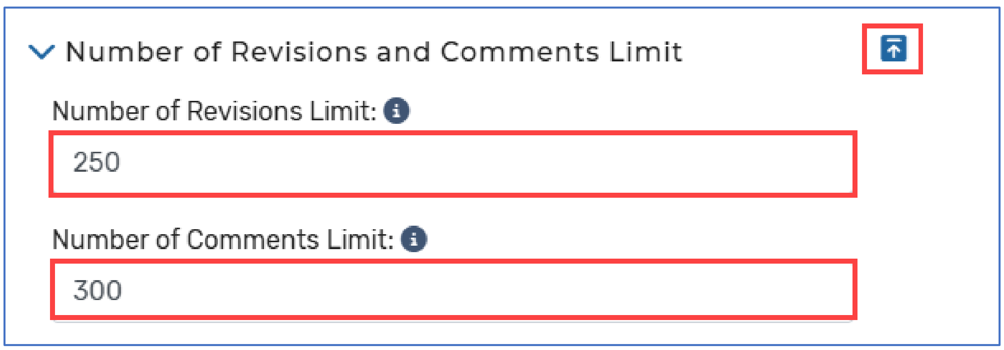
2. The **General Application Settings** screen will display. Click on the arrow next to **Number of Revisions and Comments Limit**.

3. This will bring up the **Number of Revisions Limit** and **Number of Comments Limit** fields.

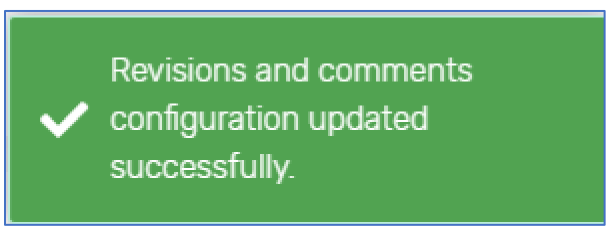


Note: The system default limit for revisions and limits is 500.

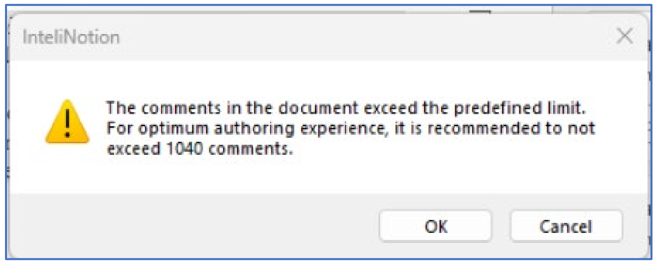
4. Fill in the desired limits for revisions and comments, then click the up arrow to save the configuration change.

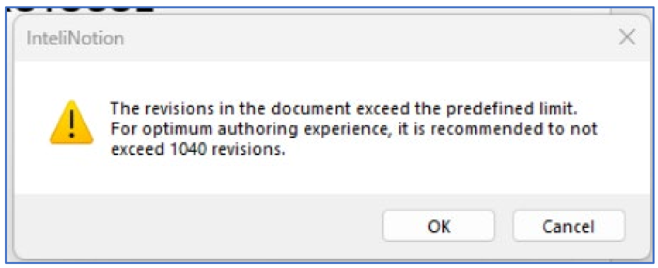


5. A message informing the user that the new limit has been updated successfully will display.



Note: When the configured limit is exceeded, the user will receive a massage similar to one of the following example messages, depending upon the specific limit set by the system administrator.



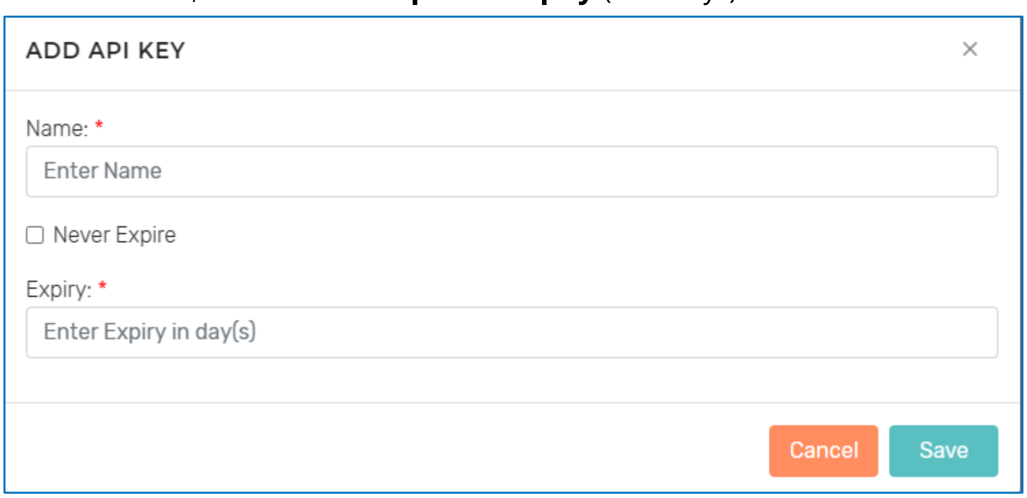


13.2 API KEYS

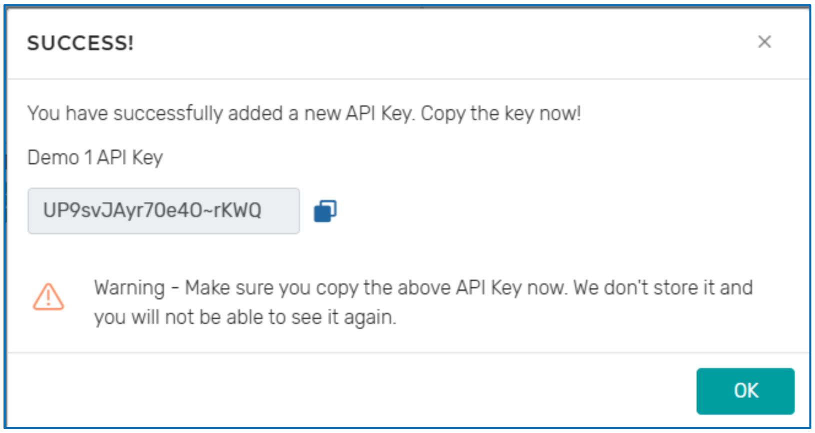
See the sections below for details on API keys.

13.2.1 Add API Key

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **API Keys**.
2. Click on the **add icon** + .
3. Enter the **Name**, select **Never Expire** or **Expiry** (# of days) and click **Save**.



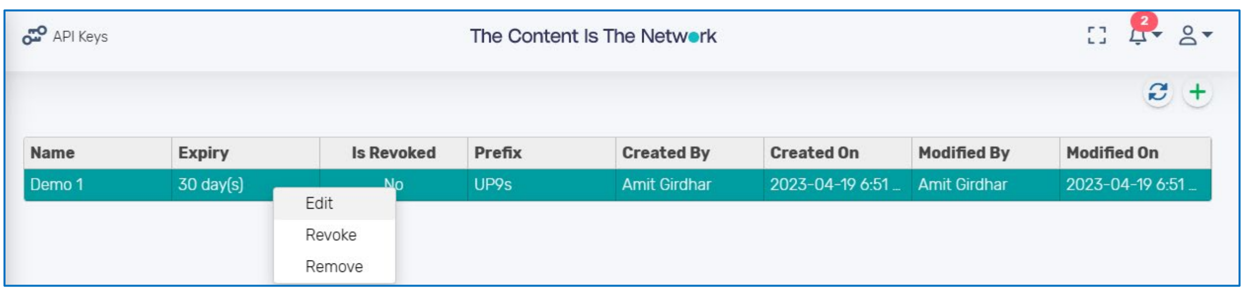
4. Success message will be displayed along with the **API Key**.
5. Click the copy icon to copy the key to clipboard. The key can be pasted into an email message or a document for dissemination.



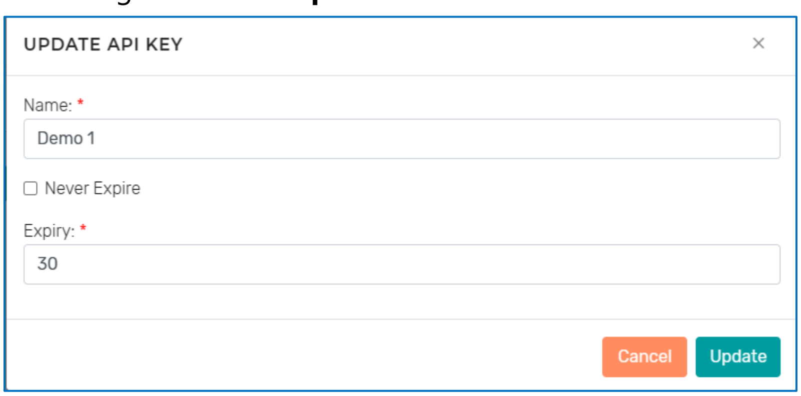
6. Click **OK**.

13.2.2 Edit Existing API Key

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **API Keys**.
2. Right click on an existing API Key and select **Edit**.

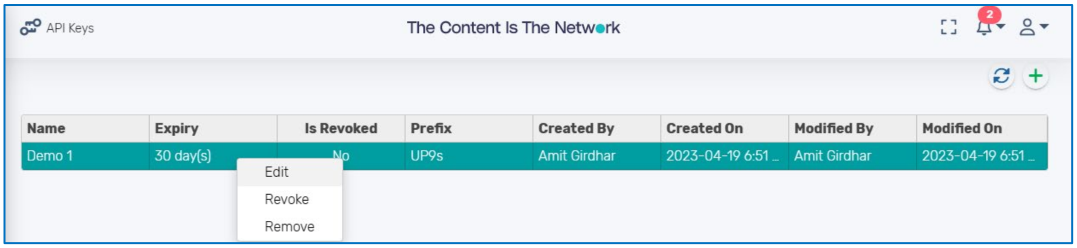


3. Make desired changes and click **Update**.

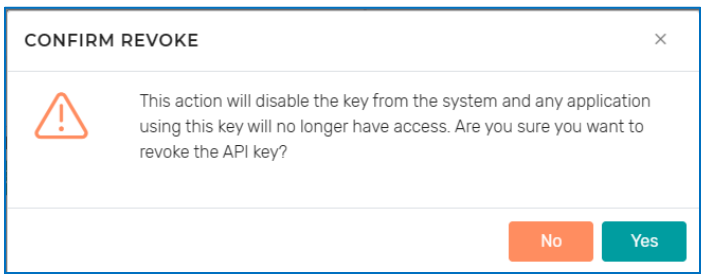


13.2.3 Revoke Existing API Key

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **API Keys**.
2. Right click on an existing **API Key** and select **Revoke**.

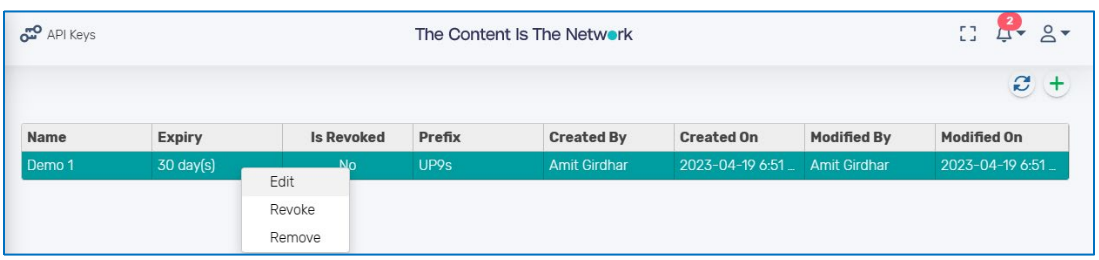


3. Click **Yes** on the confirmation dialog.

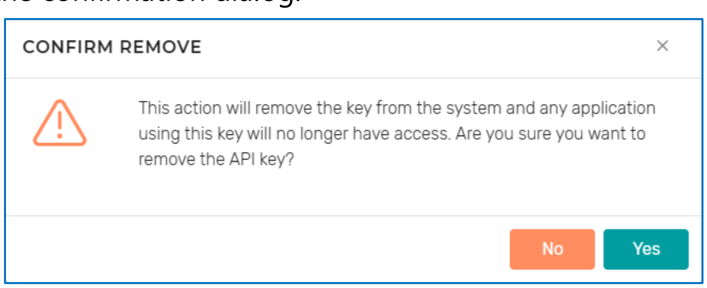


13.2.4 Remove Existing API Key

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **API Keys**.
2. Right click on an existing **API Key** and click **Remove**.



3. Click **Yes** on the confirmation dialog.

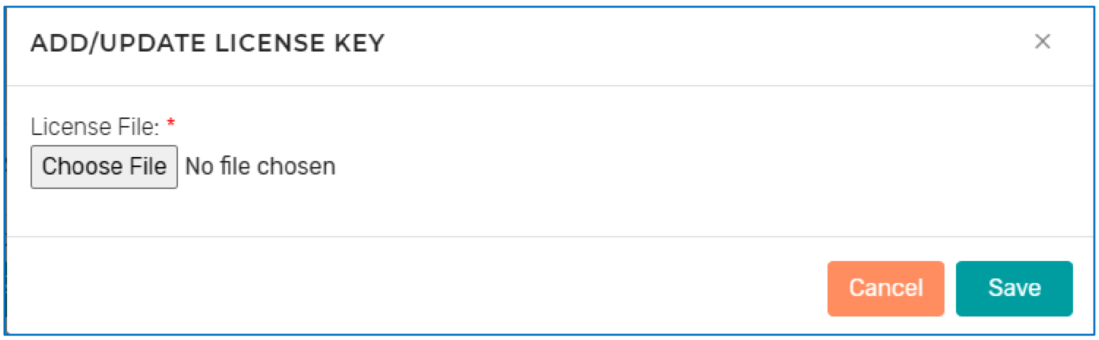


13.3 LICENSE

See the sections below for details on licensing.

13.3.1 Upload InteliNotion License

1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **License**.
2. Click on the **add icon** + .
3. Click on the **Choose File** button.

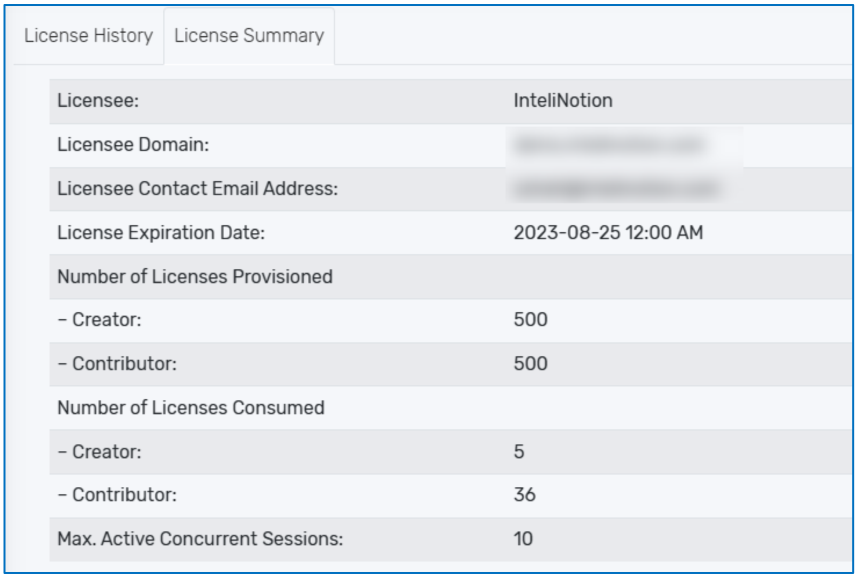


4. Browse to a license file provided by *InteliNotion*, select it, and click the **Open** button. The name of the file will appear next to **Choose File** button.
5. Click **Save**.

Note: If the license file is not valid, is not created for the specific environment or has license a expiration date in the past you will receive an error message. Please request an updated license file from InteliNotion.

13.3.2 Review License Summary

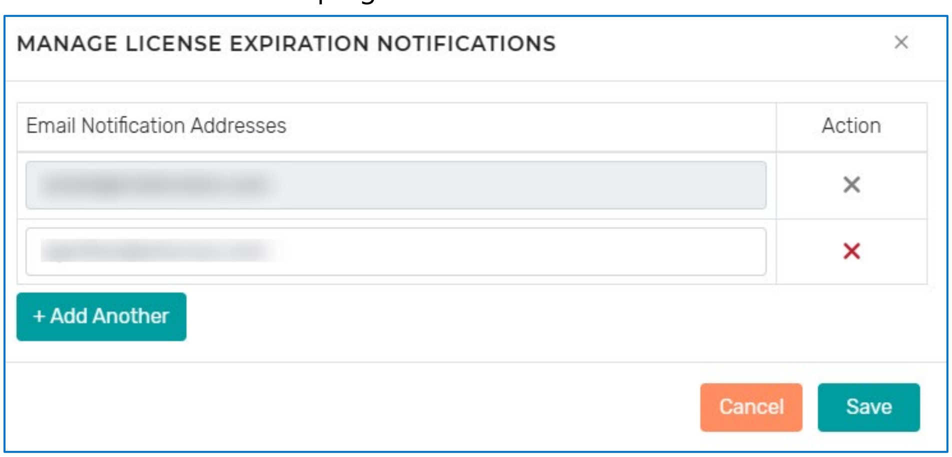
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **License**.
2. Click on the **License Summary** tab to view the information for the latest license.



13.3.3 Manage License Expiration Notifications

When the license is about to expire the system sends out emails to the Licensee Contact and up to nine other email addresses. The additional email addresses can be managed using the **Manage License Expiration Notifications** options.

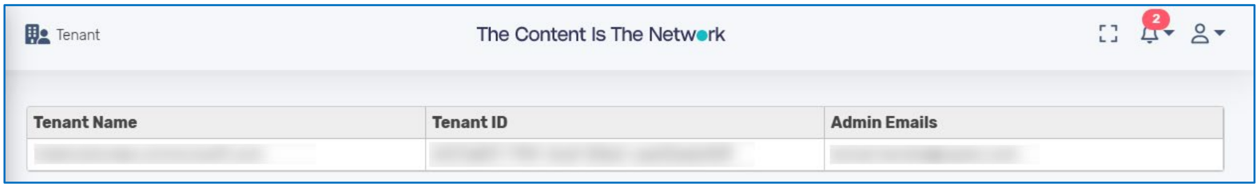
1. In the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **License**.
2. Click on the email icon on top right of the screen.



3. Click on the **Add Another** button to add more email addresses and the **X** icon on the right to remove existing email addresses.
4. Click the **Save** button when done.

13.4 TENANT

To view the Azure tenant information for the *InteliNotion* instance, in the *Web Console*, hover over the **Settings** option in the left-hand navigation pane and click **Tenant**



13.5 DATABASE BACKUP HISTORY

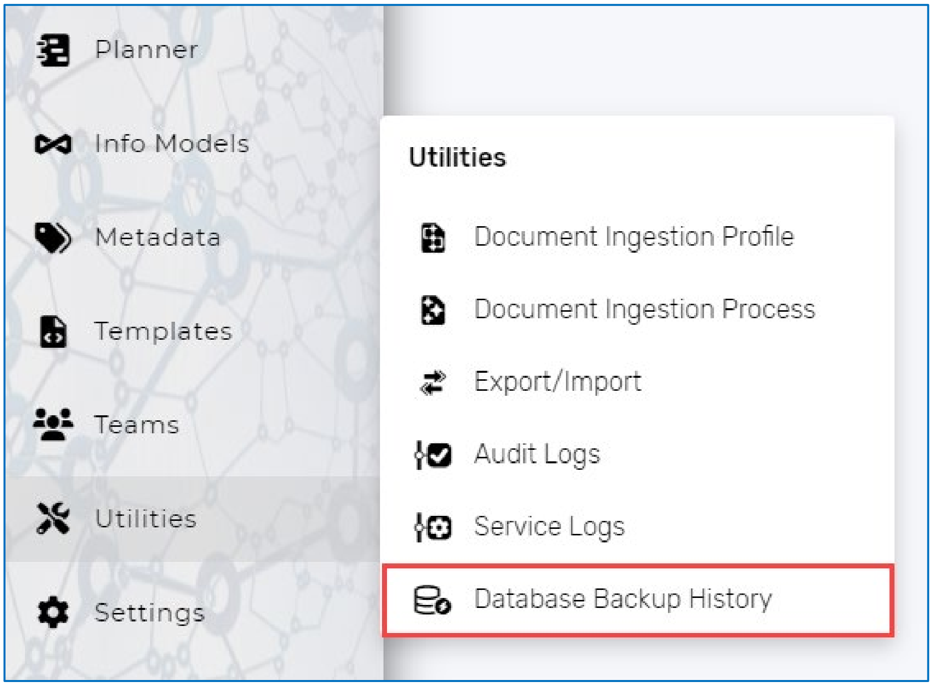
The Database Backup History is an available menu option for full control admins under the utilities menu in the InteliNotion Web Console.

The backup history list includes the following columns:

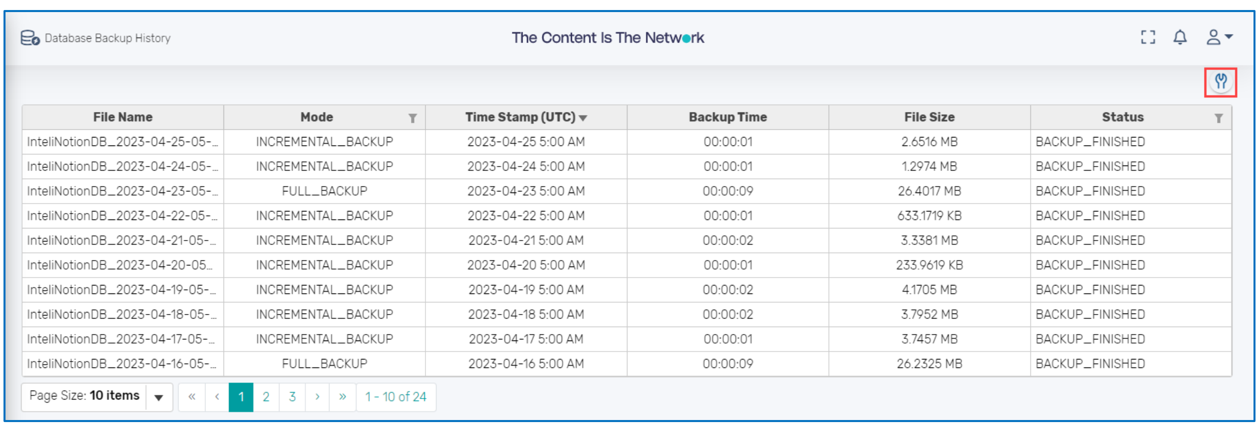
- File Name: The backup file name
- Mode: The backup mode with one of the following values:
  - FULL_BACKUP
  - INCREMENTAL_BACKUP
- Time Stamp (UTC): The date and time at which the backup was completed
- Backup Time: The time taken to complete the backup in hours:minutes:seconds
- File Size: The size of the backup file
- Status: The status of the backup job at the time the page is viewed. It will display one of the following values:
  - BACKUP_FINISHED
  - BACKUP_SCHEDULED
  - BACKUP_STARTED
  - BACKUP_ERROR

Follow the steps listed below to view the database backup history page.

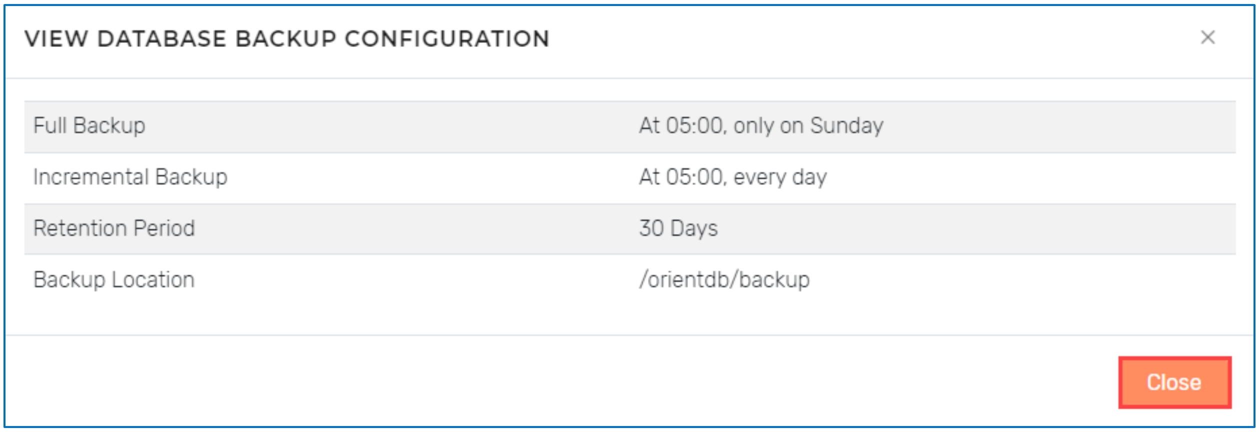
1. In the *Web Console*, hover over **Utilities** in the left-hand navigation pane and select **Database Backup History**.



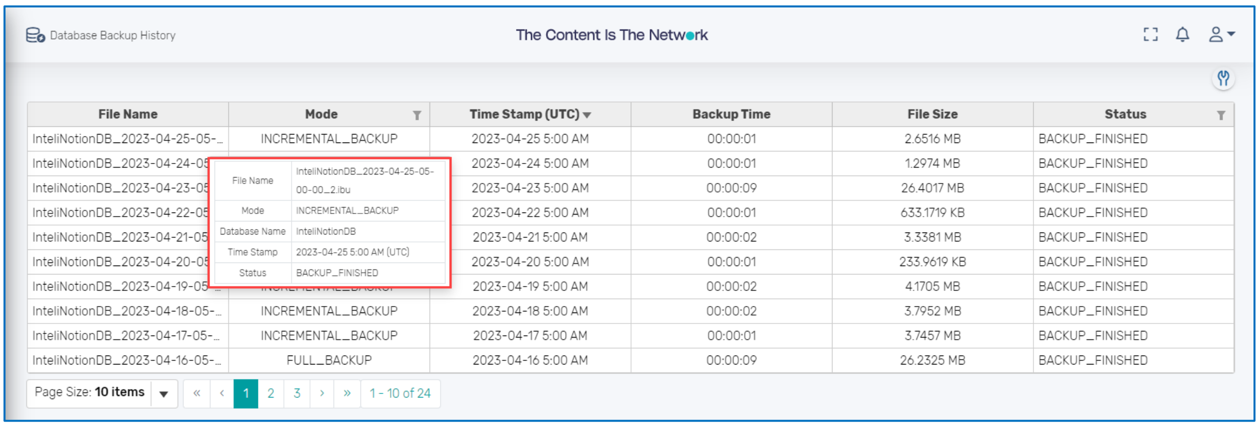
2. The database backup history page will display. To view the system backup configuration, click the **View database backup configuration** icon .



3. The **View Database Backup Configuration** window will display. Click **Close** to exit.



4. To view the information for any backup job, hover over the applicable job. A tool tip will display with detailed information about that job.



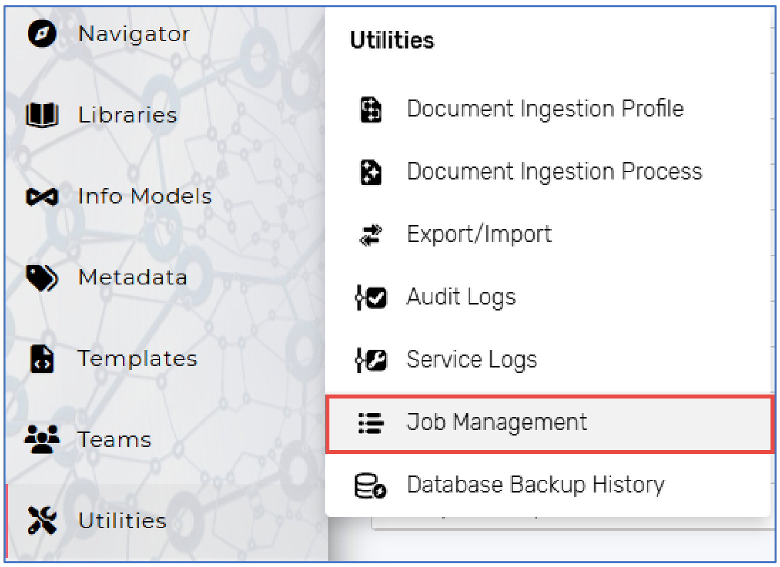
File Name	Mode	Time Stamp (UTC)	Backup Time	File Size	Status
InteliNotionDB_2023-04-25-05-...	INCREMENTAL_BACKUP	2023-04-25 5:00 AM	00:00:01	2.6516 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-24-05		2023-04-24 5:00 AM	00:00:01	1.2974 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-23-05		2023-04-23 5:00 AM	00:00:09	26.4017 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-22-05		2023-04-22 5:00 AM	00:00:01	633.1719 KB	BACKUP_FINISHED
InteliNotionDB_2023-04-21-05		2023-04-21 5:00 AM	00:00:02	3.3381 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-20-05		2023-04-20 5:00 AM	00:00:01	233.9619 KB	BACKUP_FINISHED
InteliNotionDB_2023-04-19-05		2023-04-19 5:00 AM	00:00:02	4.1705 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-18-05-...	INCREMENTAL_BACKUP	2023-04-18 5:00 AM	00:00:02	3.7952 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-17-05-...	INCREMENTAL_BACKUP	2023-04-17 5:00 AM	00:00:01	3.7457 MB	BACKUP_FINISHED
InteliNotionDB_2023-04-16-05-...	FULL_BACKUP	2023-04-16 5:00 AM	00:00:09	26.2325 MB	BACKUP_FINISHED

13.6 JOB MANAGEMENT

The Job Management screen provides a list of built-in jobs that run periodically to support various functionality and for housekeeping purposes in the *InteliNotion* platform. An Administrator can access the job listing via Utilities menu in the Web Console.

Follow the steps listed below to view the Job Management page, view jobs history or to modify the job schedule, where permitted.

1. In the *Web Console*, hover over **Utilities** in the left-hand navigation pane and select **Job Management**.



2. The Job Management page will display. To view the history of job either double click on the row or right click and select **View History**.

Name	Frequency (UTC)
Audit Table Partitioning	At 06:00 AM, only on Monday
Business Objects Cleanup	At 12:00 AM, every day
Clear Recycle Bin	At 01:00 AM, every day
Daily Subscription Emails	At 11:00:55 PM, every day
Database Backup Emails	At 08:00 AM, only on Monday
Database Full Backup History	At 07:00 AM, only on Monday
Database Incremental Backup History	At 06:00 AM, only on Monday
Job History Cleanup	At 02:00 AM, every day
License Expiry Emails	At 11:00 AM, every day
Monthly Subscription Emails	At 11:00:55 PM, on day 1 of the month
Search Index Reset	At 01:00 AM, every day
Search Index Update	Every 5 minutes, every hour, every day
Sync Repository Status	Every 5 minutes, every hour, every day
Weekly Subscription Emails	At 11:00:55 PM, only on Sunday

View History

3. The Job History page will display. You can review history of the job and where available download a job report by clicking on the download icon.

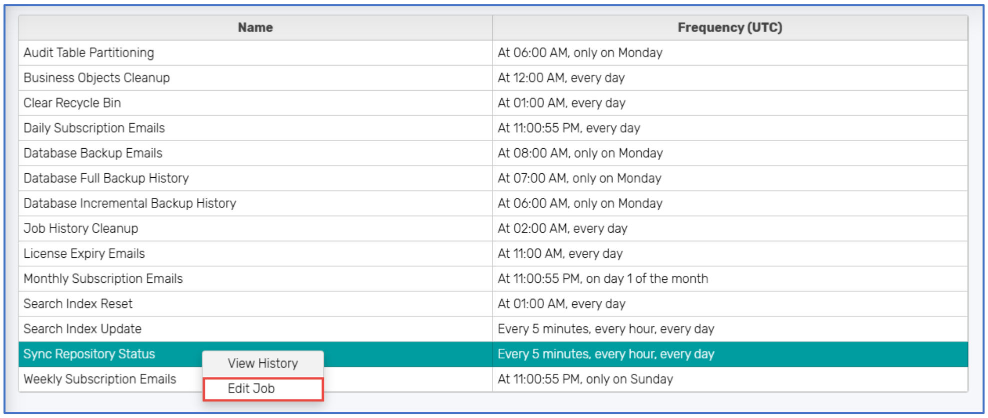
Name	Start Time	End Time	Comment	Download
Search Index Reset	2024-07-28 9:00 PM	2024-07-28 9:00 PM	No data found to process	
Search Index Reset	2024-07-27 9:00 PM	2024-07-27 9:00 PM	No data found to process	
Search Index Reset	2024-07-26 9:00 PM	2024-07-26 9:00 PM	No data found to process	
Search Index Reset	2024-07-25 9:00 PM	2024-07-25 9:00 PM	No data found to process	
Search Index Reset	2024-07-24 9:00 PM	2024-07-24 9:00 PM	No data found to process	
Search Index Reset	2024-07-23 9:00 PM	2024-07-23 9:00 PM	No data found to process	
Search Index Reset	2024-07-22 9:00 PM	2024-07-22 9:00 PM	No data found to process	
Search Index Reset	2024-07-21 9:00 PM	2024-07-21 9:00 PM	No data found to process	
Search Index Reset	2024-07-20 9:00 PM	2024-07-20 9:00 PM	No data found to process	
Search Index Reset	2024-07-19 9:00 PM	2024-07-19 9:00 PM	No data found to process	

Page Size: **10 items** « ‹ 1 2 3 4 › » 1 - 10 of 31

<u>Note:</u> By default, each day at 1 AM UTC, the *InteliNotion* system will run a **Search Index Reset** job. Based on the available data to process when the job runs, the following type of records will be displayed in the History:

- If there are no pending search index reset requests (due to either a direct action or via a deferred action due to a user selecting **No** when prompted to after changing the **Faceted** and/or **Searchable** setting on a property), then a 'No data found to process' comment will be displayed.
- If a user does update the business object with **Faceted** and/or **Searchable** setting on properties and selects 'No' to defer the reset search index, the action will be executed at 1 AM UTC. This action will be tracked under the search index reset job history list as a record only after it executes at 1 AM UTC with comment "Processed data found by the job".
- If user updates a business object without changing the 'Faceted' and/or 'Searchable' properties, the job history record for that specific day will have comment 'No data found to process'.

4. On the **Job Management** page, if a job schedule can be edited, an **Edit Job** option will display when right clicking a row for a job whose schedule can be updated by an application administrator, eg, **Sync Repository Status**.



Name	Frequency (UTC)
Audit Table Partitioning	At 06:00 AM, only on Monday
Business Objects Cleanup	At 12:00 AM, every day
Clear Recycle Bin	At 01:00 AM, every day
Daily Subscription Emails	At 11:00:55 PM, every day
Database Backup Emails	At 08:00 AM, only on Monday
Database Full Backup History	At 07:00 AM, only on Monday
Database Incremental Backup History	At 06:00 AM, only on Monday
Job History Cleanup	At 02:00 AM, every day
License Expiry Emails	At 11:00 AM, every day
Monthly Subscription Emails	At 11:00:55 PM, on day 1 of the month
Search Index Reset	At 01:00 AM, every day
Search Index Update	Every 5 minutes, every hour, every day
Sync Repository Status	Every 5 minutes, every hour, every day
Weekly Subscription Emails	At 11:00:55 PM, only on Sunday

a. To edit the Sync Repository Job and configure the schedule, right click on **Sync Repository Status** and click on the **Edit Job** option to change the schedule.

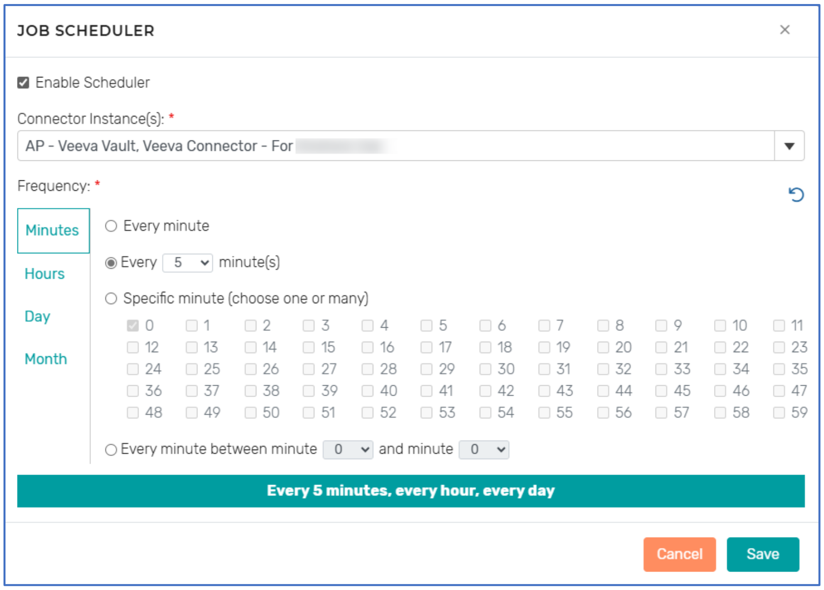
b. Select **Enable Scheduler** option to enable the job. The job will run only if it is enabled. It will be in the disabled state by default.

c. Select one or more **Connector Instances** listed in the dropdown that should be processed by the job. The list contains only those instances that have the "Enable Repository Status Synchronization" option checked)

d. Specify how frequently the job should be run by selecting the following parameters. Note that each parameter adds/modifies the schedule and does not replace the previous selection. For example, selecting the Hour first and Day next will create a schedule to run the job on the specified hours for each specified day.

- **Minutes**: Select appropriate internal from the available options.
- **Hours:** User will be able to set the hours from 0 - 23 values
- **Day:** Select one or more dates from 1 - 31 values or weekdays from Monday-Sunday values.
- **Month:** Select one or more of the listed months.

5. The selected schedule is described in text and updated as selections are changed. When satisfied, click **Save** to save the changes or **Reset** to discard changes and start over.



6. After the job has run or at any time as part of the operations, the results for each job run can be viewed by right clicking the **Sync Repository Status** and selecting **View History**. The log file will have the following details:
   - **Name**: Document Name in InteliNotion
   - **ID**: Document ID in InteliNotion
   - **Repository ID**: Document ID in the Repository
   - **State**: New document state in InteliNotion
   - **Previous State**: Previous state of the document in InteliNotion before it was updated.
   - **Repository Status**: Lifecycle state of the document in the repository at the time of run.
   - **Status**: Outcome of the lifecycle state update in InteliNotion listed as either **Failed** or **Completed**
   - **Comment**: Additional notes

14. SUPPORT ACTIVITIES FOR APPLICATION ADMIN

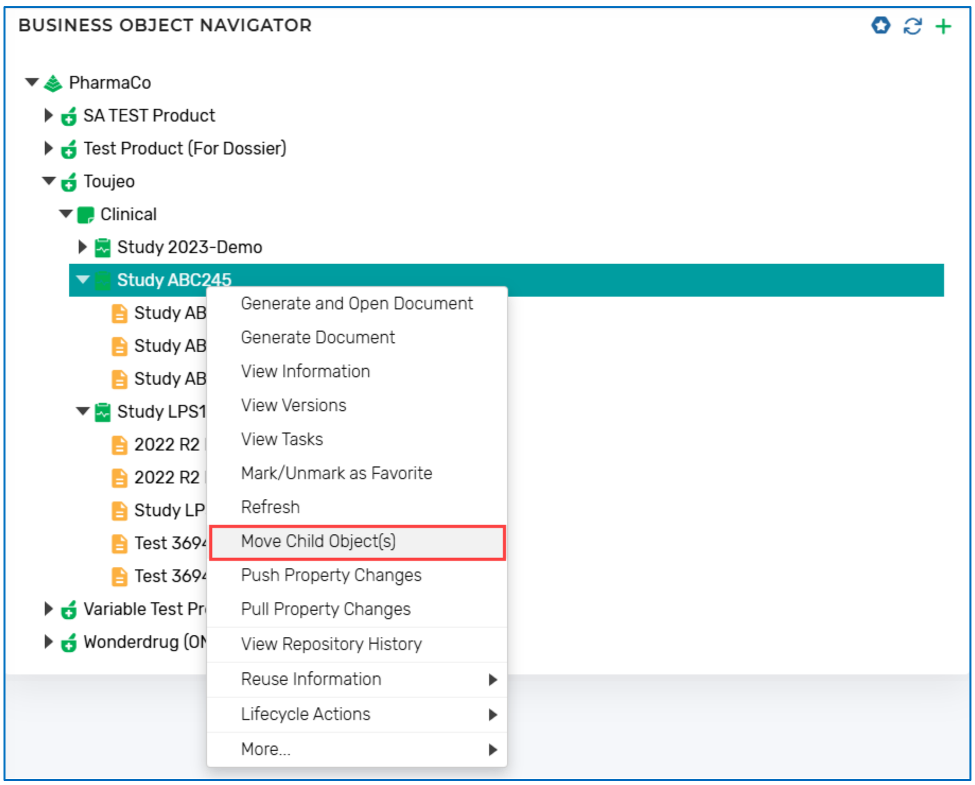
Please see the section below for instructions on completing admin support activities in *InteliNotion*. These functions can be performed with full admin control or applicable permissions, ie Navigation Modeler.

14.1 MOVING INSTANTIATED OBJECTS IN THE NAVIGATOR

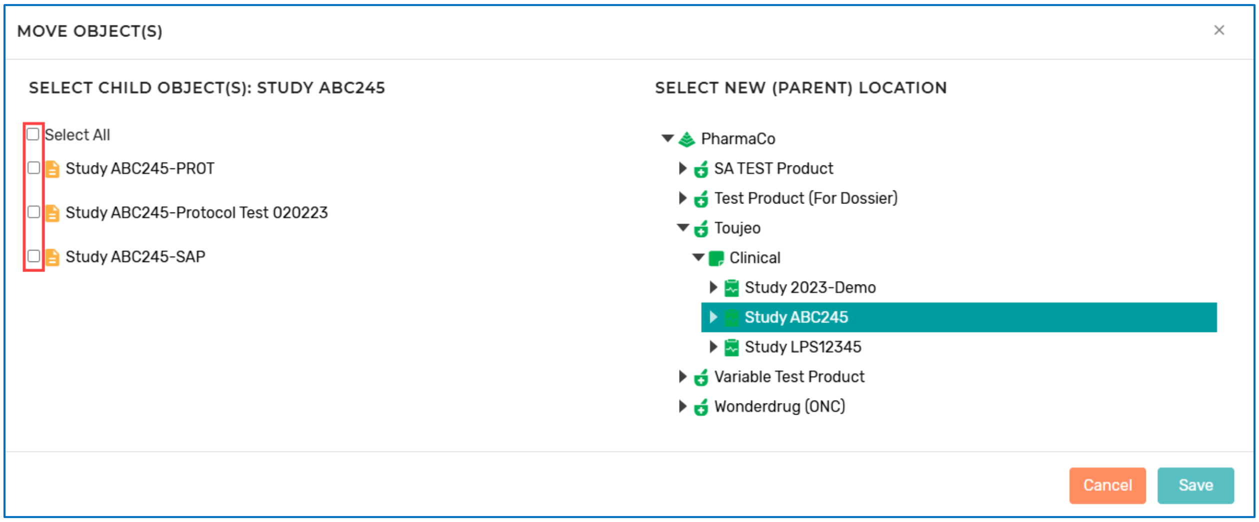
Follow the steps listed below to move instantiated objects in the Navigator.

Note: This functionality is available for objects that are checked in for full control admins or users with Navigation Modeler permissions.

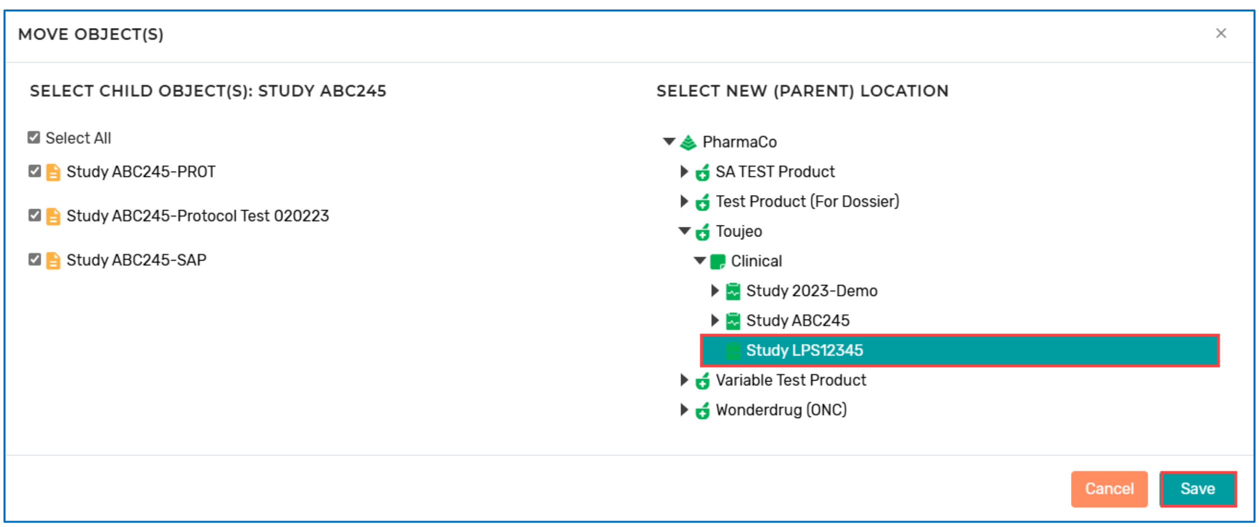
1. In the Navigator, right click on the object to be moved and select **Move Child Object(s)**.



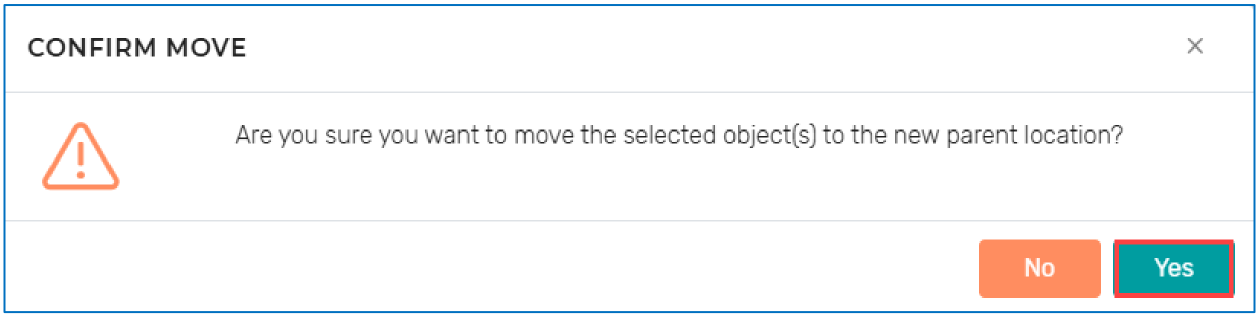
2. The **Move Objects** screen will display. Select the object or objects to be moved by clicking the checkboxes next to them in the left-hand **Select Object** screen or by clicking **Select All**.



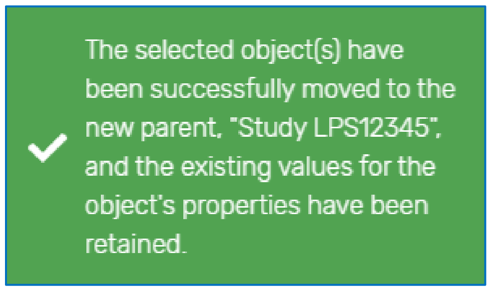
3. The current location of the child object(s) will be highlighted in the right-hand **Select New (Parent) Location** screen (see figure above). Navigate to the new desired location for the child object by clicking on it, and click **Save**.

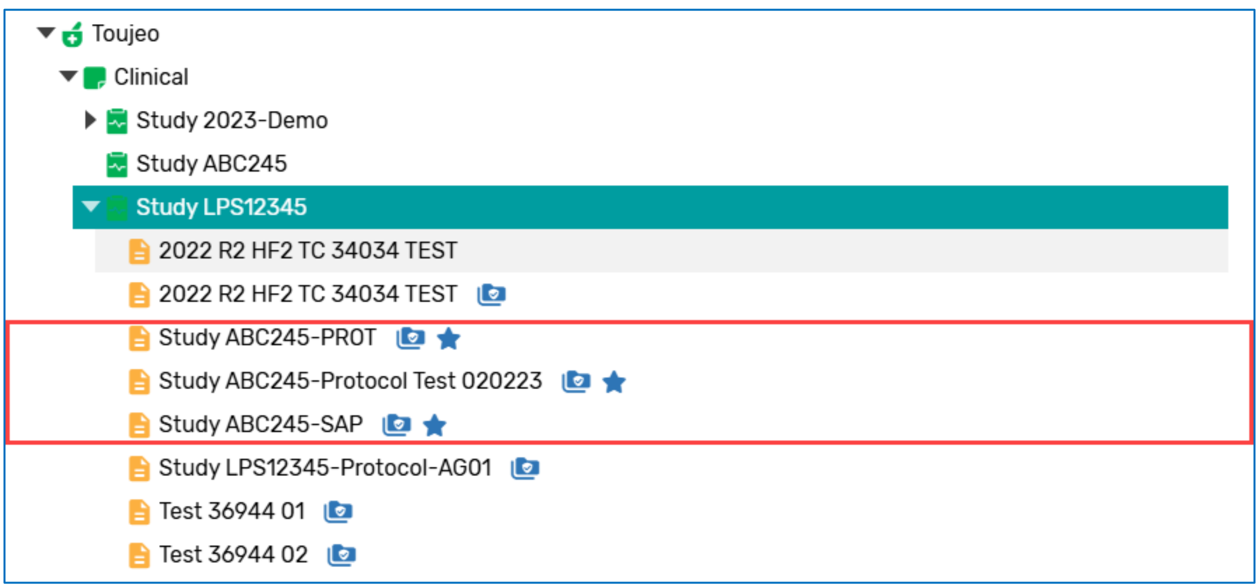


4. The confirmation pop-up window will display. Click **Yes**.

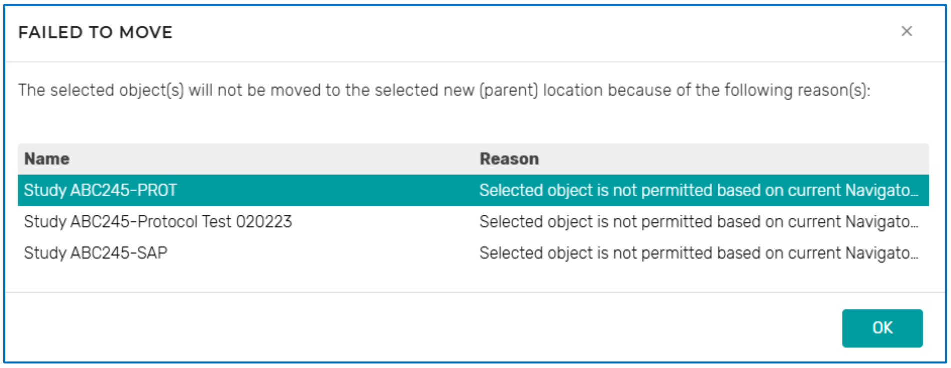


5. A message will display notifying the user that the selected items have been moved, and the items will be in the new location in the Navigator.





<u>Note:</u> If the selected new child object location is not configured for the objects to be moved, a 'Failed to Move' error message will display:



Selected object cannot be moved to the new (parent) location if:

- object is currently checked out
- selected object is not permitted based on current Navigator scheme
- object already exists in the selected location
- object does not exist (ie, deleted, not in system, in recycle bin)