# InteliNotion

# Terminology and Icons Guide

For InteliNotion Version: 2024.GR2.0
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# 1. TERMINOLOGY

The following terminology is used throughout the various InteliNotion guides as well as within the system itself.

- [Application] Admin: User with full control within the InteliNotion application.
- As-Is Reuse Policy: The source component's content is reused verbatim (i.e., cannot be changed) in the target document(s), and a relationship is maintained with its source.
- Business object (class): A model or representation of a real-world entity (e.g., study, document).
- Business Object Event: Auditing event for actions such as creating, updating, deleting, etc., a business object by authorized users in InteliNotion.
- Branch: A copy of an instantiated business object (e.g., Study ABC Protocol) that maintains a relationship back to its 'parent' (e.g., the source/original business object instance from which it was copied from) that then has its own version history and lifecycle.
- Common Instructional Text: Instructional text associated with multiple components of the document
- Configuration: A setting that is added/modified in InteliNotion for a specific functionality to work.
- Content Component: A defined block or piece of information that is contained within a boundary. It can be associated with/used in 1 more document. It has its own lifecycle, version history, etc. It can be searched in the database and then reused, as needed.
- Current User/User: Referred to the person(you) currently performing the action.
- Element: Used to define the behavior for a specific piece of content within a document or output. Configured as part of a given hierarchical set, inserted in a document template, and then used instantiate or create components or variables, based on the element's definition.
- Element Instructional Text: Instructional text associated with an individual element/ component only.
- De Novo Content: Content that is new and specific to the document for which it was created.
- Hierarchical Set: The 'backbone' or structure used to collect the elements needed to support component-based authoring of a document.

- Info Model: Refers to a hierarchical set with corresponding elements, typically created for a document or other output.

- Instructional Text: Content that is associated with a document, an element, or a library that provides users guidance about what types of information is expected, or in some cases not expected, in a section, subsection, or component within a document.

- InteliNotion Ribbon: InteliNotion MS Word Ribbon App that provides access to several InteliNotion-specific functions.

- Library Instructional Text: Instructional text associated with the library component.

- [Managed] Library Component: A specific component added to a library for central storage, governance, and usage.

- [Managed] Library: A type of library in InteliNotion that contains a collection of components that are standalone (i.e., not associated with a document) and were specifically added for reuse; this type of library has a single reuse policy for all its components.

- Metadata: A set of data that describes and gives information about other data (i.e., provides information about a certain item's content). Metadata values are controlled (and come from another source) and can never be changed by the user.

- Non-managed Library: A type of library in InteliNotion that allows any user to view all components or other business objects within a certain business domain.

- Property: Used to define a business object (e.g., document, component) and may be sourced from metadata, or be of another type (e.g., text, date, yes/no).

- Repurpose Reuse Policy: A branch of the source component's content is created so that its content can be edited when reused in the target document(s), and a relationship from the branch to its source is maintained.

- System Administrator: User from the application or technical support team.

- System Event: Auditing event for actions performed in the system by a user and does not apply to any specific business object (e.g., Document, Component).

- Template: Used to generate a document or other type of output within InteliNotion. Typically has inserted elements along with 'document' content (eg, header, footer).

- User Event: Auditing event for an individual user's interaction with InteliNotion including system access and managing role.

- Variable: Component within a document that is populated from a prespecified business object's property value (e.g., study number, product name).

- Variant: A branch of an instantiated document whereby the user can specify the behavior of the associated components (i.e., repurpose or as-is reuse from source, or remove) that has a relationship back to the original document.

- Web Console: InteliNotion's Browser-based user interface wherein users can generate documents, initiate, view, and complete tasks, view libraries, and view dashboards. In addition, admins can apply appropriate system configurations including relevant business objects, information models, metadata, etc.

- (InteliNotion) Word Ribbon/Task Pane App: InteliNotion's MS Word-based user interface wherein users can generate and author documents (using MS Word's full functionality), as well as initiate, view, and complete tasks. In addition, admins can configure document templates using the information models.

## 2. CONSOLE AND TASK PANE APP ICON LIST

## InteliNotion Web Console Icons

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 1. | About/Info (Header Panel Menu/Reuse Deviation Report) | |
| 2. | Action Menu (Libraries and Word Task Pane App) | |
| 3. | Add (Template / Notification Template / Project Task) | |
| 4. | Add files | |
| 5. | Additional Components | |
| 6. | API Keys (Console Sidebar Menu) | |
| 7. | Approved – Status Icon | |
| 8. | Audit Logs | |
| 9. | Auto Mapped Component – Status Icon | |
| 10. | Auto Update | |
| 11. | Batch Export into Word File | |
| 12. | Binding | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 13. | Business Object Modeler | |
| 14. | Cancel Checkout (Word Task Pane App) | |
| 15. | Card View (Libraries) | |
| 16. | Checked Out (Another User) | |
| 17. | Checked Out (Current user) | |
| 18. | Check Permissions (of a User) | |
| 19. | Clear Mapping | |
| 20. | Close Full Screen (Toggle) / Collapse All | |
| 21. | Co-authoring (Initiated by Another User) | |
| 22. | Co-authoring (Initiated by Current User) | |
| 23. | Collaborative Review | |
| 24. | Collection (Default BO Icon) | |
| 25. | Common Instructional Text | |
| 26. | Compare Change | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 27. | Component | |
| 28. | Component List (Word Task Pane App) | |
| 29. | Component Set – Status Icon | |
| 30. | Component Status Report | |
| 31. | Component Tag | |
| 32. | Component Tag Binding – Status Icon | |
| 33. | Console Settings | |
| 34. | Contains Base Component – Status Icon | |
| 35. | Content Tag | |
| 36. | Content Tagging | |
| 37. | Copy | |
| 38. | Copy Instructional Text | |
| 39. | Create From Copy | |
| 40. | Dashboards (Console Sidebar Menu) | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 41. | Database Backup History | |
| 42. | Default State Catalog | |
| 43. | Delete | |
| 44. | Disabled Component – Status Icon | |
| 45. | Document | |
| 46. | Document Ingestion | |
| 47. | Document Ingestion Profile | |
| 48. | Document Type | |
| 49. | Dossier | |
| 50. | Dossier Variant – Status Icon | |
| 51. | Download Report | |
| 52. | Drug Product | |
| 53. | Drug Substance | |
| 54. | Edit | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 55. | Element | |
| 56. | Element Content Lookup Variable – Status Icon | |
| 57. | Element Heading | |
| 58. | Element Instructional Text | |
| 59. | Enabled Template – Status Icon | |
| 60. | Export | |
| 61. | Export-Import | |
| 62. | Export-Import Instructional Text | |
| 63. | Export Report to Excel | |
| 64. | External Connectors | |
| 65. | External Repository – Status Icon | |
| 66. | Extract Components | |
| 67. | File Container (Dossier Manager) – Status Icon | |
| 68. | File Manager | |

![InteliNotion logo]

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 69. | Finalize Ingestion Process | |
| 70. | Folder (Dossier Manager) | |
| 71. | Folder View | |
| 72. | Footnote | |
| 73. | Form – Status Icon | |
| 74. | Full Screen View (Toggle) | |
| 75. | Import | |
| 76. | Import Report | |
| 77. | Info/About (Main Panel/Word Task Pane App) | |
| 78. | Info Models (Console Sidebar Menu) | |
| 79. | Initiation Library – Status Icon | |
| 80. | Instructional Text | |
| 81. | Job history | |
| 82. | Libraries (Console Sidebar Menu) | |

![InteliNotion logo]

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 83. | Library Instructional Text | |
| 84. | Library Auto-selection Rules | |
| 85. | License Key | |
| 86. | Lifecycle Modeler | |
| 87. | List View (Libraries) | |
| 88. | Log out (Console Header Panel Menu) | |
| 89. | Log Out (Word Task Pane App) | |
| 90. | Manage Ingestion Process | |
| 91. | Manage Properties Group | |
| 92. | Manage Rules | |
| 93. | Managed Library Component – Status Icon | |
| 94. | Manually Mapped Component – Status Icon | |
| 95. | Metadata (Console Sidebar Menu) | |
| 96. | Metadata Catalog | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 97. | Metadata Category | |
| 98. | Metadata Sourced Variable – Status Icon | |
| 99. | Metadata Sub-Category | |
| 100. | Metadata Value | |
| 101. | Metadata Value Lookup Variable – Status Icon | |
| 102. | Multiple Matching Components | |
| 103. | My Co-Authored Documents | |
| 104. | My Favorite Documents | |
| 105. | My Favorite Objects | |
| 106. | My Favorite Libraries | |
| 107. | My Favorites (Libraries) | |
| 108. | My Libraries | |
| 109. | My Settings (Console Sidebar Menu) | |
| 110. | My Settings (Console Header Panel Menu) | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 111. | My Workspace (Console Sidebar Menu) | |
| 112. | Navigator (Console Sidebar Menu) | |
| 113. | New – Status Icon | |
| 114. | Node/File Name Format | |
| 115. | Notifications (Console Header Panel) | |
| 116. | Notifications Settings | |
| 117. | Open Document/Download | |
| 118. | Open Navigator (Word Task Pane App) | |
| 119. | Organization | |
| 120. | Parent Property | |
| 121. | Planner (Console Sidebar Menu) | |
| 122. | Pop-Out Instructional Text | |
| 123. | Preview | |
| 124. | Product | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 125. | Property Set | |
| 126. | Quality Check | |
| 127. | Query | |
| 128. | Query List | |
| 129. | Query Response | |
| 130. | Recycle Bin | |
| 131. | Refresh | |
| 132. | Remove | |
| 133. | Repeating element (Allow Multiple) – Status Icon | |
| 134. | Reset Restore | |
| 135. | Restricted Editing | |
| 136. | Reusable Element – Status Icon | |
| 137. | Reuse Deviation Report | |
| 138. | Reuse Report | |

| Sr. No. | IN Function | IN Icon |
|---------|-------------|---------|
| 139. | Role | |
| 140. | Root (Info Model Explorer) | |
| 141. | Save (Regular) | |
| 142. | Save (Solid) | |
| 143. | Save Document/Upload | |
| 144. | Search | |
| 145. | Select (Library List) | |
| 146. | Service Logs | |
| 147. | Session Settings (User Management) | |
| 148. | Settings (Console Sidebar Menu) | |
| 149. | Show All (Libraries) | |
| 150. | Show Approved Only (Libraries) | |
| 151. | Show/Hide Filters (Libraries) | |
| 152. | Structured – Status Icon | |

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 153. | Study | |
| 154. | Sub-Root (Info Model Explorer) | |
| 155. | Table Element – Status Icon | |
| 156. | Task | |
| 157. | Task List / My Tasks | |
| 158. | Team (Teams – Console Sidebar Menu) | |
| 159. | Template (Templates – Console Sidebar Menu) | |
| 160. | Template Variant | |
| 161. | Tenant | |
| 162. | Theme (Word Task Pane App) | |
| 163. | Toggle On | |
| 164. | Toggle Off | |
| 165. | Unstructured – Status Icon | |
| 166. | Update Task Plan Start Dates | |

![InteliNotion logo]

| Sr. No. | IN Function | IN Icon |
|---|---|---|
| 167. | User (Regular) – Console Header Panel Settings | |
| 168. | User (Solid) – Word Task Pane App | |
| 169. | Users (Settings Menu) | |
| 170. | Utilities (Console Sidebar Menu) | |
| 171. | Validation Report | |
| 172. | Value Relationship Manager | |
| 173. | Version Binding | |
| 174. | View | |
| 175. | View All Deleted Items (Recycle Bin) | |
| 176. | View Configuration | |
| 177. | View Library | |
| 178. | View Model / Relationship Map | |
| 179. | View My Deleted Items (Recycle Bin) | |

## Word Ribbon App Icons:

| Sr. No. | IN Function | Icon |
|---|---|---|
| 1. | About InteliNotion | |
| 2. | Cancel Checkout | |
| 3. | Change Summary | |
| 4. | Check & Fix | |
| 5. | Child Document(s) Report | |
| 6. | Component Status Report | |
| 7. | Content Control Properties | |
| 8. | Convert Text | |
| 9. | Delete Column | |
| 10. | Delete Selected Component or Variable | |
| 11. | Delete Row | |
| 12. | Delete Table | |
| 13. | Enable Editing | |

| Sr. No. | IN Function | Icon |
|---|---|---|
| 14. | Info Model Status Report | |
| 15. | Ingest Document | |
| 16. | Insert Check Box Content Control | |
| 17. | Insert Combo Box Content Control | |
| 18. | Insert Date Picker Content Control | |
| 19. | Insert Dropdown List Content Control | |
| 20. | Insert Column | |
| 21. | Insert Row | |
| 22. | Insert Rich Text Content Control | |
| 23. | Insert Set | |
| 24. | Instructional Text | |
| 25. | Move Column Left | |
| 26. | Move Column Right | |
| 27. | Move Group Down | |

| Sr. No. | IN Function | Icon |
|---|---|---|
| 28. | Move Group Up | |
| 29. | Move Row Down | |
| 30. | Move Row Up | |
| 31. | Next | |
| 32. | Open/Close InteliNotion App | |
| 33. | Refresh Styles | |
| 34. | Remove Text | |
| 35. | Review Mode | |
| 36. | Save Document | |
| 37. | Setup | |
| 38. | Sync Tables | |