



User Guide Module 2: Accessing IntelNotion

For IntelNotion Version: 2024.GR2.0

Last Modified: November 2024

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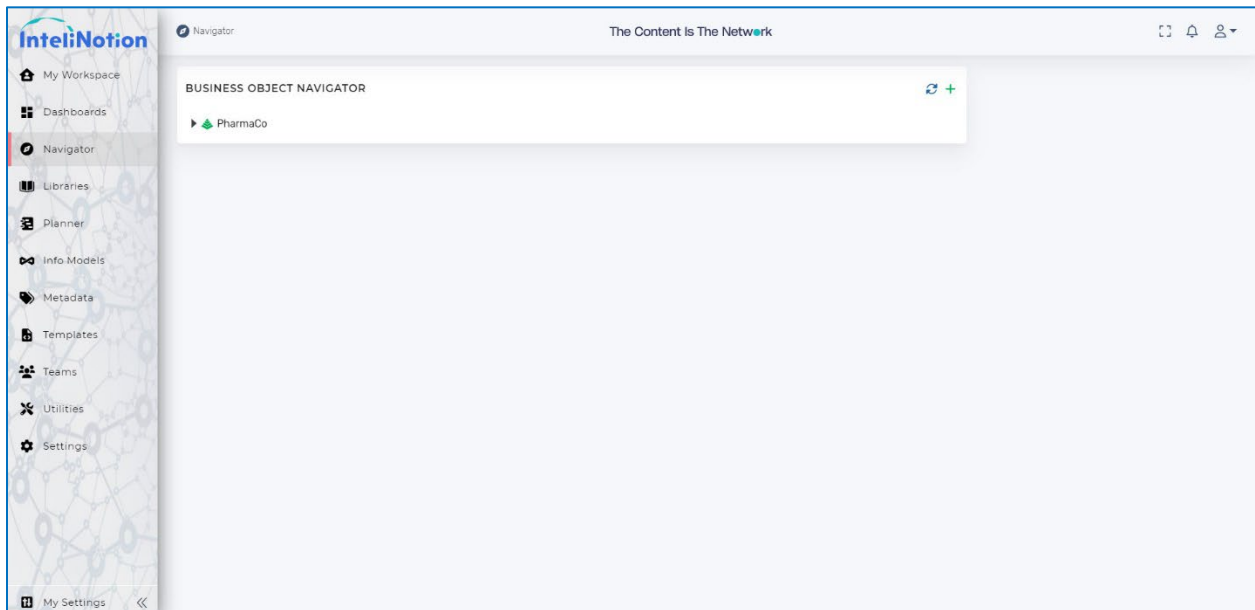
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1. ACCESSING THE INTELINOTION WEB CONSOLE

1. Using a Web Browser (eg, Google Chrome), navigate to the *Web Console*.
2. Users should log into the system using their *InteliNotion* or *Microsoft (MS) Office 365* credentials.
3. After successful login, users will see the following page:



Note: The **Business Object Navigator** is configurable and may vary from what is shown in the screenshot above.

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2. INSTALLING THE INTELINOTION MS WORD APP

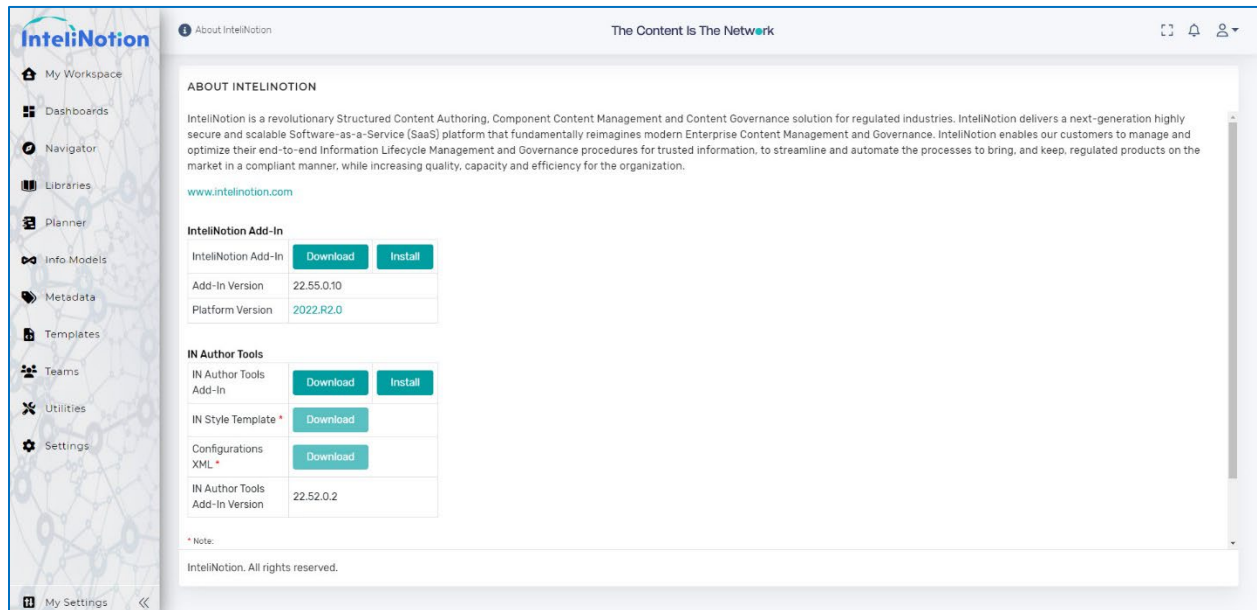
Warning: Please close all *MS Word* windows before executing the steps below.

The *InteliNotion Word Application (App)* can be enabled after installing the related Add-in, which can be accessed via the following browsers:

- Google Chrome
- Internet Explorer
- Microsoft Edge

There are 2 methods to download and install the *InteliNotion Word App* (see sections below for installation instructions):

- Method 1: Direct Browser Installation via **Install InteliNotion Add-in**
- Method 2: Download/Manual Installation via **Download/Manual Installation**



Notes:

- The **IN Author Tools Add-In** section will not appear if the items have not been uploaded to the *Web console*. If available, refer to the **InteliNotion Author Tools User Guide** for details on how to install and use the Author Tools Add-In.
- The actual version of the Platform (*Web Console*) and/or Add-in (*InteliNotion Word App*) may vary from what is shown in the screenshot.

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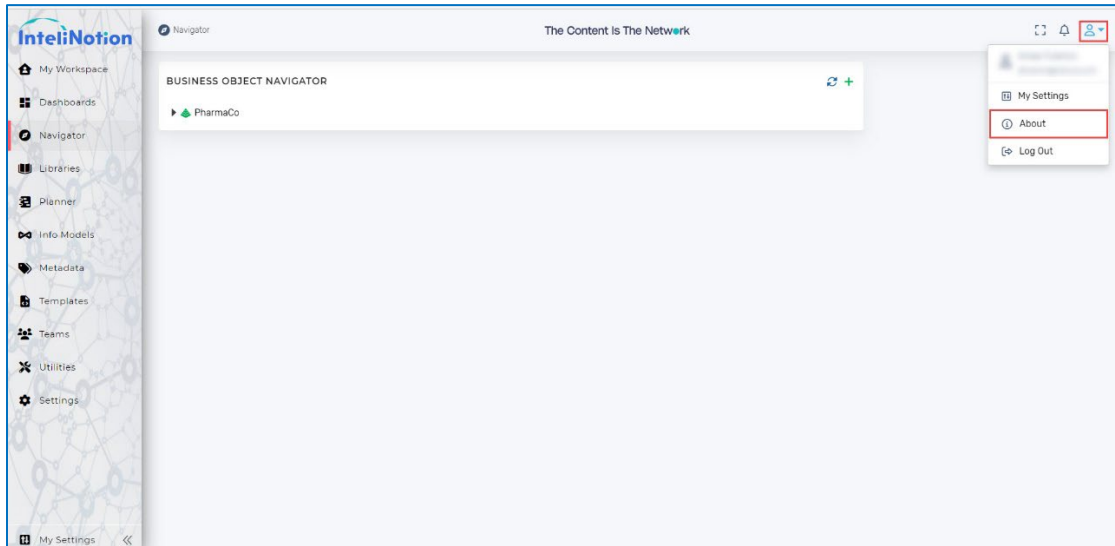
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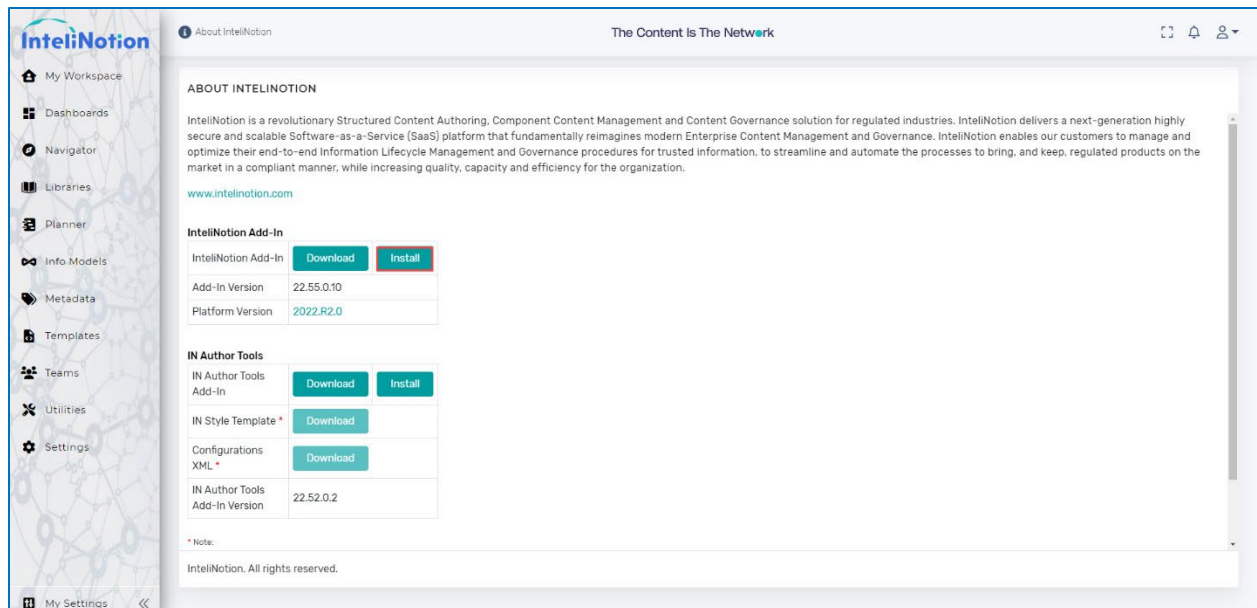
2.1 METHOD 1: DIRECT BROWSER INSTALLATION

Note: The **Install InteliNotion Add-in** option is available **only** in Microsoft Edge or Internet Explorer browsers. If this method is chosen, the *InteliNotion Word App* will automatically update when a user opens *MS Word* and a newer version of the *InteliNotion Add-in* is available.

1. From the *Web Console*, click on the **user icon**  in the top right corner, and click **About** in the dropdown menu.



2. On the **About** page, scroll down and click **Install** to download the add-in.



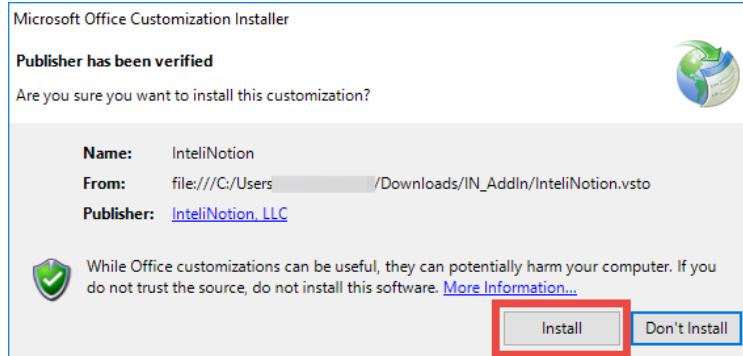
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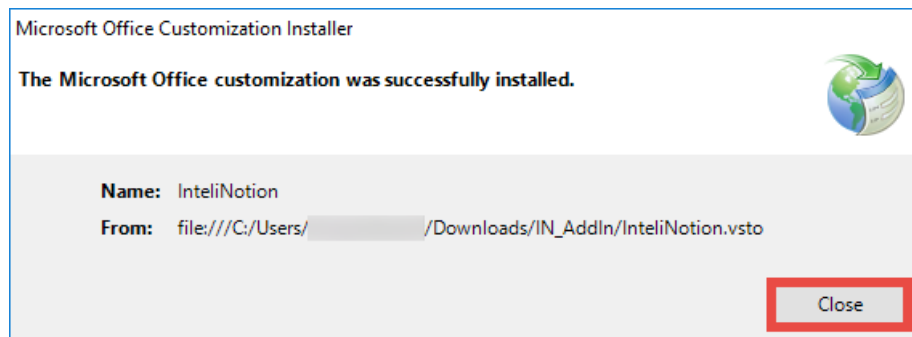
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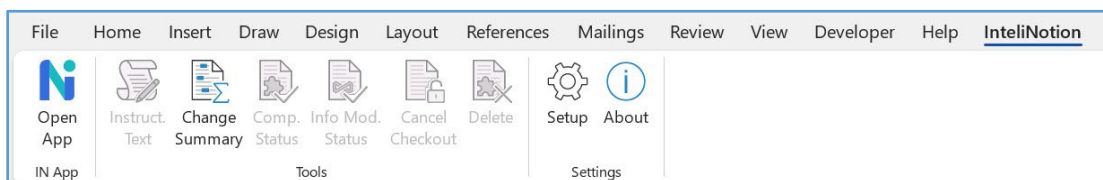
- Click **Install** to install the Add-in.



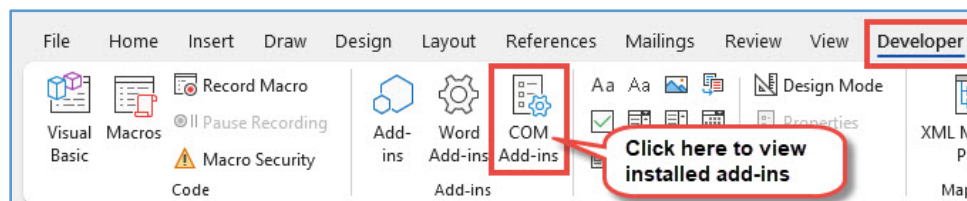
- After a successful installation, a pop-up window will appear on the screen; click **Close** to continue.



- To verify the successful installation of the *InteliNotion Add-in*, open *MS Word*; the *InteliNotion* tab should now be visible in the ribbon toolbar.



Note: If the user has the TransCelerate Clinical Templates Suite (CTS) based add-ins installed, it is best practice to disable them while using the *InteliNotion Add-in*.

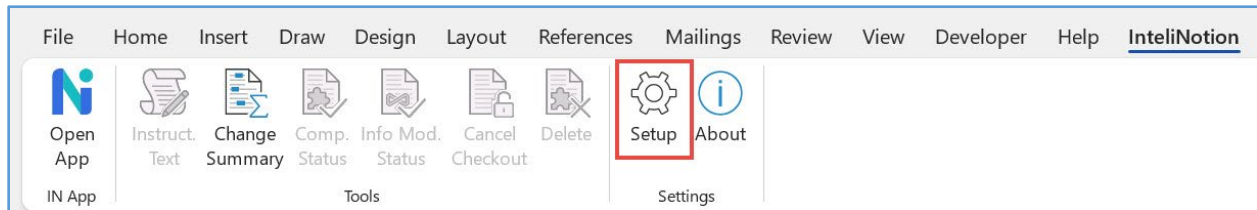


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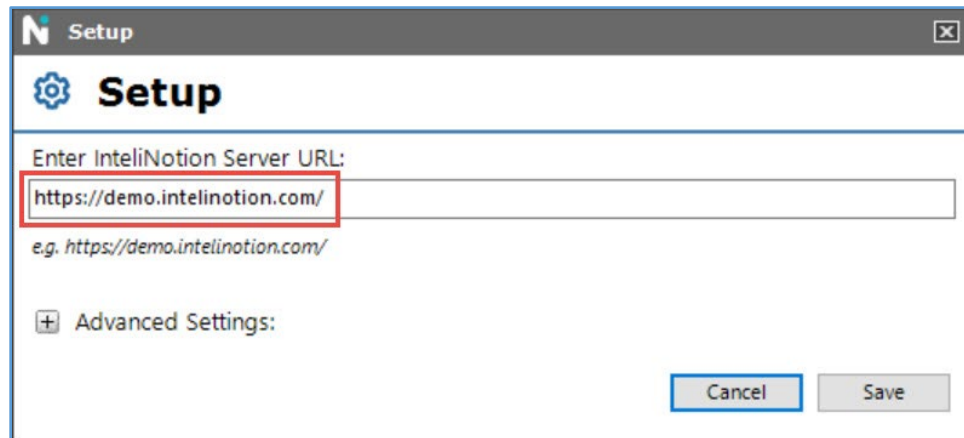
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- Under the InteliNotion tab, click **Setup**.



- Verify that the *InteliNotion* URL field is automatically populated based on the site from where the Add-in was installed. Click **Save**.



Note: If the URL in the Setup window does not match the URL of the item the user is trying to open (eg, <https://companyabc.intelination.com>), the user will receive an automated error message notifying him/her that the URLs do not match, and the item cannot be opened.

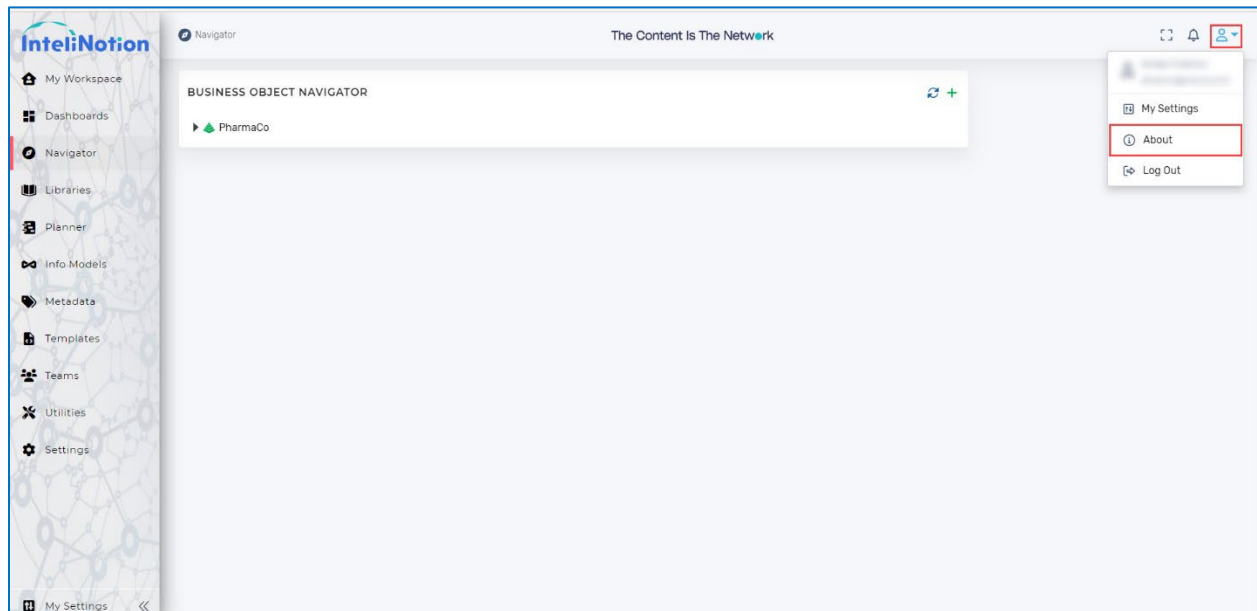
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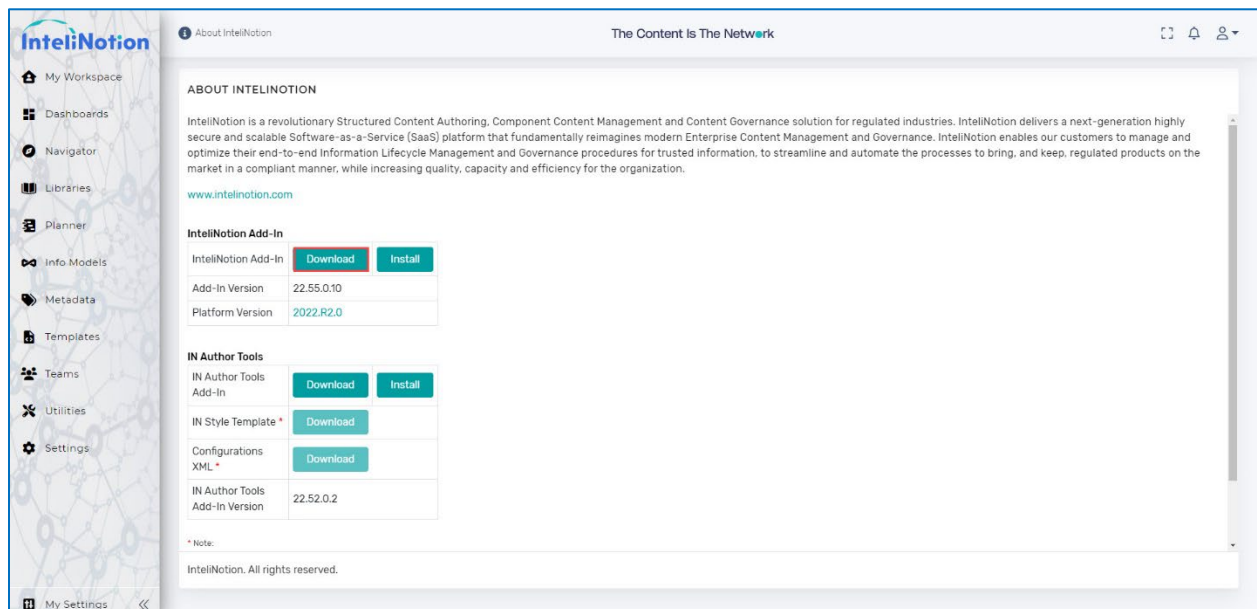
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2.2 METHOD 2: DOWNLOAD/MANUAL INSTALLATION

1. From the *Web Console*, click on the **user icon**  in the top right corner, and click **About** in the dropdown menu.



2. On the About page, scroll down and click **Download** to download the *IntelINotion Word App* installer.



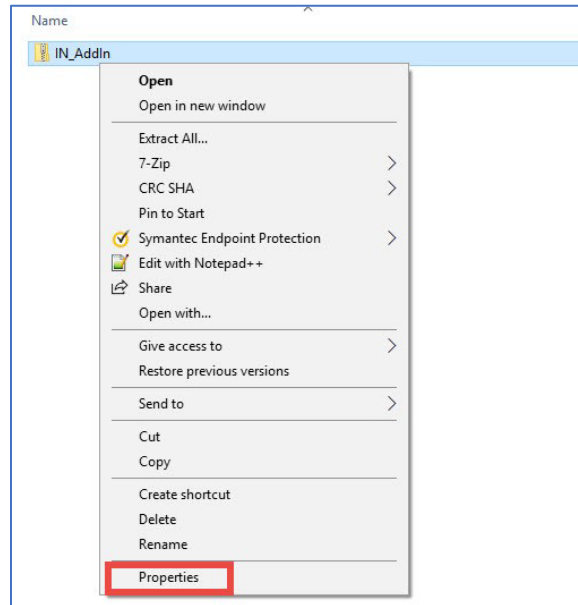
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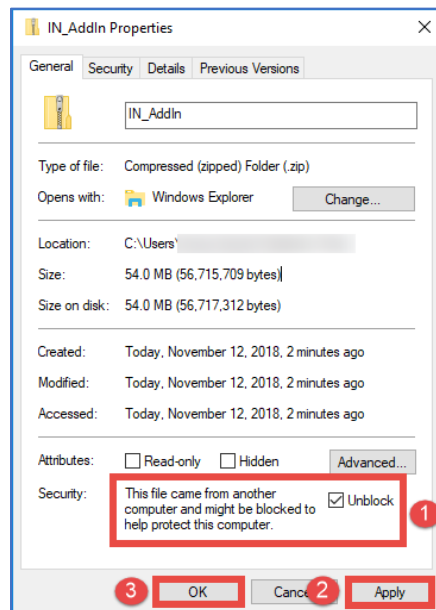
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Note: The actual version of the Platform (*Web Console*) and/or Add-in (*InteliNotion Word App*) may vary from what is shown in the screenshot.

3. Navigate to the designated download folder and find the downloaded zip file named **IN_AddIn**. Check that the zip file has not been blocked; right-click the file and click **Properties**.



4. If a security warning with an Unblock option checkbox at the bottom of the screen appears, click on the checkbox labeled **Unblock**, click **Apply**, and then click **OK**.

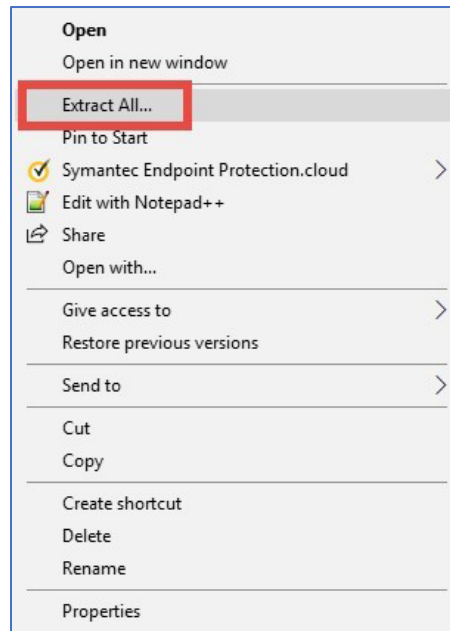


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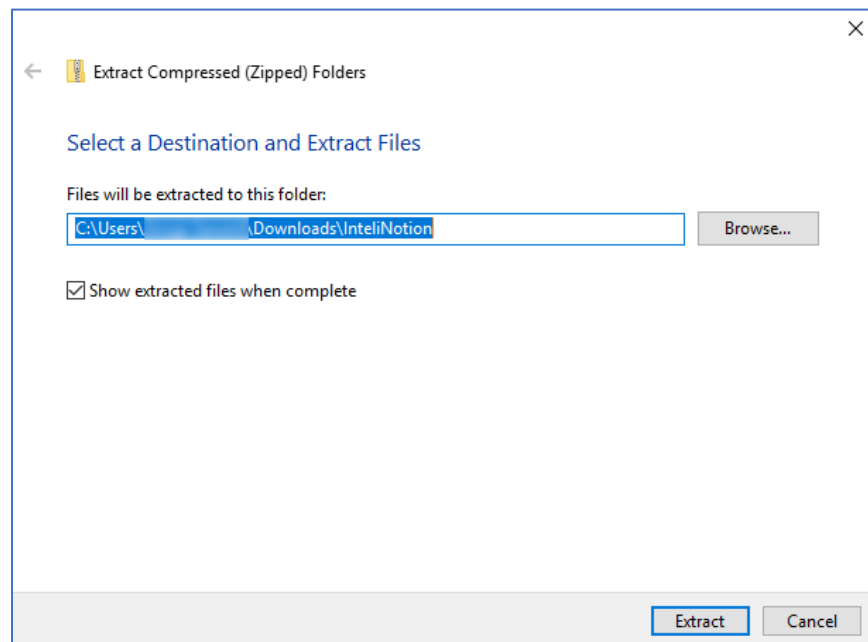
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5. To unzip the file, right-click on the file and click **Extract All**.



Note: If **Extract All** is not shown, look for the **Open with WinZip** option.

6. Click **Extract** in the pop-up window (the auto-populated folder location is the same as the user's downloaded zip file).

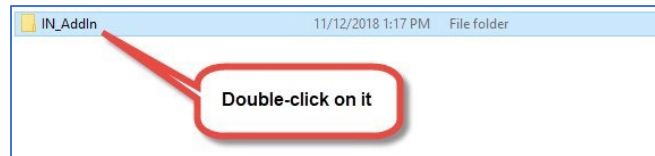


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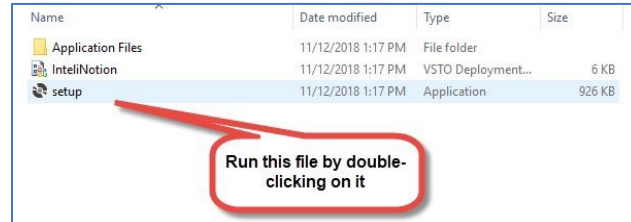
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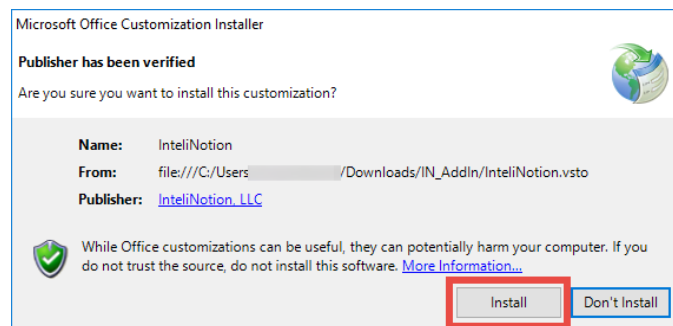
7. In the File Explorer window that automatically opens, double-click on the **InteliNotion IN_AddIn** folder.



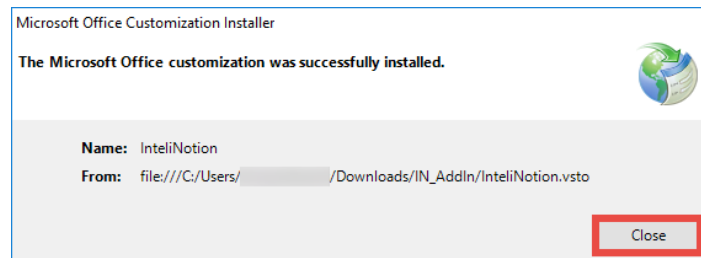
8. Double-click on the **setup** file to run it.



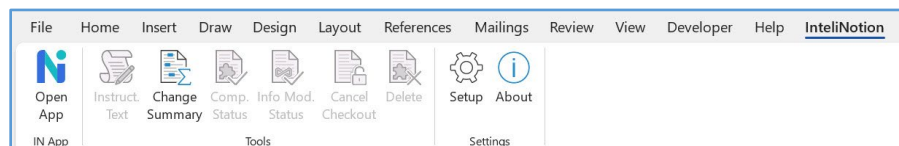
9. Click **Install** to install the Add-in.



10. After a successful installation, a pop-up window will appear on the screen; click **Close** to continue.



11. To verify the successful installation of the InteliNotion Add-in, open *MS Word* and the **InteliNotion** tab should now be visible in the ribbon toolbar.

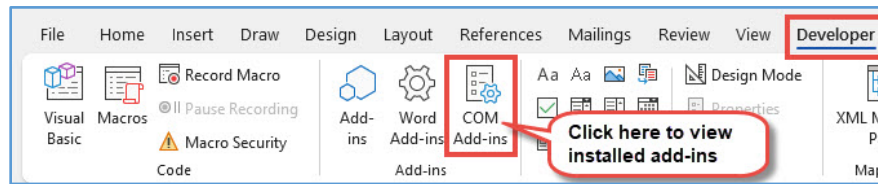


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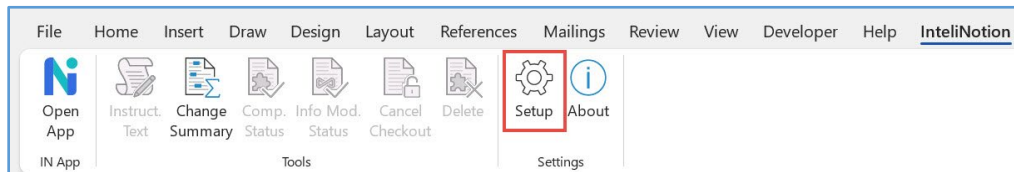
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Note: If the user has the *TransCelerate CTS* based add-ins installed, it is best practice to disable them while using the InteliNotion Add-in.

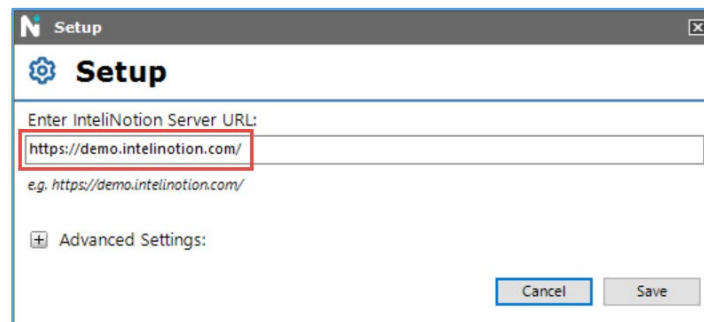


12. Next, manually enter the URL to access the *Web Console* as follows:

- Under the **InteliNotion** tab, click **Setup**.

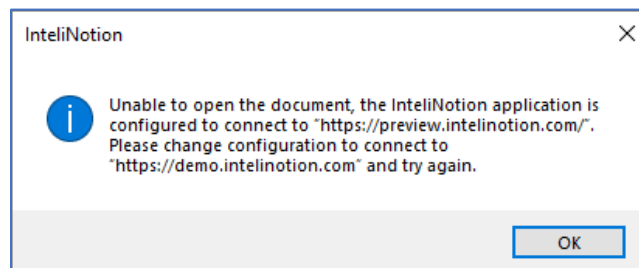


13. Within the **InteliNotion URL** field, enter the designated URL (see example below) and click **Save**.



Notes

- To update to a newer version of the *InteliNotion Word App*, steps 1-9 will need to be repeated.
- If the URL in the Setup window does not match the URL of the item the user is trying to open (eg, <https://companyabc.intelinotion.com>), the user will receive an automated error message notifying him/her that the URLs do not match, and the item cannot be opened.



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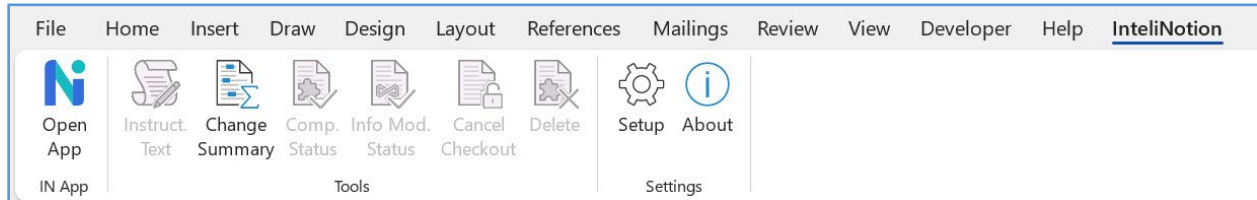
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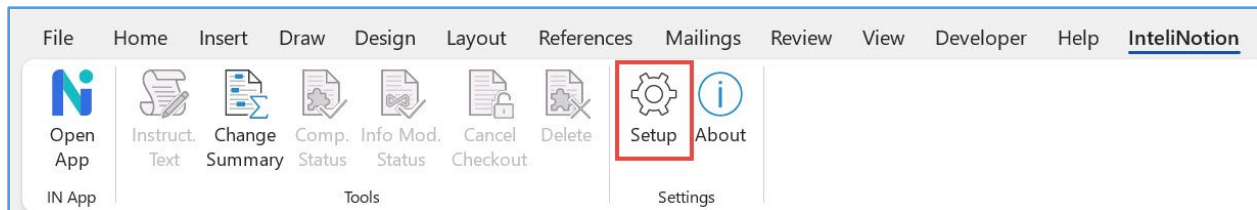
3. ACCESSING THE INTELINOTION WORD APP

After the *InteliNotion Word App* has been installed, it must be configured and enabled for use.

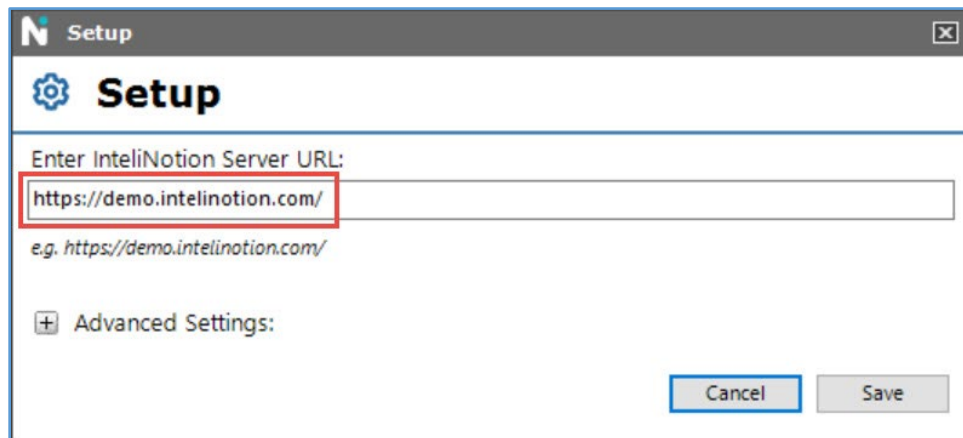
1. Click on the *InteliNotion* tab in the ribbon toolbar of *MS Word*.



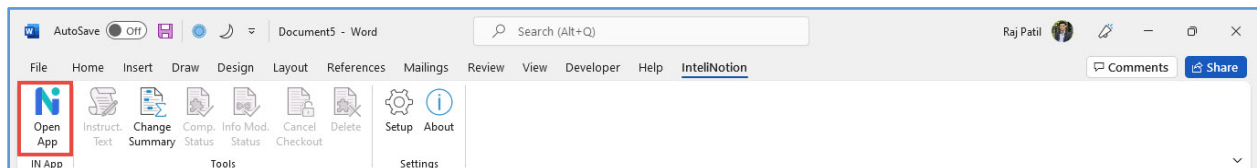
2. Click on **Setup** under the **Settings** group in the *InteliNotion* ribbon.



3. Insert the appropriate *InteliNotion* site's URL and click **Save**.



4. Click **Open App** in the *InteliNotion Word App* group in the InteliNotion ribbon.

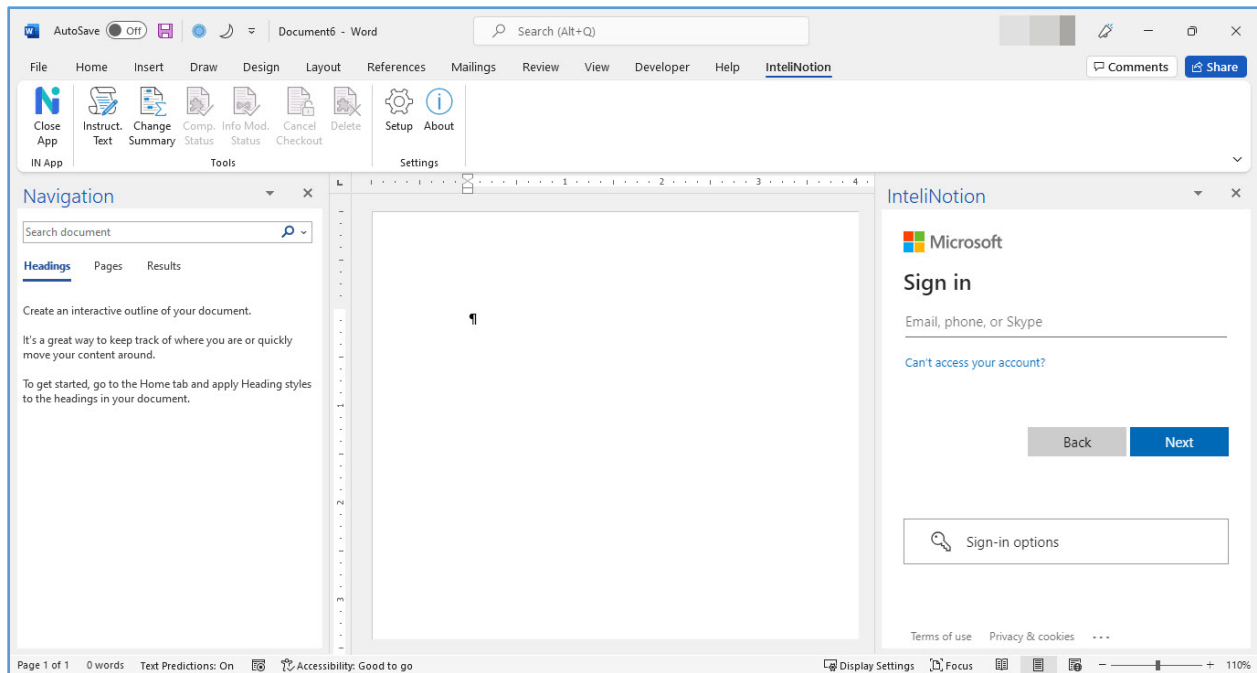


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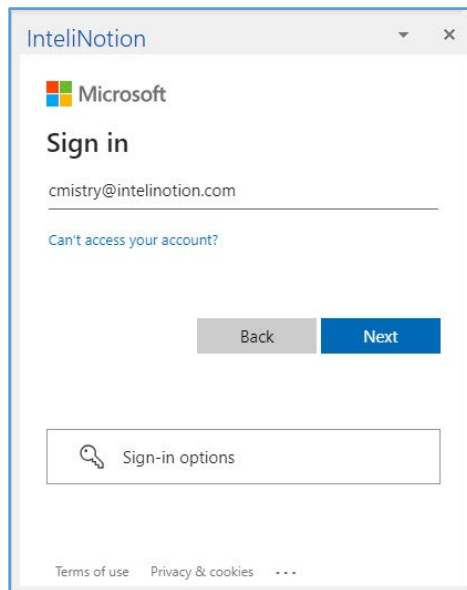
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5. The *InteliNotion Word App* pane appears on the right-hand side of the screen as shown below.



6. The user should log in with their *InteliNotion* or *MS Office 365* credentials.



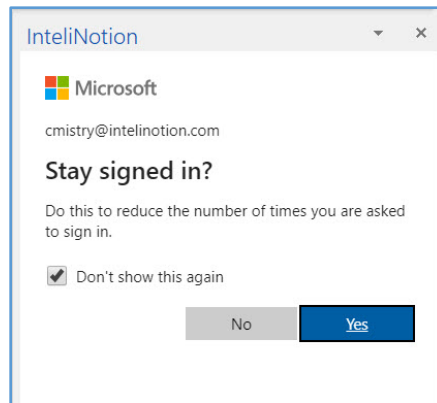
Note: The user may have to log in every time they open the *InteliNotion Word App* if they are not using an *Office 365* account.

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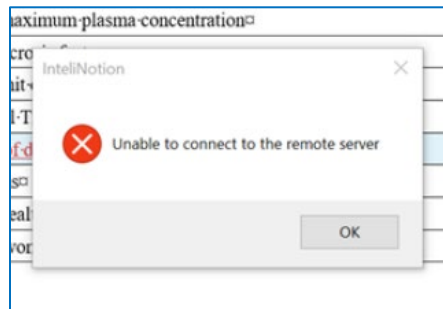
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7. To reduce the number of times that sign-in is required, check the box labeled **Don't show this again** and then click **Yes**.

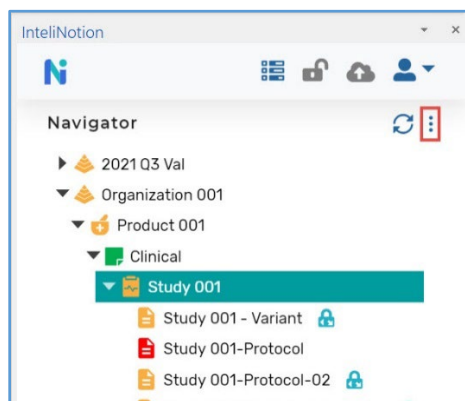


Note:

- The user may have to select a certificate based on his/her organization's security policy.
- If there is a problem with the connection to *InteliNotion*, the following message will appear. Contact the administrator.



8. After a successful login, the *InteliNotion Word App* opens to show the **Navigator** view by default.



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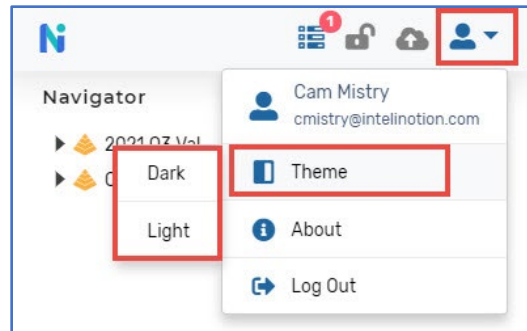
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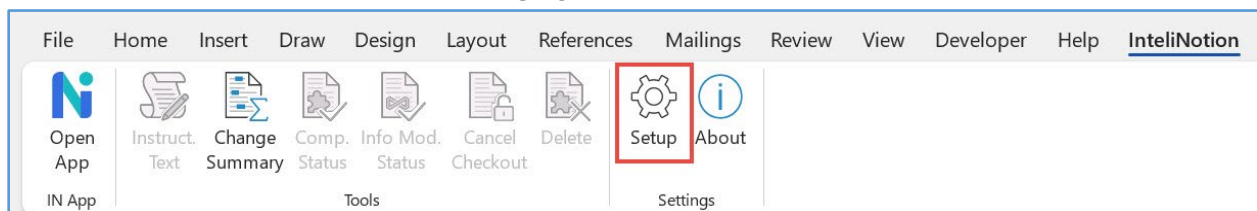
- Other views (eg, **Search**, **My Widgets**, etc.) are available using the **vertical ellipsis** in the top right corner.
- If a non-default browser is being used, a message may display informing the user that the Navigator is unreachable, and *Word* will have to be restarted.

9. To change the theme of the *InteliNotion Word App* from Light (default) to Dark, click the **User Settings** arrow, hover over **Theme**, and click on the desired theme.

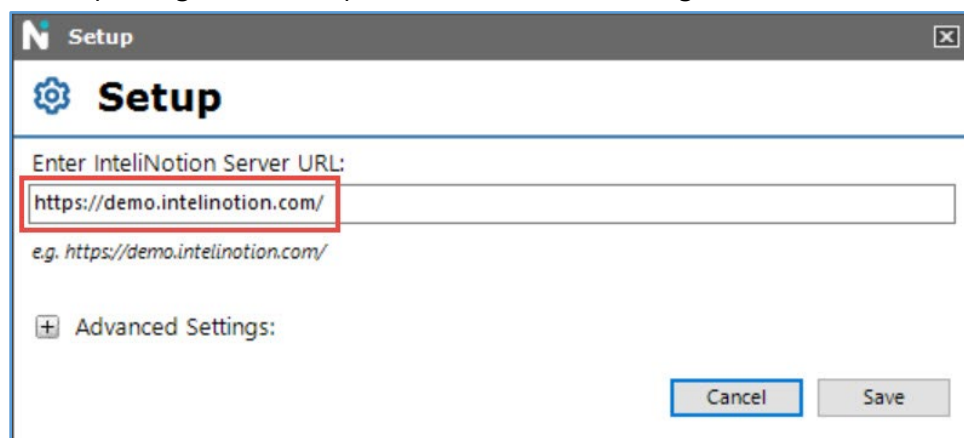


3.1 INTELINOTION WORD APP ADVANCED SETTINGS

1. Click on **Setup** under the **Settings** group in the *InteliNotion* ribbon.



2. Click the plus sign icon to expand the Advanced Settings.

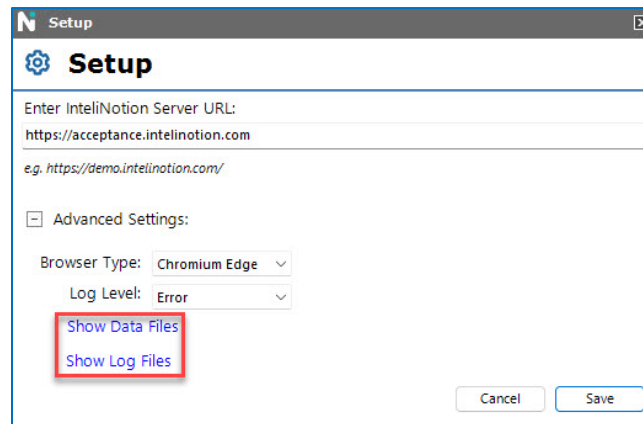


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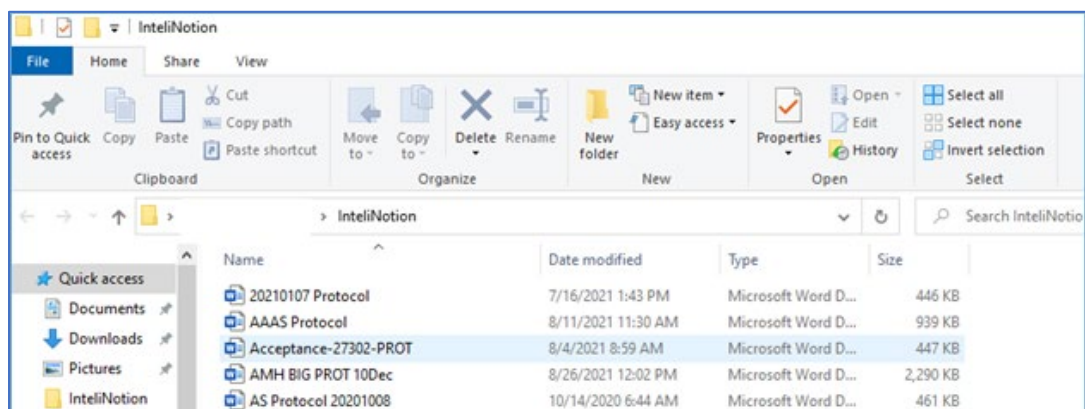
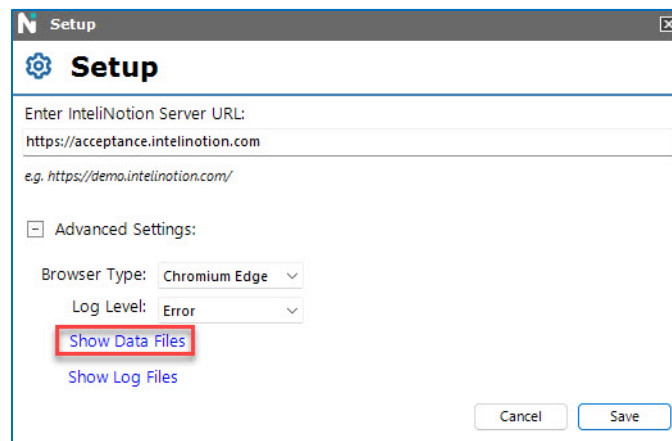
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- The **Browser Type** and **Log Level** settings will have default values that should not be changed unless requested by an admin.



- Click **Show Data Files** to display a list of the temporary data files that have saved to your computer, as per the user's predefined **Download Location** (see [Module 3, Section 2.2.1](#))

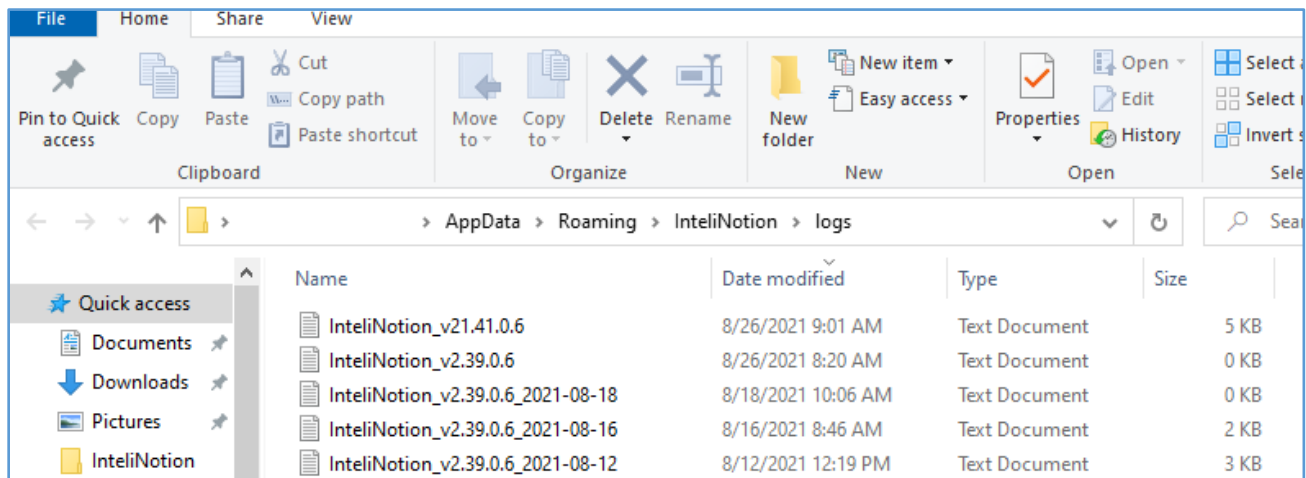
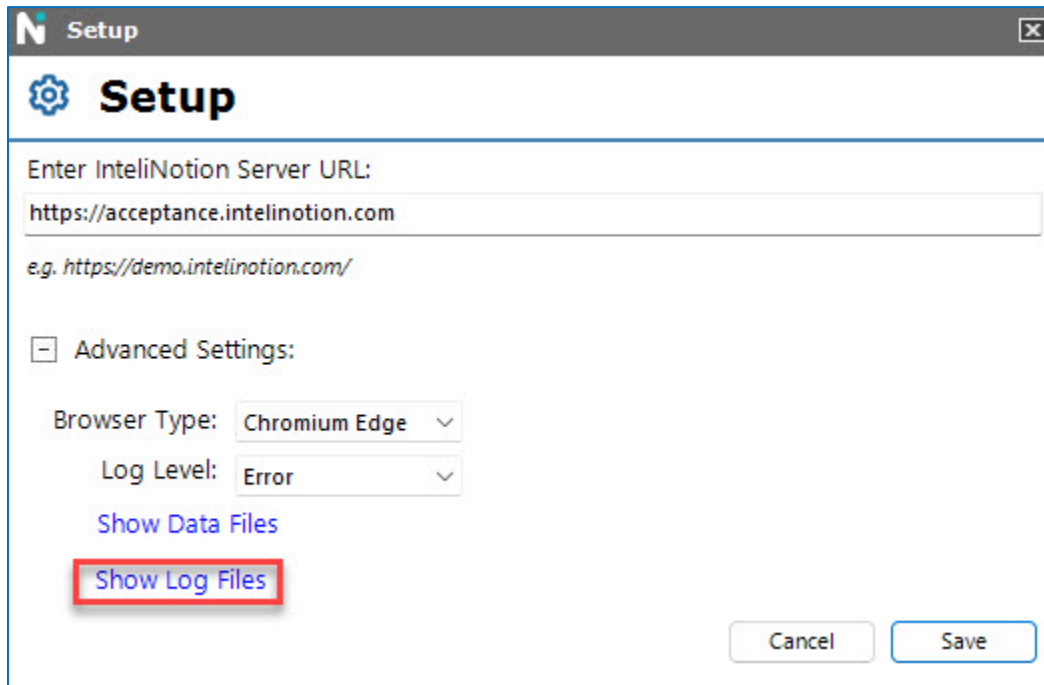


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- To open and view the log files, which may be requested by an admin to help troubleshoot issues, click on **Show Log Files**. The log file for the current day will not include a date in its filename. When the date changes, a new log file is added and the prior one is updated to reflect the date it was created.



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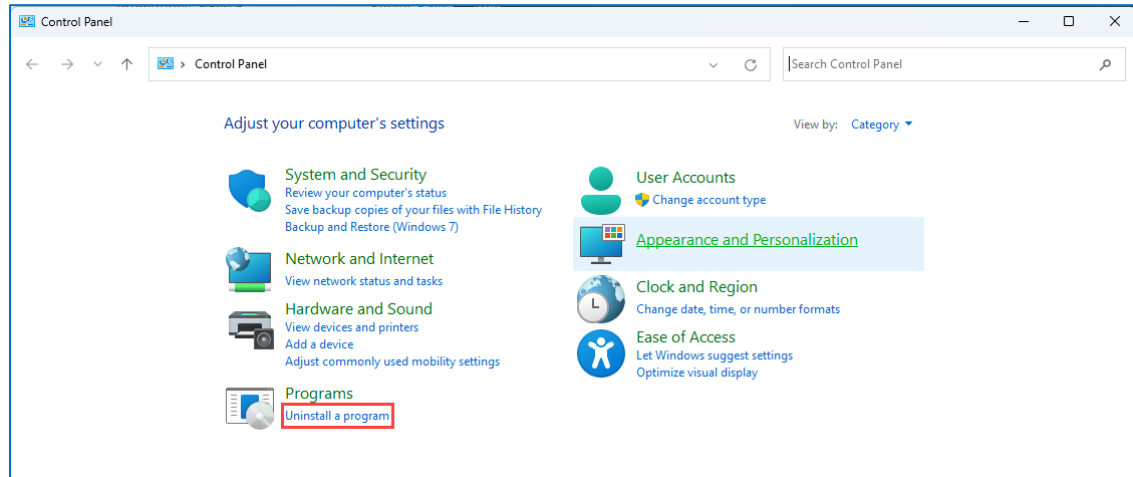
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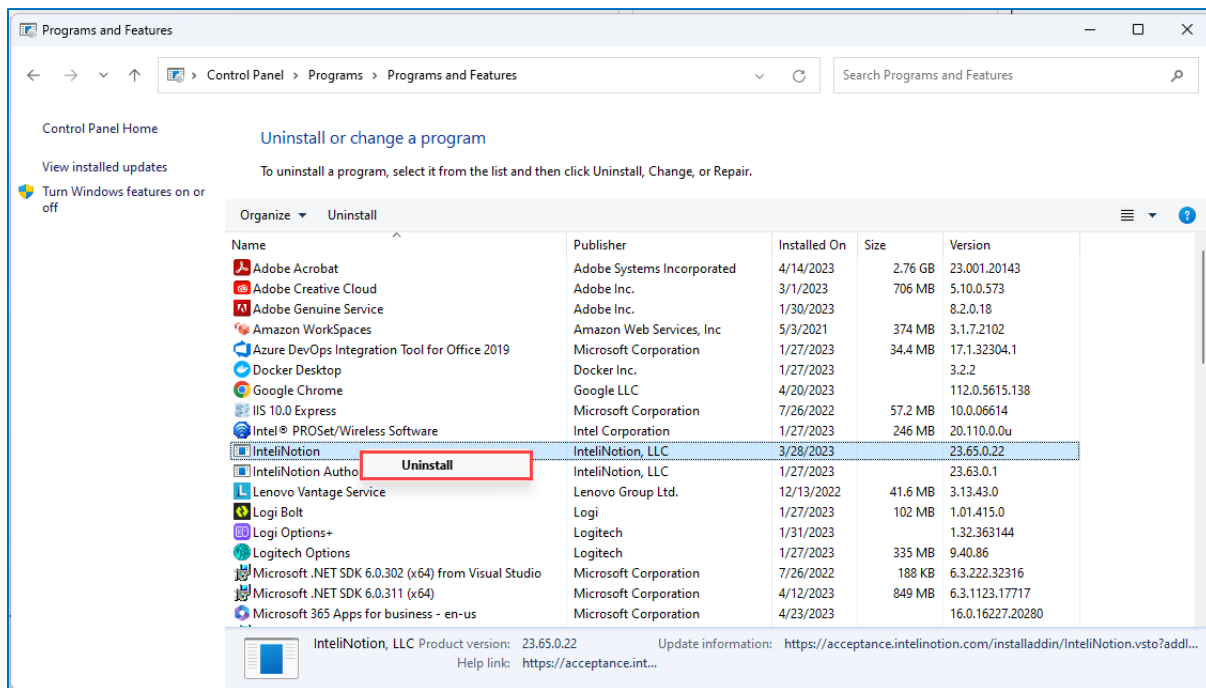
4. UNINSTALLING THE INTELINOTION MS WORD APP

To uninstall the *InteliNotion Word app*, follow the instructions listed below.

1. Navigate to the computer's Control Panel and click on **Uninstall a program**.



2. The **Programs and Features** window will display. Right click on **InteliNotion** and **InteliNotion Authoring Tools** and click **Uninstall**.



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