User Guide Module 3: General InteliNotion Usage

For InteliNotion Version: 2024.GR2.0
Last Modified: November 2024

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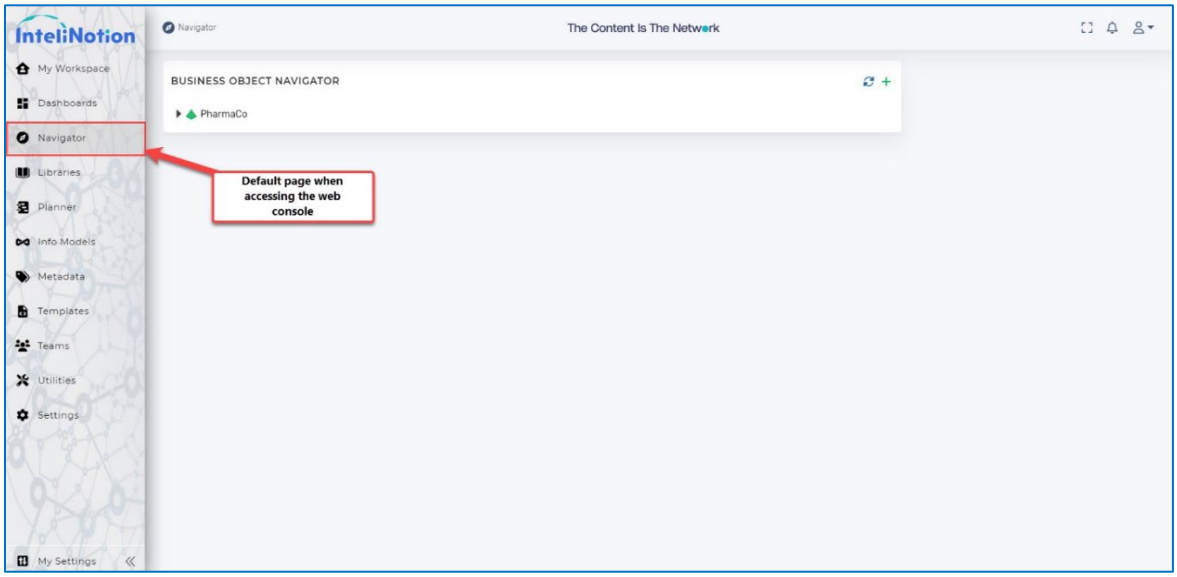
1. GENERAL GUIDELINES

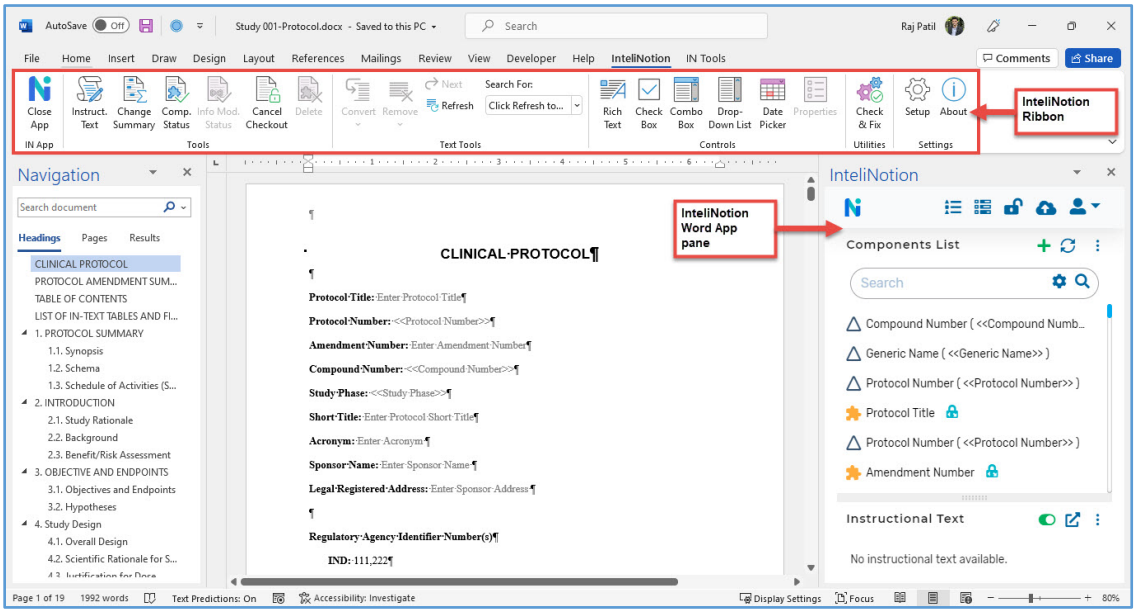
There are 2 user interfaces for *InteliNotion*:

- *Web Console*



> **Note:** The configuration of the menu on the *Web Console* will vary depending on the user's permissions.

- *InteliNotion Word App*



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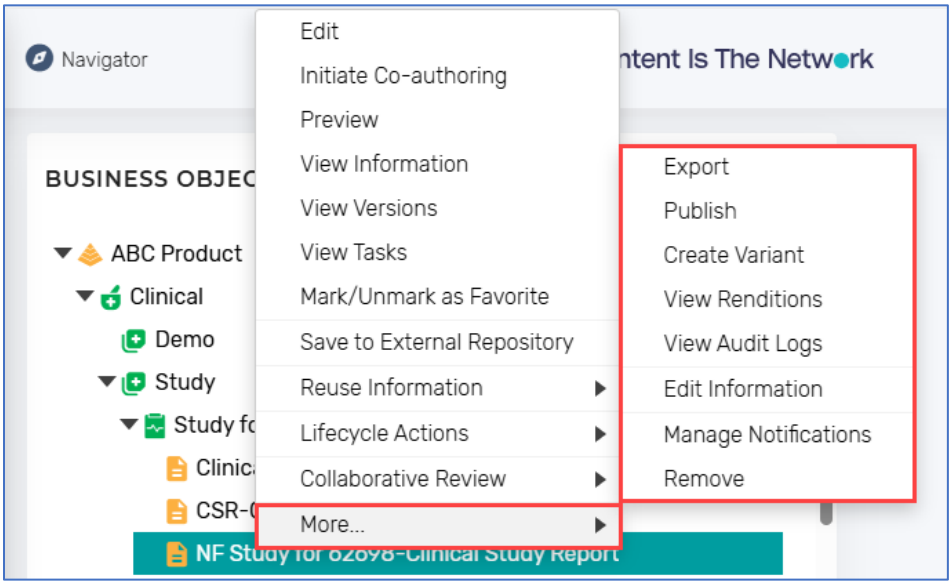
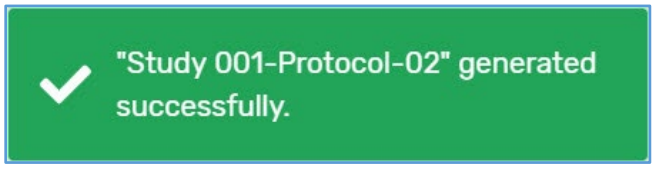
Here are some general functionalities to consider when using the *Web Console* and/or *InteliNotion Word App*:

1. To access the main menu associated with a business object, follow **one** of the two steps listed below:
   a. Right-click on the business object name
   b. Click on the **vertical ellipsis** ⋮ beside the business object name, if available.
2. Sub-menus may be accessed by hovering over a main menu action that includes a right-facing arrow.



3. After any action that demands confirmation (eg, document generation, co-authoring initiation, etc.) is completed, a confirmation message like the example below will display.



> **Note:** If the action is not successful, the system will display a relevant error message.

4. If not already launched, the *InteliNotion Word App* will open automatically when a document is opened from the *Web Console*.
   - If the app is closed while single or co-authoring on a document, it will have to be manually reopened via the **Open App** command in the IN ribbon.

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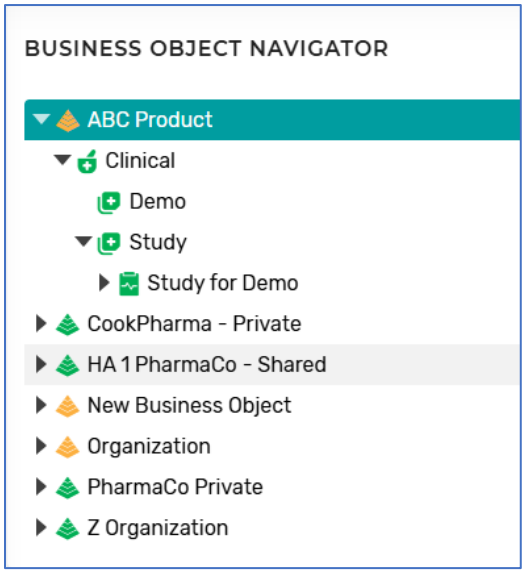
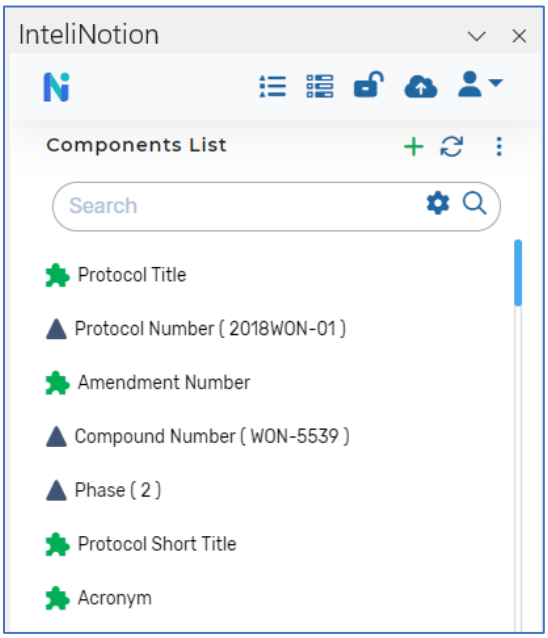
5. When the document opens, the **Navigator** view will be opened by default in the *InteliNotion Word App*.



- To access the list of components in an open document, click on the **Components List icon** .
  - This view can also be accessed by clicking on the **vertical ellipsis** and choosing **Components List.**



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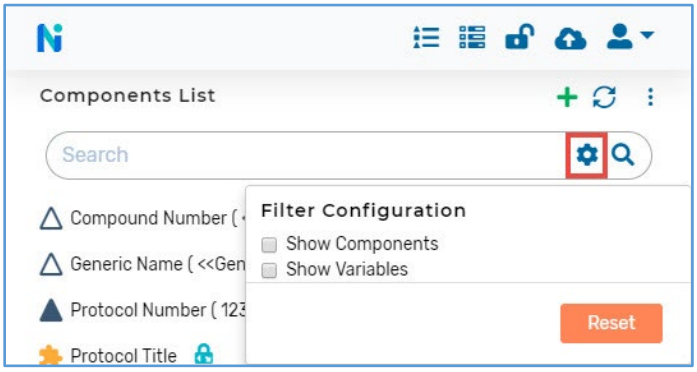
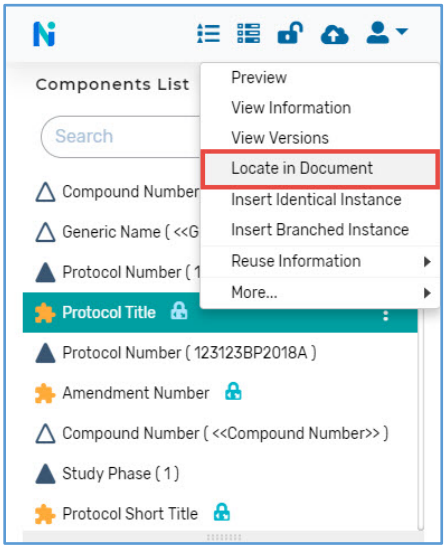
- If needed, click the **Search Configuration** button (**gear icon**) to filter the list to show components or variables only. (Refer to Module 5 for more information about components and variables.)



- For every component or variable in the Components List there is a **vertical ellipsis** . Click on it and select **Locate in Document** to move the cursor to that particular item within the document.



- The **My tasks icon** will display any active tasks assigned to the user.
- The **Cancel checkout icon** is used to cancel checkout of the document; any unsaved edits will be discarded, and the document will be closed.
- The (cloud) **Save document** icon allows a user to save the changes made in the document to the system. Note that saving the document locally to its temp location (eg, before closing the document) will not save the changes to the system; the **Save Document** icon (or **Save Doc** button in the *InteliNotion* ribbon) must be used to save

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changes to the system (which creates a new version of the document and relevant components).

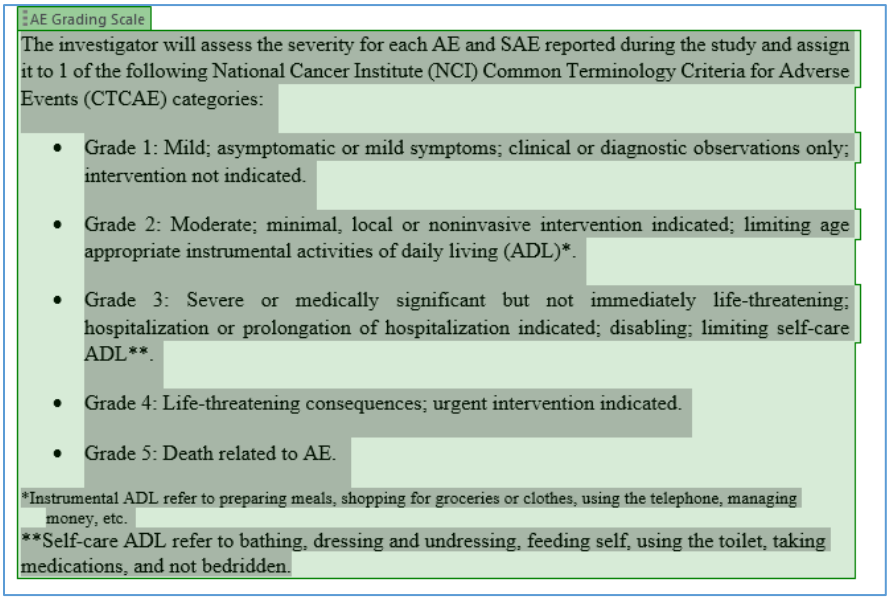
- Click on the **User** settings icon to access user settings (see Section 2.2).

6. Click on the **Navigator icon** to quickly return to the Navigator view.

- If needed, click the **Refresh word application** icon to refresh the *InteliNotion Word App*.

- If needed, click the **vertical ellipsis** to see a menu of other views available based on the user's role/permissions in the system. (Use of these other views and functions will be covered separately in an applicable section of the guide.)

7. While authoring a document in *MS Word*, a green highlight on a component indicates that its content is locked for editing (either because it has an **As Is** reuse policy applied or is an **Approved**-type state).



Note: See the **InteliNotion Terminology and Icons** guide for a list of commonly used terminology and icons used within the various InteliNotion guides and system itself.

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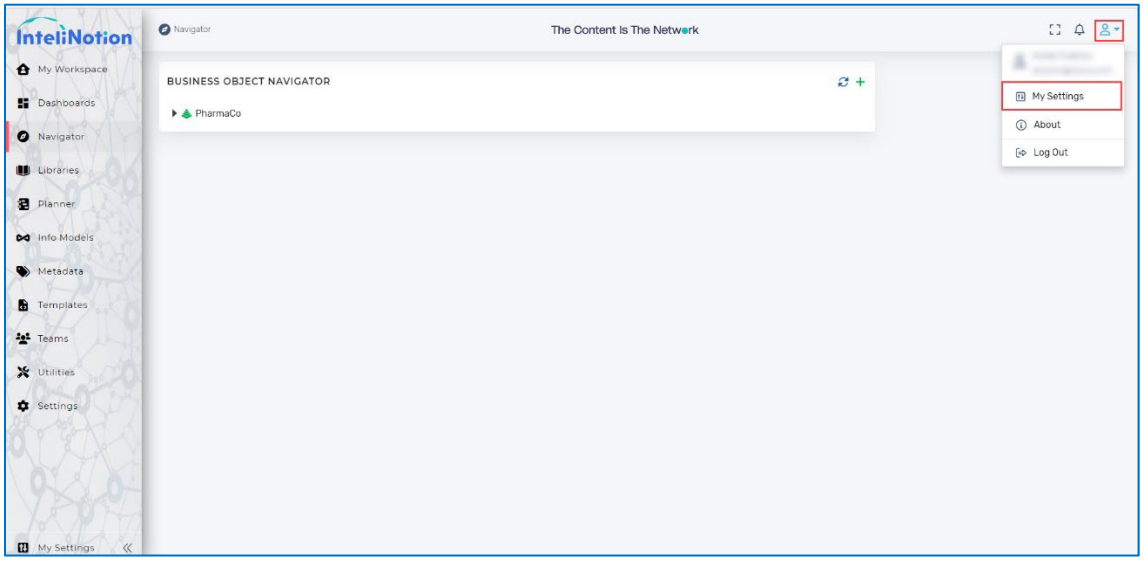
2. USER SETTINGS

Under this section in the *Web Console*, the user can customize the view, look, and feel of the *Web Console* and create personal widgets for quick access.

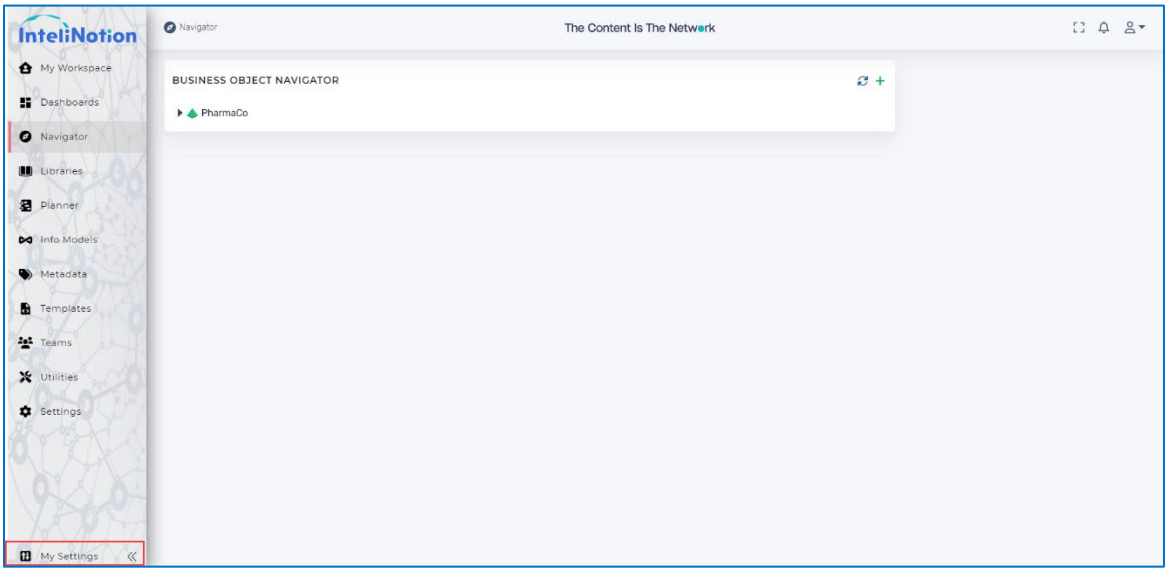
2.1 ACCESSING USER SETTINGS

User Settings can be accessed in the *Web Console* in a few ways:

- Option 1: Click on the **user icon** and click **My Settings** in the dropdown menu.



- Option 2: Click on **My Settings** at the bottom of the left-hand navigation pane.



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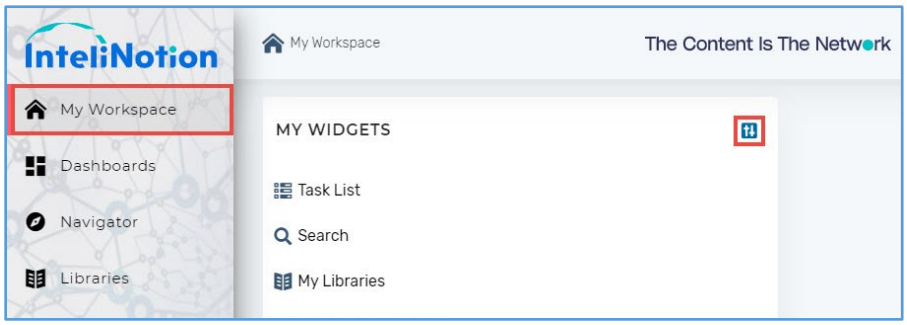
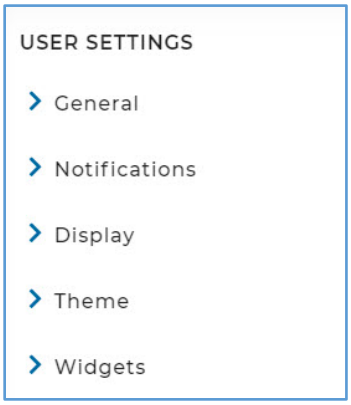
- Option 3: Click on **My Workspace** at the top of the left-hand navigation pane, then click the **Widget Settings** option.



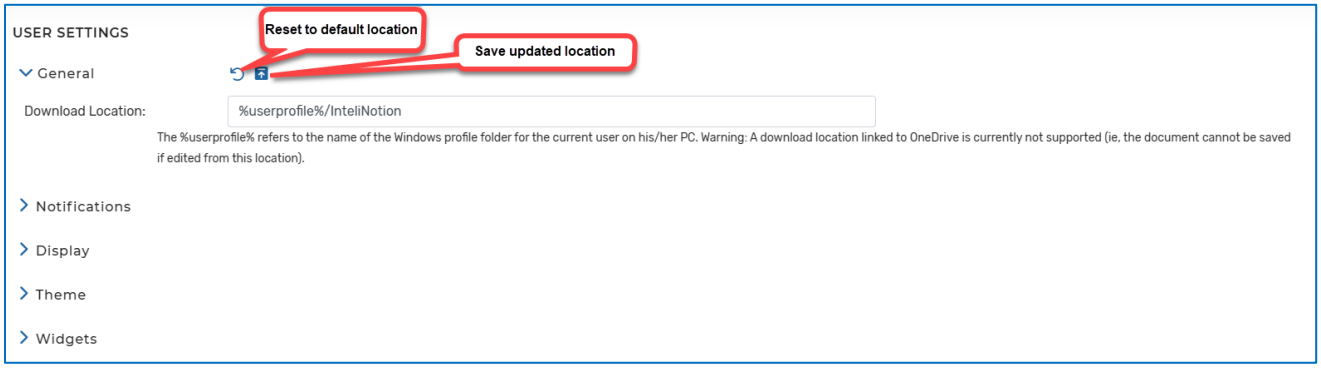
2.2 CONFIGURING USER SETTINGS

The following setting types can be configured within **User Settings** by clicking **My Settings** in the left-hand navigation menu:



2.2.1 General

A user can change the **Download Location** where all the *InteliNotion* documents are stored temporarily while checked out. A default location (as shown below) is used when the *InteliNotion Word App* is installed.



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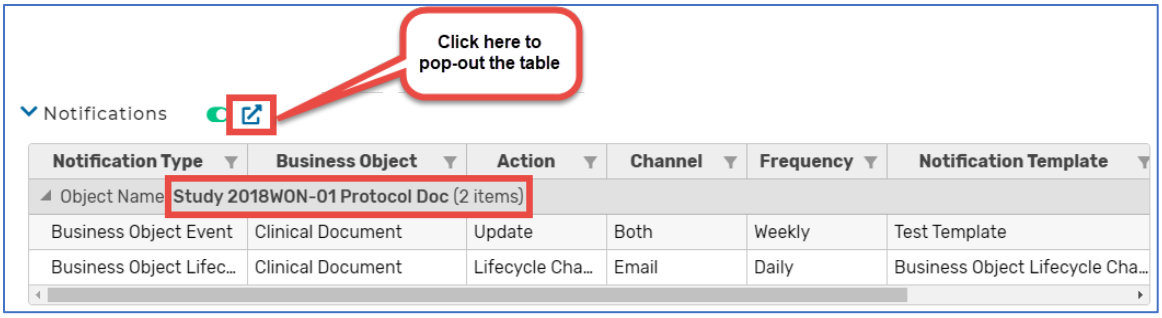
2.2.2 Notifications

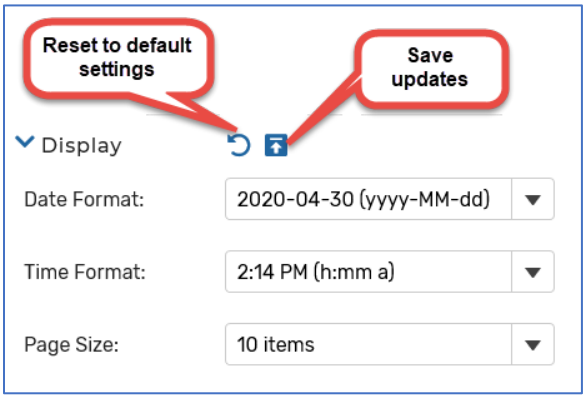
A user can manage any self-subscribed notifications. See Module 12 for details on how to add these notifications.



2.2.3 Display

A user can customize date-time formats and page sizing in the *Web Console* and the *InteliNotion Word App* as follows:

- **Date Format -** Select from the available date formats
- **Time Format -** Select from the available time formats
- **Page Size -** Select paging size from the available options



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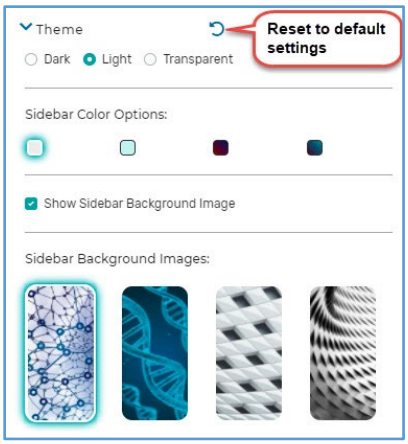
2.2.4 Theme

A user can select the theme, sidebar color, and sidebar background to change the default look and feel of the *Web Console*.



2.2.5 Widgets

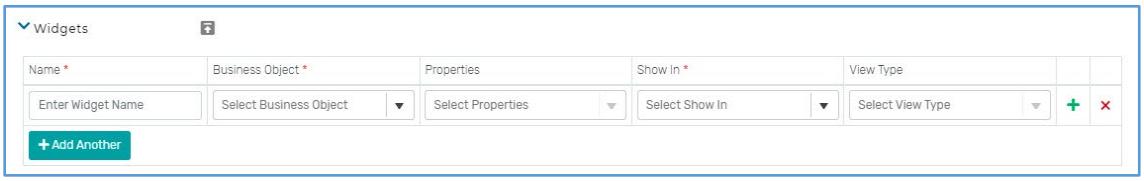
A user can create a personal widget(s) for easy access to any business object (eg, documents checked out to the user) in the *Web Console* as well as the *InteliNotion Word App*. The widget can be accessed via the *Web Console* and the *InteliNotion Word App* based on the widget's configuration.

> **Note:** To complete the functions listed in the subsections below, a user must have permission to access and create widgets configured by the administrator.

2.2.5.1 Creating a Widget

To create a widget, follow the steps listed below.

1. **Name -** Enter a name for the widget
2. **Business Object -** Select the type of business object for the widget
3. **Properties -** Select the properties of the selected business object type which will be displayed in the short view under the widget
4. **Shown In -** Select if the widget should be accessible via the *Web Console* and/or *InteliNotion Word App*
5. **View Type** - Select a view type



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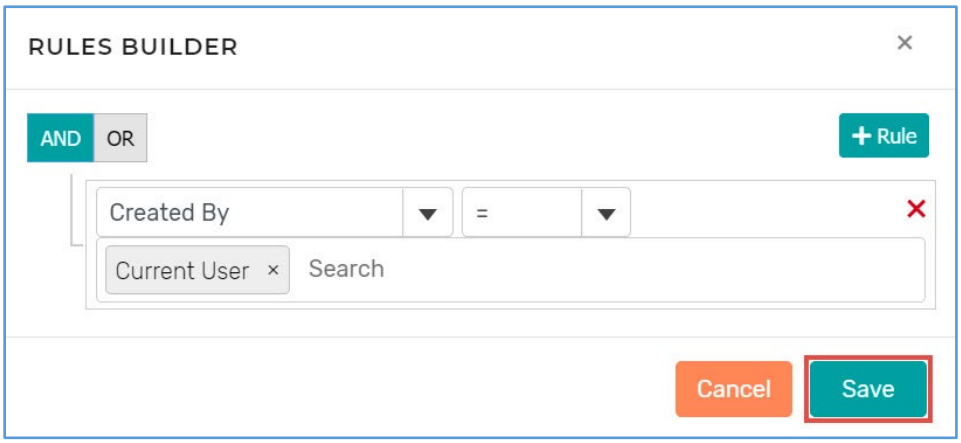
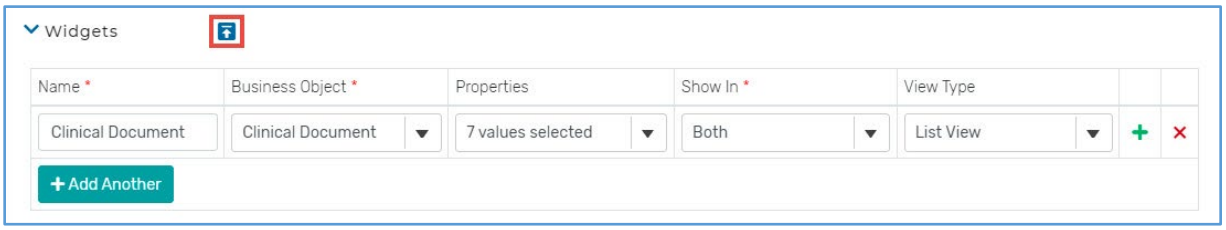
> **Note:** Currently, the system only supports **List View** for a widget accessible via the *InteliNotion Word App*.

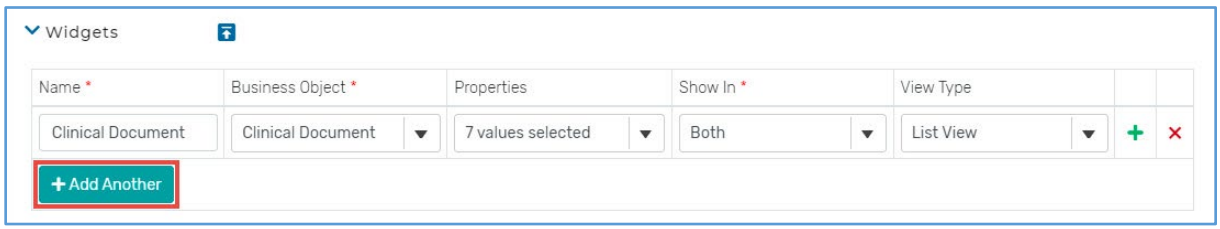
6. **Rule** - Click on the **green plus icon** + to create a rule using the **Rules Builder**. This will add a filter based on the selected business object's property.



7. Once all widget settings have been selected, click **Save**.



8. To add another widget, click **Add Another** and follow steps 1-7 until all desired widgets have been added.



> **Note:** After adding any new widgets, always be sure to click on the **save icon** .

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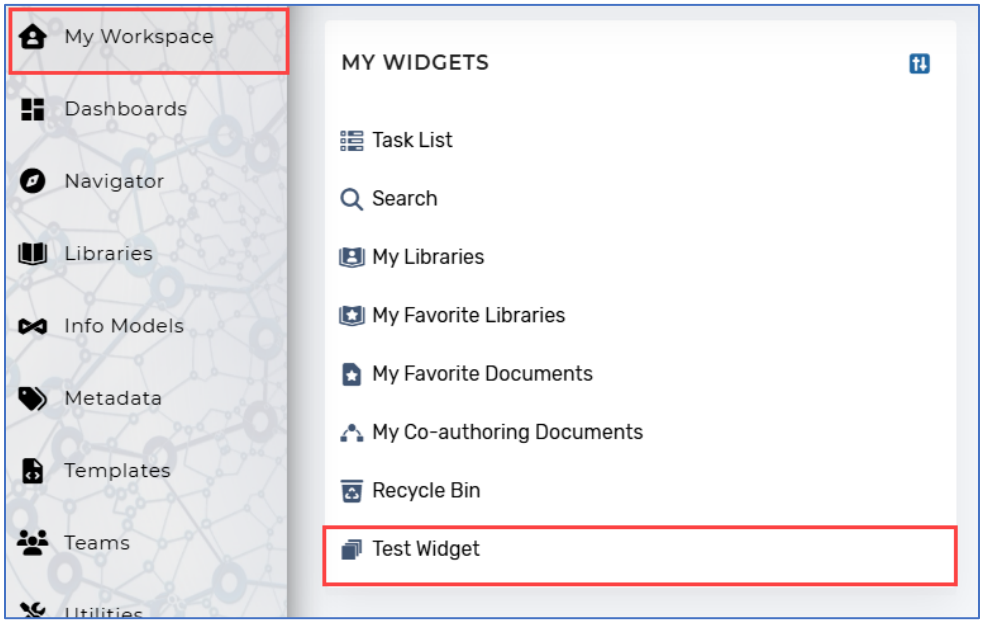
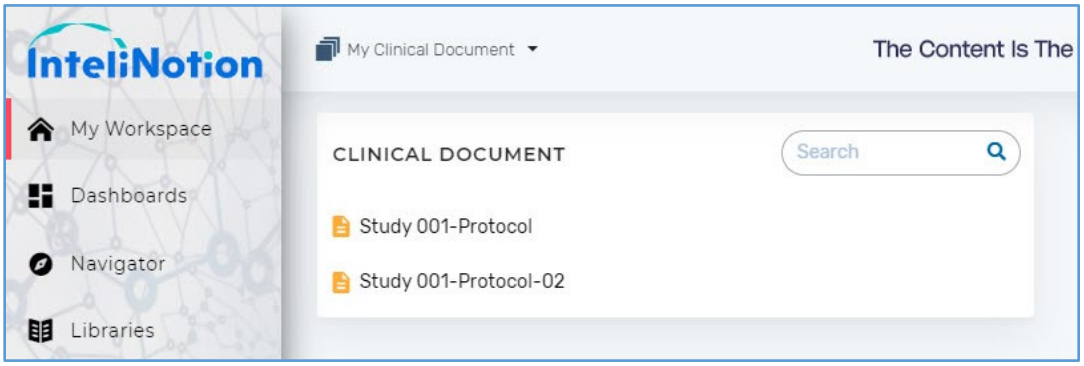
2.2.5.2 Accessing a Widget

Accessing a widget can be accomplished in two ways:

1. Via the Web Console
    a. In the left-hand navigation pane, click **My Workspace**. The user-configured widgets list appears at the bottom of all the system provided options below the **Recycle Bin** tab:



    b. The related documents/items from the widget are displayed in a list view.



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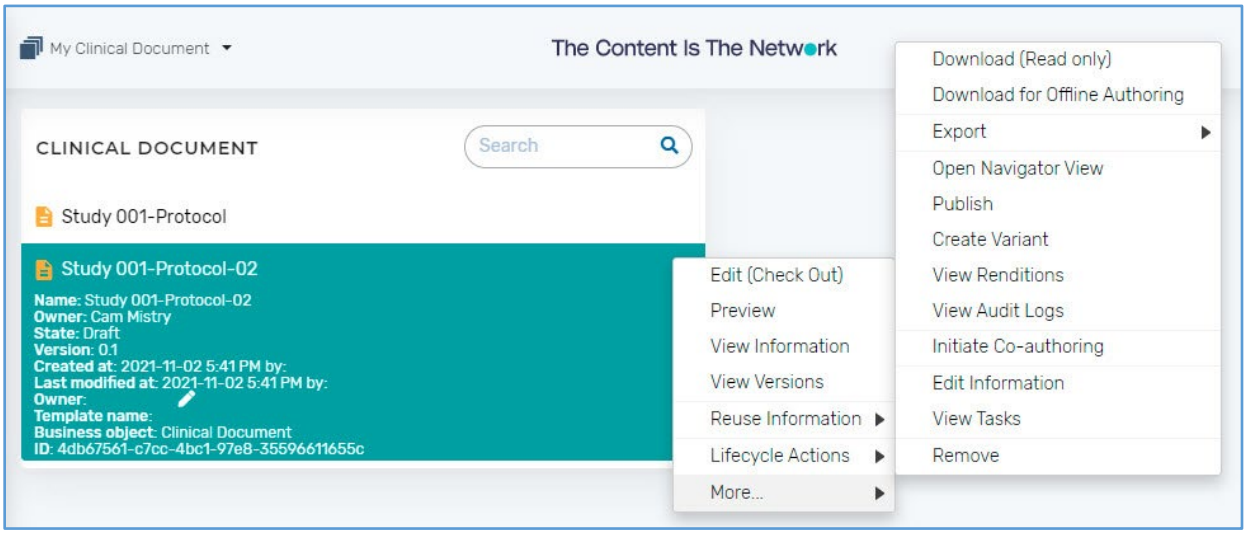
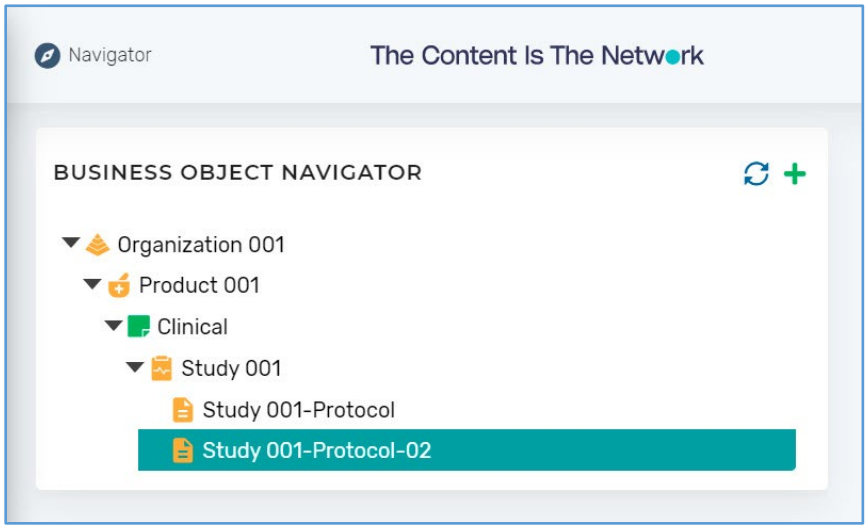
c. Click the **vertical ellipsis** ⋮ and choose **More** from the list of options.



d. Choose **Open Navigator View** to locate the document.



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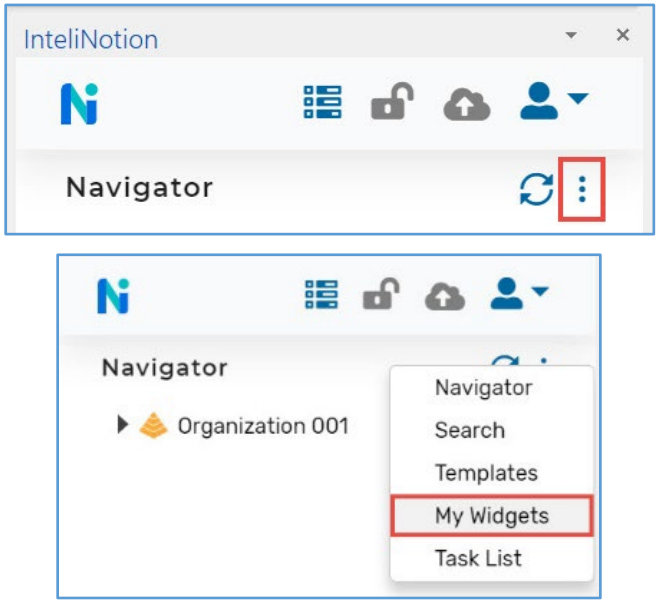
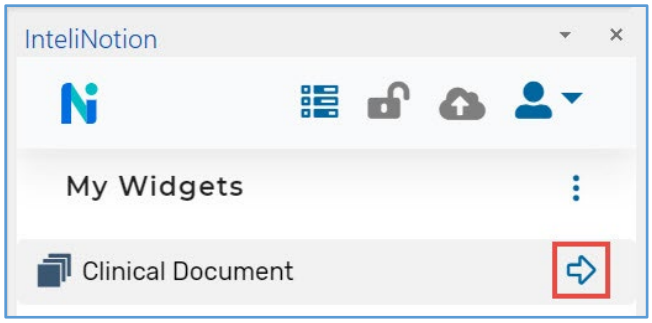
2. Via *InteliNotion Word App*

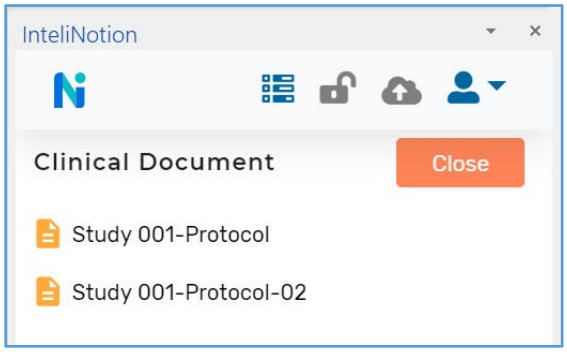
   a. Click the **vertical ellipsis** ⋮ and then click **My Widgets**. ***Only*** user-configured widgets are included in this view.



   b. Click on the arrow to access the widgets.



   c. The related documents/items from the widget display in a list view.



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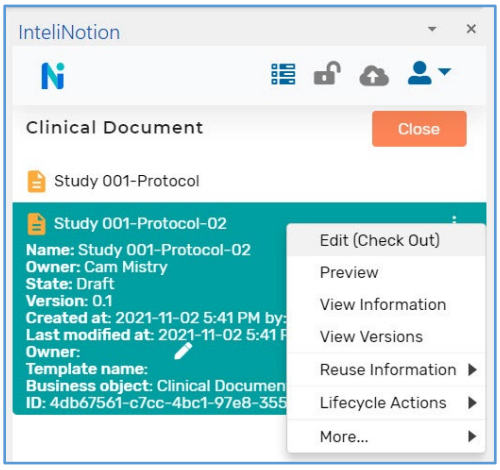
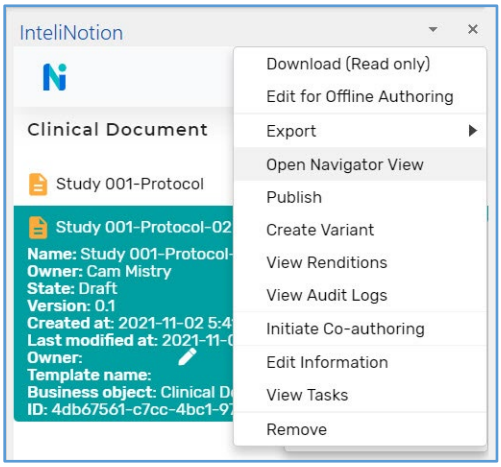
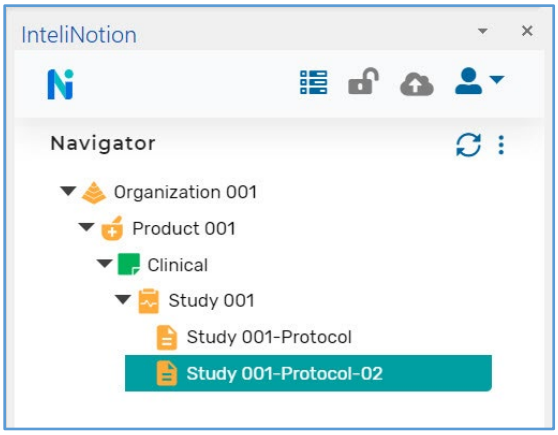
d. Click the **vertical ellipsis** and choose **More** from the list of options.



e. Choose **Open Navigator View** to locate the document.



f. The document is displayed.



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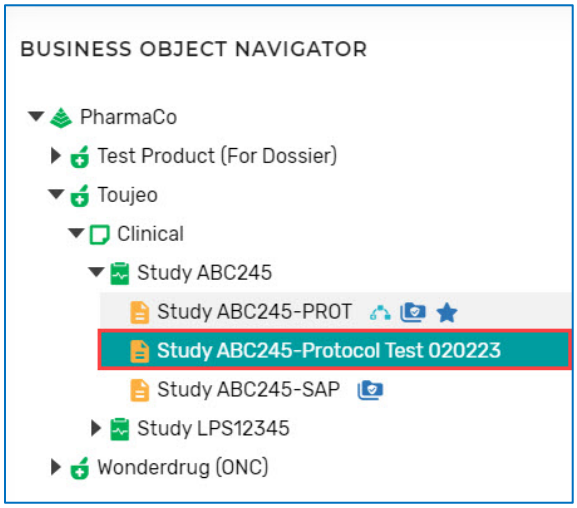
2.2.6 Favorites

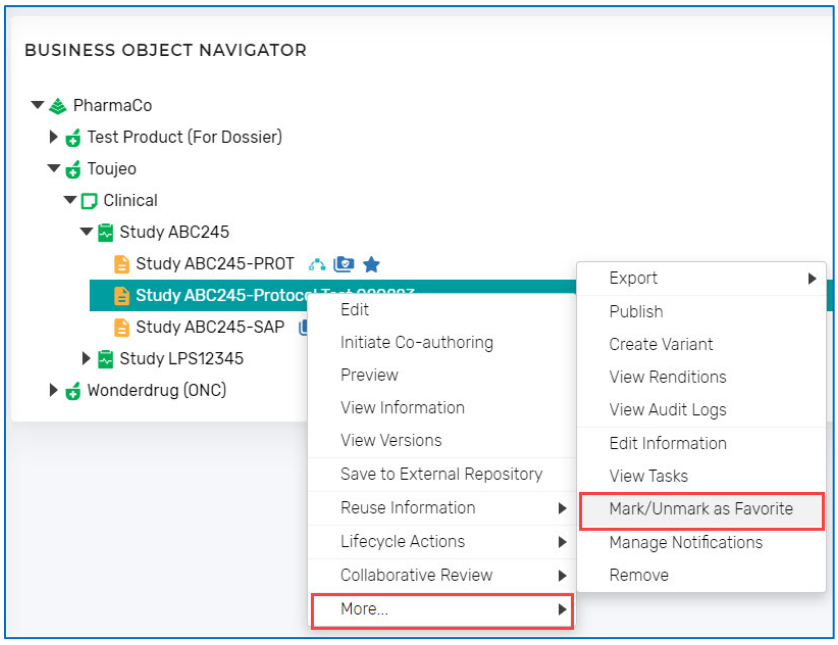
To mark and object as a favorite, follow the steps listed below.

> **Note:** To complete the functions listed below, a user must have permission to access and create favorites configured by the administrator.

1. Click on **Navigator** in the left-hand menu. Navigate to the business object to be marked as a favorite.



2. Right click on the applicable object, hover over More, and click Mark/Unmark as favorite.



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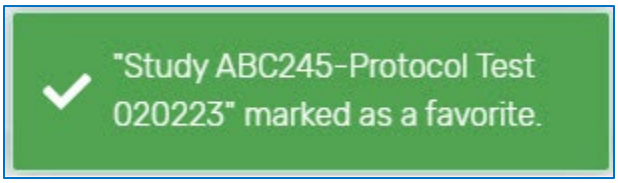
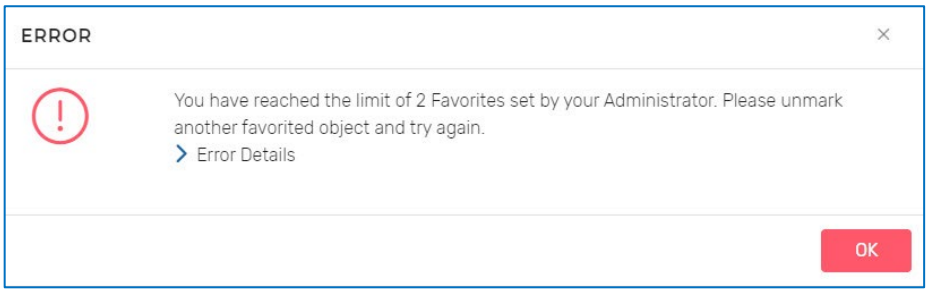
3. A pop-up confirming that the object was successfully marked as a favorite will display.



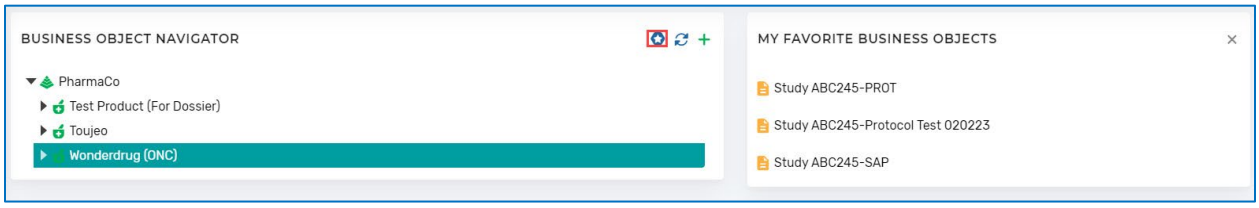
Note: If the system configured number of favorite objects has been exceeded, the following error message will display:



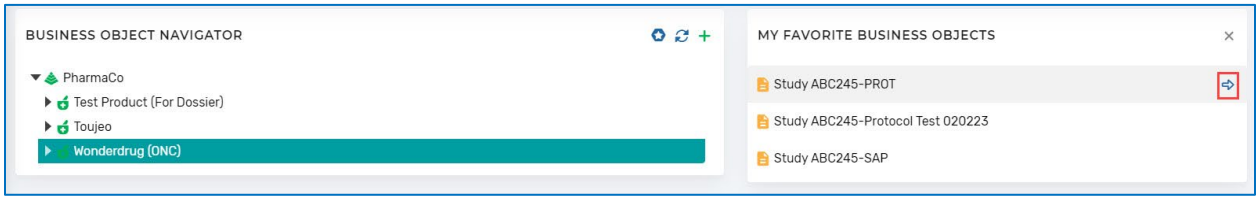
2.2.6.1 Viewing Favorite Objects

Once an object has been marked as a favorite, it can be viewed from both the *InteliNotion Web Console* and the *InteliNotion Word App*. Follow either of the two sets of steps listed below to view favorite objects.

1. In the Navigator, click on the **My Favorites** icon . The **My Favorite Business Objects** form will display.



2. To navigate to a favorited object, hover over the applicable object, and click on the right arrow icon , or double click on the applicable object.



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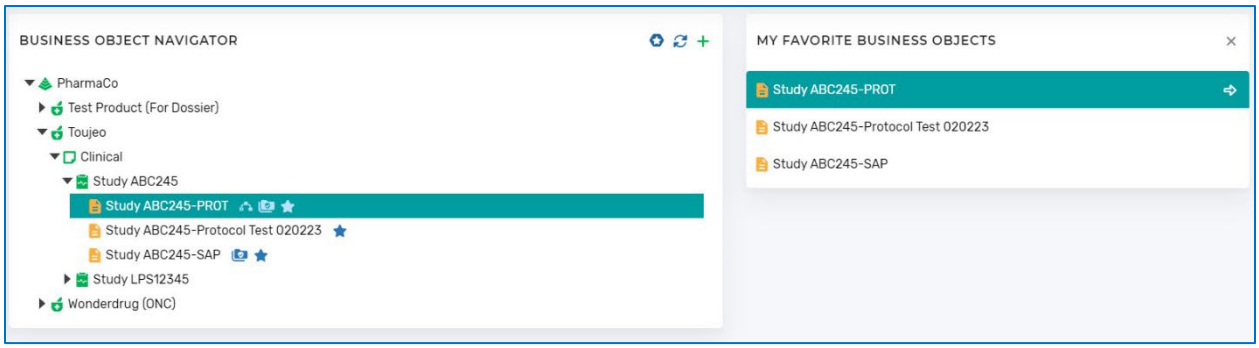
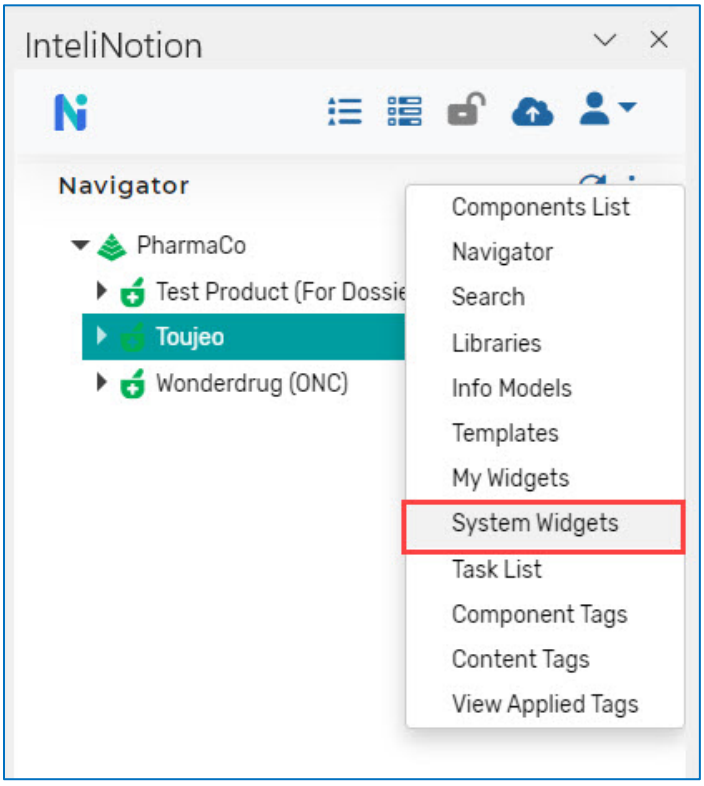
3. The object will display, selected in the Business Object Navigator.



OR

1. In the *InteliNotion Word App*, click the ellipses and select **System Widgets**.



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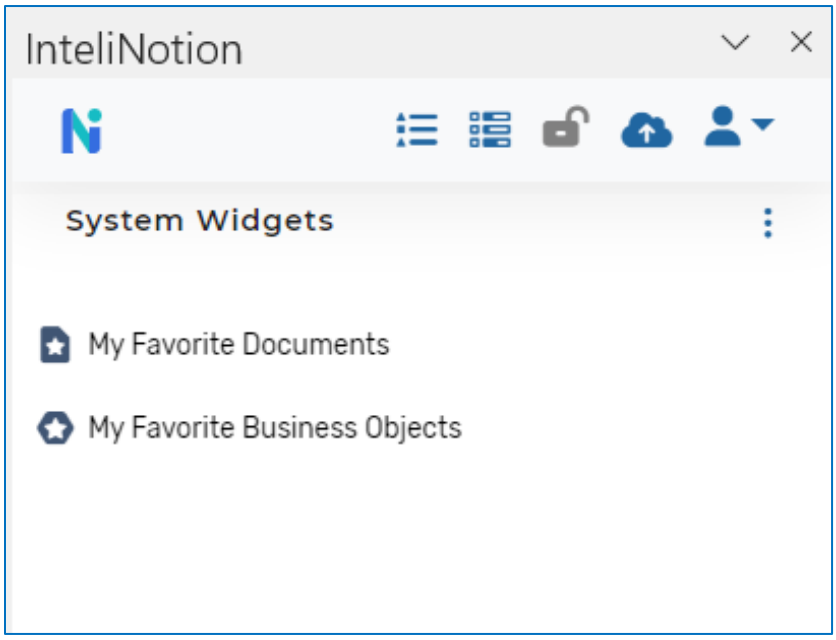
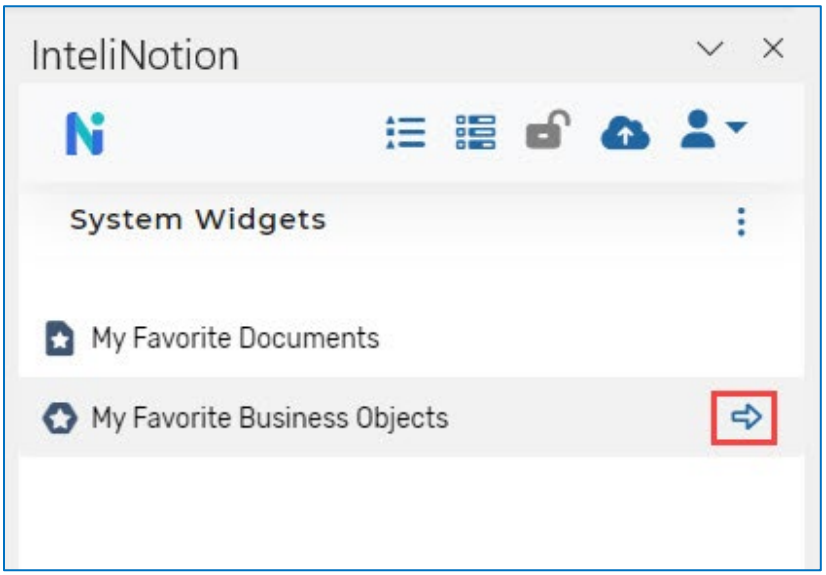
2. The **System Widgets** form will display.



3. Hover over either **My Favorite Documents** or **My Favorite Business Objects**, as applicable, and click on the right arrow icon or double click on the applicable area.



Note: **My Favorite Documents** only displays document objects, while **My Favorite Business Objects** displays all favorited business objects.

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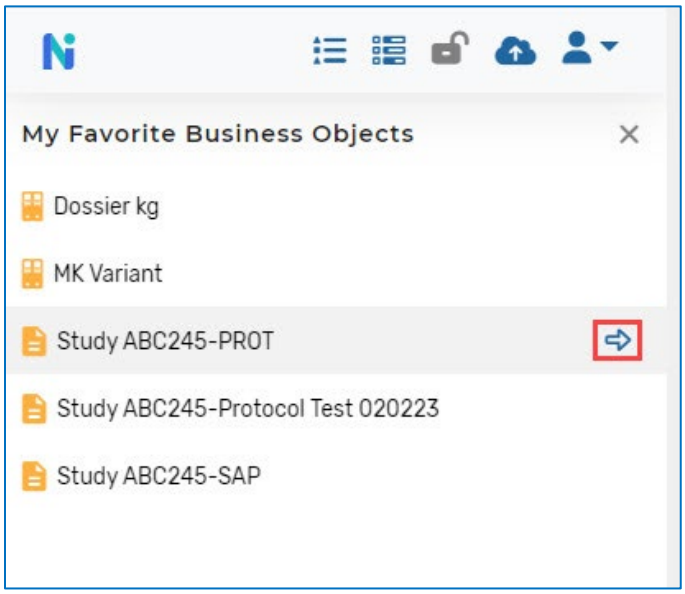
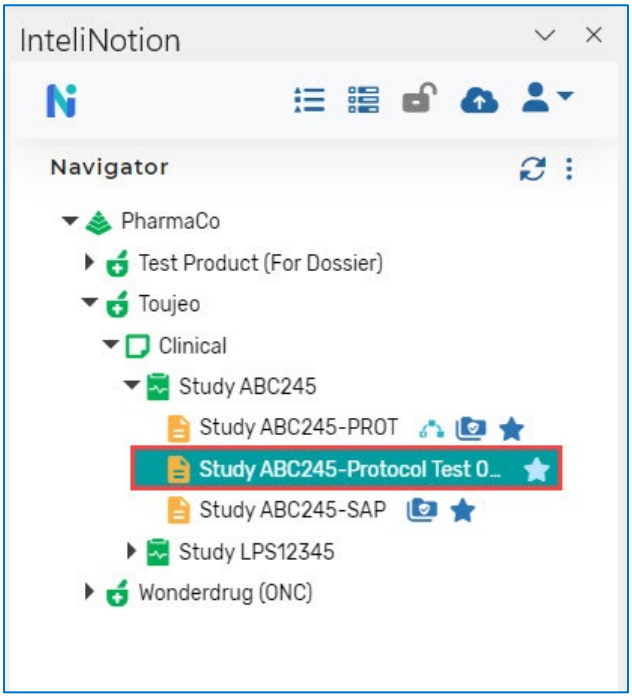
4. Once in the applicable area, hover over the favorite object to be located and click the right arrow icon , or double click the applicable object.



5. The Navigator will display with the favorite object selected.



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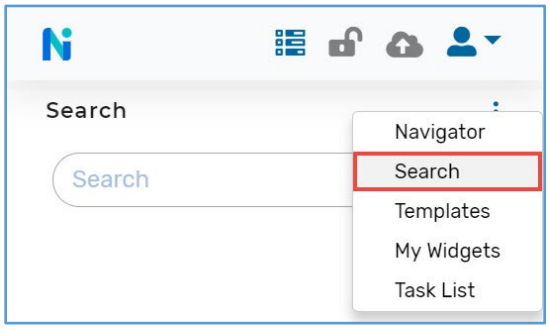
3. SEARCHING VIA WEB CONSOLE

The **Search** feature of the *Web Console* allows a user to search for any object (eg, document, component) and filter by its properties, based on the search configuration set by the admin.

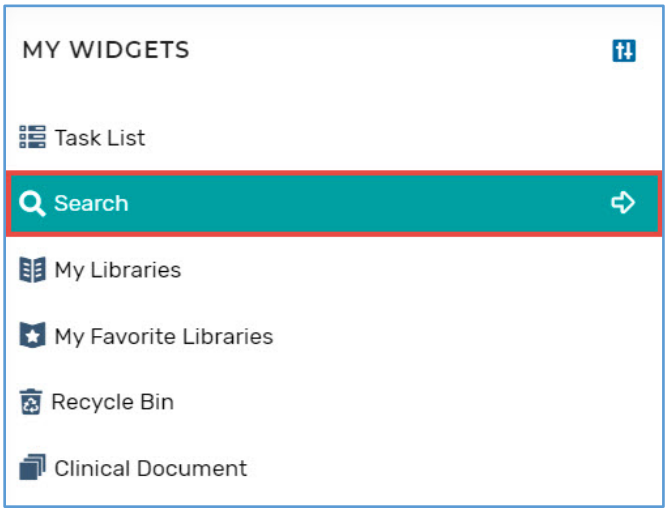
Notes:

- To complete the functions listed in the subsections below, a user must have permission to access the search function in the *Web Console* configured by the administrator.
- There is also a **Search** feature available in the *InteliNotion Word App* (use the **vertical ellipsis** ⋮ to access it), but it does not include the ability to apply filtering beyond selecting business objects and libraries.



3.1 NAVIGATING TO SEARCH

1. In the *Web Console*, click **My Workspace** in the left-hand navigation pane.
2. Double-click on the **Search** option.



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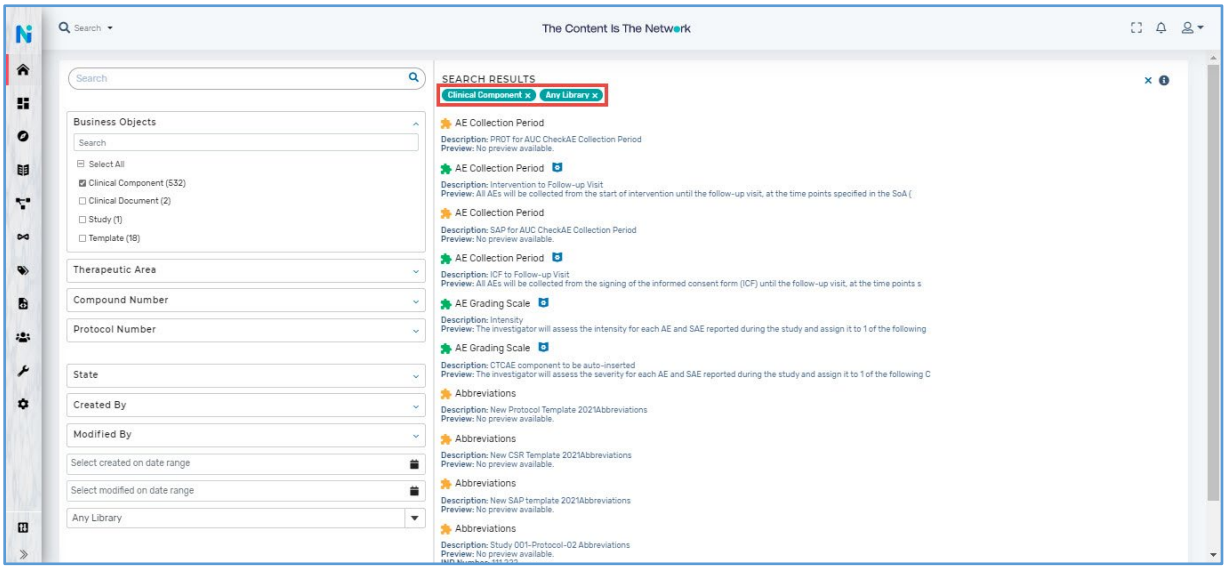
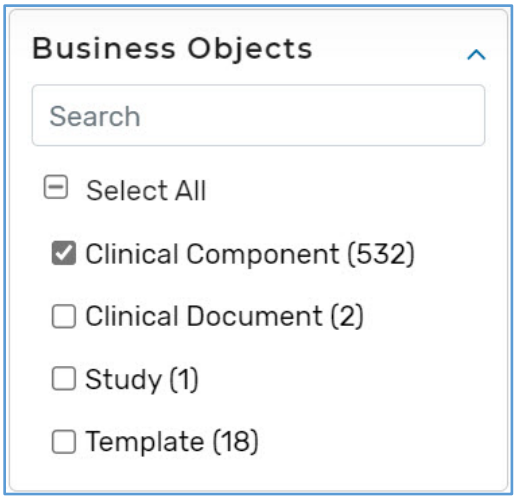
3. The search form with available filters will open. The **Library** filter is set to **Any Library**, which means that all libraries configured to allow for searching against the selected business object types are included.



3.2 VIEWING SEARCH FILTER OPTIONS

1. All the business objects configured as searchable by the admin are listed under the **Business Objects** filter on the left-hand side.



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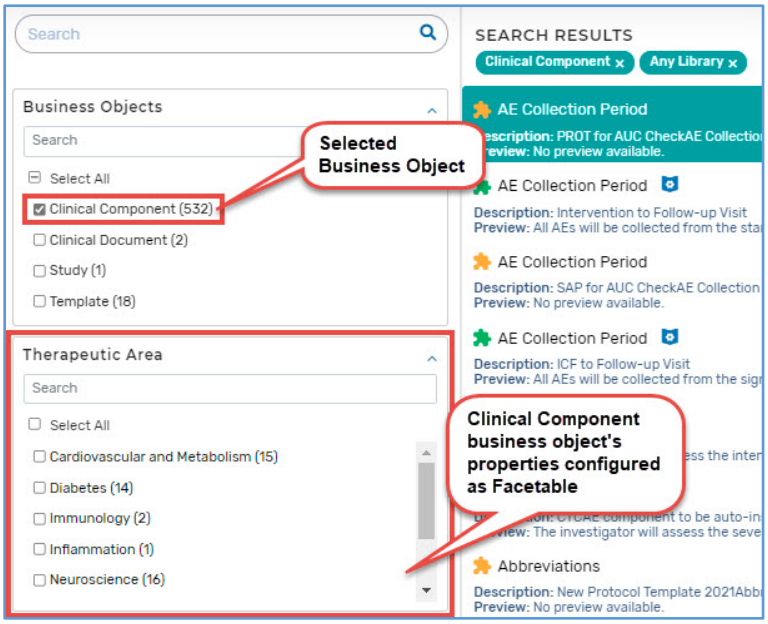
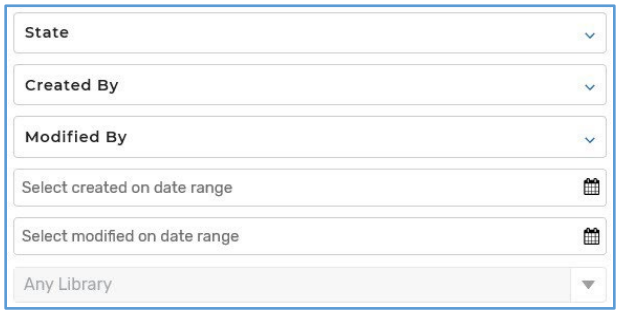
2. Related properties of the business objects selected above, which are also configured as **Faceted** (ie, may be used as a filter) by the admin, dynamically change based on the selection of the business objects and are listed below the **Business Objects** filter.



3. Additional filters for system-generated properties are also available, including:
   - **State** - To select and apply a lifecycle state filter when searching for the business objects
   - **Created By** - To select specific users who have created the business objects
   - **Modified By** - To select specific users who have modified the business objects
   - **Select created on date range** - To select a date range to filter the business objects which have been created during a particular time frame
   - **Select modified on date range** - To select a date range to filter the business objects which have been modified during a particular time frame
   - **Any Library** - To select a specific library, if configured to allow searching against, for the business objects. This filter is enabled only if a single business object is selected



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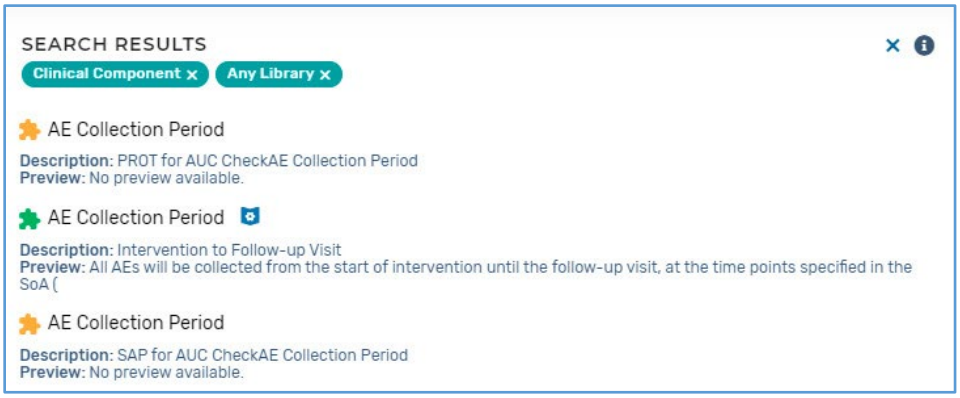
3.3 EXECUTING A SEARCH

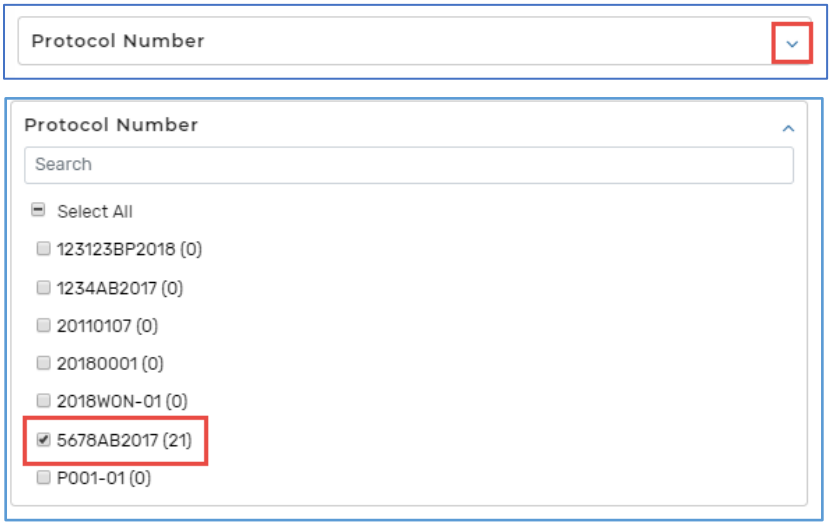
1. To search by keyword, enter the appropriate text into the **Search** box and click on the **magnifying glass icon** to execute the search.

> **Note:** The user can use an asterisk (*) for wildcard matches on partial text.

2. Matching results will appear on the right-hand side.



3. To apply an available filter, click the arrow to expand the list of values, and select the appropriate ones. The list of matching results immediately refreshes.



> **Note:** The search result numbers shown parenthetically are approximate values; the actual counts may vary depending on the user's level of permission in the system.

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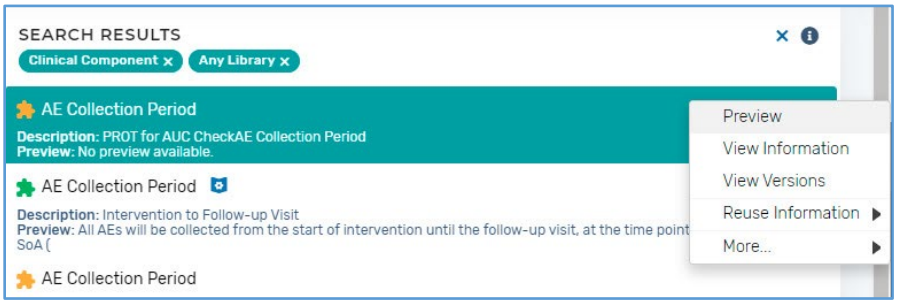
4. Click the **vertical ellipsis** ⋮ to the right of a search result to view available actions.



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