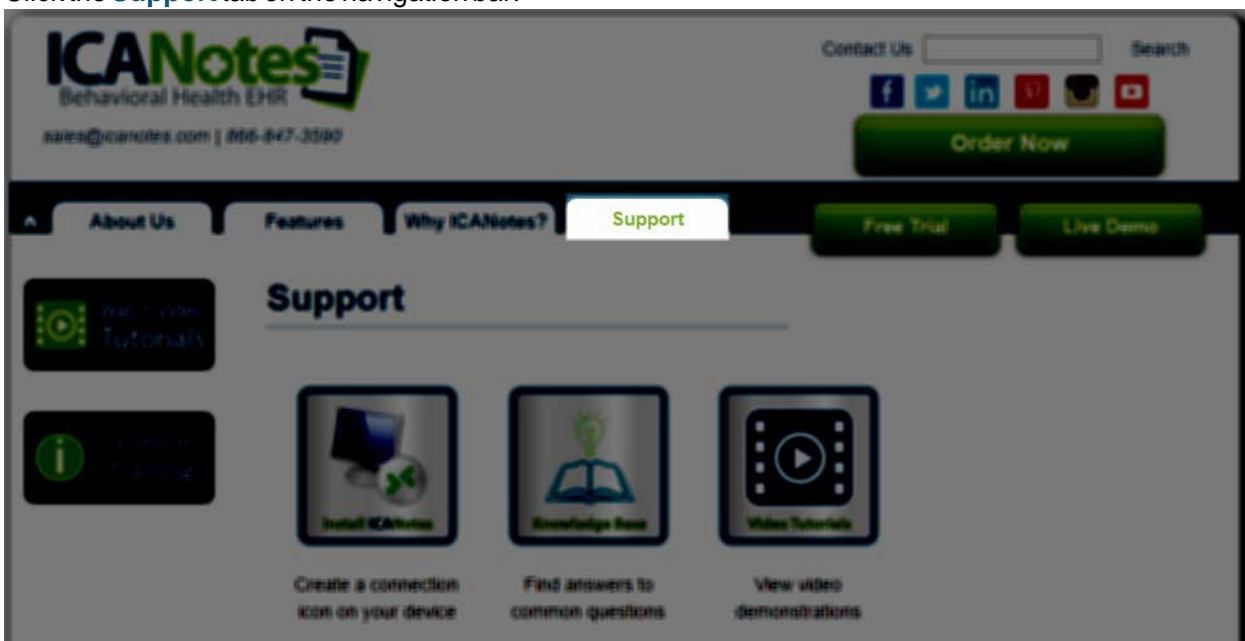# Installing ICANotes

Contents

INSTALLING ICANOTES (WINDOWS)

Video Tutorial
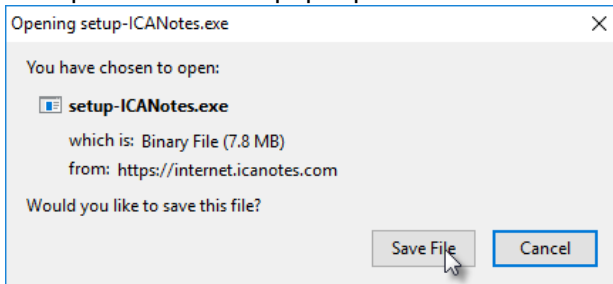Windows Login Process

- Type www.icanotes.com in your browser's address bar.

- Click the **Support** tab on the navigation bar.

- Click the icon.

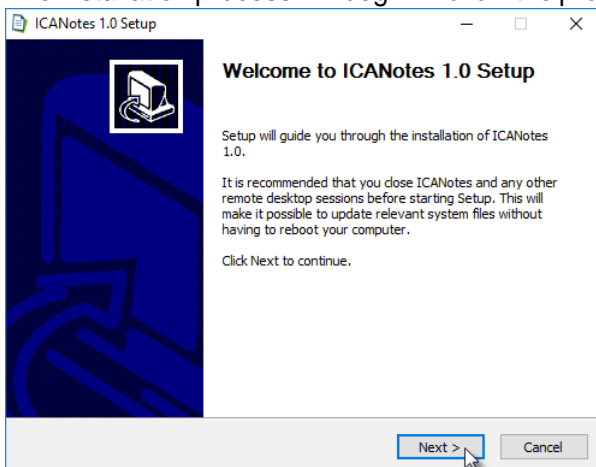- Follow the instructions in the left column. Follow step one to download a shortcut icon, as illustrated below.

Install ICANotes

Windows Instructions

Video Tutorial
Windows Login Process

1. Download and install setup-ICANotes.exe by clicking **HERE**
2. An icon for ICANotes will appear on your desktop:

- The option to Save File pops up. Click **Save File**.

Opening setup-ICANotes.exe

You have chosen to open:

  setup-ICANotes.exe
    which is: Binary File (7.8 MB)
    from: https://internet.icanotes.com

Would you like to save this file?

Save File   Cancel

- After saving your file, click CTRL + J to pull up your recent download window. (Or, click the ⬇ in the top right of your web browser.) Find the setup-ICANotes.exe file and double click.


setup-ICANotes(3).exe
7.8 MB — icanotes.com — 10:59 AM

Show All Downloads
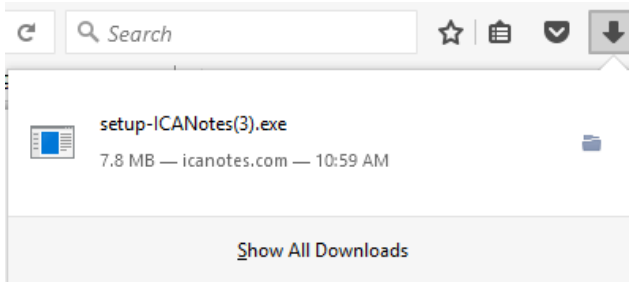
- You may receive a response from Windows (User Account Control) asking if you want to allow this app to make changes to your PC. Select Yes.

- The installation process will begin. Follow the prompts to complete the installation.

ICANotes 1.0 Setup

Welcome to ICANotes 1.0 Setup

Setup will guide you through the installation of ICANotes 1.0.

It is recommended that you close ICANotes and any other remote desktop sessions before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.

Click Next to continue.

Next >   Cancel

Installing ICANotes

> **Important: You will be asked if you would like to install Screwdrivers by Tricerat. The Screwdrivers program is required for printing in ICANotes on a Windows computer. When prompted, be sure to click the** `Yes` **button.**
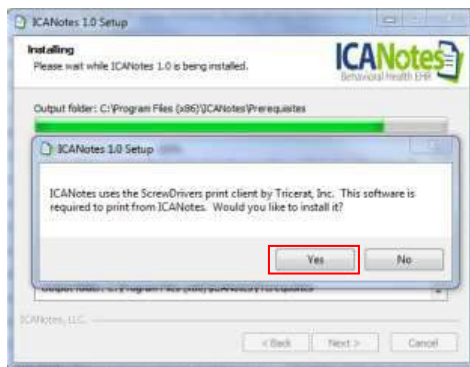

- The popup window shown below indicates that the installation process has finished and an ICANotes icon has been placed on your desktop.
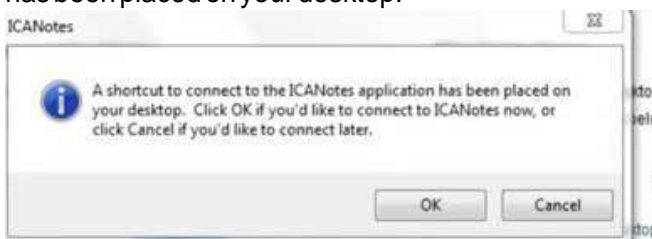

- Find the icon on your desktop that looks like the one pictured below and double-click to open it. If you experience a certificate error, please see the Windows Connection Troubleshooting section to resolve.
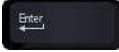

- You may see the following **Remote Desktop Connection** pop-up window displayed after you have double clicked on the ICANotes icon. Click 'Don't ask me again for connections to this computer', and then click the `Connect` option.
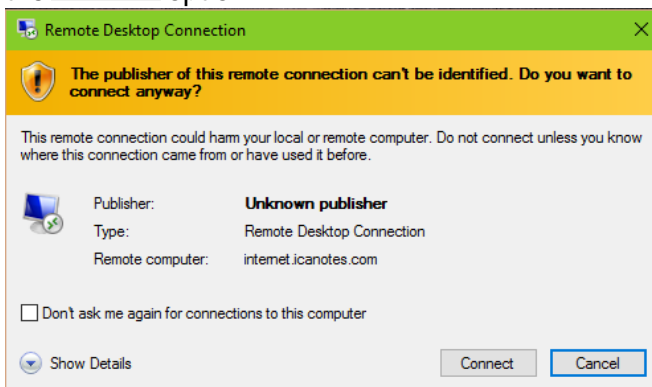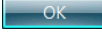

- You will be prompted to enter your credentials to login.
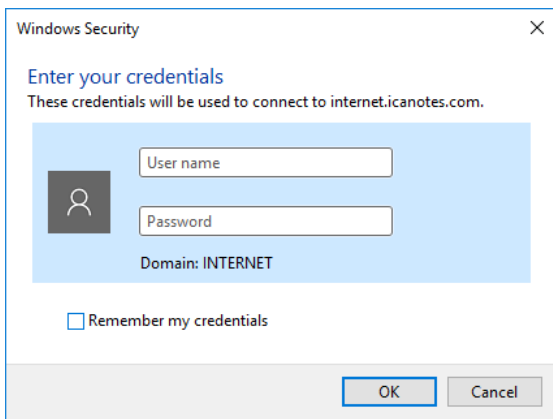
- In the **User name** field, enter your username in the following format: INTERNET\username (for example "INTERNET\janedoe", no quotations). Be sure to use a true backslash as failing to do so will prevent login. The appropriate key for this character is typically found above the key on the keyboard.

- Enter your password in the next field and click the button.

Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

- After you log in, you will see a message that says "Welcome to ICANotes." Click at the bottom of the screen to proceed.
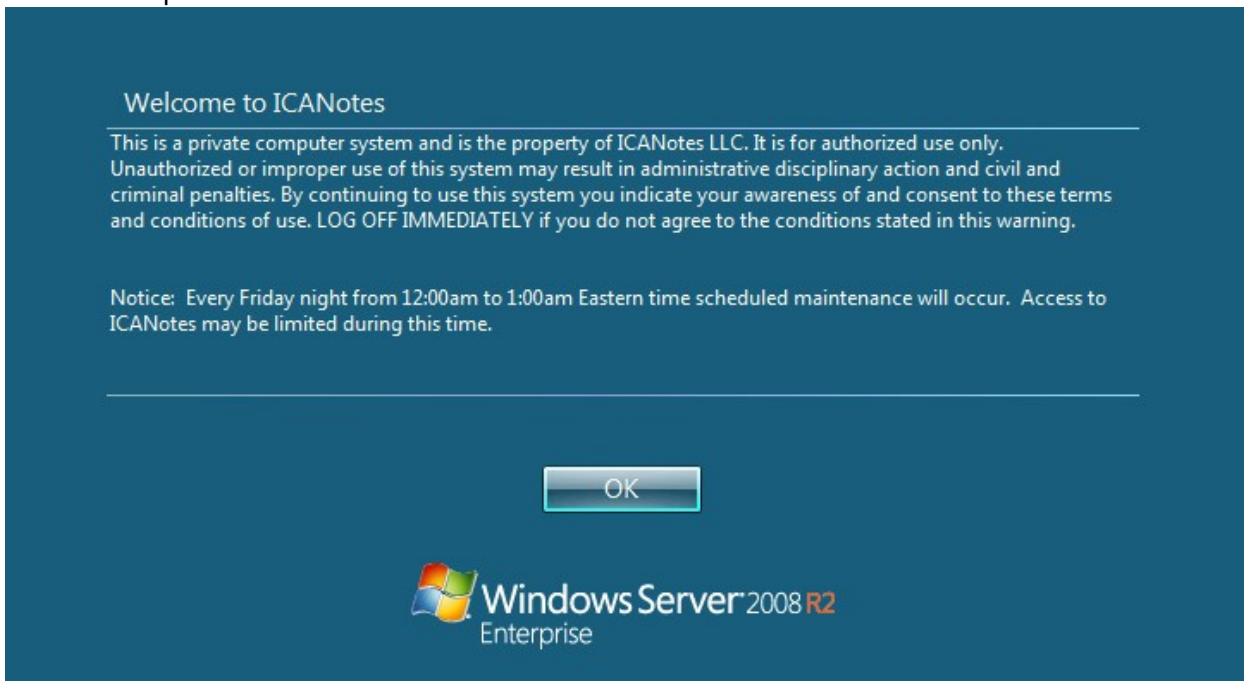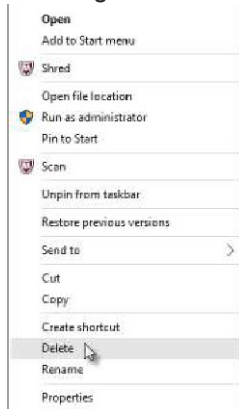
If you receive a certificate error stating that "Your remote desktop connection failed because the remote computer cannot be authenticated", please follow these steps:
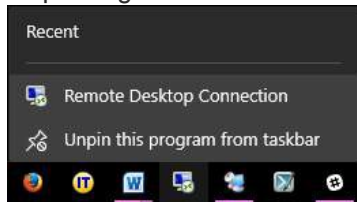
 or
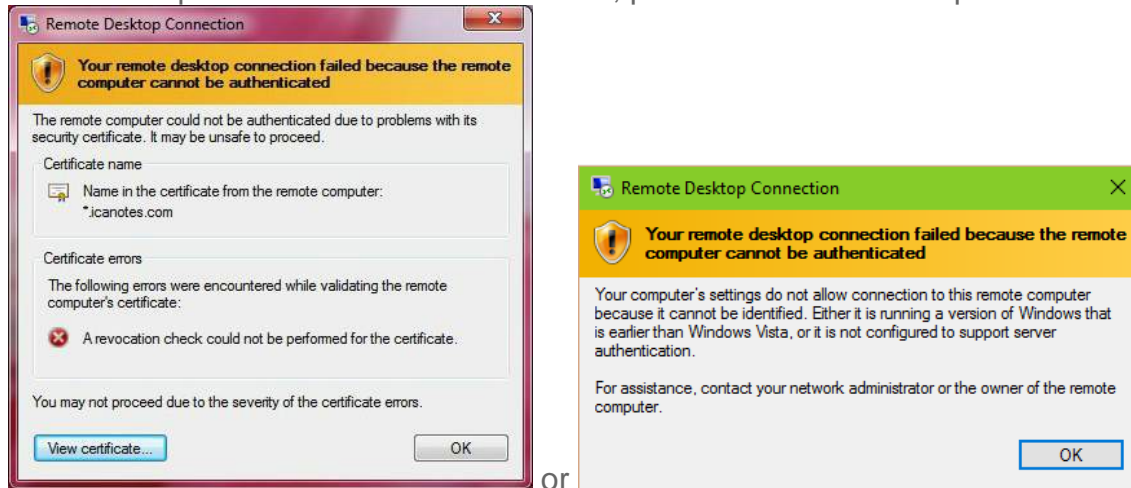
- Delete icon if one is on your desktop and unpin from the taskbar (as applicable).
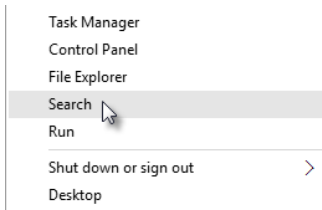
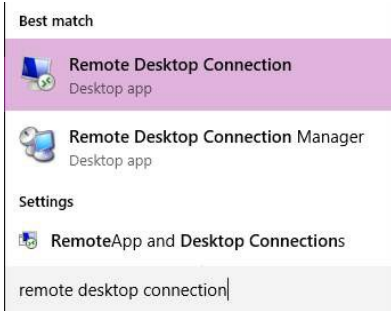   o   Deleting icon

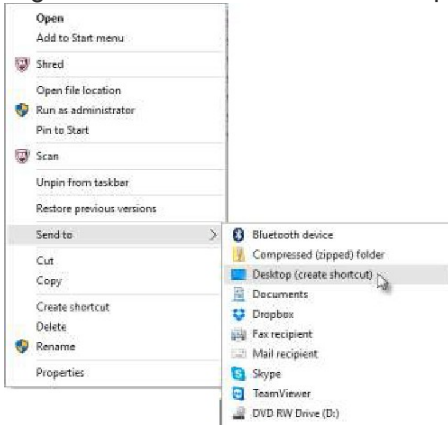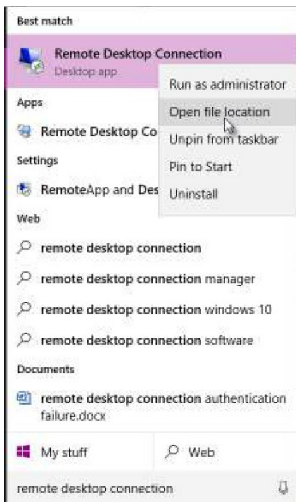   o   Unpinning from the taskbar.

- Click Search.

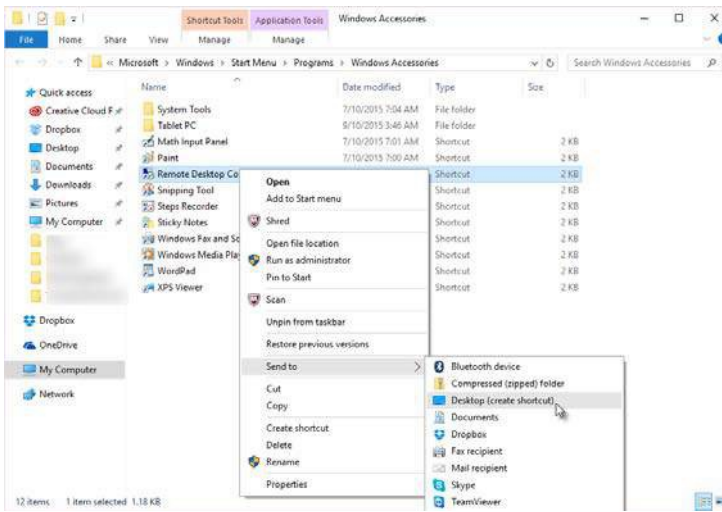- Search for remote desktop connection.

- Right click and select Send to Desktop.

- If you use Windows 10 Cortana, right click the Remote Desktop Connection Desktop app and click 'Open file location'.
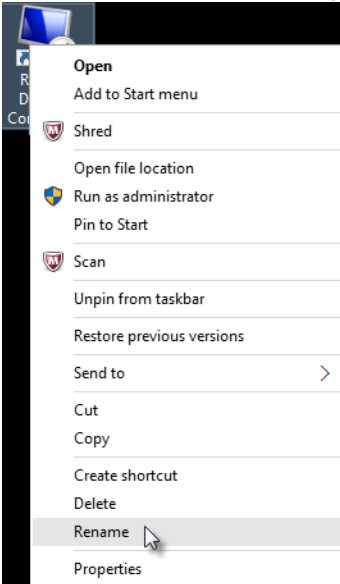

- On the popup window, select 'Send to' and then 'Desktop (create shortcut)'.

- The Remote Desktop Connection Icon will be on the desktop.
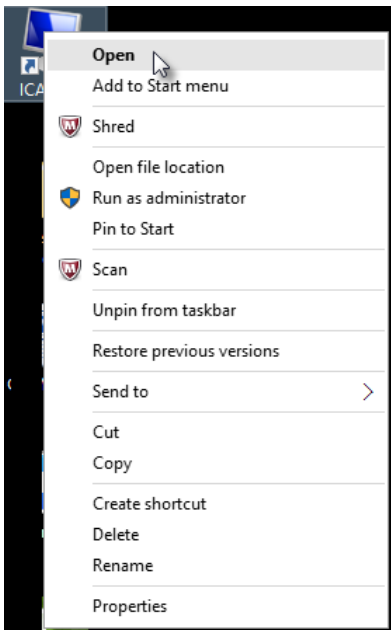

- Rename icon to ICANotes by right clicking on the icon and selecting 'Rename'.
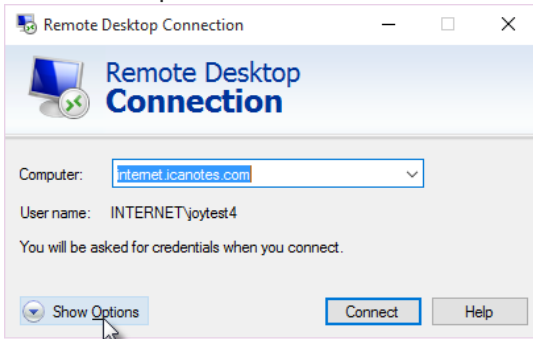

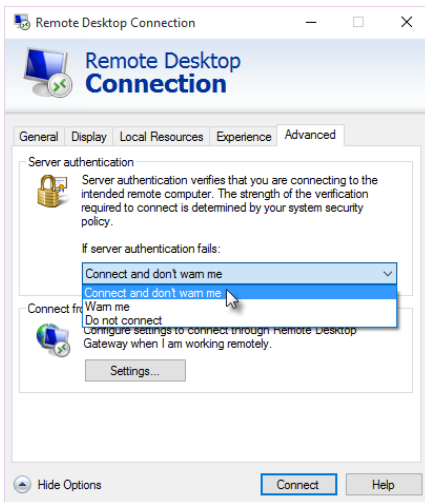- Type ICANotes and click outside the field to save the change.

- Right click the icon and select Open (or Edit).

- Click Show Options.

- Go to the Advanced tab and click the down arrow under Server authentication. Select 'Connect and don't warn me'.
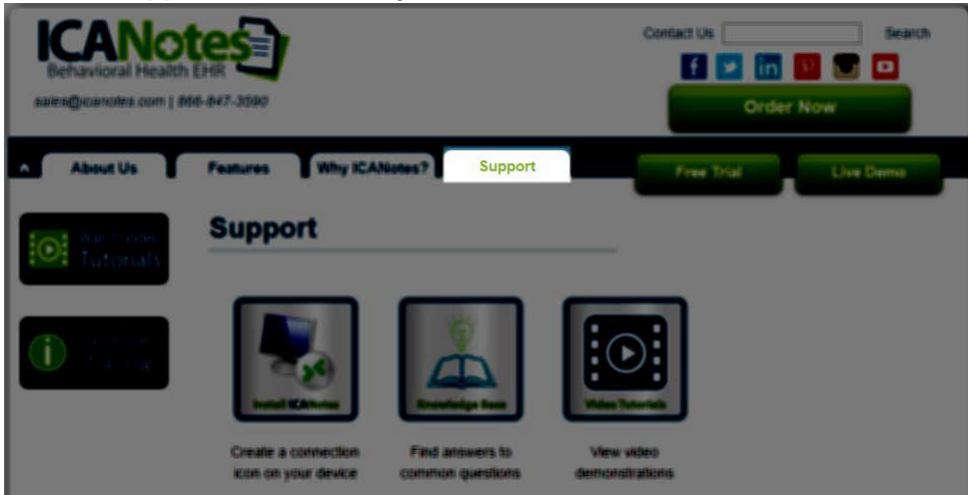

- Click the Connect button to start ICANotes.

To install ICANotes on your Mac:

- Type www.icanotes.com in your browser's address bar.

- Click the **Support** tab on the navigation bar.

- Click the [Install ICANotes] icon.

- Follow the instructions in the right column.

Mac Instructions

1. DOWNLOAD the free Remote Desktop Connection software from Microsoft. Click the appropriate link below:

Remote Desktop for Mac v2.0.1 (For OSX 10.4) or
Remote Desktop for Mac v2.1 (For OSX 10.5 or higher)
Remote Desktop for Mac v2.1.2 (experimental)

2. Find the downloaded software from step 1 on your Mac and INSTALL (Double-Click to open and follow instructions).

3. Control-click (or right click) **HERE** and select "download linked file as..." or "save link as..." and save to your desktop.

4. Double-Click on the ICANotes.rdp icon to connect to ICANotes (connect-mac.icanotes.com).

ICANotes.rdp

NOTE: Mac Printing requires PostScript Print Drivers on your local Mac.

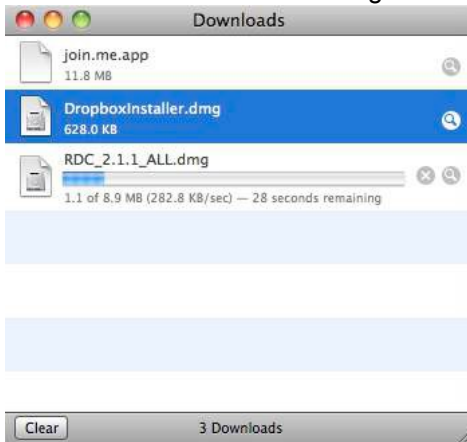*Note: Your Mac OSX version can be found by clicking the* *in the top left corner of screen and then select "About this Mac".*
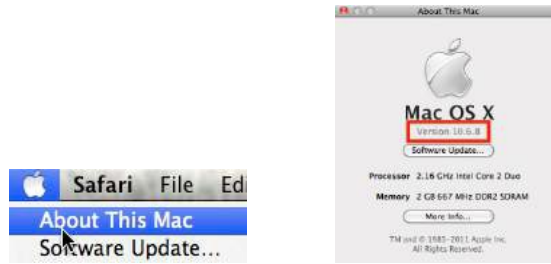
- After determining your version of Mac, choose one of the selections and click on the link.

Remote Desktop for Mac v2.0.1 (For OSX 10.4) or
Remote Desktop for Mac v2.1 (For OSX 10.5 or higher)
Remote Desktop for Mac v2.1.2 (experimental)

- ICANotes will start downloading.

- Find the downloaded software (the file should be visible as most recent download). Double click the RDC icon.
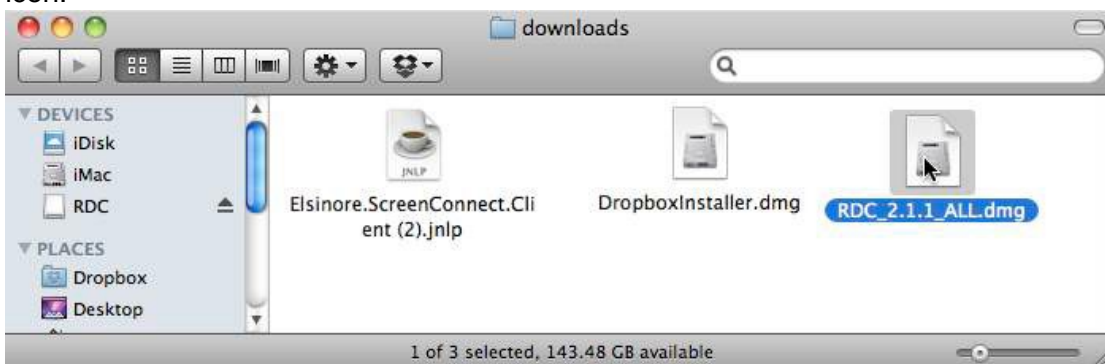
- Double click the RDC Installer icon to begin installation. If you receive a message that the file cannot be opened, please see the Mac Troubleshooting Guide.

- The installation will begin.
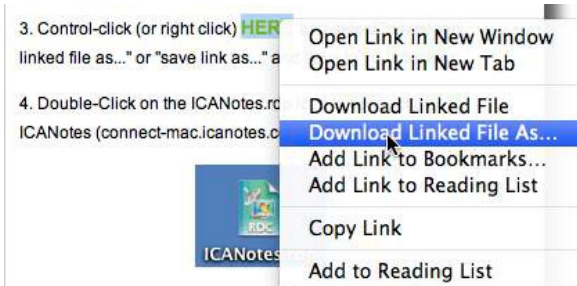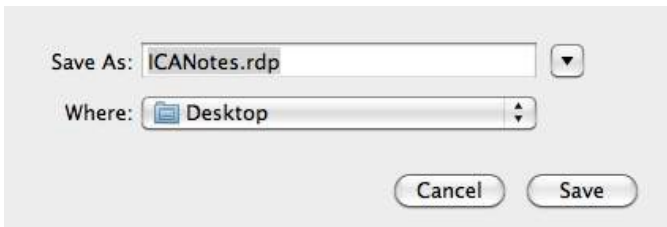

- Follow the prompts until you receive a window that states the installation was successful.

- Control-click (or right click) on the word **HERE** (on the Install ICANotes webpage as shown below) and select "download link file as…" or save link as…" and [Save] to your desktop.
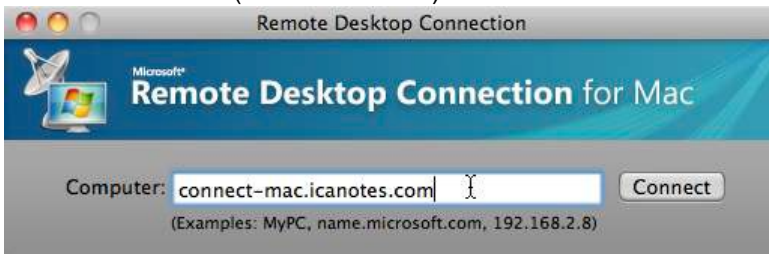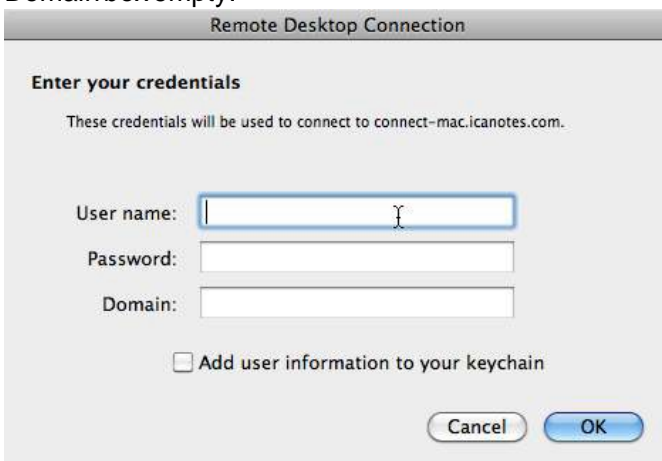
- Double-click on the ICANotes.rdp icon to connect to ICANotes.

- When the Remote Desktop Connection window populates, be sure that the computer name is connect-mac.icanotes.com (as shown below). Click the Connect button.

- You will be prompted to enter your credentials to login. Enter your User name and Password. Leave the Domain box empty.

Forgot your password? Locked out? If the wrong username/password combination is entered three times in a row, ICANotes will prevent further login attempts for 20 minutes. If this happens, or if you cannot remember your password, contact your group's security administrator or call ICANotes Support at 443-569-8778 to have your password reset or your account unlocked. **Please note: Due to security protocols, all password resets issued by ICANotes Support must be done over the phone.**

- Click the OK button.

o After you log in, you will see a message that says "Welcome to ICANotes." Click OK at the bottom of the screen to proceed.

MAC CONNECTION TROUBLESHOOTING

If you receive a message that the file cannot be opened because it is from "an unidentified developer", please follow these steps:

- o Click the icon in the upper left corner of the screen.

- o Select System Preferences.

- Click Security & Privacy.

- On the Security & Privacy window General tab, click the in the bottom left to unlock the settings.
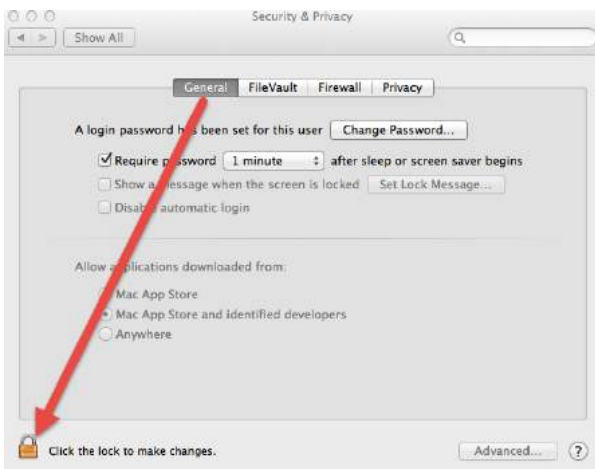
- You will need to enter your master password to unlock.
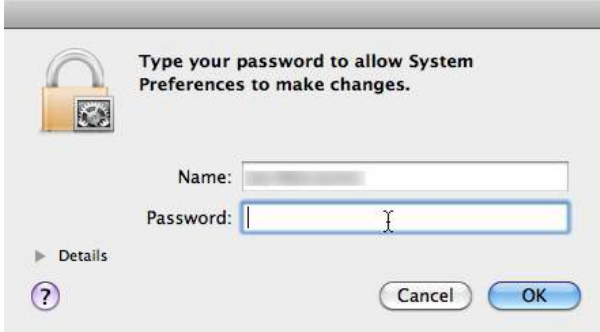
- Under Allow applications downloaded from, click the radio button for Anywhere.

- Close the window and reattempt to install.

CONFIGURING PRINTERS WITH ICANOTES

For Mac Users: Your Mac computer will automatically detect the printer you have set as your default, and will make it available for use in ICANotes.

For Windows Users: After installing the ICANotes connection icon, follow the instructions below to sync your printers with ICANotes:

- Log out of ICANotes from the Chart Room using the pink **Log Off** button.

- Open your Control Panel from the Start menu on your desktop (on newer versions of Window, right click on the ⊞ icon in the bottom left).
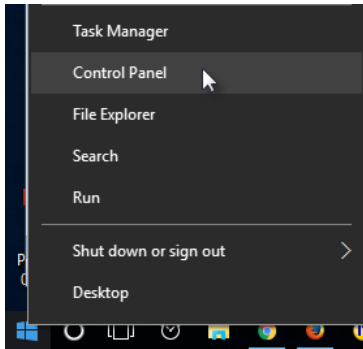
- Locate the icon 🖳 ScrewDrivers Client v4 and click on it.

Note: It may be easier to find if you change the "View by:" setting as shown below.

- Click on the **Printers** tab (in the middle top of the window).
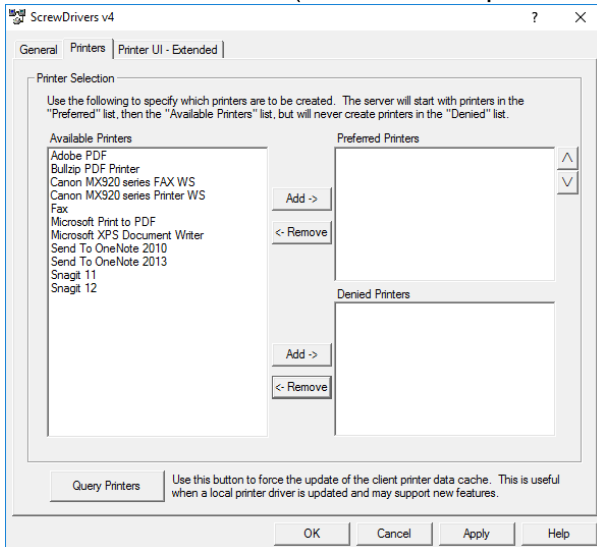
- Review the printers listed in the "Available Printers" box. Allocate each printer to either the "Preferred Printers" or the "Denied Printers" box using the [Add ->] or [<- Remove] buttons in the
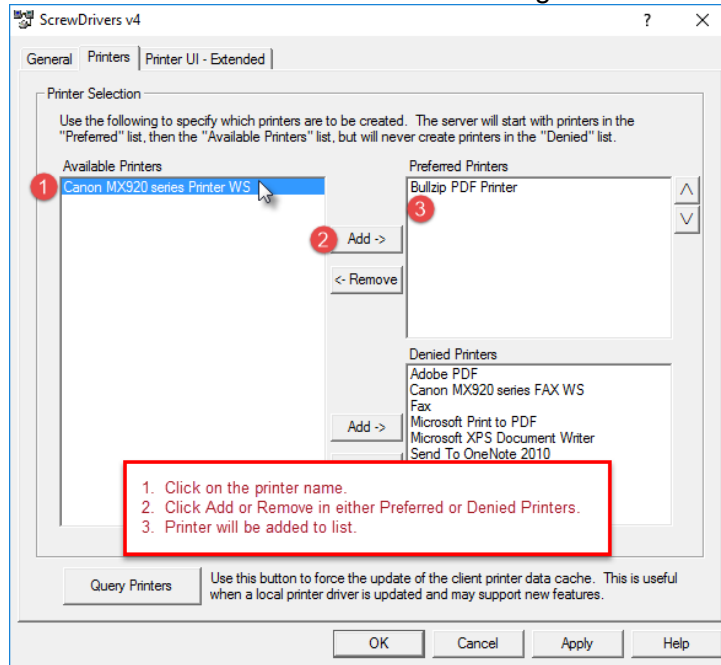
middle.

- Once each printer has been moved to either Preferred Printers or Denied Printers, click on the [Apply] button.

- Click on the [Query Printers] button.

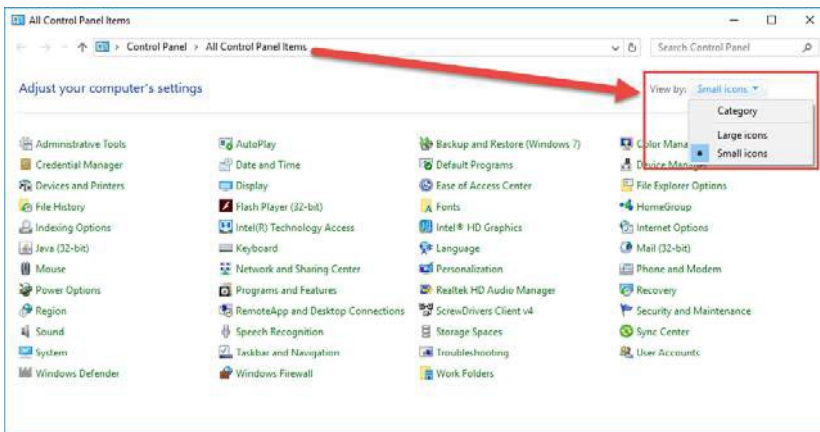- This process may take several seconds to several minutes to complete – be sure that the "Querying Success!" message appears before clicking the [Close] button.
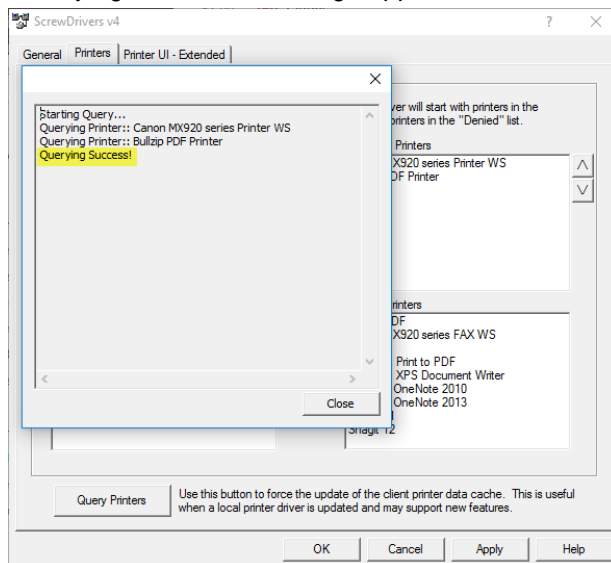
- Press the [OK] button to close out of Screwdrivers.

- Log back into ICANotes. It may take a few minutes for Screwdrivers and ICANotes to sync before printing will become available.
-

Here is a video tutorial on this process:

**Video Tutorial
Setting Up Printers**

LOGGING IN ON A TABLET OR MOBILE DEVICE

ICANotes is compatible with almost every Android and Apple mobile device, including iPads, iPhones, and Kindles. Please follow these instructions to connect to ICANotes through your mobile device. The screenshots you see below were taken on an Apple device; however, the instructions are identifcal for Android devices unless otherwise noted.

- Go to your device's app store, search for "Microsoft Remote Desktop." The app should look like this:
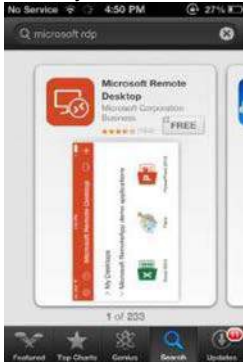
- Install the application.

- Once downloaded, open the app and tap the plus sign in the upper right-hand corner to add a new remote desktop connection (ICANotes).

- Your screen will display like this:

- Choose "Add PC or Server" to proceed.

- You will see the screen below.

- Tap "PC Name" to proceed to the next screen.

- You will be prompted to enter a "host name or IP address" – enter "internet.icanotes.com" into this field, without quotations.

- Click the "Done" button in the upper right-hand corner. This will bring you back to the screen below where you should now see "internet.icanotes.com" in the "PC Name" field.

- Tap the "User Name" field. Specify whether or not you want to be prompted to enter your username and password each time you connect. You may choose to add a user account or save your username and password – please be advised that this is not recommended due to HIPAA requirements.


- To save your username and password, choose the "Add User Account" option. You will be prompted to enter your username and password. Please note that your username must be entered in the same format as the example below, preceded by "internet\". Make note of the appropriate slash used as it must be precise in order to connect. For Apple device users, type "internet" (no quotations), then hit your "123" button in the lower left-hand corner, and then your special characters button (#+=), also in the lower left, to access the appropriate backslash. Then, return to the alphabetical keyboard and proceed to enter your username.

- Once you have entered your username in the format specified, enter your password. Please note that if you choose to save your username, your password is required.

- Once all required fields have been addressed, hit "Save" and return to the previous screen, which should look similar to this example:

- Tap the "Save" button in the upper right-hand corner to save your settings. This will take you back to the 'Home' screen of the app, which will look like this now that you have set up your ICANotes connection.

- To log into ICANotes, simply tap the connection listed under "My Desktops" as 'internet.icanotes.com'. A screen will display, indicating that you are being connected to ICANotes.
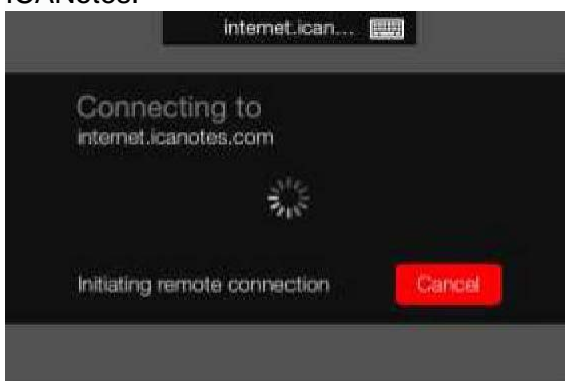
- Once connected, your screen should look like this:

Note: Upon initial login, your mouse settings may default to 'drag'. To change this, simply tap the darker-colored bar at the top of the screen. You will see the screen below appear – clicking the "Touch" option in the lower right-hand corner will change the settings to 'touch screen'.

- You should now be able to click the OK button on the login screen.