Release Notes

v.2.20.0 v. 2.20.2 v.2.20.3

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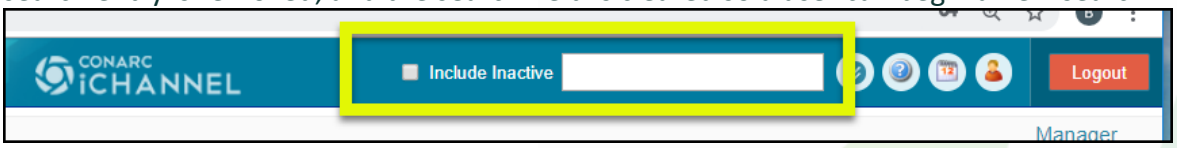
iChannel Banner

The iChannel Banner will now have a more cohesive look and feel. Previously, users could experience Modules on the Banner encroaching on the Conarc iChannel logo in the middle of the banner. In addition, the **Search** and **iChannel Menu Icons** have a new design.

Global Search Field

When a User performs a search in the **Global Search** field, the search field entries are not being removed from the previous search to allow for a new search. *Previously* if a user wanted to perform a new search, the User would first need to *manually clear* out the previous search entry or the world "Search" in the field.

To improve the User's experience, now when a user clicks in the search field, the previous search entry is removed, and the search field is cleared so a user can begin a new search.



Documents (Files) Viewable in the Submitted | Requested File Areas

Previously, when multiple documents would appear in both the **Submitted** and **Requested Files** section of the **File Area**, the File Area would decrease in size to support the display of the Submitted and Requested File sections.

Now when a User accesses the File Area, Users will no longer see a decrease in the File Area section as all sections (Submitted, Requested, and File Area) will adjust to support the display equally. This enhancement will provide a better end-user experience when searching and/or accessing files.

Users still have the option, if necessary, to use either the **Collapse (Hide)** or **Expand (Show)** feature to display as much or as little of these file areas.

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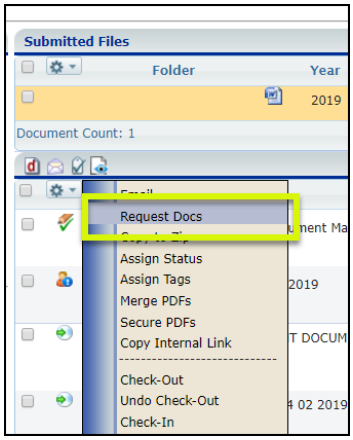
File Area – Request Docs

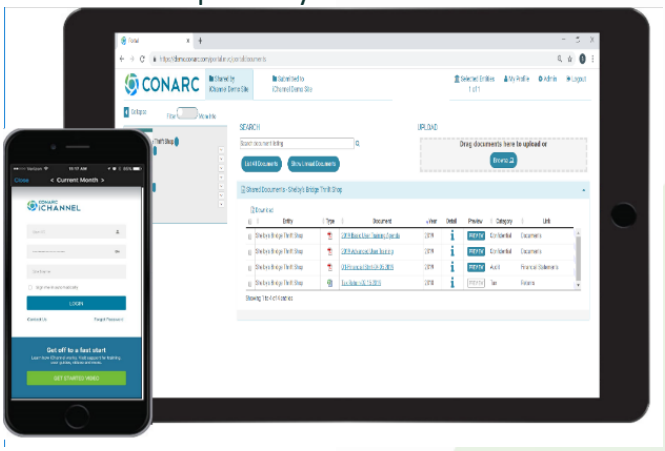
Some User's might have experienced when selecting the **Gear Icon** not able to see the **Request Docs** feature from the **Action List**. In a previous release, the Request Docs feature located in the Gear Icon action drop-down list, was inadvertently removed.

In this release, the Request Docs feature is now visible on the Action List when you select the Gear Icon.



Portal Login Screen – Mobile Friendly

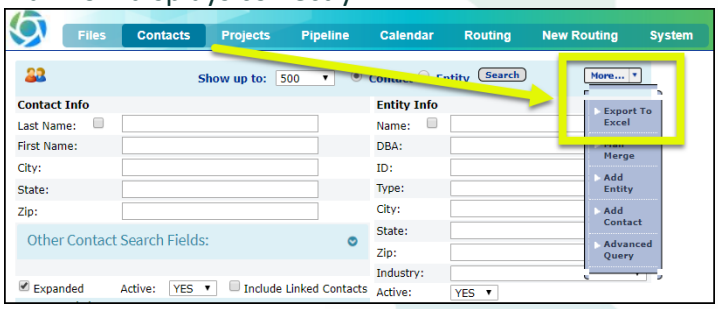
iChannel Portal login site has been enhanced to be more responsive when working with different mobile devices and compatibility with different browsers.



Contacts – Exporting to Excel

When accessing **Contacts > Menu > Export to Excel** feature on the **Contact** page, a User or System Administrator could experience when exporting your contacts list to Excel, the data wasn't displaying correctly in the columns and/or incorrect data in those columns.

To improve the User's experience, now when you select **Export to Excel** from the Contacts page the data within all now displays correctly.



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File Area – Unable to Delete Multiple Documents in One Action (To Be Deleted

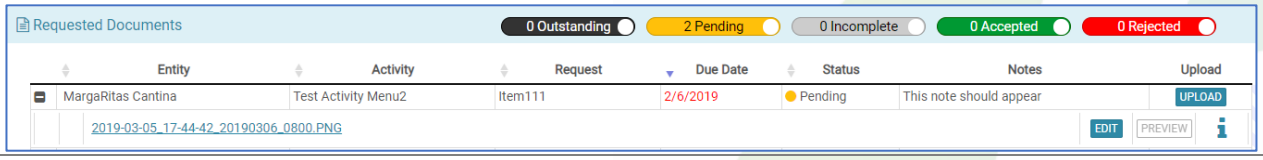
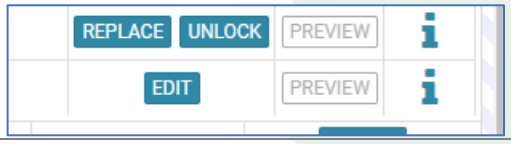
System Administrators or an Identified User at your organization who have the responsibility to clean up the **File Area** with documents that have been **Marked for Deletion,** *previously*, iChannel was limited to the number of documents that could be deleted at once using the Delete feature.

To improve the User's experience, there is no limited to the number of documents that can be Delete when documents are identified as **Marked for Deletion**.

Collaboration on a Document in the Request Grid

Clients can now collaborate on a document that is in the **Request** grid (a document that is not yet Accepted and Published). All documents in the grid can be collaborated on, even those existing before upgrading to this feature, by Locking and Unlocking the document.

Here is how a Portal User would interact with collaborating with a document.

Portal User Experience	
1	Portal User upload a document(s) to the Portal site as usual.
2	The Requested Documents displays. The REPLACE button is now called EDIT. 
3	If portal user *clicks* **EDIT**, the document is streamed to the user and the document becomes locked, meaning an internal user cannot edit it. The EDIT button changes to REPLACE. There is also an **UNLOCK** button if the user decides not to make any changes. 
4	When document is ready to be sent back, the User *clicks* **REPLACE** which will replace the document and unlock the document. The **EDIT** button will now display.
5	If the document is currently being edited by an internal User, the EDIT button will be disabled.

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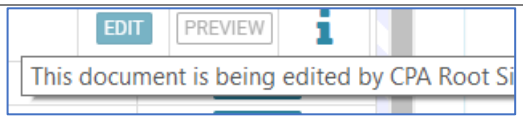
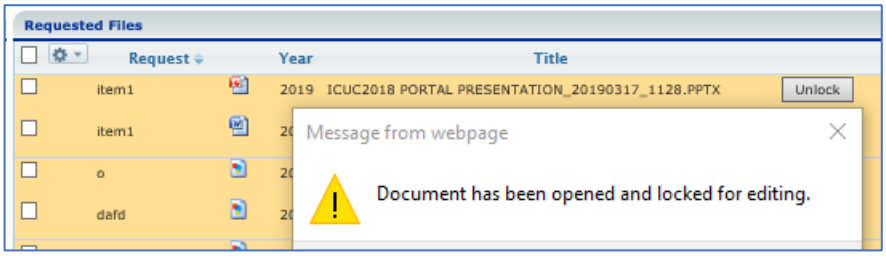
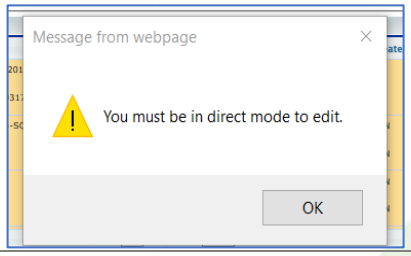
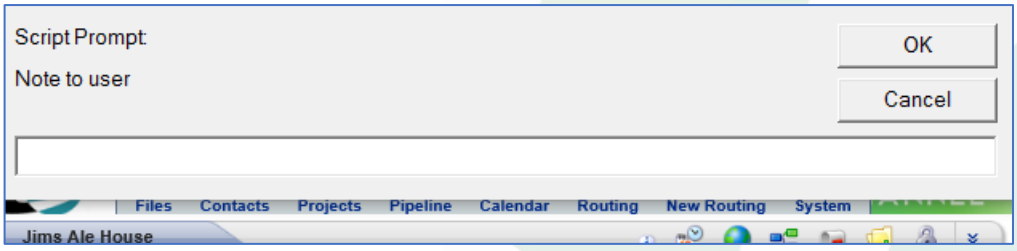


Internal User Experience

1	Requests will have an **Edit** button to the right of the Document name.
2	When the internal User *clicks* **Edit**, the document opens in "*Direct Mode*" for editing. The edit button will change to say **Unlock.**  If the User is not in "*Direct Mode*" or in Chrome without iChannelDesk running, the User will receive a pop-up message. 
3	After the document has been changed and saved, the User *clicks* **Unlock**. A prompt will appear so a message (optional) can be included in the email sent to the relevant portal User(s). (Currently, this is a simple JavaScript prompt but can be upgraded to JQuery dialog or Bootstrap modal).  The button returns to **Edit,** and the document is unlocked, now the document can be edited by both the internal and external users.

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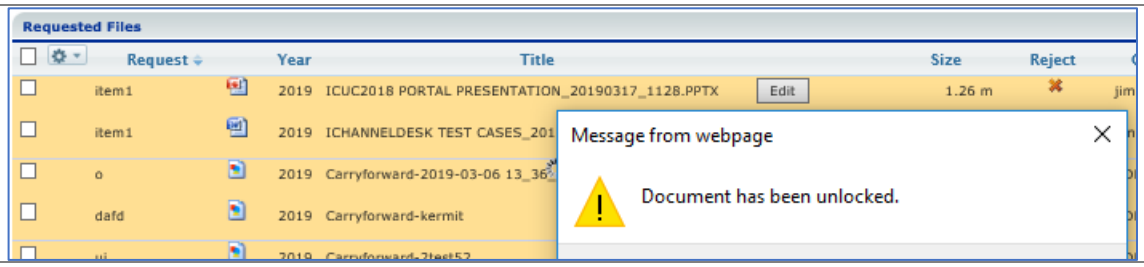
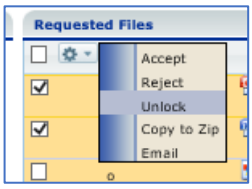
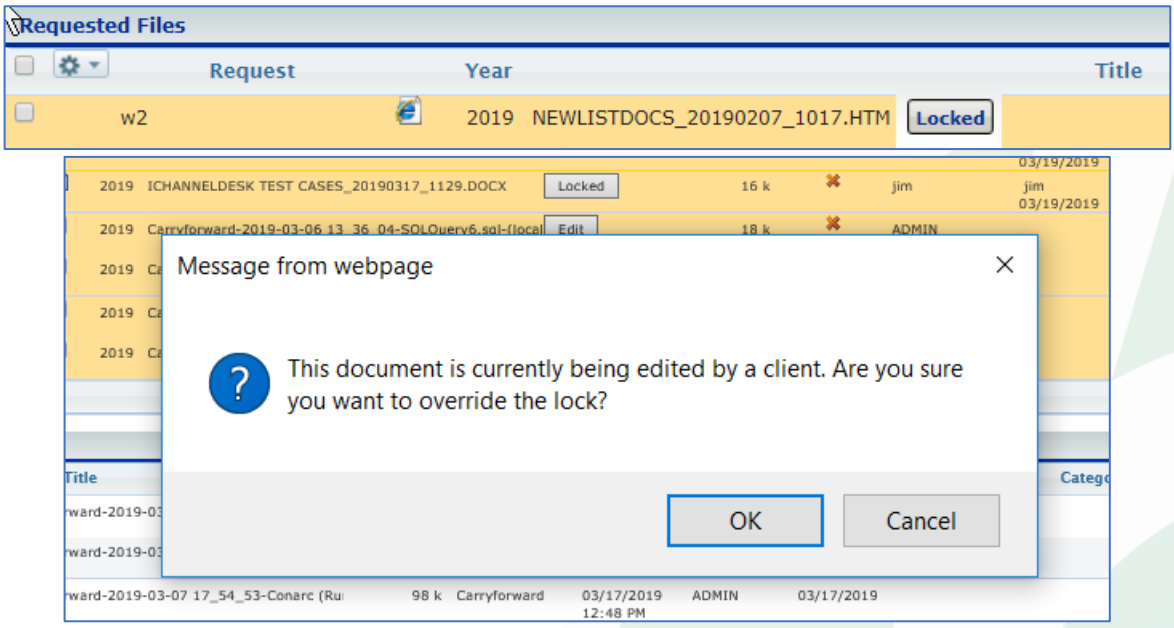


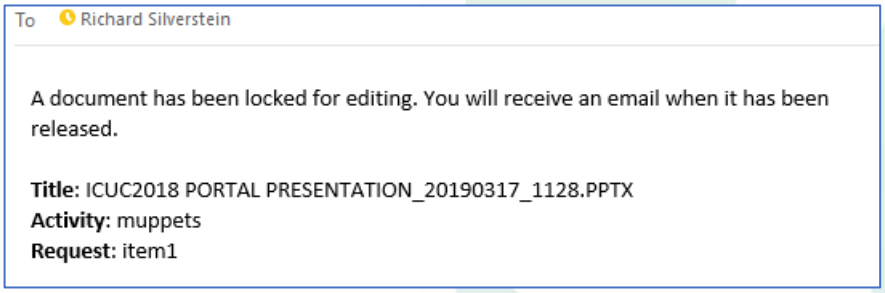
4 Multi-document unlock is available.



5 If the document is currently being edited by the portal user, the **EDIT** button would instead say **LOCKED** but will still be enabled. If *clicked*, a warning message will appear that the user is currently updating the document and will unlock if confirming.



6 The Portal User will get an email when documents are **Locked**.



Or **Unlocked**

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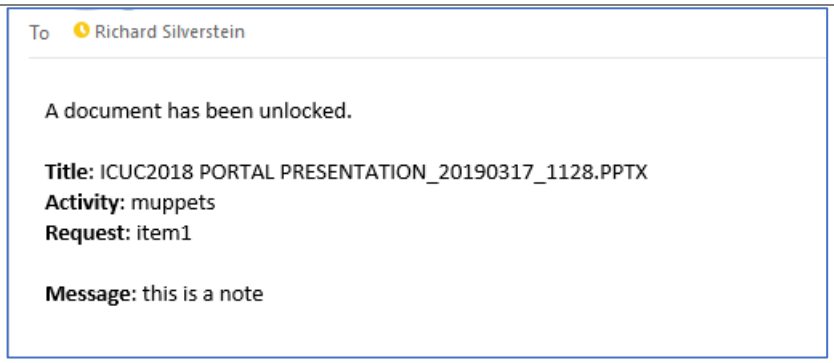
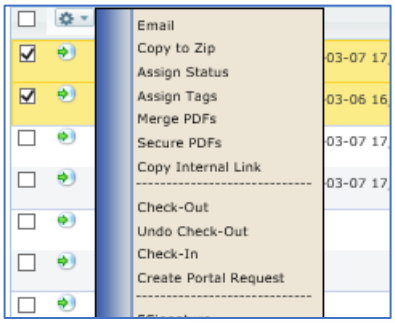
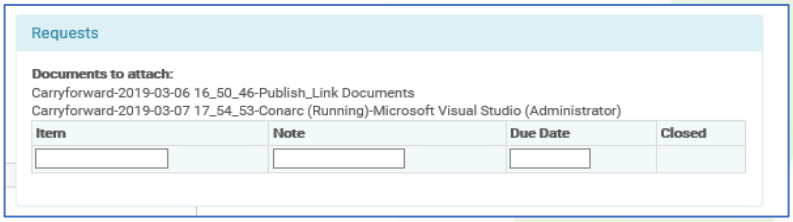


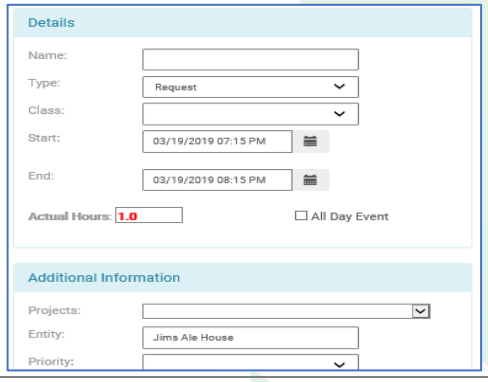
7 The internal user can also start a **Request with document(s) attached** to the requestor by selecting one or more documents and choosing "**Create Portal Request**" from the gear menu.



8 Choosing this option will take the user to the **Activity** page to create the new request. The document titles will be listed.



The NEW request type "Request" and the Entity are pre-selected.



9 The user will enter the **Activity name**, **Item**, **Note**, and **Date**. Only one request can be created when there are documents to attach. Thus, the **Add** button is gone. Once the request is created, the Request grid will refresh showing the new document.

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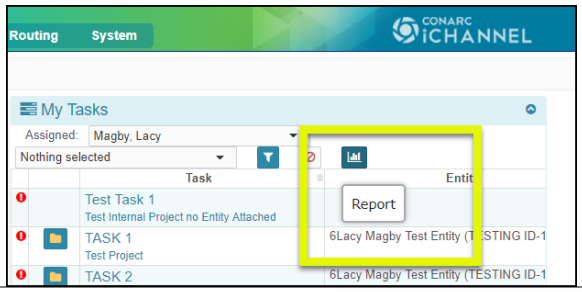
iChannel Bugs and Enhancements

iChannel Bugs and Enhancements		
1	*Disabled* **Editable Dashboard** keep showing on the dashboard drop-down list.	**Resolved**
2	**Project Reports** feature. When *selecting* **Reports** from the **My Project** widget, iChannel Reports was displaying *an error has occurred during report processing.* 	**Resolved**
3	**Uploading Documents** – iChannel had been issuing an error on specific request types in the Client Portal. The following table displays when an error was thrown and against Request Status:	**Resolved**
4	**iChannel Version not Display** – after the 2.14.1 release, the **iChannel Version** info no longer displayed at the bottom of the application when accessing iChannel in IE or Edge. The iChannel Version was showing when using Chrome or Edge. iChannel Version now displays across all browsers.	**Resolved**
5	**Email content when a document is unlocked** – When creating a portal request for a document, *select* the **requested document** in the **Requested Files** area. Next, *click* **Gear Icon** and *select* **Unlock.** A confirmation message will display. The *confirmation message* shows an incorrect email Subject message with no content in the email.	**Resolved**

Request Status	Request Expired (Yes/No)	Allows to upload documents to request	Gives Error1 (as shown in attachment)
Accepted	No	No	**Yes**
Rejected	No	Yes	No
Incomplete	No	Yes	No
Outstanding	No	Yes	No
Accepted	Yes	No	**Yes**
Rejected	Yes	No	**Yes**
Incomplete	Yes	Yes	No
Outstanding	Yes	No	**Yes**

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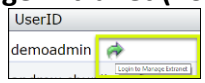
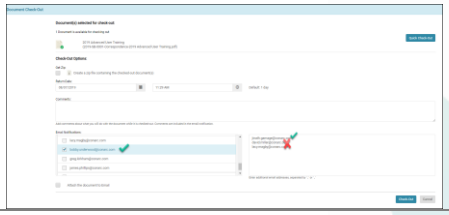
6	**Project Status Drop-down Not Filtering** – some clients that have customized Project Status types for different Project Types where experiencing unexpected filtering results when *selecting* a **Project Type** and *selecting* a **Project Status**. iChannel now cross-references on the filter options from the Project Types and Project Status Types to ensure accurate results.	**Resolved**
7	**Login to Manage Extranet (Portal)** – access a Subscriber, select the "**green arrow**"  from the UserID list. Expected result was to navigate the user to the Extranet (Portal); actual result was the User was redirected to the Dashboard.	**Resolved**
8	**My Project widget | Task List** – in the My Project widget, expand the Task icon to display the list of tasks associated with a Project. Next, click Project Name to open project detail page. *Close* the **Project**, you will return to the **Dashboard**. Try to expand the Task icon to display the list of tasks associated with the Project. Your "expand Task" feature is disabled.	**Resolved**
9	**IC Emails: Sent Emails not displaying** – there was an issue when Users were not seeing emails sent when using the **Gear Icon > Email** feature. To **add a new line** of the message in **team** room, we could press + **Enter** keys	**Resolved**
10	**Document Properties not Saving changes** – there was an issue when a User made changes to a document, those changes were not being saved in the Document Properties.	**Resolved**
11	**Expiration Date less than Current Date** – there was an issue when Users were Assigning Documents to another User, iChannel was allowing for the Expiration date to be earlier than the Current Date.	**Resolved**
12	**Compose Email page: Delete | Move Documents allowed to send the email** - there was an issue allowing Users to send Deleted and/or Moved documents via email. Expected result – iChannel should not allow Deleted and/or Moved documents via email.	**Resolved**
13	**File Area | Checkout Document: Email to Multiple** – there was an issue when using the **Check-Out** feature. iChannel was only sending emails to those checked in the **Notification** fields and the "*first user*" of the **Additional Email Addresses** field. All additional email addresses will be ignored. 	**Resolved**

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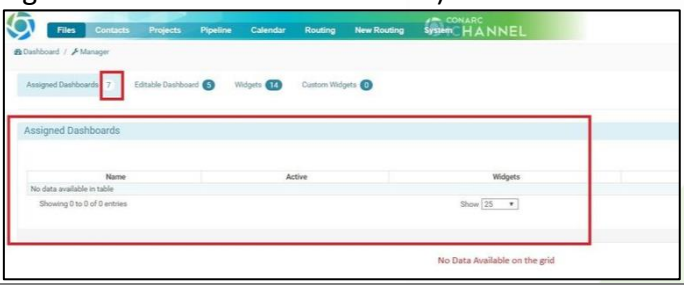
14	**Compose Email BCC Sender** – there was an issue when *deselecting* the **BCC Sender** checkbox, the Sender's email address was not being removed from the Bcc: field. **Expected result**: when the BCC Sender checkbox is unchecked, the Sender email is now removed from the Bcc:	**Resolved**
15	**Missing Data on Assigned Dashboard Grid** – there was an issue when *creating* a **New Dashboard** under the **Assigned Dashboards** not displaying data in the widgets. When you *click* **Manage** (Security Group Permission controlled) from the Dashboard, *create* a New Dashboard and add widgets. When you save and return to the Dashboard Main page, your widgets were display the following message: "**No data available in table**"). 	**Resolved**
16	**Projects: Search results not in alphabetical order** – When doing a search for an Entity, the results were not in alphabetical order. Results now appear in alphabetical order.	**Resolved**
17	**Issue not Displaying Specific Subscribers on Compose Document Email** – When *selecting* a **document from the file area** of the Entity and *select* **Email** option form the gear icon. The Subscriber list was not displaying the complete list of subscribers. Now, all Subscribers of the Site will be displayed under the Email list.	**Resolved**
18	**Inaccurate Default Expire Date on Secure Link Email** – date was displaying two days in the future.	**Resolved**
19	**File Area | Deleting Documents Users not getting Email Notification** – User where not being notified when a document was being deleted. Users are now notified when a document is deleted.	**Resolved**
20	**Contacts | Email field, was not validating the email format**	**Resolved**
21	**iChannel Session Timeout** – a new message will appear when iChannel reaches the defined timeout session. User's will be advised to log back into iChannel.	**Enhancement**

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22	**Group/List** – on the Group/List under Contacts, iChannel no longer allows a user to Change Site Code or Attach to Project button.	**Enhancement**
23	**Session Timeout Notification (IE)** – on the timeout screen when a user clicked on the window, it wasn't taking the user back to the login page.	**Resolved**
24	**The Category field is not showing info from Document Properties –** When User's accessed the Document Properties for a document, the Category field was not showing the category information. Users will now see this field populated with the category information.	**Resolved**

25	**Ability to change filename from the file area** –
	• Next to the filename, add a button labeled "Change File Name"
	• Clicking this button allows the user to change the file name
	  ○ The file name gets changed in Conarc_iChannel.dbo.Documents
	  ○ The file name gets changed for the actual file in the file server
		Enhancement

26	**iChannelDesk** – Disable the pop-up when ICD is not running and/or down. disable the pop up that comes when ICD is down so as to not allow an unauthorized user to get access to the files?	**Enhancement**
27	**File Area / Submitted Files / Email (Gear Icon) –** visual indicator to show the number of documents being emailed, wasn't display a value. Users are now able to see the value of number of documents being emailed.	**Resolved**
28	**Subscribers –** previously, Users could create a duplicate subscriber record; when iChannel shouldn't allow. Users are no longer able to create a duplicate subscriber record(s) in iChannel.	**Resolved**
29	**Existing Hyperlinks Not Work after v2.16.4 –** resolved with 2.20.0	**Resolved**
30	**Subscriber Notified when Notifications are set to "Off" -** NotifyOfPublishedByEmail procedure was replaced with SavePublishedDocLogEmails, in ListDocsController, it left off the check for NotifyMembers	**Resolved**
31	**My Assigned Document (Widget) –** The Entity column was only displaying the Root site entity. The Widget now displays the correct Entity for the assigned document(s).	**Resolved**
32	**Docusign - Error when multiple docs are sent to eSign on same envelope id**	**Resolved**
33	**In Subscribers | send portal is ready email shared password printed incorrectly in the email –** subscribers will now see the password displayed correctly in the email notification.	**Resolved**
34	**Accepting multiple documents from the portal causes an error –** Users will no longer encounter an error message when accepting multiple documents from the Submitted/Requested section of the File Area.	**Resolved**
35	**The Category field is not showing info from Document Properties –** When User's accessed the Document Properties for a document, the	**Resolved**

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	Category field was not showing the category information. Users will now see this field populated with the category information.	
36	**Portal - same file duplicated –** When User's were Publishing a Document to the Portal, it was creating duplicate documents.	**Resolved**
37	**New Salesforce Integration –** iChannel supports Salesforce coding to Integrate iChannel API	**Enhancement**
38	**Request Documents –** iChannel generated an error messages with files larger than 200MB. iChannel now supports up to 1.5GB file size	**Resolved**
39	**My Calendar Widget Not Rendering Correctly –** the Assigned To drop-down does not appear at times and it's not showing the calendar items that belong to the user or other users.	**Resolved**
40	**iChannelDesk (iCD) issue when connecting to web/iCD while vpn is off and then connecting –** when User(s) logins to either web or ICD while the VPN is off; the IPs for each that is recorded in Usersession table are wrong.	**Resolved**
41	**Workflows (Projects) –** additional new lines where being removed from workflow notes section.	**Resolved**
42	**Security: Grant All button removed all checked permissions for Modules –** if an Admin selected the Grant All Button, the feature would remove all settings that are already applied.	**Resolved**
43	**Secure Link Email – on Cancel email was still be sent to recipient –** issue where even when the User selected the Cancel button to not send an email; the email was still being sent.	**Resolved**
44	**File Area: Link Only feature –** an issue when selecting the Link Only feature from the Gear Icon; the link feature was not performing as expected.	**Resolved**
45	**Workflows: Workflow History was displaying the incorrect User.**	**Resolved**
46	**Reports: Removed Sales reports –** Removed the Group Rights Drill Cube, Sales Charts, Task Sales Charts from v2.16 & v2.20	**Enhancement**
47	**Warning and Confirmation when uploading Large Documents –** iChannel now displays a Warning and Confirmation Progress Bar when uploading documents larger than 2GB.	**Enhancement**
48	**Project Task email notification –** new project task email notification template with client customization	**Enhancement**
49	**Gear Box – Rename Functionality –** Update to the name on the gearbox drop-down to be "Rename Title".	**Enhancement**
50	**Previously –** before v2.20 clients were able to login to iChannel by passing URL parameters. This was not functioning with v2.20.0	**Bug**
51	**Export Contact to Excel –** clients were not able to Export to Excel if the Entity radio button is selected.	**Bug**
52	**Inactive Contacts are not listed –** when checking the Inactive checkbox was not listing all Inactive clients.	**Bug**

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53	**When a user clicked on the Preview button in Uploaded Documents records, user was signed out.**	**Resolved**
54	**Create Entities with the same (allow duplicate names)**	**Resolved**
55	**Add Documents page default Category was not displaying with default category highlighted. –** default category is determined by what is listed first from the CA_DEFAULTPARENTCAT field on Advanced Settings.	**Resolved**
56	**iChannel Portal enable 2FA –** user would enter the correct code; user would receive a pop-up message to contact System Administrator. User is no longer receiving the pop-up message with correct code.	**Resolved**
57	**File Area – Routed Documents was not showing correct Entity -** When in the file area, you place a check next to a document and go to the gear icon and select "Assign To", when it shows up in routing it is not showing the Entity that the file belongs to, rather it shows the Root Entity. Entity field is now displaying the correct Entity.	**Resolved**
58	**Users encountered an Error message when merging PDFs –** a user would receive a message "Could not merge file. One or more may have a new format". Validation added to skip further processing when there are no bookmarks.	**Resolved**
59	**File Area – Request Document | Site name is appended under the signature when sending emails to request document for submission –** site name is now displaying based on the site the document request is performed.	**Resolved**
60	**File Area – Secure link download count not correctly displaying –** the count is now displaying based on the secure link.	**IC-4560**
61	**Dashboard – Selected default dashboard not loading on v2.20, unable to delete previously created dashboard –** software fix to resolve	**Resolved**
62	**File Area – Users experienced to able to view Document History - i**f the CRM security is disabled Vfp version of SecurityRightsManagerProvider used.	**Resolved**
63	**iChannel Portal – Notifications not sent when internal user switches to portal and uploads.**	**Resolved**
64	**iChannel Portal- Request Documents Drag and Drop option was not working in IE**	**Resolved**
65	**Global View Entity permission is enabled and entity search result displays as 0 records and cannot view entity details -** Actual Result: Error: You do not have permission to view this entity message displays for the search result. Expected Result: When the global view entity permission is given this entity details should be visible to the user.	**Resolved**

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66	**Security | Activities are not displayed on the Calendar page when users has enough permission to view.** RESOLUTION Activities which user has access will be displayed based on following rules. If there is no entity or project associated with activity → Activity Visible If user has access to associated entity → Activity Visible If user has access to the entity of associated project → Activity Visible If user has no access to associated entity or entity of associated project → Activity Not Visible Further the contacts of the activity being displayed also contains only from the entities which user has access too. The entity of the activity is displayed without any restriction. In the case #3, though user has access to project entity, no access to the activity entity. In this scenario entity name will be displayed, however when entity link clicked, not allowed to view the entity.	**Resolved**
67	**Users where encountering a message in iChannelDesk were no files found when opening the Open window.**	**Resolved**
64	**iChannel Portal- Request Documents Drag and Drop option was not working in IE**	**Resolved**
65	**Global View Entity permission is enabled and entity search result displays as 0 records and cannot view entity details -** Actual Result: Error: You do not have permission to view this entity message displays for the search result. Expected Result: When the global view entity permission is given this entity details should be visible to the user.	**Resolved**
66	**Security | Activities are not displayed on the Calendar page when users has enough permission to view.** RESOLUTION Activities which user has access will be displayed based on following rules. If there is no entity or project associated with activity → Activity Visible If user has access to associated entity → Activity Visible If user has access to the entity of associated project → Activity Visible If user has no access to associated entity or entity of associated project → Activity Not Visible	**Resolved**

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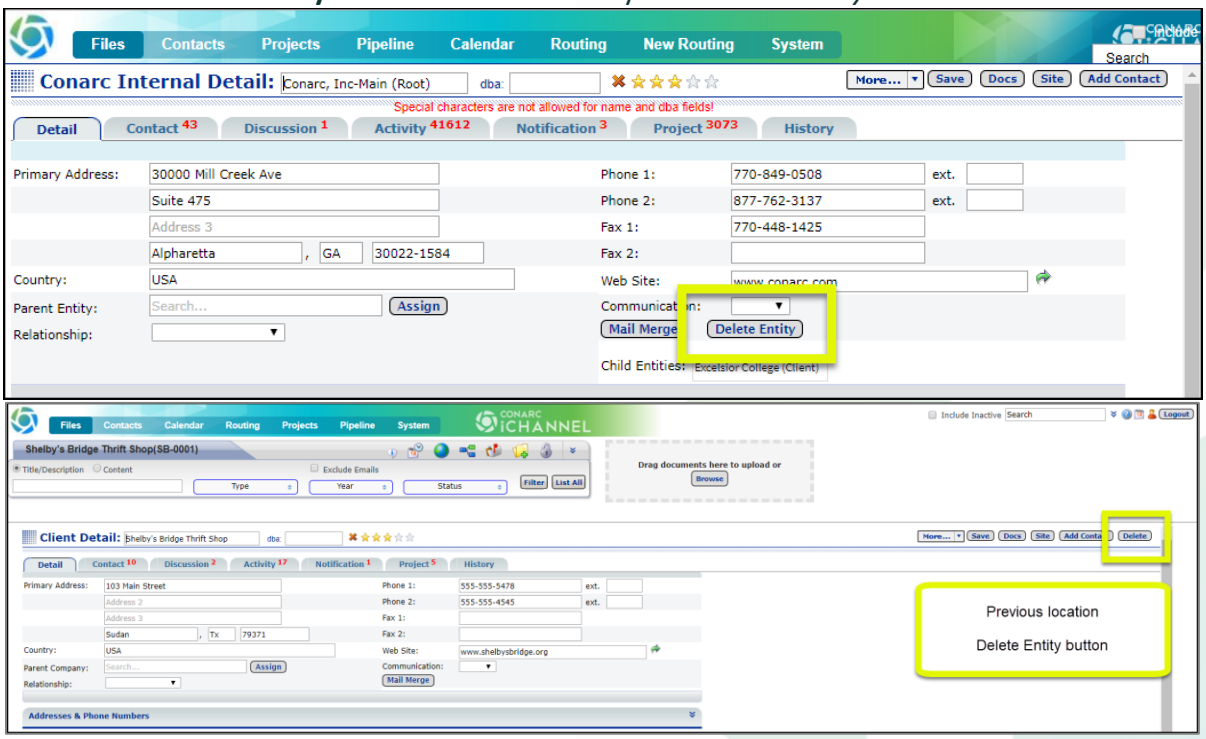
	Further the contacts of the activity being displayed also contains only from the entities which user has access too. The entity of the activity is displayed without any restriction. In the case #3, though user has access to project entity, no access to the activity entity. In this scenario entity name will be displayed, however when entity link clicked, not allowed to view the entity.	
67	**Users where encountering a message in iChannelDesk were no files found when opening the Open window.**	**Resolved**

Client Detail: New Delete Entity button (System Admin Only)

Previously on the **Client Detail** page the **Delete** button to remove a client from iChannel was located on the *menu of action buttons*. The *new* **Delete Entity** button is now located on the **Detail** tab.

- The **Delete Entity** feature is controlled by *iChannel Security*



File Area – Unable to Delete Multiple Documents in One Action

System Administrators or an Identified User at your organization will have the responsibility to clean up the File Area with documents that have been **Marked for Deletion**. Previously, iChannel was limited to the number of documents that could be deleted at once using the Delete feature.

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To improve the User's experience, there is no limited to the number of documents that can be Delete when documents are identified as Marked for Deletion.

Session Validation – Web API Request (System Admin Only)

iChannel now validates all public Web Service Endpoints and will block any unauthenticated requests coming in.

This is a *new* **Security Feature** within iChannel.

Custom Notification Emails

Previously, emails that where generated in iChannel only had the ability to use **out-of-the-box non-customized email notification templates**. With this release, Clients can now request to implement **Customized Notification Emails**.

Currently, iChannel supports the following notification templates for customization:

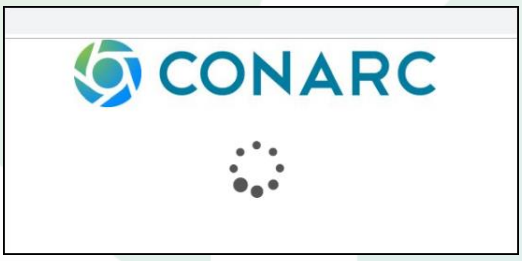
- File Added to Portal
- Password Change
- Welcome to Portal

To request the use of Customized Notification Emails, please *contact* **Conarc Support**.

iChannel Splash Page

In early releases of iChannel before a User was able to access the Login Page, iChannel would initiate or load a **Splash Page** where items (targets) would load individually. This instance would add additional loading time to the application before the webpage (Login Page) would completely display.

This intermediate step (Splash process) is no longer needed or required. To improve the Users site experience, iChannel has implemented a responsive loading icon or image (spinning icon) while the webpage is loading to provide enough time for all targets and components to completely load.



Security Groups – New Security Permissions

You might have individuals outside of your organization or even within your own organization where you want to ensure a strict **Security Policy** on "*who*" and "*what*" those individuals can search and/or view. *Previously*, many Security Rules (Security Groups)

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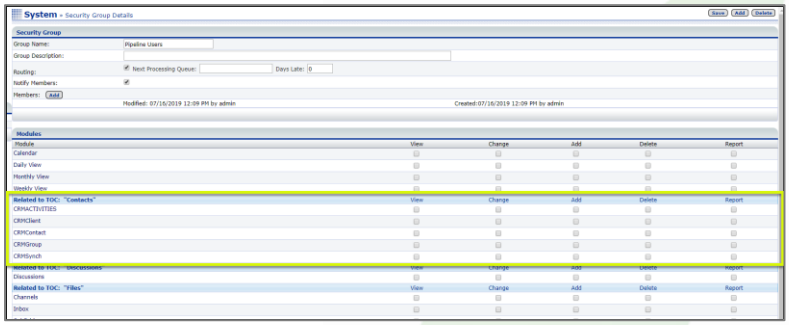
have only applied to accessing documents. A new enhancement is now in place to extend **iChannel Security Rules** (Security Groups) to also include:

- **Contact Search** – filter contact search result
- **Entity Search** – filter entity search result
- **Group/List Page Search** – restricts the user list
- **Project Search** – filter Projects results from the Project Search screen
- **Global Search** – restricts Global Search results
- **Dashboard Widgets** – restricts Widget data
- **In-direct Contact | Entity Display Areas**

To *access* and *set the proper security permissions* by **Security Group**:

1. *Click* **System** from the banner.
2. *Click* **Subscribers** from the navigation list
3. *Select* a **Subscriber** from the list
4. In the **Group Membership** area, review what groups the Subscriber is a part of. In the **Group Membership** area, *Click* on the **Security Group** name.
5. In the **Related to TOC: Contacts**, ensure the Subscriber permission are set to ensure rather of not the Subscriber can perform search in the Contact Filter Search.



Contacts Search – Filter Entity Search

A new enhancement on how a System Administrator or End Users can perform a search in the Available Contacts list in the Entity Search fields. The list of Available Contacts is now based on User's Security Group profile.

Additional areas where this new Security Enhancement effects:

- **Activity | Contacts** add & edit
- **Discussions | Contacts** for add & edit when sending an email
- **Projects | Contacts** for assigning the Primary or Secondary contact(s)

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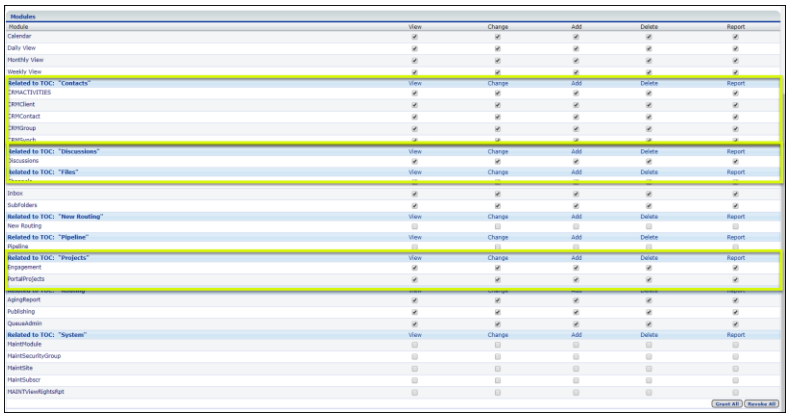

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