iCHANNEL

Release Notes

V 2.20.7

iChannel Bugs and Enhancements v 2.20.7

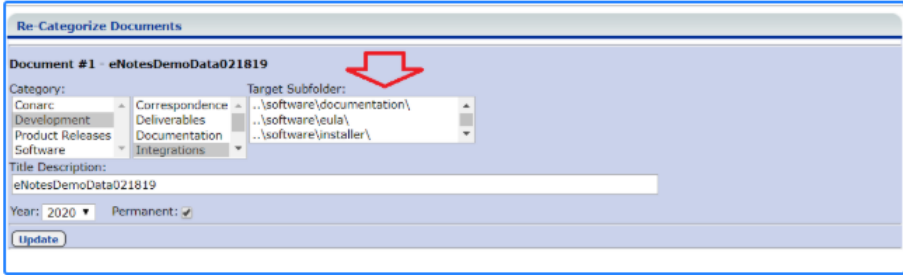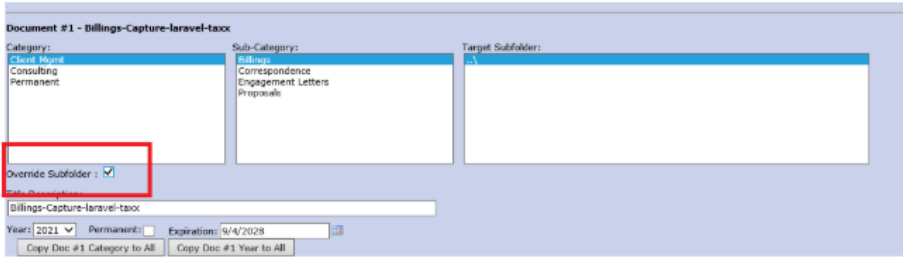|	iChannel Bugs and Enhancements	
1	**Email Confirmation** – new enhancement when the user is assigning a file, the recipient wasn't getting notification. 　　◉ **Resolution** – when a user assigns a file to another user, the user now will receive an email notification of the new assigned file. When shared with a group, an email is also sent to all members of the group. 　　　　o This email has a customizable template in \web\EmalTemplate\FileAssigned.txt	**Enhancement**
2	**Recategorizing CaseWare Files** – when a user moves or recategorizes a CaseWare binders).AC files), all associated files (PDFs & DOCs) need to move as or re-categorize also. 　　◉ **Resolution** – when a user recategorizes, moves, or copies a CaseWare file, the associated files should also be addressed.	**Enhancement**
3	**Convert My Profile page to .NET** – when a user changed your information fields, it was still going through cadoc_extranet. 　　◉ **Resolution** – change password, password validations, update user first|last name, phone, email address, updating security questions and answers are now implemented in .NET	**Enhancement**
4	**Block uploading of malicious file types to the Portal interface** – When uploading documents to the portal, (via doc request or dragging and dropping from a regular portal login) the portal should check to make sure the following files are not allowed to upload. .reg .exe .msi .pif .application .gadget .msc .scr .msp .cpl .cmd .bat .com .vbs .vb .vbe .py .jar .js .hta .html .htm .dll .tmp .lnk .inf .scf .ps1 .ps1xml .ps2 .ps2xml .psc1 .psc2 **Extensions** BIN, BAT, COM, CMD, CPL, CMD, CSH, EXE, INS, INX, JOB, JS, JSE, MSC, MSI, MSP, MST, PS1, PIF, REG, RGS, SCR, SHS, U3P, VB, VBE, VBS, IPT, WS, WSF, WSH This will prevent malicious applications from being uploaded to the portal. Clients should not be able to upload these types of files. 1. Display this message next to the document "This File type is not supported" 2. Disables the "Upload" button until the file is removed from the selection.	**Enhancement**

	3. Make this a config option on Appsettings, by default add all above extensions. **Resolution** When a user is trying to upload a malicious/invalid file type from the *portal browse/ upload/ replace functionalities* the file will not be uploaded and a message will pop up in top of the window that the file has been removed. If a user selects a combination of files which includes malicious/invalid file along with valid files, user has the ability to upload the other files and the invalid files will be removed from the selection with a message When a user is trying to upload a malicious/invalid file using *the requested doc link provided from the ichannel*, files which are inadmissible will be marked and the user has the ability to remove them from the selected list and once they have been removed the upload button will be enabled. The file list can be customized using the ***InValidExtentionList*** key in the Appsettings. The above mentioned extensions are added by default.	

5	**CRM Security: new button for Admins to run services to sync CRM Security** – CRM Security updates require someone to manually run the services to apply changes since the service only run at Midnight each day.
	
	Add a feature, for Admins only, where within iChannel, if a CRM security is defined for a user. The Admin can quickly click a button to manually run the services to apply the new CRM security to the user.
	
	This new button would allow the Admin to apply security and not have to wait for either Midnight or for another resource to manually run the service (leaving the user to have to wait before the security is in place)
	
	Resolution:
	
	• The "Sync" button is added to all the CRM permission settings pages.
	    o Channel Permissions (internal/portal)
	    o Site Permissions (internal/portal)
	    o Topic Permissions (internal/portal)
	    o Document Permission (internal)
	• This is just a trigger to run the SQL Agent Job.
	• This feature is not available for non-admin users (of both internal and portal)
	• If the CRM security is turned off, this button should not be visible.
		Enhancement

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6	**iChannel Password Compliance [HIPAA]** – Complying with HIPAA Policies. While it has been established that passwords should be a minimum of 8 characters, include upper and lower case letters, numbers, and special characters, this practice has been challenged in recent years, as has the practice of enforcing changes to passwords regularly. *Resolution* Current Password Policy requires users to create/update password with a minimum length of 8 characters to be compliant with HIPAA Standards.	**Enhancement**
7	**Contact and Entity search page** – Customers are typing in single characters in the 'first name' and/or 'last name' and/or 'entity' fields and its searching for all records that contain that character. Which returns too many results to be useful and causes **Resolution** • Search criteria created with at least 2 characters to search	**Enhancement**
8	**Add ##FIRSTNAME and ##LASTNAME to Portal Publish email** - In the current template for the Publish Documents email, we are using a single key to generate the "User Name" field and it comes with the USERID appended to it and that's the reason why we get the USERID following the name of the user who published the files. **Resolution** Introduced 3 new keys as firstname,lastname,userId instead of the key username to the file publish template.	**Enhancement**
9	**Portal Topics taking too long to load** – users were encountering a wait time for the portal topics page to load. **Resolution** Backend fix (resolution) that optimized the portal channel/topic loading time.	**Resolved**
10	**Database Tune Up** – Following tasks will be done here. 1. Removing unused indexes 2. Add missing indexes 3. Setting Fill Factor and Pad Index options as necessary 4. Introducing filtered indexes	**Resolved**

	5. Updating index maintenance plan	
11	**Re-categorize Target Subfolder** – Add an option ' **[ ] override subfolder** ' If they click on it, then 'Target Subfolder' option will be enabled. By default, that box will be disabled (gray - cant click on items). *[image of Re-Categorize Documents dialog]* **Resolution** Added **[ ] override subfolder** option bottom of the Category List. By default "Target Subfolder" is disabled and pass default value selected according to the Sub-category. *[image of Document #1 - Billings-Capture-laravel-taxx dialog]*	**Resolved**
12	**Enable Captcha for Portal Contact Us page** – Resolution Added Google Captcha version 2.0 to the portal contact us form.	**Resolved**
13	**Users are not getting email notifications when Task are updated in a Workflow (Projects)** – users where not getting email notifications when a tasks was updated in a workflow (project). **Resolution:** Fixed the issue when user is not getting email notification when Task are updated in Project.	**Resolved**
14	**Linked and Published icon issue** – **Resolution** Disallow to publish/link documents that are marked for deletion and disallow to publish/link linked documents from the linked entity.	**Resolved**

15	**Portal Subscribers not showing in Publish screen** – Try to publish a document. The primary client portal subscriber does not show up in the portal topics list, even though he is a subscriber to the portal and assigned to several portal security groups (Tax, A&A, Confidential, Client Documents, as example).	**Resolved**
16	**Copy feature is allowing documents in root site instead of under category directory** – Copy/Move now puts the file in the correct directory based on the category.	**Resolved**
17	**Show Client numbers in the Portal** - If the corresponding internal site has an FEIN number, then it is shown next to the client name in both the left side filter and the Selected Sites dropdown.	**Resolved**
18	**Error restoring previous version in Version and Open** – restore feature was not showing the previous version.	**Resolved**
19	1. **DocuSign integration updates** – DocuSign requesting to sign in every other time, and doesn't see work in chrome. **a:** *"sign in"* - most of the time a user gets a prompt from DocuSign to enter credentials and say someone is already signed in - when trying to send documents to esign with iChannel **b:** *"in chrome"* - it may be happening on IE too 2. "with chrome browser, DocuSign never comes up when try to send to DocuSign 3. Slowness 4. Only works with PDF files, it should work with other types. 5. If #4 happens - we still mark the Document sent to eSign (red pen) but actually not. 6. Is there a way to eliminate seeing 'inactive' contacts in the list, when sending an item via DocuSign? When choosing a contact to send a DocuSign document to, inactive contacts are listed as choices to select. **Resolutions** 2. Issue occured due to document type detail has not set when creating esign request. Added document type details with document details. 6. removed inactive contacts from the contacts list 4,5. giving a warning message as ichannel only support for pdf files, when user trying to docusign other file types. 7. when submit to the docusign, document image will mark with red icon. if user canceled submitting the document from next view, within the next	**Resolved**

	polling cycle , red colored icon will remove from the document since it has not submitted to docusign, Sql script added for troubleshooting purposes Database/Troubleshooting Scripts/docusign troubleshoot.sql		
20	**Security for Publish/Link in Global Permissions not setting proper flag for security group.** In the Global permissions the option Publish/Link is not setting setting the flag in the database tchsecxgroup.dbf. It only adds the flag which will only allow users to access the publish pages and not the link pages. The site permissions have the option separate and permissions on the site level allow access to link option and publish option. **RESOLUTION** Publish and Link are now separate options in Global permissions.	**Resolved**	
21	**Names are not showing in the drop-down for routing** **Resolution:** In the **Assign To** page, 1. The dropdown will display all the **Users** regardless of admin or non-admin. 2. The dropdown will display all the **Groups** (routing enabled) regardless of admin or non-admin.	**Resolved**	
22	**iChannelDesk: publishing a document through ICD is not working properly.** When login in from web internal, Added document through iCD will be visible in the file area, but the document does not display as a published document **Expected Result:** The document should get published to the selected channel when the user checks the Publish checkbox in iCD.	**Resolved**	
23	**Entity details page	unable to add "Addresses & Phone Numbers" data record to entity details page –** users were not able to add an address to the	**Resolved**	

	grid. A user should be able to add address to the "Address & Phone Number" gird. **Resolution**: When adding an address & phone details there was an issue to link it with the entity. it was fixed by changing the entity id value generation code, now the correct entity details are used to link the address book details.	
24	**Discussion Notes Email has insufficient information** When choosing to email a Discussion note from a project, the resulting email does not contain much useful information. The email should be modified to: • Remove the "^^^" at the top • Add the Project Name and make it a hyperlink to the project • Add the client name for whom the project is for An example of the current message is below: Testing discussion note email _____ ^^^ _____ Posted by: brian.gage Subject: Testing Site Code: ROOT MessageId: M000000007 Please do not reply to this e-mail message. This email address is not designed to receive your messages. **Resolution** • Removed the "^^^" at the top. • Added the Project Name and made it a hyperlink to the project.	Resolved
25	**Not displaying newly created Tasks on the task widget on the Dashboard** – when a new task was created by a user, the new task would not update and be visible on the task widget on the dashboard. **Resolution**: all tasks will show in the My Task widget even if the task is not associated or linked with a Workflow (Project).	Resolved
26	**SCOPE_IDENTITY() @@Identity issue** - The SCOPE_IDENTITY() and @@IDENTITY calls in VFP (iccursoradapter.prg) continues to be an issue, particularly with PKF. The scope of this task is find a way to replace these calls by using different logic.	Resolved

27	**"This document has never been assigned" Error Message displayed in the document assign to page** – users were encountering an error message "This document has never been assigned" in the document assign to page under each file. **Expected behavior** Code should not display in the web pages. **Resolution** Removed misleading and error causing code.	**Resolved**
28	**Documents marked for deletion and files added through a link are allowed to be Published and/or Linked** – **Actual Result:** • When users select the above document and when try to link again, **The Link button is enabled.** • When the user selects the above document and then try to publish again. **The publish button will be enabled after selecting the channels/topics** **Expected Result:** The document created after link and the documents marked for deletion should not be able to Link , Publish or Link/Publish	**Resovled**