



Release Notes

V 2.20.9





iChannel Resolutions and Enhancements v 2.20.9 3





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iChannel Bugs and Enhancements		
1	<p>Recategorizing CaseWare Files – when users would move or re-categorize CaseWare binders (.AC files), all associated files (PDFs & DOCs) would also need to move as or re-categorize as well.</p> <p> Resolution – all files now are move and/or re-categorized</p>	Enhancement
2	<p>Change Widget to use “select distinct...” when populating status dropdown– Development has fixed project filtering for project subtype, project status and task status, a byproduct was it has caused what appears to be a lot of duplicate statuses in the dropdown for the My Tasks and My Projects widget on the dashboard. By changing the SQL statement used to populate this dropdown to say, "Select distinct...." rather than select all non-unique statuses. This will work fine for My Tasks because task status is stored in plain text in cStatus in tAction. And even though project status is stored as an nid in nTaskStatusID in tTask, it still appears to work if you do a "Select distinct..." because selecting a single status in the My Projects dropdown will show all projects with that status, regardless of project type.</p> <p> Resolution – issue is not longer experienced.</p>	Enhancement
3	<p>Enhanced Contact Search Functionality by Last Name – In a previous release, we made changes to the Contact search screen to force users to enter at least 2 characters in one of the search fields before allowing the search. This is due to many clients locking up their SQL server by performing a search to bring back all Contacts in the database.</p> <p>However, this new feature impacts some clients’ ability to use the grouping capability in the Contact search results screen. They like to be able to search for all contacts and then select one by one from the resulting list into pre-established groups.</p> <p>To keep this functionality, yet not allow users to lock up their SQL server, we will develop a new search capability from the Contacts search page. In the “Other Contact Search Fields” frame, inside the “Global Groups/Lists” section, just below the current “Display Columns” dropdown, add a new dropdown labeled “Last Name Starts”. Populate this dropdown with a blank and 4 new fields: A-D, E-K, L-Q, and R-Z.</p> <p>When anything is selected from this dropdown, the “Last Name” search field should be grayed out and read-only, and when clicking search, the other search parameters populated should combine with whatever is selected from</p>	Resolved





	this new dropdown to provide results. If only the dropdown is selected, then the search should return those contacts whose last name begins within the letter range selected.	
4	<p>iChannel no longer allows for duplicate Subscribers to be created for Portal use. – When a user selected a document(s), clicked Publish and would return to view the Document Properties. The document would show the “Publish Coy Permanent” checkbox as checked.</p> <p> Resolution: Duplicate subscribers in the same root site cannot be entered. Duplicate contacts in the same root site cannot be entered.</p>	Resolved
5	<p>File Area When documents get uploaded it does not get selected to a default category – issue has been resolved to identify the default category.</p>	Resolved
6	<p>Security group title is displayed as a Portal Security group in the [conarcroot site] detail page –</p> <p> Resolution – Title should be in Security Groups</p>	Resolved
7	<p>Unlink document(s) not showing names using IE – users were encountering when Unpublishing/Unlinking document(s) in IE, no entity listing is showing.</p> <p> Resolution – document names are now displaying.</p>	Resolved
8	<p>Green Arrow not showing for a regular user in iChannel - Summary of issue: Green arrow not showing for regular users. Green arrow only shows for admins only.</p> <p> Resolution – document names are now displaying.</p>	Resolved
9	<p>User were receiving an error message when publishing to ICD.</p>	Resolved
10	<p>ICD Addin crash on latest Outlook and Quickbooks plugin – with a change / update to the latest Redemption.dll, issue resolved.</p>	Resolved
11	<p>Missing Delete Button on Task for Non-Admins – When you log into iChannel as an admin, open a project and click on a task subject to open the Activity screen, the Delete button under the Save button is available. However, if you log in as a non-admin, the Delete button is not showing. We have checked and the user has Activity Delete rights.</p>	Resolved
12	<p>Adding the greater > or lesser < sign to be allowed in password creation.</p>	Resolved
13	<p>Systems Can not add internal subscribers:</p> <p>Recreate:</p> <ol style="list-style-type: none"> 1. Login to ichannel 2. Click Systems 3. Click Root link (ex: Conarcroot) 4. Click Add Contact button 	Resolved





	<ol style="list-style-type: none"> 5. Fill Email, First name and Last name 6. Click Save 7. Click Subscriber 8. Click Save <p>Actual Result: When adding a new internal subscriber, giving an error as “This contact is already a portal subscriber“ .</p> <p>When checked that contact subscriber status, contact shows as not a subscriber.</p>	
14	<p>Publish and Link Calendar chooser not viewing the calendar –</p> <p>Recreate:</p> <ol style="list-style-type: none"> 1. Login to iChannel internal 2. Go to a file area of an entity 3. Select a file 4. Click Gear icon 5. Click Publish and link / Publish only / Link Only 6. Click on Calendar icon to select an expire date <p>Actual Result: Calendar not viewing to select a date.</p> <p> Resolution: Calendar pop was added and implement the new data validation functions.</p>	Resolved
15	<p>File Area Search the email icon navigates to the email inbox with old file area - Steps to re-produce:</p> <ol style="list-style-type: none"> 1. Login to the ichannel internal 2. Navigate to the Files tab 3. Search for file areas 4. Then click on the Email icon of a search record <p>Actual Result:</p> <p>Navigated to the Email inbox page. Through this page can access the old file area</p>	





	<p>Expected Result:</p> <p>The filter header component should be removed from the email inbox page. This will restrict users by clicking on List All button and accessing old checkin/out pages with other file area functionalities.</p>	
16	<p>Completing project does not show complete date - When you click the completed checkbox in a project, the date does not show for completion until after you save the project. Once you save the project, it does not automatically default to today's date as it should. The problem was found in the TASKEDIT template in this section: the Off and On's were backwards, causing the date to only show when the project was not completed, rather than when it was completed.</p> <p> Resolution: Completing a project by checking "Completed" should expose the date Completion box with [today's date]. Unchecking should hide the date field.</p>	Resolved
17	<p>Issue in Routing Scan template - In SCANROUTE1 there is a type causing documents to not route properly. it's adding a - at the end of the name of the document</p> <p>OLD: <code><img src="common/barcode.aspx?<%=Substr(IcDocumentID,4)%>- " /></code></p> <p>NEW: <code><img src="common/barcode.aspx?<%=Substr(IcDocumentID,4)%>" /></code></p>	Resolved
18	<p>Issues with dragging files into iChannel and uncheck – Users get to this point and as soon as I hit 'add' I get the error page and the balance of items that are not check marked will just disappear and I have to go back to my folder and drag them to the upload box one at a time.</p> <p>I do not get the error unless there are items that are not check marked to go into the same category.</p> <p> Expectations: After clicking save the document should upload the check file into iChannel. Then provide options to the uncheck file. "the reason for letting users uncheck after dragging is so if users are changing files to, say 2 different categories, users can do the drag all at once for all the files, then process them as a group per category".</p>	Resolved
19	<p>Error Copying CCH Engagement Files into iChannel –</p> <p>Summary of issue: When you click "copy to iChannel" getting a dot net error.</p> <p>How to replicate issue: Open engagement in iChannel. Check boxes for engagement documents.</p>	Resolved





	<p>Once checked use the gear drop down to copy to iChannel' Get a dot net error.</p> <p>Expectations: Once you click on the "copy to lchannel documents should be upload to the file area.</p>	
20	<p>Title Change with Recategorize - When recategorizing a document in the file area, there is an additional feature that allows you to change the Title of the document at the same time. This is not working. No matter what you change the title to, it does not change once the recategorization is complete.</p>	Resolved
21	<p>Duplicate subscribers' issues - When adding a new contact, recent validation changes allow contact with the same first and last names as long as the email address is not the same. However, in this scenario, a "Contact is duplicated message will also be displayed.</p>	Resolved
22	<p>File Area file download issue – Cannot view an uploaded file after its downloaded. Expectation result was the file should open successfully.</p>	Resolved
23	<p>Recategorize does no work for some entities – user would encounter when recategorizing files that it wouldn't perform as expected with some entities.</p>	Resolved.

