



Release Notes

V 2.20.6





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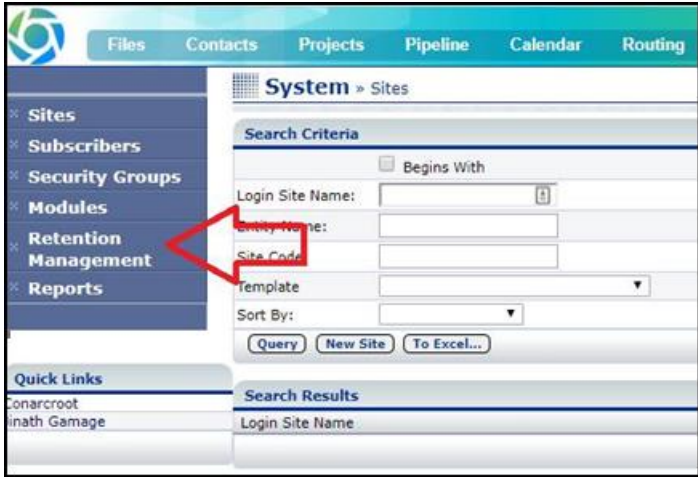


iChannel Retention Module – Overview (new v 2.20.6)

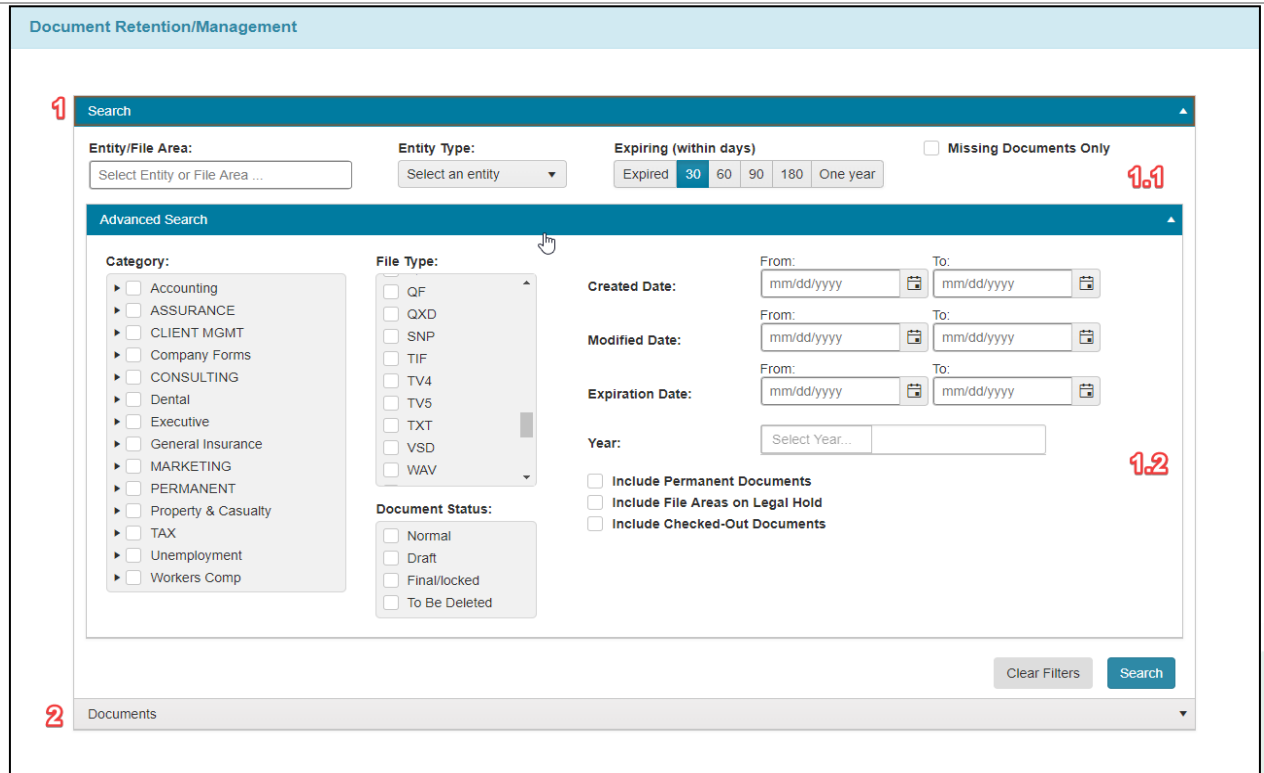
iChannel Retention Module provides clients with the ability to identify the parameters when archiving and setting retention policies on documents. Below will provide an overview of the features and functionalities. To *access* the **iChannel Retention Module** (Administrative permission): **System tab > Retention Management**.

How to Access iChannel Retention Module

Steps for How to Access iChannel Portal

| Step | Action |
|------|---|
| 1 | <p>Clients will access System tab > Retention Management.</p> <ul style="list-style-type: none"> Contact your Organization Contact representative if you need assistance with accessing iChannel Retention Module.  |
| 2 | <p>After accessing the Document Archiving and Retention Management link, the first window to display will be the Search section. On the Search window, users have access to:</p> |





1 – Search

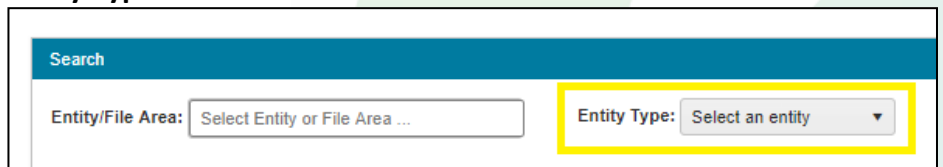
1.1 – Quick Search

- Allows users to filter documents from frequently used search criterias. Filter options:

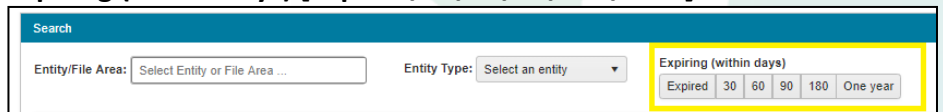
- Entity | File Area



- Entity Type



- Expiring (within days) [Expired/30/60/90/180/Year]



- Missing Documents Only - Missing Documents is a checkbox; when checked, the returned results are documents that exist in the database, but do not actually have a matching physical file in the identified document path in the file server.. In other words, this will return missing documents

from the physical hard drive, but still recorded in the database Document table.

The displayed File Path is the root folder structure, plus the filename.

Expiring (within days)
Expired 30 60 90 180 One year
 Missing Documents Only

○ 1.2 – Advanced Search

- Advanced search filters allow users to further fine tune the search result if the job done by quick search filters are not granular enough. The following search filters are available in advanced search for the user to use:

- **Category**

Advanced Search
Category:
 Accounting
 Accounting Reports
 AP
 AR
 Bank Rec & Statements
 Financial Statements
 JVs
 Payroll
 Tax Reports & Forms
 Tax Returns
 ASSURANCE
 CLIENT MGMT
 Company Forms
 CONSULTING
 Dental

- **File Type**

File Type:
 AC
 AC_
 ACCDB
 APP
 APP
 AVI
 BMP
 CDB
 CDB
 CSV
 DOC
 DOCX
 DOT
 DSW
 EML

Document Status:

Normal
 Draft
 Final/locked
 To Be Deleted

- **Document Status**

DOT
 DSW
 EML

Document Status:

Normal
 Draft
 Final/locked
 To Be Deleted



Created Date (range)

Created Date:

Modified Date:

Expiration Date:

Modified Date (range)

Created Date:

Modified Date:

Expiration Date:

Expiration Date (range)

Created Date:

Modified Date:

Expiration Date:

Year

Expiration Date:

Year:

Include Permanent Documents (checkbox)

Year:

Include Permanent Documents

Exclude File Areas on Legal Hold

Include Checked-Out Documents

Include File Areas on legal hold (checkbox) Include Checked-out Documents (checkbox)



Search

Entity/File Area: Entity Type: Expiring (within days) Missing Documents Only

Advanced Search

Category:

- Accounting
- Accounting Reports
- AP
- AR
- Bank Rec & Statements
- Financial Statements
- JVs
- Payroll
- Tax Reports & Forms
- Tax Returns
- ASSURANCE
- CLIENT MGMT
- Company Forms
- CONSULTING
- Dental

File Type:

- AC
- ACV
- ACCDB
- APP
- APP
- AVI
- BMP
- CDB
- CDB
- CSV
- DOC
- DOCX
- DOT
- DSW
- EML

Created Date: From: To:

Modified Date: From: To:

Expiration Date: From: To:

Year:

Include Permanent Documents
 Exclude File Areas on Legal Hold
 Include Checked-Out Documents

Normal

Draft

Final/locked

To Be Deleted

2 – Documents (Search Results)

- The **Search Result** is a table/grid which shows the important attributes of document records matched with the filter criteria

Document Retention/Management

Search

Documents

| <input type="checkbox"/> | Client (Document) | Document Code | File Name | File Type | Created Date | Last Modifie... | Document State | File Size | Location |
|--|---|---------------|--|-----------|--------------|-----------------|----------------|-----------|---|
| Entity Name: Central Maine Power | | | | | | | | | |
| <input type="checkbox"/> | 2014-erins test site case studies-freedom home care-03102014_0255pm | DOC003797 | 2014-erins test site case studies-freedom home care-03102014_0255pm.pdf | PDF | 01/30/2015 | 03/10/2014 | Normal | 275.1KB | \\CHANNEL\CENTRAL\ERINS TEST SITE\ |
| <input type="checkbox"/> | 2014-erins test site case studies-georgia community support-03102014_0255pm | DOC003798 | 2014-erins test site case studies-georgia community support-03102014_0255pm.pdf | PDF | 01/30/2015 | 03/10/2014 | Normal | 80.4KB | \\CHANNEL\CENTRAL\ERINS TEST SITE\ |
| Entity Name: Corneila Brown | | | | | | | | | |
| <input type="checkbox"/> | Correspondence-Insured Consent Form (1) | DOC0006996 | 2014-Corneila Brown-Correspondence-Insured Consent Form (1)-1132014 122356PM.docx | DOCX | 11/03/2014 | 11/03/2014 | Normal | 16.6KB | \\CHANNEL\CENTRAL\PROSPECT\CO... BROWN\ |
| Entity Name: Dental | | | | | | | | | |
| <input type="checkbox"/> | COBRA-Filing No S-FB-00145 | DOC0037001 | 2014-Dental-COBRA-Filing No S-FB-00145-1132014 122649PM.pdf | PDF | 11/03/2014 | 11/03/2014 | Normal | 233.9KB | \\CHANNEL\CENTRAL\INS\DENTAL\ID... |
| <input type="checkbox"/> | COBRA-Insurance Claim | DOC0037002 | 2014-Dental-COBRA-Insurance Claim-1132014 122546PM.pdf | PDF | 11/03/2014 | 11/03/2014 | Normal | 2763.1KB | \\CHANNEL\CENTRAL\INS\DENTAL\ID... |
| <input type="checkbox"/> | COBRA-Insured Report Claim | DOC0037003 | 2014-Dental-COBRA-Insured Report Claim-1132014 123649PM.pdf | PDF | 11/03/2014 | 11/03/2014 | Normal | 2768.7KB | \\CHANNEL\CENTRAL\INS\DENTAL\ID... |
| <input type="checkbox"/> | Participation Agreement-Patient Filing | DOC0006999 | 2014-Dental-Participation Agreement-Patient Filing-1132014 122623PM.pdf | PDF | 11/03/2014 | 11/03/2014 | Normal | 2763.5KB | \\CHANNEL\CENTRAL\INS\DENTAL\ID... |
| <input type="checkbox"/> | Participation Agreement-Patient Form A_16 | DOC0037000 | 2014-Dental-Participation Agreement-Patient Form A_16-1132014 122624PM.docx | DOCX | 11/03/2014 | 11/03/2014 | Normal | 192.7KB | \\CHANNEL\CENTRAL\INS\DENTAL\ID... |
| Entity Name: Information Technology | | | | | | | | | |
| <input type="checkbox"/> | TEST FILE_20180612_1320 | DOC33635 | 2018-Information Technology-Accounting Reports-TEST FILE_20180612_1320-6122019 12421PM.TXT | TXT | 06/12/2018 | 06/12/2018 | Normal | 0KB | \\channel\central\gibberts for kkb\ |

3 Published Documents - If a document is published and not yet an expired document, that document will be indicated in the search result with the “Published” icon, as shown below.

| | | | | | | | | | |
|--------------------------|---|-----------|---|-----|------------|------------|--------|---------|------------------------------------|
| <input type="checkbox"/> | 2014-erins test site case studies-freedom home care-03102014_0255pm | DOC003797 | 2014-erins test site case studies-freedom home care-03102014_0255pm.pdf | PDF | 01/30/2015 | 03/10/2014 | Normal | 275.1KB | \\CHANNEL\CENTRAL\ERINS TEST SITE\ |
|--------------------------|---|-----------|---|-----|------------|------------|--------|---------|------------------------------------|

4 Export to Excel – the searched results can be exported as an Excel file.



iChannel Bugs and Enhancements v 2.20.6

| iChannel Bugs and Enhancements | | |
|--------------------------------|--|-------------|
| 1 | Request Doc – Linked contacts where not displaying when creating an email. When a User created an email, the linked contacts where not displaying. | Enhancement |
| 2 | Request Doc – Change the Description label to read “Title” with a hover tip. [Access a client file area click New Folder icon click Copy to Clipboard on Request Document access the link] | Enhancement |
| 3 | Office 365 SMTP – new email queuing mechanism to comply with Office 365 SMTP limits | Enhancement |
| 4 | CRM When creating entity related activities, for the entity field, the entity does not get set by “default” for non-admin users – entity was not being set by default in Create Activity form. Expected: for entity related activity creation, entity should set by “default” for Entity field. | Resolved |
| 5 | File Tab – Date time picker is missing in the Document Search field. | Resolved |
| 6 | iChannel Portal – Request Documents – the count indicator was not displaying on the request document grid categories. | Resolved |
| 7 | Salesforce Contacts gets synced as linked and primary contact for each linked entity – Actual: for primary entity, contact got added as a primary contact. For other linked entities, contact links as a linked contact and also as a primary contact. Expected: available entities, the contact should be synced as a linked contact only. For primary entity, contact should be added as the primary entity only. | Resolved |
| 8 | Email – remove unnecessary loops for email sending - in several places in iChannel where when sending email notifications was generating a loop which can be sent as single email with delimited to list. Unnecessary loops are now removed. | Resolved |
| 9 | System tab – Navigate to the System tab, the rendering of the left navigation pane was not rendering correctly. | Resolved |
| 10 | File Area – API failed in the file area folder creation when using the API. | Resolved |
| 11 | Request Docs Internal User notification – if the internal user has an invalid or empty email address, the request doc notification will fail. Email notification for the valid users should be sent. | Resolved |
| 12 | Request Docs Send the Request Link – Send the Request link though Request Docs option in a client file area, the VFP link will not be re-directed to the .NET link. | Resolved |
| 13 | System Reports – Report section UI inconsistent and icon images are missing. | Resolved |



| | | |
|-----------|---|------------------------|
| |  | |
| <p>14</p> | <p>Workflows (Projects) Page Load error – Click Projects Click Add button Go to Contacts tab Try to search a contact and add a contact to the project</p> <p>Actual: In Newly creating and already created projects a "Page loading error" comes as below. Contact tab does not show internal subscribers list by default Contact search does not give an contact search results</p> | <p>Resolved</p> |
| <p>15</p> | <p>Retention Files Delete – Files Delete feature displaying the status as "Failed".</p> <p>Steps to reproduce:</p> <ol style="list-style-type: none"> 1. Log in to the Dashboard. 2. Navigate to an Entity and upload a file to that entity. 3. Navigate to the file directory and delete that file from the file directory. 4. Navigate to the retention module 5. Search on that entity name and do the delete function. <p>Actual Result: File delete status displayed as Failed.</p> <p>Expected Result: File delete status should display as Completed.</p> | <p>Resolved</p> |



Policy: Delete
Status: Completed

100%
33/33 documents are processed

Successful Document Count: 32

Failed Document Count: 1

More Info

| File Name | Archive Status | Delete Status | Updated On |
|--|----------------|---------------|---------------------|
| 2019-Accounting-FNamest113-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest107-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest108-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest109-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest105-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest106-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest100-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest101-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest102-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest103-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest104-2242020.txt | Not Applicable | Completed | 03/01/2020 10:52:12 |
| 2019-Accounting-FNamest100-2242020.txt | Not Applicable | Failed | 03/01/2020 10:52:11 |

More info grid only shows the most recent document records, Please use **Export to Excel** feature for complete document list.

[Home](#)
[Export to Excel](#)

