End User Guide

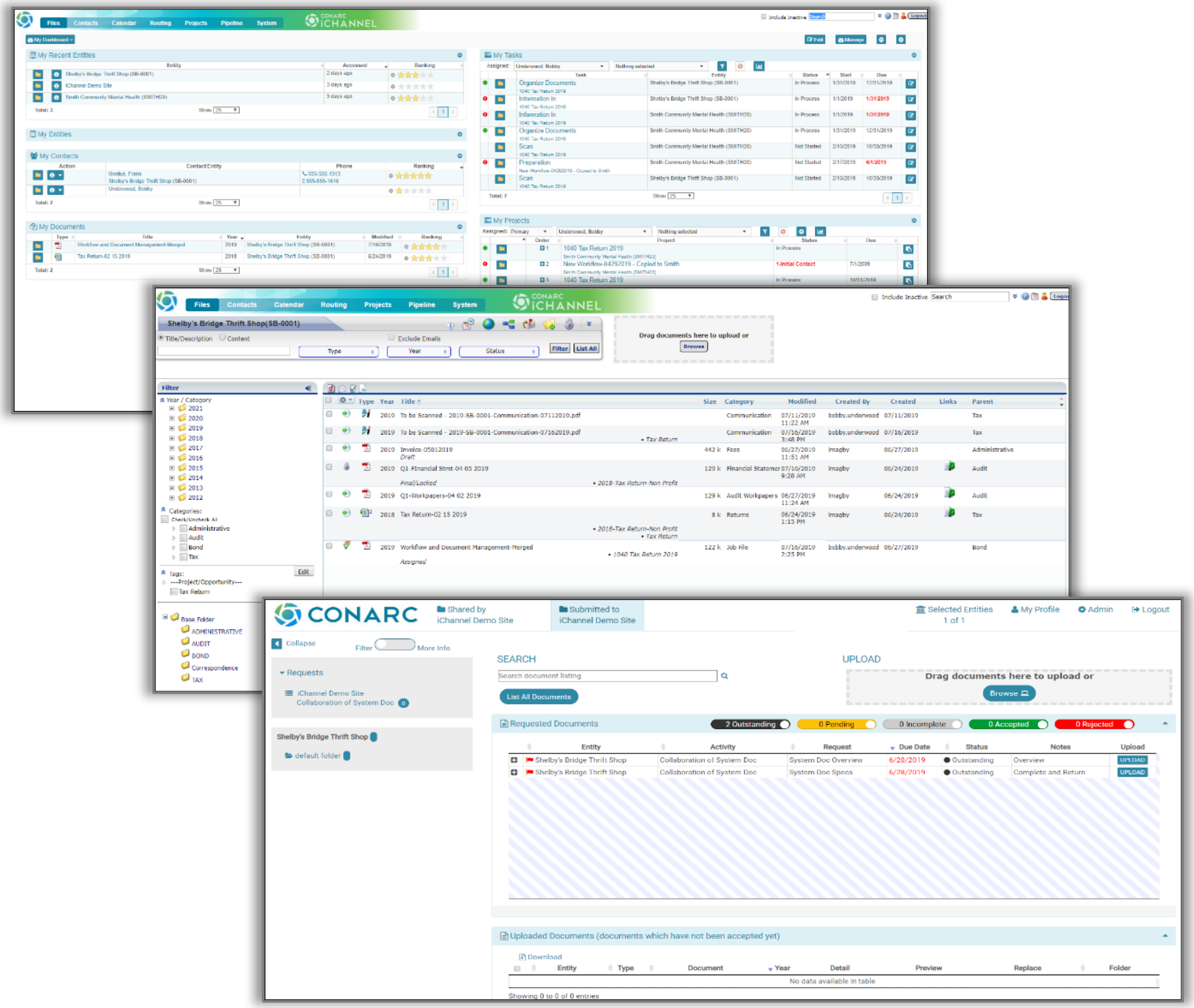
Owner's Manual

iChannel – Course Overview

Welcome to iChannel End User course training

iChannel is a web-based, Collaborative Content Management System with extensive document search and sort capability, document versioning, online discussions, integrated email functionality that provides your organization's information to be accessible by anyone, at any time, from anywhere. iChannel facilitates is powerful end user solution in a centralized system that facilitates communication and collaboration within and across your organization. The result is a paperless office environment which promotes efficient, simple, high-speed access to your data with a click of a mouse.

The iChannel Portal feature allows all the features and benefits of iChannel to extend to your clients and other organizations that you choose to share information and collaborate with.



Course Overview

Identifying the core building blocks and concepts of iChannel is vital in understanding how the centralized system is used to identify, categorize and store your organization's important documents. With iChannel, users in your organization will:

- Standardize procedures
- Increase efficiency
- Enhance client services

This iChannel course is organized into modules and as an exercise-based approach with a combination of group discussions and hands-on application simulations to establish a foundation for iChannel.

Throughout this course, you will practice working with what you learn with the use of instructor, group and self-paced, and knowledge checks exercises designed to apply to your own business model and business policies and procedures.

The following illustration provides an overview of the workflow process for iChannel presented in this course.

Your organization will determine your security profile. Therefore, certain iChannel modules, features (ability to view | add | edit | delete) might not be within your access.

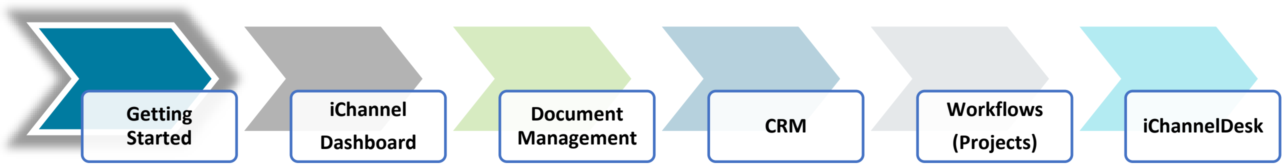
If you feel you should have access to any feature, please contact your System IT Administrator.

Module 1: Getting Started with iChannel

Administrators and End Users have easy access to iChannel and iChannelDesk. Depending on your needs and permission level, your system administrator can grant or limit as many of the iChannel features as necessary. A login will be required for anyone within the organization who will be using iChannel tools and features and/or requires access to any module within iChannel.

Module Overview

The follow exercise will introduce the building blocks and tools of **Getting Started with iChannel**.



Login to iChannel

Steps for Logging in to iChannel

Step	Action

1	Enter your defined **iChannel URL** address in a browser window.
	• Go to https:// ________________________________ to access iChannel
	
	Browsers and Resolutions recommendations
	• Desktop – supported Browsers for Direct Mode editing:
	  ○ Microsoft Internet Explorer v11.379 and above
	    ▪ IE Edge is not supported.
	  ○ Google Chrome v72.0 and above (only for Windows)
	• Resolutions – recommended screen resolutions:
	  ○ 1280 x 1024 (5:4 ratio)
	  ○ 1920 x 1080 (16:9 ratio)

2	In the **User ID** field, *enter* your organizational specific **User ID credentials**.

3

In the **Password** field, *enter* your unique password (remember Passwords are case sensitive).

- **User ID & Passwords** requirements vary by organization. Please contact your system administrator for your unique User ID and Password requirements.

4

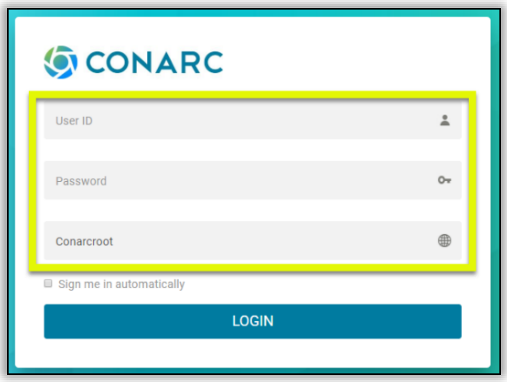
In the **Site Name**, your organization name should be displayed.

- Your organization Site Name is:

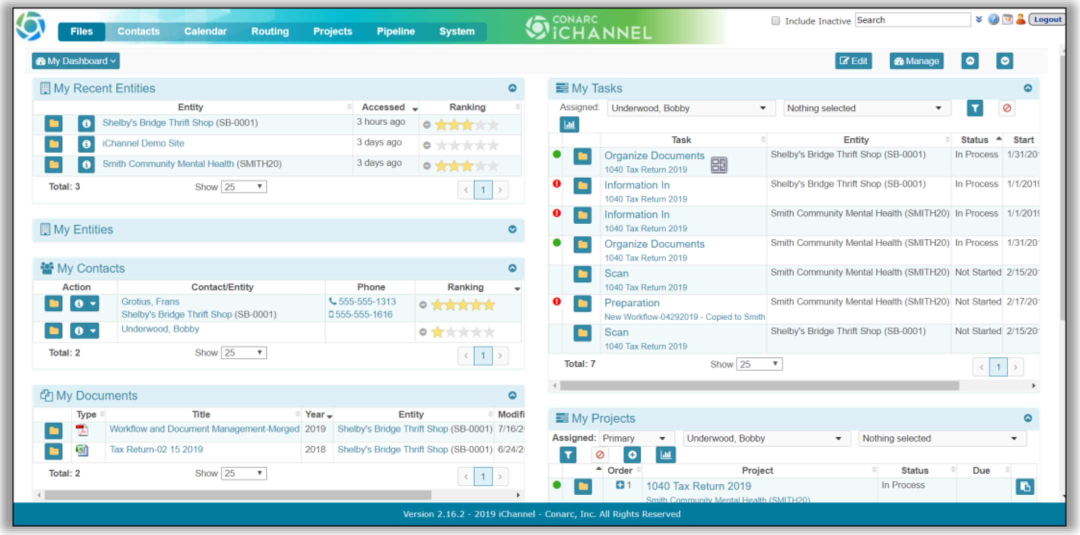
  ____

Check the **Sign me in automatically** check-box if you want iChannel to remember your Login credentials.

Click the **Login** button.



Once logged into iChannel, the first screen that will display is the **iChannel Dashboard**.



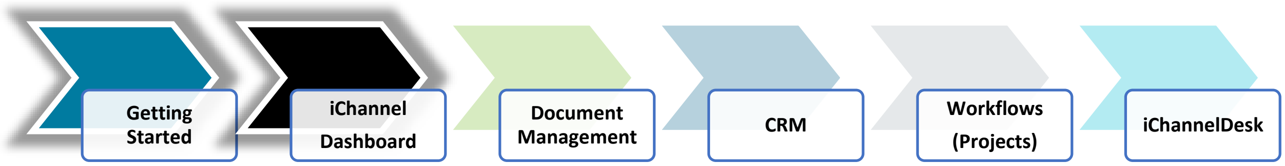
Module 2: iChannel Dashboard

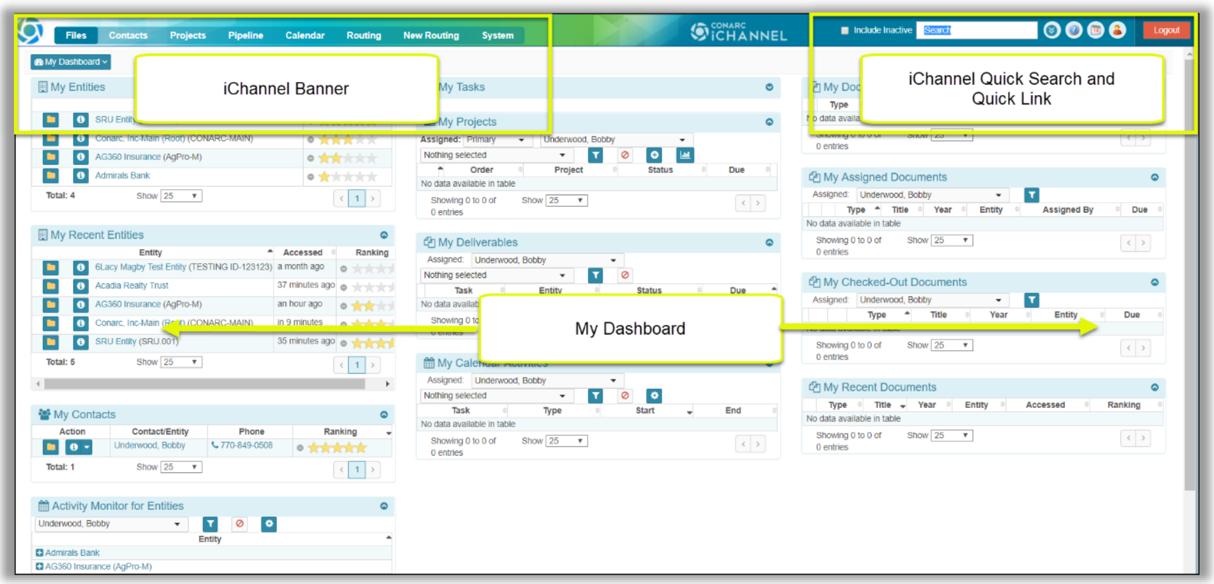
Once logged into iChannel the **iChannel Dashboard** is the first window you will see. The iChannel Dashboard displays a summary of your personal settings, or Widgets. There are three (3) main areas on the iChannel Dashboard.

- iChannel Banner
- iChannel Quick Search and Quick Links
- My Dashboard

Module Overview

The follow exercise will introduce the building blocks and tools of the **iChannel Dashboard**.





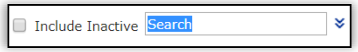
iChannel Banner

- ***iChannel Home icon*** – "your" company logo will always display at the top left. Clicking your company logo will always take you back to the iChannel Dashboard from any window in iChannel.
- ***iChannel Modules*** – the navigation module(s) provide quick access to different areas of iChannel including:
    - *Files* – allows users to search for documents across Sites

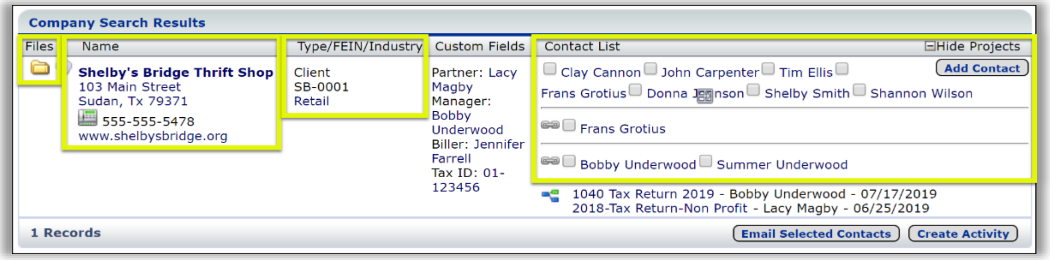
- *Contacts* – allows users to search for Contacts and/or Sites based on more specific information.
- *Workflows* – allows users to see all Workflow Projects and have more searching capability and reporting.
- *System (Admin Module only)* – allows Administrator system admin rights to iChannel.
  - Additional details on each iChannel Module will be detailed further in this guide.

Quick Search

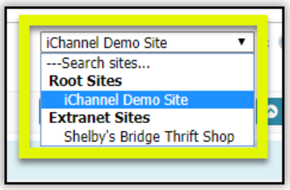
- ***Quick Search*** - allows users to quickly search for Sites or Contacts. To perform a quick search, you will need to enter at least *3-characters* in the search field. If you want to include inactive sites | contacts in your search, put a check in the *Include Inactive* checkbox.



- ***Quick Search Results***
  - *Select* the **Folder icon** to access the Document Management Area for documents associated with the Site.
  - *Select* the **Sites Name** to access the CRM Site details page.
  - **Type/ID/Industry** and **Client ID** is provided that links from external applications. I.e. – STAR, Practice Managements, Salesforce, to name a few.
  - **Contacts** – list the Main Contacts, Linked Contacts, Internally Assigned Contacts for that Site.



- ***Domain (Root) Sites*** – If you have permission to view additional Domain sites, next to Quick Search is a double-down-arrow, click the arrows. The Quick search changes to a drop-down (Access to other domain sites depends on your security. Not all users have access to other sites and will not see them listed if access is restricted).



- ***iChannel Support*** – click to access iChannel Support.
- ***My Activities*** – click to access activities associated with your User ID across all Sites.
- ***User Profile*** – click to access and edit information in your profile. (i.e. updating your email signature for sending emails from iChannel).
- ***Logout*** – click the Logout button to securely log out of iChannel.

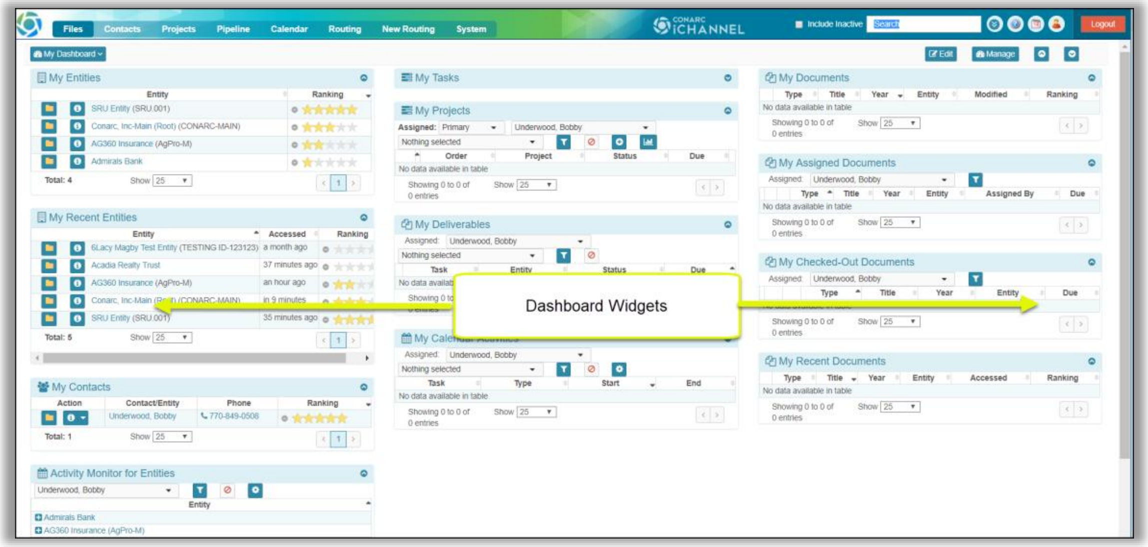
My Dashboard

- ***Edit*** – click Edit to open the iChannel My Dashboard editor to customize your dashboard.
- ***Manage*** – click Manage to open the iChannel Manager Dashboard options.
  - ***iChannel Widgets*** – customizable area where each user can define unique "widgets" to display vital information about their clients, documents, workflows, tasks, to name a few.

> Items that appear on your iChannel Dashboard are controlled by your System IT Administrator and your iChannel Security Group settings.
>
> Please contact your System IT Administrator if you do not have access to all features on the iChannel Dashboard.

iChannel Dashboard – Widgets

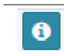
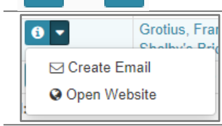
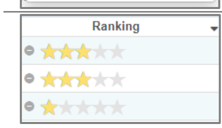
The iChannel Dashboard is highly customizable area where each user can define unique Widgets to display vital information that is important to that user to manager their clients, documents, workflows, and tasks, to name a few.



Module	Widget	Description
CRM	**Activity Monitor for Contacts** **Activity Monitor for Entities**	Displays the **Activities** for the **Contacts** and **Entities** you have selected for My Entities & My Contacts. Settings let you choose the contact list and number | date range of the activities.
	My Calendar Activities	Display a list of the **Calendar Activities** you are associated with and the settings let you choose the person, status, and date range to be displayed.
	My Contacts **My Entities**	**My Contacts** & **My Entities** display a user's "bookmarked" contacts and File Area. Each user will select a **Star Rating** for Clients | Sites and Contacts to have them displayed on their dashboard. Once displayed, users have *one-click access* to the Document Management Area, Discussion, Activities, & CRM record or that Client | Site or Contact.
	Recent Entities	The recent client's area **provides links to the client area** you have last accessed. The latest one will be placed on top and move down the list as you visit other file areas. You may click on the folder to go to the document management area for that client.
Files	**My Assigned Documents** **My Checked-Out Documents** **My Documents**	Display the documents you have checked out and their **due date**. Also displays any documents that have been assigned to you and the corresponding due date.
	Recent Documents	**My Recent Documents** provide links to documents you have recently accessed. You can click the folder icon to go to that client document management area or click the document name to open the document. Use the **Star Ranking** to bookmark the document on

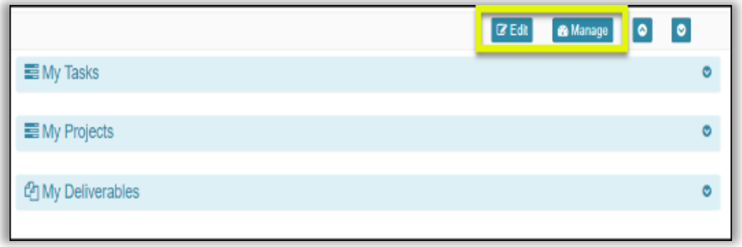
		your dashboard. The **Type** column displays the file format for the document.
Projects	**My Deliverables**	This widget is for users of the Workflow Module that are using the Custom Deliverable grid. Displays the Deliverables and due dates for the Projects you are assigned to. Each Deliverable will be associated to a status to show their progress. **RED** – overdue. **YELLOW** – on-hold. **GREEN** – in-progress.
	My Projects	My Projects (Workflows) display all the workflows where the user is listed as the "primary" contact person. Tasks are listed by the order number. Viewable information includes the project name, due date and any assigned Workflows. Sites listed for the workflow are also displayed in the widget. Each Workflow will be associated to a status to show their progress. **RED** – overdue. **YELLOW** – on-hold. **GREEN** – in-progress.
	My Tasks	Display a user's designated tasks that have not been completed. Clicking on the checkmark icon (far right) will mark the task as "Complete". Use the Assigned drop-down list to see other users assigned Tasks, Sites listed within the widget.

Dashboard Layout | Icons

Icons	Description
	*Click* the **folder icon** will direct the user to the Document Management Ara for a Site.
	*Click* the **information icon** will direct the user to the Last 10 Activities, Last 10 Discussions, and Quick Add Discussion for that Site.
	*Click* the **My Dashboard icon** to display additional dashboards that you have permission rights to view.
	*Click* the **up-arrow** to **"Hide Widgets"**, *click* the **down-arrow** to **"Show Widgets"**.
	*Click* the **information icon** with the **down-arrow** to quickly Create an Email for that site or to open the site website.
	**Star Ranking** allow the user to "Favorite" a Site, Contact, Documents from 1-5 Stars (5 Highest, 1 Lowest). Once you have ranked with a star, it will show under any widget that begins with "My". To clear a star ranking, *click* on the "**minus**" icon next to the stars.

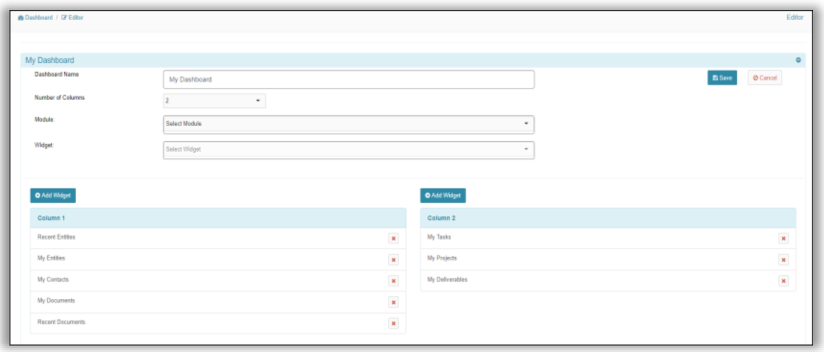
iChannel Dashboard – Customize Your Dashboard Layout | Create New Dashboard (Admin Permission)

If your System IT Administrator | Organization has given you access rights to the **Edit** or **Manage** features; you can add, edit, modify your widgets on your iChannel Dashboard. In addition, your System IT Administrator | Organization might create an organizational "**default**" dashboard for your use.

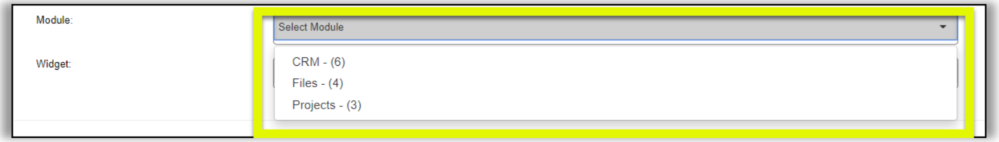


Customizing Your Dashboard

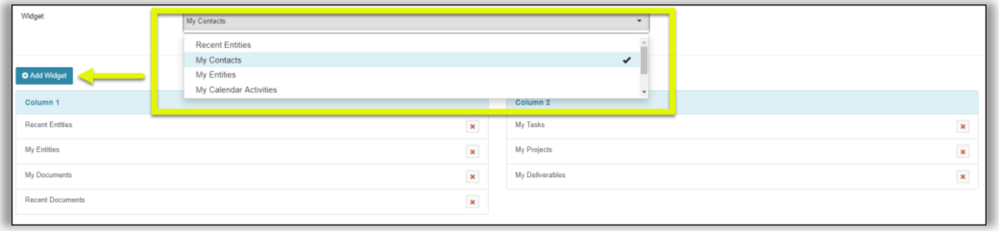
Steps for Customizing Your Dashboard

Step	Action
1	*Select* or ensure "**My Dashboard**" is listed. If not, use the *drop-down arrow* to find the dashboard you want to customize. *Select* the  (Open Editor) icon, the **My Dashboard Editor** window will display.  

2	To update the dashboard name, *enter* a new name in the **Dashboard Name** field.
	To update the **Number of Columns** that will display on the dashboard, *click* the **drop-down arrow** and *select* either **1**, **2**, or **3** columns. (It's recommended to default to two (2) columns).
	To add additional widgets to your dashboard, *select* the **drop-down arrow** next to the **Module** field.
	• **CRM – (6):** six widgets can be added to your dashboard
	  ○ Recent Entities, My Contacts, My Entities, My Calendar Activities, Activity Monitor for Contacts, Activity Monitor
	• **Files – (4)**: four widgets can be added to your dashboard
	  ○ Recent Documents, My Documents, My Assigned Documents, My Checked-Out Documents
	• **Workflow – (3)**: three widgets can be added to your dashboard.
	  ○ My Tasks, My Projects, My Deliverables



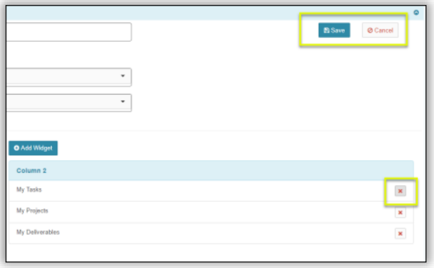
Next, *select* the **drop-down arrow** next to the **Widget** field. From the list, *select* a widget then *click* the **Add Widget** button to add that widget to your column (either Column 1, Column 2 or Column 3, depending on the number of columns you have selected).



3 To order your Widgets, *click + hold down the left side of your mouse*, and **drag the widget** to a new order. The order of the widgets in the Column, determine how they will appear on your Dashboard.

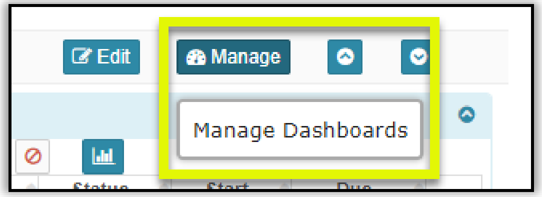
4 To remove a Widget from your Dashboard, *click* the "**red X**" icon next to the widget in the column.

To save your updates, *click* the **SAVE** button. To cancel your updates, *click* the **Cancel** button.



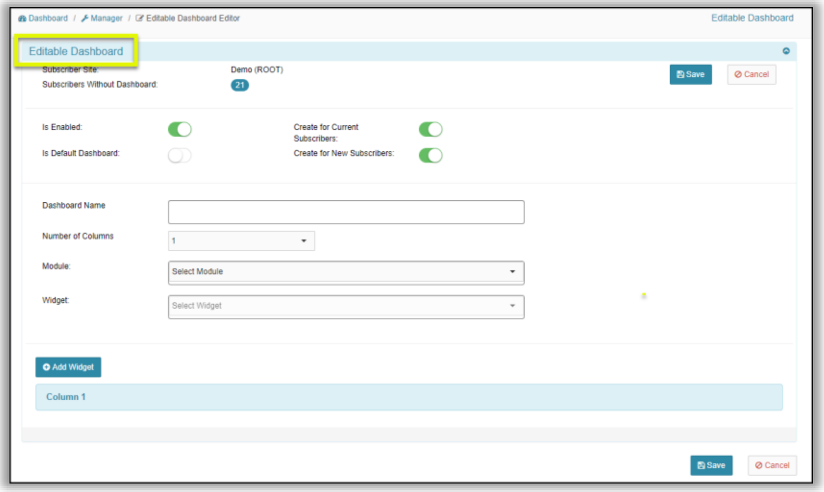
Creating a New Dashboard (Admin Permission)

Steps for Creating a New Dashboard	
Step	**Action**
1	*Select* the Manage icon, the **My Dashboard Editor** window will display.



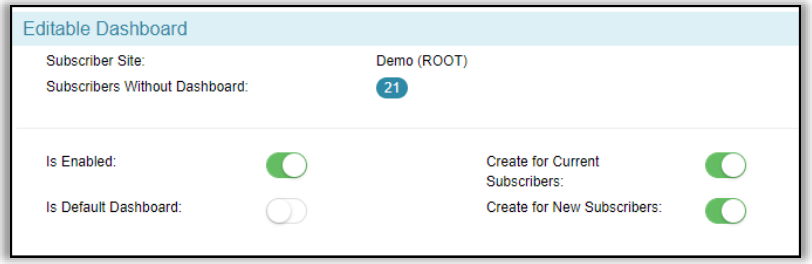
The **Dashboard | Manager** window displays.

2 *Click* Editable Dashboard 3. *Click* Create. The Dashboard Assigned Editor - Admin Mode page displays.



Editable Dashboard

By default, the **Is Enabled "slide-bar"** is *set* to enabled.
By default, the **Create for Current Subscribers "slide-bar"** is *set* to enabled.
If the new dashboard is to be the "default" dashboard, *move* the **"slide-bar"** from disabled to enabled.
By default, the **Create for New Subscribers "slide-bar"** is *set* to enabled.



To update the dashboard name, *enter* a new name in the **Dashboard Name** field.
To update the **Number of Columns** that will display on the dashboard, *click* the **drop-down arrow** and *select* either **1**, **2**, or **3** columns. (It's recommended to default to two (2) columns).
To add additional widgets to your dashboard, *select* the **drop-down arrow** next to the **Module** field.

- **CRM – (6):** six widgets can be added to your dashboard
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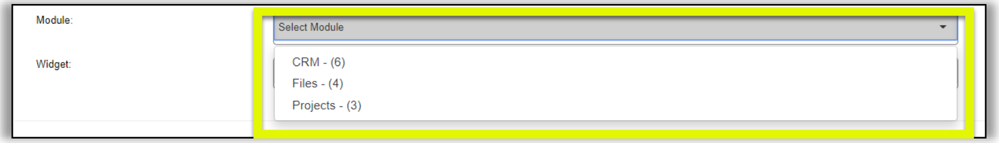
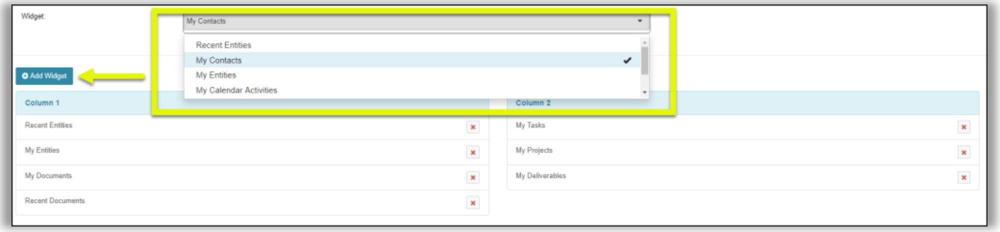


Next, *select* the **drop-down arrow** next to the **Widget** field. From the list, *select* a widget then *click* the **Add Widget** button to add that widget to your column (either Column 1, Column 2 or Column 3, depending on the number of columns you have selected).



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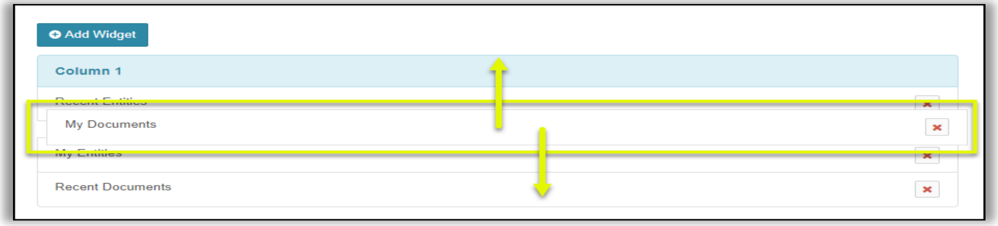
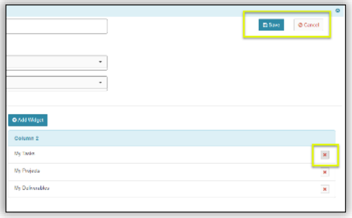


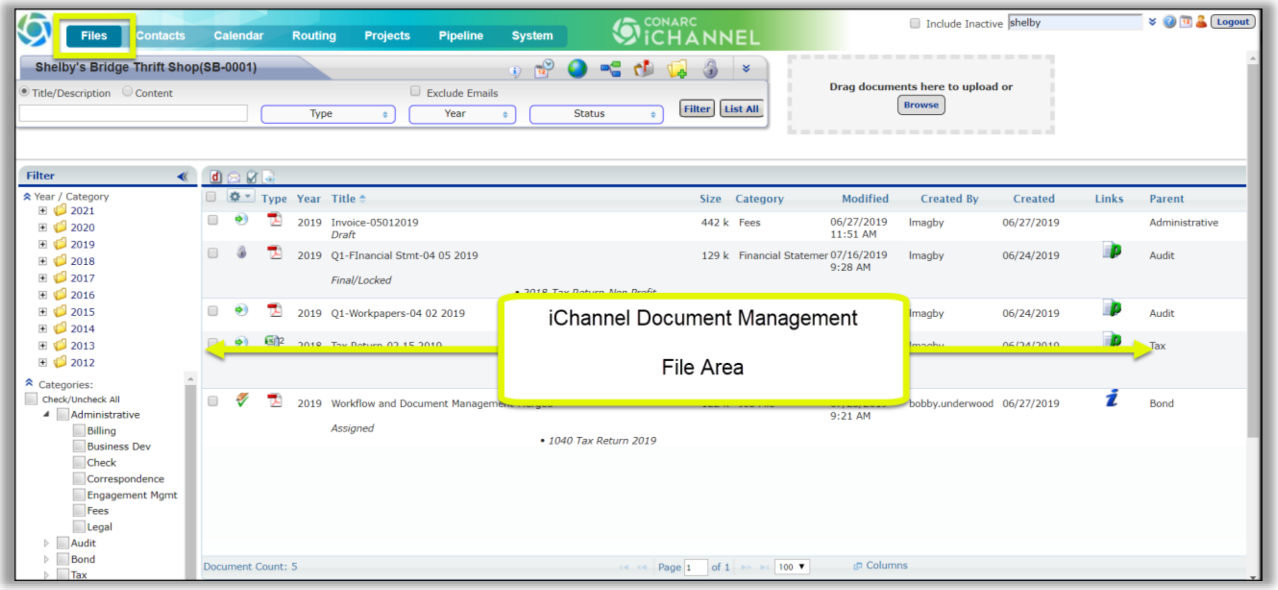
4 To remove a Widget from your Dashboard, *click* the "**red X**" icon next to the widget in the column.
To save your updates, *click* the **SAVE** button. To cancel your updates, *click* the **Cancel** button.



Module 3: iChannel Document Management

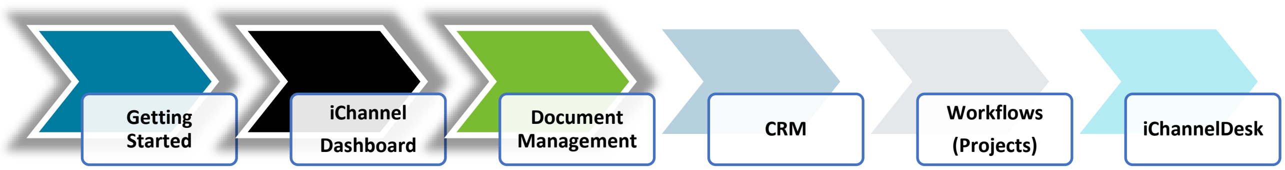
iChannel provides a single point of management from which users can view and access documents from anywhere at any time. iChannel provides the company with standardization, version controls and the ability to administer retention policy.

iChannel can handle an entire firm's content and specialized integration points to speed up data collection and standardize processes. Manager all your documents in their native file with flexible file sharing via email and secure access for multiple users. Take collaboration to a whole new level with indexing, versioning, online discussion and extensive search and sort features, as well as check-in and check-out of documents with history tracking.



Module Overview

The follow exercise will introduce the building blocks and tools of the **iChannel Document Management**.



In this module, **iChannel Document Management**, the following topics will be reviewed in detail:

Module 3: iChannel Document Management
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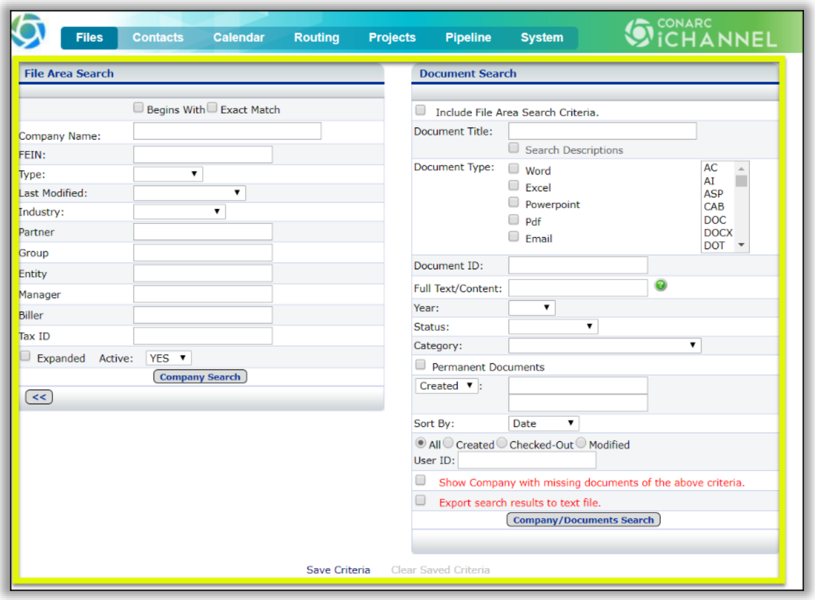
iCHANNEL

Document Management (File) Search – Global Search

From the **iChannel Dashboard Banner**, select the **Files** link to open the Document Management Area Search screen. The Document Management Area Search and Document Search features let you look for clients by defining client filter options and allows you to search for documents by defining document filter options. iChannel provides default search fields and includes a separate section, where an organization can define up to 15 unique filter options.

The Document Management Area Search screen also allows the combination of client filter options with the document filter options to help you narrow the search results. The **Save Criteria** feature will allow users the opportunity to save their filter settings for future use.

Overview: Document Management Area (File) Search – Global Search
Action
From the iChannel Dashboard Banner, *select* the **Files** link. The **File Area Search | Document Search** screen will display.



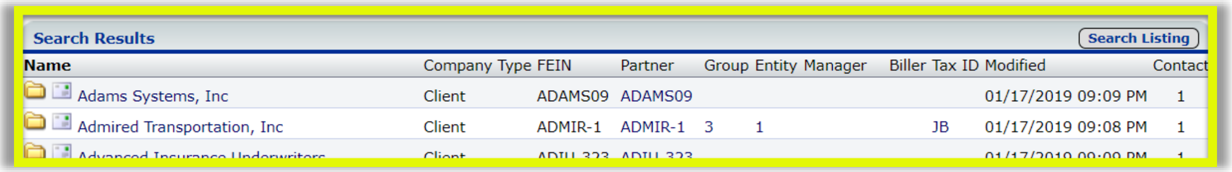
Document Management Area Search: Client | Site

- **Begins with** – select this option to search for a Client | Site where the search will look for the first few letters of the client | site name you define.
- **Exact Match** – select this option if you want to search for a Client | Site where there "must" be an exact match on any filter you define.
- **Filter Options** – enter any information you have about the client | site.
  - Entering a name or partial name will list any client | site which contains a portion of the text you entered.
  - The more filter options you define will narrow your search results allowing you to find the client | site quickly.

- **Expanded** – *select* the **Expanded checkbox** if you want to include the client address in the search results.
- **Active | Inactive drop-down** – *select* **Active** to only include active clients in the search results. *Select* **Inactive** to only include inactive clients in the search results.
- **Save | Clear Search Criteria** – *click* the **Save Criteria link** to save the data you have entered in any search field to use these filter options in the future. *Click* the **Clear Criteria link** to clear any saved search criteria.
    - This is useful when repeatedly searching for the same type of client or doing repetitive searches where only a few field values will change.

Click the **Company Search** button. If you choose to not enter any filter options, all clients that you have permission to view will be returned.

- From the **Search Results screen** you have additional options:
    - *Click* on the **Search Listing** to do a new search
    - *Click* on the **Site Name** to access client CRM screen
    - *Click* on the **Folder icon** to go to the clients Document Management Area
    - *Click* on the **Email icon** to go to the client's Email Area



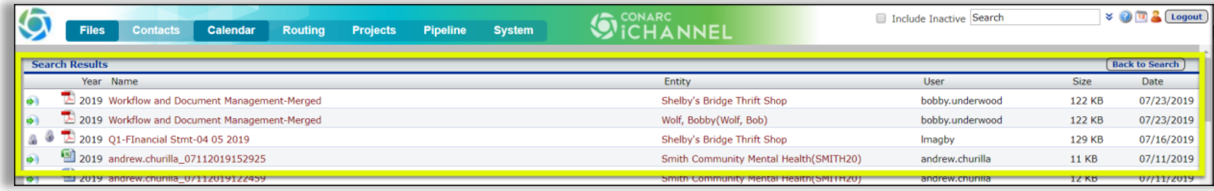
Document Search

- **Filter Options** – allows you to search documents across Sites enter any information you have about the document.
    - Entering a name or partial name will list any document which contains a portion of the text you entered.
    - The more filter options you define will narrow your search results allowing you to find your document quickly.
- **Document Title** – *enter* at least **three letters of the document name** you are wanting to search.
- **Document Type** – *place* a **check** in any **Document Type** options to limit your search by document type. *Hold down* the **ctrl key** and **using your mouse** to make multiple selections in the additional types field.
- **Document ID** – every document in iChannel is assigned an ID which is stored in the document properties.
- **Full Text | Content** – Enter text in this field triggers a "full text search" of all the documents in iChannel. *Select* the icon to open the **Text Search Help** window that provides search options and show examples on how to use the full text | content filter.
- **Year** – *select* the **Year drop-down arrow** to narrow your search by a particular year.
- **Status** – *select* the **Status drop-down arrow** to narrow your search by status.
- **Category** – *select* the **Category drop-down arrow** to narrow your search by **Topic | Subtopic** categories.
- **Created | Modified** – this field toggles between created and modified dates and has two calendar fields for a beginning and ending date.
- **Sort By** – *select* the **Sort By drop-down arrow** to narrow your search by **Date**, **File Name**, **Company**, **User** or **File Type**.

- **User ID** – provides options for searching by the User ID. The *default* is to search across all users. You can limit it by *selecting* **All**, **Created**, **Check-Out**, or **Modified**.
- **Show Sites with missing documents of the above criteria** – *check* this box will return any sites that **DO NOT** have the specified criteria defined above.
- **Export Search results to text file** – *check* this box will provide a **link on Search Results** screen that will display the results as a text file.

Click the **Company/Document Search** button. If you choose to not enter any filter options, all documents that you have permission to view will be returned.

- From the **Search Results screen** you can access the following:
  - *Click* on the **Document Name** to open the document
  - *Click* the **Document Operations icon** to open the document properties
  - *Click* on the **Site Name** to access client CRM screen

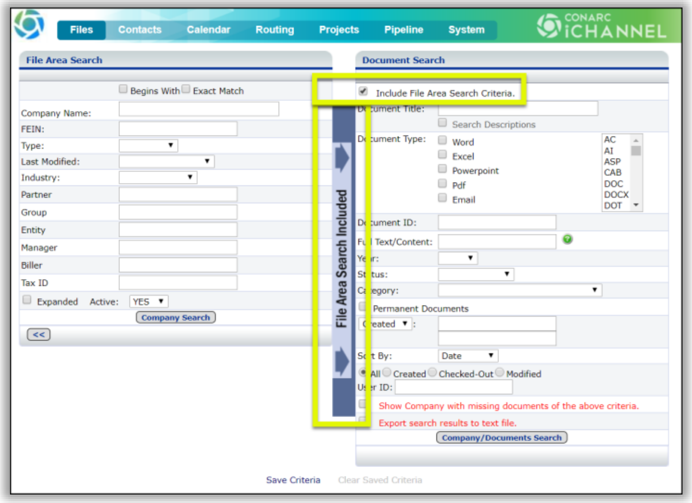


The File Area Search screen also allows the *combination* of using client **File Area Search options** in conjunction with **Document Search options** to help you narrow the search results.

Include File Area Search Criteria

On the Document Search section, *check* the **Include File Area Search Criteria** checkbox.

- The File Area Search Included indicator will display.



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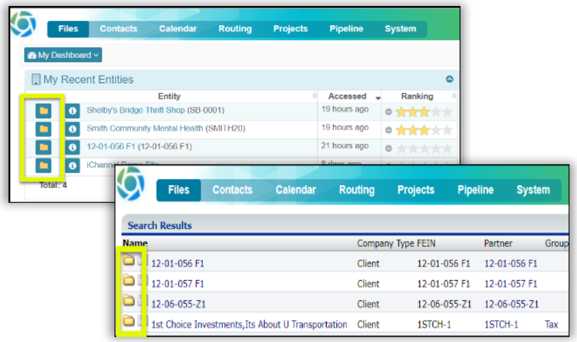
Document Management Area Overview

A **Central Document Repository** or **Document Management Area** houses all the documents that a user will access in iChannel. The Document Area displays all the data for each Client that is defined in iChannel and the Clients that you have permission to view.

To get to the Document Management Area you have a few options:

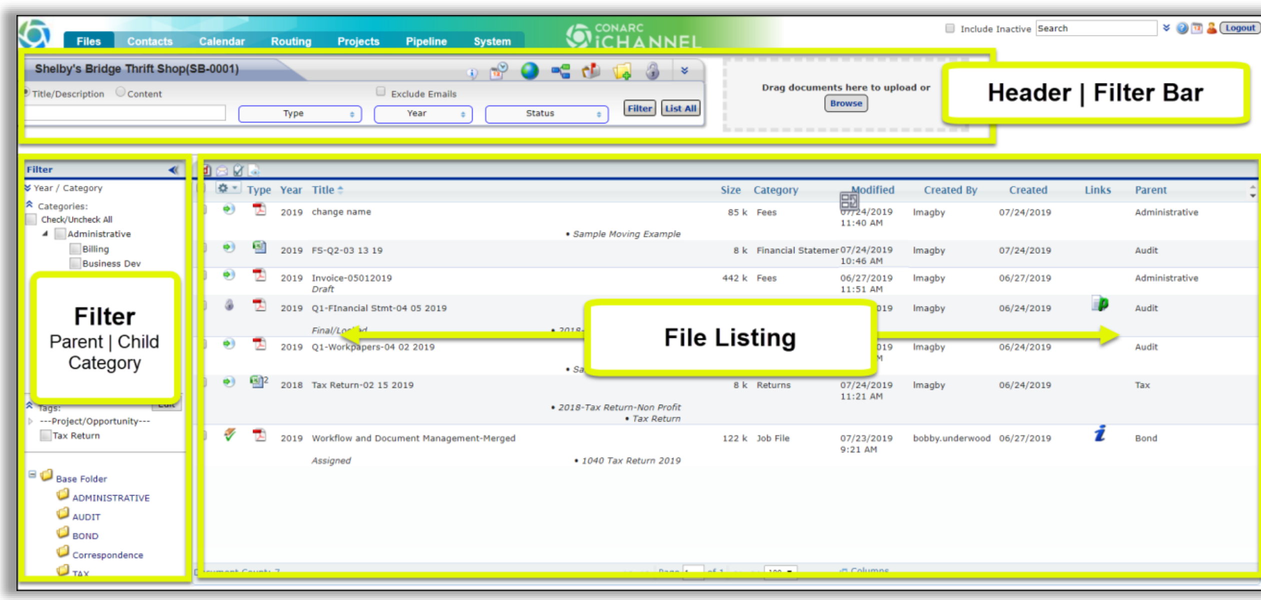
- From the **iChannel Dashboard**, locate a Client | Site in a widget and *click* the **File Folder icon**.
- From the **Quick Search** or **File Search** results screen, *click* on the **File Folder icon**.



Once you access the Document Management Area, the File Area is defined in **three (3) key areas**:

- Header | Filter Bar,
- Filter (Topic | Subtopic) Category
- File Listing.

Information displayed in each key area is controlled by your System IT Administrator and Security Group profile.

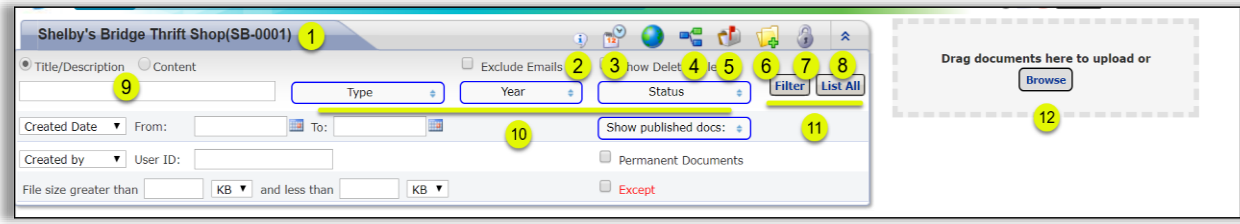


Document Management Area Overview – iChannel File Header | Filter Bar

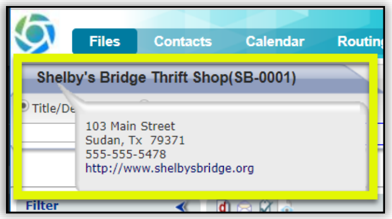
The **iChannel File Header | Filter Bar** provides the users with the ability to set-up unique filter options to quickly find document(s) associated with a Site. To search, enter as much or as little in any of the filter options then click Filter button to return your results in the File Listing section.

1. Many of the options to search within the Header | Filter Bar section are controlled by your System IT Administration and your Security Group.

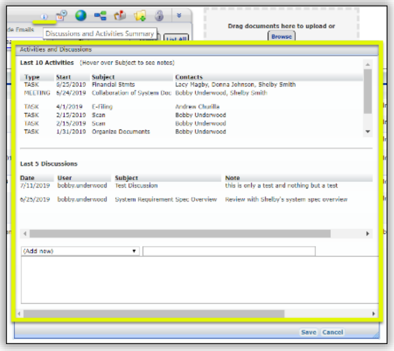
Overview: iChannel Header | Filter Bar
Action



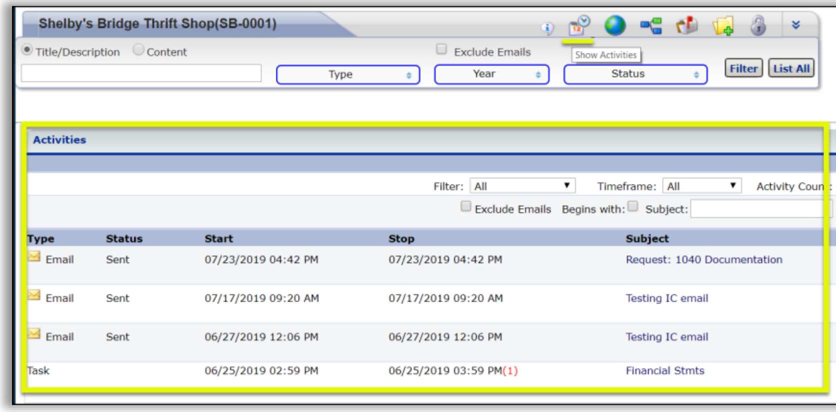
1. **Site Name** – displays the name of the Site accessed from any folder icon. *Hover* over the name to view the **Contact Information**. *Click* on the **Site Name** to go to the Site Detail (CRM) module.



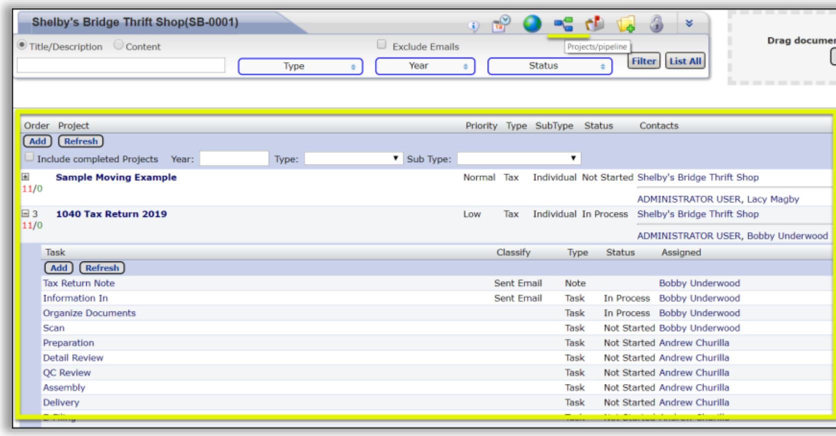
2. **Discussions and Activities Summary Icon** – *click* the **Information Icon** to load the Last 10 Activities and Last 5 Discussions for the Site Name.



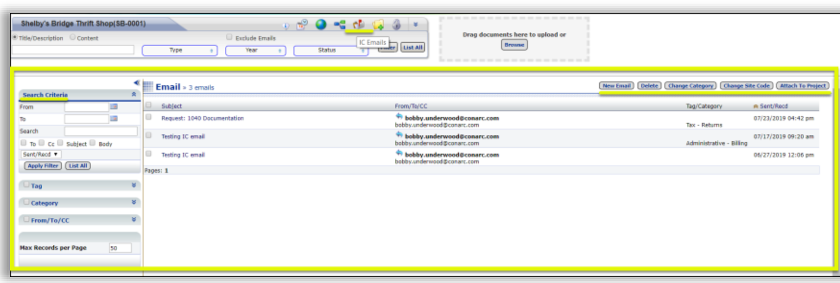
3. **Show Activities Icon** – *click* the **Calendar Icon** to load the Activities screen for activities associated with the Site.



4. **Workflow / Pipeline Icon** – *click* the **Workflow Icon** to view all workflow projects associated with the Site. *Click* the **plus icon** to expand the Tasks or click the Workflow name to launch the workflow details screen in a new window.

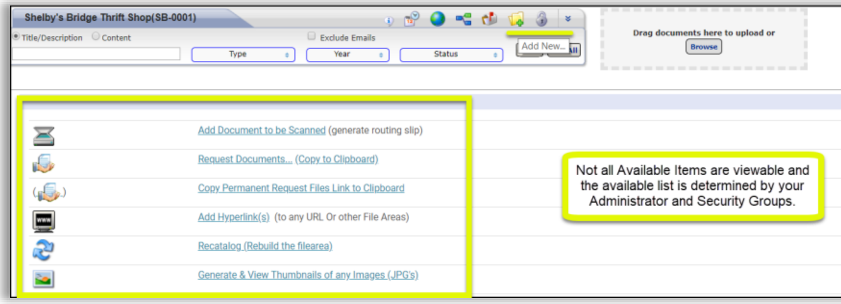


5. **IC Email Icon** – *click* the **Mailbox Icon** to open the Email screen. Emails that have been forward will appear in the email section. From this screen, you can: Search Emails, Create, Delete Emails, Change Category, Change Site Code, Attach to a Workflow for emails.

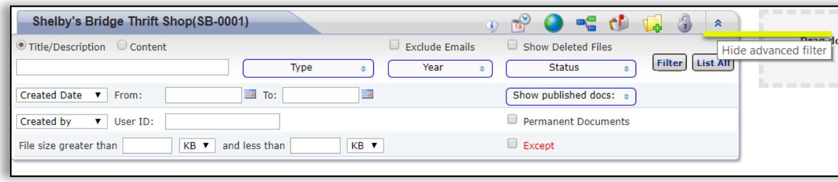


6. **Add New Icon** – *click* the **Folder Icon** to access an additional option to add new documents into iChannel. From this screen you can:
   - Add Document to be Scanned (generate routing slip)
   - Request Documents (Copy to Clipboard)
   - Copy Permanent Request Files Link to Clipboard
   - Add Hyperlink(s) (to any URL or other File Area)
   - Recatalog (Rebuild the file area)

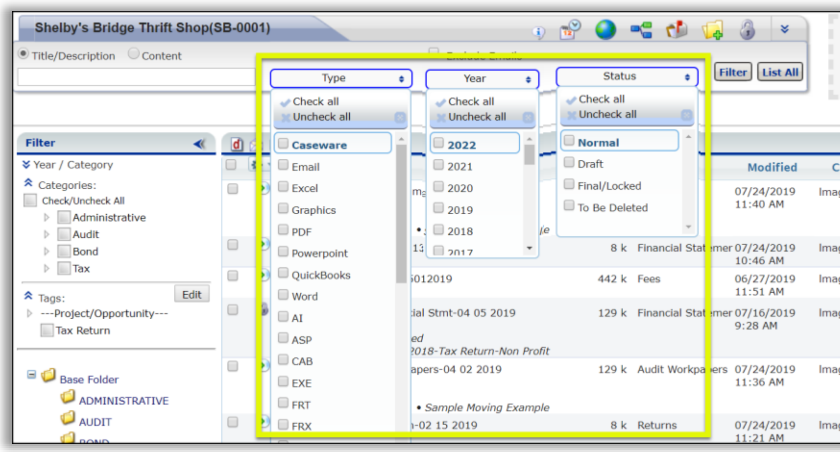
- Generate & View Thumbnails of any Images (JPG's)



7. **Pad Lock Icon:** Site Permission – The **Lock Icon** is controlled by your System IT Administrator and Security Group and is typically for iChannel Administrator. *Click* the **lock icon** to customize the security settings for this Site.
8. **"Double-down"- "Double-Up" Arrows** – *click* the **Double-down Arrows** to **Show Advance Search Filter** options. *Click* the **Double-Up Arrows** to **Hide Advance Search Filter** options.



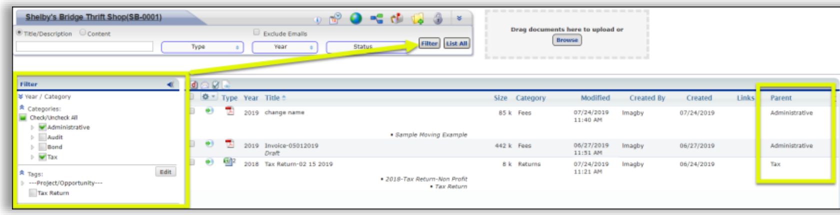
9. **Title/Description/Content field – Type drop-down** – to easily search for a document by either Title/Description or Content. *Enter* at least a **MIN of 3 characters** to start the search. *Click* "**Enter**" or *click* the Filter button to return your results.
10. **Type | Year | Status Search filters** – *click* the **Type drop-down arrow** to select or multi-select the type of document you want to include in your search. *Click* the **Year drop-down arrow** to select or multi-select a year to include in your search. *Click* the **Status Search drop-down arrow** to select or multi-select the status to include in your search.

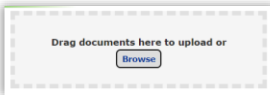


11. Filter List All - *click* the **Filter** button to search for document(s) based solely on your defined search options. *Click* the **List All** button to search for "all" documents associated with the Entity and not based on any search option(s) defined.

a. The **Filter** button can also be used to streamline your search results in conjunction with **Filter Topic | Subtopic Category** section.

i. Place a *check* in a **Categories** or **Tag** checkbox, next *click* the **Filter** button. The File Listing area will only return results for documents that match your criteria.



12. 

- to quickly add a Document to the File Listing area, *click* the **Browse** button to add a document from your computer. In addition, you can quickly *drag-and-drop* a document by dragging into the document area.

- *Click* the **Browse** button or Drag-and-drop a document into the gray box area. The **Choose a File to Upload** window opens.
- *Navigate* and/or *Select* the file from your file management area.
- *Click* **Open**. The **Add Document(s)** window will open.
- In the **Change Properties** area, update the following areas as necessary:
  - *Update* the **Title**, if necessary.
  - Change Properties: *select* the **properties (Parent | Child Category)** to apply to the document.
    - All documents are required to be assigned to a Topic | Subtopic Category
  - **Target Subfolder**:
    - If the subfolder of the document being added needs to be updated, *select* the **Target Subfolder drop-down**.

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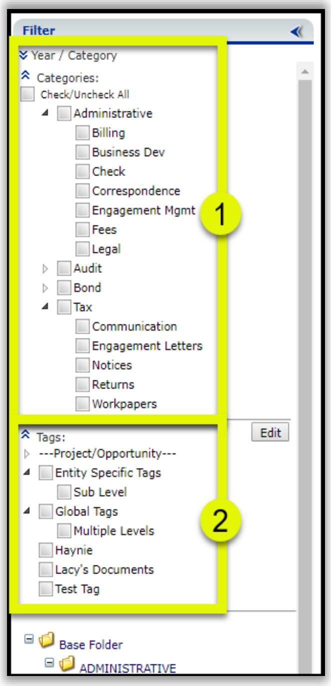
iChannel Document Management Area Overview – iChannel Filter Topic | Subtopic Category

The **iChannel Filter for Topic | Subtopic Categories** allows for every document that is always housed within iChannel be associated with at least *one (1) Topic category* and at least *one (1) Subtopic category*. Having each document that is housed in iChannel associated with a topic | subtopic category allows for every document to easily be searched and/or filtered, shared or retrieved in the File Listing section. Additionally, you can filter specific documents by Categories to share quickly with internal associates or external clients. The Category feature also provides additional security around your documents not only in iChannel but with the iChannel Portal.

Overview: iChannel Filter Topic | Subtopic Category
Action



1. **Filter: Categories** – there are no limits to the number of Topic | Subtopic Categories. Yet, all Topic Categories must have at least one (1) Subtopic category. The Category structure is defined and maintained for consistency with the use of a "template". Your Administrator and iChannel Support | Implementation team will work together to ensure your structure adheres to your organization needs for document management.
   - Examples of Topic Category Filters are listed below but not limited to:
     - Administrative, Audit, Data Analysis, Engagement, Litigation, Tax
   - Examples of Subtopic Category Filters are listed below but not limited to:
     - Billing, Business Development, Correspondence, Engagement Letter, Legal, Notices, Returns, Workpapers

2. **Filter: Tags** – tags are custom for each Site's Document Management Area and can be arranged in a multi-level tier. The *top level* is called the **Topic Documents Tag** and the *lower level* is called the **Subtopic Document Tag**. Tags provide the user an optional identifier to assign to a document beyond the Topic| Subtopic Category.
   - Tags can also be used in your iChannel File Header | Filter Bar search options to assist with quickly finding document(s) for a Site.

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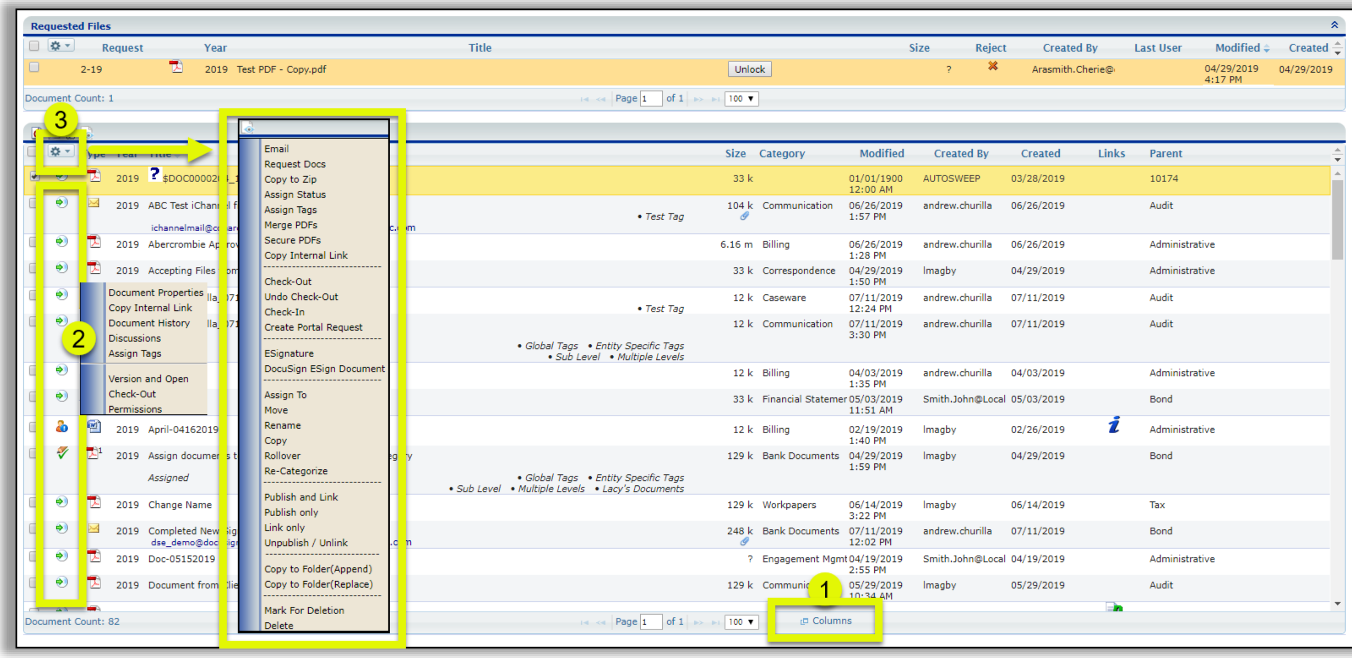
iChannel Document Management Area Overview – File Listing

The **iChannel File Listing** provides the user with all documents that are associated with the Entity. User's will spend a great deal of their time working in the document area as the File Listing area provides many features to performs actions on documents. Additionally, the iChannel File Listing area also provides a Requested Files area for users to view, accept, reject and/or email documents that have been submitted by your Clients.

To assist with easily viewing and finding your documents, the iChannel File Listing area can be *customized* to **display columns** and to **sort your columns A-Z or Z-A** by column heading.

- Many of the options to search within the Header | Filter Bar section are controlled by your System Administration and your Security Group profile.



In the **File Listing** window, three learning exercises will be covered:

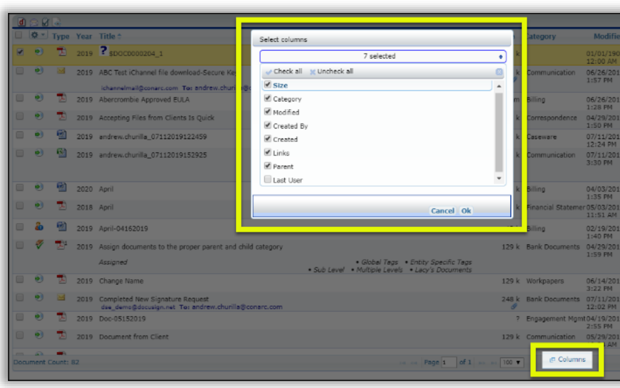
1. File Listing Column feature
2. Document Feature(s) – Action icon
3. Multiple Document Feature(s) – Gear Icon

iChannel Document management Area Overview: Column Feature

Overview: iChannel File Listing Column Feature

Action

1. **Columns** – in the File Listing area, *locate* and *click* the **Column** icon. The **Select columns** window will display. *Click* the **"arrow"** in the **Select title bar** to display all column options. Place a *check* next to the column(s) to **add** to your File Listing view or *uncheck* a column to **remove** a column from your File Listing area.



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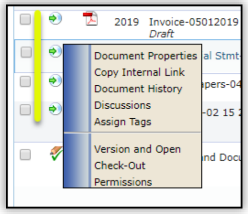
iChannel Document Management Area Overview: Action Icons

Overview: Action Icon

Action



Document Feature(s) – Action Icon – iChannel provides several features to view additional information about a document that is in the iChannel File Listing area. *Click* the **Action** **icon** provides the following options per document:

- Document Properties
- Copy Internal Link
- Document History
- Discussions
- Assign Tags
- Version and Open
- Check-Out
- Permissions

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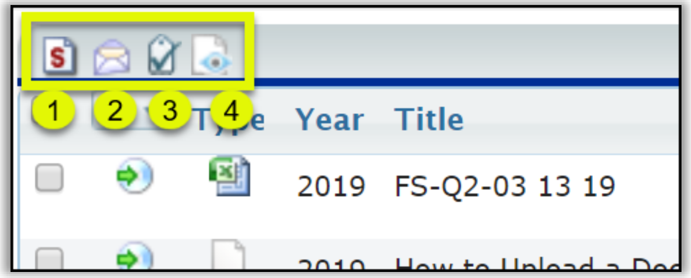
iChannel Document Management Area Overview: File Listing – Icons

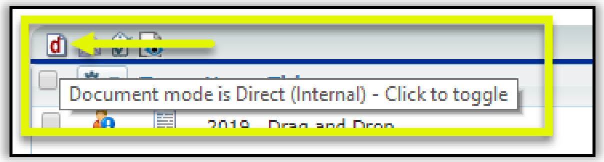


1. File Listing Icon: Direct Editing | Stream Mode Editing | Off-line Editing

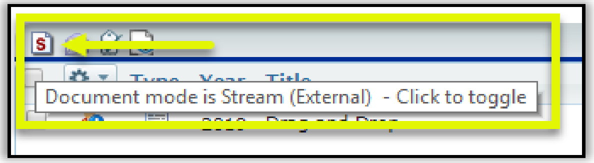
iChannel supports two (2) modes when editing documents.

- **Direct Mode** – indicates that the user is accessing the documents directly attached to iChannel or via Citrix, Terminal Server, or VPN.
- **Stream Mode** – indicates that the user is accessing the document(s) remotely, via the web.

The mode you are working in determines how you edit document(s) in iChannel. You can change the mode in iChannel by clicking the below icons. These icons perform as toggle switches to move between direct and stream modes. The ability to toggle is controlled by your System IT Administrator | Security Group profile



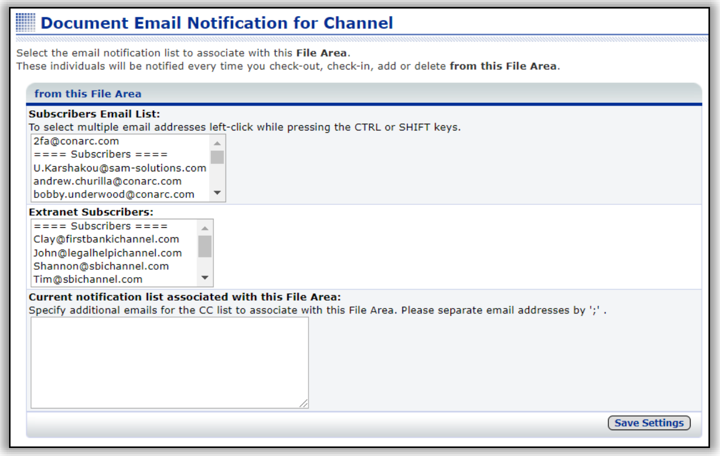
Document mode is **Direct (Internal)**



Document mode is **Stream (External)**

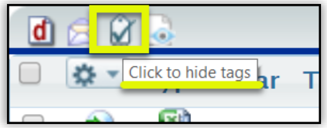
2. File Listing Icon: Document Email Notification for iChannel

Click **Email Notification** icon to list Subscribers | Portal Subscribers associated with the File Area. Individuals listed from the Subscribers Email List, Portal Subscribers will be notified every time you check-out, check-in, and/or delete from this File Area.



3. File Listing Icon: Hide Tags

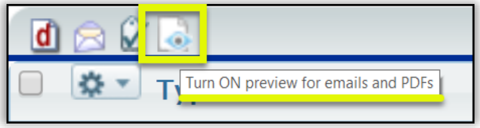
Click **Hide Tags** if you do not want to see any assigned tags in the File Listing area by documents. This icon performs as toggle switches to either **Hide** or **Show** Tags in the File Listing area.



4. File Listing Icon: Turn ON preview for Emails and PDFs

Click **Turn ON preview for Emails and PDFs** icon enable the preview options for Emails and PDFs.

This icon performs as a toggle switches to either **Turn On preview for emails and PDFs or to Turn Off preview for emails and PDFs.**



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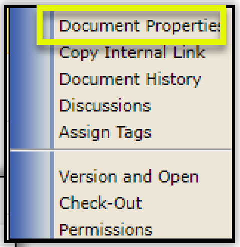
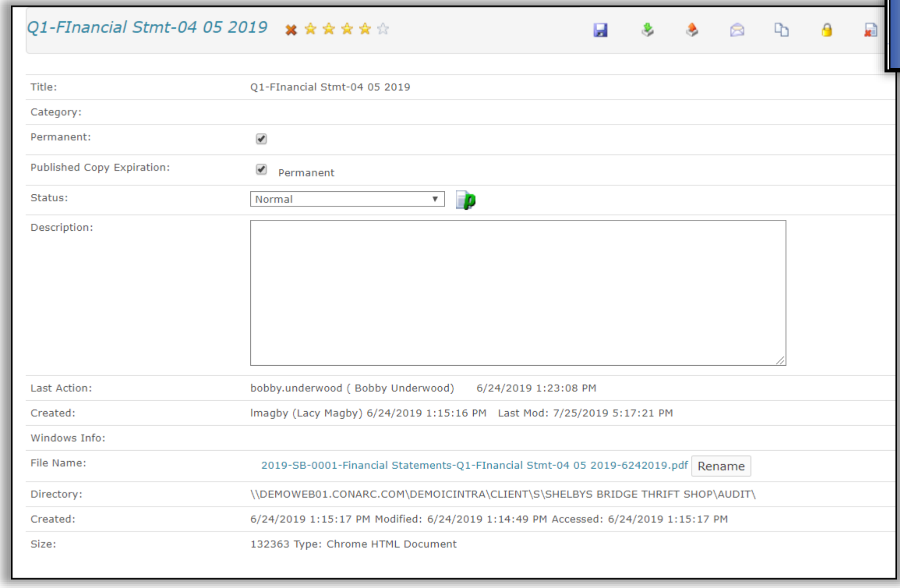
Document Feature: Document Properties

Action Icon – Document Properties	
Step	**Action**

Hover over the **Action** **icon,** the action list will display. *Click* **Document Properties.**



The **Document Properties** window will display.



Depending on your Security Group permissions, a few available actions are:

- **Star Rating** – you can assign a "**star rating 1-5**". If you assign a star rating, the document will now appear on your Dashboard under My Documents.
- **Status** – *click* the **drop-down arrow** to change the status of the document.
- **Description (optional)** – *enter* **Description** notes.
- **Last Action** – time stamp and user that made any document change(s).
- **Created** – the user that created the document (created date) and the Last Modify date.
- **File Name** – the current name of the document is listed. *Click* **Rename** button to update the document name.
- **Directory** – identifies where the document is listed in the client file folder.

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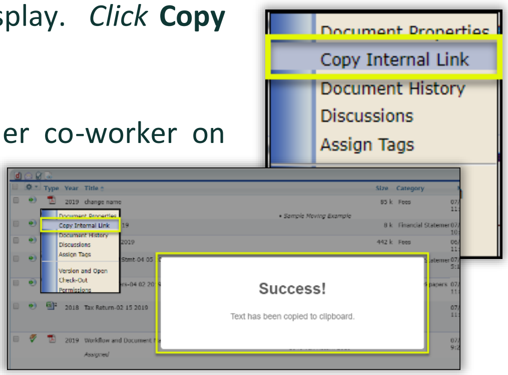
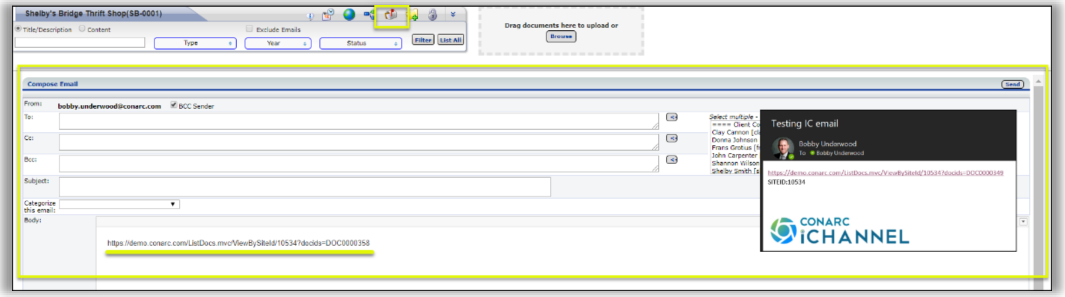
Document Feature: Copy Internal Link

Action Icon – Copy Internal Link	
Step	**Action**
	Hover over the **Action** icon, the action list will display. *Click* **Copy Internal Link.** There are times you need to collaborate with another co-worker on document(s) and where that co-worker doesn't have access to your File Listing to view the document(s). Use the Copy Internal Link to copy the document to your clipboard and send the link via.



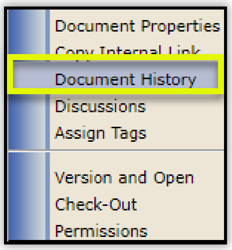
- Once the Internal Link has been copied to your clipboard, users can:
  - *Click* the **iChannel Email link** to send the link to an internal contact using iChannel. When the internal contact receives the email and clicks the link, the user will be taken to the File Area, and only the document(s) that user has shared via the Internal Click will be available.

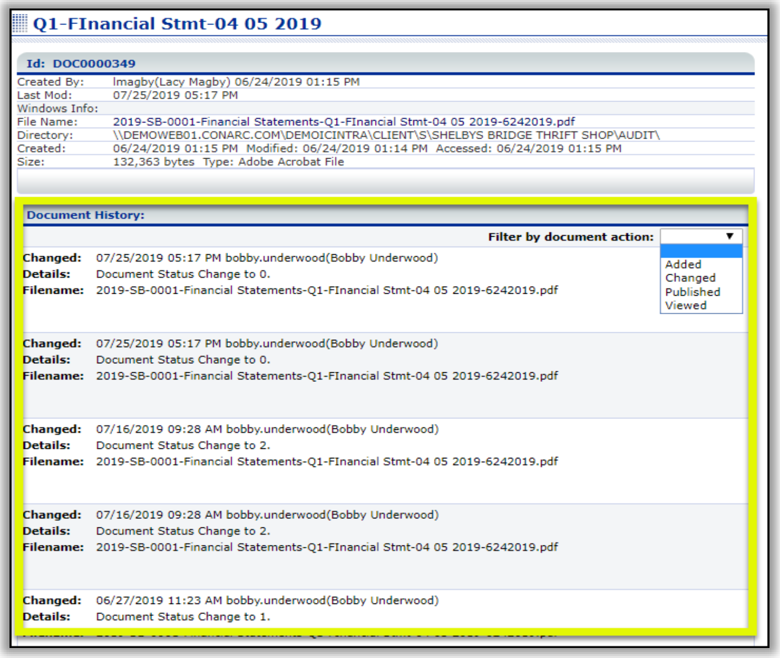


  - *Paste* the **Copy Internal Link** in a New Email via your company Email system and send the link to the internal contact.

Document Feature: Document History

Action Icon – Document History	
Step	**Action**
	Hover over the **Action** icon, the action list will display. *Click* **Document History.** iChannel logs "all" actions (history) for every document in the Document History summary.





The history logs follow all actions for each document and always includes the **Date | Time** and **User ID**:

- **Viewed** – both intranet and portal access.
- **Check-Out | Check-In** - the user that checked-out | checked-in the document and the date | time.
- **Versioned** – if version control is active, included the version number and any comments
- **Emailed** – includes list of attachments, recipients, & password of .zip file, if a password was set on the .zip file.
- **Emailed as Link** – includes list of attachments, recipients, expiration date, number of downloads allowed, number of downloads used, and secure key.
- **Published** – includes the site code and channel | topic published to the iChannel Portal.
- **Unpublished**
- **Category | Year Changed** – includes any previous values associated with the document.
- **Status Change** – includes the previous document status and any changes to the document status by a user.
- **PDF Merge** – any .pdf documents where a user has merged the, will be listed in the history to show what and when documents were merged.

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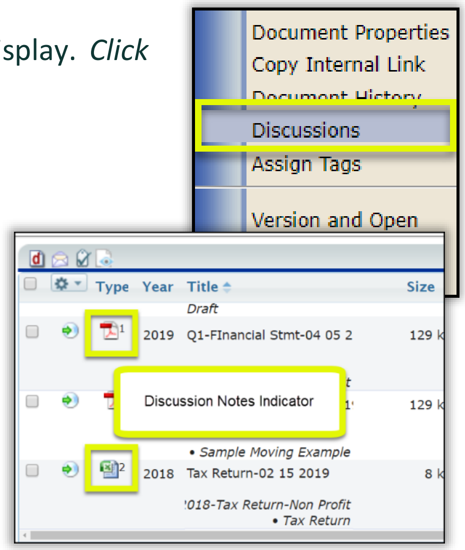
Document Feature: Discussions

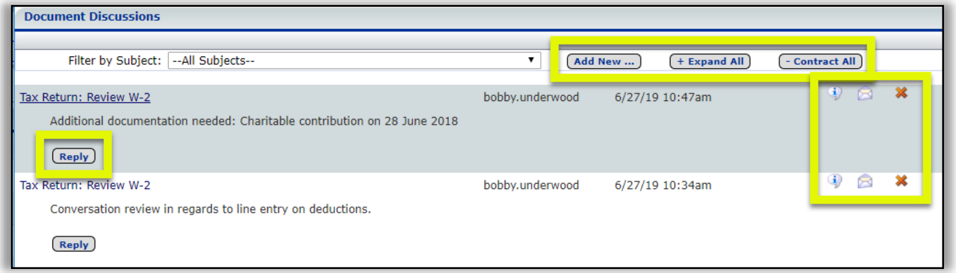
Action Icon – Discussions	
Step	**Action**
	Ability to collaboration with clients and co-workers with regards to documents is one of the most time-saving features. **Discussion Notes** create a blog like discussion for documents that can be posted or emailed.

1. *Hover* over the **Action** icon**,** the action list will display. *Click* **Discussions.**



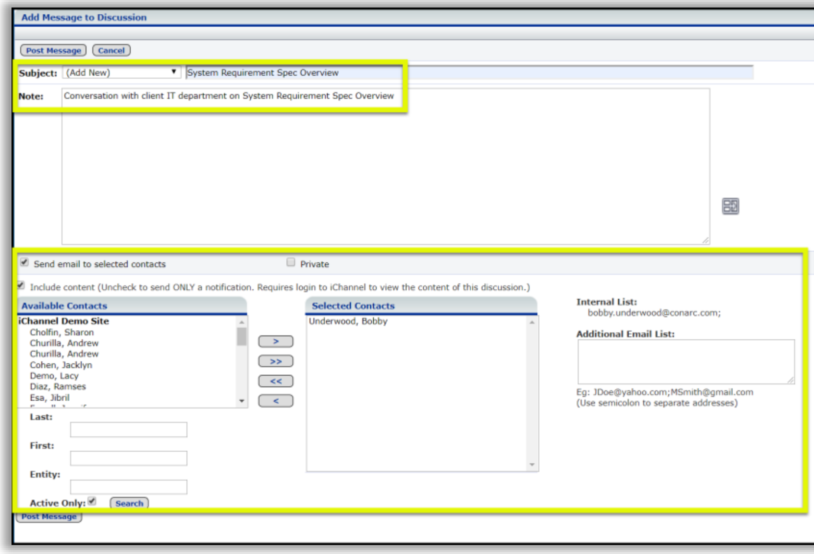
- Documents with Discussion Notes have a **number to the right** of the File's Icon to denote the number of conversations posted.

2. The **Document Discussion & Notes** window opens. From here you can also open the document for viewing.
   a. If notes have not been posted, *select* Add New ... button.
   b. If there are *existing notes*, additional notes can be added. Additional you can add a new note, delete a note, filter notes, or print the discussion list.
      i. It is **not recommended to delete notes** as they can be searched as part of the Document History.



3. *Click* Add New ... or *select* a **Subject** from the *drop-down list*, if available. This list is specific to each document.
4. In the **Subject** field, *enter* a descriptive name.
5. In the **Notes** field, *enter* the discussion notes.
6. *Select* the **Send email to selected contacts** checkbox to open the email options section.
7. *Select* the **Private** checkbox to mark this discussion as private.

8. Next, *click* **Post Message**.



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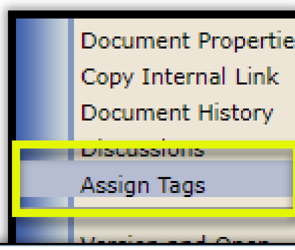
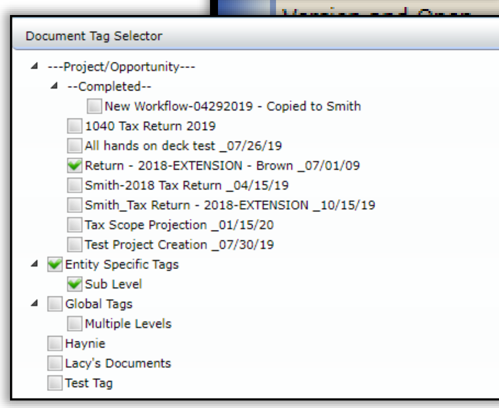
Document Feature: Assign Tags

Action Icon – Assign Tags	
Step	**Action**
	Selecting **Assign Tags** displays the tags that can be associated with a document in iChannel and allows users to add | remove tags. The **Tag Editor** will also allow you to create new tags.

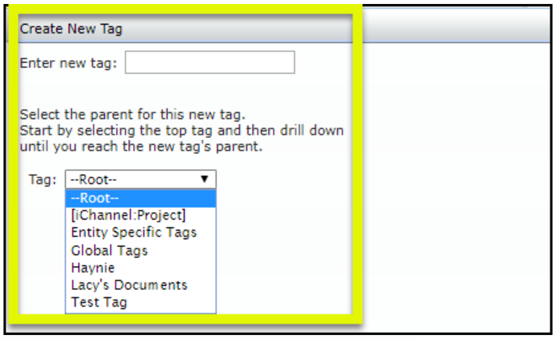
1. *Hover* over the **Action** icon, the action list will display. *Click* **Assign Tags.**

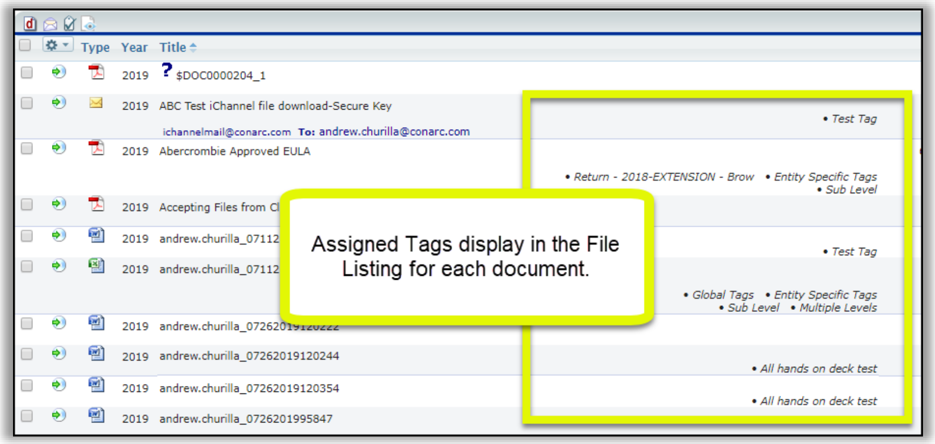


2. The **Document Tag Selector** window box opens.
3. To assign a tag, *select* **Tag** checkbox.
4. To remove a tag, *deselect* **Tag** checkbox.



5. To create a new tag, *click* **New Tag** button. The **Create New Tag** window opens.
6. In the **Enter new tag** field, *enter* a descriptive tag name.
7. In the **Select the parent for this new tag. Start by selecting the top tag and the drill down until you reach the new tag's parent**. In the **Tag drop-down list**, *select* a **Tag**.
8. *Click* **Save**.





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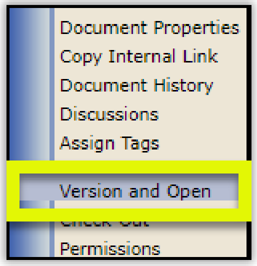
Document Feature: Version and Open

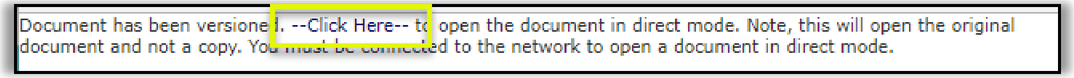
Action Icon – Version and Open

Step	Action
	Versioning is the process in iChannel that allows for making a back-up-copy of the document before users begin to make any changes to the document. When a user creates a version, the current document is copied and placed in the document history as a hyperlink with the version "#".

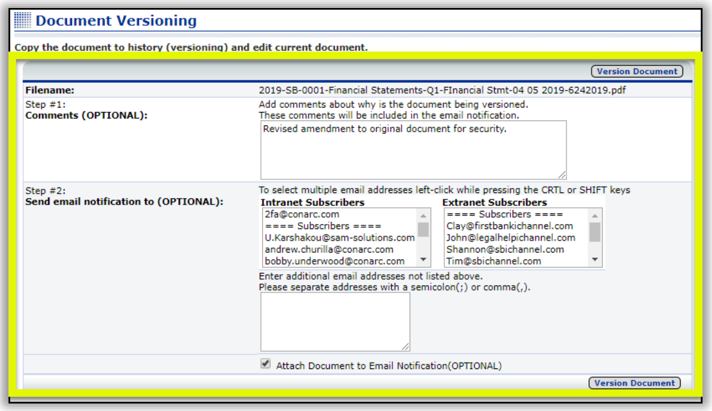
Hover over the **Action** icon, the action list will display. *Click* **Version and Open.**



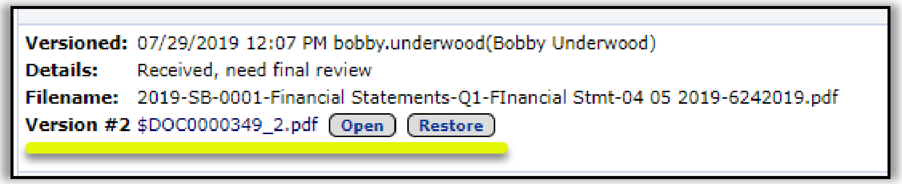
1. The **Document Versioning** window box opens.
2. To version a document, click the **Version Document** button. The following message will display. Next, *click* the **Click Here link** to open the document. Make any necessary changes to the document at this time.



3. Additionally, to create a version of a document, following these steps:
    a. In the **Step #1: Comments (OPTIONAL):** field, *enter* **comments**. Comments entered are saved to the Document History and are included if you send an email notification. While comments are optional, it can be helpful for other users.
    b. In the **Step #2: Send email notification to (OPTIONAL):** field, *select* email address(es).
    c. *Select* **Attach Document to Email Notification (OPTIONAL)** to notify the document is being versioned.
    d. *Click* **Version Document** button.



4. To *view* the **Prior Version** of the document, *access* the **Document History**.



NOTE: To access a prior version(s), *Hover* over the **Action** icon, the action list will display. *Click* **Document History.**

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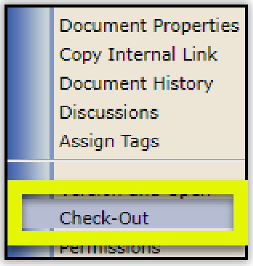
Document Feature: Off-Line Editing

There are circumstances where you might need to access or edit document(s) when you are not in the office or connected to your network. The **Check Out – Check In** feature manages that process.

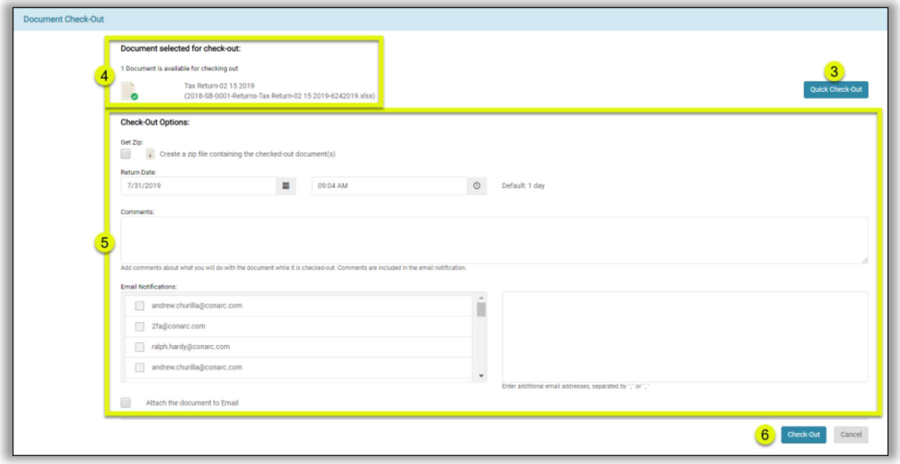
Document Feature: Check-Out

Action Icon – Check-Out	
Step	**Action**
	Checking out a document is a vital function when working in today's mobile workforce. Documents are checked-out and a copy of that document is saved locally (or where the users determines best to save the document). When a document is **checked-out**, the document in iChannel is set to **read-only**. There are comment fields in each step of the check-out process which will be helpful for other users who also have access to the same document.

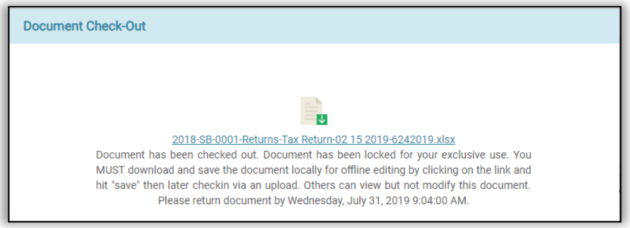
Hover over the **Action** icon, the action list will display. *Click* **Check-Out.**



The **Document Check-Out** window box opens.



3. *Click* Quick Check-Out to check-out the document without defined any Check-Out Options.



4. In the **Document selected for check-out** section, the document(s) to be checked-out will display.
5. In the **Check-out Options** section:
   a. (Optional) *Check* the **Get Zip** checkbox if you want to *Create a zip file containing the checked-put document(s).*

b. (Optional) Check Out Information, *enter* a **Return Date**, *enter* a **Return Time**. These field define when the expectation for the document to be check-in.
c. (Optional) *Enter* **Comments** about what you will do with the document while it is checked-out. Comments are included in the email notification and will be saved in the document history.
d. (Optional) **Email Notification**, select from list an email to send an email notification to additional internal or external users.
e. (Optional) *Check* the **Attach the document to Email** checkbox if you would like to attach the document(s) to the email.

6. *Click* Check-Out to check-out the document(s). The icon will update to to indicate the document(s) have been checked-out.

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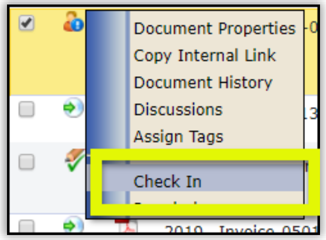
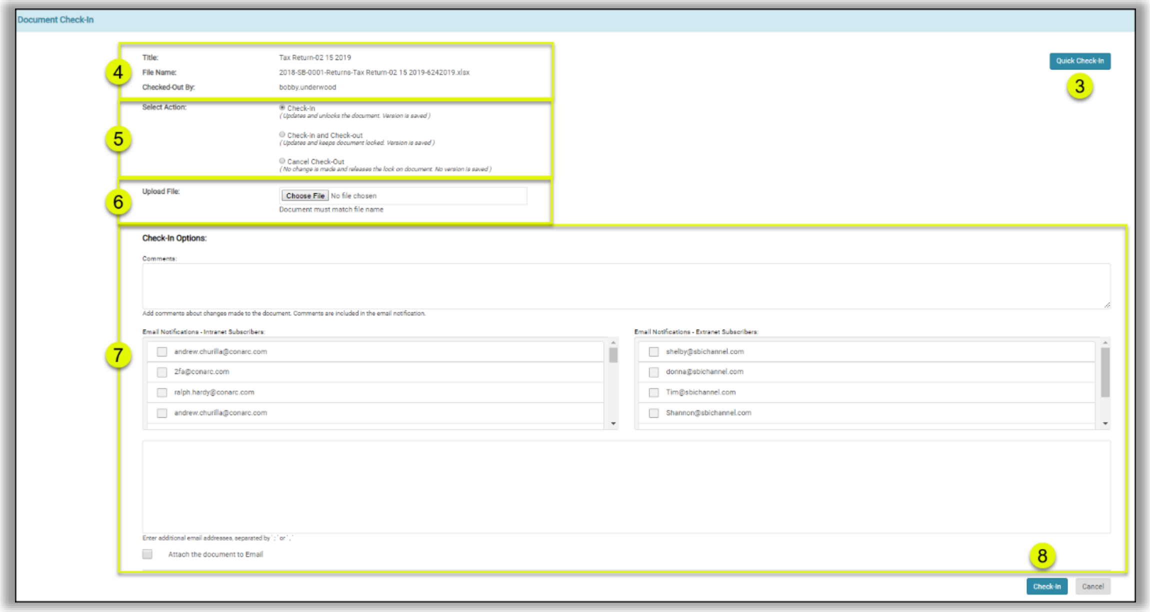
Document Feature: Check-In

Action Icon – Check-Out	
Step	**Action**
	When a user has finished making changes and or updates to the Checked-Out document(s), users will want to Check-In the document in iChannel.
	Hover over the **Action** icon, the action list will display. *Click* **Check-In**. The **Document Check-In** window box opens.





3. *Click* Quick Check-In to check-in the document without defining any Check-In Options.
4. The **Title**, **File Name** and **Checked-Out By** are pre-populated with information about the Checked-Out document.
5. In the **Section Action**, *select* one of the following:
    a. **Check-In** – Updates and unlocks the document. Version is saved and Document History is updated.
    b. **Check-In and Check-out** – Updates and keeps the document locked. Version is saved and Document History is updated.
    c. **Cancel Check-out** – No change is made and releases the lock on the document. No version is saved.
6. **Upload File** - *click* the Choose File to locate the document. *The Document **must** match the checked-out file name.*
7. In the **Check-In Options** section:
    a. (Optional) *Enter* **Comments** about what you will do with the document while it is checked-out. Comments are included in the email notification and will be saved in the document history.
    b. (Optional) **Email Notification**, select from list an email to send an email notification to additional internal or external users.
    c. (Optional) *Check* the **Attach the document to Email** checkbox if you would like to attach the document(s) to the email.
8. *Click* Check-In to check-in the document(s). The icon will update to to indicate the document(s) have been checked in.

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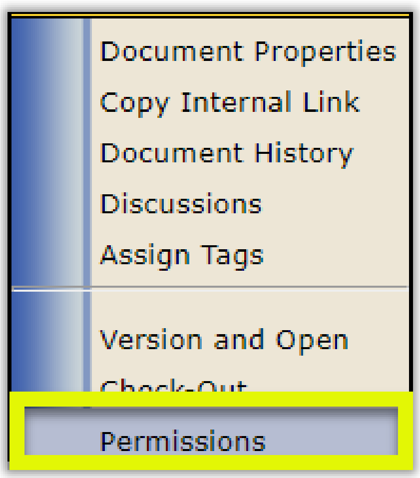
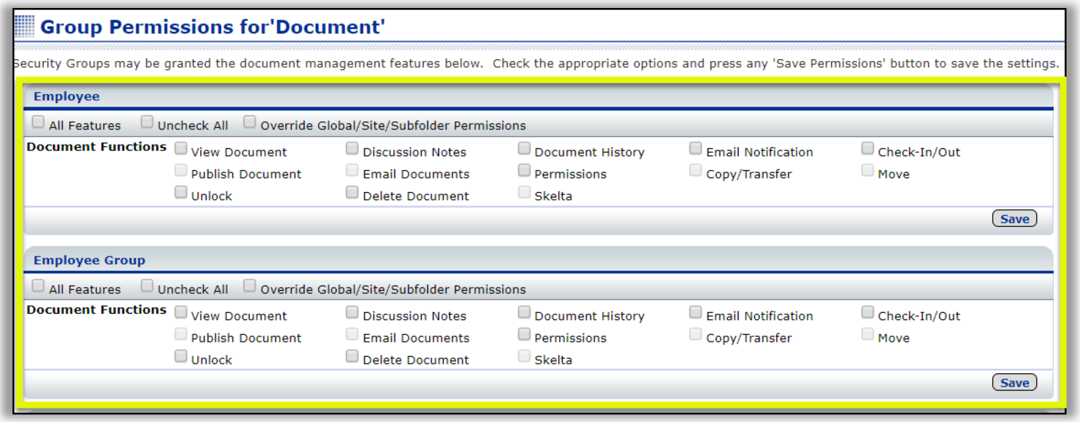
Document Feature: Permissions

Action Icon – Permissions	
Step	**Action**
	All document(s) held in iChannel are controlled by **Group Permissions**. A list of Security Permissions by Group and Features: • All features • View Document • Discussion Notes • Document History • Email Notification • Check-In/Out • Publish Document • Email Documents • Permissions • Copy/Transfer • Move



- Unlock
- Delete Document



Your organization will determine your Security Permission by Group and Features. Therefore, certain Group Permissions for Document(s) might not be within your access or viewable.

If you feel you should have access to any feature, please contact your System IT Administrator.

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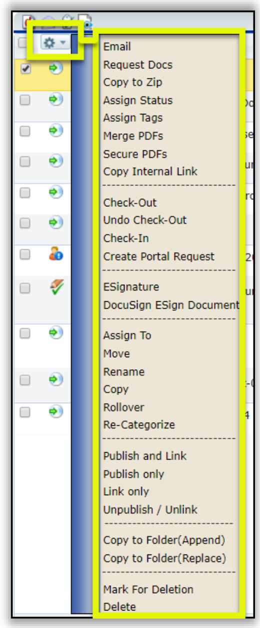
iChannel Document Management Features

The **iChannel Document Management Feature (Gear Icon)** provides the user the ability to perform a series of features on a document, or even perform a series of multiple features to documents at once.



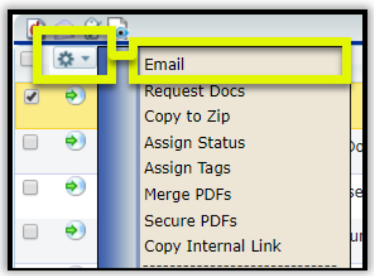
Your organization will determine what Document Management Features (Gear Icon) functions you have permission rights to perform on a document.

If you feel you should have access rights to perform any of these functions, please contact your System IT Administrator.

Document Feature: Email

Gear Icon – Email

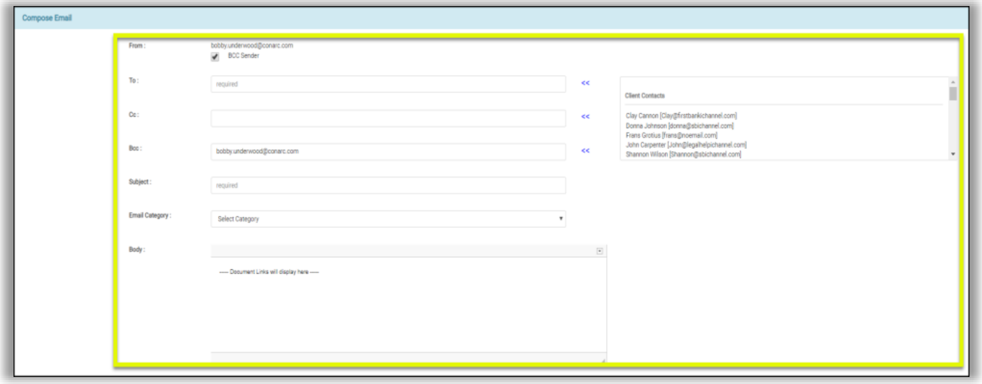
Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Email.**



The **Compose Email** window will display.

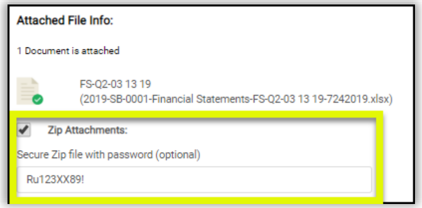
Depending on your **Security Group** permissions, a few available actions are:

- **From:** - *by default*, the sender's email address will be displayed. The **BCC Sender** checkbox *will be checked by default*. If you do not want to receive a copy of the email in your company Email Inbox, *deselect this option*.
- **To | Cc | Bcc:** – from the **Client Contacts** section, *select* **contacts** to send the document to by highlighting a contact, then *click* the " << " next to the appropriate field.
  - If a contact does not appear in the Client Contact list, you can *manually enter* an email address in any of the fields.
- **Subject (Required)** – *enter* a **description** for the subject of the email.
- **Email Category (Optional)** – in the **Select Category drop-down list**, *select* a **Topic | Subtopic category** to tag the email. This will place a copy of the email in the File Listing.
- **Body** – *enter* any additional email text you want to send with your email.
  - If sending documents as a secure link, **do not remove** the **"---Document Links will display here---"**

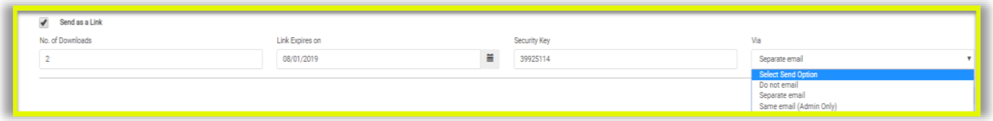


Attached File Info: - there are two (2) options when attaching and sending an email:

- **Zip Attachments:** - if checked, the document will be .ZIP when attached to the email.
    - **(Optional)** – you can secure the .ZIP file, **enter** a password in the **Secure Zip file with password (optional)** field.



- **Send as a Link** – if checked, the document will be sent as a link. Additional security options that you can apply:
    - **No. of Downloads** – the *default* number is **2**. If you want to allow more or less downloads, update the field.
    - **Link Expires on** – *click* the **calendar icon** to change the date when the link will expire.
    - **Security Key** – iChannel will default a Security Key, if you want to set your own Security Key, enter a new password in the field.
    - **Via** – there are three options when sending the Security Key to your email contact:
        - **Do not email**
        - **Separate email**
        - **Same email (Admin Only)**



- **Click** Send , the **Email Send Status** will display.

Depending on the options defined in the Attached File Info: field, the recipient will receive either one or two emails.

1. How to open the secure document email. *Click* the Document Link in the email.


Note: Each document can only be downloaded **2** times until **8/1/2019 12:00:00 AM.**

To open secure documents:
- Click on the link below
- Enter your email address
- Enter the secure key **Your secure key has been sent in a separate email**

Next you should be given the option(s) to Open, Download, or Save, but this varies by web browser. Note: your file may get placed in your browser's download folder automatically.
FS-Q2-03 13 19

CONARC iCHANNEL

2. If you selected to send the Security Key in a separate email, the Secure Key will be listed in **bold**.


Ichannel Demo Site file download Secure Key: **39925114**

CONARC iCHANNEL

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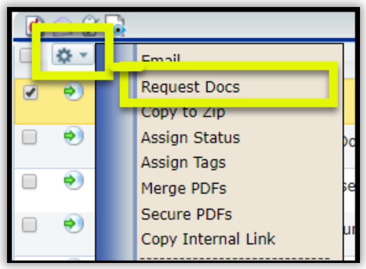
Document Feature: Request Docs

Gear Icon – Request Docs

Step	Action
	There are times a user needs to request a document(s) from other co-workers or clients. Use the **Request Docs** feature to send an email to your recipient(s).



Select a **document(s)** from the File Listing area. *Hover* over the **Gear** icon, the action list will display. *Click* **Request Docs.**

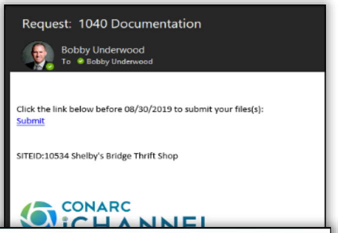
The **Compose Email** window will display.

Depending on your **Security Group** permissions, a few available actions are:

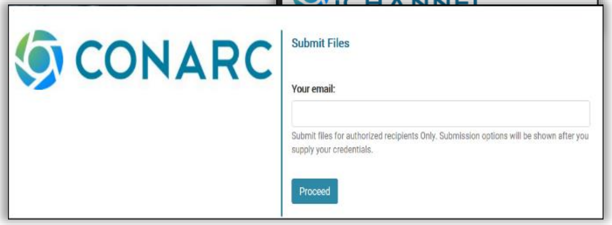
- **From:** - *by default*, the sender's email address will be displayed. The **BCC Sender** checkbox *will be checked by default*. If you do not want to receive a copy of the email in your company Email Inbox, *deselect this option*.
- **To | Cc | Bcc:** – from the **Client Contacts** section, *select* **contacts** to send the document to by highlighting a contact, then *click* the " << " next to the appropriate field.
  - If a contact does not appear in the Client Contact list, you can *manually enter* an email address in any of the fields.
- **Subject (Required)** – *enter* a **description** for the subject of the email.
- **Email Category (Optional)** – in the **Select Category drop-down list**, *select* a **Parent | Child category** to tag the email. This will place a copy of the email in the File Listing.
- **Body** – *enter* any additional email text you want to send with your email.
  - If sending documents as a secure link, **do not remove** the **"---Document Links will display here---"**
- Expires – *enter* an **expiration date** for Request Docs request to be active.

- **Click** Send, the **Email Send Status** will display.

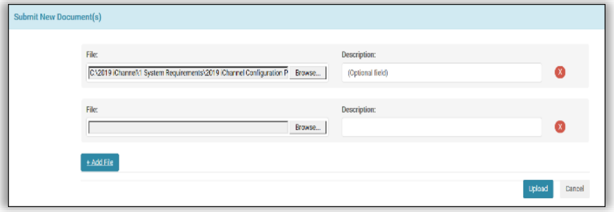
An email will arrive in the recipients Email Inbox.



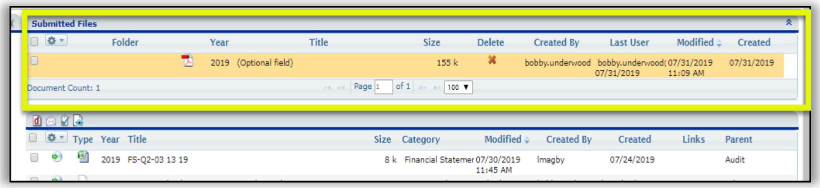
To submit files to authorized recipients only, *click* the [Submit]() link. *Enter* **Your email** address in the address field. Click Proceed.



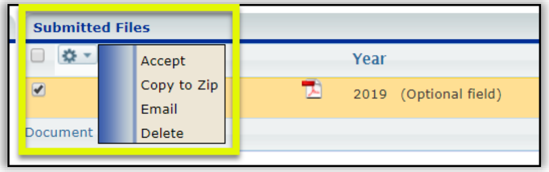
The Submit New Document(s) window displays. *Click* Browse... to **upload a document**. *Click* + Add File to **add additional files**. *Click* Upload to **upload all document(s)**.



Once the recipient has uploaded the documents(s), the document(s) will appear in the *Client File Listing area* in the **Submitted Files** section (highlighted yellow).



To accept the document(s), *check* the **checkbox** next to the Document(s). *Hover* over the **Gear** icon, the action list will display. From the list, *select* **Accept**, **Copy to Zip**, **Email**, or **Delete**.



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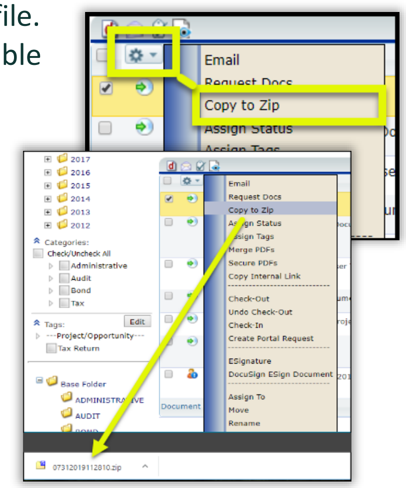
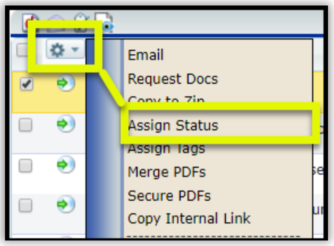
Document Feature: Copy to Zip

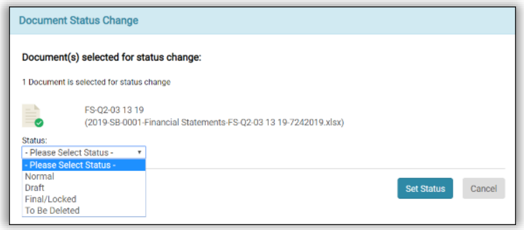
Gear Icon – Copy to Zip	
Step	**Action**
	There are times you might want to send several documents via email to a client. These might be too large to send individually. Use the **Copy to Zip** feature to send an email to your recipient(s) with all the documents zipped into a compressed file. The original document(s) remain in iChannel and are still accessible to others. *Select* a **document(s)** from the File Listing area. *Hover* over the **Gear icon,** the action list will display. *Click* **Copy to Zip.** The document(s) will be compressed into a Zip file**.** Once the document(s) are zipped, you can send using your company email system. Document Management Table of Contents



Document Feature: Assign Status

Gear Icon – Assign Status	
Step	**Action**
	To update the status of a document or multiple documents at once, use the **Assign Status** feature. Ability to change a document status is controlled by your Security Group Permissions set by your System IT Administrator. *Select* a **document(s)** from the File Listing area. *Hover* over the **Gear icon,** the action list will display. *Click* **Assign Status.** The **Document Status Change** window will display. If the status can be changed, the document icon will display with a "**green check mark**". If the status cannot be changed, the document icon will display with a "**red X**". Click Set Status to update the status on the document(s). Document Management Table of Contents





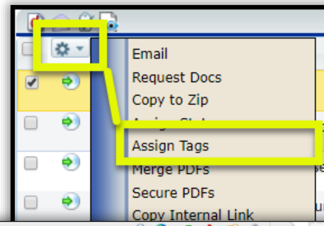
Document Feature: Assign Tags

Review [iChannel Document Management Area Overview – iChannel Filter Topic | Subtopic Category] **section to learn more about Tags.**

Gear Icon – Assign Tags

Step	Action

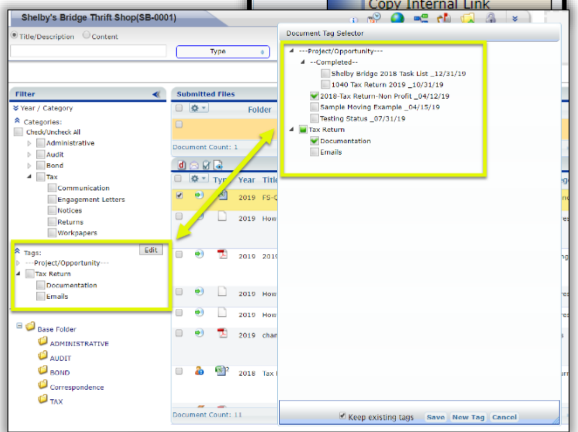
Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Assign Tags.**



The **Document Tag Selector** window will display.

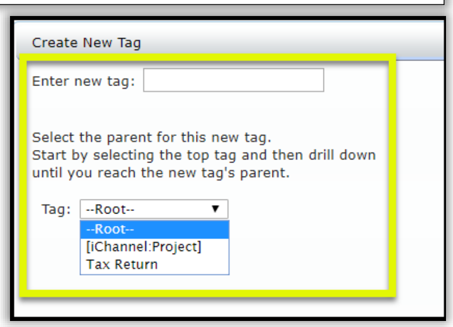
If the document(s) needs to be assigned (Tag) to a Project, *expand* the **Project Opportunity arrow** and *select* a **Workflow** from the list.

- If the doucment(s) needs to be assigned to a Tag (Topic | Subtopic) categories, *expand* the **Categories** and *place* a **check** next to the tag.

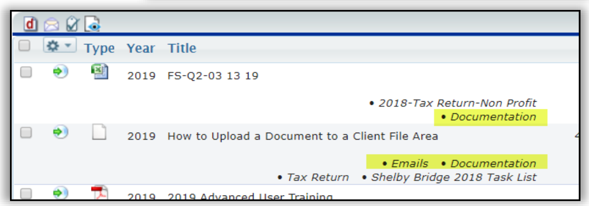


To create a new tag, *select* New Tag. The **Create New Tag** window display.

- *Enter* the **name** for the new tag in the **Enter new tag** field.
- In the **Tag Root drop-down list**, *select* the **parent for the new tag**. Start by selecting the top tag and then drill down until you reach the new tag's parent.
- Click Save.



Tags appear in the File Listing for the document.



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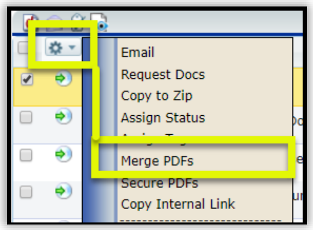
Document Feature: Merge PDFs

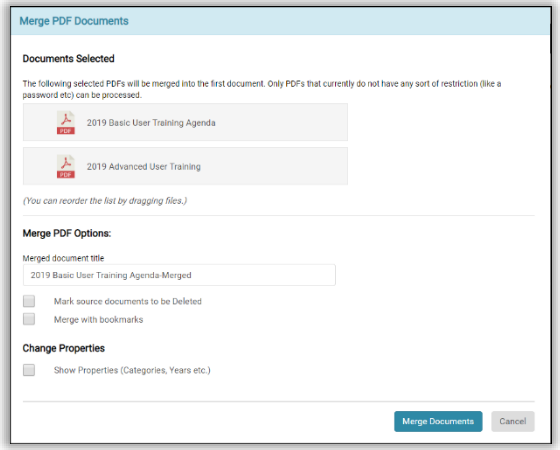
iChannel **PDF Merge** feature will not merge any PDFs documents that have any type of security or passwords set on the documents.

Gear Icon – Merge PDFs

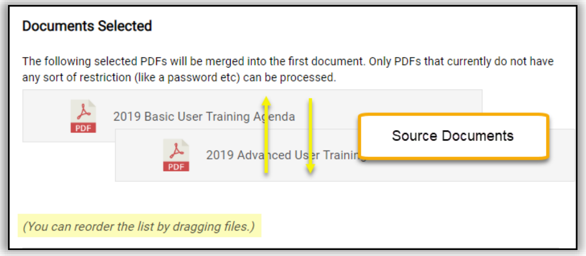
Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Merge PDFs.**



The **Merge PDF Documents** window will display.

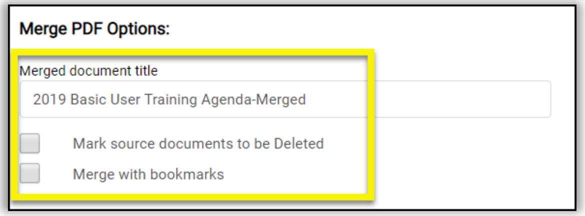


- In the **Documents Selected** area, the documents(s) you selected (source documents) to merge will display.



  You can *reorder* the list by **dragging files**. *Click* on a document, *hold down left-side of your mouse* and **drag-and-drop** the documents in the order to perform the merge.

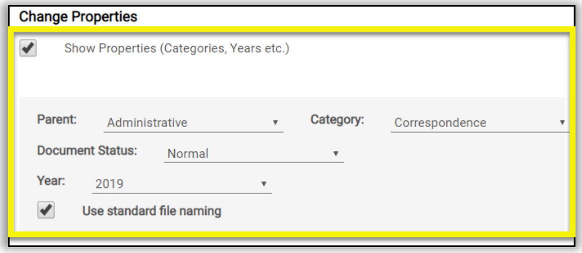
- In the **Merge PDF Options** area the new merge document will display and the word "**Merge**" will be added to the document title. To *update* the name, if necessary, *click* in the title field and update.



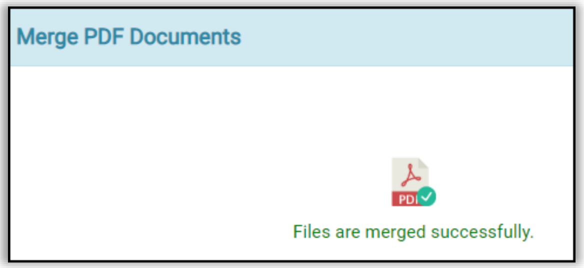
  - **Mark source documents to be Deleted** – if the merged documents (source documents) are no longer needed in iChannel, *check* **Mark source documents to be Deleted**. iChannel will mark the documents for deletion. If you wish to keep the source documents in iChannel, then leave this checkbox, **unchecked**.
  - **Merge with bookmarks** – if the merged documents (source documents) have bookmarks and you would like to merge the documents and maintain your bookmarks, *check* **Merge with bookmarks**.

- To update any properties associated with the merged document, *check* **Show Properties (Categories, Years, etc.)** checkbox.

  A new window will open. *Update* the **Parent**, **Category**, **Document Status**, **Year**, as necessary.



- To merge the documents, **click** Merge Documents. The **Merge PDF Documents** confirmation page displays.



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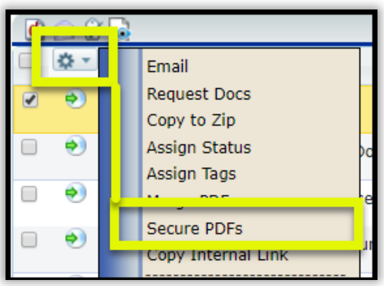
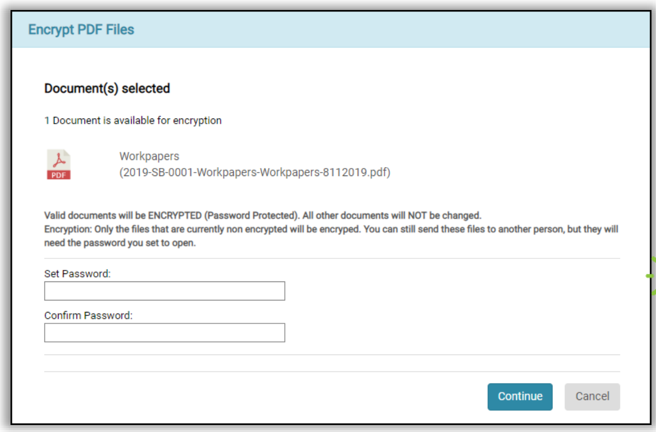
Document Feature: Secure PDFs

There are circumstances where document(s) are sensitive and before a user's or client can view or open the document, you want to provide an additional layer of security (encryption).

Gear Icon – Secure PDFs	
Step	**Action**
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear icon,** the action list will display. *Click* **Secure PDFs.** The **Encrypt PDF Files** window will display.



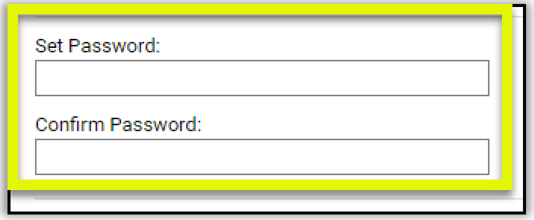


Valid documents will be **ENCRYPTED** (Password Protected). All other documents will NOT be changed.

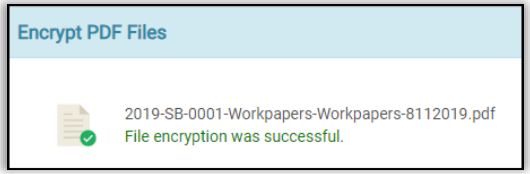
Encryption: Only the files that are currently non encrypted will be encrypted.

The user can still send these files to another person, but they will need the password to open the PDF document.

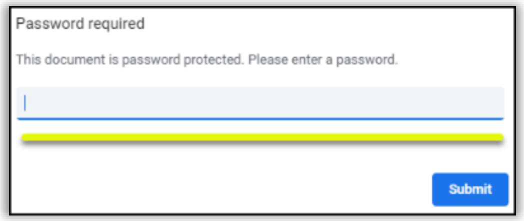
- In the **Set Password** field, *enter* a **password**. There is no criteria to set a password.. area, the documents(s) you selected (source documents) to merge will display.



- In the **Confirm Password** field, *re-enter* the password.
- *Click* Continue.
  - The **Encrypt PDF Files** confirmation window will display **"File encryption was successful".**



- When a document(s) is Encrypted, to open the document the user will need to *enter* the password in the **Password required** field.
- *Click* Submit



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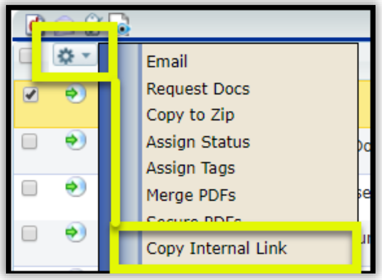
Document Feature: Copy Internal Link

There are circumstances where a user would like to share a document(s) in the File Area with another internal user(s), but not all document(s) in your File area. The **Copy Internal Link** feature will let you share out document(s) by making a copy of the document(s) where you can share out the document(s) via a Link. Once you have copied the link, you can paste in an email and share with another user, for an example.

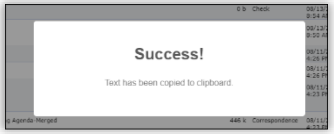
When the user(s) clicks the link, the use(s) will only have access to the File Area where the document(s) reside and will only have access to those document(s) identified in the Copy Internal Link.

Gear Icon – Copy Internal Link

Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** icon, the action list will display. *Click* **Copy Internal Link.**



The **Success! Text has been copied to the clipboard** window will display.



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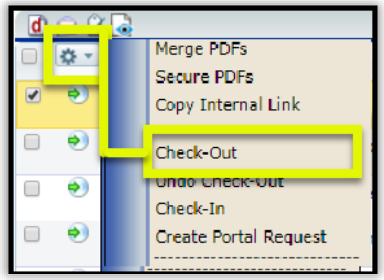
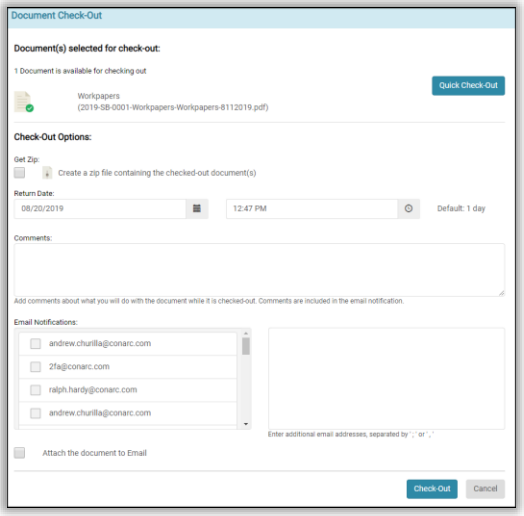
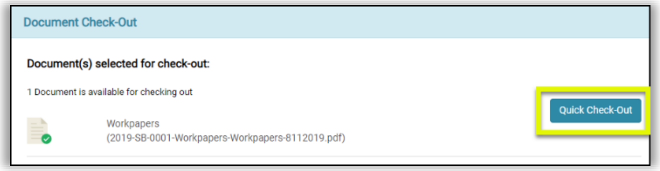
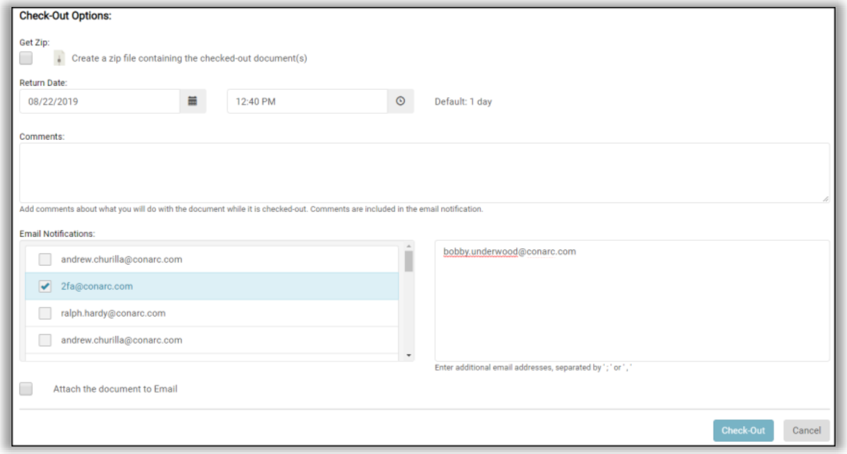
Document Feature: Check-Out | Undo Check-Out | Check-In

- **Check-Out** – user(s) need the ability to quickly access document(s) to share with other user(s) or client(s). It's key to working in today's face paced mobile environments.
    - When the document(s) is **Checked-Out**, the document(s) will be *set to* **read-only**. User(s) are required to download and save the document(s) locally for offline editing by clicking the link and select "Save" or "Save As".
    - Once finished editing the document(s), use the **Check-In** feature to upload the document(s) back to the **File Area** in iChannel.
    - While the document(s) are checked out, other user(s) can **only view**, but not modify the document(s) in iChannel.
    - On the **Document Check-Out** screen, user(s) can add additional information about the check-out in the **Check-Out Options**.

Gear Icon – Check-Out	
Step	**Action**
	*Select* a **document(s)** from the File Listing area. *Hover* over the **Gear**  **icon,** the action list will display. *Click* **Check-Out.**  The **Document Check-Out** window will display.  [Document Management Table of Contents]()
Quick Check-Out	iChannel also provides user(s) the option to do a **Quick Check-Out**. The Quick Check-Out feature will quickly check-out the document(s) without setting an additional Check-Out Options. 

Check-Out Options:

- In the **Check-out Options** section:
  - (Optional) *Check* the **Get Zip** checkbox if you want to *Create a zip file containing the checked-put document(s).*
  - (Optional) Check Out Information, *enter* a **Return Date**, *enter* a **Return Time**. These field define when the expectation for the document to be check-in.
    - By *default*, iChannel sets the return date to **1-day**; this can be customized to a different number of days. Please contact you System Administrator.
  - (Optional) **Comments** allow the user to provide additional information about the doucment while it's checked-out.
    - All comments are *saved* in the **Document Hist**ory
  - (Optional) **Email Notifications** are a great tool to nofify other users when working in a collobrative environement. *Select* **user(s) email addresses** from the list or enter email addresses manually (Internal or External email addresses).
  - (Optional) *Check* the **Attach the document to Email** checkbox if you would like to attach the document(s) to the email.
- *Click* Check-Out to check-out the document(s). The icon will update to to indicate the document(s) have been checked-out.



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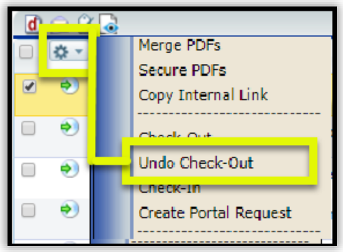
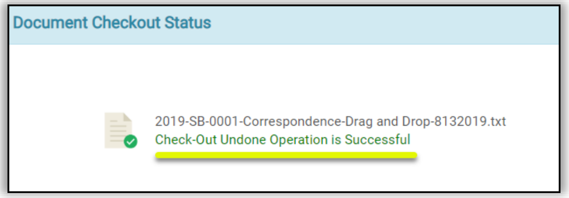
Gear Icon – Undo Check-Out

Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Undo Check-Out.** The **Document Checkout Status** window will display. 



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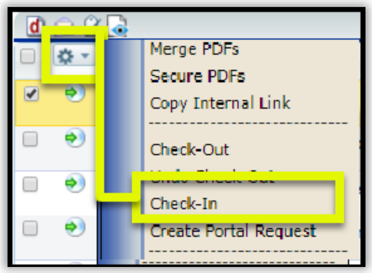
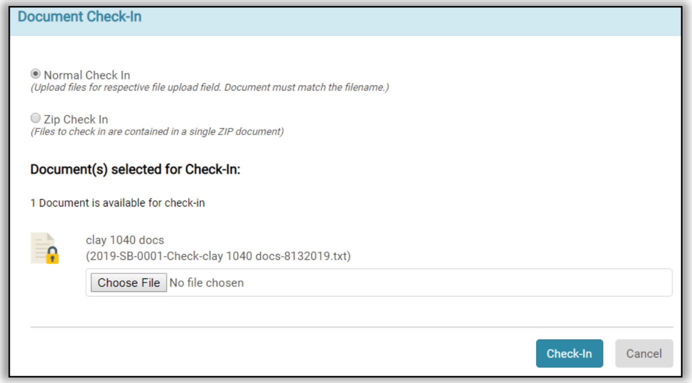
Gear Icon – Check-In

Step **Action**

Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Check-In.**



The **Document Check-In** window will display.



- **Normal Check In** – to recheck-in the file that was checked-out, *select* **Normal Check-In** option.
- **Zip Check In** – document(s) to check in are contained in a single document.

Document(s) being Checked-In, **must match** the filename of the document(s) checked-out.

Document(s) selected for Check-In:

- The **Checked-Out** document name will display.
- *Select* Choose File to *search* for the **Checked-Out** document.
- *Click* Check-In to check-in the document(s). The icon will *update* to which indicate the document(s) have been checked in.

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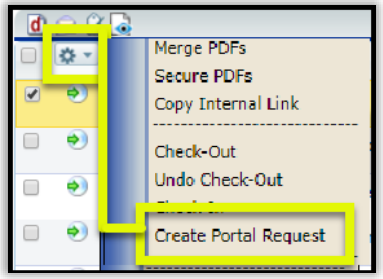
Document Feature: Create Portal Request

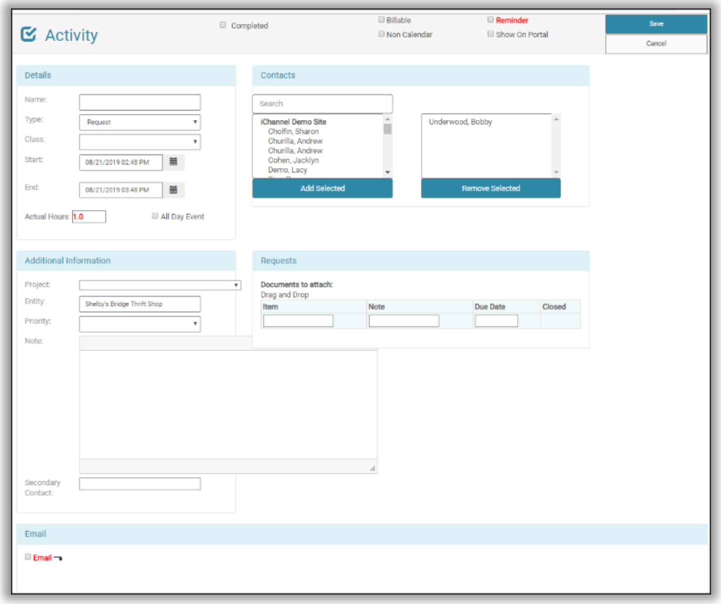
The Create Portal Request allows the user to make a request for document(s) via the Portal. To make the request, users will create an Activity (task) show on the portal for their clients to access and upload the requested document(s).

Gear Icon – Create Portal Request

Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Create Portal Request.**



The



Activity window will display.

Details

- **Name** – *enter* the **Name** of the Activity (Portal Request).
- **Type** – *by default*, **Request** will populate in the **Type** field.
- **(Optional) Class** – *select*, if applicable, a **Class** type from the drop-down list.
- **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is all-day event, *select* the **All Day Event checkbox**.

Additional Information

- **Project** – if requested document(s) are part of a project, *select* the **Project** from the drop-down list.
- **Entity** – *by default*, the Entity will pre-populate with the entity name. If you need to change the entity, *select* the **Entity** drop-down list.
- **(Optional) Priority** – this optional field can be: **Blank**, **High**, **Medium**, or **Low**.
- **(Optional) Note** – enter any notes that are related to the portal request.

Contacts

- **Contacts** –
  - *Highlight* a contact from the pre-populated contact list, *click* Add Selected
  - *Highlight* a contact from the removed selected section, *click* Remove Selected

Tool Tip:

Double-click a Contact to **Add** a contact   *Double-click* to **Remove** a contact from the Remove Selected section

To *select multiple* **Contacts**, hold down the **Ctrl key** and select contacts

- **Requests** – in the **Documents to attach** section, the name of the document(s) to show on the portal (Portal Request) will be listed.
  - To **add** an **additional request,** *manually enter* the item description in the **Item** field.
  - (Optional) To **add** notes on the requested item**,** *manually enter* notes in the **Notes** field.

- In the **Activity banner**, *select* **Show On Portal** checkbox. This will ensure the document(s) is visible on the Portal.
- *Click* Save.

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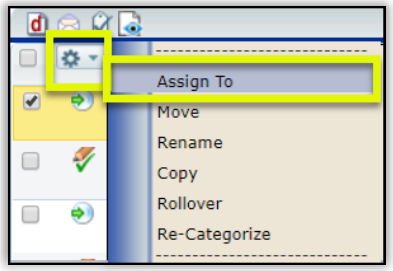
Document Feature: Assign To

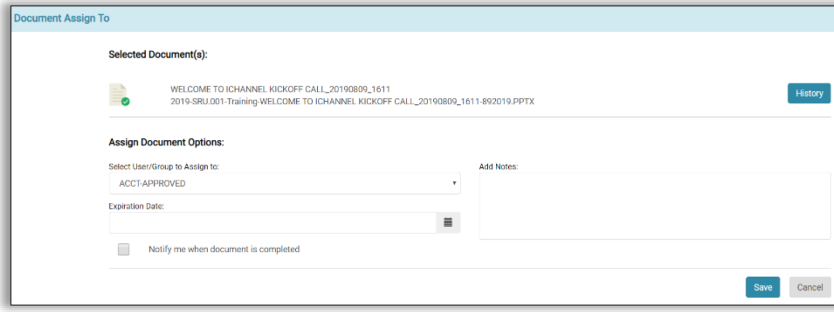
Documents are assigned to an internal user(s). User(s) have two options when working with the **Assign To** feature. A User can permanently assign document(s) to another user or they can temporarily assign document(s) to another user and set an expiration date for the length of time that document or documents are assigned. To re-assign a document(s) to another internal user, select the Assign To feature.

Gear Icon – Assign To

Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Assign To.** 

Assign Document Options:

The **Document Assign To** window will display.



- **Select User/Group to Assign to:** drop-down list, *select* a **User/Group**.
- **Expiration Date** field (optional): use the date-picker icon to set an expiration date.
- To have a user notified when a document is completed, **check** the **Notifiy me when document is completed checkbox**.
- **Add Notes** field (optional): *enter* any notes to attach with the assign doucments to another user.
- *Click* Save.

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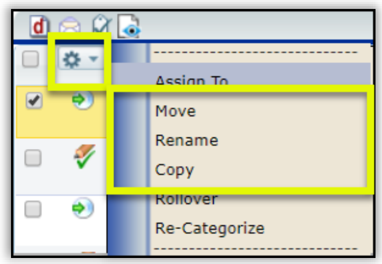
Document Feature: Move | Rename | Copy

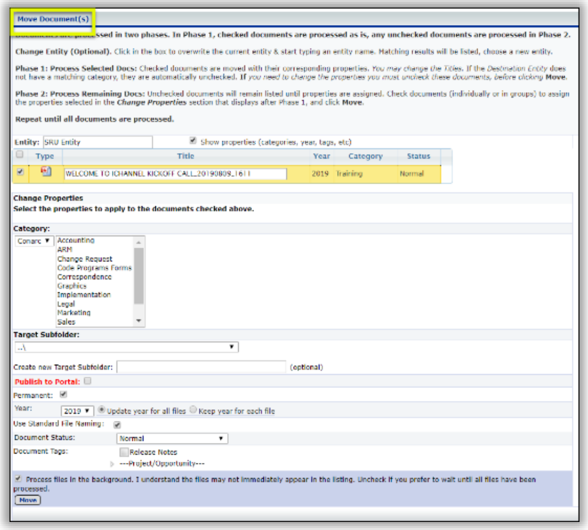
User(s) have the ability to:



- **Move**: this feature allows a document to be moved to a new Site, Category (Topic | Subtopic), to name a few.
- **Rename**: this feature allows the user(s) to rename the document.
- **Copy**: this feature allows the user(s) to make an internal copy of the document.

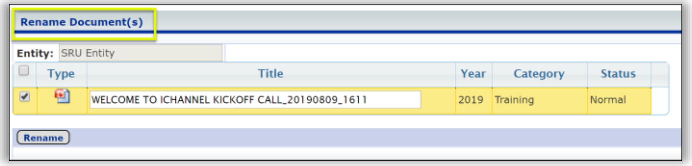
Gear Icon – Move | Rename | Copy

Step	Action
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Move**.



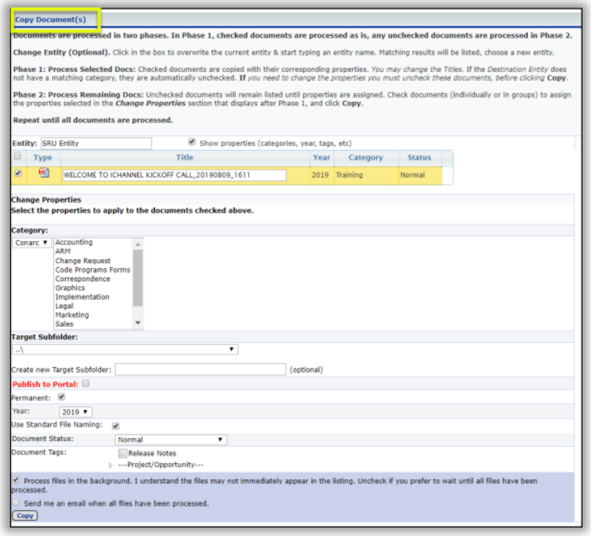
- **Entity**: *click* the **entity field** to search for a Entity. Enter at least three characters.
- **Title**: if the document name needs to be updated, *click* the **Title** field and update.
- **Show properties (categories, year, tag, etc.)**: *check* the *checkbox* to display the **Change Properties**. Select the properties to apply to the documents.
- **Publish to Portal**: if the document needs to be published to the client portal with any changes, *check* the **Publish to Portal checkbox**.
- **Permanent:** *by default*, the Permanent checkbox is checked.
- **Year:** if the year needs to be updated, *click* the **drop-down list**.
- **Document Status:** if the status of the document needs to be updated, *click* the **drop-down list.**
- **Document Tag:** to add a Tag or to assign the document to a Workflow, *click* the "**arrow**" to expand the **Tag | Workflow** list.
- *Click* **Move.**

Select a **document(s)** from the File Listing area. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Rename**.



- **Title**: if the document name needs to be renamed, *click* the **Title** field and enter a new title.

Select a **document(s)** from the File Listing area. *Hover* over the **Gear** icon, the action list will display. *Click* **Copy**.



- **Entity**: *click* the **entity field** to search for a Entity. Enter at least three characters.
- **Title**: if the document name needs to be updated, *click* the **Title** field and update.
- **Show properties (categories, year, tag, etc.)**: *check* the *checkbox* to display the **Change Properties**. Select the properties to apply to the documents.
- **Publish to Portal**: if the document needs to be published to the client portal with any changes, *check* the **Publish to Portal checkbox**.
- **Permanent:** *by default*, the Permanent checkbox is checked.
- **Year:** if the year needs to be updated, *click* the **drop-down list**.
- **Document Status:** if the status of the document needs to be updated, *click* the **drop-down list.**
- **Document Tag:** to add a Tag or to assign the document to a Workflow, *click* the "**arrow**" to expand the **Tag | Workflow** list.
- *Click* **Copy.**

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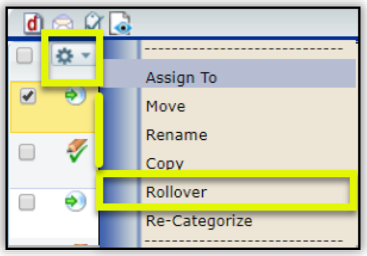
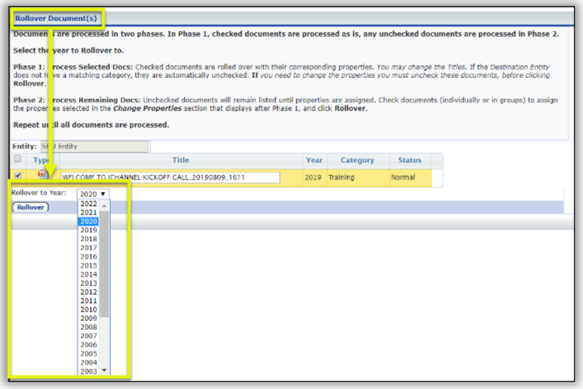
Document Feature: Rollover

User(s) could have a document(s) where those document(s) will be used year-over-year with a client. The Rollover features allows the user to rollover (copy) a document(s) to another year. The document will be an exact copy of the original document(s) that is being rolled over.

Gear Icon – Rollover	
Step	**Action**
	Select a **document(s)** from the File Listing area. *Hover* over the **Gear** icon, the action list will display. *Click* **Rollover**. 

- **Entity**: *click* the **entity field** to search for a Entity. Enter at least three characters.
- **Title**: if the document name needs to be updated, *click* the **Title** field and update.
- **Rollover to Year**: *click* drop-down list and select a new year.
- *Click* **Rollover.**



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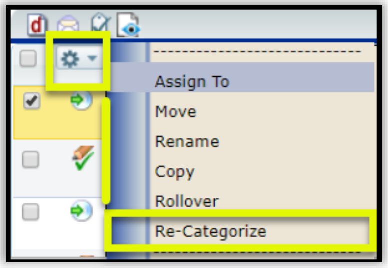
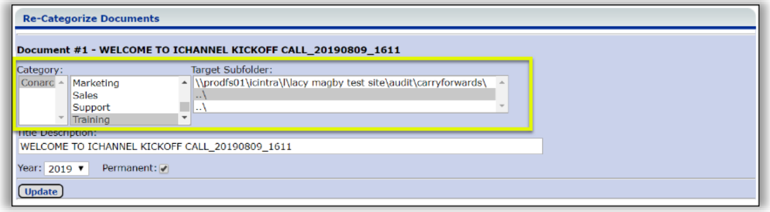
Document Feature: Re-Categorize

The **Re-Categorize** features allows for a document(s) to be assigned to new Categories (Topic | Subtopic) in iChannel.

Gear Icon – Re-Categorize	
Step	**Action**
	*Select* a **document(s)** from the File Listing area. *Hover* over the **Gear**  **icon,** the action list will display. *Click* **Re-Categorize**. • **Category:** select a Category (Topic) and Subtopic, as necessary. • *Click* **Update.**   Document Management Table of Contents

Document Feature: Publish and Link

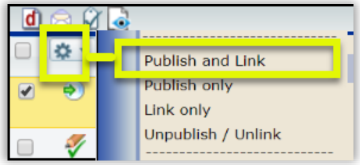
The **Publish and Link** feature allows for a document(s) to be published to the iChannel Portal for client(s) to access and additional will link that document(s) to another Site for access.

Clients (Portal Users) only have access to the document(s) you publish to the iChannel Portal from their respective File Area. Security Group Permission control what can been viewed on the Portal.

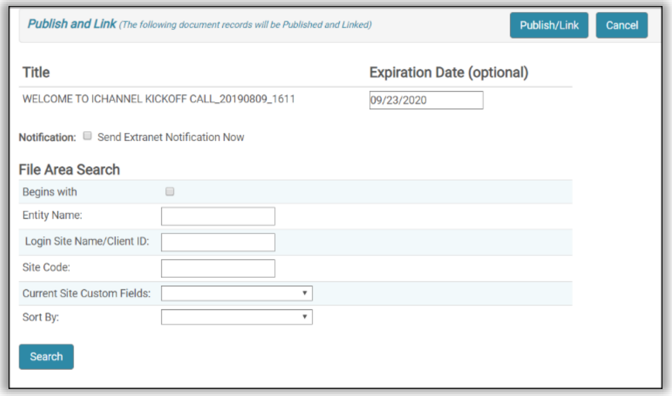
Gear Icon – How to Publish and Link

Step | **Action**

Select a **document(s)** from the **File Listing Area**. *Hover* over the **Gear** icon, the action list will display. *Click* **Publish and Link.**



The **Publish and Link** window will display.

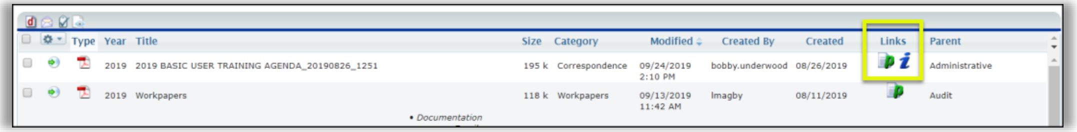


- **Expiration Date (Optional)** – this *optional field* allows you to set an expiration date. This date determines how long the Published document is available on the Portal.
- **Notification**: - to send a notification to the Portal, *check* the checkbox **Send Extranet Notification Now**.
- **File Area Search** – next, in the File Ares Search fields, *search* for the **Site** to which the document(s) should be linked to.
- *Click* Search.
- **Search Results:** in the Portal Topic/Subtopic list, *select* all **Topic/Subtopics** that apply.
- If the information on the Publish and Link page is correct, *select* Publish/Link.

The Document(s) have been published/linked. message will display.

Published | Linked Document(s) – Icon

- After a document(s) has been Published and Linked, in the **File Area** a new icon will appear for published | linked document(s).



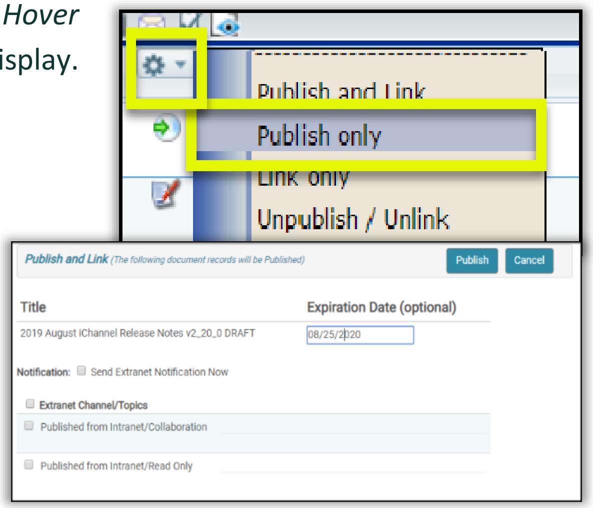
Document Feature: Publish Only

The **Publish Only** features allows for a document(s) to published to the iChannel Portal for client(s) to access.

Gear Icon – How to Publish Only a Document(s) to the Portal

Step | **Action**

Select a **document(s)** from the **File Listing Area**. *Hover* over the **Gear** icon, the action list will display. *Click* **Publish Only.**



The **Publish and Link** window will display.

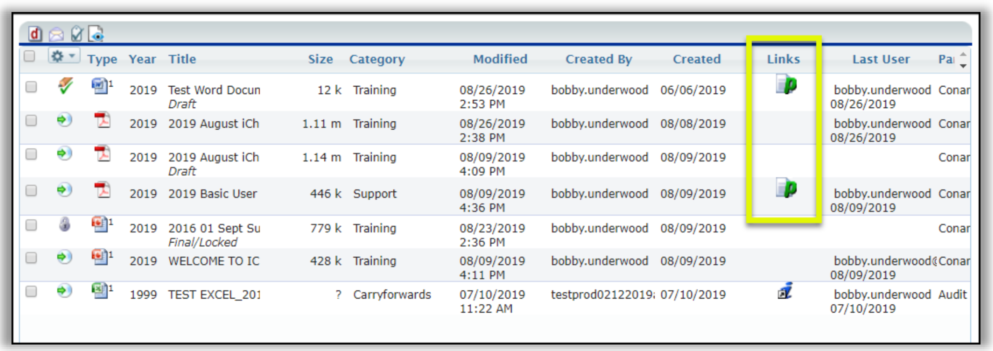
- **Title** – the document(s) names will display.
- **Expiration Date (Optional)** – this *optional field* allows you to set an expiration date. This date determines how long the Published document is available on the Portal.
- **Notification**: - to send a notification to the Portal, *check* the checkbox **Send Extranet Notification Now**.
- **Extranet Channel | Topics** – To publish the document(s), *select* all **Topic | Subtopics** that apply.

Click Publish.

The Document(s) have been published/linked. message will display.

Published Document(s) – Icon

- After a document(s) has been Published, in the File Area a new icon will appear for published document(s).

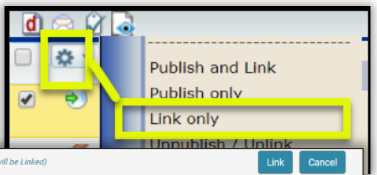


Type	Year	Title	Size	Category	Modified	Created By	Created	Links	Last User	Pa
	2019	Test Word Docun *Draft*	12 k	Training	08/26/2019 2:53 PM	bobby.underwood	06/06/2019		bobby.underwood 08/26/2019	Conar
	2019	2019 August iCh	1.11 m	Training	08/26/2019 2:38 PM	bobby.underwood	08/08/2019		bobby.underwood 08/26/2019	Conar
	2019	2019 August iCh *Draft*	1.14 m	Training	08/09/2019 4:09 PM	bobby.underwood	08/09/2019			Conar
	2019	2019 Basic User	446 k	Support	08/09/2019 4:36 PM	bobby.underwood	08/09/2019		bobby.underwood 08/09/2019	Conar
	2019	2016 01 Sept Su *Final/Locked*	779 k	Training	08/23/2019 2:36 PM	bobby.underwood	08/09/2019			Conar
	2019	WELCOME TO IC	428 k	Training	08/09/2019 4:11 PM	bobby.underwood	08/09/2019		bobby.underwood(08/09/2019	Conar
	1999	TEST EXCEL_201	?	Carryforwards	07/10/2019 11:22 AM	testprod02122019:	07/10/2019		bobby.underwood 07/10/2019	Audit

Document Feature: Link Only

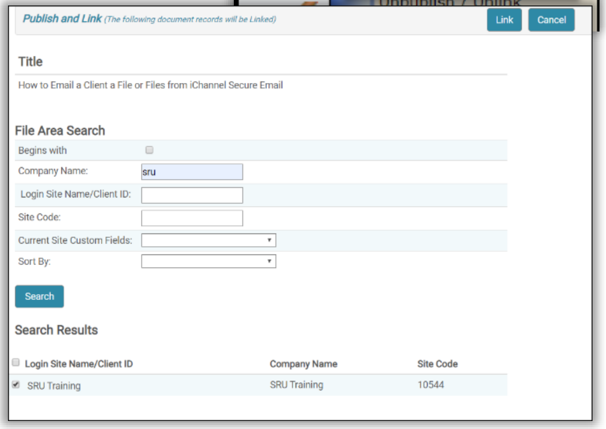
The **Link Only** features allows for a document(s) to be linked to another Site for access.

Gear Icon – How to Publish and Link	
Step	**Action**



Select a **document(s)** from the **File Listing Area**. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Link Only**.

The **Publish and Link** window will display.

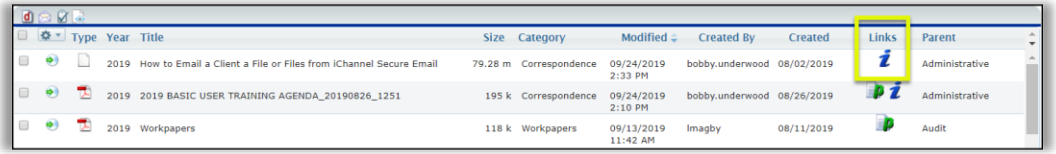


- **File Area Search** – next, in the File Ares Search fields, *search* for the **Site** to which the document(s) should be linked to.
- *Click* Search.
- **Search Results:** in the Search Results list, *select* the **Site** that applies.
- If the information on the Publish and Link page is correct, *select* Link.

The Document(s) have been published/linked. message will display.

Published | Linked Document(s) – Icon

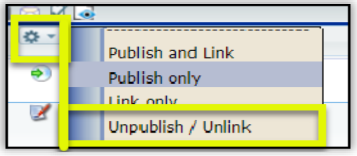
- After a document(s) has been Linked, in the **File Area** a new icon will appear for linked document(s).



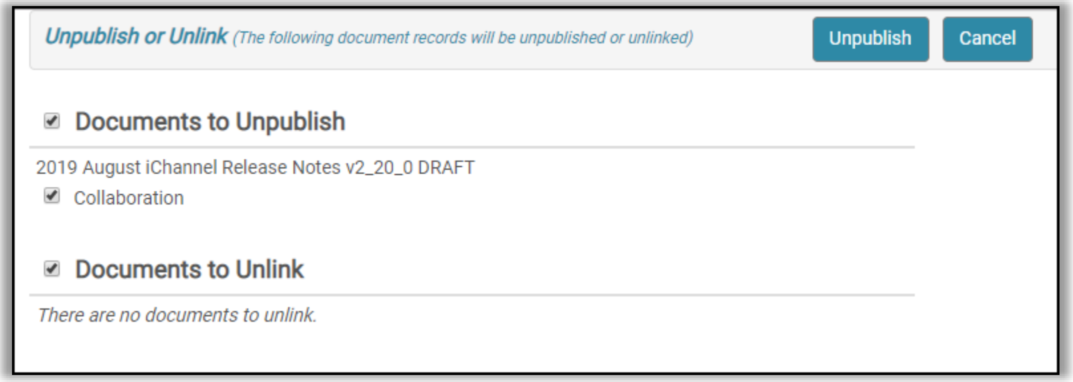
Document Feature: Unpublish / Unlink Document(s)

Gear Icon – How to Unpublish Document(s)	
Step	**Action**

Select a **document(s)** that has the icon from the **Entity File Area**. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Unpublish / Unlink.**



The **Unpublish or Unlink** window will display.



- **Documents to Unpublish** – by *default*, this checkbox is checked. A list of document(s) will be listed below.
  - **Topic** – the topic the document(s) were assigned will display, by *default* the checkbox will be checked.
- **Documents to Unlink** – by *default*, this checkbox is checked. If no document(s) have been linked, the message "*There are no document(s) to unlink*" will display.

Click Unpublish.

The Document(s) unpublished/unlinked successfully message will display.

Document Management Table of Contents

Document Feature: Copy to Folder (Append) | Copy to Folder (Replace)

Gear Icon – Copy to Folder (Append) | Copy to Folder (Replace)

Step	Action
	Copy to Folder (Append) • This feature requires that your Organization work with you iChannel Administrator before use. A default destination path is programmed into iChannel and the destination may also be overridden for each iChannel user. When choosing this option, users will place a copy of the document(s) into this dedicated path; most often used to copy to an ftp site. **Copy to Folder (Append)** • This feature requires that your Organization work with you iChannel Administrator before use. A default destination path is programmed into iChannel and the destination may also be overridden for each iChannel user. When choosing this option, all document(s) in this dedicated path will be deleted and then the selected document(s) are copied to the path so that a CD can be made of the destination folder.

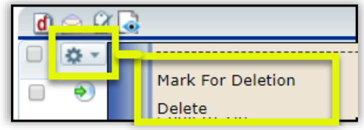
Document Management Table of Contents

Document Feature: Mark for Deletion

Gear Icon – How to Mark for Deletion Document(s)

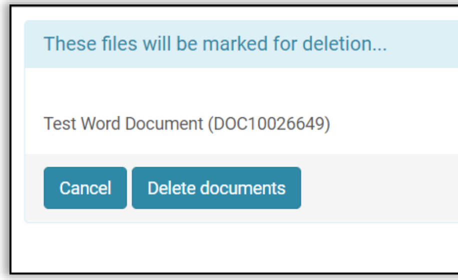
Step | **Action**

Select a **document(s)** from the **Entity File Area**. *Hover* over the **Gear** icon, the action list will display. *Click* **Mark for Deletion.**

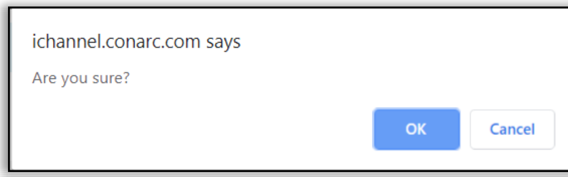


The **These files will be marked for deletion..** window will display.

- *Click* **Delete Document.**

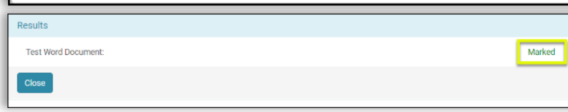


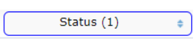
- *Click* **OK.**



The **Results** window will display.

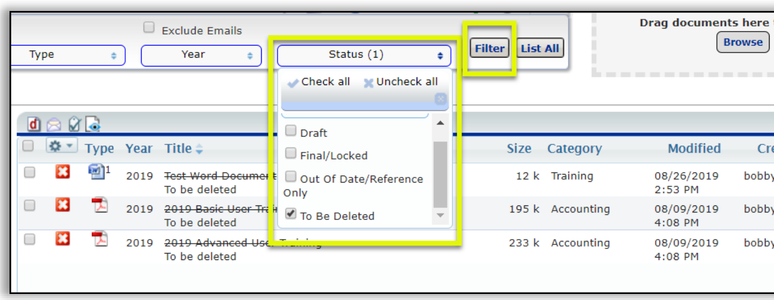
- *Click* **Close**.





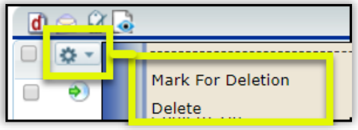
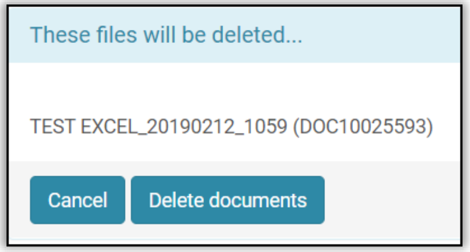
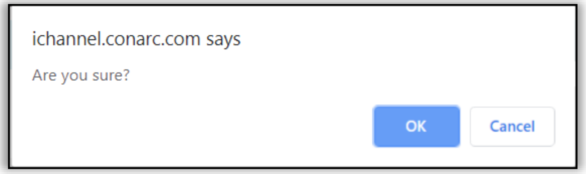
To *view* document(s) that have been **Marked for Deletion**:

- *Select* **Status** and from the drop-down list, *select* **To Be Deleted**.
- *Click* **Filter**.



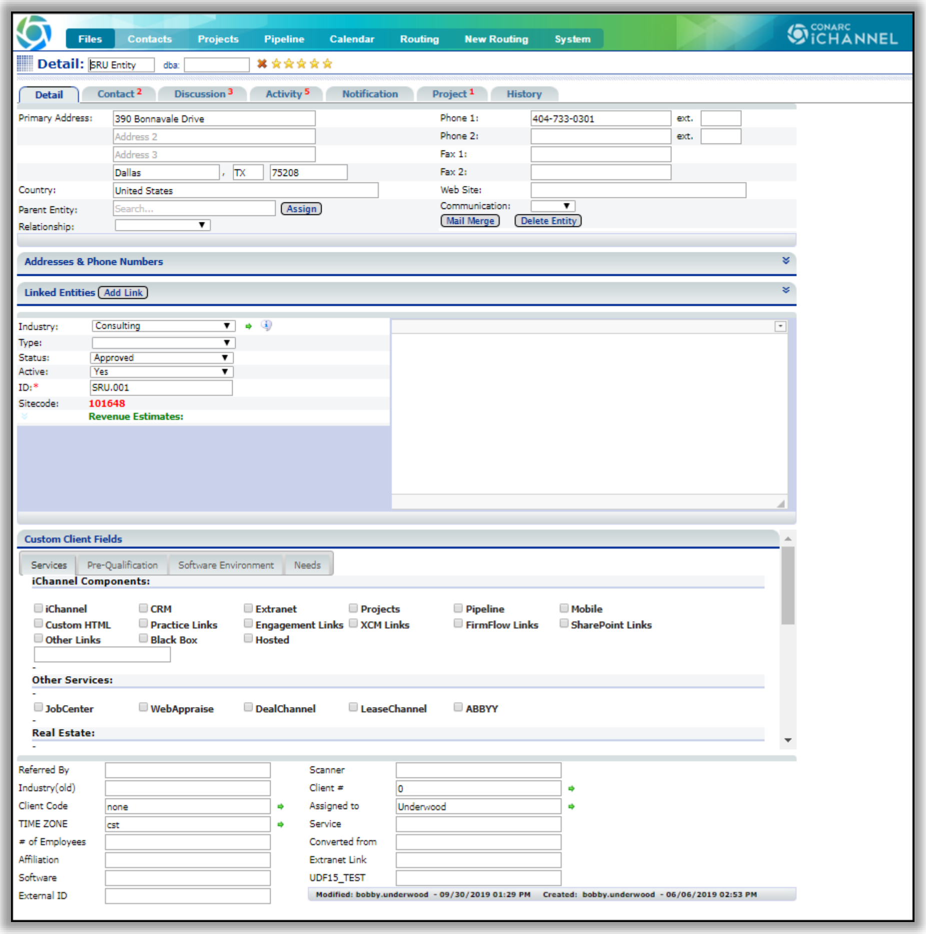
[Document Management Table of Contents]

Document Feature: Delete

Gear Icon – How to Delete Document(s)	
Step	**Action**
	Select a **document(s)** from the **Entity File Area**. *Hover* over the **Gear** **icon,** the action list will display. *Click* **Delete.**  The **These files will be deleted....** window will display. *Click* **Delete Document.**  *Click* **OK.**  The **Results** window will display. *Click* **Close**.  [Document Management Table of Contents]

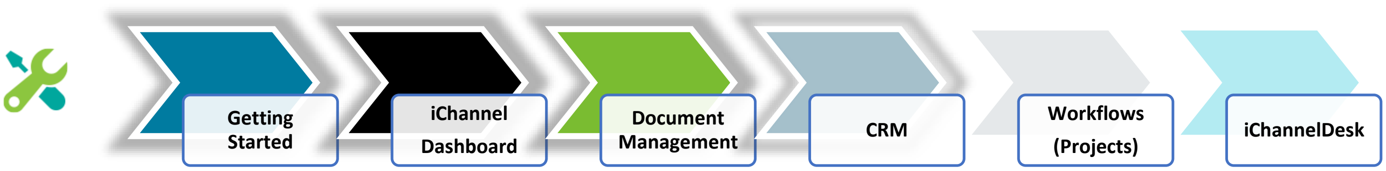
Module 4: iChannel CRM

iChannel **CRM (Contact Relationship Manager)** tool provides your Organization with a central contact management database allowing users to efficiently manage client relationships, vendors, employees and interactions users have with their clients.



Module Overview

The follow exercise will introduce the building blocks and tools of the **iChannel CRM**.

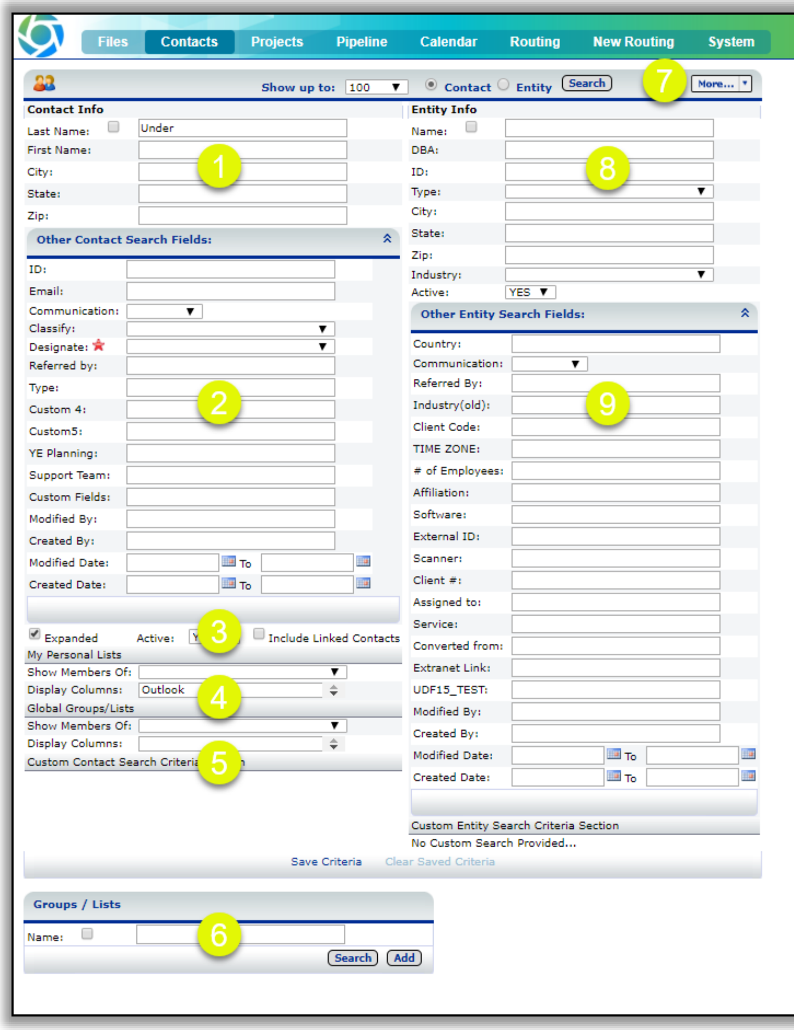


In this module, **CRM**, the following topics will be reviewed in detail:

- Contact Search Screen
- How to Search a Contact or Entity
- Add a Site (CRM Only)
- Add a Site (CRM & Document Management Area)
- Site Detail Screen Overview
    - Contacts Tab: Add a Contact | Duplicate Contact
    - Discussion Tab
    - Activity Tab
    - Notification Tab
    - Project Tab
    - History Tab
- How to Create a Contact
- How to Identify and Resolve a Duplicate Contact
- How to Link a Contact
- How to Update a Contact
- How to Add a Group Group/List

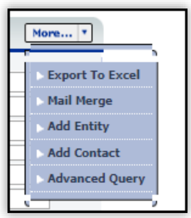
Contact Search Screen

From the **iChannel Dashboard Banner**, select **Contacts** link to open the Contact Search Screen. From this screen, users have the ability to perform complex searches on your contacts or sites.



CRM: Contact Search Screen

CRM – How to Search for a Contact | Entity	
Step	**Action**
1	**Contact Info** *Search* for a contact by **Last** | **First** |**City** | **State** or **ZIP** *Click* the **Search** button to return results.
2	**Other Contact Search Fields (UDF – User Defined Fields)** These fields are unique to your organization and are optional. An organization can have up to 15 UDF fields. Contact your System IT Administrator if you need to have customized UDF fields.
3	**Search Result Options** **Expanded** – Displays the address information in the search results. **Inactive** – Includes inactive contacts in the search results.

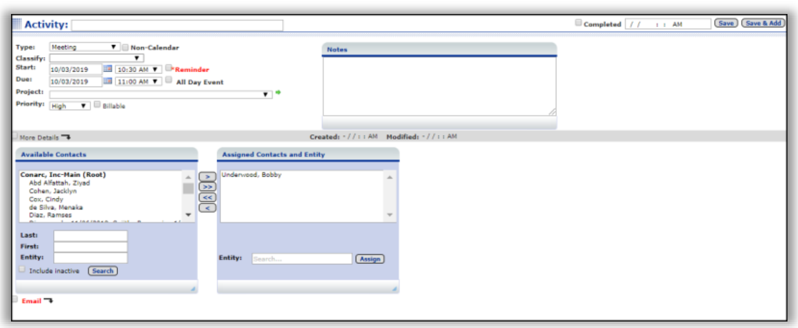
	• **Linked Contacts** – Includes any linked contacts in the search results when performing an Entity search.
4	**My Personal List** – Allows each user to create a custom list of contacts. The Outlook list is used to Sync with Microsoft Outlook. • **Show Members Of** – this drop-down list to display the contacts that are in the selected group. • **Display Columns** – allows you to choose the columns you would like displayed in the search results quickly add/remove contracts from the selected list.
5	**Global Groups | Lists** – these search settings correspond to the groups in the Group | Lists section list. • **Show Members of drop-down list** – display the contacts that are in the selected group(s). • **Display column** – allows users to choose the columns you would like displayed in the search results to quickly add/remove contacts from the selected list.
6	**Save Search Criteria** • *Click* the **Save Criteria** button at the bottom of the screen to save the search fields on the screen. This is helpful if you will being search for the same fields over and over. • *Click* the **Clear Criteria** button to clear any saved search criteria.
7	**More drop-down list –** your System IT Administrator will determine if the user has access to any of the items in the list. • **Export to Excel** • **Mail Merge** • **Add Entity** • **Add Contact** • **Advanced Query** 
8	**Entity Info** • *Search* for a Site by **Name | DBA | ID | Type | City | State | ZIP | Industry | Active** • *Click* the **Search** button to return results.
9	**Other Entity Search Fields** • These fields are unique to your organization and are optional.

CRM: How to Search for a Contact

CRM – How to Search for a Contact	
Step	**Action**
1	In the Contact Info, Other Contact Search Fields, Search Results Options, My Personal List, Global Groups | List fields, enter as much or as little information to perform the contact search. • *Click* the **Search** button to return results. The **Contact Search Result** window will display.

Details

1. **File Area** – next to the contact name, *click* the icon to navigate to the File Area for the Site.
2. **Contact Name** – *click* the **contact name link** to access the contacts personal details page.
3. **Site Name** – *click* the **site link** to access the site details page.
4. **Contact Email** – *click* the **email address** link for the contact to start an email for the selected contact.
5. **Email Selected Contacts** – *select* the contacts (checkbox) you would like to start an email, *select* **Email Selected Contacts** button.
6. **Calendar Activity** – *click* the **Create Activity** button. The Activity page will display. Fill out the information using the fields to create the Activity type for that contact selected.



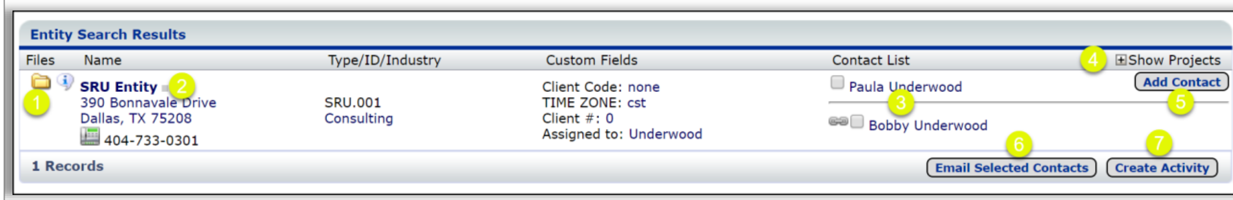
- **Name** – *enter* the **Name** of the Activity (Portal Request).
- **Type** – *by default*, **Meeting** will populate in the **Type** field. Use the drop-down list to change the type.
- **(Optional) Classify** – *select*, if applicable, a **Class** type from the drop-down list.
- **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is an all-day type, *select* **All Day Event checkbox**.
- **Workflow (Project)** – if the activity is associated with a workflow, use the drop-down list to search for Workflow.
- **Priority** – use the drop-down list to select the priority for the activity.
- **Notes** – enter any additional notes related to the Activity.
- **Available Contacts – Assigned Contacts and Entity**
  - From the **Available Contacts** list *select* a **contact(s)** to add to **the Assigned Contacts and Entity**.
  - TIP: You can *double-click* a **contact** to move contacts between the Available and Assigned windows.

- **Search for Contact | Site**: *enter information* in the **Last | First | Entity** fields to **search** for a contact | site.
- **Email** – check the email box to send an email to an Internal User or add Internal notes in the available field.
- **Completed** – by *selecting* the **Completed checkbox**, the current date | time will automatically populate.
- *Click* Save | Save & Add.

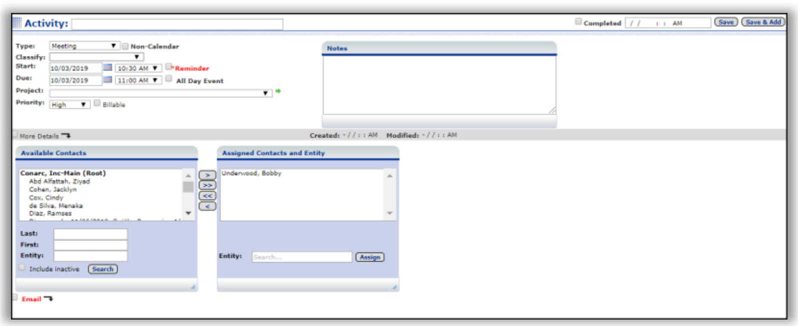
CRM: How to Search for a Site

CRM – How to Search for a Site	
Step	**Action**
1	*Select* **Contacts** from the banner. *Select* the **Entity radio option**. In the Name, DBA, ID, Type, City, State, ZIP, Industry, Active fields, enter as much or as little information to perform the site search. *Click* the **Search** button to return results.

The **Entity Search Results** window will display.



1. **File Area** – next to the site name, *click* the icon to navigate to the File Area for the Site.
2. **Site Name** – *click* the **site link** to access the site details page.
3. **Contact Name** – *click* the **contact name link** for the contact to navigate to the Contact Detail info page.
4. **Show Projects** – *click* the Show Projects to show any workflows associated to the site.
5. **Add Contact** – *click* the **Add Contact** to add another contact to the site.
6. **Email Selected Contacts** – *select* the contacts (checkbox) you would like to start an email, *select* **Email Selected Contacts** button.
7. **Calendar Activity** – *click* the **Create Activity** button. The Activity page will display. Fill out the information using the fields to create the Activity type for that contact selected.



Details

- **Name** – *enter* the **Name** of the Activity (Portal Request).

	• **Type** – *by default*, **Meeting** will populate in the **Type** field. Use the drop-down list to change the type.
	• **(Optional) Classify** – *select*, if applicable, a **Class** type from the drop-down list.
	• **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is an all-day type, *select* **All Day Event checkbox**.
	• **Workflow (Project)** – if the activity is associated with a workflow, use the drop-down list to search for Workflow.
	• **Priority** – use the drop-down list to select the priority for the activity.
	• **Notes** – enter any additional notes related to the Activity.
	• **Available Contacts – Assigned Contacts and Entity**
	  ○ From the **Available Contacts** list *select* a **contact(s)** to add to **the Assigned Contacts and Entity**.
	  ○ TIP: You can *double-click* a **contact** to move contacts between the Available and Assigned windows.
	• **Search for Contact | Site**: *enter information* in the **Last | First | Entity** fields to **search** for a contact | site.
	• **Email** – check the email box to send an email to an Internal User or add Internal notes in the available field.
	• **Completed** – by *selecting* the **Completed checkbox**, the current date | time will automatically populate.
	• *Click* Save Save & Add.

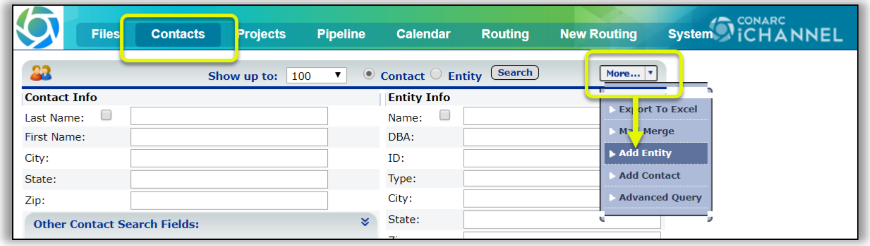
CRM: How to Create a Site (CRM Only)

Use the **How to Create a Site (CRM Only)** when you have a new prospect or lead; yet you do not have a need to create a Document Management Area. If your prospect or lead, develops into a Site where you'll need a Document Management Area, you'll need to work with your System IT Administrator to *create* a **SITE** record for the client.

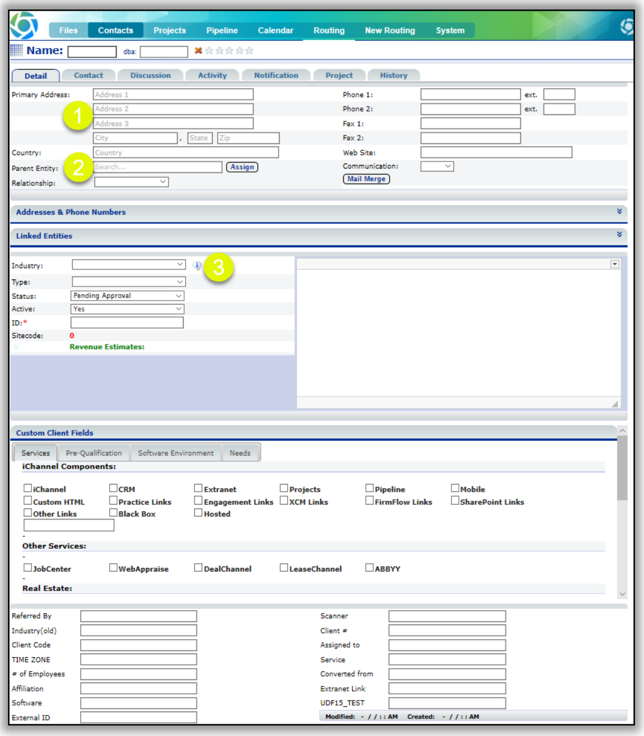
It is not uncommon that your System IT Administrator will create all Entities via an iChannel Interface; therefore, the How to Create a Site (CRM Only) is an optional feature one how to create manually.

Before adding a new Site, it is recommended that you search for the client name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

CRM – How to Create a Site (CRM Only)	
Step	**Action**
1	*Select* **Contacts** from the banner. *Select* the **More…** drop-down button. *Select* **Add Entity**.



The Site **Name** window will display.



1. **Entity Information** – Fill in as much information as necessary about the new entity.
2. **Parent Entity** – if the new Entity is part of a **Parent Entity**, *click* the **search field** and enter at least three-minimum characters to search for an entity. (Parent Entity is not required to create a new Entity site).
3. **Industry | Type | Status | Active** – *populate as necessary.*
4. *Click* Save

CRM: How to Create a Site (CRM & Document Management Area)

A second type of **Entity (Site)** is an Entity that also has a **Document Management Area**. Where users will manage their clients document(s), share document(s) or request document(s). To create an Entity that has a Document Management Area, the new Entity (Site) will be create from the **System > Sites** feature.

To create an Entity (Site) with a Document Management Area the new site will be created based off a “Template”. The Template hold all the File Area structure (categories | topics | subtopics, security, etc.) to name a few.

> **“Templates”** are defined by each Organization to create the Document Management Area. Your System IT Administrator in conjunction with your iChannel Implementation representative will define all “templates”.

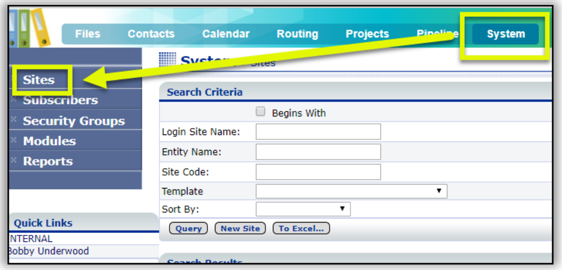
Before adding a new Site, it is recommended that you search for the client name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

CRM – How to Create a Site (CRM & Document Management Area)

Step | **Action**

1

Select **System** from the banner. *Select* **Sites**. The **System >>Sites** page ill display.

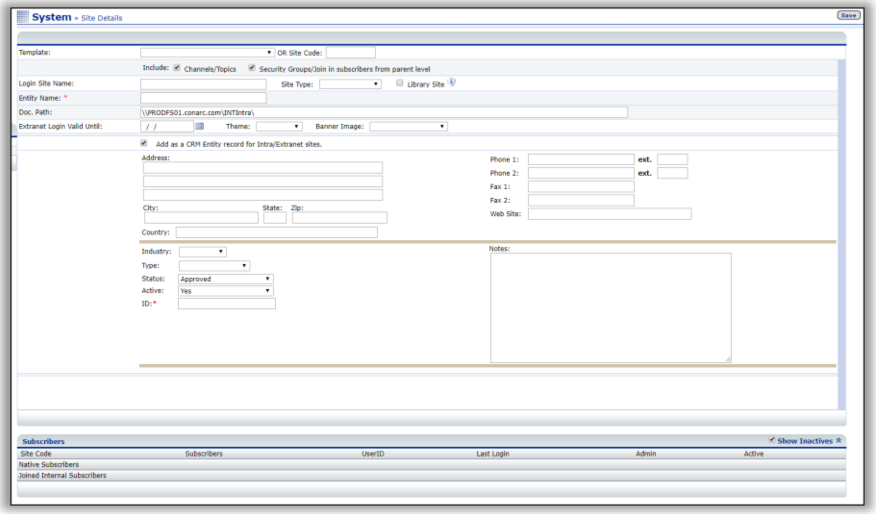


Before adding a new Site, it is recommended that you search for the client name to prevent creating a duplicate site. In addition, your organization might select to import Site's through an interface. Please contact your System IT Administrator before creating a new site.

2

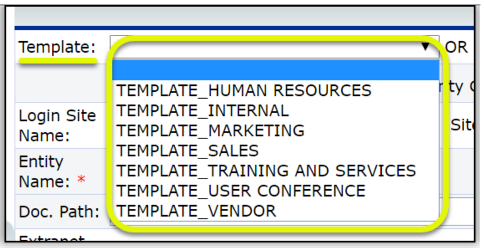
To *create* a new **Site**:

1. *Click* **New Site**. The **System >> Site Details** page will display.



3

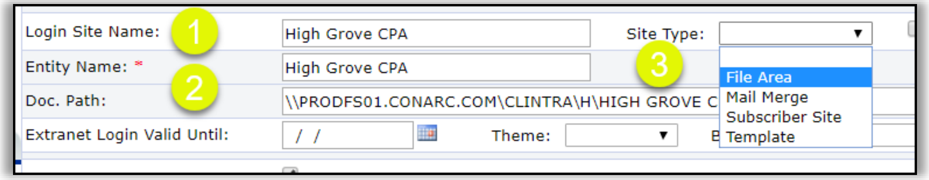
Choose a **Template** from the drop-down list. The list displayed is defined by your System IT Administrator. If a new template is needed, please contact your Administrator.



- Leave the default checkboxes to Include:
  - Channels/Topics
  - Security Group/Join in subscribers from parent level.

4

1. **Login Site Name**: enter a description name for the new Entity; click enter.
2. **Entity Name**: field will auto-populate with the Login Site Name (you can update this field, but it's not necessary).
3. **Site Type**: choose a type from the drop-down list. If the new Entity requires a file area, select the File Area from the list.



5

The Doc. Path: this field will auto-populate with the document path for where the new entity file area document(s) will be stored.

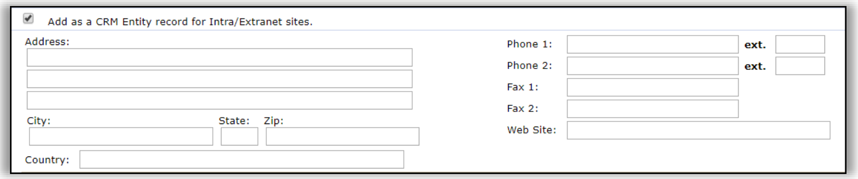
- It's recommended to not update this field without consulting your System IT Administrator.

6

Extranet Login Valid Until: enter a date if you want the portal to automatically expire. This is valuable for prospects otherwise lLeave this field "blank".
Theme: (optional) users can select a theme for the entity.
Banner Image: (optional) users can select a banner theme for the entity.

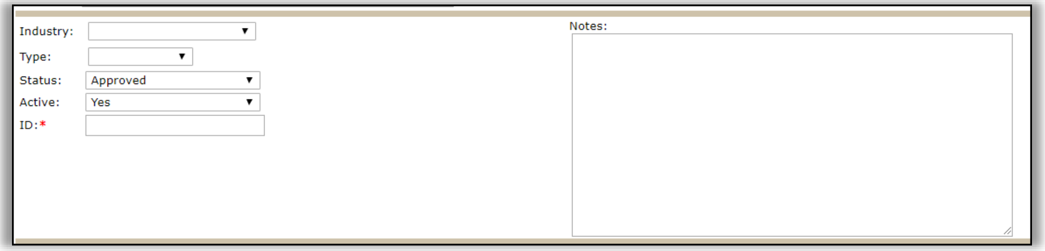
7

Add as a CRM Entity record for Intra/Extranet (Portal) site – leave the checkbox checked as this will save you the steps fore creating a separate client CRM profile and then linking it to the clients Site profile.
Address | City | State | ZIP | Phone | Website | Country – add as much information about the new Entity as possible.



8

Industry – choose from the drop-down list the industry that best identifies the new entity.
Type - choose from the drop-down list the type that best identifites the new entity.
Status – choose from the drop-down list the status that best identifies the new entity.
Active - if the new entity is **Active**, *select* **Yes**. When an Entity is no longer active, *select* **No**.
ID – the ID field is required and is usually the unique identifer for the Entity. Consult with your System IT Administrator to determine the ID.
Notes – (optional) enter additional notes as necessary.

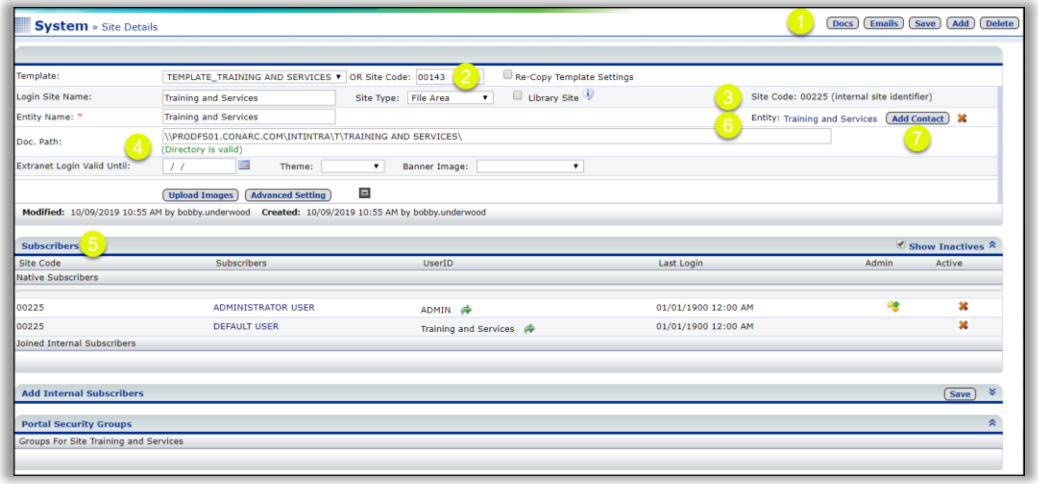


Click **Save**.

9	The new Entity (Site) will be created and the **System >> Site Details** page will display.

A few highlights:

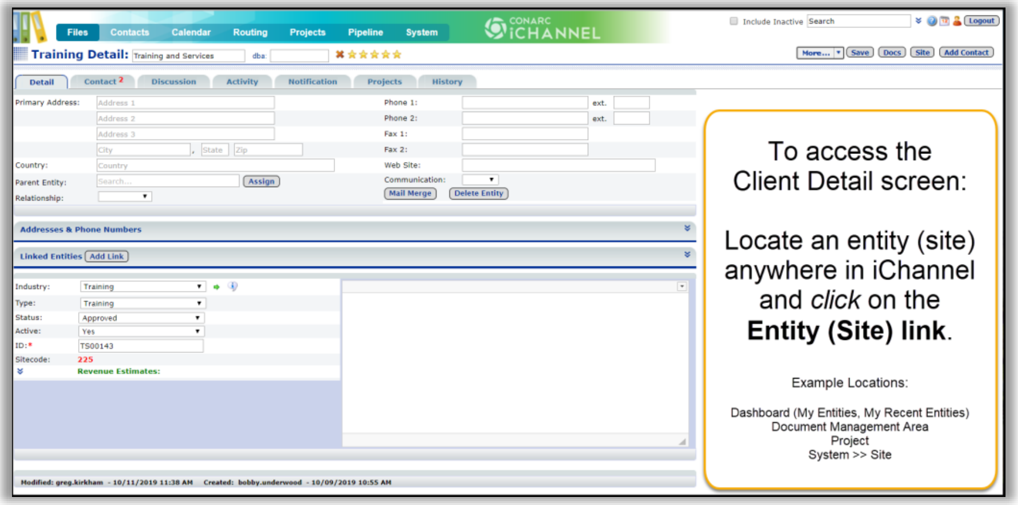
1. **Quick Links**:
    a. **Docs** – click this button to access the Document Management Area
    b. **Emails** – to generate an email from this page, click the Email button
    c. **Save** – to save any updates to the Site Details, click the save button
    d. **Add** – to add a new Entity (Site), click the add button
    e. **Delete** – to permantely delete the Entity (Site), click the delete button
2. **Site Code** will be auto-genarated.
3. **Site Code** (internal site identifer) will be auto-genarated.
4. **(Directory is valid)** will display indicatating that the Doc. Path is active.
5. **Subscribers** – in this section, two (2) Subscirbers will be created.
    a. **ADMINSTRATOR USER** & **DEFAULT USER**
6. **Entity Detail (link)** – click this link to access the Entity Detail Screen (CRM).
7. **Add Contact button** – once an Entity (Site) has been created, if there are contacts associated with the new Entity; you can add contacts from this screen.



CRM: Entity Detail Screen Overview

The Entity Detail Screen provides a quick overview of your entire organization's relationship with the selected entity. Information is organized into tabs for easy access.

- Detail
- Contact
- Discussion Activity
- Notification
- Projects
- History

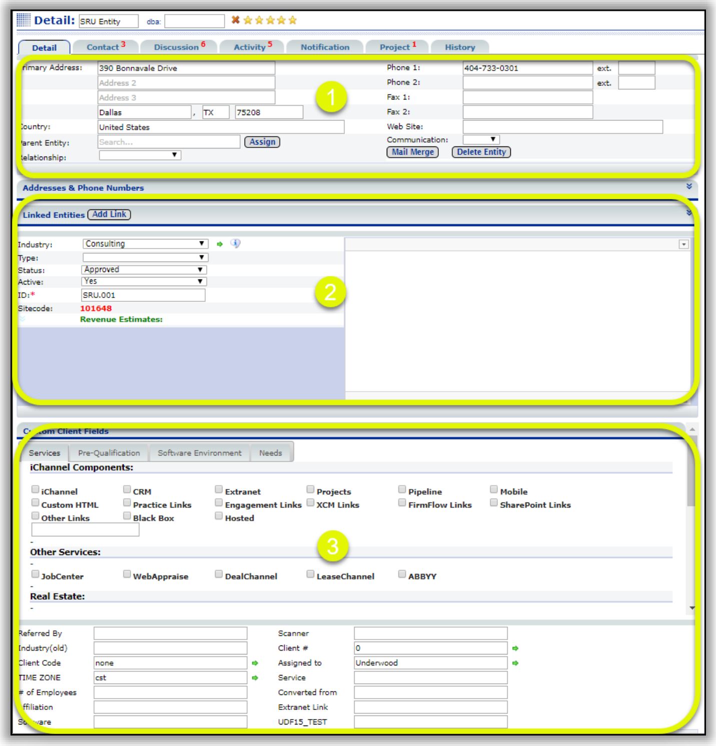


Entity Type – the type of Entity (Client, Prospect, Vendor, etc.) will display before the Entity name.
Entity Name – the display name of the entity that is used for all searches in iChannel. This field will auto-resize to fit the contents.
DBA – "Doing Business As name". If there is a defined DBA name; the user can perform a "search" using the DBA name.
My Entity Stars – allows users to setup **My Entities** on their **Dashboard** to quickly locate and access most often used entities (sites).
Action Buttons are based on your organization's security settings. You may not have access to all or any of these action buttons. Please contact your System IT Administrator if you feel you need access.

- **More** – click the drop-down arrow to access Emails, Add Entity or Activity Report by Entity
- **Save** – saves any updates or modification made to the detail page.
- **Docs** – navigates the user to the Document Management Area for that client.
- **Site** – navigates the user to the Site Details for the entity.
- **Add Contact** – click and you'll be navigated to the Add Contact to add a contact to this entity.

CRM: Detail Tab

CRM – Detail Tab	
Step	**Action**
	By *default*, the **Detail tab** will display. The Detail page is broken down into three main sections: **Client Address Information**, **Linked Entities**, and **Custom Client Fields**.

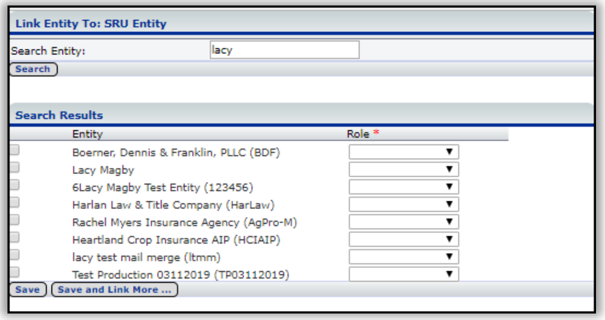


1 CRM – Detail Tab: Client Address Information

- *Enter* the Primary Address, Parent Entity (if necessary, Phone Numbers, Website, as necessary to define the new entity.

2 CRM – Detail Tab: Linked Entities

- If the new entity (site) being created is also Linked to another entity (site), *click* the **Add Link** button.
  - The Link Entity to {Current Entity} window display.
  - Select the entity(s) to link your {current entity} to.
  - *Click* **Save** or **Save and Add More.**



3 CRM – Detail Tab: Custom Client Fields

- These fields are optional, and your Organization will determine the number of custom client fields to support your entity. Each Organization can have up to 150 custom fields.

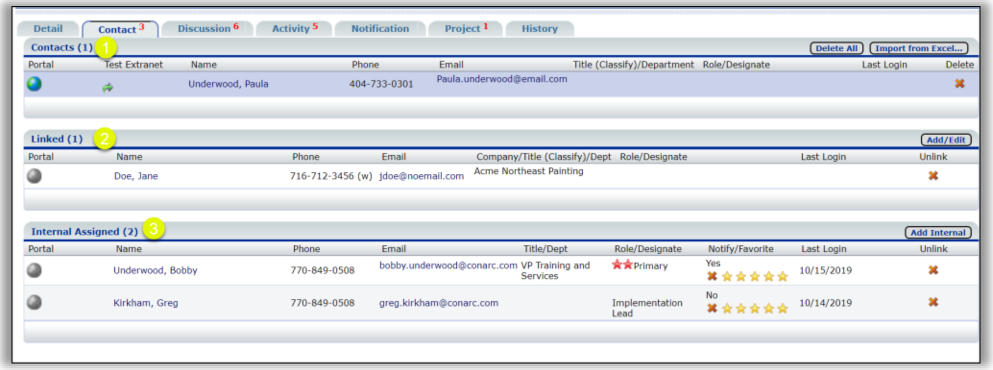
CRM: Contact Tab

CRM – Contact Tab

Step | **Action**

1

The **Contact tab** will display the total number of contacts associated with this entity (site). The Contact 3 tab will display a **red number**, indicating the total number of contacts associated with this entity (site). **NOTE:** All contact entries are also defined as links for quick and easy access to the contact record.



The **Contact** page is divided into *three main areas*:

- **Contact** – all contacts that are associated with the Entity (site). Typically, the external contacts for the entity (site).
    - **Delete All** – *click* this button to delete all contacts. **NOTE:** please contact your System IT Administrator before deleting any contact records.
    - **Import from Excel –** *click* this button to export out a list of all contacts associated with this entity (site).
- **Linked** – this area will display any contacts, vendors, service provides, etc. *that are "linked"* into this entity. These linked contacts are in some ways associated with the main entity (site). To be linked, the contacts must have a primary entity contact record first.
    - **Add/Edit** – *click* this button to add another contact (Linked) to the entity (site). You can also edit any contact that is already linked.
- **Internal Assigned** – these contacts are the internal users (employees) of your organization that are associated with this entity (site, client).
    - **My Entity Stars** – allows users to setup My Contacts on their Dashboard to quickly and easily access often used entities (sites).

Key visual indicators:

- - **Active** globe with a Yellow Plus Sign = Contact with Administrator privileges.
- - **Active** globe indicates has access to iChannel Portal.
- - an **Inactive** globe indicates the contact does not have access iChannel Portal.
- = **Primary Contact** for the Entity (Site).

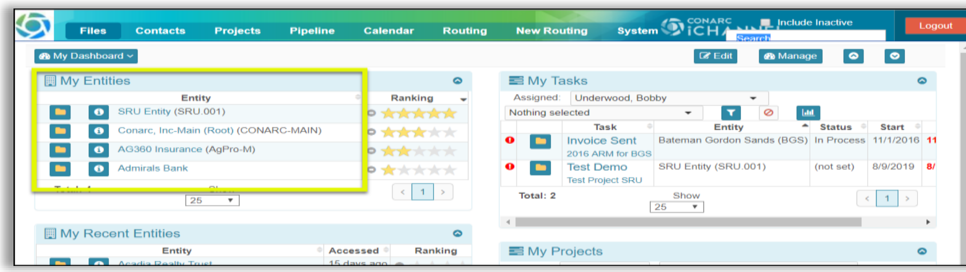
- = *Secondary Contact* for the Entity (Site).
- = if the Contact is Active and created to access the iChannel Portal, the **green arrow** will provide a quick access to the iChannel Portal from iChannel. Great for testing to ensure you have set up the Channel Portal for the user.

CRM: How to Create a Contact

Steps for How to Create a Contact

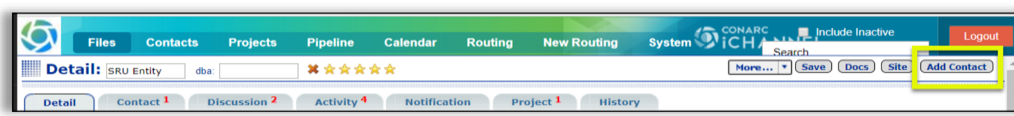
Step	Action
1	From the **Dashboard**, access an Entity, *double-click* the **Entity Name** to access the **Clients CRM** where you would like to *create* the **Contact**.

- To quickly access the entity in iChannel, *click* on the **Entity Name** when you want to go to the iChannel CRM module for that Entity.



Step	Action
2	*Click* **Add Contact**.

- If the **Add Contact** button is *not visible*, please contact your System Administrator to grant permission to add contacts.

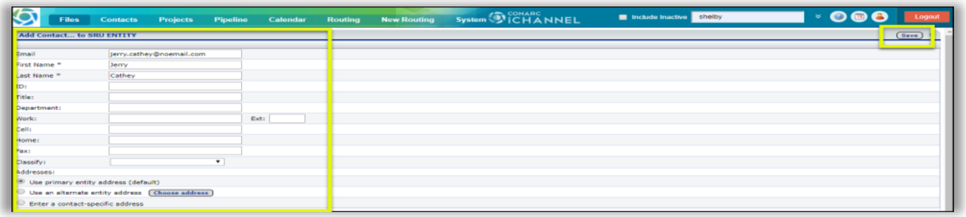


The **Add Contact...[Entity Name...]** window display.

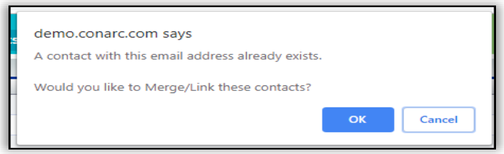
3

Enter the email address for the Contact in the **Email field**.
Enter the contacts first name in the **First Name** field.
Enter the contacts last name in the **Last Name** field**.**

Next, *click* **Tab** to expose the remaining fields; or *click* **Save**.



If the email address is already in iChannel, once the email is entered in the Email field, iChannel will perform a search to verify the email address. If the email address already exists, the below message will display. *Search* for the **Contact** instead.

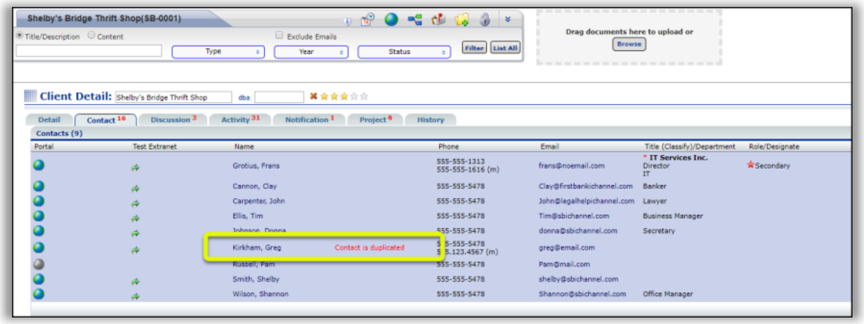


The new Contact is now created in the Entity (Site) and will appear under the Contact tab.

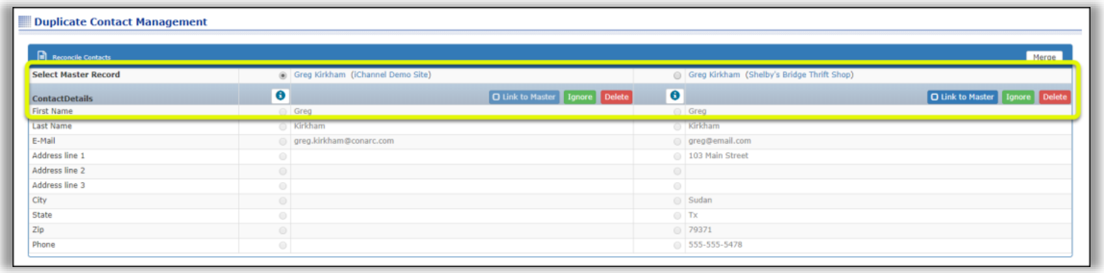
CRM: How to Identify and Resolve a Duplicate Contact

Steps for How to Identify and Resolve a Duplicate Contact

Step	Action
1	When adding a new contact, iChannel validates the new contact information with the following data: • **Email address** • **First Name** • **Last Name** If any of these three triggers another match(es) already in iChannel, you will receive a message stating "**Contact is duplicated**". As a user, you have three options on how to handle the duplicate entry.



2 *Click* the link **Contact is duplicated.** The Duplicate Contact Management window will open.



The User has three options on how to resolve the Contact is duplicated:

1. **Link to Master** – keep the contact under the Master Entity (Site) and links the corresponding entity.
2. **Ignores** – leaves the contact as a duplicate & give the user the option to remove the duplicate notification.
3. **Delete** – Deletes the contact record from the additional entity.

When working with **Contact is duplicate**, please work with your System IT Administrator to resolve.

To Merge the two records, *click* the **Merge** button.

CRM: How to Link a Contact (External or Internal) to an Entity (Site)

Steps for How to Link a Contact (External or Internal) to an Entity (Site)

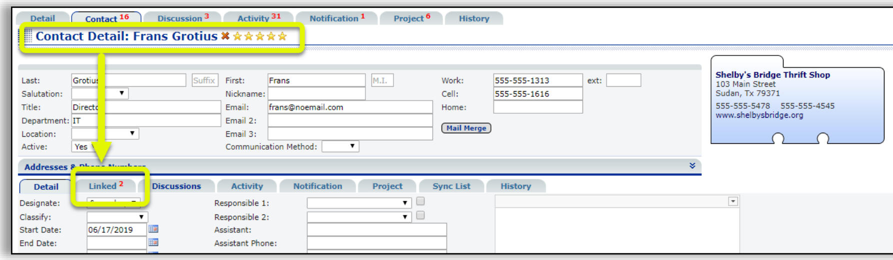
Step | **Action**

1

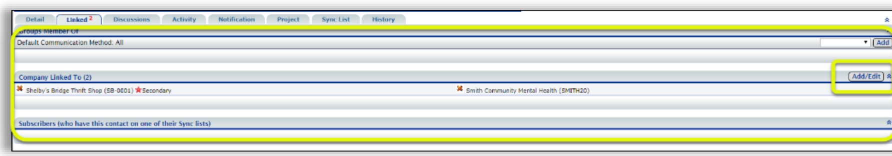
Often a contact will be created in their Primary Entity (Site) yet will have the ability to work for another Entity (Site). In this case, it's recommended to always **Link the Contact to the other Entity (Site)** so not to create a duplicate contact record.

From the **Dashboard**, access an Entity, *double-click* the **Entity Name** to access the **Clients CRM** where you *created* the **Contact**.

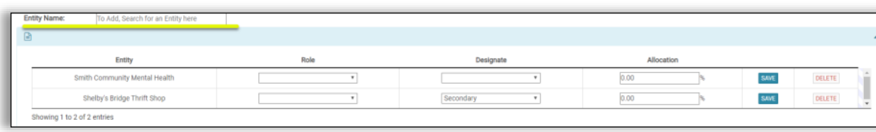
- *Select* a **Contact**. The **Contact Detail** page will display.



- *Click* the **Linked** tab. The Linked area will display.

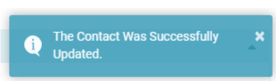


- To link the contact to another Entity (Site), *click* the **Add/Edit** button. The **Entity search** window will display.

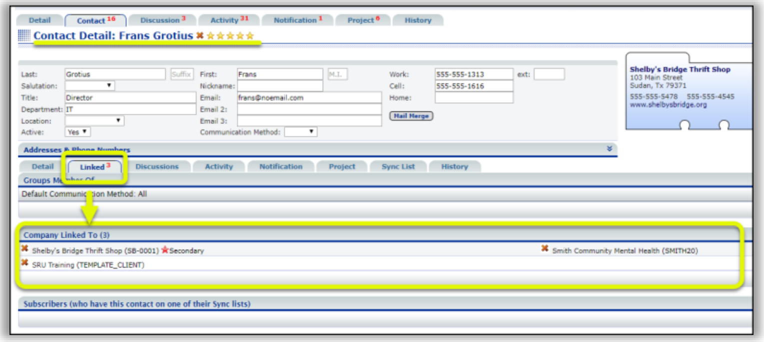


1. **Entity Name**: search field. *Enter* at least **three-characters** to begin the search. iChannel will return all matches, select the match for the linked entity (site).
2. To add the new entity (site) as a linked record for the contact, *click* **Save**.

iChannel will display the following confirmation.



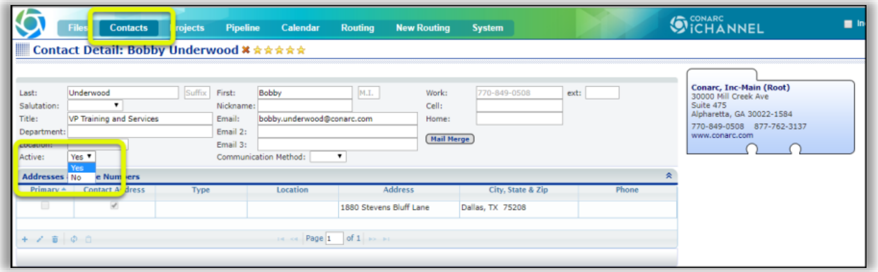
3. The user will be returned to the **Contact Detail** page. *Click* the **Linked** tab to see the newly linked entity(site).



CRM: How to Update a Contact from Active to Inactive

NOTE: It's recommends that any Contact that has been created in iChannel should not be DELETED; yet marked as "Inactive". Therefore, if you need to active the contact record, it record will not have to be created for the beginning.

Steps for Update a Contact from Active to Inactive

Step	Action
1	*Click* the **Contacts** tab from the Main Banner. *Search* for the **Contact** by using the **filter options**. From the Contact Search Result window, click the contact name and link. *Anywhere* in iChannel that you can locate a Contact and access their Contact Detail screen, you can mark a Contact as Inactive.  In the **Active drop-down** list, *select* **No** to mark the Contact as **Inactive**. If your Organization uses an iChannel Import to populate iChannel with Contacts, please contact your System IT Administrator before performing this feature.

CRM: How to Move a Contact

A user might need the ability to move a contact from one Entity (site) to another Entity (site). This might be due to a contact is added to the wrong Entity (Site) by accident. It is also used when a group of prospects contacts are added to a single entity (site). Once there is a need to store documents, the company Entity (Site) is created and the contact is moved. The destination Entity must exist before the move. The ability is controlled by security. In order to move a contact, the user must have RPT access to the Contact/CRM Contact module.

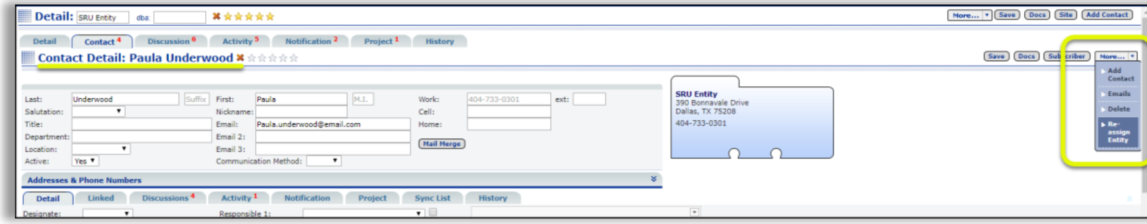
Steps for How to Move a Contact

Step | **Action**

1

Click the **Contacts** tab from the Main Banner. *Search* for the **Contact** by using the **filter options**. From the Contact Search Result window, click the contact name and link.

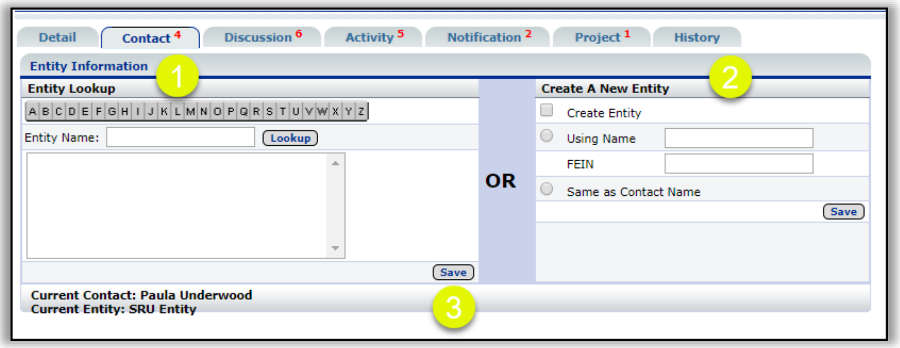
- *Anywhere* in iChannel that you can locate a Contact and access their Contact Detail screen, you can mark a Contact as Inactive.



Once on the **Contact Detail** screen, *click* the **More drop-down** list and *select* **Re-assign Entity**. The **Entity Information** screen displays.

2

1. *Search* for the Entity by using the **Entity Lookup** or perform a search in the Entity Name field, *click* **Lookup**.
2. If the entity (site) is not already created, the user can **Create a New Entity**.
3. *Click* **Save**.

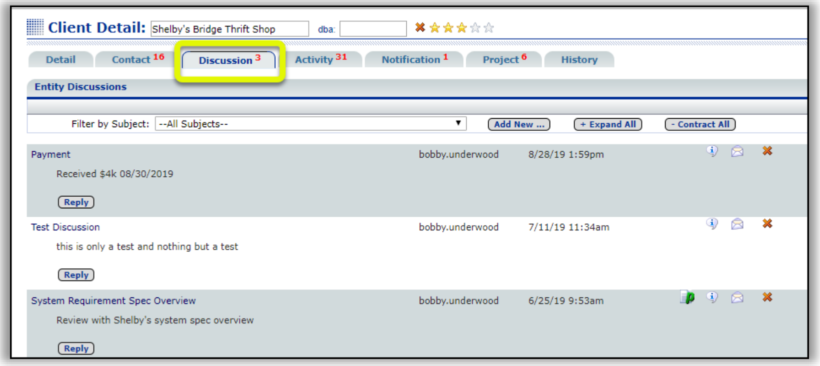


If your Organization uses an iChannel Import to populate iChannel with Contacts, please contact your System IT Administrator before performing this feature.

CRM: Discussion Tab

CRM – Discussion Tab

Step	Action
1	The **Discussion tab** will display the total number of internal discussions. The Discussion tab provides a blog-like area to add and share notes on the Entity (Site) level, the Contact level and the document level. Discussion 3 the red number indicates the number of active discussions.

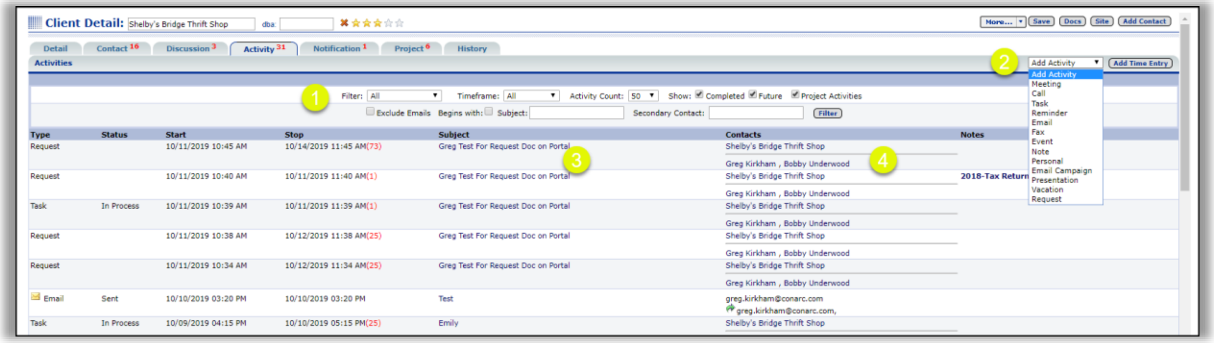


CRM: Activity Tab

CRM – Activity Tab

Step	Action
1	The **Activity tab** will display all activities that have ever been created for this client by any user. Each Activity is linked to the Reminders Calendar, and each participant activity is linked to their corresponding detail information. Activity 31 the **red number** indicates the number of activities associated with the client.

Activities are displayed on the Client Detail screen, the Contact tab, and the Project module. Additionally, activities can be viewed and accessed from the Dashboard (My Activities, My Calendar, and My Projects widgets)

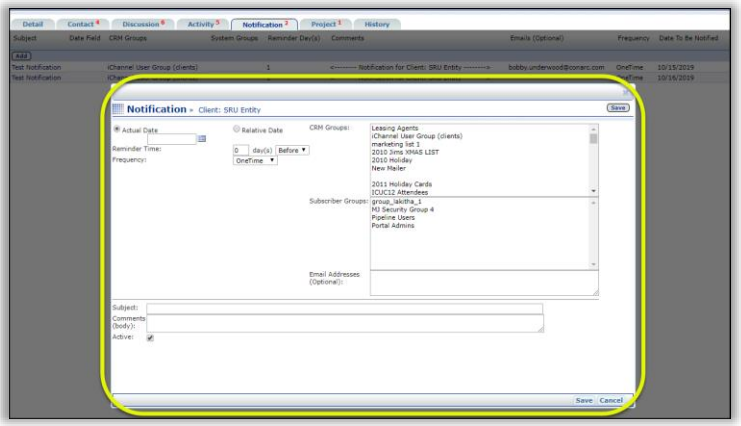


1. **Filter** – use the filter options to narrow the total number of Activities that are displayed.
2. **Add Activity** – this drop-down list gives the user the ability to add additional activities.
3. **Subject Quick Link** – *click* the **Subject link** to access the details of the activity.
4. **Contact Quick Line** – *click* the **Contact link** to access the details of the contact.

Click **Save**.

CRM: Notification Tab

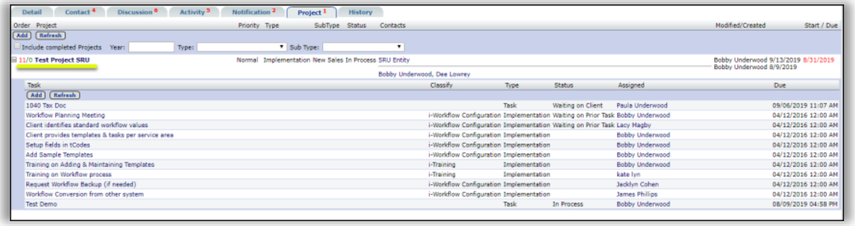
CRM – Notification Tab

Step	Action
1	The **Notification tab** will display all notifications for the entity(site) or for a contact. Notification 2 the **red number** indicates the number(s) of notifications associated with the entity (site) or contact. Notifications allows for the creation of email reminders to be automatically sent to a person or a group. Features include options for the time, frequency and recipient groups or individual for the reminder. **NOTE:** iChannel Notifications simply servers as a group or individual reminder and is not to replace MS Outlook Calendar for meetings, alarms, etc. 

CRM: Project Tab

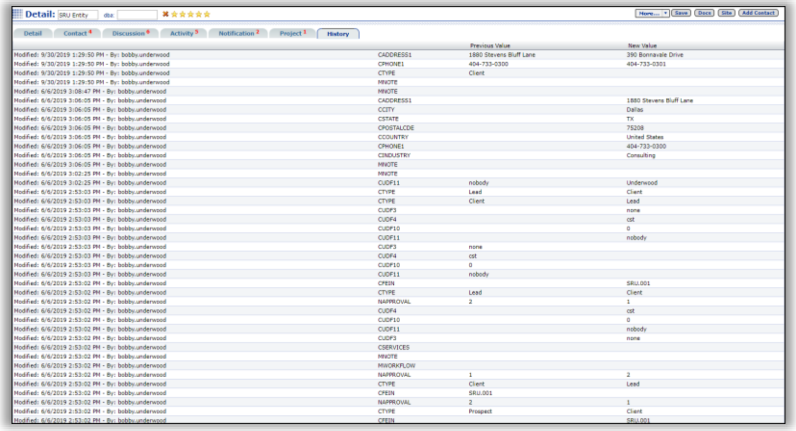
CRM – Project Tab

Step	Action
1	The **Project tab** will display all projects (workflows) associated with the entity (site). Project 1 the **red number** indicates the number of projects (workflows) associated with the entity (site) or contact. From the Project window, a user can view and add a Project (Workflow). Additionally, the user can do a search to narrow down the number of projects (workflows) displayed on the grid. Users can work with an existing project (workflow) by add new Task from the Project (Workflow) page. Users can also click on a Project (Workflow) name link to view the Project Detail Screen. Users can also click on a Task link to view the Activity Detail Screen.



- **Add** – *click* the **Add** button to create a new Project (Workflow).
- **Project Search filters** – *define* the **Year**, **Type** and **Subtype** filters to narrow your search for a project.
- **Project Name** – *click* the **project name link** to open the **Project Details screen**.
- **Task Name** – *click* the **task name link** to open the **Activity Detail screen**.

CRM: History Tab

CRM – History Tab	
Step	**Action**
1	The **History tab** will display all changes made to the Entity (Site) CRM record. Displayed by date, time, user, changes to fields with the previous and new values. 

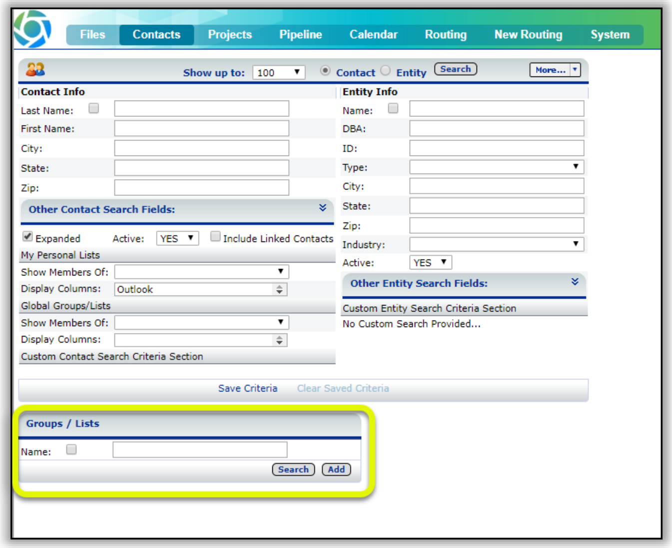
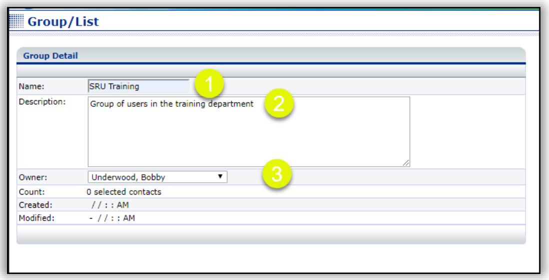
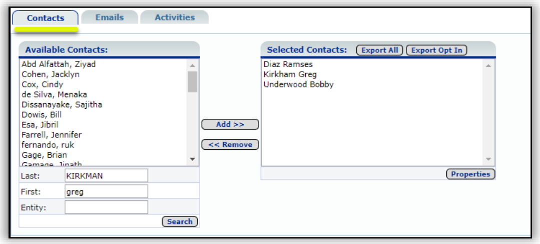
CRM: Groups

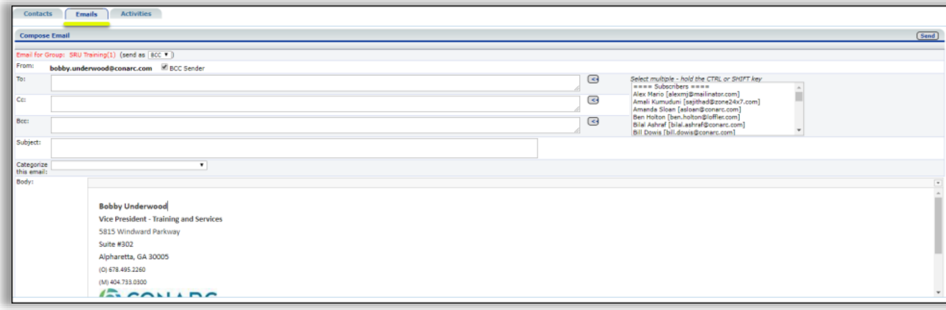
In iChannel, there are two types of CRM Groups/List, Personal and Global.

- **Personal** – Personal Lists are private to each user but can be accessed by your System Administrator. The most common personal list is a list from Outlook. Each user specifies the contacts they want to sync with Outlook. Personal List names are created by iChannel Implementation team and are customizable to your organization. In general, they are called Personal List 1, 2, etc. and the purpose is determined by your users. For example, a salesperson may use Personal List 1 for prospects and a manager may use the same list for the staff.

- **Global** – can be created by your users (with security access) and are accessible to all users in iChannel. Example: list names include Newsletters, Holiday Cards, Support Contacts, Marketing Contacts, etc. These lists are widely used by marketing staff.

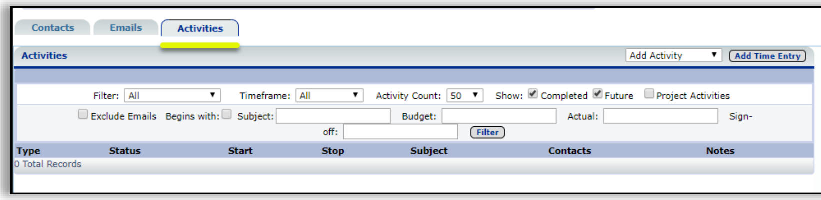
CRM: How to Add a Global Group

CRM – How to Add a Global Group	
Step	**Action**
1	**Groups** are a nice feature when a database becomes so large that filtering does not narrow the search enough. Groups could also be setup for projects needing contact from multiple Entity/Sites. *Click* the **Contacts** tab from the Main Banner. In the **Groups/List** section, *click* **Add.** 
2	1. On the **Group/List** screen, *enter* a **Name** for the Group/List. 2. *Enter* a **Description** (optional) in the description section. 3. **Owner drop-down** list *select* a **user** to be the owner of the group. 4. *Click* **Add.** 
3	**Contacts** tab, *add* all the contacts to the **Selected Contacts** section. Users can also do a search on the Last, First, Entity to quickly locate contacts. 
4	**Emails** tab, allows users to associate the emails with group of users that may expand across multiple Entities (Sites). • *Click* **New Email,** the **Compose Email** screen displays**.** *Compose* an email as normal and *click* **Send**.



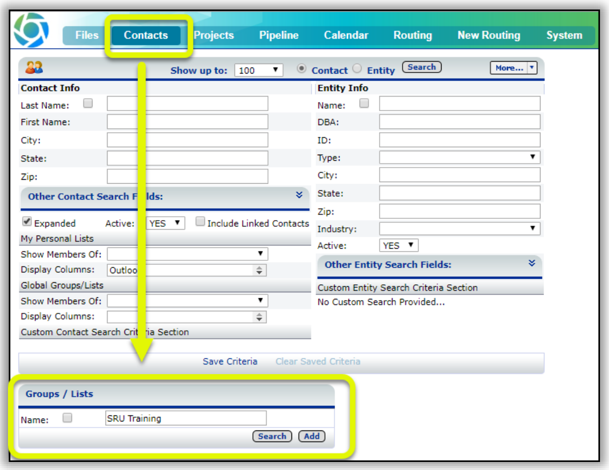
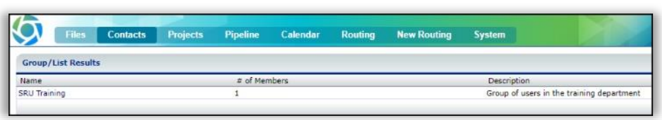
5 **Activities** tab, allows users to create an activity for the group. The activity will display on the Activities tab for the Group and also for each member of the group on their activities widgets or individual tabs.

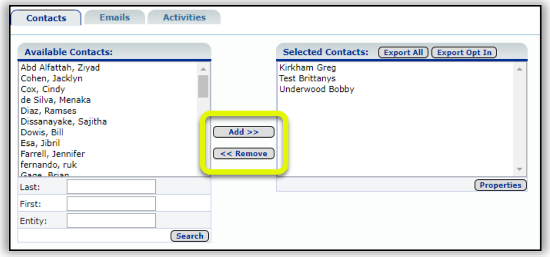
- *Click* the **Add Activity** drop-down to create a new activity.



CRM: How to Add Contacts to Personal List | Global Groups via the Contact Search

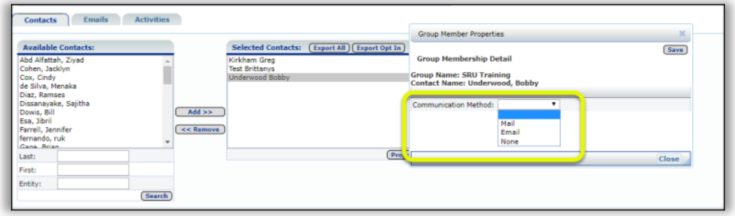
CRM – How to Add Contacts to Personal List | Global Groups via the Contact Search

Step	Action
1	*Click* **Contacts** from the main ribbon. The **Contact | Entity** search screen will display. In the **Groups / List Name** field, *enter* or *search* for the **group / lists** to add the contact. *Click* **Search**.  On the **Group / List Results**, *select* your **Group or List**. 
2	To add additional Contacts to your Group/List, *highlight* contacts in the **Available Contacts** list and *select* Add >>. Hold down the CTRL key to highlight multiple contacts at once.

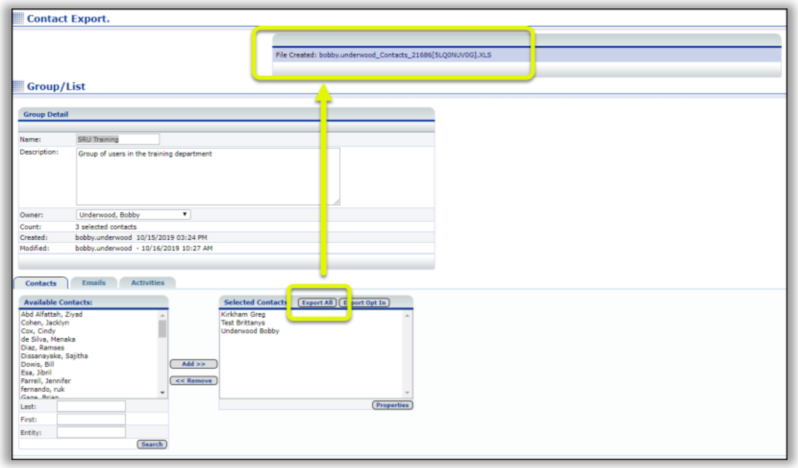


3 To view and set the Communication Method for a contact in the Group/List, *highlight* a **Contact** and *select* the **Properties** button. The **Group Member Properties** window will display.

Select the **Communication Method drop-down** list to *select* a **method**.



4 A User can export the Group/List Contacts by access the Group/List screen. *Select* the **Export All button** in the **Selected Contacts** section.



Module 5: iChannel Workflows

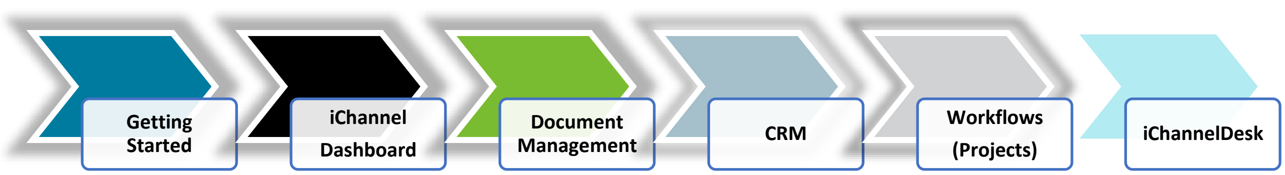
iChannel **Workflows (Projects)** is the execution and automation (iChannel Customization) of business processes; where task, information and documents are passed from one person to another for action according to a set of procedural rules. Workflows involves work by one or more users, and transforms materials, information or services.

By defining workflow, you are creating a sequence of tasks that processes a set of data. Workflows occur across every kind of business and industry. Anytime data is passed between users and/or systems, a workflow is created. Workflows will help an organization to streamline and automate repeatable business tasks, minimizing room for errors and increasing overall efficiency.

> Workflows are highly configurable to meet many different business processes. To learn more about Customized Workflows, please contact your iChannel Implementation Representative

Module Overview

The follow exercise will introduce the building blocks and tools of the **iChannel Workflow**.



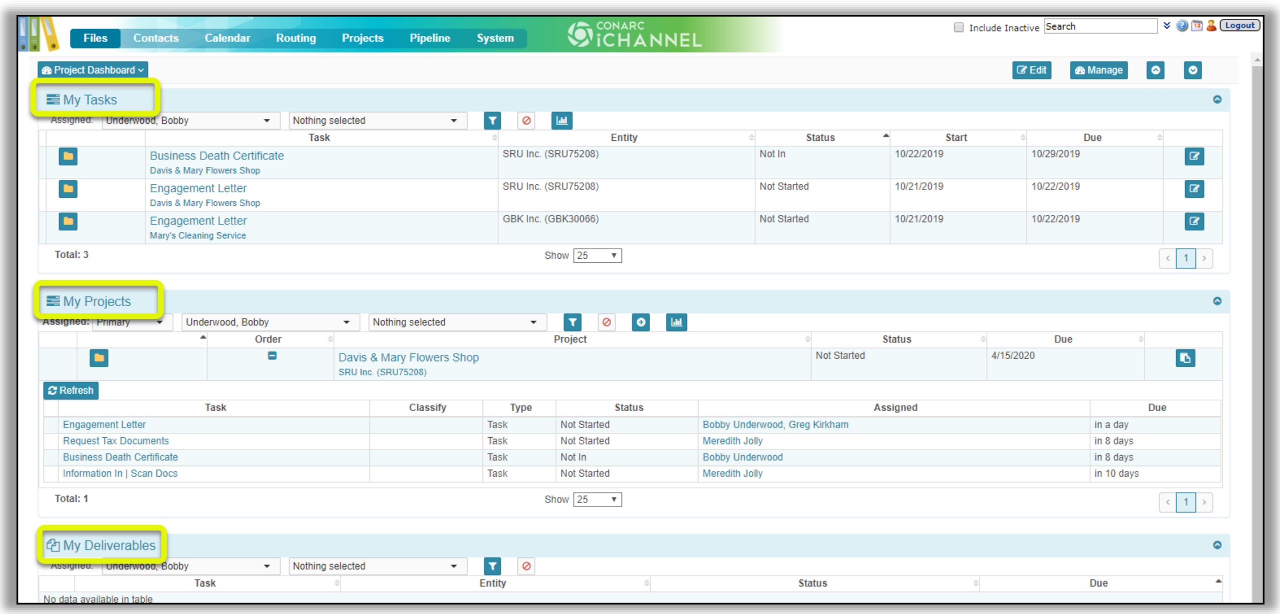
iChannel Dashboard – Workflow Widgets

It's recommended when working with iChannel Workflows, to configure iChannel Dashboard with widgets to have manage your Task, Projects and Deliverables. The below table outlines the widgets related to working with workflows.

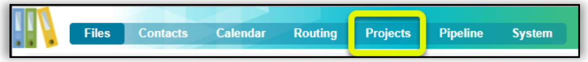
Projects	**My Deliverables**	This widget is for users of the Workflow Module that are using the Custom Deliverable grid. Displays the Deliverables and due dates for the Projects you are assigned to. Each Deliverable will be associated to a status to show their progress. **RED** – overdue. **YELLOW** – on-hold. **GREEN** – in-progress.
	My Projects	My Projects (Workflows) display all the workflows where the user is listed as the "primary" contact person. Tasks are listed by the order number. Viewable information includes the project name, due date and any assigned Workflows. Sites listed for the workflow are also displayed in the widget. Each Workflow will be associated to a status to show their progress. **RED** – overdue. **YELLOW** – on-hold. **GREEN** – in-progress.
	My Tasks	Display a user's designated tasks that have not been completed. Clicking on the checkmark icon (far right) will mark the task as "Complete". Use the Assigned drop-down list to see other users assigned Tasks, Sites listed within the widget.

To learn more about how to Customize your dashboard with workflow widgets, please click the following link:

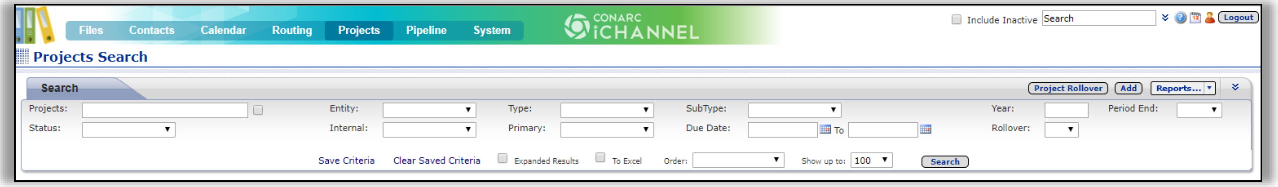
- [iChannel Dashboard – Customize Your Dashboard Layout]

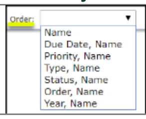
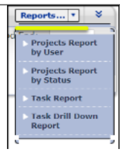


iChannel Workflow Search Screen

From the **Main Banner**, *click* 

. The **Project Search** screen *will display*. From the Project Search screen users can search for projects and task by identifying advanced search options in any of the fields.



Project Search Fields	**Project**	This field allows a user to *search* for a **Workflow (Project) by name**. Use the checkbox to add the additional search for **Begins with..** to the search for names that begin with your search criteria.
	Status	*Click* the **Status drop-down arrow** to select a status search criteria. This field is highly customizable; please contact your System IT Administrator to learn more.
	Entity	*Click* the **Entity drop-down arrow** to select an entity. *Hold down* the **Shift** or **ctrl** keys to select multiple entities. To *search for all entities*, leave the field **blank**.
	Internal	Click the **Internal drop-down arrow** to search for a list of contacts for the projects. *Hold down* the **Shift** or **ctrl** keys to select multiple contacts. To *search for all internal contacts,* leave the field **blank**.
	Type	*Click* the **Type drop-down arrow** to select a type search criteria. This field is highly customizable; please contact your System IT Administrator to learn more.
	Primary	*Click* the **Primary drop-down arrow** to select a contact identified as a primary contact for a Workflow.
	Sub Type	*Click* the **SubType drop-down arrow** to select a subtype search criteria. This field is highly customizable; please contact your System IT Administrator to learn more.
	Due Date **End Date**	To search for workflows between a **Due Date** range, *click* the **date-pickers** to set dates.
	Year	To search for workflows for a particular **Year**, *enter* a **four-digit (XXXX) year**.
	Period End	To search for a workflow for a particular **Period End**, *click* the **drop-down list** and *select* a period.
	Rollover	To search for a workflow by **Rollover**, *click* the **drop-down list** and *select* either **Yes** or **No**.
	Save Criteria **Clear Saved Criteria**	*Click* the **Save Criteria** button to save the project search fields entries for future searches. This is useful when repeatedly searching for the same type of project or doing repetitive searches *Click* the **Clear Saved Criteria** to clear any saved search criteria.
	Expanded Results	*Check* **Expanded Results** to *show* **Notes** in your Project Search.
	To Excel	*Check* **To Excel** to create a spreadsheet from your Project Search.
	Order	*Click* the **Order drop-down** list to *select* 
	Show up to	*Click* the **Show up to drop-down** list to select the number of results to show in the Project Search results.
	Reports	*Click* the **Reports drop-down** list to select a Project Report to generate. 

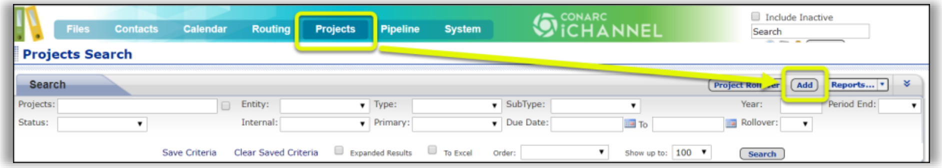
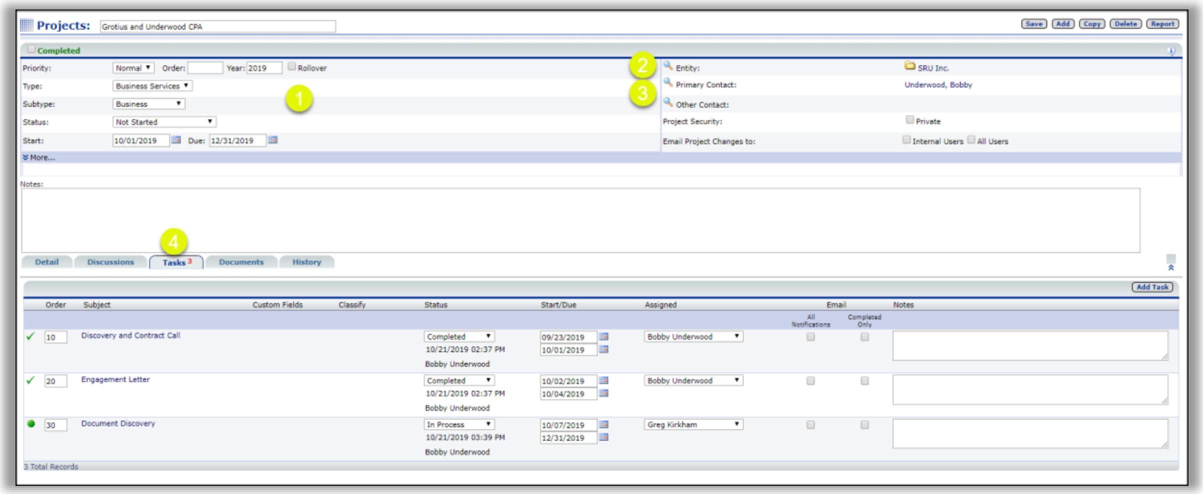
Workflow: How to Add a New Workflow (Project)

There are *four basic steps* when creating a new **Workflow (Project)**:

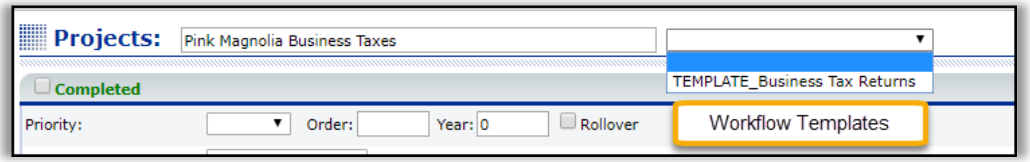
1. **Create a Workflow** (1-time workflow vs. pre-defined workflow templates)
2. **Assign to a Site (Entity)**
3. **Assign Contacts**
4. **Identify and Assign Task(s) to Contacts**

> Please contact your System IT Administrator or iChannel Implementation Representative to learn more about "**working with Workflow TEMPLATES_**"

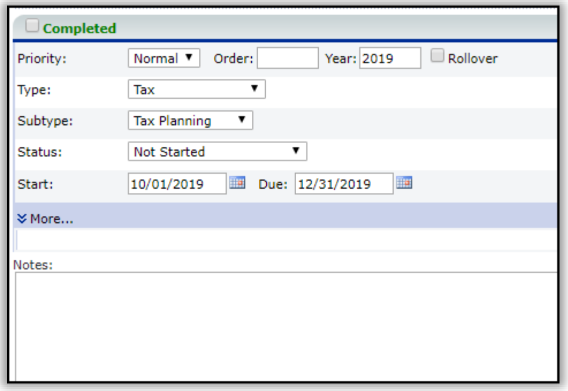
Workflows – How to Create a Workflow

Step	Action
Projects:	*Select* **Projects** from the **Main banner**. The *Project Search window displays*. *Click* **Add**.  The **Projects** screen will display. 
1	**Create a Workflow** (1-time workflow vs. pre-defined workflow templates). • **Workflow (Project name)** – in the Project name field, *enter* a descriptive **Workflow (Project) Name** to identify the workflow (project).

- If creating a new Workflow (Project) using a **Pre-defined Workflow (Project) TEMPLATE_**, *select* the **drop-down arrow** and *select* a "**TEMPLATE_**" from the list.
  - **NOTE:** to use a pre-defined workflow "TEMPLATE_", the template must have been created in advance.
  - **NOTE:** All predefined templates must start with: "**Template_**XXXXXX".



Workflow (Project) Details

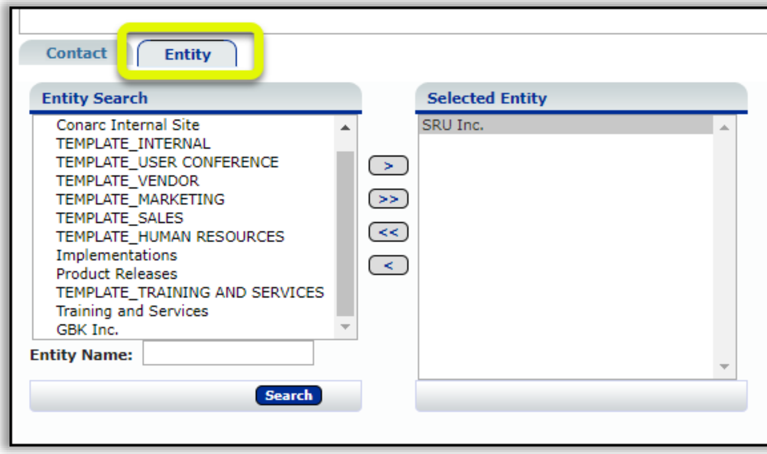


- **Priority** – Assign the priority level by clicking the drop-down arrow.
- **Order** – field allows you to define a display order for the workflow (project) on your dashboard.
- **Year** – field allows the user to define the year for the workflow (project). (i.e. 2018, 2019)
- **Type** – assign the type identifier for the workflow (project).
- **Subtype** – assign the subtype identifier for the workflow (project).
- **Status** – assign the current status the workflow (project). (i.e. Not Started, In Progress, Completed).
- **Start | Due** – assign the start date and due date for the workflow (project).
- **Notes (optional)** – enter notes related to the workflow (project)

2

Click the **Entity tab** or *click* Entity: to begin a search for a Site (Entity) to assign to the workflow. To *view* all available entities in the **Entity Search** results, *click* the **Search button**.

Double-click the **Site (Entity)** or use the **quick action buttons** > >> << < to *add* or *remove* Sites (Entities) to the **Selected Entity** area.

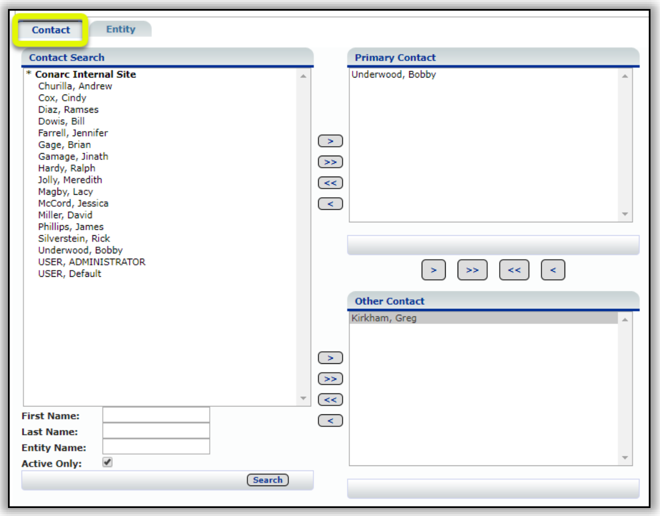


3 *Click* the **Contact tab** or *click* Primary Contact: to begin a search for a contact(s) to assign contact(s) to the new workflow.

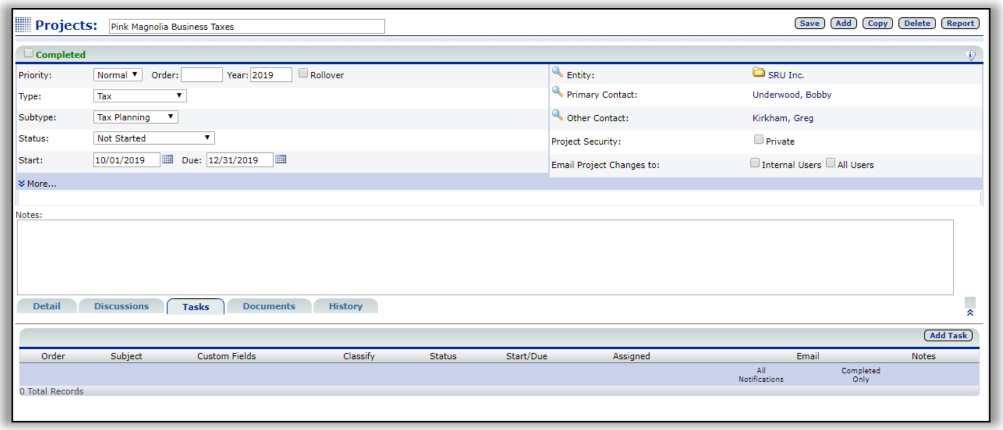
Available Contacts will display in the **Contact Search** area. To perform a detailed search for a contact, *enter* **specific values** in the: **First Name, Last Name, Entity Name or Active Only**.

Users can add additional contacts to the workflow (project) by selecting contact(s) and adding to the **Other Contact** area.

Double-click the **Contact(s)** or use the **quick action buttons** to *add* or *remove* Contact(s) to the **Primary Contact or Other Contact** area.



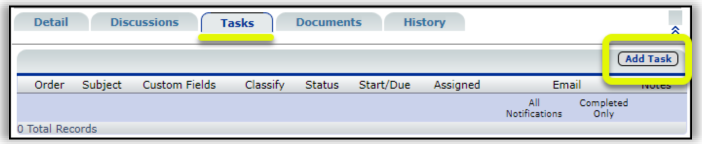
Before **Identifying and Assigning Task(s)** to the Workflow (Project), **Save the Project**.



The final step in creating a new Workflow (Projects) is to **Identify** and **Assign Task(s)** to the Workflow (Projects) | Contact(s).

4

Click the **Tasks** tab, *click* **Add Task**.



The **Activity** window will display.

- **Name** – *enter* the **Name** of the Workflow (Project) Activity.
- **Type** – *by default*, **Task** will populate in the **Type** field.
- **(Optional) Class** – *select*, if applicable, a **Class** type from the drop-down list.
- **Status** – click the drop-down arrow to defined the status.
- **Start | End Date** – *select* the **Date Icon** to enter the start date and end date for the requested Activity. If the activity is all-day event, *select* the **All Day Event checkbox**.
- **Project** – *by default*, the name of the Workflow (Project) will display. If the project needs to be assigned to a different Site (Entity), click the drop-down arrow and select.
- **Projects Order** – this field determines the order for the Task(s) in your workflow (project).
  - **NOTE:** it's recommended to order your Task(s): 10, 20, 30, etc. This allows the user to add "new task" when needed.
  - **NOTE:** if the Projects Order is not defined, the Task will default to "999"

- **Entity** – *click* in the **Search** field and locate the Site (Entity) to assign the Task.
- **(Optional) Priority** – this optional field can be: **Blank**, **High**, **Medium**, or **Low**.
- **(Optional) Note** – enter any notes that are related to the Task.
- **Contacts** –
  - *Highlight* a contact from the pre-populated contact list, *click* **Add Selected**
  - *Highlight* a contact from the removed selected section, *click* **Remove Selected**

Tool Tip:

Double-click a Contact to **Add** a contact   *Double-click* to **Remove** a contact from the Remove Selected section

To *select multiple* **Contacts**, hold down the **Ctrl key** and *select* **Contacts**

Click Save. *Repeat* **Step 4** until all the Task(s) associated with the Workflow (Project) have been defined.

Tool Tip:

All Notifications – if you are listed as a *Primary Contact* or *Secondary Contact* on a Workflow Project and **All Notifications** is checked. The contact(s) will receive notification when there is "*any*" change made to the Task. (I.e., Status, Assigned, etc.)

Completed Only – if you are listed as a *Primary Contact* or *Secondary Contact* on a Workflow Project and **Completed Only** is checked. The contact(s) will "*only*" receive notification when the Status for the Task is set to "Completed".

Module 6: iChannelDesk

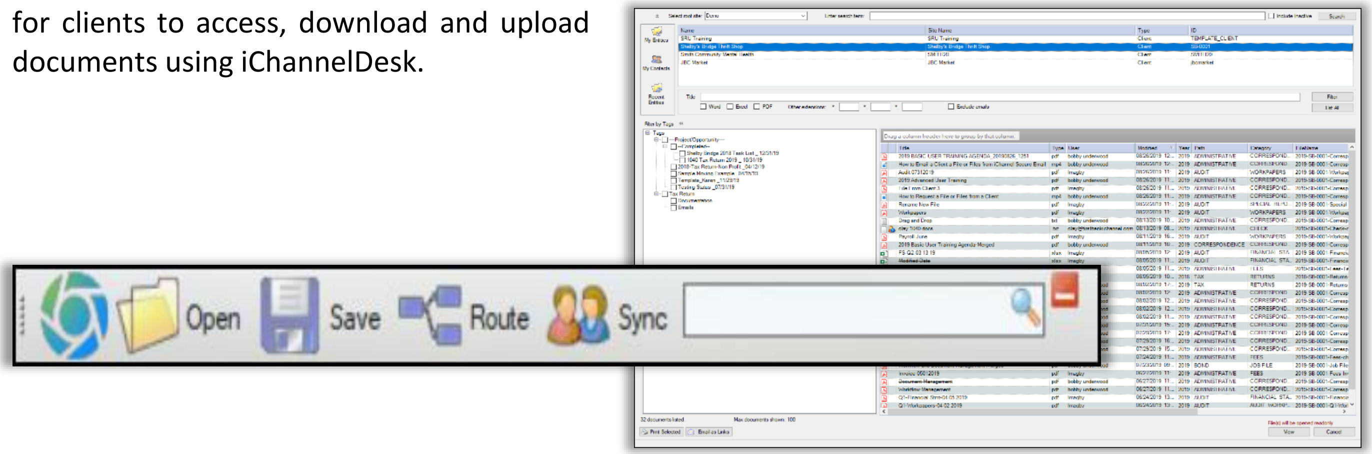
Welcome to iChannelDesk End User Training

iChannelDesk is an application that enables users to quickly perform frequent activities (task) from their desktop. iChannelDesk allows users to:

- Open iChannel document(s)
- Save email(s) directly from Outlook (or any email system) directly into iChannel
- Save document(s) directly to iChannel
- Route document(s) directly to iChannel
- Save document(s) directly to IChannelDesk Monitor Folder (Pending Files)
- Sync Outlook Contacts into iChannel

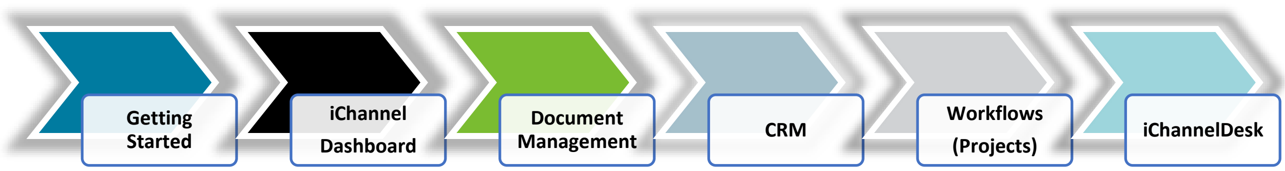
Contact your IT System Administrator if you currently do not have iChannelDesk installed on your workstation.

This guide will provide *step-by-step actions* for clients to access, download and upload documents using iChannelDesk.



Module Overview

The follow exercise will introduce the building blocks and tools of the **iChannelDesk**.

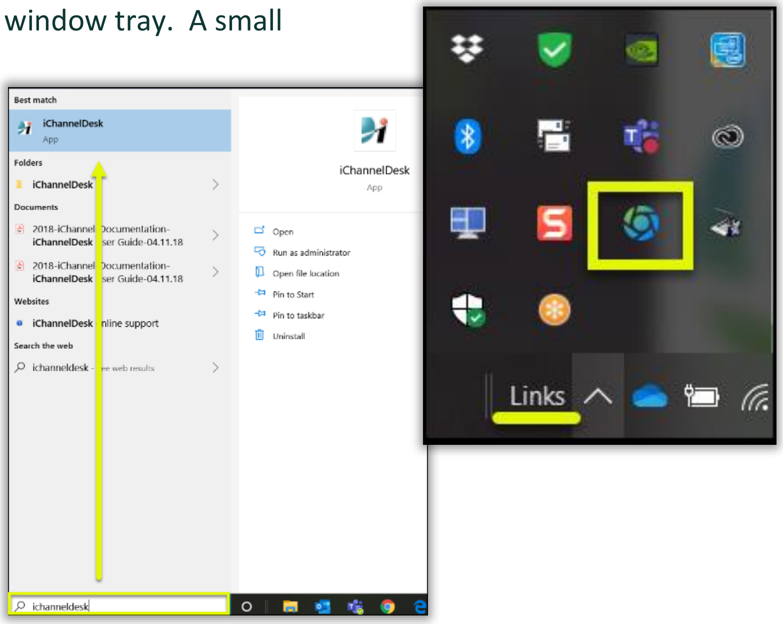


How to Access and Start iChannelDesk

Steps for How to Access and Start iChannelDesk

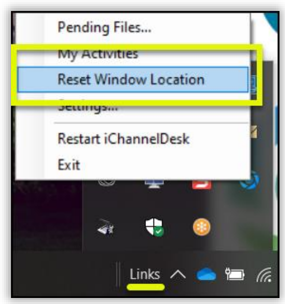
Step	Action
1	*Click* on the **Links ᐱ** icon in your system window tray. A small application window will display; *double-click* the **iChannelDesk** icon.

- You can also *search* for iChannelDesk App using the **Windows Search** feature.



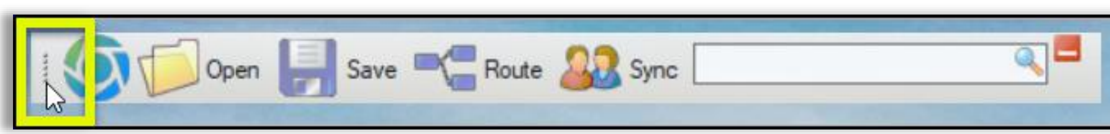
To *start* **iChannelDesk**, *double-click* the **iChannelDesk** icon. The iChannelDesk Toolbar will display.

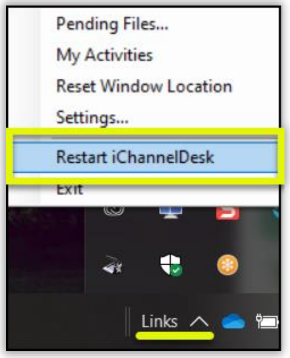
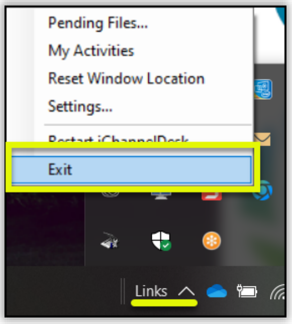
If you use multiple monitors, your iChannelDesk Toolbar might appear on a different monitor. To locate you iChannelDesk Toolbar, *access* the **Links ᐱ** icon from the **Windows System Tray**, *right-click* the **iChannelDesk icon**, *select* **Reset Window Location**.



Step	Action
2	To *move* the **iChannelDesk Toolbar** to a different location on your window:

- *Locate* the **gripper bar** on the *left-side* of the iChannelDesk Toolbar window; *click* and *drag* to a location on your desktop.



3	To *re-start* iChannelDesk, *access* the **Links Λ** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Restart iChannelDesk**.	
4	To **exit** iChannelDesk, *access* the **Links Λ** icon from the **Windows System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Exit**.	

How to Customize iChannelDesk Toolbar

iChannelDesk Toolbar is easily customizable by each user and is unique to each user via the **Settings** feature. A few features that users can customize are:

- User ID (or your Subscriber ID) and Password
- Search Results – document(s) to show
- Path to users Monitored Directory and Routing Queue UNC Path (IT System Administrator only)
- Appearance and Other Settings
- Sync feature (Contacts, Calendar/Tasks, Emails)
- Auto-Sync

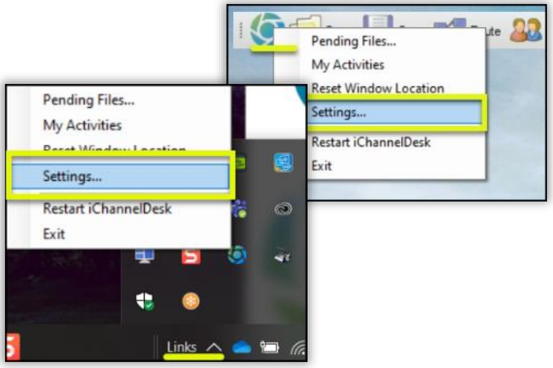
Steps for How to Customize iChannelDesk Toolbar	
Step	**Action**

1

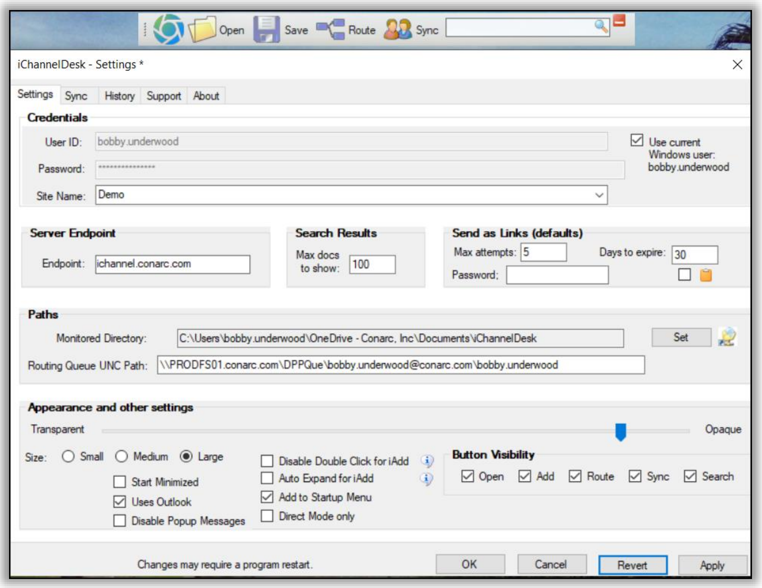
To *access* **iChannelDesk Settings**:

- *Right-click* the **iChannelDesk icon** from the toolbar.

- *Access* the **Links** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Restart iChannelDesk**.



The **IChannelDesk – Settings** window displays.



Changes made to any iChannelDesk Setting may require a program restart.

2

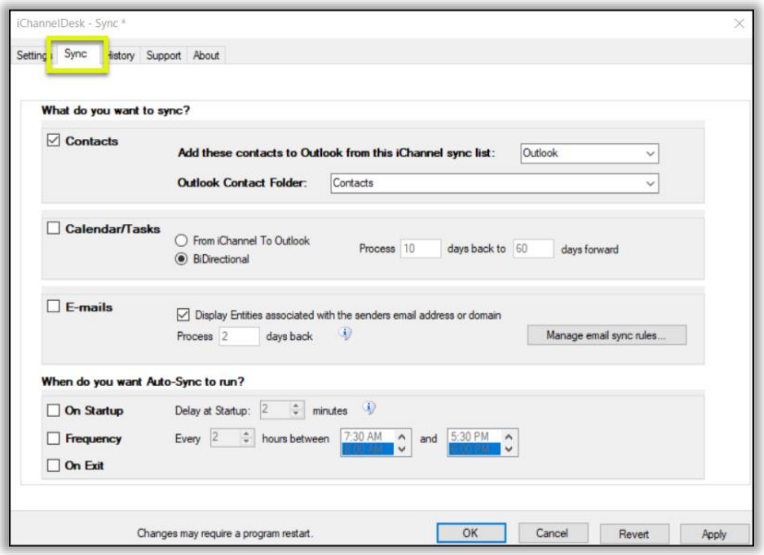
A few common **iChannelDesk settings** to consider:

- **Settings Tab - Appearance and Other Settings**
  1. **Transparent | Opaque** – *slide* the **blue slider** to determine how much **transparency** or **opaque** you would like the Toolbar to appear.
  2. **Size** – the icons displayed on the iChannelDesk Toolbar can be customized to appear

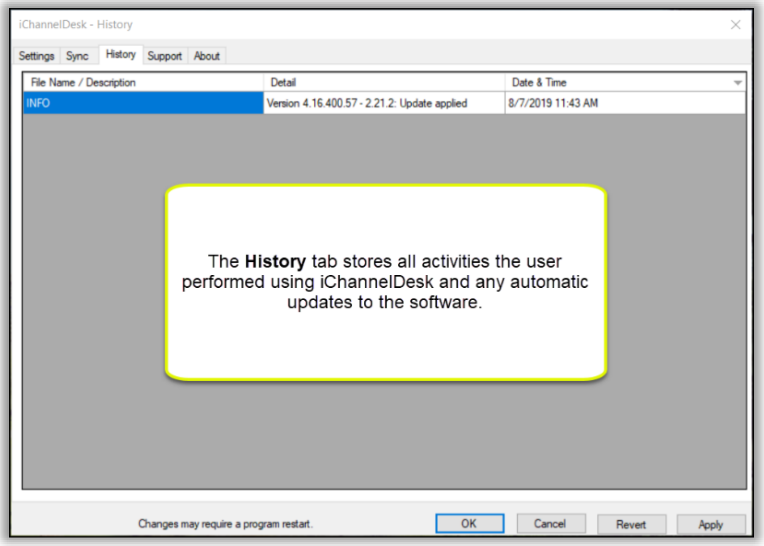
Small, **Medium**, or **Large**.

3. **Button Visibility** – to customize what icons appear on the iChannelDesk Toolbar, *select* the **checkbox next to each option**.
    - **Additional Settings:**
        - Start Minimized
        - Uses Outlook
        - Disable Popup Messages
        - Disable Double Click for Add
        - Auto Expand for Add
        - Direct Mode only

- **Sync Tab**
    - Users can define how often to sync items in iChannelDesk
        - Contacts
        - Calendar/Tasks
        - Emails
        - Auto-Sync to run
            - On Startup | Frequency | On Exit



- **History Tab -** To view the History of activities performed in iChannelDesk, *select* the **History** tab

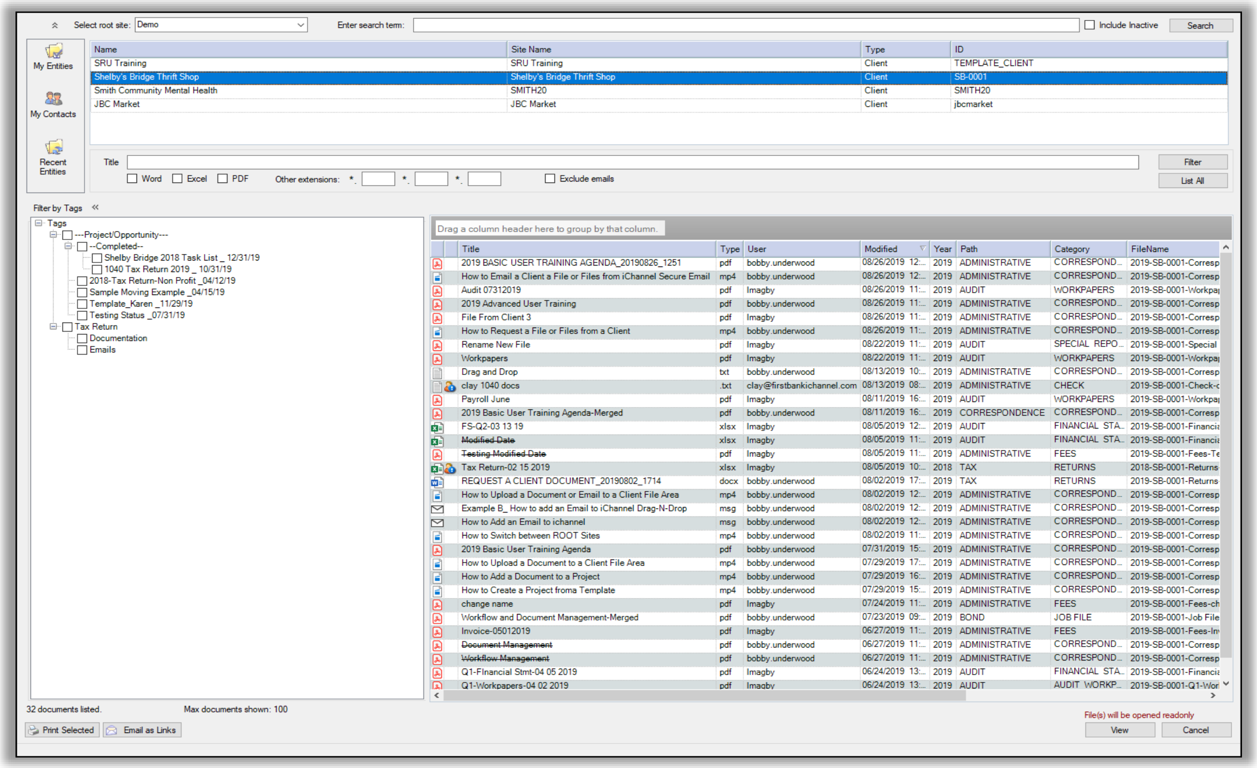


iChannelDesk – Main File Area

iChannelDesk main end-user window provides the user with the same functionality to perform several tasks like using the iChannel Client File Area.

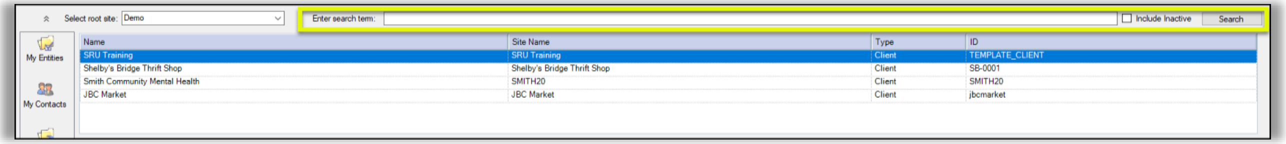
- Search for Entities
- View My Entities, My Contacts, My Recent Entities
- View and Search for Client Document(s)
- Filter by Tags, Projects (Workflows)
- Drag-and-Drop Documents and Emails directly into iChannelDesk
- Print and Email Links directly from iChannelDesk

How to Search for an Entity



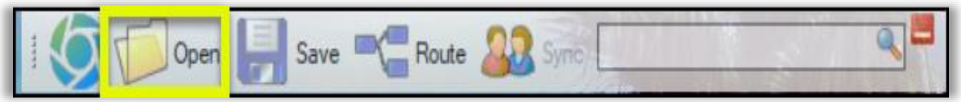
Steps for How to Search for Entities or Contacts

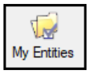
Step	Action
1	From the **iChannelDesk Toolbar**, *click* the **folder icon**.  In the **Enter Search Term** field, *enter* "at least" the letters for the Entity you are searching. • By default, the entities that you have permission to view, will display in the Entity section.

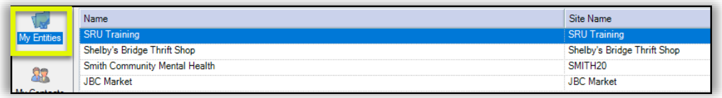


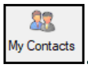
How to View My Entities, My Contacts, My Recent Entities

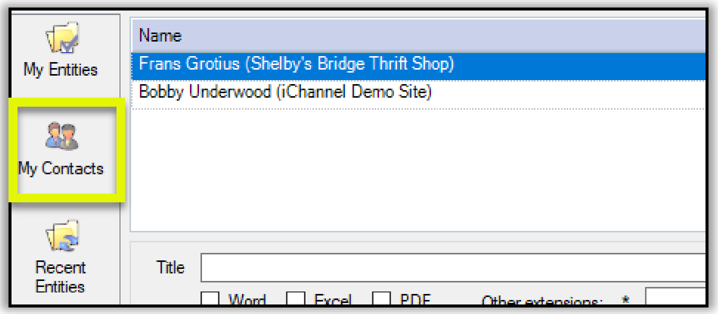
Steps for How to View Entities, My Contacts, My Recent Entities	
Step	**Action**
1	From the **iChannelDesk Toolbar**, *click* the **folder icon**.

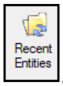


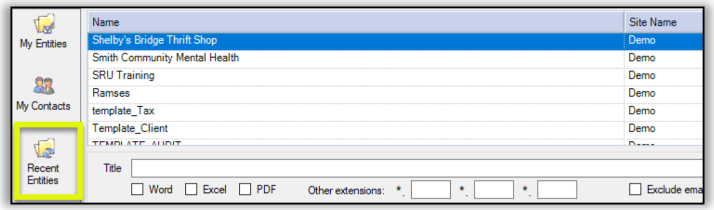
To view **My Entities,** *click* .



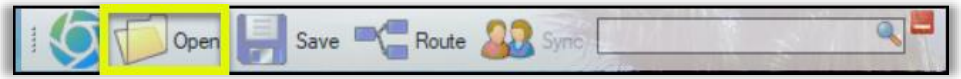
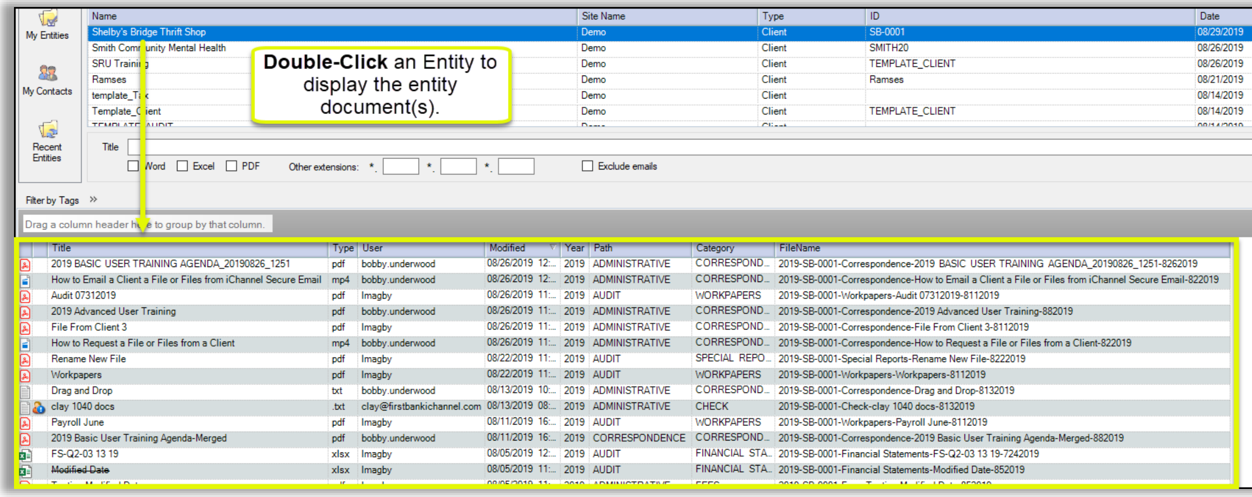
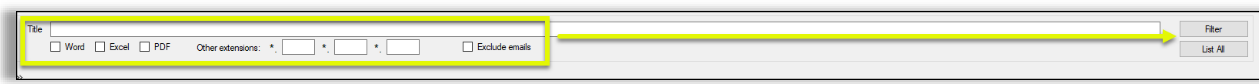
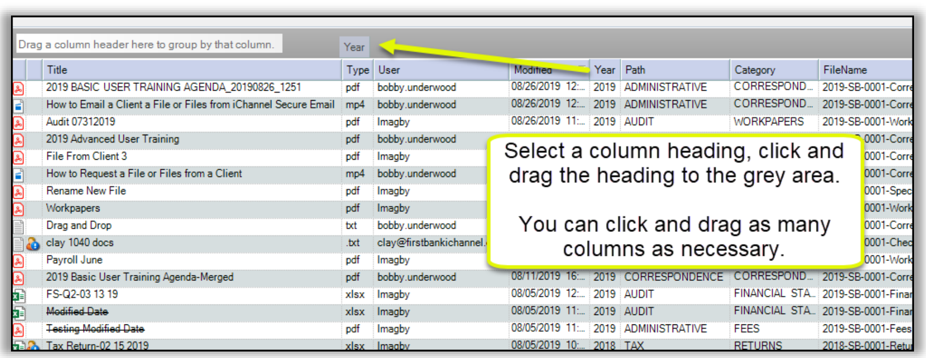
To view **My Contacts**, *click* .



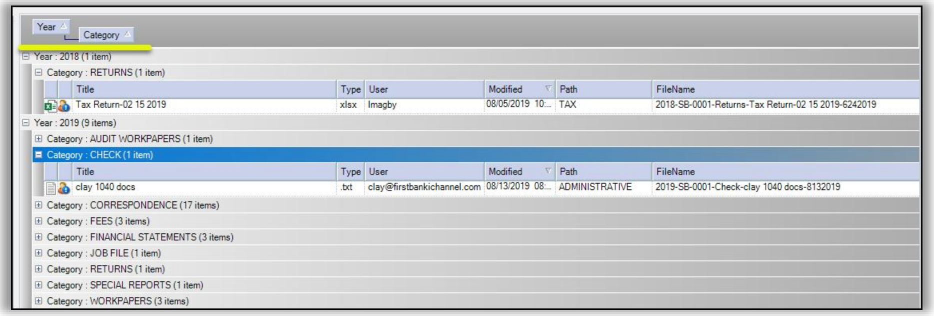
To view **Recent Entities**, *click* .



How to View and Search for Client Document(s)

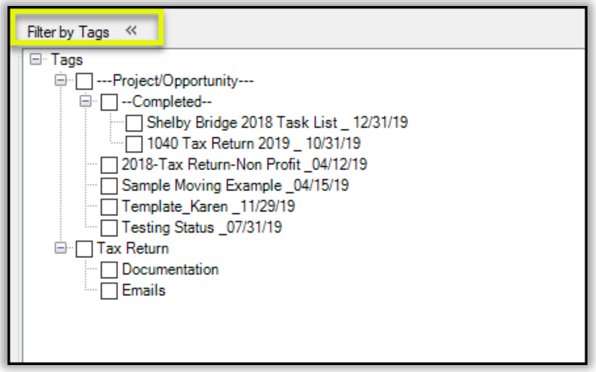
Steps for How View and Search for Client Document(s)	
Step	**Action**
1	From the **iChannelDesk Toolbar**, *click* the **folder icon**.  *Double-click* an **Entity** from the available list of entities. The Entities document(s) will display in the File Area. 
2	To narrow your search for a document(s), use the document **Filter** features; *select* Filter to display the results.  • To return all your document(s) for an entity, *select* List All..
3	To search for document(s) based off a **Filter: Column Headings**: • *Select* a column heading, *click-and-drag* the **column header** to the grey bar area. 

- To add *additional Column headings* to the ***filter***, *repeat* the **click-and-drag steps** listed above.



- To *view* a **document**, *double-click* a **document** in the **File Area**.
- To clear Filters: Column Headings, *select* List All.

4 To search for a document(s) associated by **Tags** and/or a **Project (Workflow)**, *select* all necessary **Tags** or **Project checkboxes** in the **Filter by Tags** section.

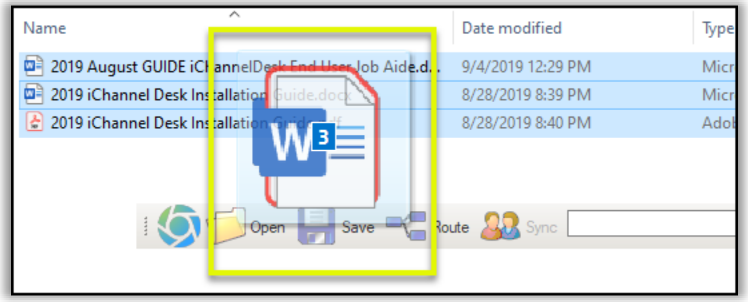
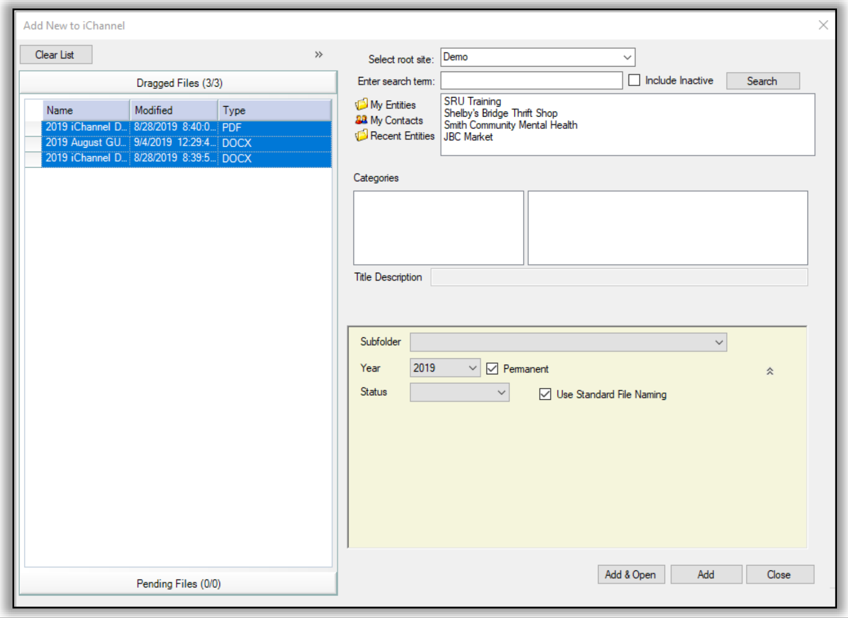


How to Add Document(s)

iChannelDesk has built-in intelligence to make storing client document(s) a quick and easy process. Users have the option to upload one document at a time, or by using the *Control (Ctrl) key* on your keyboard to select multiple documents when uploading. When uploading document(s) into iChannelDesk, there are two options:

- **Copy** – this operation will make a copy of the source document from your local machine and make a new copy within iChannel. To copy, the user must also hold down the “CTRL” key when dragging
- **Move** – this operation will permanently move the document from your local machine into iChannel.

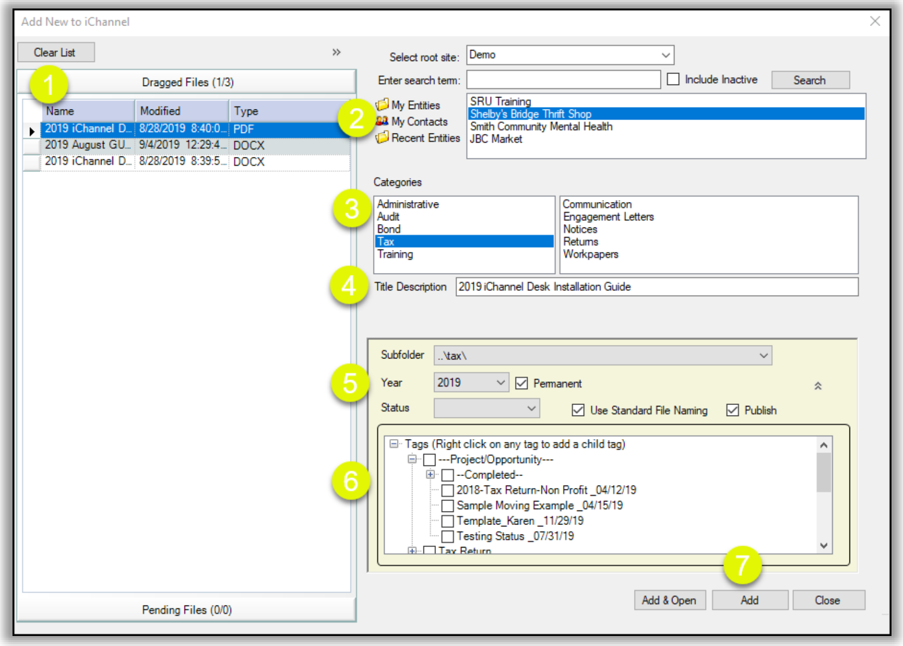
Steps for How to Add Document(s)

Step	Action
1	Locate the document(s) that you want to upload to a Clients File Area. *Click and Drag* the **document(s)** over the **Save** icon on the **iChannelDesk Toolbar.** • **Copy –** highlight a document(s) and *hold down* the "**CTRL**" key at the same time as you drag the document(s) over the Save icon on the iChannelDesk ribbon. • **Move –** highlight a document(s) and drag the document(s) over the Save icon on the iChannelDesk ribbon.  The **Add New to iChannel** window will display. 

2 When *uploading* a document into iChannel using iChannelDesk, you can:

- Upload one document at a time
- Upload several document(s) at the same time
- Upload document(s) to different Entities, Categories, Tags, Projects as needed

Add New Document(s) to iChannel using iChannelDesk



1. *Click* the **box or boxes next to the document(s) name** in the **Dragged Files** section.
2. *Select* either **My Entities**, **My Contacts**, **Recent Entities** to upload the document.
3. *Select* the **Categories (Topic | Subtopic)**.
4. If the uploaded document title needs to be modified, *update* in the **Title Description** field.
5. *Update* the following fields as necessary:
   - **Subfolder**
   - ***Year*** – if the year is left blank, it will default to the current year.
   - ***Status***
   - **Permanent**
   - **Publish**
6. *(Optional) Assign* **Tags** *or* **Project**, *as necessary*.
7. *Click* **Add & Open**, **Add**, or **Close**.

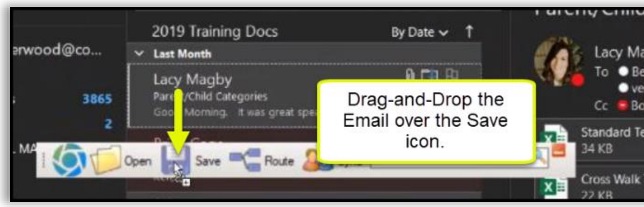
How to Add an Email

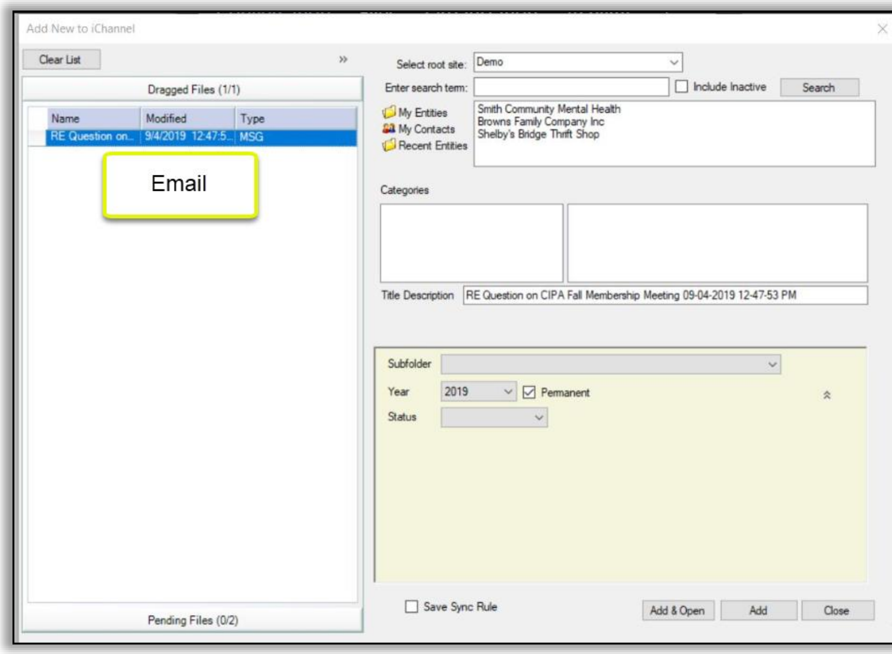
As with adding document(s) to iChannel using **iChannelDesk,** you can use the same process to add **Emails** directly into iChannel. Emails are copied as an Outlook email file (.msg) in the File Area document list. To perform this task, Outlook must be running so iChannelDesk can open/read the email(s). Any attachments will be saved with the message. The same documents features apply to emails as with other document types.

- To only add the attachment in the email to iChannel using iChannelDesk, open the email with the attachment. *Click* the **attachment file(s)** and *drag and drop* the attachment to the **Save** icon on the iChannelDesk toolbar.

Steps for How to Add an Email

Step	Action
1	*Locate* the **email(s)** that you want to upload to a Clients File Area. *Click and Drag* the **email(s)** over the **Save** icon on the **iChannelDesk Toolbar.** The **Add New to iChannel** window will display.

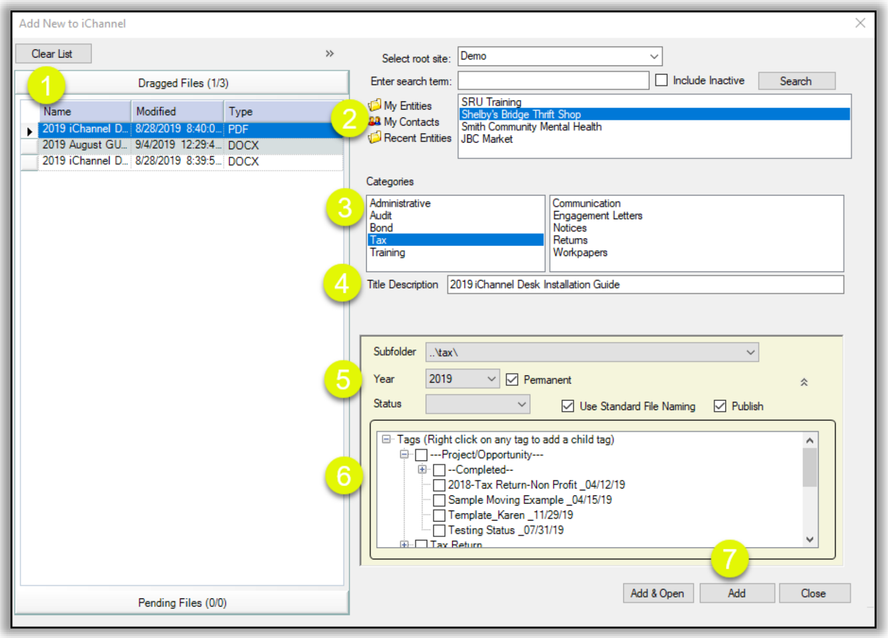




2 When *uploading* an **email** into iChannel using iChannelDesk, you can:

- Upload one email at a time
- Upload several email(s) at the same time
- Upload email(s) to different Entities, Categories, Tags, Projects as needed

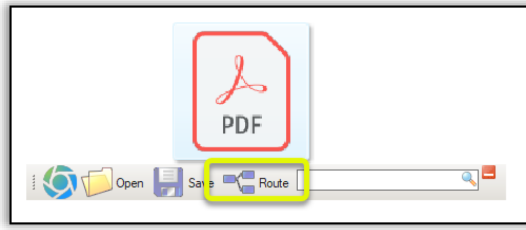
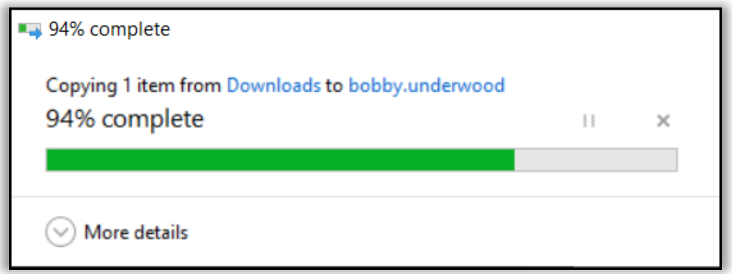
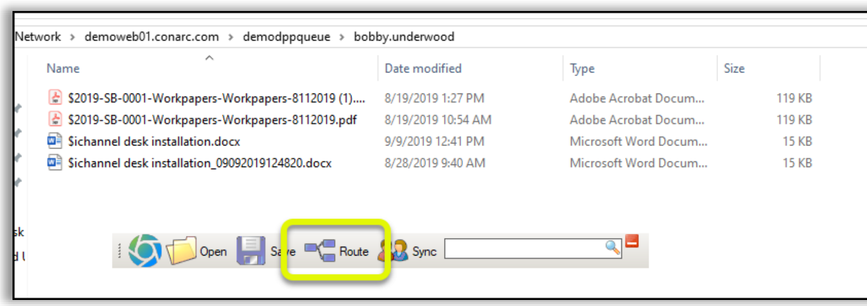
Add Email(s) to iChannel using iChannelDesk



1. *Click* the **box or boxes next to the email(s) name** in the **Dragged Files** section.
2. *Select* either **My Entities**, **My Contacts**, **Recent Entities** to upload the email.
3. *Select* the **Categories (Topic | Subtopic)**.
4. If the uploaded email title needs to be modified, *update* in the **Title Description** field.
5. *Update* the following fields as necessary:
   - **Subfolder**
   - ***Year*** – if the year is left blank, it will default to the current year.
   - ***Status***
   - **Permanent**
   - **Publish**
6. *(Optional) Assign* **Tags** *or* **Project**, *as necessary*.
7. *Click* **Add & Open**, **Add**, or **Close**.

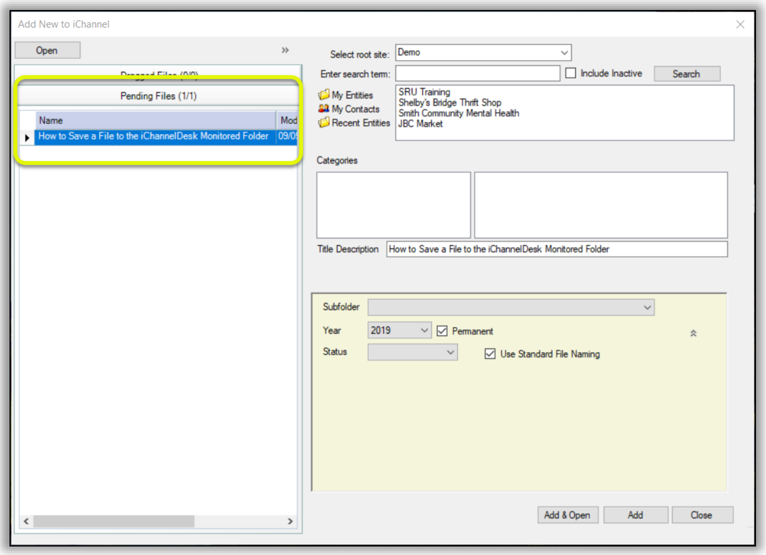
How to Add a Document(s) – Routing Queue

To add document(s) to your **Routing Queue**, *drag and drop* the document(s) to the **Route** icon on the iChannelDesk Toolbar. The document(s) will appear in your routing "**Inbox**" in iChannel.

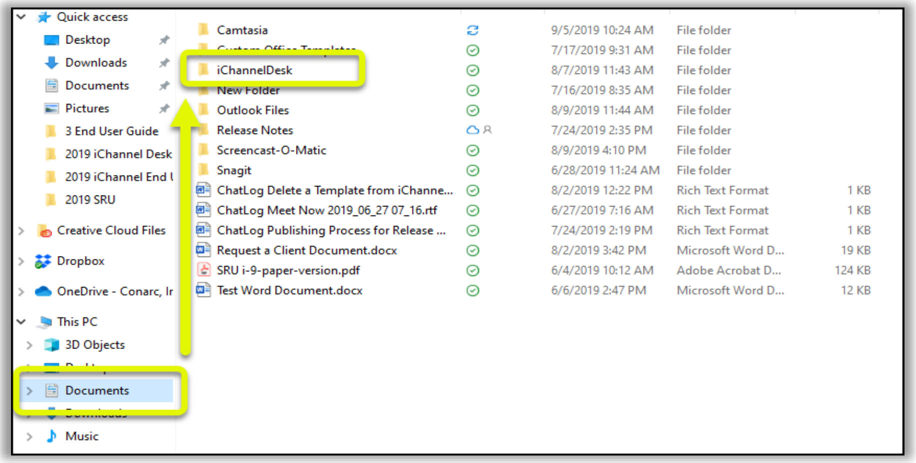
Steps for How to Add a Document(s) – Routing Queue	
Step	**Action**
1	*Locate* the **document(s)** that you want to upload to a Clients File Area. *Click and Drag* the **document(s)** over the **Routing** icon on the **iChannelDesk Toolbar.**  The **Upload** window will display. 
2	To *view* **document(s)** in the Route que, *click* the **Route** icon on the iChannelDesk toolbar. • The **Route** folder will display. 

How to Save Document(s) Directly to iChannelDesk – Monitor Folder

Create and Save new document(s) directly in iChannelDesk using the **Monitor Folder**. All document(s) that are created and saved directly to iChannelDesk using the Monitor Folder will appear in the **Pending Files** section of the File Area. The Monitor Folder feature is intended to make it easier for a user not having to save first to their local drive or to a network folder.

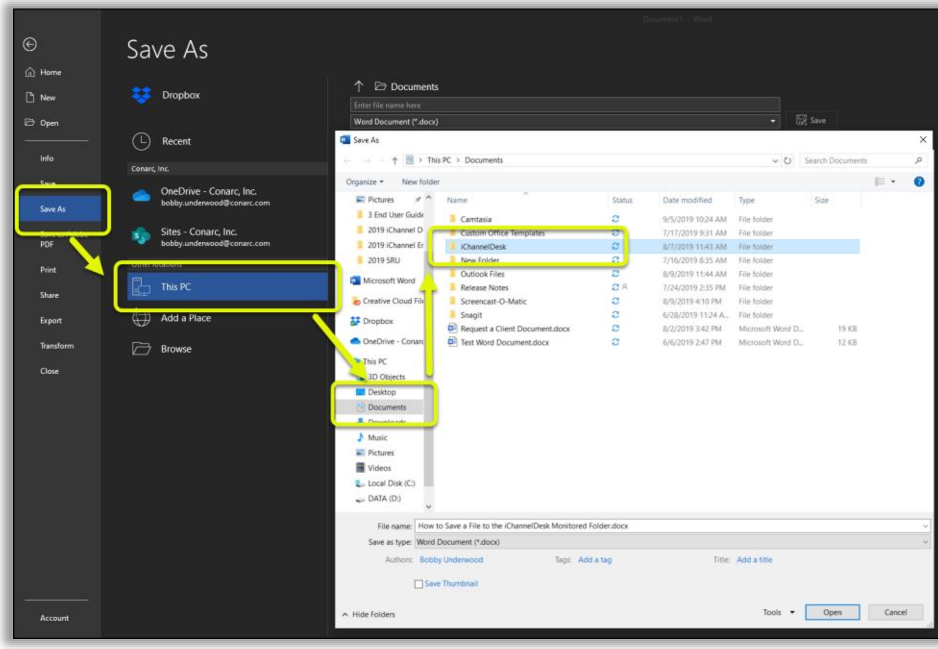


By *default*, when iChannelDesk is installed, the install will *create* a new folder in **Documents** called "i**ChannelDesk**".



Steps for How to Save Document(s) Directly to iChannelDesk

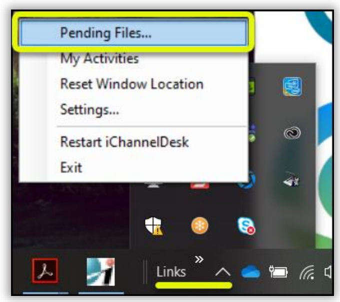
Step	Action
1	*Create* a new **document(s)**. (i.e. Word, Excel, PDF, etc.) *Select* **File > Save As > {Browse}** to the **Documents > iChannelDesk** folder.



2

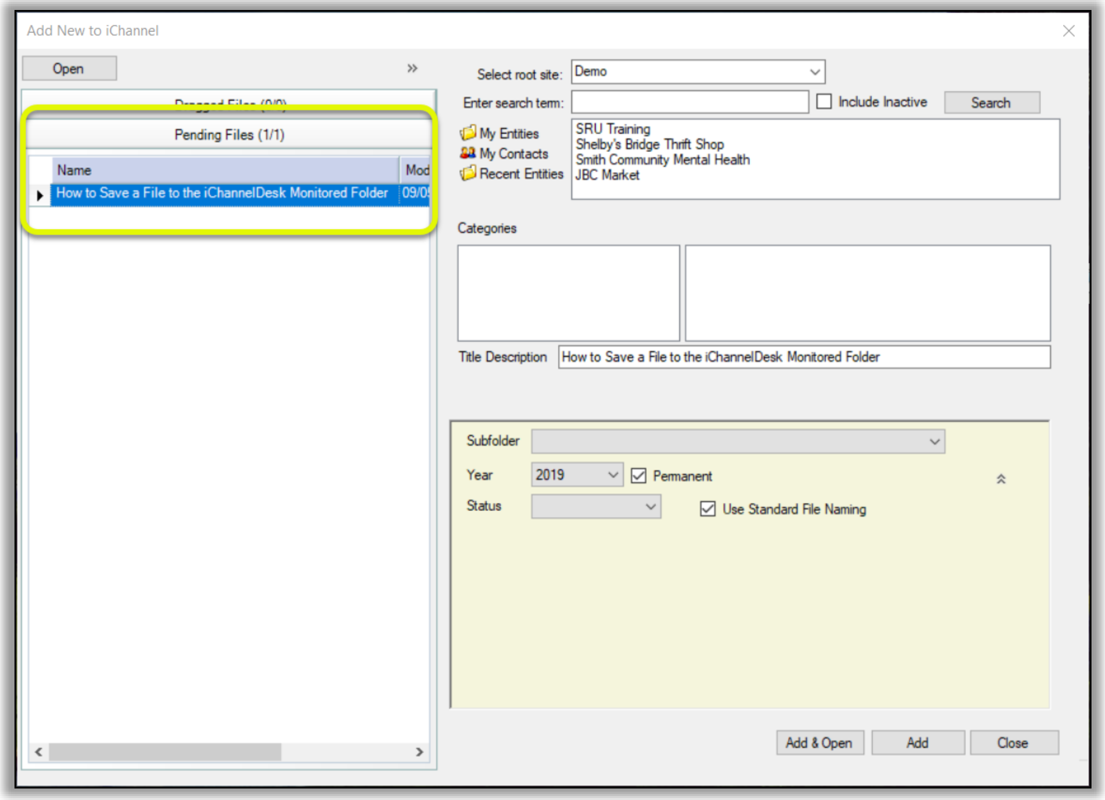
To *access* **iChannelDesk Pending Files:**

- *Right-click* the **iChannelDesk icon** from the toolbar.
- *Access* the **Links** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **Restart iChannelDesk**.



The **Add New to iChannel** window will display. The new document(s) will appear in the **Pending**

Files section.



1. *Click* the **box or boxes next to the document(s) name** in the **Pending Files** section.
2. *Select* either **My Entities**, **My Contacts**, **Recent Entities** to upload the email.
3. *Select* the **Categories (Topic | Subtopic)**.
4. If the uploaded email title needs to be modified, *update* in the **Title Description** field.
5. *Update* the following fields as necessary:
   - **Subfolder**
   - ***Year*** – if the year is left blank, it will default to the current year.
   - ***Status***
   - **Permanent**
   - **Publish**
6. *(Optional) Assign* **Tags** *or* **Project**, *as necessary*.
7. *Click* **Add & Open**, **Add**, or **Close**.

How to use iChannelDesk Sync

iChannelDesk Sync allows users to manage their Contacts in Outlook and provide you with one centralized database. The synchronization allows you to add contacts from Outlook to iChannel and vice versa. Contacts are matched up so that only your business contacts are synced. Once the contacts are in Outlook, they can also be synced to your chose mobile device.

By default, the syncing is always FROM iChannel DOWN to your Outlook. The exceptions to this rule are those contacts which are defined as YOUR contacts in iChannel by the **Responsbile1** or **Responsible2** fields on the Contact record. For those contacts, iChannel will do a **BI-DIRECTIONAL** sync based on which record was updated last.

The iChannelDesk Calendar Sync has been updated. Now if you delete an entry in Outlook, it will be deleted from iChannel during a bi-directional sync. Only items that have never been added to Outlook will be created.

Steps for How to use iChannel Sync

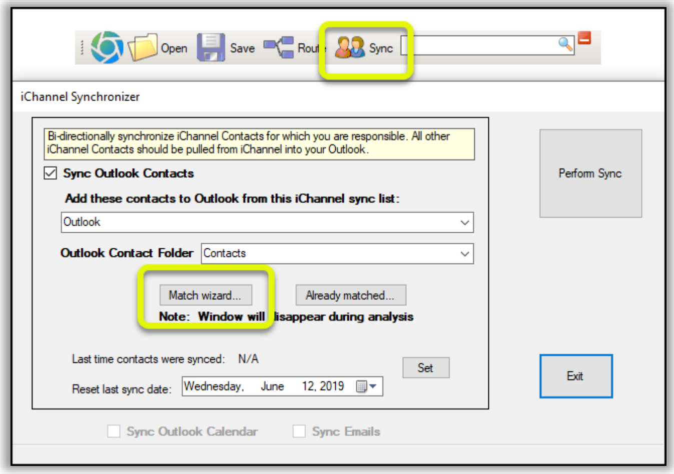
Step	Action

First Time Setup of iChannel Sync

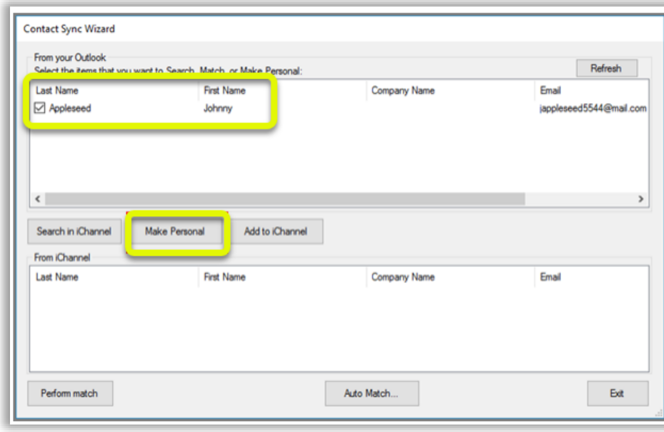
There are several steps that should be done to configure iChannel Sync. iChannelDesk provide to options to setup sync:

- Manual iChannel Sync
- iChannel Prompt Wizard

Step	Action
1	**Designate Personal Contacts** – once a contact in Outlook is identified as Personal, iChannelDesk will ignore these going forward. *Open* **iChannelDesk** and *click* the **Sync** icon. The **iChannel Synchronizer** box will display. *Click* the **Match Wizard** button. The **Contact Sync Wizard** window displays.



In the **From your Outlook**, *select* the items that you want to **Search**, **Match**, or **Make Personal**.



Identity the **personal names** and *select* those by **checking the box**.

Then *click* the **Make Personal** button.

- Once designated as personal, the name will no longer appear in this box. You do not have to complete this process all at once, you may stop at any time and resume later.

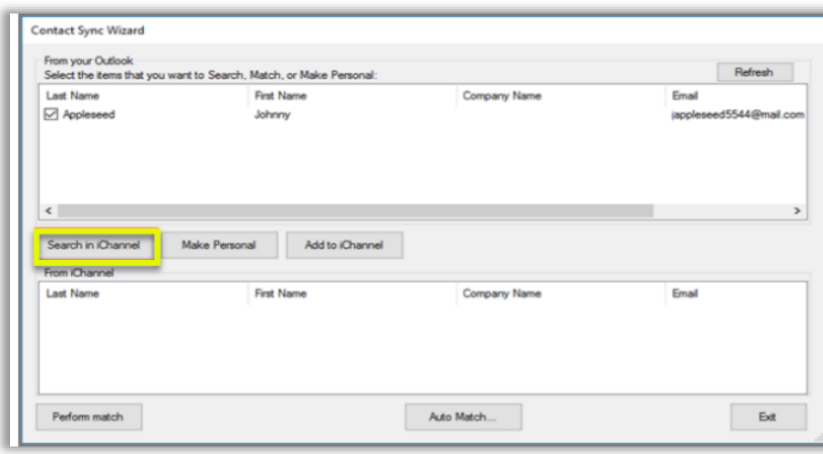
Technical Note: In Outlook, "User Field 4" stores the sync status of the contact. If personal, the world "PERSONAL" is store in this field. If matched with an iChannel Contact, an iChannel ID is stored. If there is no value in this field, we consider the contact as "Unmatched" and the name will display in the From your Outlook list and "nag" you during the sync process to match it.

Keep the **Contact Sync Wizard** screen open and continue to the next step.

2

Match Outlook contacts to those in iChannel - now the list of names in your Contact Sync Wizard should be considerably smaller. At this time, you will need to search to see if each remaining contact can be matched with a contact in iChannel. We understand this may take a while, however it's a one-time process. Again, you may stop at any time and resume later.

Choose a name by *clicking* the **check box**. You can only choose one name at a time for this process.

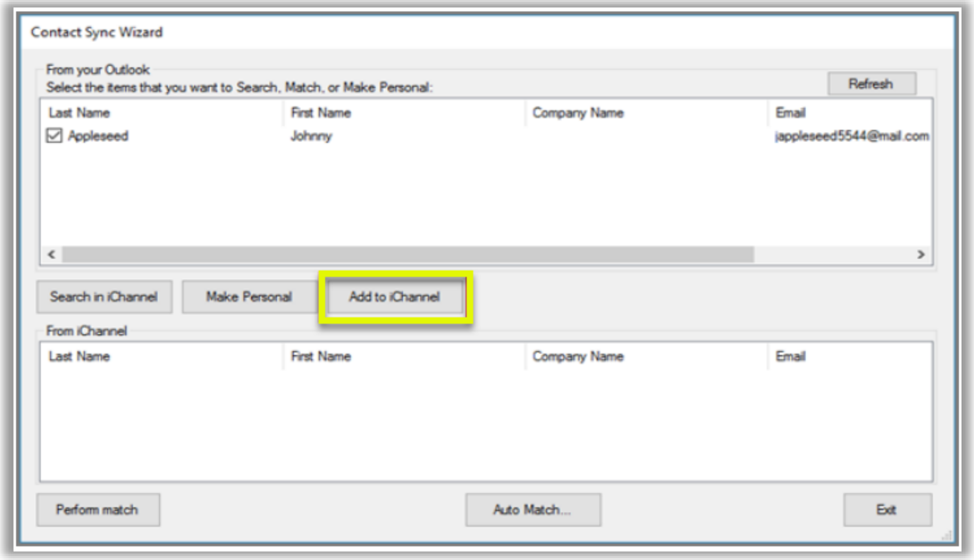


- *Click* the **Search in iChannel** button. iChannel will search the entire contact database to try to locate a match. The From iChannel box will display any matching contacts based on the names, email address, etc.

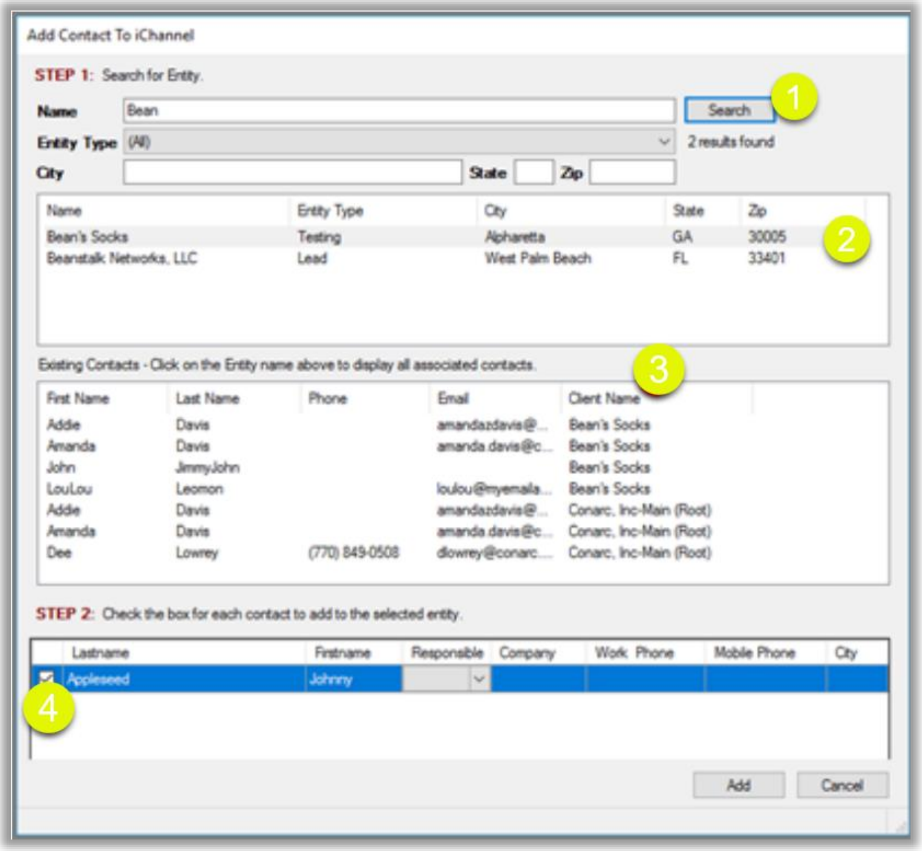
- The possible matches will display in the bottom **From iChannel** box. If iChannel thinks there is an exact match, it will automatically be selected, if not you will need to select one from the possible matching contacts.
- When the match is found, *click* the **Perform Match** button at the lower left. This will link your Outlook contact with the iChannel contact. Continue matching each contact listed in the **From your Outlook** area.
- If the contact cannot be matched to any existing contact in iChannel, continue to the next step to add it to iChannel.

3

Add contacts from Outlook to iChannel - after you have determined the contact cannot be matched to any existing contact in iChannel, you can add it immediately.



- *Select* the **contact name** in the **From your Outlook** area.
- *Click* the **Add to iChannel** button. The **Add Contact To iChannel** box will open.
- *(1) Type* an **Entity** name in the **Name** field and *click* **Search**.
- *(2) Choose* the **Entity** from the resulting list. If the Entity does not exist, you **cannot** add the contact now. The Entity will need to be created in iChannel first.
- (3) Review the existing contacts and confirm the contact does not already exist.
- *(4) Click* the **checkbox for that contact**. *Click* the **Add** button. You will get a confirmation message, *click* **OK**. You will return to the Contact Sync Wizard, which you can close at this time.



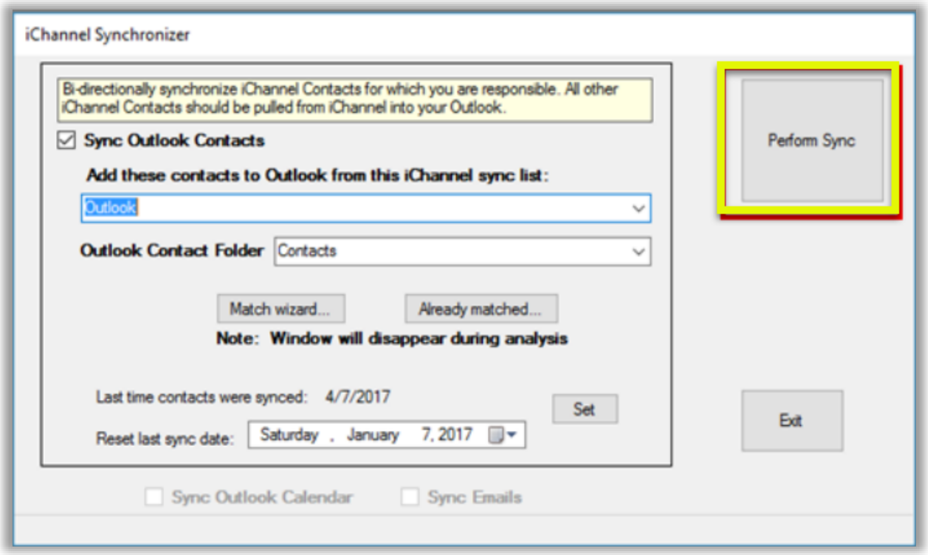
4

Adding Contacts from iChannel to your Outlook - within iChannel, you can specify the contacts that you want sync'd with Outlook. This is done via the **Personal List** *called* "**Outlook**." Please see the iChannel User Guide for instructions on how to set this up.

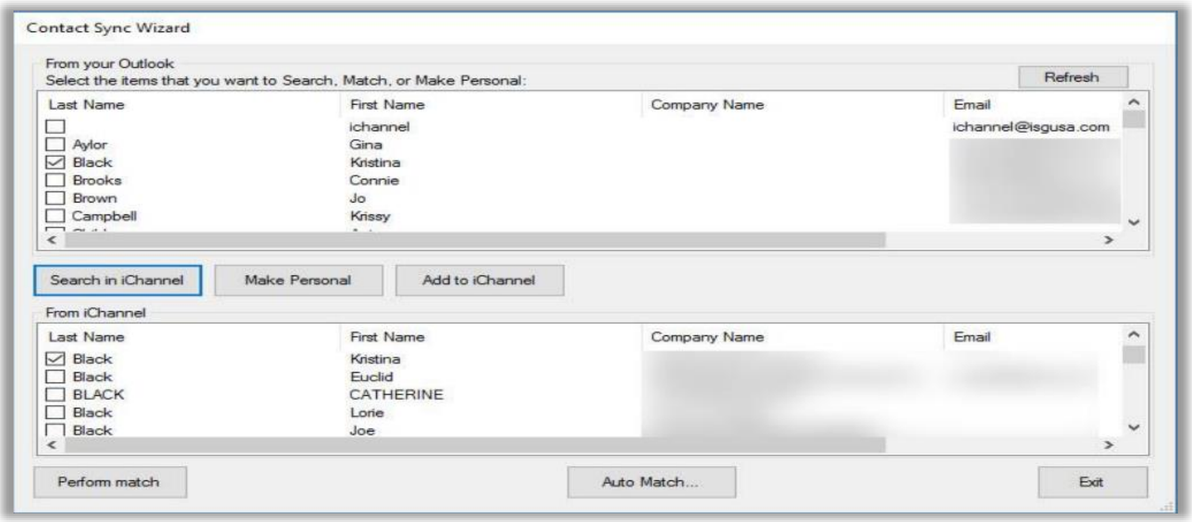
Once your list has been saved, you are ready to add those contacts to Outlook.

- *Open* **Outlook** and **iChannelDesk**.
- *Click* the **Sync** icon on *i***ChannelDesk***.* The **iChannel Synchronizer** box opens*.*

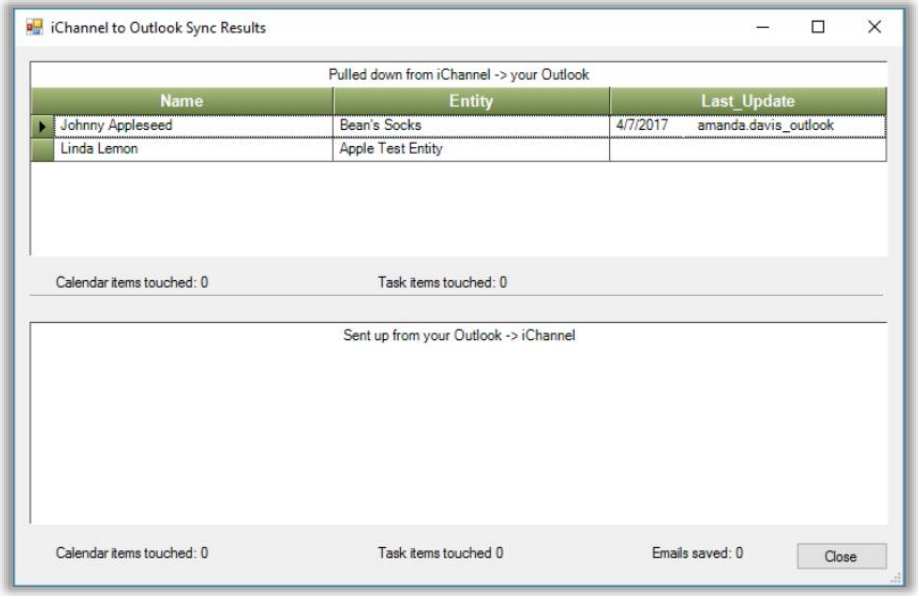
Check the box **Sync Outlook Contacts**. You may have multiple sync lists and they will appear in the drop-down list to choose from.



- *Click* the **Perform Sync** button.
- iChannel Desk will run and when complete, the **Contact Sync Wizard** will open if you have *unmatched contacts*.

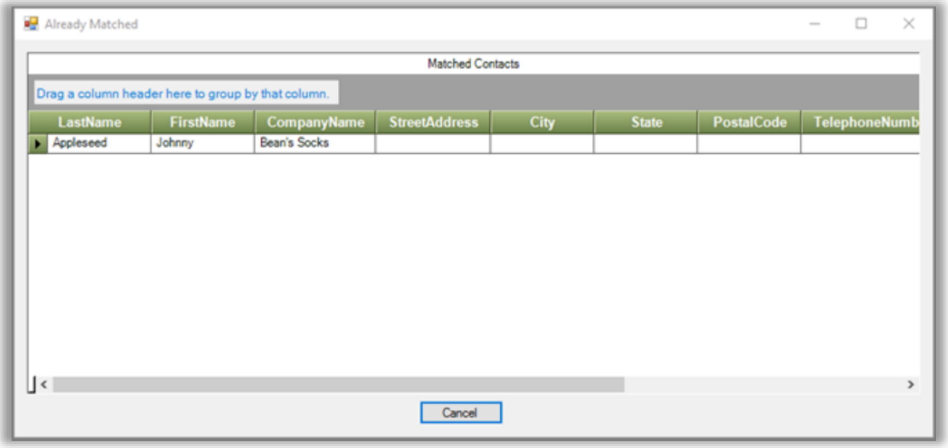


- You may continue to work on the unmatched contacts or skip this step by *clicking* the **Proceed with Sync** button. The **iChannel Contact Synchronizer** will run and display a status bar at the bottom of the box.
- When the sync occurs, the base contact information is synched such as name, company, address, phone(s), and email.
- When the sync is complete, a confirmation box will display the contacts that were updated in iChannel.
- *Click* **OK**. The box will close; the Synchronizer will continue to display and can be closed, too.



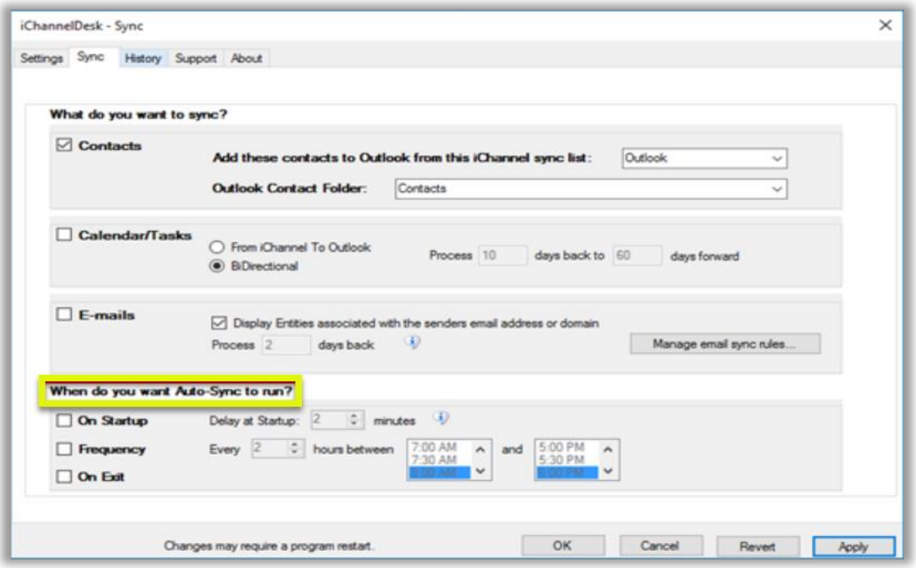
Viewing My Matched Contacts

From the iChannel Contact Synchronizer, *click* on the **Already Matched** button to look at the contacts you are synchronizing between iChannel and Outlook. This grid can be easily re-arranged by clicking on the column name and dragging it into the header.



Daily use of iChannelDesk Sync

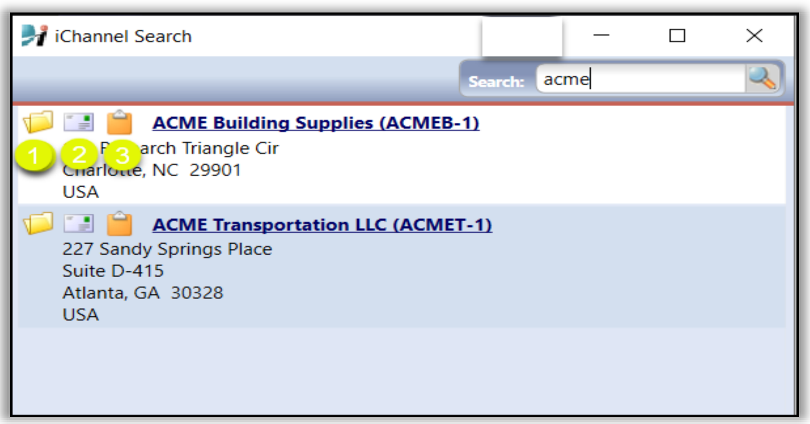
You can either manually (Step 4 above) OR automatically sync all the matched contacts. The settings for automatic syncing are on the iChannelDesk Settings screen. You can choose to Auto-Sync on Startup or Auto-sync on Exit of iChannelDesk.



You can now manually sync during auto sync wait. No matter what you are syncing, new functionality verifies that a manual Sync is not active when initiating the Auto-Sync process; if it is, the Auto-Sync is abandoned. The Sync Button is disabled during the Auto-Sync process and enabled when it is finished.

How to Perform a Quick Search

iChannelDesk can perform a quick entity (client) or contact search using the Quick Search feature on the iChannelDesk toolbar.



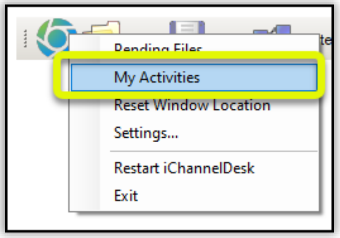
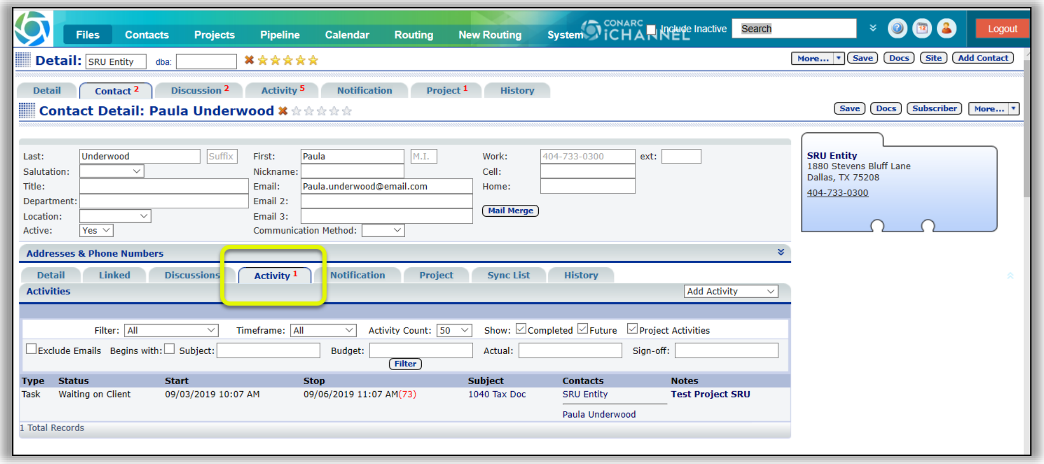
1. If you are logged into iChannel, *click* the **Folder** link will reload the browser window to the File Area of the Entity selected.

2. *Click* **Email** icon will reload the browser to the Entity's Email area.

Click **Clipboard** icon will copy the Name and Address to the clipboard.

How to View My Activities

iChannelDesk provides a quick and easy feature for users to access and view their **Activities (tasks)**.

Steps for How to View My Activities	
Step	**Action**
1	To *access* **My Activities**: • *Right-click* the **iChannelDesk icon** from the toolbar and *select* **My Activities**. • *Access* the **Links** icon from the **Window System Tray.** *Right-click* the **iChannelDesk icon**, *select* **My Activities**.  The user will be *redirected* to **iChannel | User Activity** tab. 

iChannelDesk Support

If you are experiencing any issues with working with iChannelDesk, users can *access* **Settings > Support** tab to create a support ticket that submit the ticket request to iChannel Support Team. The Support tab also has links to various configuration files and a link to *Export Trace Log to Desktop that that the iChannel Administrator* can use to trouble shooting your issues.