iCHANNEL

iChannel Academy

Training & Educational Resources

Getting Started with iChannel

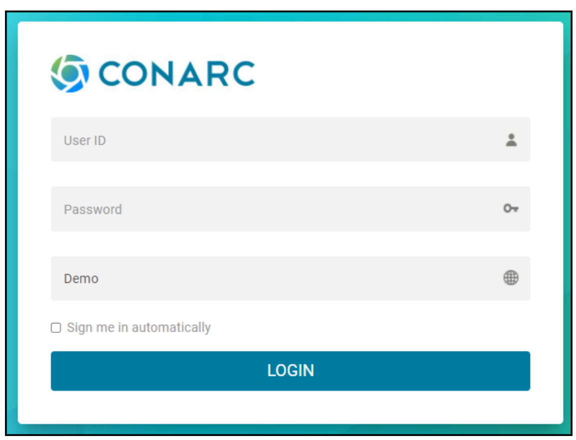
iChannel Dashboard

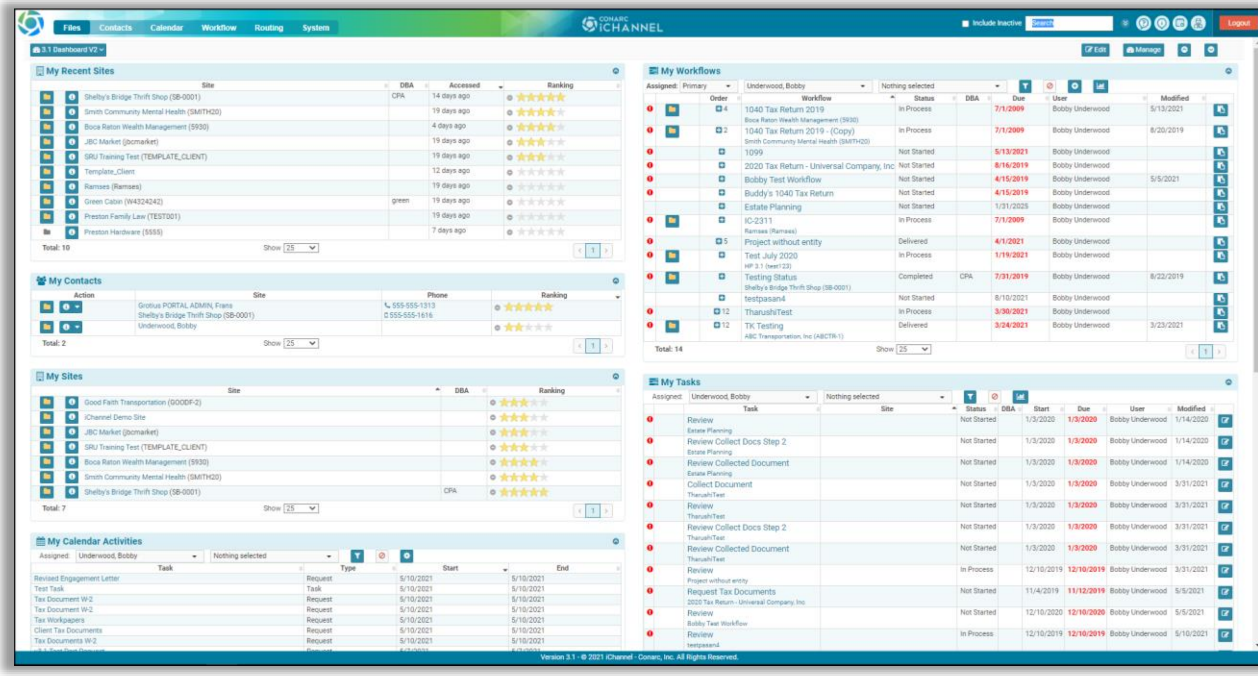
IC-100

Getting Started with iChannel

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.

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**.

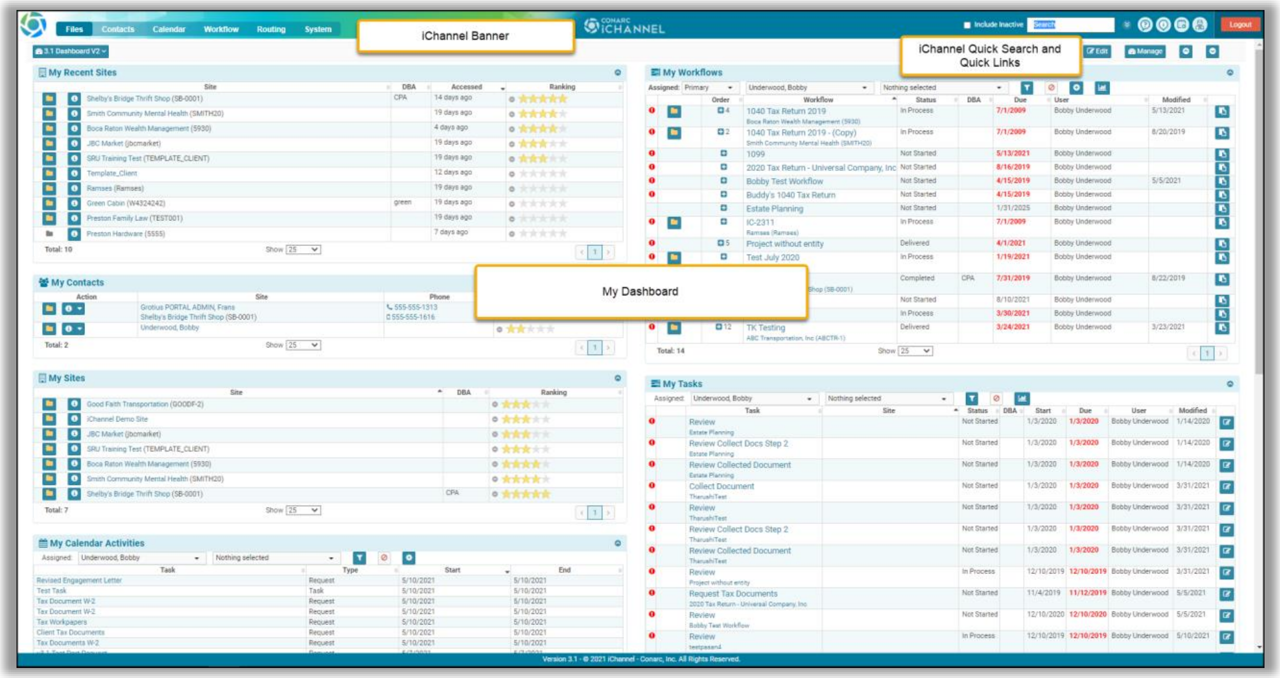
3	In the **Password** field, *enter* your unique password (remember Passwords are case sensitive). • **User ID & Passwords** requirements vary by organization. Please contact your system administrator for your unique User ID and Password requirements.
4	In the **Site Name**, your organization name should be displayed. • Your organization Site Name is: ____________________ *Check* the **Sign me in automatically** check-box if you want iChannel to remember your Login credentia *Click* the **Login** button. Once logged into iChannel, the first screen that will display is the **iChannel Dashboard**. 

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

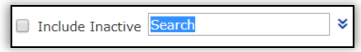


iChannel Banner

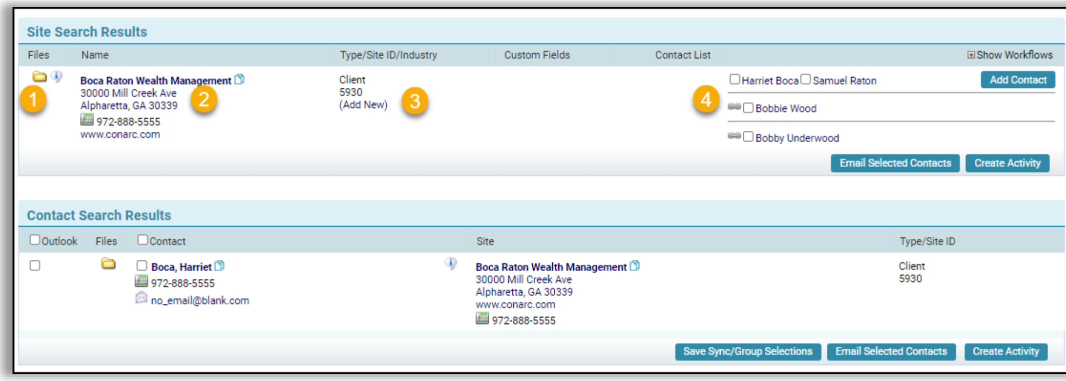
- ***iChannel Home icon*** – "your" company logo will always display at the top left. Clicking your company logo will always take you back to the iChannel Dashboard from any window in iChannel.
- ***iChannel Modules*** – the navigation module(s) provide quick access to different areas of iChannel including: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

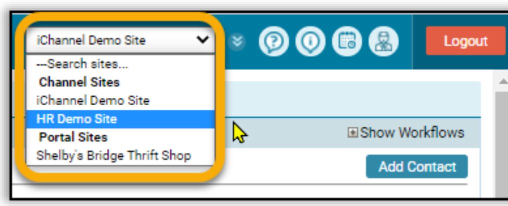
- ***Quick Search*** - allows users to quickly search for Sites or Contacts. To perform a quick search, you will need to enter at least *3-characters* in the search field. If you want to include inactive sites | contacts in your search, put a check in the *Include Inactive* checkbox.



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

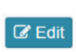


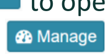
- ***Domain (Root) Sites*** – If you have permission to view additional Domain sites, next to Quick Search is a double-down-arrow, click the arrows. The Quick search changes to a drop-down (Access to other domain sites depends on your security. Not all users have access to other sites and will not see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



  - ***iChannel Community Support and Training*** – click to access Community Support to locate helpful end-user guides, job aids, and iLearning videos.
  - ***Release Notes*** – click to access the latest release notes on iChannel.
  - ***My Activities*** – click to access activities associated with your User ID across all Sites.
  - ***My 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 

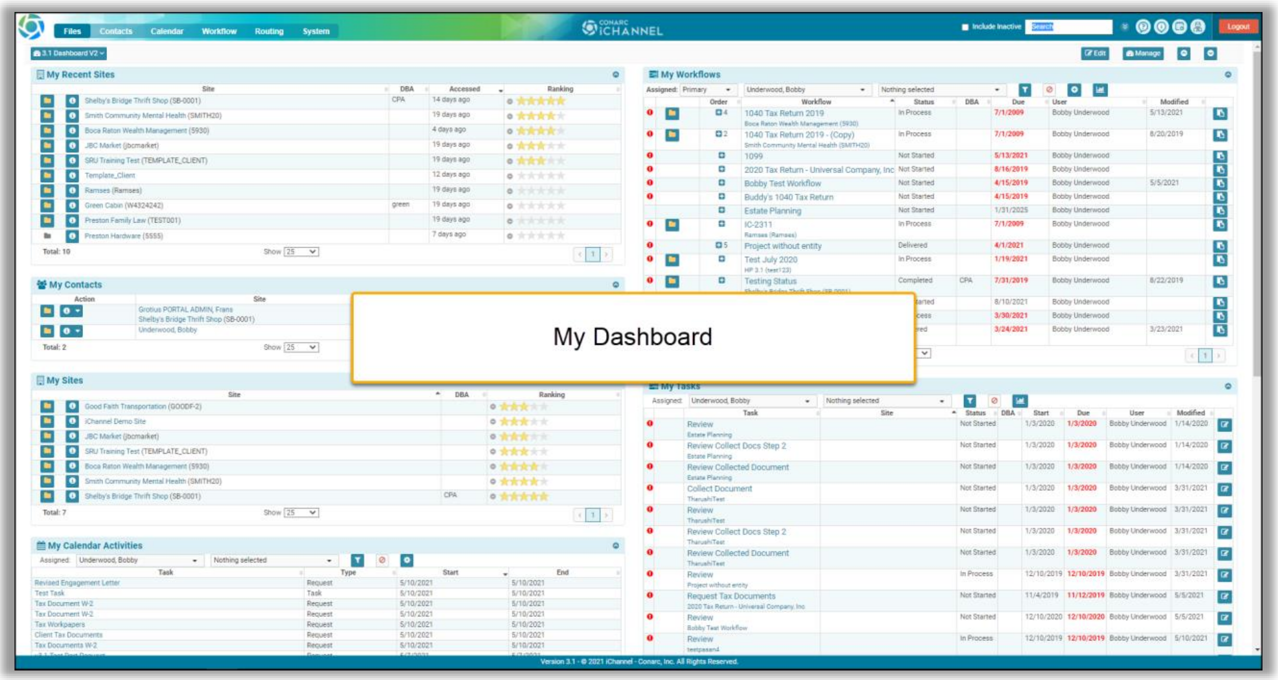
 to open the iChannel My Dashboard editor to customize your dashboard.
- ***Manage*** – click 

 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

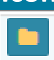
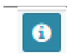
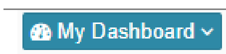
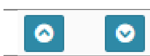
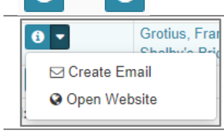
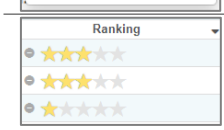
The iChannel Dashboard is highly customizable area where each user can define unique Widgets to display vital information that is important to that user to manager their clients, documents, workflows, and tasks, to name a few.



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.

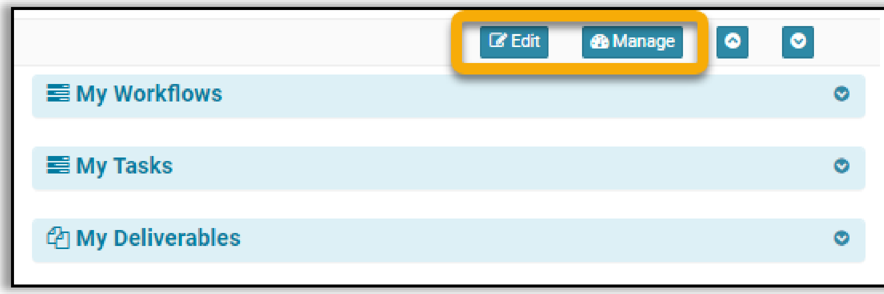
	Recent Entities	The recent client's area **provides links to the client area** you have last accessed. The latest one will be placed on top and move down the list as you visit other file areas. You may click on the folder to go to the document management area for that client.
Files	**My Assigned Documents** **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.
Workflows	**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 Workflows	My Workflows (Projects) 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 workflow 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 Area (File Area) 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.

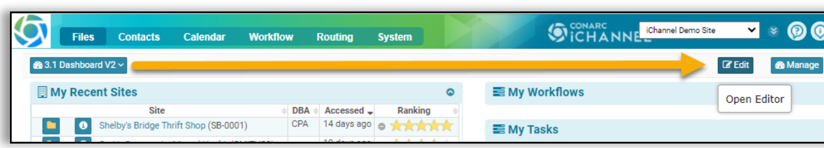
iChannel Dashboard – Customize Your Dashboard Layout | Create New Dashboard (Admin Permission)

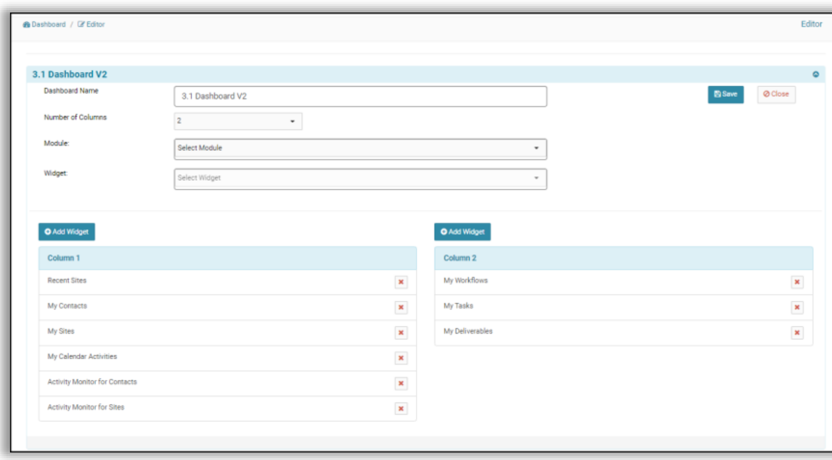
If your System IT Administrator | Organization has given you access rights to the **Edit** or **Manage** features; you can add, edit, modify your widgets on your iChannel Dashboard. In addition, your System IT Administrator | Organization might create an organizational "**default**" dashboard for your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

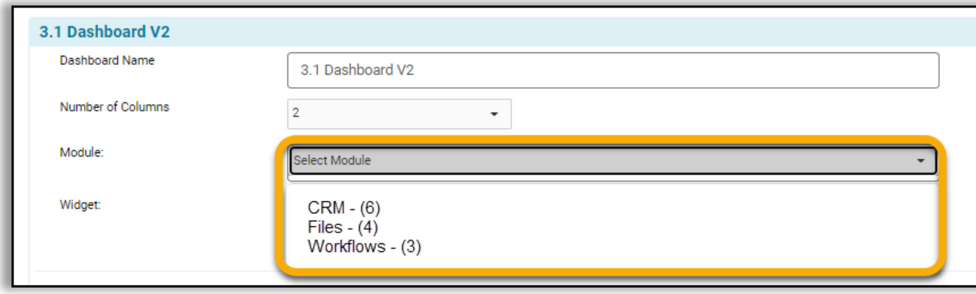




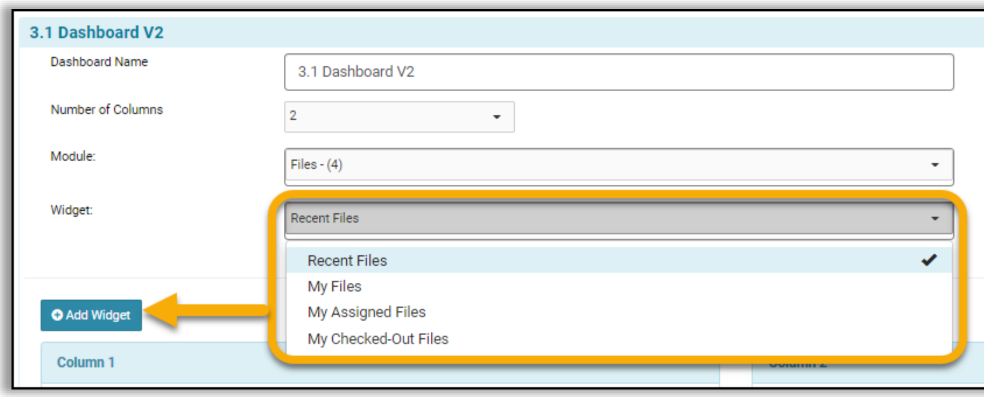
2

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

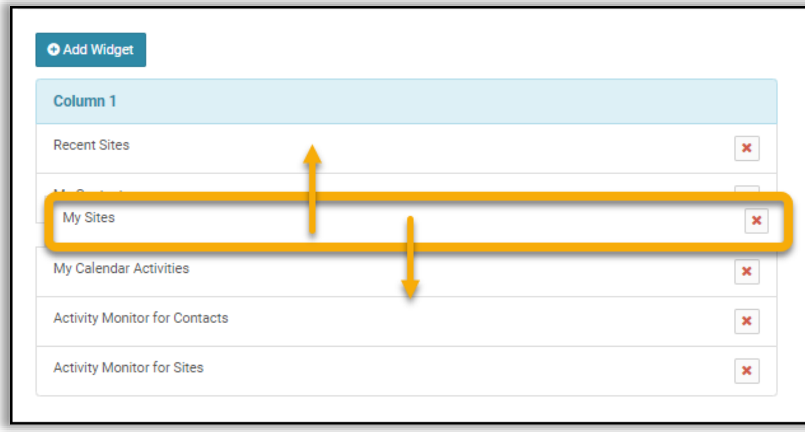


Next, *select* the **drop-down arrow** next to the **Widget** field. From the list, *select* a widget then *click* the **Add Widget** button to add that widget to your column (either Column 1, Column 2 or Column 3, depending on the number of columns you have selected).

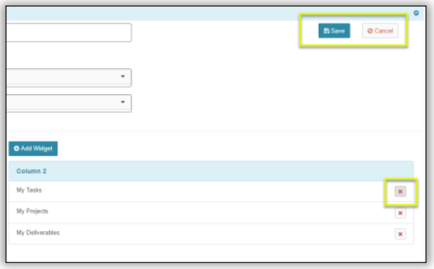


3

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.

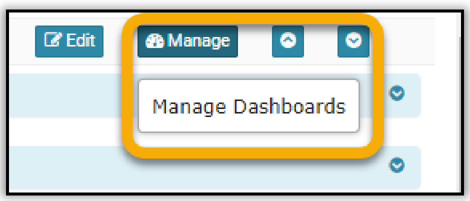
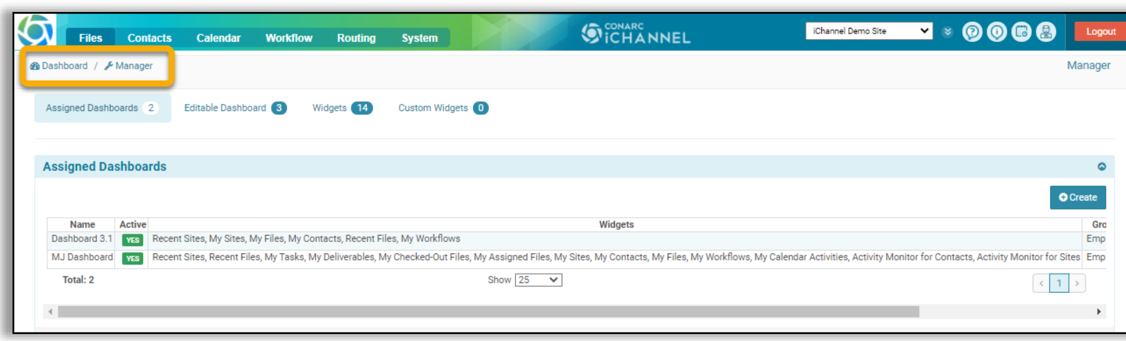


4 To remove a Widget from your Dashboard, *click* the "**red X**" icon next to the widget in the column.
To save your updates, *click* the **SAVE** button. To cancel your updates, *click* the **Cancel** button.

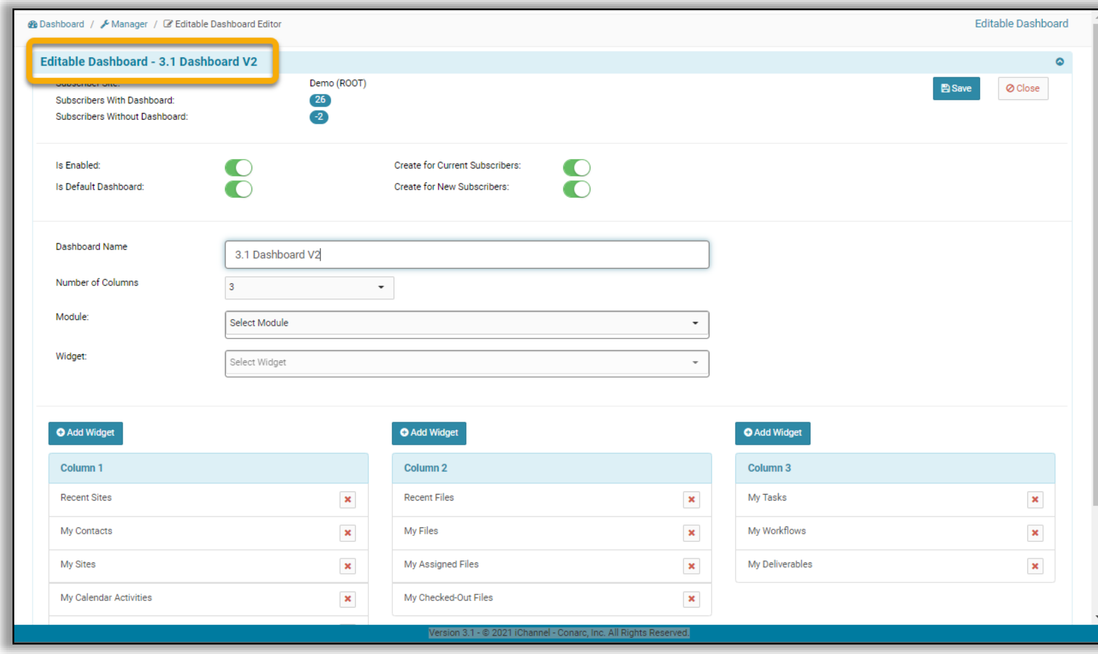


Creating a New Dashboard (Admin Permission)

Steps for Creating a New Dashboard

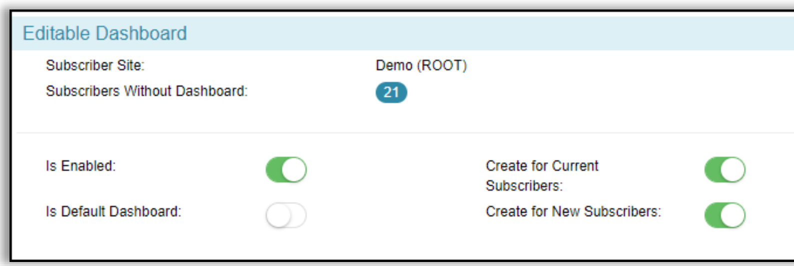
Step	Action
1	*Select* the  icon, the **My Dashboard Editor** window will display.  The **Dashboard | Manager** window displays. 

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



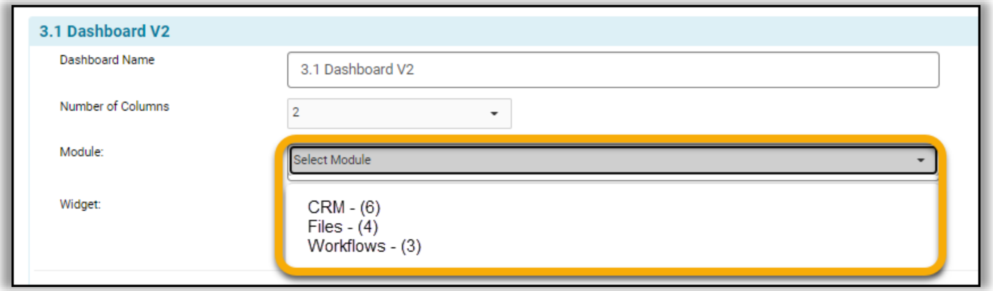
Editable Dashboard

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.

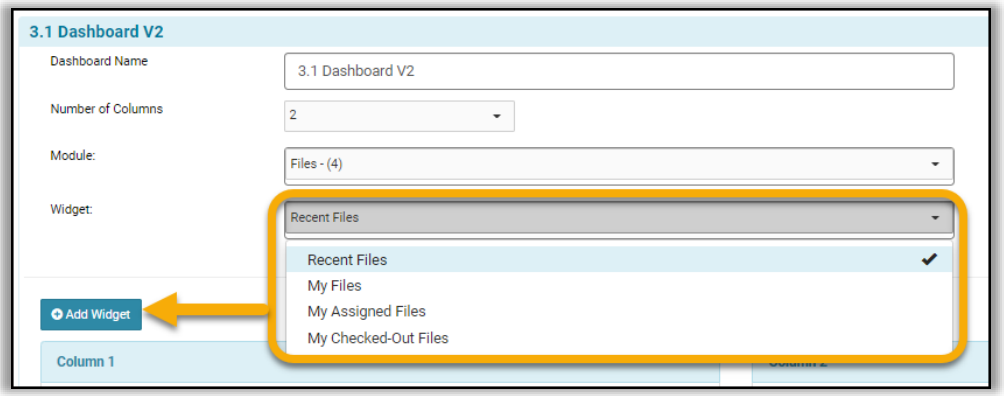


To update the dashboard name, *enter* a new name in the **Dashboard Name** field.
To update the **Number of Columns** that will display on the dashboard, *click* the **drop-down arrow** and *select* either **1**, **2**, or **3** columns. (It's recommended to default to two (2) columns).
To add additional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

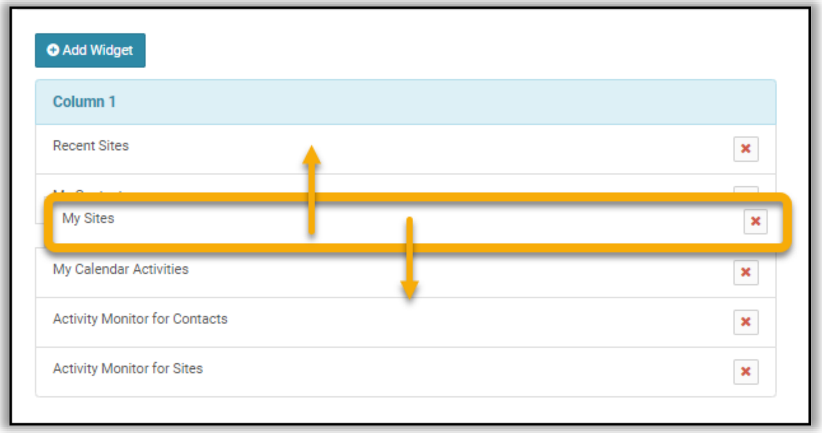
- **CRM – (6):** six widgets can be added to your dashboard
  - Recent Entities, My Contacts, My Entities, My Calendar Activities, Activity Monitor for Contacts, Activity Monitor
- **Files – (4)**: four widgets can be added to your dashboard
  - Recent Documents, My Documents, My Assigned Documents, My Checked-Out Documents
- **Workflows – (3)**: three widgets can be added to your dashboard.
  - My Tasks, My Workflows, 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.