iCHANNEL

Job Aide

iChannel Retention Module

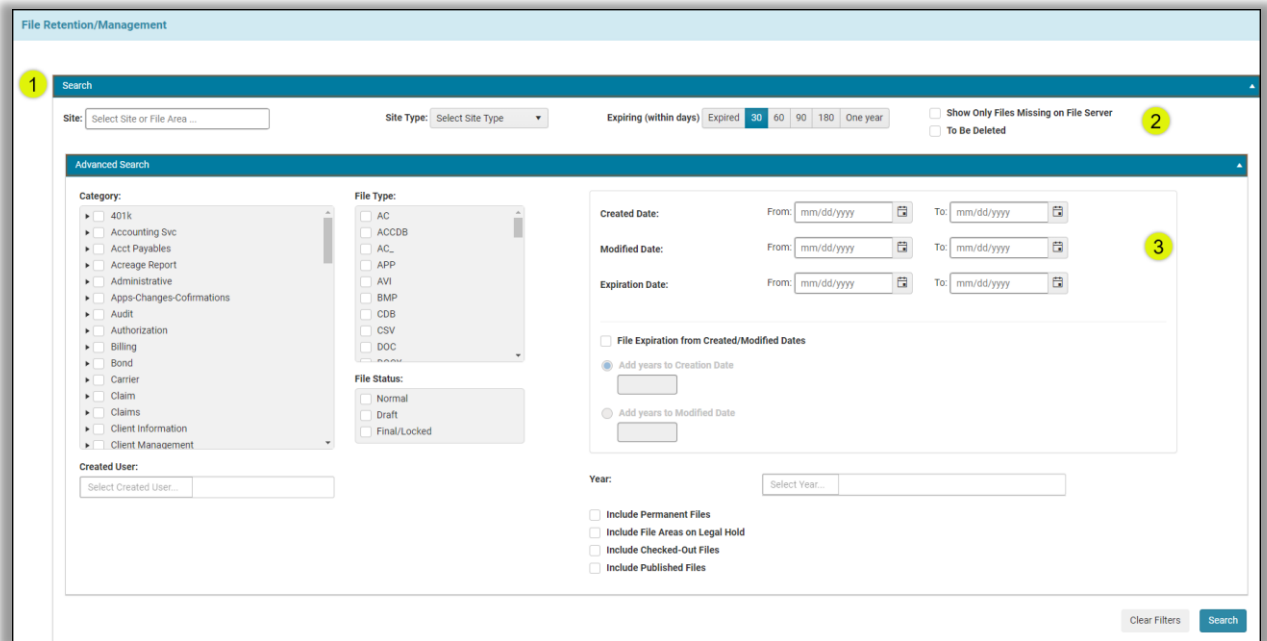## IC-500

iChannel Retention Module - Overview

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

How to Access iChannel Retention Module

| Steps for How to Access iChannel Portal	
Step	**Action**
1	Clients will access **System tab > Retention Management.** ○ Contact your Organization Contact representative if you need assistance with accessing iChannel Retention Module.
2	*After* accessing the Document Archiving and Retention Management link, the first window to display will be the Search section. On the Search window, users have access to:

- ◉ **1 – Search**
  - ○ **2 – Quick Search**
    - ▪ Allows users to filter doucments from frequently used search criterias. Filter options:
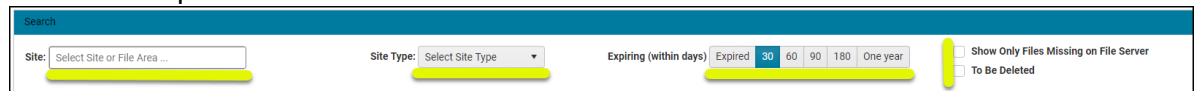
      1. **Site | File Area**

      2. **Site Type**

   3. **Expiring (within days) [Expired/30/60/90/180/Year]**

      4. **Show Only Files Missing on File Server** - Missing Files is a checkbox; when checked, the returned results are files that exist in the database, but do not actually have a matching physical file in the identified file path in the file server.. In other words, this will return missing files from the physical hard drive, but still recorded in the database File table.

      5. **To Be Deleted** – any files that have been marked "For Deletion" will be returned. Expiring (within days) filter will be ignored.
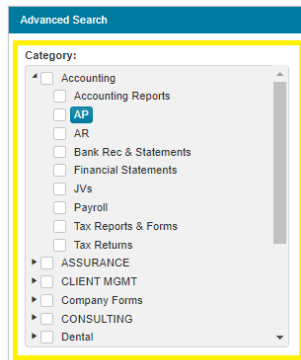
  - ○ **2 – Advanced Search**

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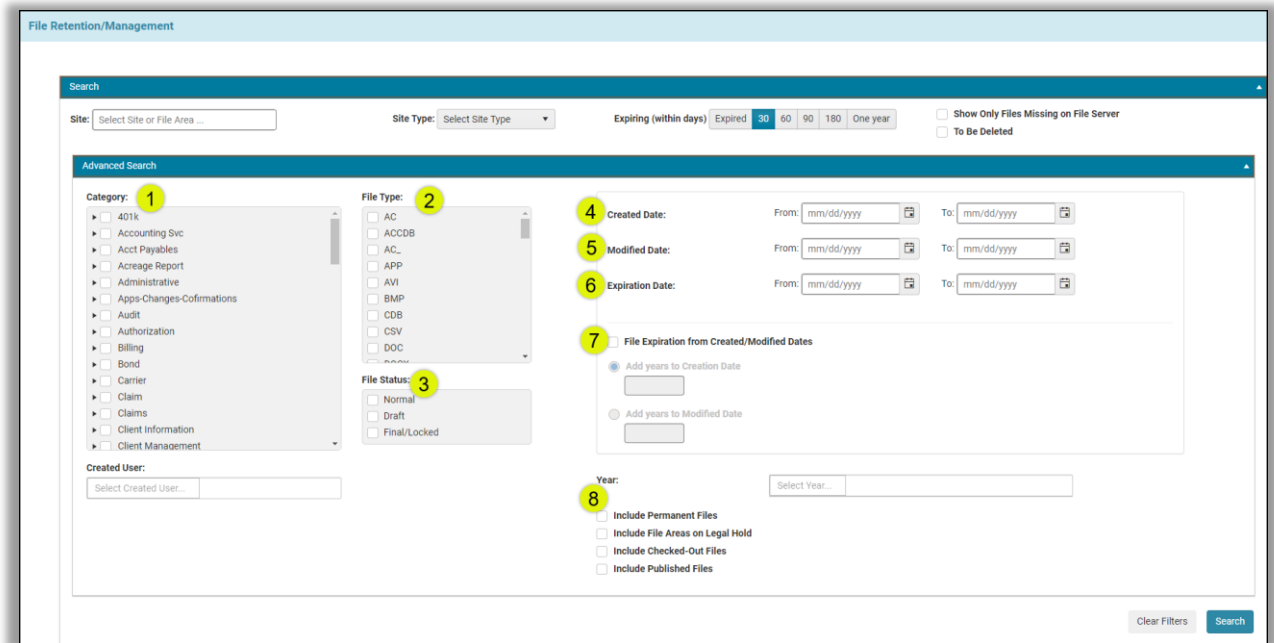
1. **Category**

2. **File Type**

File Type:

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

Document Status:

- Normal
- Draft
- Final/locked
- To Be Deleted

3. **Document Status**

- DOT
- DSW
- EML

Document Status:

- Normal
- Draft
- Final/locked
- To Be Deleted

4. **Created Date (range)**

	From:	To:
Created Date:	mm/dd/yyyy	mm/dd/yyyy
Modified Date:	mm/dd/yyyy	mm/dd/yyyy
Expiration Date:	mm/dd/yyyy	mm/dd/yyyy

5. **Modified Date (range)**

	From:	To:
Created Date:	mm/dd/yyyy	mm/dd/yyyy
Modified Date:	mm/dd/yyyy	mm/dd/yyyy
Expiration Date:	mm/dd/yyyy	mm/dd/yyyy

6. **Expiration Date (range)**

	From:	To:
Created Date:	mm/dd/yyyy	mm/dd/yyyy
Modified Date:	mm/dd/yyyy	mm/dd/yyyy
Expiration Date:	mm/dd/yyyy	mm/dd/yyyy

7. **File Expiration from Created/Modified Dates**

☐ **File Expiration from Created/Modified Dates**

◉ Add years to Creation Date

◯ Add years to Modified Date

8. **Year & Include Permanent Documents (checkbox)**

Year: [Select Year...]

☐ Include Permanent Files
☐ Include File Areas on Legal Hold
☐ Include Checked-Out Files
☐ Include Published Files

2 – Documents (Search Results)
  o The **Search Result** is a table/grid which shows the important attributes of document records matched with the filter criteria

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

| ☐ | 2014-erins test site-case studies-freedom home care-03102014_0255pm | DOC0037997 PUBLISHED | 2014-erins test site-case studies-freedom home care-03102014_0255pm.pdf | PDF | 01/30/2015 | 03/10/2014 | Normal | 275.1KB | \\CHANNEL\CINTRA\E\ERINS TEST SITE\ |

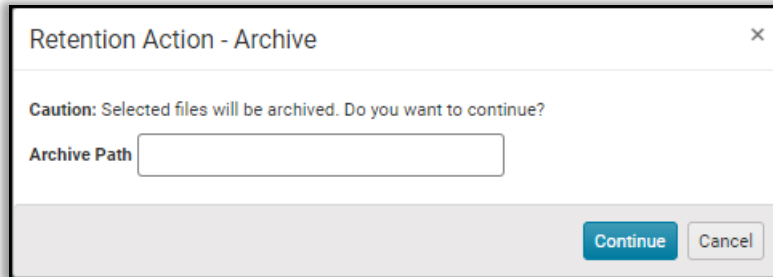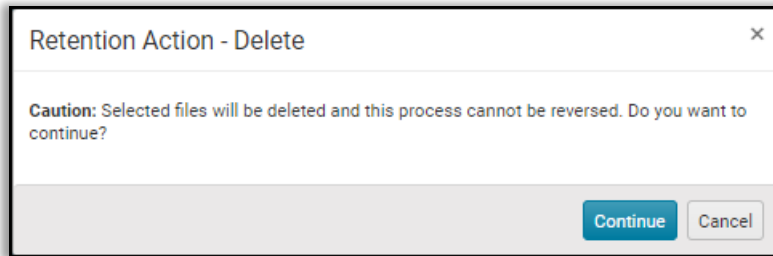| 4	**Export to Excel** – the searched results can be exported as an Excel file.

5

Archive | Delete | Archive and Delete
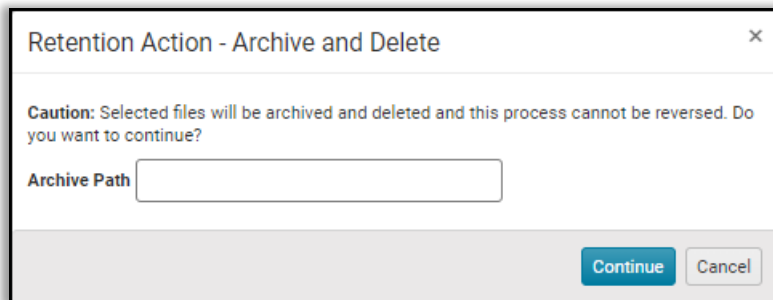
- **Archive** – select file(s) from the search results that you would like to archive from iChannel. Archive file(s) are removed from iChannel, yet the client will provide an Archive "path" to store a copy of the file.

Retention Action - Archive   ×

Caution: Selected files will be archived. Do you want to continue?

Archive Path [   ]

Continue | Cancel

- **Delete** – select file(s) from the search that you would like to "permanently" delete from iChannel and the iChannel File Server.

Retention Action - Delete   ×

Caution: Selected files will be deleted and this process cannot be reversed. Do you want to continue?

Continue | Cancel

- **Archive and Delete** – User can perform both Archive and Delete functions at the same time.

Retention Action - Archive and Delete   ×

Caution: Selected files will be archived and deleted and this process cannot be reversed. Do you want to continue?

Archive Path [   ]

Continue | Cancel

- **Retention Report** [Retention History] – User can generate a date range report to show Retention History

Date From	1/1/2021		Date To	6/1/2021	

|◁ ‹ 1 of 1 › ▷| ↻ ⊕ 100% 💾 ⌄ 🖶 | Find | Next |

Retention History Report

From : 1/1/2021

To : 6/1/2021

No	Session Id	Policy	Status	Created On	Executed By	Execution Time	Total Success	Total Failed
1	7	Archive	Completed	1/19/2021	ADMINISTRATOR USER	0 s	1	0
2	8	Archive	Completed	1/19/2021	ADMINISTRATOR USER	0 s	1	0
3	9	Delete	Completed	1/21/2021	ADMINISTRATOR USER	0 s	1	0
4	10	Archive	Completed	1/21/2021	ADMINISTRATOR USER	0 s	1	0
5	11	Delete	Completed	2/3/2021	ADMINISTRATOR USER	0 s	1	0
6	12	Delete	Completed	2/9/2021	Zone Admin	0 s	2	0
7	13	Archive	Completed	2/23/2021	ADMINISTRATOR USER	1 s	0	1
8	14	Archive & Delete	Completed	3/31/2021	Zone Admin	0 s	1	0
9	15	Delete	Completed	5/7/2021	Bobby Underwood	0 s	1	0
10	16	Delete	Completed	5/7/2021	Bobby Underwood	0 s	1	0
11	17	Delete	Completed	5/7/2021	Bobby Underwood	11 s	39	5

Executed On: 6/1/2021 5:37:07 PM		Page: 1 of 1