



Job Aide

iChannel Retention Module

IC-500

iChannel Retention Module - Overview

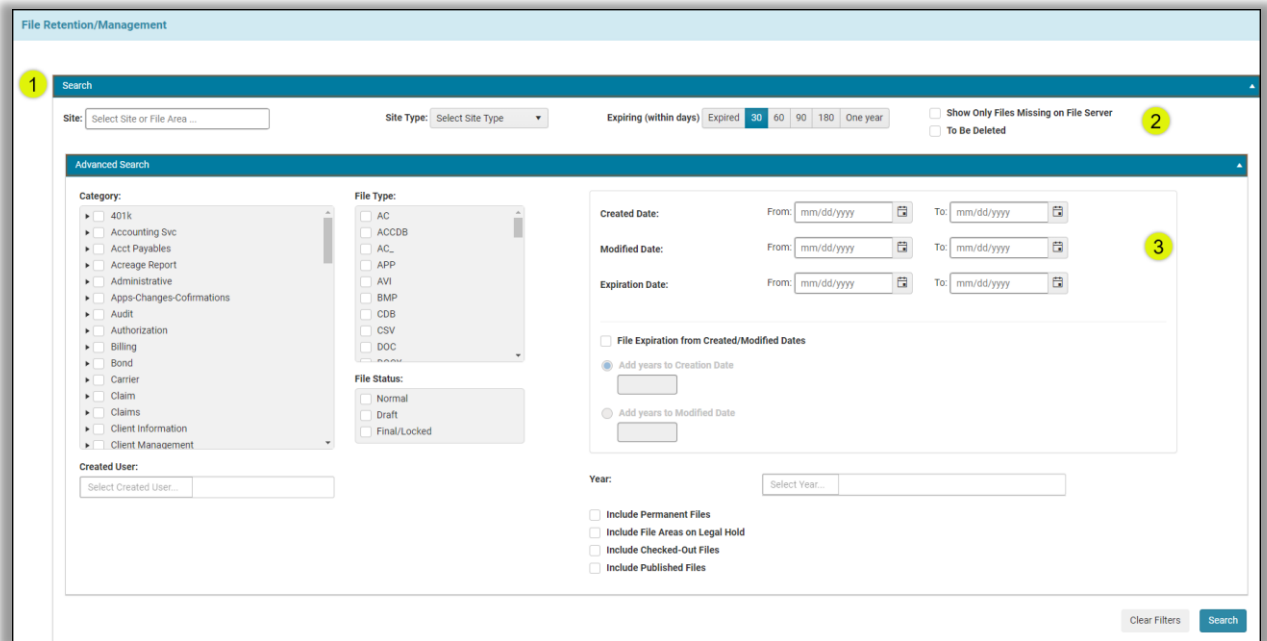
iChannel Retention Module provides clients with the ability to identify the parameters when archiving and setting retention policies on documents. Below will provide an overview of the features and functionalities. To *access* the **iChannel Retention Module** (Administrative permission): **System tab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

How to Access iChannel Retention Module

Steps for How to Access iChannel Portal

Step	Action
<p>1</p>	<p>Clients will access System tab > Retention Management.</p> <ul style="list-style-type: none"> Contact your Organization Contact representative if you need assistance with accessing iChannel Retention Module. <div data-bbox="483 810 1295 1247" data-label="Image"> <p>The screenshot shows the iChannel portal interface. At the top, there is a navigation bar with tabs: Files, Contacts, Calendar, Workflow, Routing, and System. The 'System' tab is highlighted with a yellow box. Below the navigation bar, there is a sidebar menu with the following items: System, Sites, Subscribers, Security Groups, Modules, Retention Management (highlighted with a yellow bar), and Reports. Below the sidebar is a 'Quick Links' section. The main content area shows 'SYSTEM » Sites' and a 'Search Criteria' section with various input fields: Login Site Name, Site Name, Site Code, Template (dropdown), and Sort By (dropdown). There is also a checkbox for 'Begins With'.</p> </div>
<p>2</p>	<p>After accessing the Document Archiving and Retention Management link, the first window to display will be the Search section. On the Search window, users have access to:</p>

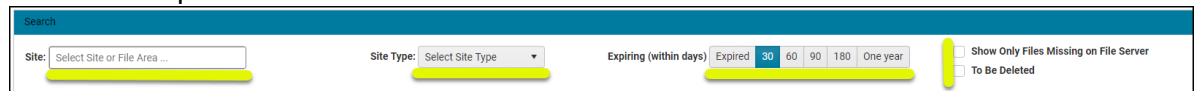




1 – Search

2 – Quick Search

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



1. Site | File Area

2. Site Type

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

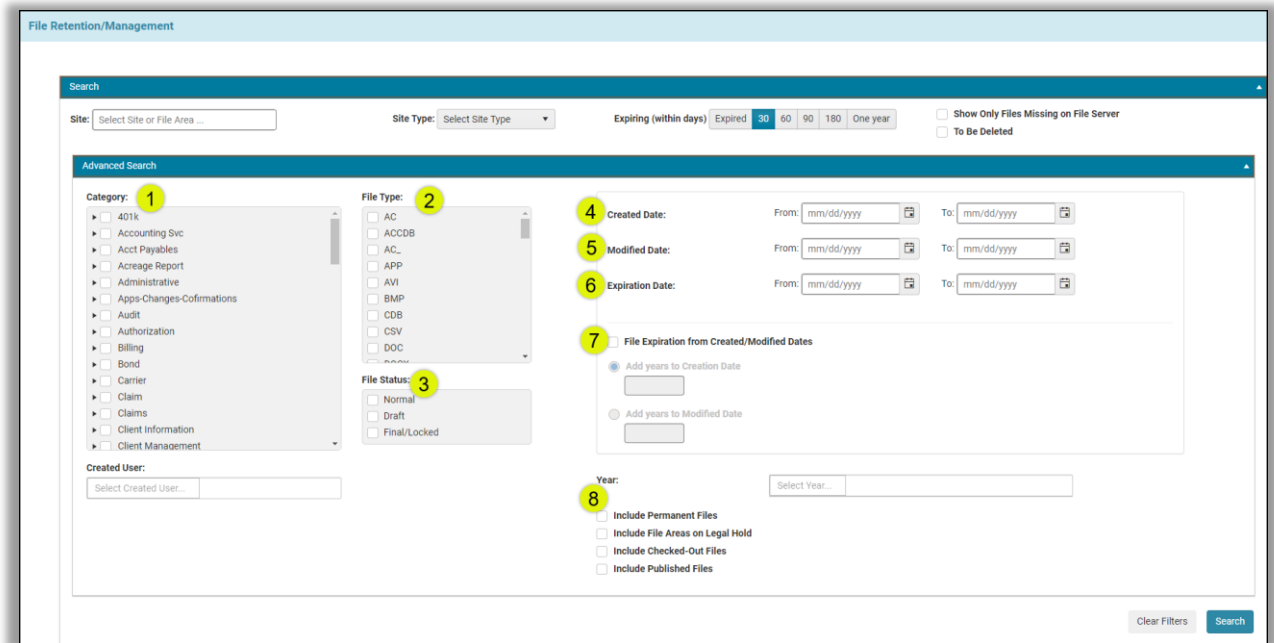
4. Show Only Files Missing on File Server - Missing Files is a checkbox; when checked, the returned results are files that exist in the database, but do not actually have a matching physical file in the identified file path in the file server.. In other words, this will return missing files from the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

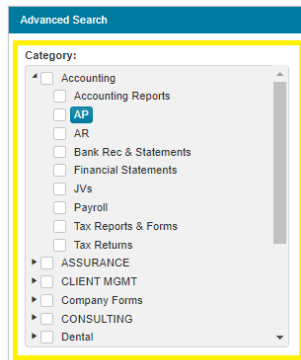
2 – Advanced Search



- 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)

Created Date: From: To:

Modified Date: From: To:

Expiration Date: From: To:

5. Modified Date (range)

Created Date: From: To:

Modified Date: From: To:

Expiration Date: From: To:

6. Expiration Date (range)

Created Date: From: To:

Modified Date: From: To:

Expiration Date: From: To:

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:

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

2 – Documents (Search Results)

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

Site Name	File Code	File Name	File Type	Created Date	Last Modified Date	File Date	File Size	Location
High Desert Ice Cream Parlor	DOC000807	2020-HDCP-967654-08 Report-February-02 18 2020-2182020.pdf	PDF	02/18/2020	02/21/2020	To Be Deleted	33 KB	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\PP\... REBERT ICE CREAM PARLOR
McDonnell mcd11	DOC002285	2021-wat43432-Billing-Aut0210516074755.pdf	PDF	05/16/2021	05/16/2021	To Be Deleted	895 KB	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\LOC... N0211\ADMINISTRATIVE\BILLING
	DOC002286	2021-wat43432-Billing-Aut0210516073806.pdf	PDF	05/16/2021	05/16/2021	To Be Deleted	895 KB	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\LOC... N0211\ADMINISTRATIVE\BILLING
	DOC002408	2021-wat43432-Billing-Aut0210530085812.pdf	PDF	05/30/2021	05/30/2021	To Be Deleted	895 KB	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\LOC... N0211\ADMINISTRATIVE\BILLING
	DOC002409	2021-wat43432-Billing-Aut0210530085824.pdf	PDF	05/30/2021	05/30/2021	To Be Deleted	895 KB	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\LOC... N0211\ADMINISTRATIVE\BILLING
Peik, Jeremy and Jennifer	DOC000839	2020-Pub-1234567-Communication-2020 iChannel Upgrade Coming Attractions 5132020.msg	MSG	05/12/2020	05/12/2020	To Be Deleted	808	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\PP\... JEREMY & JENNIFER\AUDI\COMMUNICATION
	DOC000837	2020-Pub-1234567-Communication-Accepted Internal Call for Superstein & Superstein Kick-Off 5132020.msg	MSG	05/12/2020	05/12/2020	To Be Deleted	849	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\PP\... JEREMY & JENNIFER\AUDI\COMMUNICATION
	DOC000840	2020-Pub-1234567-Communication-RE 2020 iChannel Upgrade Coming Attractions 5132020.msg	MSG	05/12/2020	05/12/2020	To Be Deleted	808	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\PP\... JEREMY & JENNIFER\AUDI\COMMUNICATION
	DOC000838	2020-Pub-1234567-Communication-RE Kickoff Call for Superstein & Superstein 5132020.msg	MSG	05/12/2020	05/12/2020	To Be Deleted	217 KB	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\PP\... JEREMY & JENNIFER\AUDI\COMMUNICATION
	DOC000836	2020-Pub-1234567-Communication-RE Kickoff Call for Superstein & Superstein 5132020.msg	MSG	05/12/2020	05/12/2020	To Be Deleted	172B	\\VCHANTSTWEB.conarc.com\DEMOCINTRA\PP\... JEREMY & JENNIFER\AUDI\COMMUNICATION

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

<input type="checkbox"/>	2014-erins test site-case studies-freedom home care-03102014_0255pm	DOC0037997	PUBLISHED	2014-erins test site-case studies-freedom home care-03102014_0255pm.pdf	PDF	01/30/2015	03/10/2014	Normal	275.1KB	\\VCHANNEL\CINTRA\ERINS TEST SITE\
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4 Export to Excel – the searched results can be exported as an Excel file.




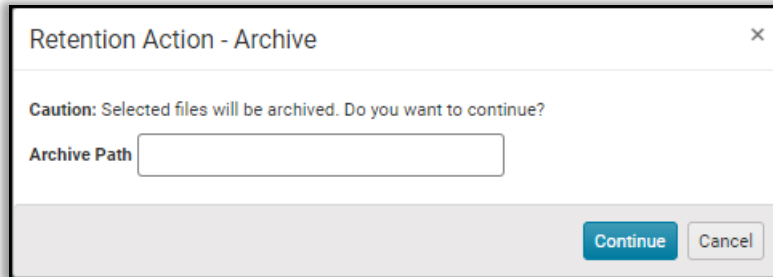
5


Archive

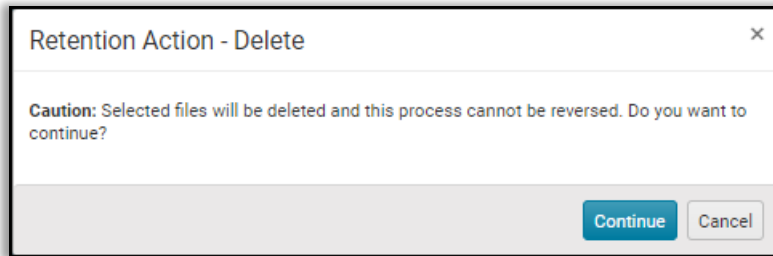
Delete

Archive and Delete

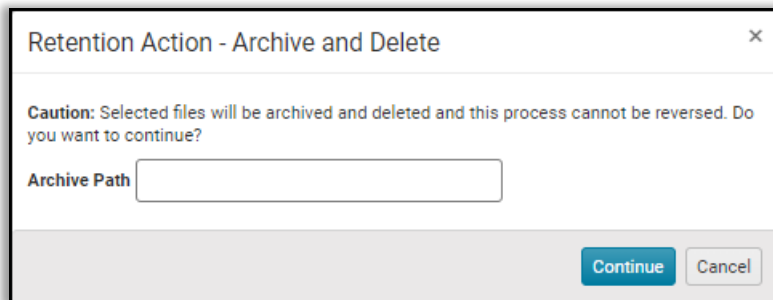
-  **Archive** – select file(s) from the search results that you would like to archive from iChannel. Archive file(s) are removed from iChannel, yet the client will provide an Archive “path” to store a copy of the file.



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



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



-  **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	<u>7</u>	Archive	Completed	1/19/2021	ADMINISTRATOR USER	0 s	1	0
2	<u>8</u>	Archive	Completed	1/19/2021	ADMINISTRATOR USER	0 s	1	0
3	<u>9</u>	Delete	Completed	1/21/2021	ADMINISTRATOR USER	0 s	1	0
4	<u>10</u>	Archive	Completed	1/21/2021	ADMINISTRATOR USER	0 s	1	0
5	<u>11</u>	Delete	Completed	2/3/2021	ADMINISTRATOR USER	0 s	1	0
6	<u>12</u>	Delete	Completed	2/9/2021	Zone Admin	0 s	2	0
7	<u>13</u>	Archive	Completed	2/23/2021	ADMINISTRATOR USER	1 s	0	1
8	<u>14</u>	Archive & Delete	Completed	3/31/2021	Zone Admin	0 s	1	0
9	<u>15</u>	Delete	Completed	5/7/2021	Bobby Underwood	0 s	1	0
10	<u>16</u>	Delete	Completed	5/7/2021	Bobby Underwood	0 s	1	0
11	<u>17</u>	Delete	Completed	5/7/2021	Bobby Underwood	11 s	39	5

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