




## iChannel File Management Client File Area IC-200

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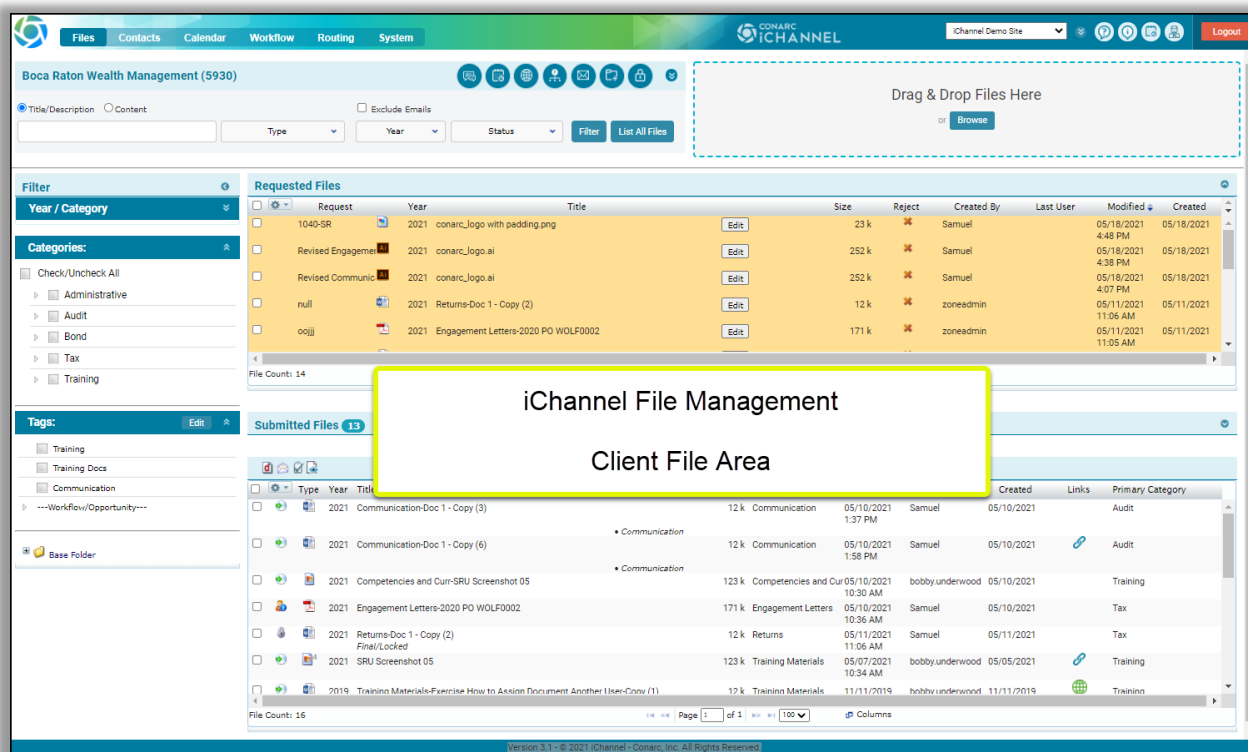
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## iChannel File Management – Client File Area

 iChannel provides a single point of management from which users can view and access files 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 files in their native file format 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 files with history tracking.



**iChannel File Management**  
**Client File Area**

Request	Year	Title	Size	Reject	Created By	Last User	Modified	Created
1040-SR	2021	conarc_logo with padding.png	23 k	✖	Samuel		05/18/2021 4:48 PM	05/18/2021
Revised Engagemen	2021	conarc_logo.ai	252 k	✖	Samuel		05/18/2021 4:38 PM	05/18/2021
Revised Communic	2021	conarc_logo.ai	252 k	✖	Samuel		05/18/2021 4:07 PM	05/18/2021
null	2021	Returns-Doc 1 - Copy (2)	12 k	✖	zoneadmin		05/11/2021 11:06 AM	05/11/2021
oojll	2021	Engagement Letters-2020 PO WOLF0002	171 k	✖	zoneadmin		05/11/2021 11:05 AM	05/11/2021

Type	Year	Title	Created	Links	Primary Category	
Communication	2021	Communication-Doc 1 - Copy (3)	05/10/2021 1:37 PM		Audit	
Communication	2021	Communication-Doc 1 - Copy (6)	05/10/2021 1:58 PM		Audit	
Communication	2021	Competencies and Cur	05/10/2021 10:30 AM	bobby.underwood	05/10/2021	Training
Communication	2021	Engagement Letters-2020 PO WOLF0002	05/10/2021 10:36 AM	Samuel	05/10/2021	Tax
Communication	2021	Returns-Doc 1 - Copy (2) Final/Locked	05/11/2021 11:06 AM	Samuel	05/11/2021	Tax
Communication	2021	SRU Screenshot 05	05/07/2021 10:34 AM	bobby.underwood	05/05/2021	Training
Communication	2019	Training Materials-Exercise How to Assign Document Another User-Copy (1)	11/11/2019	bobby.underwood	11/11/2019	Training

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#### [Gear Icon: Secure PDF's](#)

#### [Gear Icon: Copy Internal Link](#)

#### [Gear Icon: Check-Out | Undo Check-Out | Check-In](#)

#### [Gear Icon: Undo Check-Out](#)

#### [Gear Icon: Check-In](#)

#### [Gear Icon: Create Portal Request](#)

#### [Gear Icon: Assign To](#)

#### [Gear Icon: Move | Rename | Copy](#)

#### [Gear Icon: Rollover](#)

#### [Gear Icon: Re-Categorize](#)

#### [Gear Icon: Publish and Link](#)

#### [Gear Icon: Publish Only](#)

#### [Gear Icon: Link Only](#)

#### [Gear Icon: Unpublish / Unlink](#)

#### [Gear Icon: Copy to Folder \(Append\)](#)

#### [Gear Icon: Copy to Folder \(Replace\)](#)

#### [Gear Icon: Mark for Deletion](#)

#### [Gear Icon: Delete](#)



### File Management (File) Search – Global Search

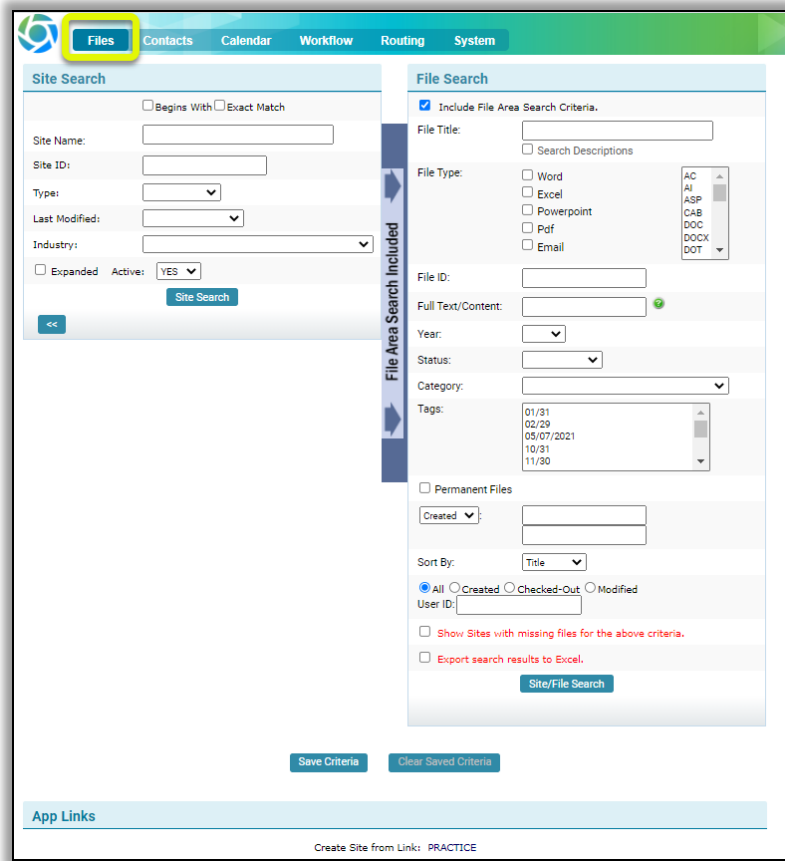
From the iChannel Dashboard Banner, select the **Files** link to open the File Management Area Search screen. The File Management Area Search and File Search features let you look for clients by defining client filter options and allows you to search for files by defining file filter options. iChannel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

The File Management Area Search screen also allows the combination of client filter options with the file 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: File Management Area (File) Search – Global Search

#### Action

From the iChannel Dashboard Banner, *select* the **Files** link. The **File Area Search | File Search** screen will display.



### File 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 File Management Area
  - *Click* on the **Email icon** to go to the client’s Email Area

Search Results								Search Listing		
Name	Company	Type	FEIN	Partner	Group	Entity	Manager	Biller Tax ID	Modified	Contact
Adams Systems, Inc	Client		ADAMS09	ADAMS09					01/17/2019 09:09 PM	1
Admired Transportation, Inc	Client		ADMIR-1	ADMIR-1	3	1		JB	01/17/2019 09:08 PM	1
Advanced Insurance Underwriters	Client		ADUI-323	ADUI-323					01/17/2019 09:08 PM	1

## File Search

- **Filter Options** – allows you to search files across Sites. Enter any information you have about the files.
  - Entering a name or partial name will list any files 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 file quickly.
- **File Title** – *enter* at least **three letters of the file name** you are wanting to search.
- **File Type** – *place* a **check** in any **File Type** options to limit your search by file type. *Hold down* the **ctrl key** and *using your mouse* to make multiple selections in the additional types field.
- **File ID** – every file in iChannel is assigned an ID which is stored in the file properties.
- **Full Text | Content** – Enter text in this field triggers a “full text search” of all the File 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 files 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/File Search** button. If you choose to not enter any filter options, all files that you have permission to view will be returned.

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

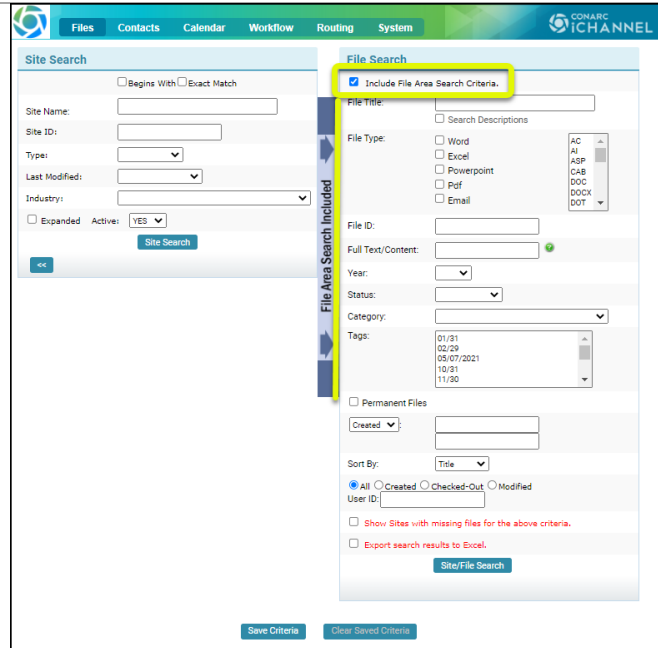
Year	File Name	Site Name	User	File Size	Date
2019	2019 Advanced User Training	Shelby's Bridge Thrift Shop	bobby.underwood	232 KB	08/26/2019
2019	2019 August iChannel Release Notes v2_20_0	SRU Training Test(SRU Training)	bobby.underwood	1,134 KB	08/07/2019
2019	2019 Basic User Training Agenda	Browns Family Company Inc(BROWN07)	Imagby	194 KB	10/21/2019
2019	2019 Basic User Training Agenda	Shelby's Bridge Thrift Shop	bobby.underwood	194 KB	07/31/2019
2019	2019 Basic User Training Agenda-Merged	Browns Family Company Inc(BROWN07)	Imagby	445 KB	10/21/2019

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

## Include File Area Search Criteria

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

- The  indicator will display.



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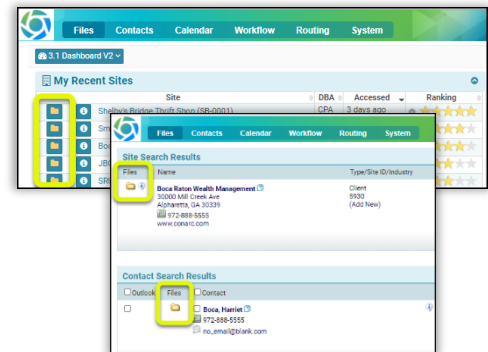
### File Management Area Overview



A **Central File Repository** or **File Management Area** houses all the files that a user will access in iChannel. The File 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 File 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 File 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.

The screenshot displays the iChannel File Management interface for 'Boca Raton Wealth Management (5930)'. The interface is divided into several sections:


- Header | Filter Bar:** Located at the top, it includes navigation tabs (Files, Contacts, Calendar, Workflow, Routing, System), a search bar with 'boca' entered, and a 'Logout' button. Below the navigation is a filter bar with options for 'Title/Description' and 'Content', and a 'Type' dropdown.
- Client File Area:** The main central area, divided into 'Requested Files' and 'Submitted Files'. The 'Requested Files' table lists files with columns for Request, Year, Title, Size, Reject, Created By, Last User, Modified, and Created. The 'Submitted Files' table lists files with columns for Type, Year, Title, Size, Secondary Category, Modified, Created By, Created, Links, and Primary Category.
- Filter Primary and Secondary Category:** A sidebar on the left contains a 'Filter' section with 'Year / Category' and 'Categories' (Administrative, Audit, Bond, Tax, Training). Below this is a 'Tags' section with 'Training' and 'Training Docs'.

Request	Year	Title	Size	Reject	Created By	Last User	Modified	Created
1040-SR	2021	conarc_logo-with padding.png	23 k	✗	Samuel		05/18/2021 4:48 PM	05/18/2021
Revised Engagemen	2021	conarc_logo.ai	252 k	✗	Samuel		05/18/2021 4:38 PM	05/18/2021
Revised Communic	2021	conarc_logo.ai	252 k	✗	Samuel		05/18/2021 4:07 PM	05/18/2021
null	2021	Returns-Doc 1 - Copy (2)	12 k	✗	zoneadmin		05/11/2021 11:06 AM	05/11/2021
oojj	2021	Engagement Letters-2020 PO WOLF0002	171 k	✗	zoneadmin		05/11/2021 11:05 AM	05/11/2021
Revised Communic	2021	Communication-Doc 1 - Copy (3)	12 k	✗	bobby.underwood		05/11/2021 11:05 AM	05/11/2021

Type	Year	Title	Size	Secondary Category	Modified	Created By	Created	Links	Primary Category
2021	2021	Communication-Doc 1 - Copy (3)	12 k	Communication	05/10/2021 1:37 PM	Samuel	05/10/2021		Audit
2021	2021	Communication-Doc 1 - Copy (6)	12 k	Communication	05/10/2021 1:37 PM	Samuel	05/10/2021		Audit
2021	2021	Competencies and Curr-SRU Screenshot 05	123 k	Competencies and Cur	05/10/2021 10:30 AM	bobby.underwood	05/10/2021		Training
2021	2021	Engagement Letters-2020 PO WOLF0002	171 k	Engagement Letters	05/10/2021 10:36 AM	Samuel	05/10/2021		Tax
2021	2021	Returns-Doc 1 - Copy (2) Final/Locked	12 k	Returns	05/11/2021 11:06 AM	Samuel	05/11/2021		Tax
2021	2021	SRU Screenshot 05	123 k	Training Materials	05/07/2021 10:34 AM	bobby.underwood	05/05/2021		Training
2019	2019	Training Materials-Exercise How to Assign Document Another User-Copy (1)	12 k	Training Materials	11/11/2019 11:11/2019	bobby.underwood	11/11/2019		Training

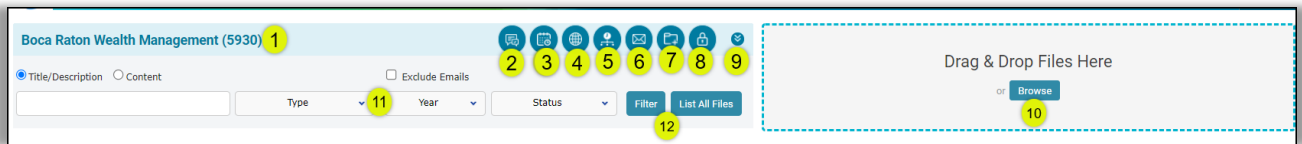


 File Management Area Overview – iChannel File Header | Filter Bar

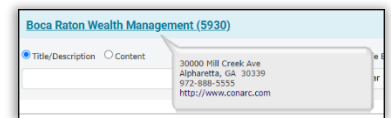
The **iChannel File Header | Filter Bar** provides the users with the ability to set-up unique filter options to quickly find file(s) associated with a Site. To search, enter as much or as little in any of the filter options then click  button to return your results in the File Listing section.

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

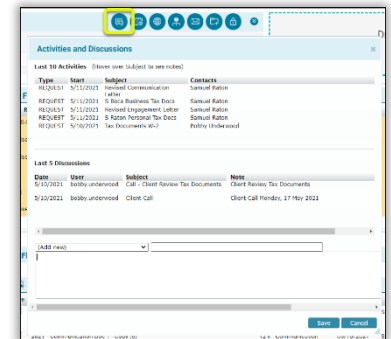
**Overview: iChannel Header | Filter Bar**  
Action



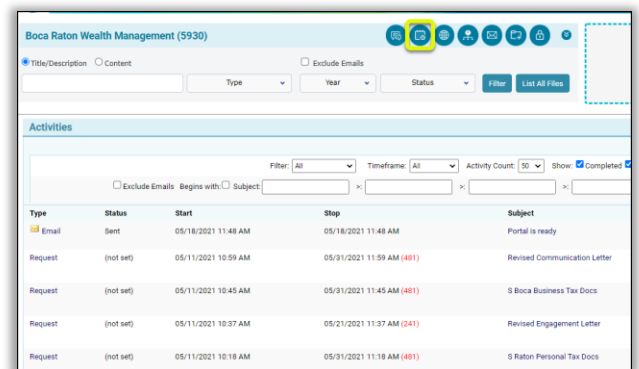
1. **Site Name** – displays the name of the Site accessed from any folder icon. *Hover* over the name to view the **Contact Information**. *Click* on the **Site Name** to go to the Site Detail (CRM) module.



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

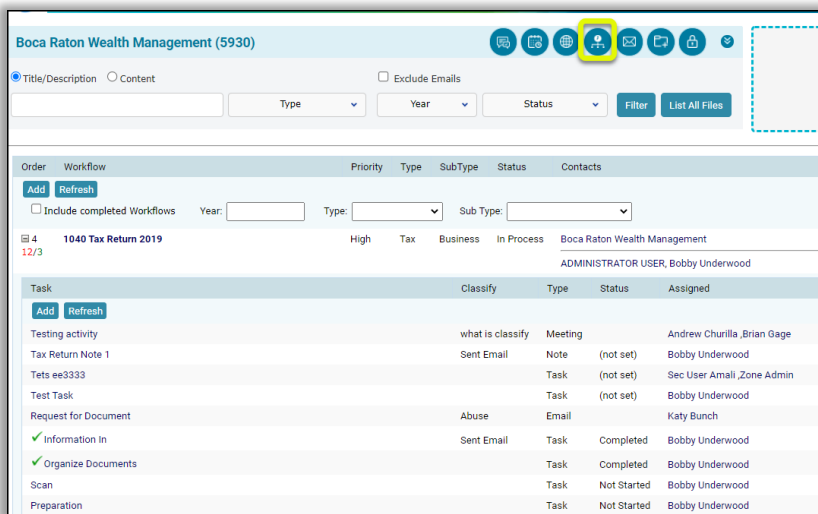


3. **Show Activities Icon** – *click* the **Calendar Icon** to load the Activities screen for activities associated with the Site.

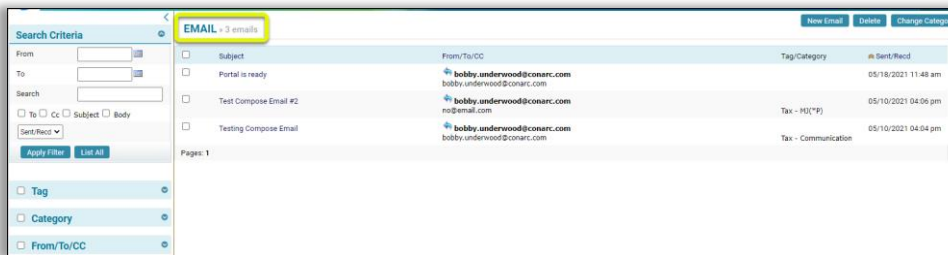


4. **Last Portal Login** – hover to see the last login in on the portal.

5. **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.*

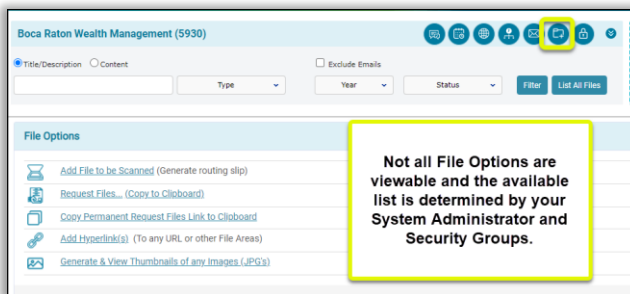


6. **IC Email Icon** – *click the Mailbox Icon to open the Email screen. Emails that have been forward will appear in the email section. From this screen, you can: Search Emails, Create, Delete Emails, Change Category, Change Site Code, Attach to a Workflow for emails.*

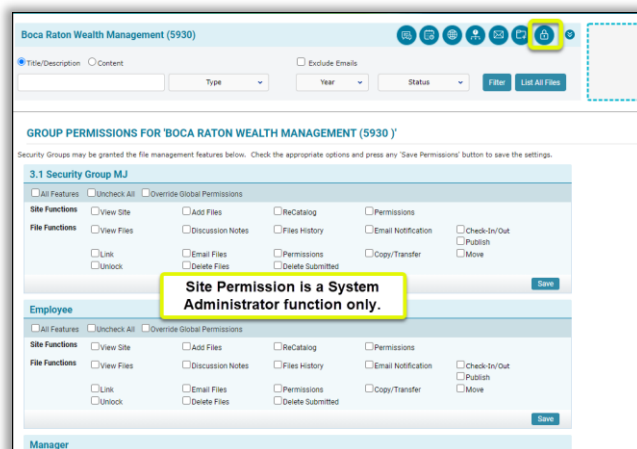


7. **File Options** – *click the Folder Icon to access an additional option to add new files into iChannel. From this screen you can:*

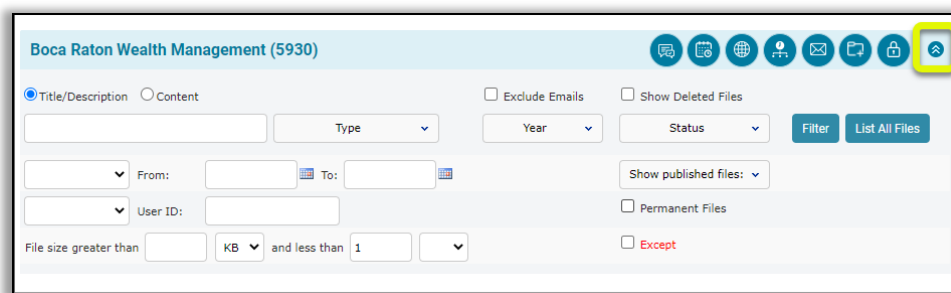
- Add File to be Scanned (generate routing slip)
- Request Files (Copy to Clipboard)
- Copy Permanent Request Files Link to Clipboard
- Add Hyperlink(s) (to any URL or other File Area)
- Recatalog (Rebuild the file area)
- Generate & View Thumbnails of any Images (JPG's)



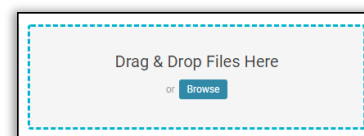
8. **Pad Lock Icon:** Site Permission – The **Lock Icon** is controlled by your System IT Administrator and Security Group and is typically for iChannel Administrator. *Click the lock icon* to customize the security settings for this Site.



9. **“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.*



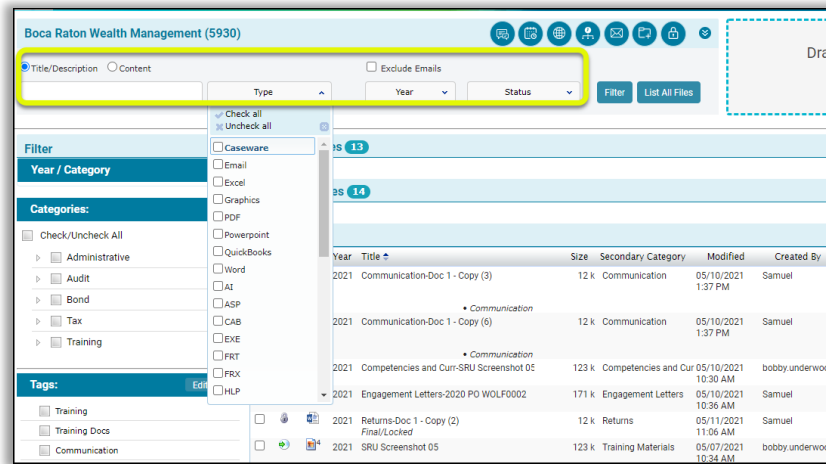
10. **Drag & Drop Files Here/Browse** – to quickly add a File to the File Listing area, *click the Browse button* to add a file from your computer. In addition, you can quickly *drag-and-drop* a file by dragging into the file area.



- *Click the **Browse** button* or Drag-and-drop a file 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 File(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 file.*
    - All files are required to be assigned to a Topic | Subtopic Category
  - **Target Subfolder:**
    - If the subfolder of the file being added needs to be updated, *select the **Target Subfolder drop-down**.*

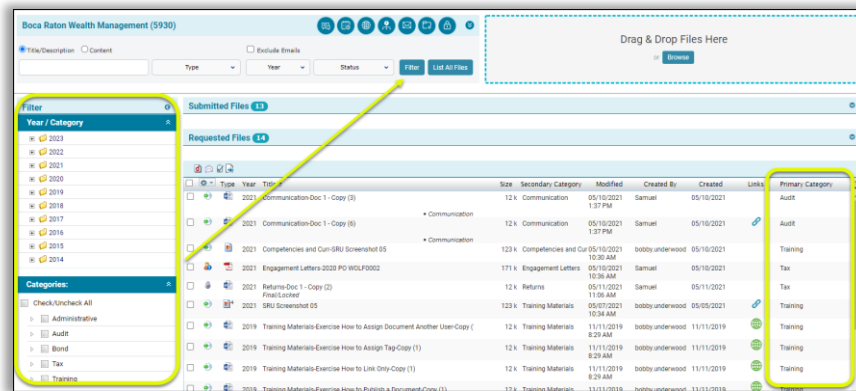
11. **Title/Description/Content field – Type drop-down** – to easily search for a file by either Title/Description or Content. Enter at least a **MIN of 3 characters** to start the search. Click “Enter” or click the **Filter** button to return your results.

**Type | Year | Status Search filters** – click the **Type drop-down arrow** to select or multi-select the type of file 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.



12. **Filter List All** - click the **Filter** button to search for file(s) based solely on your defined search options. Click the **List All** button to search for “all” files 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 files that match your criteria.

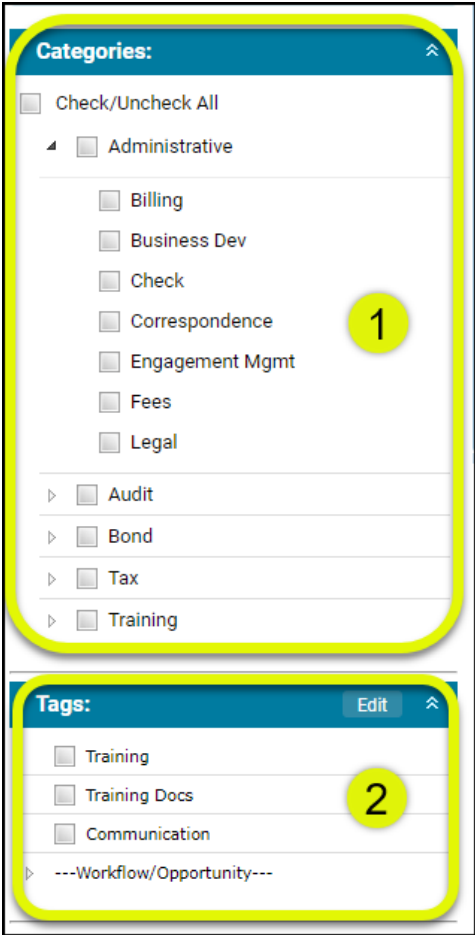


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iChannel /File Management Area Overview – iChannel Filter Primary | Secondary Category

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

Overview: iChannel Filter Primary | Secondary Category
Action



- 1. Filter: Categories – there are no limits to the number of Primary | Secondary Categories. Yet, all Primary Categories must have at least one (1) Secondary 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 file management.
- Examples of Primary Category Filters are listed below but not limited to:
o Administrative, Audit, Data Analysis, Engagement, Litigation, Tax
- Examples of Secondary Category Filters are listed below but not limited to:
o Billing, Business Development, Correspondence, Engagement Letter, Legal, Notices, Returns, Workpapers
2. Filter: Tags – tags are custom for each Site’s File Management Area and can be arranged in a multi-level tier. The top level is called the Topic File Tag and the lower level is called the Subtopic File Tag. Tags provide the user an optional identifier to assign to a file beyond the Primary | Secondary Category.
- Tags can also be used in your iChannel File Header | Filter Bar search options to assist with quickly finding file(s) for a Site.

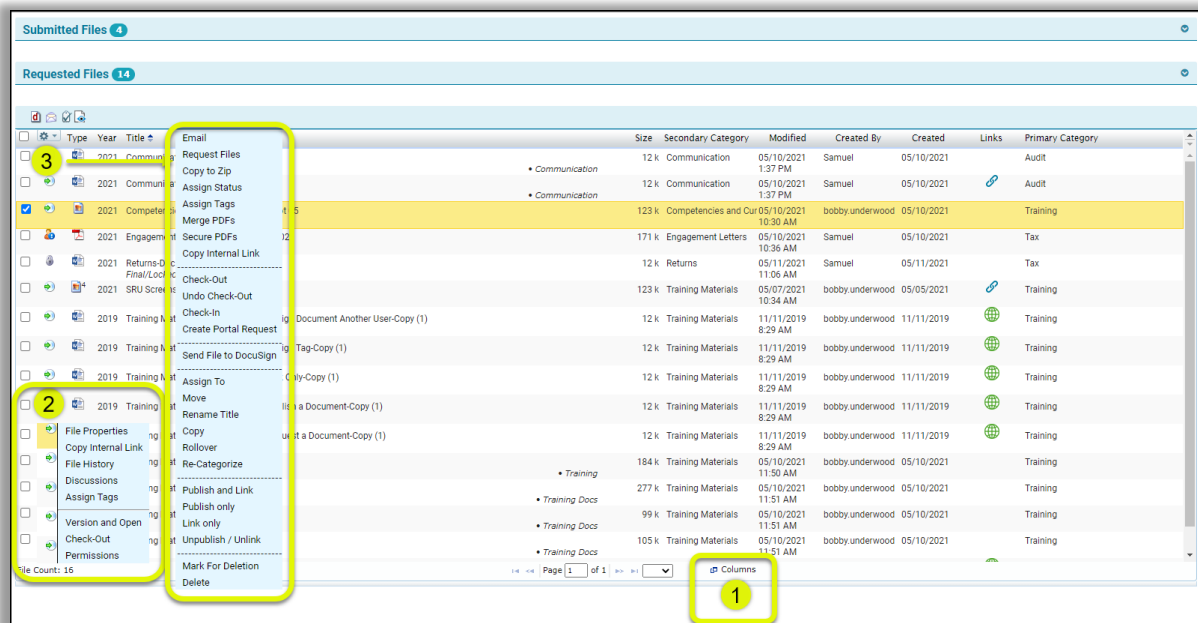
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## iChannel File Management Area Overview – File Listing

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

To assist with easily viewing and finding your files, 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:

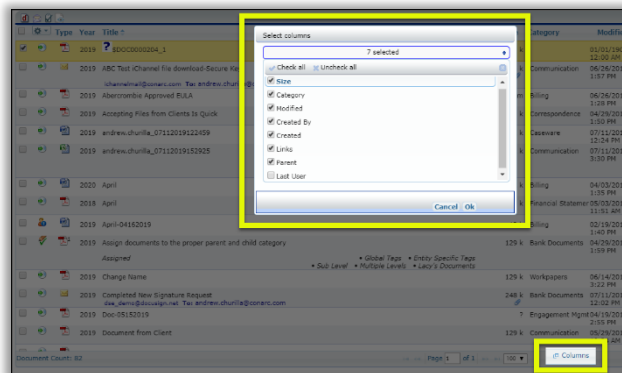
1. File Listing Column feature
2. File Feature(s) – Action icon
3. Multiple File Feature(s) – Gear Icon

## iChannel File management Area Overview: Column Feature

### Overview: iChannel File Listing Column Feature

#### Action

- 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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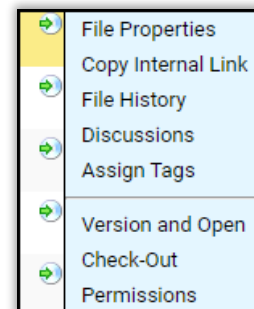
## iChannel File Management Area Overview: Action Icons

### Overview: Action Icon

#### Action

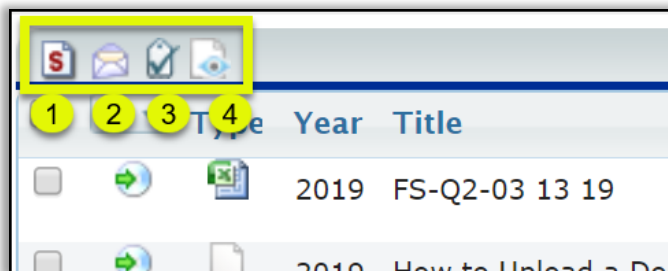
**File Feature(s) – Action Icon** – iChannel provides several features to view additional information about a file that is in the iChannel File Listing area. *Click* the **Action** icon provides the following options per file:

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



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## iChannel File Management Area Overview: File Listing – Icons

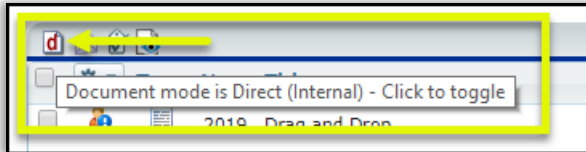


### 1. File Listing Icon: Direct Editing | Stream Mode Editing | Off-line Editing

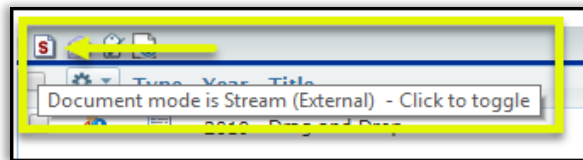
iChannel supports two (2) modes when editing files.

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

The mode you are working in determines how you edit file(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



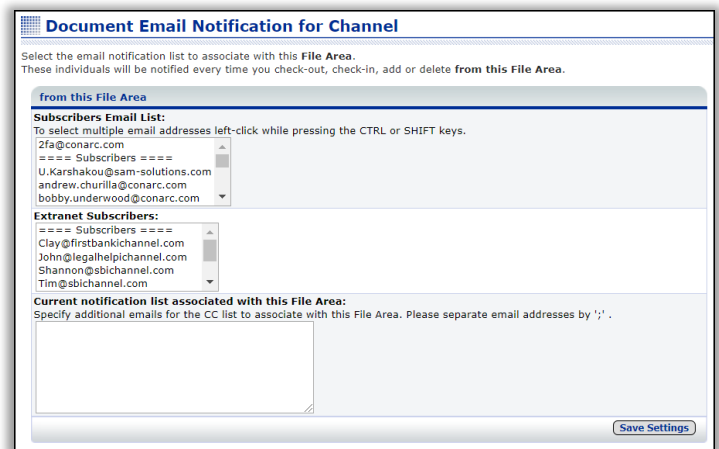
File mode is **Direct (Internal)**



File mode is **Stream (External)**

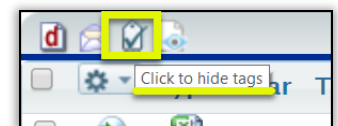
## 2. File Listing Icon: File Email Notification for iChannel

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 files. This icon performs as toggle switches to either **Hide** or **Show** Tags in the File Listing area.

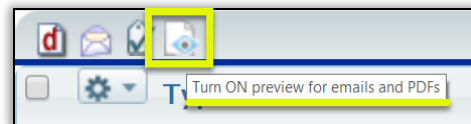




#### 4. File Listing Icon: Turn ON preview for Emails and PDFs

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**.

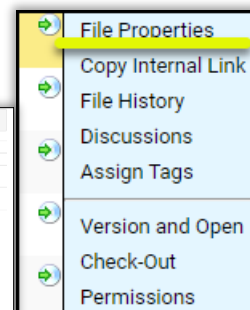
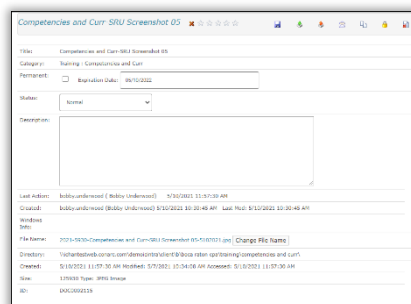


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#### File Feature: File Properties

##### Action Icon – File Properties

Step	Action
	<p>Hover over the <b>Action</b>  icon, the action list will display. Click <b>File Properties</b>.</p> <p>The <b>File Properties</b> window will display.</p>



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 file will now appear on your Dashboard under My Files.
- **Status** – *click* the **drop-down arrow** to change the status of the file.
- **Description (optional)** – *enter* **Description** notes.
- **Last Action** – time stamp and user that made any file change(s).
- **Created** – the user that created the file (created date) and the Last Modify date.
- **File Name** – the current name of the file is listed. *Click* **Rename** button to update the file name.
- **Directory** – identifies where the file is listed in the client file folder.

### [File Management Table of Contents](#)

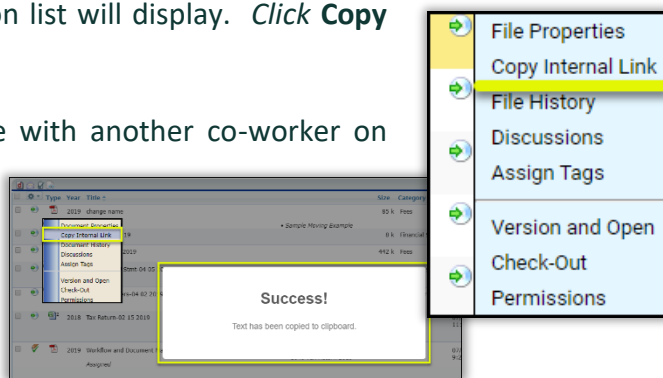
 File Feature: Copy Internal Link

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 file(s) and where that co-worker doesn't have access to your File Listing to view the file(s). Use the Copy Internal Link to copy the file 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 file(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.

 File Feature: File History

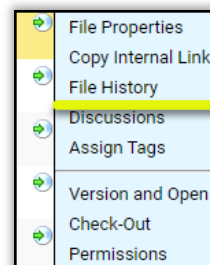
Action Icon – File History

Step	Action
------	--------

 Hover over the **Action**  icon, the action list will display. Click **File History**.

iChannel logs “all” actions (history) for every file in the File History summary.

Competencies and Curr-SRU Screenshot 05	
Created on:	5/10/2021 10:30:45 AM
Created by:	bobby.underwood
Last modified:	5/10/2021 10:30:45 AM
File name:	2021-5930-Competencies and Curr-SRU Screenshot 05-5102021.jpg
Directory:	\\ichantestweb.conarc.com\demo\intra\client\b\boca raton cpa\training\competencies and curr\
Size:	125930 bytes
Type:	JPG
ID:	DOC0002115
File History	
Filter by Action:	<input type="text" value=""/>
Accepted Submitted File:	5/10/2021 11:57:30 AM - bobby.underwood (Bobby Underwood)
Details:	N/A
Submitted File:	5/10/2021 10:30:45 AM - bobby.underwood (Bobby Underwood)
Details:	N/A



The history logs follow all actions for each file 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 file 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 primary | secondary category published to the iChannel Portal.
- **Unpublished** – removes the published files from the client portal.
- **Category | Year Changed** – includes any previous values associated with the file.
- **Status Change** – includes the previous file status and any changes to the file status by a user.
- **PDF Merge** – any .pdf files where a user has merged the, will be listed in the history to show what and when files were merged.

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## File Feature: Discussions

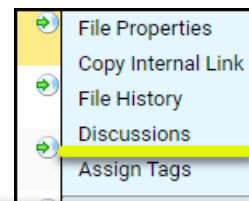
### Action Icon – Discussions

Step	Action
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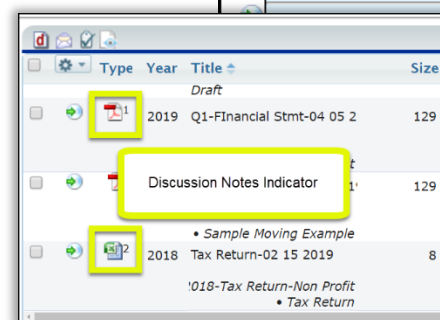


Ability to collaboration with clients and co-workers with regards to files is one of the most time-saving features. **Discussion Notes** create a blog like discussion for files that can be posted or emailed.

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

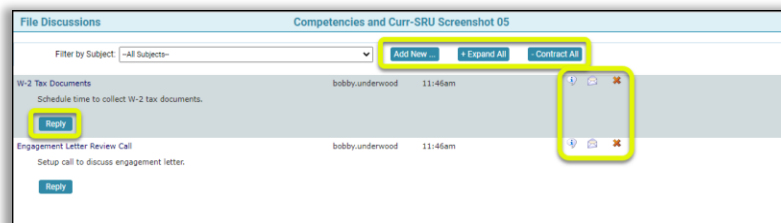


- Files with Discussion Notes have a **number to the right** of the File's Icon to denote the number of conversations posted.

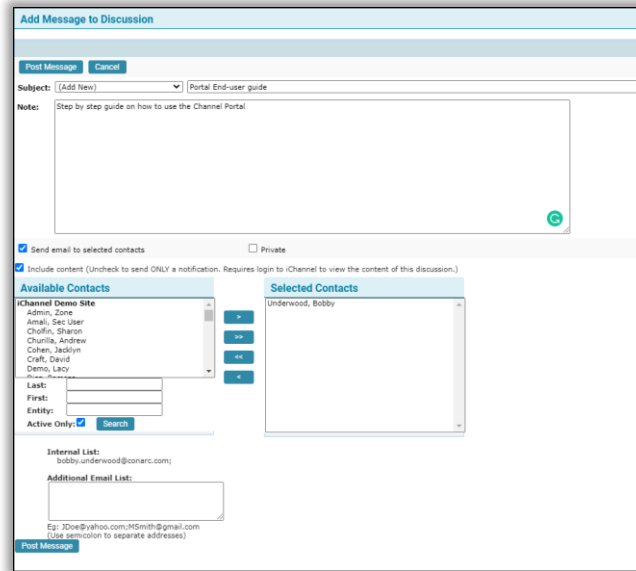


2. The **File Discussion & Notes** window opens. From here you can also open the file for viewing.

- If notes have not been posted, select **Add New ...** button.
- If there are *existing notes*, additional notes can be added. Additionally you can add a new note, delete a note, filter notes, or print the discussion list.
  - It is **not recommended to delete notes** as they can be searched as part of the File History.



3. Click **Add New ...** or select a **Subject** from the *drop-down list*, if available. This list is specific to each file.
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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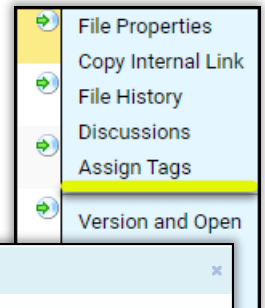
File Feature: Assign Tags

Action Icon – Assign Tags

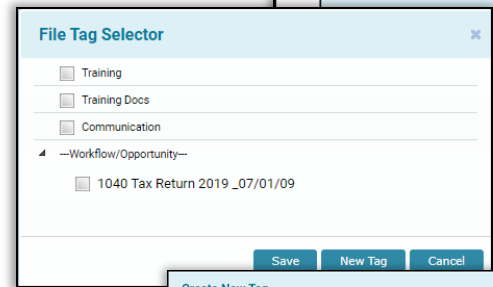
**Step**    **Action**

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

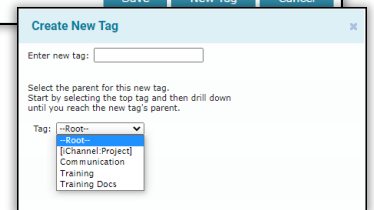
1. Hover over the **Action** icon, the action list will display. Click **Assign Tags**.



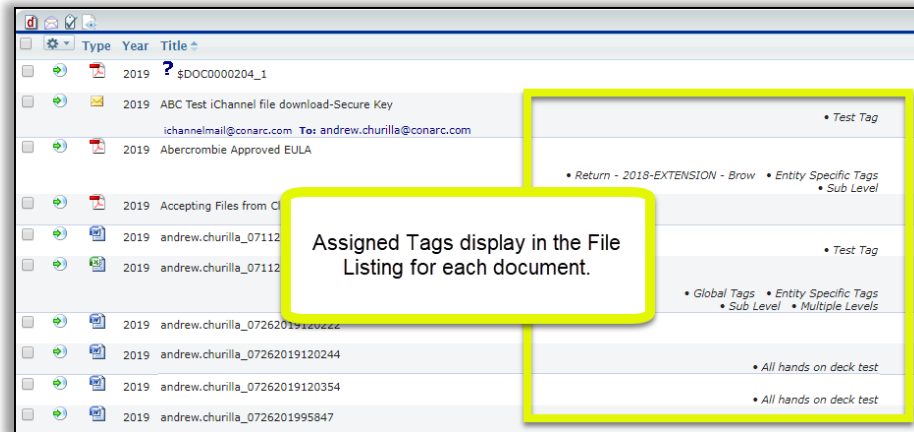
2. The **File Tag Selector** window box opens.  
 3. To assign a tag, *select Tag* checkbox.  
 4. To remove a tag, *deselect Tag* checkbox.



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.**



File

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File Feature: Version and Open

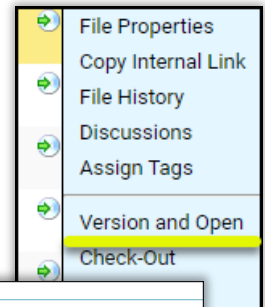
Action Icon – Version and Open

Step	Action
------	--------

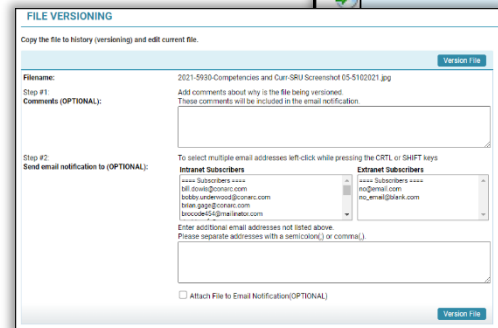


Versioning is the process in iChannel that allows for making a back-up-copy of the file before users begin to make any changes to the file. When a user creates a version, the current file is copied and placed in the file history as a hyperlink with the version “#”.

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

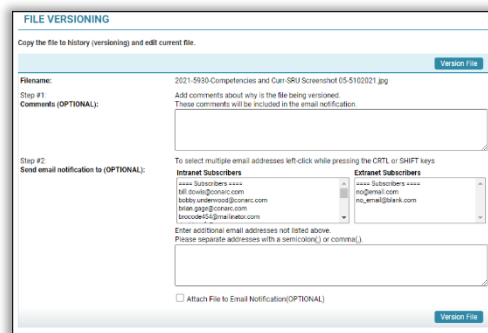


1. The **File Versioning** window box opens.
2. To version a file, click the **Version File** button. The following message will display. Next, **click the Click Here link** to open the file. Make any necessary changes to the file at this time.




Document has been versioned. **--Click Here--** to open the document in direct mode. Note, this will open the original document and not a copy. You must be connected to the network to open a document in direct mode.

3. Additionally, to create a version of a file, following these steps:
  - a. In the **Step #1: Comments (OPTIONAL):** field, *enter comments*. Comments entered are saved to the File 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 File to Email Notification (OPTIONAL)* to notify the file is being versioned.
  - d. *Click Version File* button.



4. To view the **Prior Version** of the file, *access the File History*.

**Versioned:** 07/29/2019 12:07 PM bobby.underwood(Bobby Underwood)  
**Details:** Received, need final review  
**Filename:** 2019-SB-0001-Financial Statements-Q1-Financial Stmt-04 05 2019-6242019.pdf  
**Version #2** \$DOC0000349\_2.pdf **Open** **Restore**

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

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### File Feature: Off-Line Editing

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


 File Feature: Check-Out

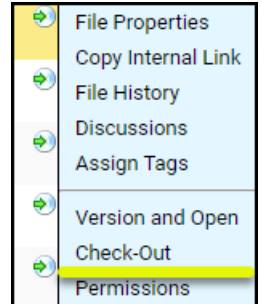
Action Icon – Check-Out

Step	Action
------	--------

 Checking out a file is a vital function when working in today’s mobile workforce. Files are checked-out and a copy of that file is saved locally (or where the users determines best to save the file). When a file is **checked-out**, the file 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 file.

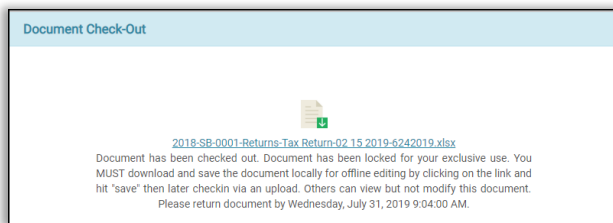
Hover over the **Action**  icon, the action list will display. **Click Check-Out.**






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

3. Click  to check-out the file without defined any Check-Out Options.



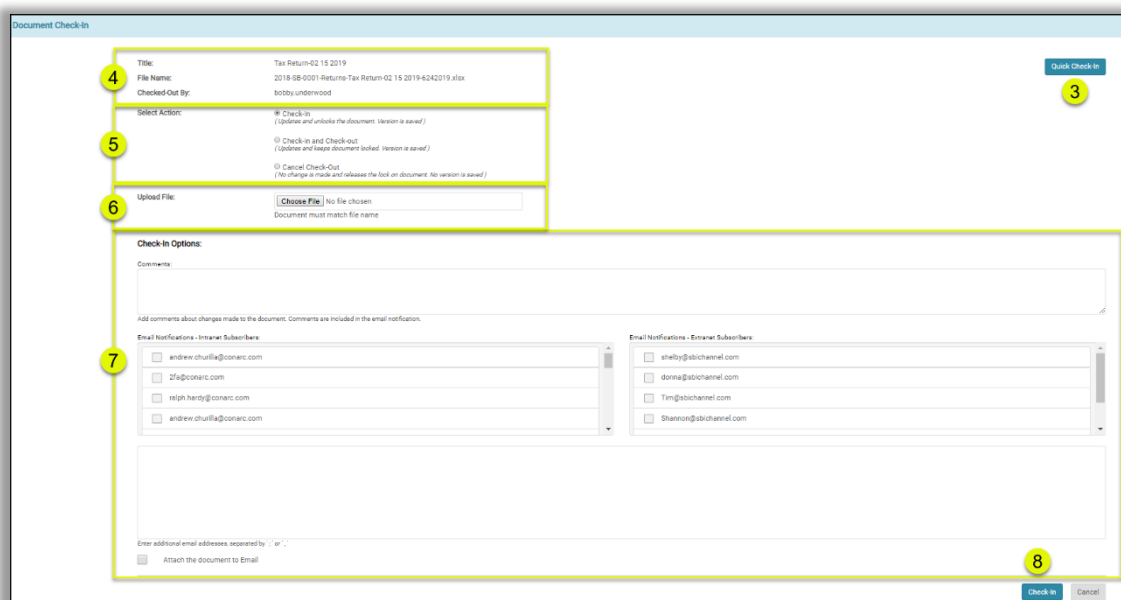


4. In the **File selected for check-out** section, the file(s) to be checked-out will display.
5. In the **Check-out Options** section:
  - a. (Optional) Check the **Get Zip** checkbox if you want to *Create a zip file containing the checked-put file(s)*.
  - b. (Optional) Check Out Information, *enter a Return Date, enter a Return Time*. These field define when the expectation for the file to be check-in.
  - c. (Optional) *Enter Comments* about what you will do with the file while it is checked-out. Comments are included in the email notification and will be saved in the file 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 file to Email** checkbox if you would like to attach the file(s) to the email.
6. Click  to check-out the file(s). The  icon will update to  to indicate the file(s) have been checked-out.

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 File Feature: Check-In

Action Icon – Check-Out

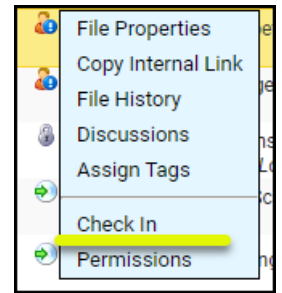


**Step Action**



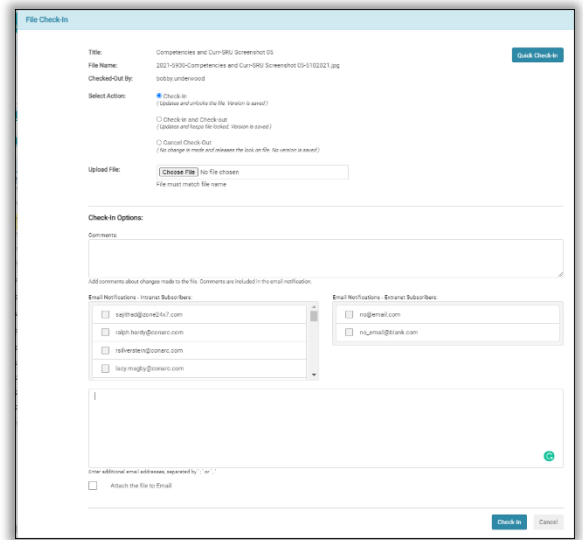
When a user has finished making changes and or updates to the Checked-Out file(s), users will want to Check-In the file in iChannel.

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



The **Check-In** window box opens.

3. Click to check-in the file without defining any Check-In Options.
4. The **Title**, **File Name** and **Checked-Out By** are pre-populated with information about the Checked-Out file.
5. In the **Section Action**, select one of the following:
  - a. **Check-In** – Updates and unlocks the file. Version is saved and File History is updated.
  - b. **Check-In and Check-out** – Updates and keeps the file locked. Version is saved and File History is updated.
  - c. **Cancel Check-out** – No change is made and releases the lock on the file. No version is saved.
6. **Upload File** - click the to locate the file. *The File **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 File while it is checked-out. Comments are included in the email notification and will be saved in the file 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 file to Email** checkbox if you would like to attach the file(s) to the email.
8. Click to check-in the file(s). The icon will update to to indicate the file(s) have been checked in.



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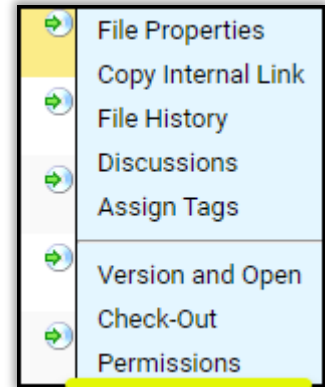
 File Feature: Permissions

Action Icon – Permissions

Step	Action
------	--------

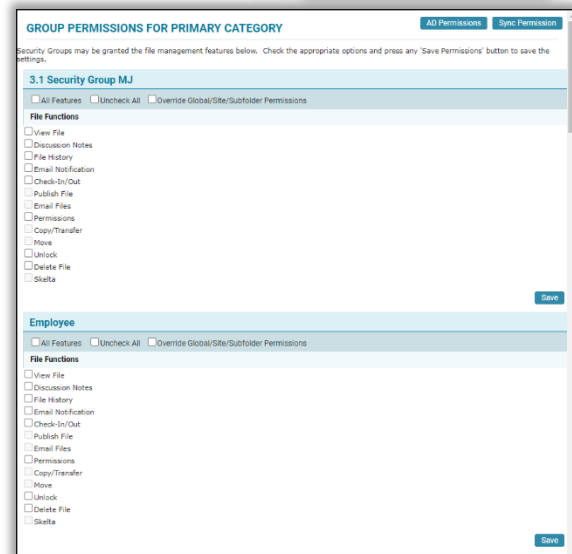
 All file(s) held in iChannel are controlled by **Group Permissions**. A list of Security Permissions by Group and Features:

- All features
- View File
- Discussion Notes
- File History
- Email Notification
- Check-In/Out
- Publish File
- Email Files
- Permissions
- Copy/Transfer
- Move
- Unlock
- Delete File



Your organization will determine your Security Permission by Group and Features. Therefore, certain Group Permissions for File(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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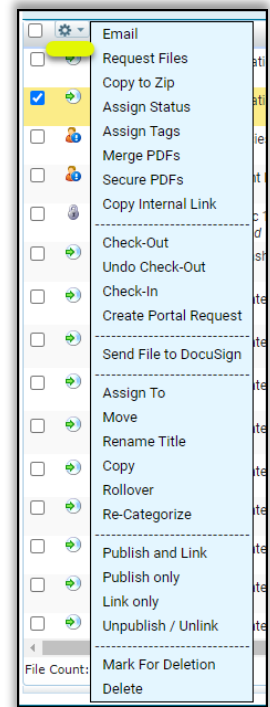
## iChannel File Management Features

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



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

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



## File Feature: Email

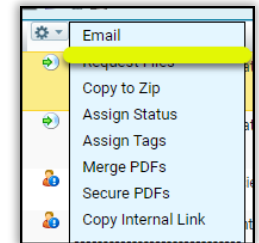
### Gear Icon – Email

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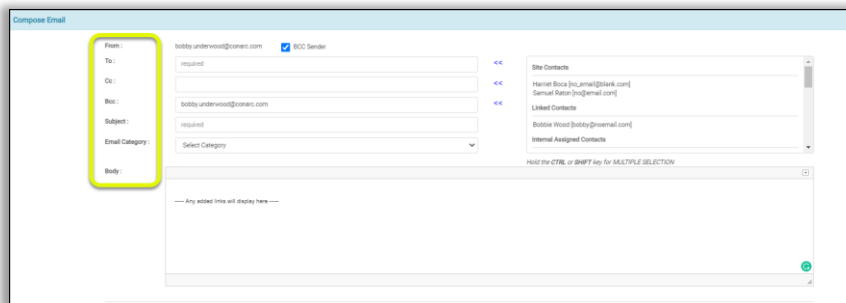
Select a **file(s)** from the File Listing area. *Hover over the Gear icon, the action list will display. Click **Email**.*

The **Compose Email** window will display.

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

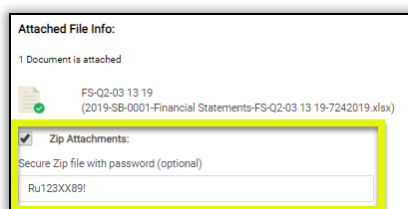


- **From:** - *by default*, the sender's email address will be displayed. The **BCC Sender** checkbox *will be checked by default*. If you do not want to receive a copy of the email in your company Email Inbox, *deselect this option*.
- **To | Cc | Bcc:** – from the **Client Contacts** section, *select contacts* to send the file 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 Primary | Secondary 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 files as a secure link, **do not remove** the “---File Links will display here---”

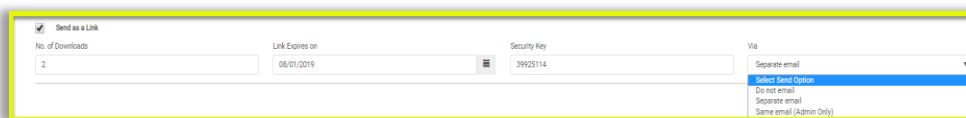


**Attached File Info:** - there are two (2) options when attaching and sending an email:

- **Zip Attachments:** - if checked, the file 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.



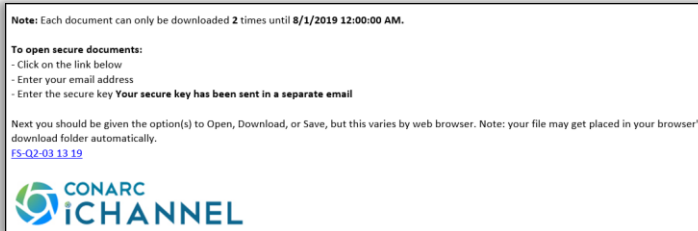
- **Send as a Link** – if checked, the file will be sent as a link. Additional security options that you can apply:
  - **No. of Downloads** – the *default* number is **2**. If you want to allow more or less downloads, update the field.
  - **Link Expires on** – *click* the **calendar icon** to change 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  , 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 file email. *Click* the [File Link](#) in the email.



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




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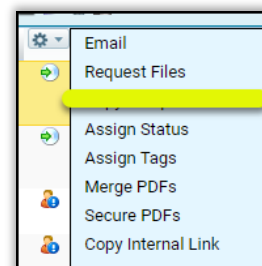
## File Feature: Request Docs

### Gear Icon – Request Docs

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

Select a **file(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.

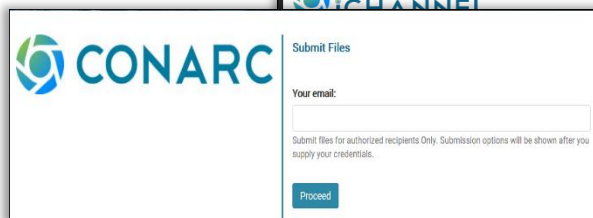
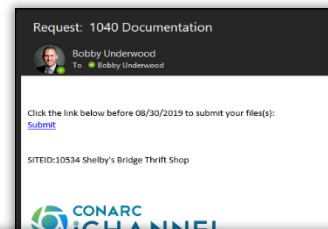
Depending on your **Security Group** permissions, a few available actions are:




- **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 file 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 files as a secure link, **do not remove** the “---File Links will display here---”
- Expires – *enter an expiration date* for Request Docs request to be active.

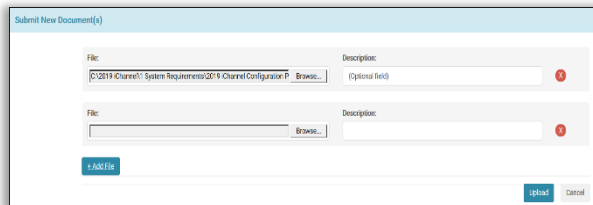
- Click  , the **Email Send Status** will display.

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 .




The Submit New File(s) window displays. *Click*  to **upload a file**. *Click*  to **add additional files**. *Click*  to **upload all file(s)**.

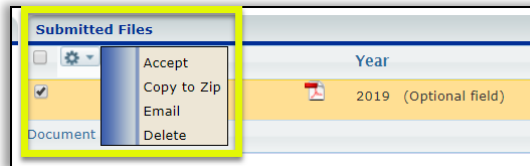


Once the recipient has uploaded the file(s), the file(s) will appear in the *Client File Listing area* in the **Submitted Files** section (highlighted yellow).

Submitted Files									
Order	Year	Title	Size	Delete	Created By	Last User	Modified	Created	
<input type="checkbox"/>	Tax Documents	2021	Exercise How to Assign Document Another User - Copy (13).docx	12 k		Samuel	05/18/2021 3:07 PM	05/18/2021	
<input type="checkbox"/>	Personal Tax Documents	2021	Doc 1 - Copy (5).docx	12 k		Samuel	05/10/2021 1:37 PM	05/10/2021	
<input type="checkbox"/>	Personal Tax Documents	2021	Doc 3 - Copy (6).docx	12 k		Samuel	05/10/2021 12:30 PM	05/10/2021	
<input type="checkbox"/>		2021	2019 Ichannel Training Agenda_WOLF.docx	175 k		Samuel	05/10/2021 10:40 AM	05/10/2021	

File Count: 4      Page 1 of 1      100

To accept the file(s), *check* the **checkbox** next to the File(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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File Feature: Copy to Zip

Gear Icon – Copy to Zip

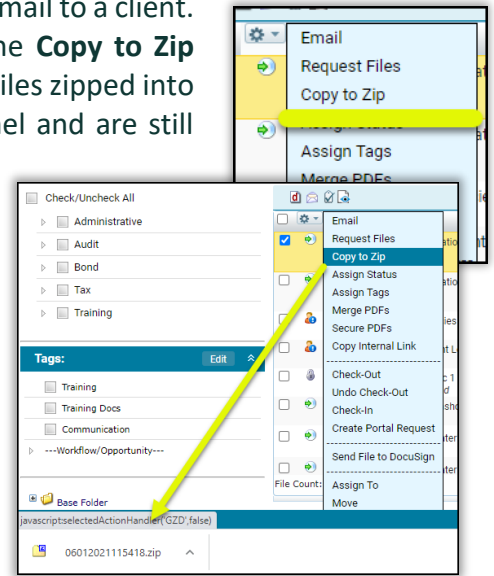
Step	Action
------	--------

 There are times you might want to send several files 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 files zipped into a compressed file. The original file(s) remain in iChannel and are still accessible to others.

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

The file(s) will be compressed into a Zip file. Once the file(s) are zipped, you can send using your company email system.


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File Feature: Assign Status

Gear Icon – Assign Status

Step	Action
------	--------

 To update the status of a file or multiple files at once, use the **Assign Status** feature. Ability to change a file status is controlled by your Security Group Permissions set by your System IT Administrator.

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

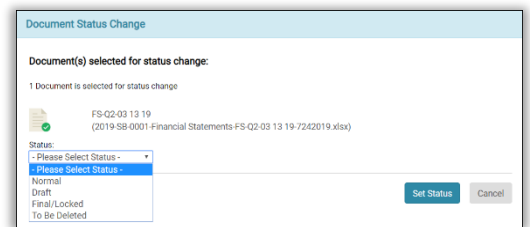
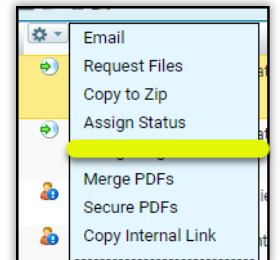
The **File Status Change** window will display.

If the status can be changed, the file icon will display with a **“green check mark”**.

If the status cannot be changed, the file icon will display with a **“red X”**.


Click  to update the status on the file(s).

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 File Feature: Assign Tags

Review  [iChannel File Management Area Overview – iChannel Filter Topic | Subtopic Category](#) section to learn more about Tags.

**Gear Icon – Assign Tags**

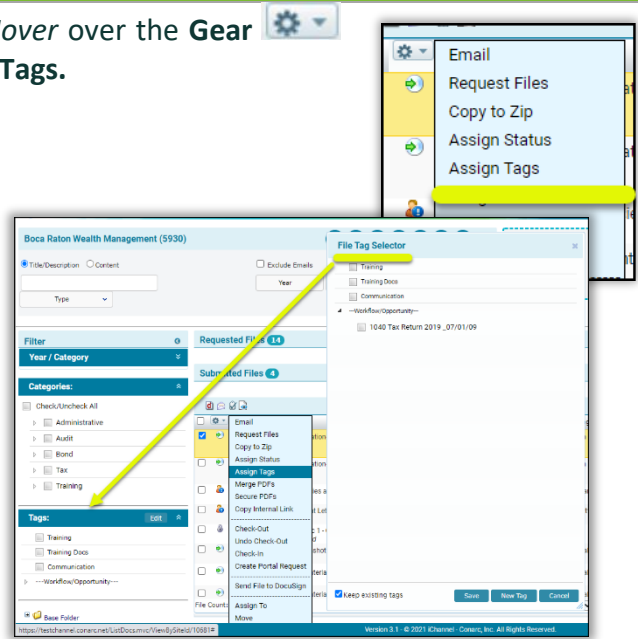
Step	Action
------	--------

	Select a <b>file(s)</b> from the File Listing area. <i>Hover</i> over the <b>Gear</b>  icon, the action list will display. <b>Click Assign Tags</b> .
---	--

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

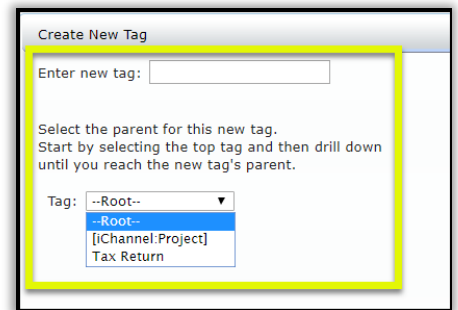
If the file(s) needs to be assigned (Tag) to a Project, *expand* the **Project Opportunity** arrow and *select* a **Workflow** from the list.

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



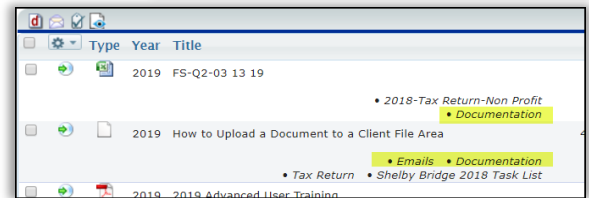
To create a new tag, *select* **New Tag**. The **Create New Tag** window display.

- *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 file.

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## File Feature: Merge PDFs



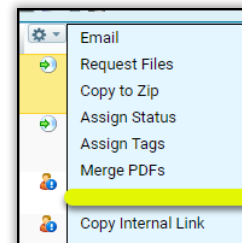
iChannel **PDF Merge** feature will not merge any PDFs files that have any type of security or passwords set on the files.

### Gear Icon – Merge PDFs

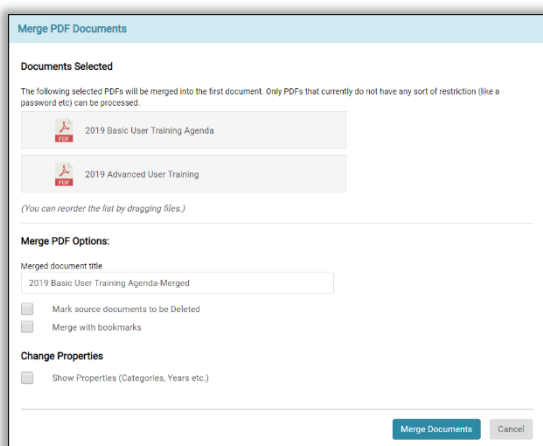
Step	Action
------	--------



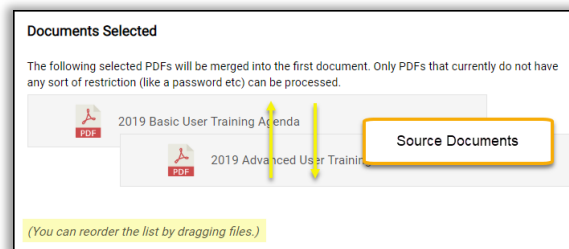
Select a file(s) from the File Listing area. Hover over the Gear icon, the action list will display. Click **Merge PDFs**.



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



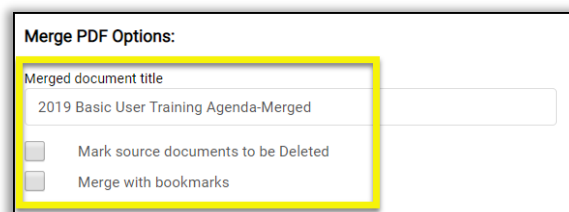
- In the **Files Selected** area, the file(s) you



selected (source files) to merge will display.

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

- In the **Merge PDF Options** area the new merge file will display and the word **“Merge”** will be added to the file title. To *update* the name, if necessary, *click* in the title field and update.
  - **Mark source files to be Deleted** – if the merged files (source files) are no longer needed in iChannel, *check* **Mark source files to be Deleted**. iChannel will mark the files for deletion. If you wish to keep the source files in iChannel, then leave this checkbox, **unchecked**.
  - **Merge with bookmarks** – if the merged files (source files) have bookmarks and you would like to merge the files and maintain your bookmarks, *check* **Merge with bookmarks**.

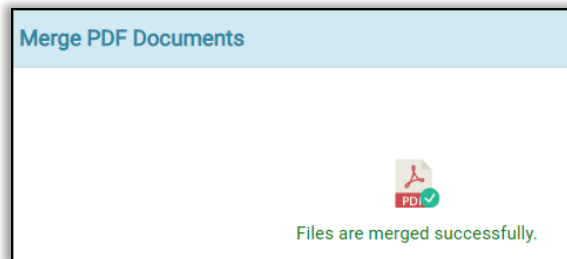
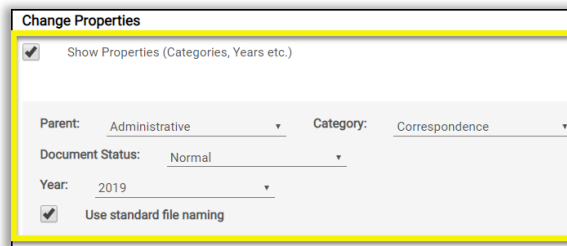


- To update any properties associated with the merged file, check **Show Properties (Categories, Years, etc.)** checkbox.

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

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

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### File Feature: Secure PDFs

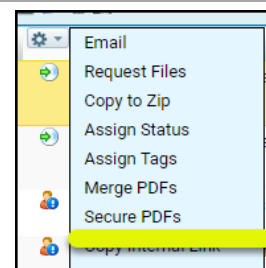
There are circumstances where file(s) are sensitive and before a user's or client can view or open the file, you want to provide an additional layer of security (encryption).

#### Gear Icon – Secure PDFs

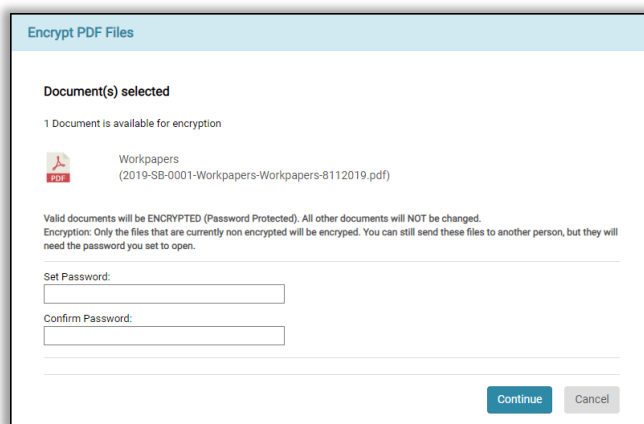
Step	Action
------	--------



Select a file(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 files will be **ENCRYPTED** (Password Protected). All other files 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 file.

- In the **Set Password** field, *enter a password*. There is no criteria to set a password.. area, the files(s) you selected (source files) 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 file(s) is Encrypted, to open the file the user will need to *enter the password* in the **Password required** field.
- Click **Submit**.


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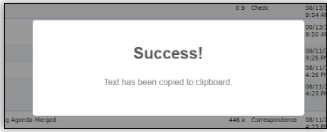
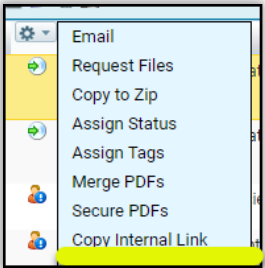
### File Feature: Copy Internal Link

There are circumstances where a user would like to share a file(s) in the File Area with another internal user(s), but not all file(s) in your File area. The **Copy Internal Link** feature will let you share out file(s) by making a copy of the file(s) where you can share out the file(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 file(s) reside and will only have access to those file(s) identified in the Copy Internal Link.

#### Gear Icon – Copy Internal Link

Step	Action
	<p>Select a <b>file(s)</b> from the File Listing area. <i>Hover over the Gear icon</i>, the action list will display. <i>Click Copy Internal Link</i>.</p> <p>The <b>Success! Text has been copied the clipboard</b> window will display.</p>


to


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## File Feature: Check-Out | Undo Check-Out | Check-In

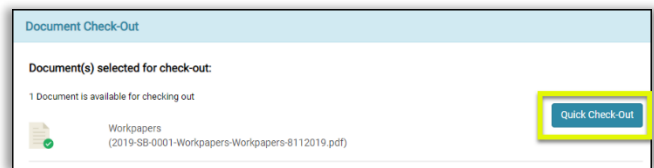
- **Check-Out** – user(s) need the ability to quickly access file(s) to share with other user(s) or client(s). It's key to working in today's face paced mobile environments.
  - When the file(s) is **Checked-Out**, the file(s) will be *set to read-only*. User(s) are required to download and save the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

### Gear Icon – Check-Out



Step	Action
	<p>Select a <b>file(s)</b> from the File Listing area. <i>Hover</i> over the <b>Gear</b> , the action list will display. <i>Click</i> <b>Check-Out</b>.</p> <p>The <b>File Check-Out</b> window will display.</p> <div style="text-align: right; border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Check-Out</p> <p>Undo Check-Out</p> <p>Check-In</p> <p>-----</p> <p>Create Portal Request</p> <p>-----</p> <p>Send File to DocuSign</p> </div> <div style="text-align: center; margin-top: 20px;"> </div> <p style="text-align: center; color: #0070C0;"><a href="#">File Management Table of Contents</a></p>

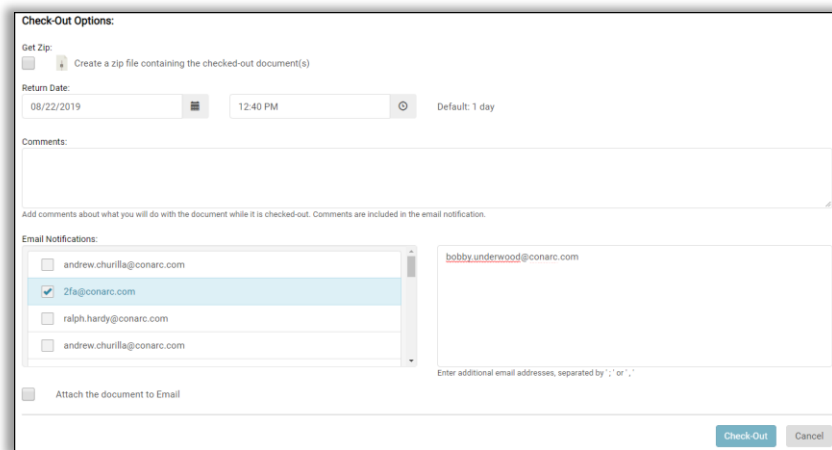
#### Quick Check-Out

iChannel also provides user(s) the option to do a **Quick Check-Out**. The Quick Check-Out feature will quickly check-out the file(s) without setting an additional Check-Out Options.





Check-Out Options:

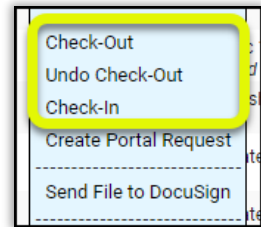
- In the **Check-out Options** section:
  - (Optional) Check the **Get Zip** checkbox if you want to *Create a zip file containing the checked-out file(s)*.
  - (Optional) Check Out Information, *enter a Return Date, enter a Return Time*. These fields define when the expectation for the file to be checked-in.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

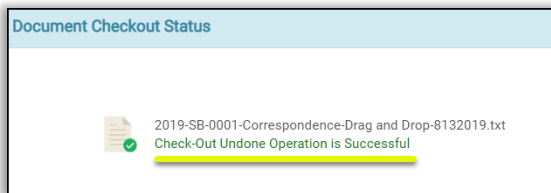


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**Gear Icon – Undo Check-Out**

Step	Action
	<p>Select a <b>file(s)</b> from the File Listing area. <i>Hover</i> over the <b>Gear</b>  icon, the action list will display. Click <b>Undo Check-Out</b>.</p> <p>The <b>File Checkout Status</b> window will display.</p>





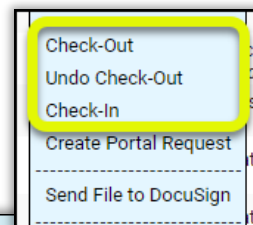


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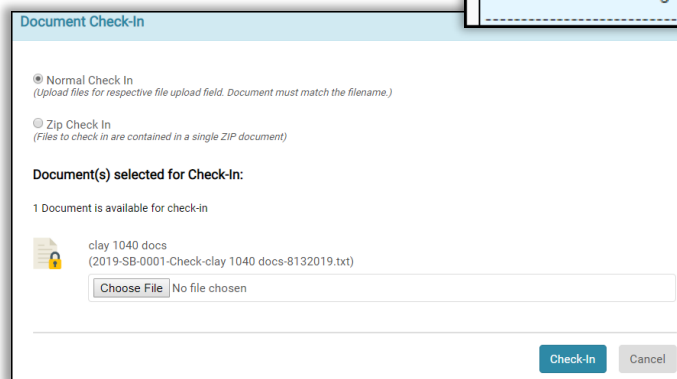
### Gear Icon – Check-In

Step	Action
------	--------

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



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

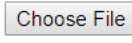





- **Normal Check In** – to recheck-in the file that was checked-out, *select **Normal Check-In** option.*
- **Zip Check In** – file(s) to check in are contained in a single file.



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

Document(s) selected for Check-In:

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



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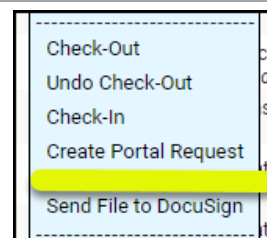
 **File Feature: Create Portal Request**

The Create Portal Request allows the user to make a request for file(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 file(s).

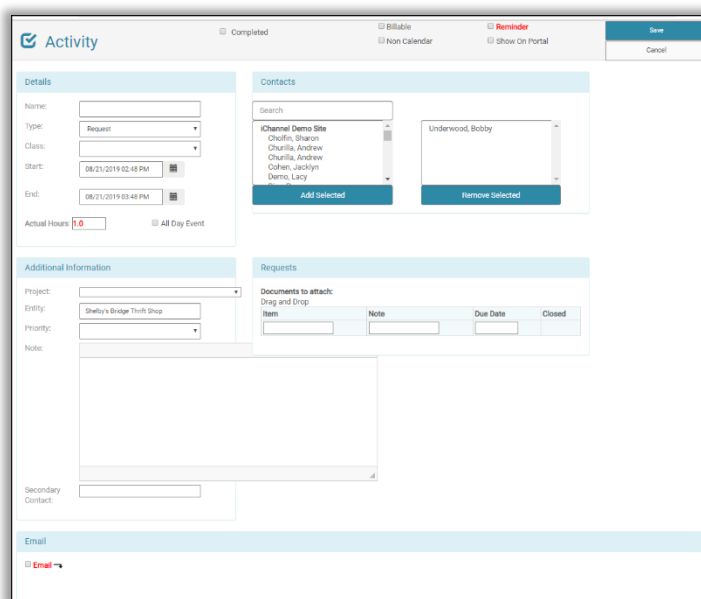
**Gear Icon – Create Portal Request**

**Step Action**

 *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**

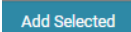

- **Project** – if requested file(s) are part of a project, select the **Project** from the drop-down list.
- **Entity** – by default, the Entity will pre-populate with the entity name. If you need to change the entity, select the **Entity** drop-down list.
- **(Optional) Priority** – this optional field 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 
- Highlight a contact from the removed selected section, click 

**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 **Files to attach** section, the name of the file(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 file(s) is visible on the Portal.
- Click .


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 **File Feature: Assign To**

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

**Gear Icon – Assign To**

Step	Action
	<p>Select a <b>file(s)</b> from the File Listing area. <i>Hover</i> over the <b>Gear</b>  icon, the action list will display. Click <b>Assign To</b>.</p> <p>The <b>File Assign To</b> window will display.</p>






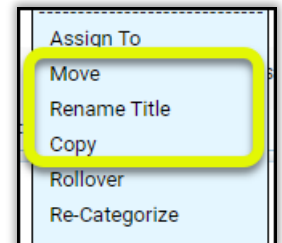
- **Select User/Group to Assign to:** drop-down list, *select* a **User/Group**.
- **Expiration Date** field (optional): use the date-picker icon to set an expiration date.
- To have a user notified when a file is completed, **check** the **Notify me when file is completed** checkbox.
- **Add Notes**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

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## File Feature: Move | Rename | Copy

User(s) have the ability to:

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



**Gear Icon – Move | Rename | Copy**

**Step**

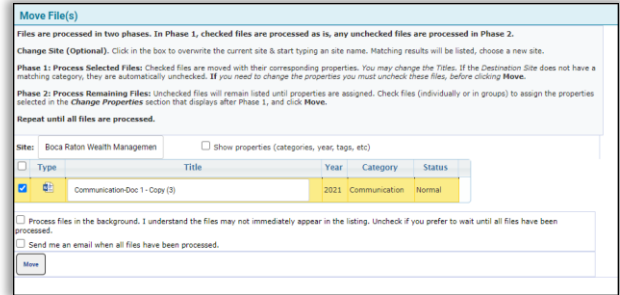
**Action**



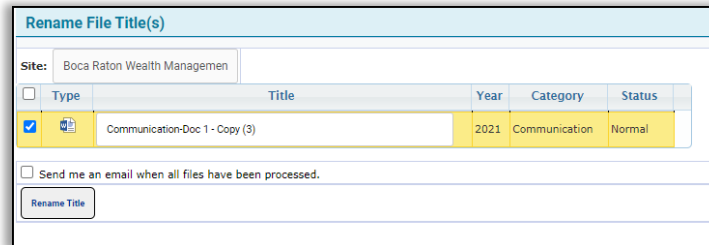
Select a **file(s)** from the File Listing area.

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 file 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 files.
- **Publish to Portal:** if the file 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**.
- **File Status:** if the status of the file needs to be updated, click the **drop-down list**.
- **File Tag:** to add a Tag or to assign the file to a Workflow, click the **“arrow”** to expand the **Tag | Workflow** list.
- **Click Move.**



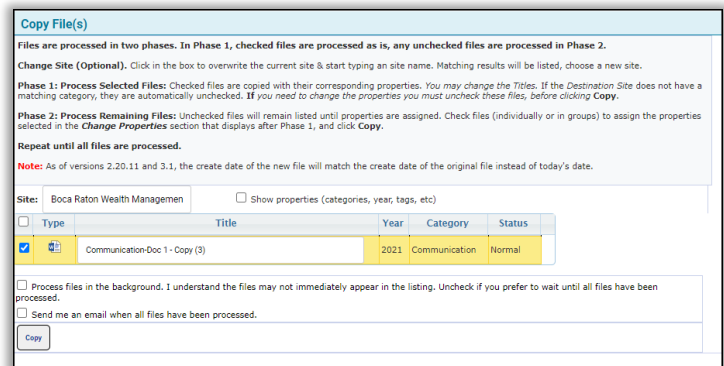
Select a **file(s)** from the File Listing area. Hover over the **Gear** icon, the action list will display. Click **Rename**.



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

Select a **file(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 file 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 files.
- **Publish to Portal:** if the file 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**.
- **File Status:** if the status of the file needs to be updated, *click* the **drop-down list**.
- **File Tag:** to add a Tag or to assign the file to a Workflow, *click* the **“arrow”** to expand the **Tag | Workflow** list.
- *Click Copy.*



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 **File Feature: Rollover**

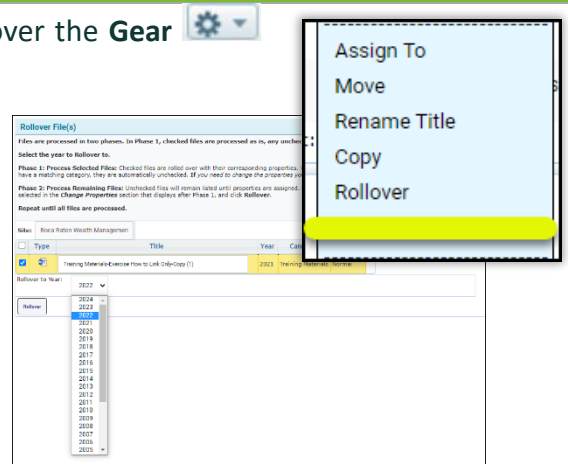
User(s) could have a file(s) where those file(s) will be used year-over-year with a client. The Rollover features allows the user to rollover (copy) a file(s) to another year. The file will be an exact copy of the original file(s) that is being rolled over.

**Gear Icon – Rollover**

Step	Action
------	--------

- |   |  |
|---|--|
|  | <p>Select a <b>file(s)</b> from the File Listing area. <i>Hover</i> over the <b>Gear</b>  icon, the action list will display. <i>Click Rollover.</i></p> <ul style="list-style-type: none"> <li>• <b>Entity:</b> <i>click</i> the <b>entity field</b> to search for a Entity. Enter at least three characters.</li> <li>• <b>Title:</b> if the file name needs to be updated, <i>click</i> the <b>Title</b> field and update.</li> <li>• <b>Rollover to Year:</b> <i>click</i> drop-down list and select a new year.</li> <li>• <i>Click Rollover.</i></li> </ul> |
|---|--|

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 **File Feature: Re-Categorize**

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

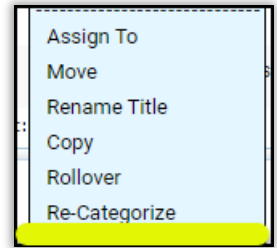
**Gear Icon – Re-Categorize**

Step	Action
------	--------



Select a file(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.**



Re-Categorize Files

File #1 - Communication-Doc 1 - Copy (3)

Primary Category:	Secondary Category:	Target Subfolder:
Administrative	Audit Workpapers	..
Audit	Casefiles	..Administrative\
Bond	Casefiles	..Administrative\billing\
Tax	Communication	..Administrative\business dev\
Training	Financial Statements	..Administrative\check\
	Research	..Administrative\correspondence\
	Special Reports	..Administrative\engagement mgmt\
	Work Programs	..Administrative\legal\
	Workpapers	..audit\
		..audit\audit workpapers\

Override Subfolder:

Title Description:  
Communication-Doc 1 - Copy (3)

Year: 2021  Permanent: Expiration: 1/1/9999

**Update**

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### File Feature: Publish and Link

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

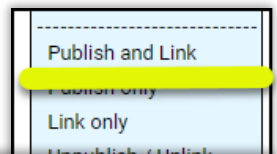
Clients (Portal Users) only have access to the file(s) you publish to the iChannel Portal from their respective File Area. Security Group Permission control what can be viewed on the Portal.

### Gear Icon – How to Publish and Link

Step	Action
------	--------



Select a file(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 file is available on the Portal.

- Notification:** - to send a notification to the Portal, *check* the checkbox **Send Extranet Notification Now**.

**Publish and Link** (The following document records will be Published and Linked)

**Publish/Link** **Cancel**

Title: WELCOME TO ICHANNEL KICKOFF CALL\_20190809\_1611      Expiration Date (optional): 09/23/2020

Notification:  Send Extranet Notification Now

File Area Search

Begins with:

Entity Name:

Login Site Name/Client ID:

Site Code:

Current Site Custom Fields:

Sort By:

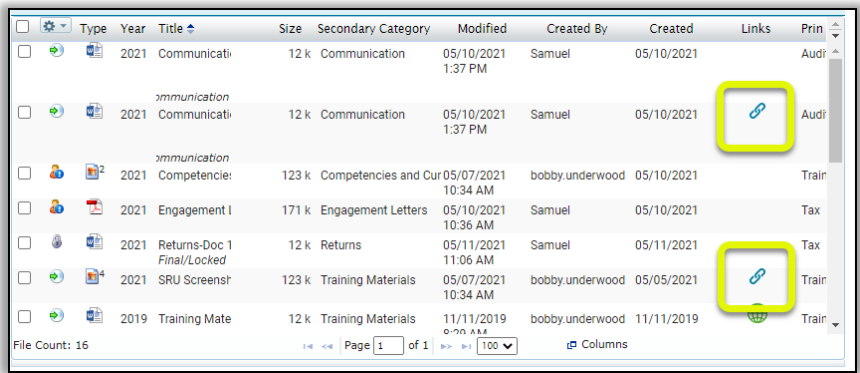
**Search**

- 🔍 **File Area Search** – next, in the File Area Search fields, *search* for the **Site** to which the file(s) should be linked to.
- 🔍 **Click** .
- 🔍 **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* .

The message will display.

**Published | Linked File(s) – Icon**

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





Type	Year	Title	Size	Secondary Category	Modified	Created By	Created	Links	Print
	2021	Communicati	12 k	Communication	05/10/2021 1:37 PM	Samuel	05/10/2021		Audi
	2021	Communicati	12 k	Communication	05/10/2021 1:37 PM	Samuel	05/10/2021		Audi
	2021	Competencie:	123 k	Competencies and Cur	05/07/2021 10:34 AM	bobby.underwood	05/10/2021		Train
	2021	Engagement I	171 k	Engagement Letters	05/10/2021 10:36 AM	Samuel	05/10/2021		Tax
	2021	Returns-Doc 1 Final/Locked	12 k	Returns	05/11/2021 11:06 AM	Samuel	05/11/2021		Tax
	2021	SRU Screensr	123 k	Training Materials	05/07/2021 10:34 AM	bobby.underwood	05/05/2021		Train
	2019	Training Mate	12 k	Training Materials	11/11/2019 8:00 AM	bobby.underwood	11/11/2019		Train

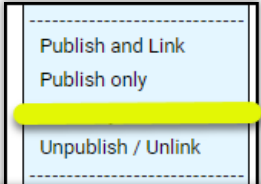
 File Feature: Publish Only

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





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

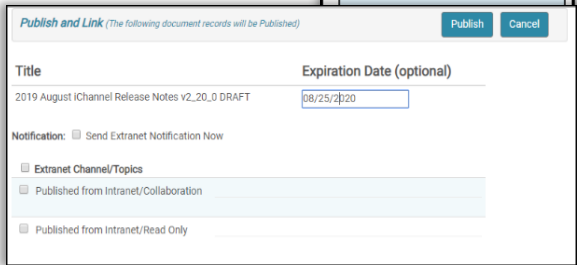
Step	Action
------	--------

	Select a <b>file(s)</b> from the <b>File Listing Area</b> . <i>Hover</i> over the <b>Gear</b>  icon, the action list will display. <i>Click</i> <b>Publish Only</b> .
---	--

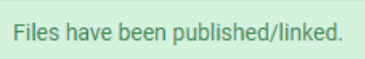


The **Publish and Link** window will display.

-  **Title** – the file(s) names will display.
-  **Expiration Date (Optional)** – this *optional field* allows you to set an expiration date. This date determines how long the Published file 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 file(s), *select* all **Topic | Subtopics** that apply.



















Click .

The  message will display.

**Published File(s) – Icon**

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


<input type="checkbox"/>		Type	Year	Title	Size	Secondary Category	Modified	Created By	Created	Links	Print
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
<input type="checkbox"/>			2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train

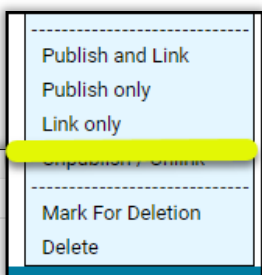
 File Feature: Link Only

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







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

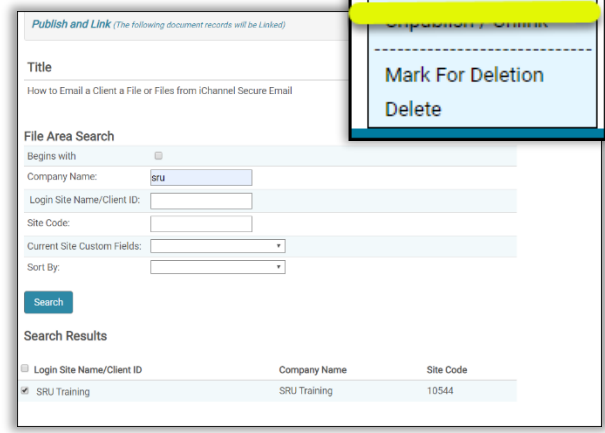
**Step Action**

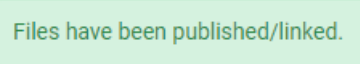
 Select a **file(s)** from the **File Listing Area**. Hover over the **Gear icon**, the action list will display. Click **Link Only**.



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

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














 Files have been published/linked.

The message will display.

**Published | Linked File(s) – Icon**

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

Type	Year	Title	Size	Secondary Category	Modified	Created By	Created	Links	Print
	2021	Communicati...	12 k	Communication	06/01/2021 12:21 PM	Samuel	05/10/2021		Audi...
	2021	Communication Competencie...	123 k	Competencies and Cur	05/07/2021 10:34 AM	bobby.underwood	05/10/2021		Train
	2021	Engagement L...	171 k	Engagement Letters	05/10/2021 10:36 AM	Samuel	05/10/2021		Tax
	2021	Returns-Doc 1 Final/Locked	12 k	Returns	05/11/2021 11:06 AM	Samuel	05/11/2021		Tax
	2021	SRU ScreensP...	123 k	Training Materials	05/07/2021 10:34 AM	bobby.underwood	05/05/2021		Train
	2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train
	2019	Training Mate	12 k	Training Materials	11/11/2019 8:29 AM	bobby.underwood	11/11/2019		Train



 **File Feature: Unpublish / Unlink File(s)**

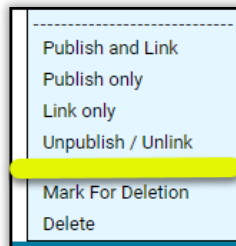
**Gear Icon – How to Unpublish File(s)**

**Step Action**





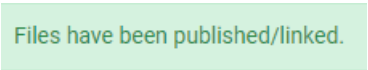
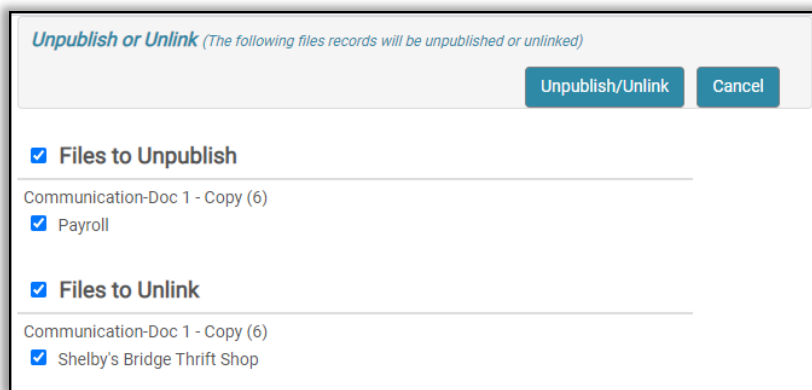
Select a **file(s)** that has the  icon from the **Entity File Area**. Hover over the **Gear**  icon, the action list will display. Click **Unpublish / Unlink**.



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

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

Click  
The



message will display.

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## File Feature: Copy to Folder (Append) | Copy to Folder (Replace)

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



#### 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 file(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 file(s) in this dedicated path will be deleted and then the selected file(s) are copied to the path so that a CD can be made of the destination folder.

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 **File Feature: Mark for Deletion**

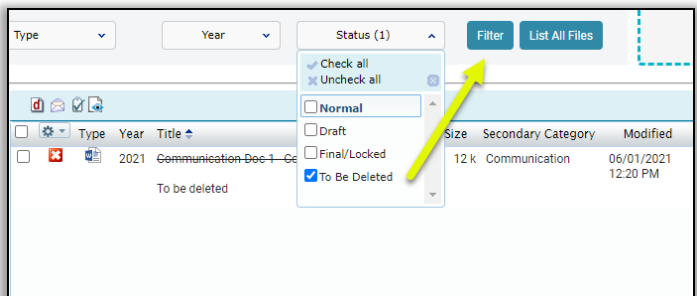
**Gear Icon – How to Mark for Deletion File(s)**

Step	Action
	<p>Select a file(s) from the <b>Entity File Area</b>. Hover over the <b>Gear</b>  icon, the action list will display. Click <b>Mark for Deletion</b>.</p> <div data-bbox="1263 562 1523 835" style="border: 1px solid black; padding: 5px;"> <p>Publish and Link Publish only Link only Unpublish / Unlink <b>Mark For Deletion</b></p> </div>
	<p>The <b>These files will be marked for deletion..</b> window will display.</p> <div data-bbox="722 682 1258 987" style="border: 1px solid black; padding: 5px;"> <p>These files will be marked for deletion...</p> <p>Communication-Doc 1 - Copy (3)</p> <p>Cancel Delete</p> </div> <p> Click <b>Delete File</b>.</p> <p> Click <b>OK</b>.</p>
	<p>The <b>Results</b> window will display.</p> <div data-bbox="941 1008 1510 1176" style="border: 1px solid black; padding: 5px;"> <p>ichannel.conarc.com says</p> <p>Are you sure?</p> <p>OK Cancel</p> </div> <div data-bbox="941 1186 1510 1270" style="border: 1px solid black; padding: 5px;"> <p>Results</p> <p>Test Word Document: <span style="border: 1px solid black; padding: 2px;">Marked</span></p> <p>Close</p> </div> <p> Click <b>Close</b>.</p>

Status (1)






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

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



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 File Feature: Delete

Gear Icon – How to Delete File(s)	
Step	Action
	<p>Select a <b>file(s)</b> from the <b>Entity File Area</b>. Hover over the <b>Gear</b>  icon, the action list will display. <i>Click Delete.</i></p> <p>The <b>These files will be deleted....</b> window will display.</p> <p> <i>Click Delete File.</i></p> <p> <i>Click OK.</i></p> <p>The <b>Results</b> window will display.</p> <p> <i>Click Close.</i></p> <p><a href="#">File Management Table of Contents</a></p>

- Publish and Link
- Publish only
- Link only
- Unpublish / Unlink
- Mark For Deletion
- Delete

These files will be deleted...

TEST EXCEL\_20190212\_1059 (DOC10025593)

ichannel.conarc.com says

Are you sure?

Results

Test Word Document: Marked