



Job Aide

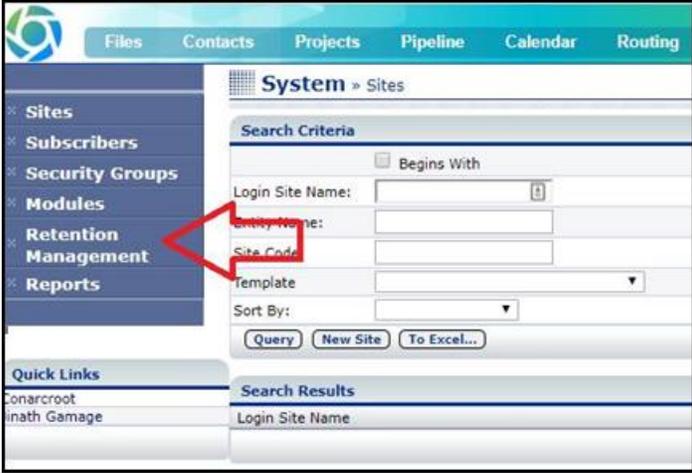
iChannel Retention Module

iChannel Retention Module - Overview

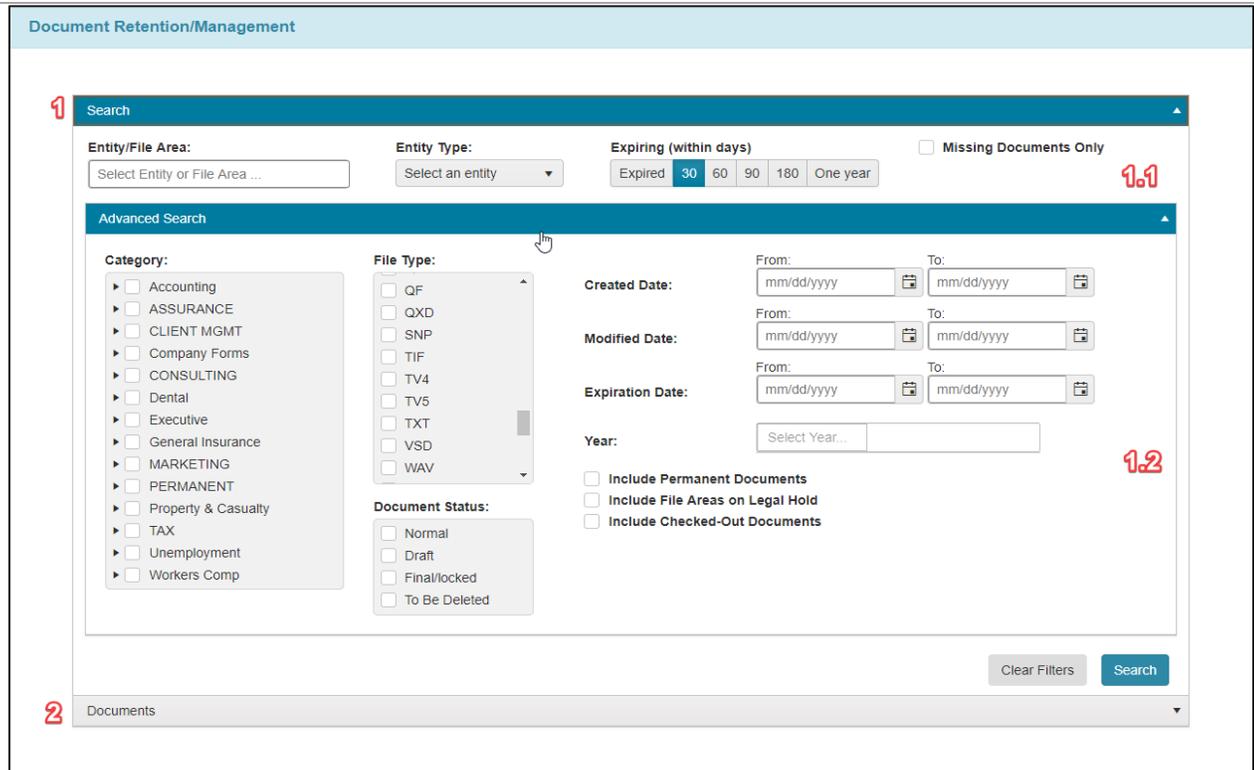
iChannel Retention Module provides clients with the ability to identify the parameters when archiving and setting retention policies on documents. Below will provide an overview of the features and functionalities. To *access* the **iChannel Retention Module** (Administrative permission): **System tab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

How to Access iChannel Retention Module

Steps for How to Access iChannel Portal

Step	Action
1	<p>Clients will access System tab > Retention Management.</p> <ul style="list-style-type: none"> Contact your Organization Contact representative if you need assistance with accessing iChannel Retention Module. 
2	<p>After accessing the Document Archiving and Retention Management link, the first window to display will be the Search section. On the Search window, users have access to:</p>



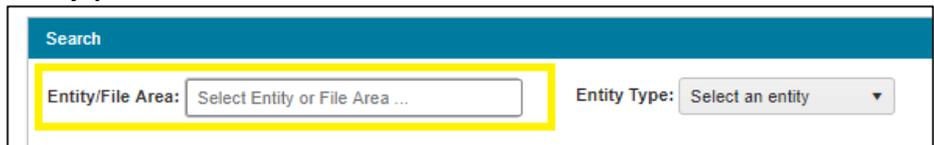


1 – Search

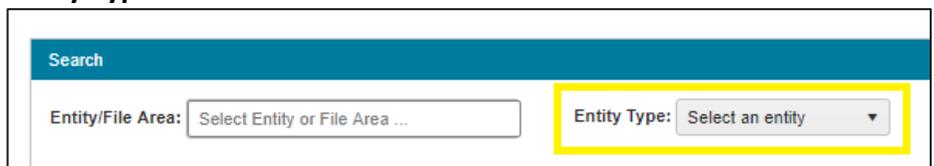
1.1 – Quick Search

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

Entity | File Area



Entity Type



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



- Missing Documents Only - Missing Documents is a checkbox; when checked, the returned results are documents that exist in the database, but do not actually have a matching physical file in the identified document path in the



file server.. In other words, this will return missing documents from the physical hard drive, but still recorded in the database Document table.

The displayed File Path is the root folder structure, plus the filename.

○ **1.2 – Advanced Search**

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

- **Category**

- **File Type**

Document Status:

 Normal
 Draft
 Final/locked
 To Be Deleted

- **Document Status**

 DOT
 DSW
 EML

Document Status:

 Normal
 Draft
 Final/locked
 To Be Deleted


- Created Date (range)

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

- Modified Date (range)

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

- Expiration Date (range)

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

- Year

Expiration Date:	From: mm/dd/yyyy	To: mm/dd/yyyy
Year:	Select Year...	

- Include Permanent Documents (checkbox)

Year:	Select Year...
<input type="checkbox"/> Include Permanent Documents	
<input type="checkbox"/> Exclude File Areas on Legal Hold	
<input type="checkbox"/> Include Checked-Out Documents	

- Include File Areas on legal hold (checkbox) Include Checked-out Documents (checkbox)



2 – Documents (Search Results)

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

Client (Document)	Document Code	File Name	File Type	Created Date	Last Modifie...	Document State	File Size	Location
Entity Name: Central Maine Power								
<input type="checkbox"/>	DOC003797	2014-erins test site-case studies-freedom home care-03102014_0255pm.pdf	PDF	01/30/2015	03/10/2014	Normal	275.1KB	\\CHANNELICINTRA\ERINS TEST SITE\
<input type="checkbox"/>	DOC003798	2014-erins test site-case studies-georgia community support-03102014_0255pm.pdf	PDF	01/30/2015	03/10/2014	Normal	80.4KB	\\CHANNELICINTRA\ERINS TEST SITE\
Entity Name: Corneilia Brown								
<input type="checkbox"/>	DOC0006996	2014-Corneilia Brown-Correspondence-Insured Consent Form (1)-1132014 122356PM.docx	DOCX	11/03/2014	11/03/2014	Normal	16.6KB	\\CHANNELICINTRA\PROSPECT\CO... BROWN\
Entity Name: Dental								
<input type="checkbox"/>	DOC0037001	2014-Dental-COBRA-Filing No S-FB-00145-1132014 122649PM.pdf	PDF	11/03/2014	11/03/2014	Normal	233.5KB	\\CHANNELICINTRA\INS\DENTAL\ID...
<input type="checkbox"/>	DOC0037002	2014-Dental-COBRA-Insurance Claim-1132014 122546PM.pdf	PDF	11/03/2014	11/03/2014	Normal	2763.1KB	\\CHANNELICINTRA\INS\DENTAL\ID...
<input type="checkbox"/>	DOC0037003	2014-Dental-COBRA-Insured Report Claim-1132014 123649PM.pdf	PDF	11/03/2014	11/03/2014	Normal	2768.7KB	\\CHANNELICINTRA\INS\DENTAL\ID...
<input type="checkbox"/>	DOC0006999	2014-Dental-Participation Agreement-Patent Filing-1132014 122623PM.pdf	PDF	11/03/2014	11/03/2014	Normal	2763.5KB	\\CHANNELICINTRA\INS\DENTAL\ID...
<input type="checkbox"/>	DOC0037000	2014-Dental-Participation Agreement-Patent Form A_16-1132014 122624PM.docx	DOCX	11/03/2014	11/03/2014	Normal	192.7KB	\\CHANNELICINTRA\INS\DENTAL\ID...
Entity Name: Information Technology								
<input type="checkbox"/>	DOC33635	2018-Information Technology-Accounting Reports-TEST FILE_20180612_1320-6122019 12421PM.TXT	TXT	06/12/2018	06/12/2018	Normal	0KB	\\channelicintr\ngibberts for kls\

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

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

