



## iChannel New Features v3.0 + (2021)

- This document covers the highly anticipated features upgrades of iChannel v3.0 +.
- To access all new Features and Enhancements throughout iChannel, please click the following link for iChannel Release Notes
  - v2.20+ iChannel Upgrade Coming Attractions
  - V3.0 iChannel Release Notes
  - V3.1 iChannel Release Notes

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New	<b>Top menu icons</b> are re-designed to match with the new iChannel theme.
UI Enhancements iChannel Theme V2.20+	<image/>
New Module	The new <b>iChannel Retention Module</b> provides clients with the ability to identify the parameters when archiving and setting retention policies on documents.
Retention Module V2.20 +	For more information on the Retention Module, please click the following links: <u>https://support.conarc.com/Retention Module Job Aid</u> or <u>iChannel Retention</u> <u>Module iLearning video</u> . PreteriorManagement
	set set the trap is th
New Module Advanced Query V3.0	The Advanced Query (previously Report Query) has been relaunched with new functionality. Advanced query module allows customize reporting for clients and contacts.
	Show up to: 100     Contact Info     Last Name:     Name:



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New	With v3.0 organizations can now customize <b>Email Templates</b> . Administrators can reference
Encoll Encoulation	the 'Custom Email Templates' guide to learn more:
Email Templates	
V2.20 +	
12.20	JOB AID iChannel Guide Email Template Customization
	Custom Notification Emails
	Previously, emails that were generated in iChannel only had the ability to use six (6) out-of-
	the box non-customized email notification templates. With this release, Clients can now
	request to customize up to 18 Notification Emails.
	request to customize up to 16 Notification Emails.
	Below outlines the 18 notification templates for customization in iChannel:
	6 of the 18 Custom Notifications Email templates can be modified by an
	organization without the engagement of iChannel Support. The six (6) templates are
	(version release date):
	<ul> <li>File Added to Portal [PublishDocumetPortal] v2.20.0</li> </ul>
	<ul> <li>Password Change [PortalPasswordReset] v2.20.0</li> </ul>
	<ul> <li>Welcome to Portal [PortalReady] v2.20.0</li> </ul>
	<ul> <li>Projects [ProjectDetails] v2.20.3</li> </ul>
	<ul> <li>Activities [ActivityReminder] v2.20.3</li> </ul>
	<ul> <li>Activities Details [ActivityDetails] v2.20.3</li> </ul>
	I2 of the 18 Custom Notification Email templates requires the engagement of
	iChannel Support due to their complexity in the configuration, in addition these 12
	Custom Notification Email templates are not in the .Json file format.
	Intel 12 templates are:
	○ ICSFile
	<ul> <li>FileSubmissionReceipt</li> </ul>
	·
	<ul> <li>FileSubmissioinNotification</li> </ul>
	<ul> <li>EmailTemplateBasic</li> </ul>
	<ul> <li>DocumentLinkSecureKeyEmailTemplate</li> </ul>
	<ul> <li>DocumentLinkAttachmentEmailTemplate</li> </ul>
	<ul> <li>DocumentCheckoutEmailTemplate</li> </ul>
	<ul> <li>DocumentCheckinEmailTemplate</li> </ul>
	<ul> <li>ActivityEmail</li> </ul>





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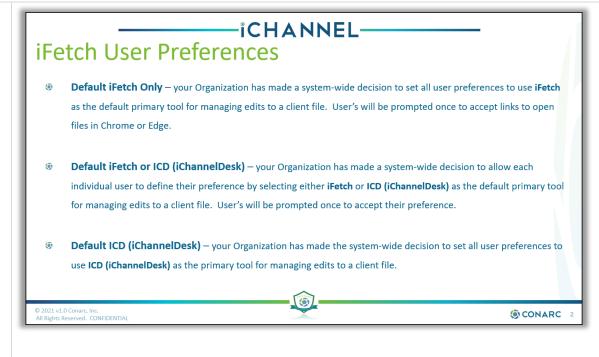
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With upgrading to iChannel v3.1 installation, an organization has to pick if they would like to exclusively use iFetch or CD for all their users TO OPEN FILES IN DIRECT MODE or use a combination (some users use iCD while others use iFetch - both can't be run simultaneous by a user TO OPEN FILES IN DIRECT MODE ).

If the organization opt for Both, then when a user opens a file in iChannel direct mode in a file area for the first time, user is prompted to select to open the file via either **iFetch or iCD**. The respective selection is persisted in advanced settings, which will be automatically picked, when direct mode is used next time.

• The selection can be changed whenever required, through Subscriber details page by changing the respective advanced setting.

	tion in Direct mode, you need to pick an application. application later by navigating to System >> Subscriber Details >> Advanced Setti	ngs.
iCD = iChannel Des iFetch = Direct File		
Please contact your	system administrator for further assistance.	



New		
New	Now emails can be drag and drop from Microsoft Outlook to iChannel web	
Enhancement	required to run iCD or iFetch to perform the action. When emails are dragg	
	into Channel upload boxes, the function would move a copy of the respect	ive email to
File Area	iChannel from the mailbox.	
Emails		
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New Feature	New <b>DocuSign History Report</b> is added to the 'My Recent Files' Dashboard	-
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V3.1+		
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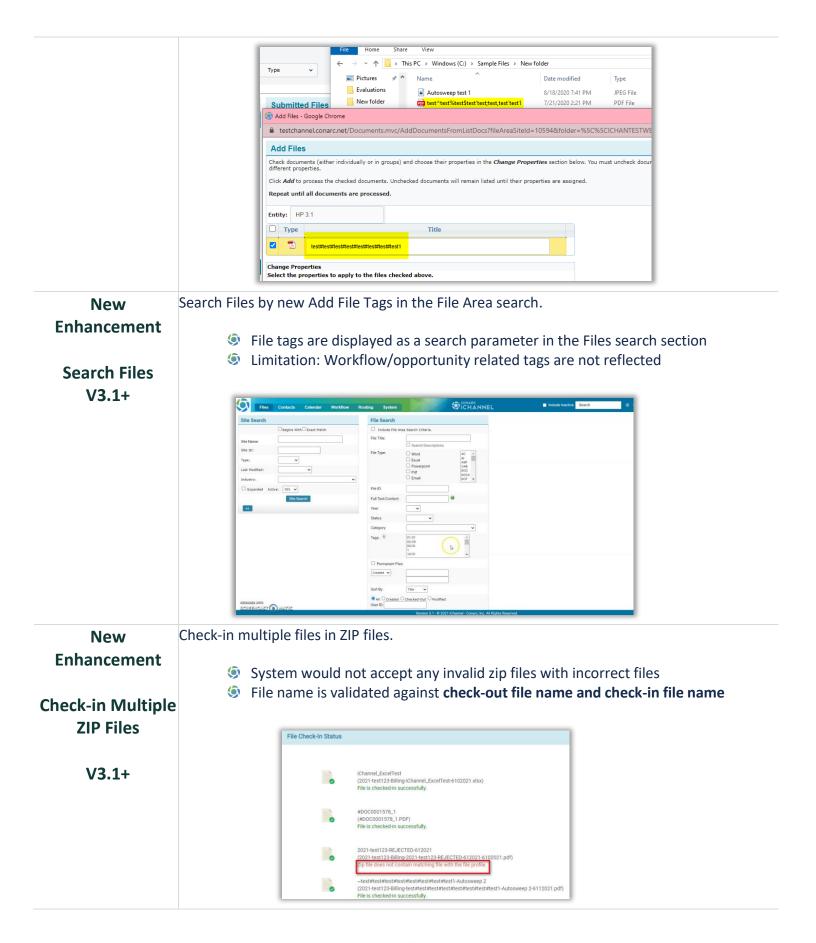




		SYSTEM	» Subscriber Details			_
		- When a	a portal user first created b	w the admin or r	eset nassword	
		Last Name:*	pwduser1	Site Name: Site Code:	HP 3.1 (Portal) 10604	
		User ID:*	user111@mailinator.com	Active:	Yes 🗸	
		EMail:*	user111@mailinator.com	Administrator:	No 🗸	
		Phone:		Multiple Login:	Yes 🛩	
		-	Reset Password Adv. Settings	Created:	05/28/2021 07:43 AM by ichan syc	
			Email Notification	Modified:	05/28/2021 07:43 AM by ichan_svc	
		1 F	Send Portal Is Ready Email	Agreed to Terms: Last Login:	01/01/1900 12:00 AM (History)	
		-		Last Login.	01/01/1900 12:00 AM (History)	
		Email Signa	ature:			
		Body:				
			Dear pwduser1 ,			
			The portal to access and or upload you Please note that your login is your Emi			
			If this is the first time you are logging in		te your password.	
			Click here to login. https://portal.domai	n.com		
			Thank you,			
		SYSTEM » S	subscriber Details			
				mporany passwo	rd	-
		When the	subscriber Details		ord 3.1 (Portal)	
		When the Last Name:*	portal user change the ter		3.1 (Portal)	
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		When the Last Name." [ First Name." [ User ID." [	portal user change the tel puduser1 puduser1 user111@mailinator.com	Site Name:         HP           Site Code:         106           Active:         Ye           Administrator:         Ne	3.1 (Portal) 04 5 ~	
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		When the           Last Name:*         [           First Name:*         [           User ID:*         [           EMail:*         [           Phone:         [	portal user change the ter puduser1 puduser1 user111@mailinator.com user111@mailinator.com	Site Name:         HP           Site Code:         106           Active:         Ye           Administrator:         No           Multiple Login:         Ye           Created:         05/7           Modified:         05/7	3.1 (Portal) 04 ▼ ▼ 8:2021 07:43 AM by ichan_svc 8:2021 05:03 AM by	
		When the       Last Name:"       First Name:"       User ID:"       EMait:"       Phone:	P portal user change the ter produser1 user111@malinator.com user111@malinator.com Reset Password Adv. Settings	Site Name: HP Site Code: 106 Active: Ye Administrator: Ne Multiple Login: Ye Created: 057 Modified: 057	3.1 (Portal) 04 • • • • • 8/2021 07:43 AM by ichan_svc	
		When the       Last Name:"       First Name:"       User ID:"       EMait:"       Phone:	P portal user change the ter produser1 user111@malinator.com user111@malinator.com Reset Password Adv. Settings Email Notification	Site Name: HP Site Code: 106 Active: Ye Administrator: Ne Multiple Login: Ye Created: 05/7 Modified: 05/7 Agreed to 05/7 apple this button	3.1 (Portal) 04 9 0 104 105 105 105 105 105 105 105 105	
		When the       Last Name:"       First Name:"       User ID:"       EMait:"       Phone:	Portal user change the ter produser1 produser1 user111@malinator.com user111@malinator.com Reset Password Adv. Settings Email Notification Send Portal is Ready Email	Site Name: HP Site Code: 106 Active: Ye Administrator: Ne Multiple Login: Ye Created: 05/7 Modified: 05/7 Agreed to 05/7 apple this button	3.1 (Portal) 04 • • • • • • • • • • • • • • • • • • •	
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Enhancement	<ul> <li>Invali</li> <li>Such</li> <li>Allow</li> <li>Point</li> </ul>	When the Last Name:" First Name:" User ID:" EMat:" Phone: id/bad ch characted yed Chara is of Ingree	portal user change the ter puduer1 puduer1 puduser1 user111@mailnator.com wer111@mailnator.com Reset Parssword Adv. Settings Email Notification Send Portal is Resety Email Reset the password to mess are now Valian paracters are strip rs are replaced v pacters: a-z A-Z O-	Site Name: HP Site Code: 106 Active: Ye Administrator: Ne Multiple Login: Ye Created: 057 Modified: 057 Modified: 057 or anable this button 057 idated & C pped from vith # 9 ! # ( ) g & Drop,	3.1 (Portal) 04 ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■	







## iChannel New Features v3.0 + (2021)



New	File History Report has been enhanced.	File History	
Enhancement		Filter by Action:	~
Ennancement	( Uistory Deserds Datails of File		
	History Records Details of File	Unlinked: Details:	1/1/2021 11:29:35 AM - ADMIN (ADMINISTRATOR USER) From 12-02-175-00F1 UPS Mahwah 2nd Floor Doors in Pink
	History section in File area is	Details.	From 12-02-173-001 FOF 3 Manwall 2nd Floor Doors in Fink
File History	enhanced	Unpublished:	1/1/2021 11:29:35 AM - ADMIN (ADMINISTRATOR USER)
Report		Details:	Category: Client Documents/Billing
V3.1+	File History	Linked:	1/1/2021 11:29:07 AM - ADMIN (ADMINISTRATOR USER)
	Filter by Action:	Details:	to 12-02-175-00F1 UPS Mahwah 2nd Floor Doors in Pink
	Linked: 3/28/2021 11:04/26 PM - zoneadmin (Zone Admin) Link Only Link Only		
	File History	Published:	1/1/2021 11:28:23 AM - ADMIN (ADMINISTRATOR USER)
	Time for Actives	Details:	Category: Client Documents/Billing
	Denki Pro Dorth end und generation france CC to practic Analyzing and an analyzing and analyzing analyzing and analyzing	Emailed:	1/1/2021 11:22:58 AM - ADMIN (ADMINISTRATOR USER)
	Downied Capatria (Die Artz)2011 Inwieder Jack (Diensies 2 Downied (Die Nay) (Biolit20)	Details:	Document Email: Email To: pasanp@zone24x7.com; Attachment Type: Zip file
	File History Filter by Action:	Emailed:	1/1/2021 11:21:55 AM - ADMIN (ADMINISTRATOR USER)
	Linked: 3/28/2021 11/29 09 PM - zoneadmin (Zone Admin) Details: to ABCTR-1 Published: 3/28/2021 11/29 09 PM - zoneadmin (Zone Admin)	Details:	Document Email: Email To: pasanp@zone24x7 com; Attachment Type: Link (Id = I Feature Used:Send as Link (File Area) Download Expiration Date: 1/31/2021 Number of Allowed Downloads: 2 Download Link Key: 78638436
	Details: Category: Clent/Financial Data	Versioned:	1/1/2021 11:20:32 AM - ADMIN (ADMINISTRATOR USER)
		Details:	versioned name: \$DOC39929_1.PDF Note: Test
		Details:	
New	Autosweep Functionality	Details:	
	Faster and instant functionality is pro	ovided (a	Iways running in backend)
Enhancement		ovided (a	Iways running in backend)
	<ul> <li>Faster and instant functionality is pro</li> <li>sync-up files with front-end and show</li> </ul>	ovided (a vs in resp	Iways running in backend) Dective file area instantly
Enhancement	<ul> <li>Faster and instant functionality is pro</li> <li>sync-up files with front-end and show</li> </ul>	ovided (a vs in resp	Iways running in backend) Dective file area instantly
Enhancement Autosweep	<ul> <li>If aster and instant functionality is prospective sync-up files with front-end and show</li> <li>If categories are not applied → show</li> </ul>	ovided (a vs in resp	Iways running in backend) Dective file area instantly
Enhancement	<ul> <li>Sector and instant functionality is prospective sync-up files with front-end and show</li> <li>If categories are not applied → show</li> </ul>	ovided (a vs in resp s as Unc	Iways running in backend) bective file area instantly ategorized file
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Enhancement Autosweep	<ul> <li>♦ Faster and instant functionality is pro</li> <li>♦ sync-up files with front-end and show</li> <li>♦ If categories are not applied → show</li> <li>♦ If categorized File</li> <li>● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●</li></ul>	ovided (a vs in resp s as Unco <sup>Size Seco 100 k 70 k Res 70 k Noti</sup>	Iways running in backend) bective file area instantly ategorized file

**Recatalog Feature** With v3.1 iChannel will not log support the feature: Recatalog as it has been deprecated.

Joe Bondranko (1402124) 👔 😵 😴 😪 🎲 🖏 💈
Title/Decorption Ocontent     Type     Type
Add Document to be Scanned (generate routing slip)
Copy Permanent Reguest Files Link to Clipboard
Add Hyperlink(s) (to any URL Or other File Areas)
Recatalog (Rebuild the filgarea)
Generate & View Thumbnails of any Images (JPG's)

