What's New in Identifi 11.1
(Upgrading from 10.4)

MULTI-APPLICATION SUPPORT FOR BATCHES

- **Batch Processing has been expanded to support Document Types in more than one Application.**
  Scan Plans can now be configured to support more than one Application.
  When a Scan Plan has multiple Applications, a new Application drop-down field will be visible during the batch indexing process


- Still required to select at least one Application per Scan Plan
- One Application **must** be designated as the 'Default,' which is used to decide which value to initially set when the selected Document Type is associated to multiple applications in a Scan Plan
- Upon upgrade, there will be no change to the current batch indexing functionality. Administrators will have to opt in by configuring more than one Application on their scan plans.

- If the Scan Plan is configured for a single Application, the Application field is hidden.
- When a Document Type matches more than one Application, where one is the default, the default Application is initially set.
- When the Application cannot be determined, the user is required to select the correct Application.
- Best Practice is to have a Document Type associated to a single Application.
- Sticky will also carry forward the Application in addition to the Document Type when enabled.
- Same rules are applied during auto indexing, however if we cannot definitively determine the Application, manually indexing is required.

MULTI-APPLICATION SUPPORT FOR ONLINE ESIGN PACKAGES

- **OLE Packages can now support Document Types in more than one Application.** This is applicable to the documents added to the signing package, as well as attachments that are collected during the signing process.

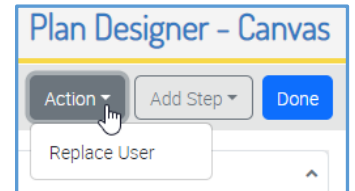 OLE Profiles can now be configured to support more than one Application
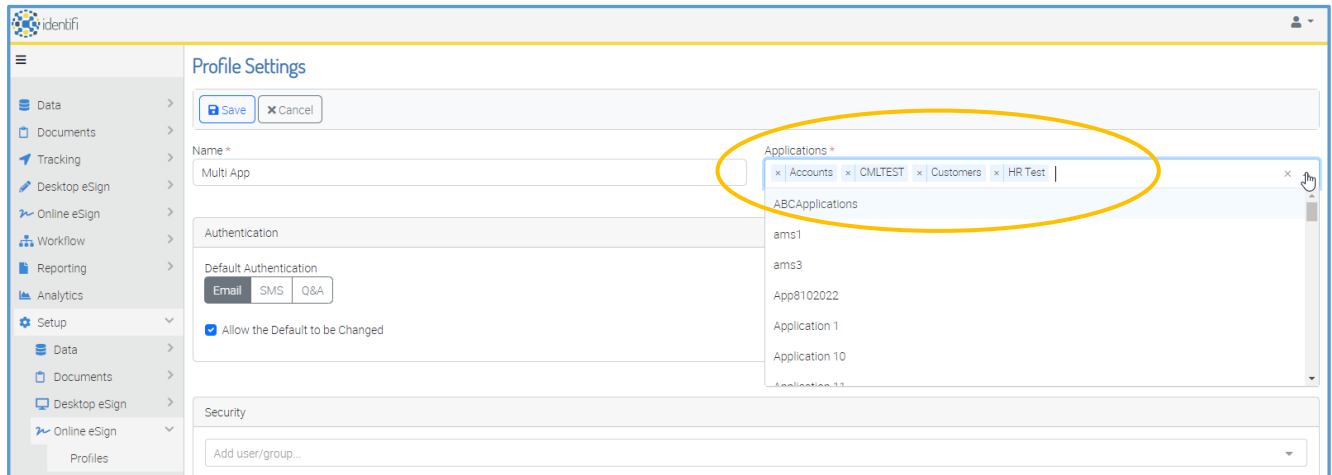
  When creating an OLE Package, in addition to the Document Type Field, there is now an Application Field for both package documents and attachments.
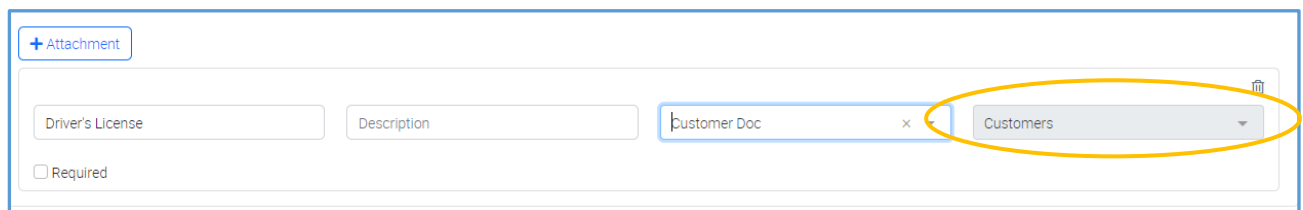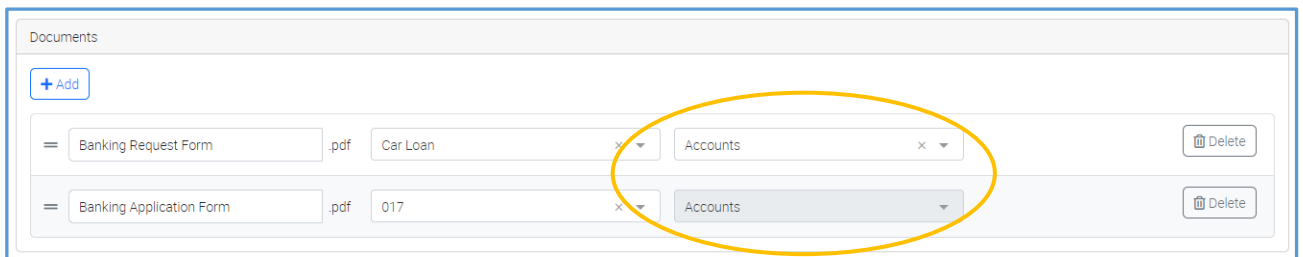

  - The Document Type Drop down will contain a list of all Document Types associated to the Applications configured for the selected Profile.
  - If the selected Document Type is tied to a single Application, then the value is automatically set and is read only. If not, then user will have to select the Application.
  - Document Types and Applications can still be modified during Batch Indexing if they were incorrectly set when the package was signed.
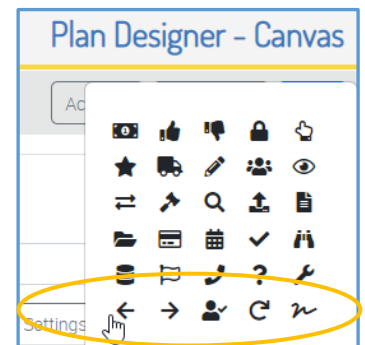
WORKFLOW

- A **Replace User Feature** is now available within the Workflow Plan Designer. This option allows Administrators to replace all references in the plan, from one user to another user. This feature is helpful when users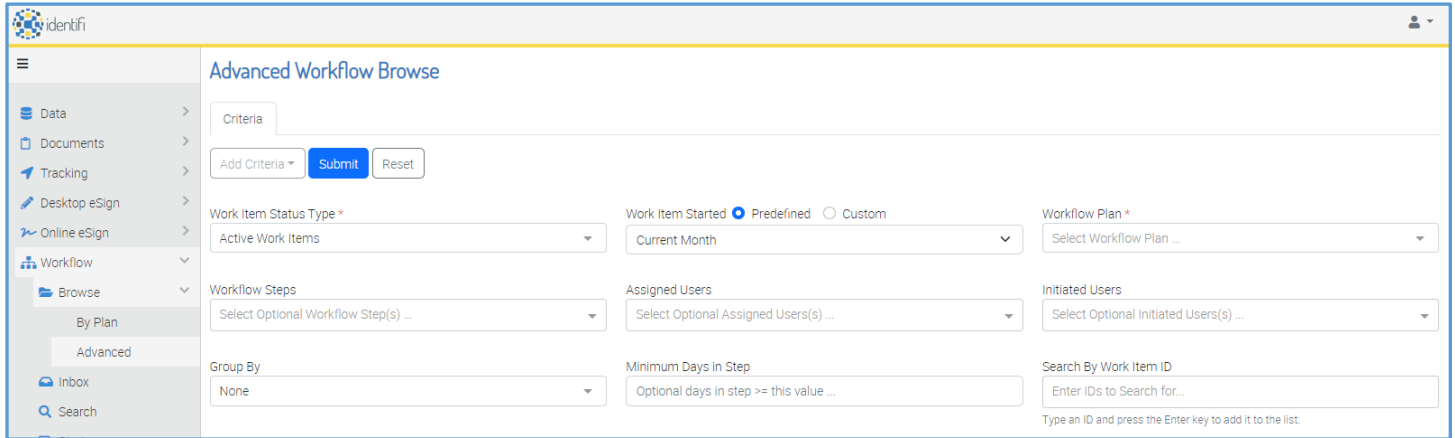 change departments or exit the organization. Please note that this functionality will not impact who is currently assigned to a work item. If that needs to change, then it can be done by reassigning the individual work items.Selecting the *Show Usage* option will display all instances where the user is currently referenced in the Workflow Plan.
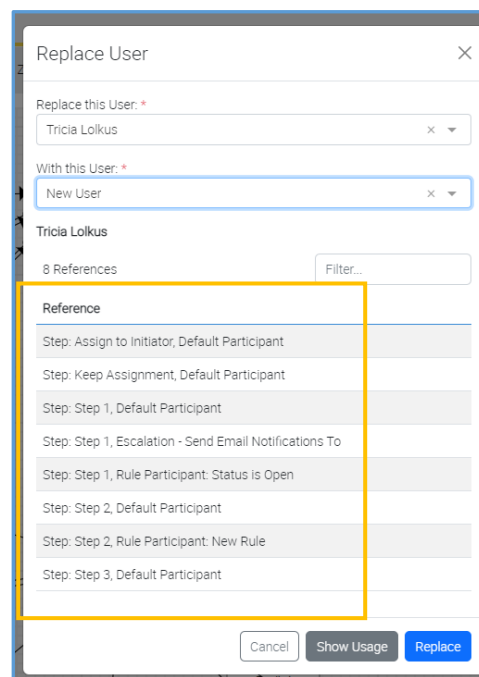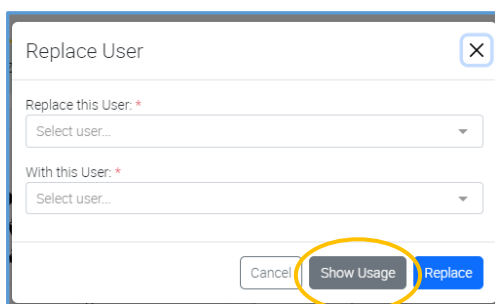
- **Additional Icons** were added within the Workflow Plan Designer. These new icons are available for use on action buttons throughout the Workflow plan.
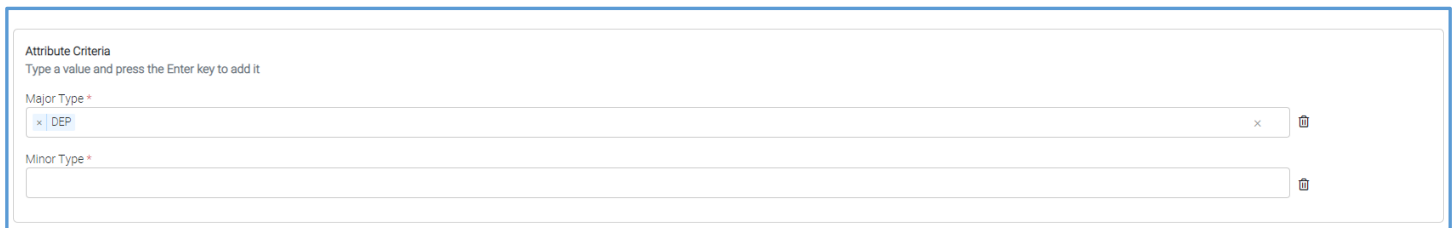
- **Enhanced Standard Criteria available in ADVANCED WORKFLOW BROWSE:** Standard criteria used for Workflow browsing has been expanded to now include: *Work Item Status Type (Active or Inactive), Initiated User, Minimal Days in Step* and *Search by Work Item ID*.
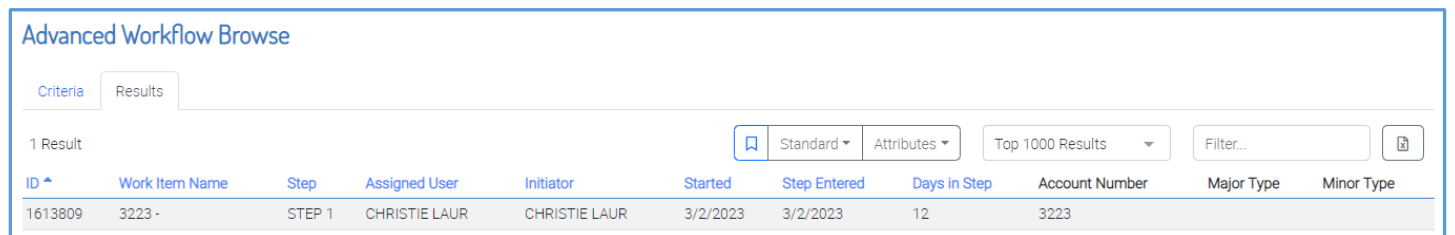

- **Attribute Criteria now available in ADVANCED WORKFLOW BROWSE:** Users can now include Attribute Data in their workflow search criteria. Currently only string attribute fields are available**.**

- **New features for customizing the Search Results in ADVANCED WORKFLOW BROWSE:** Enhancements were made to provide more flexibility when displaying the search results from Workflow Advanced Browse. Users now have the ability to Show/Hide both Standard and Attribute Fields. Search results are also now displayed on a single page. Results are limited to the Top 1000 with an option to increase that to 10,000.
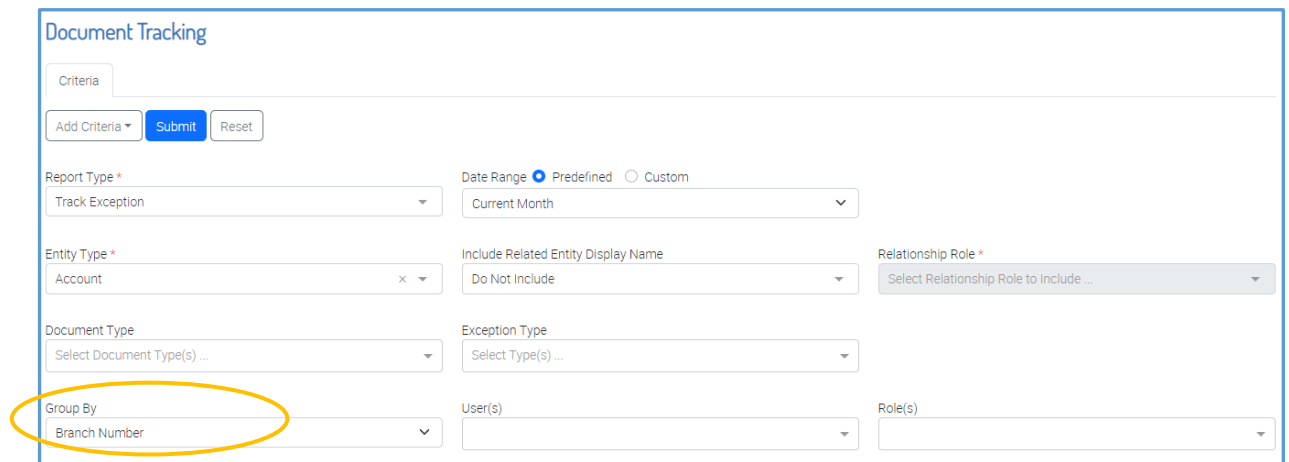

- Also, similar to other reports, users can easily copy the URL, which can be saved as a bookmark for future use. The bookmark will remember the search and filtering criteria as well as the customizations made to the search results.

TRACKING REPORTS

- **Enhanced 'Group By' Functionality in Track Reports:** Report Users now have the option to group their results using an Attribute. For example, when looking at Account exceptions, the report can be grouped by the 'Branch Number' attribute.
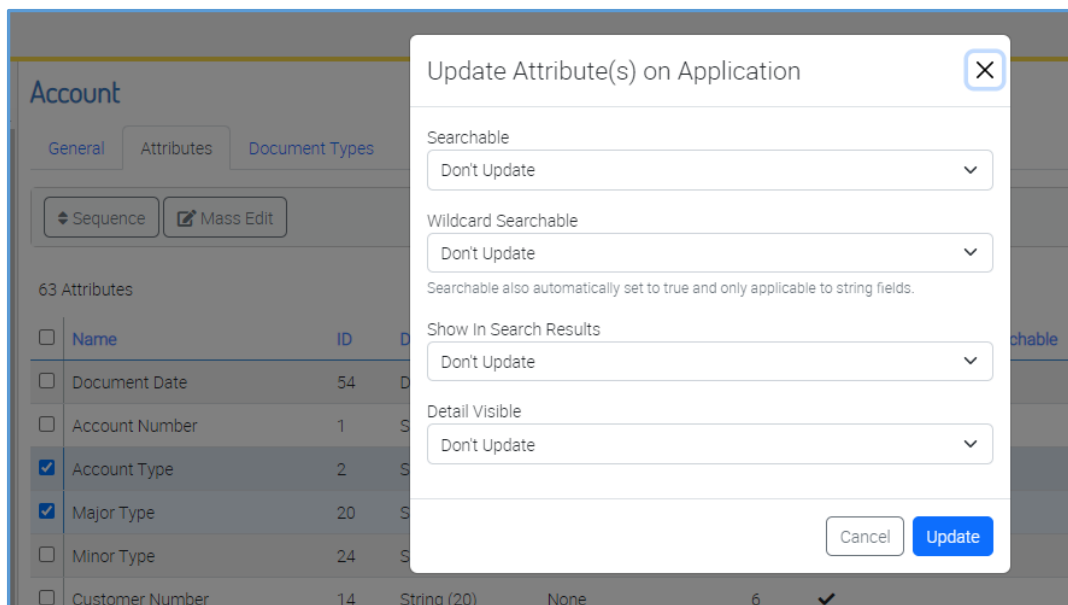

CONFIGURATION

- **MASS UPDATE on Application Attributes**: In this release, Administrators have the ability to Mass Update Application Attribute Settings

- **MASS UPDATE and IMPORT eReceipt Exclusions**: In this release, Administrators have the ability to import eReceipt exclusions as well as mass update the amount values.

Import Receipt Exclusions ✕

Import File *

| Choose File | No file chosen |

Text file with transaction type and dollar amount, tab separated, 1 per line

Example of File Contents:
WTH -500.00
DEP 500.00

Cancel Import

Manage Receipt Exclusions

+ Add 🗑 Delete ⬆ Import ☑ Mass E

Update Amount on Receipt Exclusions ✕

Amount
$0.00

Cancel Update

7 Exclusions

☐ Transaction Type	
☐ WTT	less than $29.00
☐ WT2	less than $75.00
☑ DE2	less than $(500.00)
☑ XY2	less than $(20.00)
☑ XY1	No Signature Prompt

- **USER SECURITY EXPORT:** On the Manage Users page there is a new 'Export Security' option, that when selected it creates an Excel export listing all of the Identifi Roles assigned to the selected user(s).

Manage Users ⑦

+ Add 🗑 Delete Activate Deactivate Reset Password Unlink ⬇ Export Security

63 Users (60 Active, 100 Licensed)
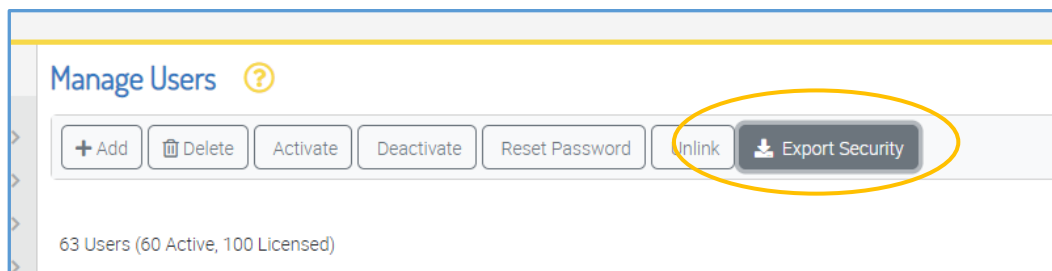
- **Database Consolidation**

  In this release, the Core and the Data Databases have been merged into a single Identifi database. This consolidation effort has been underway for the past few releases, and this step completes the effort. Moving to a single database improves efficiency, performance and simplifies support.

- **Topaz Control Upgrade**

  In this release, we upgraded the Topaz Control to the latest version available. This control is used to capture signatures from Topaz Tablets in both our eSign and eReceipt products. As a result, Topaz requires client machines running eSign or eReceipt to have the Microsoft 2013 C++ Redistributable (version 12.0.40649.5 or above) installed, either prior to, or at the time of the upgrade. We have notified customers of this new requirement. Customers can also install the 11.1 machine wide installer as this will also lay down the C++ Redistributable, however this cannot be done until after the server is upgraded to 11.1. eSign and eReceipt will not work once upgraded to 11.1, if this piece of software is not installed on the client machine.

Upcoming Highlights
Changes Coming in Future Identifi Releases

- **Analytics Phase-Out**

  We continue the efforts to phase out Analytics by focusing on custom reporting needs. This process will continue throughout the year as we continue to improve the in product reporting features and provide customers with other ways to access the data they need to make their business decisions.