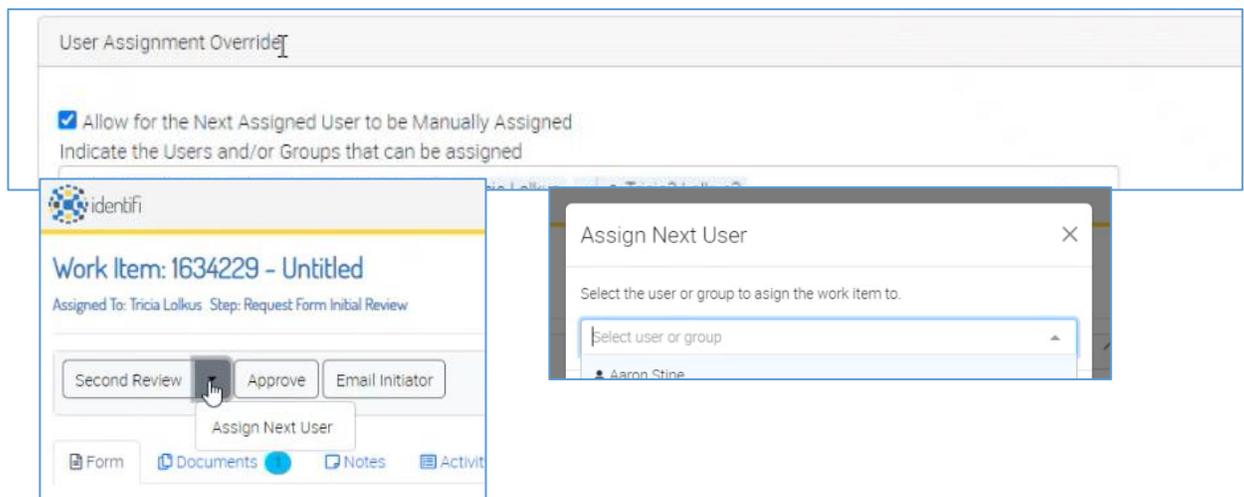


## What's New in Identifi 24.1 (Upgrading from 11.4)

### WORKFLOW:

- **Workflow Ad Hoc Routing / User Assignment Manual Override:** In the current version of Workflow, default routing can be determined by a rule (i.e., “if this situation/then that person gets the item”), or it can be assigned to the Initiator or the previous user, etc.

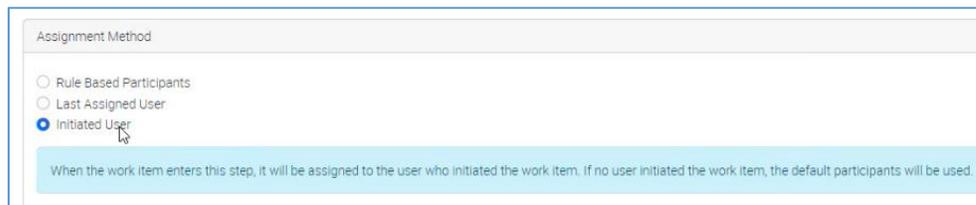
This new configuration option will give a User the ability to directly route the item to another User outside of the plan's inbound assignment rules, essentially “overriding” the default.



When this feature is enabled at the Action level, the Administrator will also be required to indicate which system users are available to be assigned at the time the action is taken. If the user taking the action would like to for the system's inbound rules to be used, then they can just click the action button as they do today. This override feature is optional based on the needs of the user.

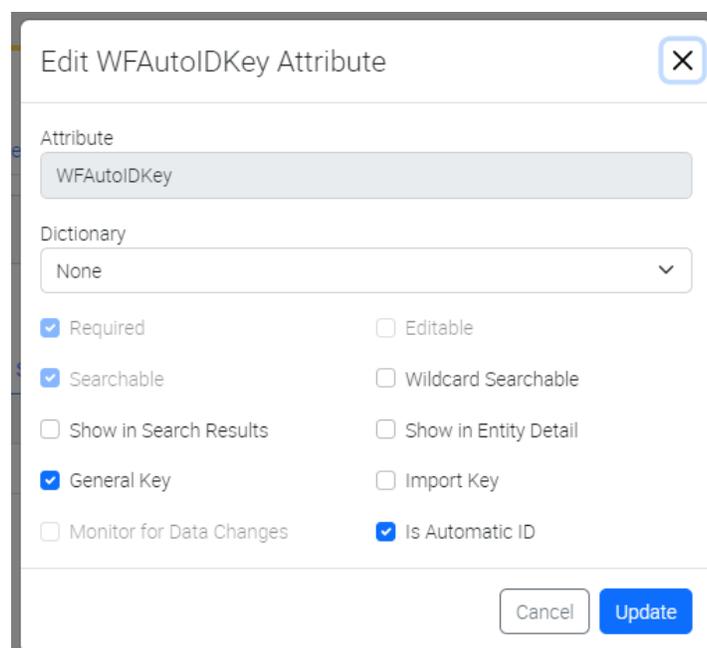
- **Workflow Started by the Arrival of a Document:**

When a Workflow starts by the arrival of a Document, the Workflow Initiator we be assigned as the person who added the document to the system. This will allow for the use other features within Workflow related to the Initiated User (e.g. Inbound Rules, Reporting on Initiated user etc.)

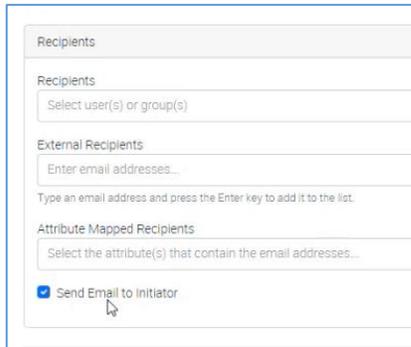


There is another new feature of Workflow, which allows you to automatically relate a document to a Workflow item if that Workflow Plan's General Key is the '*Automatic ID*' Attribute. Designating an attribute as an Automatic ID will instruct the system to populate a unique and custom ID to the work item at the time of creation.

In the case of starting a workflow with the arrival of a document, if that document has that same exact Attribute as an index field, when the custom value is assigned to the Work Item's AutoID attribute, that same attribute value will also be automatically applied to the Document's attribute, thus automatically relating the two items together.



- **Workflow email to Initiator:** This new option within the Email Step Properties can be enabled to allow an email to be sent to the initiator of the Workflow item, in addition to any designated Users and/or Groups listed within that step.



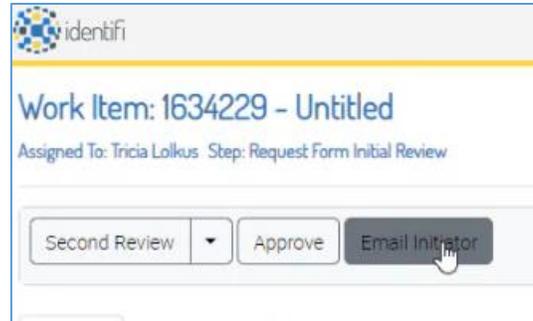
Recipients

Recipients  
Select user(s) or group(s)

External Recipients  
Enter email addresses...  
Type an email address and press the Enter key to add it to the list.

Attribute Mapped Recipients  
Select the attribute(s) that contain the email addresses...

Send Email to Initiator



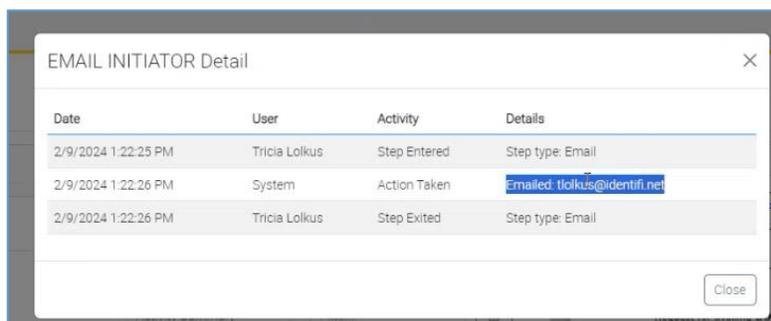
identifi

Work Item: 1634229 - Untitled

Assigned To: Tricia Lolkus Step: Request Form Initial Review

Second Review | Approve | **Email Initiator**

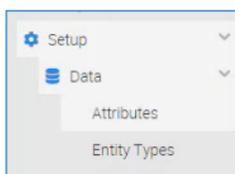
EMAIL INITIATOR	Emailed (System)
REQUEST FORM INITIAL REVIEW	In Progress... (Tricia Lolkus)



Date	User	Activity	Details
2/9/2024 1:22:25 PM	Tricia Lolkus	Step Entered	Step type: Email
2/9/2024 1:22:26 PM	System	Action Taken	Emailed: tlolkus@identifi.net
2/9/2024 1:22:26 PM	Tricia Lolkus	Step Exited	Step type: Email

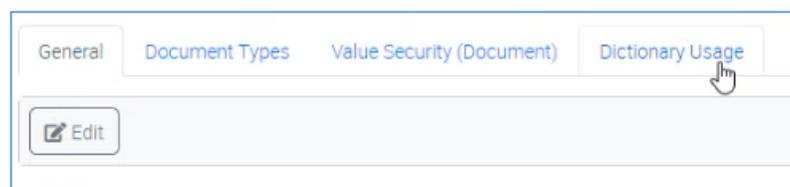
Close

- **Enhanced Dictionary Maintenance:**
  - Viewing Dictionary Usage across the Application



- Setup
- Data
- Attributes**
- Entity Types

There is a new "Dictionary Usage" tab within Attributes.



General | Document Types | Value Security (Document) | **Dictionary Usage**

Edit

This tab will display where, across both Entities and Applications, this Attribute is defined as a Manual Dictionary.

Branch

General Document Types Value Security (Document) Dictionary Usage

+ Mass Add Mass Delete Sync Values

2 Items

<input type="checkbox"/> Item Display Name	Item Type	Value Count
<input type="checkbox"/> Account	Application	6
<input type="checkbox"/> WF Demo Entity	Entity	6

Each Attribute can be opened to view the individual values for each specific area.

Manage Dictionary For Branch (Application: Account)

+ Add Delete Import

6 Values

Filter...

<input type="checkbox"/> Value	Alternate Value	Active
<input type="checkbox"/> Branch 1		✓
<input type="checkbox"/> Branch 2		✓
<input type="checkbox"/> Branch 3		✓
<input type="checkbox"/> Branch 4		✓
<input type="checkbox"/> Branch 5		✓
<input type="checkbox"/> Branch 6		✓

Close

Manage Dictionary For Branch (Entity: WF Demo Entity)

+ Add Delete Import

6 Values

Filter...

<input type="checkbox"/> Value	Alternate Value	Active
<input type="checkbox"/> Branch 1		✓
<input type="checkbox"/> Branch 2		✓
<input type="checkbox"/> Branch 3		✓
<input type="checkbox"/> Branch 4		✓
<input type="checkbox"/> Branch 5		✓
<input type="checkbox"/> Branch 6		✓

Changes made to one will not affect the Value Count of the other (i.e., in the example below, three Values were deleted from the Entity Dictionary, and it did not affect the Value Count in the Application Dictionary).

Manage Dictionary For Branch (Entity: WF Demo Entity)

+ Add Delete Import

6 Values

Filter...

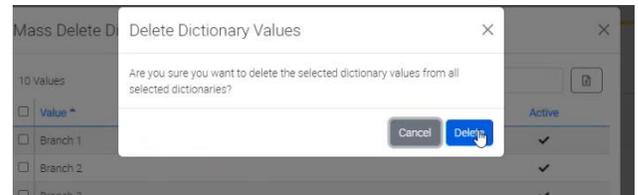
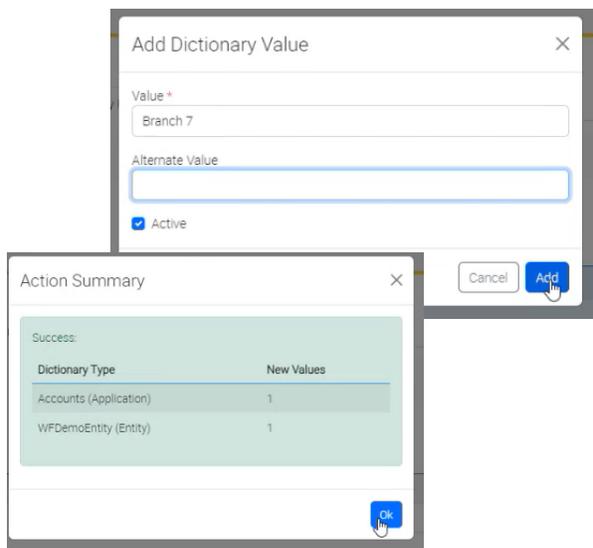
<input type="checkbox"/> Value	Alternate Value	Active
<input type="checkbox"/> Branch 1		✓
<input type="checkbox"/> Branch 2		✓
<input type="checkbox"/> Branch 3		✓
<input checked="" type="checkbox"/> Branch 4		✓
<input checked="" type="checkbox"/> Branch 5		✓
<input checked="" type="checkbox"/> Branch 6		✓

Close

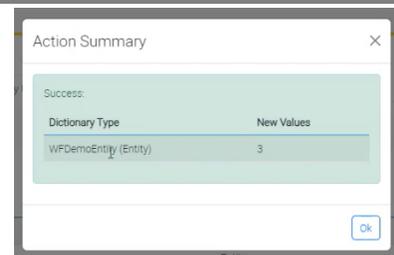
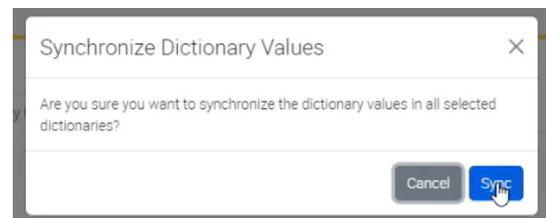
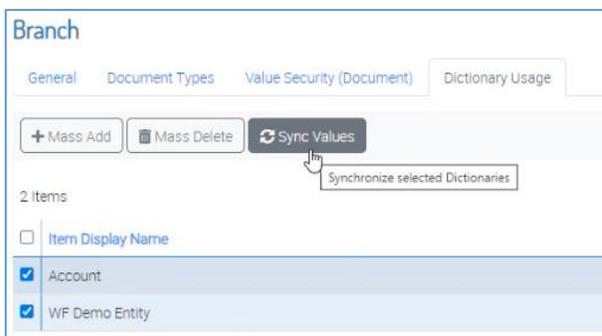
Item Type	Value Count
Application	6
Entity	3

**Mass Add / Mass Delete** – Allows the User to add or delete values within the selected Dictionaries from the list.

<input type="checkbox"/> Item Display Name
<input checked="" type="checkbox"/> Account
<input checked="" type="checkbox"/> WF Demo Entity

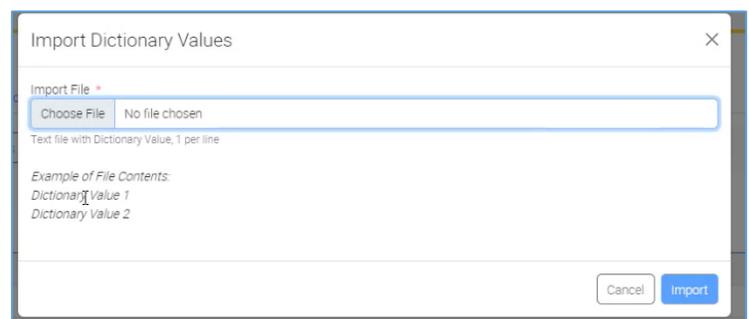
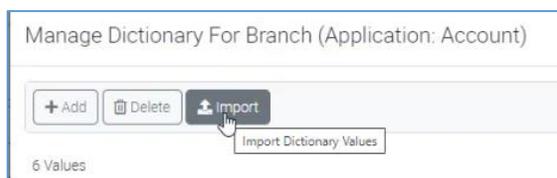


**Sync Values** – will synchronize the dictionary values in all selected dictionaries.

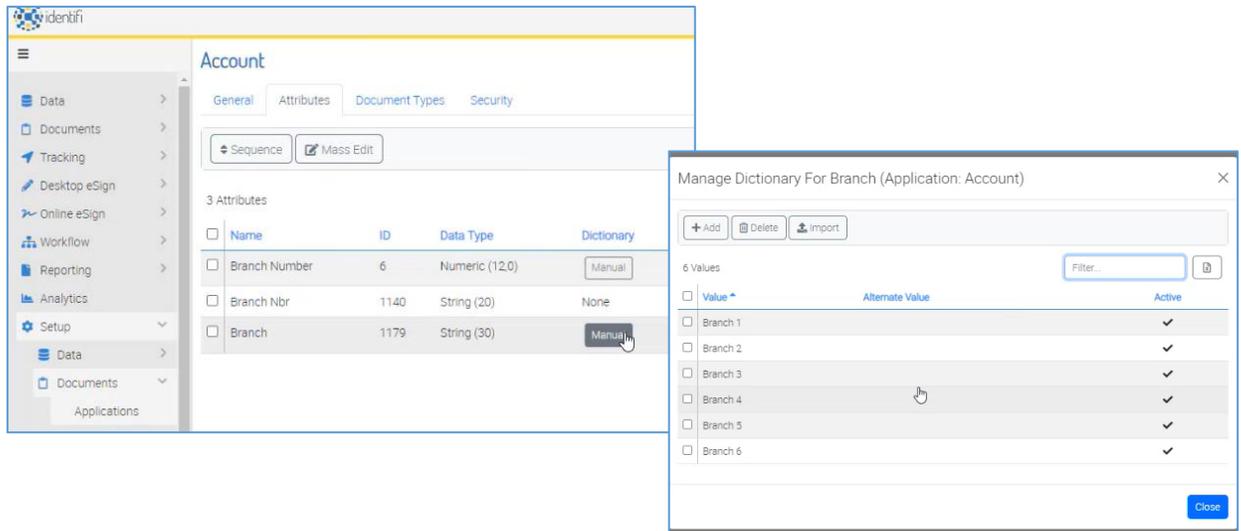


- **Import Features:**

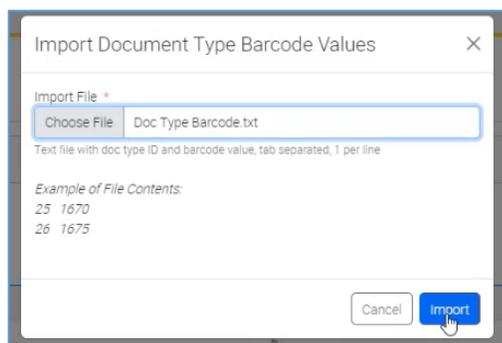
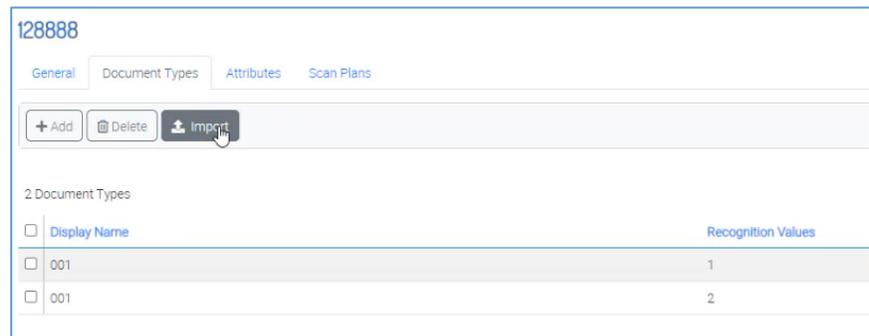
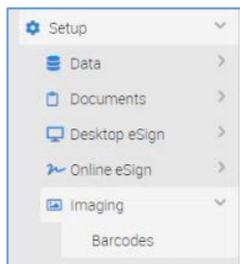
- We now provide the ability to mass import Manual Dictionary Values using a text file.



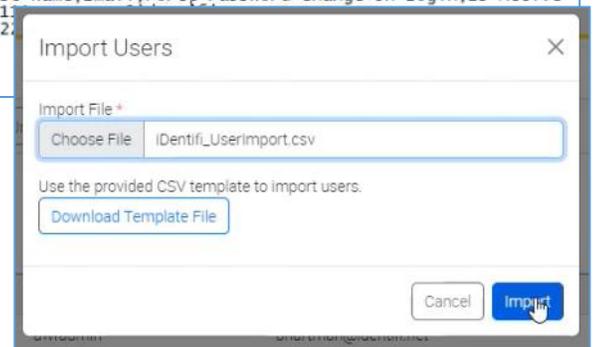
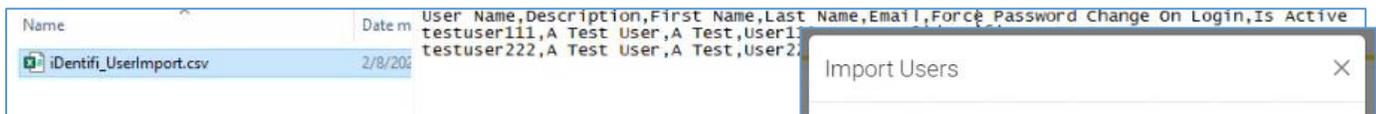
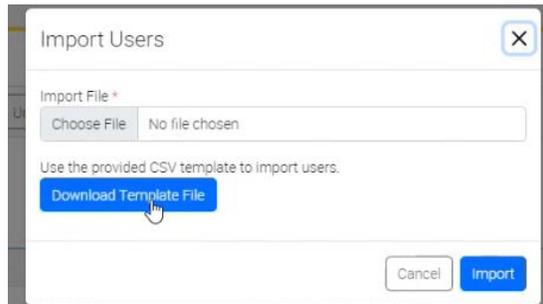
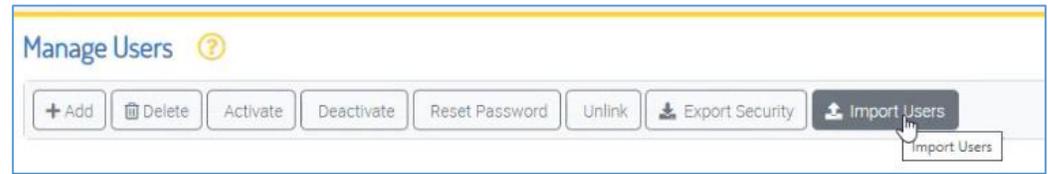
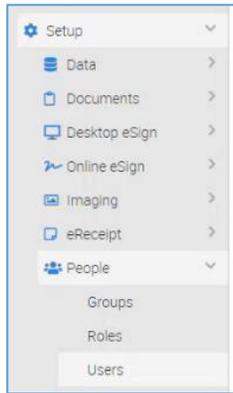
The import can also be performed from the "Manual" dictionary setting within the Application, under the Attributes tab:



- We now provide the ability to mass import Document Type and Barcode Code Recognition Values for a specific Barcode Format using a text file.

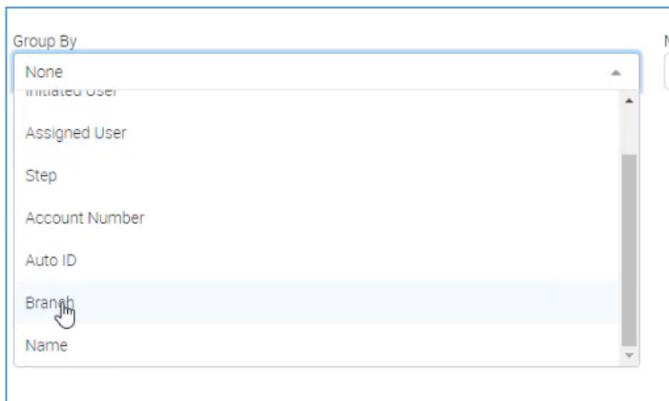


- Import Users – Allows for the import of a .csv file. A template is provided and can be downloaded for completion.

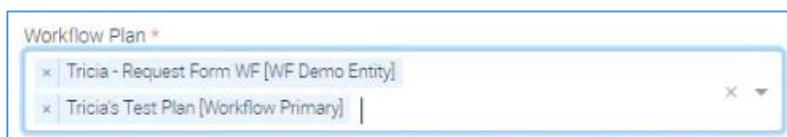


- **Workflow Reports:**

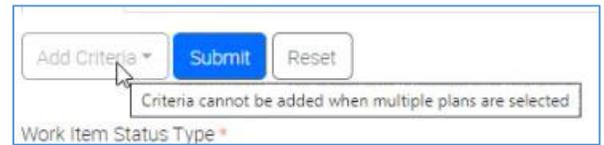
- Additional options added to the "Group By" drop down menu, allowing results to be grouped by the Attribute selected.



- Multiple Workflow plans can now be selected within the report Criteria:



Note: If multiple Workflow Plans are selected, the “Add Criteria” button is not available, and you cannot add custom attributes to the report results.

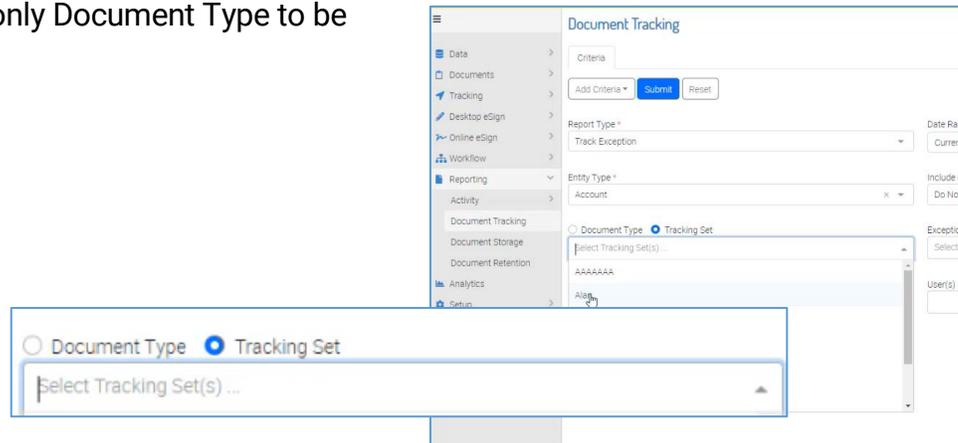


- Also in this new version, all columns within the report results are now sortable.

## TRACKING:

- **Tracking Reports:**

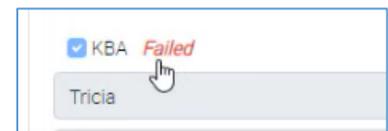
- Tracking Set can now be selected as part of the Report Criteria. Previous versions allowed for only Document Type to be selected.



## ONLINE ESIGN:

- **KBA:**

- If customer fails the KBA authentication, it will now be displayed within the package details.



- In addition, an email will be sent to the Sender indicating that the authentication failed. Failure email includes the reason for the failure:
  - *“Recipient failed authentication.”*
  - *“Recipient not found. The recipient was not found in the KBA provider database.”*
  - *“Thin file. The KBA provider does not have enough information on the recipient to generate questions.”*

## 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.