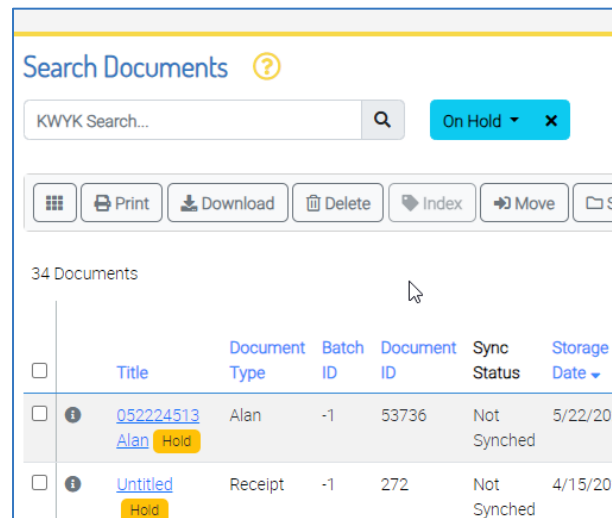
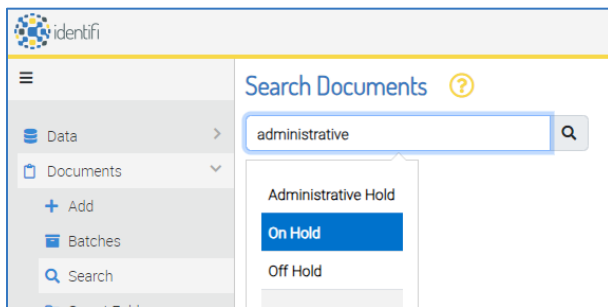


What's New in Identifi 24.2 (Upgrading from 24.1)

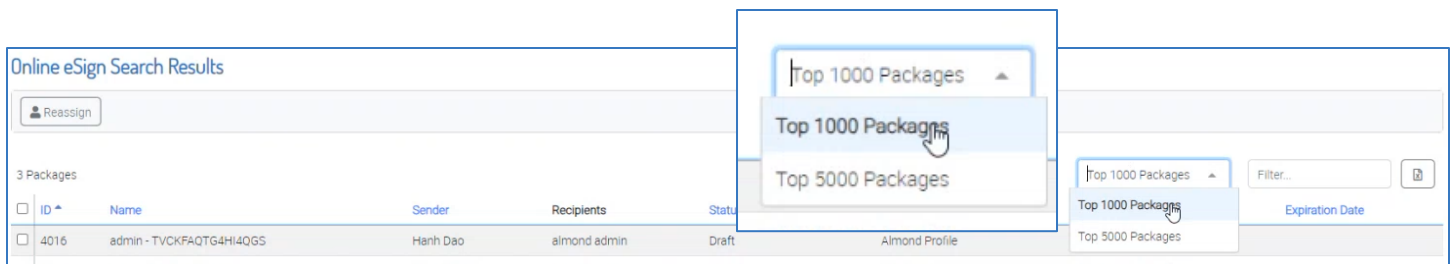
KWYK SEARCHING FOR DOCUMENTS WITH ADMINISTRATIVE HOLD STATUS

New in 24.2 is the ability to search for documents that have been placed on a Retention Hold (Administrative Hold). Documents that have been placed on Retention Hold can be searched within KWKY Search by typing **"Administrative Hold"** and selecting **"On Hold"** from the suggestion grid. In the same way, **"Off Hold"** documents can also be searched.



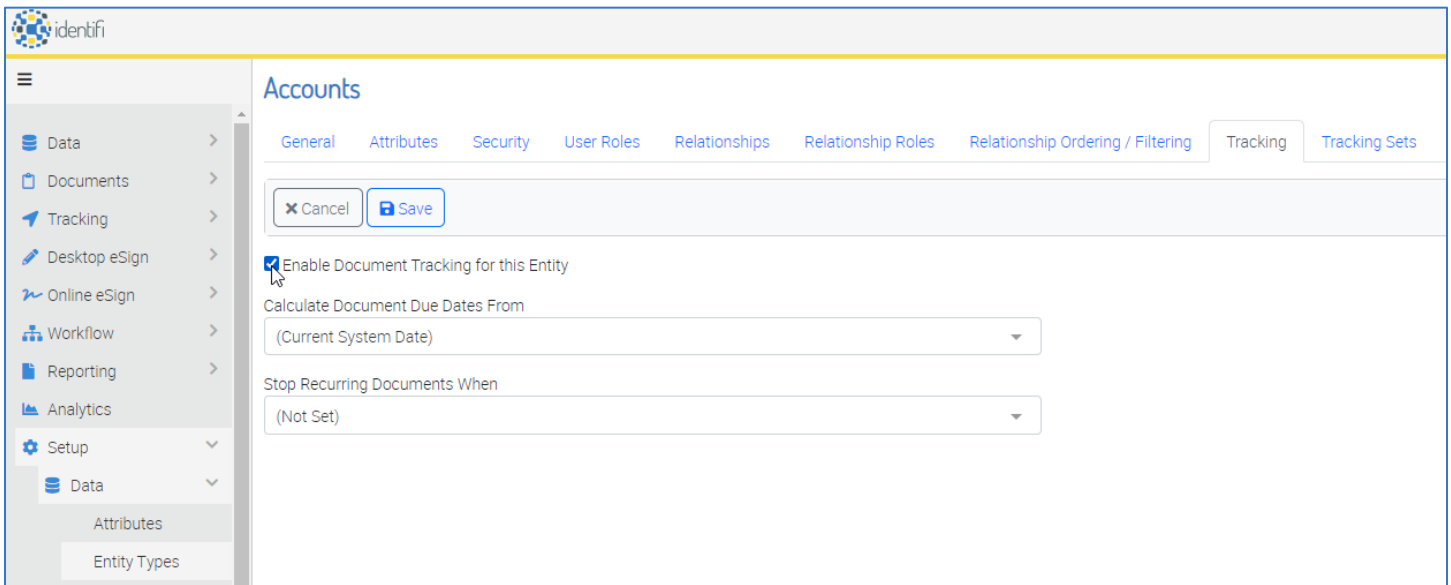
ONLINE ESIGN

OLE package search will now return 1000 results (instead of the original 500) and can be expanded to return up to 5000 results at a time.



TRACKING

The Tracking process has been modified to take advantage of the “**Enable Document Tracking**” flag within an Entity Type. With the addition of multiple Entity Types created for Workflows, having the ability to only flag the Tracking Entities (Customer, Account, etc.) enhances the speed of both Tracking notification and reconciliation processes.



Accounts

General | Attributes | Security | User Roles | Relationships | Relationship Roles | Relationship Ordering / Filtering | **Tracking** | Tracking Sets

Enable Document Tracking for this Entity

Calculate Document Due Dates From
 (Current System Date)

Stop Recurring Documents When
 (Not Set)

WORKFLOW

New in this version is the ability to replace *inactive* users within the Plan Designer of a Workflow Plan. Earlier versions did not allow for the replacement of a user who had been marked as inactive, as they would not appear in the drop-down list. With this version, both Inactive and Active users are presented.

SMART FOLDER EMAIL NOTIFICATIONS

Display Name has been replaced with **Document ID** within Smart Folder email notifications, as this could potentially contain sensitive information. The User is still able use the link embedded in the email to view documents; however the email now reflects “*updated documents*” and uses Document ID for the Activity detail.

Changes are for documents with activity newer than: "6/6/2024 7:10:58 AM"

You can [view the complete smart folder](#) , or just [the updated documents](#). The detailed changes are below.

To unsubscribe from this smart folder, adjust your [subscription settings](#).

Activity detail:

Document	Action	Date / Time	Performed By
Doc ID: 127396	Add	6/6/2024 8:03:05 AM	integr:
Doc ID: 127397	Add	6/6/2024 8:03:05 AM	integr:

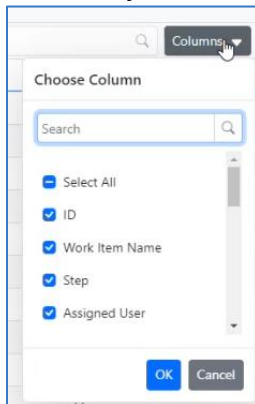
REPORTING ENHANCEMENTS:

In this release, we've introduced a new grid to both **Tracking** and **Workflow** reports.

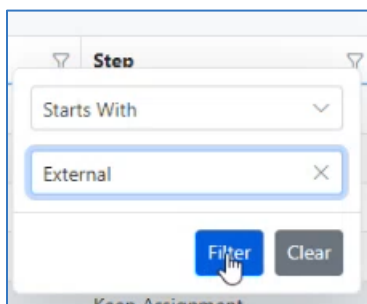
ID	Work Item Name	Step	Assigned User	Initiator	Started	Step Entered	Days in Step
1634433	fasdasdf	Keep Assignment	Chris Baston	Chris Baston	5/20/2024 12:25 PM	5/21/2024 12:26 PM	2
1634419	23434334343	Keep Assignment	Tricia Lolkus	Tricia Lolkus	5/6/2024 4:38 PM	5/7/2024 4:39 PM	16
1634310	34234	External	(Unassigned)	Tricia Lolkus	3/7/2024 12:52 PM	3/7/2024 12:52 PM	77
1634309	342343	External	(Unassigned)	Tricia Lolkus	3/7/2024 12:51 PM	3/7/2024 12:52 PM	77
1634098	2394389403	Keep Assignment	Tricia Lolkus	Tricia Lolkus	1/22/2024 3:38 PM	1/30/2024 12:17 PM	114
1624059	2398432043	Step 2	Tricia Lolkus	Tricia Lolkus	1/5/2024 5:08 PM	5/14/2024 12:30 PM	9
1623917	3343243	Keep Assignment	Tricia Lolkus	Tricia Lolkus	11/16/2023 2:31 PM	11/17/2023 2:34 PM	188
1613887	4345643	External	(Unassigned)	Tricia Lolkus	6/13/2023 9:51 AM	6/13/2023 9:51 AM	345
1613885	234532432	External	(Unassigned)	Tricia Lolkus	6/13/2023 9:33 AM	6/13/2023 9:42 AM	345
1613881	8989898	Keep Assignment	Tricia Lolkus	Tricia Lolkus	6/9/2023 4:53 PM	6/14/2023 4:32 PM	344
1613876	4523454354	Keep Assignment	Tricia Lolkus	Tricia Lolkus	6/8/2023 2:01 PM	5/14/2024 10:03 AM	9
1613873	8798798	Keep Assignment	Delete User	Tricia Lolkus	6/6/2023 2:28 PM	6/7/2023 2:28 PM	351
1613870	8756	Keep Assignment	Tricia Lolkus	Tricia Lolkus	6/2/2023 1:32 PM	5/21/2024 4:00 PM	2

The new grid allows for additional features, including:

- The ability to show/hide columns



- Filtering by any column shown in report results



- Multi-level sorting (hold down the “Ctrl” key on the keyboard as you select each level)

Assigned User	Started
Tricia Lolkus	6/2/2023 1:32 PM

- Moving of columns to reorder

Account Number	Assigned User	Started	Account Number
----------------	---------------	---------	----------------

- Dynamic grouping options within the report results

Drag a column header here to group its column

ID	Work Item Name	Assigned User	Account
First Name: - 2 items			
Step: Keep Assignment - 4 items			
1634433	fasdasdf	Chris Baston	fasdasdf
1613881	8989898	Tricia Lolkus	8989898
1613873	8798798	Delete User	8798798
1634419	23434334343	Tricia Lolkus	23434334
Step: Step 2 - 1 item			
1624059	2398432043	Tricia Lolkus	23984320
First Name: Tricia - 2 items			
Step: External - 4 items			

- Export data to PDF and Excel

Excel Export PDF Export

- The ability to **sum data** on plans with amount criteria

Work Items

Criteria Results

Add Criteria Submit Reset

Work Item Status Type* Active Work Items

Work Item Started Predefined Custom Last 360 Days 5/29/2023 - 5/23/2024

Workflow Plan* Invoice [Invoice]

Workflow Steps Select Optional Workflow Step(s) ...

Assigned Users Select Optional Assigned Users(s) ...

Initiated Users Select Optional Initiated Users(s) ...

Minimum Days in Step Optional days in step >= this value ...

Group By None

Sum Invoice Amount

Search By Work Item ID

Results

5 Results

Results Save Report

Drag a column header here to group its column

Excel Export PDF Export

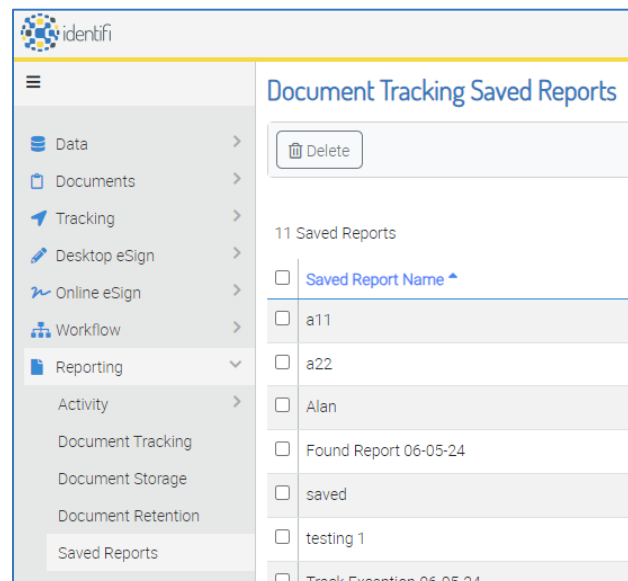
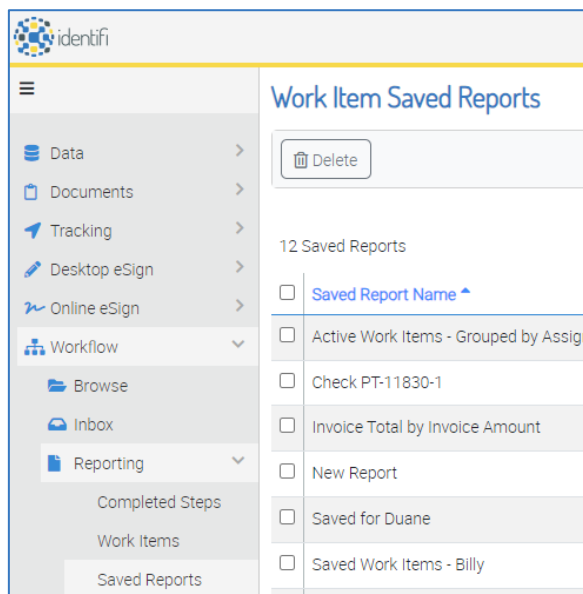
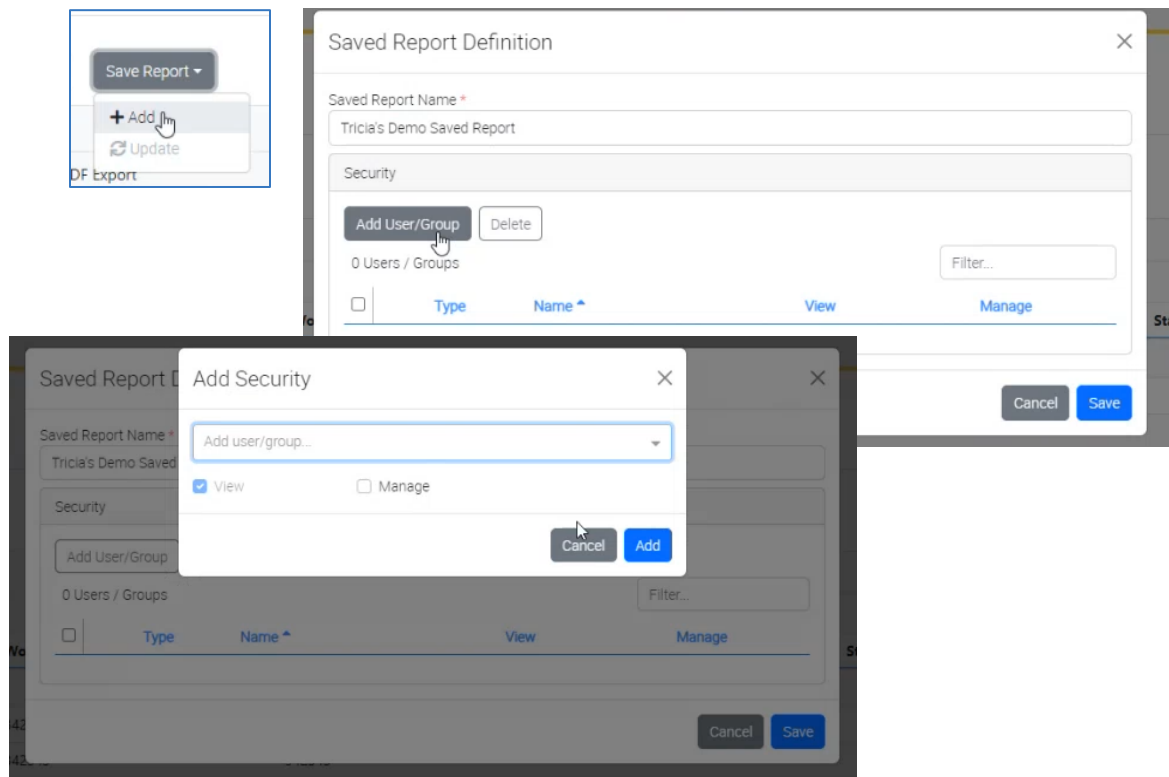
Work Item Na...	Step	Assigned User	Initiator	Started	Step Entered	Days in Step	Invoice Amount
Invoice #:323432	Step 1	Tricia Lolkus	Tricia Lolkus	5/22/2024 2:42 PM	5/22/2024 2:42 PM	1	\$39,293.00
Invoice #:90327832	Step 1	Tricia Lolkus	Tricia Lolkus	5/22/2024 2:41 PM	5/22/2024 2:41 PM	1	\$93,892.00
Invoice #:329382	Step 1	Tricia Lolkus	Tricia Lolkus	5/22/2024 2:41 PM	5/22/2024 2:41 PM	1	\$28,377.00
Invoice #:324309	Step 1	Tricia Lolkus	Tricia Lolkus	5/22/2024 2:41 PM	5/22/2024 2:41 PM	1	\$1,382.00
Invoice #:238472934	Step 1	Tricia Lolkus	Tricia Lolkus	5/7/2024 2:24 PM	5/7/2024 2:24 PM	16	\$10,000.00
Total:							\$172,944.00

- Links change colors when clicked

1634433	fasdasdf
1613881	8989898
1613873	8798798
1613870	8756
1613876	4523454354
1613887	4345643
1634309	342343

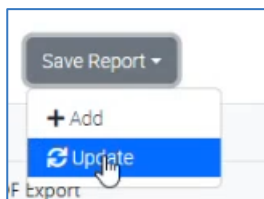
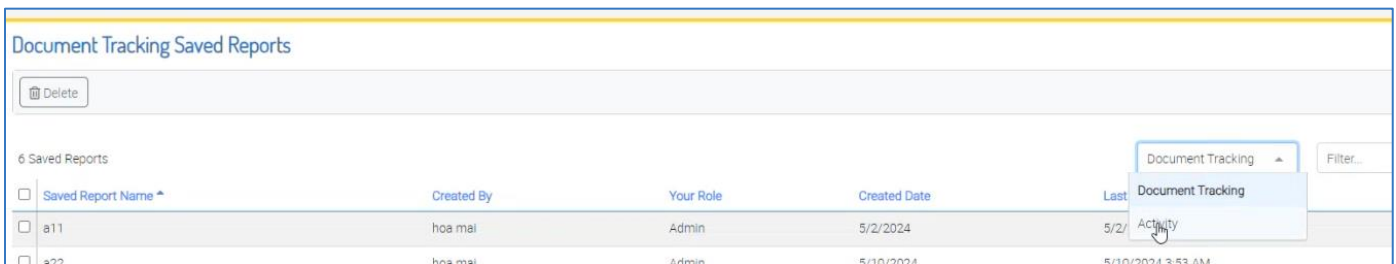
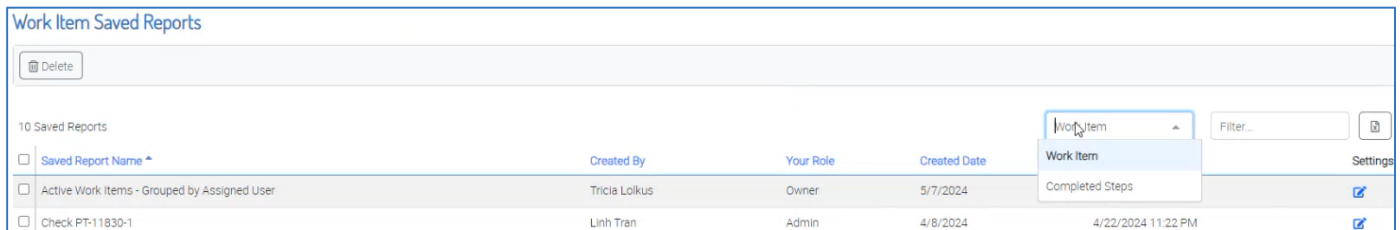
- **Saved Reports** - Also new for **Workflow** and **Tracking** reports is the option to **save the report results** within the menu.

Click **“Save Report”** from the results tab, define the Report Name and any optional security for the report and click **“Save.”** Security can be set for the user to **View** the report only, or **Manage** the report, allowing them to change the criteria and results options.



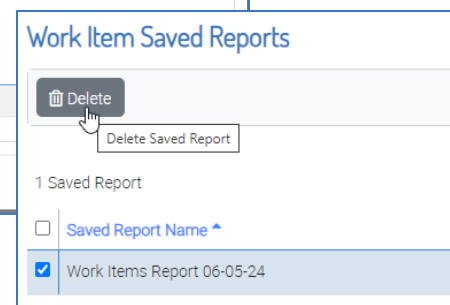
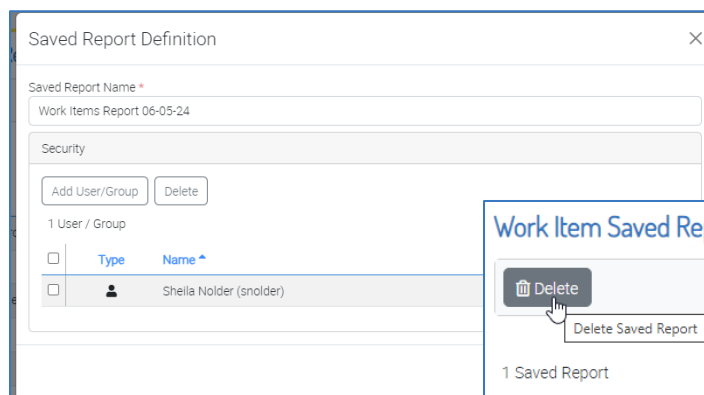
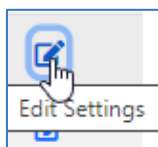
Earlier versions of Identifi, and still in some existing reports within this new version, provide the ability to bookmark the URL to return to report results. This new feature will allow the User to save the report within a “Saved Reports” section of the menu.

Within the Saved Reports menu, a user can view all saved reports to which they have permission. Choose the filter Report Type from a drop down:



The saved report criteria can be edited and updated (pending permission).

The report settings can also be edited (pending permission) to redefine the Report Name or Security assigned.



The report can be deleted from the Saved Report list (pending permission).

Work Item Saved Reports

Delete
Delete Saved Report

1 Saved Report

Work Item 06-05

<input type="checkbox"/>	Saved Report Name ^	Created By	Your Role	Created Date	Last Modified Date	Settings
<input checked="" type="checkbox"/>	Work Items Report 06-05-24	Sheila Nolder	Owner	6/5/2024	6/5/2024 4:19 PM	

ADDITIONAL REPORTING ENHANCEMENTS:

Reporting

- Activity
- Batch Indexing
- Document

Within the results for **Document Activity** and **System Access Activity** reports, a user can now sort results on *all* columns, rather than just the Activity Date.

Criteria Results

3 Activities

Top 1000 Activities Filter...

Activity Date ^	Activity Type	User Name	Last Name	First Name	Application	Document ID	Document Display Name
6/3/2024 8:35 AM	Add	integraCIPRI	CIPRI	integra	CIF-Customers	109	123456789.COMMITMENT LETTER-CIF 2020/02/19
6/4/2024 8:35 AM	Add	integraCIPRI	CIPRI	integra	CIF-Customers	10109	123456789.COMMITMENT LETTER-CIF 2020/02/19

Batches Scanned Report

Reporting

- Activity
- Batch Indexing
- Batches Scanned

This new **Activity** report has been added and displays a summary of batches scanned by a User using the Scan Client (*Note: does not include batches created using the Add feature or Uplink*).

This report also has the new enhanced results grid available with Tracking and Workflow reports, as outlined above.

Batches Scanned Summary

Criteria Results

Displaying 79 Results

Top 1000 Results Save Report

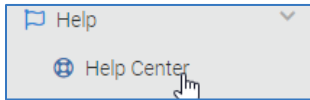
Drag a column header here to group its column

Excel Export PDF Export

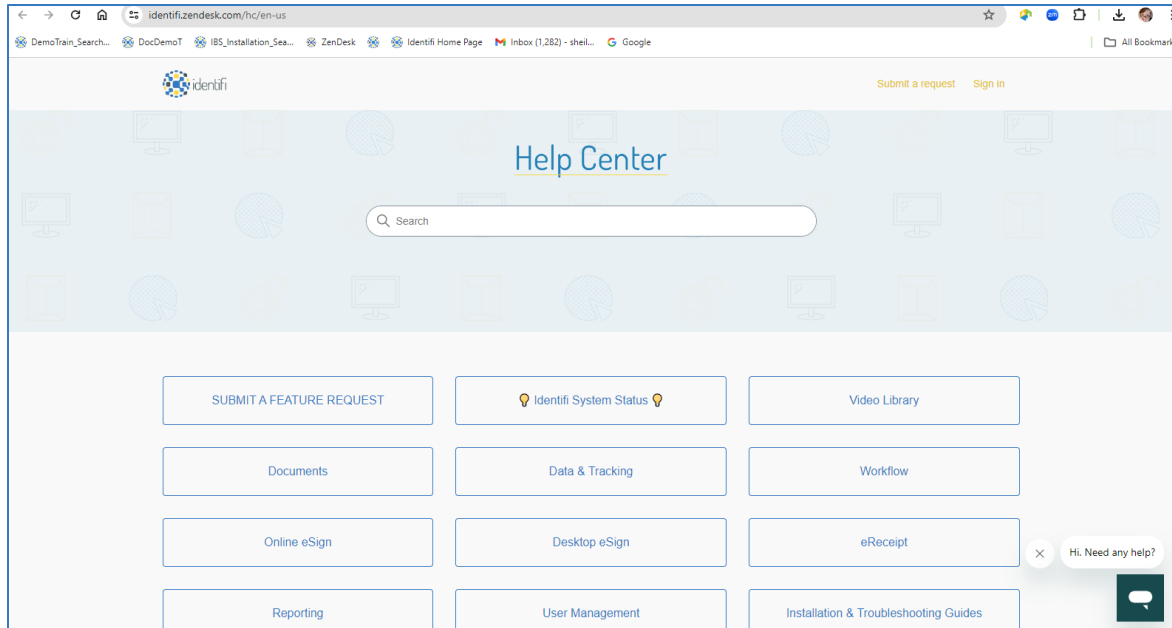
Batch ID	User Name	Scan Plan Name	Page Count	Storage Date
8898	hdao	Almond	1	5/14/2024
8896	hdao	Almond	1	5/14/2024
6772	hdao	Almond	4	4/23/2024

REVISED HELP MENU LINKS:

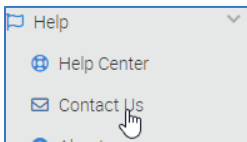
Help Menu links have been renamed for clarity. The former “Documentation” link is now titled “Help Center,” and “Support” is now “Contact Us.”



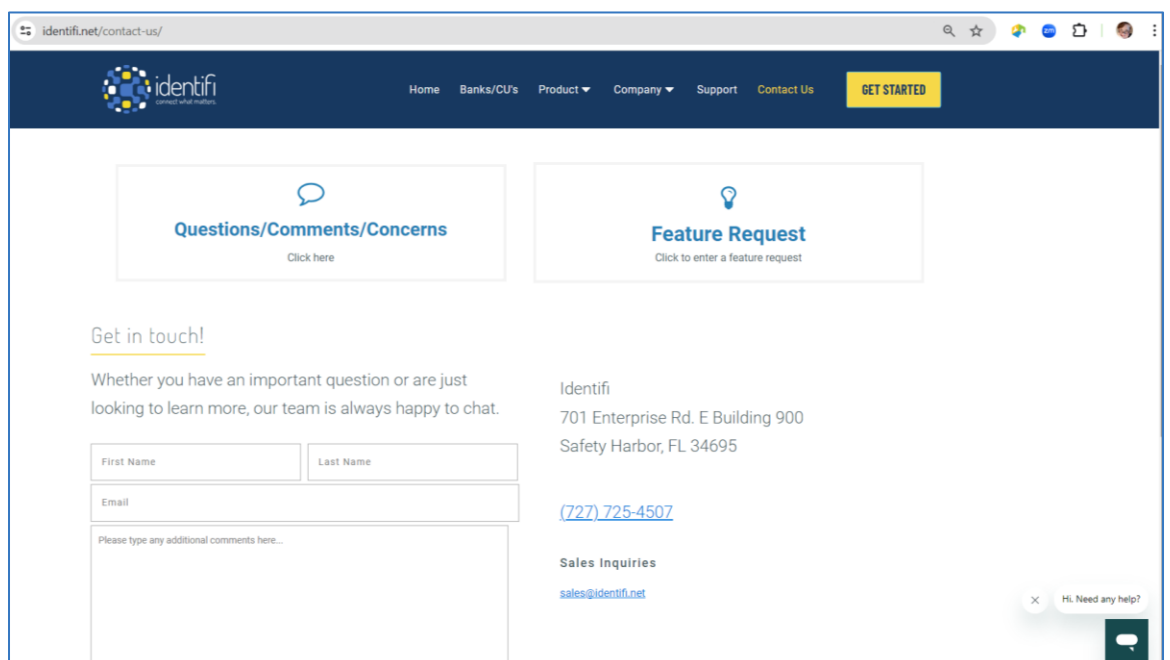
Clicking on the **Help Center** link from the main menu will launch the Identifi Help Center in a separate tab and will provide links to articles and videos pertaining to topics within the Documentation Library.



Contact Us



Clicking on **Contact Us** will direct the User to the Identifi website “Contact Us” page to submit feedback or a feature request.



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.