

What's New in Identifi 24.4

(Upgrading from 24.3)

<u>DATA</u>

• Display what Entities Contain an Attribute

 Under the Attribute Details page, in addition to being able to view the Documents associated with the Attribute, there is now a tab that displays the Entities that contain the Attribute.

identifi			
≡		Address 1	
🛢 Data	>	General Document Types Entity Types Value Security (Document)	Dictionary Usage
📋 Documents	>		
┥ Tracking	>	4 Entity Types	
🧪 Desktop eSign	>	ID Entity Type	
≁ Online eSign	>	2 Customer	
👬 Workflow	>	3 Property Collateral	
Reporting	>	1087 Almond Test	
🗢 Setup	~	1104 almond entity	
🛢 Data	~		
Attributes			

Import Key Visible to both Admins and System Admins

 In the previous version, only System Administrators could configure and view the Import Key, which relates to the configuration and setup of BLI's. The Import Key is also used by the Tracking module, but an Administrator was unable to see if an Import Key was configured, so in the new version the Import Key is also visible to Administrators.

🤹 identifi														<u>*</u> *
≡		Aco	counts											
🛢 Data	>	G	eneral Attributes	Security User Roles	Relationship	s Relation	ship Roles	Relationship Orderin	g / Filtering Tra	cking Tracl	king Sets			
📋 Documents	>													
1 Tracking	>	-	Add 🗊 Delete	♦ Sequence										
🥒 Desktop eSign	>	22	Attributoo						0			(Hat	tor	
≁ Online eSign	>	23	Attributes					I	-8			L.		
👬 Workflow	>		Name	ID Data Type	Dictionary	Sequence [▲]	Required	Editable Searchable	Wildcard Searchable	Search Results	Detail	General Key	Import Key	Monitor for Changes
Reporting	>		Account Number	1 String (50)	None	1	~	~		~	~	~	~	
🕸 Setup	~		Account Type	2 String (255)	Automatic	2	2	~		~	~		\smile	2
🛢 Data	~	_	Accountrype	2 Stilling (200)	Automatic	2	•	•		•	•			•
Attributes			Major Type	20 String (15)	Automatic	3	~	~		~	~			~
Entity Types			Minor Type	24 String (10)	Automatic	4	~	~		~	~			~
	- 1		Current Balance	13 Currency	None	5	~	<i></i>			~			~



- Group Sync Configuration
 - Provides the ability to sync Azure groups with Identifi.
 - Can be managed within Azure and synced to Identifi; no longer having to manage them in two places.
 - Only applicable to Azure.
 - Located under Setup->People->Groups-> Manage Groups

🗘 Setup	~		
🛢 Data	>	N 0	Manage Groups
Documents	>	Manage Groups	Group List Group Sync
🖵 Desktop eSign	>	Group List Group Sync	Castanation
2 Online eSign	>	croop List Croop The	Conliguration
🖾 Imaging	>		E Edit
C eReceipt	>	+ Add Delete Export Security	-0-
😩 People	~		Enable Group Sync
Groups			

• Once configurations are in place, the "Link Groups" section will display Azure Active Directory groups available to link.

Manage Groups			
Group List Group Sync			
Configuration			
I Edit			
Enable Group Sync			
Tenant ID *			
Link Groups			
91c3defa-c082-467e-8d38		Edv******	Change Secret
PR ode			
Link Groups			
😰 Edit			
Select External Groups to I	ups to Link		*
New group Download g Microsoft Entra has a simple LogiGear Test Lab Users			
OLE Senders	Link Groups		
Search mode Contains The Minions	X Cancel		
Select External Groups to L	Select External Groups to Link		
Name t	External Group	Internal Group	
Administrators	Administrators	Administrators	La Delete
Group Sync Test Abhi		Administrators	
LogiGear Test Lab Users			
OLE Senders OLE S	enders		(Create New Group)
The Minions			63



- Choose the Azure Group (External Group) and select the Internal Group that is to be linked (or create a new one if none exists) and click "Save."
- Groups will be linked, and any users who were not in Identifi will be added to the User list through the sync process.

Select External Groups to Link			
External Group	Internal Group		
Administrators	Administrators	Ŧ	Subscription
The Minions	Minions	*	Subscription
OLE Senders	OLE Senders	*	Subscription

Manage Groups	
Group List Group Sync	
+ Add) Delete) LExport Security	
7 Groups	Filter
Group Name *	
(All Users)	
Administrators	Synced
Log/Gear Test Lab Users	
Minions	Synced
Northerners	
OLE Senders	Synced
Southerners	

OLE Sen	ders (S	ynced With: OLE Senders)
General	Users	Roles
This group	p is synced	with an external system. User membership is managed externally.
Re-Syr	10	
5 Lisers		

DOCUMENTS

- Soft Delete of Documents
 - When enabled, soft delete allows for the self-serve recovery of documents that were manually deleted by users from KWYK Search results.
 - Automatically enabled upon upgrade.
 - Default number of days to keep documents will be 30 days, but this can be changed; maximum is 730 days.
 - Listed under System-Settings and viewable by System Administrators.
 (Note: Contact Identifi Support if this setting is not visible in your installation.)



🗘 Setup	~	System Settings
🛢 Data	>	System Settings
Documents	>	Frit
🖵 Desktop eSign	>	
≁ Online eSign	>	Conoral Cattinga
Imaging	>	General Settings
C eReceipt	>	Installation Internal Name
🚢 People	>	CIPRI
1 Tracking	>	
😂 System	~	Business Environment Type
Clients		
Installers		Days to keep Deleted Doguments
Settings		30
Sinale Sian-On	6	0 indicates documents are deleted immediately; maximum value is 730 days

- Soft deleted documents reside in a specific "Recovery" section of the menu.
- A user can recover anything they, themselves, have deleted; an Admin can recover any documents that were deleted by any user.
- Automatic retention will not delete documents that are marked for soft delete.



Document Recovery				
Criteria Results				
+ Recover Delete				
1 Recoverable Document Set				
Date Deleted	User	Total	Recovery Expiration Date	Criteria
11/18/2024 4:37 PM	Tricia Lolkus (tlolkus)	7	12/18/2024 4:37 PM	Application: Accounts, Account Number: 2398432043



<u>WORKFLOW</u>

• Workflow Saved Reports – Work Item reports can now be filtered by "All."

identifi					
=	Workflow Saved Reports				
🛢 Data >	Delete				
📋 Documents >					
◀ Tracking >	7 Saved Denorts				
🥒 Desktop eSign 💦 >				(7.11)	
≁ Online eSign >	Saved Report Name *	Created By	Your Role	Cre (All)	lif
👬 Workflow 🗸	Active Work Items - Grouped by Assigned User	Tricia Lolkus	Admin	5/7 Work Item	12
늘 Browse	Saved Work Items - Billy	Billy Hartman	Admin	4/2 Completed Steps	
🖴 Inbox	Tricia's Workplan Saved Report	Tricia Lolkus	Admin	5/23/2024	11/15/202
🖹 Reporting 🗸 🗸	Work Item Report _ Multi Plan	Tricia Lolkus	Admin	5/7/2024	5/7/2024
Completed Steps	Work Items Report 06-05-24	Sheila Nolder	Owner	6/5/2024	6/5/2024
Work Items	Workflow Active - Group by Step 2	Tricia3 Lolkus	Admin	5/7/2024	5/7/2024
Saved Reports	Workton Depart 00	Dilly Hortmon	Admin	4/0/2024	0/10/202/

- External Forms will now have a "Save for Later" option to skip required fields.
 - Allows the person completing the form to save what has been entered and come back to it at a later time without having to re-enter all of the previous information.

Workflow Primary					
Email Address	First Name		Last Name		Account Number
tlolkus@identifi.net	Tricia		Lolkus		34234
Status Active2	Required Value *				
Document Attachments	Required	value *			
werere					
Choose File No file chosen					
werere					-
Choose File No file chosen					
werere			Save	e For Later	
Choose File No file chosen				4 U	
		Step 1 End	Step 2 Save For Later		
Save Or Discard Form	Changes		Your Form	n Data has b	een Saved!
The form has been edited. Do yo discard them?	want to save the changes to the form or	0	We have sent a It contains a link that will allow	message to "tlol you to come bac	kus@identifi.net". k and complete your submission.
	Discard		Click here	<u>to go back to you</u>	ur form now!



 If the person completing the form skips the required field and attempts to finish or move forward, the form will not allow them to proceed until the required information is entered.

		0	
his field is required.			
	Ster En	d Step 2	Save For Later

- **Multi-line fields** are now supported and can be up to 10 lines deep, with some additional flexibility to expand the field in order to view the field contents.
 - Specify the number of lines needed, up to 10.

Save				
First Name Last Name	PhoneNumber		Field: aa String Delete Field Custom Label	
Account Number * Email Address	Document Date		Multr Line Field Help Text Default Value	
Status		(Number of Lines	
Large Dictionary Test ReportType			3 4 5 6 7 8 9 10	
Multi Line Field Here is a long field	L≩	ß		
			<i>I</i>	



- **Doc Sets** are now configurable when creating Workflow steps, allowing for multiple documents to be added to the step without having to enter each Document Type name.
 - When entering documents to display, individual documents can be listed (standard) as well as document groups.



 Plan level configuration for Doc Types – allows for the restriction of Document Types to only those applicable to the Workflow rather than all Document Types that contain the General Key Attributes.



- Start a Workflow Item added to Document Detail screen to kick off a Workflow.
 - From the Document Detail Viewer, a Workflow can be started within the "Info" panel.

Index Not	tes Related	Info
• File Info	Permissions	Actions -
1 Version Version	Created By	Upload Rescan Place On Hold
1	tiolkus	Start Waldlaw

- Available if the user opening the document has indexing permissions for that Application.
- The document type must also be configured within the Workflow Plan to start a workflow.



Print Cancel

<u>REPORTING</u>

•

• **Tracking Reports** – Allow for the inclusion of "Unknown User" when grouping by related user and filtering by Roles.

=	Document Tracking 🕜			
🛢 Data >	Criteria			
Documents >				
✓ Tracking >	Add Criteria Submit Reset			
🧪 Desktop eSign 💦 📏	Report Type *	Date Range 💿 Pr	edefined 🔿 Cust	om
≁ Online eSign	Track Exception	Last 360 Days	×	12/22/2023 - 12/16/2
👬 Workflow 🔷 🗧				
🖹 Reporting 🗸 🗸	Entity Type *	Assigned User		
Activity	Account			
Document Tracking		Unknown Users		
Document Storage	Select Document Type () Tracking Set	hoa		
Document Retention		LOFF		
Saved Reports	User(s)	OEMP		
Ourters De la	Select Related Users(s)	× ACTO		;
Setup	Group by related user	Exclude Unknow	vn User Print	12 sheets of
Setup Costing Grid Print option ac	Group by related user	Exclude Unknov	vn User Print Destination	12 sheets of
Setup	Group by related user	Exclude Unknov	vn User Print Destination Pages	12 sheets of Canon TR8600 series Canon TR8600 series iDentificeReceipt
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• Collapse option within the grid will collapse and re-expand results.



Criteria Results	oup By Role with Unknown 🕜		
Displaying 265 Results			
Top 1000 Results Save Report Collapse roups			
User 🔶 🗙	Document Tracking (Saved Report): Track Report Grou		
🗵 Excel Export 🛛 PDF Export 🕞 Print	Criteria Results		
Account Title \heartsuit Due Date $1 \uparrow \heartsuit$ Document			
> User: A Gnu User (GUser) - 2 items	Displaying 265 Results		
> User: Chad Sheridan (csheridan) - 2 items	Top 1000 Results Save Report Collapse proups		
> User: Duane Ryder (dryder) - 4 items	User ↑ ×		
> User: Tricia Lolkus (tlolkus) - 2 items	🛛 Excel Export 🔺 PDF Export 🕞 Print		
> User: Unknown - 255 items	Account Title \bigtriangledown Due Date 1 \uparrow \heartsuit Document Ty		
	V User: A Gnu User (GUser) - 2 items		
	011724.1020 - 9/21/2024 001		
	011724.1020 - 10/21/2024 001		

• When exporting a report (Excel or .pdf), the name of the report is now part of the export file title and is the title of the report when the file is opened.

Document Tracking (Saved Report): Track	Report Document Tracking (Saved Report
Criteria Results	Criteria Results
Displaying 97 Results	Displaying 97 Results
Top 1000 Results ▼ Save Report ▼ Colla	Iop 1000 Results ▼ Save Report ▼
Due Date ↑ ×	Due Date ↑ ×
Excel Export DPF Export Print	Excel Export PDF Export
	Account Title PDF Export
A1 ~	: $\times \checkmark f_x \checkmark$ Document Tracking (Saved Report): Track Report
Document Tracking (Saved R 1 2 A	B C D E F G H I
8.6 KB • Done 1 Do	ument Tracking (Saved Report): Track Report
2 Acco	nt Grace Account Account Branch N Close Date Current Balance
3 Due	0ate: 12/1/2024 - 14 items
Document Tracking (Saver C Z Track Report.pdf	ocument Tracking (Saved Report): Track Report
23.4 KB • Done	Account Title Grace Account Number Account Type
	Due Date: 12/1/2024 - 14 item

OTHER NOTABLE CHANGES

• Analytics has been retired and is no longer visible within the Identifi menu.