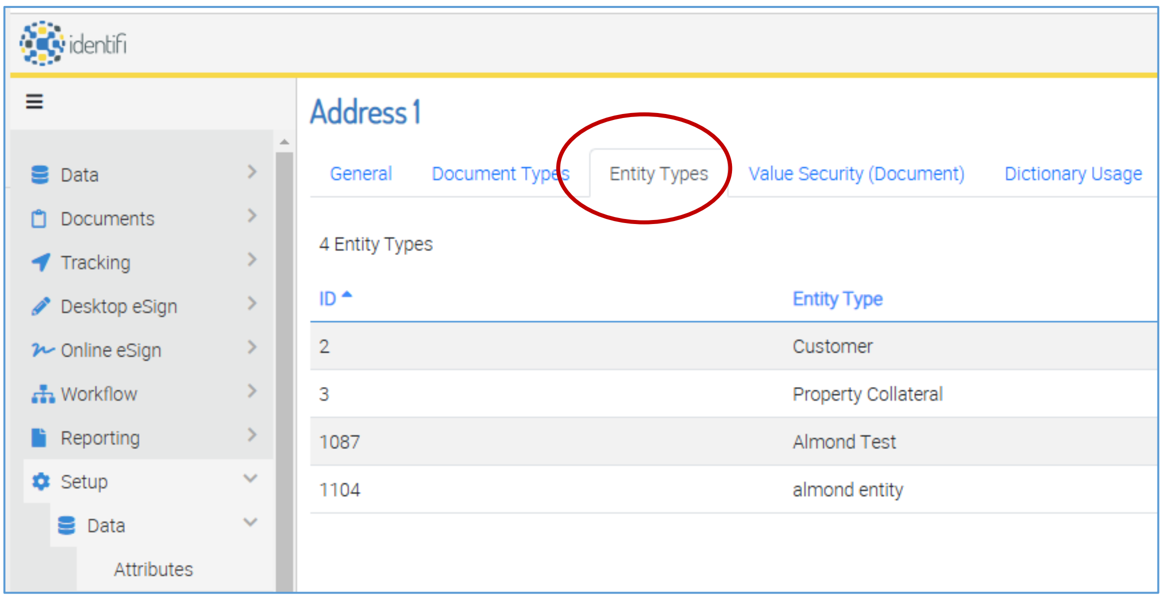
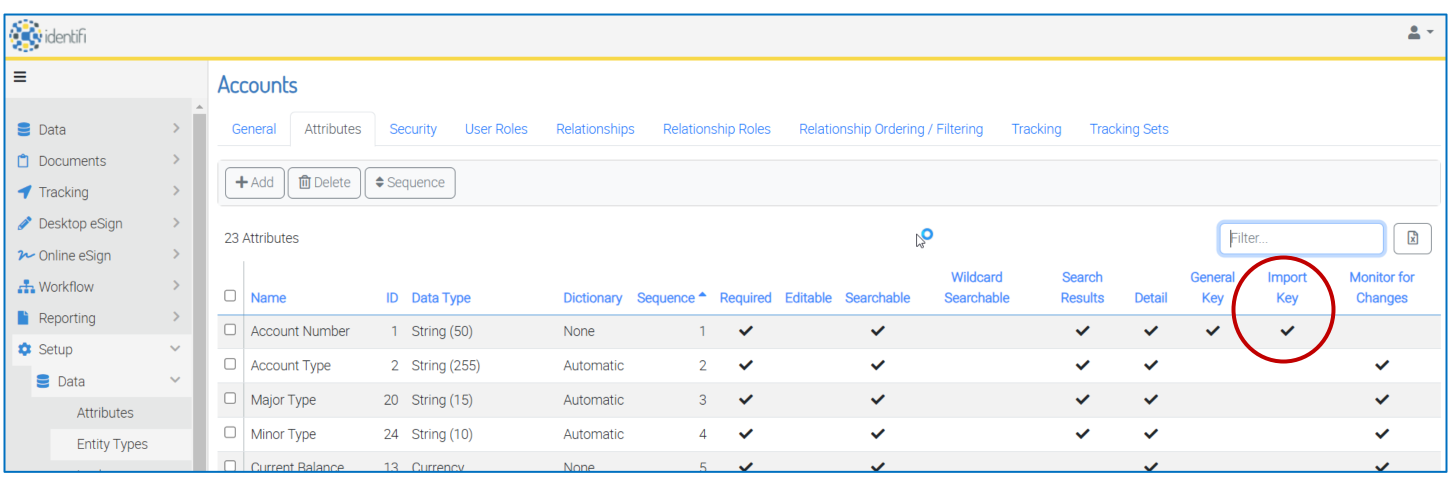
What's New in Identifi 24.4
(Upgrading from 24.3)

DATA

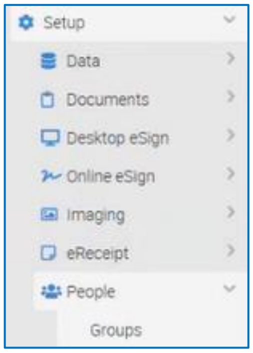
- **Display what Entities Contain an Attribute**
  - Under the Attribute Details page, in addition to being able to view the Documents associated with the Attribute, there is now a tab that displays the Entities that contain the Attribute.

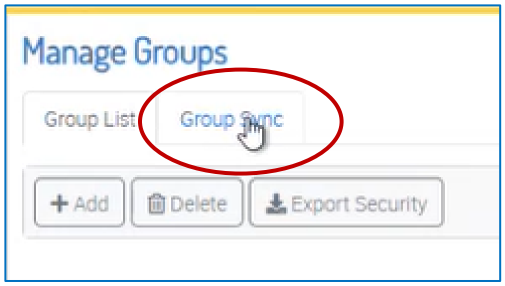


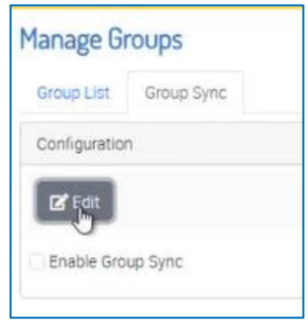
- **Import Key Visible to both Admins and System Admins**
  - In the previous version, only System Administrators could configure and view the Import Key, which relates to the configuration and setup of BLI's. The Import Key is also used by the Tracking module, but an Administrator was unable to see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



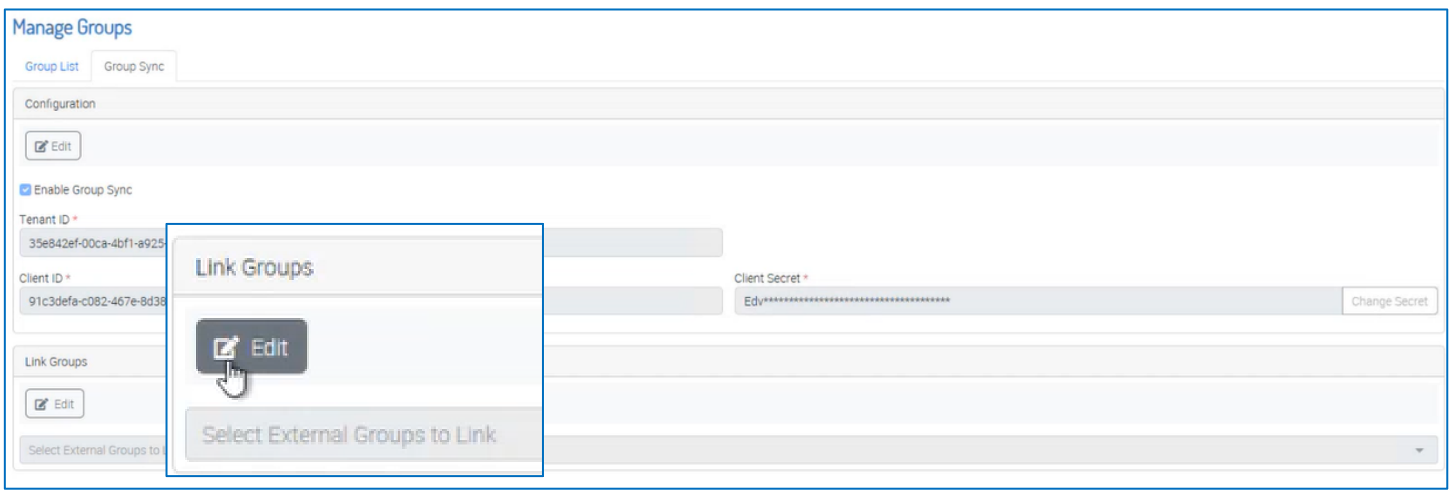
- **Group Sync Configuration**
  - Provides the ability to sync Azure groups with Identifi.
  - Can be managed within Azure and synced to Identifi; no longer having to manage them in two places.
  - Only applicable to Azure.
  - Located under ***Setup->People->Groups-> Manage Groups***

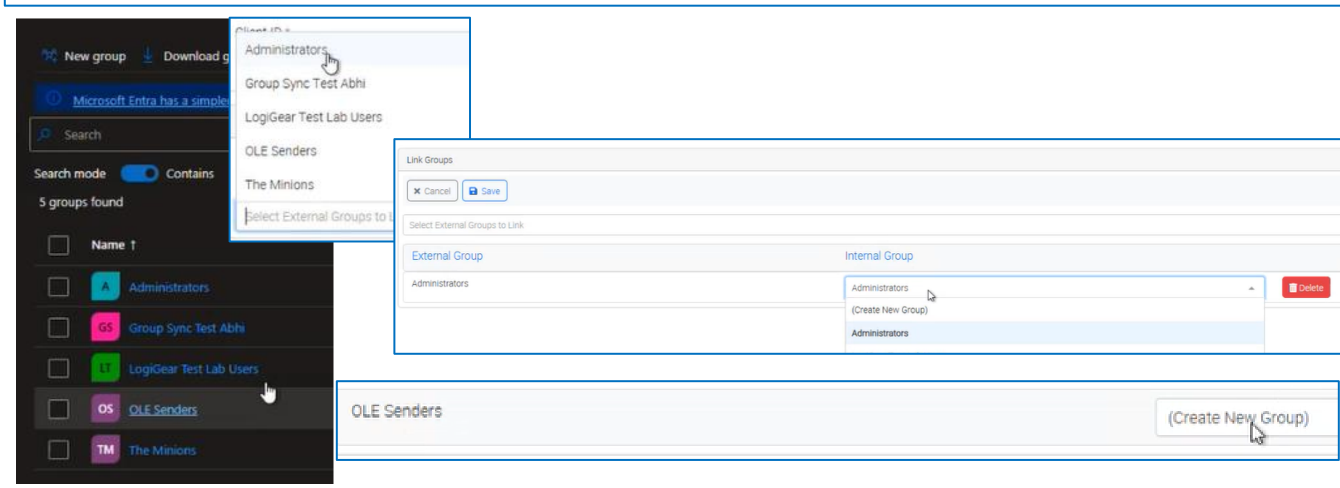




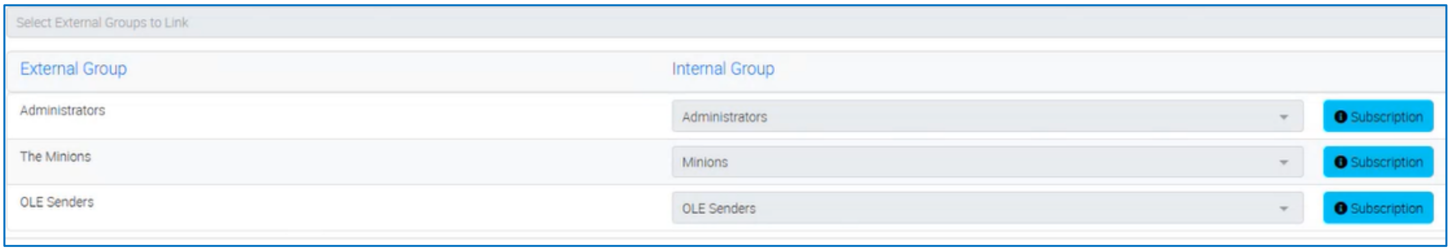


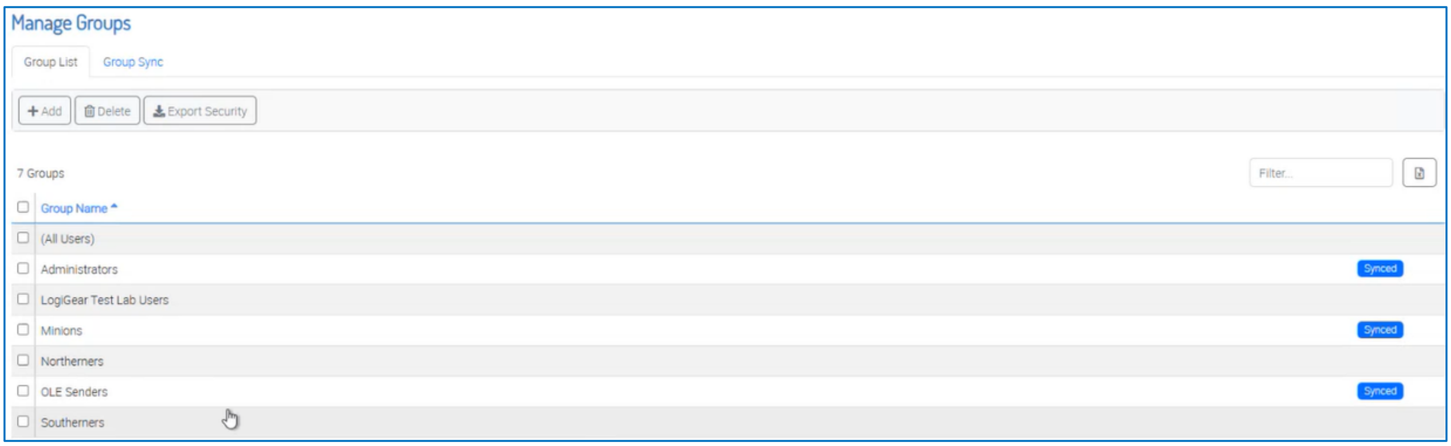
  - Once configurations are in place, the “Link Groups” section will display Azure Active Directory groups available to link.

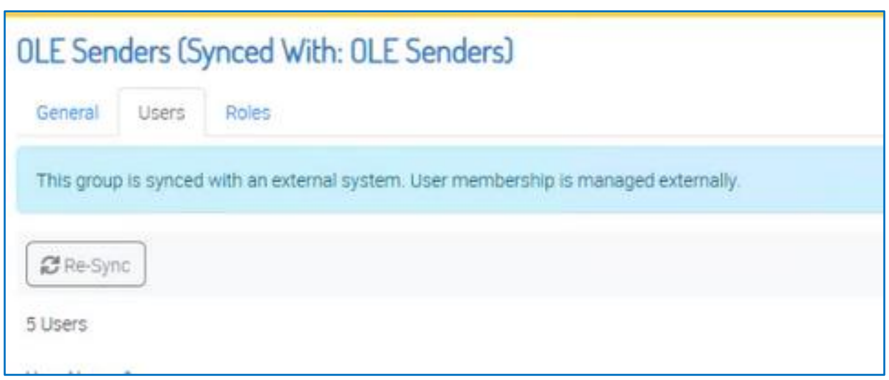




- Choose the Azure Group (External Group) and select the Internal Group that is to be linked (or create a new one if none exists) and click “Save.”
- Groups will be linked, and any users who were not in Identifi will be added to the User list through the sync process.

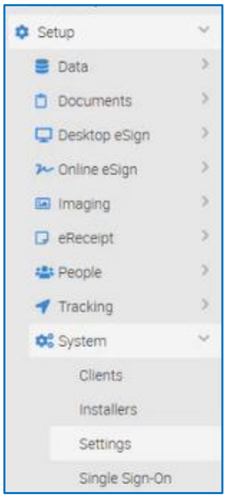


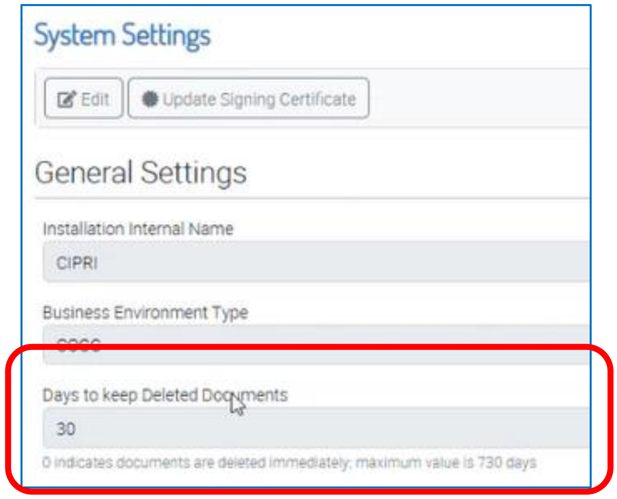




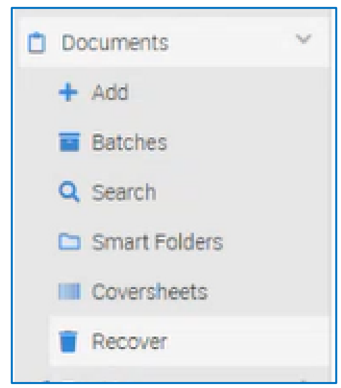
DOCUMENTS

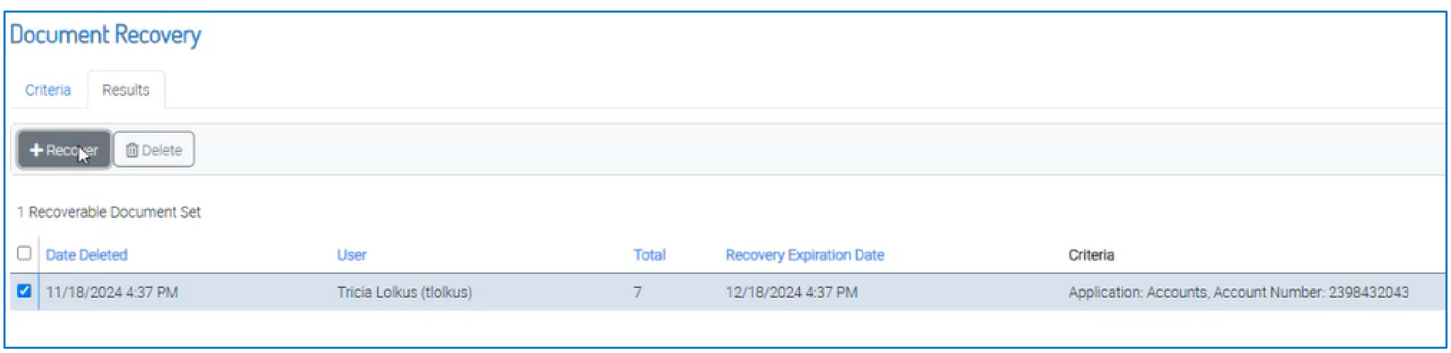
- **Soft Delete of Documents**
  - When enabled, soft delete allows for the self-serve recovery of documents that were manually deleted by users from KWYK Search results.
  - Automatically enabled upon upgrade.
  - Default number of days to keep documents will be 30 days, but this can be changed; maximum 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.)*





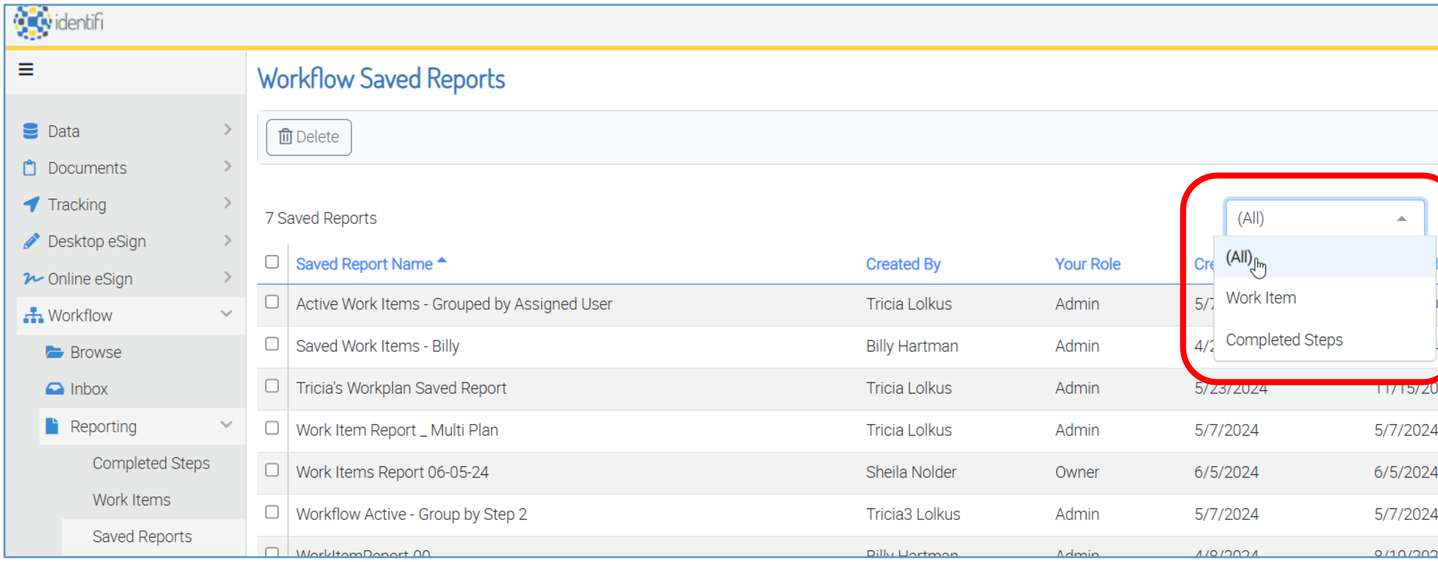
- Soft deleted documents reside in a specific “Recovery” section of the menu.
- A user can recover anything they, themselves, have deleted; an Admin can recover any documents that were deleted by any user.
- Automatic retention will not delete documents that are marked for soft delete.



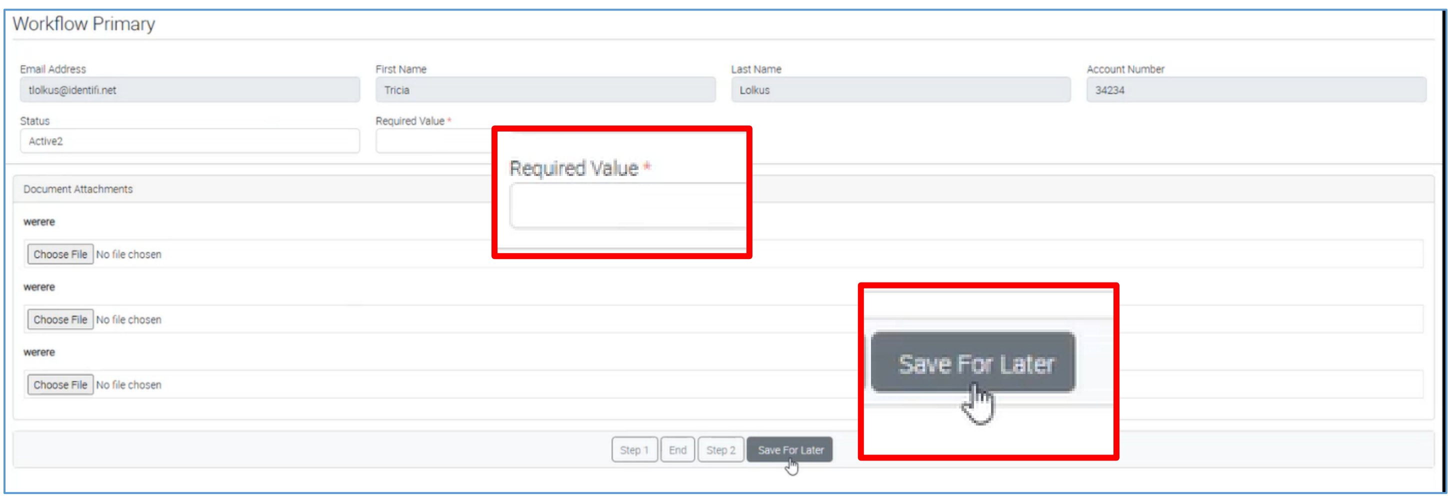


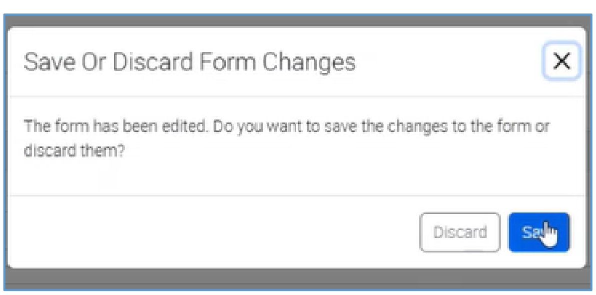
WORKFLOW

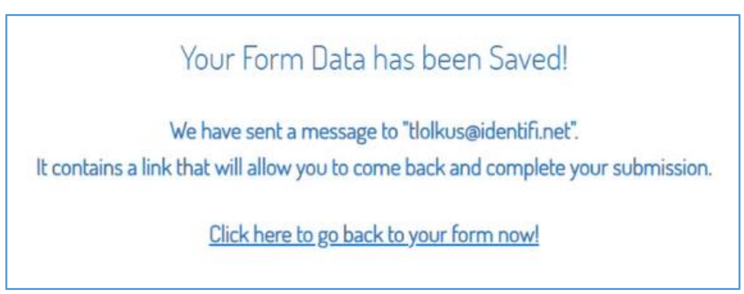
- **Workflow Saved Reports –** Work Item reports can now be filtered by "All."



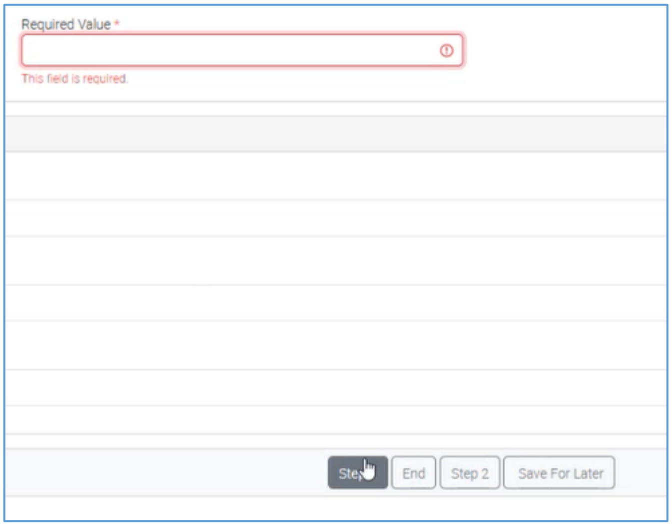
- **External Forms** will now have a "Save for Later" option to skip required fields.
  - Allows the person completing the form to save what has been entered and come back to it at a later time without having to re-enter all of the previous information.



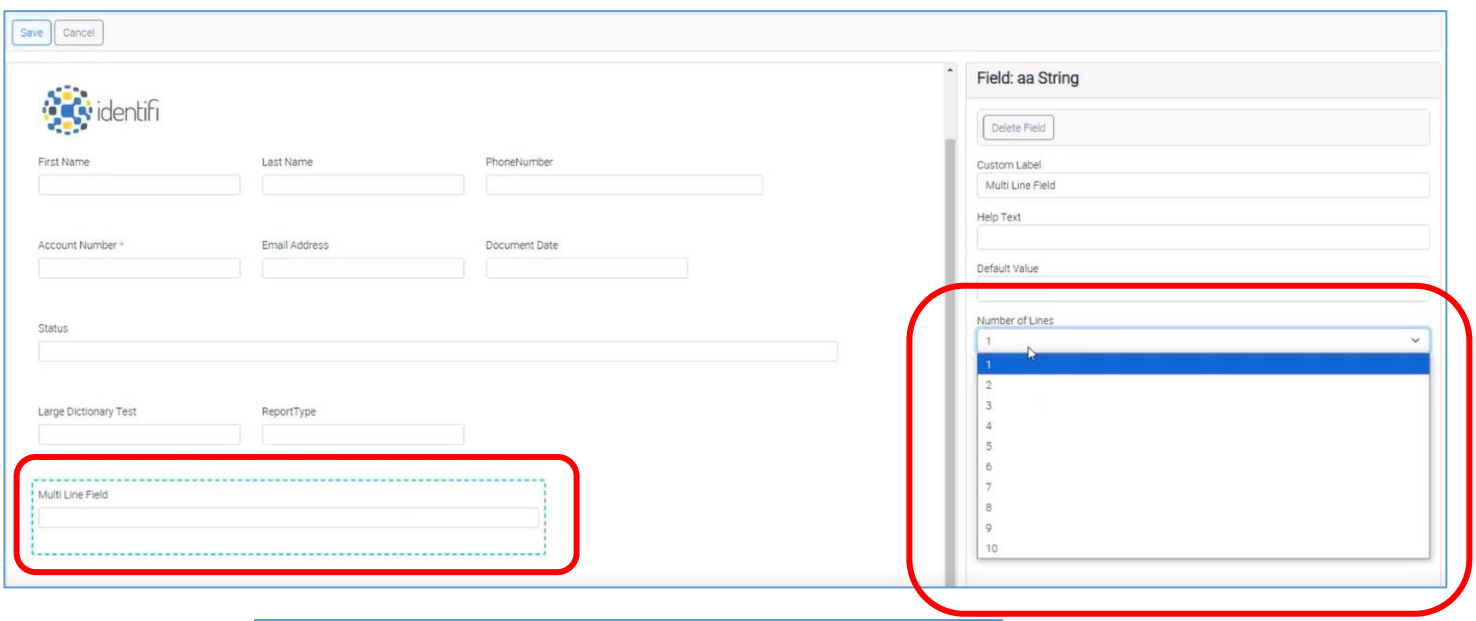


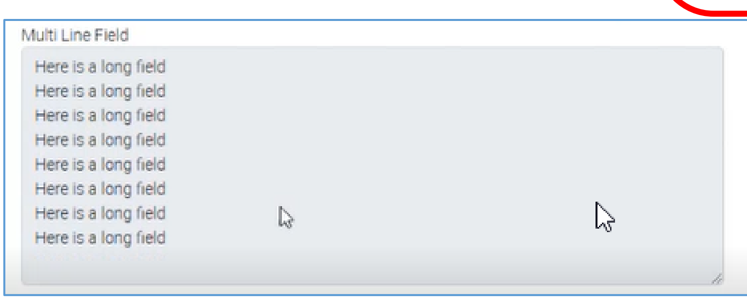


- If the person completing the form skips the required field and attempts to finish or move forward, the form will not allow them to proceed until the required information is entered.

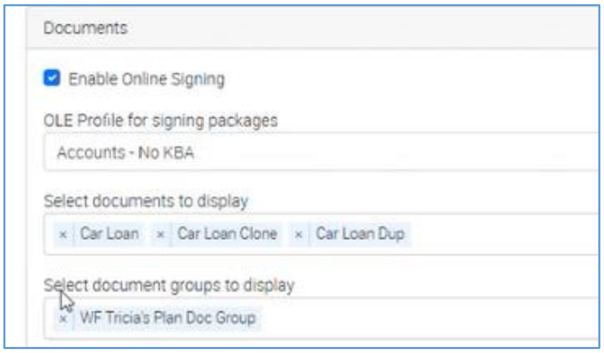


- **Multi-line fields** are now supported and can be up to 10 lines deep, with some additional flexibility to expand the field in order to view the field contents.
    - Specify the number of lines needed, up to 10.

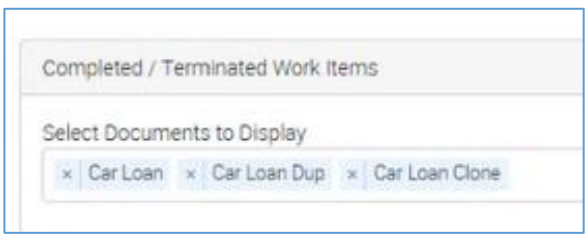




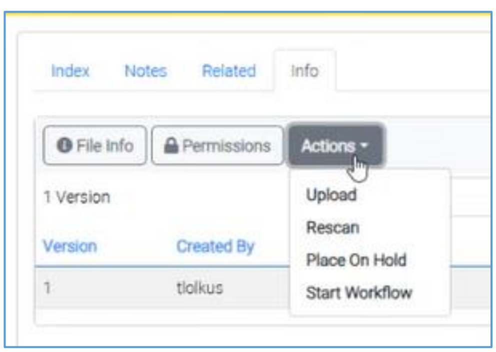
- **Doc Sets** are now configurable when creating Workflow steps, allowing for multiple documents to be added to the step without having to enter each Document Type name.
  - When entering documents to display, individual documents can be listed (standard) as well as document groups.



- **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.



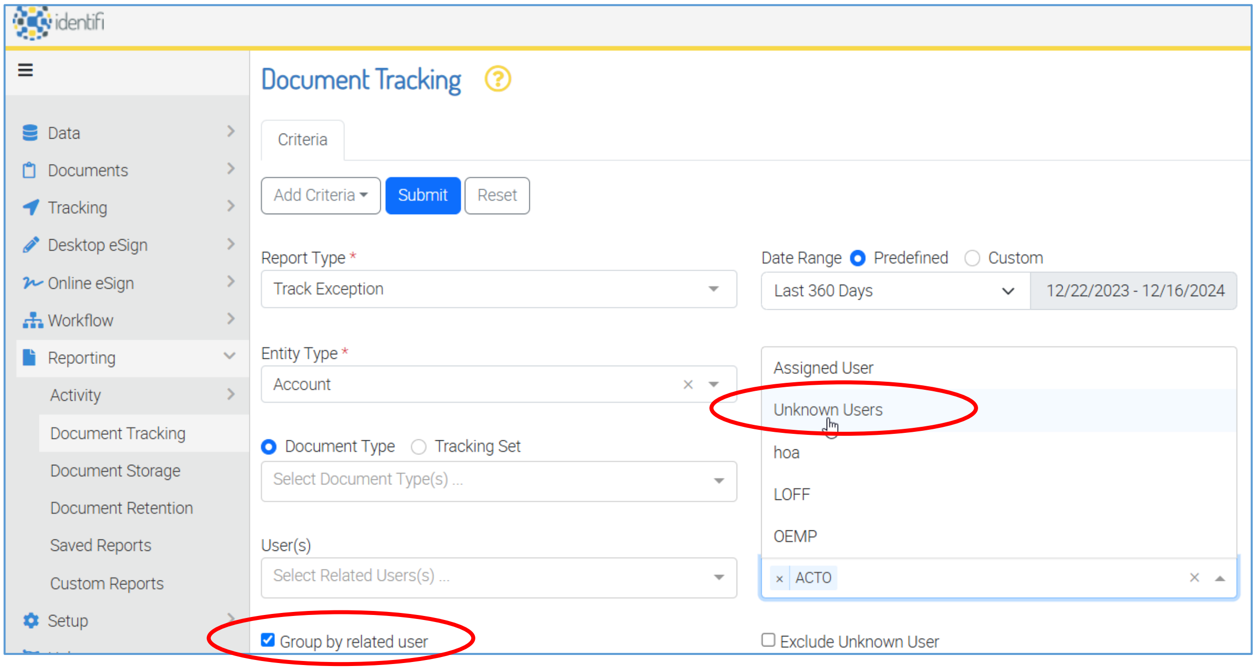
- **Start a Workflow Item** added to Document Detail screen to kick off a Workflow.
  - From the Document Detail Viewer, a Workflow can be started within the "Info" panel.



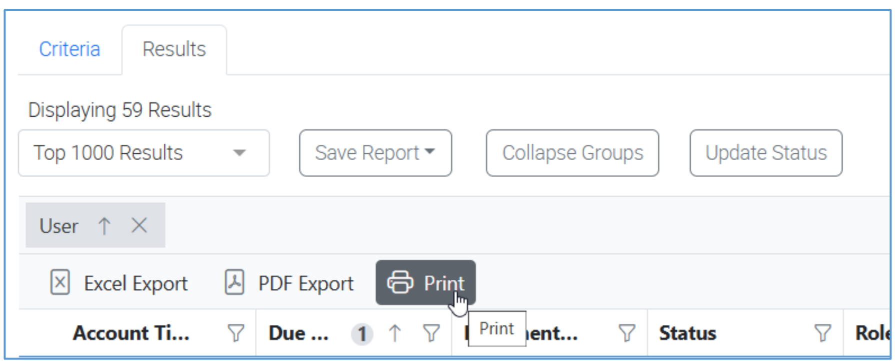
  - Available if the user opening the document has indexing permissions for that Application.
  - The document type must also be configured within the Workflow Plan to start a workflow.

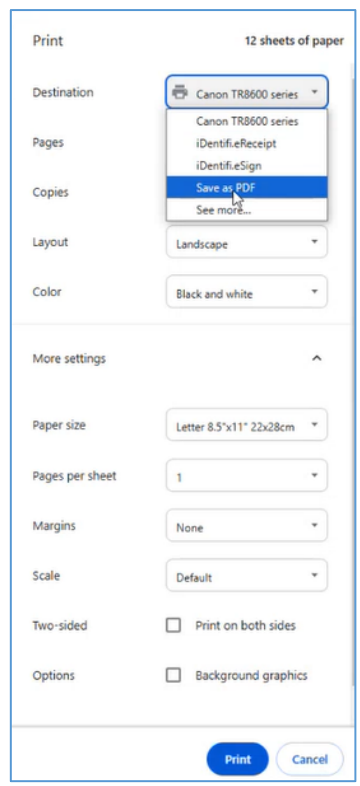
REPORTING

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



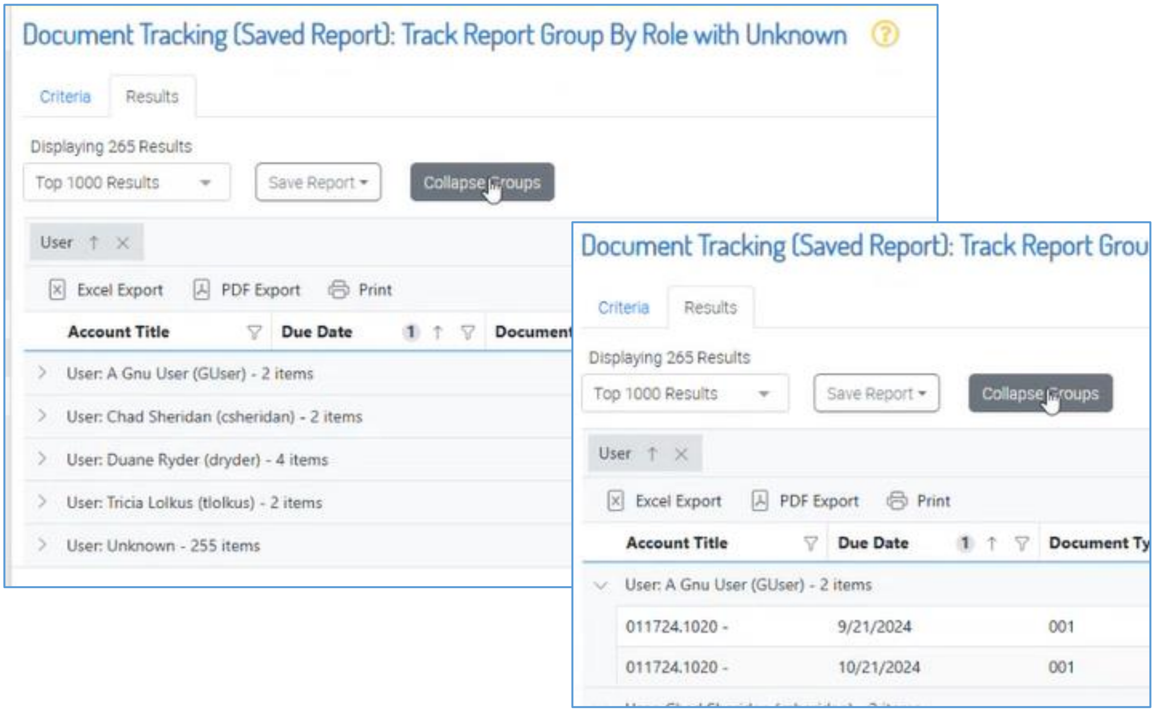
- **Reporting Grid**
    - Print option added in Results



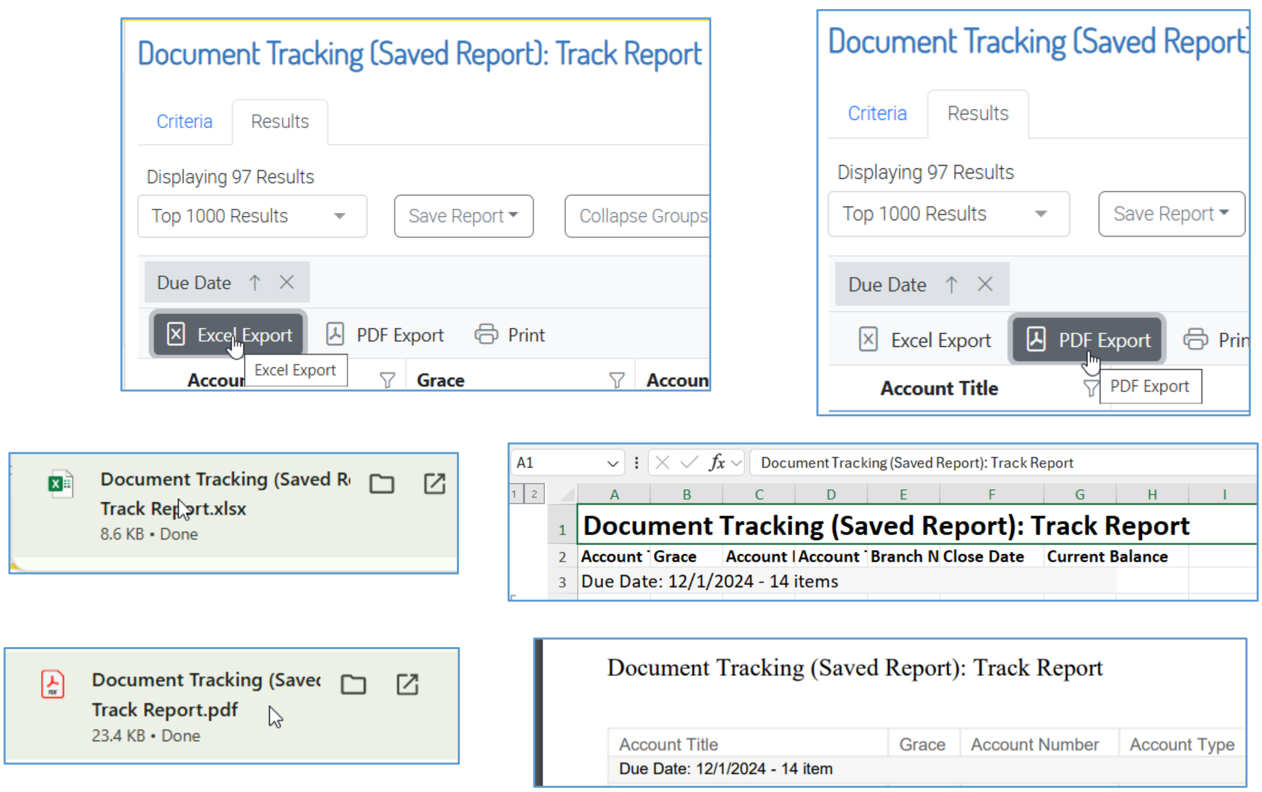


    - Allows the user to configure Print settings and print page to .pdf

    - Collapse option within the grid will collapse and re-expand results.



- 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.



OTHER NOTABLE CHANGES

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