

iCS Enhancements August 2014

A recording of the webinar presented in mid-August 2014 covering these iCS enhancements will be available on the iCS Resource Page <http://www.obfs.uillinois.edu/ics-resources>

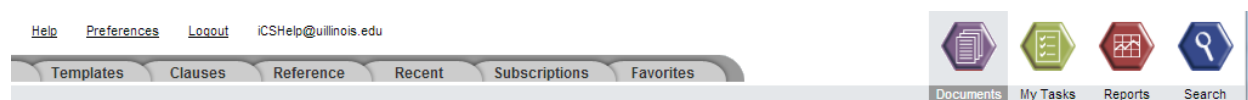
1) Quick Search is Case Insensitive Setting Added

Quick Search is no longer case sensitive.

Note: Does not change case sensitivity for Advanced Search.

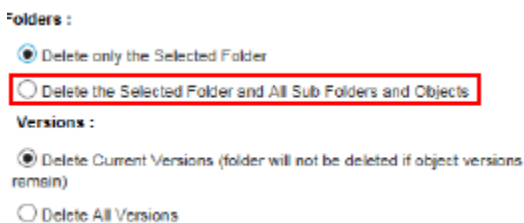
2) Help Desk Information Setting Added

The iCS Help email address is displayed at the top of the screen.



3) “Delete All Subfolders and Items” Option Removed When Deleting Folders

The possibility of accidentally deleting any subfolder and the documents they contain is now eliminated. Only deleting the selected folder itself is possible.



Each subfolder must now be deleted individually. Deleting a subfolder also automatically deletes all of its contents.

4) Internet Explorer 10 Fully Displays without Scrollbars

When using the IE10 browser, the window exactly fits the monitor size, enabling access to the lower right corner buttons without scrolling. Vertical and horizontal scroll bars are not needed and do not display.

5) Assign Related fixes

Another fix ensures that when the Assign Related function is selected, the related document will appear in the Related Documents area of the Dashboard.

6) Minor Changes in Content of Checklist Notification Emails

From: Jennifer Erickson [mailto:jerickso@uillinois.edu]
Sent: Wednesday, July 30, 2014 4:18 PM
To: Richmond, Hanna
Subject: Checklist Item Assigned - Contract - Unit Name - Contracting Party Name (CN-00001250 v 1.0)
A Prodagio Checklist Task was assigned to Hanna Richmond
Document Name: Contract - Unit Name - Contracting Party Name (CN-00001250 v 1.0)
Assigned Date: July 30, 2014
Task Description:
Dean or Director approval of the contract. Required for all contracts \$25,000 and above at UIS. Required for all contracts \$50,000 and above at UIC and UIUC.
[View Task in Prodagio](#)
Jacket Properties:
No Jacket Properties configured for Contract type.

- The Document Name is now included in the body of the email.
- The Task Name no longer appears in the email (formerly populated as “Task Description”).
- “Task Description” is now the detailed description from the checklist task.
- “Description” is removed.

7) Automatic Checkout of Emailed Attached Documents Added

Checkbox for “Checkout Document After Send” appears in the bottom of the Email as Attachment window. If user checks the box, then the contract is automatically checked out when the email is sent.

Email as Attachment : Object

To:

Cc:

Subject: Multiple Documents

Attachments: MOU Form (T-00020 v1.0) (T-00003 v1.0) (CN-00060 v1.0)
MOU Form (T-00020 v1.0) (T-00003 v1.0) Feb 15, 2012 (docuadmin)
Roles Compared Jan 27, 2011 (docuadmin

Message Text:

Checkout Document After Send:

Send Cancel


8) Change Reminder Notification Date from User My Tasks Window

Allows users to change the Notification date in any of their Open status Reminders displayed on their My Tasks View.

Task Manager: Reminder :




Reminder

Details

 Reminder - Review for Renewal - Tim Sample Global Contact list ()
Sent Date : 09/09/2011 Action : Review for Renewal
Sender : docuadmin Notification Date : 07/19/2011

Requirements : Instructions :
none Please review before expiration date.

Included By Sender


Document Name	Modified		
 Tim Sample Global Contact list (CN-00069 v1.0)	8/11/2011 2:11 PM	 	View Add Note Remove

To Complete This Reminder:

Enter Comments below, then click the Complete button. This will complete the Reminder.

To Change Notification Date:

Enter the new notification date, then click the Complete button. This will complete this task and update the reminder notification date.

Date  Add to Calendar

9) Change Obligation Due Date from User My Tasks Window

Allows users to change the due date in any of their Open status Obligations displayed on their My Tasks View.

Obligation





Details

 Obligation - Master Services Agreement (CN-00011 v1.5)

Sent Date : 09/08/2011	Category : Review Meeting
Sender : docuadmin	Subcategory : Type A
Due Date : 09/08/2011	Location : Main Office
Quantity : 0	Responsibility : External
Measure : Copies	Amount : 0
Comments :	Currency : Dollars (Canadian)

Requirements : Instructions :

Included By Sender

Document Name	Modified	
 Master Services Agreement (CN-00011 v1.5)	8/11/2011 4:12 PM	   View Add Note Remove

To Complete This Obligation:


Enter your Password and Comments below, then click the Complete button. This will complete the Obligation.

Password :

Comments :

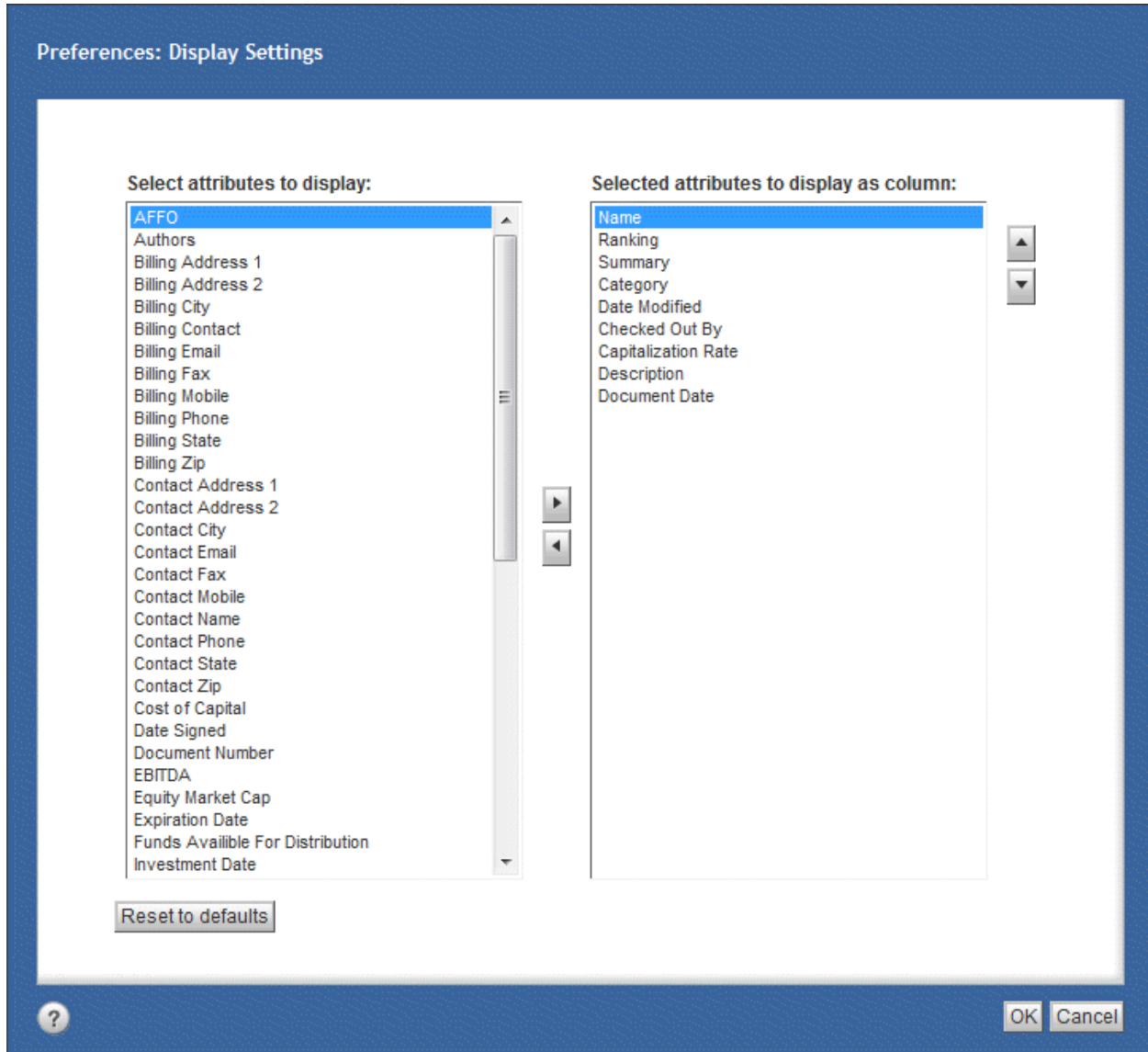
To Change Due Date:

Enter the new due date, then click the Complete button. This will complete this task and update the obligation due date.

Date  Add to Calendar

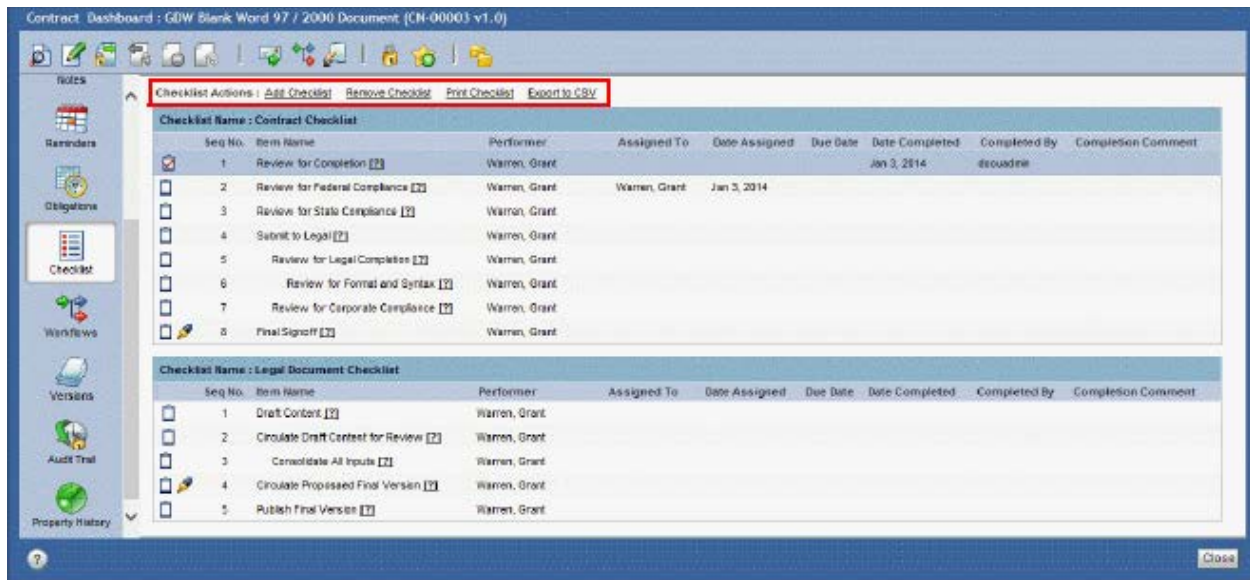
10) All Properties of Selected Document Type Available in Search

In Search Results, all fields for the selected document type are available to select as displayed Search Result columns using the Column Preferences icon. Additionally, all of the document type fields are available for export with the right-click Export to CSV.



11) Checklist User Functionality Enhanced

- Checklist Window Enhancements:
 - Any number of different checklists may be added to any document of any type, with all added Checklists displayed in the Checklist window. Each Checklist may be added only once.



- Add Checklist replaces Select Checklist. This link terminology allows adding one or more Checklists to a document. Also replaces Refresh Checklist.
- Print Checklist is added. This link allows printing all Checklist items in all attached Checklists in a graphical format.
- Export to CSV is added. This allows exporting all Checklist items to a CSV spreadsheet.

	A	B	C	D	E	F	G	H	I
1	Checklist Name	Sequence	Item Name	Date Assigned	Due Date	Assigned To	Date Completed	Completed By	Completion Comment
2	Contract Checklist	1	Review for Completion				1/3/2014 15:21	docuadmin	
3	Contract Checklist	2	Review for Federal Compliance	1/3/2014 15:21		Warren, Grant			
4	Contract Checklist	3	Review for State Compliance						
5	Contract Checklist	4	Submit to Legal						
6	Contract Checklist	5	Review for Legal Completion						
7	Contract Checklist	6	Review for Format and Syntax						
8	Contract Checklist	7	Review for Corporate Compliance						
9	Contract Checklist	8	Final Signoff						
10	Legal Document Checklist	1	Draft Content						
11	Legal Document Checklist	2	Circulate Draft Content for Review						
12	Legal Document Checklist	3	Consolidate All Inputs						
13	Legal Document Checklist	4	Circulate Proposed Final Version						
14	Legal Document Checklist	5	Publish Final Version						

- **Checklist Window Display Enhancements**

- **Checklist Name** table heading, **Seq No**, **Performer**, **Completion Comment** column headings have been added and other columns reordered.

Checklist Name : Contract Checklist									
Seq No.	Item Name	Performer	Assigned To	Date Assigned	Due Date	Date Completed	Completed By	Completion Com	
1	Review for Completion [?]	Warren, Grant				Jan 3, 2014	docuadmin		

- [?] on Completion Comment heading removed
- Priority is removed when assigning a Checklist item.

- **Checklist Window Right-Click Enhancements**

The available selection of Checklist item right-click selections has changed.

- **Unassign Item** action is added to clear an assigned item's assigned user (if the item is not completed).
- **Reassign Item** action is added to assign an item that had been previously assigned, then unassigned.
- **Reset Item** action replaces **Reopen** to clear both the item's assigned user and the recorded completion action for an item (if the item is completed).
- **View Details** action is added to view the uneditable details of the Checklist item.

Checklist Name : Contract Checklist			
Seq No.	Item Name	Performer	
1	Review for Completion [?]	Warren, Grant	
2	Review for Federal Compliance [?]		View Details
3	Review for State Compliance [?]		Reassign Item
4	Submit to Legal [?]		Complete Item
5	Review for Legal Completion [?]		Reject Item
6	Review for Federal Compliance [?]		Unassign Item

Checklist Name : Contract Checklist			
Seq No.	Item Name	Performer	
1	Review for Completion [?]		View Details
2	Review for Federal Compliance [?]		Reset Item

- **Checklist-related Audit Trail Entry Enhancements**

Audit Trail entries are recorded for various Checklist actions, including Add Checklist. Checklist-related Audit Trail Entries include the name of the Checklist.

12) Fixes

- **Select Checklist Menu** – Checklists appear in alphabetical order in Select Checklist / Checklist Name drop-down menu.
- **Jacket Reflects Edited Properties** – When a user selects Edit Properties in the Jacket and makes a change to one or more properties, the Jacket refreshes to show that change instantly. It is no longer necessary to close and open the Dashboard in order to see the change reflected in the Jacket.
- **Notes Icon Appears in Task Notification** – The Notes icon appears in the Task Notification window.

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