SOURCEHOV

Results that Exceed Expectations

document DNA

Increasing Productivity with Digital Network Access

# System Administration Manual

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# Document History

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# Revision History

| Date | Revision | Summary of change(s) | Reviewer |
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# Table of Contents

# 1. Overview

The documentDNA™ Security Administration Module is a tool for managing user access to your company's documents stored in documentDNA™.

The methodology for providing security is designed around various organizational structures and can be combined with document type and index value limitations to afford exceptional control on both broad granular levels. This allows for a series of discrete departments to generate and manage their own documents while at the same time maintaining corporate administration rights to allow access to information across departments. Additionally, it accommodates the need for individual departments to use desperate security settings and work with different arrays of document types.

documentDNA™ security provides the following levels of protection:

- Corporate - Access across more than one Department
- Departmental - Access to a single Department's documents
- Document Type - Information access can be further limited to selected document types
- Document Level - Access can be restricted to specific index key values within a document type and/or application.

This manual explains the documentDNA™ Security Administration hierarchy and the website module used by administrators to manage information security. The website allows administrators to perform the following core functions:

- Create various levels of users
- Manage users' access to information
- Generate user activity reports
- Generate application specific reports

The illustrations used in this manual are approximations of actual production screens, menus and documents. Simulations were necessary to comply with varous security regulations.

## 1.1. Prerequisites

- IE Versions – most compatible
- Broadband Internet Connection
- Standard U.S. English Key board

## 1.2. Typographic Convention and Icon Keys

| TYPOGRAPHIC CONVENTION |
|---|
| **Bold - Bold** text is used for selectable sub topics, window buttons, screen names and flashed messages. |
| *MonospaceItalic - MonospaceItalic* text is used for path names and file names. |

| ICON KEY | |
|---|---|
| ☎ | Phone |
| ✉ | Mail |
| 📂 | Notes |
| ✍ | Tips |
| △ | Warning |
| ↔ | URL and Path |

## 1.3. Contact and Support

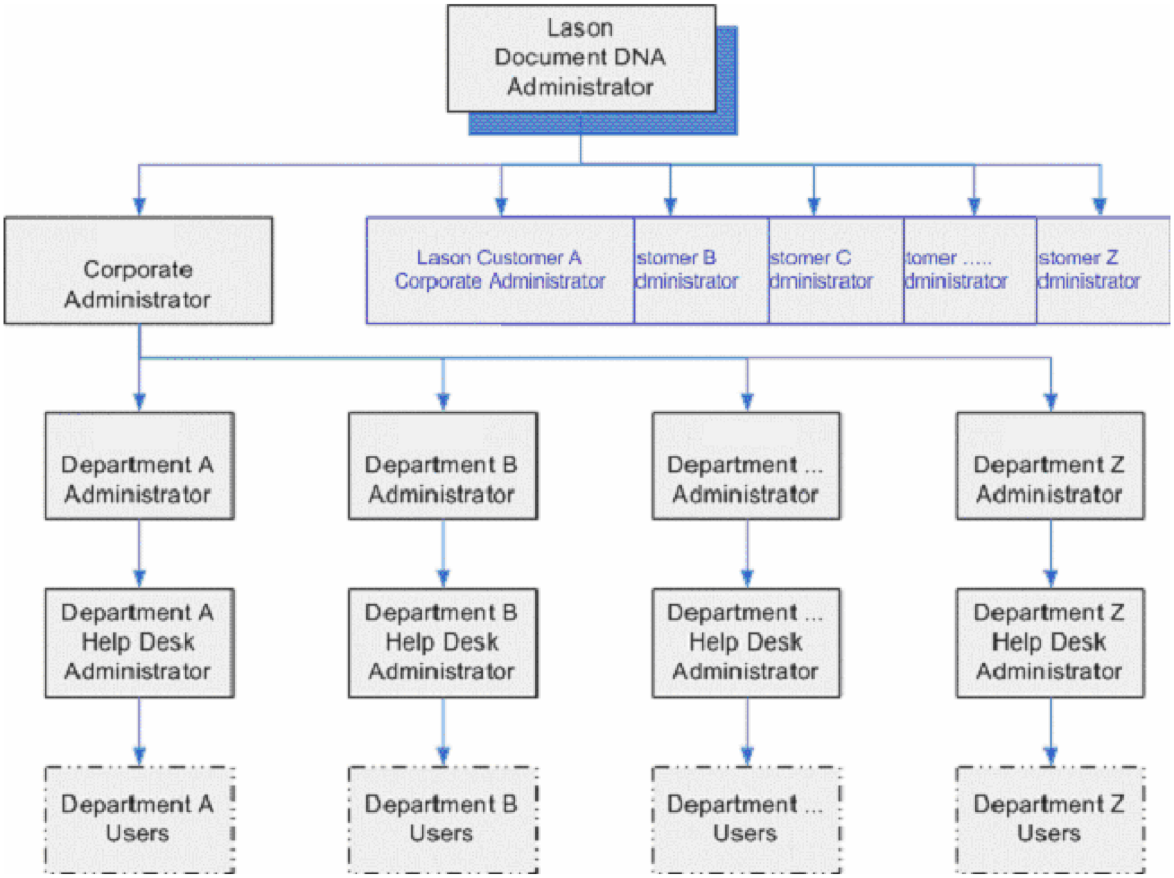
| | |
|---|---|
| **Address** | **SourceHOV, LLC**<br>3232 McKinney Avenue<br>Suite 1000<br>Dallas, Texas 75204<br>(888) 339-4462 |
| **Compliance (Consumer Disputes)** | ☎ : Toll Free 1.800.497.9527<br>✉ : info@hovservices.com |
| **Corporate Website** | ↔ : http://www.sourcehov.com |

## 2. Security Administration Structure

documentDNA™ security will be managed by a hierarchy of application administrators. Each tier in the hierarchy has its own scope of capabilities. Each customer has the option to choose which levels to utilize, as needed.

As illustrated in the below image, the document DNA™ security administration hierarchy consists of 4 levels:

- Lason documentDNA™ Administrator
- Corporate Administrator
- Departmental Administrator
- Help Desk Administrator


Lason Document DNA Administrator
Corporate Administrator
Lason Customer A Corporate Administrator
stomer B dministrator
stomer C dministrator
tomer ..... dministrator
stomer Z dministrator
Department A Administrator
Department B Administrator
Department ... Administrator
Department Z Administrator
Department A Help Desk Administrator
Department B Help Desk Administrator
Department ... Help Desk Administrator
Department Z Help Desk Administrator
Department A Users
Department B Users
Department ... Users
Department Z Users

The topmost level is staffed by the Lason personnel while all the other levels are staffed exclusively by the customer personnel.

The Corporate Administrator has jurisdiction over the entire organization with superuser rights over all Departments, Administrators, users and documents.

However, in many circumstances, even corporate administrators will not have unfettered access to actual documents. Although an administrator is designated Corporate, they may not, for example, be permitted to see “Confidential” or “Medical” documents.

The Departmental Administrator’s privileges are restricted to his/her designated Department. One Department’s Administrators have no jurisdiction over any other Departments

The Help Desk Administrator is a sub-level within a Department. This level is limited to changing or resetting user passwords and is primarily geared towards first level support personnel.

# 3. Organization of Security Module Website

The structure of the document DNA™ website is configured to meet the organizational needs of each individual customer.

There is a single website for all Departments that have documents in documentDNA™. All the Department applications are listed on the home page.

# 4. Access Rights to Security Administration Module

There are 8 core security management tasks that can be performed in the Security Administration Module. The **Corporate Administrator(s)** can perform all tasks across all Departments. The **Department Administrator(s)** can perform all but the first task for their designated Departments only; they have no access to Departments other than their own. The **Help Desk Administrator** is a Departmental position and is also confined to a designated Department.

The below table illustrates the functions of the Corporate Administrator and the Department Administrator.

| Function | Corporate Administrator | Department Administrator |
|---|---|---|
| Add/Remove Corporate Admins | 🕘 | |
| Add/Remove Department Admins | 🕘 | 🕘 |
| Add/Remove Help Desk Admins | 🕘 | 🕘 |
| Document Level Security (DLS) Group Management | 🕘 | 🕘 |
| Add/Remove Users | 🕘 | 🕘 |
| Generate User Reports | 🕘 | 🕘 |
| Generate User Activity Reports | 🕘 | 🕘 |
| Change/Unlock User Passwords | 🕘 | 🕘 |

## 4.1. Accessing Security Administration Module

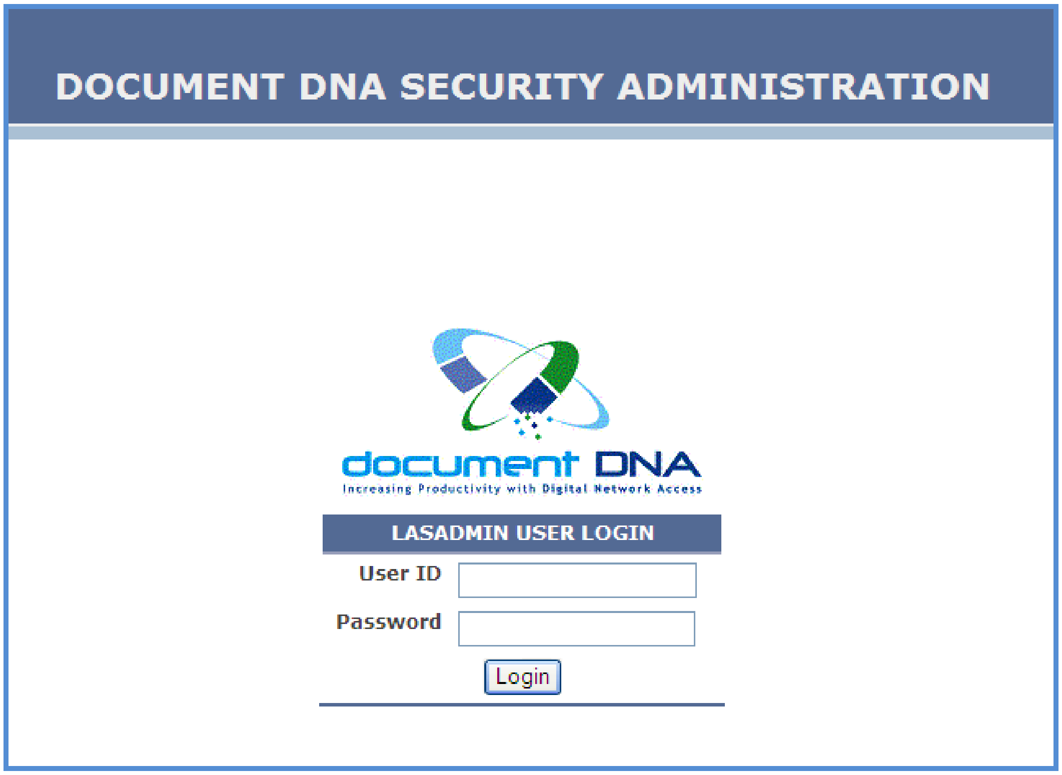
The procedure for accessing the Security Administration Module is the same for all levels of Administrators. It is only after a successful login that the differences in access rights and privileges become evident. Each level of Administration is provided with a corresponding set of tools for performing the tasks assigned to that level.

### 4.1.1. To access the module

**Step 1:** Connect to the production URL below:

http://admin.documentdna.com/dnademosecurity/login.asp?customerid=LASADMIN

The following Login window appears.

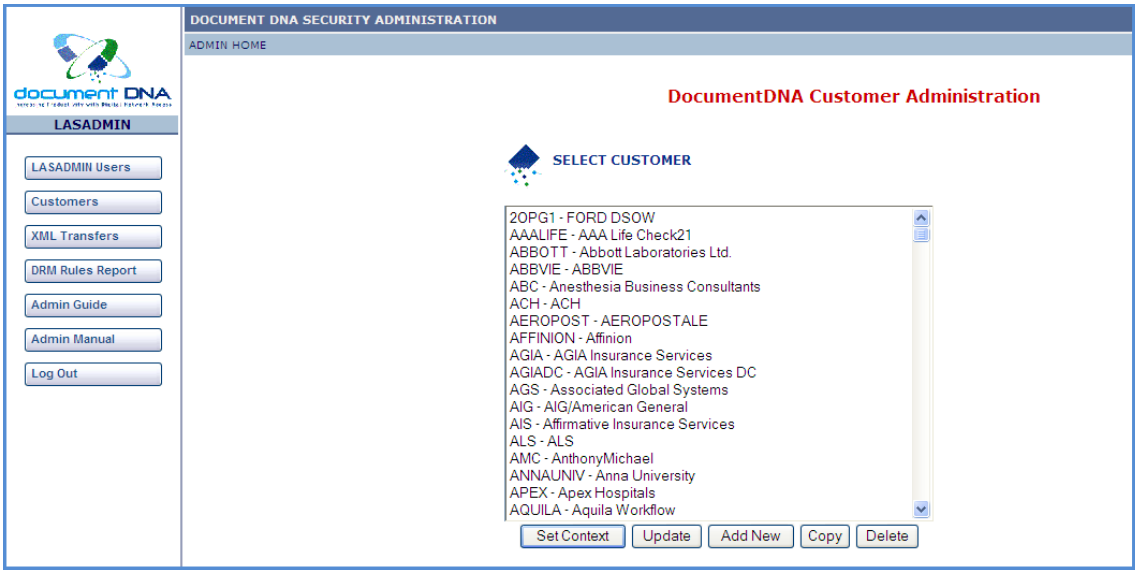

DOCUMENT DNA SECURITY ADMINISTRATION
document DNA
Increasing Productivity with Digital Network Access
LASADMIN USER LOGIN
User ID
Password
Login

**Step 2:** Enter the **User ID**.

**Step 3:** Enter the **Password**.

**Step 4:** Click on the **Login** button.

The user will find the home page as shown in the below image.



DocumentDNA Customer Administration

SELECT CUSTOMER

2OPG1 - FORD DSOW
AAALIFE - AAA Life Check21
ABBOTT - Abbott Laboratories Ltd.
ABBVIE - ABBVIE
ABC - Anesthesia Business Consultants
ACH - ACH
AEROPOST - AEROPOSTALE
AFFINION - Affinion
AGIA - AGIA Insurance Services
AGIADC - AGIA Insurance Services DC
AGS - Associated Global Systems
AIG - AIG/American General
AIS - Affirmative Insurance Services
ALS - ALS
AMC - AnthonyMichael
ANNAUNIV - Anna University
APEX - Apex Hospitals
AQUILA - Aquila Workflow

There are four Administrative functionalities that appear on the left pane of the home page. They are the LASADMIN Users, Customers, XML Transfers and the DRM Rules Report.

To return to the Administration Home Page, you can click the **ADMIN HOME** link on the upper left of any screen.

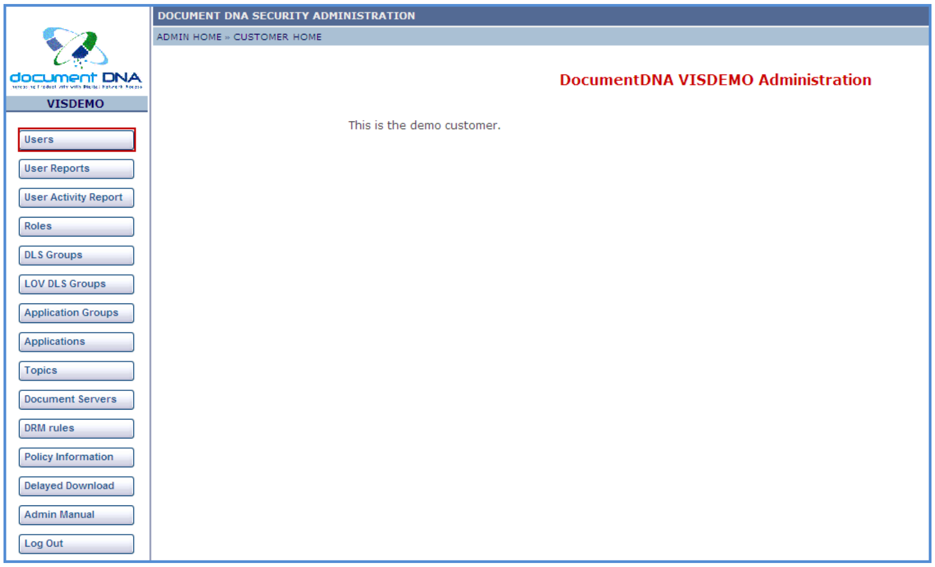
To exit documentDNA™ Security Administration, you can click on the **Log Out** button on the left pane of any screen.

🗁 **Note:** The Corporate and Department Level Administrator home pages have the same appearance but the submenu differs.

🗁 **Note:** The Department Help Desk Administrator home page is limited to a single option for resetting the Departmental user passwords.

## 4.2. Users

1. Click on the **Users** button.



DOCUMENT DNA SECURITY ADMINISTRATION

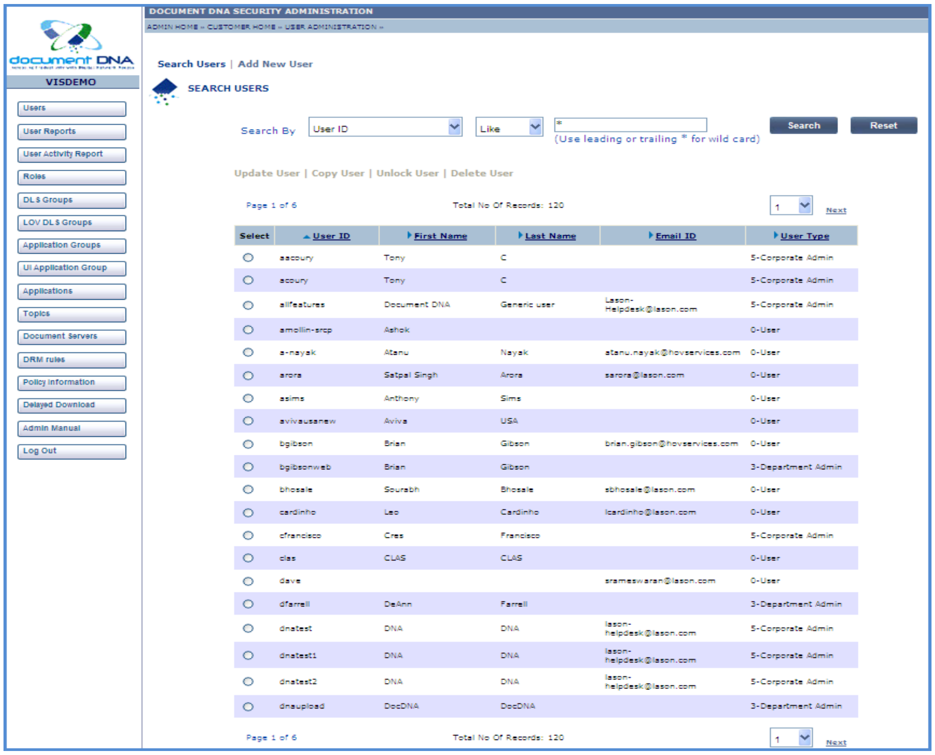
ADMIN HOME » CUSTOMER HOME

DocumentDNA VISDEMO Administration

This is the demo customer.

2. The User’s page consists of two options namely – **Search Users** and **Add New User**.

**Note:** The **Search Users** page is the default page.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | Add New User

SEARCH USERS

Search By: User ID | Like | * (Use leading or trailing * for wild card)

Update User | Copy User | Unlock User | Delete User

Page 1 of 6 Total No Of Records: 120 1

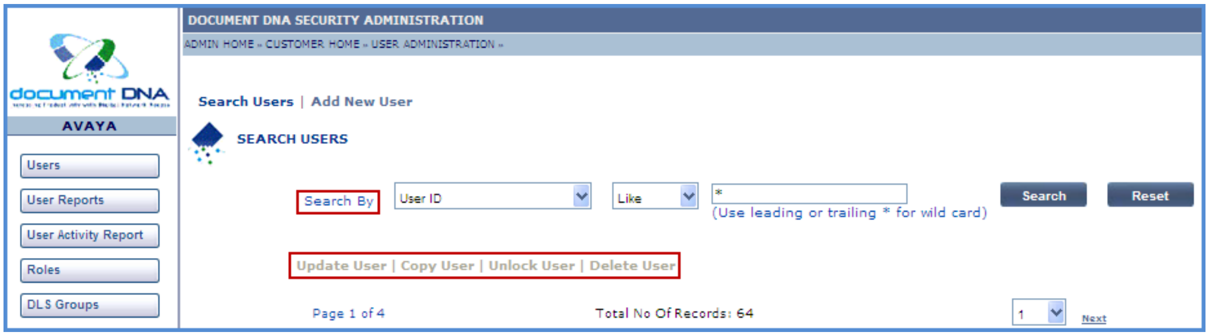
| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ○ | aacoury | Tony | C | | 5-Corporate Admin |
| ○ | acoury | Tony | C | | 5-Corporate Admin |
| ○ | allfeatures | Document DNA | Generic user | Lason-Helpdesk@lason.com | 5-Corporate Admin |
| ○ | amollin-srcp | Ashok | | | 0-User |
| ○ | a-nayak | Atanu | Nayak | atanu.nayak@hovservices.com | 0-User |
| ○ | arora | Satpal Singh | Arora | sarora@lason.com | 0-User |
| ○ | asims | Anthony | Sims | | 0-User |
| ○ | avivausanew | Aviva | USA | | 0-User |
| ○ | bgibson | Brian | Gibson | brian.gibson@hovservices.com | 0-User |
| ○ | bgibsonweb | Brian | Gibson | | 3-Department Admin |
| ○ | bhosale | Sourabh | Bhosale | sbhosale@lason.com | 0-User |
| ○ | cardinho | Leo | Cardinho | lcardinho@lason.com | 0-User |
| ○ | cfrancisco | Cres | Francisco | | 5-Corporate Admin |
| ○ | clas | CLAS | CLAS | | 0-User |
| ○ | dave | | | srameswaran@lason.com | 0-User |
| ○ | dfarrell | DeAnn | Farrell | | 3-Department Admin |
| ○ | dnatest | DNA | DNA | lason-helpdesk@lason.com | 5-Corporate Admin |
| ○ | dnatest1 | DNA | DNA | lason-helpdesk@lason.com | 5-Corporate Admin |
| ○ | dnatest2 | DNA | DNA | lason-helpdesk@lason.com | 5-Corporate Admin |
| ○ | dnaupload | DocDNA | DocDNA | | 3-Department Admin |

Page 1 of 6 Total No Of Records: 120 1

### 4.2.1. Search User

The Search User page enables the user to search for an user by his User ID, First Name, Last Name, Email ID and User Type from the **Search By** option. The Parameter values are '**Like**' and '**Is**'. Using this information, the user can perform the following actions:

- **Update User** - View and/or modify a user profile and reset passwords
- **Copy User** - Create a new user by copying an existing profile
- **Unlock User** - Remove the password lock that occurs once a user fails to login on three consecutive attempts.
- **Delete User** – Remove a user



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

SEARCH USERS

Search By: User ID | Like | *

(Use leading or trailing * for wild card)

Page 1 of 4

Total No Of Records: 64

### Update User

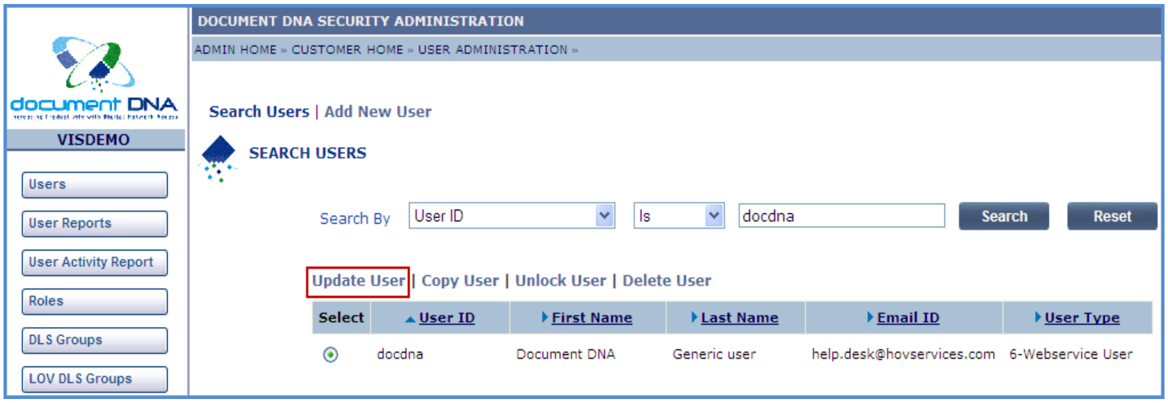
Use the **Update User** function to view a profile or to modify a user profile.

To modify a profile, change the field values by keying in the new ones or by selecting new values from the drop-down lists wherever provided.

The following step-by-step procedure explains the same.

1. Select the appropriate value from the **Search By** field and its respective parameter value.
2. Click on the **Search** button.
3. The user's information such as the **User ID**, **First Name**, **Last Name**, **Email ID**, **User Type** appears.

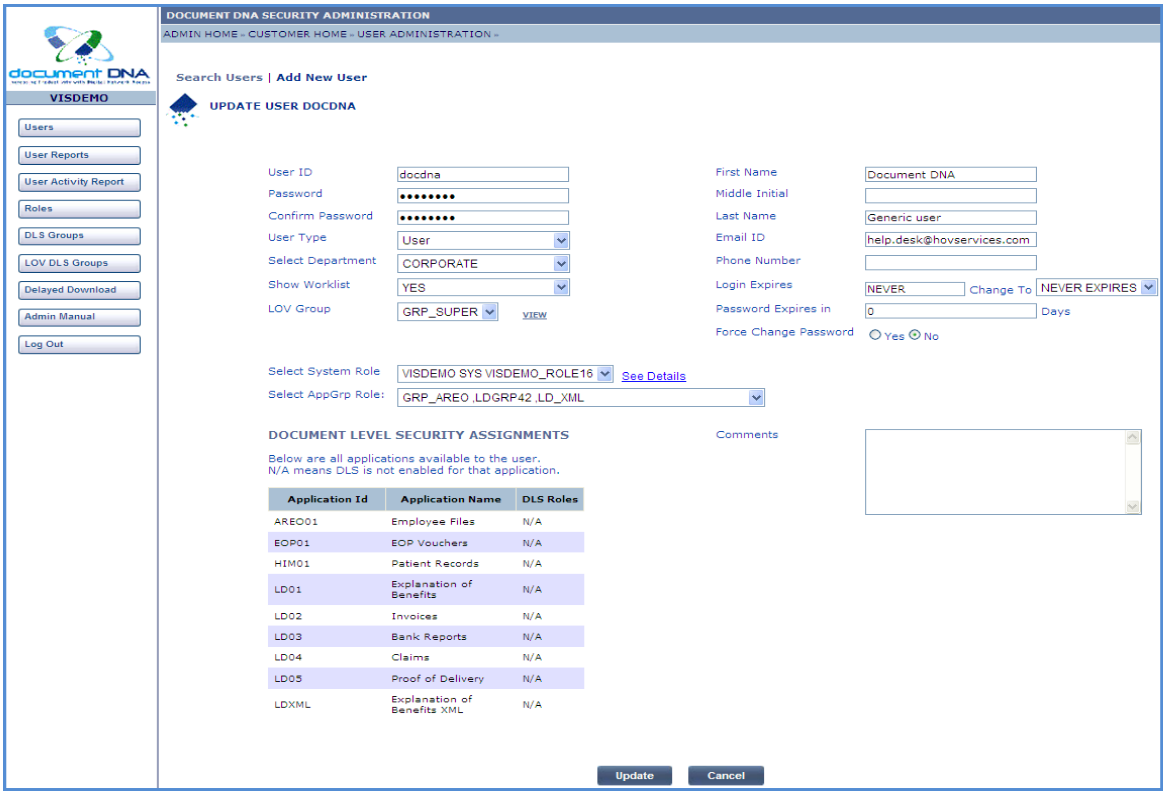
4. The user should select the **User ID** row which is to be updated and click on the **Update User** link to update the information.
5. Click on the **Reset** button to clear the search values.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
document DNA
VISDEMO
Users
User Reports
User Activity Report
Roles
DLS Groups
LOV DLS Groups
Search Users | Add New User
SEARCH USERS
Search
Reset
Update User | Copy User | Unlock User | Delete User

Search By: User ID | Is | docdna

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ● | docdna | Document DNA | Generic user | help.desk@hovservices.com | 6-Webservice User |

6. The following screen appears with the all the fields namely the **User ID**, **Password**, **Confirm Password**, **First Name**, **Last Name** and so on which will be auto populated. The field Middle Initial is optional.



User ID: docdna
Password: ••••••••
Confirm Password: ••••••••
User Type: User
Select Department: CORPORATE
Show Worklist: YES
LOV Group: GRP_SUPER

First Name: Document DNA
Middle Initial:
Last Name: Generic user
Email ID: help.desk@hovservices.com
Phone Number:
Login Expires: NEVER Change To NEVER EXPIRES
Password Expires in: 0 Days
Force Change Password: ○ Yes ● No

Select System Role: VISDEMO SYS VISDEMO_ROLE16
Select AppGrp Role: GRP_AREO ,LDGRP42 ,LD_XML

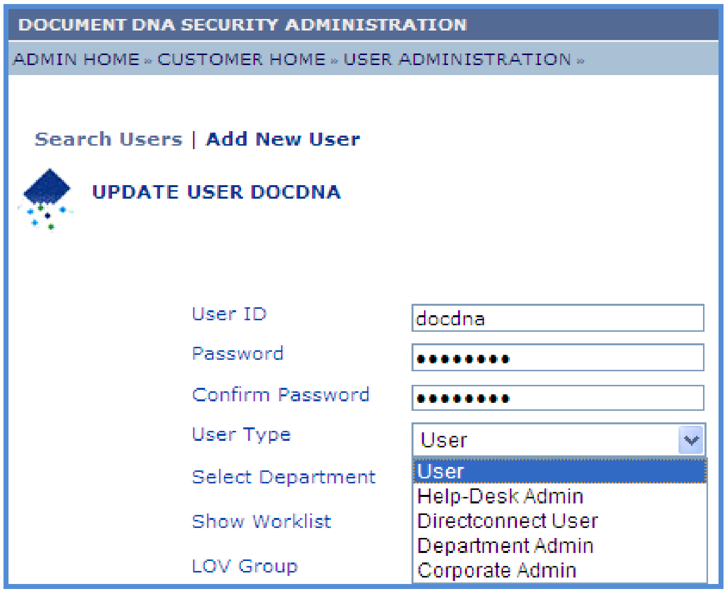
DOCUMENT LEVEL SECURITY ASSIGNMENTS

Below are all applications available to the user.
N/A means DLS is not enabled for that application.

| Application Id | Application Name | DLS Roles |
|---|---|---|
| AREO01 | Employee Files | N/A |
| EOP01 | EOP Vouchers | N/A |
| HIM01 | Patient Records | N/A |
| LD01 | Explanation of Benefits | N/A |
| LD02 | Invoices | N/A |
| LD03 | Bank Reports | N/A |
| LD04 | Claims | N/A |
| LD05 | Proof of Delivery | N/A |
| LDXML | Explanation of Benefits XML | N/A |

Comments:

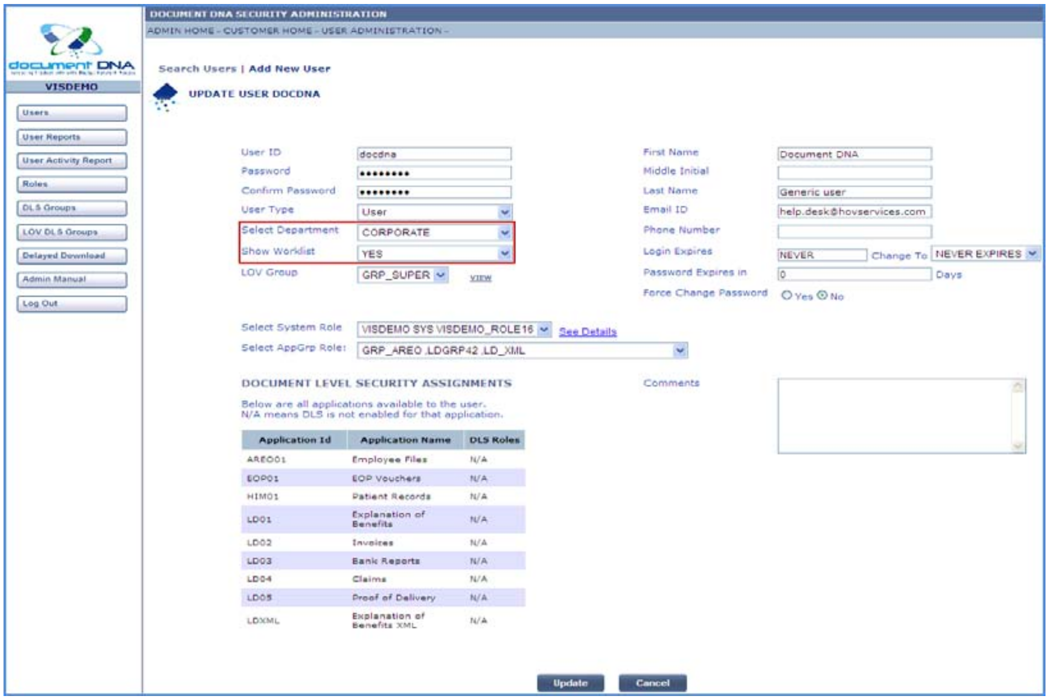
7. The value for the **User Type** field will be auto populated for the selected **User ID**. The User Type values are shown in the below image.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
Search Users | Add New User
UPDATE USER DOCDNA

| | |
|---|---|
| User ID | docdna |
| Password | •••••••• |
| Confirm Password | •••••••• |
| User Type | User |
| Select Department | |
| Show Worklist | |
| LOV Group | |

User<br>
Help-Desk Admin<br>
Directconnect User<br>
Department Admin<br>
Corporate Admin

8. The **Select Department** field has a value named **CORPORATE** and the **Show Worklist** field holds two values – Yes or No.



| | | | |
|---|---|---|---|
| User ID | docdna | First Name | Document DNA |
| Password | •••••••• | Middle Initial | |
| Confirm Password | •••••••• | Last Name | Generic user |
| User Type | User | Email ID | help.desk@hovservices.com |
| Select Department | CORPORATE | Phone Number | |
| Show Worklist | YES | Login Expires | NEVER Change To NEVER EXPIRES |
| LOV Group | GRP_SUPER | Password Expires in | 0 Days |
| | | Force Change Password | ○ Yes ● No |

Select System Role: VISDEMO SYS VISDEMO_ROLE16

Select AppGrp Role: GRP_AREO ,LDGRP42 ,LD_XML

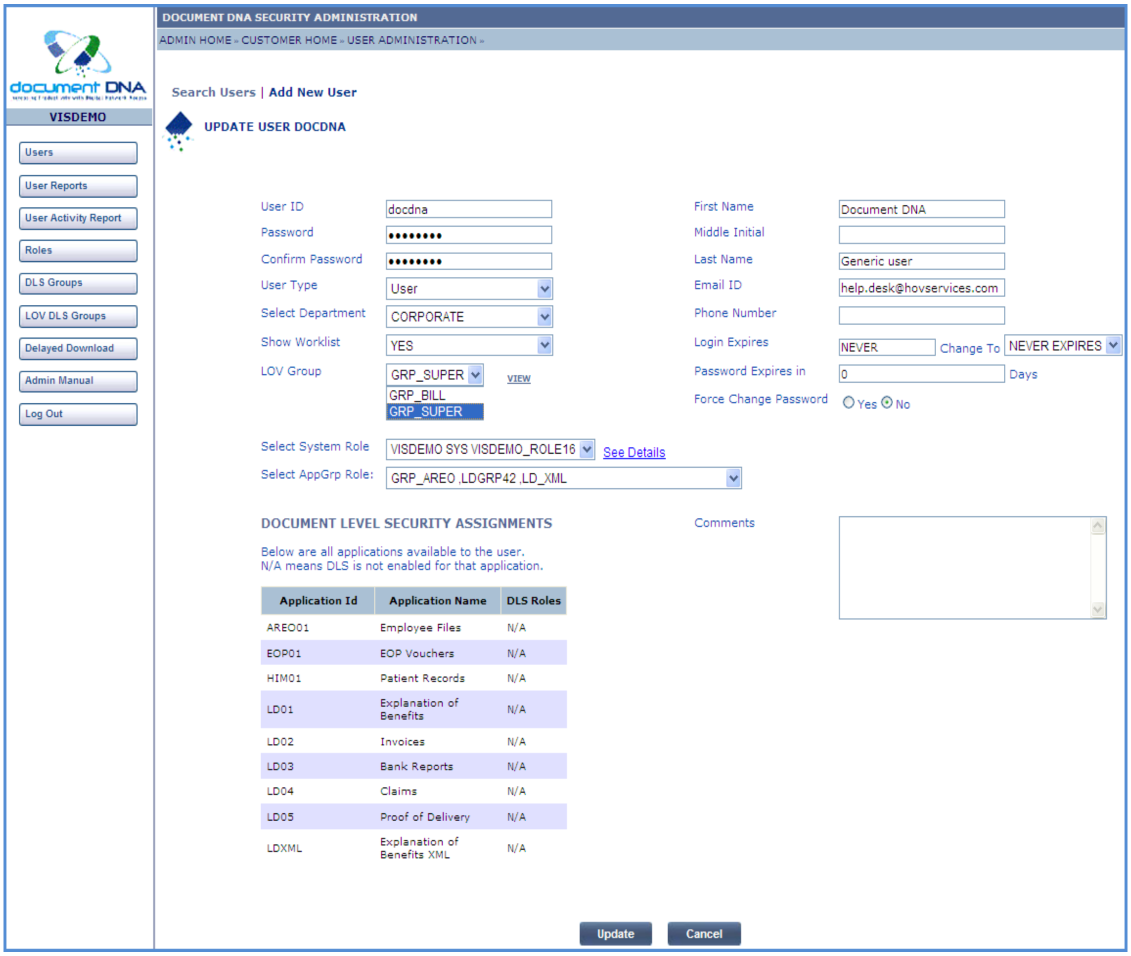
DOCUMENT LEVEL SECURITY ASSIGNMENTS

Comments

Below are all applications available to the user.
N/A means DLS is not enabled for that application.

| Application Id | Application Name | DLS Roles |
|---|---|---|
| AREO01 | Employee Files | N/A |
| EOP01 | EOP Vouchers | N/A |
| HIM01 | Patient Records | N/A |
| LD01 | Explanation of Benefits | N/A |
| LD02 | Invoices | N/A |
| LD03 | Bank Reports | N/A |
| LD04 | Claims | N/A |
| LD05 | Proof of Delivery | N/A |
| LDXML | Explanation of Benefits XML | N/A |

9. List of Values (**LOV**) security is used to limit a user's access to one or more document types within a given application group. This selection will, most likely, be determined by the new user's job role or function within the department. The value of **LOV Group** appears in a drop-down list. By default, the value will appear for the selected **User ID**.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | Add New User

UPDATE USER DOCDNA

| | | | |
|---|---|---|---|
| User ID | docdna | First Name | Document DNA |
| Password | •••••••• | Middle Initial | |
| Confirm Password | •••••••• | Last Name | Generic user |
| User Type | User | Email ID | help.desk@hovservices.com |
| Select Department | CORPORATE | Phone Number | |
| Show Worklist | YES | Login Expires | NEVER Change To NEVER EXPIRES |
| LOV Group | GRP_SUPER VIEW<br>GRP_BILL<br>GRP_SUPER | Password Expires in | 0 Days |
| | | Force Change Password | ○ Yes ● No |

Select System Role: VISDEMO SYS VISDEMO_ROLE16 See Details

Select AppGrp Role: GRP_AREO ,LDGRP42 ,LD_XML

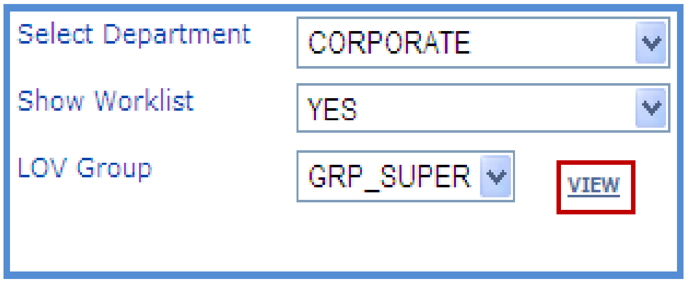
DOCUMENT LEVEL SECURITY ASSIGNMENTS

Below are all applications available to the user.
N/A means DLS is not enabled for that application.

Comments

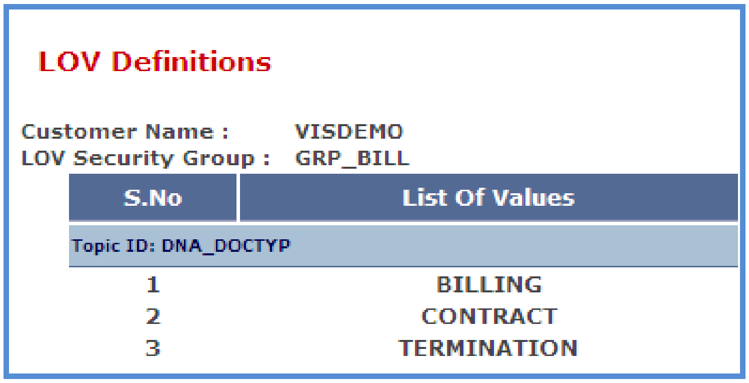
| Application Id | Application Name | DLS Roles |
|---|---|---|
| AREO01 | Employee Files | N/A |
| EOP01 | EOP Vouchers | N/A |
| HIM01 | Patient Records | N/A |
| LD01 | Explanation of Benefits | N/A |
| LD02 | Invoices | N/A |
| LD03 | Bank Reports | N/A |
| LD04 | Claims | N/A |
| LD05 | Proof of Delivery | N/A |
| LDXML | Explanation of Benefits XML | N/A |

10. Click on the **View** link that appears below the **LOV Group**.



| | |
|---|---|
| Select Department | CORPORATE |
| Show Worklist | YES |
| LOV Group | GRP_SUPER VIEW |

The following image appears.

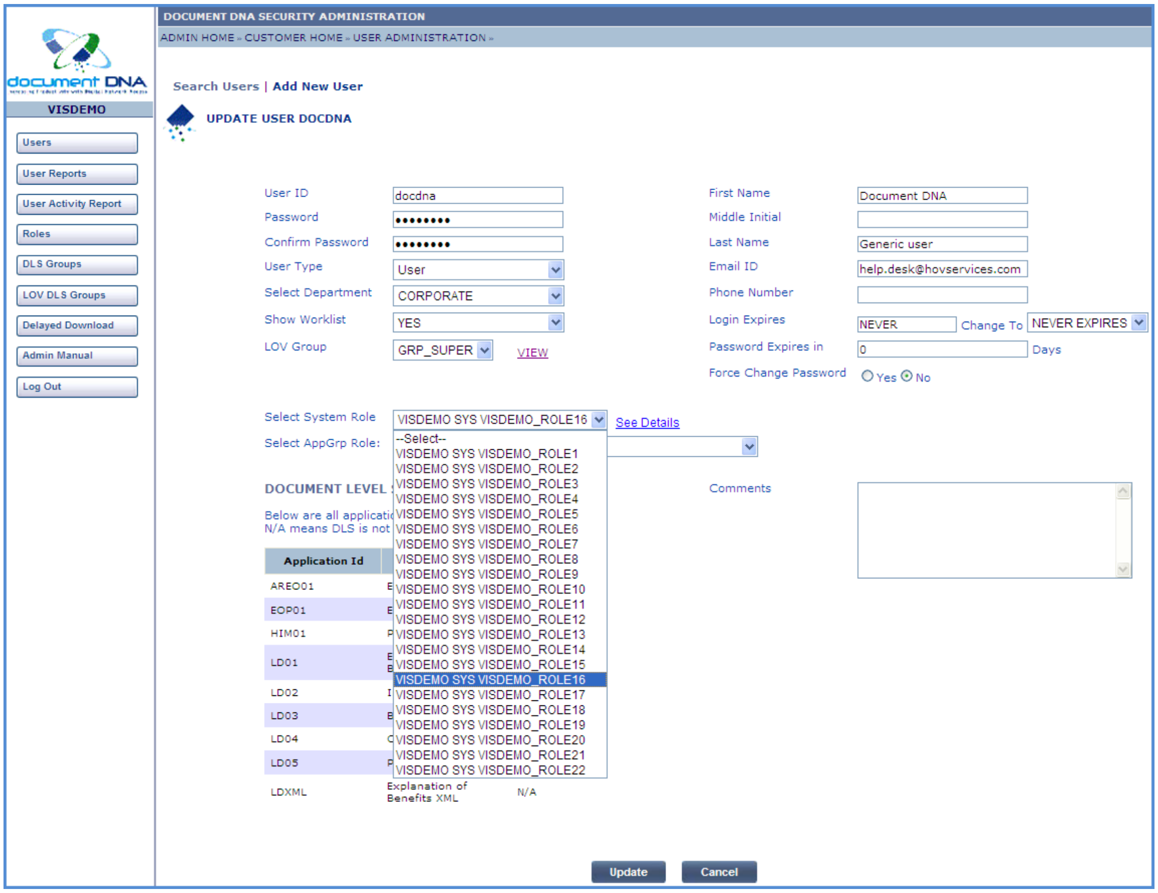


## LOV Definitions

Customer Name : VISDEMO
LOV Security Group : GRP_BILL

| S.No | List Of Values |
|---|---|
| Topic ID: DNA_DOCTYP | |
| 1 | BILLING |
| 2 | CONTRACT |
| 3 | TERMINATION |

11. The **System Role** field contains a drop-down list with many roles.



UPDATE USER DOCDNA

| | | | |
|---|---|---|---|
| User ID | docdna | First Name | Document DNA |
| Password | •••••••• | Middle Initial | |
| Confirm Password | •••••••• | Last Name | Generic user |
| User Type | User | Email ID | help.desk@hovservices.com |
| Select Department | CORPORATE | Phone Number | |
| Show Worklist | YES | Login Expires | NEVER Change To NEVER EXPIRES |
| LOV Group | GRP_SUPER VIEW | Password Expires in | 0 Days |
| | | Force Change Password | ○ Yes ● No |

Select System Role: VISDEMO SYS VISDEMO_ROLE16 See Details

--Select--
VISDEMO SYS VISDEMO_ROLE1
VISDEMO SYS VISDEMO_ROLE2
VISDEMO SYS VISDEMO_ROLE3
VISDEMO SYS VISDEMO_ROLE4
VISDEMO SYS VISDEMO_ROLE5
VISDEMO SYS VISDEMO_ROLE6
VISDEMO SYS VISDEMO_ROLE7
VISDEMO SYS VISDEMO_ROLE8
VISDEMO SYS VISDEMO_ROLE9
VISDEMO SYS VISDEMO_ROLE10
VISDEMO SYS VISDEMO_ROLE11
VISDEMO SYS VISDEMO_ROLE12
VISDEMO SYS VISDEMO_ROLE13
VISDEMO SYS VISDEMO_ROLE14
VISDEMO SYS VISDEMO_ROLE15
VISDEMO SYS VISDEMO_ROLE16
VISDEMO SYS VISDEMO_ROLE17
VISDEMO SYS VISDEMO_ROLE18
VISDEMO SYS VISDEMO_ROLE19
VISDEMO SYS VISDEMO_ROLE20
VISDEMO SYS VISDEMO_ROLE21
VISDEMO SYS VISDEMO_ROLE22

Select AppGrp Role:

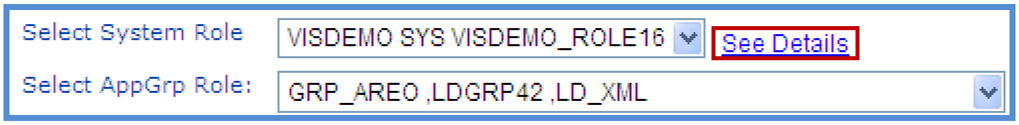
Comments

DOCUMENT LEVEL

Below are all applicati
N/A means DLS is not

| Application Id | | |
|---|---|---|
| AREO01 | E | |
| EOP01 | E | |
| HIM01 | P | |
| LD01 | E<br>B | |
| LD02 | I | |
| LD03 | B | |
| LD04 | C | |
| LD05 | P | |
| LDXML | Explanation of Benefits XML | N/A |

12. The user must perform a mouse over action on the **See Details** link that appears right to the System Role field.

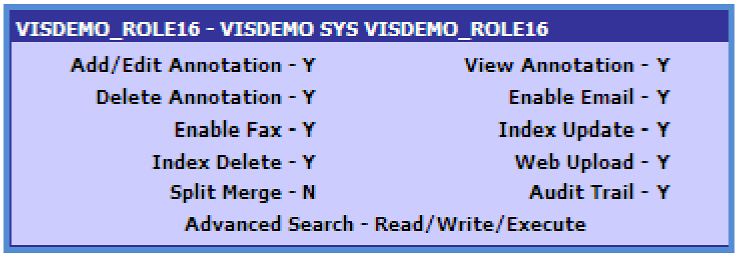


Select System Role: VISDEMO SYS VISDEMO_ROLE16

Select AppGrp Role: GRP_AREO ,LDGRP42 ,LD_XML

The System Role explains the role that the user can perform. Using this information, the user can perform the following actions either Y or N.

Refer to the below image.



VISDEMO_ROLE16 - VISDEMO SYS VISDEMO_ROLE16

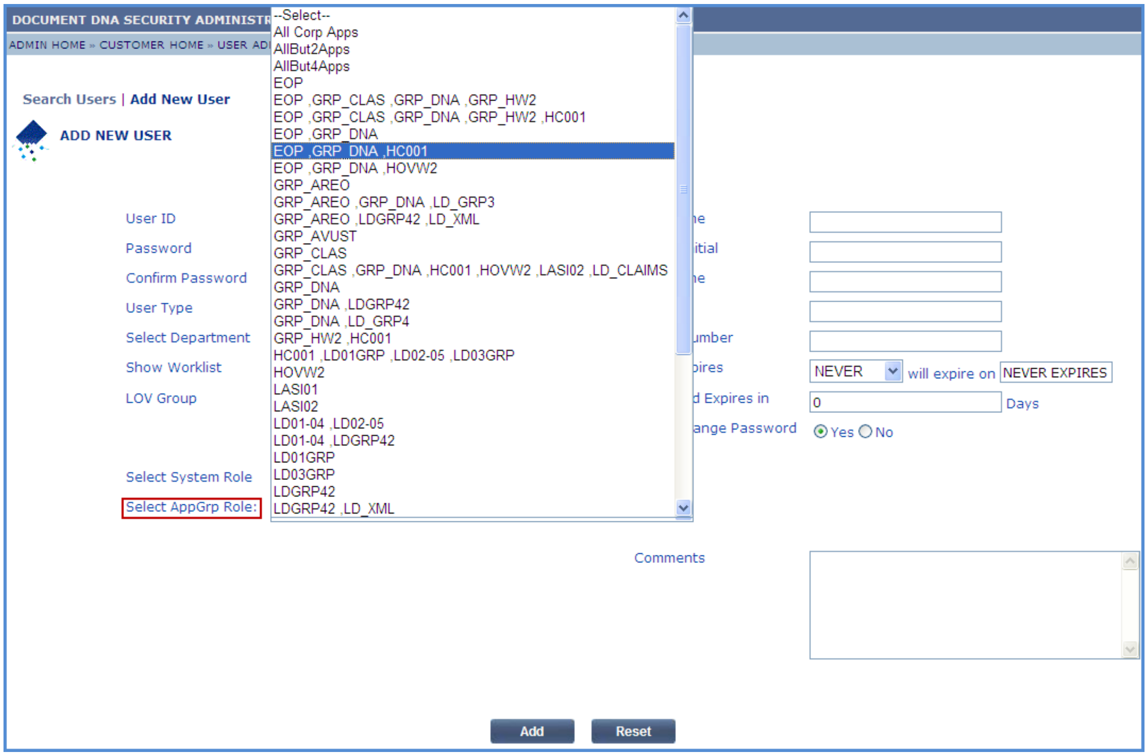
Add/Edit Annotation - Y
View Annotation - Y
Delete Annotation - Y
Enable Email - Y
Enable Fax - Y
Index Update - Y
Index Delete - Y
Web Upload - Y
Split Merge - N
Audit Trail - Y
Advanced Search - Read/Write/Execute

For Example,

- Add/Edit - The user can add/edit the documents in the documentdna site when Add/Edit Annotation is Y.
- View - The user can view the documents when View Annotation is Y.
- Delete – The user can delete the documents when Delete Annotation is Y.
- Enable Email - The user can utilize the email feature in the documentdna site when Enable Email is Y.
- Enable Fax - The user can utilize the Fax feature in the documentdna site when Enable Fax is Y.
- Index Update – The user can update the index when Index Update is Y.
- Index Delete - The user can delete the Index when Index Delete is Y.
- Web Upload – The user can access the web upload in the documentdna site when Web Upload is Y.
- Split Merge – The user cannot view the split merge option in the documentdna site when Split Merge is N.
- Audit Trail – The user can view the Audit Trail link when Audit Trail is Y.

- Advanced Search – The user cannot perform the advanced search when the Advanced Search is None.

13. The **Select AppGRP** Role field contains a drop-down list with many AppGRP roles.

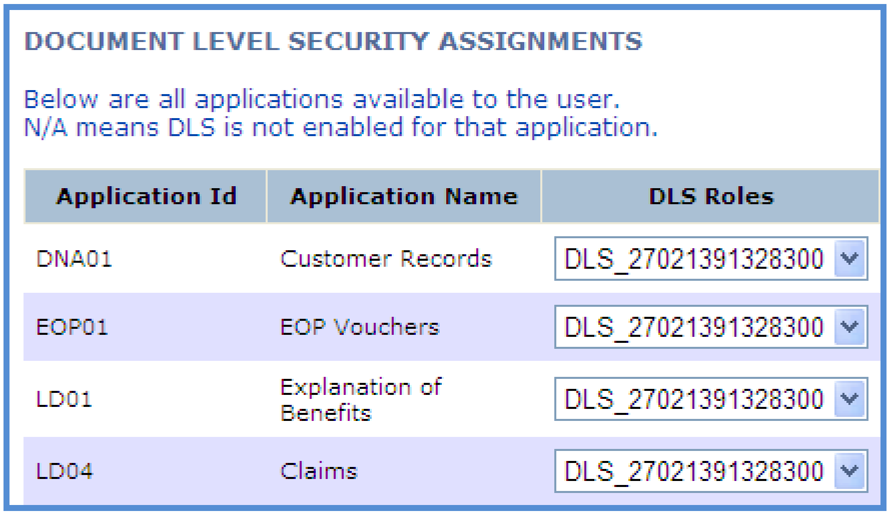


NEVER will expire on NEVER EXPIRES

0 Days

● Yes ○ No

14. When selecting a **AppGRP Rol**e, a list of available Application Groups for that role will be shown.

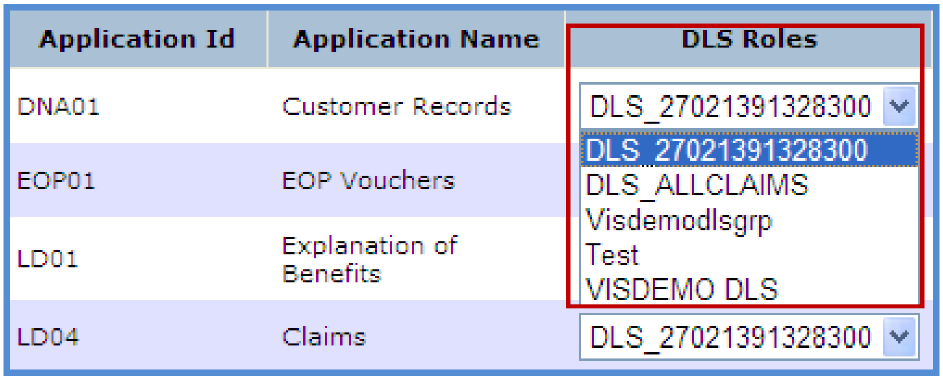


DOCUMENT LEVEL SECURITY ASSIGNMENTS

Below are all applications available to the user.
N/A means DLS is not enabled for that application.

| Application Id | Application Name | DLS Roles |
|---|---|---|
| DNA01 | Customer Records | DLS_27021391328300 |
| EOP01 | EOP Vouchers | DLS_27021391328300 |
| LD01 | Explanation of Benefits | DLS_27021391328300 |
| LD04 | Claims | DLS_27021391328300 |

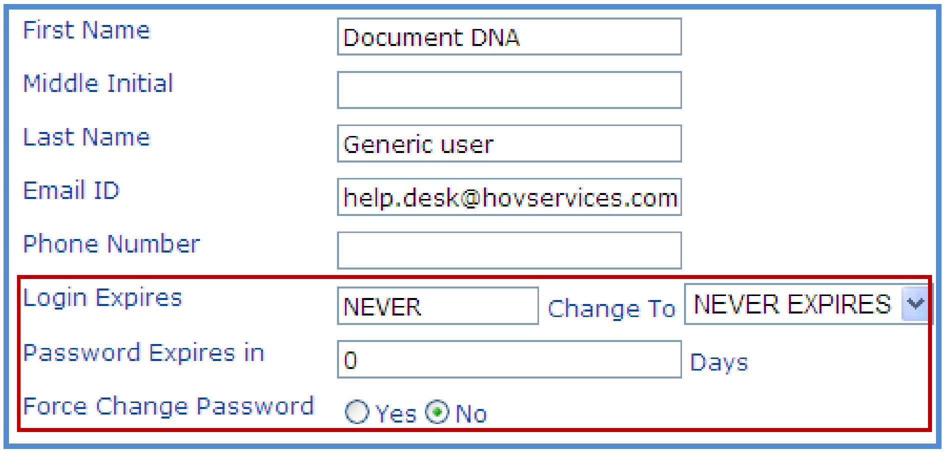
15. The DLS Roles field contains a drop-down list with many DLS Roles. Choose the appropriate DLS role.



| Application Id | Application Name | DLS Roles |
|---|---|---|
| DNA01 | Customer Records | DLS_27021391328300 |
| EOP01 | EOP Vouchers | |
| LD01 | Explanation of Benefits | |
| LD04 | Claims | DLS_27021391328300 |

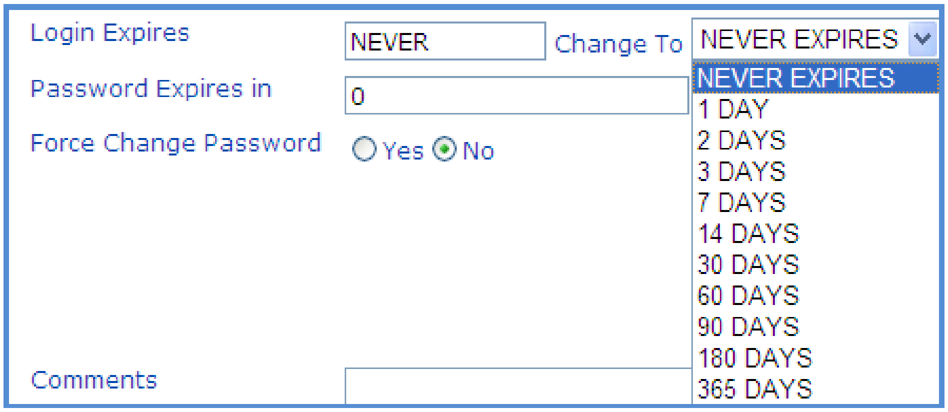
DLS_27021391328300
DLS_ALLCLAIMS
Visdemodlsgrp
Test
VISDEMO DLS

16. The login expiration days can be set up as shown below:



| | | | |
|---|---|---|---|
| First Name | Document DNA | | |
| Middle Initial | | | |
| Last Name | Generic user | | |
| Email ID | help.desk@hovservices.com | | |
| Phone Number | | | |
| Login Expires | NEVER | Change To | NEVER EXPIRES |
| Password Expires in | 0 | Days | |
| Force Change Password | ○ Yes ● No | | |

17. The user can change the change the expiration value by selecting the count of days from the **Change To** field.

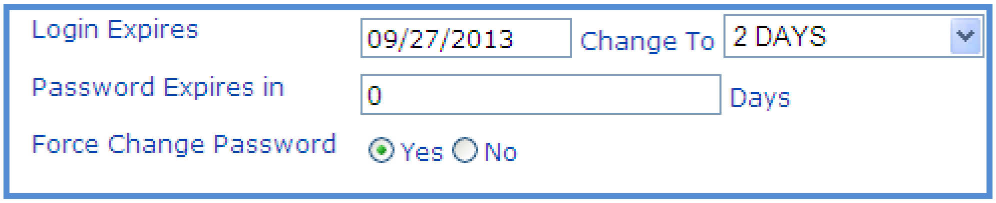


| | | | |
|---|---|---|---|
| Login Expires | NEVER | Change To | NEVER EXPIRES |
| Password Expires in | 0 | | |
| Force Change Password | ○ Yes ● No | | |
| Comments | | | |

NEVER EXPIRES
1 DAY
2 DAYS
3 DAYS
7 DAYS
14 DAYS
30 DAYS
60 DAYS
90 DAYS
180 DAYS
365 DAYS

18. Depending on the **Change To** value selected, the Login Expires filed will change accordingly.

**For Example**, if the user selects the Change To filed as 2 Days, then the Login Expires will change to its respective expiration date.



Login Expires 09/27/2013 Change To 2 DAYS

Password Expires in 0 Days

Force Change Password ● Yes ○ No

19. The user must enter the count of days for password expiration in the **Password Expires in** field.
20. By default, each time a user is added, updated, or modified, they are required to change their password upon their next login. Under certain circumstances it is desirable to bypass this default.

For Example, if a user's last name was changed due to marriage, it may not be practical for them to change their password after such an update.

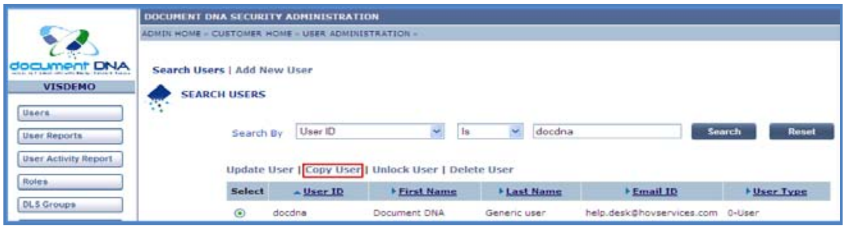
21. If required, enter the comments in the **Comments** box.
22. After providing the necessary information, click on the **Update** button to update the user information.
23. Click on the **Cancel** button to cancel the update.

**Copy User**

Use the **Copy User** to clone a single user. After locating a pattern user in the main Users screen, highlight their entry and click the Copy button. The pattern user's profile will be copied allowing the administrator to add the new user by specifying the new user's name, user ID, and password.

1. Select the appropriate value from the **Search By** field and its respective parameter value.
2. Click on the **Search** button.
3. The user's information such as the **User ID**, **First Name**, **Last Name**, **Email ID**, **User Type** appears.
4. The user should select the **User ID** and click on the **Copy User** link to create the new user.

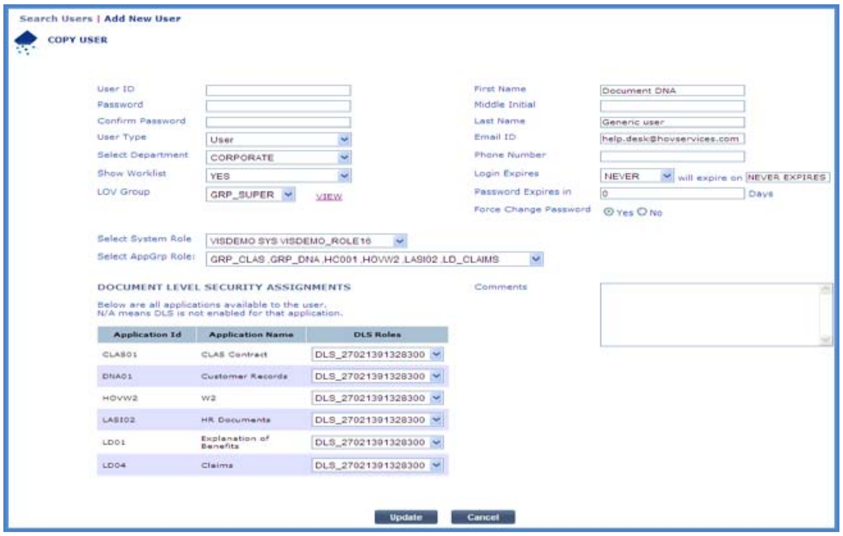
5. Click on the **Reset** button to clear the search values.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
document DNA
VISDEMO
Users
User Reports
User Activity Report
Roles
DLS Groups
Search Users | Add New User
SEARCH USERS
Search
Reset
Update User | Copy User | Unlock User | Delete User

Search By: User ID | Is | docdna

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ● | docdna | Document DNA | Generic user | help.desk@hovservices.com | 0-User |

6. The following screen appears with blank fields for the **User ID**, **Password**, **Confirm Password**.



| | | | |
|---|---|---|---|
| User ID | | First Name | Document DNA |
| Password | | Middle Initial | |
| Confirm Password | | Last Name | Generic user |
| User Type | User | Email ID | help.desk@hovservices.com |
| Select Department | CORPORATE | Phone Number | |
| Show Worklist | YES | Login Expires | NEVER will expire on NEVER EXPIRES |
| LOV Group | GRP_SUPER | Password Expires in | 0 Days |
| | | Force Change Password | ● Yes ○ No |

Select System Role: VISDEMO SYS VISDEMO_ROLE16

Select AppGrp Role: GRP_CLAS ,GRP_DNA ,HC001 ,HOVW2 ,LASI02 ,LD_CLAIMS

DOCUMENT LEVEL SECURITY ASSIGNMENTS

Below are all applications available to the user.
N/A means DLS is not enabled for that application.

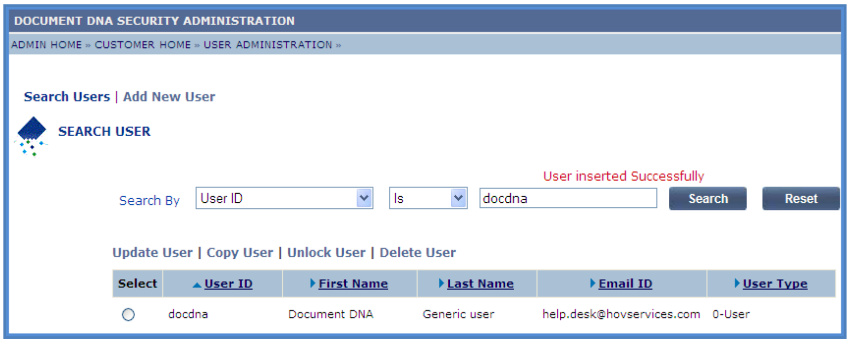
Comments

| Application Id | Application Name | DLS Roles |
|---|---|---|
| CLAS01 | CLAS Contract | DLS_27021391328300 |
| DNA01 | Customer Records | DLS_27021391328300 |
| HOVW2 | W2 | DLS_27021391328300 |
| LASI02 | HR Documents | DLS_27021391328300 |
| LD01 | Explanation of Benefits | DLS_27021391328300 |
| LD04 | Claims | DLS_27021391328300 |

7. Enter the **User ID**, **Password** and **Confirm Password**.

8. After providing the necessary information, click on the **Update** button to add the copied user.

9. The '**User inserted Successfully**' message appears as shown below.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
Search Users | Add New User
SEARCH USER
Search
Reset
Update User | Copy User | Unlock User | Delete User

User inserted Successfully

Search By: User ID | Is | docdna

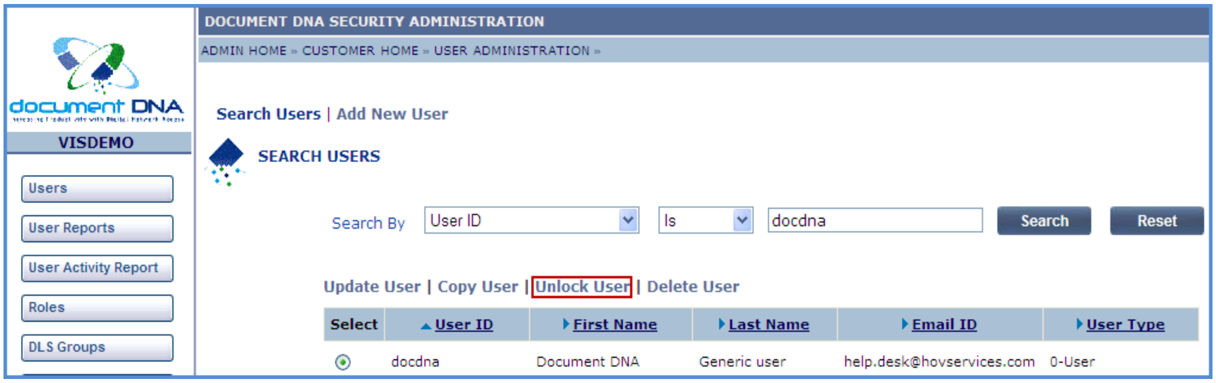
| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ○ | docdna | Document DNA | Generic user | help.desk@hovservices.com | 0-User |

## Unlock User

Use the **Unlock User** to Remove the password lock that occurs once a user fails to login on three consecutive attempts.

Use the **Unlock** function to remove the 'Maximum Failed Login Attempts' lock that is placed on an user account following their third failed login attempt. No indication of a locked account is currently available in the administration module, however, the error message 'Please contact the system administrator for help' will be displayed on the user's login screen. This indicates that the account is locked.

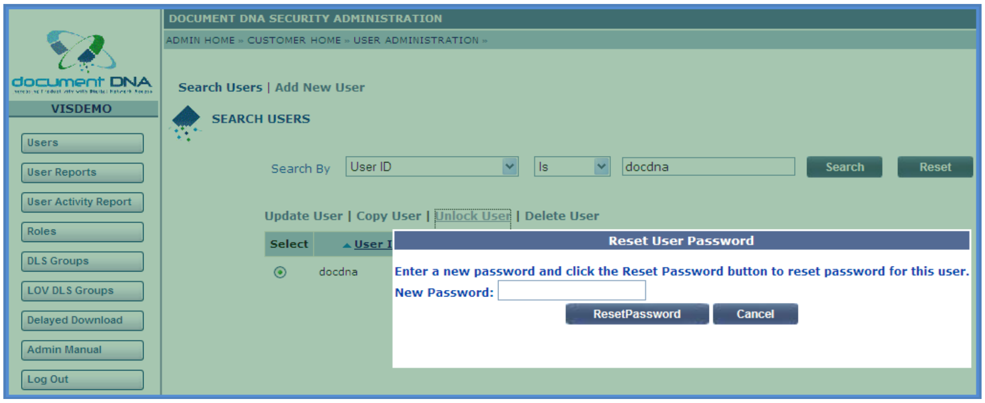
1. Select the appropriate value from the **Search By** field and its respective parameter value.
2. Click on the **Search** button.
3. The user's information such as the **User ID**, **First Name**, **Last Name**, **Email ID**, **User Type** appears.
4. The user should select the User ID and click on the **Unlock User** link to unlock the password.
5. Click on the **Reset** button to clear the search values.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
VISDEMO
Users
User Reports
User Activity Report
Roles
DLS Groups
Search Users | Add New User
SEARCH USERS
Search
Reset
Update User | Copy User | Unlock User | Delete User

Search By: User ID | Is | docdna

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ● | docdna | Document DNA | Generic user | help.desk@hovservices.com | 0-User |

6. The user will find the **Reset User Password** dialog box.
7. Enter the new password and click on the **Reset Password** button.
8. Click on the **Cancel** button to cancel the action.


document DNA
VISDEMO
Users
User Reports
User Activity Report
Roles
DLS Groups
LOV DLS Groups
Delayed Download
Admin Manual
Log Out
DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
Search Users | Add New User
SEARCH USERS
Search
Reset
Update User | Copy User | Unlock User | Delete User
ResetPassword
Cancel

Search By: User ID | Is | docdna

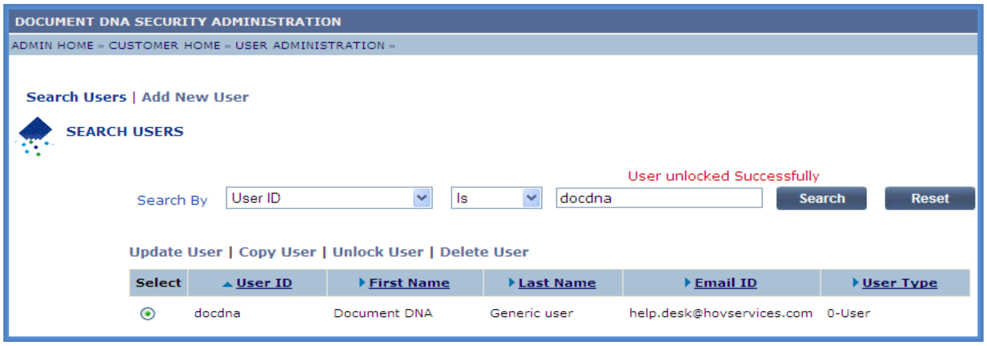
| Select | User I |
|---|---|
| ○ | docdna |

**Reset User Password**

Enter a new password and click the Reset Password button to reset password for this user.

New Password:

9. The '**User unlocked Successfully**' message appears as shown below.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
Search Users | Add New User
SEARCH USERS
Search
Reset
Update User | Copy User | Unlock User | Delete User

User unlocked Successfully

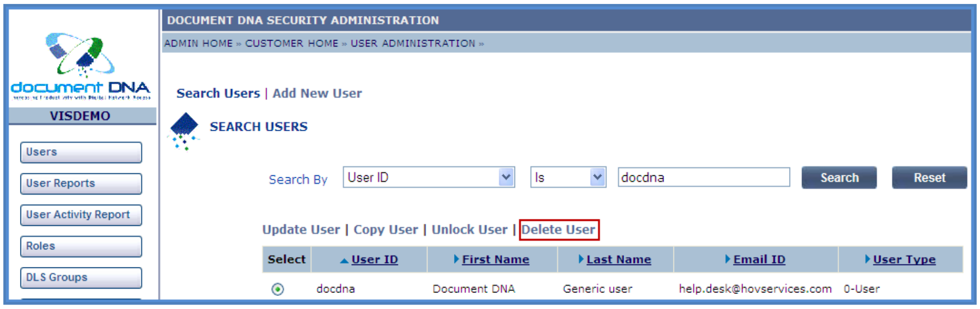
Search By: User ID | Is | docdna

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ○ | docdna | Document DNA | Generic user | help.desk@hovservices.com | 0-User |

## Delete User

Use **Delete User** to completely remove an existing user from the system.

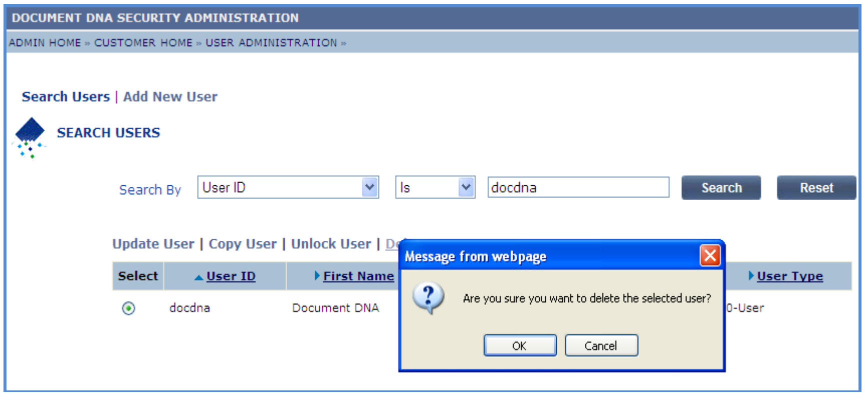
1. Select the appropriate value from the **Search By** field and its respective parameter value.
2. Click on the **Search** button.
3. The user's information such as the **User ID**, **First Name**, **Last Name**, **Email ID**, **User Type** appears.
4. The user should select the **User ID** and click on the **Delete User** link to delete the password.


document DNA
VISDEMO
Users
User Reports
User Activity Report
Roles
DLS Groups
DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »
Search Users | Add New User
SEARCH USERS
Search
Reset
Update User | Copy User | Unlock User | Delete User

Search By: User ID | Is | docdna

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ○ | docdna | Document DNA | Generic user | help.desk@hovservices.com | 0-User |

5. The user will find the **Delete the selected user** dialog box.
6. Click on the **OK** button.
7. Click on the **Cancel** button to cancel the action.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | Add New User

SEARCH USERS

Search By: User ID | Is | docdna

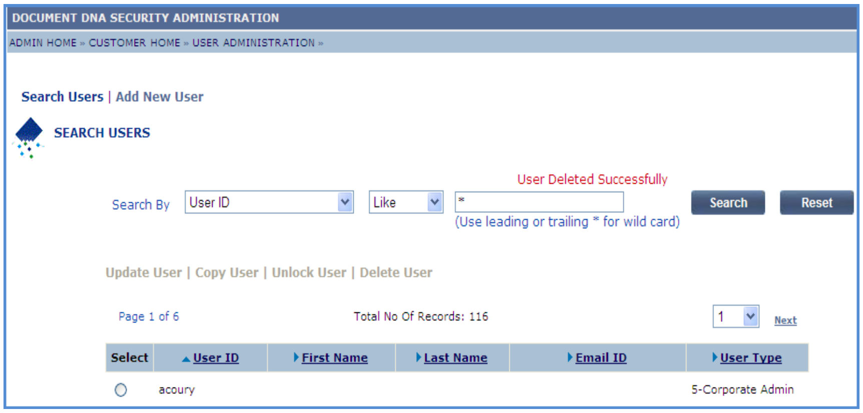
Update User | Copy User | Unlock User | De

| Select | User ID | First Name | User Type |
|---|---|---|---|
| ● | docdna | Document DNA | 0-User |

Message from webpage

Are you sure you want to delete the selected user?

8. The '**User Deleted Successfully**' message appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | Add New User

SEARCH USERS

User Deleted Successfully

Search By: User ID | Like | *

(Use leading or trailing * for wild card)

Update User | Copy User | Unlock User | Delete User

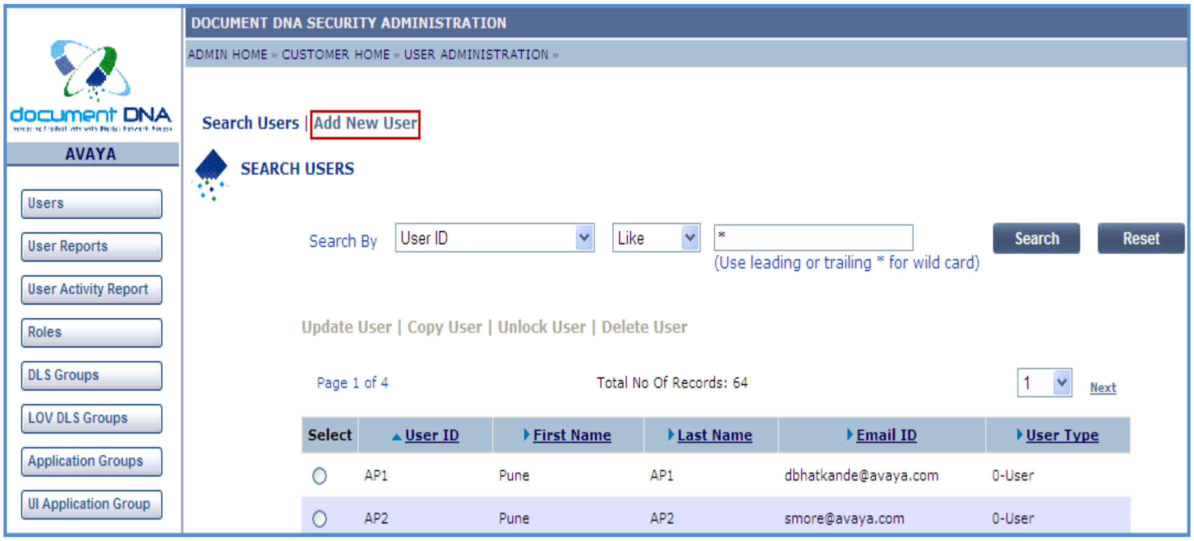
Page 1 of 6 Total No Of Records: 116 1 Next

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ○ | acoury | | | | 5-Corporate Admin |

### 4.2.2. ADD New User

Use the **Add New User** to add a new user if no pattern user is readily available.

1. Click on the **Add New User** link.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | Add New User

SEARCH USERS

Search By: User ID | Like | *

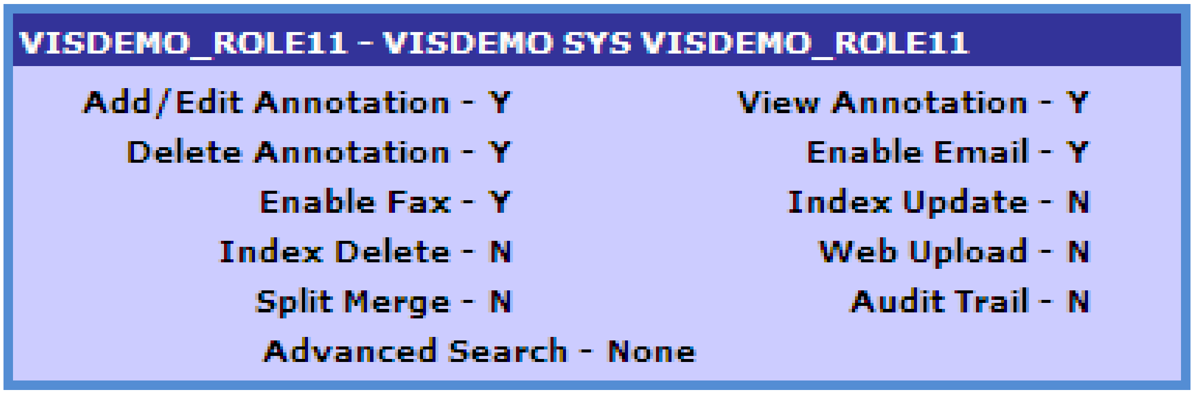
(Use leading or trailing * for wild card)

Update User | Copy User | Unlock User | Delete User

Page 1 of 4 Total No Of Records: 64 1

| Select | User ID | First Name | Last Name | Email ID | User Type |
|---|---|---|---|---|---|
| ○ | AP1 | Pune | AP1 | dbhatkande@avaya.com | 0-User |
| ○ | AP2 | Pune | AP2 | smore@avaya.com | 0-User |

2. Enter the **User ID**, **First Name**, **Password**, **Middle Name**, **Confirm Password**, **Last Name**, **Email ID** and **Phone Number**.
3. Select the **User Type** from the drop-down list and select the **Department**.
4. Choose **Yes** or **No** for the **Show Worklist** field.
5. Select the **LOV Group**.
6. Select the **System Role**. The user will find the **See Details** link that appears right to the System Role field. The user must perform a mouse over action on the See Details link.



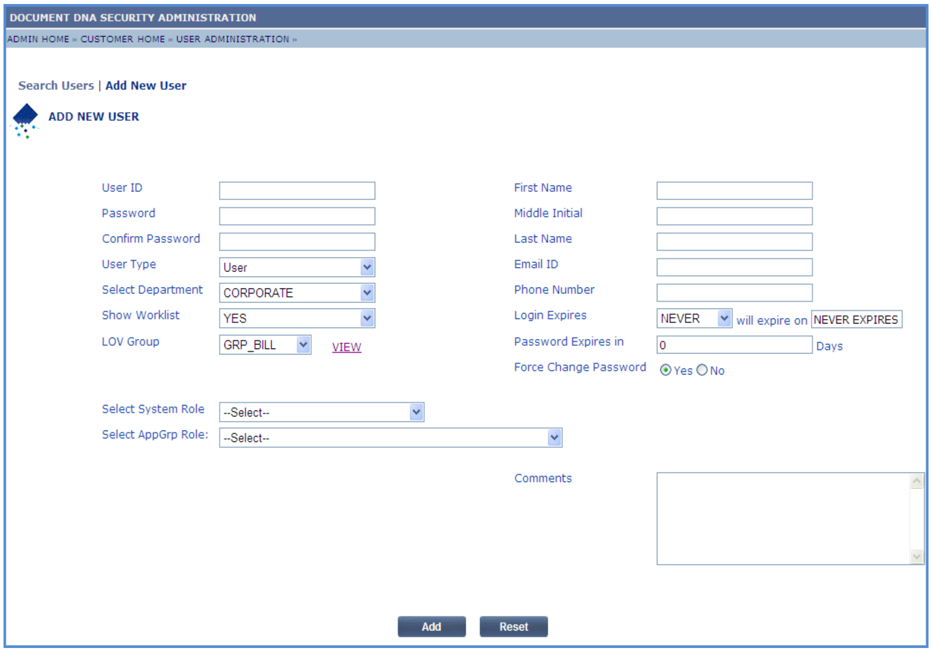
VISDEMO_ROLE11 - VISDEMO SYS VISDEMO_ROLE11

| | |
|---|---|
| Add/Edit Annotation - Y | View Annotation - Y |
| Delete Annotation - Y | Enable Email - Y |
| Enable Fax - Y | Index Update - N |
| Index Delete - N | Web Upload - N |
| Split Merge - N | Audit Trail - N |
| Advanced Search - None | |

For Example,

- Add/Edit - The user can add/edit the documents in the documentdna site when Add/Edit Annotation is Y.
- View - The user can view the documents when View Annotation is Y.
- Delete – The user can delete the documents when Delete Annotation is Y.
- Enable Email - The user can utilize the email feature in the documentdna site when Enable Email is Y.
- Enable Fax - The user can utilize the Fax feature in the documentdna site when Enable Fax is Y.
- Index Update – The user cannot update the index when Index Update is N.
- Index Delete - The user cannot delete the Index when Index Delete is N.
- Web Upload – The user cannot access the web upload in the documentdna site when Web Upload is N.
- Split Merge – The user cannot view the split merge option in the documentdna site when Split Merge is N.
- Audit Trail – The user cannot view the Audit Trail link when Audit Trail is N.
- Advanced Search – The user cannot perform the advanced search when the Advanced Search is none.

7. Select the **AppGrp Role**.
8. Complete the **Login Expiration** details.
9. After providing the necessary information, click on the **Add** button to add the user. New users can access the system immediately following setup.
10. Click on the **Reset** button to clear the fields.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | **Add New User**

**ADD NEW USER**

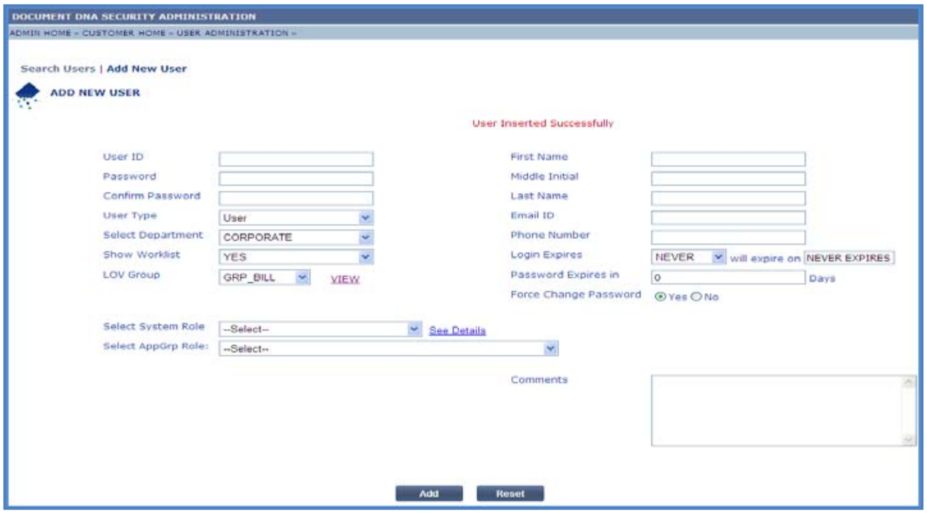
User ID
Password
Confirm Password
User Type: User
Select Department: CORPORATE
Show Worklist: YES
LOV Group: GRP_BILL VIEW

First Name
Middle Initial
Last Name
Email ID
Phone Number
Login Expires: NEVER will expire on NEVER EXPIRES
Password Expires in: 0 Days
Force Change Password: ● Yes ○ No

Select System Role: --Select--
Select AppGrp Role: --Select--

Comments

11. The '**User Inserted Successfully**' message appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | **Add New User**

**ADD NEW USER**

User Inserted Successfully

User ID
Password
Confirm Password
User Type: User
Select Department: CORPORATE
Show Worklist: YES
LOV Group: GRP_BILL VIEW

First Name
Middle Initial
Last Name
Email ID
Phone Number
Login Expires: NEVER will expire on NEVER EXPIRES
Password Expires in: 0 Days
Force Change Password: ● Yes ○ No

Select System Role: --Select-- See Details
Select AppGrp Role: --Select--

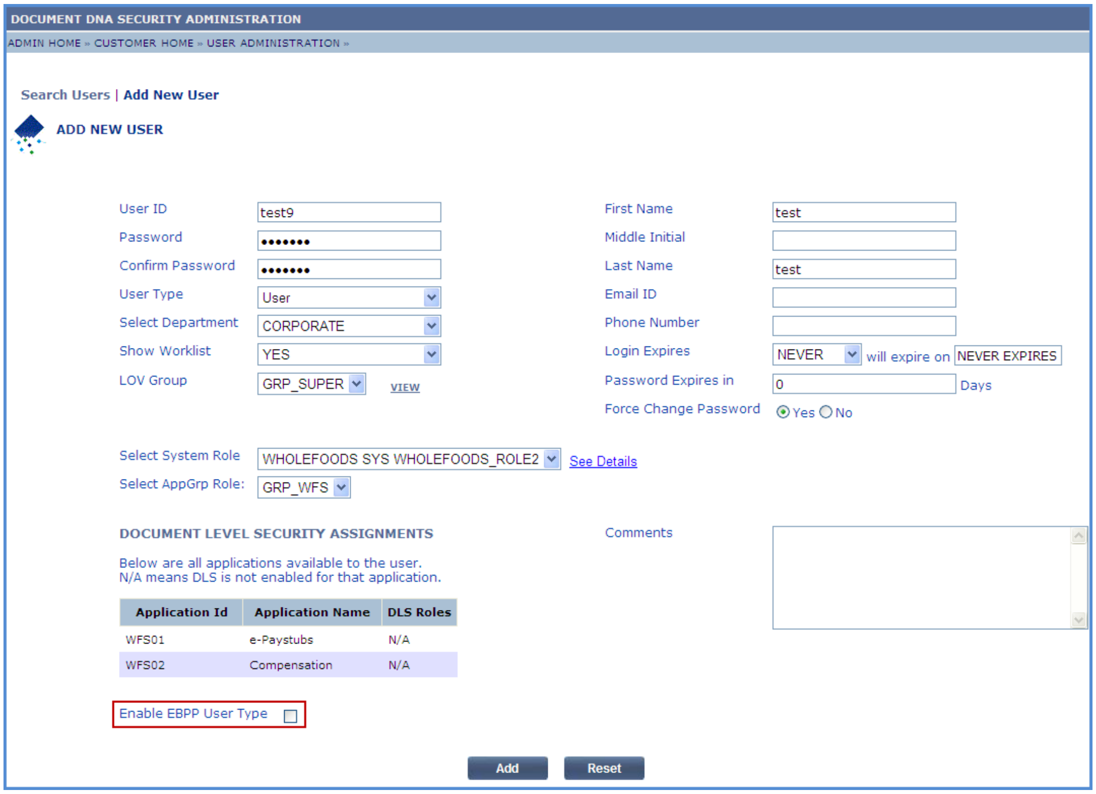
Comments

## EBPP Customers

There is an additional functionality For **EBPP** customers, namely the Carquest, Kelly, Whole Foods and so on.

1. While adding a new user, **Enable Ebpp User Type** checkbox appears on the **Add New** User page.

🗁 **Note: An EBPP customer must be selected in the Customer list on the Customer Administration page.**



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | Add New User

ADD NEW USER

| | | | |
|---|---|---|---|
| User ID | test9 | First Name | test |
| Password | ••••••• | Middle Initial | |
| Confirm Password | ••••••• | Last Name | test |
| User Type | User | Email ID | |
| Select Department | CORPORATE | Phone Number | |
| Show Worklist | YES | Login Expires | NEVER will expire on NEVER EXPIRES |
| LOV Group | GRP_SUPER VIEW | Password Expires in | 0 Days |
| | | Force Change Password | ● Yes ○ No |

Select System Role: WHOLEFOODS SYS WHOLEFOODS_ROLE2 See Details

Select AppGrp Role: GRP_WFS

DOCUMENT LEVEL SECURITY ASSIGNMENTS

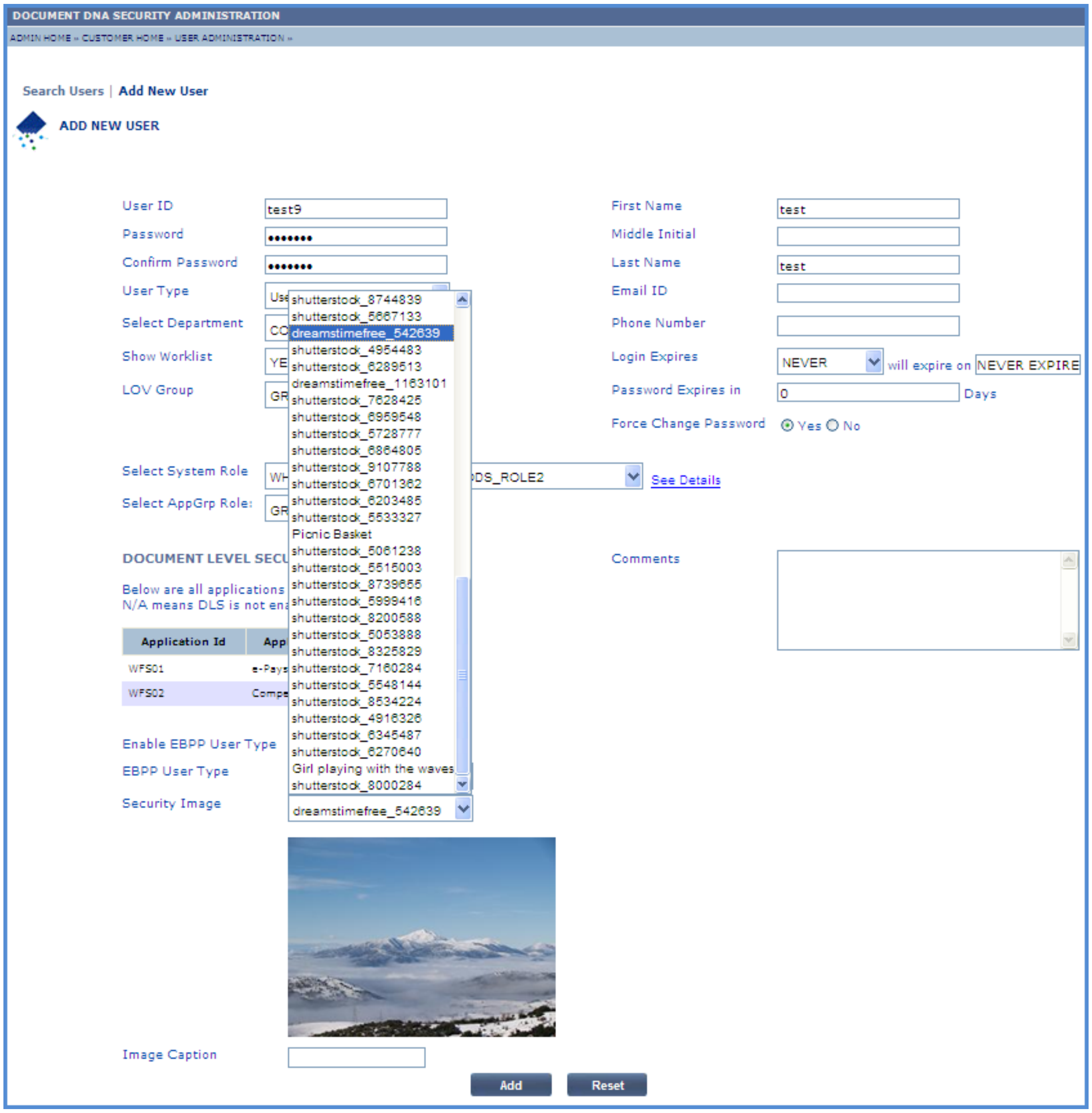
Below are all applications available to the user.
N/A means DLS is not enabled for that application.

| Application Id | Application Name | DLS Roles |
|---|---|---|
| WFS01 | e-Paystubs | N/A |
| WFS02 | Compensation | N/A |

Comments

Enable EBPP User Type □

2. The **Security Image** drop-down list appears from which the user can select an image for the security purpose.
3. Enter appropriate Caption for the selected image in the **Enter Caption for Security Image** field.
4. Select the **User Type** as either Help-Desk Admin or Corporate Admin.



**DOCUMENT DNA SECURITY ADMINISTRATION**

ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »

Search Users | **Add New User**

**ADD NEW USER**

|  |  |  |  |
|---|---|---|---|
| User ID | test9 | First Name | test |
| Password | ••••••• | Middle Initial |  |
| Confirm Password | ••••••• | Last Name | test |
| User Type | Use | Email ID |  |
| Select Department | CO | Phone Number |  |
| Show Worklist | YE | Login Expires | NEVER will expire on NEVER EXPIRE |
| LOV Group | GR | Password Expires in | 0 Days |
|  |  | Force Change Password | ● Yes ○ No |
| Select System Role | WH DS_ROLE2 See Details |  |  |
| Select AppGrp Role: | GR |  |  |

**DOCUMENT LEVEL SECU**

Below are all applications
N/A means DLS is not ena

| Application Id | App |
|---|---|
| WFS01 | e-Pays |
| WFS02 | Compe |

Comments

Enable EBPP User Type

EBPP User Type

Security Image: dreamstimefree_542639

Image Caption

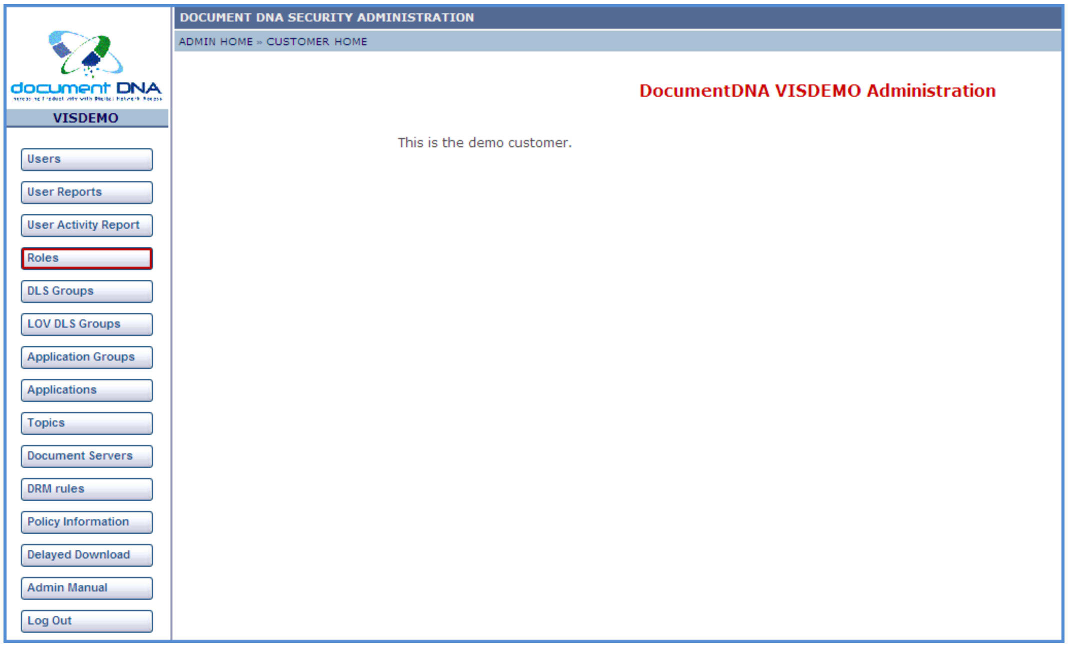
5. Click the **Add** button to add the Ebpp user.

6. Click the **Reset** button to reset the values.

7. The **User Inserted Successfully** message appears.

## 4.3. Roles

1. Click on the **Roles** button that appears on the left pane.



DOCUMENT DNA SECURITY ADMINISTRATION

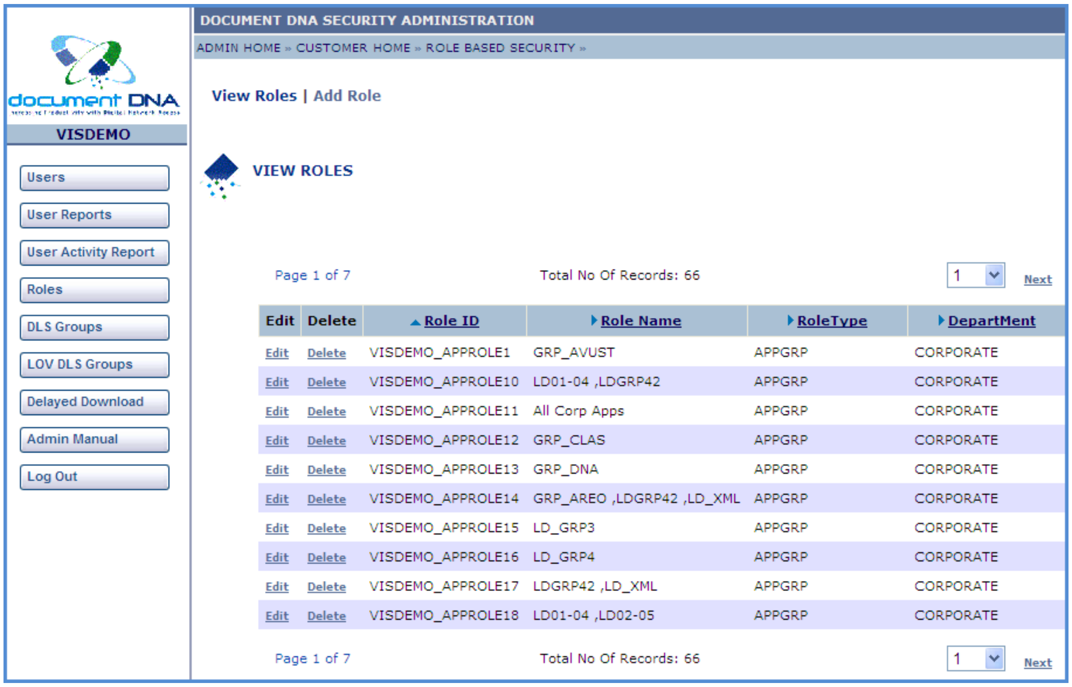
ADMIN HOME » CUSTOMER HOME

DocumentDNA VISDEMO Administration

This is the demo customer.

2. The Role's page consists of two options namely – **View Roles** and **Add Role**.

🗁 **Note:** The **View Roles** page is the default page.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

VIEW ROLES

Page 1 of 7 Total No Of Records: 66 1 Next

| Edit | Delete | Role ID | Role Name | RoleType | DepartMent |
|---|---|---|---|---|---|
| Edit | Delete | VISDEMO_APPROLE1 | GRP_AVUST | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE10 | LD01-04 ,LDGRP42 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE11 | All Corp Apps | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE12 | GRP_CLAS | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE13 | GRP_DNA | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE14 | GRP_AREO ,LDGRP42 ,LD_XML | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE15 | LD_GRP3 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE16 | LD_GRP4 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE17 | LDGRP42 ,LD_XML | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE18 | LD01-04 ,LD02-05 | APPGRP | CORPORATE |

Page 1 of 7 Total No Of Records: 66 1 Next

### 4.3.1. View Roles

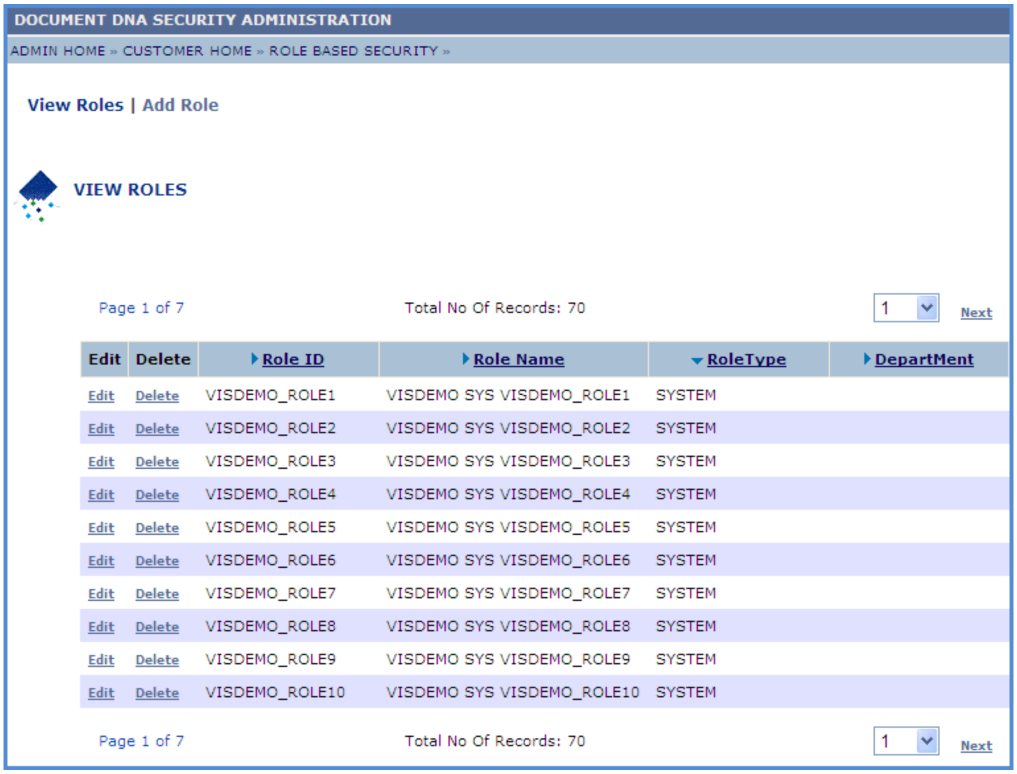
The View Roles page enables the roles to edit and delete for role based security. Roles are of three types

- System Roles
- App GRP Roles
- App DLS Roles

**Edit Role**

**System Role**

1. Select the **RoleType** as **SYSTEM** from the results table in the View Roles page.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

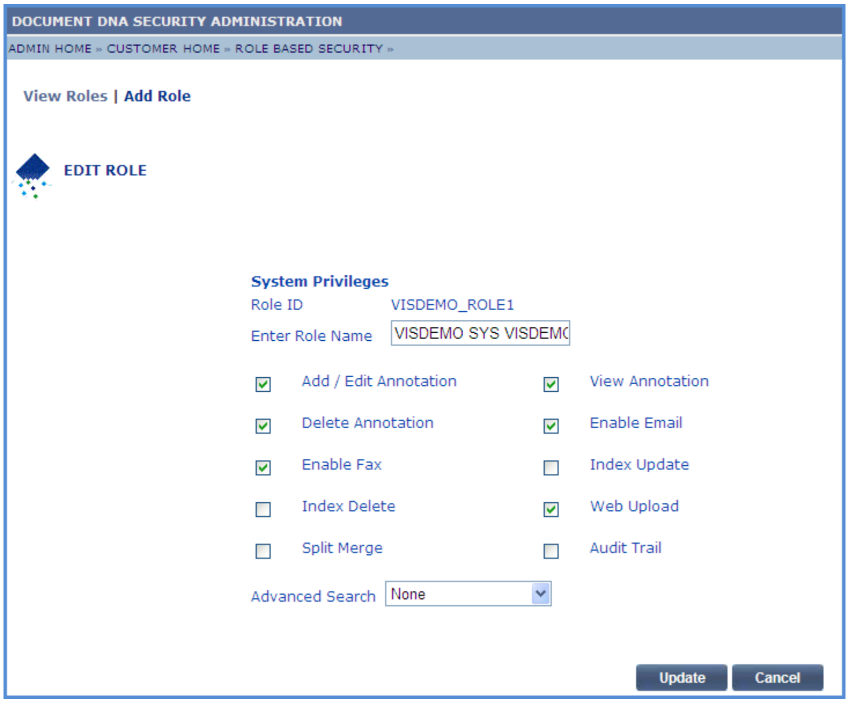
VIEW ROLES

Page 1 of 7 Total No Of Records: 70 1 Next

| Edit | Delete | Role ID | Role Name | RoleType | DepartMent |
|---|---|---|---|---|---|
| Edit | Delete | VISDEMO_ROLE1 | VISDEMO SYS VISDEMO_ROLE1 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE2 | VISDEMO SYS VISDEMO_ROLE2 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE3 | VISDEMO SYS VISDEMO_ROLE3 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE4 | VISDEMO SYS VISDEMO_ROLE4 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE5 | VISDEMO SYS VISDEMO_ROLE5 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE6 | VISDEMO SYS VISDEMO_ROLE6 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE7 | VISDEMO SYS VISDEMO_ROLE7 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE8 | VISDEMO SYS VISDEMO_ROLE8 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE9 | VISDEMO SYS VISDEMO_ROLE9 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE10 | VISDEMO SYS VISDEMO_ROLE10 | SYSTEM | |

Page 1 of 7 Total No Of Records: 70 1 Next

2. Click on the **Edit** link for the required **Role ID** that requires changes on the System Roles.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
EDIT ROLE
Update
Cancel

**System Privileges**

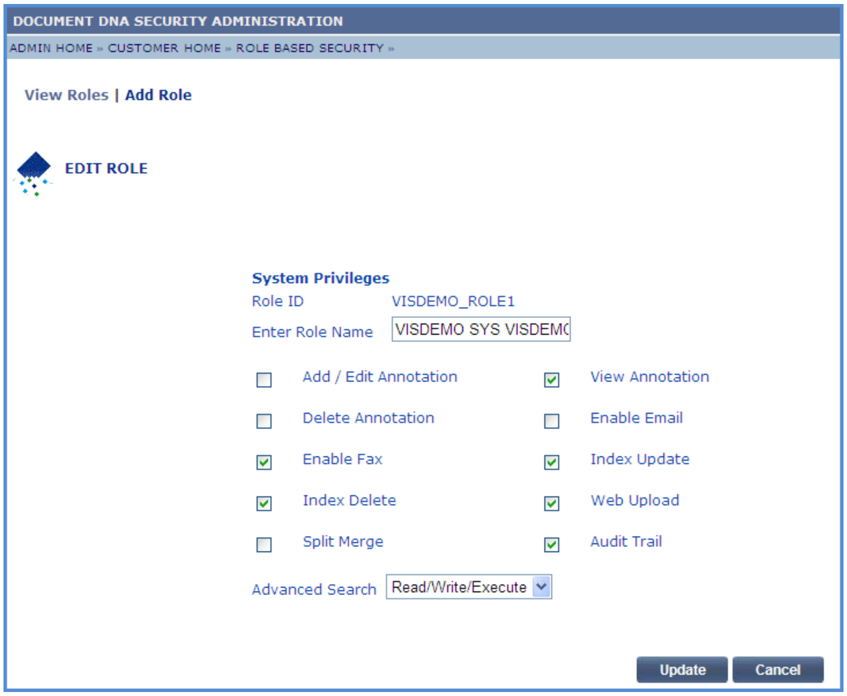
Role ID VISDEMO_ROLE1

Enter Role Name VISDEMO SYS VISDEMO

|  |  |
|---|---|
| ☑ Add / Edit Annotation | ☑ View Annotation |
| ☑ Delete Annotation | ☑ Enable Email |
| ☑ Enable Fax | □ Index Update |
| □ Index Delete | ☑ Web Upload |
| □ Split Merge | □ Audit Trail |

Advanced Search None

3. The **Role ID**, **Role Name** fields will be auto populated for the selected Role ID.
4. Edit the **System Privileges** and **Advanced Search**.
5. Click on the **Update** button.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
EDIT ROLE
Update
Cancel

**System Privileges**

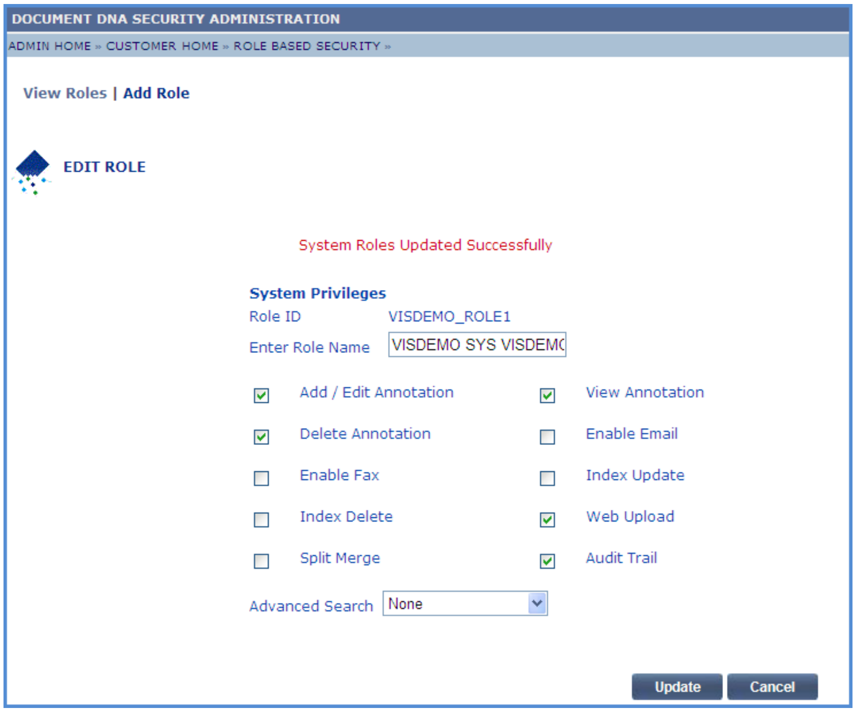
Role ID VISDEMO_ROLE1

Enter Role Name VISDEMO SYS VISDEMO

|  |  |
|---|---|
| □ Add / Edit Annotation | ☑ View Annotation |
| □ Delete Annotation | □ Enable Email |
| ☑ Enable Fax | ☑ Index Update |
| ☑ Index Delete | ☑ Web Upload |
| □ Split Merge | ☑ Audit Trail |

Advanced Search Read/Write/Execute

6. The '**System Roles updated Successfully**' appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

EDIT ROLE

System Roles Updated Successfully

System Privileges

Role ID VISDEMO_ROLE1

Enter Role Name VISDEMO SYS VISDEMC

☑ Add / Edit Annotation ☑ View Annotation

☑ Delete Annotation □ Enable Email

□ Enable Fax □ Index Update

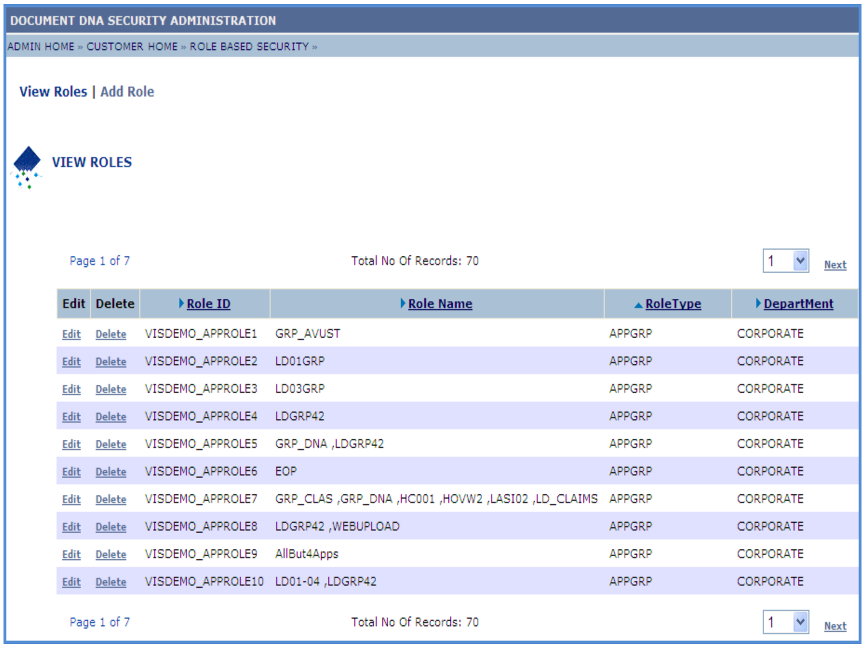
□ Index Delete ☑ Web Upload

□ Split Merge ☑ Audit Trail

Advanced Search None

## AppGRP Role

1. Select the **RoleType** as **APPGRP** from the results table in the View Roles page.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

VIEW ROLES

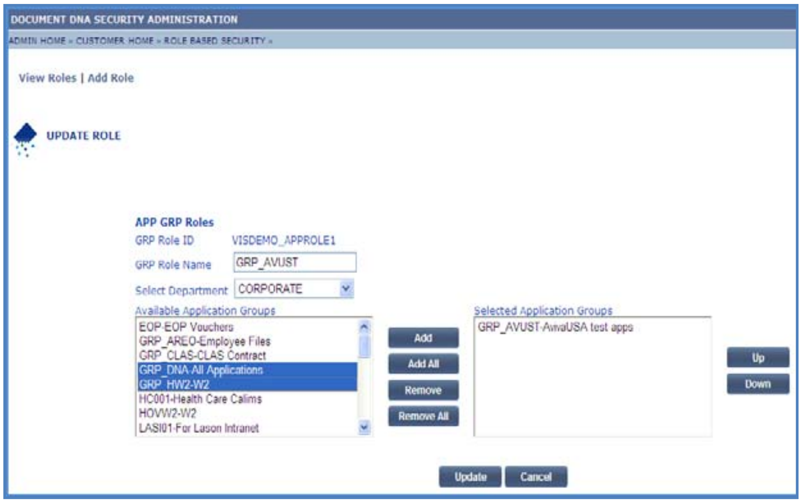
Page 1 of 7 Total No Of Records: 70 1 Next

| Edit | Delete | Role ID | Role Name | RoleType | DepartMent |
|---|---|---|---|---|---|
| Edit | Delete | VISDEMO_APPROLE1 | GRP_AVUST | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE2 | LD01GRP | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE3 | LD03GRP | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE4 | LDGRP42 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE5 | GRP_DNA ,LDGRP42 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE6 | EOP | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE7 | GRP_CLAS ,GRP_DNA ,HC001 ,HOVW2 ,LASI02 ,LD_CLAIMS | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE8 | LDGRP42 ,WEBUPLOAD | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE9 | AllBut4Apps | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE10 | LD01-04 ,LDGRP42 | APPGRP | CORPORATE |

Page 1 of 7 Total No Of Records: 70 1 Next

2. Click on the **Edit** link for the required Role ID that requires changes on the application groups.
3. The **GRP Role ID**, **GRP Role Name**, **Select Department** fields will be auto populated for the selected Role ID.
4. The application groups that are available will be listed under **Available Application Groups**.
5. Choose the appropriate group or groups for the user being created.

🗁 **Note:** Hold the **Ctrl** key allows selecting more than one group at a time.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
UPDATE ROLE
Add
Add All
Remove
Remove All
Up
Down
Update
Cancel

APP GRP Roles

GRP Role ID VISDEMO_APPROLE1

GRP Role Name GRP_AVUST

Select Department CORPORATE

Available Application Groups

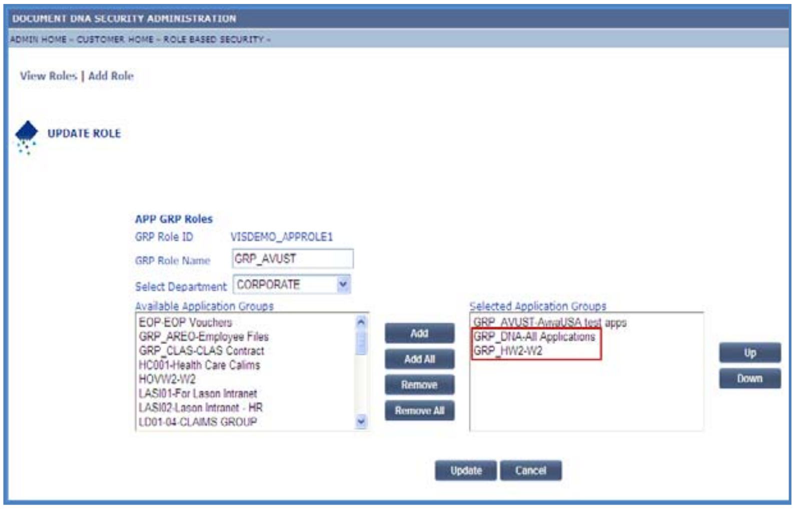
EOP-EOP Vouchers
GRP_AREO-Employee Files
GRP_CLAS-CLAS Contract
GRP_DNA-All Applications
GRP_HW2-W2
HC001-Health Care Calims
HOVW2-W2
LASI01-For Lason Intranet

Selected Application Groups

GRP_AVUST-AvvaUSA test apps

6. Click on the **Add** button.

🗁 **Note:** Contact the documentDNA Help Desk or a Corporate Administrator if the desired department is not available.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
UPDATE ROLE
Add
Add All
Remove
Remove All
Up
Down
Update
Cancel

APP GRP Roles

GRP Role ID VISDEMO_APPROLE1

GRP Role Name GRP_AVUST

Select Department CORPORATE

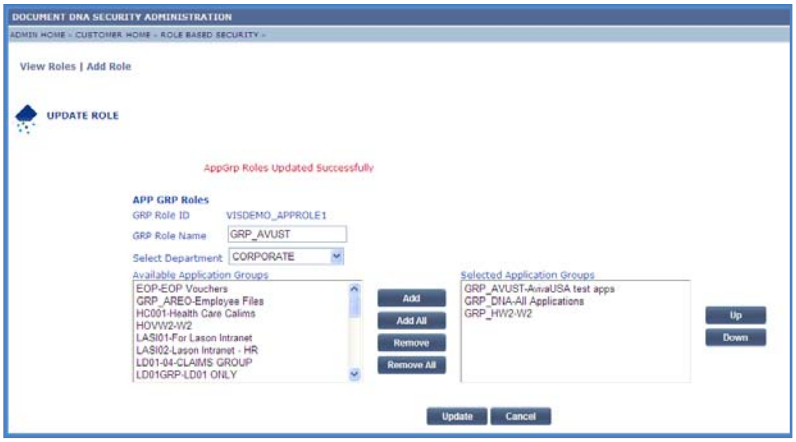
Available Application Groups

EOP-EOP Vouchers
GRP_AREO-Employee Files
GRP_CLAS-CLAS Contract
HC001-Health Care Calims
HOVW2-W2
LASI01-For Lason Intranet
LASI02-Lason Intranet - HR
LD01-04-CLAIMS GROUP

Selected Application Groups

GRP_AVUST-AvvaUSA test apps
GRP_DNA-All Applications
GRP_HW2-W2

7. The customer administrator also has the options to add all the groups, remove a group or all groups using the **Add All**, **Remove**, and **Remove All** for the **Selected Application Groups** respectively.
8. The customer administrator also has the ability to adjust the order in which the applications will appear for the user by using the **UP** and **DOWN** buttons to the right of the **Selected Application Groups** list.
9. Click on the **Update** button.
10. The '**AppGrp Roles updated Successfully**' appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

UPDATE ROLE

AppGrp Roles Updated Successfully

APP GRP Roles

GRP Role ID VISDEMO_APPROLE1

GRP Role Name GRP_AVUST

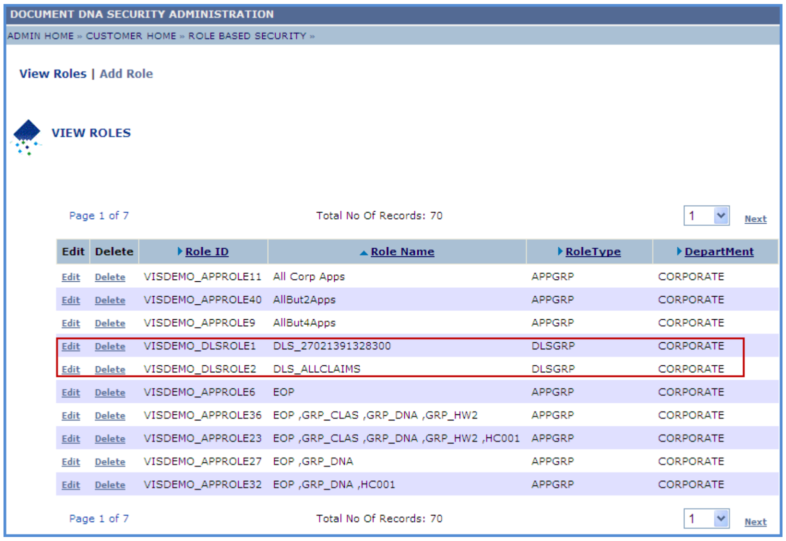
Select Department CORPORATE

Available Application Groups
EOP-EOP Vouchers
GRP_AREO-Employee Files
HC001-Health Care Calims
HOVW2-W2
LASI01-For Lason Intranet
LASI02-Lason Intranet - HR
LD01-04-CLAIMS GROUP
LD01GRP-LD01 ONLY

Selected Application Groups
GRP_AVUST-AvivaUSA test apps
GRP_DNA-All Applications
GRP_HW2-W2

## DLS Roles

1. Select the **RoleType** as **DLSGRP** from the results table in the View Roles page.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

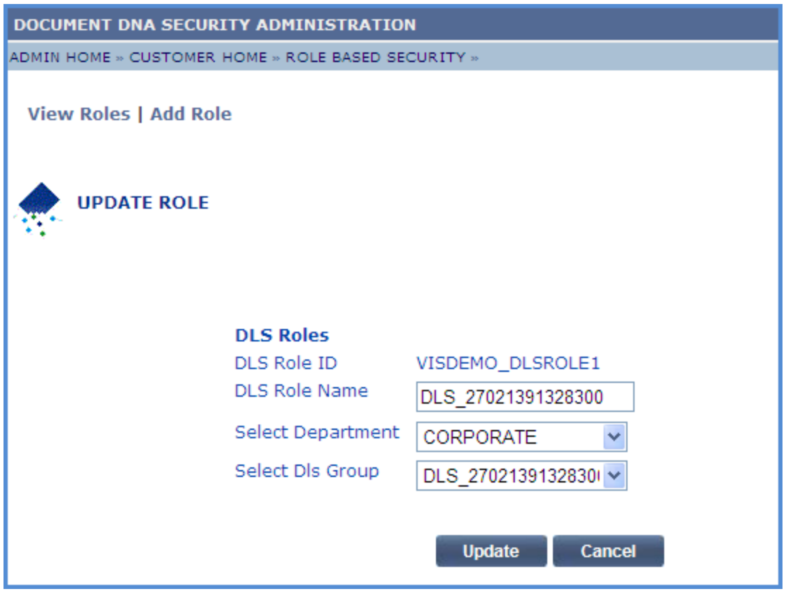
VIEW ROLES

Page 1 of 7 Total No Of Records: 70 1 Next

| Edit | Delete | Role ID | Role Name | RoleType | DepartMent |
|---|---|---|---|---|---|
| Edit | Delete | VISDEMO_APPROLE11 | All Corp Apps | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE40 | AllBut2Apps | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE9 | AllBut4Apps | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_DLSROLE1 | DLS_27021391328300 | DLSGRP | CORPORATE |
| Edit | Delete | VISDEMO_DLSROLE2 | DLS_ALLCLAIMS | DLSGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE6 | EOP | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE36 | EOP ,GRP_CLAS ,GRP_DNA ,GRP_HW2 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE23 | EOP ,GRP_CLAS ,GRP_DNA ,GRP_HW2 ,HC001 | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE27 | EOP ,GRP_DNA | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE32 | EOP ,GRP_DNA ,HC001 | APPGRP | CORPORATE |

Page 1 of 7 Total No Of Records: 70 1 Next

2. Click on the **Edit** link for the required Role ID that requires changes on the DLS Roles.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
UPDATE ROLE
Update
Cancel

DLS Roles

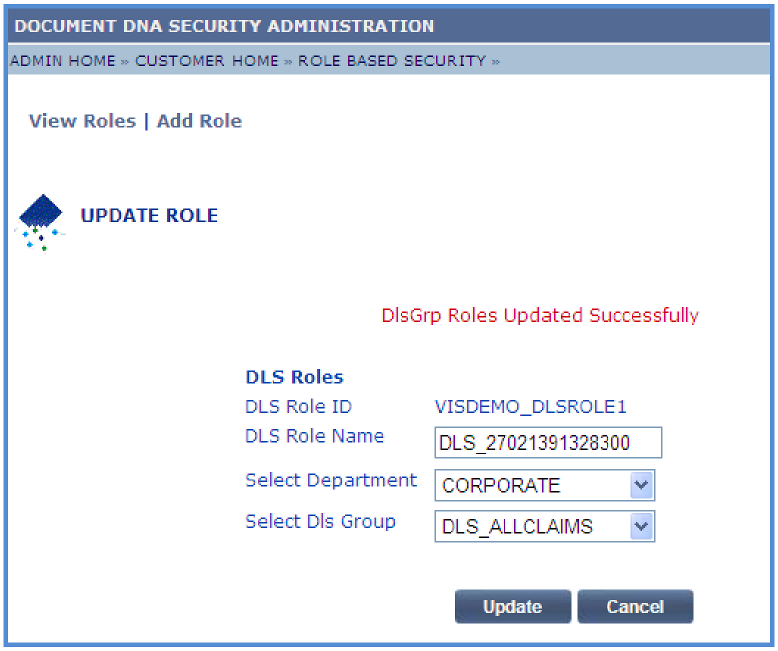
DLS Role ID VISDEMO_DLSROLE1

DLS Role Name DLS_27021391328300

Select Department CORPORATE

Select Dls Group DLS_2702139132830(

3. The **DLS Role ID**, **DLS Role Name**, **Select Department** and **Select Dls Group** fields will be auto populated for the selected Role ID.
4. Edit the **Select Dls Group.**
5. Click on the **Update** button.
6. The '**DlsGrp Roles updated Successfully**' message appears as shown below.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
UPDATE ROLE
Update
Cancel

DlsGrp Roles Updated Successfully

DLS Roles

DLS Role ID VISDEMO_DLSROLE1

DLS Role Name DLS_27021391328300

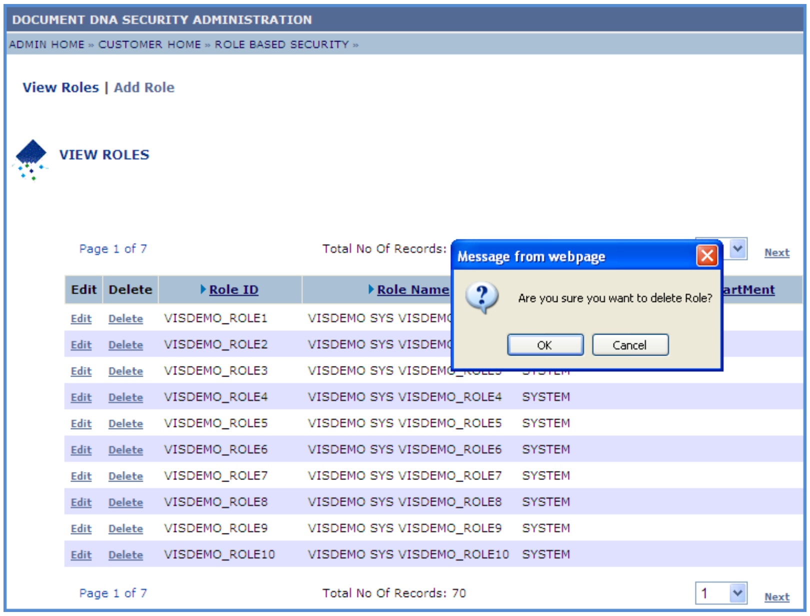
Select Department CORPORATE

Select Dls Group DLS_ALLCLAIMS

## Delete Role

Use the **Delete Role** functionality to completely remove an existing user from the system.

1. Click on the **Delete** link for the required Role ID that requires to be deleted.
2. The user will find the **Delete the selected role** dialog box.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

VIEW ROLES

Page 1 of 7 Total No Of Records: Next

Message from webpage

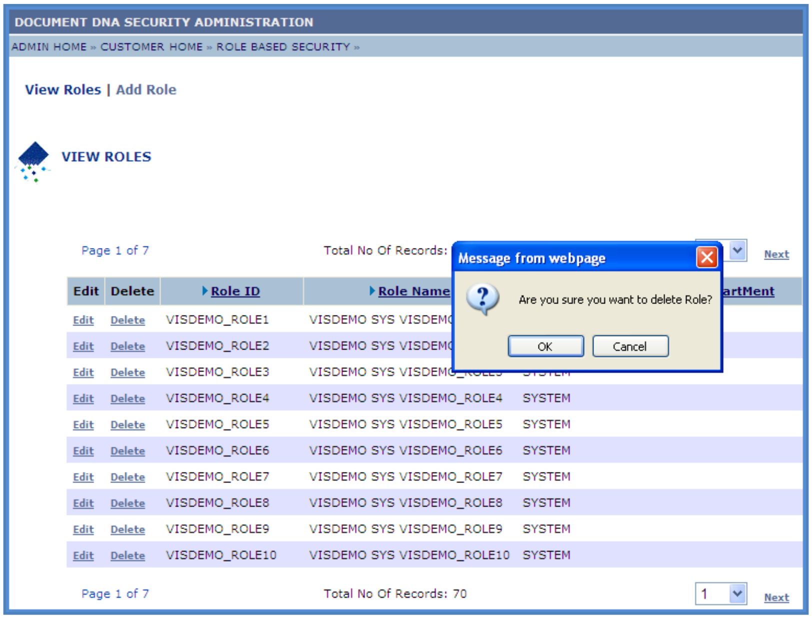
Are you sure you want to delete Role?

OK Cancel

| Edit | Delete | Role ID | Role Name | artMent |
|---|---|---|---|---|
| Edit | Delete | VISDEMO_ROLE1 | VISDEMO SYS VISDEMO | |
| Edit | Delete | VISDEMO_ROLE2 | VISDEMO SYS VISDEMO | |
| Edit | Delete | VISDEMO_ROLE3 | VISDEMO SYS VISDEMO | |
| Edit | Delete | VISDEMO_ROLE4 | VISDEMO SYS VISDEMO_ROLE4 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE5 | VISDEMO SYS VISDEMO_ROLE5 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE6 | VISDEMO SYS VISDEMO_ROLE6 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE7 | VISDEMO SYS VISDEMO_ROLE7 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE8 | VISDEMO SYS VISDEMO_ROLE8 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE9 | VISDEMO SYS VISDEMO_ROLE9 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE10 | VISDEMO SYS VISDEMO_ROLE10 | SYSTEM |

Page 1 of 7 Total No Of Records: 70 1 Next

3. Click on the **OK** button.
4. Click on the **Cancel** button to cancel the action.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

VIEW ROLES

Page 1 of 7 Total No Of Records: Next

Message from webpage

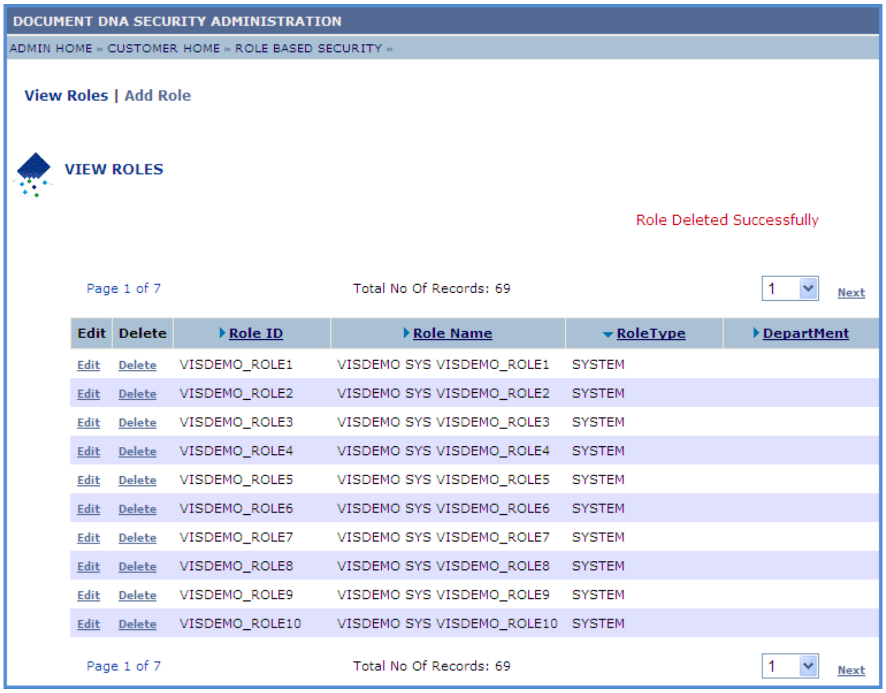
Are you sure you want to delete Role?

OK Cancel

| Edit | Delete | Role ID | Role Name | artMent |
|---|---|---|---|---|
| Edit | Delete | VISDEMO_ROLE1 | VISDEMO SYS VISDEMO | |
| Edit | Delete | VISDEMO_ROLE2 | VISDEMO SYS VISDEMO | |
| Edit | Delete | VISDEMO_ROLE3 | VISDEMO SYS VISDEMO | |
| Edit | Delete | VISDEMO_ROLE4 | VISDEMO SYS VISDEMO_ROLE4 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE5 | VISDEMO SYS VISDEMO_ROLE5 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE6 | VISDEMO SYS VISDEMO_ROLE6 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE7 | VISDEMO SYS VISDEMO_ROLE7 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE8 | VISDEMO SYS VISDEMO_ROLE8 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE9 | VISDEMO SYS VISDEMO_ROLE9 | SYSTEM |
| Edit | Delete | VISDEMO_ROLE10 | VISDEMO SYS VISDEMO_ROLE10 | SYSTEM |

Page 1 of 7 Total No Of Records: 70 1 Next

5. The '**Role Deleted Successfully**' message appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
VIEW ROLES

Role Deleted Successfully

Page 1 of 7 Total No Of Records: 69 1 Next

| Edit | Delete | Role ID | Role Name | RoleType | DepartMent |
|---|---|---|---|---|---|
| Edit | Delete | VISDEMO_ROLE1 | VISDEMO SYS VISDEMO_ROLE1 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE2 | VISDEMO SYS VISDEMO_ROLE2 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE3 | VISDEMO SYS VISDEMO_ROLE3 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE4 | VISDEMO SYS VISDEMO_ROLE4 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE5 | VISDEMO SYS VISDEMO_ROLE5 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE6 | VISDEMO SYS VISDEMO_ROLE6 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE7 | VISDEMO SYS VISDEMO_ROLE7 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE8 | VISDEMO SYS VISDEMO_ROLE8 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE9 | VISDEMO SYS VISDEMO_ROLE9 | SYSTEM | |
| Edit | Delete | VISDEMO_ROLE10 | VISDEMO SYS VISDEMO_ROLE10 | SYSTEM | |

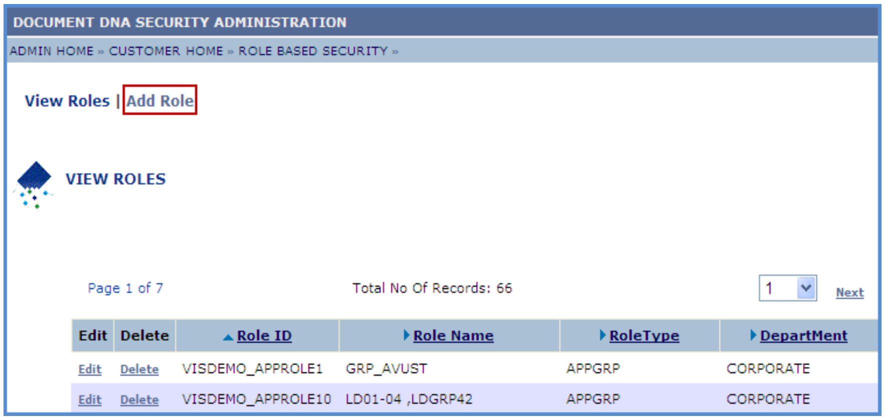
Page 1 of 7 Total No Of Records: 69 1 Next

## 4.3.2. Add New Role

The **Add New Role** functionality enables to create any of the following role type for the user.

- System Roles
- App GRP  Roles
- App DLS Roles

1. Click on the **Add Role** link.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

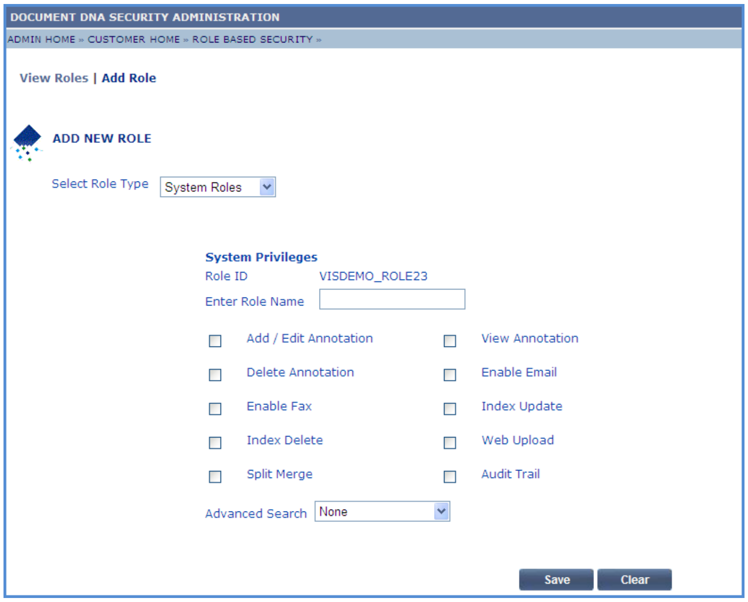
View Roles | Add Role

VIEW ROLES

Page 1 of 7 Total No Of Records: 66 1 Next

| Edit | Delete | Role ID | Role Name | RoleType | DepartMent |
|---|---|---|---|---|---|
| Edit | Delete | VISDEMO_APPROLE1 | GRP_AVUST | APPGRP | CORPORATE |
| Edit | Delete | VISDEMO_APPROLE10 | LD01-04 ,LDGRP42 | APPGRP | CORPORATE |

2. The **Add Role** page appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

ADD NEW ROLE

Select Role Type System Roles

System Privileges

Role ID VISDEMO_ROLE23

Enter Role Name

□ Add / Edit Annotation □ View Annotation

□ Delete Annotation □ Enable Email

□ Enable Fax □ Index Update

□ Index Delete □ Web Upload

□ Split Merge □ Audit Trail

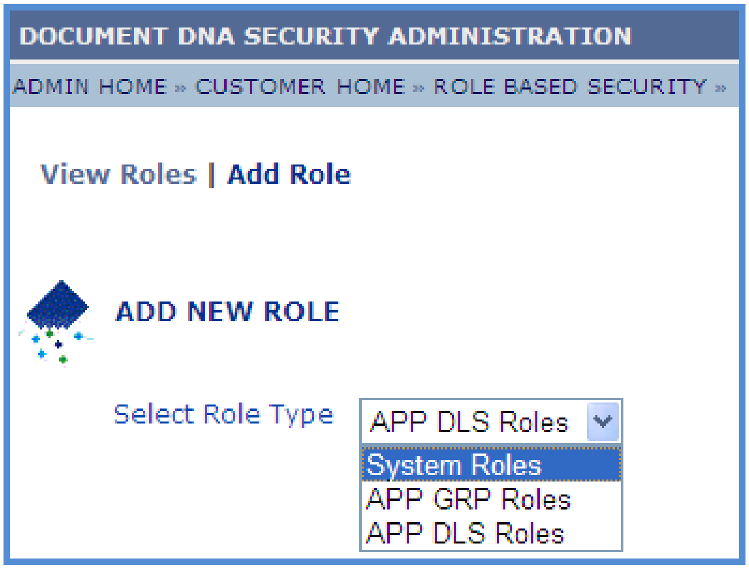
Advanced Search None

Save Clear

3. Select the Role Type from the **Select Role Type** drop-down list.

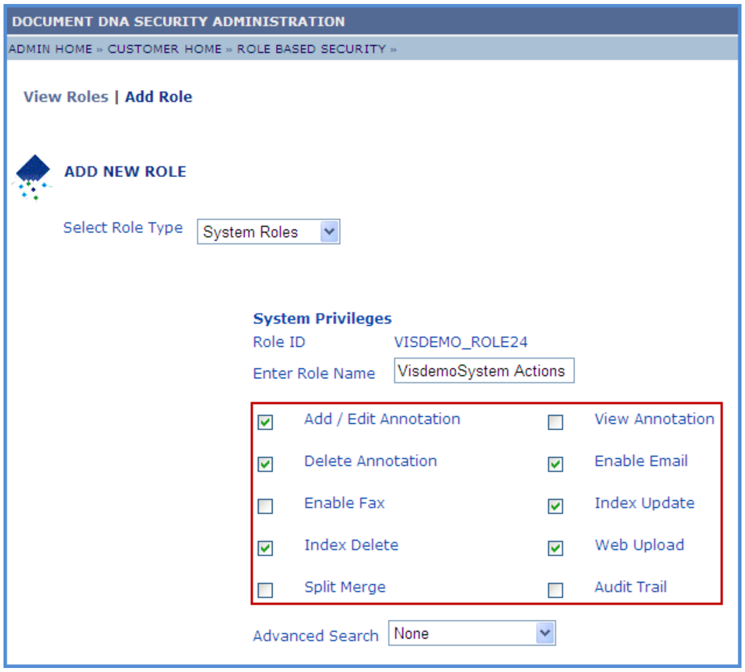
## System Roles

1. The System Roles consists of the **Role ID** and the **Role Name**.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
ADD NEW ROLE
System Roles
APP GRP Roles
APP DLS Roles

Select Role Type: APP DLS Roles

2. The **Role ID** will be automatically updated.
3. Enter the **Role Name**.
4. Check the **System Privileges**.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
ADD NEW ROLE

Select Role Type: System Roles

System Privileges

Role ID: VISDEMO_ROLE24

Enter Role Name: VisdemoSystem Actions

|  |  |
|---|---|
| ☑ Add / Edit Annotation | □ View Annotation |
| ☑ Delete Annotation | ☑ Enable Email |
| □ Enable Fax | ☑ Index Update |
| ☑ Index Delete | ☑ Web Upload |
| □ Split Merge | □ Audit Trail |

Advanced Search: None

5. According to the above image, the checked boxes indicate the user privileges in the documentdna site. The unchecked boxes indicate the privileges that the user must not have to access the site.

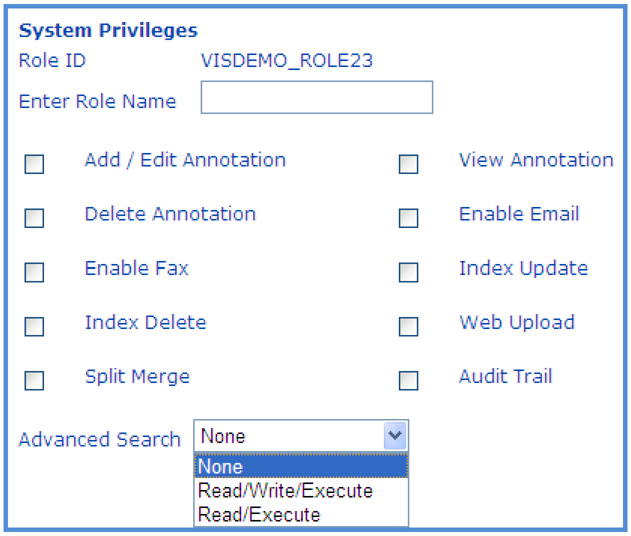
**Checked Boxes:**

- Add/Edit - The user can add/edit the documents in the documentdna site.
- Delete – The user can delete the document.
- Enable Email - The user can utilize the email feature in the documentdna site.
- Index Update – The user can update the index in the documentdna site.
- Index Delete - The user can delete the Index in the documentdna site.
- Web Upload – The user can access the web upload in the documentdna site.

**Unchecked Boxes:**

- View - The user cannot view the documents in the documentdna site.
- Enable Fax – The user cannot enable the fax features in the documentdna site.
- Split Merge - The user cannot view the split merge option in the documentdna site.
- Audit Trail – The user cannot view the Audit Trail link in the documentdna site.

6. The **Advanced Search** enables the user to create **Read/Write** or **Read/Write/Execute** or **None** system privileges for the role.



**System Privileges**

Role ID VISDEMO_ROLE23

Enter Role Name

□ Add / Edit Annotation □ View Annotation

□ Delete Annotation □ Enable Email

□ Enable Fax □ Index Update

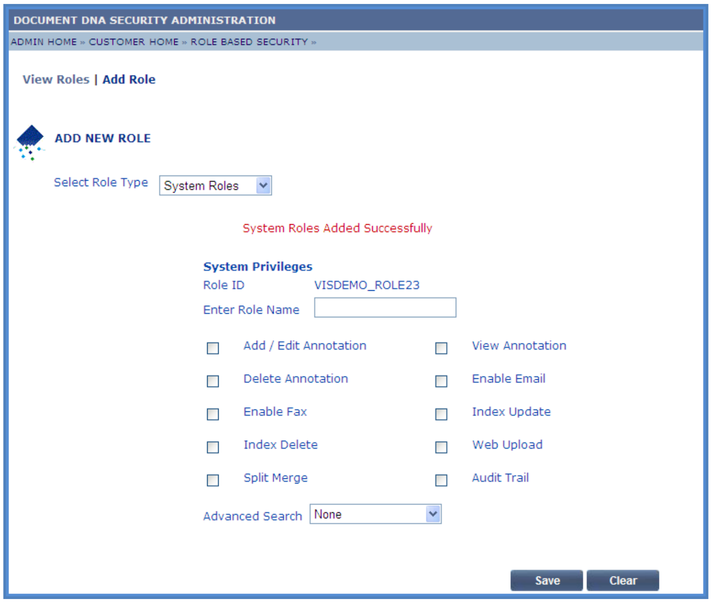
□ Index Delete □ Web Upload

□ Split Merge □ Audit Trail

Advanced Search: None

7. Click on the **Save** button to add the new role.

8. The '**System Roles Added Successfully**' message appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

ADD NEW ROLE

Select Role Type: System Roles

System Roles Added Successfully

System Privileges

Role ID: VISDEMO_ROLE23

Enter Role Name:

□ Add / Edit Annotation □ View Annotation

□ Delete Annotation □ Enable Email

□ Enable Fax □ Index Update

□ Index Delete □ Web Upload

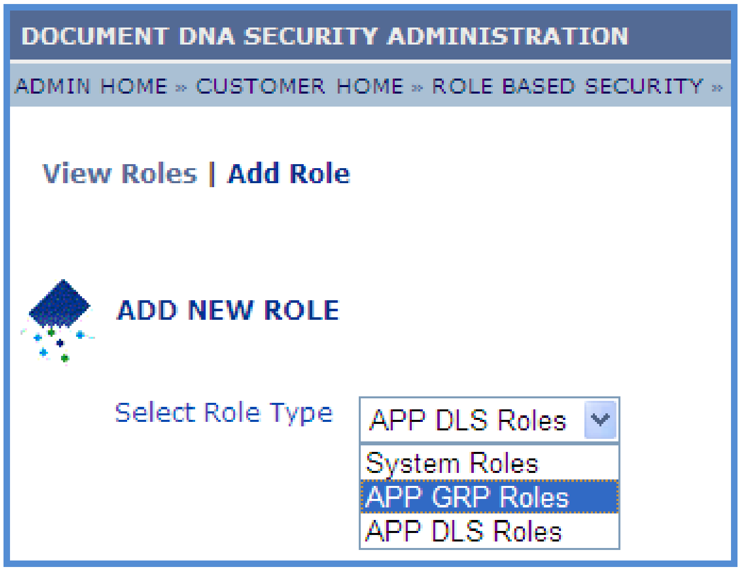
□ Split Merge □ Audit Trail

Advanced Search: None

9. Click on the **Clear** button to clear the values.

## APP GRP Roles

1. The APP GRP Roles consists of the **GRP Role ID**, **GRP Role Name**, **Select Department** and **Available Application Groups**.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

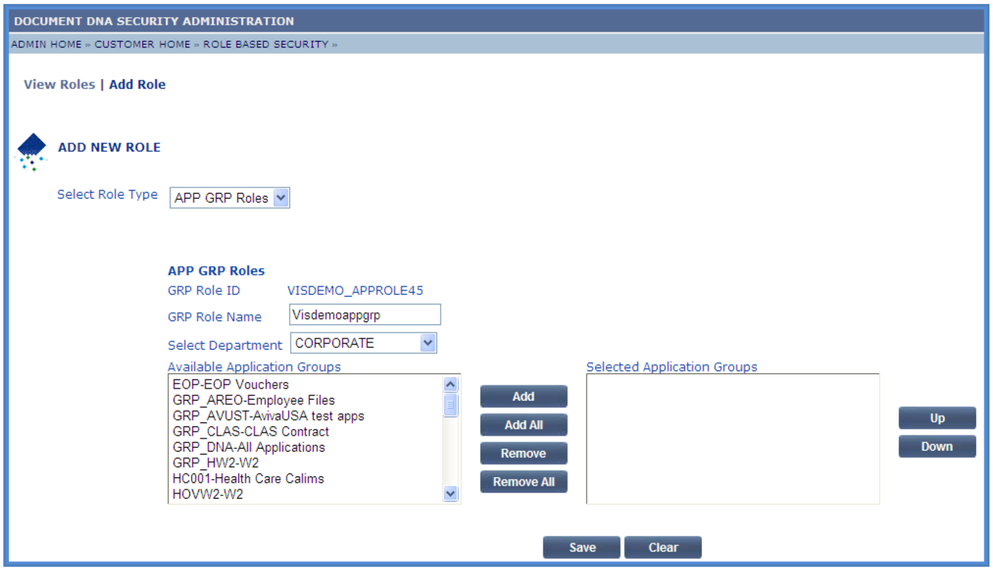
View Roles | Add Role

ADD NEW ROLE

Select Role Type: APP DLS Roles

2. The GRP **Role ID** will be automatically updated.

3. Enter the GRP **Role Name** and select the **Department**.
4. The application groups that are available will be listed under **Available Application Groups**.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
ADD NEW ROLE
Add
Add All
Remove
Remove All
Up
Down
Save
Clear

Select Role Type: APP GRP Roles

APP GRP Roles
GRP Role ID: VISDEMO_APPROLE45
GRP Role Name: Visdemoappgrp
Select Department: CORPORATE

Available Application Groups
EOP-EOP Vouchers
GRP_AREO-Employee Files
GRP_AVUST-AvivaUSA test apps
GRP_CLAS-CLAS Contract
GRP_DNA-All Applications
GRP_HW2-W2
HC001-Health Care Calims
HOVW2-W2

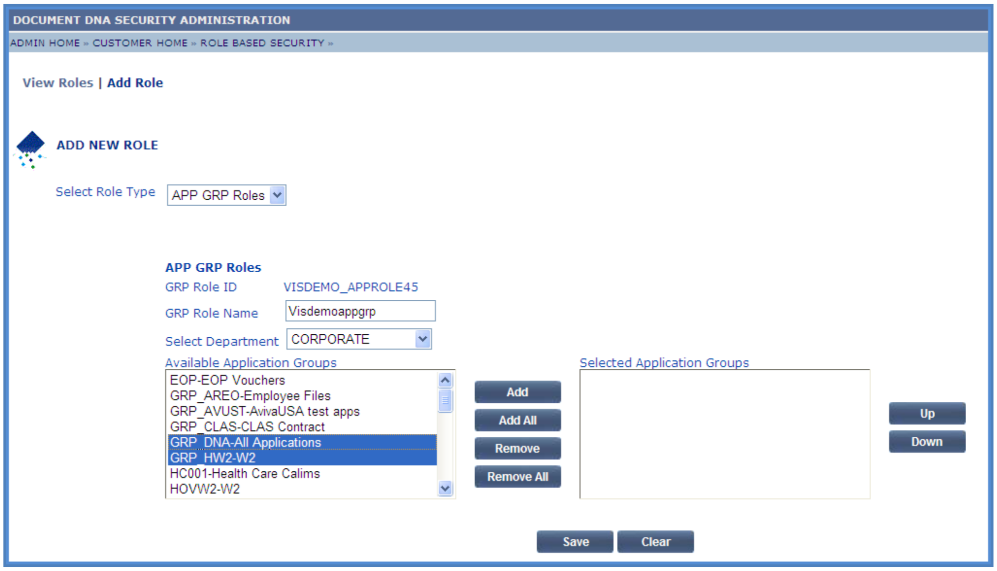
Selected Application Groups

5. Choose the appropriate group or groups for the user being created.

🗁 **Note:** Hold the Ctrl key allows selecting more than one group at a time.

6. Click on the **Add** button.

🗁 **Note:** Contact the document DNA Help Desk or a Corporate Administrator if the desired department is not available.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
ADD NEW ROLE
Add
Add All
Remove
Remove All
Up
Down
Save
Clear

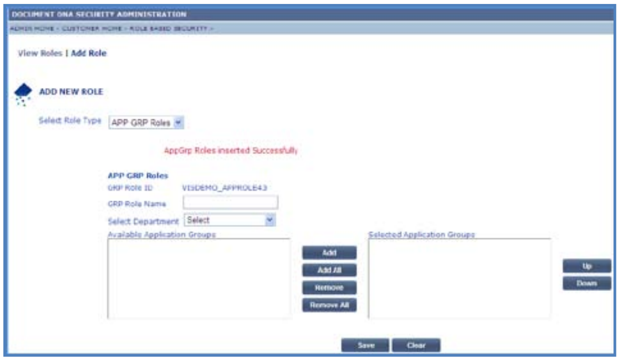
Select Role Type: APP GRP Roles

APP GRP Roles
GRP Role ID: VISDEMO_APPROLE45
GRP Role Name: Visdemoappgrp
Select Department: CORPORATE

Available Application Groups
EOP-EOP Vouchers
GRP_AREO-Employee Files
GRP_AVUST-AvivaUSA test apps
GRP_CLAS-CLAS Contract
GRP_DNA-All Applications
GRP_HW2-W2
HC001-Health Care Calims
HOVW2-W2

Selected Application Groups

7. The customer administrator also has the options to add all the groups, remove a group or all groups using the **Add All**, **Remove**, and **Remove All** for the **Selected Application Groups** respectively.
8. The customer administrator also has the ability to adjust the order in which the applications will appear for the user by using the **UP** and **DOWN** buttons to the right of the **Selected Application Groups** list.
9. Click on the **Save** button.
10. The '**AppGrp Roles inserted Successfully**' message appears as shown below.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

ADD NEW ROLE

Select Role Type: APP GRP Roles

AppGrp Roles inserted Successfully

APP GRP Roles

GRP Role ID: VISDEMO_APPROLE43

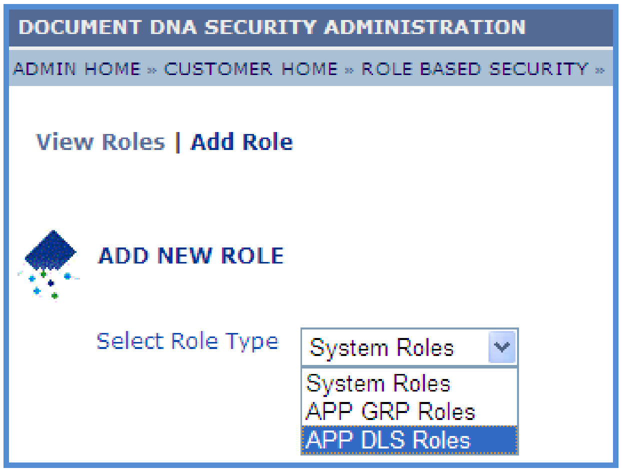
GRP Role Name:

Select Department: Select

11. Click on the **Clear** button to clear the values.

### APP DLS Roles

1. The **DLS Roles** consists of the **DLSRole ID**, **DLSRole Name**, **Select Department** and **Select DLS Groups**.



DOCUMENT DNA SECURITY ADMINISTRATION

ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »

View Roles | Add Role

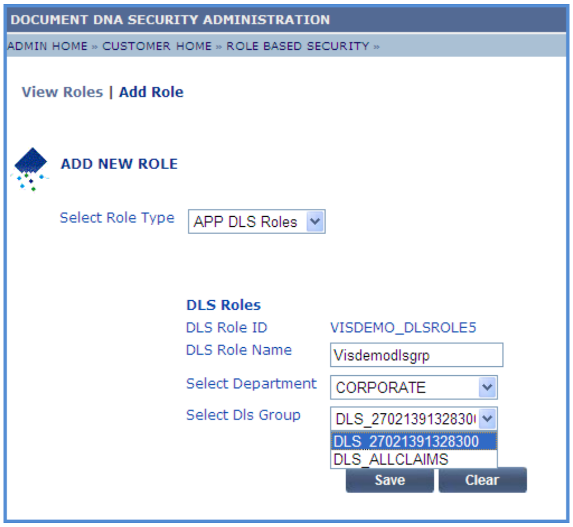
ADD NEW ROLE

Select Role Type: System Roles

2. The **DLSRole ID** will be automatically updated.
3. Enter the **DLSRole Name**.
4. Select the **Department**.

**Note:** When the department is selected, its corresponding Dls Group will be displayed in **Select Dls** Group.

5. Select the **DLS group** from the list.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
ADD NEW ROLE
Save
Clear

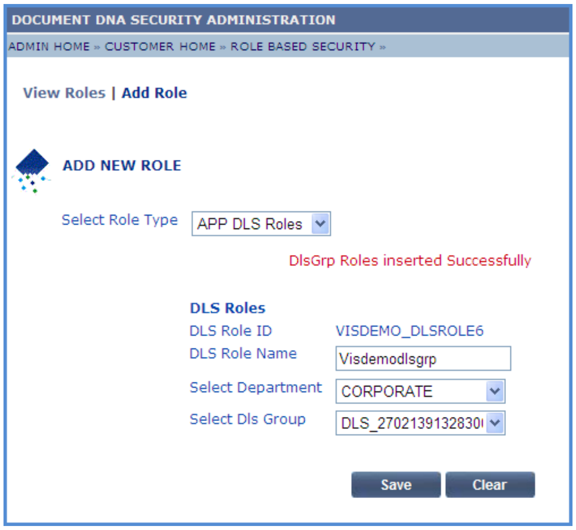
Select Role Type: APP DLS Roles

DLS Roles

| | |
|---|---|
| DLS Role ID | VISDEMO_DLSROLE5 |
| DLS Role Name | Visdemodlsgrp |
| Select Department | CORPORATE |
| Select Dls Group | DLS_2702139132830 |

DLS_27021391328300
DLS_ALLCLAIMS

6. Click on the **Save** button.
7. The '**DlsGrp Roles inserted Successfully**' appears as shown below.


DOCUMENT DNA SECURITY ADMINISTRATION
ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »
View Roles | Add Role
ADD NEW ROLE
Save
Clear

Select Role Type: APP DLS Roles

DlsGrp Roles inserted Successfully

DLS Roles

| | |
|---|---|
| DLS Role ID | VISDEMO_DLSROLE6 |
| DLS Role Name | Visdemodlsgrp |
| Select Department | CORPORATE |
| Select Dls Group | DLS_2702139132830 |

8. Click on the **Clear** button to clear the values.