

Results that Exceed Expectations



System Administration Manual





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1. Overview

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

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.

documentDNATM 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 documentDNATM 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 n	ames and file names.
1	1		1	

ICO	ICON KEY		
*	Phone		
	Mail		
	Notes		
X	Tips		
Δ	Warning		
\leftrightarrow	URL and Path		

1.3. Contact and Support

Address	SourceHOV, LLC
	3232 McKinney Avenue
	Suite 1000
	Dallas, Texas 75204
	(888) 339-4462
Compliance (Consumer Disputes)	🖀 : Toll Free 1.800.497.9527
	⊠ : info@hovservices.com
Corporate Website	$\leftrightarrow: \underline{http://www.sourcehov.com}$



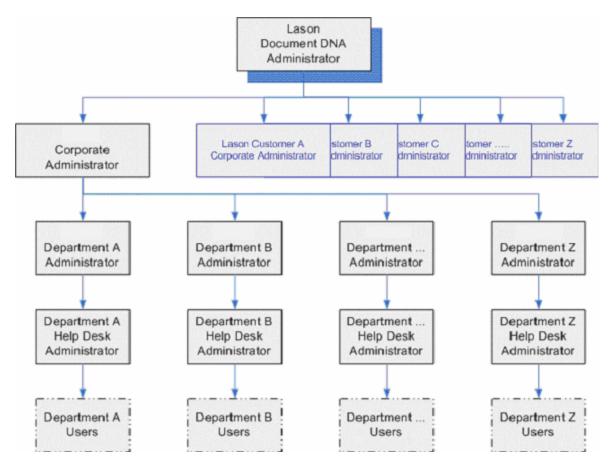


2. Security Administration Structure

documentDNATM 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 DNATM security administration hierarchy consists of 4 levels:

- Lason documentDNATM Administrator
- Corporate Administrator
- Departmental Administrator
- Help Desk Administrator







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 DNATM website is configured to meet the organizational needs of each individual customer.

There is a single website for all Departments that have documents in documentDNATM. 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	٣	
Add/Remove Department Admins	C	®
Add/Remove Help Desk Admins	Ð	C
Document Level Security (DLS) Group Management	٢	©
Add/Remove Users	٩	٩
Generate User Reports	٩	٩
Generate User Activity Reports	٩	Ð
Change/Unlock User Passwords	٢	٩





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		
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.



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 documentDNATM Security Administration, you can click on the **Log Out** button on the left pane of any screen.

- 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 ADM	INISTRATION	
~ 2	ADMIN HOME » CUSTOMER HOME		
C.			
ocument DNA			DocumentDNA VISDEMO Administration
VISDEMO			
Users		This is the demo customer.	
User Reports			
User Activity Report			
Roles			
DLS Groups			
LOV DLS Groups			
Application Groups			
Applications			
Topics			
Document Servers			
DRM rules			
Policy Information			
Delayed Download			
Admin Manual			
Log Out			

- 2. The User's page consists of two options namely Search Users and Add New User.
- C Note: The Search Users page is the default page.

	DOCUMENT DNA	SECURI	Y ADMINISTRATION				
\$ 2			- USER ADMINISTRATION	1.0			
ocument DNA	Search Users	Add No	uu Usos				
VISDEMO			ew User				
	SEARCH	USERS					
Users				~			Search
User Reports		Searc	h By User ID		ke M (Use le	ading or trailing * for wild ca	
User Activity Report							
Roles		Update	User Copy User	Unlock User Delete	User		
DL \$ Groups		Page	L of 6	Total No	Of Records: 120		1 Mext
LOV DL \$ Groups		Select	<u>▲ User ID</u>	First Name	Last Name	Email ID	User Type
Application Groups		0	ascoury	Teny	c		5-Corporate Admin
UI Application Group		0	acoury	Tony	c		5-Corporate Admin
Applications		0	allfeatures	Document DNA	Generic user	Lason-	5-Corporate Admin
Topics		-		Ashok		Helpdesk@lason.com	0-User
Document Servers		0	amollin-srcp				
DRM rules		0	a-nayak	Atanu	Nayak	atanu.nayak@hovservices.com	
Policy information		0	arora	Satpal Singh	Arora	sarora@lason.com	0-User
Delayed Download		0	asims	Anthony	Sims		0-User
Admin Manual		0	avivausanew	Aviva	USA		0-User
Log Out		0	bgibson	Brian	Gibson	brian.gibson@hovservices.com	0-User
		0	bgibsonweb	Brian	Gibson		3-Department Admin
		0	bhosale	Sourabh	Shosale	sbhosale@lason.com	0-User
		0	cardinho	Leo	Cardinho	lcardinho@lason.com	0-User
		0	cfrancisco	Cres	Francisco		5-Corporate Admin
		0	clas	CLAS	CLAS		0-User
		0	deve			srameswaran@lason.com	0-User
		0	dfarrell	DeAnn	Farrell		3-Department Admin
		0	dnatest	DNA	DNA	lason- helpdesk@lason.com	5-Corporate Admin
		0	dnatesti	DNA	DNA	lason- helpdesk@lason.com	5-Corporate Admin
		0	dnatest2	DNA	DNA	lason- helpdesk@lason.com	5-Corporate Admin
		0	dnaupload	DocDNA	DecDNA		3-Department Admin
		Page	L of 6	Total No	Of Records: 120		1 Y Next





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 -	
273		
	Search Users Add New User	
AVAYA	SEARCH USERS	
Users		
User Reports	Search By User ID Vike V *	search Reset
User Activity Report		annig - for wild card)
Roles	Update User Copy User Unlock User Delete User	
DLS Groups	Page 1 of 4 Total No Of Records: 64	1 Next

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.
- The user's information such as the User ID, First Name, Last Name, Email ID, User Type appears.





- 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 »
1 C 🐔	
document DNA	Search Users Add New User
VISDEMO	SEARCH USERS
Users	
User Reports	Search By User ID 🔽 Is 🔽 docdna Search Reset
User Activity Report	Update User Copy User Unlock User Delete User
Roles	Select <u>User ID</u> First Name Last Name <u>User Type</u>
DLS Groups	
LOV DLS Groups	

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.

	DOCUMENT DNA SECURITY ADMIN	NISTRATION						
	ADMIN HOME - CUSTOMER HOME - I	JSER ADMINISTRATION »						
7 1 1								
document DNA	Search Users Add New Use	r						
VISDEMO	UPDATE USER DOCDNA							
Users								
User Reports	User ID	de este e			First Name			1
User Activity Report	Password	docdna			Middle Initial	Document DNA		
Roles	Confirm Passwo	•••••						
DLS Groups					Last Name	Generic user		
DL'S Groups	User Type	User	*		Email ID	help.desk@hovs	services.com	
LOV DLS Groups	Select Departm	ent CORPORATE	*		Phone Number]
Delayed Download	Show Worklist	YES	~		Login Expires	NEVER	Change To	NEVER EXPIRES
Admin Manual	LOV Group	GRP_SUPER V	VIEW		Password Expires in	0		Days
					Force Change Password	O Yes ⊙ No		
Log Out								
	Select System F	VISDEMO SYS VISI	DEMO_ROLE1	16 💌 See Details	1			
	Select AppGrp F	Cole: GRP_AREO ,LDGF	RP42 ,LD_XML		*			
		EVEL SECURITY ASSI			Comments			~
	Below are all ap N/A means DLS	plications available to the is not enabled for that ap	user. oplication.					
	Application I	d 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					
				Update	Cancel			





 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					
User ID	docdna				
Password	•••••				
Confirm Password	•••••				
User Type	User 👻				
Select Department	User Help-Desk Admin				
Show Worklist	Directconnect User				
LOV Group	Department Admin Corporate Admin				

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

	DOCUMENT DNA SECURITY ADMINIST	RATION						
	ADMIN HOME - CUSTOMER HOME - USER	ADMINISTRATION -						
200								
document DNA	Search Users Add New User							
VISDEMO	UPDATE USER DOCDNA							
Users	11 C							
User Reports	User ID	docdna			First Name	Document D	NA	1
User Activity Report	Password				Middle Initial	Coccarrience of		1
Roles	Confirm Password		-		Last Name	Generic user		1
DLS Groups	User Type	User	~		Email ID		ovservices.com	1
LOV DLS Groups	Select Department	CORPORATE			Phone Number	(maip.orgen.org)	ovaci ricea.com	
	Show Worklist				Login Expires	-	-	
Delayed Download		YES	×.		and the second sec	NEVER	Change To	NEVER EXPIRES
Admin Manual	LOV Group	GRP_SUPER	WIEW		Password Expires in	0		Days
Log Out					Force Change Password	O Yes O No		
	Select System Role	VISDEMO SYS VISD						
	Select AppGrp Role:			See Details	200			
	Select Apport Koles	GRP_ARE0 .LDGR	P42 LD_XML		*			
	DOCUMENT LEVE	L SECURITY ASSIG	NMENTS		Comments	1		~
	Below are all applica	tions available to the	user.					
	N/A means DLS is n	ot enabled for that ap	plication					
	Application Id	Application Name	DLS Roles					-
	AREOOL	Employee Files	N/A					
	EOP01	EOP Vouchers	N/A					
	HIMOL	Patient Records	11/A					
	LDO1	Explanation of Benefits	N/A					
	LD02	Invoices	N/A					
	LD03	Bank Reports	N/A					
	LD 0-4	Claims	N/A					
	LDOS	Proof of Delivery	N/A					
	LDXML	Explanation of Benefits XML	14/A					
				Update	Cancel			





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 ADMINIST	RATION					
2	ADMIN HOME - CU	STOMER HOME - USER	ADMINISTRATION -					
document DNA	Search Users	Add New User						
VISDEMO		USER DOCDNA						
Users		ODER DOCDART						
User Reports								
		User ID	docdna			First Name	Document DNA	
User Activity Report		Password				Middle Initial		
Roles		Confirm Password	•••••			Last Name	Generic user	
DLS Groups		User Type	User	~		Email ID	help.desk@hovservices.com	
LOV DLS Groups		Select Department	CORPORATE	~		Phone Number		
Delayed Download		Show Worklist	YES	~		Login Expires	NEVER Change To	NEVER EXPIRES
Admin Manual		LOV Group	GRP_SUPER V	VIEW		Password Expires in	0	Days
			GRP_BILL			Force Change Password	O Yes ⊙ No	
Log Out			GRP_SUPER					
		Select System Role	VISDEMO SYS VISD	EMO_ROLE1	16 🔽 See Details			
		Select AppGrp Role:	GRP_AREO ,LDGRI	P42 ,LD_XML		*		
		DOCUMENT	L SECURITY ASSIG			Comments		
		Below are all applica	ations available to the ot enabled for that app	user.		Comments		<u>~</u>
		Application Id	Application Name	DLS Roles				~
		AREO01	Employee Files	N/A				
		EOP01 HIM01	EOP Vouchers Patient Records	N/A N/A				
			Explanation of					
		LD01	Benefits	N/A				
		LD02	Invoices	N/A				
		LD03	Bank Reports	N/A				
		LD04	Claims	N/A				
		LD05	Proof of Delivery Explanation of	N/A				
		LDXML	Benefits XML	N/A				
					Update	Cancel		

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 Grou	IP: GRP_BILL			
S.No	List Of Values			
Topic ID: DNA_DO	остур			
1	BILLING			
2	CONTRACT			
3	TERMINATION			

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

	DOCUMENT DNA SECURITY ADMINISTRATION					
	ADMIN HOME - CUSTOMER HOME - USER A	DMINISTRATION »				
7 1						
document DNA	Search Users Add New User					
VISDEMO	· •					
	UPDATE USER DOCDNA					
Users	**					
User Reports						
	User ID	docdna		First Name	Document DNA	1
User Activity Report	Password			Middle Initial		1
Roles	Confirm Password			Last Name		
		•••••			Generic user	
DLS Groups	User Type	User 🗸		Email ID	help.desk@hovservices.com	
LOV DLS Groups	Select Department	CORPORATE 🗸		Phone Number]
Delayed Download	Show Worklist	YES		Login Expires	NEVER Change To	NEVER EXPIRES
Admin Manual	LOV Group	GRP_SUPER VIEW		Password Expires in	0	Days
				Force Change Password	O Yes ⊙ No	
Log Out					0 103 0 110	
	Select System Role	VISDEMO SYS VISDEMO_ROLE16	See Details			
	Select AppGrp Role:	Select	OCC Details	~		
		VISDEMO SYS VISDEMO_ROLE1				
	DOCUMENT LEVEL	VISDEMO SYS VISDEMO_ROLE2 VISDEMO SYS VISDEMO_ROLE3		Comments		1000
		VISDEMO SYS VISDEMO_ROLE4		Commenta		
	Below are all applicati N/A means DLS is not	VISDEMO SYS VISDEMO_ROLE5 VISDEMO SYS VISDEMO_ROLE6				
		VISDEMO SYS VISDEMO_ROLE7				
	Application Id	VISDEMO SYS VISDEMO_ROLE8 VISDEMO SYS VISDEMO_ROLE9				~
	AREO01 E	VISDEMO SYS VISDEMO_ROLE10				
	EOP01 E	VISDEMO SYS VISDEMO_ROLE11				
	HIM01 F	VISDEMO SYS VISDEMO_ROLE12 VISDEMO SYS VISDEMO_ROLE13				
	-	VISDEMO SYS VISDEMO_ROLE14				
	LD01	VISDEMO SYS VISDEMO_ROLE15 VISDEMO SYS VISDEMO ROLE16				
		VISDEMO SYS VISDEMO_ROLE17				
	LD03 E	VISDEMO SYS VISDEMO_ROLE18 VISDEMO SYS VISDEMO_ROLE19				
	LD04 C	VISDEMO SYS VISDEMO_ROLE20				
		VISDEMO SYS VISDEMO_ROLE21 VISDEMO SYS VISDEMO ROLE22				
	LOVU E	implanation of N/A	I			
			Update	Cancel		

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 💟 See Details	
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.

DOCUMENT DNA SECURITY ADMINIST	Select	^			
	All Corp Apps				
ADMIN HOME » CUSTOMER HOME » USER AD	AllBut2Apps				
	AllBut4Apps				
	EOP				
Search Users Add New User	EOP, GRP CLAS, GRP DNA, GRP HW2				
	EOP ,GRP CLAS ,GRP DNA ,GRP HW2 ,HC001				
ADD NEW USER	EOP ,GRP DNA				
ADD NEW USER	EOP ,GRP DNA ,HC001				
1 A A	EOP ,GRP DNA ,HOVW2				
	GRP_AREO				
	GRP_AREO ,GRP_DNA ,LD_GRP3				_
User ID	GRP_AREO ,LDGRP42 ,LD_XML		1e		
Password	GRP_AVUST		itial		_
Password	GRP_CLAS		lual		
Confirm Password	GRP_CLAS ,GRP_DNA ,HC001 ,HOVW2 ,LASI02 ,LD_CLAIMS		he		_
Commin Password	GRP_DNA				
User Type	GRP_DNA ,LDGRP42				
	GRP DNA LD GRP4				
Select Department	GRP HW2 HC001		umber		
	HC001 ,LD01GRP ,LD02-05 ,LD03GRP				
Show Worklist	HOVW2		pires	NEVER vill expire o	n NEVER EXPIRES
	LASI01			win expire o	in ineventext inco
LOV Group	LASI02		d Expires in	0	Davs
	LD01-04 ,LD02-05				
	LD01-04 ,LDGRP42		ange Password	⊙ Yes ○ No	
	LD01GRP				
	LD03GRP				
Select System Role					
	LDGRP42	_			
Select AppGrp Role:	LDGRP42 ,LD_XML	~			
			*		
	Comr	nen	ts		~
					<u> </u>
	Add Reset				
	Aud				

14. When selecting a AppGRP Role, 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	DLS_27021391328300 DLS_ALLCLAIMS
LD01	Explanation of Benefits	Visdemodlsgrp Test VISDEMO DLS
LD04	Claims	DLS_27021391328300 🗸

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 Force Change Password	0 ○ Yes ⊙ No		NEVER EXPIRES 1 DAY 2 DAYS 3 DAYS 7 DAYS 14 DAYS 30 DAYS 60 DAYS
Comments			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.
- 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.

	ACMIN HOME - CUSTOMER HOME - USER ADMINISTRATION -									
	ADMIN HOME = 0	USTOMER HOM	E = USER ADMIN	ISTRATION =						
223										
cument DNA	Search Use	s Add New	Upor							
at she on on the placet have	Jearch Use	is [hou new	Crister,							
VISDEMO	SEARC	HUSERS								
	100	and the second second								
sers.	•••									
		Search By	User ID	~	ls	2	docdna		Search	Reset
		Search By	User ID	*	ls	2	docdna		Search	Reset
ser Reports		Search By	User ID	v	ls	2	docdna		Search	Reset
ser Reports	.,			V		HORE .	docdna		Search	Reset
ser Reports	.,	Update Use	er Copy User] Unlock User	Delete Us	ser	Le contrain d'anne disse			
ier Reports ier Activity Report				(Delete Us	ser	docdna Nams	+ Email ID		Reset

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

COPA	USER					
	User ID Password Confirm Password User Type Belict Ocpartment Bhow Worklist LOV Group Belict System Role	User CORPORATE YES GRP_SUPER V	I M I M MIEM	First Name Middle Initial Last Name Email ID Phone Number Login Expires Password Expires in Force Change Password	Occument DNA Generic user help.desk@hovservices.com NEVER will expire on [6] 0 0 © Yes © No 0	EVER EXPIRES
	Select AppGrp Role:	VISDEMO SYS VISD GRP_CLAS_GRP_E	EMO_ROLE16 M	CLAIMS		
	Select AppGrp Role: DOCUMENT LEVE Below are all applice N/A means DLS is m	GRP_CLAS.GRP_E	NA HC001 HOVW2 LABIO2 LC NMENTS user, plication.	Comments		
	Select AppGrp Role: DOCUMENT LEVE Below are all applice N/A means DLS is n Application Id	GRP_CLAS_GRP_E GRP_CLAS_GRP_E L SECURITY ASSIG trions available to the ot enabled for that app Application Name	NNA HCOO1 HOVW2 LASIO2 LC NMENTS bication. DLS Roles	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	Select AppGrp Role: DOCUMENT LEVE Below are all applice N/A means DLS is m	GRP_CLAS.GRP_E	NA HC001 HOVW2 LABIO2 LC NMENTS user, plication.	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	Select AppGrp Role: DOCUMENT LEVE Below are all applica N/A means DLS is in Application Id CLASD1	GRP_CLAS_GRP_E L SECURITY ASSIG trions available to the ot enabled for that app Application Name CLAS Centract	NNA, HC001, HOVW2, LASIO2, LC NMENTS User, plication. DLS Roles DLS_27021301328300 ()	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	Select AppGrp Role: DOCUMENT LEVE Below are all application N/A means DLS is no Application 1d CLASO1 DNA01	GRP_CLAS.GRP_E L SECURITY ASSIG triens available to the otenabled for that app Application Name CLAS Centract Customer Records	NNA. HC001, HOVW2 LASI02 LC NMENTS USE*, DLS. Roles DLS_27021301328300 V DLS_27021301328300 V	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	Select AppGrp Role: DOCUMENT LEVE NA means DLS is no Application Id CLS01 DNA01 HOVW2	GRP_CLAS.GRP_C & SECURITY ASSIG tions available to the to enabled for that app Application Name CLAS Contract Customer Records W2	NNA HC001 HOWW2 LASIO2 LC NMENTS USER, DLS Roles DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391328300 DLS_27021391391328300 DLS_2702139128200 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270213912800 DLS_270210000000000000000000000000000000000	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		

- 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.

DMIN HOME » CU	ISTOMER H	HOME = USER ADMIN	IISTRATION »				
Search Users	i Add No	ew User					
	USER						
••						User inserted Successfull	lv
	Search	By User ID	*	s 🗸	docdna		earch Reset
	Update	User Copy Use	r Unlock User De	lete User			
	Select	▲ <u>User ID</u>	First Name	Last M	Name	Email ID	User Type
	0	docdna	Document DNA	Generic us	er	help.desk@hovservices.com	0-User

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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.
- 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 SECURI	TY ADMINISTRATI	ON				
200							
Anter and Traded with Mickel Parket Access	Search Users Add N	ew User					
VISDEMO	SEARCH USERS						
Users	Service oberto						
Users							
User Reports	Search	By User ID	✓ Is	 docdna 	Se	arch	Reset
User Activity Report							
User Activity Report	Update	User Copy User	Unlock User Delet	e User			
Roles	Select	Uses ID	b Einst Name	A Look Norrow	k Causil TD	A Use	
DLS Groups	Select	▲ <u>User ID</u>	First Name	Last Name	Email ID	▶ <u>Use</u>	er Type
DES Groups	۲	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 SECURITY ADMINISTRATION
	ADMIN HOME - CUSTOMER HOME - USER ADMINISTRATION -
25	
Second Frederic All with Back, Balance Assess	Search Users Add New User
VISDEMO	SEARCH USERS
Users	
User Reports	Search By User ID 🔽 Is 🔽 docdna Search Reset
User Activity Report	Update User Copy User Unlock User Delete User
Roles	Select Juser I Reset User Password
DLS Groups	Ø docdna Enter a new password and click the Reset Password button to reset password for this user.
LOV DLS Groups	New Password:
Delayed Download	ResetPassword Cancel
Admin Manual	
Log Out	

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

DOCUMENT DN	A SECURI	TY ADMINISTRATI	DN							
ADMIN HOME - CL	ADMIN HOME = CUSTOMER HOME = USER ADMINISTRATION =									
Search Users	Add N I USERS									
					User unlocked Successfully					
	Search	By User ID	✓ Is	 docdna 	Sea	Reset				
	Update	User Copy User	Unlock User Delet	e User						
	Select	▲ <u>User ID</u>	First Name	Last Name	Email ID	User Type				
	۲	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.
- 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 SECURITY	ADMINISTRATIC	DN					
	ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »							
sereas as I reduct only with Disits Estimate Research	Search Users Add New	User						
VISDEMO	SEARCH USERS							
Users	SEARCH USERS							
User Reports	Search By	User ID	⊻ Is	 docdna 	Sea	arch Reset		
User Activity Report	Update Use	r Copy User	Unlock User Delet	e User				
	Select	▲ <u>User ID</u>	First Name	Last Name	Email ID	User Type		
DLS Groups	⊙ do	:dna	Document DNA	Generic user	help.desk@hovservices.com	0-User		

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- 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	SECUR	ITY ADMINISTRATI	DN	
ADMIN HOME » CU	STOMER	HOME - USER ADMINIS	STRATION »	
Search Users	· · · ·		v	Is v docdna Search Reset
	Update	User Copy User	Unlock User De	Message from webpage
	Select	<u>User ID</u>	First Name	User Type
	۲	docdna	Document DNA	Are you sure you want to delete the selected user?
				OK Cancel

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

DOCUMENT DNA SECURITY ADM	INISTRATION									
ADMIN HOME » CUSTOMER HOME » US	ADMIN HOME » CUSTOMER HOME » USER ADMINISTRATION »									
Search Users Add New User										
_	ser ID 💌 Like	*	or trailing * for wild card)	Search Reset						
Update User C	Copy User Unlock User Delete	e User								
Page 1 of 6	Total No	Of Records: 116		1 💌 Next						
Select 🔺 🛽	Iser 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 SEC	JRITY ADMINISTRAT	ION					
	ADMIN HOME » CUSTOM	ER HOME - USER ADMIN	ISTRATION »					
U.S.								
document DNA	Search Users Add	l New User						
AVAYA	SEARCH USE	PS .						
Users	SEARCH USE							
		rch By User ID	V Lik	·• • •		Search	Reset	
User Reports	Sea	Search By User ID Like Like Search Reset (Use leading or trailing * for wild card)						
User Activity Report								
Roles	Upda	te User Copy User	Unlock User Dele	te User				
DLS Groups								
DLS Groups	Pag	je 1 of 4	Total I	No Of Records: 64		1 ¥ Next		
LOV DLS Groups	Sele	ct <u>Vser ID</u>	First Name	Last Name	Email ID	User Type		
Application Groups								
UI Application Group	0	AP1	Pune	AP1	dbhatkande@avaya.com	0-User		
or Application Group	0	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**.
- 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 ADMINIST	RATION				
ADMIN HOME » CUSTOMER HOME » USER AD	DMINISTRATION »				
Search Users Add New User					
User ID			First Name Middle Initial]
Password Confirm Password			Middle Initial Last Name]
User Type	User 🗸		Email ID]
Select Department	CORPORATE 💌		Phone Number]
Show Worklist	YES		Login Expires	NEVER 💌 will expire on	NEVER EXPIRES
LOV Group	GRP_BILL Y		Password Expires in	0	Days
			Force Change Password	⊙ Yes ◯ No	
Select System Role Select AppGrp Role:	Select	~	~		
			Comments		
					\sim
		Add	Reset		
		Auu	Reset		

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

DOCUMENT DNA SECURITY ADMINIST	TRATION			
DMIN HOME - CUSTOMER HOME - USER A	DMINISTRATION -			
Search Users Add New User				
ADD NEW USER				
		User Inserted Successfully		
User ID		First Name		1
Password		Middle Initial		1
Confirm Password		Last Name]
User Type	User 💌	Email ID		1
Select Department Show Worklist	CORPORATE	Phone Number		
LOV Group	YES	Login Expires Password Expires in		NEVER EXPIRES
LOV GIOUP	GRP_BILL YIEW	Force Change Password	© Yes ⊖ No	Days
Select System Role	Select	See Details		
Select AppGrp Role:	Select	×		
		Comments		
				5
		Add Reset		
		And Reath		





EBPP Customers

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

- 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.

DOCUM	DOCUMENT DNA SECURITY ADMINISTRATION							
ADMIN H	ADMIN HOME - CUSTOMER HOME - USER ADMINISTRATION -							
Sear	ch Users	Add New User						
*	ADD NE	W 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 V	VIEW		Password Expires in	0	Days
						Force Change Password	⊙ Yes ○ No	
		Select System Role	WHOLEFOODS SY	S WHOLEFO		e Details		
		Select AppGrp Role:	GRP_WFS 💌					
		DOCUMENT LEVEL	SECURITY ASSIG	MENTS		Comments		
		Below are all applica N/A means DLS is no	ations available to th ot enabled for that a	e user. oplication.				
		Application Id	Application Name	DLS Roles				~
		WFS01	e-Paystubs	N/A				·,
		WFS02	Compensation	N/A				
		Enable EBPP User T	vpe 🗖					
			🔲					
					Add	Reset		

- 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.





OCUMENT DNA SE	CURITY ADMINISTRAT				
	R HOME - USER ADMINISTRA				
Search Users A	dd New User				
•					
ADD NEW	USER				
•					
U	Jser ID	test9		First Name	test
F	Password	•••••		Middle Initial	
c	Confirm Password	•••••		Last Name	test
	Jser Type			Email ID	
		Use shutterstock_8744839 Authority shutterstock_5667133			
S	elect Department	CC dreamstimefree_542639		Phone Number	
s	how Worklist	YE shutterstock_4954483 shutterstock_6289513		Login Expires	NEVER will expire on NEVER EXPIR
	OV Group	dreamstimefree_1163101		Password Expires in	
		GR shutterstock_7628425 shutterstock_6959548		-	0 Days
		shutterstock_5728777		Force Change Password	⊙ Yes © No
		shutterstock_6864805 shutterstock_9107788			
S	elect System Role	WH shutterstock_6701362	DS_ROLE2	See Details	
s	elect AppGrp Role:	GR shutterstock_6203485 shutterstock_5533327			
		Pionic Basket			
	OCUMENT LEVEL S	SECU shutterstock_5061238 shutterstock_5515003		Comments	
	alow are all applicat	ions shutterstock_8739855			
N N	V/A means DLS is no	t en shutterstock_0000410			
		shutterstock_8200588 shutterstock_5053888			
	Application Id	shutterstock_8325829			
		-Pays shutterstock_7180284 shutterstock_5548144			
	WFS02 C	shutterstock_8534224			
		shutterstock_4916326 shutterstock_6345487			
E	Enable EBPP User Ty	pe shutterstock_6270640			
E	BPP User Type	Girl playing with the waves shutterstock_8000284			
s	ecurity Image	dreamstimefree_542639			
		dreamstimetree_042030]		
			and the second		
			A REAL PROPERTY		
		and the second			
			a state of the sta		
I	mage Caption				
-	2 · · · · · · · · ·				
			Add	Reset	

- 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
VISDEMO		
Users	This is the demo customer.	
User Reports		
User Activity Report		
Roles		
DLS Groups		
LOV DLS Groups		
Application Groups		
Applications		
Topics		
Document Servers		
DRM rules		
Policy Information		
Delayed Download		
Admin Manual		
Log Out		

2. The Role's page consists of two options namely - <u>View Roles</u> and <u>Add Role</u>.

➢ Note: The View Roles page is the default page.

	DOCUMENT DNA SECURITY ADMINISTRATION							
	ADMIN I	ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »						
	View		l Add Ro					
document DNA	view	Roles	Auu Ku	ле				
VISDEMO								
Users		VIEW	ROLES					
User Reports								
User Activity Report		Pag	e 1 of 7		Total No Of Records: 66		1 V Newt	
Roles							Next	
DLS Groups		Edit	Delete	▲ <u>Role ID</u>	Role Name	▶ <u>RoleType</u>	DepartMent	
LOV DLS Groups		Edit	<u>Delete</u>	VISDEMO_APPROLE1	GRP_AVUST	APPGRP	CORPORATE	
		Edit	<u>Delete</u>	VISDEMO_APPROLE10	LD01-04 ,LDGRP42	APPGRP	CORPORATE	
Delayed Download		Edit	<u>Delete</u>	VISDEMO_APPROLE11	All Corp Apps	APPGRP	CORPORATE	
Admin Manual		Edit	<u>Delete</u>	VISDEMO_APPROLE12	GRP_CLAS	APPGRP	CORPORATE	
Log Out		Edit	<u>Delete</u>	VISDEMO_APPROLE13	GRP_DNA	APPGRP	CORPORATE	
		Edit	<u>Delete</u>	VISDEMO_APPROLE14	GRP_AREO ,LDGRP42 ,LD_XML	APPGRP	CORPORATE	
		Edit	<u>Delete</u>	VISDEMO_APPROLE15	LD_GRP3	APPGRP	CORPORATE	
		Edit	Delete	VISDEMO_APPROLE16	LD_GRP4	APPGRP	CORPORATE	
		Edit	<u>Delete</u>	VISDEMO_APPROLE17	LDGRP42 ,LD_XML	APPGRP	CORPORATE	
		Edit	<u>Delete</u>	VISDEMO_APPROLE18	LD01-04,LD02-05	APPGRP	CORPORATE	
		Pag	e 1 of 7		Total No Of Records: 66		1 <u>v</u> <u>Next</u>	





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 IDMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »									
View I	View Roles Add Role									
•	VIEW ROLES									
	Pag	e 1 of 7		Total No Of Records: 70		1 V Next				
	Edit	Delete	Role ID	▶ <u>Role Name</u>	▼ <u>RoleType</u>	▶ <u>DepartMent</u>				
	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					
	<u>Edit</u>	Delete	VISDEMO_ROLE6	VISDEMO SYS VISDEMO_ROLE6	SYSTEM					
	<u>Edit</u>	Delete	VISDEMO_ROLE7	VISDEMO SYS VISDEMO_ROLE7	SYSTEM					
	Edit	Delete	VISDEMO_ROLE8	VISDEMO SYS VISDEMO_ROLE8	SYSTEM					
	<u>Edit</u>	Delete	VISDEMO_ROLE9	VISDEMO SYS VISDEMO_ROLE9	SYSTEM					
	<u>Edit</u>	Delete	VISDEMO_ROLE10	VISDEMO SYS VISDEMO_ROLE10	SYSTEM					
	Pag	e 1 of 7		Total No Of Records: 70		1 V 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 » ROLI	E BASED SECURITY	25				
View Roles Add Role						
	ystem Privileges ole ID	VISDEMO_ROLE1				
E	nter Role Name	VISDEMO SYS VISE	DEMC			
	Add / Edit A	nnotation	✓	View Annotation		
	Delete Anno	otation	✓	Enable Email		
	Enable Fax			Index Update		
C	Index Delet	e	✓	Web Upload		
C	Split Merge			Audit Trail		
A	dvanced Search	None	*			
				Update Cancel		

- 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 » RO	DLE BASED SECURITY	35				
View Roles Add Role						
	System Privileges Role ID	VISDEMO_ROLE1				
	Enter Role Name	VISDEMO SYS VISI	DEMC			
	Encer Note Name		2			
	🗌 🛛 Add / Edit A	Innotation	~	View Annotation		
	Delete Anno	otation		Enable Email		
	Enable Fax		~	Index Update		
	Index Delet	te	~	Web Upload		
	Split Merge		V	Audit Trail		
	Advanced Search	Read/Write/Execute	~			
				Update Cancel		





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						
	System Roles Updated Successf	ully				
Role	System Privileges Role ID VISDEMO_ROLE1 Enter Role Name VISDEMO SYS VISDEMC					
V	Add / Edit Annotation	>	View Annotation			
V	Delete Annotation		Enable Email			
	Enable Fax		Index Update			
	Index Delete	V	Web Upload			
	Split Merge	V	Audit Trail			
Adv	anced Search None	*				
			Update Cancel			

AppGRP Role

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

DOCUMENT DNA SECURITY ADMINISTRATION DMIN HOME - CUSTOMER HOME - ROLE BASED SECURITY - View Roles Add Role									
VIEW ROLES									
	Page 1 of 7 Total No Of Records: 70								
	Edit	Delete	Role ID	<u>Role Name</u>	▲ <u>RoleType</u>	DepartMent			
	Edit	Delete	VISDEMO_APPROLE1	GRP_AVUST	APPGRP	CORPORATE			
	<u>Edit</u>	<u>Delete</u>	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	e 1 of 7		Total No Of Records: 70		1 💌 Next			

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

DOCUMENT DNA SECUR	ITY ADMINISTRATIO	N				
DMIN HOME - CUSTOMER	HOME > ROLE BASED SE	CURITY -				
View Roles Add Rol	ie					
UPDATE ROLE						
	APP GRP Roles					
	GRP Role ID	VISDEMO_APPROLE	1			
	GRP Role Name	GRP_AVUST	0			
	Select Department	CORPORATE	*			
	Available Applicatio	n Groups			Selected Application Groups	
	EOP-EOP Vouchers		^	Add	GRP_AVUST-AwaUSA test apps	
	GRP_AREO-Employ GRP_CLAS-CLAS_C	vee riles Contract				Up
	GRP_DNA All Appli			Add All		
	GRP_HW2-W2 HC001-Health Care	Calima	-	Remove		Down
	HOVW2-W2			Remove All		
	LASI01-For Lason In	tranet	~			

- 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 SECUR ADMIN HOME - CUSTOMER	and the second state of the second state of the						
View Roles Add Ro	le						
UPDATE ROLE							
	APP GRP Roles GRP Role ID	VISDEMO_APPROL	.E1				
	GRP Role Name	GRP_AVUST					
	Select Department Available Applicatio		~		Selected Application	Groups	
	EOP-EOP Voucher GRP_AREO-Emplo GRP_CLAS-CLAS (HC001-Health Care HOVW2-W2 LASI01-For Lason Inter LASI02-Lason Inter LD01-04-CLAIMS G	s yee Files Contract Calims ntranet net - HR	(m) (Add Add All Remove Remove All	GRP_AVUST-AveaU GRP_DNA-All Apple GRP_HW2-W2	SA test apps	Up Down
				U	odate Cancel		

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- 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.
- 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 SEC	URITY ADMINISTRATI	ON			
DMIN HOME - CUSTON	RR HOME - ROLE BASED S	ECURITY -			
View Roles Add	Role				
	E				
	App	Grp Roles Updated Successful			
	APP GRP Roles				
	GRP Role ID	VISDEMO_APPROLE1			
	GRP Role Name	GRP_AVUST			
	Select Departmen	CORPORATE			
	Available Applicati		Selected App	alication Groups	
	EOP-EOP Vouche GRP_AREO-Empl HC001-Health Carr HOVW2-W2 LASI01-For Lason LASI02-Lason Intra LD01-04-CLAIMS (LD01GRP-LD01 O	rs oyee Files o Calimo Intranet inet - HR BROUP	GRP_AVUST	T-AnvaUSA test apps JI Applications	Up Down

DLS Roles

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

DOCUMENT DNA SECURITY ADMINISTRATION DMIN HOME = CUSTOMER HOME = ROLE BASED SECURITY =								
View Roles Add Role								
VIEW ROLES								
••								
	Pag	e 1 of 7		Total No Of Records: 70		1 <u>v</u> <u>Next</u>		
	Edit	Delete	Role ID	▲ Role Name	RoleType	▶ <u>DepartMent</u>		
	Edit	Delete	VISDEMO_APPROLE11	All Corp Apps	APPGRP	CORPORATE		
	Edit	Delete	VISDEMO_APPROLE40	AllBut2Apps	APPGRP	CORPORATE		
	Edit	Delete	VISDEMO_APPROLE9	AllBut4Apps	APPGRP	CORPORATE		
	Edit	<u>Delete</u>	VISDEMO_DLSROLE1	DLS_27021391328300	DLSGRP	CORPORATE		
	Edit	<u>Delete</u>	VISDEMO_DLSROLE2	DLS_ALLCLAIMS	DLSGRP	CORPORATE		
	Edit	<u>Delete</u>	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								

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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	ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »							
View Roles Add Role								
UPDATE ROLE								
	Roles							
	Role ID	VISDEMO_DLSROLE1						
DLS	Role Name	DLS_27021391328300						
Sele	ct Department	CORPORATE						
Sele	ct Dls Group	DLS_27021391328301						
		Update Cancel						

- 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 H	ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »							
View Roles Add Role								
UPDATE ROLE								
	DisG	p Roles Updated Successfully						
	DLS Roles							
	DLS Role ID	VISDEMO_DLSROLE1						
	DLS Role Name	DLS_27021391328300						
	Select Department	CORPORATE 🔽						
	Select Dls Group							
		Update Cancel						

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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 DMIN HOME - CUSTOMER HOME - ROLE BASED SECURITY -							
View I	View Roles Add Role							
ب	/IEW	ROLES						
	Pag	e 1 of 7		Total No Of Records:	Vessage	from webpage 👔 👔		Next
	Edit	Delete	Role ID	▶ <u>Role Name</u>	?	Are you sure you want to delete Role	, artM	<u>ent</u>
	Edit	Delete	VISDEMO_ROLE1	VISDEMO SYS VISDEMO	\checkmark			
	<u>Edit</u>	<u>Delete</u>	VISDEMO_ROLE2	VISDEMO SYS VISDEMO		OK Cancel		
	Edit	<u>Delete</u>	VISDEMO_ROLE3	VISDEMO SYS VISDEMO	NOLLO	010164		
	Edit	<u>Delete</u>	VISDEMO_ROLE4	VISDEMO SYS VISDEMO	ROLE4	SYSTEM		
	Edit	<u>Delete</u>	VISDEMO_ROLE5	VISDEMO SYS VISDEMO_	ROLE5	SYSTEM		
	<u>Edit</u>	<u>Delete</u>	VISDEMO_ROLE6	VISDEMO SYS VISDEMO_	ROLE6	SYSTEM		
	Edit	<u>Delete</u>	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		
	<u>Edit</u>	<u>Delete</u>	VISDEMO_ROLE10	VISDEMO SYS VISDEMO_	ROLE10	SYSTEM		
	Pag	e 1 of 7		Total No Of Records: 7(D	1	*	Next

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

	DOCUMENT DNA SECURITY ADMINISTRATION							
View	View Roles Add Role							
	VIEW ROLES							
	Pag	e 1 of 7		Total No Of Records:	essage	from webpage 🛛 🛛 🔀	`	Next
	Edit	Delete	Role ID	▶ <u>Role Name</u>	2	Are you sure you want to delete Role?	artM	<u>ent</u>
	Edit	Delete	VISDEMO_ROLE1	VISDEMO SYS VISDEMO	\checkmark			
	Edit	Delete	VISDEMO_ROLE2	VISDEMO SYS VISDEMO		OK Cancel		
	Edit	Delete	VISDEMO_ROLE3	VISDEMO SYS VISDEMC	(OLL)	JIJIEN .		
	Edit	Delete	VISDEMO_ROLE4	VISDEMO SYS VISDEMO_F	ROLE4	SYSTEM		
	Edit	<u>Delete</u>	VISDEMO_ROLE5	VISDEMO SYS VISDEMO_F	ROLE5	SYSTEM		
	Edit	Delete	VISDEMO_ROLE6	VISDEMO SYS VISDEMO_F	ROLE6	SYSTEM		
	Edit	Delete	VISDEMO_ROLE7	VISDEMO SYS VISDEMO_F	ROLE7	SYSTEM		
	Edit	Delete	VISDEMO_ROLE8	VISDEMO SYS VISDEMO_F	ROLE8	SYSTEM		
	Edit	<u>Delete</u>	VISDEMO_ROLE9	VISDEMO SYS VISDEMO_F	ROLE9	SYSTEM		
	Edit	<u>Delete</u>	VISDEMO_ROLE10	VISDEMO SYS VISDEMO_F	ROLE10	SYSTEM		
	Pag	e 1 of 7		Total No Of Records: 70		1	*	Next

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

DOCUME	DOCUMENT DNA SECURITY ADMINISTRATION								
ADMIN HO	ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »								
View F	View Roles Add Role								
۸ 📥									
1. Ale 1.									
					Role Deleted	I Successfully			
	Pag	e 1 of 7		Total No Of Records: 69		1 💌 <u>Next</u>			
	Edit	Delete	Role ID	Role Name	▼ <u>RoleType</u>	DepartMent			
	<u>Edit</u>	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				
	<u>Edit</u>	Delete	VISDEMO_ROLE10	VISDEMO SYS VISDEMO_ROLE10	SYSTEM				
	Pag	e 1 of 7		Total No Of Records: 69		1 V 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.

DOCUME	DOCUMENT DNA SECURITY ADMINISTRATION								
ADMIN HO	OME » (CUSTOME	R HOME » ROLE BASED SE	CURITY »					
View	View Roles Add Role								
<u>م</u>	VIEW ROLES								
	_								
	Page 1 of 7 Total No Of Records: 66								
	Edit	Delete	▲ <u>Role ID</u>	Role Name	RoleType	DepartMent			
	Edit	Delete	VISDEMO_APPROLE1	GRP_AVUST	APPGRP	CORPORATE			
	<u>Edit</u>	<u>Delete</u>	VISDEMO_APPROLE10	LD01-04 ,LDGRP42	APPGRP	CORPORATE			

2. The Add Role page appears as shown below.

DOCUMENT DNA SECURITY ADMINISTRATION								
ADMIN HOME » CUSTOMER HOME » F	ADMIN HOME » CUSTOMER HOME » ROLE BASED SECURITY »							
View Roles Add Role								
ADD NEW ROLE								
Select Role Type Syste	em Roles 💌							
	System Privile							
	Role ID Enter Role Nam	VISDEMO_ROLE2:	, 					
	Add / Ed	it Annotation		View Annotation				
	Delete A	nnotation		Enable Email				
	Enable F	ax		Index Update				
	🔲 🛛 Index De	elete		Web Upload				
	Split Mer	ge		Audit Trail				
	Advanced Searc	h None	~					
				Save Clear				

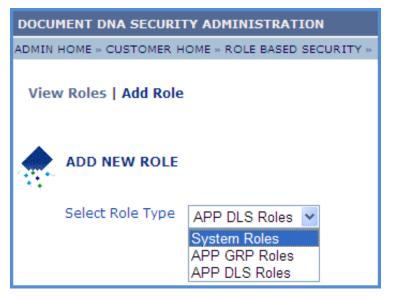
3. Select the Role Type from the **Select Role Type** drop-down list.





System Roles

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



- 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 Ac					
	Add / Edit Annotation		View Annotation			
	Delete Annotation	✓	Enable Email			
	Enable Fax	>	Index Update			
	✓ Index Delete	✓	Web Upload			
	Split Merge		Audit Trail			
	Advanced Search None	*				





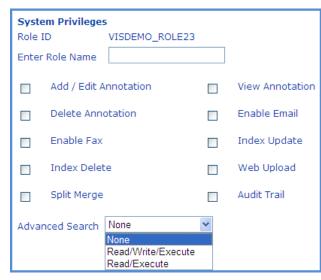
5. According to the above image, the checked boxes indicate the user privileges in the documentdna site. The unchecked boxes indicate the privileges that the user must not have to access the site.

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



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 » R	OLE BASED SEC	CURITY »				
View Roles Add Role						
Select Role Type Syste	Select Role Type System Roles					
	Syste	em Roles Added Su	cessfully			
	System Privileges Role ID VISDEMO_ROLE23					
	Enter Role N					
	Add ,	/ Edit Annotation		View Annotation		
	Delet	te Annotation		Enable Email		
	Enab	ole Fax		Index Update		
	Inde	x Delete		Web Upload		
	Split	Merge		Audit Trail		
	Advanced S	earch None	~			
				Save Clear		

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.



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	ADMIN HOME - CUSTOMER HOME - ROLE BASED SECURITY -					
Viev	View Roles Add Role					
	ADD NEW ROLE					
	Select Role Type	APP GRP Roles ¥				
		APP GRP Roles	VISDEMO APPROLE45			
		GRP Role Name	Visdemoappgrp]		
		Select Department	CORPORATE 🗠			
		Available Applicatio			Selected Application Groups	
		EOP-EOP Voucher: GRP_AREO-Emplo GRP_AVUST-Avival GRP_CLAS-CLAS (GRP_DNA-All Appli GRP_HW2-W2 HC001-Health Care HOVW2-W2	yee Files JSA test apps Contract cations	Add Add All Remove Remove All		Up Down
				S	ave Clear	

- 5. Choose the appropriate group or groups for the user being created.
- To Note: Hold the Ctrl key allows selecting more than one group at a time.
- 6. Click on the **Add** button.

 \bigcirc Note: Contact the document DNA Help Desk or a Corporate Administrator if the desired

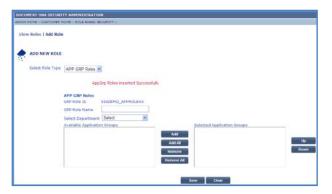
department is not available.

DOCUMENT DNA SECURITY ADMINISTRATION						
ADMIN	HOME - CUSTOMER H	IOME - ROLE BASED SE	CURITY »			
Vie	View Roles Add Role					
	ADD NEW ROLE					
	Select Role Type	APP GRP Roles ¥]			
		APP GRP Roles				
		GRP Role ID GRP Role Name	VISDEMO_APPROLE45 Visdemoappgrp]		
		Select Department	CORPORATE 💌			
		Available Application EOP-EOP Vouchers GRP_AREO-Employ GRP_CLAS-CLAS C GRP_DNA-All Applit GRP_HW2-W2 HC001-Health Care I HOVW2-W2	n Groups Ree Files ISA test apps Contract cations	Add Add All Remove Remove All	Selected Application Groups	Up Down
				s	ave Clear	





- 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.
- 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.



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.



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- 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 SE	CURITY »				
View Roles Add Role					
Select Role Type APP DLS Roles 🗸					
DLS Roles					
DLS Role ID	VISDEMO_DLSROLE5				
DLS Role Name	Visdemodlsgrp				
Select Department	CORPORATE 💌				
Select Dis Group	DLS_27021391328300 DLS_27021391328300 DLS_ALLCLAIMS Save Clear				

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



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