



# User Guide

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Version 5.1

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## 1 Introduction

### 1.1 What is document DNA?

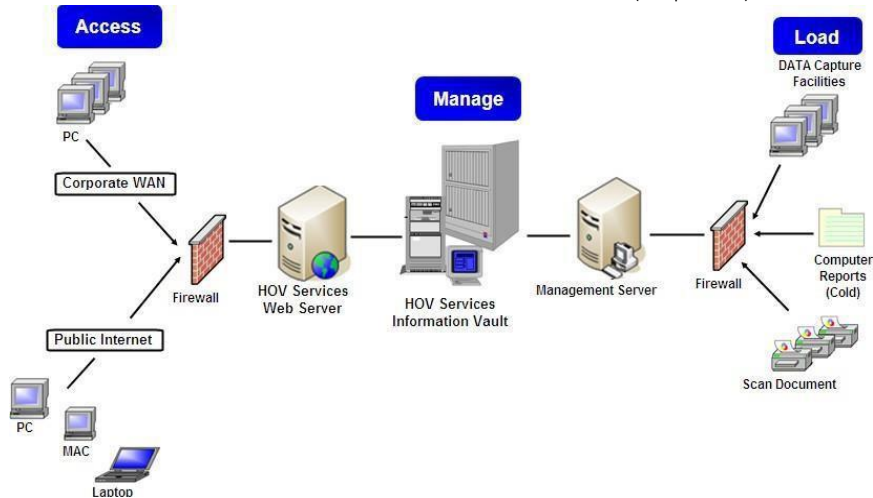
Developed by HOV Services, **document DNA** is an electronic solution for the storage, management and retrieval of large volumes of documents: scanned images or computer-generated text. It is designed to provide companies with value in three ways:

- A reliable filing system (no misfiles or lost documents)
- A secure, web-based document retrieval system
- A set of electronic tools for performing tasks on the documents (i.e., viewing, faxing, emailing, printing, and/or storing on local drives for later use)

### 1.2 How It Works

There are three stages to the **document DNA** process: Load, Manage and Access.

- Load: Loaded into the HOV Services Information Vault
- Manage: Organized into discrete and secure databases (one per client), tracked, and audited
- Access: Made accessible to user communities via customized web interfaces (one per client)



This manual, the **document DNA** User Guide, details the Access stage, how documents are organized and how to use the **document DNA** web interface to find, retrieve and manipulate documents.

## 2 Document Organization

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Document organization in [document DNA](#) is structured to provide a secure environment at several levels: Client, Report, Document (via Index Keys), and [User](#)

### 2.1 Clients

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The first level of document organization and security in [document DNA](#) is segregation of data by client. BCERS is provided a unique, password-protected FTP account for secure data transfers and a unique web interface for protected access to their documents.

### 2.2 Reports

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Documents are sorted by reports as a means of separating them into logical categories. The reports that are available for you to access are:

- Benefits
- Legacy
- Administration
- Accounting
- Human Resources
- Retirement Savings Plan

### 2.3 Index Keys

The main role of index keys is to find stored documents quickly. Index keys can also be used to categorize documents into sub-groups and may be used to limit access to one or more sub-groups.

For the most part, index keys are words, phrases, or numbers found on documents (e.g., SSN, Last Name, Pension Number, etc.). The sample below shows the index keys in the Benefits department. By specifying one or more of these values, users can locate a specific document quickly rather than obtaining a broad range of documents.

The Benefits report has been indexed with the following keys. To search for a key, fill in the search criteria and click on the Search button above

Wildcard can only be used as suffix. [ i.e. William\* and not \*William ]

Pension #	<input type="text"/>	
SSN	<input type="text"/>	
Last	<input type="text"/>	
First	<input type="text"/>	
DOB [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
Document Type	<input type="text"/>	
Sub Type	<input type="text"/>	
Effective Date [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
Scan Date [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
System Import Date [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
Source Type	<input type="text" value="FICHE"/>	
Processed By	<input type="text"/>	
Record Status	<input type="text"/>	
DCN	<input type="text"/>	
DOCID	<input type="text"/>	

### 2.4 Users

- There are (2) different types of users: Super User and Complete User. Each user group has restricted access to either one or more specific reports.
- The Superuser can web upload documents (the audit trail will show the user that initiated the web uploads) email and update indexes.
- The Complete User can view documents, print, create worklists, and export documents.

Note: help desk administrators (HDA) are permitted to unlock user accounts and reset passwords.

Benefits HDA: Adrian Brown, Angela Jackson, Adrian Jones, Stacy Brown, Jonathan Pearce, and Su Huang

### 3 Document DNA Web Interface

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Document organization and security are tied into the [document DNA](#) web interface design.

**BCERS Proprietary URL:**

- Document organization and security are tied into the document DNA web interface design.
- BCERS level security and site organization is created through a unique URL
- Production: ([https://dna1.documentdna.com/index.jsp?URL\\_CONTEXT=bcers](https://dna1.documentdna.com/index.jsp?URL_CONTEXT=bcers))



**Login Page**

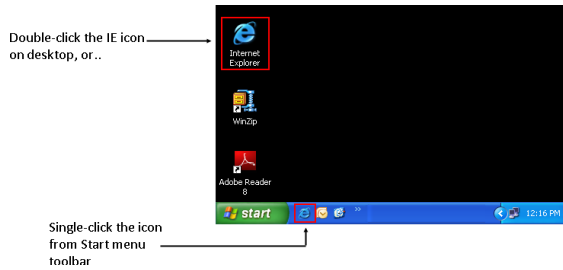
The login procedure serves two purposes:

- a. Validate users
- b. Prepare subsequent website page formats to reflect any access restrictions that apply to the user's profile

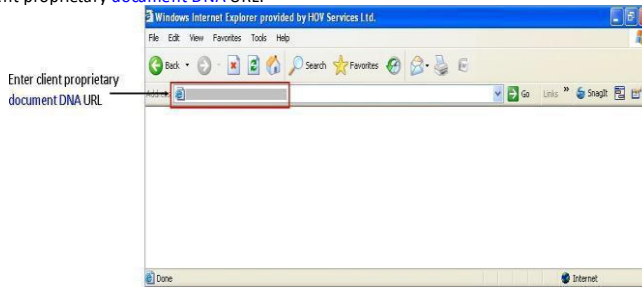


### 3.1 Login Procedure

Step 1: The document DNA module resides on the web and can be accessed through a browser such as Chrome



Step 2: Access client proprietary document DNA URL.



Step 3: Login


- a. Enter login ID
- b. Enter password
- c. Submit login for validation




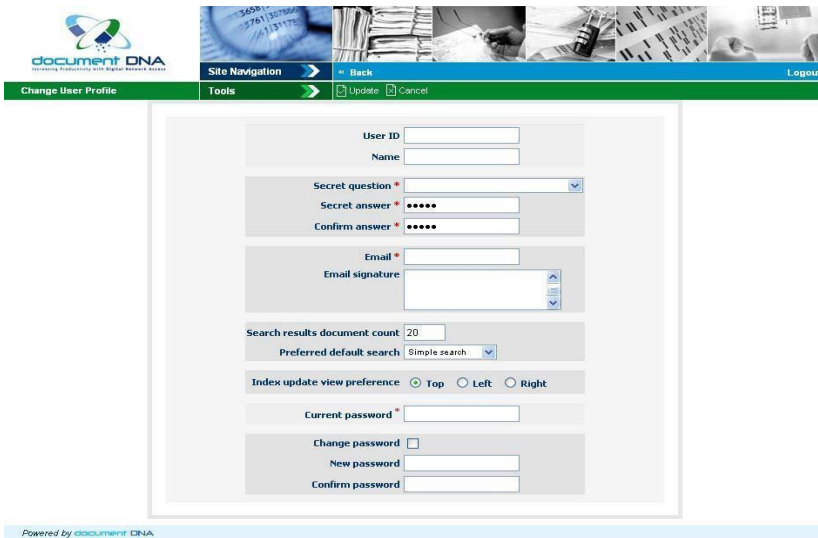
**Note:** The initial password value for all users is configured per the client's request. After successful login, the user will be prompted to change the temporary password to a confidential value before the system will grant access to the document DNA website.

**Note:** When the 'Keep me signed in' check box is indicated the system will not completely log the user out from the current session if idle too long. This option will take user back to the Report List page.

### 3.2 My Profile

Users may update the fields displayed to change their profile, by clicking the  link. This will retain the updated information.

Optional: Click the  link to remove user updates (only if used before clicking update).



**Note:** Secret question & secret answer must be completed to utilize the **Forgot your password?** Self-service password reset utility.



### 3.2.1 Mandatory Password Changes

The system forces a password change under two conditions:

- During the first login
- Every time a password expires

1. Select secret question  
 2. Enter secret answer  
 3. Enter confirm answer  
 4. Enter email address  
 5. Enter email signature (optional)  
 6. Enter temporary or expired password  
 7. Check box to change password  
 8. Enter new password  
 9. Enter new password again  
 10. Click update to finalize changes

Return to the Login Page

Powered by document DNA \* See your Application Administrator for password rules

To update:

**Note:** User ID and Name data can only be changed by an Administrator.

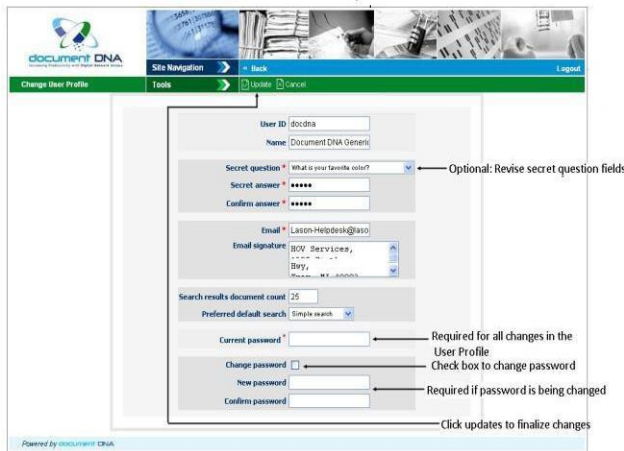
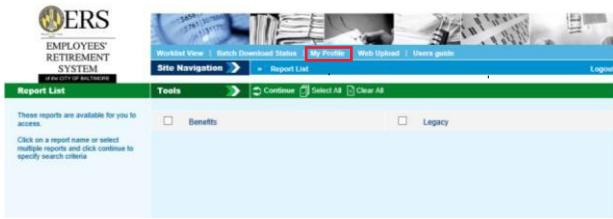
- Step 1: Select a **Secret question** from the drop-down list
- Step 2: Enter the **Secret answer** related to the secret question
- Step 3: Confirm the secret answer by reentering it in **Confirm answer** field
- Step 4: Enter **Email** address
- Step 5: Enter **Email signature** (optional)
- Step 6: Enter temporary or expired password in **Current password** field
- Step 7: Enter **New password**
- Step 8: Confirm the password by reentering it in **Confirm password** field
- Step 9: Click on **Update** to finalize the changes

The Notification window informs the user when the changes have been completed. Users must acknowledge the notification before the system can proceed to the next step. Click on the **Continue** button.



### 3.2.2 Optional Password Change

To change password or email information at any time, users may open the My Profile window from the document DNA navigation bar.



To update:

- Step 1: Enter current password in **Current password** field
- Step 2: Enter a check mark in the **Change password** field
- Step 3: Enter **New password**
- Step 4: Confirm the password by reentering it in **Confirm password** field
- Step 5: Click on **Update** to finalize the changes

The Notification window informs the user when the changes have been completed. Users must acknowledge the notification before the system can proceed to the next step. Click on the **Continue** button.



### 3.2.3 Forgot Password

In document DNA there is a troubleshooting procedure when users are unable to login to the site: **Forgot your password?** This self-service procedure will minimize down time to obtain a password reset.

To utilize the self-service password reset, the user must proceed as follows:

Step 1: Click the **Forgot your password?** button. The Self Password Reset window will display



Step 2: Enter **User ID**

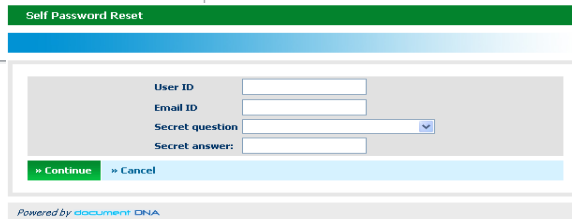
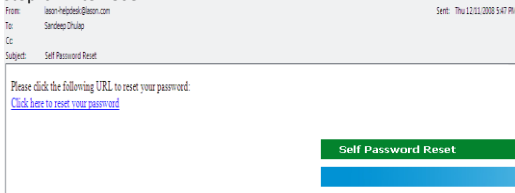
Step 3: Enter **Email ID**

Step 4: Click **Continue**

If the information provided matches the database records; the user will receive an email within two minutes (as displayed below).

Step 5: Click the link displayed in the email to continue.

Step 6: Enter **User ID**



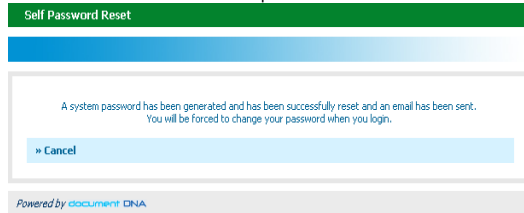
Step 7: Enter **Email ID**

Step 8: Select **Secret question**

Step 9: Enter **Secret answer**

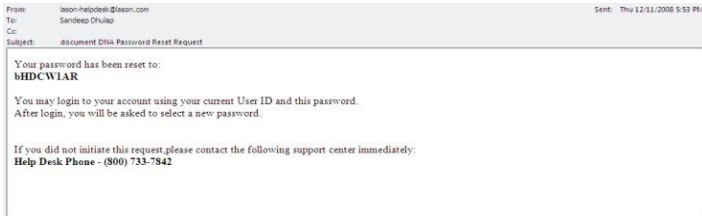
Step 10: Click **Continue**

User will receive another email for the Password Reset request.



Step 11: Click **Cancel**

**Note:** At login, the user will be forced to complete a mandatory password change (from temporary to a unique user created password).



**Note:** Contact a benefit help desk administrator if your account is locked and unable to change the password.

### 3.3 Website Navigation

Navigation within document DNA is best managed within the website by using the navigation bar

» Report List » Search Page » Search Results

Browser webpage navigation

Document DNA webpage navigation



The document DNA navigation toolbar gives users direct access to any page that has been visited during session. If a user has visited all the pages (Report List, Search, and Search Results) the toolbar will list them all as shown:

» Report List » Search Page » Search Results

## 4 Document DNA Basic User Procedures

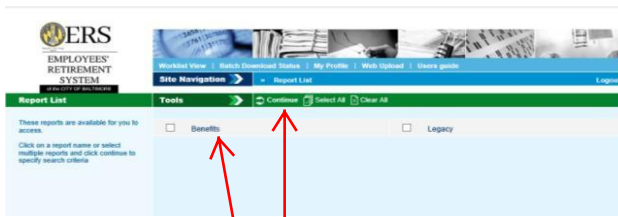
The basic procedure for locating documents within document DNA consists of the following steps:

Step 1: Select one type of reports to search

Step 2: Click on the **Continue** link

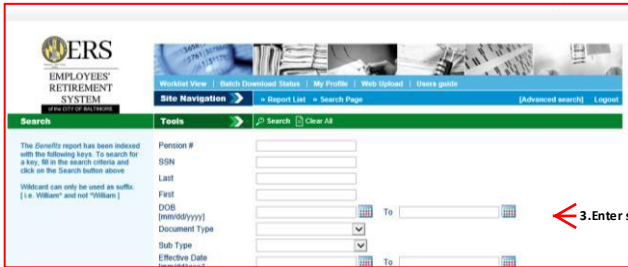
Step 3: Enter search criteria for the applicable index values, and click on the **Search** link

Step 4: From the Search Results screen, act on retrieved documents: **View, Export, or Save**

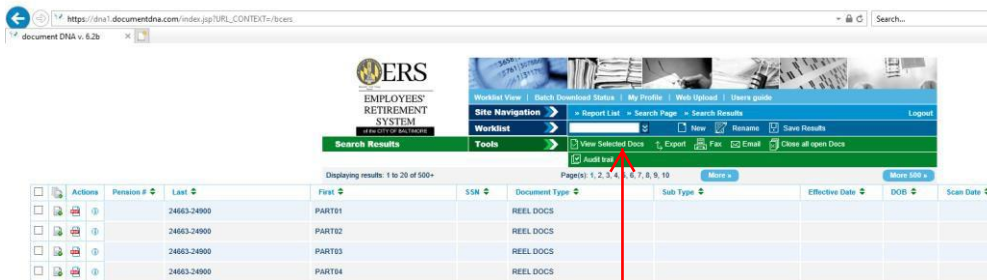


2. Click on continue

1. Select one or more types of report to search



3. Enter search criteria for index values and click on Search.



4. Act on retrieved documents: View, Export, Fax or Save to local disk

#### 4.1 Report Access

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- All the reports that a user has access to are shown below
  - Benefits
  - Legacy
  - Administration
  - Accounting
  - Human Resources
  - Retirement Savings Plan

After a successful login, the Report List screen is displayed. All the reports that a user has access to are shown. Reports that are restricted will not appear on the list.

**Note:** If the customer site has only one report, this screen will be omitted and users will be directed to the Search screen.

##### About Last Logins:

The last login dialog box displays the Last Successful login and Last Unsuccessful login:

Last Successful login:	Last UnSuccessful login:

**Last Successful login:** Displays the day, date, time, and IP address of the user's last successful login

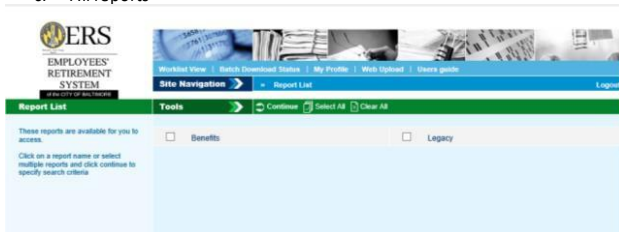
**Last Unsuccessful login:** Displays the day, date, time and IP address of the user's last unsuccessful login

### 4.1.1 Report List

The Report List screen appears if there are multiple reports in the website. This page is the start of a document DNA session. Here, the user decides the range of their document search.

Search options are:

- a. A single report
- b. A selected group of reports
- c. All reports



#### Single Report

To select a single report, click on the name. The name is the hyperlink to the report's index keys.

- ✓ Benefits

#### Select Reports

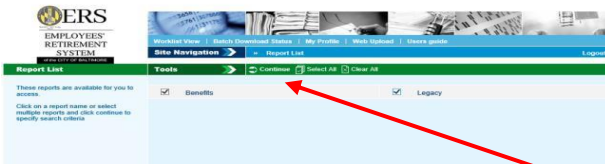
Step 1: Click on the checkbox to select desired reports

- ✓ Human Resources
- ✓ Admin
- ✓ Accounting
- ✓ Benefits
- ✓ Legacy
- ✓ Retirement Savings Plan

Step 2: Click on the  link to proceed



**Note:** The checkboxes are toggle switches. To remove a checkmark, click on it again.



1. Click once in the checkbox to make a selection
2. Click continue to proceed



## 5 Search

For each report in the Report List screen, there is a corresponding Search screen. The Search screen lists all the index keys that are available for the report. Index keys can be searched on individually or collectively.

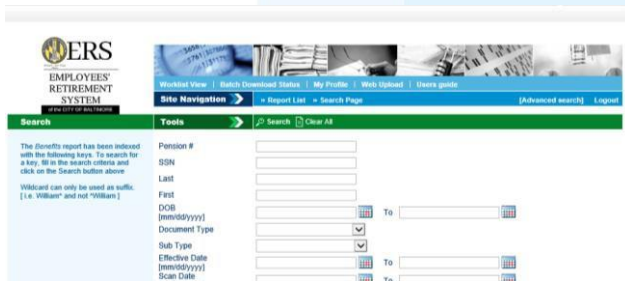
If a single report is selected, the user will see the index keys for only that report.

### For Example: Click on Benefits

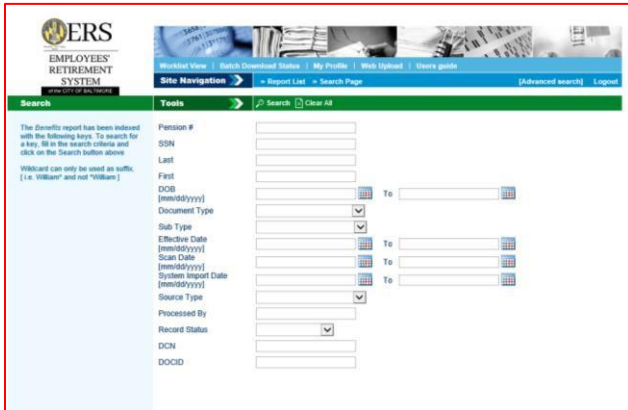
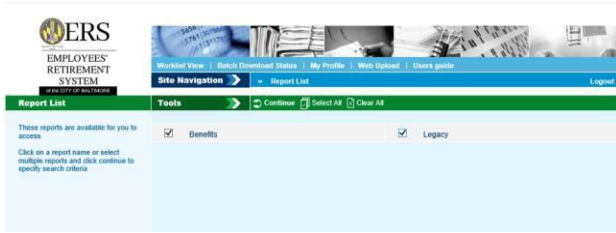
The user will view all indexes for the Benefits department only.

### Click on Benefits and Legacy

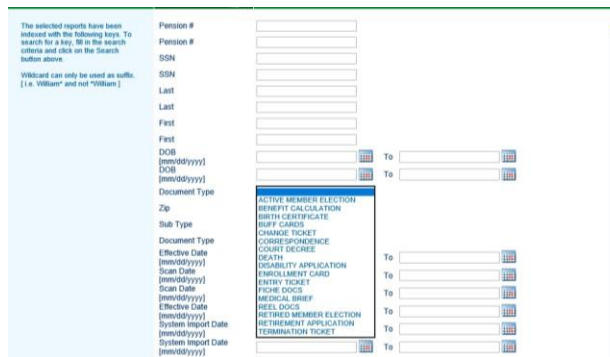
The user will view all indexes for Benefits and Legacy



If multiple reports are selected, the user will see the combined index keys in a single Search screen.



Drop down lists are used in cases where there are multiple selections and may vary in length. If there are too many values for the size of the window, a vertical scrollbar will support user navigation.




## 5.1 Search Options

There are four index key data types in document DNA: text, date, number and currency. Each type has its own search options.

### Text

The most common index key used in reports is text. Text field accepts alpha/numeric values and trailing wildcards.

- a. To search for a text type index key, fill in the search criteria and click on the  Search link.


Last

For more general searches, users may insert the string substitution asterisk "\*" wildcard, however, the wildcard can only be used as suffix, (e.g., W\*).

Last

Example: means that the user is searching for every Member Name that begins with a "W" regardless of how many characters there might be in the name.

**The reports that the users select have been indexed with keys. To search for a key, fill in the search criteria and click on the Search button. Wildcard can only be used as a suffix.**

Pension #	<input type="text" value="401319"/>
SSN	<input type="text"/>
Last	<input type="text"/>
First	<input type="text"/>
DOB [mm/dd/yyyy]	<input type="text"/> 

- Type Pension # in the index box, the system will locate all documents with that pension #
- Type W\* (wildcard) in the index box for first name: the user is searching for every member that begins with a "W" regardless of how many characters in the name.
- Type SSN in the index box, the system will locate all documents with the SSN



Type DOB in the index box, the system will locate all documents with the DOB


### Date

When a date field is formatted in the document DNA default of MM/DD/YYYY, there are two options:

- a. Search on a specific date
- b. Search on a range of dates

Users may type dates into the **From** and **To** fields from their keyboard or use the **calendar tool**.



Date [mm/dd/yyyy]   To  


 **Calendar Tool**

When using the **Calendar Tool**, a calendar window displays to help format the date. The default is the current date.



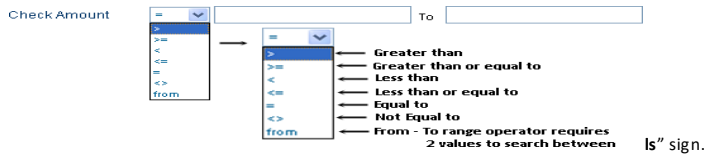
To change the year, click on  to decrease the value or  to increase it

To change the month, click on  to decrease the value or  to increase it

To pick a day, click on the numbered titles, ie. 

### Number and Currency

Searches on numbers and currency are assisted by a list of standard relational symbols. To see the list of operators, click on the drop-down arrow next to the highlighted "equals" sign.



The operators listed on the left side of the drop-down list only work with single numerical values. If a second number is entered in the To field, it will be ignored. The only operator that needs two numbers is the **From** operator. **From** is the only operator that searches for a range of values. The same relational operators are used for currency data

### Error Message

No Documents Found

Pension #	<input type="text" value="1234"/>
SSN	<input type="text"/>
Last	<input type="text"/>
First	<input type="text"/>
DOB [mm/dd/yyyy]	<input type="text"/>
Document Type	<input type="text" value="v"/>

If no documents match the user's search criteria, the message "No Documents Found" will appear above the index keys.

The user can then modify the search criteria in the same screen and click **Search** again. If the new search is successful, the error message will disappear, and results will be returned.

If the message persists, it means that there are no matches to the revised search criteria, or the user is attempting to access restricted data.

**Note:** Users may exit this page by clicking the [» Report List](#) link on the document DNA toolbar.

## 5.2 Search Results

The Search Results screen contains documents returned from the search and the tools for working on them. The documents are displayed in a matrix of index values. All index keys are displayed. If there are too many columns for the user's display settings, a horizontal scrollbar is shown to provide access to all the columns.

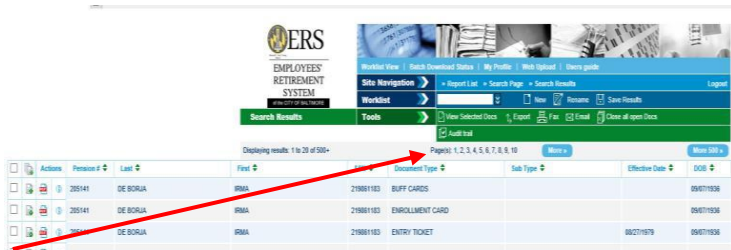
The screenshot shows the ERS (Employees' Retirement System) Search Results interface. At the top, there is a navigation bar with 'Home', 'Search', 'My Profile', and 'Logout' options. Below this is a 'Search Results' header with a 'Tools' menu containing 'View Selected Docs', 'Export', 'Fax', 'Email', and 'Close All open Docs'. The main area is a table of search results with columns for 'Actions', 'Person #', 'Last', 'First', 'SSN', 'Document Type', 'Sub Type', 'Effective Date', 'DOB', and 'Scan Date'. The table contains multiple rows of data for employees like YOUNG, JACQUELINE and HOPKINS, DAVID. A red box highlights the top navigation and toolbars. A yellow box highlights the table headers. A blue box highlights the left sidebar. A green box highlights the bottom of the table. A legend at the bottom left lists seven callouts:

1. Document Operations Toolbar
2. Index Key Titles
3. Index Key Values
4. View Topic Information
5. View PDF Image Document
6. Add Document to a Worklist
7. Checkbox for selecting a document (View, Export, Fax, Email, etc.)

### Document Access Tools:


The Search Results screen can accommodate 20 documents at a time (by default). If more than 20 documents are retrieved, the first 20 are displayed, and links to the remaining groups of 20 are listed below the **Green Document Operations Toolbar**. The default setting can be adjusted in the user's My Profile screen to values between 10-500. However, a value of no more than 250 is recommended as the user may experience a delay for return results.

- Click on the numbered Page(s): [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) to update the screen display to the desired documents set.



Click on a numbered hyperlink to update the screen display to the desired document set

**Sorting the Search Results List:**

An index key, noted by this icon , is specified for default sorting at the time of report creation. A user can resort the list on any index value by clicking on the arrows in the column header.

Actions	Personnel	Last	First	Last	Document Type	Sub Type
	000078	RAY	YOUNG	200300010	PHONE CARD	
	014306	RAY	DELUWY	200341000	PHONE CARD	
	024874	RAY	WARRING	210000011	PHONE BOOK	
	014327	RAY	ROBERTS	210000000	CHANGE TICKET	
	014327	RAY	ROBERT	210000000	CHANGE TICKET	

Actions	Personnel	Last	First	Last	Document Type	Sub Type
	000067	WOLSKA	GLORIA	210000004	ACTIVE MEMBER ELECTION	
	011000	WOLSKA	KAZDAN	210000000	ACTIVE MEMBER ELECTION	
	014327	WOLSKA	KAZDAN	210000000	ACTIVE MEMBER ELECTION	
	004004	WOLSKA	YOUNG	210000000	ACTIVE MEMBER ELECTION	
	007800	WOLSKA	JONES	200700000	ACTIVE MEMBER ELECTION	
	000004	WOLSKA	KORDELL	210000000	ACTIVE MEMBER ELECTION	
	000007	WOLSKA	JONES	210000000	ACTIVE MEMBER ELECTION	
	007118	WOLSKA	CHRYSLER	000000017	ACTIVE MEMBER ELECTION	
	007140	WOLSKA	ANDRE	210001000	ACTIVE MEMBER ELECTION	
	007000	WOLSKA	DUNN	210000000	ACTIVE MEMBER ELECTION	

## 6 Advanced Search

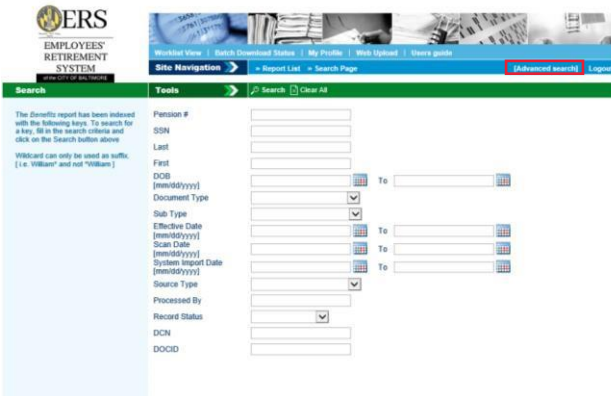
The Advanced Search allows the user to perform a search based on **AND/OR** criteria. The Advanced Search also supports for **IN, NOT IN, NOT EQUAL TO** queries depending on the data and type of indices. It supports blank value search, sort on multiple indices, and has the ability to save queries for future use. Users may also choose their preferred screen, **Simple Search** [default search page] or the **Advanced Search** page by updating their profile. To go to the **Advanced Search**, follow the steps noted below:

Step 1: Select any report(s) from the Report List page

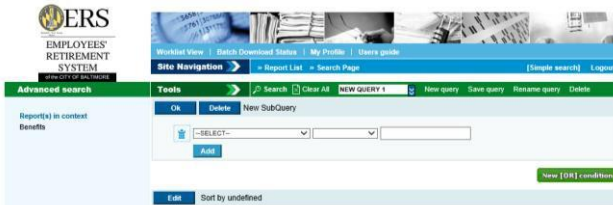
Step 2: Click on the report name link and click , the default Search screen



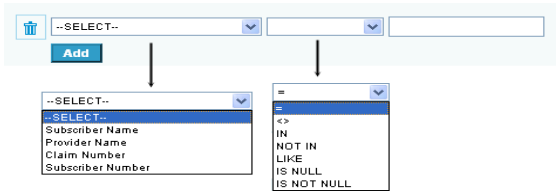
Step 3: The Advance Search option displays at the top right of the default Search screen



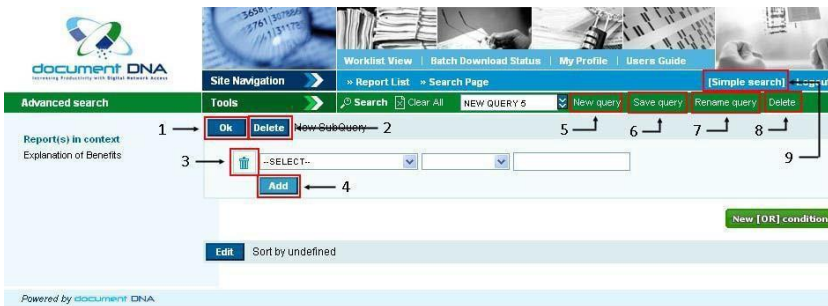
Step 4: Click on the **Advance Search** link, Advance Search page populates



Step 5: The Advance Search allows the user to perform a search based on **AND/OR** criteria. Search criteria can be selected from the drop-down list



Step 6: Advanced Search also supports for IN, NOT IN, NOT EQUAL TO queries depending on the data and type of indices. It supports blank value search, sort on multiple indices, and has the ability to save queries for future use.



1. To apply changes
2. To delete condition
3. To remove topic search definition
4. To add topic search definition
5. To add New query
6. To Save the query
7. To rename the existing query
8. To delete the query
9. Go back to simple search



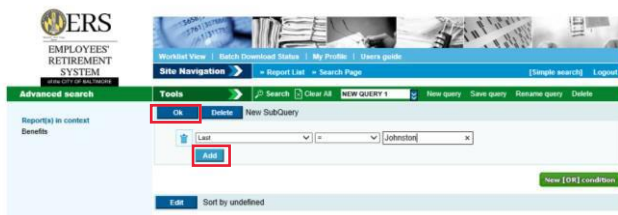
**Create a Query:**

Step 1: The default setting is set to create a new query; this is displayed in the drop-down list. The default name is 'NEW QUERY 1'. If NEW QUERY 1 has already been used, then the number will be incremented to the next available number.

Step 2: Select the required criteria fields.

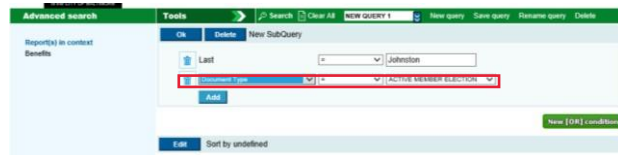
- o Index key (these will be the same default search)
- o Relational symbols (=, <>, IN, NOT IN, LIKE, IS NULL, IS NOT NULL)
- o Identify data from the documents to search, (e.g., Subscriber Name = Langston)

Step 3: Click on the **Ok** button to apply



**Add a Sub-query:**

To add additional criteria within the same sub-query on a different index key, click on the **Add** button (the index keys that were not used in the previous sub-query will appear as choices).



**Add the [OR] condition:**

Users can create a sub-query with an OR condition by using the **New [OR] condition** button.

Step 1: Create a query

Step 2: Click on the **New [OR] condition** button

Step 3: Select the required criteria fields.

- a. Index key (these will be the same default search)
- b. Relational symbols (=, <>, IN, NOT IN, LIKE, IS NULL, IS NOT NULL)
- c. Identify data from the documents to search, (e.g., Subscriber Name = Langston)

Step 4: Click on the **Ok** button to apply

The example below displays a user looking for blank or \$0.00 check amounts:Sub-query 1

- Index key (Check Amount)
- Relational symbols (=)
- Identify data from the documents to search (IS NULL)

Sub-query 2

- Index key (Check Amount)
- Relational symbols (=)
- Identify data from the documents to search (0.00)




**Edit a Query**

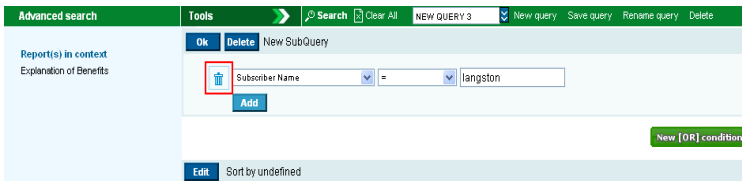
Step 1: To edit the selected criteria, click the **Edit** button that describes the search criteria selected. In the example below the selected parameters are:

- a. Index key (Subscriber Name)
- b. Relational symbols (=)
- c. Data from the documents to search (Langston)



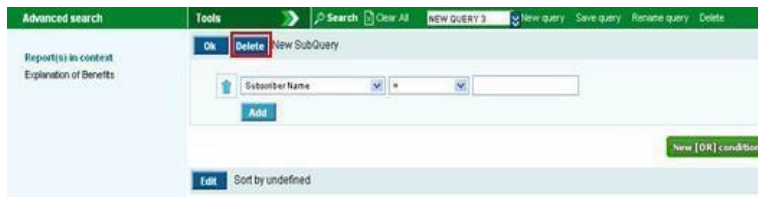
Step 2: User will have access to the edit the query

Step 3: To remove a sub-query, click on the  icon. The current topic search condition will be removed, confirm via the dialog pop-up box



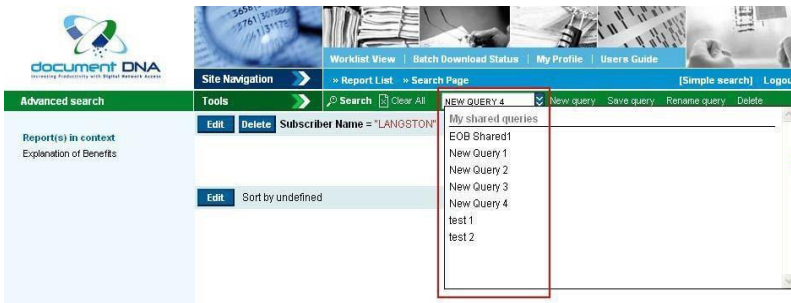
Step 4: Click on the **Cancel** button to remove any changes

Step 5: Click on the **Delete** button to delete the current selected criteria in the sub-query



**Save Query:**

When the criteria for the query have been completed, click on the **Save query** link. **NEW QUERY 4**



**Rename Query:**

To rename the query, click on **Rename query** link. The highlighted field becomes activated; enter a unique name to rename the query.

**Note:** A query cannot be renamed until after the sub-query has been created and saved.



## 7 Text Search

The **Text Search** function allows the user to search within text documents for specific patterns that are not already designated as index keys. Text Search may be available on the entire document, or solely specific regions of a document as specified during report configuration.

It is important to note that users must specify at least one search criteria (e.g., an index search value) in order to also specify a text search pattern. Use of a date or date range, whenever possible, will reduce query time and will take search priority before the index key search criteria.

Text search (for text-based documents) enables users to search for text patterns across all documents:

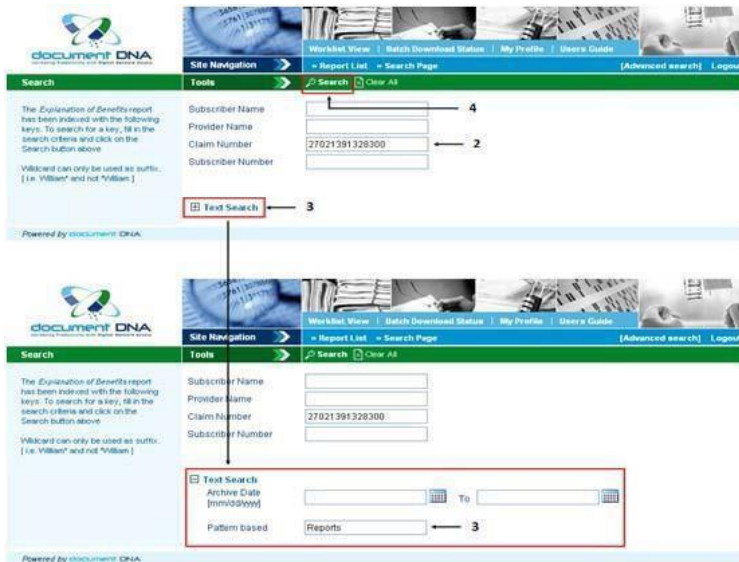
- Returned by search criteria for at least one index field
- Archived in a given date range
- On a specific region of the text page (where a policy or region is defined)

To view the Text Search details follow the steps given below:

Step 1: On the Report list page the user must choose a report that has text documents loaded, and click **Continue**, (the Search Page will display the Text Search option as noted in image below)

Step 2: Enter index key criteria to narrow the query of the document search

Step 3: Enter the Pattern based text search criteria (or date range)



Step 4: Click on **Search** link

Step 5: Search results screen is displayed

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	099999901

## 8 Document Operations

### Document Details:

For each document, there is a list of properties or details. To see the properties, click the **information icon** on the line of the desired document.

Actions	Pension #	Last	First	SSN	Document Type	Sub Type
	205673	YOUNG	JACQUELINE	212802317	BUFF CARDS	PRIOR MEMBERSHIP
	205673	YOUNG	JACQUELINE	212802317	BUFF CARDS	
	205673	YOUNG	JACQUELINE	212802317	ENROLLMENT CARD	
	205673	YOUNG	JACQUELINE	212802317	ENTRY TICKET	
	205673	YOUNG	JACQUELINE	212802317	ENTRY TICKET	

**Index Update**

Report ID: BCE01  
 Report Name: Benefits  
 Report Version: 12/15/2020 12:02:37  
 Batch ID: HORICE-2033800981  
 Report Section: 3228664  
 Report Type: TPF2  
 Doc Size in pages: 5

**CHIEF DATA VALUE**

Pension # 225280  
 SSN 219767053  
 Last LITTLE  
 First SHELLAE  
 DOB [mm/dd/yyyy] 11/10/1958  
 Document Type ACTIVE MEMBER ELECTION  
 Sub Type  
 Effective Date  
 Scan Date [mm/dd/yyyy]  
 System Import Date [mm/dd/yyyy] 12/15/2020  
 Source Type PAPER  
 Processed By EXELA  
 Record Status COMPLETE  
 DCN 2020350BCERS00000257

**REPORT DATA VALUE**

225280  
 LITTLE  
 SHELLAE  
 11/10/1958  
 ACTIVE MEMBER ELECTION  
 12/15/2020  
 PAPER  
 EXELA  
 COMPLETE

Document System ID

Application Name

Report Number, Date, or Currency

Doc Size in pages

Update the fields

Data doc. was downloaded in Doc DNA

Doc unique identifier (combination of index keys)

### 8.1 View Documents

To view a single document present in the report list, users can click on the applicable view document icon in the Actions field. Document types are represented by the following icons:

- Text Document (TXT, ASP, DJDE, EBCDIC)
- Associated Documents (documents associated with MS Office, e.g., Word & Excel)
- Image Document (PDF, TIF, JPG)

**Note:** Text documents are viewed in PDF format.

Actions	Pension #	Last	First	SSN	Document Type	Sub Type
	205673	YOUNG	JACQUELINE	212802317	BUFF CARDS	PRIOR MEMBERSHIP
	205673	YOUNG	JACQUELINE	212802317	BUFF CARDS	
	205673	YOUNG	JACQUELINE	212802317	ENROLLMENT CARD	
	205673	YOUNG	JACQUELINE	212802317	ENTRY TICKET	
	205673	YOUNG	JACQUELINE	212802317	ENTRY TICKET	

### 8.1.1 Adobe Acrobat Options /Viewing Documents

The **View Selected Docs** function makes it possible to review documents more efficiently by giving user the ability to open several documents for viewing at one time by:

- a. Reviewing them as separate documents
- b. Navigating through individual documents by groups of pages rather than one page at a time

Step 1: Select documents for viewing by clicking in the applicable check boxes

The screenshot shows the document DNA search results page. At the top, there is a navigation bar with 'View Selected Docs' highlighted. Below it is a table with the following columns: Actions, Report Name, Subscriber Name, Provider Name, Claim Number, and Subscriber ID. The table contains six rows of data, with the first four rows having their 'Actions' column checkboxes checked. A red box highlights the 'View Selected Docs' button in the toolbar and the checked checkboxes in the table. A red box also highlights the 'View' button at the bottom of the page.

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber ID
<input type="checkbox"/>	Explanation of Benefits	LANGSTON	CLYDE FOOTANKLE CTRL_1	27021391328300	9999999010
<input checked="" type="checkbox"/>	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
<input checked="" type="checkbox"/>	Explanation of Benefits	SHERWIN HALL	G P HENDRICKS MD	27021418121600	9999999030
<input checked="" type="checkbox"/>	Explanation of Benefits	SHANKIA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
<input checked="" type="checkbox"/>	Explanation of Benefits	SONNY W GOODARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
<input type="checkbox"/>	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	9999999060

Step 2: Click the **View Selected Docs** link to open the View Selected Documents – Options window

In the **View as** section users choose:

Step 3: Which **data type** to open the documents

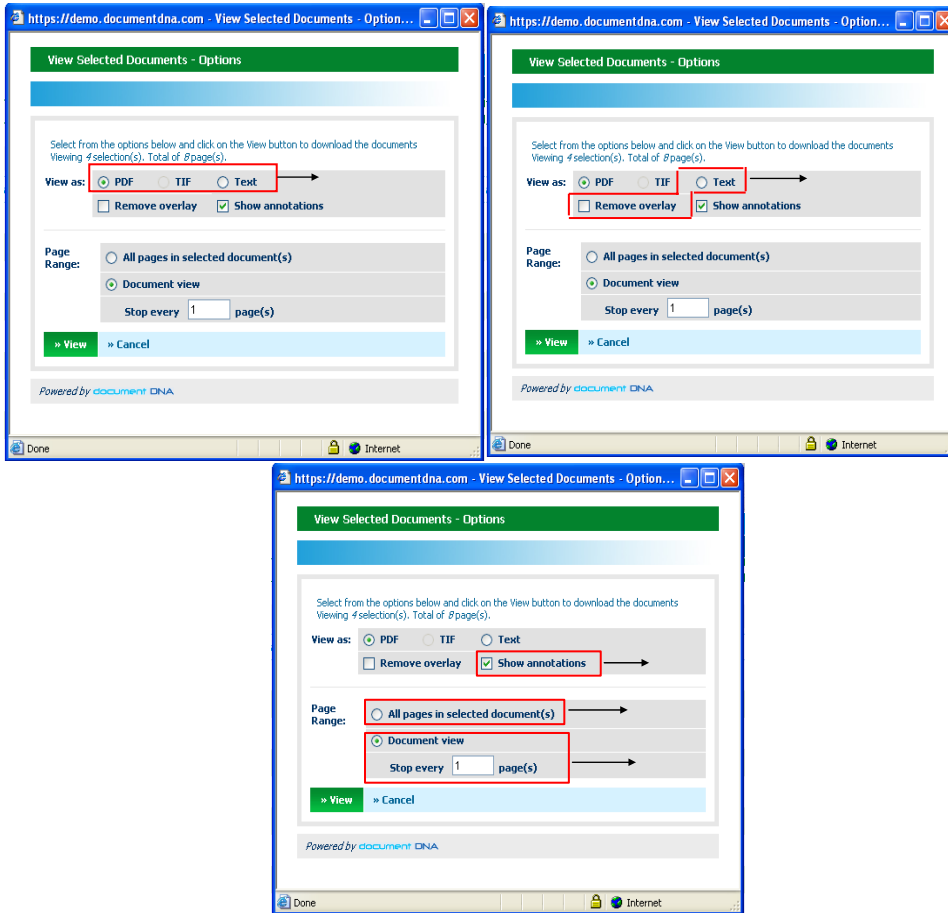
In the **Page Range** section users choose:

Step 4: All pages in selected documents(s), (merges all docs selected into one PDF)

Step 5: **Document view**, (view each document as a separate PDF)

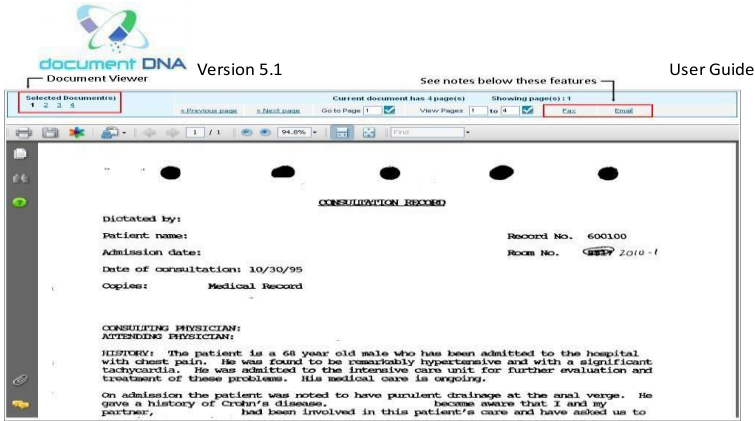
Stop every page(s). (if data is on a specific page in a group, select a reference page)

Step 6: Click **View** button

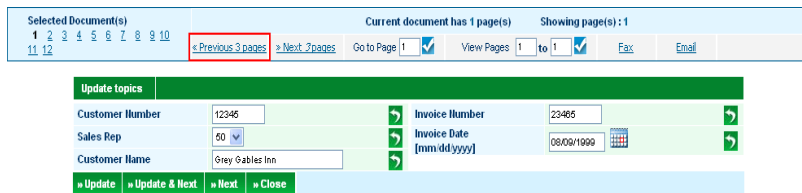


Step 9: The first page of the first document is displayed. Click on the **Next** button to see the second page in the first document.



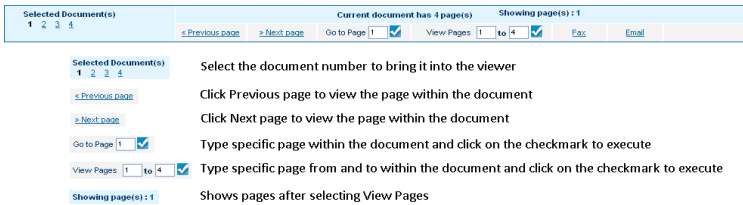


Example of Document View with Stop Every 3 Pages:



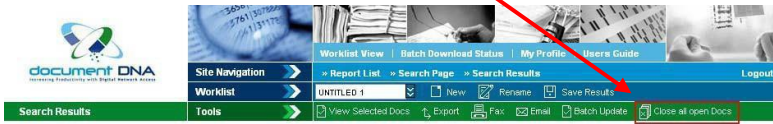
**Note:** If the customer has requested the Fax or Email features to be enabled, users will be able to perform these functions from this screen.

### Document View Features



**Close All Open Documents**

To close all open documents, click on the  link as shown below:



The screenshot shows the document DNA interface. At the top, there is a navigation bar with several tabs: 'Worklist View', 'Batch Download Status', 'My Profile', and 'Users Guide'. Below this is a 'Site Navigation' bar with links for 'Report List', 'Search Page', 'Search Results', and 'Logout'. A 'Worklist' dropdown menu is open, showing 'UNTITLED 1' and options for 'New', 'Rename', and 'Save Results'. Below the worklist is a 'Tools' bar with icons for 'View Selected Docs', 'Export', 'Fax', 'Email', 'Batch Update', and 'Close all open Docs'. A red arrow points from the text above to the 'Close all open Docs' button.

Displaying results: 1 to 15

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber I
	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	9999999010
	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
	Explanation of Benefits	SHERWIN HALL	G P HENDRICKS MD	27021418121600	9999999030
	Explanation of Benefits	SHANKA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040


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## 8.2 Export Data

The Export tool provides two options for exporting document DNA data as CSV files and XML files:

- Export the search results list (entire search results or selected documents)
- Export data extracted from the documents (COLD data only, not scanned images)

### Export Search Results List:

Step 1: Select the desired documents by indicating the check boxes and click on the  link.



Search Results Tools View Selected Docs Export Fax Email Close all open Docs

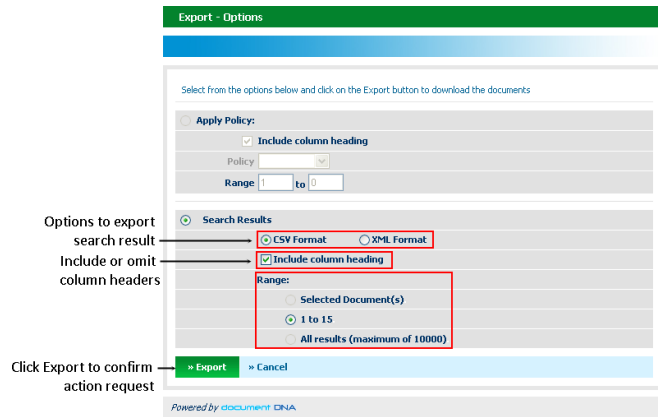
Displaying results: 1 to 15

Actions	Report Name	Subscriber Name	Provider Name	Claim Number
<input checked="" type="checkbox"/>	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300
<input checked="" type="checkbox"/>	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800
<input checked="" type="checkbox"/>	Explanation of Benefits	SHERWIN HALL	O P HENDRICKS MD	27021418121600
<input checked="" type="checkbox"/>	Explanation of Benefits	SHANKA G GREENWICH	HAINES OB AND GYNPA	27021180420400
<input checked="" type="checkbox"/>	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800

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Export this table

Step 2: **Export** - Options screen will populate.



Export - Options

Select from the options below and click on the Export button to download the documents

Apply Policy:

Include column heading

Policy: [dropdown]

Range: [1] to [0]

Search Results

CSV Format  XML Format

Include column heading

Range:

Selected Document(s)

1 to 15

All results (maximum of 10000)

Options to export search result

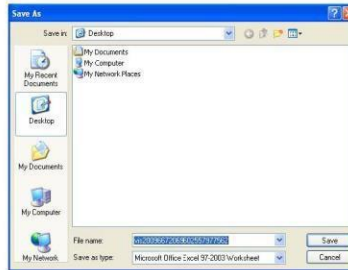
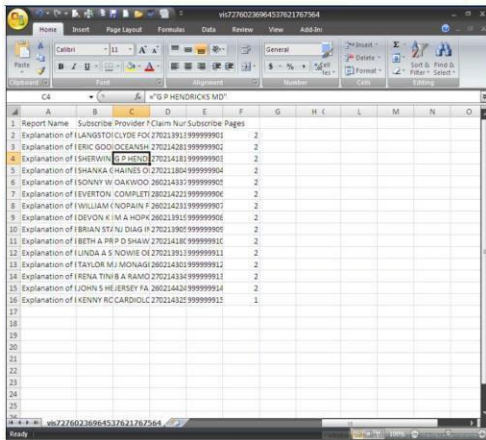
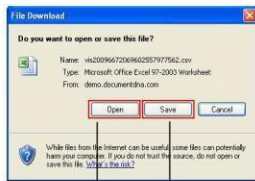
Include or omit column headers

Click Export to confirm action request

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**Note:** The **Export** option can accommodate a maximum of 10,000 documents at a time.

Step 3: Choose from Open, Save and Cancel



Export COLD Document Data:

If available, this optional feature performs a second level search into documents selected from the search results list and extracts pre-defined fields of text data. The data is then formatted as a CSV file and can be downloaded using the same procedure as for the Search Results List.

The set of search rules for this option is called a policy. One or more policies can be defined per report. Each policy contains instructions for identifying and reading different sets of data fields. For example, a bank report contains documents that are formatted as shown below.

NORTH AMERICAN BANKING CO												PAGE 1							
DAILY PENDING TRANSACTION RELEASE REPORT												PRINTED ON 06-25-94							
												TIME - 01:36							
CO	ACCT	COBT	TRN	TRN	TRAN	EFF	EMPL-VEND	EXEC-EMPL	EXTERNAL	SRC	TRANSACTION	TRANSACTION	INTERNAL						
NO	NUMBER	CEN/CHK	CHK	TRF	DATE	DATE	NUMBER	NUMBER	DOC	NBR	AMOUNT	DESCRIPTION	DOC						
10	109042	1059	01	0	062494	062494	0	0	1769024	500	35.19	FROM CL POSTING	941750001						
10	242404	1059	02	0	062594	062494	0	0	1769031	600	712.75		941750002						
10	242537	1059	02	0	062594	062494	0	0	1769023	200	79.68		941750003						
10	411058	1058	02	0	062494	062494	0	0	1769025	500	29.02	FROM CL POSTING	941750004						
10	411256	1058	02	0	062494	062494	0	0	1769027	500	6.17	FROM CL POSTING	941750005						
10	620203	1058	01	0	062594	062494	0	0	1769032	200	79.68	INTEREST BARNED TODAY 000	03941750006						
10	650804	1060	01	0	062594	062494	0	0	1769028	600	271.50		941750007						
10	652008	1060	01	0	062594	062494	0	0	1769029	600	77.95		941750008						
10	653063	1060	01	0	062594	062494	0	0	1769030	600	363.30		941750009						
TOTALS												DEBIT =	827.62	CREDIT =	827.62	RETRO-DR =	.00	RETRO-CR =	.00

### 8.3 Email Documents

This feature is optional based on customer requirements, and may therefore not be available for all users.

There are 2 ways to email documents from document DNA:

- a. As an attachment with user's email, or
- b. As a link to the document

Attachments are sent as PDF files, one PDF file per email. If more than one document is selected, all the documents are merged into one PDF file.

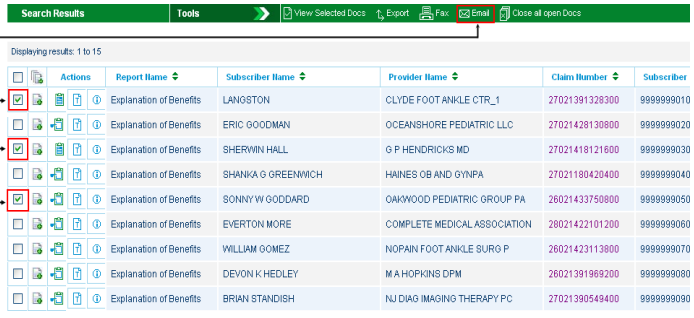
If there is an attachment size limit imposed on the email recipient, it is best to send URL links for documents that may exceed the limit. If several documents are selected, each document will have its own link. The secure link restricts the recipient to viewing only the document specified and provides no access to view any other documents on the document DNA site.

**Email Attachments:**

Step 1: Select documents to be emailed

Step 2: Click the  link

2. Click E-mail



Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
<input checked="" type="checkbox"/>	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	9999999010
<input type="checkbox"/>	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
<input checked="" type="checkbox"/>	Explanation of Benefits	SHERWIN HALL	G P HENDRICKS MD	27021418121600	9999999030
<input type="checkbox"/>	Explanation of Benefits	SHANIKIA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
<input checked="" type="checkbox"/>	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
<input type="checkbox"/>	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	26021422101200	9999999060
<input type="checkbox"/>	Explanation of Benefits	WILLIAM OOMEZ	NOPAIN FOOT ANKLE SURG P	26021423113800	9999999070
<input type="checkbox"/>	Explanation of Benefits	DEVON K HEDLEY	M A HOPKINS DPM	26021391989200	9999999080
<input type="checkbox"/>	Explanation of Benefits	BRIAN STANDISH	NJ DIAG IMAGING THERAPY PC	27021390549400	9999999090

Step 3: To set options for sending documents as attachments:

The screenshot shows the 'Email Selected Documents - Options' dialog box. Annotations include:

- Sender's e-mail address taken from "My Profile"**: Points to the 'From' field.
- Separate multiple recipients with commas or semicolons**: Points to the 'To', 'CC', and 'BC' fields.
- Enter a subject line**: Points to the 'Subject' field.
- Select to send attachment as PDF file**: Points to the 'Send documents as attachments' radio button.
- Enter a message**: Points to the 'Comments' text area.
- Optional: Add e-mail signature (taken from "My Profile")**: Points to the 'Add Signature' checkbox.
- Select to send the PDF attachment in zip format. Users can also protect the zip file with a password, (10 characters or less).**: Points to the 'zip format' and 'Password protect' options.

For [Address Book](#) instructions click the link.

Optional: Select to send the PDF attachment in zip format. Users can also protect the zip file with a password, (10 characters or less).

Step 4: Click **Send**

Step 5: Close confirmation window

The screenshot shows a confirmation window titled 'Email Sent Successfully' with a green header and a 'Close' button.

The recipient will receive an email as shown below with a PDF attachment. Use Adobe Acrobat to open the PDF attachment for viewing.

The screenshot shows an email client interface with the following details:

- From:** Document DNA Generic user [autogenemail@documentdna.com]
- To:** Richard Houston
- Subject:** test
- Attachments:** 1323.pdf (60 KB)
- Body:** Test

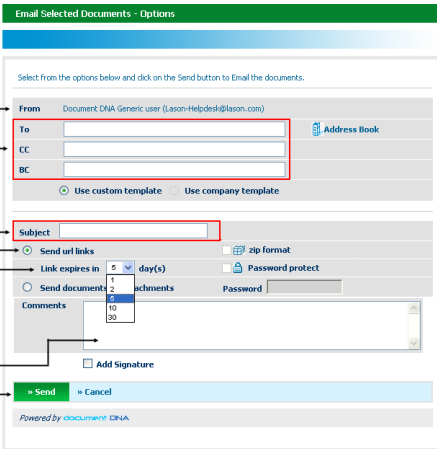
**Email URL Links:**

The procedure for emailing documents with URL links is the same as sending attachments, with the exception of changing the delivery mode from attachment to URL link.

Step 1: Select documents to be emailed

Step 2: Click the  link

Step 3: To set options for sending documents as **attachments**:

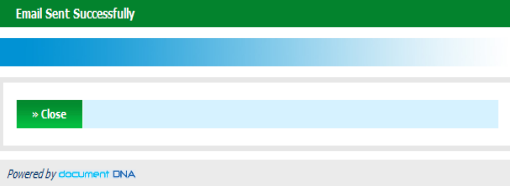


The screenshot shows the 'Email Selected Documents - Options' dialog box. Annotations on the left side point to various fields and options:

- Sender's e-mail address taken from "My Profile"**: Points to the 'From' field.
- Separate multiple recipients with either commas or semicolons**: Points to the 'To' field.
- Enter a subject line**: Points to the 'Subject' field.
- Select the URL link option**: Points to the 'Send url links' radio button.
- Set the number of days before the link expires. (Default= 5 calendar days)**: Points to the 'Link expires in' dropdown menu.
- Enter a message**: Points to the 'Comments' text area.
- Click Send to proceed**: Points to the 'Send' button.

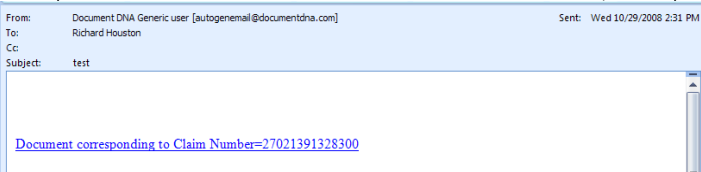
Step 4: Click **Send**

Step 5: Close confirmation window



The screenshot shows a confirmation window titled 'Email Sent Successfully'. It features a green header bar, a light blue background, and a single 'Close' button in a green box. At the bottom, it says 'Powered by document DNA'.

The recipient will receive an email with links to the documents in **document DNA**, one link per document.



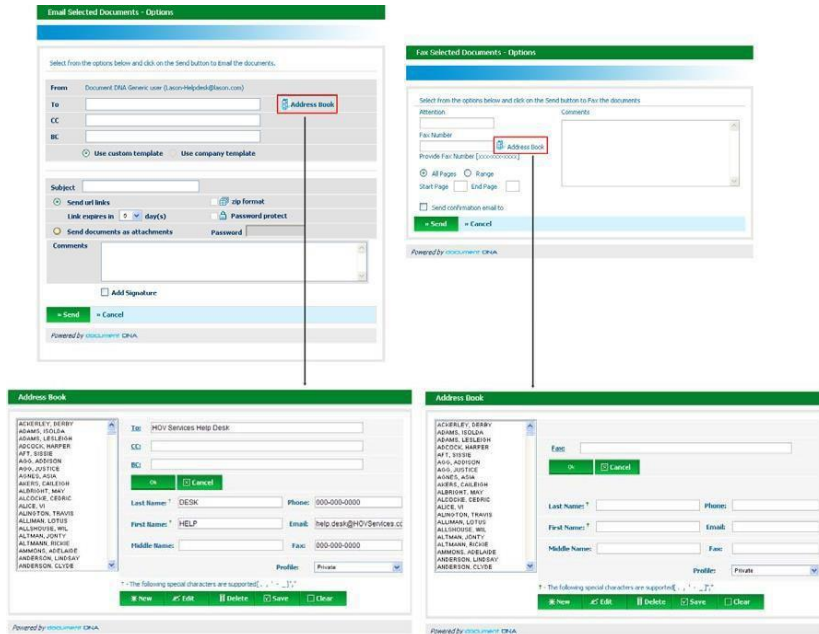
The screenshot shows an email received by the recipient. The header information is as follows:

- From:** Document DNA Generic user [autogenemail@documentdna.com]
- To:** Richard Houston
- Cc:**
- Subject:** test
- Sent:** Wed 10/29/2008 2:31 PM

The body of the email contains a single blue hyperlink: [Document corresponding to Claim Number=27021391328300](#)

## 8.4 Address Book

The Address Book feature allows the user to store frequently used email addresses and fax numbers.



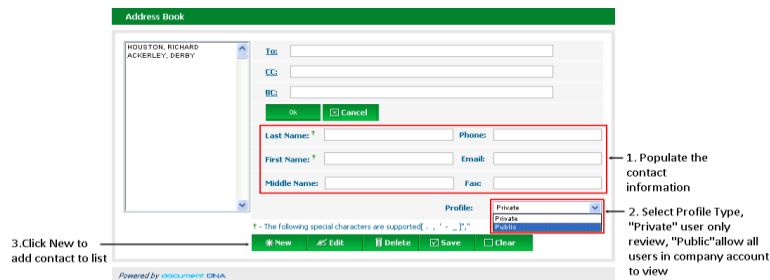
### Create New Profile

To create a New contact, perform the following steps:

Step 1: Enter the contact information in the applicable fields

Step 2: Select the Profile Type (Public/Private) from the drop-down list

Step 3: Click **New** to add to the address book

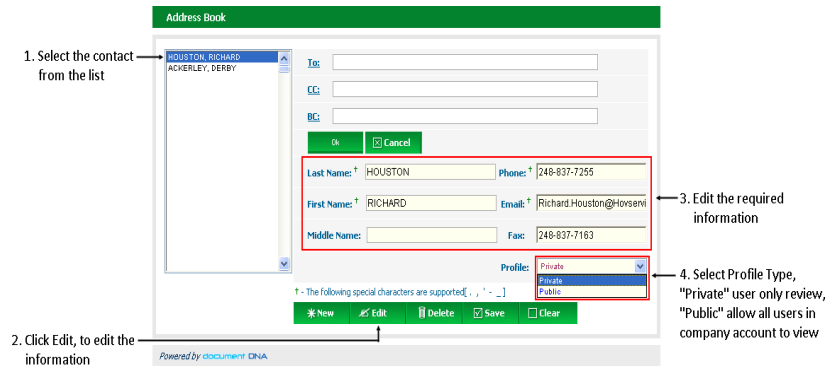




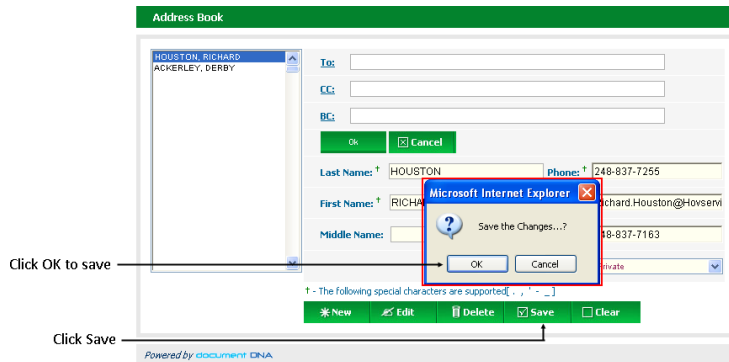
**Edit Profile**

To Edit a contact, perform the following steps:

- Step 1: Select the contact from the list
- Step 2: Click to the **Edit** button
- Step 3: Edit the applicable information
- Step 4: Edit the Profile Type if desired



Step 5: Click Save

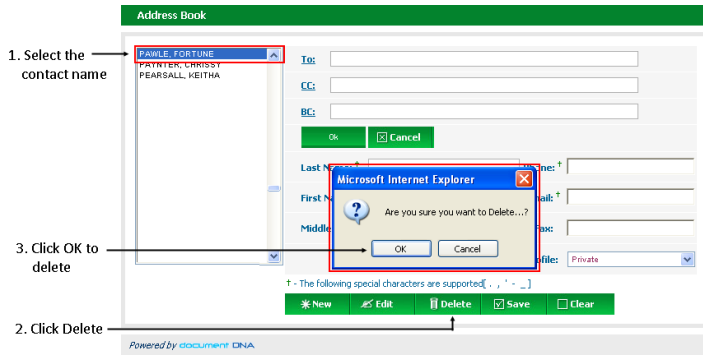


**Note:** Users can click on the **Clear** button when creating a new profile or while editing an existing profile to remove current updates.

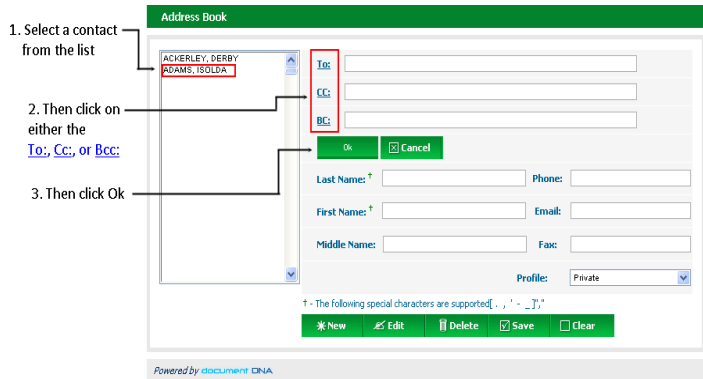
**Delete Profile**

To Delete contact information from the address list, perform the following steps:

- Step 1: Select the contact name
- Step 2: Click the **Delete** button
- Step 3: Delete dialogue box will display, click Ok to confirm deletion



**Email – Address Book Page**

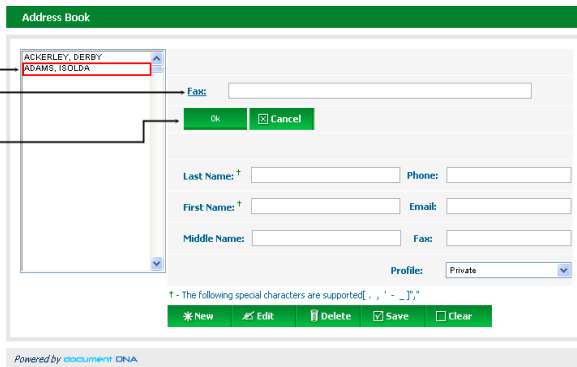


Fax – Address Book Page

1. Select a contact from the list

2. Then click on the [Fax](#)

3. Then click Ok



The screenshot shows the 'Address Book' window. On the left, a list of contacts is displayed with 'ADAMS, ISOLDA' selected. On the right, a form for editing contact details is visible. The form includes fields for 'Last Name', 'First Name', 'Middle Name', 'Phone', 'Email', and 'Fax'. There are also 'Ok' and 'Cancel' buttons. At the bottom, there are icons for 'New', 'Edit', 'Delete', 'Save', and 'Clear'. A note at the bottom states: '\* - The following special characters are supported: [ , ' - \_ ] \*'. The footer of the window reads 'Powered by document DNA'.

### 8.5.1 Batch Download

Users can download a maximum of 500 pages at one time. If users would like to view a large number of images (more than 500 pages) they will be processed through a batch download request so the user can continue working in document DNA while waiting for the batch to process.

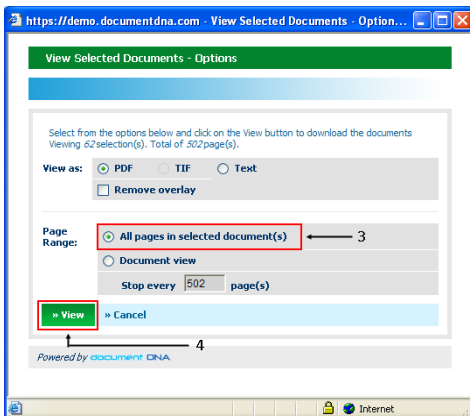
Step 1: Select documents (more than 500 pages)

Step 2: View Selected Docs



Step 3: In the View Selected Documents-Option pop up, click on the radio button for All Pages in Selected documents

Step 4: Click on the **View** button



Step 5: The Batch Download Notification window will display; enter a title in the **Enter request description** field.

**Batch Download Notification**

The maximum number of pages that can be downloaded interactively is limited to <500 pages.

Your request for 500 pages will be handled as a batch download request.

The request will be processed and is estimated to be available in the next 3 minutes and 8 seconds.

Enter a description in the space below to assist you in locating your request once it is completed.

Once the batch download is completed, you can view the document by clicking on the "Batch Download Status" link in the upper right hand corner of any document DNA screen. You will see the "request description" on that screen to help in identification.

You may view this document any number of times the next 30 days without delay by clicking the "Batch Download Status" link and selecting the document.

Enter request description:

[» Continue](#) [» Cancel](#)

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Step 6: Users will receive a Batch Download Notification with a **request ID** at submission.

**Batch Download Notification**

Your request has been successfully submitted. Your request ID is "1961".

[» Close](#)

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Step 7: The user must check on the status of the batch by clicking on the **Batch Download Status** link.

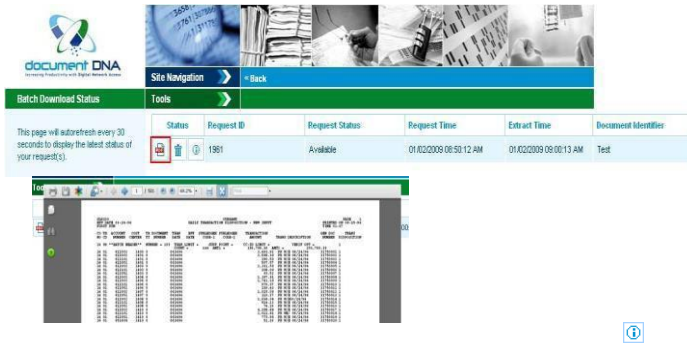
The screenshot shows the document DNA interface with a navigation bar at the top. The navigation bar includes links for 'Login', 'Report List', 'My Profile', 'User Guide', and 'Logout'. Below the navigation bar, there is a 'Report List' section with a 'Tools' dropdown menu. The 'Tools' menu is open, showing options like 'Continue', 'Select All', and 'Clear All'. A red arrow points to the 'Batch Download Status' link in the top right corner of the page.

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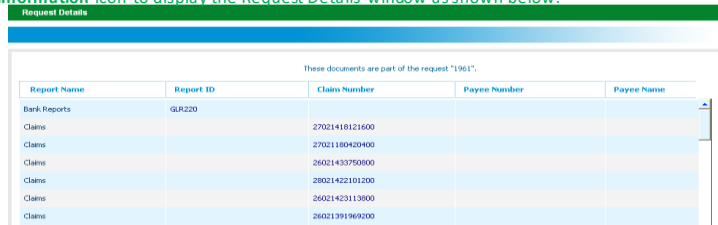
Step 8: From the Batch Download Status screen, the Request Status will change from Pending to Available.



Step 9: Click on the PDF icon to open the documents in Adobe Viewer.



**Note:** If the user would like to view the details of the requested documents, they can click on the topic information icon to display the Request Details window as shown below.



## 9 Worklist

This feature is optional based on customer requirements, and may therefore not be available for all users.

A Worklist is used to store references to documents from the Search Results screen so that a user may return to the documents later without the need to search for them again.



Worklists are created from the Search Results screen, and managed from the Worklist View. Users can have up to 64 worklists and each worklist can have up to 500 documents.

All functionalities of Search Results are supported in Worklist

- Users can include all the documents in a worklist for batch operations such as View Selected Docs, Fax, Email, etc.
- Users can copy some or all documents from a worklist to a new or an existing worklist

If a worklist has not been accessed for more than a year, then it will be purged automatically. Worklists are displayed in a drop-down list. Changing the worklist from the drop down will change the Worklist view for the current session.

**Note:** Worklist icons show the status of documents in the search results as they relate to a worklist.

-  Add this document in current worklist
-  Checkmark indicates that the document is available in the current worklist



Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	9999999010
	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
	Explanation of Benefits	SHERWIN HALL	O P HENDRICKS MD	27021418121600	9999999030
	Explanation of Benefits	SHANKA O GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	9999999060

**Create a Worklist from the Search Results Screen:**

Step 1: Click in the check boxes for the documents to add to the worklist.

Step 2: Click on the **New** link. The default title is `Untitled 1`. If Untitled 1 has already been used, the number will be incremented to the next available number.


Step 3: Click on the **Rename** link and type in the text field to create a unique title for the newly created worklist.

**Note:** Clicking on the **Save Results** link, will save ALL the search results returned from the index key criteria search into the current worklist, NOT solely the checked items.

**Add Documents to a Current Worklist**

To add documents to a current Worklist, users must access from the Search Results Screen

Step 1: Click on **Add Document** into current Worklist link

**Note:** If the document is already present in the Worklist, it is indicated by  icon.



Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
<input type="checkbox"/>	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328200	999999901
<input checked="" type="checkbox"/>	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	999999903
<input type="checkbox"/>	Explanation of Benefits	SHERWIN HALL	O P HENDRICKS MD	27021418121600	999999903
<input type="checkbox"/>	Explanation of Benefits	SHARVA G GREENWICH	HANES OB AND GYNPA	27021180420400	999999904
<input type="checkbox"/>	Explanation of Benefits	SONNY W GOODARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	999999909
<input type="checkbox"/>	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	999999908
<input type="checkbox"/>	Explanation of Benefits	WILLIAM GOMEZ	NOPAIN FOOT ANKLE SURG P	26021423113800	999999901

Document available in current Worklist


Add Document in current Worklist



**Copy Documents:**

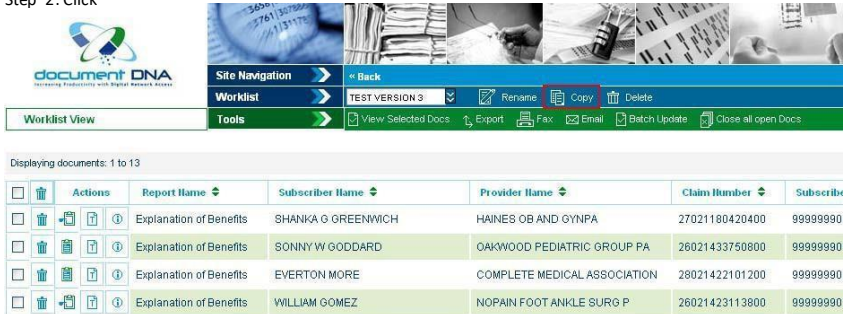
From any screen click on the Worklist View link



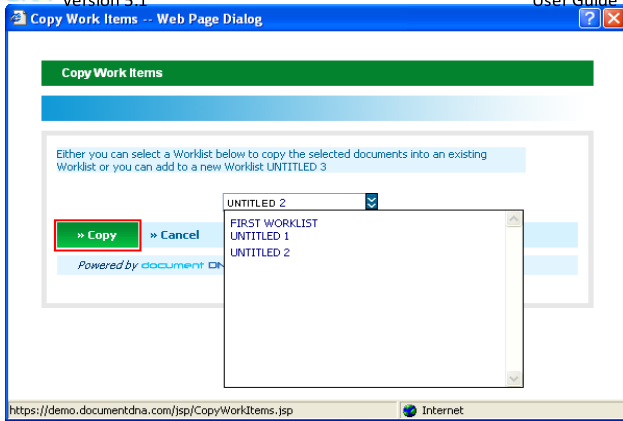
The contents of worklist can be copied to another using the  link.

Step 1: Click in the check boxes for the documents to be copied to the new worklist.

Step 2: Click 



Step 3: Choose from the existing worklists to move copies of the selected document into; or create a new worklist to copy the documents into a default titled worklist.



**Note:** Using the **Copy** option returns the user back to original worklist

Step 5: If creation of a new worklist with a default title was chosen, the user can rename the worklist by clicking on the Worklist drop down menu, and selecting the new worklist

Step 6: Click on the **Rename** link and type in the text field to create a unique title for the newly created worklist.

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Site Navigation > Back  
Worklist > TEST VERSION 3 [Rename] [Copy] [Delete]  
Tools > View Selected Docs [Export] [Fax] [Email] [Batch Update] [Close all open Docs]

Worklist View

Displaying documents: 1 to 12

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
[Icons]	Explanation of Benefits	SHANKA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
[Icons]	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
[Icons]	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	9999999060
[Icons]	Explanation of Benefits	WILLIAM GOMEZ	NOPAIN FOOT ANKLE SURG P	26021423113800	9999999070
[Icons]	Explanation of Benefits	DEVON K HEDLEY	M A HOPKINS DPM	26021391969200	9999999080

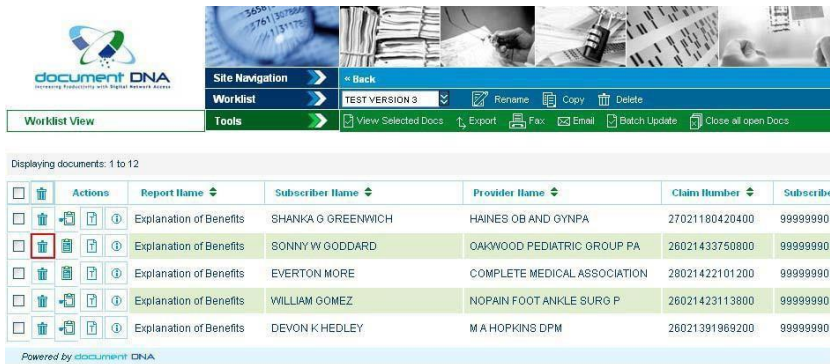
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**Delete Documents**

Step 1: Click on the  Remove this Document icon

Step 2: The user will be asked to confirm the delete

**Note:** This will not delete the physical document from the document DNA system.



**Rename Worklists**


Current worklists may be renamed from either the Search Results screen or the Worklist View.

Step 1: Click on the  Rename link

Step 2: Enter data in the text field to create a unique title for the worklist

**Delete Worklist**

Step 1: Select the worklist from the Worklist drop down menu

Step 2: Click on the  Delete link

Step 3: The user will be asked to confirm the delete

**Note:** This will not delete the physical document from the document DNA system.

