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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. A reliable filing system (no misfiles or lost documents)
b. A secure, web-based document retrieval system
c. 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.

a. Load: Loaded into the HOV Services Information Vault
b. Manage: Organized into discrete and secure databases (one per client), tracked, and audited
c. 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

Document organization in document DNA is structured to provide a secure environment at several levels: Client, Report, Document (via Index Keys), and User. This organization structure is illustrated below using a hypothetical company named “Medical Insurance Co.”

2.1 Clients

The first level of document organization and security in document DNA is segregation of data by client. Each client 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

Documents are sorted by reports as a means of separating them into logical categories. The illustration above shows examples of report categories such as Invoices, Proofs of Delivery, Bank Reports, Explanation of Payment Vouchers, Patient Records, Explanation of Benefits and Claims.
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, Account Number, etc.). Some index keys, such as “load date,” do not appear on documents but are added for internal document DNA business processes such as calculating a document’s retention / expiration date.

In the sample invoice shown below, five data fields are highlighted as practical index key choices. By specifying one or more of these values, users would be able to locate the document they require rather than broad ranges of documents.

![Invoice Example](image)

2.4 Users

In the “Medical Insurance Co” example there are three types of users: Accounting, Management Dept, and Claims Adjustors. Each user group has restricted access to either one or more specific reports.
Document organization and security are tied into the document DNA web interface design.

**Client Proprietary URL:**
Client level security and site organization is created through unique URLs, one for each Client.
Example: https://dna1.documentdna.com/(client name)

**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 Internet Explorer® and Mozilla Firefox®.

![Double-click the IE icon on desktop, or...](image)

Step 2: Access client proprietary **document DNA URL**.

![Enter client proprietary document DNA URL](image)

Step 3: Login
   a. Enter **login ID**
   b. Enter **password**
   c. Submit **login** for validation

![Welcome - Please Sign In](image)

**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 **Update** link. This will retain the updated information.

Optional: Click the **Cancel** 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:

a. During the first login
b. Every time a password expires

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).
3.3 Website Navigation

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

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.
4 document DNA Basic User Procedures

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

Step 1: Select one or more types 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, Fax, or Save
4.1 Report Access

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:** 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.

- **Explanation of Benefits**
- **Claims**
- **Invoices**
- **Proof of Delivery**

**Select Reports**

To select two or more reports, follow the steps given below:

Step 1: Click once in the checkbox to select desired reports

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

**Note:** The checkboxes are toggle switches. To remove a checkmark, click on it again.
All Reports
To select all reports, follow the steps given below:

Step 1: Click on the Select All link
Step 2: Click on the Continue link to proceed to the next page

<table>
<thead>
<tr>
<th>Tools</th>
<th>Continue</th>
<th>Select All</th>
<th>Clear All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explanation of Benefits</td>
<td>☑</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Claims</td>
<td>☑</td>
<td></td>
<td>☑</td>
</tr>
<tr>
<td>Invoices</td>
<td>☑</td>
<td></td>
<td>☑</td>
</tr>
<tr>
<td>Proof of Delivery</td>
<td>☑</td>
<td></td>
<td>☑</td>
</tr>
</tbody>
</table>

1. Click Select
2. Click Continue to proceed to the next page
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.

If multiple reports are selected, the user will see the combined index keys in a single Search screen. Index keys that are common to two or more reports will be listed only once.
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.

**Number**
- Check Number

**Date**
- Invoice Date [MM/DD/YYYY]

**Number**
- Sales Rep

**Currency**
- Check Amount

---

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

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

  **Subscriber Name**

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

  **Example:** **Subscriber Name**

  W* means that the user is searching for every Subscriber Name that begins with a “W” regardless of how many characters there might be in the name.

**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.

**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**

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.

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 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.
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 re-sort the list on any index value by clicking on the arrows in the column header.

### Default Sort Order

<table>
<thead>
<tr>
<th>Actions</th>
<th>Report Name</th>
<th>Invoice Number</th>
<th>Customer Number</th>
<th>Customer Name</th>
<th>Sales Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Invoices</td>
<td>33465</td>
<td>12345</td>
<td>Grey Oakes Inn</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>8883</td>
<td>12345</td>
<td>Grey Oakes Inn</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>53223</td>
<td>12345</td>
<td>Grey Oakes Inn</td>
<td>50</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>85684</td>
<td>12346</td>
<td>Sun's Drive Inn</td>
<td>50</td>
</tr>
</tbody>
</table>

### List re-sorted by customer

<table>
<thead>
<tr>
<th>Actions</th>
<th>Report Name</th>
<th>Invoice Number</th>
<th>Customer Number</th>
<th>Customer Name</th>
<th>Sales Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Invoices</td>
<td>65897</td>
<td>34224</td>
<td>Big Boy Restaurant</td>
<td>32</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>45332</td>
<td>34212</td>
<td>Charles Bar</td>
<td>69</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>64443</td>
<td>69321</td>
<td>Dupont Dupont</td>
<td>71</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>23456</td>
<td>12346</td>
<td>Grey Oakes Inn</td>
<td>69</td>
</tr>
</tbody>
</table>
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 **Continue**, the default Search screen appears

### 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.
  1. Index key (these will be the same default search)
  2. Relational symbols (=, <>, IN, NOT IN, LIKE, IS NULL, IS NOT NULL)
  3. 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.
  1. Index key (these will be the same default search)
  2. Relational symbols (=, <>, IN, NOT IN, LIKE, IS NULL, IS NOT NULL)
  3. 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 button to remove any changes.
Step 5: Click on the button to delete the current selected criteria in the sub-query.

Save Query:
When the criteria for the query has been completed, click on the link.

Rename Query:
To rename the query, click on the 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:
   a. Returned by search criteria for at least one index field
   b. Archived in a given date range
   c. 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
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.

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.
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

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
Step 4: If a text document, whether to remove the overlay
Step 5: Whether to Show Annotations

In the Page Range section users choose:
Step 6: All pages in selected documents(s), (merges all docs selected into one PDF)
Step 7: 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 8: Click 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**

- Select the document number to bring it into the viewer
- Click Previous page to view the page within the document
- Click Next page to view the page within the document
- Type specific page within the document and click on the checkmark to execute
- Type specific page from and to within the document and click on the checkmark to execute
- Shows pages after selecting View Pages
Close All Open Documents

To close all open documents click on the [Close all open Docs] link as shown below:
8.1.2 Text Documents with Overlays

Overlays are an optional feature of computer-generated text documents. Overlays commonly simulate the graphics or information on pre-printed computer generated reports.

**Document DNA** displays documents with overlays as the default. Users must choose to remove the overlay if they would like to view the document without the overlay.

Text page with overlay

**Explanation of Benefit Payments**

**THIS IS NOT A BILL**

<table>
<thead>
<tr>
<th>DATE</th>
<th>SERVICE</th>
<th>DESCRIPTION OF SERVICES</th>
<th>PROVIDER</th>
<th>AMOUNT</th>
<th>OVERLAY</th>
<th>AMOUNT SUBTRACTED</th>
<th>TOTAL</th>
<th>AMOUNT NOT COVERED</th>
<th>AMOUNT</th>
<th>COIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/26/14</td>
<td>DRUG STORE</td>
<td>MEDICINE</td>
<td>M A HINES, RPH</td>
<td>$52.00</td>
<td>$52.00</td>
<td>$0.00</td>
<td>$52.00</td>
<td>$52.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>07/26/14</td>
<td>RADIOLOGIST UPPER EXTRE</td>
<td>$90.17</td>
<td>$90.17</td>
<td>$0.00</td>
<td>$90.17</td>
<td>$0.00</td>
<td>$90.17</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

**TEXT PAGE WITH OVERLAY**

Text page without overlay

**Explanation of Benefit Payments**

**THIS IS NOT A BILL**

<table>
<thead>
<tr>
<th>DATE</th>
<th>SERVICE</th>
<th>DESCRIPTION OF SERVICES</th>
<th>PROVIDER</th>
<th>AMOUNT</th>
<th>OVERLAY</th>
<th>AMOUNT SUBTRACTED</th>
<th>TOTAL</th>
<th>AMOUNT NOT COVERED</th>
<th>AMOUNT</th>
<th>COIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/26/14</td>
<td>DRUG STORE</td>
<td>MEDICINE</td>
<td>M A HINES, RPH</td>
<td>$52.00</td>
<td>$52.00</td>
<td>$0.00</td>
<td>$52.00</td>
<td>$52.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>07/26/14</td>
<td>RADIOLOGIST UPPER EXTRE</td>
<td>$90.17</td>
<td>$90.17</td>
<td>$0.00</td>
<td>$90.17</td>
<td>$0.00</td>
<td>$90.17</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

**TEXT PAGE WITHOUT OVERLAY**
To view document without an overlay proceed as follows:

Step 1: Select a text based document

Step 2: Click on [View Selected Docs] link

Step 3: In View Selected Documents – Options, click on check box Remove overlay

Step 4: Click [View] link, image without overlay will display.
8.2 Export Data

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

a. Export the search results list (entire search results or selected documents)
b. 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 Export link.

Step 2: Export - Options screen will populate.

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.
Policy GLR223.PLC has been set up to extract the columns of data highlighted above and omits everything else. The procedure for exporting this data is as follows:

Step 1: Select one or more documents from the Search Results list
Step 2: Click on Export
Step 3: Set Policy options

a) Select Apply Policy
b) Include or omit column headers
c) Choose a Policy from drop down list in applicable
d) Click Export to confirm action request
Step 4: Choose from Open, Save and Cancel
This feature is optional based on customer requirements, and may therefore not be available for all users.

Step 1: Select documents to be faxed
Step 2: Click on the **Fax** link

Step 3: Fill in details for the **Fax Cover Sheet**

**Fax Single Document:**

- Recipient's name
- Recipient's Fax Number
- Request email confirmation for fax receipt. Email will be sent to the email address created in the user's profile

**Note:** When selecting a single document, users will have the option of choosing a **Range of pages** to send.
Fax Multiple Documents:

For **Address Book** instructions click the link.

**Step 4:** Review feedback window. Click **Close** button.

**Note:** Documents are sent to a fax queue. The system will make a total of 5 attempts to fax the user’s request, in intervals, until the user’s request leaves the queue. The total time for the 5 attempts may be 15-45 minutes.

If the user has requested a confirmation email, it will denote if the documents were faxed on successful task or if all 5 attempts failed. The more attempts it takes for the fax request to leave the fax queue, the longer the delay will be before receipt of the email confirmation.
Step 5: Check confirmation email

The confirmation email will have the phrase “Status NORMAL” in the subject line if documents were faxed successfully.

For each unsuccessful fax attempt, user will receive an email with the phrase “status MAXTRY” in the subject line.
8.4 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 Email link
Step 3: To set options for sending documents as attachments:

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 recipient will receive an email as shown below with a PDF attachment. Use Adobe Acrobat to open the PDF attachment for viewing.
**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 **Email** link
Step 3: To set options for sending documents as attachments:

---

**Step 4:** Click **Send**
**Step 5:** Close confirmation window

The recipient will receive an email with links to the documents in **document DNA**, one link per document.
8.5 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:

1. **Step 1:** Select the contact from the list
2. **Step 2:** Click to the **Edit** button
3. **Step 3:** Edit the applicable information
4. **Step 4:** Edit the Profile Type if desired
5. **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**

1. Select a contact from the list
2. Then click on either the **To**, **Cc**, or **Bcc**
3. Then click **Ok**
1. Select a contact from the list
2. Then click on the Fax
3. Then click Ok
8.5.1 Batch Download

Users can download a maximum of 500 pages at one time. If users would like to view a large amount 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

![Image of document DNA interface showing search results]

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

![Image of View Selected Documents - Options dialog box]
Step 5: The Batch Download Notification window will display; enter a title in the Enter request description field.

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

Step 7: The user must check on the status of the batch by clicking on the Batch Download Status link.
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.
This feature is optional based on customer requirements, and may therefore not be available for all users.

The annotation viewer is divided into three areas:

a. Toolbar
b. Document display area
c. Document information bar
## Annotation Viewer Toolbar

The toolbar includes the following icons:

<table>
<thead>
<tr>
<th>Icons</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Previous Page</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Next Page</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Find</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Find Next</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Download Pages</td>
</tr>
<tr>
<td>![Icon]</td>
<td>E-mail Pages</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Print Pages</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Quick Print</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Change View</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Format Page</td>
</tr>
<tr>
<td>![Icon]</td>
<td>View/Hide Page Notes</td>
</tr>
<tr>
<td>![Icon]</td>
<td>View Annotations</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Edit Annotations</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Close Document</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Go To</td>
</tr>
</tbody>
</table>
Image Annotation

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

Creating and Managing Annotations and Page Notes

This section contains instructions for creating, viewing, editing, and deleting annotations and page notes. Annotations and page notes are not mutually exclusive; users may add both to a given document.

Document viewing icons indicate whether there are annotations already saved to a document.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Report Name</th>
<th>Subscriber Name</th>
<th>Provider Name</th>
<th>Claim Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Explanation of Benefits</td>
<td>LANGSTON</td>
<td>CLYDE FOOT ANkle CTR. 1</td>
<td>270211301283000</td>
</tr>
<tr>
<td></td>
<td>Explanation of Benefits</td>
<td>ERIC GOODMAN</td>
<td>OCEANSHORE PEDIATRIC LLC</td>
<td>270314281363830</td>
</tr>
<tr>
<td></td>
<td>Explanation of Benefits</td>
<td>SHERRIN HALL</td>
<td>G P HENDERICKS MD</td>
<td>270314191294639</td>
</tr>
<tr>
<td></td>
<td>Explanation of Benefits</td>
<td>SHARNA O GREENRICH</td>
<td>HUNNES OB AND O INPA</td>
<td>270211854354039</td>
</tr>
</tbody>
</table>

Add Annotations

Annotations are managed in a separate window.

Step 1: Click on the **Add Annotation icon** to view the document in the Annotation viewer

Step 2: Click on the **Edit Annotations icon** to open the Annotations Properties dialog box
Note: When users move their mouse over a button, document DNA displays the associated tool tip.

Step 3: Choose the icon of the annotation desired

The Annotations Properties dialog box displays the following features.
Features include:

a. Text: Select the color, (text is disabled for Highlight)

b. Sticky note (text with choice of background fill, “0” indicates no fill)

c. Stamp (text with red boxed outline)

d. Customers may create bitmap images of a stamp to be loaded to their applications

e. Highlight (choice of overlay fill)

Note: The annotation will appear in the top right corner of the document. It can be positioned anywhere on the page by dragging and dropping to reposition. It can also be resized by dragging the lower-right corner.

Step 4: Click the Save icon to store the annotation to the document.

Optional: To delete the annotation, click the Cancel icon.

View/Edit Annotations

Annotations are managed in a separate window.

Note: Users can view information about who created an annotation and when it was created, in this process when double-clicking the annotation.
Step 1: Click on the View/Edit Annotation icon to view the document in the Annotation viewer.

Step 2: Click on the Edit Annotations icon to see the already added annotation in editing mode.

Step 3: Double-click the annotation desired. The Annotation Properties dialog box opens, enabling viewing of the current properties of the annotation.

The Annotations Properties dialog box displays the following features.

Features include:
- Text: Select the color, (text is disabled for Highlight)
- Sticky note (text with choice of background fill, “0” indicates no fill)
- Stamp (text with red boxed outline)
- Customers may create bitmap images of a stamp to be loaded to their applications
- Highlight (choice of overlay fill)
Step 4: Make changes to the annotation as desired and click on the OK icon.
Step 5: Reposition and resize the annotations as desired.

Note: The annotation will appear in the top right corner of the document. It can be positioned anywhere on the page by dragging and dropping to reposition. It can also be resized by dragging the lower-right corner.

Step 6: Click on the Save icon.
Step 7: Click on the View Annotations icon to hide the annotations.

Note: When the user changes the scale of an image page, the annotation is scaled with the image.

Deleting Annotations
To delete an annotation, perform the following steps:

Step 1: Click on the View/Edit Annotation icon to view the document in the Annotation viewer.
Step 2: Click on the Edit Annotations icon to edit the annotations already added to the image.
Step 3: To delete an annotation, select the annotation by holding down the left mouse button and simultaneously clicking the Delete key.
Step 4: Click OK to confirm deletion.

Creating Page Notes
To create a page note, perform the following steps:

Step 1: Click on the View/Edit Annotations icon to view the document in the Annotation viewer.
Step 2: Click the View/Hide Page Notes icon on the Annotation Viewer toolbar. The Page Notes window will display.
Step 3: Type the page note text in the text box and click the View Mode icon to save the note.
View/Edit Page Notes

Users may view page notes previously added to a document, but may only edit the notes they created.

Step 1: Click the View/Hide Page Notes icon to view all page notes added to a document.

Step 2: Select a note:
   a. Click on note in the window header
   b. Use the navigation buttons and to select the desired note

Step 3: Review note content in display area
Step 4: Click the **Edit page note** icon

Step 5: Make changes to the page notes as desired and click on the **View Mode** icon to save the note

OR

Optional: Click on the **New page Note** icon to begin another page note

**Note:** Users can click on the **Cancel** icon when creating a new note, or editing, to close the window without saving changes to the last note.

**Note:** Users may only edit the notes they created, but not those created by other users
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 exiting worklist

If a worklist has not been accessed for more than a year, then it will be purged automatically. Worklist 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
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 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 link and type in the text field to create a unique title for the newly created worklist.

Note: Clicking on the 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.
Copy Documents:
From any screen click on the Worklist View link

Step 1: Click in the check boxes for the documents to be copied to the new worklist.
Step 2: Click Copy
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.
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.