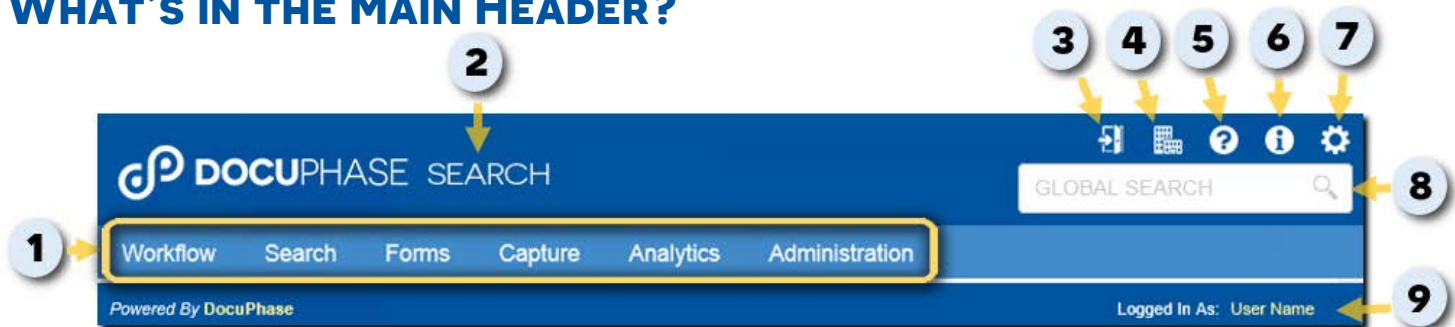



INTRODUCTION

End users of DocuPhase spend the majority of their time moving between a few specific areas within the platform. Let's take a look at these areas below and review an initial understanding of where things are and what we use them for. Keep in mind, while the items shown below are the most commonly seen, there are many more elements not shown in this document.

WHAT'S IN THE MAIN HEADER?





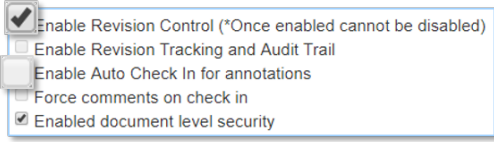




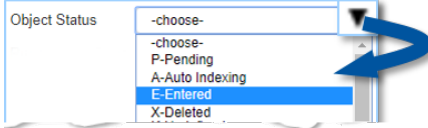













#	Definition
1	<p>Menu tabs* – When you hover over each of these tabs, a corresponding menu appears from which you can make selections depending upon the task or process you want to perform.</p> <ul style="list-style-type: none"> • Workflow – appears only for DocuPhase Progression (robotic process automation) users: allowing them to interact with their work items (i.e., documents, data, instructions, and actionables). • Search - allows you to search for documents based on their associated application. You can also save and use search queries here as well. • Forms – appears only for DocuPhase Forms users: allowing them to search for, set favorite, and complete forms. This is also where the DocuPhase Forms Manager (web forms designer) resides. • Capture – is one of the ways you can upload a document into the repository, and attach index values as metadata. It is also the area in which you can access the indexing queue (where documents go when they can't be processed by one of the auto-indexing options). In addition, some Administrative functions (mirrored from the Administration tab – see below) reside here. • Analytics** – appears only for DocuPhase Analytics (reporting tool) users: allowing them access to some standard and custom reports. This is a number-crunching reporting tool. Standard document management customers have access to some standard reports and/or custom reporting tools. • Administration – generally only appears for TPOCS and/or System Administrators: providing access to administrative functions, some troubleshooting tools, and configuration options. The functionality under this tab is covered by DocuPhase onsite certification training.
2	Navigational Landmark – provides you with an at-a-glance marker of the page/component of the platform currently being utilized/displayed.
3	Logout icon – logs you out of the DocuPhase system and releases a license and any documents you are using: making them available for another user.
4	Corporate Link – links to a webpage/website (e.g., your company website) as determined by your organization.
5	Help icon – displays a searchable, page-level context sensitive help system: meaning that the help that appears when you click on this icon relates directly to the page of the system that is displayed.
6	Information icon – links to a webpage (e.g., contact information for your company) or documentation as determined by your organization.
7	User Preferences icon - displays options to change your password, set search preferences, as well as the starting screen you want displayed upon login.
8	<p>Global Search – allows you to search every document in every application for specific keywords entered in this field.</p> <p>TIP  While a Global Search can be very useful, it requires more system resources than other search methods; therefore, it is not DocuPhase Best Practice for searching. If you know the application in which the document resides, you can do a much quicker search in the application itself. To do this, from the main header as shown above, go to Search>Application, then select the application containing the document in question.</p>
9	User Information – displays the user name of the person currently logged into the system.

**The tabs that appear when you log in may differ from those of other users. The appearance and access to various components of the system are dependent upon the permissions and security settings associated with your log in information. If you do not have access to something you think you should, contact your TPOC for assistance and information.*

***Separate licensing is required for access to the Analytics Designer that allows users to create custom data cubes for reporting.*

OTHER COMMON INTERFACE ELEMENTS

The following are some of the most common elements that appear throughout the system.

What it looks like...	How it's used...
 (unselected/disabled)  (selected/enabled)	<p>Check Boxes — appear next to specific settings or options to indicate that you can select and/or enable (or disable) more than one option at a time.</p> <p>EXAMPLE</p> 
 /  (Clear) / (Display)	<ul style="list-style-type: none"> • Clear Fields — deletes any information you have entered or selected for any fields displayed on the Search Applications screen. • Display Fields — displays a list of Indexes used in an Application. checking/unchecking these indexes will control whether or not a user can search by these indexes and whether or not these indexes appear in search results.
	<p>Configurations/Settings — appears next to items that allow you to make settings or configuration selections (e.g., on the Application Configuration page, this icon appears in both the Annotation and Index columns so that you can make changes to related settings for both of those elements).</p>
	<p>Dropdown Arrow — appears next to a field to indicate that you have a choice of options from which to choose. Once you click on the arrow and make a selection, it appears in the corresponding field.</p> <p>EXAMPLE</p> 
	<p>Edit Last Query — Once you perform a search, you can use this icon to return to the Search criteria screen that still contains the criteria you just used. You can then make changes to that criteria and perform the search again. This is great for complex searches that need refining.</p> <p>EXAMPLE</p> <p><i>Let's say you are searching for a Doc Type called "Invoices" with a CreateDate range of 2/13/2016 to 8/13/2016. However, if this criterion results in a list of invoices too long to quickly find a specific item, you can use to return to this search and perhaps change the date range to 2/13/2016 to 5/13/2016, or add Batch ID, etc. Adding more criteria to the search reduces the results returned making it easier to find specific items.</i></p>
	<p>Email selected documents</p>
 /  (Expand) / (Collapse)	<p>Expand/collapse the corresponding area of the screen to reveal more/less information.</p>
	<p>Export — allows you to export files to be imported into DocuPhase or Microsoft Excel, used as data files (CSV or XML), and/or viewed (as in the case of image files).</p>
	<p>Populate from Selected Document (same as right-click option for documents) – allows you to use a selected document as the source to automatically populate another document containing the same indexes.</p> <p>EXAMPLE</p> <p><i>This comes in handy if you are filling out monthly expense forms. Instead of having to type in the exact information (e.g., your name, contact information, title, department, etc.) month after month, you can use a previous expense form to populate the new form so that all you have to do is fill in the current information such as your actual expenses.</i></p>
 /  (Search) / (Selected)	<p>Print Search Results / Print Selected Documents</p>
	<p>Refresh Current Search — keeps you on the current screen, but refreshes the returned search result(s). This is a helpful option when a you are waiting for documents being processed or when awaiting data synchronization.</p>
	<p>Tag Selected Documents — to indicate their association with other documents: even those in different applications. In addition, you can view and select tags that have already been added to records within the system.</p>
	<p>Text Fields — appear throughout the DocuPhase platform, and can vary in maximum character length (from 10 to 200+ characters). In these fields, place the cursor in the field, then enter text (letters and/or numbers) via your keyboard.</p> <p>EXAMPLE</p> 
	<p>Toggle Full Screen — switches the view between extending or reducing the Application Pane for Search results. The extended screen allows you to view more information at one time.</p>