


No matter how much training you have, or how much time you spend working in DocuPhase, it can sometimes be a challenge to remember all the features available to help you work more efficiently. This guide offers some of the tips, tricks, and reminders that will help make your work even faster and easier.


**IMPORTANT!**

**What you see (and how you see it) in the system depends upon user and group permissions, as well as any interface customizations made to the system by your organization. Please contact your DocuPhase Technical Point of Contact (TPOC) for more information.**

## GETTING HELP

### Search Online Help (?)

From ANY screen within the DocuPhase platform, click  to display a new window containing a topic directly related to the screen on which you are working. You can also use the Help Search field to find help about other topics, as well.

### When in doubt, ask your TPOC!

Every organization has at least one certified Technical Point of Contact (TPOC) on staff. TPOCs are the first line of support and information relating to the DocuPhase Platform.

## SEARCHING

### Search without knowing a full value (Wildcard Search \*)


Use \* as a wildcard character to represent missing letters or words at the beginning, middle, and/or end of a partial word, name, or phrase. Wildcards can be used character for any type of search (i.e., Application, Global, Full Text, and/ or Advanced fields).

#### EXAMPLE

To find a document relating to a client whose last name you can only remember as beginning with "Mc". You can enter "mc\*" in the Last Name field, and find any last name that begins with Mc, such as McBride, McCarthy, McEhiney, McMurry, etc.

### Delete any information entered or selected for any fields used for searching ( Clear Fields)

### Save and share a set of defined Application search criteria (i.e., a query) to be used over and over (Saved Queries)

You can also use  to make a **Saved Query** a "favorite": enabling you to activate the query with a single click.

### Adjust the number of lines of Search Results Per Page (Records Per Page)

When the number of items in a process exceeds the preset items per page, additional pages are created to accommodate those items. You can use the page controls at the bottom of the list of Index fields on the **Search** page to change the number of items displayed per page.

## REFINING AND EXPANDING SEARCH RESULTS



### Display a list of Indexes that you can choose to include/exclude them in search options ( Display Fields)

### Use linked items to help you expand, refine, and/or reorganize Search Results (Dynamic Linking/Cross Query Search)

Hover over search result values and the text changes color, you know that this is a link you can use to filter results by that item. Then you can...

- Click a value within a column to initiate a global search based on that value: expanding the current result set to include only/all documents, in any application, with that value in any column.
- Hold the **Shift** key and click on a value within a column to narrow search results to only those documents with that same Value, in that same column, within that same application.

### Add searchable keywords to any document ( / tags)

Once you select the document to which you want to add tags, click  to display a Tag entry field; then enter the value (tag), and click  to add the tag to the document.

#### EXAMPLE

A medical practice wants to keep track of how many geriatric patients it has, how many of those geriatric patients require financial assistance, and that living will in place. Tags can be added to the documents associated with such patients (e.g., geriatric, Medicaid, will) to use for a search to find all related documents.

### Return to the Search criteria screen that still contains the criteria you just used ( Edit Last Query)

#### EXAMPLE

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 reduces the results returned: making it easier to find specific items.

## WORKING WITH SEARCH RESULTS

### Email selected documents ( Email)

### Update Current Search Results ( Refresh)



Information/Files in DocuPhase is generally being added or changed all the time so it's a good idea to update the **Search Results** screen.

### Print Search Results or Selected Documents ( Search / Selected)

### View more information at one time ( Toggle Full Screen)

Extend or reduce the **Search Results** window.

### Add, View, and Edit Notes (Add / )

Once a note has been added to a document,  appears next to the name; click  to review and/or add more notes.

### Use the right-click menu to display a list of short cuts

Edit Indexes

Download

Copy Link

Undo Checkout

Check in

Populate Form

You can right-click on a document icon in the list of Search Results to use the following options:

*NOTE*

You can also use the  (*Indexes*) option to edit Index values.

### Index the same document using with multiple values for a single Index field

Use **+** (the plus sign on your keyboard) to add multiple values within a single Index field: automatically creating a corresponding copy of the document for each entry (without having to manually submit the document for each Index value).

#### EXAMPLE

For a single invoice where multiple payments may have been applied, you could enter the check numbers in the following way: Check 111 + Check 222 + Check 333. A “copy” of the document is then created for each check number.

#### NOTE


It is highly recommended that this option be used for one Index only per document.

## WORKING IN THE ADVANCED WORK ITEM QUEUE AND WORK ITEM VIEWER

### Change the order of Columns in Your Queue

Click and drag on a column heading to move it left or right.

### Choose columns; sort and filter items in the column

Click  next to a column heading to display a list of options that allow you to hide or show available columns, sort items in that column in ascending or descending order, and/or filter the items that appear.

### View multiple documents side by side\*

Hold the **Shift** key and click on a document icon in your **Work Item Queue** to open a second window. You can then click and drag the new window to position it anywhere on your screen.



*\*This feature works the same way in both the Work Item and Document Viewers.*

## USING SCANDOX

### Clear items from the ScanDox Tray

After submitting documents into **ScanDox** you can use the **Clear All** option in the File menu to clear any leftover items from the Tray.

### Join two separate TIFF or PDF documents or split one document into two ( Split/ Join)

- **SPLIT:** select the first page of where you want the “new” document to begin, then click : resulting in two documents, one that begins on the page you selected.
- **JOIN:** Press and hold **Ctrl** on your keyboard, then click the page in each of the two documents you want to join, then click : resulting in one document joined at the selected location in each document.

#### NOTE

This can also be done by dragging and dropping between tray documents.