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About DOMA

DOMA Technologies (DOMA), is a records management and outsourced record conversion services corporation serving the automation needs of the business and healthcare community throughout the United States. DOMA provides document management solutions for paper-intensive and transaction-oriented processes, using proven and secure internet-based technologies.

With over 20 years of experience in the records management industry, DOMA was founded for the purpose of developing internet-based document management systems along with providing a full range of records conversion services. These systems and services are used to automate the process of data capture, records and document retrieval, and extended electronic storage. In more and more organizations, processes that once were paper intensive are being replaced with more efficient electronic document processes.

DOMA provides its services to customers in order to help them recognize the benefits of this advanced document technology. As the science of information technology and implementation of document and records management applications become more complex, DOMA is increasingly called upon to act as an integrator of user ideas and advanced technology. These services include leading edge solutions for internet-based records storage, document imaging, scanning services, workflow design, and records management and production.

Today, through the DOMA Suite of Applications, business documents and records from diverse platforms can be intelligently and securely placed, stored, retrieved and archived in a single secure web repository. DOMA allows you to combine all of your documents and digital assets into one secure web repository. No longer will you need to go to several desktop applications, your file cabinet or a microfilm machine. All of your records can be stored simply and cost effectively via the DOMA Suite of Applications.

In addition, DOMA has the technical ability and expertise to aid the customer in using these tools to design and implement the best solution for their needs. DOMA will recommend to the customer the best method for record and document management and conversion services, taking into consideration the customer’s specific needs. DOMA has qualified trained analysts and technicians on staff to handle all phases of the conversion and continued support.

Our mission is to provide the "HIGHEST QUALITY" and "BEST VALUE" in customer support and services, utilizing the latest state-of-the-art technologies in software applications, hardware and communications.
Configuring the Browser

The DOMA Application is accessed via the World Wide Web with a workstation, an Internet connection, and Internet Explorer. Before using the application, the workstation, its operating software, and the Internet access connection must meet or exceed basic requirements found in the Technical Support section (Appendix B) at the end of this manual.

The DOMA Application is designed to use the Internet Explorer browser. A few configuration steps must be taken to ensure that the browser functions properly. You must have administrator rights on your computer to make some of these changes. On the main page of Internet Explorer, click Tools on the toolbar at the top of the screen. On the drop down menu, click Internet Options. Changes are necessary in the General and Security tabs. In addition, the Pop-up Blocker Settings need to be modified.

On the Internet Options, General tab, do the following:

Click the Settings button. Next, click the radio button "Every visit to the page". Click OK at the bottom of the box.
To modify the security settings for DOMA compatibility, select the Security tab and do the following:

**Click on the green Trusted Sites icon and then on the Sites button.** Type or paste your DOMA URL including the “https:” header in the box and click Add. Next type https://*.domaonline.com in the trusted site and click Add. Click OK to exit the Tools box.

Finally, click the Advanced tab on Options. Scroll to Use TLS 1.0. Click on the radio button. (The minimum requirements for viewing documents requires TLS 1.0+).
To modify the pop-up blocker settings for DOMA compatibility; click Tools on the Internet Explorer Toolbar.

Click Pop-up Blocker, then Pop-up Blocker Settings. Add your DOMA URL address including the “https:” header to the list of Allowed Sites. Click Add, then Close.

Click OK to exit and then restart Internet Explorer.

**User Login**

Every customer has a specific URL to access the application. Your DOMA system administrator can provide the URL to new users. Enter the web address using Internet Explorer to reach the login page. The log-in page for the DOMA application is the first step of user authentication into the DOMA system. Based on the initial username and password log-in, the user profile is matched to the individual user rights and access within the application. The system administrator will supply each user with a User Name and may also supply a password or will have the system email the user a password that is used one time to access the system and then reset the password to a personal one. In some cases, users, will be assigned to groups that require two factor authentication either through Personal Identity Verification (PIV) cards or a code being sent to the user. In these cases the user will be notified and instructed on how to set it up on their first login.
Please Note: The encrypted user password is case sensitive. If three failed attempts to log into the system occur, the user account is locked and the user is unable to gain access into the site. Don’t worry though the site will notify the user after each failed attempt showing them how many more attempts they have. If this occurs, the user must contact an administrator or executive level user to unlock the account from the administration section within the application. The user must log-off of the application when finished with the session. The log-off button is located in the top right hand corner of every screen within the application. Failure to log-off results in the user account remaining active. When the user goes to log back into the site, this message appears: “User already logged into the system.”

After logging into the DOMA site, all users are immediately launched to the Home Page. Based upon the individual user log-in, access and functionality within the site will vary. The DOMA Toolbar across the top of the page lists the primary functions. Based upon user login permissions that were created by the site administrator, some of the tabs on the toolbar may not be available for all users. Detailed Help is always available from the main Toolbar.
The Home Page is the starting point for working with the DOMA suite of applications. There are several options available to users to quickly access features and functions of the system. The Home Page is divided into several sections to organize information more efficiently. At the top of the Home Page is the Toolbar. Key pages are accessible on the toolbar along with the searching, user preferences, help, and logout buttons. The body of the Home Page has quick user links and tools in the left column and system announcements and configurable widgets on the body of the page.

Home

Home allows the user to quickly access the advanced search page and the Add Entities/Documents page. The advanced search page can be accessed from any page in the site by clicking on the 'Advanced Search' button in the top toolbar. Entities and documents can be added from any search page, but the 'Add Entities/Documents' page lets the user see all entity and document types that they have permission to. From there the user can scroll through the options until they find the correct type that they want to add.

Tools

The Tools section is for links to the DOMA Imaging App (DIA) and an install link for the standalone version of DIA. See the “DIA” section for an explanation on how to install and use this tool. DIA will be opened every time a user checks out a document or entity.

Tasks

Tasks are user or system assigned jobs that a user must complete. They range from simply populating a custom field to assigning a relationship and sending an email. Tasks are an organized way for users to work inside of the DOMA site. Tasks are created from workflows that are set up by site administrators and managed by supervisors. See “Workflow Tasks” for more information.
Saved Searches

Saved searches shows searches that have been saved by the current user, as well as searches saved for the Group(s) of which the user is a member. These dynamic saved searches allow rapid access to record sets for efficient workflow. Clicking on the link presents a current search list matching the saved criteria. Email alerts can be created to notify a user of a change of status in the search. Saved searches are created after a search is performed. The steps to create saved searches are described under “Searches.” User created saved searches can be edited by going into the search and selecting the update button. They can be deleted by going to the user preferences page then selecting saved searches. Group created searches must be edited or deleted by a site administrator in the Admin console page.

<table>
<thead>
<tr>
<th>Saved Searches</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient - Allergies (8)</td>
<td></td>
</tr>
<tr>
<td>Test Doc (12)</td>
<td></td>
</tr>
<tr>
<td>Test Group Search (47) testing (16)</td>
<td></td>
</tr>
<tr>
<td>Performance Test (96)</td>
<td></td>
</tr>
</tbody>
</table>

Links

Links are created by the user or site administrator to allow one-click jumps to other web sites. Group based links are created in the Site Configuration area under the links tab. User specific links can be created and edited under user preferences links tab. Links can be set up to pass login information to another site.
Finding Documents

Basic Search

The Basic Search function appears on every screen of the application in the upper right hand corner. The Basic Search option gives the ability to retrieve documents based on the primary index field of the site as well as the entity/document ID. These searches can include numerical, alphabetical, and wildcard (*) characters depending on the index. (For example, *123* returns all records that have 123 within the index searched). Once a value is added, click on the magnifying glass button and a search results ‘hit list’ is displayed.

Advanced Search

Access the Advanced Search function by clicking Advanced Search on the DOMA Main Toolbar. The Advanced Search option allows searching on one or more of the custom field criteria of an entity/document. (A custom field is a defined field like “Name”, “Date of Birth”, or “Address”). These searches can include numerical, alphabetical, and wildcard (*) characters depending on the index.

For complicated searches the user can select the dropdown arrow next to “AND” to create Boolean searches with “OR”. To further refine a search the open and close parentheses buttons can be used. The dropdown field with “Name” currently in it holds all the custom fields for that entity/document type. The dropdown field with “Equals” changes based on the type of field selected in the “Name” box. However, the basic options are:

- **Equals**: search returns values equal to the request
- **Not Equals**: search returns values excluding the values in the request
- **Greater Than**: search returns values greater than the request
- **Greater Than or Equal**: search returns values greater than or equal to the request
- **Less Than**: search returns values less than the request
- **Less Than or Equal**: search returns values less than or equal to the request
The third box is where the final search value is entered - it may be a pull-down menu or a text box or a dropdown calendar depending on which index is selected. To search on more than one index (such as Name equals Smith and Date of Birth is greater than Jan. 1, 2000, click on the “+” button to select more indexes. Once all values are filled in, click on the search button to see a search results screen with a ‘hit list’ based on the associated search criteria. If no records are found nothing appears below the task tabs.

Search Results Screen

Once a ‘hit list’ is returned, a variety of tasks can be performed from the search results screen before the document is opened. Depending on the user profile, a row of functions for moving documents, deleting documents, and printing are displayed for each result. In addition each column can be sorted in ascending or descending order by clicking on the associated index header within each column.

The Search Results Screen has its own toolbar that permits the user to manipulate groups of documents or records as well as export the search results. The Search Results Toolbar functions are described below.

Save

The Save button next to Search allows for the creation of saved searches for future retrieval (for example a frequently used folder or documents selected by criteria, i.e.—date of birth greater
than 8/1/2000). Saved Searches appear on the Home Page in the left navigation menu. When new records are added, or deleted from a saved search, the user can be notified via email.

To create a saved search, perform a search with the parameters needed to produce the desired results. Click Save under the search criteria. The user is then redirected to another page that prompts the user for a name to label the saved search. Saved search names should be descriptive of the search. From this page the user can also sort the search by a custom field, enable email notifications, make it a group search, and publish the search. Publish should always be selected. Once finished select Save or Cancel and the user will be sent back to their search results.

**Save Search**

<table>
<thead>
<tr>
<th>Search Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Sort</td>
</tr>
<tr>
<td>□ Enable Notifications</td>
</tr>
<tr>
<td>□ Save as Group Search</td>
</tr>
<tr>
<td>□ Publish</td>
</tr>
</tbody>
</table>

**Email Alerts**

Creating a saved search also allows the user to receive an email alert (notification) when the result of a saved search is changed. For example, if a new record is added (scanned or uploaded) that fits the criteria of your search, the saved search created is augmented by that new record. The new number will be displayed on the Home Page next to the saved search and an email notification of this addition will be sent to specified email addresses.
Check Enable Notifications, and complete the remaining boxes to receive email alerts. Email notifications can be customized to be sent based upon addition, deletion, or both. Add, Delete, or Add and Delete can be selected from the Type drop down menu. When a new document is added, or deleted to the saved search, the user will be notified with an email from DOMA support. The email will not contain specific custom field information, but will tell the user what action occurred and provide a link. The link will require the user to login to DOMA to see the new search results. An email notification looks like this:

PLEASE DO NOT REPLY TO THIS EMAIL
Search results for search 'Saved Search Name here' have changed:
- 3 documents have been added

https://yourDOMA-URL/searchresults.aspx?searchID=40
Regards,
DOMA Support Staff

The user can set how often the Saved search is checked for changes. Setting the time to a short span can result in multiple emails if many documents are added or deleted over the specified time-period. Setting a longer interval, perhaps an hour or more, will send a single email alert with the number of specified changes made in an hour interval. Multiple email addresses are permitted for the same notification.

A user with sufficient group rights can save a link for an entire group by checking the Save as Group search box. Select the appropriate group and the link will appear for the entire group on the Home page. If the person creating the Group Saved search is not a member of that group, the link will not be displayed on the Home page of the creator. Group saved searches can only be deleted and managed by an administrator in that group on the Admin page. To manage saved searches created for a group, the administrator must use Manage Group Saved Search from the Admin page.

If notifications are not needed, click publish then Save at the bottom of the box without checking Enable Notifications.
Adding Documents

Search Results Toolbar

| Add | Add Relationships | Move Folder | Check Out | Edit Fields | Delete | Export |

**Add**

Allows the user to quickly add a document of any type. Once selected a modal dialog window (a popup) will appear and will look just like adding a document anywhere else on the site. When complete the user will be returned to the search that they just left.

**Add Relationships**

A user must first select a row so that it is highlighted and the checkbox is checked then click the “Add Relationships” button in the toolbar. From this popup, the user can add and remove relationships to other entities and documents. Relationships must first be configured under Site Configuration Relationship Types. When finished the user will be returned to search results page they just left.
Move Folder

The Move feature allows records to move from one folder location to another folder location. The move process is very simple and easy to navigate once a record or records are checked and the move button is selected.

Once the move button is selected, a window showing the records selected and their current folder appears. Underneath this data table is a dropdown menu of all the folders the user has rights to. From here the user can expand the folder structure tree. Clicking the name of the desired destination folder selects that folder. Once the Move button is selected, the document moves into that highlighted folder and the Move Document window closes. Click the cancel button or “x” to close the Move Document window without performing the move function.

Check Out

The checkout option allows for users to checkout several documents at once. Cutting down on the number of trips a user must take to the search results page. Checking out a document will open it in DIA, if DIA is not already open a new instance will be created.

Edit Fields

This button allows users to select multiple documents up to 20 and edit their fields at the same time. Since not all fields are the same this button opens a window that is slightly different from the normal edit fields window. Each field is greyed out with a checkbox next to it. To edit a field the user must select the checkbox and then edit that field. Only fields with a checked box will be edited on all the selected documents.
Delete

If the user has security rights to delete a document, clicking this button deletes any documents that have been selected by checking the select box/selecting the row.

Export

An Excel spreadsheet containing all the search results will be created allowing the user to open or save it.

Search Icons

On the search results screen, there can be up to eleven icons located next to each individual record that is listed. The icons trigger actions that include expanding related documents/entities, selecting the record, viewing the record, edit the custom fields, viewing the journal, checking out the record, manage relationships, export the record, delete, view audit history, and print.

(Listed as shown from left to right)
Expand Relationships Icon – Displays the related documents/entities if there are any. Otherwise, the user is given the option to add an entity/document if a relationship type exists for it.

Viewer Icon – Shows the type of document that the record is (e.g. pdf, tif, word, etc.). Launches the document in the DOMA Imaging App Lite (DIAL). DIAL displays only TIF and PDF images. If the document cannot be opened with DIAL, the native program (if known) will be opened if it is present on the user’s workstation. The native icon might be the Microsoft Office Word or Excel icon or others.

Edit Icon – The pencil is used as the universal edit icon throughout DOMA. It allows the user if they have the rights for the record to open another window where they can edit the custom fields, relationship, journal, and folder of the record.

Journal Icon – Clicking on the closed book opens a popup window where a user can view, add, and edit notes for the record. Messages in the journal will display the time of entry, the user, and the message. A book icon with blue lines on it indicates that entries have already been made. Journal entries include text written by the user, a date time stamp when the entry was made, and a user name. Above the table showing this information will be Add and Export buttons to add an entry and export all entries respectively.

Check-Out/In Icon – The document can be checked in/out of the system. Checking out a document allows the user to edit it in the DOMA Imaging App (DIA). A second icon with a red arrow indicates the option to Undo a Check-out. A document remains Checked-Out and unavailable to others for editing until it is Checked-In or Unchecked. The user who checked the document out must make sure it is returned to the repository by clicking on the red arrow or by checking the record back in through DIA. An Administrator can Check-In a document that has been Checked-Out by another user. Checking the Audit History will show who has checked out the record.

Manage Relationships Icon – Opens a window where a user can view, add, or delete any relationships that a record has. To add a relationship that record type must first have a relationship type created for it. Clicking Save will save the changes and send the user back to the search results page. The user can click Cancel or “X” to exit back to the search page without saving any changes.

Export Icon – Exports a copy of the record in the format it is stored in DOMA as (e.g. pdfs are exported as pdfs).

Delete Icon – If the user has the correct rights they can delete individual records.

History Icon – Displays the complete history of the document. The Audit History shows each check out, view, and change to the document along with the associated user. Earlier versions of the image of the record can be viewed under the Image History tab. Similarly, all previous custom field values can be viewed under Data History. DOMA Technical Support can be contacted to restore earlier versions of a document if needed.
Accessing Documents

Viewing and Adding Documents

Documents can be displayed in two different viewers. The first, the DOMA Imaging App Lite (DIAL), presents a quick view of the document and its custom fields. It is accessed by the viewer icon on the Search Results screen. This viewer is used most often to check the contents of a previously scanned document. The second method uses the DOMA Imaging App (DIA). Checking out a document or Scanning a document uses this viewer. This viewer is used to add or manipulate a document image or custom fields. The user can add and delete pages, add more pages or documents, or annotate a document with this viewer.

DOMA Imaging App Lite (DIAL)

DIAL is usually accessed by clicking on the little document icon on a Search Results list. DIAL is the default option when viewing documents from searches. It allows the user to quickly see all pages (particularly big documents) and see it’s associated custom fields and their values. Pages cannot be deleted nor can the image be changed within DIAL. However, custom fields can be edited. Custom fields will display on the right side of DIAL. If a user leaves the mouse cursor over any of the toolbar buttons for more than two seconds, a tool tip message will appear displaying the function for that button. The ability to print and export is a function that can be turned on/off by the administrator. DIAL is shown below.

* Appendix A has a detailed explanation of each button in DIAL.
DOMA Imaging App (DIA)

DIA features all the functionality offered in DIAL and adds scanning and editing capability for image documents. DIA is accessed when the user checks out a document by clicking on the checkout icon on the search results or by clicking DOMA Imaging App under Tools on the Home page.

DIA opens in a new application window directly on top of the Home Page or Search Results list. The window can be fully expanded by clicking the Windows button in the top right corner. To scan in a new document, select the Scan button which if the twain drivers are set up correctly will scan in the record to the viewing pane. Once the user is satisfied with the image and the custom fields are filled out they can select Add which will open another program within DIA. This program is the DOMA File Upload Manager. When finished the Upload Manager window (see the bottom of the image below) will show the pertinent information regarding the upload. The Upload Manager is required to add records to the DOMA repository.

The DOMA File Upload Manager does not need to remain open to upload documents, it is there for reference. When the document is finished uploading it will disappear from the viewing pane in the middle of the image above. See the section below for more information about the Upload Manager.
Scanning a Paper Document

The DOMA application will work with any almost scanner that has the manufacturer’s supplied TWAIN driver installed. Connect the scanner to the workstation prior to accessing DOMA and follow the manufacturer’s instructions to install the driver. Upon successful scanner installation, login to DOMA and open DIA or open DIA from the desktop icon if the stand-alone version is installed.

If using the application and scanner for the first time, press the black arrow next to the Scan icon to choose the connected scanner (Select Twain Source). Next, click to select Scanner Settings. Users may select options such as the DPI setting, lightening or darkening, or skip blank pages. These and other features are passed directly from the scanner’s manufacturer’s driver software. Each scanner will have its own menu for making feature selections. Typical suggested scanner settings are: black and white; page size = auto or letter; 240 or 300 dpi; skip blank page; scan ahead; and standard feed. It is important to select black and white as well as the appropriate Dots Per Inch (DPI) so that files do not become excessively large for transmitting and storing. DOMA Support may be able to offer suggestions and assistance with some settings when requested. Scanner settings will persist until changed by the user, but it is a good practice to check them at the beginning of the work day. The first option from the drop-down arrow allows the user to toggle the scanner dialog on or off. Most users elect to not have it on so that document scanning does not require “OK” responses from the scanner.

Place the document(s) to be scanned in the scanner tray. Clicking on the Scan icon (just the picture) will automatically cause the scanner to begin processing paper to images. As the individual pages of the file are scanned, the images appear as thumbnails on the left (if thumbnails are selected under View). Once the file is finished scanning, the user can verify the image, move pages, or scan additional pages by highlighting a thumbnail to view the page in the large middle viewer area. To scan other pages, select the desired position on the thumbnail viewer, select the arrow next to Scan and the options to insert at the end, before, after, or replace the selected thumbnail are available. If the custom field pane is not visible, click on View > Properties. If they are still not displayed the properties pane maybe collapsed, just select the rightmost edge and drag it to the desired distance. Once the user is satisfied with the document, the custom fields are entered to the right of the viewed image. Custom fields can also be completed after the document is scanned. Clicking the Add button under the custom fields, temporarily stores the image(s) locally (all cached paged and logs are encrypted for safety), and then passes it to the DOMA File Upload Manager for secure transfer to the DOMA storage area (repository). The screen clears and the user can begin scanning a new file.
Toolbar icons are very like those found in DIAL but there are more icons and additional functionality on the DIA Toolbar. The Scan, upload, and image correction icons are only found in DIA and are described below. A full list of DIA icons is found in Appendix C. The list below offers the most common choices and directions for using them.

The Load File icon permits the addition of images directly from the local workstation. This is an easy way to merge several desktop pdfs into one document. A saved image can be added to a document that has been scanned and is in DIA. There are options to place the images before or after highlighted thumbnails in the Viewer by clicking on the drop-down arrow. DIA supports many different image formats including, but not limited to most standard imaging formats (TIF, PDF, JPG, JPEG, JBIG, GIF, BMP). Users have the option of loading a new document, or loading a document to replace, append, or insert to a current document. (See “Upload from Toolbar” for more information)

Deskew, Border Removal, and Despeckle allow the user to clean up an image. Deskew orients the highlighted thumbnail image to a straight edge. Border Removal removes dark edges around the image. Despeckle decreases random dots on the image.

*Deskew, Border Removal, and Despeckle make minor changes and can take several seconds to complete. Clicking these icons multiple times in rapid succession may cause the application to freeze. Click once and wait for the image to adjust before repeating the action. NOTE THAT DESPECKLE WILL REMOVE COLOR.
Annotate Documents

Annotate icons are visible to users who edit document images. The icons must be selected from View for them to appear on the toolbar. To use the annotations simply click them then move the mouse to the image (make sure the correct page is selected) and click again. Once the annotations are put on the right page they can be manipulated to the correct size or location. To delete the annotation, select the annotation image, right click and select delete annotation. Pressing the keyboard delete key will also work if the annotation is selected (double check every time).

Once annotations are made and the document is added or checked in to the repository, the annotations are permanent on the current image. If a document is added to the repository without annotations, checked out and edited with annotations, then checked in, the history will retain the original version but the current image will have the annotations moving forward.

![Annotate icons](image)

The first 2 icons are pointers, the first selects a single annotation object on the viewer; the second (dotted box) selects a group of annotations for moving or deleting.

![Pointer Mode](image)

The digital signature option allows for the user to sign the record with a certificate from their workstation. For example, if the user has a PIV card they can then sign the record with that certificate, which will be date stamped.

![Digital Signature](image)

The Rubber Stamp icon will place one of the following options on the image: Confidential, Draft, Final, Approved, and Denied. Alternative text can be requested from DOMA support.
The yellow sticky note and the text box perform similar functions—enabling the user to add comments to the page. After creating the text area, right click the mouse to change the font. The font will change without highlighting previously entered text.

These icons redact (black out) the area selected by the user by dragging the mouse. In black and white mode, there is no difference between the outlined rectangle and the blackened rectangle. Both will hide selected portions of the image. The Highlight icon places gray highlighter over a specific area, if using color the highlighter color can be picked by right clicking it same with the other icons.

The Split Document is a button under the custom fields table that provides a way to create a new document from selected pages of the current document. Select the thumbnails of the pages to include in the new document by using the mouse or arrow keys. For multiple pages, use the Shift Key for sequential pages or the Ctrl Key for non-sequential pages. After choosing the thumbnails, click the Split Document icon. A popup will appear asking for confirmation of the split. Click the Yes button to proceed or the No button to cancel. A new document is created with the same properties and folder location as the current document.

Located under View is the Upload Manager—the tool that places the images in the secure repository. The Upload Manager tool launches automatically when uploading a record.

Function keys are generally located at the top of the keyboard and are labeled with an F followed by a number, such as F1 or F2. Shortcut Function Keys are:

- F2 Scan a document
- F7 Show or hide thumbnails
- F8 Show or hide document properties
- F9 Show or hide the TWAIN dialog
- F10 Add document

The Delete key is also a shortcut to removing pages from the Thumbnail Viewer.
Editing a Document

Documents can be edited in a multitude of ways depending on how the user wishes to edit them. The options are DIAL, the edit icon, or through DIA. In DIAL the user can see the images and the custom fields allowing them to verify that the fields are correct. If the user already knows what the fields should be they can use the edit icon (pencil) to edit just the fields. If the user needs to edit the image of the record they can check out the record and manipulate the image and custom fields. In all cases the ability to edit the custom fields is not restricted if the user has the correct rights.

Restoring a Document

The DOMA system never modifies the original document. When a document is updated in the system, the version number is incremented (for example, 1.0 to 1.1). The user is prompted if they want to check in records with a new version number if the image has been manipulated. If the user selects “yes” for a new version, the number is incremented to the next whole number (for example, 1.1 to 2.0). If the user selects “no” the number is incremented by a tenth (for example, 1.1 to 1.2). Versions can be viewed on the Search Results toolbar by clicking the History icon, then either Image History or Data History depending on what is required. Earlier versions can be restored to the active view by contacting DOMA Support.

Upload Manager

All newly captured documents are cached locally, managed, and securely transferred to the DOMA repository by the DOMA File Upload Manager. Users can monitor the status of records uploaded to the DOMA application in real-time via the DOMA File Upload Manager user interface. Additionally, the application can be exited until needed. The Upload Manager is required to add new records to the DOMA repository.

While scanning documents, Upload Manager (not Upload on the main toolbar) is accessible from View. If many documents are scanned in rapid succession, there may be a queue of those documents displayed in the box. Upload Manager remains active until DIA is closed. It is the scan operator’s responsibility to verify all files have completed uploading prior to DIA closing. Error files will attempt a reupload upon the next launch of DIA if the computer is not shut down. Or the user can manually do so by selecting Tools > Resend Error Files.

Upload from the Toolbar

The Upload command on the main Toolbar in DIA enables users to send or upload other electronic files directly from the workstation. If a file is not a .TIF or .PDF type document, the native application on the user’s PC is launched to view or edit the requested file. For example, the user can
upload and save a Microsoft Word document in the repository, but it cannot be viewed in DIAL or DIA; instead the user is prompted to launch Microsoft Word. To begin the process of uploading an electronic document, the user selects Upload from the DOMA Toolbar.

Enter all the associated custom field data for the document as well as the DOMA destination folder. Once the custom fields are entered or before, the user selects the Browse button to look for any file on the local PC or network drive. File size should be less than 100MB for direct upload to the repository. After the file, has been successfully uploaded the user receives a confirmation message stating that Document Upload is completed.
Administration

The Administration area has four links to tools to manage Users, Groups, Group Saved Searches, and Alerts. The Users link will redirect the user to the User Management page where they can add, edit, or delete users. Similarly, the groups link does the same thing except for groups. Group membership can also be managed from this page. The group saved searches link allows the user to edit or delete group saved searches. Alerts allow for the creation and management of alerts that send an email to a specified address when the stated event occurs. It is vital that a site administrator fully understands the importance of each component on the Administration page. Careful attention is particularly important when setting up first time users and groups. For example, users cannot be created before groups and group creation is an essential security component. DOMA makes every effort to work with customers to understand the business needs of the customer so that the application is created with the users and groups that will enable controlled access and functionality.

Users

The Users link allows a Site Administrator to add, edit, delete user information, or to reset a user password. There are three main actions on the Users page.

Add - To add a new user, click Add from the taskbar and enter the new user information. It is helpful to adopt a standard for user names, such as first initial and last name or some other convention that is familiar. An email address is required for each user. Email addresses are a mechanism for password retrieval as well as identification. If the radio button for random password generation is clicked, the user will receive an email with a unique password that will permit login to the site and allow the user to create a personal password. Please note that temporary passwords are only good for 24 hours. User passwords must be 8 to 40 characters, with at least one upper case letter, a number and a special character such as !, @, #, $, or %, and cannot have been used previously for four times (This number can be adjusted for each customer site). A site administrator can assign a user password but it must follow the previous security guidelines. If the site administrator assigns a password and wants the user to keep that password, uncheck the Force user to change password at next login and check Password cannot change.
**Force user to change password on next login** - Selecting this box will force the user to change their password upon the next login. The user must change their password before access is granted to the application.

**Password cannot change** - By selecting this box, the user will not be able to change the current password.

**Allow Multiple Sessions** - Selecting this box will allow multiple instances of the same user account in the system. It will allow a user account to login to the application even if the account is currently Active.

**Groups** - Considerable thought must be given before adding users to groups. Groups control the activities and many of the security features of the application. The site administrator usually works with DOMA prior to site setup to initially define groups. A user should only belong to one group. Only a DOMA Support user will have access to the EdomaAdmin group.

**User Folder Permissions** – Folder permissions are handled at the group level but if a user requires special access they can be granted it here.
**New User Button** – If multiple users are being created at the same time this button will allow the site administrator setting up the users to quickly and easily move from user to user. Selecting this button will create the current user and clear the page allowing the site administrator to simply fill out the user information again.

**Edit** – On the Users page a user’s profile can be edited by selecting the edit icon (pencil) next to the desired user. Users can be found using the filter bar and the column headers can be sorted by ascending or descending to aid in the sorting of large amounts of users.

![User Information Form]

**Reset User Password** – To reset a user’s password, select the edit icon for the user and select the Reset Password button. The reset page will then appear that looks and acts like the password section from the create user page.

![Reset Password Form]
Locked - If the Locked box is checked, the user account password was entered incorrectly more than three times and the account was locked for security purposes. Clearing this check box and clicking the Update icon will remove the locked status of the user account and reset the locked count to zero.

Active - If the Active box is checked, the user account is active and logged into the application. Clearing this check box and clicking the Update button will reset the login status of the user account.

Force user to change password on next login - Selecting this box will force the user to change their password upon the next login. The user will have to change their password before access is granted to the application.

Password cannot change - By selecting this box, the user account will not be able to change the current password.

Allow Multiple Sessions - Selecting this box will allow multiple instances of the same user account in the system. It will allow a user account to login to the application even if the account is currently Active.

Groups – The user can be assigned to a different group. It is important that a user is assigned to the correct groups. Assignment to multiple groups will grant the user access to the best permissions from the selected groups. This can create user rights conflicts that may result in a user having more privilege than desired.

Delete - To delete a user account from the main user page select the user in the list or search for the user and click Delete (the red x). Once a user is deleted, only DOMA technical support can reactivate that user. If the user may need access to the site at a later time, locking the account or resetting the password is an alternative to deleting the account.

Manage Groups

Group membership is essential for managing security and access. Manage Groups is found under Admin on the main toolbar. It is used to add, edit, delete a group or copy a group. This is one of the most important administrative tools within the DOMA application. Careful consideration should be given to current workflow processes and access to records. Creating groups properly can protect data by allowing functional rights to particular group members and denying those rights to others. For example, a group called Scan might only allow the Add permission to input documents into the DOMA repository. A Coder group may have permission to edit a document, but not add documents or delete them. The structure of groups and folders is very dependent upon how users work with documents. DOMA assists customers with site setup to help outline best practices when using Administrative tools. The Admin section also has a link to managing group searches. A user can belong to any number of groups so careful planning is required to align group functionality and user assignment with the business and security processes for the site.
Adding a Group - Click Add to launch the Add Group Page (see Manage Group Settings). To add a new group, enter the new group name in the Name box. Under Name, the number of days before password expiration can be. Here is also where Two Factor Authentication is set. DOMA currently offers Google Authentication and Personal Identity Verification (PIV) card as options. Select the desired group permissions as well as rights for specific custom fields, Entities, documents and folders. Group permissions are given by checking the appropriate boxes in the gray area. Once the appropriate settings have been configured, click the Add button. Details for the selections are listed below.

Editing a Group - To edit a group, select the group in the list on the left and make changes to the selected group’s permissions. Click Save from the taskbar to make these changes. Details about each selection are below.

Copy a Group – To copy a group and all its associated permissions select the copy icon (the page icon). This feature was implemented to make group creation quicker and easier for site administrators.

Deleting a Group - To delete a group, select the Delete icon (red x) next to the desired group. A group cannot be deleted if it has users.

Manage Group Settings

Groups can be managed either when first created or at a later date by selecting the edit icon (pencil) next to the desired group. The user will be presented with the screen to the left. Note this is the add group screen, but it is exactly the same as the edit screen except for the buttons at the bottom.

Password Expires (days) - Specifies the number of days until group members are required to change the individual’s password.

Two-factor Authentication – Any members of this group must go through two-factor authentication whenever they logon. DOMA currently supports Google Authentication and Personal Identity Verification (PIV) cards for two factor authentication. (See the Two-Factor Authentication section for more information)

Default Folder - Specifies the default folder location for added documents for members of the assigned group.
Group Roles:

**Admin** - Allows group members to access the selected Management tools on the Admin page. If nothing is selected for this section, the Admin tab on the main toolbar will not appear.

**Home** – Allows for members to access functionality on the search results page and for record management. (See the image below) This functionality includes access to the journal, print/export of records, saving a search, task management, and searching.

<table>
<thead>
<tr>
<th>Select/Deselect All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read Journal</td>
</tr>
<tr>
<td>Write Journal</td>
</tr>
<tr>
<td>Updatable Journal</td>
</tr>
<tr>
<td>Export Documents</td>
</tr>
<tr>
<td>Print Documents</td>
</tr>
<tr>
<td>Save Search</td>
</tr>
<tr>
<td>Unassign Task</td>
</tr>
<tr>
<td>Process Workflow Task</td>
</tr>
<tr>
<td>QA Workflow Task</td>
</tr>
<tr>
<td>Basic Search</td>
</tr>
<tr>
<td>Advanced Search</td>
</tr>
<tr>
<td>Undo One and Done Field</td>
</tr>
<tr>
<td>Save / Next</td>
</tr>
</tbody>
</table>

**Reports** – Allows for members to create, run, and manage reports. If no options are selected users of this group will not be able to see the Reports tab on the main toolbar.

**Config** – Let’s members manage custom fields, document and entity types, relationship types, folders, dashboard and workflows. Similar to the other tabs if no options are selected the users of this group will not see the Config tab on the main toolbar.

**User Prefs** – Allows for members to manage their own personal settings.

Users and Permissions:

Here is where users can be added or removed as well as permissions for custom fields, entity and document types, and folders.

**Users** – This area is for the management of users in the group.

**Custom Fields** – Used for controlling the view, edit, and add permissions for each custom field on the site.

**Entity Types** – Used for controlling the view, edit, and add permissions for each entity type on the site.

**Document Types** – Used for controlling the view, edit, and add permissions for each document type on the site.
Folders – Displays a hierarchy of the folder tree structure where group permissions for view, edit, edit image, add, delete, and move can be set for each folder.

Manage Group Saved Searches

The Manage Group Saved Searches page is used to edit and delete group level saved searches that the user has access to. The order in which the searches appear on the Home screen can be altered here by selecting the group and clicking the up or down arrows to the side of the table. If the user does not wish to keep the changes made to the order they can click the revert button under the arrows. For groups that have a large amount of saved searches the filter bar can be used to quickly find the desired search.

Edit – To edit the search select the edit icon (pencil) next to the search name. The user will be redirected to a page similar to the one used to setup the search (see below). From here the user can edit how the search is sorted, add or remove notifications, add another group to the search (note the if the last group is removed the search becomes a personal saved search of the user who created it), and decide if they want the search to be published for users to see. If publish is not selected the saved search will not show up on the Home page of the users for the selected group or the user who created the search.
**Delete** – To delete a search select the red x next to the group that is being deleted. Once clicked a popup will appear asking the user to confirm that they wish to delete the search. This is an opportunity to make sure the correct search is being deleted.

**Alerts**

The Alerts page is used to add and delete alerts. Alerts are notifications that a user can setup so that when a specified action occurs they are sent an email. There are 200+ actions to choose from when setting up an alert.

<table>
<thead>
<tr>
<th>Action Description</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Removed a User from a Group.</td>
<td><a href="mailto:test@domaonline.com">test@domaonline.com</a></td>
</tr>
</tbody>
</table>

**Add** - To add a new alert select the add button. The user will be redirected to the screen below. From here the user can navigate through the options or use the filter option if they already know the action they want to watch for. An email address is required for alerts. Once completed select Add to save the alert or Cancel to escape the page without saving the changes.

**Delete** – To delete an alert simply select the red x next to the desired alert. Like when deleting a saved search, a confirmation popup will appear.

**Site Configuration**

The Site Configuration (Config) area has links to pages to manage custom fields, entity types, document types, relationship types, folders, and site management options. On each page the user will be able to add, edit, and delete the respective option. DOMA makes every effort to work with customers to understand the business needs of the customer so that the application is created with the users and groups that will enable controlled access and functionality.
Manage Custom Fields

The Manage Custom Fields page allows an administrative user to Add, Edit, or Delete a field from the DOMA system. The administrative user also has the option to change the order in which the fields appear similar to the group saved searches page.

Adding a Custom Field

To add a custom field the user clicks the Add button from the Manage Custom Field page. The Add custom field page will be displayed and will request the following information. Once completed the option to save the field and immediately start creating another field, save, or cancel can be selected from the bottom row of buttons.

Field Name - The field name or description for the field to be stored in the database, spaces are not allowed (for example: SSN, PatientName, or DateofBirth).

Display Name - The display name or description for a given field, this the name that users on the site will see (for example: SSN, Patient Name, or Date of Birth).

Type - The data type for the given field. Available data types are Boolean, Date Time, Money, Integer, Float, String, List box, Dropdown, Calculated String, Julian Date, Date Diff, and Julian Date with Sequence. Regardless of the type there will be a note, default value, and validator section.

Notes – A section for the user to add any notes about the field. Additions here will show as tooltips for the field when hovering over it on a record.

Default Value - Specifies a default value for a given field, appears for every non-calculated field.

Date Range Validation – For Date Time fields a minimum and maximum date range can be specified.
**Custom Fields** - Specifies the fields to be used for calculated fields.

**Sort Order** - Specifies the order/position of the field.

**Group Permissions** - Specifies which groups will have view, edit, and add rights to the field.

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**Manage Entity Types**

The Manage Entity Types page is used to add, edit, and delete an entity type. DOMA’s use of entities is flexible and robust, but most customers use them as a way to group documents under a specific branch (for example having an entity type called doctors where each individual entity is a doctor). Entities are best used with relationships to document types (following the example above having insurance documents related to each doctor entity). However, it is up to each customer to decide how they wish to use or not use entities.
Add – To add a new entity type, select the Add button at the top of the table. The entity properties screen will launch. From there the user must enter in an Entity Type Name (no spaces, name stored in the database), a display name (will show up on the site), determine a sort order, add the needed custom fields, and select the group permissions.

<table>
<thead>
<tr>
<th>Entity Type Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name:</td>
<td></td>
</tr>
<tr>
<td>Sort Order:</td>
<td></td>
</tr>
<tr>
<td>Custom Fields:</td>
<td></td>
</tr>
</tbody>
</table>

Add New Add Existing

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Display Name</th>
<th>Type</th>
<th>Notes</th>
<th>Required</th>
<th>Search</th>
<th>Basic Search</th>
<th>Default Display Field</th>
<th>Conditionally Required Field</th>
<th>One and Done Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActualDate</td>
<td>Actual Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Custom Fields – If the user knows of a custom field they wish to add to the entity they can select Add Existing where they will get to pick from the currently available custom fields on the site. Otherwise the user can use this opportunity to create their own custom field. Once a custom field is selected users still have the option to edit it using the pencil icon, remove it (the red x icon), and determine how they want it to be displayed. The options are:

- **Required** – Makes sure that when the entity is added or edited this field must always be filled out.
- **Search** – Allows this field to an option for advanced search dropdown for the entity type.
- **Basic Search** – Allows this field’s value to be searched in the basic search bar.
- **Default Display Field** – This makes the field the default in the advanced search dropdown (Note that only one field per an entity type can be designated as default).
- **Conditionally Required Field** – Users can use this to make a field depend on another field to be completed/filled out. When selected a popup, window will appear where the user can select which field the current selection should be dependent on and what the validation error message should be (DOMA suggests a descriptive message letting the user know what is missing).
- **One and Done Field** – After this field is saved while having a value it becomes a read-only field. No user will be able to edit it regardless of permissions. The only way to undo this is to come back and uncheck this selection.
Edit – To edit an entity type, select the edit icon (pencil) next to the desired entity type. The Entity Properties page will launch which looks exactly like the Add page except for the buttons at the bottom.

Delete – To delete an entity type select the red x icon next to the entity type to be deleted. Note that Entity Types cannot be deleted unless all entities under that type are deleted or relocated first.

Manage Document Types

The Manage Document Types page is used to add, edit, and delete a document type. Document types are used by most customers for generalized documents like HR Forms or Insurance Form. Documents can be added under this type (category) for easily sorting through documents latter. DOMA Support will assist with the creation of these document types.

Add – To add a new document type, select the Add button at the top of the table. The document properties screen will launch. From there the user must enter in a Document Type Name (no spaces, name stored in the database), a display name (will show up on the site), determine a sort order, add the needed custom fields, and select the group permissions.
Custom Fields – If the user knows of a custom field they wish to add to the entity they can select Add Existing where they will get to pick from the currently available custom fields on the site. Otherwise the user can use this opportunity to create their own custom field. Once a custom field is selected users still have the option to edit it using the pencil icon, remove it (the red x icon), and determine how they want it to be displayed. The options are:

- **Required** – Makes sure that when the document is added or edited this field must always be filled out.
- **Search** – Allows this field to an option for advanced search dropdown for the document type.
- **Basic Search** – Allows this field’s value to be searched in the basic search bar.
- **Default Display Field** – This makes the field the default in the advanced search dropdown (Note that only one field per a document type can be designated as default).
- **Conditionally Required Field** – Users can use this to make a field depend on another field to be completed/filled out. When selected a popup, window will appear where the user can select which field the current selection should be dependent on and what the validation error message should be (DOMA suggests a descriptive message letting the user know what is missing).
- **One and Done Field** – After this field is saved while having a value it becomes a read-only field. No user will be able to edit it regardless of permissions. The only way to undo this is to come back and uncheck this selection.

**Edit** – To edit a document type, select the edit icon (pencil) next to the desired document type. The Document Properties page will launch which looks exactly like the Add page except for the buttons at the bottom.

**Delete** – To delete a document type select the red x icon next to the document type to be deleted. Note that document types cannot be deleted unless all documents under that type are deleted or relocated first.

**Manage Relationship Types**

The Relationship Types page is used to create, edit, and delete entity relationships and entity-document relationships. There are two types of relationships; entity and entity-document. The entity relationship is just a relationship between two entity types meaning that any records in one type can have a relationship to any record under the other specified type. The other option is the entity-document relationship which relates an entity type to a document type. Just like the entity relationship once the relationship is created any record under the specified document type can be related to any record under the specified entity type. DOMA Support can help set these relationships up.
Add – Creating a relationship is the same for both types except entity relationships only offer entity types. Start by selecting the add button above the table for the type of relationship being created. The Relationship Properties page will launch where the types are selected, relationship name, and the inherited custom fields are picked.

Entity Type – Dropdown of all the entity types.

Relationship Type Name – User created Name for the relationship, it should be descriptive.

Inherit Custom Fields – A powerful option which lets a user search for the selected custom field even when searching based on the related document or entity type.

Document Type – Dropdown of all the document types.

Bi-Directional Name – Relationship Name for how it should appear when viewing from the related type. For example, if the relationship name is Doctor - Insurance Form then the bi-directional name should be Insurance Form – Doctor.

Edit – To edit a relationship type select the edit icon (pencil) next to the relationship being edited. This will launch a page exactly the same as the add page except for the buttons at the bottom.

Delete – To delete a relationship type select the red x next to the relationship to be deleted. Please be aware that all relationships of this type must be removed from the entities and documents before the type can be deleted.
Manage Folders

The Manage Folders page is used to add, edit, move, and delete a folder.

Add - To add a new folder, select the add button above the table. The Folder Properties page will launch (see below). From here the user can name the folder, select a parent folder, and dictate which groups and users get viewing, editing, deletion, and moving rights.

Folder Name – A name for the folder is required and cannot be ROOT. DOMA suggests a descriptive and meaningful name based on what will be stored in it or based on which subset of users will be using/storing records in it.

Parent Folder – Dictates which folder this new folder will be a subfolder of. All folders are automatically subfolders of ROOT.

Inherit Parent Permissions – Allows for the current folder to copy all the permissions of the parent folder. Once selected all permissions become greyed out. A quick way of adding a lot of permissions is to use this feature, save the folder then edit it and unselect the checkbox the user is now free to edit the permissions with all the parent ones already selected.

Group Permissions – Controls which groups have view, edit, edit image, add, delete, and move rights of the records stored in this folder.

User Permissions – Controls which users have view, edit, edit image, add, delete, and move rights of the records stored in this folder.
Edit – To edit an existing folder, select the edit icon (pencil) for the desired folder. This will launch the Folder Properties page which looks almost exactly like the add page.

Delete - To delete an existing folder, select the delete icon (red x) next to the folder name. Note that only empty folders can be deleted.

Move - To move an existing folder, select the edit icon (pencil) next to the folder. This will launch the Folder Properties page where the parent folder can be changed.

Site Management - Search Results

The Site Management section is a subsection of the Site Configuration page found under the Config main toolbar tab on the left navigation menu. The search results section contains a dropdown for all entity and document types on the site with two boxes labeled “Available Fields” and “Viewable Fields”. The “Available Fields” are all custom fields for that type that are not currently viewable when doing a search. The “Viewable Fields” are all custom fields for that type that are present when doing a search. Custom fields can be moved from one side to the other by selecting them and pressing the corresponding arrow. Note that there must be at least one custom field in the “Viewable Fields” section.
Site Management - Dashboard

The Site Management section is a subsection of the Site Configuration page found under the Config main toolbar tab on the left navigation menu. The dashboard page is where site administrators can add and delete the widgets/charts that appear on the Home page. These widgets are created using a saved search or report (see the Reports section below).

Creating a Widget – To create a widget select the Add button above the table. The Widget Properties page will launch. A source will have to be selected as stated above, either a saved search or report can be used. DOMA suggests that the widget be given a descriptive and meaningful name so that users can distinguish what is being displayed with ease. DOMA currently offers display types of bar, line, or pie charts. It is up to the user to decide which chart will best convey the information. The grouping field allows the user to base the chart on a custom field for the entity or document type in the saved search. DOMA provides some options for making the widget easier to read/understand like adding a legend and scaling the chart. It is up to the user to decide if they want these features activated. The view button allows the user to preview the widget to make sure it is how they want it. Once completed select the Add button to save the widget or the Cancel option to exit the creation page without saving.

Edit - To edit an existing widget, select the edit icon (pencil) for the desired widget. This will launch the Widget Properties page which looks almost exactly like the add page.

Delete - To delete an existing widget, select the delete icon (red x) next to the widget name.
Site Management - Links

The Manage Links button is found on the Site Configuration toolbar. A site administrator can create hyperlinks that are displayed on the Home page. Links can be used to switch applications when more than one DOMA site exists for a customer or to quickly navigate to reference sites.

Add – To add a link, select the add button above the table. It will redirect the page to the Link Properties page where the user will need to enter a link name, URL, and description. The link name will be what appears on the Home page under links. The URL is the website that the user will be taken to once they select the link name. DOMA suggests that a short helpful description is added as this is the information that will appear as a tooltip when user hover over the link. If the link is to another DOMA site and the user has the same username and password on that site, they will be automatically logged in. To stop this feature, select the Login Required checkbox. If the link should open in a new window instead of a new tab, then select the New Window checkbox.

Edit – To edit a link, select the edit icon next to the name of the link being edited. This will open the Link Properties page where the user can edit the name, URL, and description just like when adding a link.

Delete – To delete a link, select the delete icon next to the name of the link on the Manage Links page.
Site Message

Defines the message displayed in the Announcements section on the Home page. The Administrator of the site maintains this message. For ease of usability the site message area looks and operates like a word document. The administrator is given several options of previewing the message in the design tab, HTML tab, and preview tab. The design tab is the one seen above where the message is crafted. The HTML tab shows the message in pure HTML code. The preview tab lets the administrator observe how their message will look on the Home page.

Watermarking

Through Watermarking, you can export or print a document and have a custom field or text printed on every page. This is useful for filing or identifying documents once they are duplicated outside of the DOMA platform. From the Watermarking home screen, you will see a list of all the Document Types. The list of Document Types will indicate whether Watermarking is set for Export or Print. To Edit a Document Type’s Watermarking properties, click on the edit icon on the left.

* Note that the exported document will be converted to .TIF format, regardless of the file type in DOMA if it has an export watermark. *
Once the edit icon is selected the Watermarking Properties page will launch. To enable or disable watermarking click the checkbox. A custom field’s value for the document can be selected by choosing a custom field. A custom text can be added along with the custom field value (if both are selected the watermark will display the text first followed by the custom field value). The watermark can be placed along the header or footer of the document.

The watermarks cannot be deleted however they can be removed from the document type by unselecting the checkboxes in edit mode of each document type.
Workflows are an immensely powerful productivity tool that introduces the ability to build Tasks around Entities and Documents using rules and deadlines. Workflows allow Documents and Entities to pass through a traceable lifecycle. Pseudo Workflows can be created through Saved Searches; however, Workflows consist of a sequence of connected steps where each step follows without delay or gap and ends just before the subsequent step may begin. Workflow Tasks can be Concurrent as well as Sequential. A Workflow can contain any combination of Concurrent and Sequential Tasks.

- Concurrent Tasks – Multiple tasks happening at once.
- Sequential Tasks – Dependent upon another task being completed.

From the Manage Workflow Page, a User can:

- Add a Workflow by clicking on the "Add" tab at the top of the list.
- Search for a Workflow by typing in the first few letters into the “Find Workflow” box; then hit the magnifying glass IconSearch.png. You can also use the Wild Card character: Asterix.png
  - Clicking the magnifying glass while the Find box is empty will bring the full list back again
- Edit a Workflow by clicking the pencil icon.
- Delete a Workflow by clicking the red "X" next to its name. You will be prompted with a pop-up box to confirm the delete.
- The Active column indicates whether a Workflow is turned on or off. Workflows are turned Active by clicking on the pencil icon and checking the Active box at the top of the Workflow screen.

NOTE: You can Sort by Ascending or Descending order by clicking on the column heading.

IMPORTANT: When a User/Group Task is created, the Group that the Task is assigned to will see a new Left Menu Display on their Home Screen.
Adding/Editing a Workflow

Workflows can be added by first selecting the add button above the table on the Manage Workflows page. From there the user will be directed to the Workflow page where they will have to create a name for the workflow that is meaningful and descriptive on the process contained within. Next the user will have to decide if they want to make the workflow active or wait until they are completed and have reviewed the tasks. (DOMA recommends that the user wait until all tasks are done and have been reviewed before turning on a workflow.) Please note that active workflows will not allow for the editing of tasks. The last step is adding tasks for the workflow, to do this select the add tasks button if this is a new workflow or the add button if this is an established workflow. If editing a workflow select the edit icon next to the name. This will launch the Task Properties page.
On the Task Properties page is where the task can be set up using the various options that DOMA has incorporated listed below. Please note that active workflows will not allow tasks to be edited.

**Task Type** – Determines what kind of task it should be along with who should complete it; users or the system. Depending on which type is selected the Detail section at the bottom of the page will change to suit the needs of that type. The options are currently:

- Populate Custom Fields *
- System Move to Folder
- Edit Document *
- Send Email
- Assign Relationship *
- System Populate Custom Fields
- System Add Document
- System Update Document
- System Assign to Backend Process
- System Add Journal Entry
- System Delete
- System Get Fields
- System Change Document Type
- System Assign Relationship
- System Populate User Info
Denotes that the task type is a user task, meaning it will create a workflow task list on the Home page in which users must go in and edit the records themselves.

**Name** – The name selected should be descriptive and meaningful of the action(s) being performed by the task.

**Group** – Allows for selecting which group is responsible for completing the task if it a user task. If a system task type was selected this field will be read-only and say “System” meaning that the DOMA system will complete the task. Please make sure that the selected group has the correct permissions to access and complete the task being created.

**Parent Task** – This is a complicated option that should be discussed with DOMA Support before implementing. Simply put it allows for tasks to be dependent upon a parent task, meaning the parent task must be completed first before this task will start.

**Expiration** – Only available for user tasks this option will allow for tasks to expire after a certain time frame. Expiration does not remove the tasks from the site, it just marks each task with a red block next to it (See completing workflow tasks). An email address is required for notification when the tasks expire.

**Quality Assurance** – Only available for user tasks this option allows for another group to provide quality checks on a specified percentage of the completed tasks. In the example Below, by setting the QA as Required:

- All Users in the Supervisors Group will see the “Test for QA Property” in the Task section on their Home Screen.
- All Users in the EdomaAdmin Group will see the “Test for QA Property “ in the Quality Assurance section on their Home Screen.

![Home Screen Display](image)

**NOTE:** for purposes of this example, I, the User is assigned to both the Supervisors and EdomaAdmin groups. Normally this will never be the case.

**Periodic Task** – This property is to allow the system to execute a function on an entity or document that has a date field in the past. Note that a task can also be set up through the criteria...
to do the same thing, without having periodic task turned on. Consult with DOMA Support before implementing.

**Search Criteria** – An existing saved search or a new search can be built which will dictate which records are picked up and executed by this task. Note that dependent tasks should have similar search criteria as their parent tasks.

**Sort** – Allows for the task to be sorted by a custom field from the record type selected in the search criteria section.

**Resubmit task on criteria match** – Allows for records to go through a workflow multiple times as long as the search criteria matches. Note using this option has the ability to create an infinite loop where a record will never escape the task.

**Resubmit requires dependent task completion** – Allows for records to go through a workflow multiple times as long as the dependent task was completed and the criteria matches. Like the other resubmit option, watch out for infinite loops.

**Detail** – This section will change depending on the task type selected at the top of the page. For user tasks an Instructions box will appear where instructions on completing the task can be placed along with constraints on what should be altered. For system tasks, there is no instruction box the user must input what the system should do. DOMA Support can help decide what would work best here.

### Deleting a Workflow/Task

A workflow task can be deleted by selecting the edit icon next to the name of the workflow on the Manage Workflow page. From there select the task to be deleted and click the delete icon by its name. A confirmation popup will appear asking the user to confirm their decision. If the task has records in the queue, then another popup will appear asking for another level of confirmation.

To delete a workflow simply select the delete icon next to its name on the Manage Workflow page. The user will then receive the same confirmation prompts as when deleting a workflow task.
Reports (Standard)

On the standard DOMA site, five basic reports are available to users who have been granted access. Additionally, the ability for the end user to create custom reports is available upon request. All reports are performed over a specific date range. To use any of the reports, enter the desired dates. Please note: if the date is a single digit, DOMA assumes a 0 belongs in front. (Example: 12/2/02 will automatically select the date 12/02/2002). Note that all reports can be exported as PDF, XLS, XLSX, RTF, MHT, HTML, Text, CSV, or as an Image.

User Upload Summary - The User Upload Summary is a detailed report on the number and pages of entities and documents added or deleted per user account during the specified date range. The report is broken down with data for each DOMA user account.

System Upload Summary - The System Upload Summary is a detailed report on the total number of documents and pages added by system processes during the specified date range. The report is broken down with data for each day, and week for the entire DOMA site.

System File Storage Summary - The System File Storage Summary details the file storage usage on system servers for the site. The report is broken down by file size and pages detailed by week.

Workflow Task Status Report - The Workflow Task Status Report displays task status by group and by workflow. It is further broken down by the status (e.g. New, Assigned, Complete, etc…).

Workflow User Report - The Workflow User Report displays the number of completed tasks by workflow, user, and over a specified date range.

Custom Report Builder

Users with access to create report permissions can create reports that are specific to the site. The Custom Report Builder functions just like the Dashboard Widget section under Config > Site Management. The custom reports can be thought of as charts of data based on saved searches or custom built searches. (See Site Management – Dashboard section for description).
Custom SQL Report Builder

Custom SQL Reports are a special kind of report that directly query the SQL database for the site and must be set up with assistance from DOMA Support. These reports are flexible and robust displaying the information in a columnar format. Because of the nature of these reports the DOMA development team as well as DOMA Support must assist in creating these reports. See below for example of the builder page.

Audit Report Builder

The audit report is a special type of report where site administrators can watch a certain action, user, document or entity type, custom field, or folder. Just like the Alerts section under Site Management the audit report is built in a similar manner. See the Alerts section for how to create an audit. Be careful when creating audit reports as large ones can slow down or freeze a user session when viewed.
User Preferences can be located on every page of the site by clicking on the gears icon at the top right of the main menu banner. It will launch the User Preferences Home page. From this home page if the user has been granted rights will be able to access the user settings, change password, change email, saved searches, dashboard, search results, links. Please note that changes to the saved searches, dashboard, search results, and links sections will only alter them for the individual user.

User Settings

User Settings allows for the user to control the number of search results displayed per a page, several aspects of DIA and DIAL as well as turning on counts for saved searches.

<table>
<thead>
<tr>
<th>Search Results:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Results Per Page:</td>
<td>20</td>
</tr>
<tr>
<td>Sub Results Per Page:</td>
<td>10</td>
</tr>
</tbody>
</table>

**DIA:**
- Display Thumbnails:
- Forms PDF Mode: Prompt for choice
- Viewer Mode: Fit to Width
- Split and Add:
- Split and Copy Doc Fields:
- Split and Copy Entity Fields:

**DIAL:**
- Display Thumbnails:
- Forms PDF Mode: Prompt for choice
- Viewer Mode: Fit to Width

**Home:**
- Show saved search counts:

**Search Results:**
- Results per page – must be between 1 and 100
- Sub Results per page – must be between 1 and 100

**DIA & DIAL:**
- Display Thumbnails – Allows users to opt out of the ability for DIA to display thumbnail pages for the current record in the left viewing pane.
- Forms PDF Mode – Allows the user to decide what DIA should do when PDF electronic forms are identified.
- Viewer Mode – How the pages should be fit to the viewing pane.

**Split options** – These checkboxes are to make splitting large amounts of documents easier by letting the user set how the split should be set up which will persist across sessions.

**Home:**
- Allows for saved searches on the left side of the Home page to show the total number of records in them. Please note that if this option is enable load times for pages in DOMA will increase as those searches will all run to check their numbers.

<table>
<thead>
<tr>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Populate Custom Fields (8)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Saved Searches</th>
</tr>
</thead>
<tbody>
<tr>
<td>testing (16)</td>
</tr>
<tr>
<td>Patient - Allergies (8)</td>
</tr>
<tr>
<td>Test Doc (12)</td>
</tr>
</tbody>
</table>
Change Password

Change Password allows the current user to change their specific DOMA user password. The user enters the old (current) password, the newly desired password, and the new password again for confirmation. Once the user clicks the ‘Change Password’ button, a confirmation message verifies that the user password is changed. Click the Done button to return to the previous screen.

<table>
<thead>
<tr>
<th>Current Password:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Passwords must contain at least 8 and at most 40 characters, contain at least 1 alpha character, contain at least 1 number, and contain at least 1 special character.

<table>
<thead>
<tr>
<th>New Password:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Confirm New Password:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Change Email

Change Email allows the current user to change their specific DOMA user email. The user enters new email address, then reenters it for confirmation. Once the user clicks the ‘Change Email’ button, a confirmation message verifies that the user email is changed. Click the OK button to return to the previous screen.

<table>
<thead>
<tr>
<th>New Email Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Re-enter New Email Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Saved Searches

This section is the same as the saved search section under Admin > Group Saved Searches, except the searches here only show for the user who created them unless it is turned in a group search. To make a saved search a personal saved search simply does not fill out the group section when creating one. When editing a group saved search and removing the group the search reverts to a personal saved search and will show up here for the user that created it. The same applies for a personal search, if a group is selected it will no longer be found under User Preferences but instead under Group Saved Searches.
Dashboard

The Dashboard section under the User Preferences page has the same functionality as the Dashboard section under Config, except that this page is used to create and control the widgets for the user logged in. Any group widget that is created under the Config tab will show up here for the user that created that widget. To edit this group widget the user will have to go to the Config Dashboard page, in the User Preferences Dashboard page the widget will look like the top option in the image below (without any edit/delete icons). Refer to the Config Dashboard section for instructions on adding/editing/deleting widgets.

Search Results

This search results page functions just like the one on the Config page (see that section for information on how to use this feature). From the Config page option an administrator can set the viewable fields of each document and entity type. This page under User Preferences allows a user to override those selections as well as specifying how many results show up when searching for that type under advanced search.
**Links**

The links section under User Preferences operates the same way as the one under Config. The links created on this page can only be viewed on this user’s account and appear as the top options under the Links section on the Home page.

<table>
<thead>
<tr>
<th>Link Name</th>
<th>URL</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOOGLE</td>
<td><a href="http://www.google.com">http://www.google.com</a></td>
<td>Redirects to Google.</td>
</tr>
<tr>
<td>DOMA</td>
<td><a href="http://domaonline.com">http://domaonline.com</a></td>
<td>Redirects to the DOMA Technologies LLC website</td>
</tr>
</tbody>
</table>

**Help**

Every page on the DOMA site contains a help icon, which when clicked will open a new window to the help documentation for the page that the user is currently on. This wiki can be beneficial to new users and for those that wish to learn more about the process they are working on. There is a wiki page for almost everything that a user could possibly do on the DOMA site. If information is not present on the wiki, contact DOMA Support and assistance will be provided and the wiki will be updated in a timely manner. Go to [https://wiki.domaonline.com/Main_Page](https://wiki.domaonline.com/Main_Page) to learn more.
Submitting a Help Desk Ticket

From the Home page of the users DOMA site there should be a link labeled DOMA Support or OSTicket – Help Desk under the links section. The link will take the user to the DOMA Support ticket system where a ticket can be submitted. When submitting a ticket please be as descriptive as possible also noting what has already been tried. If the issue lies with a document or entity, please include the DocID or EntityID of the record.

NEVER SUBMIT PHI /PII THROUGH THE TICKET SYSTEM.

Once the Help Desk link is selected the user will be redirected to the support page, [https://support.domaonline.com/support](https://support.domaonline.com/support), from here a user can Sign In using the sign in link in the top right or continue as a guest.

DOMA offers free customer support during normal business hours (M-F 8AM-5PM EST).

Open a Ticket

To open a ticket, select “Open New Ticket” either in the banner or the button in the middle of the screen. The ticket page will launch (see left). From here the user must fill out the form including their email, full name, number, summary of the issue, and a description of the issue. It is highly encouraged to attach images of the issue, but please verify that no PHI or PII is present. Once the form is completed select the “Create Ticket” button at the bottom of the page or click the “Reset” button to clear all form fields and start over. If at any time in the creation process if the user, no longer wants to create a ticket click the “Cancel” button or close out the window. When the ticket is created, an email will be sent to the address specified with a link to the created ticket.
Check on a Ticket

A user can check on the status of a submitted ticket at any point by clicking the link in the confirmation email sent to them when the ticket was created. Please note that any time the ticket is updated an update alert email will be sent to all listed emails on the ticket. However, if the user no longer has the email they can go to the support site and select the ‘Check Ticket Status’. The user will be redirected to the page below where they will have to input their email and ticket number to be sent another access link.

For users that create a lot of tickets it might be beneficial to create an account on the support site. Check with your administrator beforehand to make sure that you have the correct permissions to do so.

Additional Information

DOMA Support is free to all customers during normal business hours (M-F 8AM-5PM EST). The help desk can be reached by submitting a ticket through the site https://support.domaonline.com/support, by email support@domaonline.com, or by phone by calling (757) 306-4920 ext. 6101.
Appendix A – DOMA Imaging App Lite (DIAL) Toolbar Buttons

- Downloads the document to the local PC. Users can save the image in a TIF or PDF format.
- Downloads the document to the local PC for printing.
- Increases the size of the document in the viewer.
- Decreases the size of the document in the viewer.
- Fits the entire width of the document in the viewer.
- Fits the entire document in the viewer.
- Rotates the document counter clockwise 90 degrees each time it is pressed.
- Rotates the document 180 degrees each time it is pressed.
- Rotates the document clockwise 90 degrees each time it is pressed.
- Displays the first page of a multi-page document.
- Displays the previous page of a multi-page document.
- Displays the page number of the displayed page within the document. In addition, the user can enter in a specific page number to go directly to the specified page.
- Displays the next page of a multi-page document.
- Displays the last page of a multi-page document.
- Navigate to the previous Entity in the Search Result set (or user work queue).
- Navigate to the previous Document in the Search Result set (or user work queue).
- Navigate to the next Document in the Search Result set (or user work queue).
Navigate to the next Entity in the Search Result set (or user work queue).

Returns to the previous search results page.
Appendix B – DOMA Imaging App (DIA) Toolbar Buttons

Exports the document to the local PC. Users can save the image in a TIF or PDF format.

Exports the document to the local PC for printing.

Uploads the document to the site. The drop-down arrow allows users options on where to upload any new pages in the document.

Causes the scanner to begin scanning. The drop-down arrow allows users to select the scanner, show the scanner dialog, and change the scanner settings.

Increases the size of the document in the viewer.

Decreases the size of the document in the viewer.

Fits the entire width of the document in the viewer.

Fits the entire document in the viewer.

Rotates the document counter clockwise 90 degrees each time it is pressed.

Rotates the document 180 degrees each time it is pressed.

Rotates the document clockwise 90 degrees each time it is pressed.

Deskews the selected pages (straightens the image).

Removes borders from the selected pages.

Despeckles the selected pages (makes them clearer).

Displays the first page of a multi-page document.

Displays the previous page of a multi-page document.
Displays the page number of the displayed page within the document. In addition, the user can enter in a specific page number to go directly to the specified page.

Displays the next page of a multi-page document.

Displays the last page of a multi-page document.

允许为注释添加到图像上。请参阅DIA部分以获取更多信息。

导航到搜索结果集（或用户工作队列）中的前一个实体。

导航到搜索结果集（或用户工作队列）中的前一个文档。

导航到搜索结果集（或用户工作队列）中的下一个文档。

导航到搜索结果集（或用户工作队列）中的下一个实体。
Appendix C – Installing and Running Standalone DIA

DOMA Technologies recognizes that a large portion of the user base only work with records in some capacity be it scanning or updating the fields. Therefore, version 7.7 will implement a standalone version of the DOMA Imaging App (DIA). This standalone version nicknamed (SADIA) will have the same functionality that DIA currently has, but will have another tab called ‘Search’ where users can run advanced searches, create/update/delete saved searches, complete tasks, access links, and control the user preferences.

Installing the application on the desktop is the first step. Make sure the user trying to install the application has install rights on their workstation otherwise contact the IT department. The install link is found under tools on the Home page, ‘DOMA Imaging App’ will launch an instance of the application and ‘Install DOMA Imaging App’ will launch the install process. The user will see a popup with the Download link. Select the Download link. This will start the download of Setup.exe. The user should see it downloading at the bottom of the window, if it is not there check the windows download folder. Once it is finished downloading select it. The file ‘Setup.exe’ will begin setting up the standalone version on the user’s desktop. Once it has finished the setup the application will create an icon on the desktop like so. It will also launch an instance of the application.

Since the new DIA will be a standalone version that does not require the user to login to the site first they must be authenticated through the application. When the user selects the icon on their desktop the application will first launch the popup below. The banner will say “Login to DOMA” with the first part of the site’s URL in parentheses. There will be three form fields where the user must input their username, password, and the site-specific part of their URL (this is the last part of the URL after the https://test.domaonline.com/(this part)). This only has to be typed in once for each site as the application will remember which site the user wants to login to. Once the username and password are input the login button will activate. Just like on the site a user has three attempts to login before locking their account. If the user has forgotten their password, they can select the “Forgot Password” link which will follow the same steps as the option on the site.

After the user, has logged in they will see the main search tab of the application (see below). From here the user can use the site just like they normally would. In the left navigation menu users, can see their tasks, saved searches, and links. Clicking on a task or saved search will open the results in the pane on the right side. The results will be displayed as they are on the site, they will even have the same buttons.
Searching in Standalone DIA

To run a basic search in SADIA, make sure that the type selected is <All Types> then input the search term into the ‘Search Phrase’ box. Select ‘Search’ and the user will be presented with results that mirror those found on the site using the same basic search. Running an advanced search is as simple as selecting the desired document or entity type from the Type dropdown. This will activate the “+” expand button to add more criteria. Criteria are controlled the same way they are on the site. When the user is satisfied with their search criteria select the ‘Search’ button. If the user is not satisfied they can select the ‘Reset’ button which will clear all criteria and set the search back to the basic search parameters. There are four buttons dealing with searching, they are:

**Search** – Runs the search based on the current parameters.

**Save** – Once a search is run this button will activate allowing users to create a saved search just like on the site. Note that this button will become ‘Update’ when viewing a saved search.

**Display Fields…** - Will allow the user to control which fields are displayed for the search and which order they appear.

**Reset** – Will clear all search results and criteria and reset the search criteria to the <All Types> basic search (which is the default). Note this does not delete the saved search or remove anything from the site.
Uploading a File in Standalone DIA

When launched, the application will always display the Search tab, but will be missing the document management tab. To open a document tab, select File – New Entity. This will bring up the standard DIA page where records can be added, edited, and manipulated. From here managing a document/entity is the same as all previous versions.

DIAL in Standalone DIA

To view a document or entity using DIAL on the standalone version the user selects the DIAL button next to the record they want to view and the application will open the document management tab. However, the user will not be able to edit the image until the record is checked out, for convenience a ‘Check Out’ button is provided under the custom fields.

User Preferences in Standalone DIA

To make sure that all aspects of the site that most users need is available, user preferences has been added under the Tools option on the main toolbar. User preferences contains the user settings, change password and email, saved search management, and link control. Please note that these are for user preferences, to set a group preference the Admin panel on the main site will need to be used.
Appendix D – Workstation Requirements

Minimum Requirements for Viewing Documents (DIAL)

- DIAL works with any computer with an internet connection and supports the following browsers:
  - Modern browser with latest version and updates (Google Chrome or Internet Explorer 11 recommended).
  - For all browsers, JavaScript and TLS 1.0+ are required.

Minimum Requirements for Scanning Documents (DIA)

- Microsoft Windows 7 or higher OS with the latest updates applied
- Microsoft Internet Explorer 11 or higher with the latest updates
- Microsoft .NET Framework 4.6.2+
- TWAIN or WIA Compliant Scanner with manufacturer provided TWAIN or WIA Driver
- 4GB Memory Minimum
- Free HDD space for working with Documents
- Direct outbound TCP Port 443 (non-proxy connection)

Scanner Requirements

Any recently manufactured department level office scanner from a major manufacturer. Examples of typical scanners include: Canon DR-6010, Fujitsu s1500, and Kodak i30. TWAIN drivers must be obtained from the scanner manufacturer and installed prior to use. Older scanners or very high speed scanners may need a recent TWAIN driver from the manufacturer’s website installed on the workstation prior to accessing the DOMA application.

DOMA Web Scanning requires administrative access to the local PC for a one-time security setting configuration install. This configuration is automatically made when the user clicks Scan for the first time from the toolbar. A redistributable copy of the DOMA Web Scanning Security Configuration install for a network or automated deployment is available by contacting technical support.