



## Document Search and Results

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This document contains information to retrieve documents in Vaultview. The document search page is the landing page after you login to Vaultview, and allows you submit queries, view search results, and interact with documents.

### Document Search

The document search page is the first page you will see after accessing Vaultview, and contains utilities for searching, managing, and configuring Vaultview.

### Document Search Page

The screenshot shows the Vaultview Document Search interface. At the top, there is a navigation bar with links for Document Search, Vaultview Configuration, Document Management, and Vaultview Logs. The main content area is divided into two panes: 'Document Search' and 'Document Search Results'. The 'Document Search' pane contains a 'Select document type' dropdown menu set to 'Patient Records', a 'Keywords' section with input fields for Patient First Name, Patient Last Name, App Date from, to, and Chart Type, and 'Search' and 'Reset' buttons. The 'Document Search Results' pane is currently empty. The footer of the page displays 'Vaultview'.

### Document Retrieval

The document search panel allows you retrieve documents based on document type and keyword values.

After you select a document from the Document Type drop down menu, its Keywords appear in the Keywords section. Each keyword type uses a unique controls specific to its keyword type. A Text keyword uses a textbox, Choice Menu has a drop down menu, Number uses a textbox, and Date and Time uses a textbox and date control. Each keyword type is expecting specific characters. For example, Date and Time uses a date format (e.g. 10/1/1998) to search for documents, and does not accept letters.



## Document Search Panel

The screenshot shows the Document Search Panel with several callouts pointing to specific controls:

- Hide Document Search panel**: Points to a double-left arrow icon in the top right corner of the panel.
- Document Type drop down menu**: Points to the 'Patient Records' dropdown menu.
- Text keyword type**: Points to the 'Patient First Name' text input field.
- Date control**: Points to the date selection icon on the 'App Date from' field.
- Choice Menu drop down menu**: Points to the 'Chart Type' dropdown menu.

### Use keyword values for Document Retrieval

To search for documents using keywords, enter a value into a keyword control, and click the Search button. Vaultview searches for any document with a matching keyword value, and returns the results to the Document Search Results pane.

### Retrieving document using keywords

The screenshot shows the Document Search Panel with the following values entered:

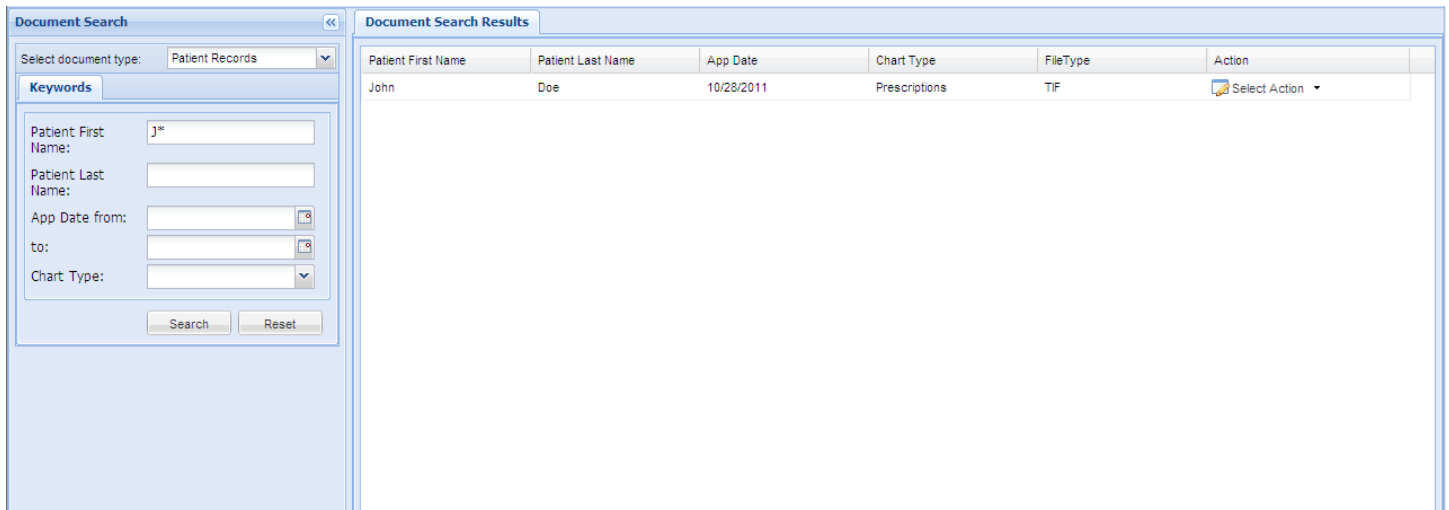
- Select document type: Patient Records
- Patient First Name: John
- Patient Last Name: Doe
- App Date from: 10/2/2011
- to: 11/26/2011
- Chart Type: Prescriptions



Vaultview can search for documents using keyword wildcard characters when one or more characters are unknown. Wildcards can only be used with text keyword types.

| Wildcard Character | Description   |
|--------------------|---|
| *                  | You can use the * wildcard character when one or many characters are unknown. For example, J* or J*hn will find any document with a keyword value beginning with a J (J*), and any combination of John. |
| %                  | The % character replicates the * functionality. See above for explanation.  |
| ?                  | The ? wildcard can be used when a single character is unknown. For example, the search D?n will find combinations for Dan, Don, etc...  |

### Retrieve documents using wildcards



### Document Search Results

After searching for documents, Vaultview will return search results to the Document Search Results window. The results window shows all documents matching the search criterion.

### Document Search Results Panel

| Patient First Name | Patient Last Name | App Date   | Chart Type    | FileType | Action          |
|--------------------|-------------------|------------|---------------|----------|-----------------|
| John               | Doe               | 10/28/2011 | Prescriptions | TIF      | Select Action ▾ |

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### Interacting with Search Results

Each item in the result list shows the document's keyword values, file type, and an Action column. The File Type is the document's format on the file system (PDF, TIF, Word, JPEG, etc...). To view a document, double-click the item in the list, or select View from the Select Action drop down list. The Select Action button allows you to view or delete a document depending on your user's permissions.

### Document Actions

| Patient First Name | Patient Last Name | App Date   | Chart Type    | FileType | Action                            |
|--------------------|-------------------|------------|---------------|----------|-----------------------------------|
| John               | Doe               | 10/28/2011 | Prescriptions | TIF      | Select Action ▾<br>View<br>Delete |

You can sort the search results ascending and descending by clicking the column header, or selecting the column header's drop down menu.



## Sorting Search Results

| Patient First Name | Patient Last Name | App Date   | Chart Type    | FileType | Action        |
|--------------------|-------------------|------------|---------------|----------|---------------|
| John               |                   | 10/28/2011 | Prescriptions | TIF      | Select Action |

You can hide a column using the Columns menu item in the keyword column's drop down menu, and unchecking the keyword's checkbox.

## Hide Column

| Patient First Name | Patient Last Name | App Date   | Chart Type    | FileType | Action        |
|--------------------|-------------------|------------|---------------|----------|---------------|
| John               |                   | 10/28/2011 | Prescriptions | TIF      | Select Action |

To move a column in the search results, drag and drop the column to your desired position

## Move Column

| Patient First Name | Patient Last Name | App Date   | Chart Type | FileType | Action        |
|--------------------|-------------------|------------|------------|----------|---------------|
| John               | Doe               | 10/28/2011 |            |          | Select Action |

Some search results might return hundreds or even thousands of results. You can use the Paging controls at the bottom of the search results window to move through all of the results.



### Paging through results

|           |            |     |                 |
|-----------|------------|-----|-----------------|
| 403027748 | 09/06/2011 | PDF | Select Action ▾ |
| X09051908 | 09/06/2011 | PDF | Select Action ▾ |
| 403027729 | 09/06/2011 | PDF | Select Action ▾ |
| 403027708 | 09/06/2011 | PDF | Select Action ▾ |
| 403027688 | 09/06/2011 | PDF | Select Action ▾ |

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