LEGACY CONTENT MANAGER (LCM)
USER GUIDE

Virtual VA

April 5, 2017

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1. INTRODUCTION

1.1 How to Use This Guide

This user's guide is meant to be a tool to be used as a reference. It covers topics that pertain directly to your tasks. This guide does not provide tutorials, but does give examples when explaining the steps to complete a given task.

Section 2 introduces the Legacy Content Manager and the sections within.

Section 3 is related to the login and logout mechanisms for the Legacy Content Manager.

Sections 4 and 5 encompass information regarding the eFolder and the Exception Processing Area in the Legacy Content Manager.

1.2 Related Documentation

System Administrator's Guide: Use this guide if you are a system administrator or if you need information concerning the installation or configuration of Virtual VA.

2. LEGACY CONTENT MANAGER (LCM)

Legacy Content Manager (LCM) web application contains multiple areas. The basic areas are: Login, Logout, and eFolders. When users have access permission to Exception Processing Area, the Manage Exceptions link will display.

2.1 LCM Menu

The Legacy Content Manager has three different items:

1. eFolder
    - Default landing page after successful login
    - Where you can view documents associated to a certain file number or SSN
2. Manage Exceptions
    - Visibility is dependent on the user's access permission
    - Takes you to the Exception Processing Area for the Legacy Content Manager
3. Logout
    - Will log out the current user and redirect back to the BEP login page

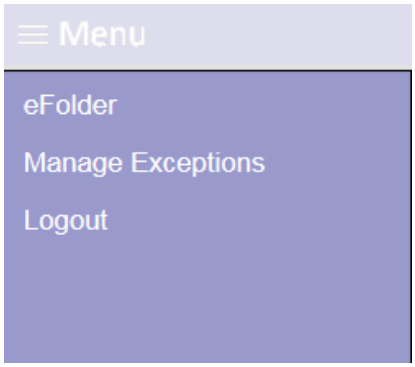


Figure 1: LCM Menu

3. LOGIN/LOGOUT TO LCM

Legacy Content Manager is integrated with the Benefits Enterprise Platform to login to the application. Therefore, the LCM login page looks the same as other applications which utilize BEP Login function e.g. VBMS.

3.1 LCM Login Page

Figure 2: LCM Login Page

When you open https://vbaphi8popp.vba.va.gov:7002/LCM, the Legacy Content Manager site, this is the **Login** page that displays. The window on top of the login page is the warning message.

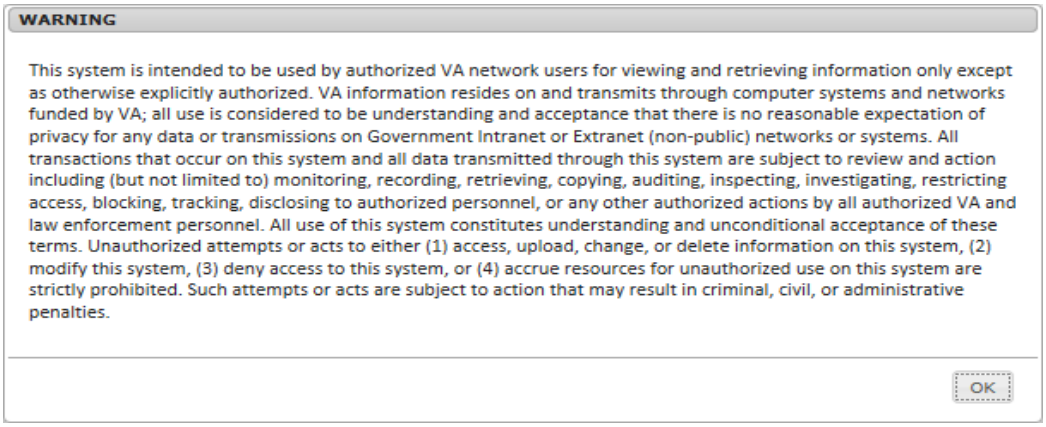


Figure 3: Unauthorized User Warning Message

Read through the warning message and click "OK" to acknowledge the user responsibilities. The Login screen will be displayed as shown below.

Figure 4: LCM Login Page

3.2 Login

To login to LCM enter your Station ID, User ID and Password. You may already have access to multiple VBA applications (VBMS, Share) using the same login ID and password. The ability to

use your existing login is accomplished by CSUM (Common Security User Manager), a software application used by VBA to create and manage login IDs and passwords. You will need your CSUM login ID and password to use LCM. If you have not received a User ID and password for LCM, please contact your local IRM.

Once you enter your credentials, click Submit to continue.

3.3 Change Password

Figure 5: Change Password

To change your password for logging into BEP:

*Note this will change your CSUM password and affect any applications that use it.

1. Navigate to the LCM Login page
2. Acknowledge the unauthorized warning message

3. Enter your Station ID, User ID, Current Password
4. Click the checkbox for Change Password, two text boxes will appear: New Password and Confirm New Password
5. The new password should meet three of the four following criteria and be at least 8 characters long:
    - Must have an uppercase letter
    - Must have a lowercase letter
    - Must have a number
    - Must have a special character
6. Confirm the new password in the Confirm New Password textbox.
7. Click the Submit button to set your new password.

3.4 Session Timeout

As a security measure, after the application has been left idle for 15 minutes, the following message will display:

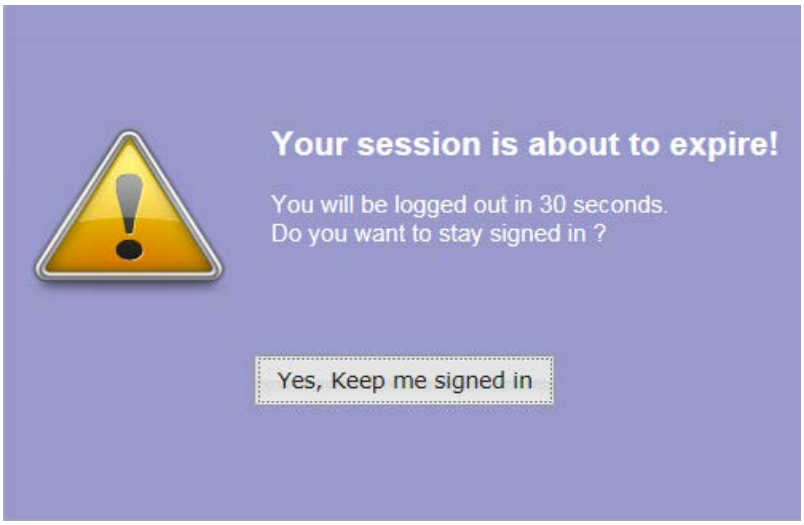


Figure 6: Session Timeout

Upon clicking on the "Yes, Keep me signed in" button, you will resume your session and the session timer will be reset back to 15 minutes.

If you do not respond to the timeout warning within 30 seconds, you will be logged out and redirected back to the LCM login page.

3.5 Logout

There are two different ways to logout of the Legacy Content Manger.

1. Navigate to the upper left hand corner of the web application and click on Menu. Select the Logout option at the bottom of the menu.
2. Close the web application window.

4. EFOLDERS

4.1 Security Privileges

After successfully logging in to Legacy Content Manager, you are ready to view eFolders. eFolders within LCM may contain sensitive medical records or Federal Tax Income, thus security is of critical importance. Your security privileges determine which eFolders, and documents within those eFolder, you can view.

As an additional security feature, the system automatically creates an audit/history record each time there is attempted access to an eFolder. The audit/history record will contain the access date and time along with the user ID of the current user. This information is not available to users on the web application, and must be requested through a help desk ticket.

4.2 View Veterans Profile

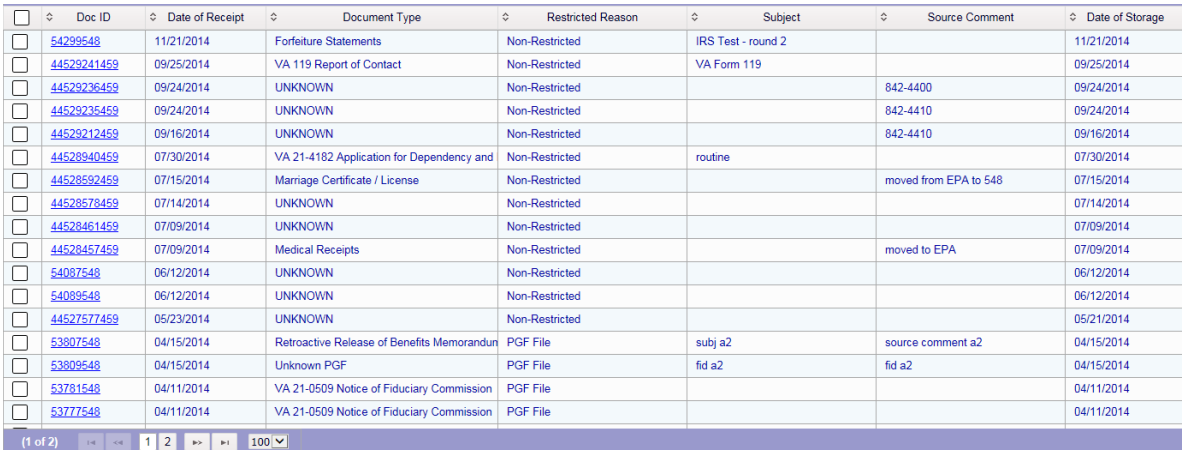
Figure 7: Veteran's Profile

After a valid file number or SSN has been entered and found, the veteran's profile information will appear and be filled in with all of the information that is found for the veteran.

4.3 View eFolders Content

4.3.1 Document List

The document grid will be populated with all of the documents associated with the entered file number or SSN. The grid defaults to show 100 documents per page.



Doc ID	Date of Receipt	Document Type	Restricted Reason	Subject	Source Comment	Date of Storage
54299548	11/21/2014	Forfeiture Statements	Non-Restricted	IRS Test - round 2		11/21/2014
44529241459	09/25/2014	VA 119 Report of Contact	Non-Restricted	VA Form 119		09/25/2014
44529236459	09/24/2014	UNKNOWN	Non-Restricted		842-4400	09/24/2014
44529235459	09/24/2014	UNKNOWN	Non-Restricted		842-4410	09/24/2014
44529212459	09/16/2014	UNKNOWN	Non-Restricted		842-4410	09/16/2014
44528940459	07/30/2014	VA 21-4182 Application for Dependency and	Non-Restricted	routine		07/30/2014
44528592459	07/15/2014	Marriage Certificate / License	Non-Restricted		moved from EPA to 548	07/15/2014
44528578459	07/14/2014	UNKNOWN	Non-Restricted			07/14/2014
44528461459	07/09/2014	UNKNOWN	Non-Restricted			07/09/2014
44528457459	07/09/2014	Medical Receipts	Non-Restricted		moved to EPA	07/09/2014
54087548	06/12/2014	UNKNOWN	Non-Restricted			06/12/2014
54089548	06/12/2014	UNKNOWN	Non-Restricted			06/12/2014
44527577459	05/23/2014	UNKNOWN	Non-Restricted			05/21/2014
53807548	04/15/2014	Retroactive Release of Benefits Memorandun	PGF File	subj a2	source comment a2	04/15/2014
53809548	04/15/2014	Unknown PGF	PGF File	fid a2	fid a2	04/15/2014
53781548	04/11/2014	VA 21-0509 Notice of Fiduciary Commission	PGF File			04/11/2014
53777548	04/11/2014	VA 21-0509 Notice of Fiduciary Commission	PGF File			04/11/2014

(1 of 2) 1 2 100

Figure 8: Document Grid

4.3.2 Pagination

The Document Grid will display a max of 100 **documents per page**. However, you can select how many documents you want to display per page; from 10, 20, 50, or 100. To change the number of documents shown, select the number from the drop down box on the right hand corner of the page navigation pane.

To **navigate to a different page** in the grid or jump to a specific page, just click on the specific page number button. To navigate to the next page, select the double arrow ▶▶. The single arrow ▶| with a solid line will navigate to the last page of documents. Likewise, the back arrows found to the left side of the page number buttons, are used to navigate to the previous or first page of documents. The numbers to the left of the page number buttons display both the current page number and the total number of pages. For example, 1 of 37 means the grid is displaying 1 page out of 37 total pages available.

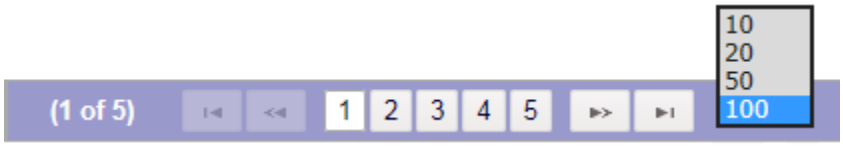
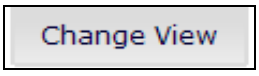


Figure 9: Grid Pagination

4.3.3 Change View



The **Change View** function allows you to rearrange and reposition the columns located in the Document Grid. When you click on the Change View Button the following dialog will open:

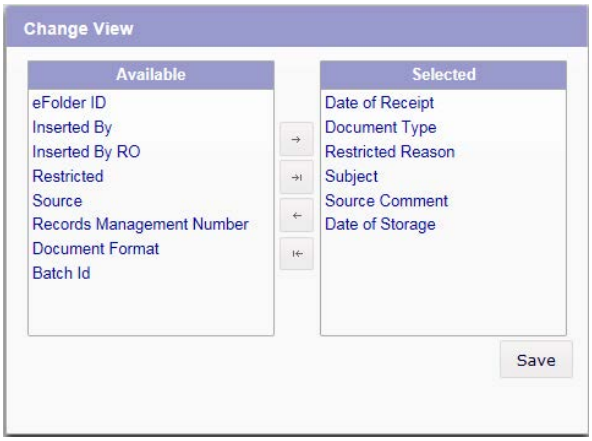
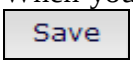


Figure 10: Change View Window

To **change the placement of the columns**, select on the Document Grid toolbar.

Select a column header within the **Available** table and the chosen field will be highlighted in yellow. Then select to move this single field over to the **Selected** table. Move over each column you would like to view within the Document Grid, and leave those within the Available table you wish to hide from view. The column headers listed in the selected table from top to bottom in sequencing order will be displayed from left to right in the Document Grid.

Notice that there are additional arrows pointing at solid lines: and . These arrows will move every field remaining in the box over to the left or to the right.

When you are finished with rearranging the fields in the order of your preference, simply select  to exit out and close the screen.

4.3.4 Keyword Search

Below the Document Grid toolbar and above the document grid, you will notice a "**Keyword Search**" textbox appears when records are displayed. It is important to note that this textbox will remain hidden unless there are search results displayed.

When there are no results found, the **Keyword Search** textbox will be hidden.

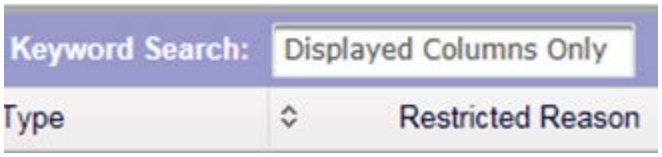


Figure 11: Keyword Search Textbox with Default Display

This "**Keyword Search**" search textbox will allow you to further refine the result set displayed in the document grid. The Keyword Search function will only perform a search on the displayed columns.

You may enter up to 20 characters in the Keyword Search textbox, including alpha-numeric, special characters, and blank spaces. The search will be case-insensitive. Press the "Enter" key to initiate a search.

To delete text in the Keyword Search box, simply manually delete the text or click the "X" in the textbox.

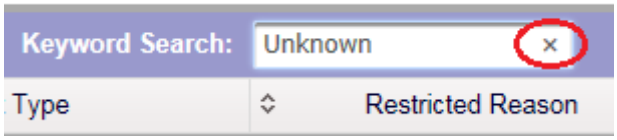


Figure 12: Clearing Keyword Search textbox

You can now enter new text in the Keyword Search textbox.

Keyword Search results displayed can be sorted by selecting column headers.

4.3.5 Document Viewer

The document viewer enables you to view documents on your screen. You can also open multiple documents at one time.

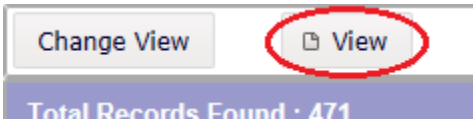


Figure 13: Document Viewer Button

First, if you want to view only one document, simply click the document hyperlink in the Doc ID column to automatically launch the document viewer and open the document. You can also select a group of documents to open in a single document viewer. To do this, select the documents by checking the '**Select**' field in the Document Grid. You may also select all

documents by clicking the '**Select all**' field above the column header. The **'Select/Deselect**' function will only apply to documents displayed within the grid. If the grid is paginated, only those documents within the currently displayed page will be selected. After you have selected the documents, press the **View** button located above the Document Grid.

Upon clicking the **View** button, the selected document(s) will open in the document viewer.

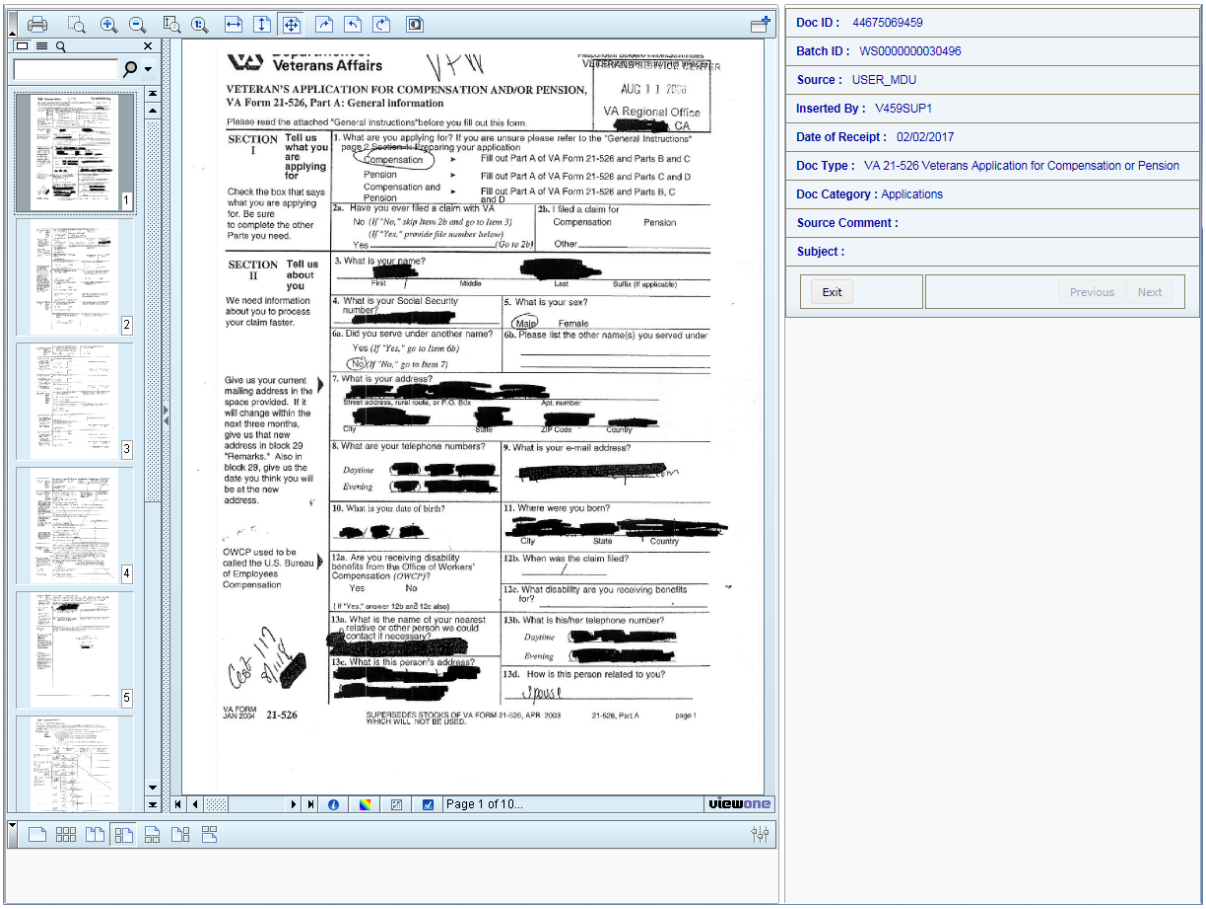


Figure 14: Document opened in Viewer

Within the viewer, to the right of the document, you will see the document attributes pane. Here, you will see uneditable fields containing document attribute information.

You will see the displays the following identifying information of the document that is automatically assigned and cannot be modified; **Doc ID**, **Batch ID**, **Source**, **Inserted By, Date of Receipt**, **Doc Type**, **Doc Category, Source Comment, and Subject**.

The last three buttons towards the bottom of the document attributes pane are used to navigate between documents, and close the document viewer.

Figure 15: Function buttons in Document Viewer

Exit – The **Exit** button will close the document viewer. You can also select the "X" button on the top upper-right of the Viewer to close.

Previous – When multiple documents are opened in the document viewer, the **Previous** button will go to the previous document if multiple documents are opened.

When a single document is opened in the Doc Viewer, the **Previous** button will be disabled.

Next – The **Next** button is used to navigate to the next document. If there is no document to view after the current document then the Next button will be disabled.

The Document Viewer allows you to magnify and rotate the documents you are viewing. You can also scroll within a page of the document that is currently in view by left clicking the mouse button, holding in place and drag up or down to move the viewable portion of the image.

The Viewer Toolbar controls are located at the top and bottom of your **Document Viewer** window and are very simple to use.

First Page – Allows you to move to the first page of the document.

Previous Page – Allows you to move to the previous page of the document.

Last Page – Allows you to move to the last page of the document.

Next Page – Allows you to move to the next page of the document.

Specific Page – Hold and scroll the status bar to jump to a specific page in the document.

Magnification Controls - These controls enable you to increase, decrease, and magnify the size of the image in the document viewer. Click on the icon with the "+" to zoom in or the icon with the "-" to zoom out. Click on the 'Magnify' button to allow selected areas of the current page to be magnified. If you right-click on this button, then the magnifier will be displayed in a separate window.

Fit – These allow the fit of view to window width, window height, and fit to window. Click whichever to your viewing preference.

Rotation Controls – These controls allow you to manipulate your document's rotation. By selecting the left, upright, or right directional controls, you can rotate your document to view in the appropriate orientation. This function proves useful especially when documents are scanned into the system upside down or sideways. The rotational controls allow you to manipulate the document so that it can be more easily viewed.

Invert – This turns on and off to invert the color of the background and text in Image Viewer.

Print - Allows you to send your documents in the Viewer to a printer (See **Section** Error! Reference source not found.**,** Error! Reference source not found.).

Thumbnails and Images – These buttons if clicked will remove thumbnails, view only thumbnails, view thumbnails on the left, right, bottom or top, and split window with two mirror pages.

5. MANAGE EXCEPTIONS

5.1 Exceptions Processing Area Overview

The **Exceptions Processing Area** (EPA) contains **electronic documents** that were transmitted to Legacy Content Manager without sufficient indexing information to insert in to an existing Legacy Content Manager electronic folder (eFolder), or to create a new eFolder from a corresponding record in the Corporate database. This lack of information results in the electronic document being marked as an 'exception' and manual intervention will be required to route the document to the proper eFolder. Legacy Content Manager eFolders are populated with electronic documents from various sources including Batch File Import (BFI) feeds, Legacy Content Manager Scanning Sites, and Fax subsystem. This document outlines instructions on reviewing and routing documents within the EPA to the correct eFolder within Legacy Content Manager.

5.2 Accessing the Exceptions Processing Area (EPA)

You must first successfully login to the Legacy Content Manager application to access the EPA. The 'Manage Exceptions' menu option will appear based on your security credentials. To access, click on the **"Manage Exceptions"** link in the **Menu**.

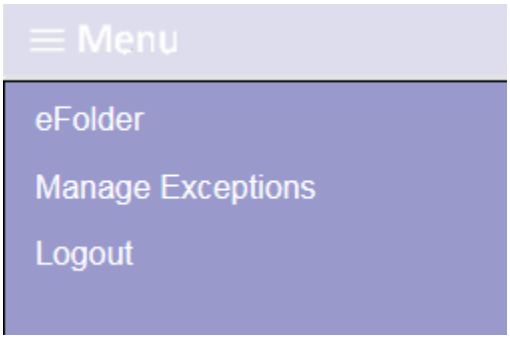


Figure 16: Manage Exceptions Tab

The **Processing Area** window will display:

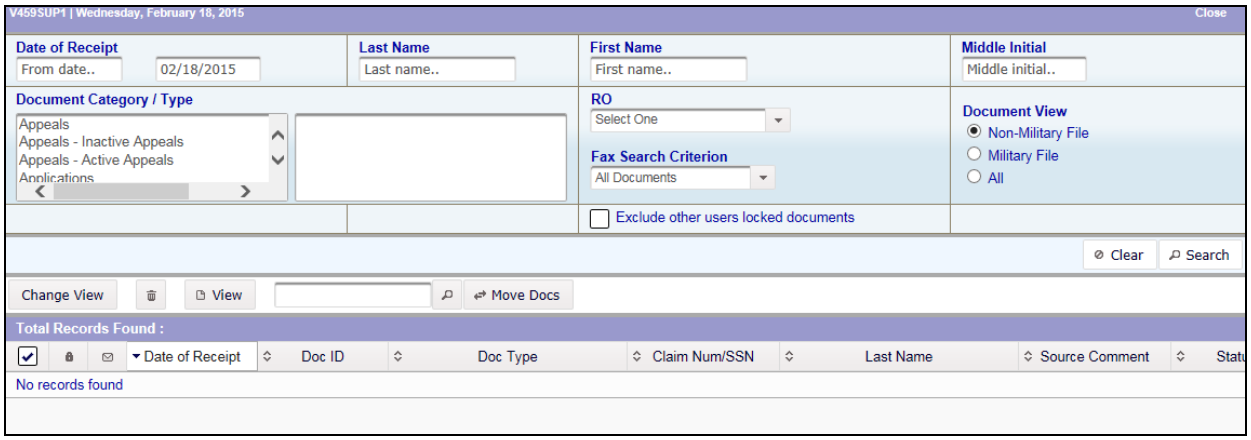


Figure 17: Processing Area Window

The Processing Area Window is comprised of two main table areas. The top portion includes fields used to filter and search for exceptions documents, and the bottom includes a Document Grid displaying the results. A toolbar above the Document Grid includes controls which allow you to view, delete and move documents.

5.2.1 Finding the Right Documents

Filtering documents will help you narrow your view to a more specific subset of documents from within the EPA queue. To do this, use the filter criteria fields located on the top section of the Document Grid.

It is important to note that no documents will display in the Document Grid until a search is executed. The default search, without entering any search criteria, will return all non-military file documents. To execute a search containing all non-military file documents, simply select the Search button.

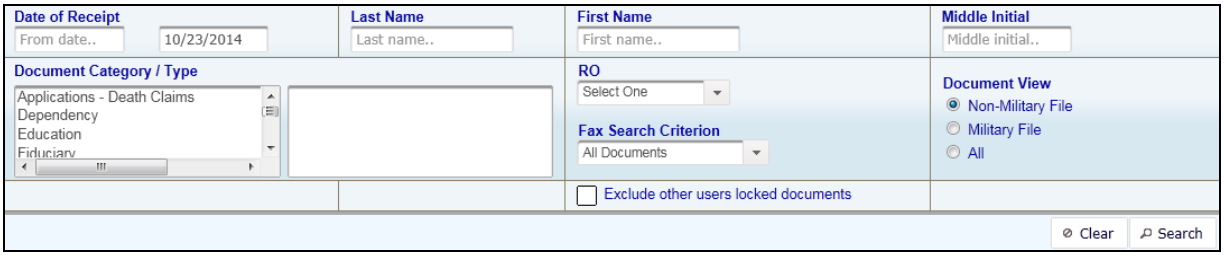


Figure 18: Filter Criteria Fields

To search by **Date of Receipt**, just click on the box "From date" and type in the date in the following format: mm/dd/yyyy or mm-dd-yyyy. Repeat these steps for the "To date" field. Dates entered must be on or after 01/01/1890, and future dates will not be accepted.

To search by **Last Name, First Name, and Middle Initial,** enter up to 20 characters for the last and first name. In order to search by name, a minimum of two characters must be entered in the last name field.

To search by **Document Category/Type,** select the document category name. The category name will highlight, and the corresponding document type(s) will appear in the field to the right. You may further filter your search by selecting and highlighting a document type. The maximum fields you can choose in both the Document Category and Document Type fields is

five. To select multiple values, simply hold down the Ctrl key while selecting.

To search by **RO,** click on the down arrow to display the dropdown field and select the RO location. You may only select one RO at a time, as noted in the dropdown field.

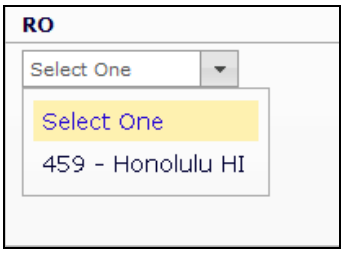


Figure 19: RO Search Field

To search by **Fax Search Criterion**, select your preference for viewing Faxed documents from the dropdown field. You can choose to view all documents (this will be the default option), view fax documents only, or exclude all fax documents.

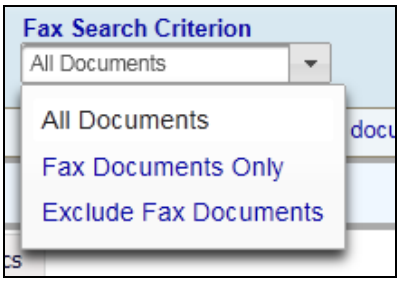


Figure 20: Fax Search Criterion Field

You can further limit the documents viewed by selecting a document status under **Document View**. You can select whether you want to see non-military file documents, military file documents, or all documents. Military file documents can be further filtered by selecting the checkbox next to '**View only expired documents**'. This will display only Expired Military documents.

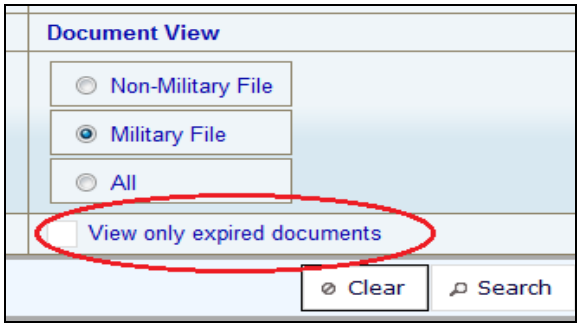


Figure 21: Expired Military Documents Only Filter

To **exclude all locked documents** (documents that are currently being used by another User); check the '**Exclude locked documents**' box located near the bottom of the filter criteria grid.

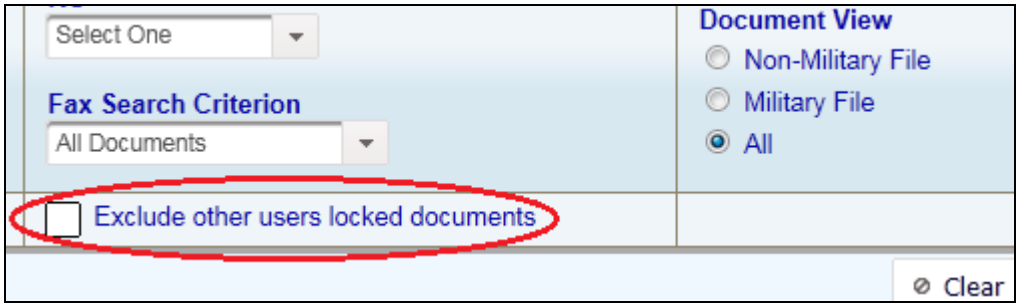


Figure 22: Search Criteria Filter

Figure 23: Clear and Search Buttons

When ready to execute a search using selected criteria field(s), select the **Search** button located below the filter criteria box on the right.

If you want to clear the search criteria selected, simply select the **Clear** button to the left of the Search button.

Keep in mind that you will not have the option of saving any default filters. You will be required to enter your search criteria for each new EPA session.

It should be noted that regardless of the filters applied, default settings have been applied to sort documents. Documents with a **Live Mail** status will always appear at the top of the grid. Date of receipt is the second sort criteria applied. These default settings apply whether you are viewing military file and non-military file documents.

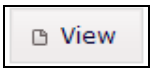
5.3 The Document Grid

Documents displayed within the Exceptions Processing Document Grid are similar in appearance to the Legacy Content Manager eFolder application. Notice below the Search and Clear fields, there is a toolbar. These features are used when working with the documents displayed in the Document Grid.

Figure 24: Document Grid Toolbar

The **Change View** button allows you to rearrange and reposition information located in the Document Grid. This will be discussed in Section 5.3.2 of this User Guide.

The trash can icon is used to delete expired military files in the Document Grid. First check the box in the column next to the selected document(s) to be deleted, and then click on the trash can icon. Additional delete functionalities are discussed in Section 5.4.4 of this User Guide.



The **View** button opens documents selected within the Document Grid. This button is discussed in detail in Section 5.4 of this User Guide.

The eFolder Search Field allows you to search for the appropriate destination eFolders. This function is further discussed in Section 5.4.3 of this User Guide.

The **Move Docs** function allows you to move EPA documents into new destination eFolders. Once an existing eFolder has been found, select document(s) and click this button to move these documents into an eFolder. Further Move functionalities are discussed in Section 5.4.3 of this User Guide.

5.3.1 Keyword Search

Below the Document Grid toolbar and above the document grid, you will notice a "**Keyword Search**" textbox appears when records are displayed. It is important to note that this textbox will remain hidden unless there are search results displayed.

Upon selection of "**Search**" or "**Clear**" in the filter criteria section, or when there are no results found, the **Keyword Search** textbox will be hidden.

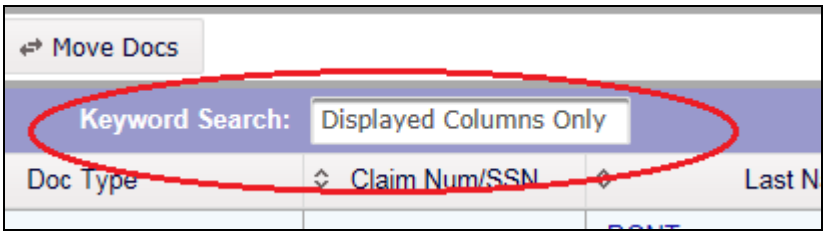


Figure 25: Keyword Search Textbox with Default Display

This "**Keyword Search**" search textbox will allow you to further refine the result set displayed in the document grid. The Keyword Search function will only perform a search on the displayed columns of the results displayed. For example, you search for "Joe" and the text "Joe" is included in the First Name field of one or more documents. If the First Name column is not displayed in the document grid, the document(s) will not be included in your result set. To change or edit the columns displayed, read section **5.4. "Working within the Document Viewer".**

You may enter up to 20 characters in the Keyword Search textbox, including alpha-numeric, special characters, and blank spaces. The search will be case-insensitive. Press the "Enter" key to initiate a search.

To delete text in the Keyword Search box, simply manually delete the text or click the "X" in the textbox.

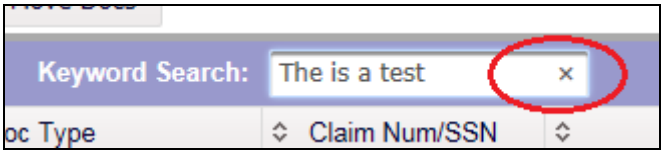


Figure 26: Clearing Keyword Search Textbox

You can now enter new text in the Keyword Search textbox.

Keyword Search results displayed can be sorted by selecting column headers.

Below the Document Grid toolbar, you will see several column headers used to describe the documents.

The first section of columns you will see cannot be moved or customized in any way. The first column contains empty fields used to select a document. This checkbox allows you to select or deselect documents to view or move from the Document Grid. You can also select the entire set of documents on the page by selecting the "select all" check box at the top.

Figure 27: Select Document Column

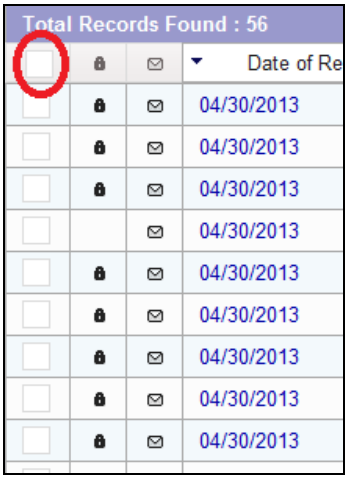


Figure 28: Select All Checkbox

A Lock Icon may appear in the second column; this indicates that the document is currently in use by another user. No changes can be made to documents that are locked by another user.

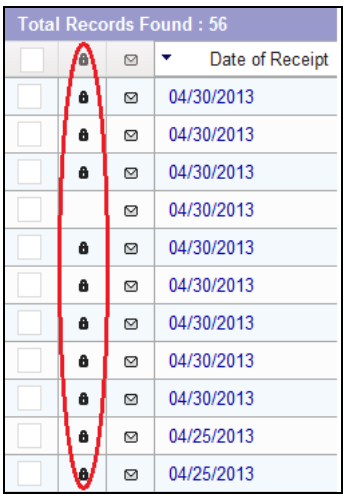


Figure 29: Locked Document Column

The fields in the next column are used to indicate the Live Mail status of a document. A mail envelope icon shows that the document is a **Live Mail** document.

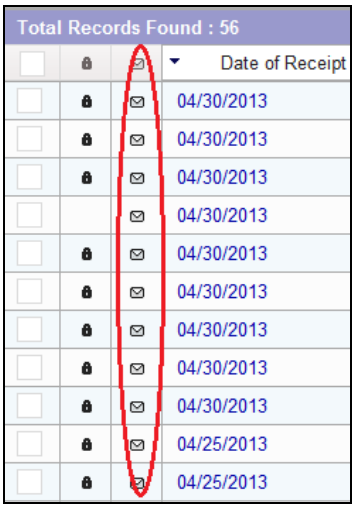


Figure 30: Live Mail Column

The final columns that cannot be adjusted in any manner are **Date of Receipt** and **Doc ID**.

The columns to the right of **Doc ID** in the Exceptions grid are customizable.

5.3.2 Change Display Columns

To **change the placement of the columns**, select

on the Document Grid toolbar.

Select a column header within the **Available** table and the chosen field will be highlighted in yellow. Then select to move this single field over to the **Selected** table. Move over each

column you would like to view within the Document Grid, and leave those within the Available table you wish to hide from view. The column headers listed in the selected table from top to bottom in sequencing order will be displayed from left to right in the Document Grid.

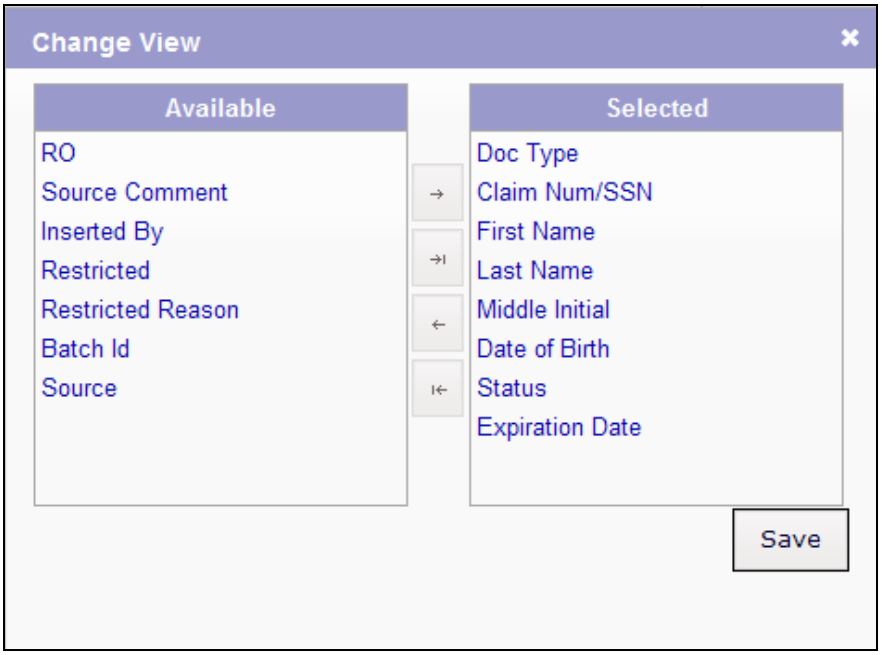
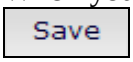


Figure 31: Change View Table

Notice that there are additional arrows pointing at solid lines: and . These arrows will move every field remaining in the box over to the left or to the right.

When you are finished with rearranging the fields in the order of your preference, simply select  to exit out and close the screen.

5.3.3 Pagination

To **resize** columns in the grid, simply click and drag the left or right side border of the column header.

To **sort** on a specific column attribute, click on the column header. That column attribute will become the primary sort criteria. Note, the document grid will refresh and the sorting order will return to the default upon closing the document viewer or executing a new Search.

Below the grid, you will notice there are a set of page numbers, arrows, and icons. This toolbar represents the page **navigation pane.**

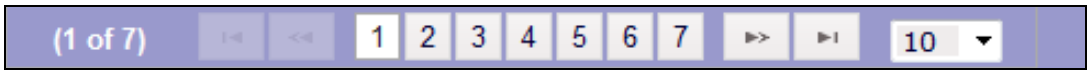


Figure 32: Page Navigation Pane

The Document Grid will display a max of 100 **documents per page**. However, you can select how many documents you want to display per page; from 10, 20, 50, or 100. To change the number of documents shown, select the number from the drop down box on the right hand corner of the page navigation pane.

To **navigate to a different page** in the grid or jump to a specific page, just click on the specific page number button. To scroll to the next page, or set of documents, click the right arrows located to the right of the page number buttons. To navigate to the next page, select the double arrow. The single arrow with a solid line will navigate to the last page of documents. Likewise, the back arrows found to the left side of the page number buttons, are used to navigate to the previous or first page of documents. The numbers on the left display both the current page number and the total number of pages. For example, 1 of 37 means the grid is displaying 1 page out of 37 total pages available.

5.4 Working within the Document Viewer

The document viewer enables you to do far more than just view documents on your screen. You may also use the viewer to split and move documents. You can also open multiple documents at one time.

First, if you want to view only one document, simply click the document hyperlink in the Doc ID column to automatically launch the document viewer and open the document. You can also select a group of documents to open in a single document viewer. To do this, select the documents by checking the '**Select**' field in the Document Grid. You may also select all documents by clicking the '**Select all**' field above the column header. The **'Select/Deselect**' function will only apply to documents displayed within the grid. If the grid is paginated, only those documents within the currently displayed page will be selected. After you have selected the documents, press the **View** button located above the Document Grid.

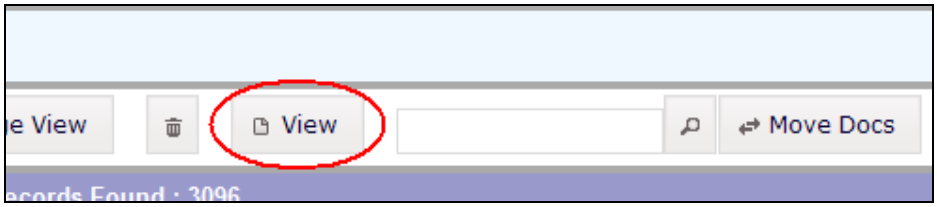


Figure 33: Document Viewer Button

Upon clicking the **View** button, the selected document(s) will open in the document viewer.

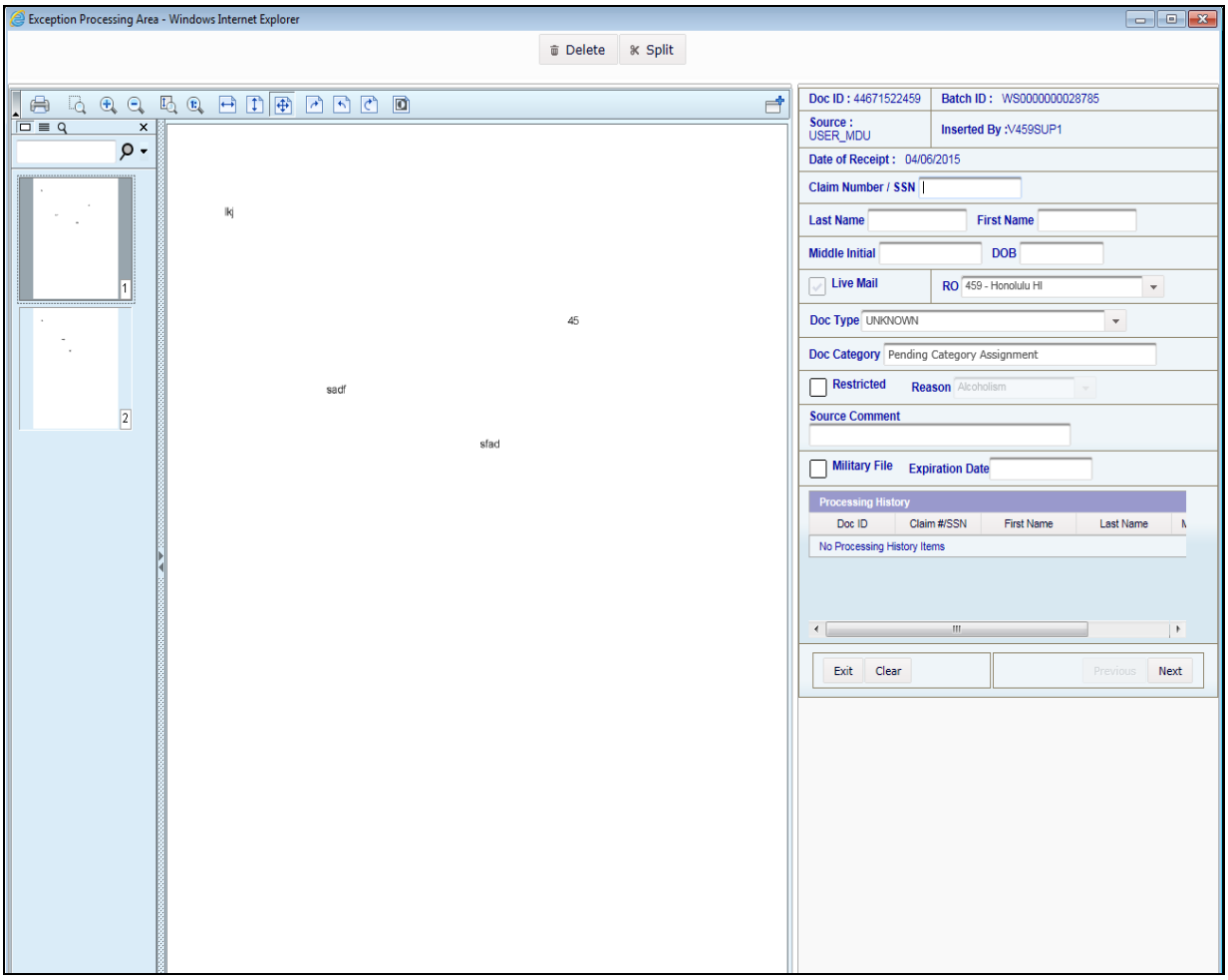


Figure 34: Document Viewer

Within the viewer, to the right of the document, you will see the document attributes pane. Here, you will see both editable and uneditable fields containing document attribute information. Note that all document attribute fields will remain with the document(s) when they are moved into eFolders.

You will see the top portion displays the following identifying information of the document that is automatically assigned and cannot be modified; **Doc ID**, **Batch ID**, **Source**, and **Inserted By**.

The next few rows of fields are blank and editable. The fields can be populated with identifying information found within the document, to facilitate a move to the proper eFolder.

You can navigate through the fields of the document attributes pane by clicking in each field, or by pressing Tab to navigate to the next field.

Claim Number/SSN – Enter a claim number or SSN in the field and select Enter or Tab. If a corresponding eFolder or Corporate record is found, available data will be populated in the name and date of birth fields. A pop-up message will also display indicating that a corresponding eFolder or Corporate Record has been found. The message will appear on the upper right hand corner of the document viewer.

Last Name and First Name – These fields will default to blank and are editable free text fields. Enter in only 20 alpha characters in these fields. The minimum value you can enter for a last name is two letters.

Middle Initial – Only one alpha character will be allowed in this text box.

DOB – Enter the date of birth here in the following format: M/D/YYYY, MM/DD/YYYY, M-D-YYYY, MM-DD-YYYY, MMDDYYYY, MM.DD.YYYY, and M.D.YYYY.

Live Mail (LM) –The Live Mail field can be selected to mark the document as actionable prior to insertion in to the proper eFolder. The ability to deselect ("turn off") LM will not be enabled, but you will have the ability to select ("turn on") LM.

RO – If the jurisdictional Regional Office is available within the document, you can choose the corresponding three-digit RO number from the drop down menu. All ROs will be available for selection.

Doc Type – A dropdown menu allows you to select a Document type from the list of all available document types within Legacy Content Manager. As within the Legacy Content Manager application, all documents within the EPA will have an assigned document type. This field allows you to change this attribute prior to insertion into the correct eFolder. It should be noted that some document types are locked and therefore will be un-editable.

Doc Category –Every document within the EPA will have a default document category automatically selected based on the selected Document Type. This field is un-editable and you will not be able to change this attribute prior to insertion into the correct eFolder.

Restricted – Check or uncheck this box to mark the document as restricted. The default is set to 'unchecked' or not restricted.

Reason – A dropdown menu allows you to select the reason associated with the restricted status. The checkbox will be accessible only when the restricted box is checked.

Source Comment – This free text field is available to enter in any relevant information in regards to the source of the document. The text box allows you to enter up to 50 characters.

Military File – This check box is used to mark documents with a military file status. For more information on contents of Military Files, please refer to M21-1MRIII.ii.4.H.25.

Expiration Date – This field reflects the date in which the document can be deleted. The field will auto-populate when the military file checkbox is selected and will be un-editable. When a user un-checks the Military file checkbox, the expiration date field will clear. This expiration date will reflect the last date of the following calendar year, i.e., at the end of 2013, documents marked as 'military file' in 2012 can be closed and disposed of. It is important to note that documents will never auto-delete.

The last four buttons towards the bottom of the document attributes pane are used to perform major functionalities and are therefore important to understand.

Figure 35: Function Buttons in Document Viewer

Exit – The **Exit** button will close the document viewer and return you to the Processing Area window. When the **Exit** button is selected, any changes made to the attributes of the current document will not be saved. You can also select the "X" button on the top upper-right of the Viewer to close and unlock the viewer as well.

Clear – The **Clear** button will clear or empty out all fields derived or fetched from the lookup database. Selecting the clear button will also clear any edits made during that user's session. The **Clear** button will not clear the un-editable fields in the document attributes pane.

Previous – When multiple documents are opened in the document viewer, the **Previous** button will not only jump to the previous document, but it will also save the information in the processing history grid.

When a single document is opened in the Doc Viewer, the **Previous** button will be disabled.

Next – The **Next** button is used to not only jump to the next document, but will also save the information in the processing history grid and/or perform verification of the indexing values and move the document into an eFolder. It is important to note that in cases where a record exists in the Corporate database, and an eFolder does not exist within the Legacy Content Manager, an eFolder will be created upon clicking **Next**. eFolder creation is described in more detail in Section 7. Please note that you must also hit **Next** upon entry of the last document in order to save your changes.

5.4.1 Processing History Table

The processing history table is part of the document attributes pane within the document viewer. The table is used to display identifying information found in documents and entered in to the editable fields (described in Section 5.4).

The fields of the processing history grid are populated when this information is saved upon selection of the **Next** button.

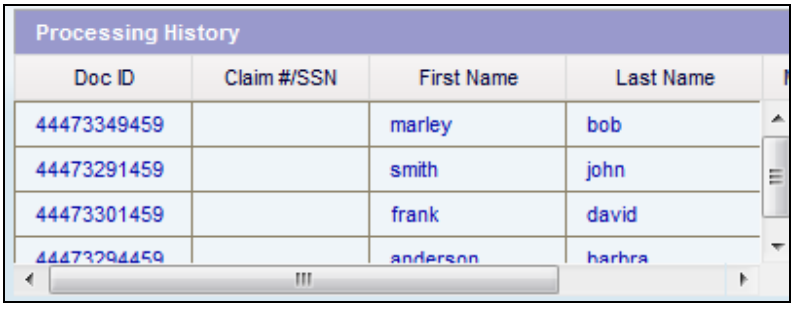


Figure 36: Processing History Table

Similar to the Document Grid, you will see several column headers describing document attributes. The processing history grid will have the following fields to help record the history of the document: Doc ID, Claim Number/SSN, First Name, Last Name, Middle Initial, and DOB.

One row will be displayed for each document contained within the current batch opened in the document viewer. Information will be displayed within the processing history table field for both documents in a move status, and for those where entries are not sufficient to execute a move.

If multiple records appear in the processing history grid, you will be able to access all records by using the vertical scrollbar.

The information contained within the Processing History Table will be saved for the next user session, and will be displayed on the Document Grid once the viewer is closed.

5.4.2 Creating an eFolder

In cases where an eFolder does not already exist, the Legacy Content Manager web application EPA will automatically create an eFolder when executing a "move document" function. This functionality removes the need for an end user to create an eFolder prior to routing the document. This feature will exist wherever the "move document" function is available. This includes bulk move in the Document Grid or individual move from the document viewer.

The application first attempts to find an already existing eFolder. If an eFolder cannot be found, lookup protocol is initiated to search the Corporate Database for a corresponding record. If a record can be found, this information will be used to create a new eFolder in the Legacy Content Manager.

5.4.3 Moving a Document

To move documents within the document viewer, the following fields are mandatory: **Claim Number, Document Type, Document Category,** and **Date of Receipt**. Once these fields have been populated to your satisfaction, click the **Next** button to move the document. Upon clicking **Next**, a pop up message will appear displaying a message indicating the document has successfully moved. The message will appear on the upper right-hand corner of the document viewer.

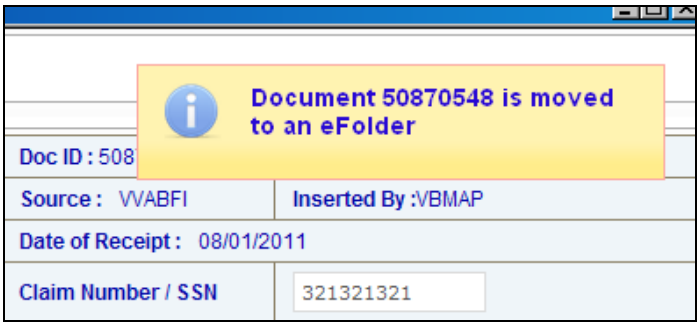


Figure 37: Message Display in Doc Viewer

In addition to the manual move described above, if a valid Claim Number or SSN is entered in that field, the document may be moved by an automated process. On a regular basis, the EPA queue will be refreshed to perform a query of the SSN or Claim number against existing eFolders and/or Corporate records. If an eFolder or Corporate record is created after your review, the document can be properly associated. Therefore, it is important to enter only accurate information in the SSN/Claim Number field.

You are also able perform a **Bulk Move**, which is moving multiple documents to a single eFolder in one action. A bulk move must be executed from the EPA window.

Figure 38: Move Button in the Document Grid

The documents to be moved are first selected from the Document Grid. Once selected, click on the magnifying glass to open up a new window in which you search for the correct destination eFolder.

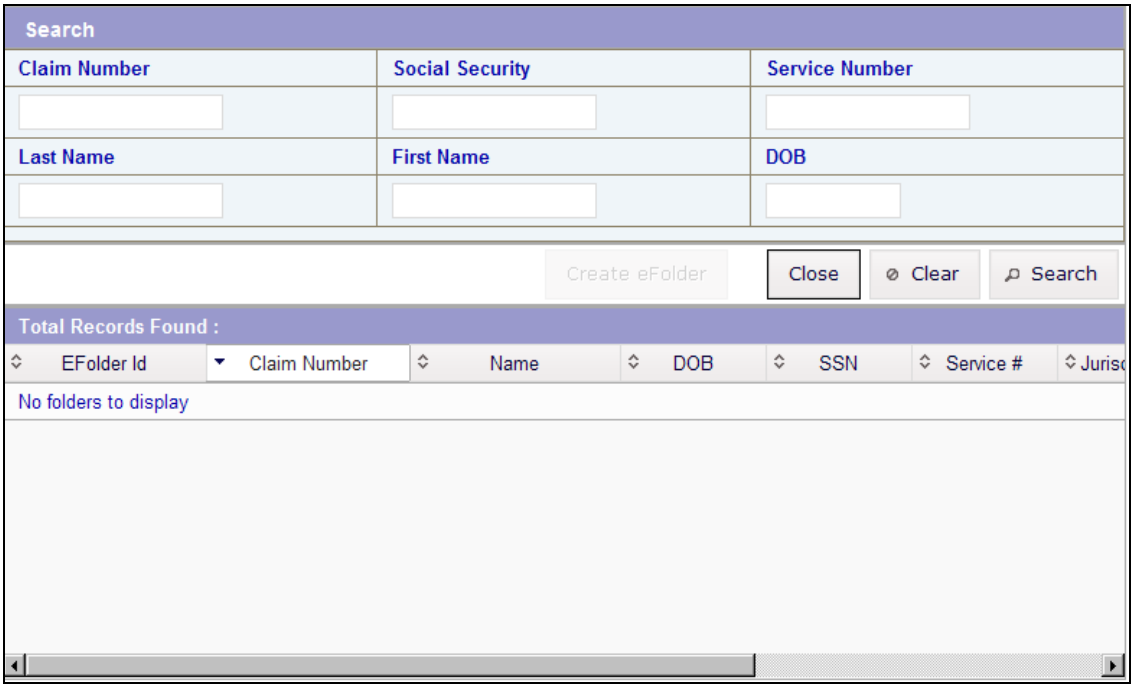


Figure 39: Searching for eFolders Window

You will notice there are many fields in which you can define your eFolder search. Claim number, Social Security, Service Number, Last Name, First Name, and DOB. Once you have entered in the search criteria, select the **Search** button to find an existing eFolder. The results will display in the grid below. To clear the entries in the search fields, select **Clear**. You may also close out the entire eFolder search window by selecting **Close**.

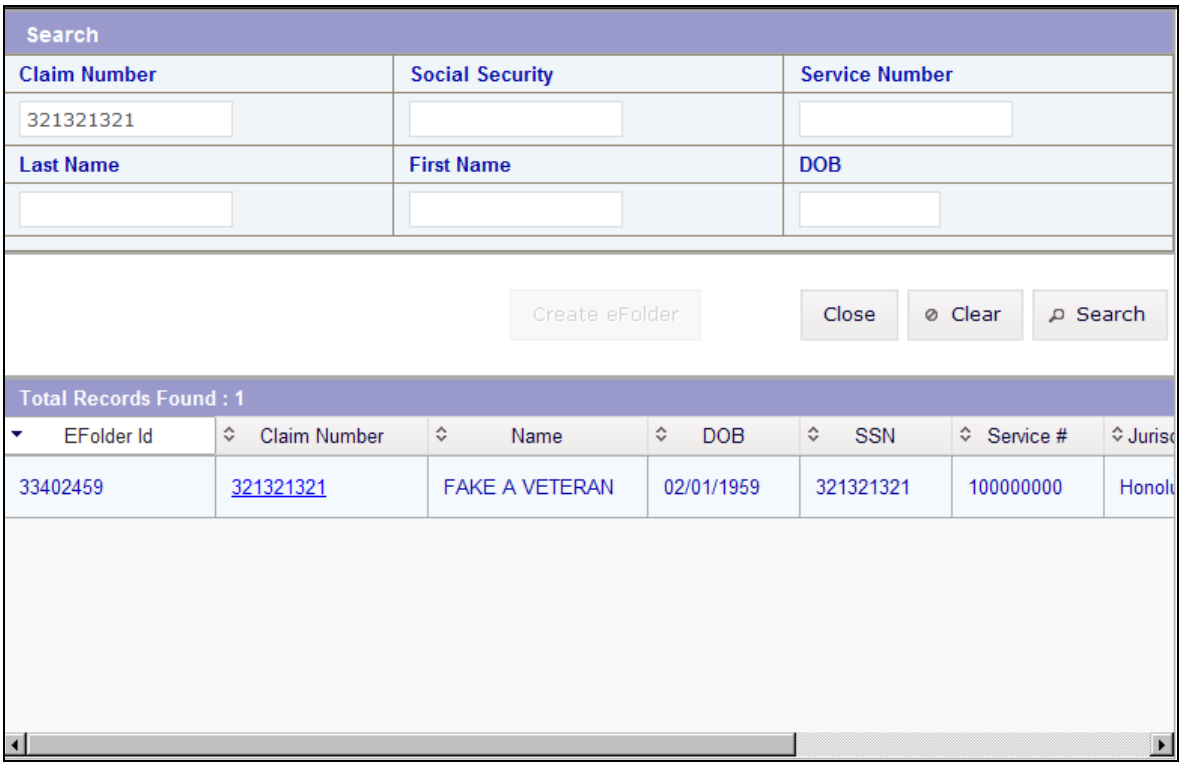


Figure 40: eFolder Search Results

To select an existing eFolder from the eFolder search results grid, click on the blue hyperlink. The eFolder search window will close and you will be redirected back to the EPA search window.

If there is no existing eFolder, but the information can be used to create an eFolder, the "Create eFolder" button will be enabled.

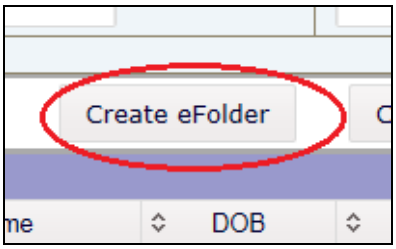


Figure 41: Create eFolder Button

Upon clicking the "Create eFolder" button, a "Create eFolder" window will appear displaying the following un-editable information: Claim Number, SSN, Service Number, Last Name, First Name, Middle Name, and DOB.

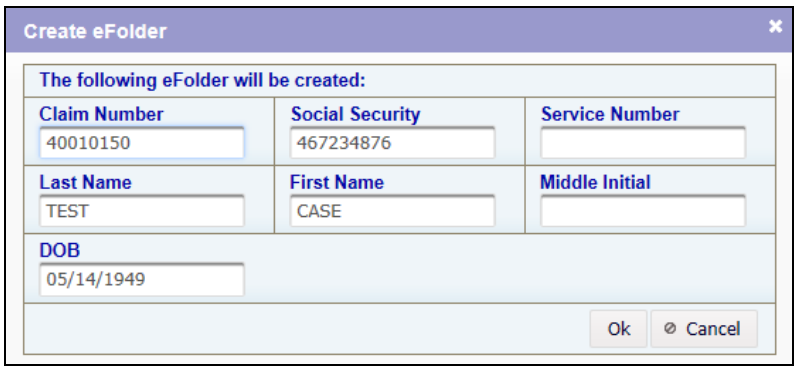


Figure 42: Create eFolder Window

To cancel eFolder creation, press “Cancel” to bring focus back to the Search for eFolder screen. Press “Ok” to create your eFolder.

Figure 43: “Ok” and “Cancel” Buttons

Upon selecting “Ok”, the “Create eFolder” window will close and a message will display stating that a new eFolder has been created with the new ID displayed.

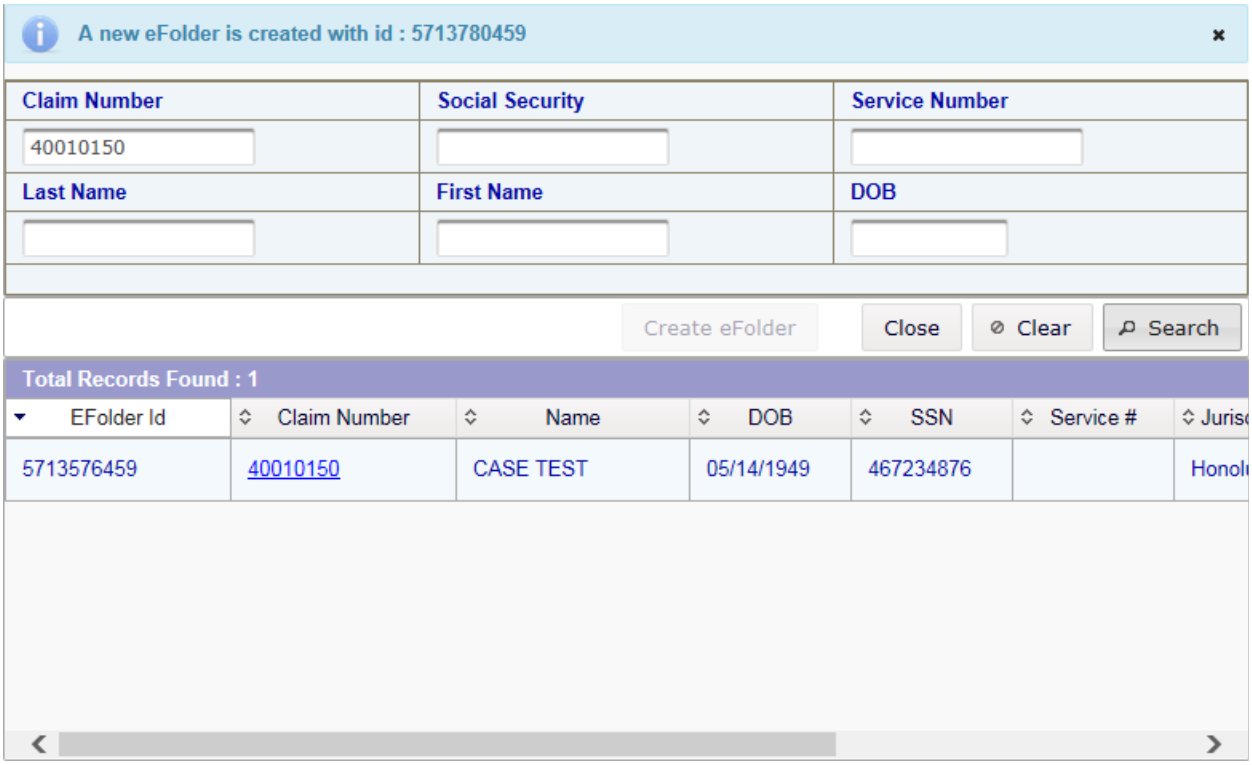


Figure 44: "Create eFolder" message

The Search eFolder window will automatically refresh and the newly created eFolder will display as a blue hyperlink. Select the eFolder by clicking on the hyperlink.

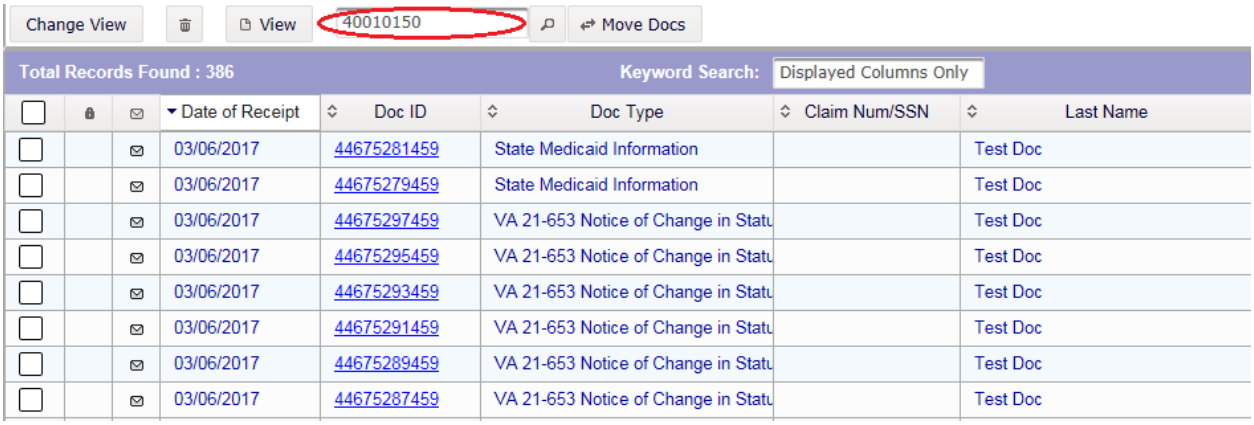


Figure 45: EPA window with eFolder found

Notice that the eFolder you selected appears in the eFolder search field. Now, with the destination eFolder selected, you will be able to move documents into this eFolder.

Although the **Move Docs** feature is most commonly used to move multiple documents at once, you can also move single documents.

5.4.4 Deleting a document

Documents can be deleted from the EPA either individually from within the document viewer, or in bulk from the EPA window.

While viewing the document you want to delete, you will notice a **Delete** button at the top of the Document Grid.

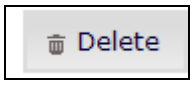


Figure 46: Delete Button

To delete the current document, click the **Delete** button. A dialogue box will display asking if you are sure you want to delete the document. If yes, you will be required to select a reason. Click on the arrow to the right of the field and the drop-down menu will display.

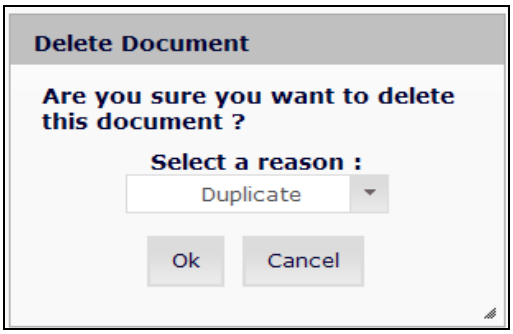


Figure 47: Delete Document Reason Prompt

Once you have selected a reason, press **OK**. The document will delete. For more information on deleting documents within the document viewer, refer to the Legacy Content Manager eFolder User Guide.

You also have the option to perform a **Bulk Delete**, which is deleting multiple documents at once. This functionality is only available from above the Document Grid. To delete multiple documents at once, select the documents by clicking the field in the '**Select**' column, then select the garbage can icon . If you would like to delete all documents displayed within the Document Grid, you can use the '**Select All**' feature, and then select the garbage can icon.

It is important to note that the bulk delete option can only be used to delete documents with a status of "expired military file". If you attempt to delete any documents that are not marked as a military file with an expired status, an error message will display.

5.4.5 Splitting a Document

You will notice that while in the document viewer, there is an option to **Split** a document. This split page functionality within the EPA is the same as within the Legacy Content Manager eFolder.

Figure 48: Split Button

To split a document, open up the document you intend to split. Within the Doc Viewer, select document pages to **Split** by pressing down the CTRL key while selecting specific pages with your mouse cursor. The pages selected will highlight on the bottom right-hand corner in yellow.

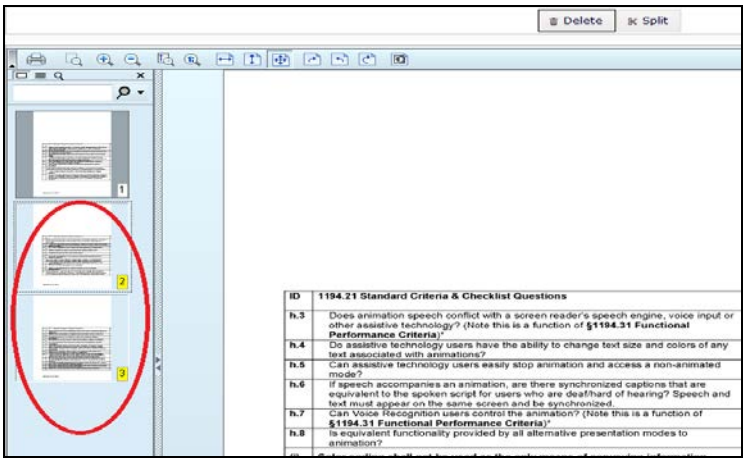


Figure 49: Selected Pages in Doc View

To **Split/Move** – After pages are selected, click the **Split** icon located on top of the Doc Viewer. A pop up screen will display. From there, select the **Move** radio button, and the Document Type for the document pages to be moved. Select the **OK** button and a pop up screen will disappear with a message displaying a successful move and you will be returned to the Doc Viewer. Click the **Next** button to save all changes and the Doc Viewer will close and refresh.

To **Split/Copy** – Procedure will be identical to **Split/Move**, only, you will select the **Copy** radio button.

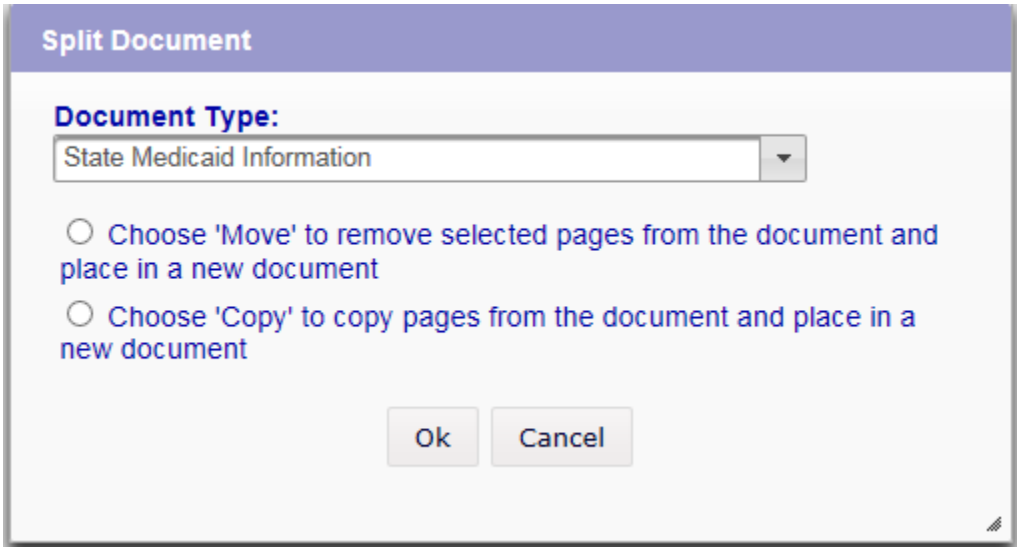


Figure 50: Split Document Select Screen

After you select **Next**, the Document Viewer will close and the Document Grid will refresh to reflect the new documents moved or copied over. To find your new document, simply sort by Doc ID to find the newly inserted document or by Doc Type.