Second Opinion Enterprise Sharing and Exporting

Table of Contents

Sharing Content

Users logging into the Enterprise Portal are associated with Sites and can see the Patients associated with these Sites. Enterprise Sharing was created to allowing the of sharing of Patient content with Users of the Portal that do not have direct access to this content. This includes external public User accounts that are not associated with any Site on the Portal.

Launch Sharing Tool

Once successfully logged into the Portal, navigate to the content to be shared. If the **Dashboard** is displayed, **click** on the **Review Home** tab, then **click** the **Start Sharing** icon.
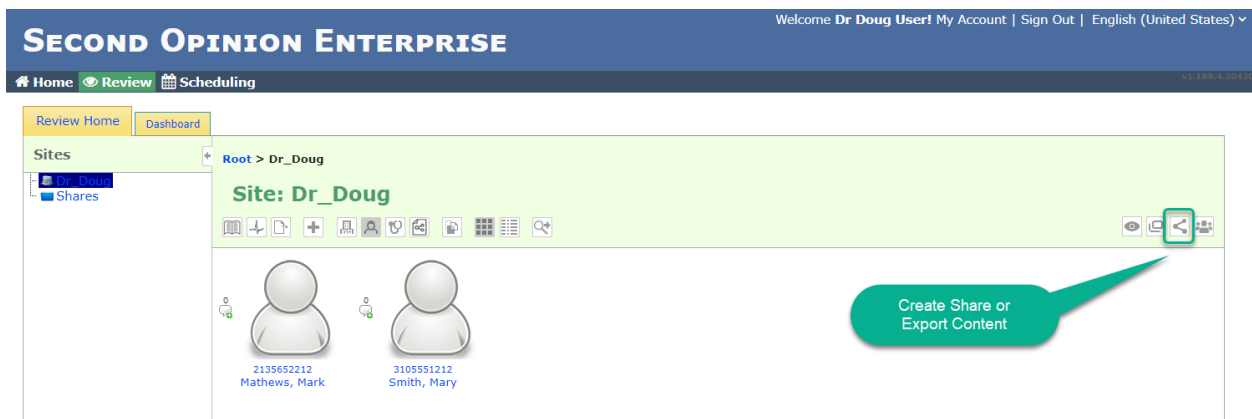
Once the sharing tool is activated, check boxes appear in the top left corner of each item displayed. Click on all of the items to be shared. Selected items appear on the right side of the screen in the **Create Share** section.

Entire Folders can be shared or individual Documents, there is no restriction on what can be shared. The selected items can be from different Folders as well as from different Sites.

When finished selecting items, **click Create Share**.

Create Share Editor

The Create Share Editor manages the creation of the Share. Is it an **Open Share**, anyone that clicks the share link can claim it or is it a **Restricted Share**, it is available to a select group of users. It also manages how long the share will be active. The Share can be sent to **Users** of the Portal or **Users by Email**. **Users by Email** allows for the sharing of content to Users who do not have direct access to the content contained in the Share, this can include external public Users that do not have a typical portal account.

When the share is created, a link to the share is defined and sent to all selected users.
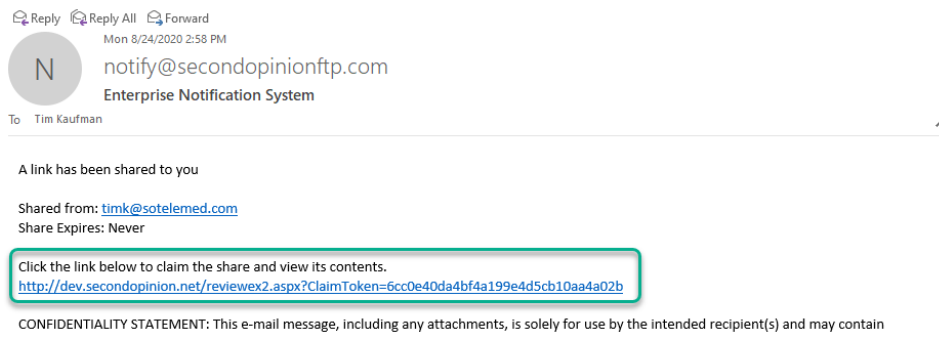
Accessing / Claiming Shares

If you received a notification that a Share has been assigned to you, clicking the link contained in the notification will launch the Portal login screen.

Note: You must have a User account to access a Share. If you do not have one, **click Register** to create an external public User account. See **Create External Public User Account** below for more information.
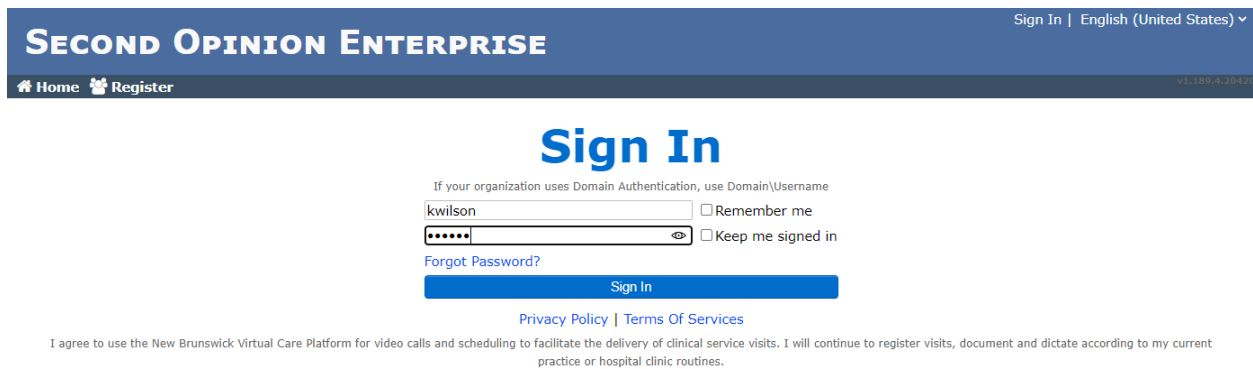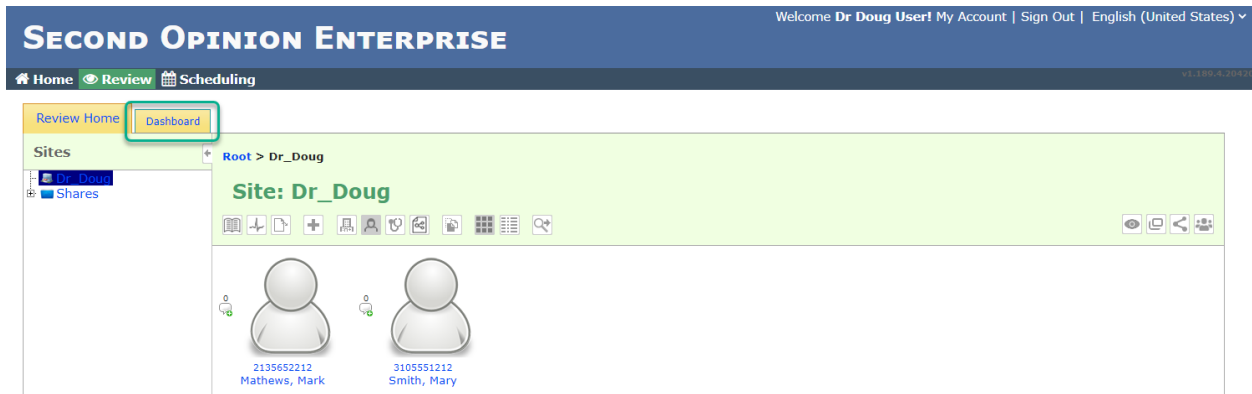

Once successfully logged in, the Share will be claimed and will be visible in the **Shares** site.

Note: Open Shares must be claimed to show up in your User account, **Restricted Shares** are claimed automatically when logged into the Portal.
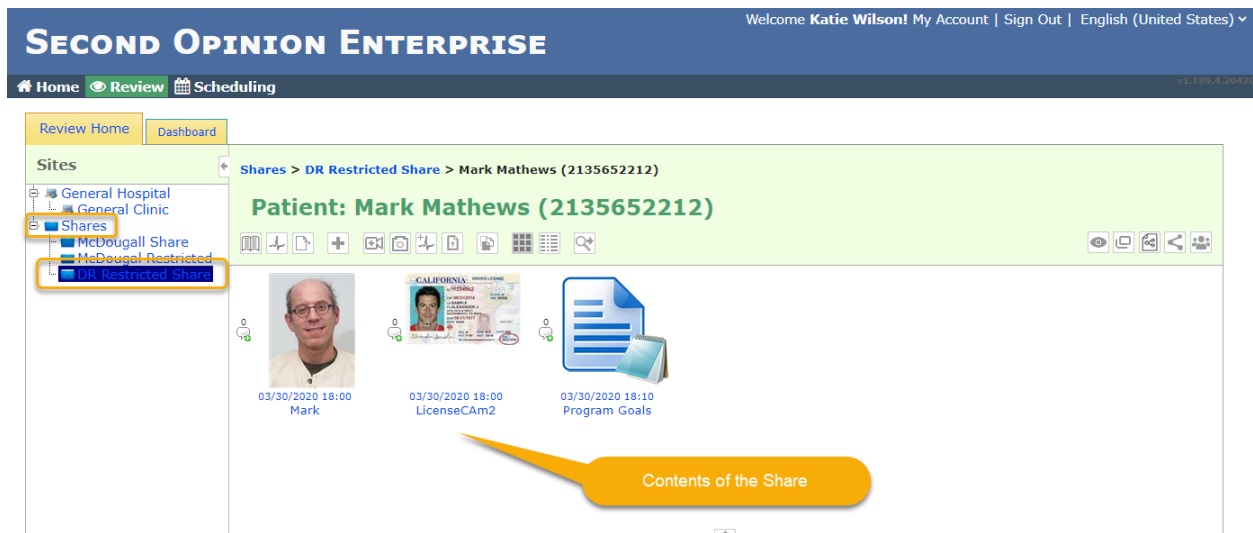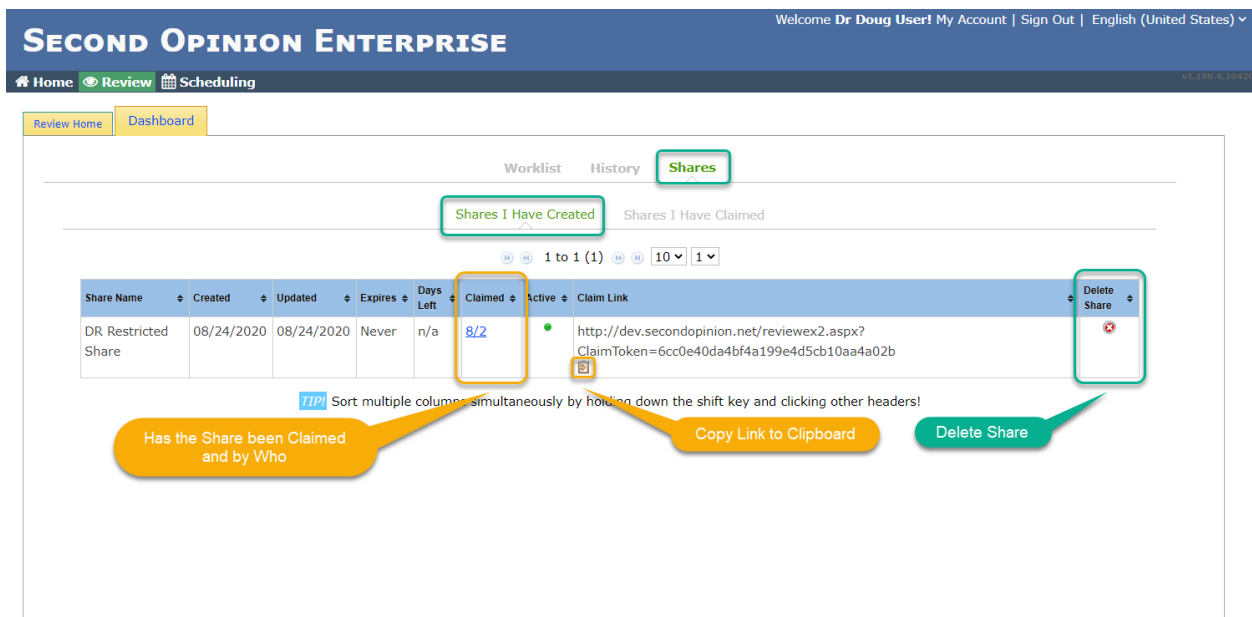
Manage Shares

To manage Shares you have created or claimed, navigate to the **Dashboard**. From the **Review** page, **click** the **Dashboard** tab.
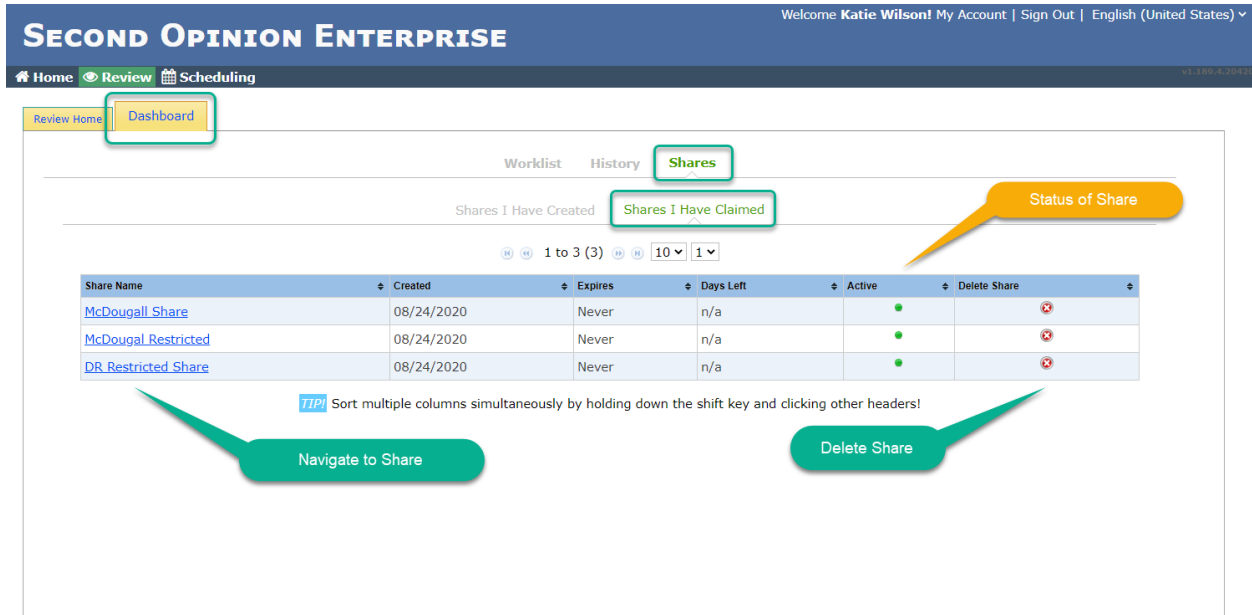

Next **click Shares**. To manage shares you have created, **click Shares I Have Created**. The share dashboard entry displays all of the information about the Share, who has **Claimed** it and the **Claim Link** itself. The Share can be also be deleted.

Note: Once a share has been deleted, it is no longer be accessible to any user.

To view / manage all of the shares you have claimed, **click Shares I Have Claimed**. The share dashboard entry displays all of the information about the claimed shares. **Clicking** the **Share Name** will navigate to the contents of the Share and **clicking Delete Share** will remove it from your shares.

Create External Public User Account

If you click on a share link, it will take you to the Portal **Sign In** page. If you do not have a User account, **click Register** to create one.

Note: An external public User account can only access shares that have been claimed.

Fill in the appropriate User information and **click Save Changes**.

When finished, **Click Save Changes**.

Note: Before the new User account can be used, it has to be verified. Click on the verify email link sent to the entered email address to validate your new account.

Once the User account has been validated it can be used to log in and access the Share.

Exporting Content

The Enterprise Export tool allows for the exporting of Enterprise content to the local computer. When initiated, all of the selected content is packaged in a Zip file and downloaded. Once the file is downloaded, the contents of the Zip can be extracted and the individual files can be used separate from the Enterprise Portal. It is up the individual person to maintain the integrity and security of these files as they are no longer managed by the Portal.
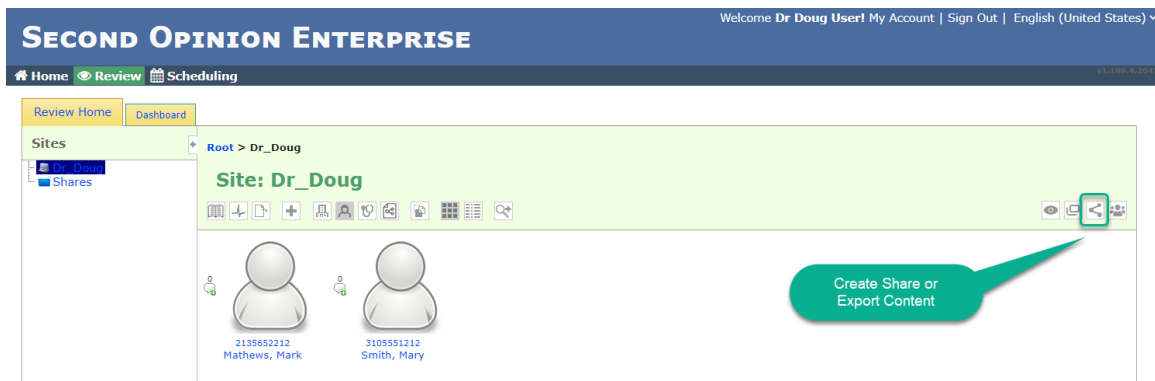
Select the content to be exported and **click Export**.
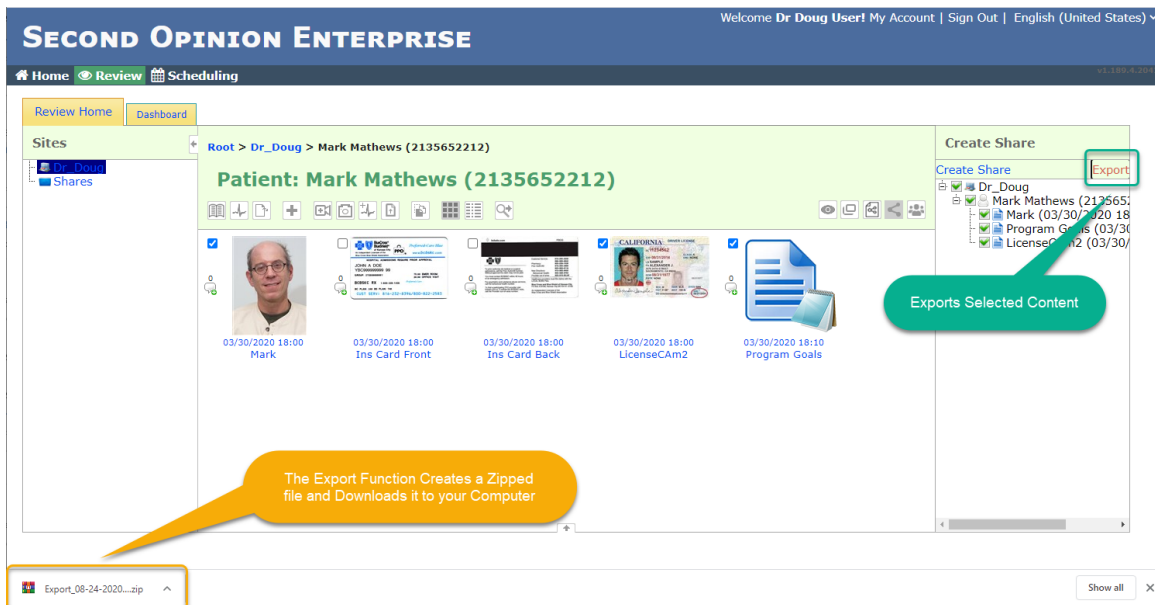
Note: Entire Folders or individual Documents can be selected but, only the content that is file based will be exported, no form data. The selected items can be from different Folders as well as from different Sites.
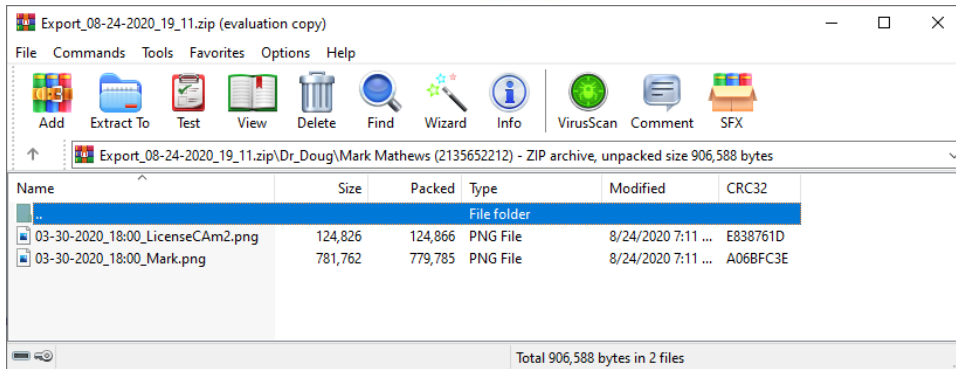
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