# theSource - Feature User Guide

[Accessing theSource](#_Toc185943065)

[Icons – Document Types](#_Toc185943066)

[Icons - Other](#_Toc185943067)

[theSource Home Page Layout](#_Toc185943068)

[Establishing a Profile](#_Toc185943069)

[Search](#_Toc185943070)

[Acknowledgments](#_Toc185943071)

[Subscribing to a Document](#_Toc185943072)

[Viewing Subscribed Documents](#_Toc185943073)

[Favorites: Saving a Search to Favorites](#_Toc185943074)

[Document Details and Comparing Version Changes](#_Toc185943075)

[Client Information Form (CIF) Search and Navigation](#_Toc185943076)

[Feedback](#_Toc185943077)

[Recently Viewed](#_Toc185943078)

[Logging Out](#_Toc185943079)

[theSource Offerings for Business Partners](#_Toc185943080)

[Related Documents](#_Toc185943081)

**Description:** This Job Aid provides information about **theSource** and its features.

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| Accessing theSource |

**TheSource** is a document repository providing access to a variety of documentation to help you in your role, such as announcements, work instructions, job aids, training material, and client information.

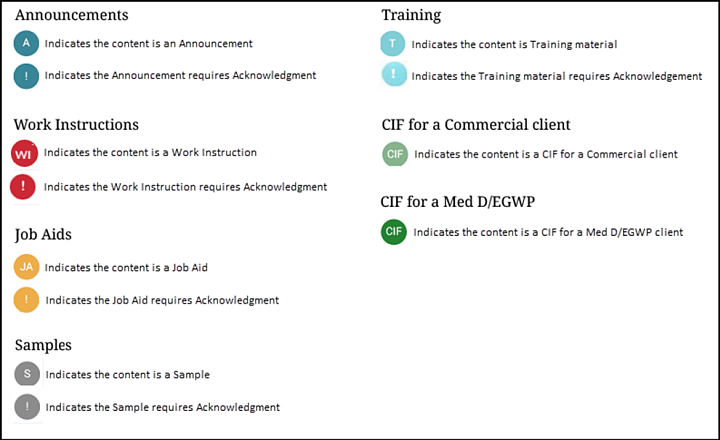
Follow the steps below to access theSource:

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| **Step** | **Action** |
| **1** | Open Google Chrome. |
| **2** | Access **theSource** via the following URL:  <https://thesource.cvshealth.com/nuxeo/thesource> |
| **3** | Enter your network ID and password on the login page.  If you have already logged into LearningHub, P&P Portal, or myLife, you may be able to access theSource without re-entering your login credentials. |
| **4** | The homepage for **theSource** will display. You may now begin using **theSource**.    **Note:** If this is your first time logging in, you will receive a prompt to enter your name for a personal greeting. This can be changed at any time from within the Profile panel. |

[Top of the Document](#_top)

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| Icons – Document Types |

There are various document types within **theSource**. Refer to the table below for the descriptions of each and the icons associated with them.



[Top of the Document](#_top)

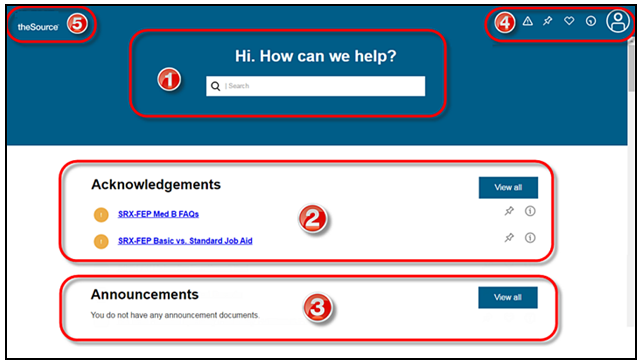
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| Icons - Other |

Reference the table below:

|  |  |
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| **Type/Icon** | **Description/Icon** |
| **Acknowledgement Queue** | * When new acknowledgements are placed into your queue, the icon will display an orange circle next to it:        * Acknowledgements are critical or time sensitive updates that require your attention. * Each acknowledgement will remain in your queue until you have completed it. |
| **Attachment** | Add an attachment to a feedback message:   * Images * Files * Spreadsheets * Etc. |
| **Delete** | Removes the item from the list. |
| **Favorites** | Favorites queue: Providesa repository of all previously added favorite searches. |
| **Feedback** | Feedback icon present within each document. Click to open the Feedback form. |
| **Information** | Provides information about the document, such as Description, Audience, Classifications, and Change History. |
| **Profile** | Provides information on the user and ability to manage Profiles. |
| **Recently Viewed Documents** | Provides a history of previously viewed documents. History is stored for seven days. |
| **Subscription** | The subscription pin icon is unshaded when a document is not subscribed. |
| The subscription pin icon is shaded when you subscribe to the document. |
| **Subscription queue:** The subscription pin icon at the top of theSource providesa list of all your subscribed documents.    **Subscription queue alerts:** When one of your subscribed documents is updated, the icon will display an orange alert. |
| **Alert** | Identifies important information, warnings, and cautions. |
| **Speech Bubble** | Identifies talk tracks and suggested verbiage for user when giving advice or delivering instructions. |
| **Yellow Flag**  **image2s** | Identifies document updates.  **Note:** Details regarding updates are available in the Change History. |

[Top of the Document](#_top)

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| theSource Home Page Layout |



Reference the table below:

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| **Section** | **Description** |
| **1 -** [**Search**](#_Search) | Used to search for documents within **theSource**. |
| **2 -** [**Acknowledgments**](#_Announcements) | **Acknowledgements** are documents of importance that should be read thoroughly and require electronic acknowledgement.   * The **Acknowledgements Queue** alerts you to documents that require your attention. * Use the **View all** and **View less** buttons to expand and collapse the list as needed. * Each acknowledgement will remain in your queue until you have acknowledged the item. |
| **3 - Announcements** | The **Announcements** section of **theSource** Home Page displays special communications, alerts, and reminders.   * Announcements are short-term notices published typically for 30 days. * Use the **View all** and **View less** buttons to expand and collapse the list as needed. |
| **4 – User Features**     1. Acknowledgement 2. Subscriptions 3. Favorites 4. Recently viewed 5. Profile | Click a hyperlink for more information about **theSource** features:   * [Acknowledgments](#_Acknowledgments): * [Subscriptions](#_Subscribing_to_a) * [Recently viewed](#_Subscriptions) * [User profile](#_Establishing_a_Profile) * [Logging out](#_User_Profile) |
| **5 - theSource Logo** | Click the logo at any time to return to the **Home Page**. |
| **6 – Banners** | Banners are images displayed at the bottom of the Home Page in theSource and can link to another document, as needed. Banners:   * Share information about software enhancements * Highlight projects in flight * Increase awareness of a process * Communicate a resolution to a pattern of error occurring * Can be a friendly reminder or clarification to help reduce errors or for quality control * Can be part of the Keep Learning Alive (KLA) offerings. |

[Top of the Document](#_top)

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| Establishing a Profile |

Refer to [theSource - Profile Settings Reference Guide (Personal Settings) (017625)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d2e37c4f-7320-473f-95cb-cf06e42e8104) for more information.

Follow the steps below:

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| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | Reference the table below: | | |
| **If you support…** | | **Then…** |
| A specific department, position, and in a designated location | | Create a profile that aligns with your role. It should be your primary setting for utilization of **theSource**. Refer to [New Profile](#manage_2). |
| Shared services that supports multiple departments and positions and need to browse various content | | Use the [Current](#CurrentTab) tab to select temporary settings. |
| **2** | Click the **Profile** icon in the upper right of the screen.    **Result:** First time users will see **No Active Profile Selected**.    Reference the table below: | | |
| **If establishing…** | **Then…** | |
| **New Profile** | Reference the table below: | |
| **Step** | **Action** |
| **1** | Click **Manage**. |
| **2** | Hover over a Profile; click the pencil icon to expand to the category list.    **Result:** Five categories display:   * Business Area * Department * Line of business * Position * Facility   **Note:** For each of the categories, follow Steps 3 and 4, repeating as necessary for any category that requires features to be selected. |
| **3** | Click the **>** to expand the category. |
| **4** | By default, all options are selected.   * Click the “Select all” option at the top to clear the checkboxes and then select only the ones you need. * Click **Save Setting**.     **Result: Settings Updated** displays.    **Note:** Repeat this process for each of the five categories as necessary.  **Tips:**   * Do **not** use the “Select all” option when establishing a Personal Profile as it increases the likelihood of intermittent system clocking (receiving the “spinning wheel” or “clocking” when performing a search).      * If you want to see everything for a category, **make no selection**.  This results in the same outcomes as using “Select all” but with no risk of intermittent system clocking.      * If you have one job, it is best to have just a single Personal Profile established with specific selections for each category (Business Area, Department, Line of Business, Position, Facility). * If appropriate for your job, make a selection for “Position” as part of your Personal Profile Setting.  Do **not** use “Select all.” * If appropriate for your job, select for “Facility” as a part of your Personal Profile Setting. Do **not** use “Select all.” |
| **5** | Click the **Set as Default** button if the profile is to be the default Profile for all future visits to **theSource**.    **Result: Settings Updated** displays. |
| **6** | Click the **<** to return to the Profile list. |
| **7** | Click the circle for the Profile to activate it.    **Result:** The page will update to indicate the Profile is selected and active.    **Note:**  To remove a profile, click the pencil icon next to the profile and move the “Reset” slider to the right. This will “reset” the Profile by clearing any of the settings you had selected. You can reuse the Profile number again if needed. |
| **Current Settings** | Reference the table below: | |
| **Step** | **Action** |
| **1** | Click **Current**.    **Result:** Five categories display:   * Business Area * Department * Line of business * Position * Facility   **Note:** For each of the categories, follow Steps 3 and 4, repeating as necessary for any category that requires features to be selected. |
| **2** | Click the **>** to expand the category. |
| **3** | Click the appropriate boxes for your specific position; then click **Save Setting**. Repeat for each category.    **Result: Setting Updated** displays.    **Tips:**   * Do **not** use the “Select all” option when establishing a Personal Profile as it increases the likelihood of intermittent system clocking (receiving the “spinning wheel” or “clocking” when performing a search). * If you want to see everything for a category, **make no selection**.  This results in the same outcomes as using “Select all” but with no risk of intermittent system clocking.      * If you have one job, it is best to have just a single Personal Profile established with specific selections for each category (Business Area, Department, Line of Business, Position, Facility). * If appropriate for your job, make a selection for “Position” as part of your Personal Profile Setting.  Do **not** use “Select all.” * If appropriate for your job, select for “Facility” as a part of your Personal Profile Setting. Do **not** use “Select all.”   **Note:** Repeat this process for each of the five categories as necessary. |

[Top of the Document](#_top)

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| Search |

Follow the steps below:

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| **Step** | **Action** | |
| **1** | Access **theSource**. | |
| **2** | Click the **Search** field.    **Result: Search** bar appears at the top of the page. | |
| **3** | Enter Search criteria in the box and press **Enter** or the **Find** icon to Search.  The search feature researches documents based on full text, document name, Content ID, etcetera.    **Result:** Search results will display on the page or within the drop-down menu for quick selection.  Searches can be filtered by clicking any of the following Search types from the drop-down and entering text in the field: | |
| **Search** | **Description** |
| **1** | **Search:** Searches all documents. |
| **2** | **Perform:** Searches work instructions, job aids, samples, etc. |
| **3** | **Learn:** Searches training materials. |
| **4** | **Client:** Searches CIFs and other client related material. |
| **4** | Select the appropriate document from the list by clicking on the title hyperlink or apply additional filters to narrow down the results.    **Additional search filter options include:**   * **Sort by –** Sort the results by Relevance, Date Modified, or Title. * **Search classifications/data facets –** Click to expand the categories and check/un-check boxes for dynamic filtering of the search results based on the options listed.   + Document Type   + Subject   + Process   + Training   + Client   + Segment   + System   + Modified Date | |

[Top of the Document](#_top)

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| Acknowledgments |

To remain informed of the changes occurring within a business area, when a document is updated or new critical and time sensitive information needs to be shared, an acknowledgement ensures the information has been read.

To review a document in your acknowledgement queue, follow the steps below:

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| **Step** | **Action** |
| **1** | View your acknowledgement queue. There are two locations in theSource where you can find your queue. Acknowledgements are listed in order by publish date, with the most recent at the top.   * **TheSource Home Page**   + The five most recent acknowledgements will be listed by default.   + If you want to view the full list of pending acknowledgements, click **View all** to expand the queue. It may take some time for the page to load if you have many acknowledgements in your queue.      * **The Acknowledgment Queue icon**   + This icon is available at the top of any page in theSource.   + When new acknowledgements are placed in your queue, the icon will display an **orange** alert.   + The **Open** tab contains all documents pending your acknowledgement.   + The **History** tab contains all acknowledgments you have completed in the past. |
| **2** | Select an acknowledgement in the queue by clicking the document title.  **Result:** The document opens. |
| **3** | Review the document. |
| **4** | Click **Acknowledge** at the bottom of the document.    **Result:** A confirmation message displays stating **Document Acknowledged**.    If there are additional acknowledgements in your queue, the **Next** button will display. Click the **Next** button to load the next acknowledgement.    **Result:**  The most recent acknowledgment in your queue will display for your review and acknowledgement. This feature allows you to work continuously through your acknowledgement queue without having to return to the Home Page or queue to manually select the next document. |

[Top of the Document](#_top)

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| Subscribing to a Document |

Documents can be subscribed to from the Home page or search results, as well as from within a document.

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Locate the **pin** icon for the document you want to add to your subscriptions.  **Note:** If the icon is unshaded (white), then you have not yet subscribed to the document. If it is shaded (gray or blue), then you have already subscribed to it. | |
| **If you are...** | **Then...** |
| On the Home page or search results | The pin icon is located to the right of the document title. |
| Within a document | The pin icon is on the right side of the navigation bar at the bottom of the document. |
| **2** | Click the **pin** icon.  **Result:** The icon will now display as shaded (gray on Home page/search results, blue within the document). You will now receive alerts when the document has been updated.    **Note:** To unsubscribe to a document, simply click the shaded icon. It will change back to unshaded (white), and a confirmation message will display to confirm the document was unsubscribed successfully. | |

[Top of the Document](#_top)

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| Viewing Subscribed Documents |

Perform the steps below:

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| **Step** | **Action** |
| **1** | Click the **pin** icon in the upper right at the top of any page in theSource.  **Note:** When one of your subscriptions is updated, an orange alert will display next to the pin icon. |
| **2** | Click the **Alert** or **Manage** tab to view your subscriptions.   * The **Alert** tab shows which documents have been updated.   + Open and view a document to clear the alert from the tab.   + View all your subscription updates to clear the orange alert, so you’ll know when new ones come in. * The **Manage** tab lists all your subscriptions. Keep this up to date by removing any ones you no longer need. |

[Top of the Document](#_top)

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| Favorites: Saving a Search to Favorites |

Search criteria can be saved as a Favorite. This is helpful for searches that you complete often, as it saves the search keywords and filters for quick access later, rather than having to apply the filters each time you search for that information.

**Note:**  If you wish to save a specific document as a Favorite, this is done by using Google Chrome bookmarks. Refer to [theSource Bookmarks in Google Chrome (015435)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3eb68d2a-1f2b-4bef-8ef1-fbba50790e85) for details.

Perform the steps below to save a search in theSource:

|  |  |
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| **Step** | **Action** |
| **1** | Conduct a search in theSource and customize it as needed. For example, your search may include combination of:   * Keywords * All, Perform, Learn, or Client filters * Search classifications/data facets (checkboxes to the right) |
| **2** | Click **Save Search**. |
| **3** | Enter a title for the search on the line and click **Save**.    **Result: Saved Successfully** confirmation message displays. |
| **4** | To access your Favorite Searches:   * Click the **heart** icon in the upper right at the top of any page in theSource. * In the window, click on the **search title** to run the search. |

[Top of the Document](#_top)

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| Document Details and Comparing Version Changes |

This feature allows you to view detail of a document or compare a previous version with the current version.

Perform the steps below:

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| --- | --- | --- | --- | --- |
| **Step** | **Action** | | | |
| **1** | Locate the **information** icon for the document you want to view details about. | | | |
| **If you are...** | | **Then...** | |
| On the Home page or search results | | The **information** icon is located to the right of the document title. | |
| Within a document | | The **information** icon is on the right side of the navigation bar at the bottom of the document. | |
| **2** | Click the **information** icon.  **Result:** The **Details** and/or **Change History** tabs display in a window to the right and contain the following information about the specific document, if applicable:  **Details tab:**   * Client code * Plan ID * Content Type * Description * Audience   + Client Access Control   + Business Area   + Department   + Line of Business   + Position   + Facility * Classifications (search data facets)   + Client   + Document Types   + Process   + Segment   + Subject   + System   + Training   **Note:** The **Details** tab is not applicable to Client Information Forms (CIF). | | | |
| **3** | Click the **Change History** tab to view details about the versions of the document.   * For CIFs, this tab will display automatically when clicking the **information** icon.   **Result:** Information for up to the three most recent versions will display. Each version will display:   * Document version number * Date the version was published * Text providing a summary of the changes in that revision (not applicable to CIFs) * Option to compare the current version to previous versions of the document (if multiple versions are listed) | | | |
| **4** | Select a version from the list to compare to the current version. Click **Compare to current version**.  **Result: Content – Compare Report** pop up displays. | | | |
| **5** | Review the features below for the Compare Report, based on the document type.  Reference the table below: | | | |
| **Document Type** | **Description** | | |
| **Client Information Form (CIF)** | The CIF compare report will display the information in three columns.   * Left side – the name of the field in the CIF * Middle – the information present for that field in the current version * Right side – the information present for that field in the prior version that is being compared   **Note:**  Only fields that had changes will display in the compare report: | | |
| **If the information is…** | | **Then this indicates that the information was…** |
| Present in the middle column, and blank in the right-side column | | **Newly added** with the current version. |
| Blank in the middle column, and present in the right-side column | | **Removed** from the document in the current version. |
| **Most non-CIF documents, such as work instructions, job aids, announcements** | Most non-CIF documents will display a copy of the document with the changes tracked throughout.   1. **First:** Click to view the first difference in the document. 2. **Message:** explaining the highlighted differences between the two documents. Additions are highlighted in green, and deletions are highlighted in red. 3. **Last:** Click to view the last difference in the document. 4. **Scroll bars:**  Use these to scroll through a compared document. | | |
| **Interactive file types, such as videos or games** | These documents cannot be compared. | | |
| **6** | To exit the compare report, click the **X**. | | | |

[Top of the Document](#_top)

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| Client Information Form (CIF) Search and Navigation |

Client Information Forms (CIFs) contain information regarding how each client handles certain features of their plan. Customer Care primarily uses CIFs.

Perform the steps below:

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| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Obtain the **Client Code**.  **Note:**  The Client Code can be copy/pasted from PeopleSafe. | |
| **2** | Access **theSource** and search for the **Client Code**.   * Paste or type the Client Code into the Search box, OR * Select “Client:” in the drop-down first before entering the Client Code. This will show search results for only the Client tab where the CIFs are located.     **Result:** A list of documents matching the Client Code will display.  **Note:**  You can also try searching for the Client Name if needed. | |
| **3** | Select the appropriate **CIF**.  **Result:** The **CIF** document displays.    Reference the list below:   * [Expand All / Collapse All](#Expand_all) * [Up/Down Arrow](#Up_down)   Reference the table below: | |
| **Feature** | **Description** |
| **Expand All / Collapse All** | Used to open or close **all** of the fields. |
| **Up/Down Arrow** | Click the arrow to open or close a section. |

[Top of the Document](#_top)

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| Feedback |

Users can provide feedback on documents through the **Message** icon located at the bottom left of every document in theSource.

 Do NOT use the Compose Feedback form to report client issues that involve specific member information. Member PHI (protected health information) should never be submitted in the Compose Feedback form. There is a separate form for this purpose. Refer to [Submitting Feedback and Reporting Client Issues (002194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e454e036-8be6-420e-81d2-10b8a1394af4).

Perform the steps below:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Access a document on **theSource**. | |
| **2** | Click the **Message** icon in the lower left of the screen.    **Result: Compose Feedback** window displays in the upper right corner of the screen.  The Compose Feedback form will display the Content ID and Document Title at the top. There are options to select to classify the feedback and provide details and upload an attachment if needed. There is also a field to enter your email address (if not automatically populated) to received responses back to your messages. | |
| **3** | Select the Feedback type: | |
| **If you think the document…** | **Then select…** |
| Is great and would like to submit positive Feedback | **It’s good!** |
| Needs changes | **It needs improvement.**  **Result:** The section will prompt you to classify your Feedback further. Select the appropriate options from the list. |
| **4** | Enter your email address in the **Email** field, if it is not already populated. | |
| **5** | Type a detailed message in the **Tell Us More** field.  **Note:** This applies to both “It’s good!” and “It needs improvement” feedback types.  **Example:** | |
| **6** | Click the **paperclip** icon to add a file (optional). Make sure that the file does not contain any member information (PHI) before attaching.  **Note:** Multiple files may be uploaded. To do so, save the files on your computer in the same location and then when prompted to select a file, use Ctrl-click to select the multiple files. | |
| **7** | Click **Send** to submit your feedback.  **Result:** Confirmation message will display.    **What happens after I submit feedback?**  The Content Management Team will route your feedback to the appropriate department. Turnaround times for resolution will vary based on the request. You may receive an email if additional information is needed. | |

[Top of the Document](#_top)

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| Recently Viewed |

Follow the steps below:

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| **Step** | **Action** |
| **1** | Click the **clock** icon to view a history of viewed documents.    **Result:** A list of previously viewed documents display in a window located on the upper right of the screen. |
| **2** | Click the arrows next to **Today**, **Yesterday,** or **Older** to view documents from within those timeframes.   * The documents will display in order with the most recently viewed at the top. * Up to 7 days worth of history will display. |
| **3** | Click on any document in the list to view a document directly. |

[Top of the Document](#_top)

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| Logging Out |

**TheSource** will automatically log you out after 10 hours of inactivity.

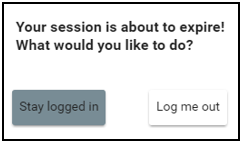


Figure 3 - Session About to Expire prompt

If you wish to logout manually, follow the steps below:

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| --- | --- |
| **Step** | **Action** |
| **1** | Click the **Profile** icon in the upper right of the screen.    **Result: Profile** window opens in the upper right of screen. |
| **2** | Click **Logout**. |

[Top of the Document](#_top)

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| theSource Offerings for Business Partners |

Examples of theSource offerings are listed below:

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| --- | --- | --- |
| **Type** | **Description** | **Sample** |
| **Announcement** | Displays special communications, alerts, and reminders.  Announcements are short-term notices published typically for 30 days. This can be extended up to 90 days, if necessary. |  |
| **Banner** | A graphical element displayed at the top or bottom of the Home Page in theSource and can link to another document, as needed. |  |
| **Index** | A list of resources by topic with hyperlinks for easy access. |  |
| **Job Aid** | A supplemental guide that supports a Work Instruction or Training. |  |
| **Keeping Learning Alive (KLA)** | Includes quizzes, games, and visuals that can be used to refresh colleagues on key concepts, critical updates, and process changes. |  |
| **Policy and Procedure** | The series of steps that cover how a workflow is completed at a high level. Dictates responsibilities to deliver a defined outcome. Also known as Standard Operating Procedures (SOP). |  |
| **Work Instruction** | Formal steps that must be followed to correctly perform a specific task or work process for a specific audience. |  |

[Top of the Document](#_top)

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| Related Documents |

[theSource - Profile Settings Reference Guide (Personal Settings) (017625)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d2e37c4f-7320-473f-95cb-cf06e42e8104)

[Submitting Feedback and Reporting Client Issues (002194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e454e036-8be6-420e-81d2-10b8a1394af4)

[theSource Resources (006162)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5df6ae0e-19e8-42f5-b096-426aa4e5bab8)

[Top of the Document](#_top)

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