

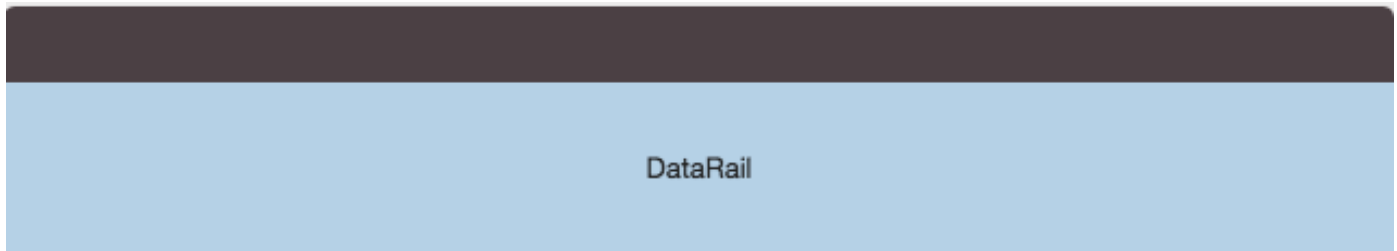


# User Manual

## Steps for Activating Your Data Rail Account

Step 1: Look for activation email coming from noreply@bcbsnc.com. (Check spam folder if necessary.)

Step 2: Select the “Get Started!” button in the email (see below screenshot).



Welcome to **DataRail**, the easy-to-use system that empowers you to share data quickly, easily, and safely. DataRail will help your organization:

- Invite members to DataRail through an automated email system
- Filter which data will be shared among a specific group of users
- Refresh uploaded data quickly and easily
- Download datasets in multiple formats, such as Excel and CSV

**Get Started!**

**DataRail** is packed with features that will streamline the way your organization shares information. This interactive data-sharing system offers you a wealth of features and is accessible any time, using any Web browser.

Sincerely,

DataRail Team

You will then be presented with the below login in screen.

- Username is assigned to you in your welcome email.
- You set your Password. It must be a minimum of 10 characters and include a lowercase letter, an uppercase letter, and either a number or special character.
- You will be asked to reset your password every 90 days. You cannot reuse passwords.
- Your account will be locked after 120 days of inactivity. To have account reactivated, send request to DG-DataRailSupport@bcbsnc.com.

Note: If you are a Provider, it is recommended you use your Blue E username to register for your new account.

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## Log Into DataRail

\*Username

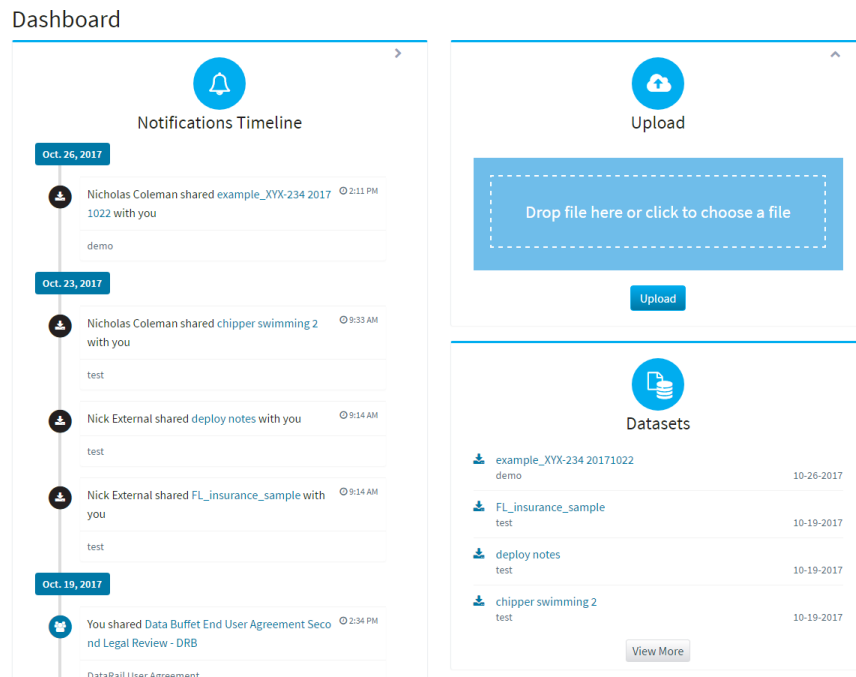
\*Password

Remember Me

**Log In**

## Navigating Data Rail Home Page

Once you've logged in, you should see a home page similar to the below image.



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Version 1.1.5-7657b1

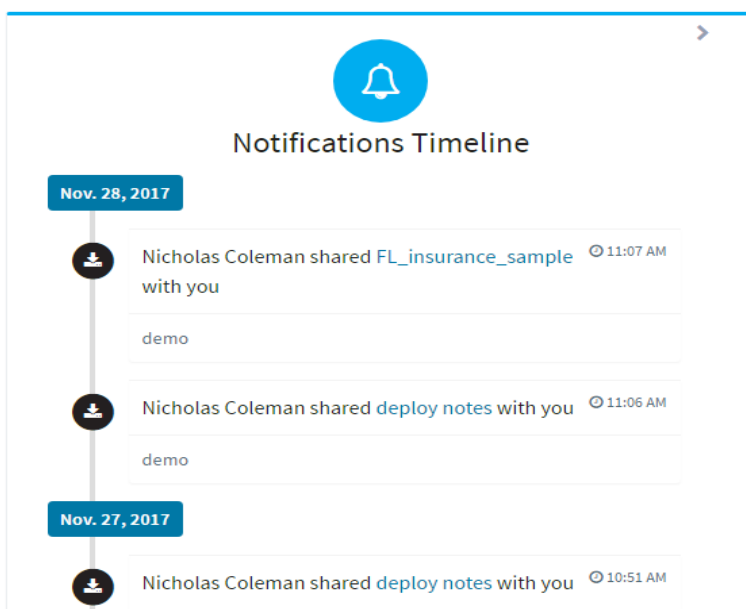
## How to Download a File

The Notifications Timeline on left side of your dashboard lists the files most recently shared with you.

Note: All activities will be traced (Download, Share, or Error) through this screen.

To download a file, select the file link (in blue font) you want:

## Dashboard



You can also find datasets (files) that have been shared with you by selecting the dataset icon (2nd icon from the left located in the upper right hand corner of your screen).



You have the option of having the datasets (files) displayed in a grid view like below or you can switch to a list view by selecting that option in the upper right hand corner of the Datasets screen.

## Datasets

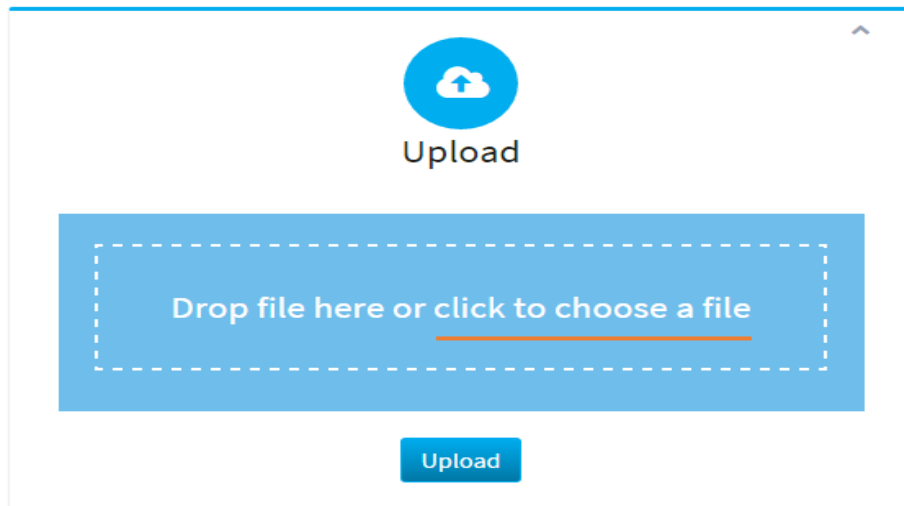
Find dataset  Q Grid List

<b>FL_insurance_sample</b> From Nicholas Coleman (Nick.Coleman@bcbsnc.com) demo <span>nick</span>	<b>deploy notes</b> From Nicholas Coleman (Nick.Coleman@bcbsnc.com) demo	<b>deploy notes</b> From Nicholas Coleman (Nick.Coleman@bcbsnc.com) demo
<b>FL_insurance_sample</b> From Nicholas Coleman (Nick.Coleman@bcbsnc.com) healthcare	<b>example_XYX-234 20171022</b> From Nicholas Coleman (Nick.Coleman@bcbsnc.com) healthcare <span>healthcare</span> <span>nick</span>	<b>FL_insurance_sample</b> 106.8 kB (999 rows) </> 11-15-2017 demo test
<b>FL_insurance_sample</b> 106.8 kB (999 rows) </> 11-14-2017 souffle	<b>FL_insurance_sample</b> 106.8 kB (999 rows) </> 11-14-2017 gumbo	<b>FL_insurance_sample</b> 106.8 kB 11-14-2017 practice 

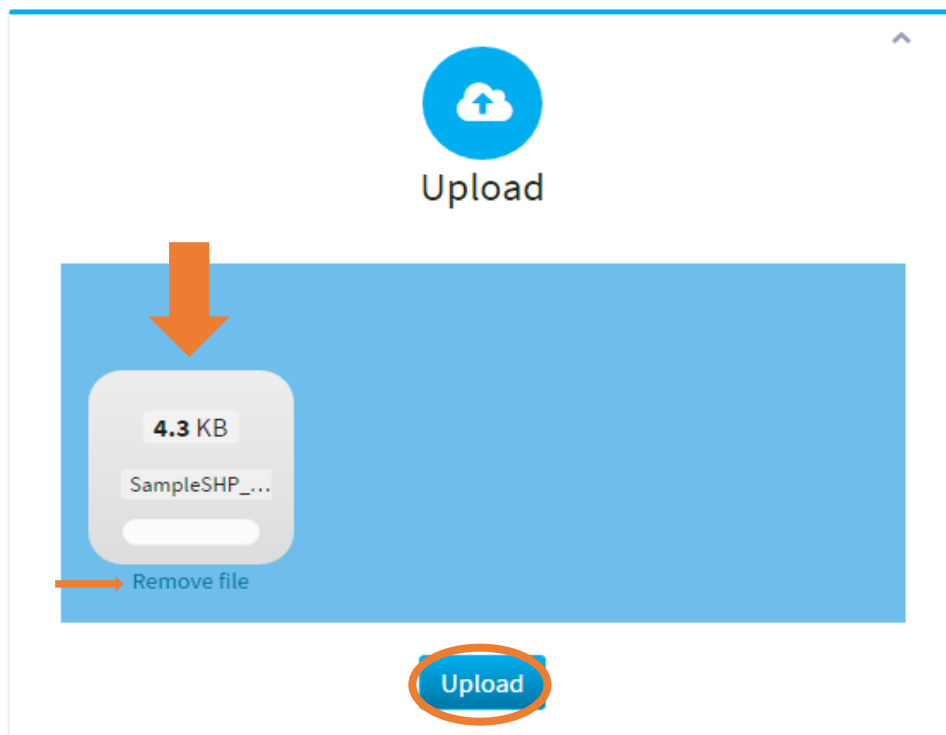
## How to Upload a File

### From Dashboard or the Upload Screen:

- Drop a file onto the large blue box OR click the link "click to choose a file".  
You can upload any file format if you have been granted permission to share files using this tool.



- The data set will appear in the blue box, indicating it is ready to upload.
- Press the rectangular Upload button.



- If you decide you don't want to upload, select the "Remove File" link beneath the data set icon.
- Once the file has uploaded, the Dataset Share screen will display.

You have the option to add tags (user defined) to make your dataset easier to search among your other files. Click on save button to save any changes made on this screen.

Select the person(s) you want to share the dataset with by clicking on their name from the list of available users associated with your DataRail account. When you are ready, select the share button.

## Dataset Share ▶ FL\_insurance\_sample

The screenshot shows the 'Dataset Share' interface for the dataset 'FL\_insurance\_sample'. On the left, there are input fields for 'Name' (containing 'FL\_insurance\_sample'), 'Dataset Description' (containing 'ext test'), 'Owner' (External Test-User), and 'Tags'. An orange arrow points to the 'Tags' field. On the right, there is an 'Access List' section with a 'Save' button and a 'Share' button circled in orange. Below the 'Access List' is a prompt: 'Please select the users with whom you want to share your data.' This is followed by two panels: 'Available Users' and 'Selected Users'. The 'Available Users' panel has a filter box and an 'Add all' button. The 'Selected Users' panel has a filter box, a 'Remove all' button, and the name 'Nick Coleman' listed below.

## Report Notifications

To view a report of all your file transactions, select the 3rd icon from the left on the toolbar located in the upper right hand of your screen.

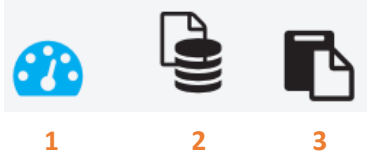


## Reports

Notifications			
	You shared <a href="#">deploy notes</a>	test	12-28-2017 10:01 AM
	<a href="#">FL_insurance_sample</a> is ready to be shared		12-28-2017 9:57 AM
	Nick Coleman shared <a href="#">FL_insurance_sample</a> with you	florida	11-27-2017 10:04 AM
	Nick Coleman shared <a href="#">FL_insurance_sample</a> with you	delegate test	9-13-2017 2:31 PM
	You shared <a href="#">FL_insurance_sample</a>	ext test	9-13-2017 2:17 PM
	<a href="#">FL_insurance_sample</a> has been uploaded and is ready to be configured for sharing		9-12-2017 8:39 PM

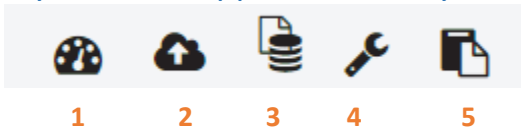
## Toolbar Overview

If you are a consumer of data, you will see the below toolbar:



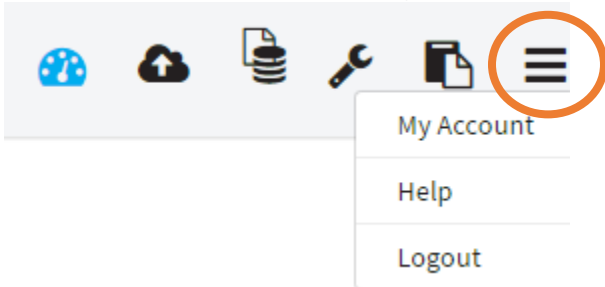
1. Select the Dashboard Icon to take you to DataRail's homepage
2. Select the Datasets Icon to take you to a list of your datasets from anywhere in the tool.
3. Select the Report Notifications Icon to view a report of all your file transactions.

If you are a supplier of data, you will see the below toolbar:



1. Select the Dashboard Icon to take you to DataRail's homepage
2. Select the Upload Icon to go to the Upload Dataset page from anywhere in the tool.
3. Select the Datasets Icon to take you to a list of your datasets from anywhere in the tool.
4. Select the Configuration icon to add tags to your data sets.
5. Select the Report Notifications Icon to view a report of all your file transactions.

For all users, click the Menu Icon (three horizontal bars) to select options from the dropdown menu.



You will be presented with the below screen when you select My Account.  
This is where you manage your information.



# My Account

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## My Info

\*Login **externaluser**

\*Email

\*First Name

\*Last Name

Time Zone

## Password

Password

Confirm Password

Minimum 10 characters  
Should contain at least 3 of the following:

- Lower case characters
- Upper case characters
- Numeric characters
- Special characters

Cannot reuse passwords

Save

The help option will display this user guide.

And the log out option will log you out of the tool and take you back to the sign in page.