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eCMS

Reviewing and Modifying Messages in an Automated Business Process

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Santéon eCMS

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ECMS PURPOSE

eCMS application provides staff access to review and handle documents that are part of an automated workflow business process. While much of the business process runs automatically, some types of errors and issues require review by staff. Documents that need staff review and action are placed in a message queue to be accessed and processed. Using the *eCMS* application, staff can:

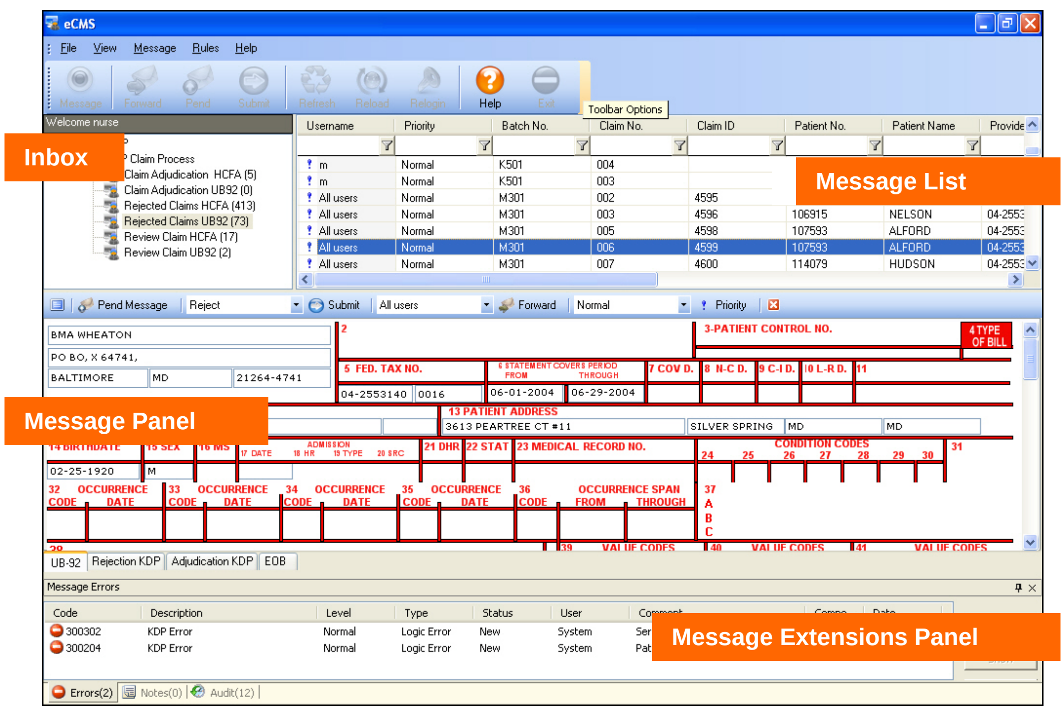
- Review and modify documents
- View, Add or perform action such as Approve error codes
- View , Add, Edit or Delete notes
- View an audit trail of the message detailing its path in the workflow
- Make decisions in real time such as Accepting or Rejecting a message
- Pend a message in user's inbox
- Forward message(s) to another user or all users
- Set the message(s) priority as high, normal or low
- Users have the option to activate/deactivate the ability to add a comment while performing any of the following actions: (Pend, Forward, or Submit) a message

NAVIGATING THE INTERFACE

PANELS

eCMS main window is divided into 4 panels:

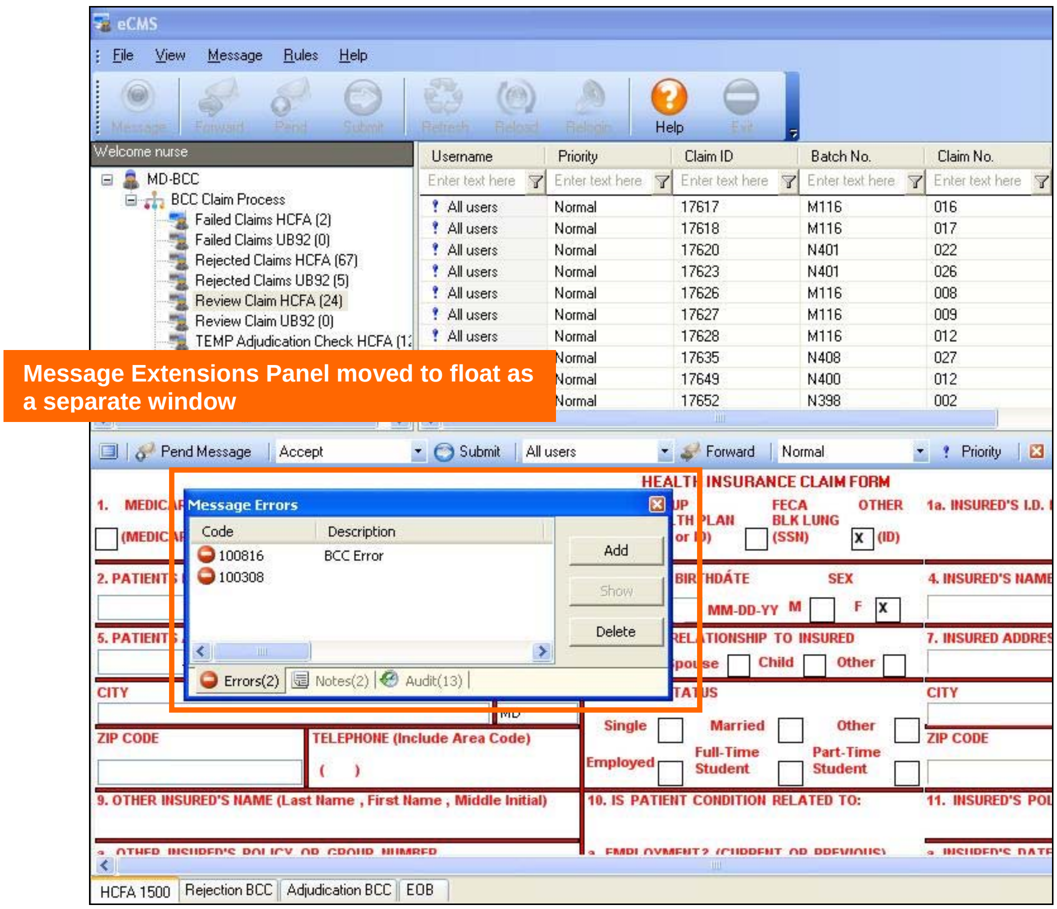
- **Inbox**: Displays all eCMS nodes in the workflows for each trading partner. The number of messages in the queue displays in parentheses next to each eCMS node for review. Select an eCMS Node to view all messages in this inbox.
- **Message List**: Displays all the messages the user is authorized to review with the ability to sort and filter the messages. View individual messages by double clicking the message itself in the Message List.
- **Message Panel**: Displays the message to be reviewed or modified in the relevant form(s). A Message Panel can contain several tabs each of which carries data about the message being viewed.
- **Message Extensions Panel**: Displays errors, notes and audit record.



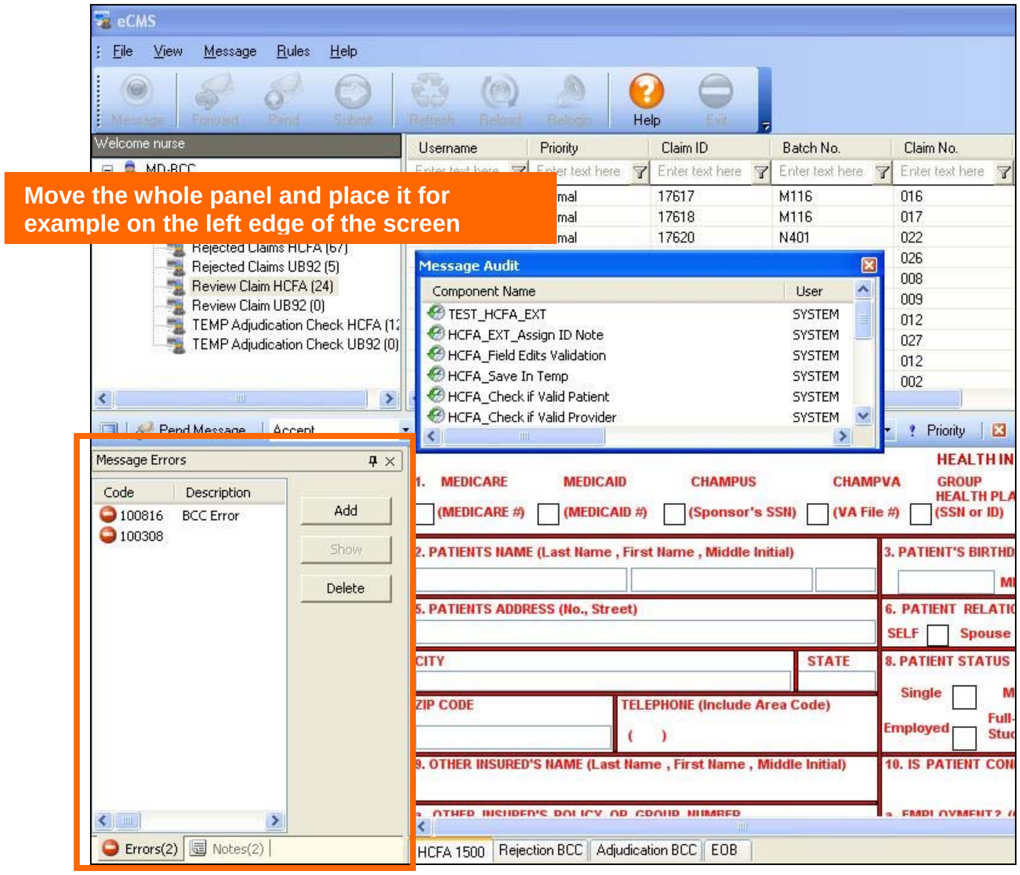
FLOATING PANELS

The Message Extensions Panel is moveable to create more room on the screen where it is needed. It is possible to move the entire panel, or its individual tabs of errors, notes and audit record. This is helpful to create additional room to view a message in the Message Panel.

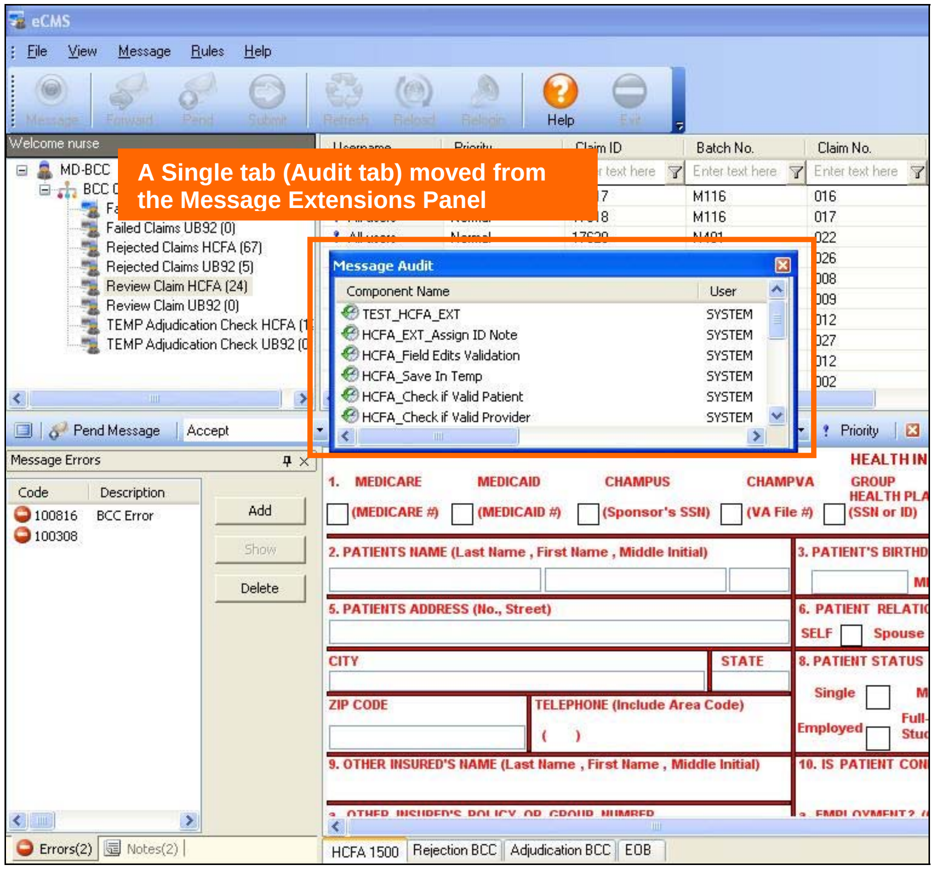
- **Move the whole panel to view as a new window.** Click the thumbtack on the Messages Extensions Panel and drag it in any desired area in the current screen, keeping you left mouse button down to move it as a separate window.



- **Move the whole panel and place it on any of the screen edges.** Click and drag the panel with its 3 tabs, keeping you left mouse button and place it on the desired edge. This is helpful to view a large form and notes or errors simultaneously.



- **Move a single tab in the Message Extensions Panel.** Click the desired tab, keeping your left mouse button pressed and place it on the desired place on your screen.



NOTE: You can close every single tab in the Message Extensions Panel from the close button on the Title bar and view it again by selecting every single tab in the View menu. For example if you close the Audit tab and want to view it again, go to the View menu, select Audit item and it will be displayed again in the Message Extensions Panel.

MENUS

File Menu

- Page Setup: Control the set up and layout options of the active form for printing.
- Print Preview: Show how the form looks when printed in number of pages. For more details refer to Printing Forms.
- Print: Print the active form. For more details on the Printing action refer to Printing Forms.
- ReLogin: Use this tab to change the user or the server host. You can also click the ReLogin button on the toolbar
- Exit: Quit the application.

View Menu

- Standard Toolbar: Open the standard toolbar where you can view message, forward, pend or submit a message. Also to refresh, reload or relogin.
- Full Screen: Open the form in the Message Panel in full screen.
- Refresh: Use this tab to refresh the messages available in the Inbox. The Inbox will refresh automatically every time a message is submitted. You can also click the Refresh button on the toolbar.
- Reload Tree: Use this tab to reload the trading partners, with their workflows and eCMS nodes. The Inbox tree will reload automatically whenever the application is opened. You can also reload the tree through clicking on the Reload button on the toolbar.
- Notes: Open the Message Notes Panel of the current message, where you can view the notes previously added or add a new note.
- Errors: Open the Message Errors Panel of the current message, where you can view the errors previously added or add a new error.
- Audit: Open the Message Audit Panel of the current message, where you can view an audit trail of the path of this message in the workflow.
- Options: Prompts you a comment when you select the check box of any of the existing actions (Pend, Forward, and Submit). This comment is prompted once you perform any of the above actions on an opened message.

Message Menu

- View: Open a message in the Message Panel Area for review. Also you can click the "Message" button from the toolbar.
- Forward: Send the message to another ECMS user or to all users.
- Pend: Save the message in your inbox to review it later.
- Submit: Send the message to one of the output ports of the selected eCMS nodes.
- Clear Filters: Clear filters of the messages headers for a selected eCMS node. .
- Clear all Filters: Clear all the filters in the messages headers of all trading partners.

Rules Menu

- View/Delete: View all the rules that currently exist in a certain eCMS.
- Add Rule: Add the “Rules” feature to automatically forward or pend incoming messages, with a certain condition that you specify to certain users.

SHORTCUT KEYS

Keyboard shortcuts are available to facilitate quicker use of the application for advanced users.

- F5: Refresh the messages available in the Inbox. (The Inbox will refresh automatically every time a message is submitted.)
- CtrL+E: Show the Errors Panel
- CtrL+A: Show the Audit Panel
- CtrL+N: Show the Notes Panel
- CtrL+P: To Print
- F11: To view a form in full screen
- Alt+F4: To Quit the application

Chapter 2 Interacting with Messages

In this chapter

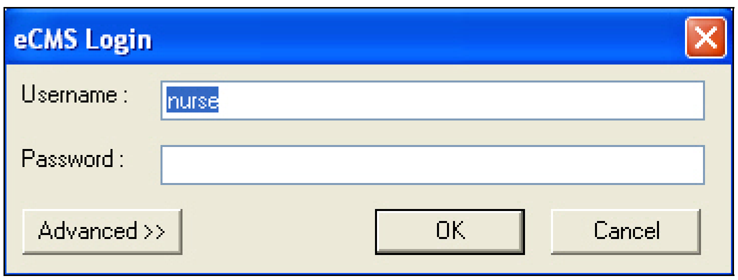
- ☐ Getting Started
- ☐ Viewing a Message
- ☐ Reviewing or Modifying a Message
- ☐ Viewing and Adding Errors
- ☐ Viewing and Adding Notes
- ☐ Viewing a Message Audit
- ☐ Printing Forms

GETTING STARTED

LOGGING IN

Enter the Username and Password provided to you by your system administrator.

NOTE: Do not change the advanced specification unless advised by your system administrator. If you have problems while logging in, please contact your system administrator.



BASIC PROCESS

The basic steps to process messages are shown below. Details for completing each of the steps are described in the following sections.

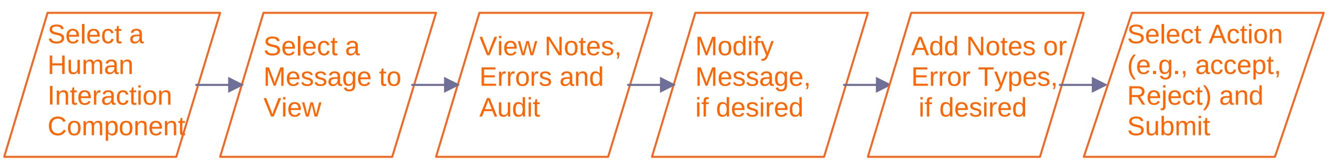
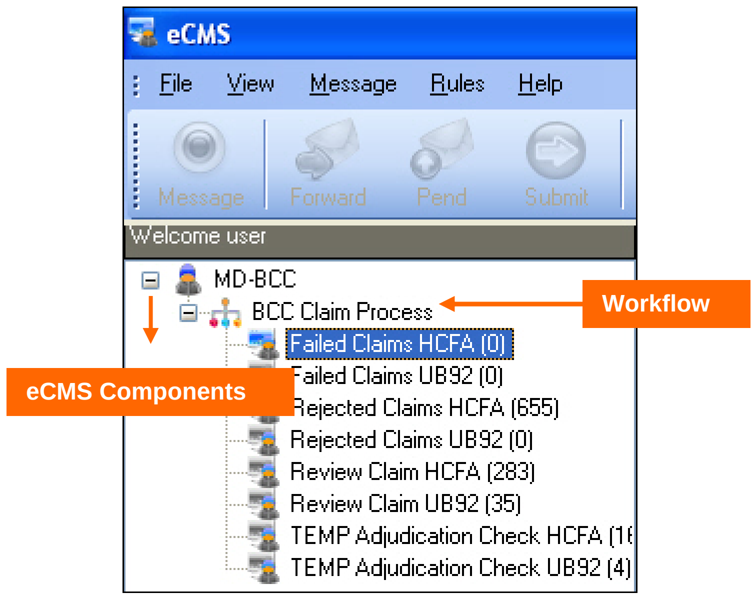


Figure 1—Processing Messages

UNDERSTANDING THE INBOX

The Inbox shows all available messages the user has access to view and use. The Inbox can be refreshed by clicking Refresh on the toolbar, and they are automatically refreshed every time you complete an action on a message.

Messages are organized by trading partners, workflows and human interactions. The Human Interaction components contain the actual messages requiring action. Each eCMS node has a unique purpose; one component may be responsible for message review, other for message adjudication, etc.…



UNDERSTANDING AND CUSTOMIZING THE MESSAGE LIST

You can customize the view of messages by sorting, filtering and aligning the messages.

Sorting

Sorting the message to change the order they display in the Messages List.

1. Select the column header you wish to sort by and then select the data type from the header drop down list.

2. Click the header at the top of the Messages List and all the messages will be listed alphabetically.

Filtering

Filtering the messages is related to filtering the displayed messages in the Messages List according to a word or letter(s) that you enter in the header of the field.

1. Enter a specific word or some characters in the header field, for example a specific username and only the messages with that username that will be displayed in the message List.

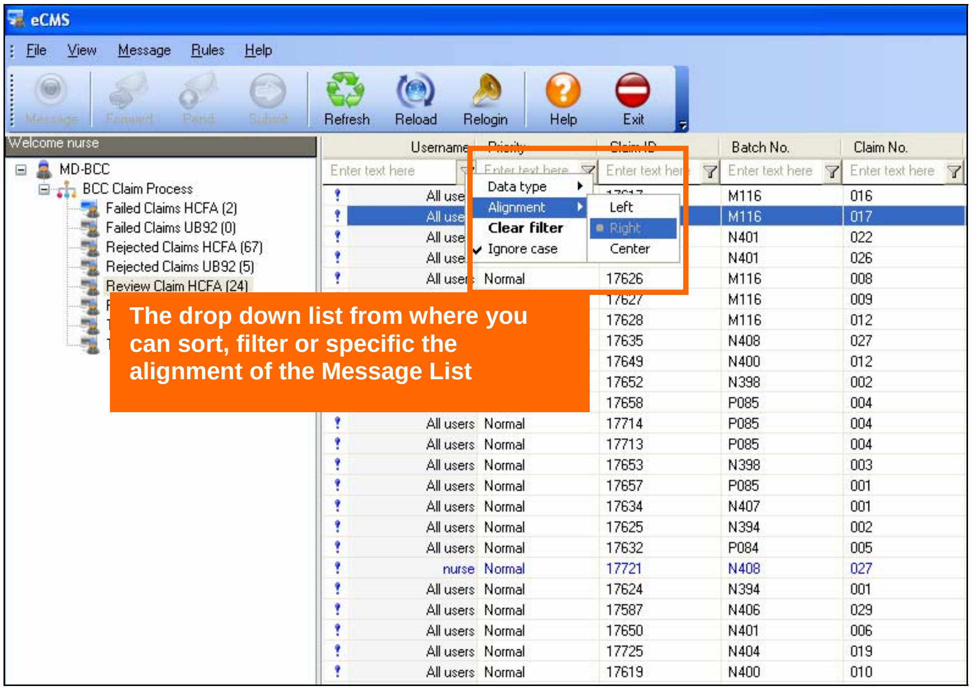
2. Select Clear Filter item from the header drop down list that you entered characters in and all the messages will be displayed in the Messages List.

Alignment

You can customize the text in each column to align to the center, right, or left.

1. Select the Alignment item from the header drop down list.

2. Select either center, right or left and the messages will be listed according to your selection.



MESSAGE COLOR INDICATION

After login to the application, you may find that the messages have several colors. These colors indicate the followings:

- Red Color: Happens if the message crashed before or incorrectly closed.
- Blue Color: Happens if the message is pending to you.

VIEWING A MESSAGE

SELECTING A MESSAGE

1. In the Inbox message tree, select an eCMS node and all the related messages will be displayed in the Message List.

2. Select a message from the Message List then click View Message button in the toolbar. Or double click the message itself and the message will be displayed in the Message Panel. Also, you can right click the message and then select View.

REVIEWING OR MODIFYING A MESSAGE

EDITING OR MODIFYING IN THE MESSAGE FIELDS

You can not modify the data in the message without adding an error. You have to add an error to the message so that the following eCMS user sees it and be able to modify it. A field with an added error will be highlighted in orange color where you can edit in it.

For more details about adding the error, refer to Add a Specific Error.

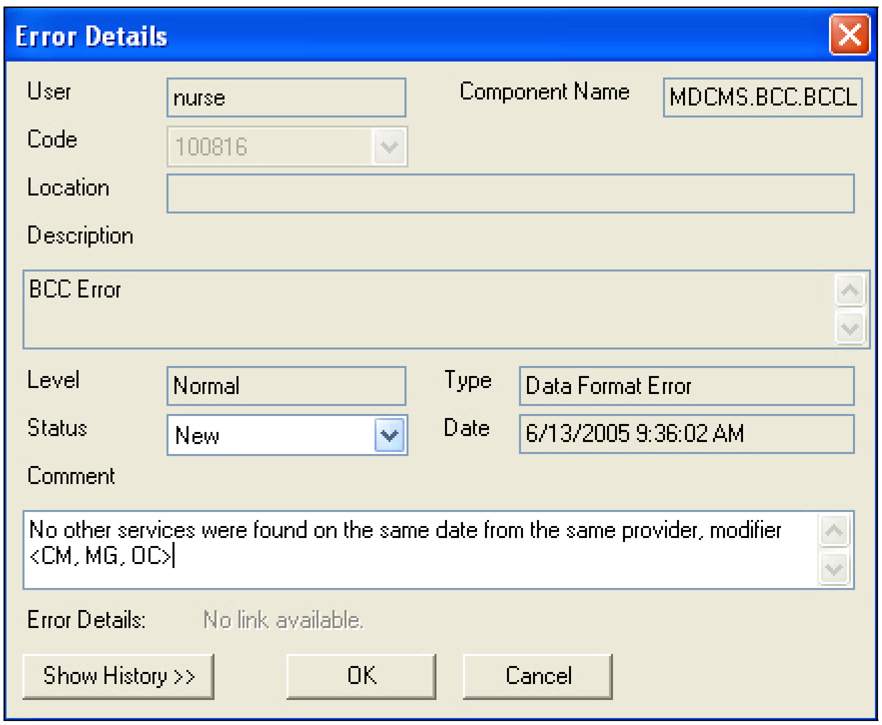
VIEWING AND ADDING ERRORS

Common error types can be identified using the Errors Panel.

VIEW AN ERROR

1. Select “Errors” from the View menu to open the Message Errors Panel, or click the Errors tab in the Message Extensions Panel.

2. Double click the error where the "Error Details" window will be displayed to view the error details and comments from the user who entered the error.



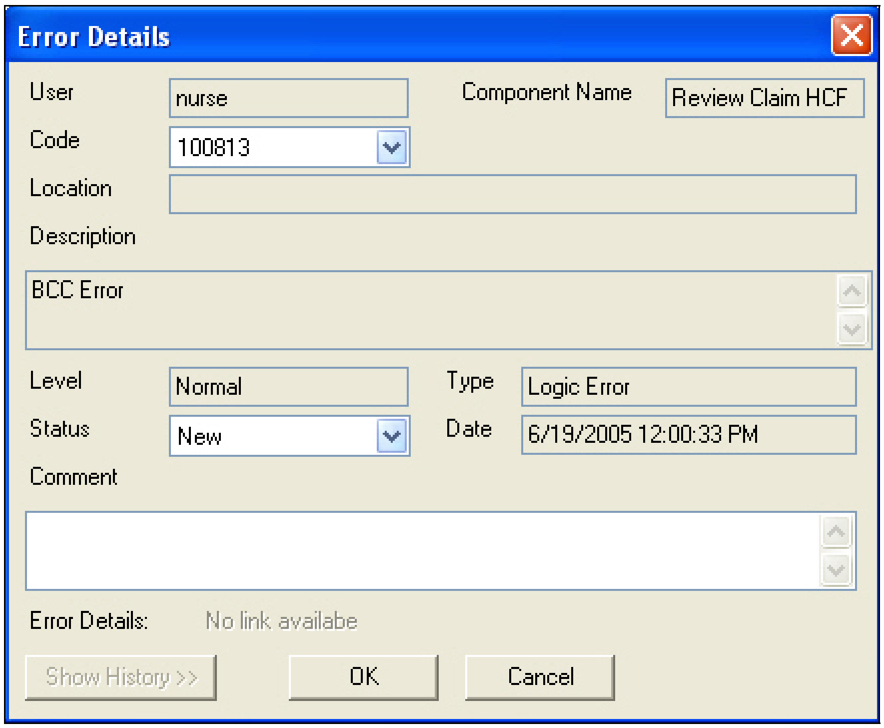
3. Click the Show History button to view some details of the error like the Username, Status, Comment and Date Modified from the user who entered the error.

Add a General Error

Add an error to the message to explain the type of error found during review.

1. Select “Errors” from the View menu to open the Message Errors Panel.

2. Click the Add button to open the Error Details window.



3. From the Code drop down list select an error code (the error codes are predefined by your system administrator). The details of the selected error will be displayed in their related fields.

4. Select the error Status from the Status drop down list (the error status is predefined by your system administrator).

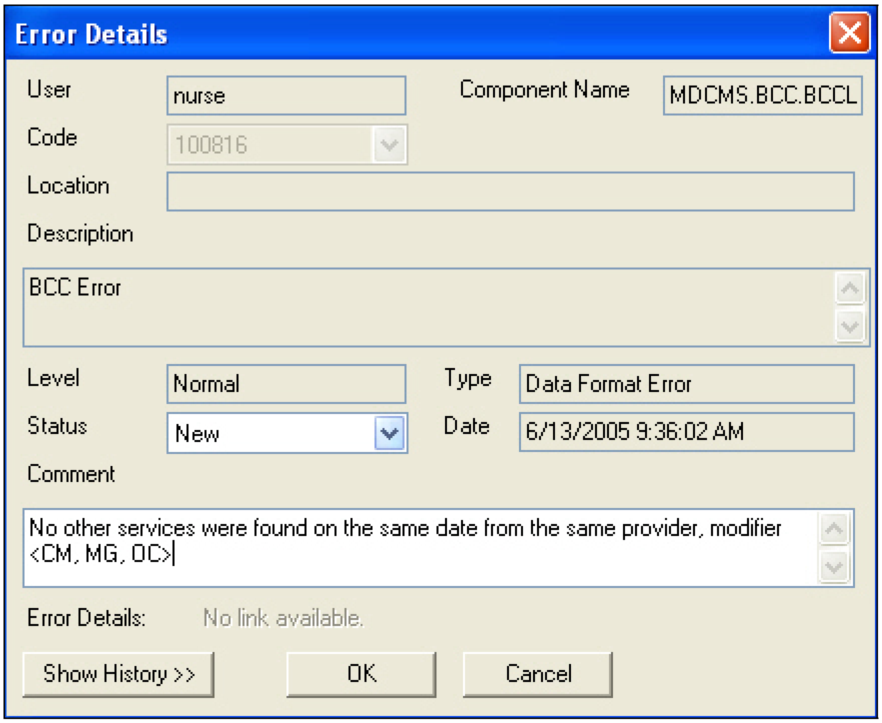
5. Add a comment, if desired, in the Comment text box.

6. Click OK.

ADD AN ERROR FOR A SPECIFIC FIELD

1. Select the field you want to modify.

2. Right click it and select Add Error and the Error Details window will be displayed.



3. Select the Error Code from the drop down list. Refer to your system administrator for questions about the error codes.

4. Select the Error Status from the related drop down list. Refer to your system administrator for questions about the error status.

5. Enter any notes or comments in the Comment text field. (Optional)

6. Click OK, and then you can edit in the selected field, it will be highlighted in orange.

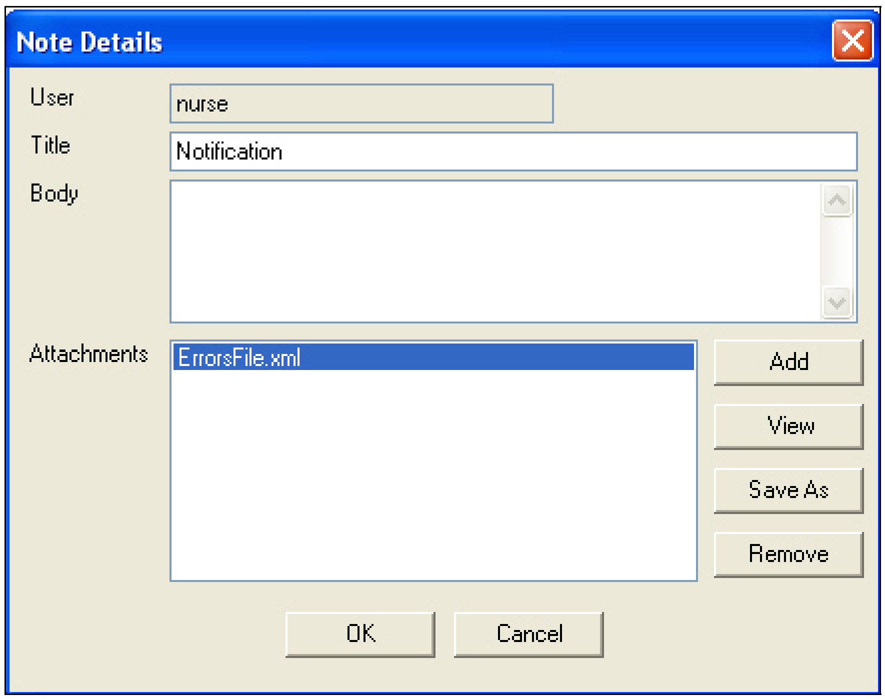
NOTE: When you add an error on a certain field, this field will be highlighted in an orange color to show the next user that there is an error in this field.

VIEWING AND ADDING NOTES

VIEWING NOTES

1. Select Notes from View menu.

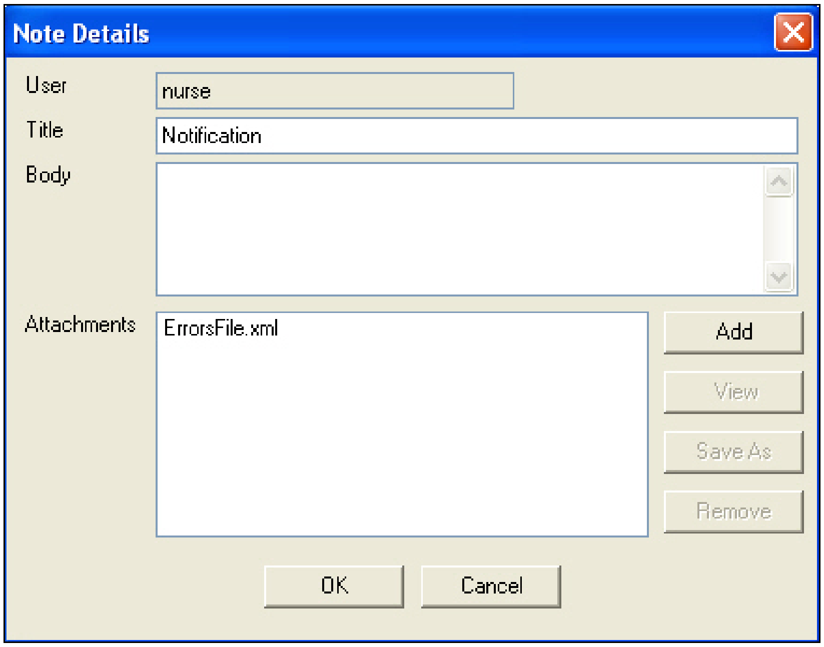
2. Double Click the Note that you want to open and the Note Details window is displayed, showing the title of the note, the user who added the note, the note text, and any attachments.



3. To view an attachment, select the attachment and click View button.

ADDING A NOTE

1. Select Notes in the View menu and the Note Details window will be displayed.



2. Click the Add button to open the Note Details window, to add a comment or a note to the currently open message.

3. Enter the title of the new note in the Title field.

4. Enter a note in the Body text box.

5. To add an attachment to the note, click the Add button in the Attachments section. To remove an attachment, select it and click Remove.

NOTE: The Save As button is disabled when you add an attachment, but it is enabled if another user adds the attachment

DELETE A NOTE

1. Select the note to be deleted.

2. Click the Delete button.

VIEWING A MESSAGE AUDIT

The audit details the path of the message. View the audit to see a history of the path of the message in the workflow.

1. Select Audit in the View menu to view the details of tracking the active message.
2. You can view the component name that used that form in the workflow, along with the name of the user, and the date of the action performed on the form.
3. In the Audit tab, you can see the comment that the user added upon the action performed (Pend, Forward, and Submit).

NOTE: The username field of the Audit displays the name of the user who processed the message. The name System is displayed for all automated activities.

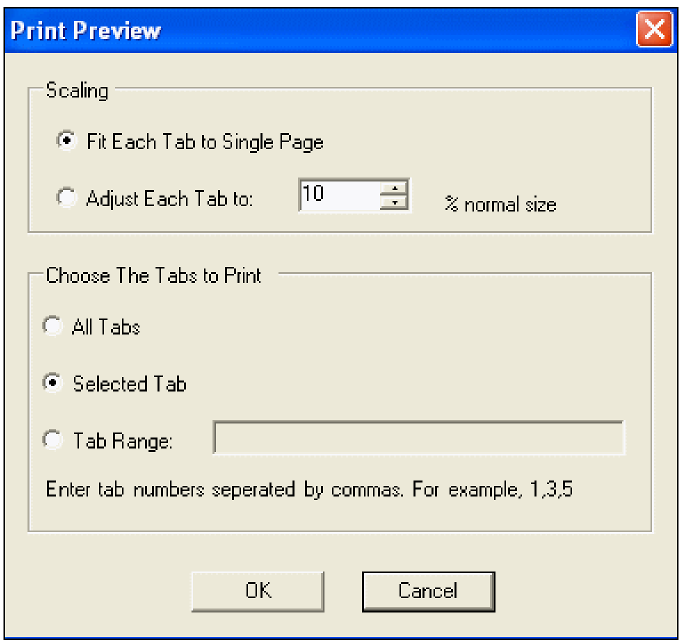
PRINTING FORMS

You can print a copy of any of the forms.

PRINT PREVIEW

Select Print Preview in the File menu and the Print Preview Window will be displayed. It is divided into two sections:

- Scaling
- Choose the Tabs to Print



1. Select the desired Scaling, or Size. Choose “Fit each tab to single page” if you want the form to fit on one page. Choose”Adjust each tab to” and select a percentage to increase or reduce the size.
2. Choose the Tabs to Print by selecting the related radio buttons. You can print the form of the currently selected tab, choose to print the forms from all tabs, or select a range of tabs to print.
3. Click OK and the Print Preview page will display to show you how the form will look when printed.

PRINT

1. Select Print item in the File menu and the Print window will be displayed.
2. Click OK to perform the action or Cancel to cancel the action.

Chapter 3 Actions on Messages

In this Chapter

PERFORMING ACTIONS ON A MESSAGE

After reviewing and modifying messages, select an action to execute. These actions include:

- Forwarding an open message
- Pending an open message
- Submitting an open message
- Setting an open message priority
- Closing an open message.
- Forwarding/Pending/Submitting Multiple Messages.

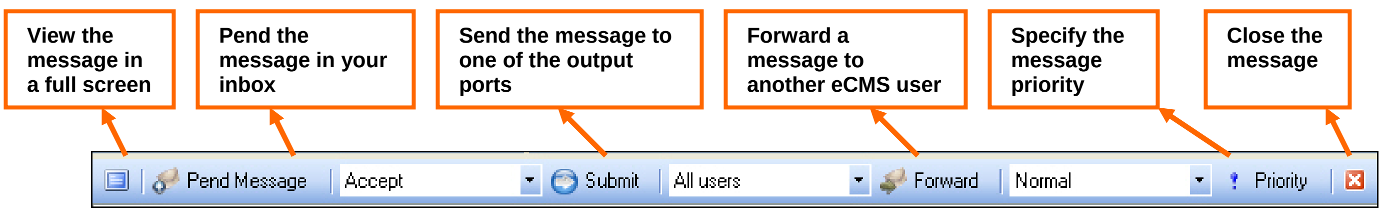


Figure 2— An open Message Toolbar

FORWARDING AN OPEN MESSAGE

You can forward a message to another eCMS user or to All Users.

1. Select a User from the Forward drop down list. You may select a specific user, or send it to the larger group by selecting 'All Users'.
2. Click Forward and a confirmation message will be displayed.

3. Click Yes if you are sure you want to send this message to the selected user.

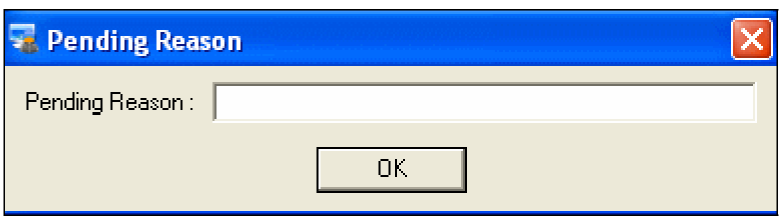
PENDING AN OPEN MESSAGE

Pending a message means saving the message in your inbox to review it later.

1. Open the message and it will be displayed in the Message Panel.

2. Click the  Pend button to keep the message in your account and a confirmation window will be displayed.

3. Click Yes if you are sure that you want to send this message to the logged user and the "Pending Reason" window will be displayed.



1. Enter the Pending reason and then click OK. The pending reason will be displayed as a tool tip to the selected message in the message list panel.

NOTE 1: When you pend a message, it will display in blue in the Message List.

NOTE 2: You can disable the pending reason option from the View Menu, then Select Options and Uncheck the Pend checkbox

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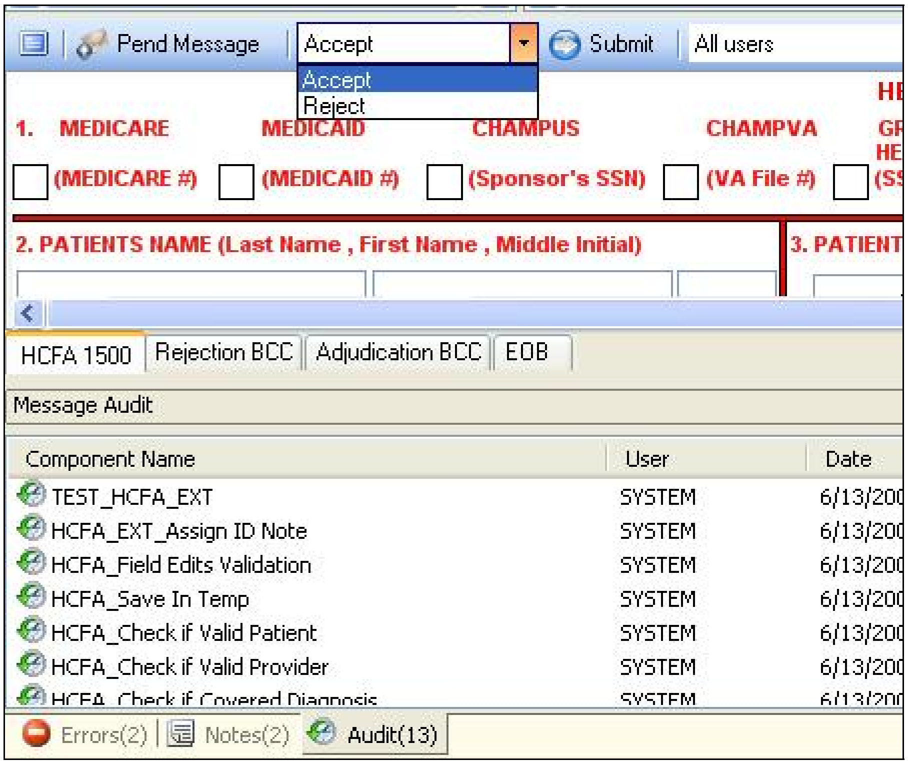
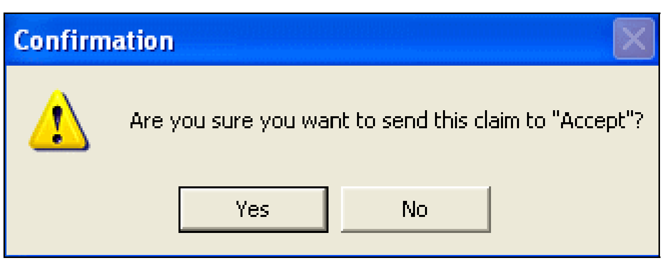
SUBMITTING AN OPEN MESSAGE

When you submit a message you send it to one of the output ports of the selected eCMS node.

1. Select the Output port you want your message to go to from the related drop down list, for example Accept or Reject.



2. Click Submit and a Confirmation window will be displayed,



3. Click “Yes” if you are sure you want to send this message to the specified output port. Click No if you want to return back to the message form.

DETERMINING AN OPEN MESSAGE PRIORITY

You can determine the message priority that appears in the Messages Panel.

1. Open a message

2. Select the message priority from the Priority drop down list in the message toolbar, and choose high, low or normal.

3. The Message priority will be shown in the message list. The color of the exclamation mark beside each message changes according to its priority: Messages with priority high have red exclamation mark whereas the low priority messages have grey color, while the normal priority messages remain in blue. When the priority of messages is set the high priority messages are sorted to be on the top of the message list, the normal in the middle and the low priority are at the bottom part of the message list.

CLOSING A MESSAGE

When you are done with all actions on a message, you can close it by clicking the Close button. You cannot view another new message unless you close the current message.

NOTE: The Close button in the message toolbar will be disabled before selecting any action on the message such as sending, submitting or pending it.

FORWARD/PEND/SUBMIT MULTIPLE MESSAGES

Users can select multiple messages and Forward or Pend or Submit them simultaneously without having to open them.

Forward/Pend/Submit Messages

1. Select the messages you want to perform an action on from the Message List Panel. In order to select multiple messages at the same time, click Ctrl tab and then select the messages you want.

2. Click Forward icon from the toolbar to forward the selected messages or click Pend icon from the toolbar to pend the selected messages or click “Submit” icon to submit the selected messages.

MANAGING LARGE NUMBERS OF MESSAGES WITH RULES

When you have large volumes of incoming messages, *eCMS* application can help you process them more efficiently. You can use the "Rules" feature provided by the *eCMS* application to automatically forward or pend incoming messages, with a certain condition that you specify to certain users.

THE PURPOSE OF THE MESSAGE RULES

The purpose of the rule is to be able to assign groups of messages to certain users at once, based on predefined criteria, without having to open them one by one. Using rules, you can assign or pend certain messages to certain users. For example you can create a rule, that assigns all existing and incoming messages whose SSN='12345' to a certain user "User1".

NOTE: The defined rules are not case sensitive, e.g., If the SSN value of the currently selected message is "123A" (this is the one that the rule will match against), and a message is received with the SSN value "123a", this message will match the rule, and should go to the selected user as the rule specifies.

MESSAGE RULES AND USER PRIVILEGES

If we have four users: Admin (defined in the XIP Administrator as an administrator user), User1, User 2, User 3 (normal users).

- The Administrator is the only user who can assign messages from a normal user to another. For example, if the user "Admin" creates a rule that, when applies, assigns a message that belongs to "User 1" to "User 2". This rule will be successfully applied because the rule creator (Admin) has the right to take messages from a normal user and assign them to anyone else.
- Another examples is that, if the user "User1" creates a rule that, when applies, assigns a message that belongs to "User 2" to "User 3". This rule will fail to apply because the rule creator (User 1) doesn't have the privilege of assigning messages from users to other users.
- A user can only disable/release a rule that he created by himself. If a user belongs to an administrator group, then he is authorized to disable any rule, even if he was not the rule creator. Refer to View Message Rules.

CREATE/ADD A MESSAGE RULE

This action applies on the message header(s).

1. Select a message and click “Pend” or “Forward”, a Pend/Forward dialog will be displayed. A combo box is enabled if you check the checkbox of “Apply this rule…” The combo lists all the message headers of the currently selected eCMS node.

2. Check the checkbox to create a rule. For example, if you select one of the headers such as SSN, and select a user to forward the message to, say “User 1”, this means that “ For all existing and incoming messages, if the message’s SSN matches the SSN values in the message header that you are currently selecting, send this message directly to “User 1”.

3. Click OK and the rule specified in the previous step will be applied on both existing and incoming messages.

NOTE 1: There could be many cases when we can have conflicting rules. The application will identify only one type of rule conflicts. Rule A and B are said to be conflicting if both rules are identical, except that each ones tries to assign the message to a different user. Here is an example of two conflicting rules (rules A and B): Rule A= assign messages where header1=”hi” to “User1”, and Rule B= assign messages where header1=”hi” to “User2”. When a user tries to create a rule that conflicts with another, he will be notified and the rule will not be added.

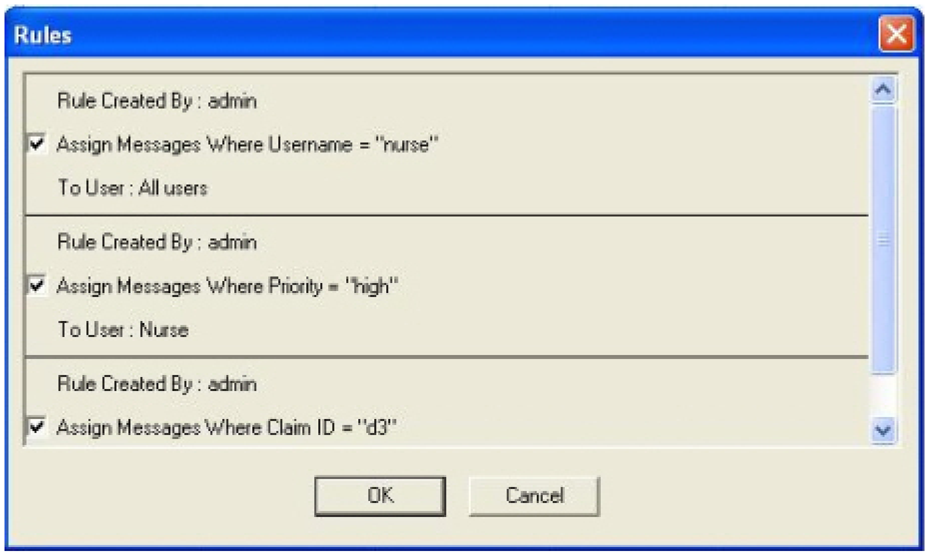
NOTE 2: If you select multiple messages, the rule will pick the value of the first header and use it for matching. For example, if you choose to forward two messages, the first one with SSN “123A” and the second with SSN= “456B” and try to make a rule to forward to “User1”, then the created rule will be: Assign messages where SSN=”123A” to “User1” and the second SSN value will be ignored.

VIEW MESSAGE RULES

You can view all the rules that currently exist in a certain eCMS.

1. Select View from the Rules menu and the Rules window will be displayed to show all the rules for the logged on eCMS user. This will list all the rules each having its own check box. The checkbox is enabled if the currently logged user can choose to disable or release this rule.

2. Uncheck the rule that you do not want to be applied or just leave it, as it is if you want to keep the rule.



NOTE 1: A user can only disable/release a rule that he created by himself. If a user belongs to an administrator group, then he is authorized to disable any rule, even if he is not the rule creator.

NOTE 2: When you release a rule, the current messages on which the disabled rule was applied, will be released from their owners, and kept for their original owners (the ones who owned them before the rule was applied).