WML DataGateway ViewPoint User Guide

Innovative Technology

WML DataGateway ViewPoint User Guide

Version 88d4c05 (ticket2044_viewpoint_documentation), 02 June 2016

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About this manual

This manual describes the use of the WML DataGateway ViewPoint network document access system.

1. Intended Audience

This manual is aimed at brokers who will be using the WML DataGateway ViewPoint system to access and manipulate their customers' documents that have been processed by DataGateway.

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Chapter 1. Introduction

WML DataGateway ViewPoint comprises two components:

DataGateway	This is the system that processes documents including checking their integrity, converting them to other print formats and sending them to be printed or emailed.
ViewPoint	This is the system that enables brokers to access their customers' documents that have been processed by DataGateway. They may also be able to perform certain actions on the documents and produce reports.

1.1. DataGateway

The path that a document takes through the system is controlled by a number of 'queues'. Each document is pulled out of the queue and some processing is done, this may be to identify the document and/or check its integrity etc. The next queue to which the document will be written is determined by this processing. Documents are dispatched by a variety of methods to an input queue (there may well be more than one input queue). The final queue in the chain will be responsible for sending the document to a printer or for emailing. If any integrity checks fail or the document cannot be processed for some reason then that document will be 'held' for human intervention.

1.2. ViewPoint

As a user of the ViewPoint system, you will be given an account with a unique user name and an associated password. The user account will be created by the system administrator. Your user account will be associated with a single broker reference which gives you access to the documents that you require. Other users may be associated with the same broker reference, and as such will be able to access the same documents as you.

The ViewPoint system gives you access to information about your customers' documents. The information available concerns held documents and electronically delivered documents. You may also perform some actions on the documents, such as printing a paper copy for mailing to the customer.

The type of information that you have access to and the actions that you can perform are controlled by the system adminstrator.

The actions that may be available to you are:

Held Documents

- View a list
- View
- Force release
- Delete

- Print without releasing

Documents specified for electronic delivery

- View a list
- View
- View the audit trail
- Print for mailing
- Send a 'documents ready' notification to a customer
- Change the email address and/or SMS number
- Cancel

Reports

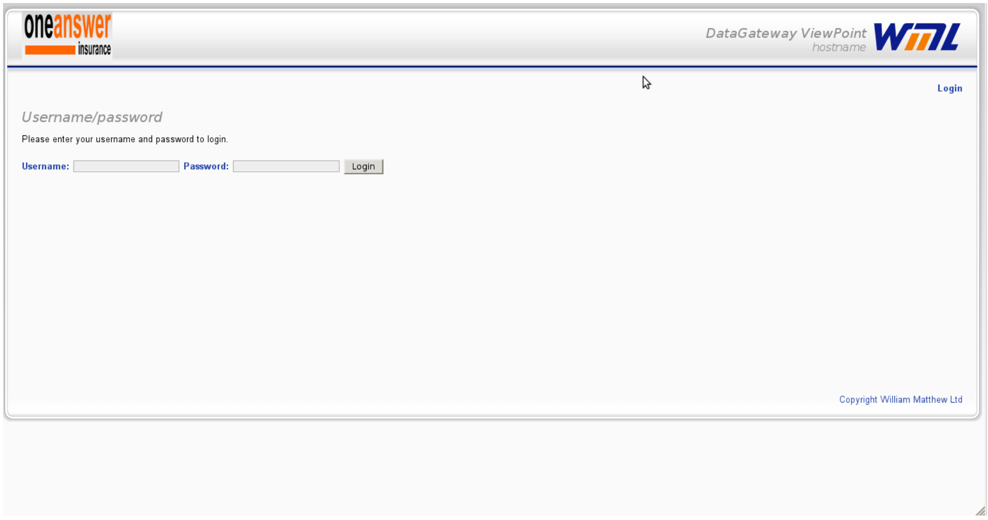
- Produce a report of electronic document delivery over a selectable period

Chapter 2. Logging in to ViewPoint

2.1. The login page

Upon accessing the ViewPoint web site the first page to be displayed will be the login page see Figure 2.1.

Figure 2.1. ViewPoint brokers login web page



Since no user has logged in yet, the logo in the top left hand corner will be the default logo for this system. In the top right hand corner will be the WML logo and to the left of this will be the name of the product *DataGateway ViewPoint* followed by the hostname of the web site you are accessing.

In the main body of the web page will be two edit boxes - one for the user name and the other for the associated password. Enter your user name and password and press the **enter** key.

If the two boxes are cleared and the system has not logged in then the user name/password combination is invalid. Check the values and try to log in again.

2.2. Next page after logging in.

The web page that is next to be displayed is dependent on the permissions that have been set up for you.

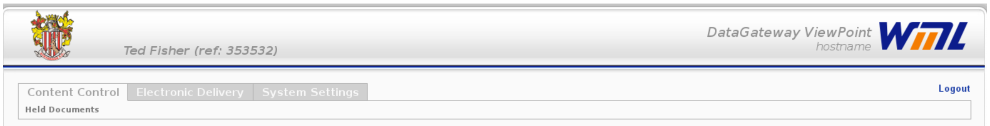
The next screen will be one of:

- *Content Control|Held Documents*
- *Electronic Delivery|Search*
- *Electronic Delivery|Reports*

- *System Settings|Password*

The header of the web page will now display the logo associated with your broker reference if there is one otherwise it will display the default logo as before. It will also display your name and your broker reference as shown in Figure 2.2.

Figure 2.2. ViewPoint web page header



The tabs at the top of the web page depend on the permissions that have been set for you. If you have permission to access files that have been held by content control (DCC), in other words that have failed at least one integrity check, then the *Content Control* tab will be displayed. If you have permission to access EDD information then the *Electronic Delivery* tab will be displayed. The *System Settings* tab will always be displayed. Figure 2.2 shows, as an example, all the tabs.

Chapter 3. Content Control

3.1. Overview

One of the functions of DataGateway is to check the integrity of the documents it is processing. If a document is found which has an error then it is *held* which enables human intervention in its processing. This functionality is the responsibilty of the Document Content Control subsystem (DCC).

Here are some of the reasons why a document might be held:

- Important information is missing; for example the document is to be sent by email but there is no email address
- A value is too small or too large; this prevents the company sending out a bill for £0.00 or £1000000000
- A date is too far in the future or past
- An address field does not contain enough detail
- Some parts of the document are missing; for example the document should include a Certificate of Insurance but it doesn't
- The DCC has not been able to identify the document; usually because some part of the letter page is missing

This is by no means a comprehensive list but gives you a feel for what might have gone wrong.

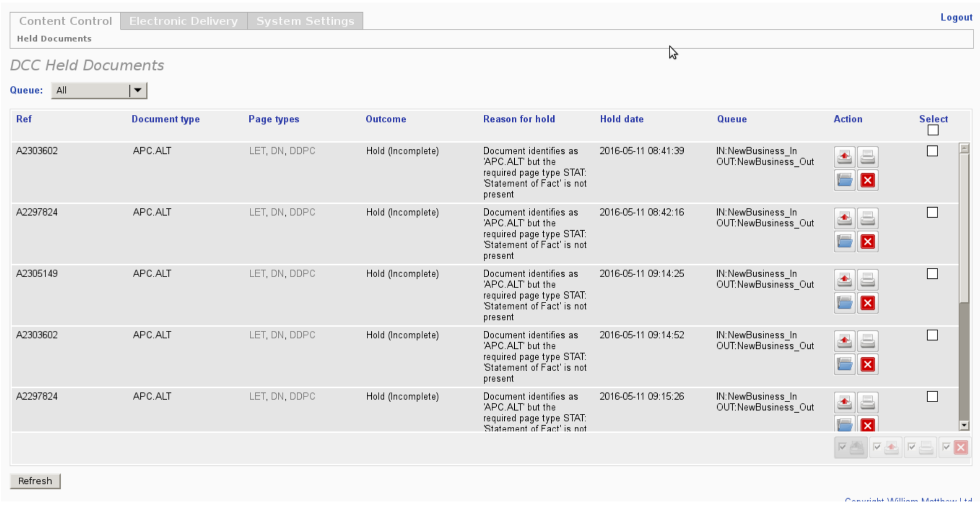
One significant issue would arise if the document did not contain a broker reference. This would result in the document being held but the broker it relates to would not be able to see it, although system administrators would as they have access to all documents.

The way that DCC recognises documents and knows which rules to apply is configured by the system administrators using often quite complicated algorithms. When documents are held it is possible to get a list of them showing the reason why they have been held. It is then possible to decide on how to deal with them. There are several options including cancelling them and resubmitting a corrected version or releasing them to be processed anyway (force release). System administrators have more options.

3.2. Held Documents

Assuming you have permission to access held documents, when the Content Control tab is selected all held documents associated with your customers will be displayed, as shown in Figure 3.1.

Figure 3.1. ViewPoint held documents list



The list can be filtered on a per-queue basis, by selecting a queue from the **Queue** dropdown menu, or reloaded using the **Refresh** button.

Each entry in the list gives the document reference, the composition of the document as determined by the system, the reason that it was held, the queue on which it was processed, and the hold date.

The following actions are available for a held document provided you have permission:

View the document. The document will be opened for viewing in a new window.

Print the document. You will be prompted to select a queue on which to print the document.

Delete the document. The document will be removed from the held documents record.

Release the document. The document will be printed, and then removed from the held documents record. You will be prompted to select a queue on which to print the document.

Other actions are available to system administrators.

Selecting multiple documents

It is possible to perform certain functions on more than one document at a time by checking the box on the right of each entry that you wish to perform the action on or by checking the box at the top which will select all entries. The following actions are available for multiple held documents provided you have permission:

	Release the selected documents. The documents will be printed, and then removed from the held documents record. You will be prompted to select a queue on which to print the documents.
	Print the documents. You will be prompted to select a queue on which to print the documents.
	Delete the documents. The documents will be removed from the held documents record.

Note that these buttons are not enabled until at least one entry has been selected.

Chapter 4. Electronic Document Delivery

4.1. Overview

This chapter deals with the Electronic Document Delivery (EDD) system where documents are sent to customer electronically rather than print and mail.

When a document is specified as being for EDD it is stored in an archive. A notification email is created and sent to the customer providing details of how to pick up and download the document. This involves filling in a form with details to confirm identity and typing in an access code provided in the notification email. When the customer does this the document will be downloaded. A number of reminder notifications can be sent at intervals if the customer has not downloaded the document. If, after a number of days the customer has not downloaded the document and *fallback to print* has been enabled the document is printed and mailed to the customer. The number of reminders to be sent and how often, the maximum number of days to wait before defaulting to print and mail and the enabling of *fallback to print*> are all under the control of the system administrator.

4.2. Searching for EDD documents

Subject to permissions users are able to search for documents that match a specified pattern and obtain information about them or perform actions on them. Also, subject to permissions, users may produce reports on EDD covering specific intervals. Only documents associated with your own broker reference can be accessed.

To perform a search of EDD documents select the **Search** web page under the *Electronic Delivery* tab. Figure 4.1 will be shown.

Figure 4.1. ViewPoint electronic document delivery web page

To start a search enter a search pattern in the *Search terms* edit box. The section *Terms for searching EDD documents* below shows how to do this.

Terms for searching EDD documents

- Search first name, last name, customer reference, mobile/email and access code using space or comma separated terms.

- You can group terms containing spaces or commas using double or single quotes like this: "1 23,45" or '1 23,45'.
- All searches are case insensitive: Bill Smith and bill smith will return the same results.
- You can use the terms AND and OR (upper or lower case) to determine how to return results.
- AND is the default. The search Bill Smith is equivalent to Bill and Smith and would not return the customer John Smith. (But bill or smith would.)
- To search documents by creation date, use the following form: 2016-02-14 to search the date or 15:48 to search the time.

Figure 4.2 shows an example of the results of a search. Only documents associated with your broker reference will be displayed.

Figure 4.2. ViewPoint example of EDD search results table

4.3. The EDD Search Results Table

The table contains the following information:

- Customer name
- Document creation date
- Customer reference
- Mobile number and email address; only displayed if they are available. the mobile phone number is the number to be used in SMS if this is enabled.
- Customer's access code; this is the code that the customer must type in to download the documents.
- Status code; see the section called “Status” below.

There are also some actions that can be performed (subject to permissions):

- Send a notification to the customer
- Change the mobile phone and/or email address
- View an audit trail for the document
- View the document
- Send the document to be printed and mailed
- Cancel the document

Status

The status of a document indicates where in the sequence of actions it lies. It may be one of the following:

Not yet delivered
The document has not yet been downloaded successfully by the customer and has not been printed and mailed.

Downloaded at yyyy-mm-dd hh:mm:ss
The document has been downloaded by the customer at the displayed date and time.

Printed for mail at yyyy-mm-dd hh:mm:ss
The document has been printed and mailed to the customer at the displayed date and time. This may have been performed manually or automatically if the customer has not downloaded the document within a configurable time limit and *fallback to print* is enabled.

Cancelled at yyyy-mm-dd hh:mm:ss
The document has been cancelled on the displayed date which means that the customer will no longer be able to download or otherwise access it.

Expired
The document has not been downloaded by the customer within the time limit and there is no provision for *fallback to print*. The document is still accessible but no more automatic reminder notifications will be sent to the customer.

EDD Actions

Subject to permissions, certain actions may be performed on each item in the table. These are:


Enables you to view the audit trail of the document which shows all the events concerning the document. An example of this is shown in Figure 4.3.


Sends a notification to the customer by SMS, email or both. Note that if the document has been cancelled, notifications cannot be resent.

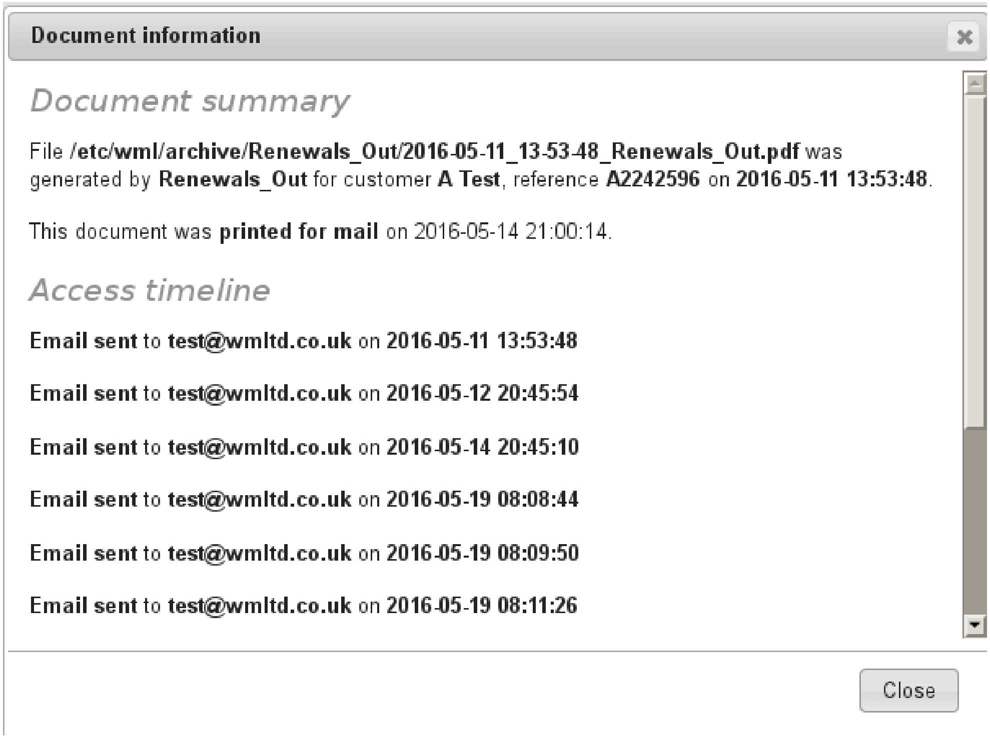

Enables you to change the mobile phone number or the email address or both.


Enables you to view the document. This will pop up in another window. Ensure that your browser has pop-ups enabled.


Sends the document to a printer so that it can be mailed to the customer instead of sending it by SMS or email.

Enables you to cancel the document. Afterwards the customer will not be able to download or otherwise access it. Note that the document is *not* deleted.

Figure 4.3. ViewPoint Audit trail example

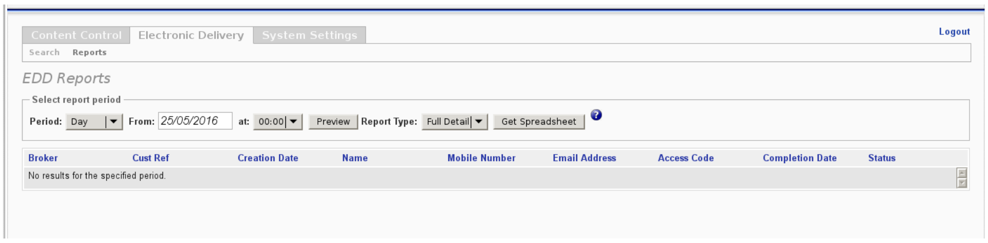


4.4. EDD Reports

A report may be generated to show information concerning EDD documents that were processed over a specified period. Only documents related to your own broker reference may be accessed. This information can also be converted to a spreadsheet and either viewed or downloaded to your own PC. Only one report type, the full details, is currently available but it is possible that others may be added in the future.

To generate a report navigate to the *Electronic Delivery* and then to the *Reports* web page. This is shown in Figure 4.4

Figure 4.4. ViewPoint EDD reports web page



The period that the report is to cover is selected from the drop down box labelled by **Period**. The options are:

- Day
- Week
- Month
- Custom

If **Custom** is selected then you will be able to set both the start and the end date and time. Two more boxes will appear, one is an edit box so you can type in the end date and the other is a drop down box so you can select the end time. If you select Day, Week or Month then only the start date and time can be specified.

To specify the start date then type the date into the edit box labelled **From**. Follow the layout of the default date (today) currently in the box i.e. *dd/mm/yyyy*. The start time to the nearest hour can be selected from the drop down box labelled **at**. If the **Custom** option has been selected then this should be repeated with the boxes labelled **To** to select the end date and time.

Once the start (and to) date and time has been set then click on the **Preview** button.

> **Note**
>
> Generating a report may take several minutes.

Eventually the details of all the documents processed in the specified time interval will be displayed as a table. The information displayed is:

- Broker - not relevant here since you can only view your own customers' documents.
- Cust Ref - the customer reference
- Name - the customer's name
- Creation date - the date the document was processed
- Mobile Number - the mobile number to which SMS messages are to be sent
- Email Address - the customer's email address
- Access Code - the code the customer needs to type in to access the documents
- Completion Date - the date and time the documents were sent to the customer

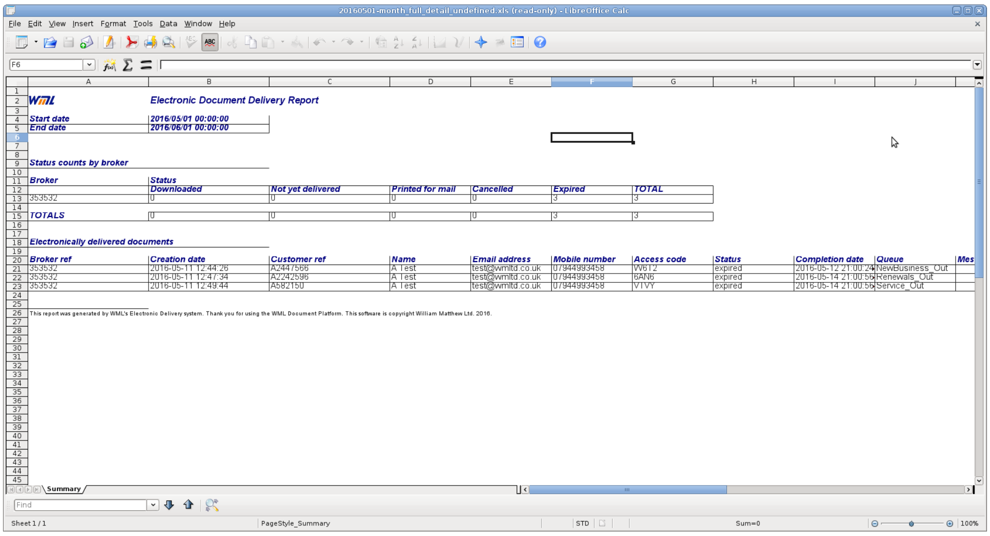
- Status - the status of the document, see the section called “Status” in Section 4.3

See Figure 4.5 for an example of the EDD report table.

Figure 4.5. ViewPoint EDD report table

Clicking on the **Get Spreadsheet** button will generate a csv file containg the full details of each document together with an analysis of the number of documents by status. An example of this report is shown in Figure 4.6

Figure 4.6. ViewPoint EDD report in CSV format



Chapter 5. System Settings

5.1. Changing your Password

A broker user may change their own password and are recommended to do so at regular intervals to prevent unauthorised access.

To change your password navigate to the **System Settings** tab and the **Password** web page will be the only one available. Type your new password into the two edit boxes and click on **Update Password**. Your password will then be changed. There are no restrictions on passwords other than they must be at least 7 characters long.

Appendix A. Frequently Asked Questions

A.1. General questions

Q: Some buttons are greyed out and if I click on them nothing happens.

A: The most likely explanation for this is that you do not have the necessary permissions to perform the action. If you think you should have access to the action then contact your system administrator.

Q: My web pages don't look like the ones in the User Guide - some of the icons are missing.

A: The most likely explanation for this is that you do not have the necessary permissions to perform the action. If you think you should have access to the action then contact your system administrator.

Q: Can I access documents or other information from customers of other brokers?

A: No. You can only access information related to your own broker references.

Q: Can other brokers access data from my customers?

A: Only users associated with your broker reference and system administrators can access your customers' data. It is therefore important to keep your user names and passwords confidential and secure.

A.2. Logging in

Q: When I type in my user name and password nothing happens. The edit boxes go blank and I am not logged in.

A: Either the user name is invalid or the password does not match the one expected for the user. If you have forgotten your user name and/or password contact your system administrator.

A.3. Electronic Document Delivery

Q: When I look for a document in the EDD Search it isn't there. I know it was processed but it is not listed regardless of what I type into the search box. Neither is it there in the DCC held documents list.

A: Is it possible that the document did not have a broker reference contained within it? Contact your system administrator who will be able to access the document and let you know what has happened.