

Batch in Suspended Status

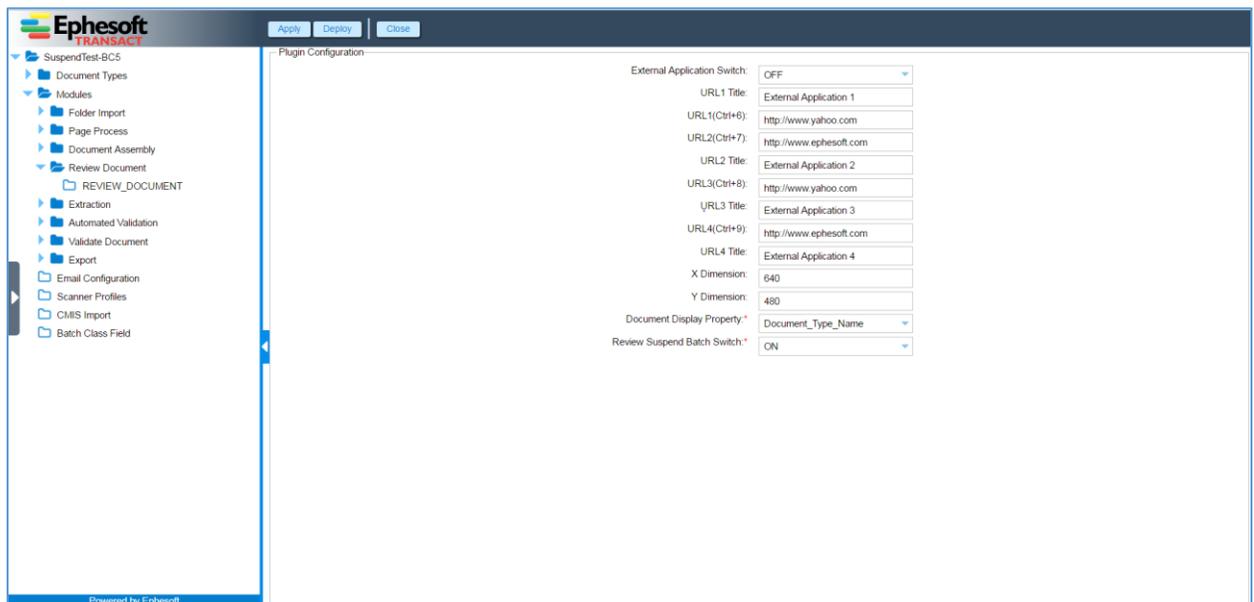
Overview

Earlier, if a batch needed external inputs for review/validation and the operator was unable to review/validate the batch for any reason, there was no provision to mark the batch so that the batch could be picked by another operator or the administrator for successful review/validation.

A new feature has been introduced in Ephesoft v4.1.1.0 that allows user to suspend a batch in review/validation and assign it to another operator. User who suspended the batch can also resume the batch in future if required.

Configuration

- Suspend feature can be enabled/disabled on Review, Validation screen by a switch “Review Suspend Batch Switch” or “Validate Suspend Batch Switch” in REVIEW_DOCUMENT and VALIDATE_DOCUMENT plugins respectively. Please see below screenshot:



- To send mail notification while suspending a batch, following property must be set to false in “<Application Folder>/WEB-INF/classes/META-INF/dcma-mail/mail.properties” properties file:

mail.suppress = true

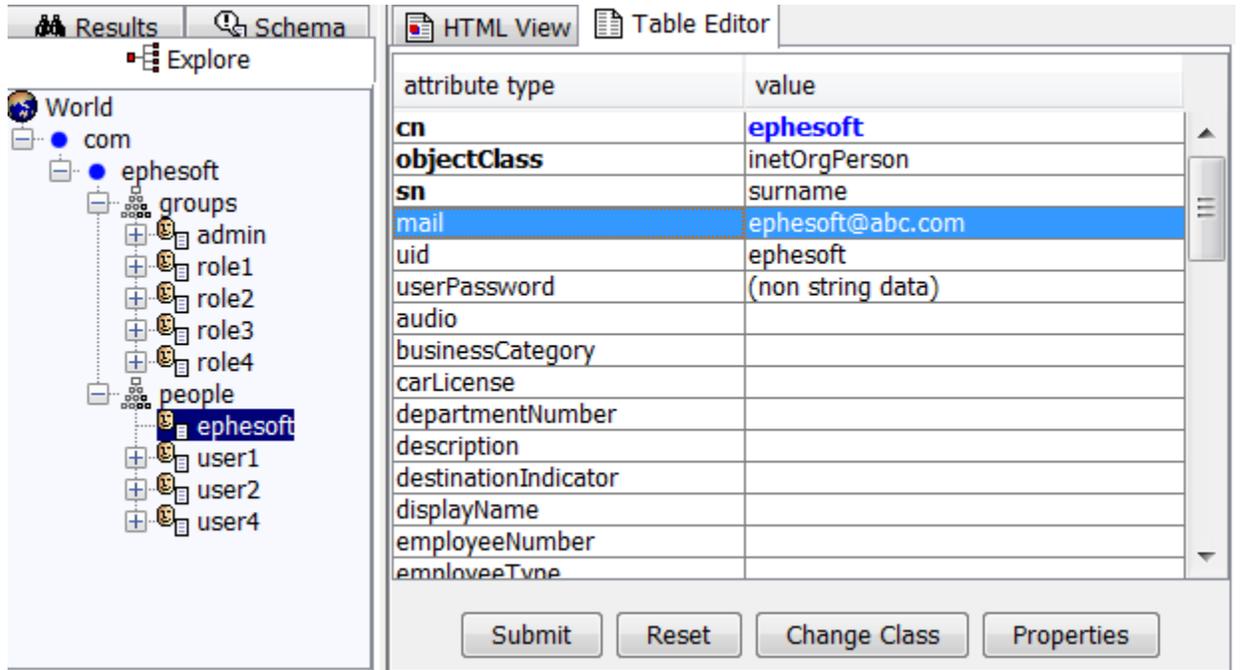
By default, message suppress switch is true, so email notification feature will not work without enabling it from that property.

- User can configure the attribute name to read email for a user from the LDAP/AD server from “<Application Folder>/WEB-INF/classes/META-INF/dcma-user-conectivity/user-

connectivity.properties“ file. By default, its value is “mail”. Thus, there must be a “mail” attribute for user in the ldap/active directory database.

user.connectivity_userEmailSearchAttributeFilter=mail

For example, in the below screenshot, mail attribute is shown for ephesoft user.



The screenshot shows an LDAP browser interface. On the left, a tree view displays the hierarchy: World > com > ephesoft > people > ephesoft. The 'ephesoft' user is selected. On the right, a table lists the user's attributes:

attribute type	value
cn	ephesoft
objectClass	inetOrgPerson
sn	surname
mail	ephesoft@abc.com
uid	ephesoft
userPassword	(non string data)
audio	
businessCategory	
carLicense	
departmentNumber	
description	
destinationIndicator	
displayName	
employeeNumber	
employeeType	

At the bottom of the interface are buttons for 'Submit', 'Reset', 'Change Class', and 'Properties'.

In case connectivity is made using tomcat, this attribute needs to be set in tomcat-users.xml.

Please see below screenshot:

```
<role rolename="admin"/>
<role rolename="role1"/>
<role rolename="role2"/>
<role rolename="role3"/>
<user username="ephesoft" password="demo" roles="admin" mail="ephesoft@abc.com"/>
<user username="user1" password="user1" roles="role1"/>
<user username="user2" password="user2" roles="role2"/>
<user username="user3" password="user3" roles="role3"/>
</tomcat-users>
```

Batch Suspend Feature

User can suspend a batch in review or validation and can do following while suspending:

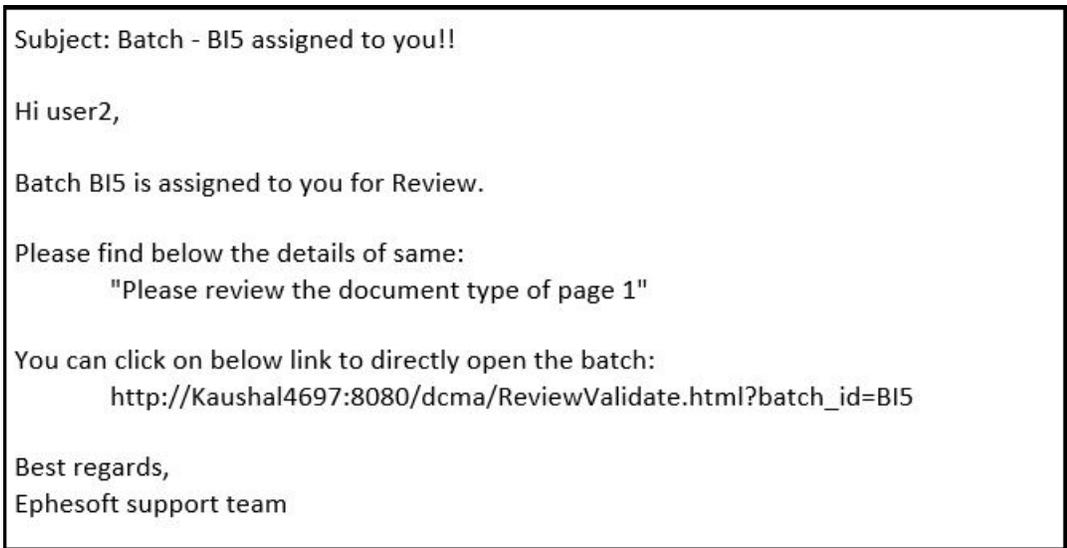
- Assign the suspended batch to another user or group for further verification
- Send an email notification to the user whom the batch has been assigned
 - In case of group, the email is sent to all users in the group

- Add a note while suspending a batch which will be a part of the mail sent and visible on the **Batch List** and **Batch Instance Management** screens



It is important to note that the user who has suspended the batch is be able to view the batch and resume it. Also, user who has been assigned the batch cannot further assign it to any other user/group.

- The content of the email sent out to the assigned user/group is as displayed in the image below:



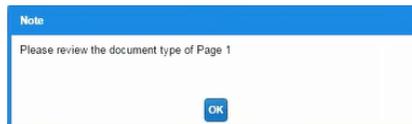
User, to whom batch has been assigned, can see it under **“Assigned To Me”** section on the **“Batch List”** screen:

The screenshot shows the Ephesoft TRANSACT interface. At the top, there are tabs for 'Review', 'Validation', 'Assigned To Me', and 'Open'. The 'Assigned To Me' tab is active. Below the tabs, there is a table with the following columns: 'id', 'Batch Clas...', 'Batch Name', 'Priority', 'Batch Updated On', 'Batch Imported On', 'Batch Status', and 'Batch Note'. A single row is visible with the following data: 'BI4', 'TestDemo22', 'BC7_ephesoft_2016-11-11_12-30-37', '1', '11-Nov-2016 14:51:05', '11-Nov-2016 13:25:36', 'Ready For Review', and 'Please review the docum...'. On the left side, there is a chart titled 'Review Validate Batches' showing a red bar representing the number of batches. Below the chart, there is a legend for 'Category Type' with a red square next to 'Urgent'. At the bottom of the screen, there is a footer with 'Powered by Ephesoft' and a status bar showing 'Page: 1 of 1', 'Displaying 1 - 1 of 1', 'Showing 15 Records per page', and 'Refresh Interval OFF sec'.

On the **Batch Instance Management** screen, the **Is Suspended**, **Assigned To**, and **Batch Note** column display the relevant information about the suspended batch.

The screenshot displays the Ephesoft Batch Instance Management interface. At the top, there are navigation buttons: Open, Restart, Unlock, and Delete. A search bar is located on the right. The main area features a table with the following columns: Id, Batch Name, Status, Priority, Batch Class..., Current User, Imported On, Last Modified, Is Suspended, Assigned To, and Note. Three rows of batch instances are visible, all with a status of 'Ready For Review'. The 'Is Suspended' column shows 'true' for the first row and 'false' for the others. The 'Assigned To' column shows 'user2' for the first row. The 'Note' column contains the text 'Please rev...'. To the left of the table, there is a 'Batch Instance Categories' section with a pie chart and a 'Review Validation Backlog' section with a bar chart. Below the table, there are pagination controls and a 'Batch Execution Details' section. The details section includes fields for Batch Class Name, Batch Identifier, Batch Name, Batch Description, Batch Priority, Current Status, Drop Folder Path, and Workflow Start Time. On the right side of the details section, there are progress indicators for various modules: Folder Import Module (100%), Page Process Module (100%), Document Assembly Module (100%), and Review Document Module (0%).

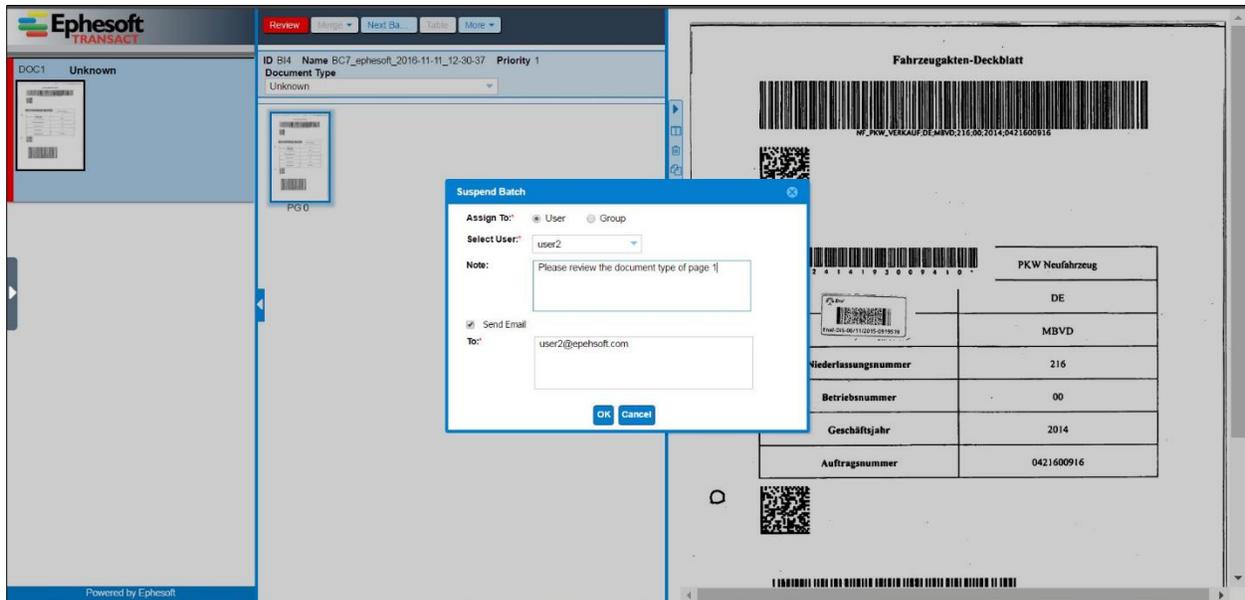
If user click on the note in the Batch Note column, a pop-up with the note displays.



How to Suspend a batch

Ephesoft v4.1.1.0 that allows user to suspend a batch in review/validation.

A pop-up will be displayed to user either by clicking “**Suspend**” exists inside More menu or press shortcut “**Ctrl + Shift + S**” while suspending batch as displayed in the image below.



Assign To: The assign-to option selected by user for assign batch to another user or group. By default, assigned-to is set Users.

Select User/Group: This is drop down that contains users or groups list fetched from tomcat-users/LDAP/AD server as chose option in a property file (**user-connectivity**). Select users/groups list displayed as assign-to option selected.

Note: It is part of the mail sent and is also visible on the **Batch List** and **Batch Instance Management** screens.

Send Email: This option provides privileges to send email notification to the user and group whom the batch is being assigned.

To: This text area would be displayed if send-email option selected by user. By default, this populates configured emails of assignee user and group users. It also gives user the ability to fill emails.

On clicking “Ok” option batch will be suspended.

User who has been assigned the batch cannot further assign it to any other user/group.

Batch Resume Feature

The user who has suspended the batch can also resume the batch while opening a suspended batch from **Batch Instance Management** or **Batch List** screens with option ‘Resume’, ‘View Only’ and ‘Cancel’ or **Review/Validate** screen.

On clicking ‘Resume’ option batch will be released from suspend state and now user who has been assigned the batch will not see the batch into **Assigned To Me** tab on **Batch List** screen.

How to Resume a batch

Following options will be pop up while opening suspended batch from **Batch Instance Management** or **Batch List** screens with option **'Resume'**, **'View Only'** and **'Cancel'** as displayed in the image below.



If User clicks **'Resume'** option batch will be released from suspend state and now user who has been assigned the batch will not see the batch into **Assigned To Me** tab on **Batch List** screen.

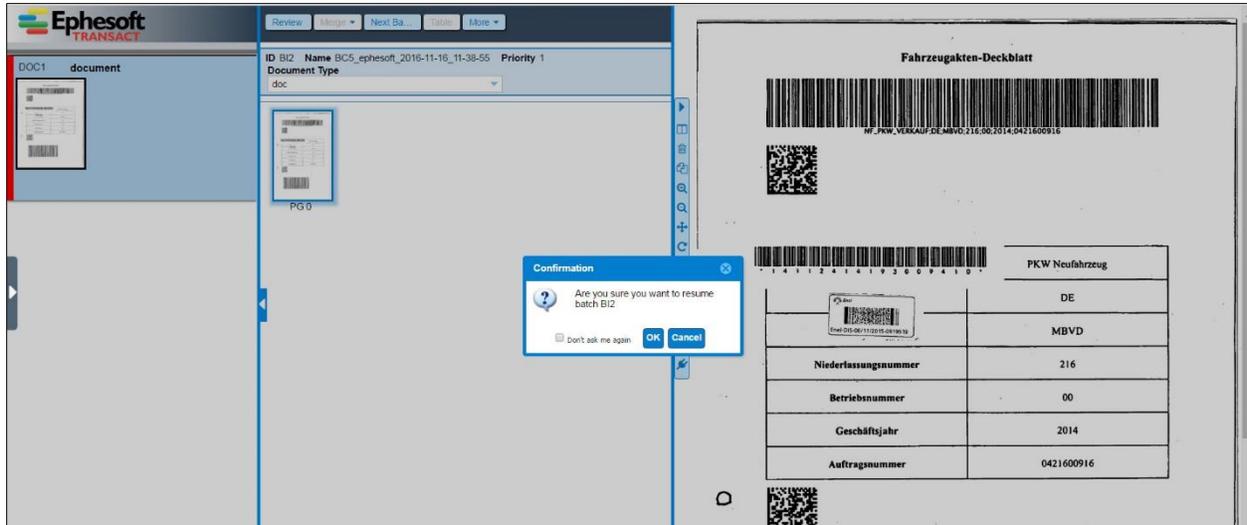
If User clicks **"View Only"** option batch will be opened on review/validate screen and if required, he can select **Resume** option from more menu or by pressing shortcut **"Ctrl + Shift + S"**.

The screenshot shows the Ephesoft Transact interface. On the left, there is a sidebar with a document list. The main area displays a document titled "Fahrzeugakten-Deckblatt" with a barcode and a QR code. A table of vehicle details is visible:

PKW Neufahrzeug	
	DE
	MBVD
Niederlassungsnummer	216
Betriebsnummer	00
Geschäftsjahr	2014
Auftragsnummer	0421600916

The interface also shows a "More" menu with options: Previous Key, External Application, Scanning, Next Batch Algorithm, Resume, Learn Files, and Shortcuts.

Confirmation pop-up will be displayed to user for resuming batch.



On clicking “**OK**” option batch will be released from suspend state and now user who has been assigned the batch will not see the batch into **Assigned To Me** tab on **Batch List** screen.

- Suspended state of the batch will be cleared in case of following:
 - batch is finished,
 - batch is restarted