ScerIS ®

ETCETERA® EPM

## Enterprise Process Management

User Experience

ScerIS has taken some very complex and complicated technology and delivered it in an outstanding user experience. EPM presents a task-focused environment since the feelings of the user generally depend upon having a successful experience in accomplishing the task at hand.

EPM User Experience design follows the tenant of "The Rule of Least Surprise", the purpose of which is to reduce the amount of complexity a user must absorb to use an interface and complete their tasks. EPM is designed to help users easily and efficiently attend to and complete all of their work tasks from within just three presentations:

# The User Experience Is As Simple As ① - ② - ③

1

My Work Queue provides for a summary of all work activities in which the user may be involved. In the summary of work queues it shows the name of the work queue, the number of pending transactions and actions available to the user in each work queue. The user determines if they want to see the detail of transactions in a work queue, and if so that information is presented in a tabbed presentation in the bottom of their user interface in the same order as work queues are presented in summary above. In each detailed work queue, searchable data elements specific to that type of work are used to present information about the pending or suspended transactions. Simply – My Work Queue is one place to go for all my work queue information.
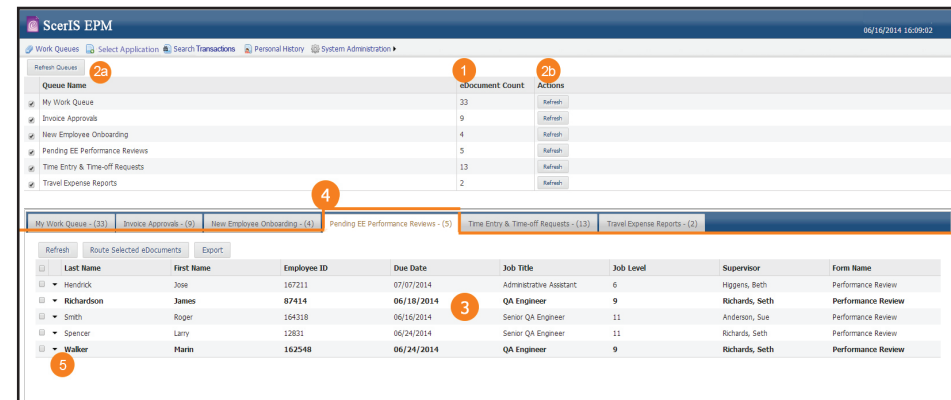
1. Work queues provide a summary of the number of open transactions in that work queue class.

2. Work queues can be refreshed, all at once (2a) or just one work queue at a time (2b) to display the number of transactions waiting in the queue and to refresh the detail work queue listing that is active. As any detail work queue is selected, it is automatically refreshed.

3. For one or as many work queues selected, a listing of all in-process transactions is provided in a tabbed presentation in the bottom of the user experience. The tabbed section lists the AUI details and the order of the tabs is the same order as the work queue summaries at the top of the user's interface.

4. Users can easily identify newly presented transactions because they are bolded for easy identification. Transactions that were previously viewed by the user and returned to their work queue are not bolded.

5. The ▼ on detailed rows provides a list of actions available to the user, based on the user's privileges. These actions include View, View Details, Route, Add a Note, Create Revision and Delete.

2

From My Work Queue users select and open an in-process **Application User Interface** (AUI) or to create a new transaction, simply click on the Select Application button, and they're presented within an organized, tabbed presentation of all AUIs available to the user. A single mouse click or touch (mobile devices) opens the user interface in the browser. Users simply click on the 💝 to select frequently used AUIs and place them into their Favorites tab for rapid access. Some AUIs are Automatically generated and placed into user work queues using the AUI Mapping Utility.
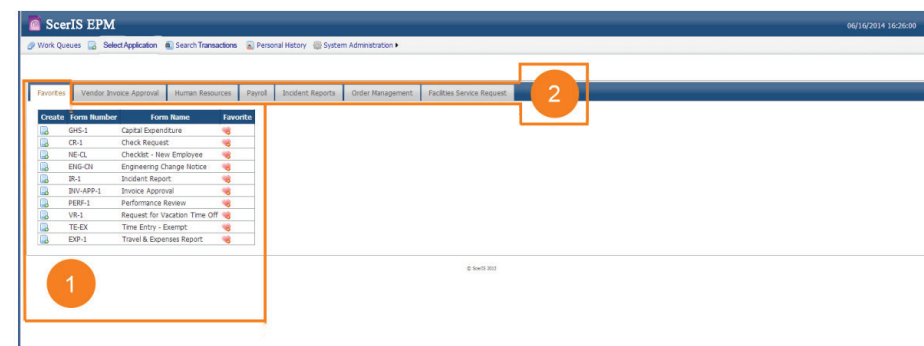
1. Work List of AUIs on a Favorites Tab

2. Tabbed Presentation of AUIs Available to the User

The user only sees the tabs they have permission to view and only see the AUIs that they are permitted to access and use.

3

The **Online Application Interface** replaces traditional application dialog boxes with dynamic intelligent user interfaces. The goal of this type of user interface is to improve the efficiency, effectiveness and naturalness of human to screen interactions.

The AUI can include instructions, and an ability to view supporting documents and add new supporting documents to the transaction (of any file format) either at the transaction level or within specific sections in the AUI. Users can enter data and enrich data from multiple data sources (ODBC views into data sources and API calls).

Conditional controls expose other required data without the need to place the user into another dialog box. Error messages are presented to the user within the AUI, eliminating the need for modal or system dialog boxes that restrict user access to the active application interfaces. The user's entire application experience is in a single, dynamic, AUI in which they can complete all related work without leaving the environment.
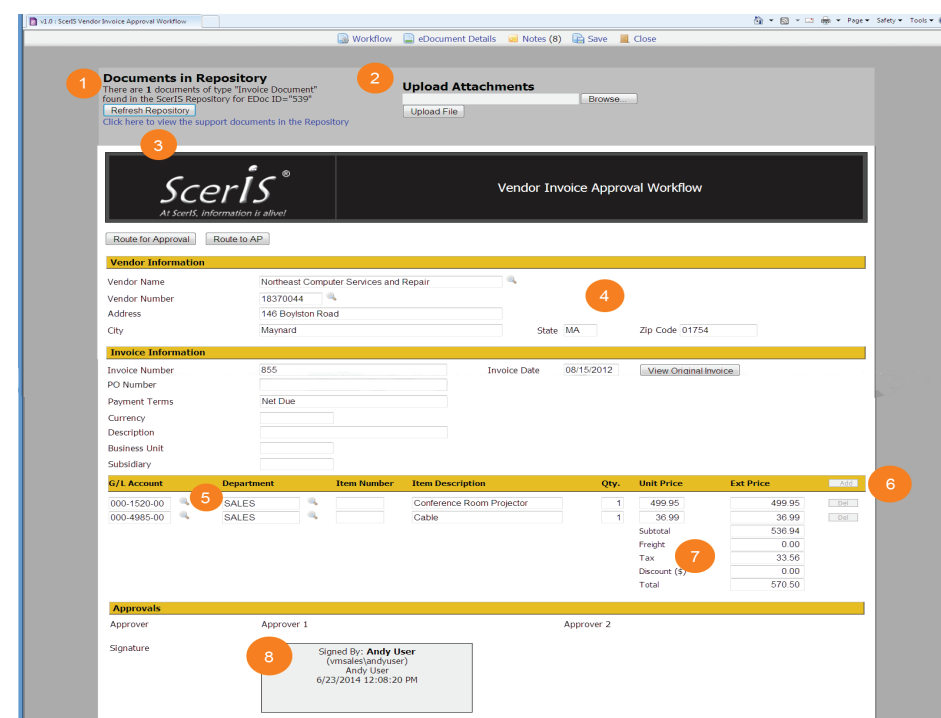
1. Shows how many documents support this transaction, if any.

2. Easy way to browse and upload the primary supporting document (if any) or images of other related documents or files (if any). In this example supporting documents are added to the transaction, but supporting documents can also be connected directly to a section of the AUI. Some applications don't involve supporting documents.

3. Retrieves all related documents for viewing with a single click. If more than one document is related to the application a list is presented and the user can select one or more documents to view. If documents are associated with a section or a field, the view capability is often deployed with the section or field.

4. An example of the user performing a lookup for data validations and auto-filling selected fields with data from external sources.

5. An example of the user performing lookups for data to select correct values in a "Repeater Container" that allows the user to dynamically add sections for the number of rows needed to complete their work. In this example, the user is applying account coding with links to the ERP Chart of Accounts. The ADD button adds rows as required.

6. Buttons for adding or deleting rows. In this example, adding rows offers an easy way to split the amount of the invoice into multiple account codes.

7. This user interface includes other variables in a calculation.

8. Signature Blocks provide for signing using Windows Credentials (Active Directory) or ScerIS user credentials or capture signatures using a signature pad or on mobile devices.

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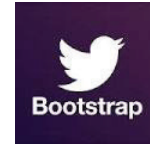
About ScerIS

ScerIS is a resource to its customers for Big Impact solutions and services. Founded in 1993, the company's focus is to help customers retool business processes, automate people centric work, improve workforce productivity and utilize key performance indicators that help position them for increased profitability.

ScerIS is a resource to its customers in healthcare, financial services, business and government. Serving 16 major markets and over 100 industries, ScerIS provides Business Process Improvement Solutions, Business Intelligence Reporting and Data Analytics Tools, Mobile Workforce Solutions, Custom System Design, Implementation Services & Business Process Outsourcing.

ScerIS is the software developer of ETCETERA®, the platform for business process improvement, content management, business intelligence and data analysis. ScerIS also provides Managed Cloud Services, Professional Services and Outsourced Services rounding out its value to customers.

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