

HOW TO: TEST/VALIDATE EXCEPTION MANAGER



- With Exception Manager, documents will generate an alert in the testing phases. The alerts will need to be reviewed, corrected and approved before delivery to the test ERP system.
- Follow the steps outlined below for best practices when reviewing test documents in Exception Manager.

Testing Exception Manager



Testing your Exception Manager:

Exception Manager Alerts will appear in an “Under Review” status in the portal after processing. Open the alert to enter the User Interface.

Once in the Exception Manager screen compare the data extracted from the original document to the values in the right-hand side and check the following:

1. **Data Extraction and Contextualization Accuracy:** Check the data, line by line and confirm it has extracted the expected values.
 - Is the number of lines accurate?
 - Is the order of lines accurate?
 - Is the document is being split correctly? (if applicable)
 - Is the data from the original document extracted and contextualized correctly? Check all Header, Footer and Line fields.
 - *Example:* Was the buyer captured?
 - Are requested transformations being accurately applied?
 - Note this might make the information different than what had originally appeared on the document.
 - *Example:* Removing special characters from a part number.
2. **Validations:** Check that all validations align with the expected outcomes. These are the green, blue and red fields.
 - Are expected errors being flagged and labeled red?
 - Are any fields giving an incorrect error or incorrect validation?

(continued in next page)

What Are You Assessing During Testing?

- ✓ **Confirming Data Extraction and Contextualization:** Review what was extracted from the document and how the is data is being shown in exception manager and where.
- ✓ **Validating Expected Functionality:** Review the validations, both red and green to confirm it aligns with the expected outcomes.

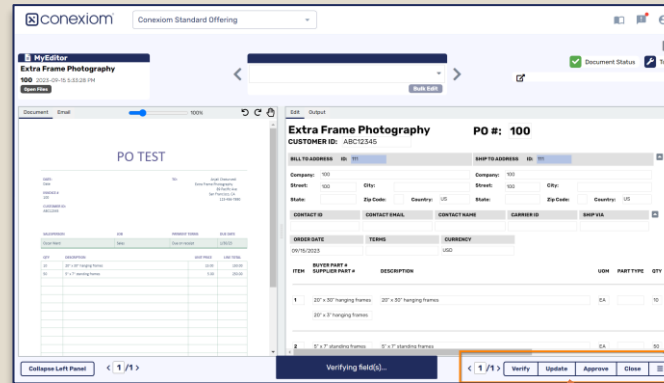
The screenshot displays the Conexiom Exception Manager interface. At the top, there's a 'Conexiom Standard Offering' dropdown and a 'MyEditor' section for 'Extra Frame Photography' with a document ID of 100 and a timestamp of 2023-09-15 5:33:28 PM. A search bar shows '20" x 3" hanging frames' with a 'Bulk Edit' button. A notification states 'No match found for this Supplier Part Number'. The main area is split into 'Document' and 'Output' views. The 'Document' view shows a 'PO TEST' with fields for DATE, TO, INVOICE #, CUSTOMER ID, SALESPERSON, JOB, PAYMENT TERMS, DUE DATE, and a table of items. The 'Output' view shows a form for 'Extra Frame Photography' with fields for BILL TO ADDRESS, SHIP TO ADDRESS, Company, Street, City, State, Zip Code, Country, CONTACT ID, CONTACT EMAIL, CONTACT NAME, CARRIER ID, SHIP VIA, ORDER DATE, TERMS, CURRENCY, BUYER PART #, SUPPLIER PART #, DESCRIPTION, UOM, PART TYPE, and QTY. A red box highlights the '20" x 3" hanging frames' entry in the output table, which corresponds to the search term in the search bar. The bottom of the interface has navigation buttons like 'Collapse Left Panel', '1/1', 'Verify', 'Update', 'Approve', and 'Close'.

HOW TO: TEST/ VALIDATE EXCEPTION MANAGER (continued)



Testing Exception Manager (continued)

3. **Approving the Document to Deliver:** To successfully deliver a document to your ERP, you will first need to approve the exception manager alert.
 - Once you are sure:
 - ✓ All data is correct
 - ✓ All validations are correct, and errors have been fixed as needed
 - Click on **Approve** on the bottom right corner.
 - This will change the document status to a 'Validation Required' status in the test documents area of the Customer/Vendor Details, and it will be ready to deliver to your ERP system for further testing.



VALIDATION REQUIRED

If the validations are not as expected, then please check:

- ✓ The document data was properly extracted and contextualized, for example perhaps the wrong address was captured as the ship to address
- ✓ Check your cross-reference table data or ERP data (depending on data source), outdated or incorrect data in the table or your test ERP system could result in incorrect validations in Conexiom

Addressing Issues:

If you encounter any issues, follow these steps:

1. Review all documents/alerts for potential problems.
 - Take note of the issue seen including the document number and line number.
2. Once all documents are reviewed and all notes are collected then Submit a change request.
 - Send 1 change request for all needed changes, follow our Change Request Best Practices
3. For assistance, contact your Conexiom Representative.

Once the requested changes have been made the alerts will be regenerated and you can review before delivering to your ERP system.

Repeat the process as needed.