IBM Cúram Social Program Management
8.0.0

Cúram Social Enterprise Collaboration Configuration Guide

Note

Before using this information and the product it supports, read the information in "Notices" on page 18

Edition

This edition applies to IBM® Cúram Social Program Management 8.0.0.

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Chapter 1. Configuring Social Enterprise Collaboration

You can configure the information that is displayed in multidisciplinary team portals. The tools that are available in the multidisciplinary team portals can be configured. Tools are provided to report incidents, record transactions, and post discussions.

Purpose

The following pages describe the configuration options for social enterprise folders and multidisciplinary teams as part of Cúram Social Enterprise Collaboration. This includes determining the information that is displayed in social enterprise folders and multidisciplinary team portals. It also includes configuring the tools available within the social enterprise folders and multidisciplinary team portals. Tools are provided to report incidents, record transactions, and post discussions. For information on the configuration options for the Cúram Citizen Context Viewer, see the *Configuring the Citizen Context Viewer* related link.

Audience

The target audience is administrators who are responsible for configuring the Cúram Social Enterprise Collaboration components. It is assumed that the administrators are familiar in working with code tables, application properties, and system security as part of Cúram system administration.

Prerequisites

Before you use the following pages, ensure that you are familiar with the *Cúram Social Enterprise Collaboration Guide* related link.

Related information

Configuring the Citizen Context Viewer

Cúram Social Enterprise Collaboration Guide

Configuring Social Enterprise Folders and Multidisciplinary Teams

The configuration options within Cúram Social Enterprise Collaboration administration include setting up social enterprise folder types, predefined multidisciplinary teams, and multidisciplinary team members.

This chapter describes the configuration options available as property settings for social enterprise folders and multidisciplinary teams. For social enterprise folders, this includes configuring the case types that can be added to social enterprise folders and configuring the automatic creation of social enterprise folder relationships. For multidisciplinary teams (MDTs), this includes configuring MDT member notifications and the configuration options for the MDT portal.

Configuring the SEF Types

Each social enterprise folder type is associated with a multidisciplinary team type. Multidisciplinary team types can either be predefined or else defined from within a specific social enterprise folder. A home page identifier can be set if the default home page provided out of the box to view this type of SEF in the MDT Portal needs to overriden.

Note: Social enterprise folder types are associated with the SEFType code table. A new type can be dynamically added to this code table and published as part of system administration.

Setting Up Predefined MDTs

Social enterprise folder types can be associated with predefined multidisciplinary teams by selecting the 'Predefined' multidisciplinary team type. When a social enterprise folder is created for the social enterprise folder type, it's multidisciplinary team must be selected from the list of pre-configured multidisciplinary teams (see "Configuring Multidisciplinary Teams and Team Members" on page 2).

In some jurisdictions, membership for multidisciplinary teams is defined by statute. Also, multidisciplinary teams dealing with child welfare cases may be required by law to include law enforcement, child protection or family services, and prosecution participant. The business logic for selecting predefined MDTs is described in the `Cúram Social Enterprise Collaboration Guide`.

Defining a Multidisciplinary Team for an Individual SEF

When the 'Define From Social Enterprise Folder' option is selected (instead of the 'Predefined' option), individual multidisciplinary team members are manually defined for the social enterprise folders.

An example of where this is appropriate is an ongoing child welfare case aimed at assisting children within a family who have been in abusive situations. The multidisciplinary team assigned to helping these children would include persons with experience working with the children and who have established positive relationships with the family, e.g., teachers, coaches, etc. For more information, see the `Cúram Social Enterprise Collaboration Guide`.

Configuring Multidisciplinary Teams and Team Members

The main task for configuring predefined multidisciplinary teams is to define the team members. There are three options for selecting team members: selecting from existing team members, adding new team members who can then be selected for other teams in the future, and selecting from existing system users.

Multidisciplinary team members are configured on the View Multidisciplinary Team page. The first MDT member added to a team is the default lead member. The lead member can be changed at any time to any active member of the MDT.

Each team member on the team must fulfill a role within their multidisciplinary teams, e.g., psychologist, nurse, and so on. Roles must be defined before a multidisciplinary team member can be assigned a role. A role can be defined using the New Role page.

The Role field captures the Role name. The Type is used to identify if this role applies to an external user (MDT member) or an internal user (internal system user).

Outcome plan activities (services, actions, referrals) may be shared with external multidisciplinary team members via the collaborative outcome plan. Notes and attachments may be shared with external multidisciplinary team members via the collaborative outcome plan and collaborative investigation. The Sharing options dictate the information that multidisciplinary team members assigned to this role will have access to in the MDT portal. Note these options are only available for roles of type external. Internal system users access is controlled by sensitivity checking. Attachments, Activities and Notes can be shared. For each option the following options are available:

- Not Shared - This means that the item cannot be shared with the team member assigned to the specified role. If defined, team members with this role will not appear in the lists of team members with whom the item can be shared.
- Shared (Preselected) - If defined, any team member who fills the specified role will be included in the list of members with whom the item can be shared. The checkbox displayed in the list to indicate whether the item is to be shared with the team member will be automatically selected.
- Shared (Not Preselected) - If defined, any team member assigned to the specified role will be included in the list of members with whom the item can be shared. The checkbox displayed in the list to indicate whether the item is to be shared with the team member will not be selected. The user must click on the checkbox to share the item with the team member.

In addition to viewing and maintaining team members as part of an MDT team, configuration options are available to maintain a team member's contact details, define the team member's skills, and add a member to any number of teams from the View Multidisciplinary Team page.

MDT members are assigned a sensitivity level which determines security access to data in the MDT portal. Sensitivity checking is performed by comparing the MDT member's sensitivity level to the sensitivity level of secured data (sensitivity levels range from 1-5 with 5 being the most secure level). The following data is assigned a sensitivity level and therefore may impact MDT member access to that data: discussions, incidents, clients, cases, social enterprise folder transactions, attachments, meetings, communications, meeting minutes.

Configuring the Case Types Supported in SEFs

There are two application properties for configuring the case types supported in social enterprise folders (SEFs). These are the case types that can be part of social enterprise folders. One application property is used to support all case types; the other is used to select the specific case types.

- The application property, curam.ise.sef.casetypes.allowall , indicates whether or not all case types are supported in social enterprise folders. The default value is 'NO'.
- The application property, curam.ise.sef.casetypes , indicates the specific case types that are supported in social enterprise folders. This is achieved by setting the value of this property to be a comma-delimited list of codes from the CaseTypeCode codetable. The default value is 'CT2,CT5', the codes for the product delivery and integrated case types.

Configuring SEF Relationships

The application property, `curam.ise.sef.client.createrelationship`, is used to configure the automatic creation of social enterprise folder relationships when new clients are added to a social enterprise folder. The default value is *YES*; when a new client is added to a social enterprise folder, the system will automatically create a relationship between the social enterprise folder the client is being added to and any of the client's existing social enterprise folders.

Configuring MDT Member Notifications

The application property, curam.ise.send.mdtmembers.notifications , defines whether an email is sent to multidisciplinary team members when they are added or removed from a team. It also defines whether the team leader is notified when a member is added or removed from a team and when the team leader changes. The default value is 'YES'. It is important for email addresses to be set up for all multidisciplinary team members to ensure that the notifications are issued correctly.

Configuring the MDT Portal

This section describes the application properties available for configuring the information displayed in the MDT portal.

Configuring Time Period for Displaying Tasks on Portal Home Page

The curam.mdtexternal.numDaysTasksToDisplayWorkspaceHome application property indicates the maximum number of days following the current date for which tasks that are assigned to the multidisciplinary team member are displayed on the member's portal home page. The default value is 7. Tasks will remain in the MDT portal for up to seven days after being assigned to a multidisciplinary team member.

Configuring Time Period for Displaying Meeting Invites on Portal Home Page

The application property, curam.mdtexternal.numDaysMeetingsToDisplayWorkspaceHome , indicates the maximum number of days following the current date for which meetings the multidisciplinary team member is scheduled to attend are displayed on the member's portal home page. The default value for this is 7. Scheduled meetings will remain in the MDT portal for up to seven days after the multidisciplinary team member has been invited to attend.

Configuring Number of Meeting Minutes Displayed on Portal Home Page

The application property, curam.mdtexternal.numMeetingMinutesToDisplayWorkspaceHome , indicates the maximum number of meeting minutes to display on an MDT member's portal home page. The default value for this is 5. The system retrieves all meeting minutes which have been issued to the MDT member and displays the first five retrieved.

Configuring Time Period for Displaying Tasks on My Tasks Page

The application property, curam.mdtexternal.numDaysTasksToDisplayMyTasks , indicates the maximum number of days following the current date for which tasks assigned to the MDT member are displayed on the member's My Tasks page. The default value for this is 30. Tasks will remain on the MDT member's My Task page for up to thirty days after being assigned to the multidisciplinary team member.

Configuring Display of Affected Clients on Incidents

The application property, `curam.mdtexternal.starUnmanagedClientsOnIncidents`, determines how affected clients on incidents are displayed. Since incidents can have more than one affected client, there can be clients involved who are not actually managed by the multidisciplinary team (MDT) member. This property controls whether or not those clients are starred out so that MDT members can only see information about their own clients. The default value is *YES*; affected clients who are not managed by the MDT member will be starred out

Configuring Discussions

Discussions are communication tools allowing caseworkers and multidisciplinary team members involved with a social enterprise folder, outcome plan and investigation to post comments or questions online.

Configuring the Default Type of Discussion Moderator

The application property, `curam.ise.discussion.discussionsModerator`, is used to configure the default type of discussion moderator. The default value is CASEOWNER. This means that by default, the moderator of all discussions in a social enterprise folder, investigation or outcome plan is set to the caseowner. The default type can also be CASESUPERVISOR, MDTLEADER, or USERDEFINED. If the application property is set to USERDEFINED, then a user must be specified as the default moderator (see "Specifying a User as the Default Moderator for Discussions" on page 5).

When the default type is set to CASEOWNER, CASESUPERVISOR, or MDTLEADER, it is possible that more than one user can be assigned to these roles. To assign a single user to the role of discussion moderator, the processing steps described in the following table occur:

Table 1. Process to Determine User Assigned to Role of Discussion Moderator

Default Type of Discussion Moderator	Process to Determine User
Caseowner	If the caseowner of a social enterprise folder or investigation is a position, organization unit, or work queue, then the system assigns the role of discussion moderator to the supervisor of the social enterprise folder. The owner of an outcome plan can only be a user by default and so the system assigns the role of discussion moderator to the supervisor of the outcome plan. If there is more than one supervisor or no supervisor, then the discussion moderator is set to the system defined moderator. If there is no user assigned the role of system defined moderator, then the discussion moderator is set to the SYSTEM user.

Default Type of Discussion Moderator	Process to Determine User
Supervisor	If more than one user fills the role of supervisor or if there is no supervisor, then the discussion moderator is set to the system defined moderator. If there is no user assigned, the role of system defined moderator, then the discussion moderator is set to the SYSTEM user.
MDT Leader	The MDT leader will be a user but if an MDT has not yet been assigned apply the following hierarchy: 1. Set the moderator to be the system defined moderator 2. If the system defined moderator is not set, set the SYSTEM user to be the moderator.

Table 1. Process to Determine User Assigned to Role of Discussion Moderator (continued)

Specifying a User as the Default Moderator for Discussions

The application property, `curam.ise.discussion.userDefinedModerator`, is used in conjunction with the application property, `curam.ise.sef.discussionsModerator`, to specify a user as the default moderator for discussions on a SEF. For example, to specify a user named, JWilliams, as the default moderator, it is necessary to first set the `curam.ise.sef.discussionsModerator` to USERDEFINED and then `curam.ise.sef.userDefineModerator` can then be set to JWilliams.

Configuring the Number of Comments Per Discussion Page

The application property, curam.ise.discussion.commentsPerPage , determines how many comments are shown per page in a paginated discussion. The default value is '5', such that each discussion page can hold up to a maximum of 5 comments.

Providing Access to Discussion View Page in Email Notifications

The application property, curam.discussion.viewURL , provides access to the discussion view page in email notifications. It specifies the web address of the discussion view page, the default value of which is Discussion_viewDiscussion. Agencies can change the value of this application property to link to their own discussion view page.

Providing Access to Stop Watching Discussions in Email Notifications

The application property, curam.discussion.stopWatching , provides access to the stop watching discussion page in email notifications. It specifies the web address of the stop watching discussion page, the default value of which is Discussion_stopWatchingFromEmail. Agencies can change the value of this application property to link to their own discussion view page.

Emailing Discussion Watchers when Updates Occur

The application property, curam.discussion.sendEmailNotifications , specifies whether or not email notifications should be sent to discussion watchers when updates occur. The default is 'NO' such that discussion watchers are not emailed when updates occur.

Compliancy for Social Enterprise Collaboration

Social Enterprise Collaboration has a public API that you can use in your application code. The component Javadoc is the definitive means of identifying which public classes, interfaces and methods form the public API. The public API will not have any components changed or removed without following Cúram standards for handling customer impact.

Social Enterprise Collaboration also contains some public classes, interfaces and methods, which do not form part of the API.

Important: To be compliant, do not make dependencies on any class or interface. No methods should be called other than those described in the JavaDoc.

Classes, interfaces and methods outside of the public API are subject to change or removal without notice. Unless otherwise stated in the JavaDoc, you must not place any of your own classes or interfaces in the same package as that of the Social Enterprise Collaboration component.

Configuring Transaction Histories

By default, a number of social enterprise folder (SEF) transactions have been configured to appear in the transaction log. To disable any of these transactions, thus removing them from the transaction log, it is necessary to create and configure application properties. This chapter provides sample application properties for disabling social enterprise folder transactions.

Enabled SEF Transactions

This section describes the social enterprise transactions that have been configured to appear in the transaction log. Each social enterprise transaction is linked to a code in the `CaseTransactionEvents` codetable. These codes are used to create application properties to disable the transaction.

For example, the code for the 'Social Enterprise Folder Created' transaction, is SEFET97. The property name, therefore, should be curam.config.transaction.disabled.SEFET97. Samples for disabling social enterprise folder transactions are provided in "Sample Application Properties for Disabling Transactions" on page 13.

SEF Status, Case, and Client Transactions

The following table describes transaction types that have been enabled in relation to social enterprise folder statuses, cases, and clients:

Table 2. Transaction Types for Social Enterprise Folder Statuses, Cases, and Clients

Transaction Type	Transaction Description	Transaction Example	Code
Social Enterprise Folder Created	<SEF Type> - <caseID> created	Child Welfare - 257 created	SEFET97
Social Enterprise Folder Closed	<SEF Type> - <caseID> closed	Child Welfare - 257 closed	SEFET98
Social Enterprise Folder Reopened	<SEF Type> - <caseID> reopened	Child Welfare - 257 reopened	SEFET99
Case Added to Social Enterprise Folder	<Case Type> - <caseID> added to <SEF Type> - <caseID>	Food Stamps - 266 added to Child Welfare - 257	SEFET102
Case Removed from Social Enterprise Folder	<Case Type> - <caseID> removed from <SEF Type> - <caseID>	Food Stamps - 266 removed from Child Welfare - 257	SEFET103
Client Added to Social Enterprise Folder	<Participant Name> added to <SEF Type> - <caseID>	John Smith added to Child Welfare - 257	SEFET100

Table 2. Transaction Types for Social Enterprise Folder Statuses, Cases, and Clients (continued)			
Transaction Type	**Transaction Description**	**Transaction Example**	**Code**
Client Removed from Social Enterprise Folder	<Participant Name> removed from <SEF Type> - <caseID>	John Smith removed from Child Welfare - 257	SEFET101
Social Enterprise Folder Relationship Created	Social Enterprise Folder Relationship with <related SEF Type> - <related caseID> created	Social Enterprise Folder Relationship with Child Welfare - 257 created	SEFET111
Social Enterprise Folder Relationship Modified	Social Enterprise Folder Relationship with <related SEF Type> - <related caseID> modified	Social Enterprise Folder Relationship with Child Welfare - 257 modified	SEFET112
Social Enterprise Folder Relationship Deleted	Social Enterprise Folder Relationship with <related SEF Type> - <related caseID> deleted	Social Enterprise Folder Relationship with Child Welfare - 257 deleted	SEFET113

Multidisciplinary Team and Team Member Transactions

The following table describes transaction types that have been enabled in relation to multidisciplinary teams and team members:

Table 3. Transaction Types for Multidisciplinary Teams and Team Members			
Transaction Type	**Transaction Description**	**Transaction Example**	**Code**
Multidisciplinary Team Added	<Multidisciplinary Team Name> added to <SEF Type> - <caseID>	Multidisciplinary Team added to Child Welfare - 257 (for predefined MDTs, this will include the MDT name)	SEFET109
Multidisciplinary Team Removed	<Multidisciplinary Team Name> removed from <SEF Type> - <caseID>	Multidisciplinary Team removed from Child Welfare - 257 (for predefined MDTs, this will include the MDT name)	SEFET110
Multidisciplinary Team Member Added	<MDT Member Name> added to <SEF Type> - <caseID>	Dr. Linda Chang added to Child Welfare - 257	SEFET107
Multidisciplinary Team Member Removed	<MDT Member Name> removed from <SEF Type> - <caseID>	Dr. Linda Chang removed from to Child Welfare - 257	SEFET108

Note: Sample application properties for disabling the multidisciplinary team and team member transactions are provided in "Sample Application Properties for Disabling Transactions" on page 13.

Meeting and Meeting Minute Transactions

The following table describes transaction types that have been enabled in relation to meetings and meeting minutes:

Table 4. Transaction Types for Meetings and Meeting Minutes

Transaction Type	Transaction Description	Transaction Example	Code
Meeting Created	<Meeting Subject> meeting scheduled <start date> at <start time> created	Review SEF Cases meeting scheduled for 12/12/2007 at 13:15 created	SEFET117
Meeting Modified	<Meeting Subject> meeting scheduled <start date> at <start time> modified	Review SEF Cases meeting scheduled for 12/12/2007 at 13:15 modified	SEFET118
Meeting Deleted	<Meeting Subject> meeting scheduled <start date> at <start time> deleted	Review SEF Cases meeting scheduled for 12/12/2007 at 13:15 deleted	SEFET119
Meeting Minutes Created	Minutes created for <Meeting Minutes Subject> meeting held on <start date> at <start time>	Minutes created for Review SEF Cases meeting held on 12/12/2007 at 13:15	SEFET114
Meeting Minutes Modified	Minutes modified for <Meeting Minutes Subject> meeting held on <start date> at <start time>	Minutes modified for Review SEF Cases meeting held on 12/12/2007 at 13:15	SEFET115
Meeting Minutes Deleted	Minutes deleted for <Meeting Minutes Subject> meeting held on <start date> at <start time> created	Minutes deleted for Review SEF Cases meeting held on 12/12/2007 at 13:15	SEFET116

Discussion Transactions

The following table describes transaction types that have been enabled in relation to discussions:

Table 5. Transaction Types for Discussions

Transaction Type	Transaction Description	Transaction Example	Code
Discussion Created	<Discussion Subject> discussion posted by <Posted By User> on <Posted Date> at <Posted Time>	Emergency Benefits discussion posted by CASEWORKER on 12/12/2007 at 13:15	SEFET127
Discussion Modified	<Discussion Subject> discussion modified by <Posted By User> on <Posted Date> at <Posted Time>	Emergency Benefits discussion modified by CASEWORKER on 12/12/2007 at 15:15	SEFET128

Table 5. Transaction Types for Discussions (continued)			
Transaction Type	**Transaction Description**	**Transaction Example**	**Code**
Discussion Deleted	<Discussion Subject> discussion deleted by <Posted By User> on <Posted Date> at <Posted Time>	Emergency Benefits discussion deleted by CASEWORKER on 12/12/2007 at 17:15	SEFET129
Discussion Comment Created	Comment added to <Discussion Subject> discussion by <Posted By User> on <Posted Date> at <Posted Time>	Comment added to Emergency Benefits discussion by CASEWORKER on 12/12/2007 at 13:15	SEFET137
Discussion Comment Modified	Comment on <Discussion Subject> discussion modified by <Edited By User> on <Edited Date> at <Edited Time>	Comment on Emergency Benefits discussion modified by SUPERUSER on 12/12/2007 at 15:15	SEFET138
Discussion Comment Deleted	Comment on <Discussion Subject> discussion deleted by <Edited By User> on <Edited Date> at <Edited Time>	Comment on Emergency Benefits discussion deleted by SUPERUSER on 12/12/2007 at 17:15	SEFET139

Important: There are three application properties controlling the display of discussion comment transactions: curam.config.transaction.disabled.SEFET137, curam.config.transaction.disabled.SEFET138, and curam.config.transaction.disabled.SEFET139. By default, these properties are set to 'YES' such that discussion comment transactions will not appear in transaction histories.

Communication Transactions

The following table describes transaction types that have been enabled in relation to communications:

Table 6. Transaction Types for Communications			
Transaction Type	**Transaction Description**	**Transaction Example**	**Code(s)**
Communications Inserted	<Communication Type> communication created for correspondent <Correspondent Name>	Email created for correspondent James Smith	ET49 for emails
Communications Modified (Recorded Communications and Emails)	<Communication Type> communication modified for correspondent <Correspondent Name>	Email communication modified for correspondent James Smith	ET47 for recorded communications, ET50 for emails
Communications Cancelled (Recorded Communications and Emails)	<Communication Type> communication cancelled for correspondent <Correspondent Name>	Hard copy communication cancelled for correspondent James Smith	ET48 for recorded communications, ET51 for emails

Table 6. Transaction Types for Communications (continued)

Transaction Type	Transaction Description	Transaction Example	Code(s)
Communication Sent	<Communication Type> communication for correspondent <Correspondent Name> sent	Email Communication for correspondent James Smith sent	ET94 for emails
Pro Forma Communication Inserted	<Pro Forma Type> created for correspondent <Correspondent Name>	Case Closure Client Notification created for correspondent James Smith	ET52
Pro Forma Communication Changed	<Pro Forma Type> modified for correspondent <Correspondent Name>	Case Closure Client Notification modified for correspondent James Smith	ET53
Pro Forma Communication Cancelled	<Pro Forma Type> cancelled for correspondent <Correspondent Name>	Case Closure Client Notification modified for correspondent James Smith	ET54
Pro Forma Communication Sent	<Pro Forma Type> for correspondent <Correspondent Name> sent	Case Closure Client Notification for correspondent James Smith sent	ET95
Word Document Communication Inserted	<Template Name> created for correspondent <Correspondent Name>	Meeting Request created for correspondent James Smith	ET55
Word Document Communication Changed	<Template Name> modified for correspondent <Correspondent Name>	Meeting Request modified for correspondent James Smith	ET56
Word Document Communication Cancelled	<Template Name> cancelled for correspondent <Correspondent Name>	Meeting Request cancelled for correspondent James Smith	ET57
Word Document Communication Sent	<Template Name> for correspondent <Correspondent Name> sent	Meeting Request for correspondent James Smith sent	ET96
Notes Inserted	User note created by <UserName> on <creationDate>	User note created by SUPERUSER on 17/01/2008	ET68
Notes Modified	User note modified by <UserName> on <updateDate>	User note modified by SUPERUSER on 17/01/2008	ET69
Notes Deleted	User note deleted by <UserName> on <deletionDate>	User note deleted by SUPERUSER on 17/01/2008	ET70

Attachment Transactions

The following table describes transaction types that have been enabled in relation to attachments:

Table 7. Transaction Types for Attachments

Transaction Type	Transaction Description	Transaction Example	Code
Attachment Added	<File Name or Reference> file added to <SEF Type> - <caseID>	Medical Report file added to Child Welfare - 257	SEFET120
Attachment Modified	<File Name or Reference> file modified on <SEF Type> - <caseID>	Medical Report file modified on Child Welfare - 257	SEFET121
Attachment Deleted	<File Name or Reference> file deleted from <SEF Type> - <caseID>	Medical Report file deleted from Child Welfare - 257	SEFET122
File Added to Incident	<File Name or Reference> file added to Suspected Abuse incident affecting <Client Name>	Medical Report file added to Suspected Abuse incident affecting James Smith	SEFET130
File Modified on Incident	<File Name or Reference> file modified on Suspected Abuse incident affecting <Client Name>	Medical Report file modified on Suspected Abuse incident affecting James Smith	SEFET131
File Deleted from Incident	<File Name or Reference> file deleted from Suspected Abuse incident affecting <Client Name>	Medical Report file deleted from Suspected Abuse incident affecting James Smith	SEFET132
File Added to Discussion	<File Name or Reference> file added to <Discussion Subject> discussion	Medical Report file added to Emergency Benefits discussion	SEFET123
File Deleted from Discussion	<File Name or Reference> deleted from <Discussion Subject> discussion	Medical Report file deleted from Emergency Benefits discussion	SEFET124
File Added to Discussion Post	<File Name or Reference> file added to <Discussion Subject> discussion posting on <posting date> at <time>	Medical Report file added to Emergency Benefits discussion posting on 25/02/2008 at 15:10	SEFET125

Table 7. Transaction Types for Attachments (continued)			
Transaction Type	**Transaction Description**	**Transaction Example**	**Code**
File Deleted from Discussion Post	<File Name or Reference> file deleted from <Discussion Subject> discussion posting on <posting date> at <time>	Medical Report file deleted from Emergency Benefits discussion posting on 25/02/2008 at 15:10	SEFET126
File Added to Meeting Minutes	<File Name or Reference> file added to <Minutes Subject> minutes for meeting held on <start date> at <start time>	Medical Report file added to the MDT Review minutes for meeting held on 12/12/2007 at 13:15	SEFET134
File Modified on Meeting Minutes	<File Name or Reference> file modified on <Minutes Subject> minutes for meeting held on <start date> at <start time>	Medical Report file modified on the MDT Review minutes for meeting held on 12/12/2007 at 13:15	SEFET135
File Deleted from Meeting Minutes	<File Name or Reference> file deleted from <Minutes Subject> minutes for meeting held on <start date> at <start time>	Medical Report file deleted from the MDT Review minutes for meeting held on 12/12/2007 at 13:15	SEFET136
Meeting Minutes Issued	Minutes issued to <Invitee Name, Invitee Name> for <Meeting Minutes Subject> meeting held on <start date> at <start time>	Minutes issued to John Smith, Dr. Jessica Change for Review SEF Cases meeting held on 12/12/2007 at 13:15	SEFET133
File Added to Communication	<File Name or Reference> file added to <Communication Method> communication for correspondent <Correspondent Name>	Medical Report file added to Hard Copy communication for correspondent James Smith	ET97
File Modified on Communication	<File Name or Reference> file modified on <Communication Method> communication for correspondent <Correspondent Name>	Medical Report file modified on Hard Copy communication for correspondent James Smith	ET98

Table 7. Transaction Types for Attachments (continued)			
Transaction Type	**Transaction Description**	**Transaction Example**	**Code**
File Deleted from Communication	<File Name or Reference> file deleted from <Communication Method> communication for correspondent <Correspondent Name>	Medical Report file deleted from Hard Copy communication for correspondent James Smith	ET99

Adding Application Properties to Disable SEF Transactions

With the exception of discussion comments, all social enterprise folder (SEF) transactions are enabled by default. Application properties must be added and set to disable these transactions.

The steps to do this are as follows:

1. Log in as system administration.
2. Link to the **Properties** page.
3. Select the **Add Property** option.
4. Enter the property details. For help on completing these details, see "Sample Application Properties for Disabling Transactions" on page 13.
5. Save the new property.
6. Select the **Publish Changes** option.
7. Confirm the publication of the property information.

Sample Application Properties for Disabling Transactions

This section provides sample application properties for disabling the multidisciplinary team and team member transactions described in "Multidisciplinary Team and Team Member Transactions" on page 7.

Disabling the 'Multidisciplinary Team Added' Transaction

The application property for disabling the **Multidisciplinary Team Added** transaction can include the following sample values:

*Table 8. Sample Application Property for Disabling **Multidisciplinary Team Added** Transaction*	
Field on Add Property Page	**Sample Value**
Property Name	curam.config.transaction.disable.SEFET109
Value	YES
Category	Application - Case Transaction Log settings
Type	String Type
Dynamic	Yes
Default Value	(Not required)
Locale	English, Spanish, etc.
Display Name	curam.config.transaction.disable.SETET109

*Table 8. Sample Application Property for Disabling **Multidisciplinary Team Added** Transaction (continued)*

Field on Add Property Page	Sample Value
Description	Whether to disable the 'Multidisciplinary Team Added' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team is added to the social enterprise folder (SEF).

Disabling the 'Multidisciplinary Team Removed' Transaction

The application property for disabling the **Multidisciplinary Team Removed** transaction can include the following sample values:

*Table 9. Sample Application Property for Disabling **Multidisciplinary Team Removed** Transaction*

Field on Add Property Page	Sample Value
Property Name	curam.config.transaction.disable.SEFET110
Value	YES
Category	Application - Case Transaction Log settings
Type	String Type
Dynamic	Yes
Default Value	(Not required)
Locale	English, Spanish, etc.
Display Name	curam.config.transaction.disable.SETET110
Description	Whether to disable the 'Multidisciplinary Team Removed' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team is removed from the social enterprise folder.

Disabling the Multidisciplinary Team Member Added Transaction

The application property for disabling the **Multidisciplinary Team Member Added** transaction can include the following sample values:

*Table 10. Sample Application Property for Disabling **Multidisciplinary Team Member Added** Transaction*

Field on Add Property Page	Sample Value
Property Name	curam.config.transaction.disable.SEFET107
Value	YES
Category	Application - Case Transaction Log settings
Type	String Type
Dynamic	Yes
Default Value	(Not required)
Locale	English, Spanish, etc.
Display Name	curam.config.transaction.disable.SETET107

*Table 10. Sample Application Property for Disabling **Multidisciplinary Team Member Added** Transaction (continued)*	
Field on Add Property Page	**Sample Value**
Description	Whether to disable the 'Multidisciplinary Team Member Added' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team member is added to the social enterprise folder.

Disabling the Multidisciplinary Team Member Removed Transaction

The application property for disabling the **Multidisciplinary Team Member Removed** transaction can include the following sample values:

*Table 11. Sample Application Property for Disabling **Multidisciplinary Team Member Removed** Transaction*

Field on Add Property Page	Sample Value
Property Name	curam.config.transaction.disabled.SEFET108
Value	YES
Category	Application - Case Transaction Log settings
Type	String Type
Dynamic	Yes
Default Value	(Not required)
Locale	English, Spanish, etc.
Display Name	curam.config.transaction.disable.SETET108
Description	Whether to disable the 'Multidisciplinary Team Member Removed' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team member is removed from the social enterprise folder (SEF).

Summary of SEF and MDT Configuration Options

A summary of the social enterprise folder and multidisciplinary team application properties.

Table 12. Summary of SEF and MDT Application Properties

Application Property	Summary
curam.ise.sef.casetypes.allowall	This indicates whether or not all case types are supported in social enterprise folders. The default is 'NO'.
curam.ise.sef.casetypes	This indicates the specific case types that are supported in social enterprise folders. The default is 'CT2,CT5', the codes for product delivery and integrated case types.
curam.ise.sef.client.createrelationship	This is used to configure automatic creation of social enterprise folder relationships when new clients are added to a social enterprise folder. The default value is 'YES'.

Table 12. Summary of SEF and MDT Application Properties (continued)

Application Property	Summary
curam.ise.send.mdtmembers.notifications	This indicates whether or not to send notifications to multidisciplinary team members, for example, when a member is invited to a meeting. The default value is 'YES'.
curam.mdtexternal.numDaysTasksToDisplay WorkspaceHome	This indicates the maximum number of days following the current date for which tasks assigned to the multidisciplinary team member are displayed on the member's portal home page. The default value for this is 7.
curam.mdtexternal.numDaysMeetingsTo DisplayWorkspaceHome	This indicates the maximum number of days following the current date for which meetings the multidisciplinary team member is scheduled to attend are displayed on the member's portal home page. The default value is 7.
curam.mdtexternal.numMeetingMinutesTo DisplayWorkspaceHome	This indicates the maximum number of meeting minutes to display on an MDT member's portal home page. The default value is 5.
curam.mdtexternal.numDaysTasksTo DisplayMyTasks	This indicates the maximum number of days following the current date for which tasks assigned to the MDT member are displayed on the member's My Tasks page. The default value is 30.
curam.mdtexternal.starUnmanagedClients OnIncidents	This property controls whether or not those clients are starred out so that MDT members can only see information about their own clients. The default value is 'YES'.

Summary of Discussion Configuration Options

A summary of the discussion application properties.

The following table provides a summary of the discussion application properties.

Table 13. Summary of Discussion Application Properties

Application Property	Summary
curam.ise.sef.userDefinedModerator	This is used to configure the default type of discussion moderator. The default value is CASEOWNER which means that the moderator of all discussions in a social enterprise folder, outcome plan and investigation is the caseowner. If this property is set to USERDEFINED, then the username must be configured in the next application property, curam.ise.sef.discussionsModerator .
curam.ise.sef.discussionsModerator	This is used to specify a user at the default moderator for discussions on outcome plan and investigation. It is set in conjunction with the above application property, curam.ise.sef.userDefinedModerator , when set to USERDEFINED.

Table 13. Summary of Discussion Application Properties (continued)

Application Property	Summary
curam.ise.discussion.paginate	This determines whether or not discussions will be paginated. The default is 'YES'.
curam.ise.discussion.commentsPerPage	This determines how many comments to show per page on the paginated discussions widget. The default is '5'.
curam.ise.discussion.viewURL	This specifies the address of Discussion view page. It is used when sending links to Cúram pages in email notifications. The default is Discussion_viewDiscussion.
curam.discussion.stopWatching	This specifies the address of stop watching discussion page. It is used when sending links to Cúram pages in email notifications. The default is Discussion_stopWatchingFromEmail.
curam.discussion.sendEmailNotifications	This specifies whether or not email notifications should be sent to watchers when discussion updates occur. The default is NO.

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