

# Worldgroup Manager User's Guide

## Contents



Existing Users

|  |    |
|--|----|
| Configuring existing Worldgroup Manager Software for use with new BBS. | 1  |
| New Installation via CD  | 4  |
| Connect with WPS EDI BBS   | 10 |
| Logoff   | 13 |
| WPS EDI BBS Main Menu  | 15 |
| Upload Files   | 18 |
| Download Files   | 20 |
| Your Account   | 22 |
| Email  | 23 |
| File Libraries   | 25 |



New Users

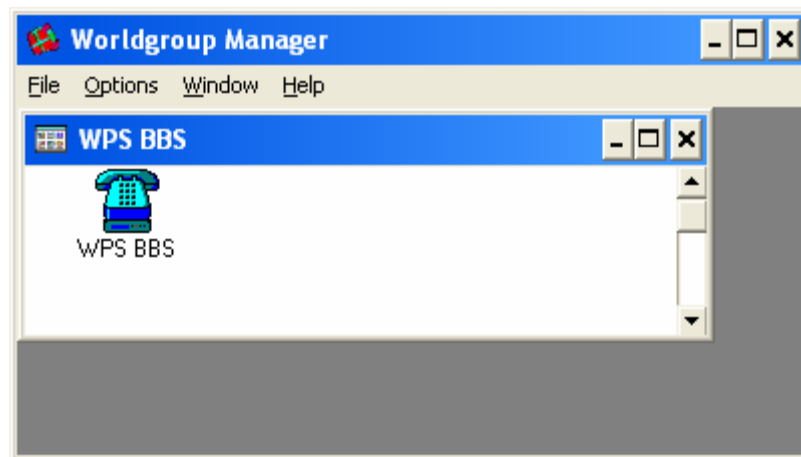
# Worldgroup Manager

## Configuring Existing Software for Use with New WPS BBS

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If you are already submitting files using Worldgroup Manager, the following steps will guide you through the process to use your existing software to submit to the new WPS BBS.

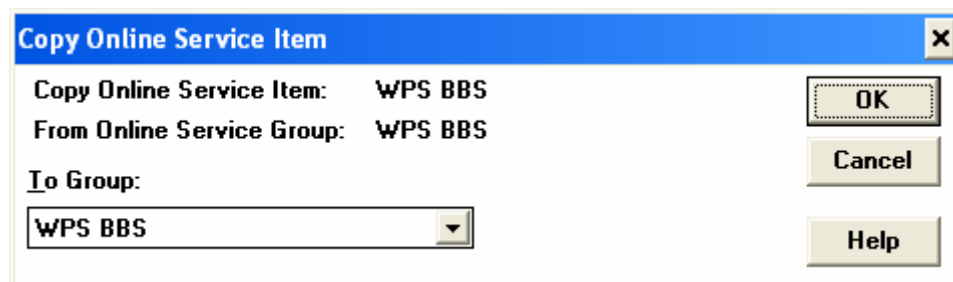
Step 1: Start your Worldgroup Manager software. You'll see a screen similar to this:



Step 2: Select (don't double-click) the icon that represents your connection to the WPS BBS. In the example above, it is this:



Step 3: Once selected, select File → Copy from the menu. You'll be prompted with this screen:



Click 'OK'. A new icon will appear next to your old icon. This icon represents a copy of your existing WPS BBS connection.

Step 4: Select the new icon. Once selected, select File → Properties from the menu. You'll be prompted with a screen similar to this:

The screenshot shows the 'Online Service Properties' dialog box. The title bar is blue with the text 'Online Service Properties' and a close button. The dialog is divided into several sections:

- Name:** A text box contains 'WPS WG'. To the right is an 'OK' button.
- When to connect:** Two radio buttons are present. The first, 'Always connect upon invoking this service', is selected. The second is 'Run offline until "Connect" button is pressed'. To the right are 'Cancel' and 'Help' buttons.
- How to connect:** Four radio buttons are present: 'Telnet', 'Modem' (selected), 'Serial', and 'Novell LAN'. A 'Phone #' text box contains '9, 608-287-1581'. A 'Settings...' button is to the right.
- How to log on:** A 'Log on as new user' checkbox is unchecked. Below it are 'User-ID:' and 'Password:' text boxes. An 'Advanced...' button is at the bottom right.

Two things should be changed.

- Name: should reflect what you are connecting to. If you are already submitting files to WPS, you could use "New WPS BBS".
- The phone number used to connect is **608-287-1581**
  - If you are local to Madison, WI, you should **not** include the area code in the Phone # Field.
  - If your office requires you to dial a number or code to get to an out-side line, enter that number and then a comma (,) before entering the rest of the phone number. In the example above, the user needs to dial a '9' to get an outside line. The comma tells the modem to wait briefly before dialing the rest of the phone number. This ensures that the line has been established before dialing continues.

Once these changes have been made, click 'OK'.

Step 5: You should now see two icons. Double-clicking the new icon will connect you to WPS's new Worldgroup server. Once connected, you'll be asked for your User ID and Password. From there, the software will automatically update itself to the current version of Worldgroup.

For more information about the BBS, please see continue to the “Connect with WPS EDI BBS” section of this document.

# Worldgroup Manager Installation – From CD ROM Windows™ 95/98/NT/2000/XP/VISTA

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Windows XP

**Note:** If you are installing on **Windows XP** or **VISTA**, please follow these steps. When finished, you'll need to follow the steps at the end of this document to install and configure a compatibility tool to allow Worldgroup to function in this environment.

- Step 1: Insert the WPS Claims Express/Worldgroup Manager installation CD into your CD – ROM drive.
- Step 2: Click 'START' then 'RUN'. Type **D:\WG\SETUP.EXE** in the field labeled 'open' (or E:\WG\SETUP.EXE if the CD is inserted in your PC's E drive).



Click on

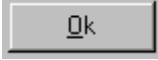


Initialization files will be copied.

- Step 3: A prompt for the installation location will now appear on your monitor ("Where do you wish to install World Group Manager?"). The default directory (path) of **C:\WGMAN** will be present. Click on "OK" if this is where you wish to install the software on your system. If you wish to install the software on a different drive or in a different directory, key the path you wish to use and click on "OK".

**WARNING:** ***WPS Electronic Data Services strongly suggests you click on "OK" to accept the default directory.***

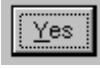
The software installation will now begin.

Step 4: You will receive an explanation of the "World Group Plug-in Installation" to launch a Netscape-compliant plug-in program. Read this explanation and click on .


**NOTE:** This is an Internet extension of Worldgroup Manager. This additional feature is not utilized by WPS.

Step 5: The World Group Manager installation program will now search your system for the Netscape Navigator software. Another explanation of the plug-in program process will appear. You can select either of the three alternatives that appear ("Cancel", "OK", or "Skip") depending on what you prefer to do.

**NOTE:** If you do not have Netscape Navigator software on your system, click on "Cancel".

Step 6: A message indicating that the Worldgroup Manager installation is complete will now appear on your monitor. You will also be asked if you wish to view a README file. *WPS Electronic Data Services suggests you view this file for additional information regarding World Group Manager.* To view the file, click on .

Once you have viewed the README file, you can click on "File" then "Exit" to exit the file.

Step 7: If you are prompted to restart Windows, click  to indicate that this is what you wish to do. If you are not prompted, it is still best to exit out of all applications and restart Windows before accessing Worldgroup Manager.

## Configuration of Worldgroup Manager (Online Service Properties)

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Once Worldgroup Manager has been installed, complete the following steps to configure the software to interact correctly with your modem.

Step 1: Access Worldgroup Manager by double clicking on the 'Worldgroup Manager' icon that was created by the installation program.

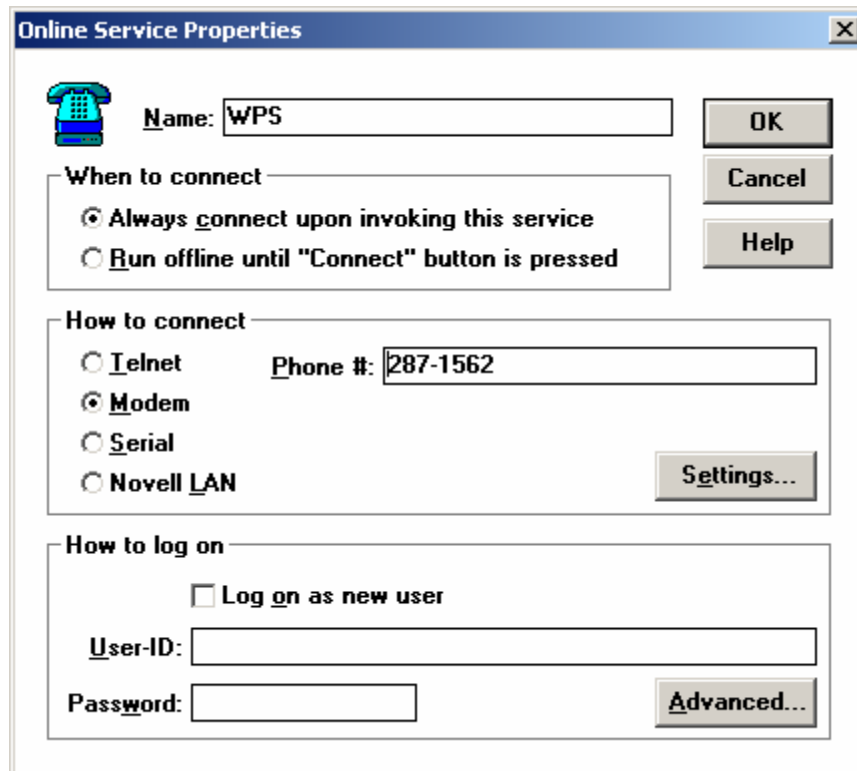
Note: You can copy or drag this icon to your desktop for convenient access to Worldgroup Manager.

An icon group (window) labeled 'Worldgroup Manager' will appear.


A 'WPS' icon should appear in this window.



Step 2: Click on 'File' and select 'Properties' from the menu that appears. An 'Online Service Properties' window will appear.



**Online Service Properties**

 Name:

**When to connect**

Always connect upon invoking this service

Run offline until "Connect" button is pressed

**How to connect**

Telnet Phone #:

Modem

Serial

Novell LAN

**How to log on**

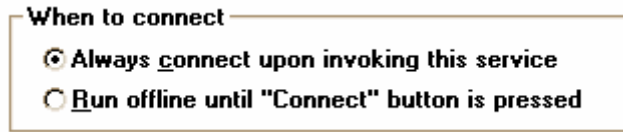
Log on as new user

User-ID:

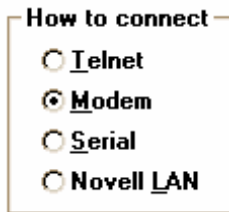
Password:

Buttons: OK, Cancel, Help, Settings..., Advanced...

Step 3: Indicate 'When to connect' by clicking once in the circle corresponding to the option you wish to use.



Step 4: Indicate 'How to Connect'. Select 'Modem' by clicking once in the appropriate circle.




Step 5: Verify the telephone number that appears once 'Modem' is selected. The correct telephone number is:

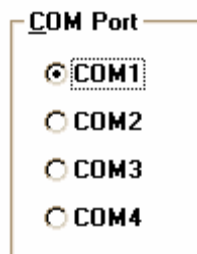
**608-287-1581**

Note: Add a '1' and '608' to the phone number if it is a long distance call to Madison, Wisconsin. A comma (,) after the '1' will cause a pause when the modem is being dialed.

Note: Many telephone systems require a '9' or some other special character(s) to access an outside or long distance line. Add these characters to the beginning or end of the phone number (whichever is applicable). Keep in mind that a comma (,) causes a pause when the modem is dialing.

Step 6: After the telephone number has been verified and modified (if necessary), click on  to bring up the 'Modem Settings' window.

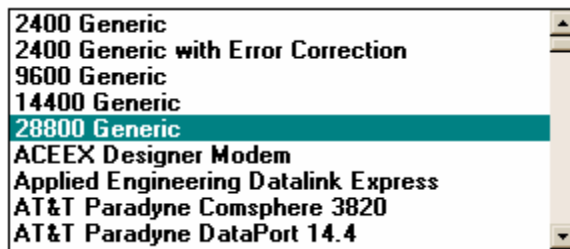
Step 7: Select the appropriate 'COM Port' for your modem.




Note: The 'COM Port' is the communication port through which your modem is connected to your system. If you do not know which COM Port is correct, consult your system user materials or contact your hardware vendor.

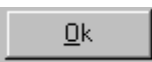
Note: Internal modem cards are not actually plugged into a COM Port but act as if they are.

Step 8: Select the brand and model of modem you are using from the list that appears. Use the vertical scroll bar to locate your modem from the list. Click on your selection to highlight it.



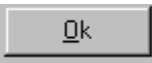
Note: If your exact modem brand/model does not appear on the list provided, select one that is a near equivalent. You may need to click on 'Options' to modify various settings for your needs. *If you are unsure, click on 'Help' for assistance.*

Step 9: Click on  and select the appropriate baud rate for your modem (if it is not already indicated) from the 'Modem Setting Options' window.

Click on  to save your selection and return to the 'Modem Settings' window.

Note: If your modem's exact baud rate does not appear on the list of possible rates, select the next higher value.

Note: There is normally no reason to modify the 'Dial Mode' or 'Init String' sections of the 'Modem Setting Options' window.

Step 10: Click on  to save your selections and return to the 'Online Service Properties' window.

Step 11: Indicate 'How to log on'.

**How to log on**

Log on as new user

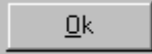
User-ID:

Password:

- a. Since WPS has already added you as a user of the WPS EDI BBS, make sure there is not an 'x' in the field labeled 'Log on as a new user'. If there is an 'x' in this field, click once in the field to remove it.
- b. Click once in the 'User-ID' field and type the User ID (Submitter Number) assigned to you by WPS EDI.
- c. Click once in the 'Password' field and type the password assigned to you by WPS EDI.

Note: Steps b and c are optional. If left blank, you will be prompted when you connect.

Note: Your password will always appear as \*'s on your monitor for your data protection.

Step 12: After you have completed the 'Online Service Properties', click on  to save your selections and return to the 'Worldgroup Manager' window.

## Connect with the WPS EDI BBS

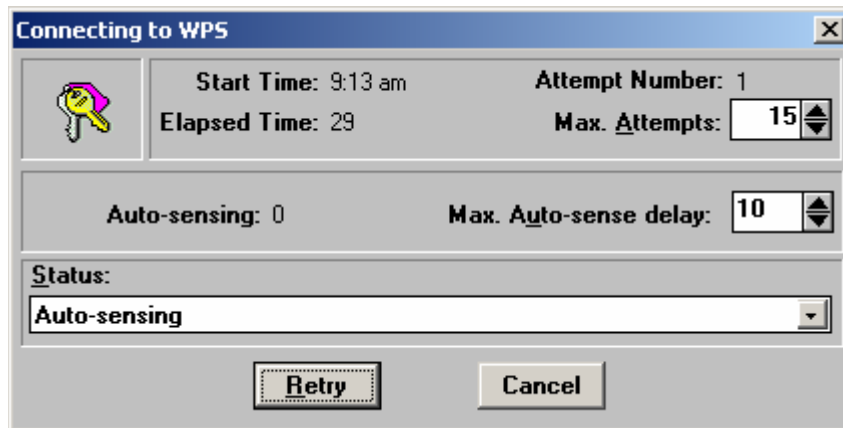
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Once the Worldgroup Manager software has been installed and configured for your modem, you can access the WPS EDI BBS. Complete the following steps to dial in and log on.

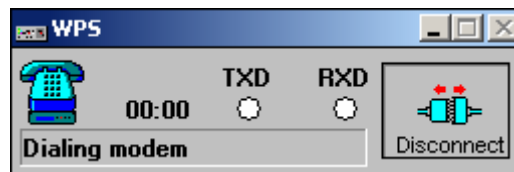
Step 1: Double click on the Worldgroup Manager icon. The 'Worldgroup Manager' window containing the WPS icon will appear.



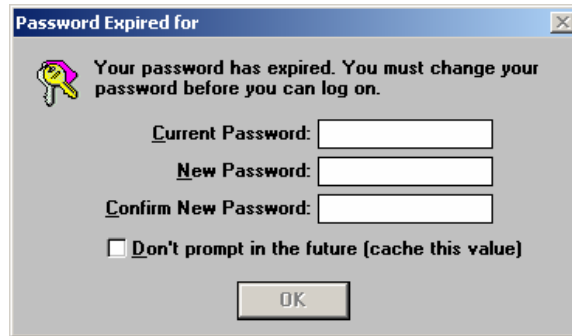
Step 2: Double click on the WPS icon. A window labeled 'Connecting to WPS' will appear.



A second, smaller window, allowing you to view the status of the connection will also appear in the upper right corner of your monitor screen.



Step 3: Once the connection is made, the first time you log in, you will be forced to change your password.



- Type the temporary password you were given by WPS EDI staff in the 'Current Password' field.
- Type a new password in the 'New Password' field.
- Retype your new password in the 'Confirm New Password' field.

### **WPS EDI PASSWORD POLICIES**

To meet WPS corporate and federal security mandates, the following password policies are in place:

1. All passwords must be at least 8 characters.
2. All passwords must contain at least one UPPER CASE letter.
3. All passwords must contain at least one lower case letter.
4. All passwords must contain at least one number.
5. All passwords must contain at least one special character (i.e. #, \$, @, &)
6. Passwords will expire after 90 days. You must change your password before it expires.
7. Passwords cannot be changed more than one time within a 24 hour period.
8. 24 passwords are 'remembered' and cannot be reused until 24 others have been utilized.

Step 4: Once you have changed your password (if required) you will be logged onto the WPS EDI BBS, a window labeled 'WPS Electronic Data Services – WPS EDI Main Menu' will appear.

The 'WPS EDI Main Menu' will contain the following icons:



Upload Files



Download Files



Your Account



EMAIL



Get Support Files



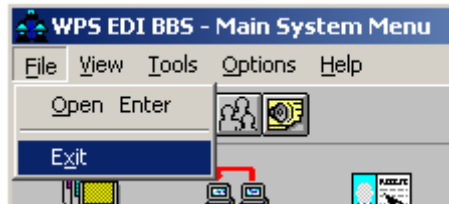
EDI File Libraries

Note: After connecting to the WPS EDI BBS; icons, system files, and file libraries will be automatically updated. This process will occur on a regular basis as modifications are made to the WPS BBS.

## Logoff Procedure

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When you have finished using the WPS EDI BBS, return to the 'WPS EDI Main Menu'. To logoff, click on 'File' and select 'Exit' from the drop-down menu that appears. Your connection will be terminated.



# WPS EDI BBS Main Menu

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Once you have connected to the WPS EDI BBS, the 'WPS EDI Main Menu' window will appear. This menu contains icons for use of the WPS EDI BBS features. Brief explanations of these icons follow.

When using Worldgroup Manager to utilize the WPS EDI BBS, keep the following in mind:

- If you are unsure of the steps to follow for uploading files, downloading files, etc., use the 'Help' function that can be accessed by clicking on 'Help'. This resource contains extensive explanations of procedures and instructions for performing the various functions that are available.
- When you point to icons, descriptions will appear to assist you in determining appropriate icons to use for various procedures.

The following is a brief introduction to some of the different features. More detailed information will follow this introduction.

## Upload Files



Double click this icon to access an icon group containing the following:




Upload PRODUCTION Files



Upload TEST Files



Upload PRINT IMAGE Files

- The icons that appear in this group will vary from user to user depending on access assigned by WPS EDI staff.
- Click on  from the toolbar while in this icon group to return to the previous menu (WPS EDI Main Menu).

## Download Files

Double click this icon to access your Private Download Library to locate and download files that have been posted for you by WPS.

## Your Account

Double click this icon to access and update your BBS account information. The WPS EDI department asks that all users access their account information to ensure that it is correct and current.

Access you account information on a regular basis to change the password for the WPS EDI BBS. **Passwords will expire and have to be changed after 90 days.** Changing the password for the WPS EDI BBS helps protect the integrity of sensitive electronic data that is transferred between the user and WPS.

## EMAIL

Double click this icon to send email messages to WPS EDI staff and receive email messages sent to you.

If there is new email in your mailbox when you log on, you will be notified by the appearance of an announcement immediately after logging on to the WPS EDI BBS.

Note: When you change the password in the WPS BBS account information, do not forget to make the same change in the configuration of Worldgroup Manager before making your next connection with the WPS BBS.



### **Get Support Files**

Double click this icon to access any support files that are available for you to download.

## **File Libraries**



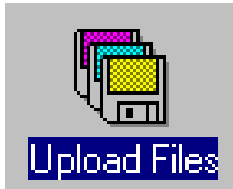
File Libraries are directories containing programs, files and documents that WPS EDI BBS users can download and print or otherwise use.

Most of the documents that will be available in the File Libraries are created in Microsoft Word. You must have the appropriate software (or word processing software that is capable of converting documents created in Microsoft Word) in order to view or print those documents.

# Using the WPS EDI BBS via Worldgroup Manager

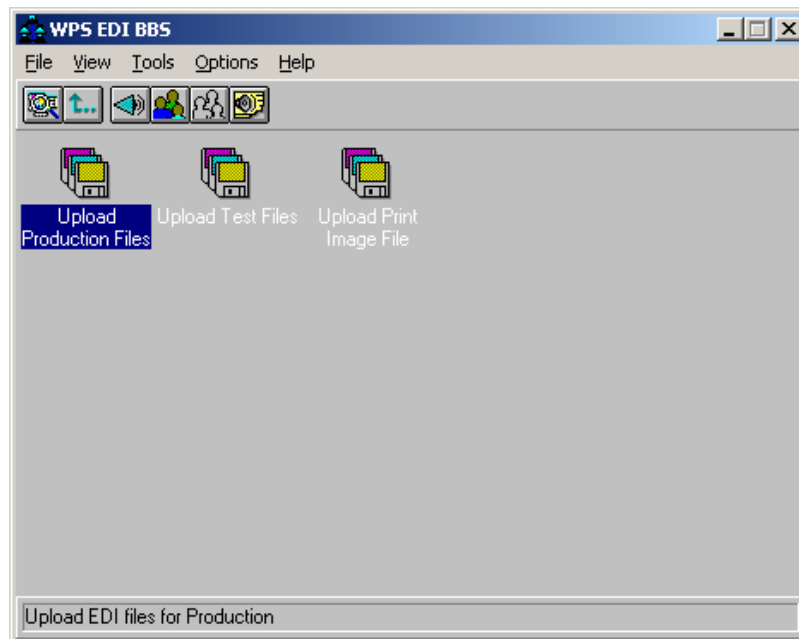
## Upload Files

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This option from the WPS EDI BBS Main Menu is used to transmit your data to WPS. Whenever you upload a file to the WPS EDI BBS, you are actually placing a file in one of the file libraries. The library in which your file is placed depends on which of the upload options you select from the WPS EDI BBS Upload Menu.

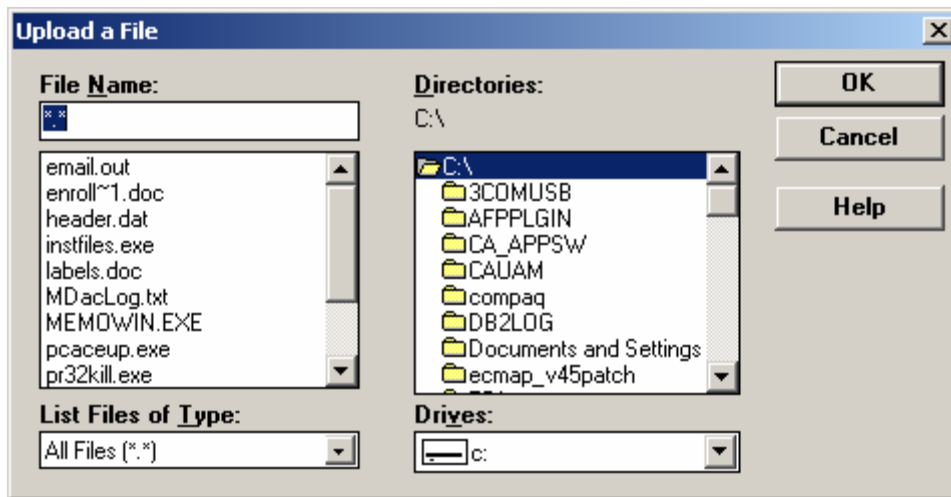
Step 1: Double click on the 'Upload Files' icon. A new icon group will now appear.

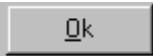




Note: Not all users will have access to all three options from this menu. Access to the 'Production Files' and 'Print Image Files' options are provided by WPS EDI staff.

Step 2: Double click on the icon representing the type of file you wish to transmit to WPS ('Test Files', 'Production Files' or 'Print Image Files'). The

appropriate file library will be accessed and a directory window labeled 'Upload a File' will appear.



- Step 3: Select the drive and directory (folder) where your file is located.
- Step 4: Click on the file you wish to transmit to WPS. It will now appear in the field labeled 'File Name'.
- Step 5: Click on  to transmit your file to the WPS BBS. You can view the progress of the file transfer in the upper right corner of your monitor.
- Step 6: Once the file transfer has been completed, click on  to exit out of the File Libraries and return to the WPS EDI Upload Menu. Click on  to return to the WPS EDI Main Menu.

## Download Files

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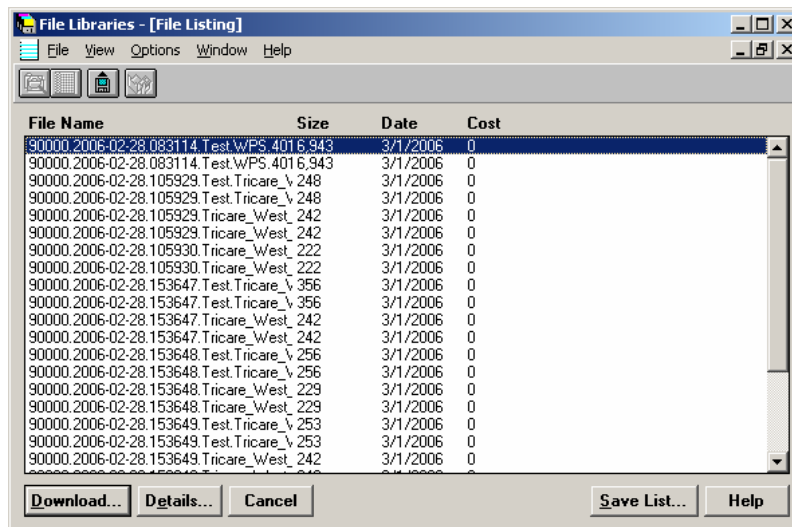



After your claim file is uploaded, it is run through an initial edit check that verifies that the file format is correct and acceptable. The results of this edit check are posted to a private Download library in the form of a text file (for you to download and view/print) shortly after the file transfer has been completed.

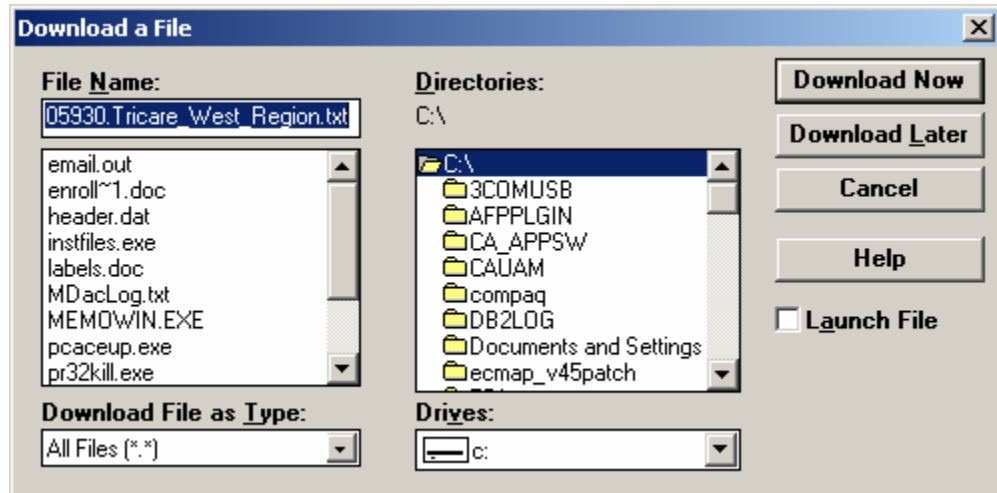
Reports (that indicate any rejected claims), 997 acknowledgement transactions, ASC X12 835 remittance transactions, etc. are also posted to your Private Download Library for your access.

To download files from your private Download library:

Step 1: Double click the 'Download Files' icon. You will be directed to your private Download library and a list of available files will appear.



Step 2: Click on the file you wish to download and click on . A directory box labeled 'Download a File' will appear.



Step 3: Select the drive and directory (folder) where you wish to place the file in your system.

**Note:** This step is very important. You need to know where the downloaded file is placed in your system to access and use after the file transfer is complete.

Step 4: Click on **Download Now**. The file transfer will now begin. The progress of the file transfer can be viewed in the upper right corner of your monitor.

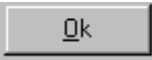
**Note:** Once files have been downloaded, they will be removed from your main private file library and archived to your private Downloaded File Archive library where they can be accessed for 30 days. Refer to the 'File Libraries' section of this document for instructions to locate your Downloaded File Archive library.

Step 5: Locate the downloaded file in your system. If the file is an accept/reject report or a text file, open it in Notepad, Wordpad or any word processing software to view and print it. If the downloaded file is an electronic remittance file, prepare it to be run through your software that allows you to utilize such files.


## Your Account

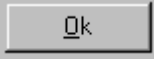
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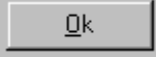


Double click on the 'Your Account' icon from the WPS EDI Main Menu to display information regarding your account on the WPS EDI BBS. You can modify any of the information that is displayed on your account. Click on  to save any changes you make.

To change your password for the WPS BBS:

Step 1: Access your account information and click on .

Step 2: Type your current password and the new password in the appropriate fields and click on .

Step 3: You will be prompted to re-enter the new password for verification. Type the new password again and click on .

Note: You should change your password on a regular basis to protect your data. All passwords will expire after 90 days.

### WPS EDI PASSWORD POLICIES

To meet WPS corporate and federal security mandates, the following password policies are in place:

1. All passwords must be at least 8 characters.
2. All passwords must contain at least one UPPER CASE letter.
3. All passwords must contain at least one lower case letter.
4. All passwords must contain at least one number.
5. All passwords must contain at least one special character (i.e. #, \$, @, &)
6. Passwords will expire after 90 days. You must change your password before it expires.
7. Passwords cannot be changed more than one time within a 24 hour period.
8. 24 passwords are 'remembered' and cannot be reused until 24 others have been utilized.

# EMAIL


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The Email function allows you to send email messages to WPS EDI staff and read email messages that have been sent to you.

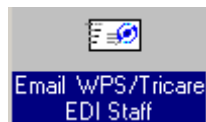
**IMPORTANT NOTE: WPS no longer uses the email function to send initial edit results or attach reports and other files for download.**

To send an email message:

Step 1: Double click on  from the WPS EDI Main Menu. The Email icon group will be accessed.

**\*\*The following selections may be updated in the future to reflect additional WPS EDI area's to send emails to\*\***

Step 2: Double click on . An icon group containing the following selections will appear:



Send email to the WPS EDI Helpdesk for assistance with WPS Commercial Insurance, WPS Tricare and Epic Life Insurance.



Send email to WPS EDI staff for assistance with Illinois, Michigan and Wisconsin Medicare Part B




Send email to WPS EDI staff for assistance with Minnesota Medicare Part B

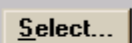
Step 3: Double click on the icon representing the WPS EDI area to which you wish to send email. A window labeled 'Write Message' will appear. The 'To' field will contain the account assigned to the WPS EDI area you selected.

Step 4: Click once in the 'Topic' field and type the topic of your message.

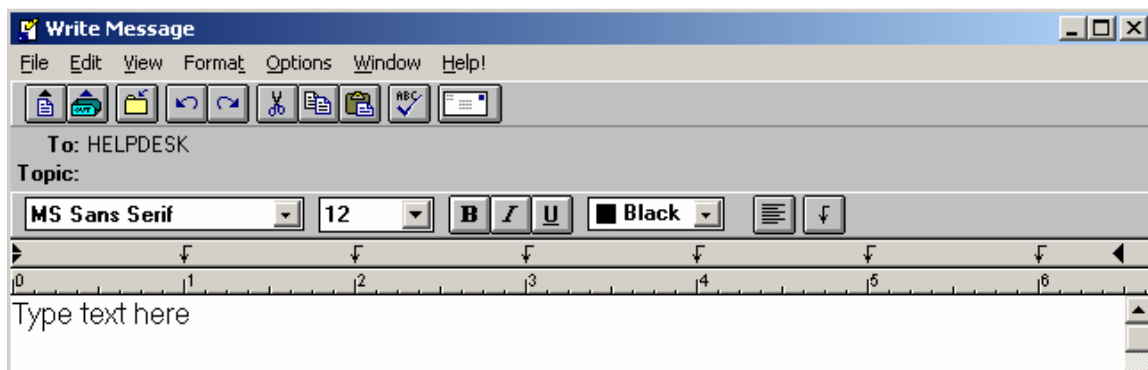
Topic:


Step 5: (Optional) If you wish to attach a file to your message, click on  and browse your system to locate the file in the appropriate drive and directory.

Note: You can type the drive and directory in the 'Path' field and the file name in the 'Name' field without browsing for the file you wish to attach to the email message.

Attachment  
Path:    
Name:   File is on server  Make a copy

Step 6: Click on . You will now be able to type your message.



Step 7: Once you have completed your message, click on  to send your message. You will receive verification that the message was sent.

# File Libraries


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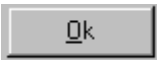



File Libraries are directories containing files WPS BBS users can download to their systems.


To browse EDI File Libraries and download files:

Step 1: Double click on the 'EDI File Libraries' icon from the WPS EDI Main Menu.

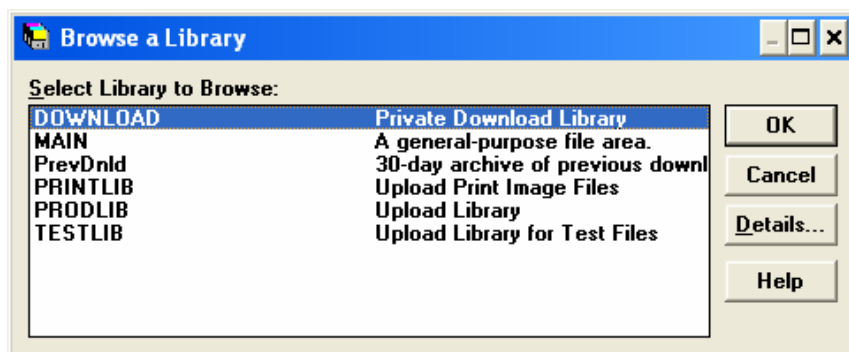
Step 2: Click on  to view a list of the EDI File Libraries that are available to you.

Step 3: Click once on the library you wish to browse to highlight it and click on .

Step 4: Click once on the file you wish to download and click on . You will need to indicate the drive and directory where you wish to save the downloaded file.

Note: Click on  to view a description of the file prior to downloading.

Some of the sample libraries that may see are listed here. Read on to take particular note of the PrevDnld library.



The **Download** and **PrevDnld** libraries are specific to your account. The **Download** library is the same library you'll see when you follow the instructions above for downloading files. The **PrevDnld** library is essentially a 30-day backup library to your **Download** library. Once files are downloaded from your Download library, the downloaded file is moved to the PrevDnld library. If you need to re-download a file, look here first! .

The **Main** library is where you'll find general EDI information or programs. This is a download only library

Finally, the **PRINTLIB**, **PRODLIB**, and **TESTLIB** libraries are the libraries you upload to when you follow the instructions above for uploading files. These are upload only libraries.

# Using Worldgroup Manager on WindowsXP, Windows 2003 or Windows Vista

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## PROBLEM

Worldgroup Manager may not run under WinXP, Windows 2003 and Windows Vista. To correct this you will need to use Microsoft's "Application Compatibility Toolkit, version 5.0" or higher.

## RESOLUTION

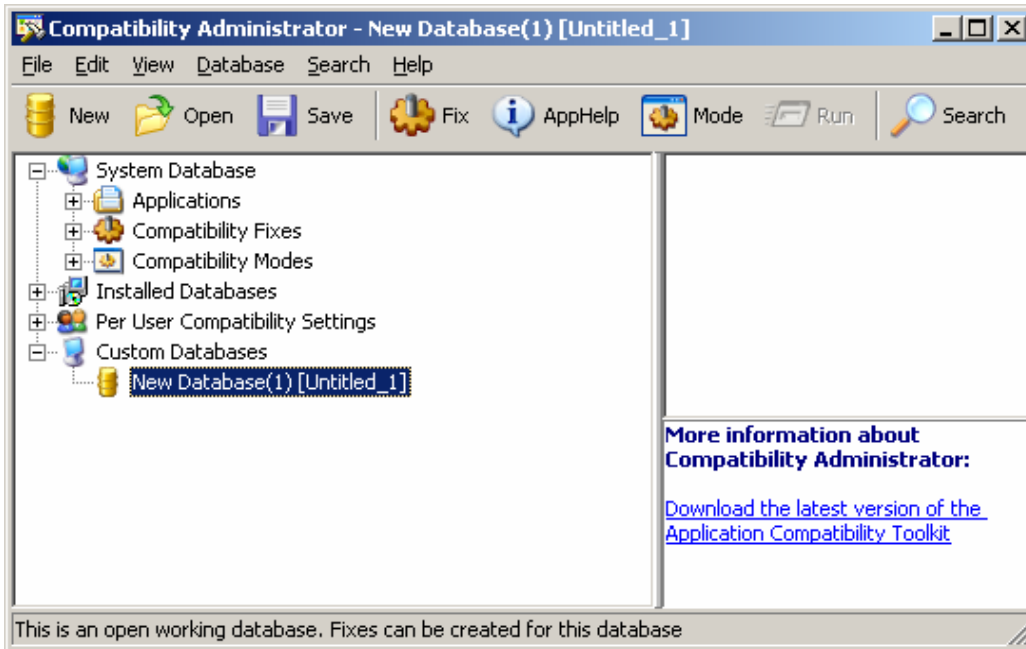
1. You can download the Application Compatibility Toolkit from Microsoft's web site by going directly to <http://www.microsoft.com/downloads/results.aspx?poclid=&freetext=application%20compatibility%20toolkit&DisplayLang=en>
  - a. Or you can go to Microsoft's site and search for the words "Application Compatibility Toolkit".

2. Download the toolkit to your computer. The filename is Microsoft Application Compatibility Toolkit.msi. Run this file to install it. Simply follow the prompts and install everything.

Note: Before download you will be required to validate that you are a Windows user – Click "Continue" when you initially reach the download page. You will then be able to download the file.

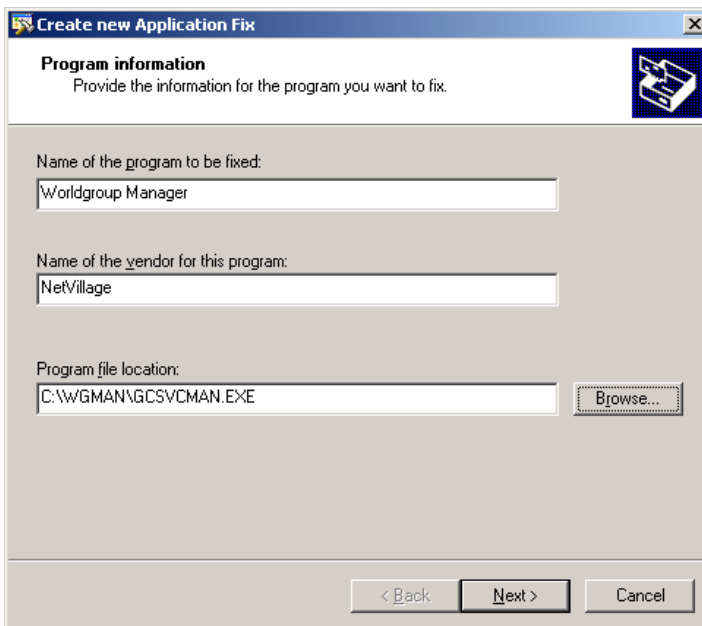
Note: Click on "Instructions" for additional assistance when on Microsoft's download page.

3. Start the Compatibility Administrator Tool by clicking on **Start / Programs / Microsoft Windows Application Compatibility Toolkit/ Tools/ Compatibility Administrator.**
4. You'll see the following screen



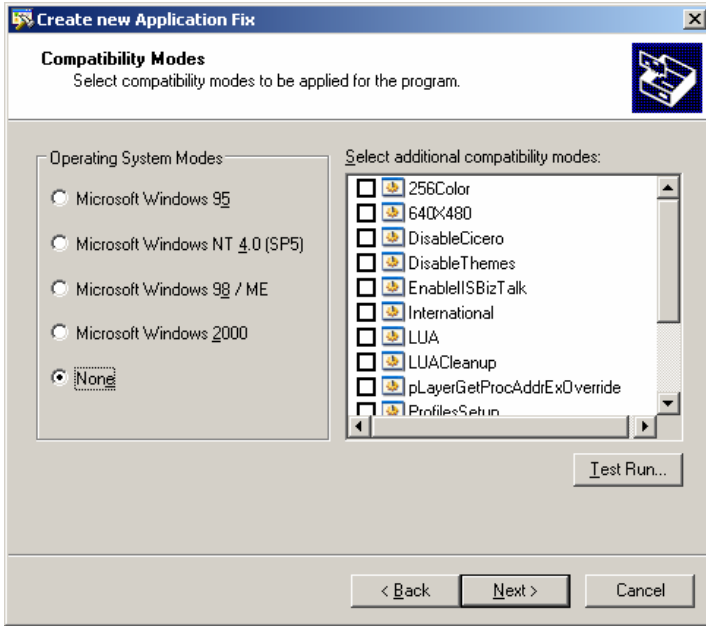
Click Database menu tab, then choose “Create New”, “Application Fix...”

5. Fill out the Program Information dialog box as below

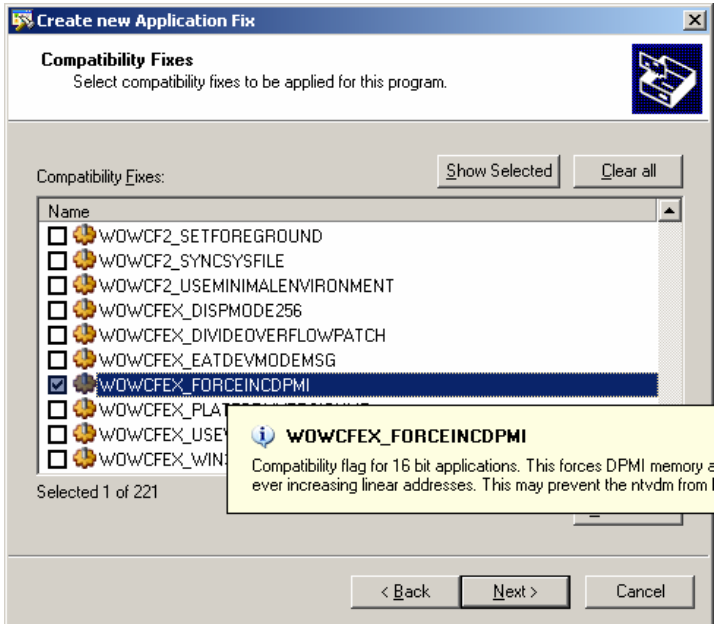


The Program File Location should be the path to the GCSVCMAN.EXE where you installed Worldgroup Manager, generally c:\wgman\GCSVCMAN.EXE. Enter the above information and Click Next

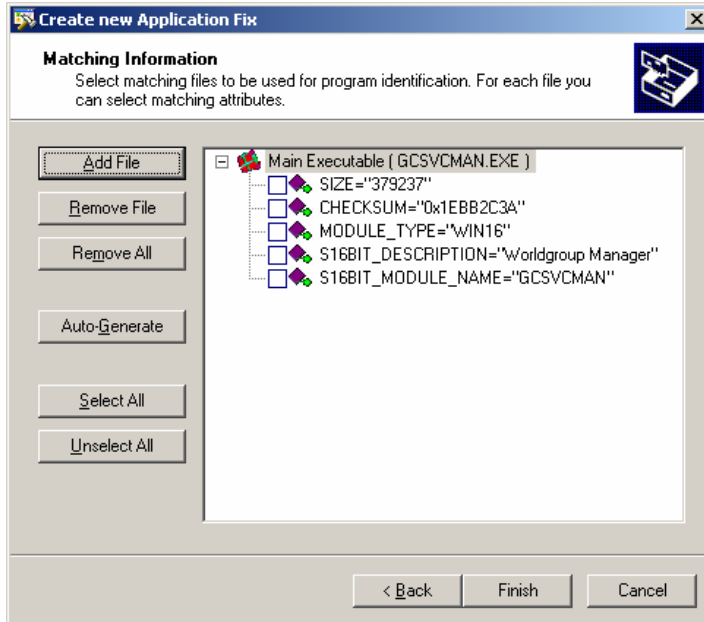
6. In the “Compatibility Modes” screen, you don’t need to set anything, simply choose None and click Next.



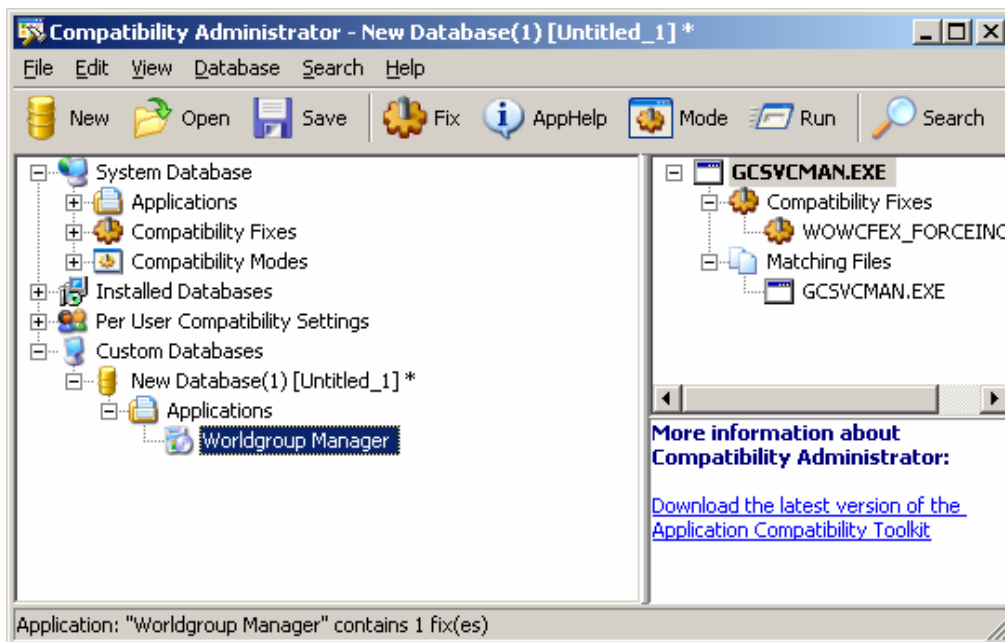
7. The “Compatibility Fixes” screen is where you’ll make the fix. Scroll down until you see WOWCFEX\_FORCEINCDPMI and click on that to select it. Click Next.



8. You don't need to do anything at the "Matching Information" screen. Click Finish.

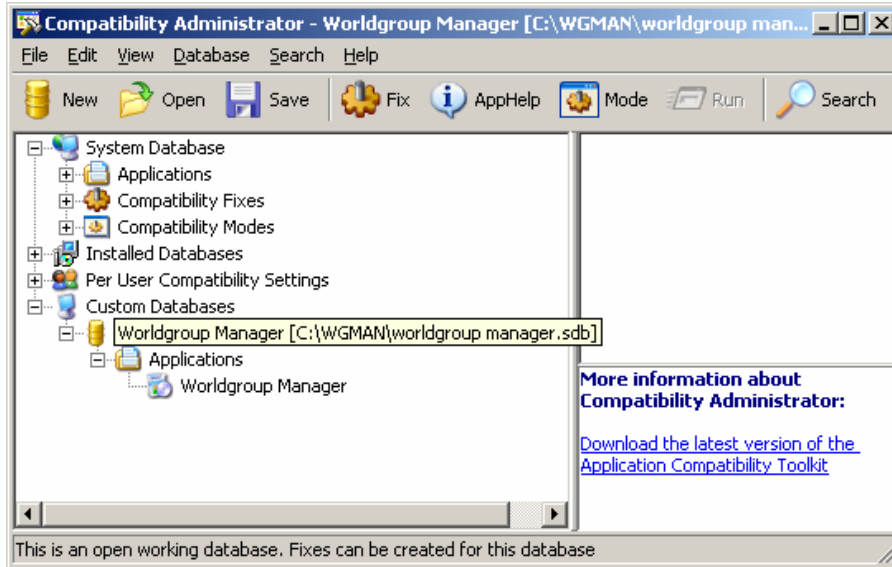


9. You'll be taken back to the Administrator Screen where you are going to need to first save the database, then install it.

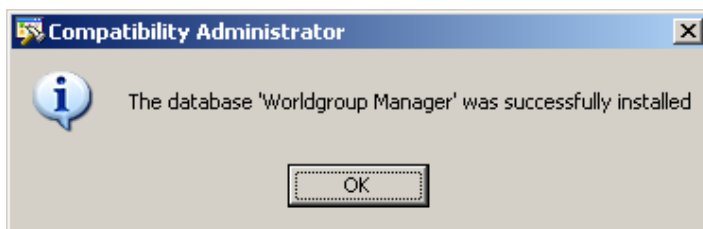


Highlight the new database and click Save. Call the database name "Worldgroup Manager" and save the "Worldgroup Manager.sdb" in the \wgman directory.

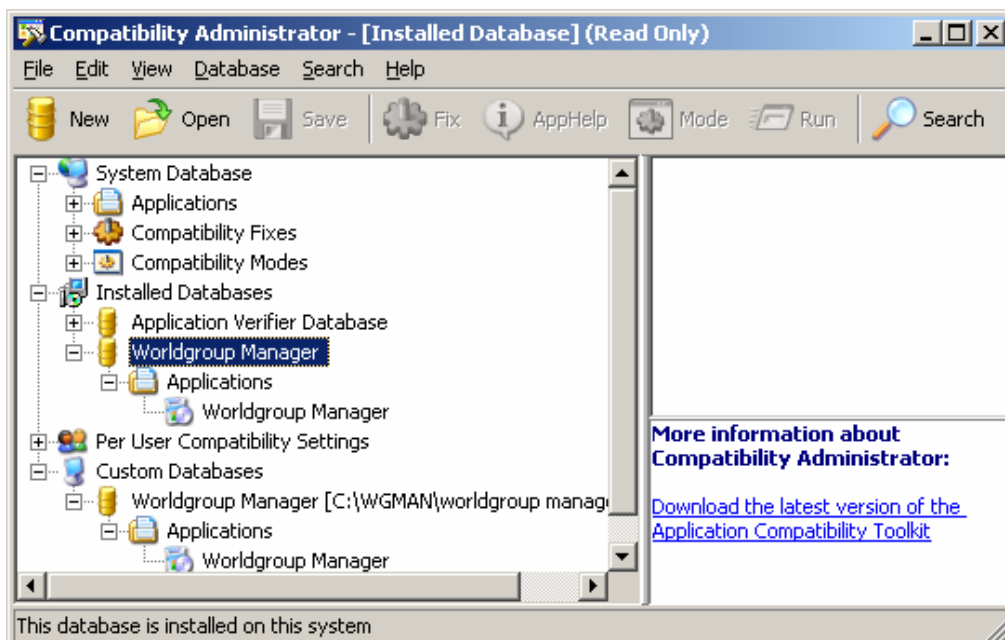
10. After you have saved the database, RIGHT-click on it and choose “Install”.



You should see



And the fix will be stored under the “Installed Databases” section as shown below.



11. At this point you may not be able to run Worldgroup Manager without any instabilities. We have had some customers require applying the patch to one other of our applications, the Worldgroup Manager Main Menu app (GCSMM204.EXE). You can do this by repeating steps 4 through 10 but point it to the program c:\wgman\WGSMAINM\GCSMM204.EXE as shown in the screen below:

**Create new Application Fix**

**Program information**  
Provide the information for the program you want to fix.

Name of the program to be fixed:  
Worldgroup Manager Menu

Name of the vendor for this program:  
Netvillage

Program file location:  
C:\WGMAN\WGSMAINM\GCSMM204.EXE

< Back   Next >   Cancel

Of course, you'll need to save it as a different database name and install it as you did in the steps above. In addition, there may be a slight chance you may need to repeat these steps for our other Worldgroup Manager apps. These apps, specifically, are:

C:\WGMAN\GALFIL\ GCSMM204.EXE  
C:\WGMAN\GALMSG\ GALMS168.EXE  
C:\WGMAN\GALRSY\ GALRS134.EXE  
C:\WGMAN\WGSIGNUP\ GCSUP151.EXE

## **STATUS**

NetVillage has confirmed this to be an issue under WG 4.0 and below.