Ericsson Order Care

Realize Higher Consistency for Faster Time-to-Revenue

Customer Information Management User Guide

2/1553 - CSH 109 420/1 Uen Rev A

Contents

1 Introduction

This document provides information on using the Customer Information Management (CIM) module.

1.1 Purpose and Scope

This guide introduces some basic Customer Information Management (CIM) concepts. It describes how to access CIM through a computer and a Web browser to perform a broad range of customer relationship management tasks.

Readers are not required to have any programming or software development knowledge, but should be comfortable with using a computer and a Web browser such as Microsoft Internet Explorer or Mozilla Firefox.

1.2 Reader’s Guideline

This section describes the version syntax covered in this document and any additional, required information.

Commands that you enter on the command line appear in courier font, such as the following:

```
svnadmin dump C:\SVN\myProject > C:\backupFolder\myProject.bak
```

Document names and sections within documentation are set in italics, such as the following:

For more information on making a copy of your project metadata, see the *Velocity Studio User Guide*, under *Velocity Studio User Interface > Common Actions Outside Velocity Studio*.

Note: To navigate the documentation, an arrow appears (>), which separates each hyperlink to be clicked.

2 CIM Overview

The Customer Information Management (CIM) module is an application for managing:

- Customers
- Accounts (billing accounts)
- Sites (service addresses and corresponding services)
- Addresses (for example, service, billing, and mailing addresses)
- Parties (for example, customer and account contacts)
- Contact media (for example, phone, e-mail, address)
- Quotes/Orders dashboard
- Notes
- Event history

CIM is not intended to offer full support for sales campaigns and other “relationship” aspects of a full Customer Relationship Management tool. However, it can be integrated as a part of the front-end solution for CSRs and other user groups that require customer information. CIM is a configurable and out-of-the-box generic solution with low-level use cases, which can be packaged individually to meet the service provider’s needs. CIM directly integrates with Order Management, Order Negotiations, and Service Registry for a real-time, 360-degree view of a customer and its activities.

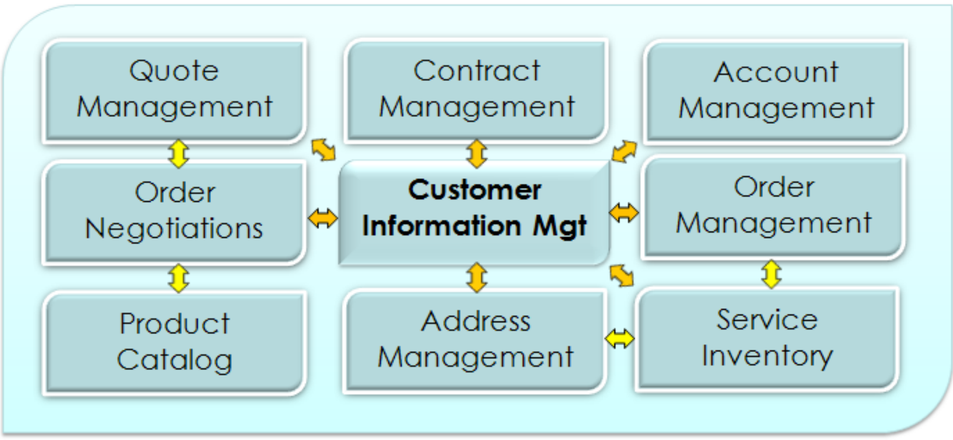

Figure 1 CIM module

The following diagram illustrates how CIM fits into an overall OSS Architecture:

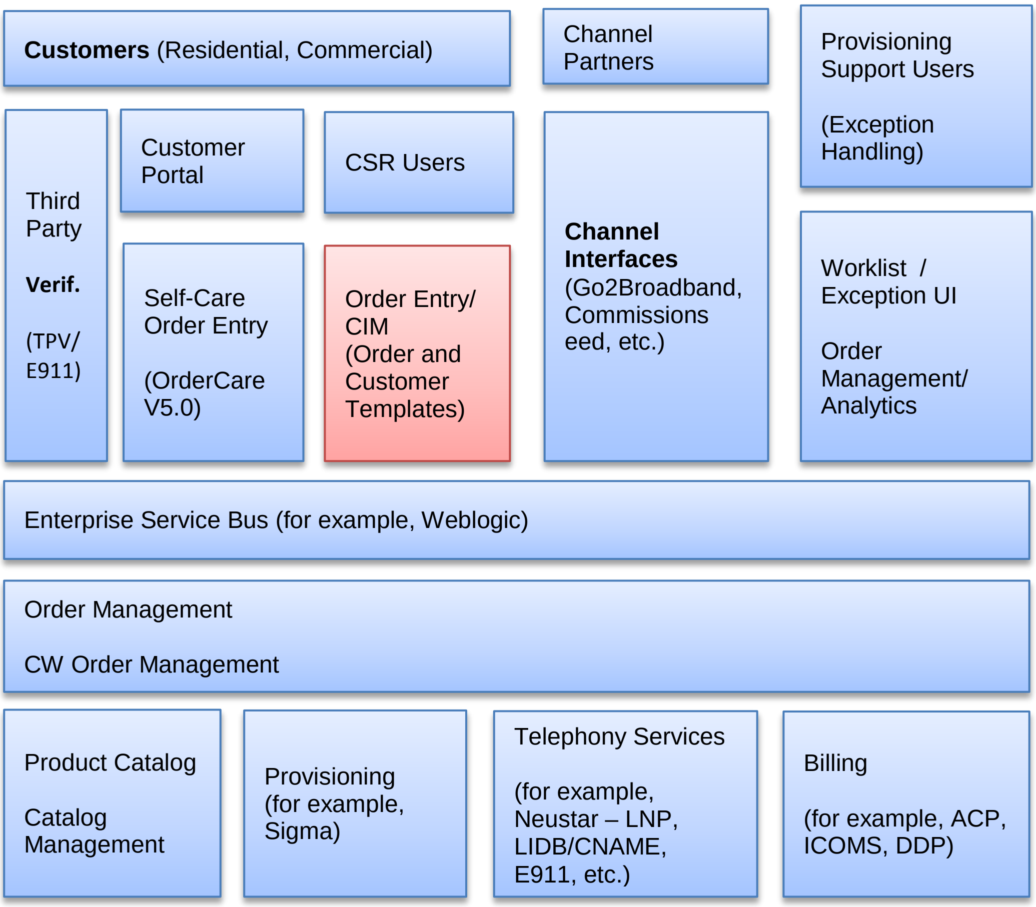

Figure 2 CIM in OSS Architecture

2.1 CIM Functionality

The following diagram shows some typical inquiry activities that can be performed using the CIM system.

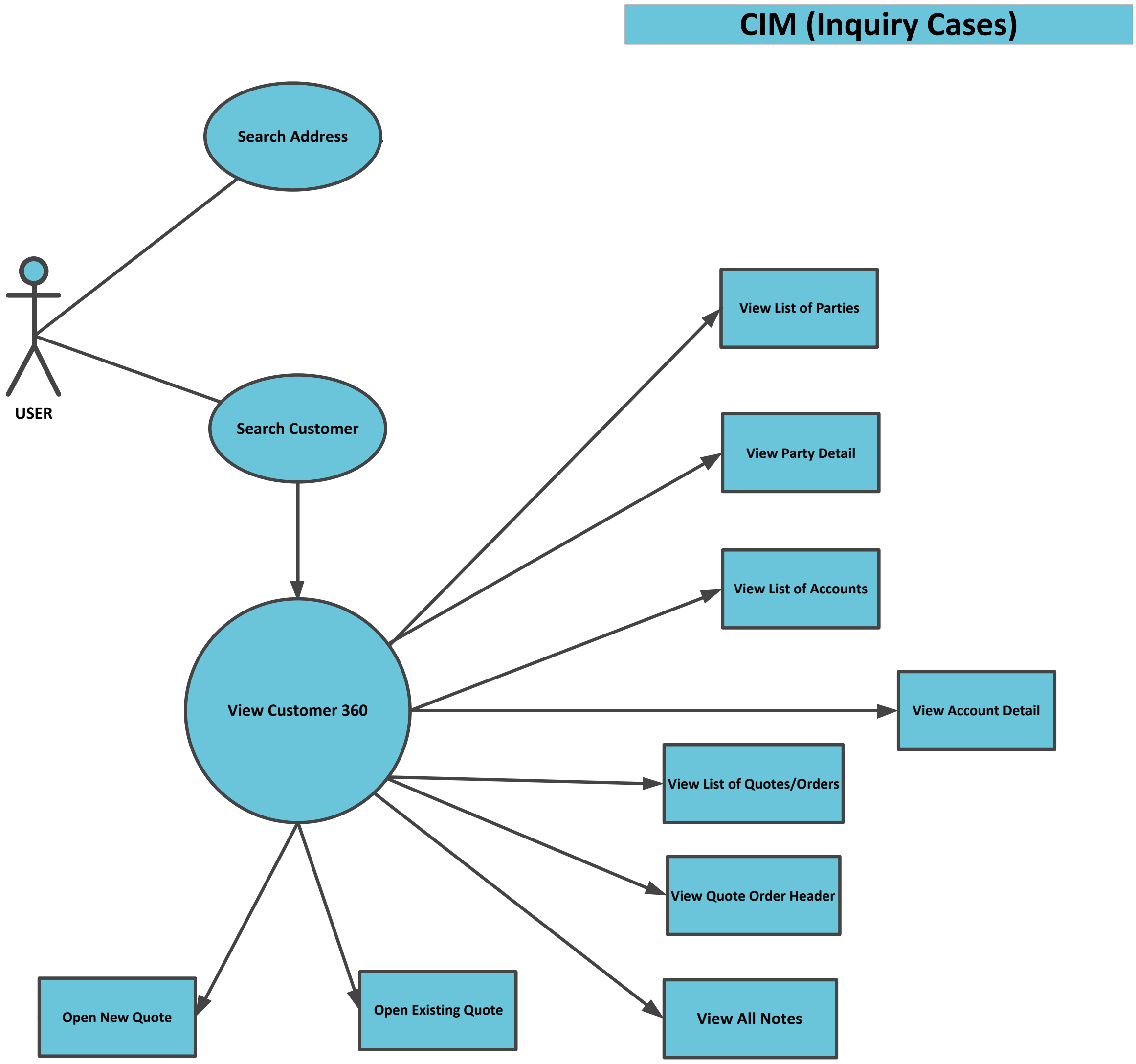

Figure 3 CIM Functionality

These activities and more are described in detail in the *Using CIM - Customer Management* chapter.

2.1.1 SID-based Model of Customer Entities

The SID-based model supports both residential and commercial customer models. The following simplified view persists into the Address, Party, Contact Medium, and Account SID tables, which allow for easy migration and mapping.

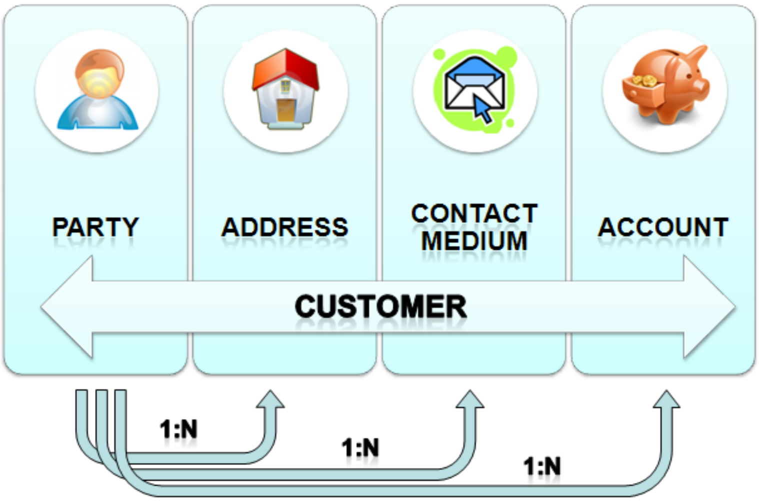

Figure 4 SID- Based Model of Customer Entities

2.1.2 Out-of-the-box Solution

CIM may be used as-is, as no programming or extensions are required. CIM can be configured during runtime.

2.1.3 Ready-to-go User Interface

CIM provides full integration with an existing Velocity Studio user interface, a simplified UI, and intuitive forms and search tools.

2.1.4 Data Validation and Performance

Business rules prevent unrestricted searches.

2.1.5 Provides Services to Other Systems

CIM is an extension of the SID-based Customer template, which has a full SID-facing API.

2.2 Mapping to eTOM: Enhanced Telecom Operations Map

CIM provides the processes highlighted in yellow within the eTOM model (that is, CRM support and readiness). The eTOM model supports the concept of Service and defines high-level process structures. This document focuses mainly on Customer Relationship Management as part of the Operations discipline. Emphasis is on Customer Interface Management, within the **Fulfillment** domain.

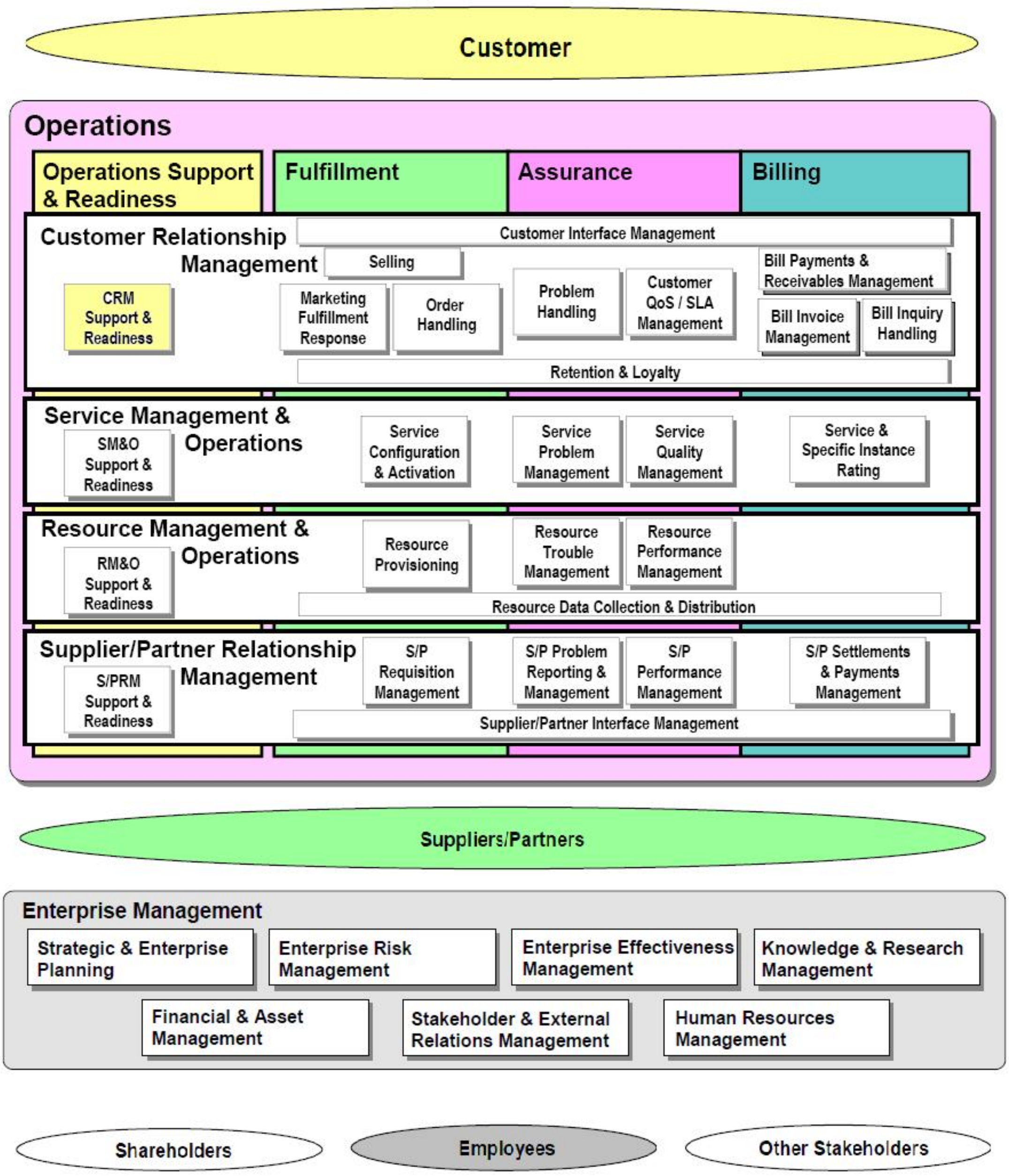

Figure 5 Mapping T0 eTOM

2.3 Mapping to Telecom Applications Map (TAM)

Within the Telecom Applications Map (TAM), which provides an application view of eTOM, the same domain is identified as Customer Information Management:

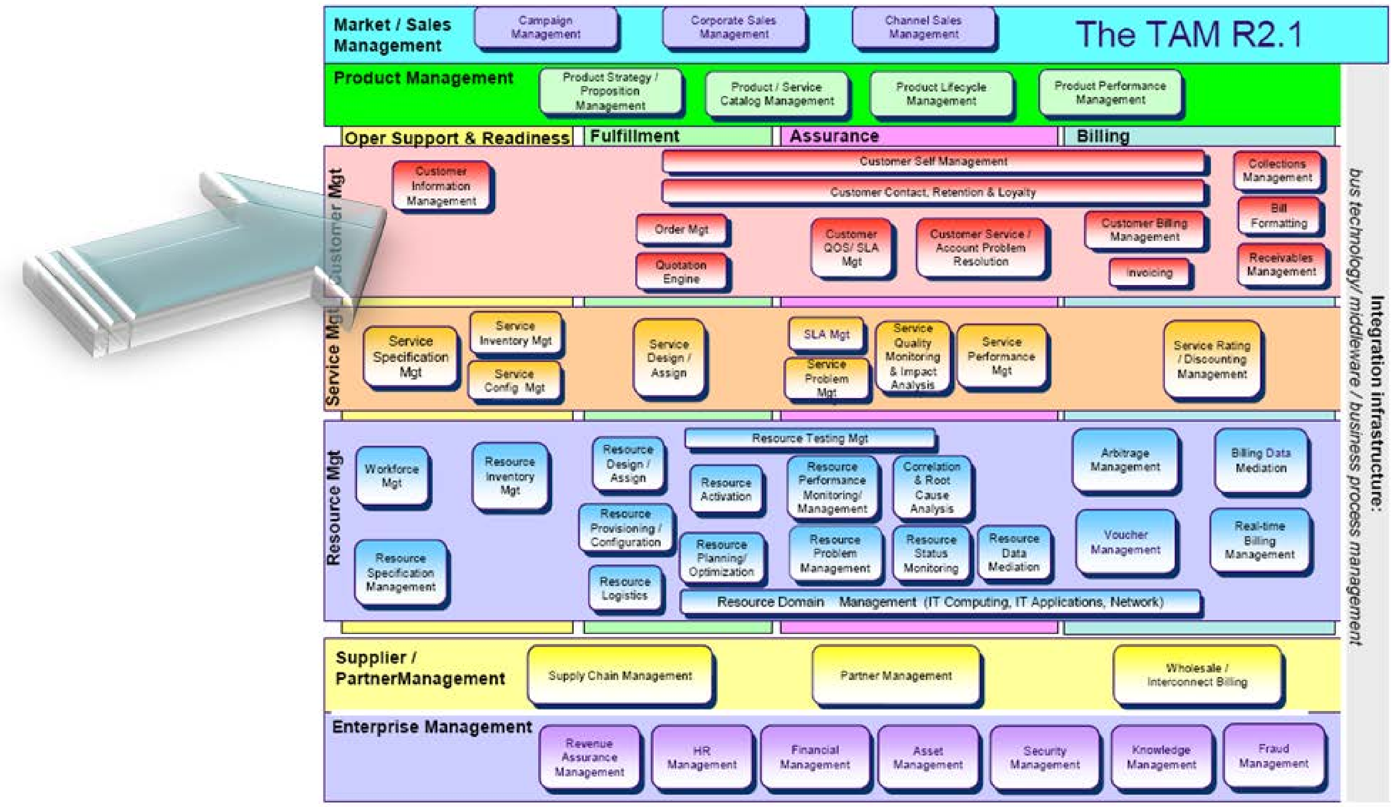

Figure 6 TAM

3 Getting Started

This chapter explains how to log in to CIM and provides an orientation to basic CIM screen navigation features:

- Before you begin
- Accessing CIM
- Handling multiple browser sessions
- Application features
- Security

3.1 Before You Begin

CIM is a Web-based application that requires one of the following browsers. It will not work correctly with other browsers.

Web Browser	Version	URL
MS Internet Explorer	7.0 or later	www.microsoft.com/ie
Mozilla Firefox	3.0 or later	www.mozilla.org/firefox

The following are important points about accessing CIM:

- Before CIM can be used, a user ID and password must be assigned to users by the administrator, along with specific access privileges.
- The user ID for CIM may be the same one assigned to other modules (that is, it is stored in Active Directory). In this case, you cannot change your password from within CIM.
- Everyone accessing CIM, regardless of job function, is a uniquely identified user.
- Each user is assigned to one or more workgroups.
- Each workgroup may be assigned privileges to perform specific functions, such as Create Customer, Update Customer, Modify Address Master, and so on.

3.2 Accessing CIM

To log in to the system, do the following:

1 Enter the following Web address in the address bar of your Web browser: http://*localhost:8080*/cwf
The login screen displays.

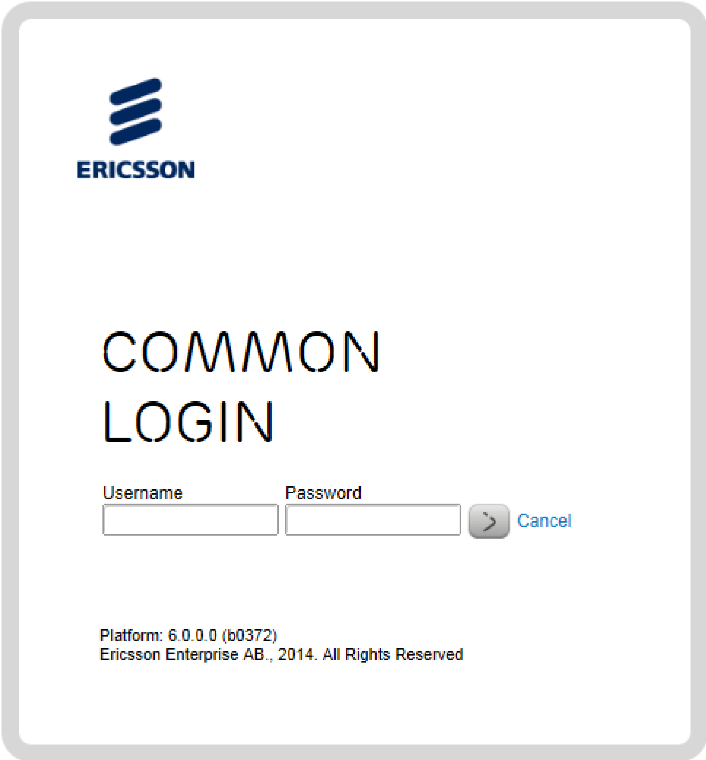

Figure 7 Login

If the login screen does not display, verify that the URL is correct or contact your system administrator to verify that you have the correct URL.

2 Enter your username and password.

The system administrator assigns a username and password to every system user. If you have neither a username, nor password, contact your system administrator.

If you cannot successfully log in, consider the following actions:

- Verify that the username and password are correct (that is, they may be case-sensitive).

- Verify with your system administrator that you have the correct username and password.

3 Click the **Login** button.

You may have access to more than one application. From the Select Application window, highlight **Customer Information Management New** and click the **Select** button to begin.

3.3 Multiple Browser Sessions

Opening multiple browser sessions may be helpful in certain scenarios. However, if you do open multiple sessions, be sure that you do not inadvertently open a *shared* session.

A *shared* session occurs if you open a second browser window by selecting **File** > **New** from your current browser session, or if you use shortcuts to access the CIM URL that does not require logging into each instance of CIM separately.

If you have multiple windows open, but you logged in only once, then you are sharing sessions and will experience data corruption problems.

If you need to open multiple sessions, use the option from **Start** > **Programs** > **Internet Explorer** or **Firefox** to open separate browser instances.

3.4 Overview of the CIM User Interface

This chapter describes the layout of the user interface and presents an overview of the functionality.

The CIM user interface can be divided into these areas:

- Application layout
- Menu
- General types of user interface elements
- Understanding UI field masks

3.4.1 Application Layout

The Application layout consists of the following general sections:

- Menu bar
- View options
- Search filters
- Object details
- Actions menu

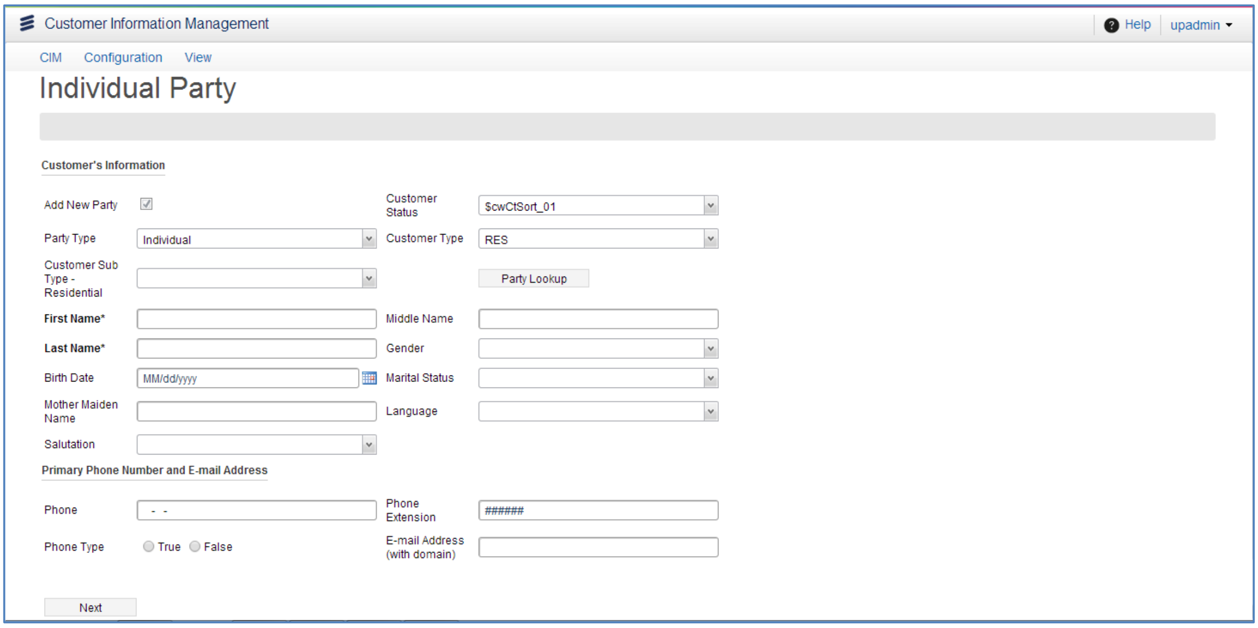

Figure 8 New Customer Form

3.4.2 Menus

The menu bar consists of a row of main menus near the top of the screen:

- CIM
- Configuration
- Tools

CIM Menu

The CIM menu contains the following submenu options:

- **New Customer**: Create a new customer
- **Search Individual**: Search for individuals
- **Search Organization:** Search for organizations
- **Manage Address**: Manage address information
- **Search By Site**: Search by site location
- **Manage Notes**: Manage notes information

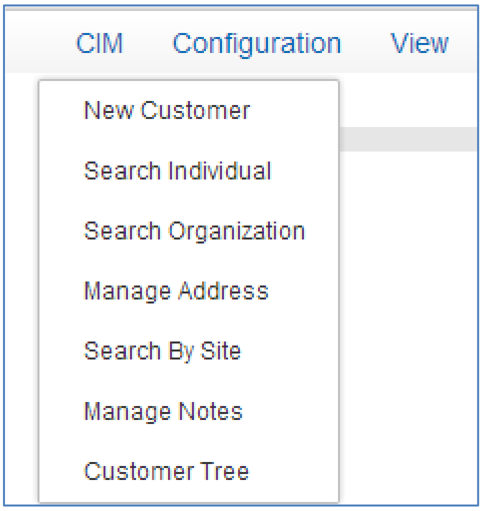

Figure 9 CIM Menu

Configuration Menu

The Configuration menu contains the following submenu options:

- **Code Tables**: Runtime configuration of the System List box
- **CIM Config:** Configuration settings for the CIM application

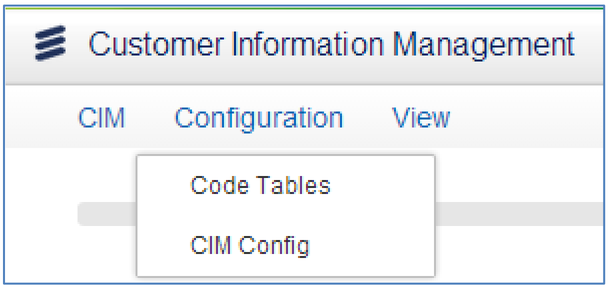

Figure 10 Configuration Menu

Tools Menu

The Tools menu contains the following submenu options:

- **Event Log**: Shows system messages
- **Information:** Displays general Frame work information
- **Select Application**: Allows you to exit CIM and enter a different application
- **Logout**: Allows you to log out of CIM and end your session
- **Change Password:** Allows you to change your password

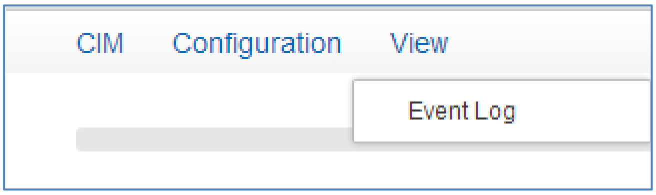

Figure 11 Tools Menu

3.4.3 General Types of UI Elements

The following general types of UI elements are used in the CIM module:

Field Type	Description	Example
Data Display	Data display fields show data that cannot be modified. Right-click to copy	Party - Entity Type: Individual
Text field	Text fields allow you to type any alphanumeric characters.	Last Name
Number field	Number fields only accept numeric characters 0–9	Phone Extension: ######
Date field	Date fields allow you to type a date and time in numeric format. You may also select using the Calendar icon	Birth Date: MM/dd/yyyy
Checkbox	Checkboxes can be selected or deselected to indicate a true/false flag	Add New Party
Radio button	Radio buttons allow you to choose between two or more mutually exclusive options	Phone Type: Home, Work, Mobile
List box (dropdown)	List boxes allow you to select from a predefined list of options	Gender: Male, Female
Confirm box	When performing some of the tasks described in this guide, a confirmation dialog box may appear	
Button	Buttons accept user input to perform some predefined action	Next

Figure 12 UI Elements used in CIM module

3.4.4 Understanding UI Field Masks

The following illustration shows various types of UI fields, where their symbols or masks are defining formats for each field's value.

Type	Symbol/Mask	Example
Mandatory field	*	Postal/Zip Code * L5B2C7
Date	MM/DD/YYYY	End Service Date MM/dd/yyyy
Date/Time	MM/DD/YYYY hh:mm:ss	
Numeric	#(N) where N denotes the number of digits. Ex. #(5) captures up to 5 digits	Distance from CO #(5)
Percentage	###, takes values up to 100 **Note:** usually the label will let you know the type is a percentage (%)	Signal Quality ###

Figure 13 UI Field

3.5 Security

For your security and privacy, after 30 minutes of screen inactivity, CIM automatically terminates your session by logging you out.

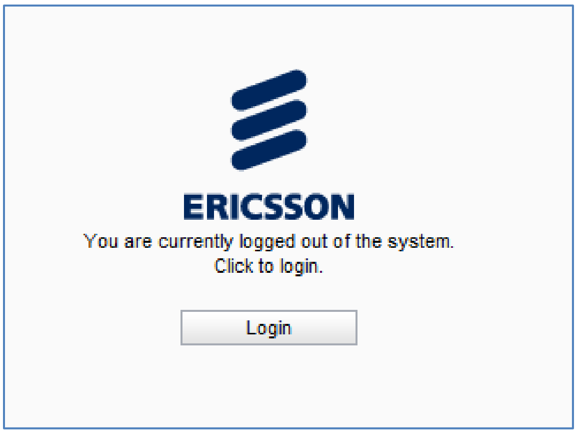

Figure 14 Logout screen

To return to CIM, you can either click the **Login** button, or refresh your browser and log in again.

To properly log out of CIM, select **upadmin->Logout** from the menu bar.

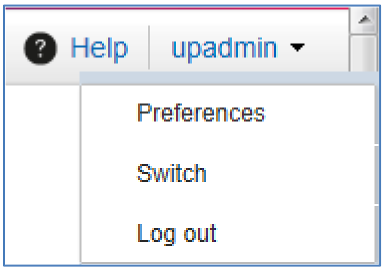

Figure 15 Logout from Menu

3.6 Code Tables

Code tables drive the selection options for some list-box entities. To add or edit these options, click **Configuration > Code Tables** from the menu bar.

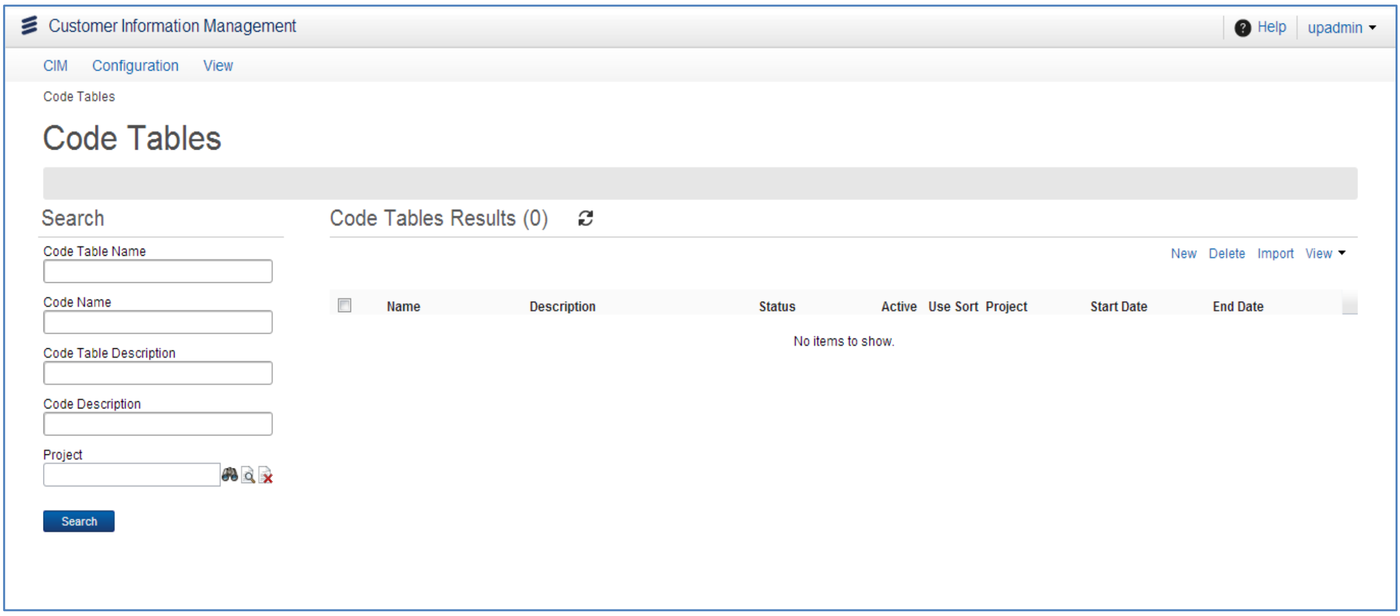

Figure 16 Code Tables

A code table contains codes and may also include codes from another code table. Code Tables in XML format can be imported using the **Import** option from the actions bar at the bottom of the screen.

Many system code tables that come with the core CIM installation contain “dummy” codes and require deployment-specific configuration.

3.6.1 Editing Code Tables

To edit a code table and add new code, do the following:

1. From the menu bar, click **Configuration** > **Code Tables**.
2. Click **Search**.
3. Select the table to be changed and then click the **Edit** button.
4. To add a new code, in the **Code** tab, click the **Add Code** button and enter the required information. Click the **Save** button to save the new code.
5. Save the code table by clicking the **Save** button.

4 Using CIM – Customer Management

This section describes how to find and create a new customer in CIM. This section also describes the screens for developing a customer model.

4.1 New Customer

To create a new customer record, click **CIM** > **New Customer** from the menu bar or click the corresponding button within the Customer finder:

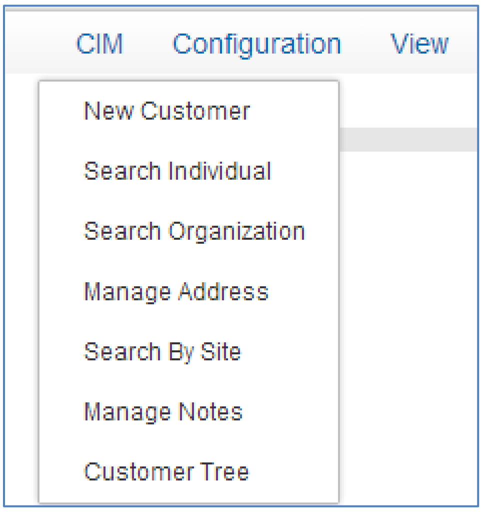

Figure 17 New Customer from CIM Menu

The New Customer form appears for input:

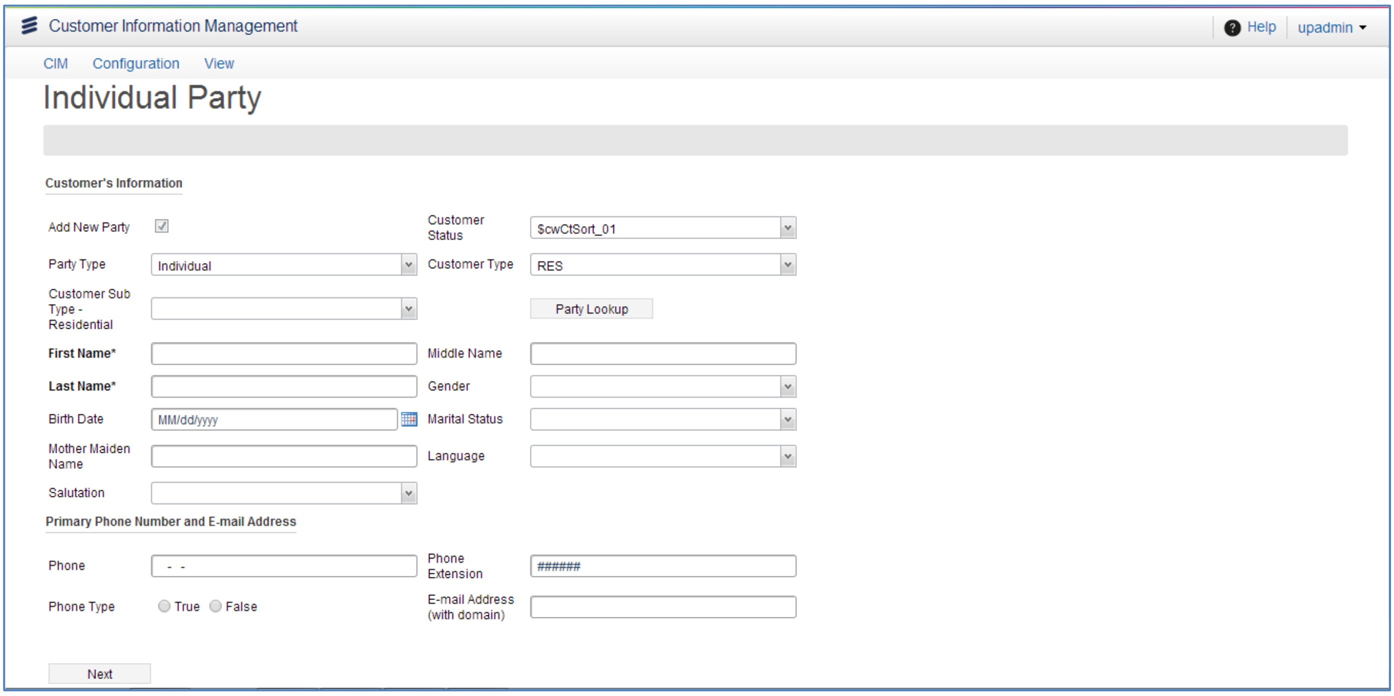

Figure 18 New Customer Form

The following fields appear on the New Customer form:

- **Party Type** - Choose from one of the following options:
    - **Individual** – select either **Residential** or **Commercial** for the **Customer Type**.
    - **Organization** – select the following:
        - **Customer Type** as either Residential or Commercial
        - **Customer Sub Type-Commercial** as either Carrier, Enterprise, or Wholesale
- **Party Lookup** – Search and select an existing Party. Refer to the *Configure a Party- Party Master Lookup* section.

The following screen displays all necessary information:

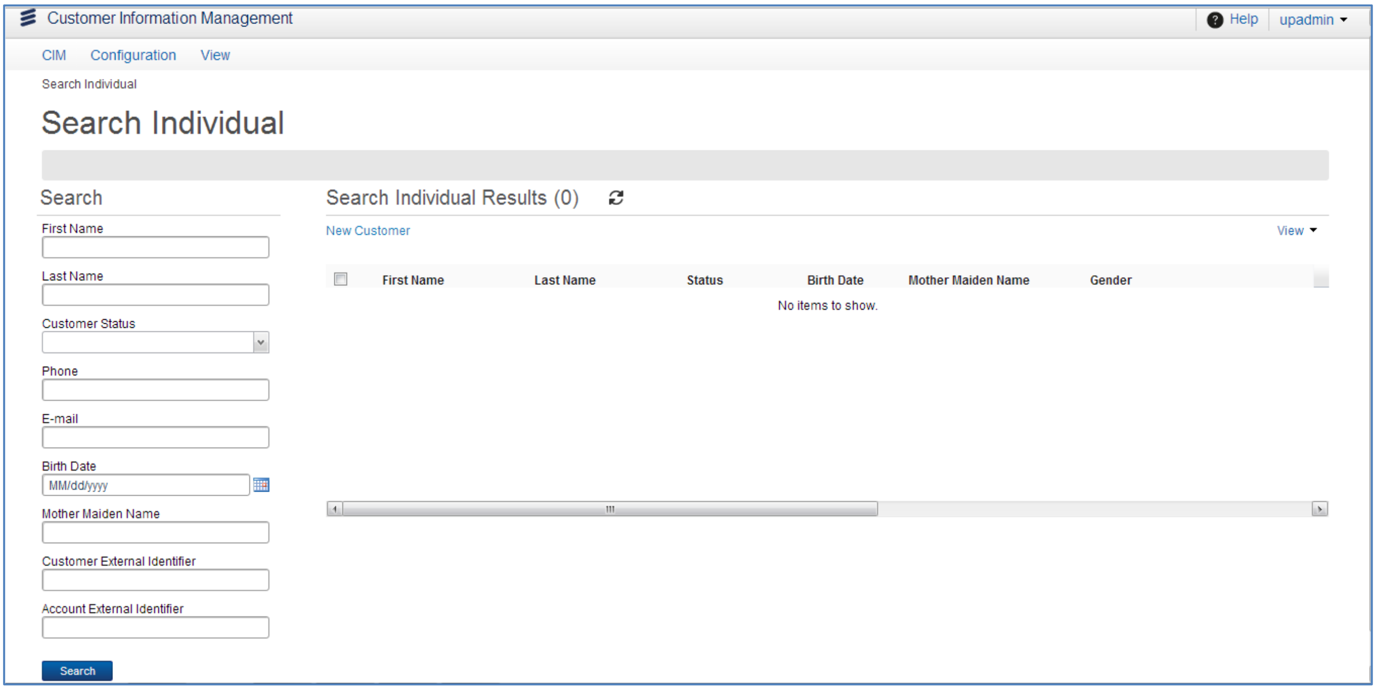

Figure 19 Search Individual

- **Customer's Information** – Refer to the Configure Customer's Information section.
- **Define Primary Contact Information** – Refer to the Configure Contact Information – Primary Phone Number & Email Address section
- **Configure Service and Billing Addresses** – Refer to the Configure Service and Billing Addresses section.
- **Next button:** Clicking this button takes you to the Customer 360° view for the new customer that was created.

4.1.1 Configure Customer's Information for an Individual

Enter the customer's **First Name** and **Last Name**, as fields marked with an asterisk (*) are required. Fill in the other field in this section, as needed.

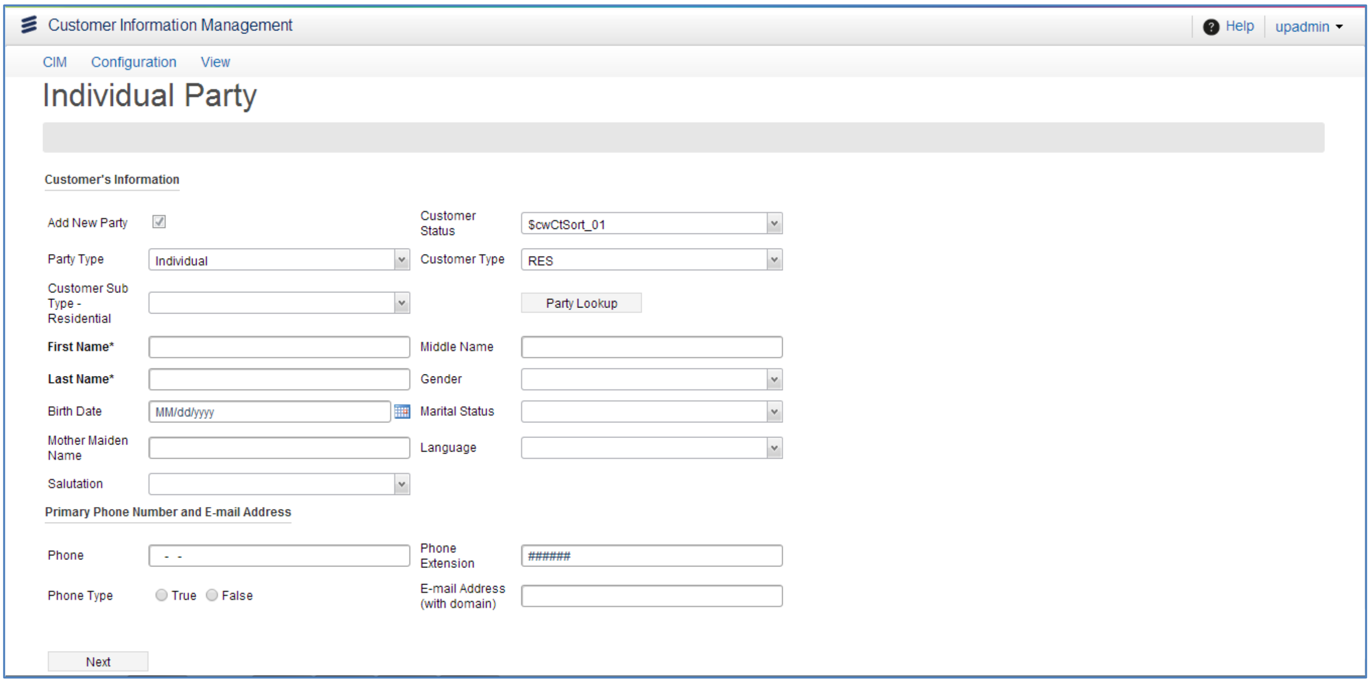

Figure 20 Customer's Information

4.1.2 Configure a Party - Party Master Lookup

From the Customer Information form, click **Party Lookup** to display the Reference Finder.

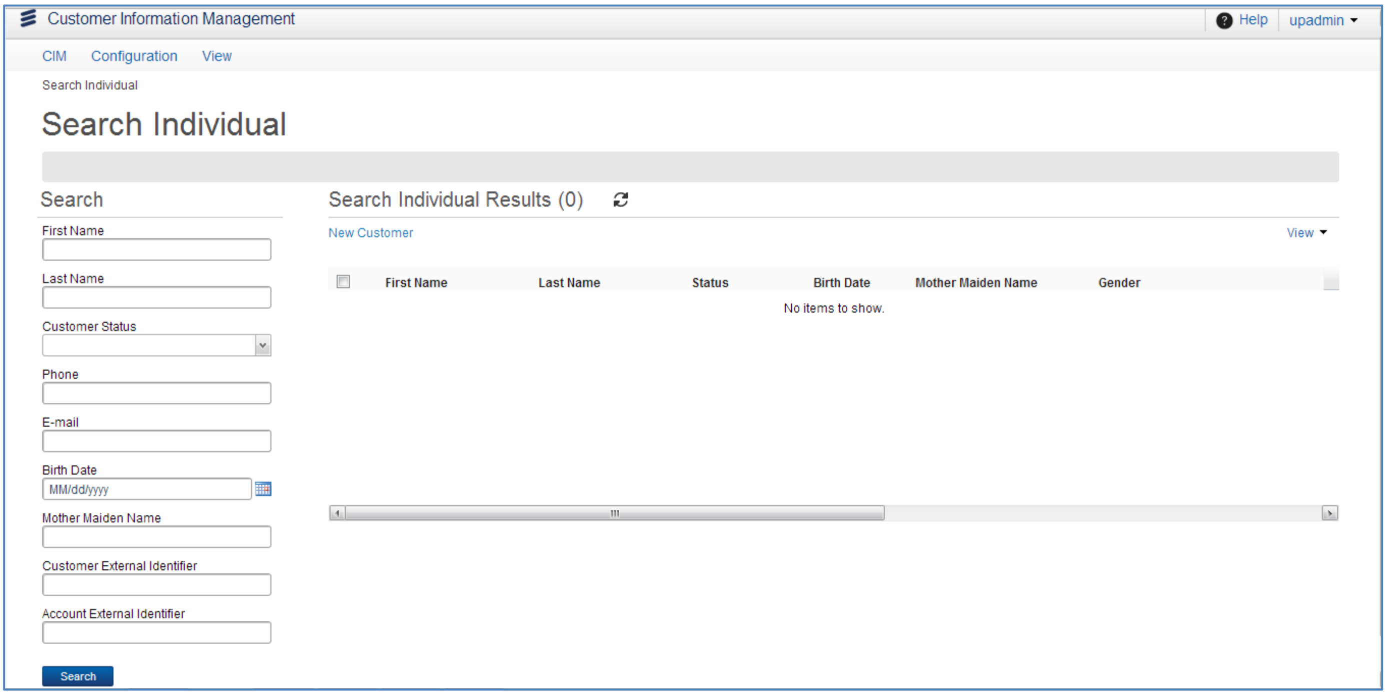

Figure 21 Individual Search

To search for a party, enter your search criteria in the available fields and click the **Search** button. Then, click the party that you want and click the **Select** button to edit the party. Otherwise, if you cannot find the party that you want, click the **New Customer** icon to create a new customer.

4.1.3 Party Lookup

The Party Lookup allows you to search and select from a list of existing parties. If selected, you can choose to update the existing record or to create a new Party using the **Add New Party** checkbox from the Customer's Information form.

4.1.4 Configure Contact Information - Primary Phone Number and Email Address

You can change the following contact information fields:

- **Phone** – A numeric field with an optional Phone Extension field. A Phone Type option must be selected.
- **Email Address** – This field must include domain name (for example, user@ericsson.com).

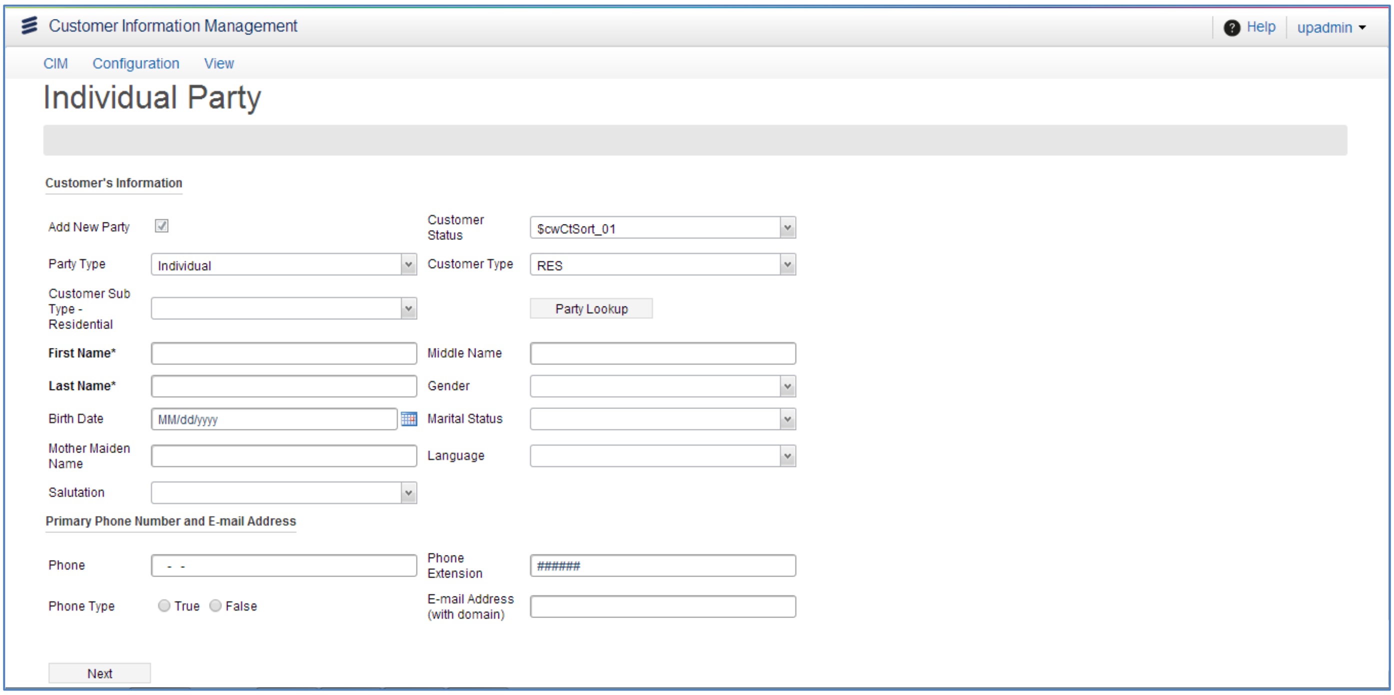

Figure 22 Configure Customer Information

4.1.5 Configure Service and Billing Addresses

To define the service address, do the following:

1 Click the **Sites** node from the tree menu.

Figure 23 Tree Menu

2 The Customer Tree Site Finder appears. Click **Add Site** on the action menu to add site information.

3 From the Site Info form, click **Address Lookup** to launch the Address Master Finder.

4 Click the **Add** button from the action menu to add a service address:

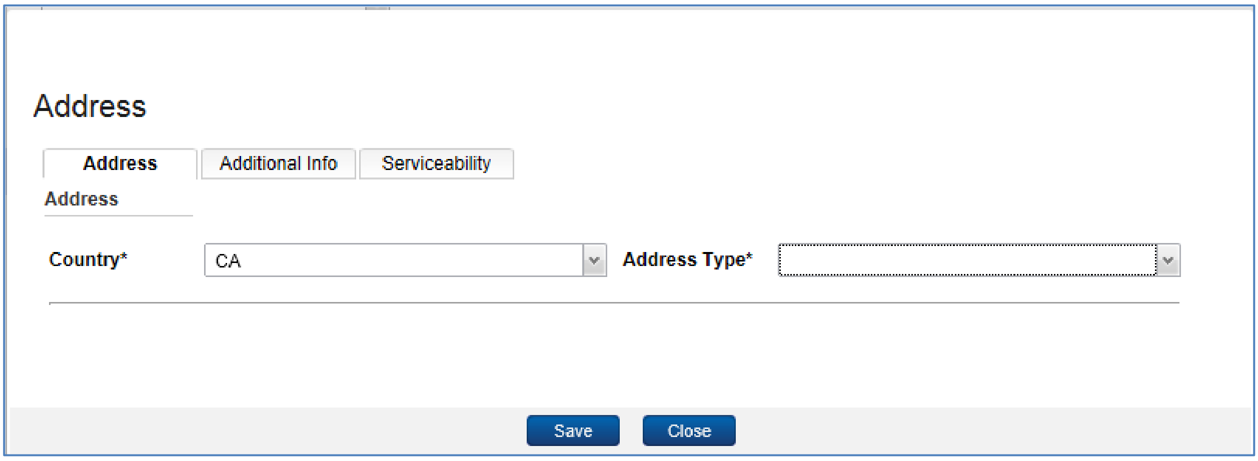

Figure 24 Add Address

5 Click the **Save** button to save your changes.

Billing Address

To define the billing address, follow steps 1 through 3 in the defining a service address procedure. Then do the following:

1 Select the **Same as Service Address** option.

2 Select the **Address Lookup** option to see a list of billing addresses.

4.1.6 Define an Address Using the Address Master

You can define an address in the Address Master. The Address Master is a finder that is designed to sort and search all addresses in the system. To launch the Address Master, do the following:

1 From the main menu, click **CIM** > **Manage Address**.

2 The Address Master Finder can be used to select an existing address or new address information (see *Manage Address*).

4.1.7 Add, Change, or Delete a Contact

Once you have selected a customer, the node tree menu for that customer appears on the left hand side. A customer contact can be added, or an existing contact can be changed or deleted.

To add or change a customer contact, do the following:

1 From the main menu, click **CIM** > **Search Individual** or **Search Organization**.

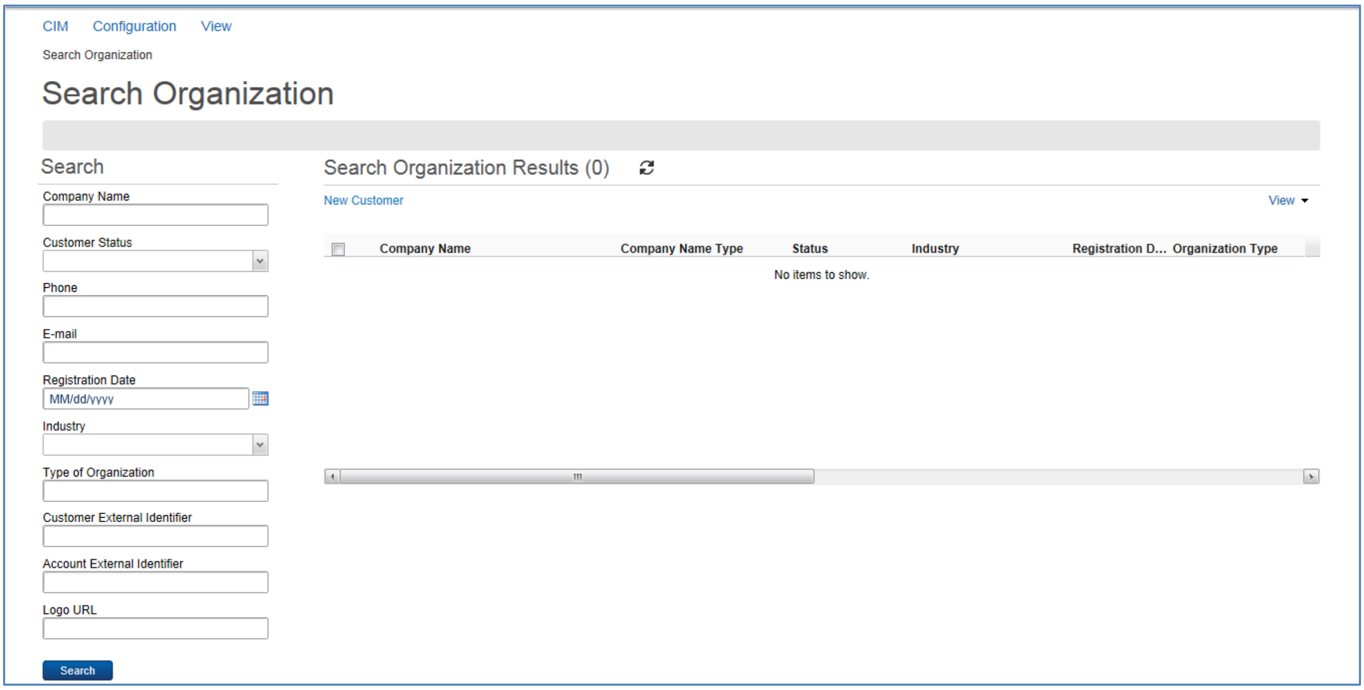

Figure 25 Search Individual/ Organization

2 Perform a search on a customer and then select a row from the search results by double-clicking it. The Customer Info form appears, as does the tree node menu.

3 Click the **Party** node.

Figure 26 Party from Menu

4 The Search Individual Results finder appears and contains an action menu.

Figure 27 Action Menu

5 Click the **Add Party** button to add a new contact or select a row from the finder to change an existing record.

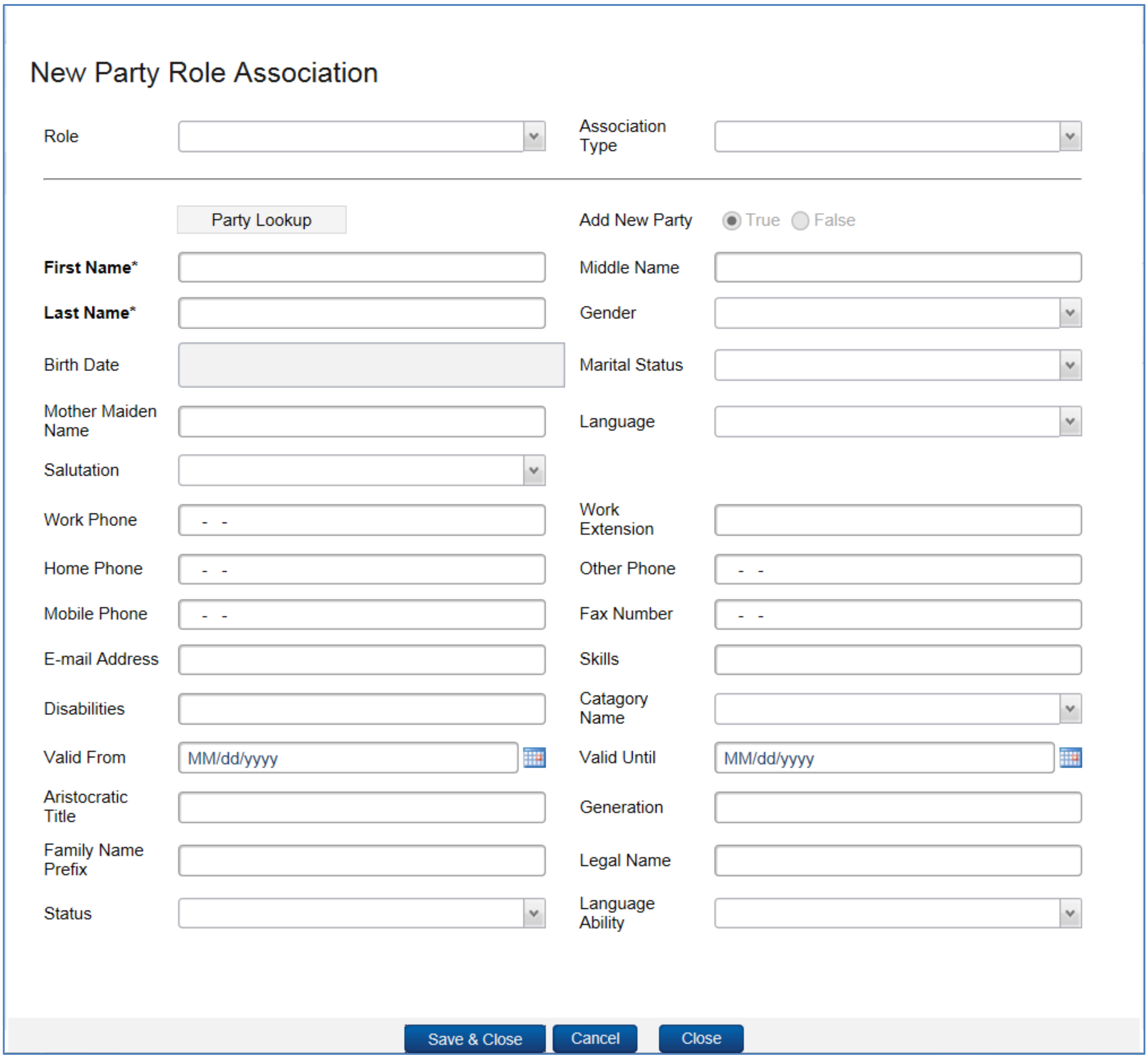

Figure 28 Party Information form

All customer detail fields can be changed.

6 Click the **Save and Close** button to save the record and exit.

To delete a customer contact, do the following:

1 From the Customer Information tree node menu, select the **Contacts** node to display the Search Individual Result finder.

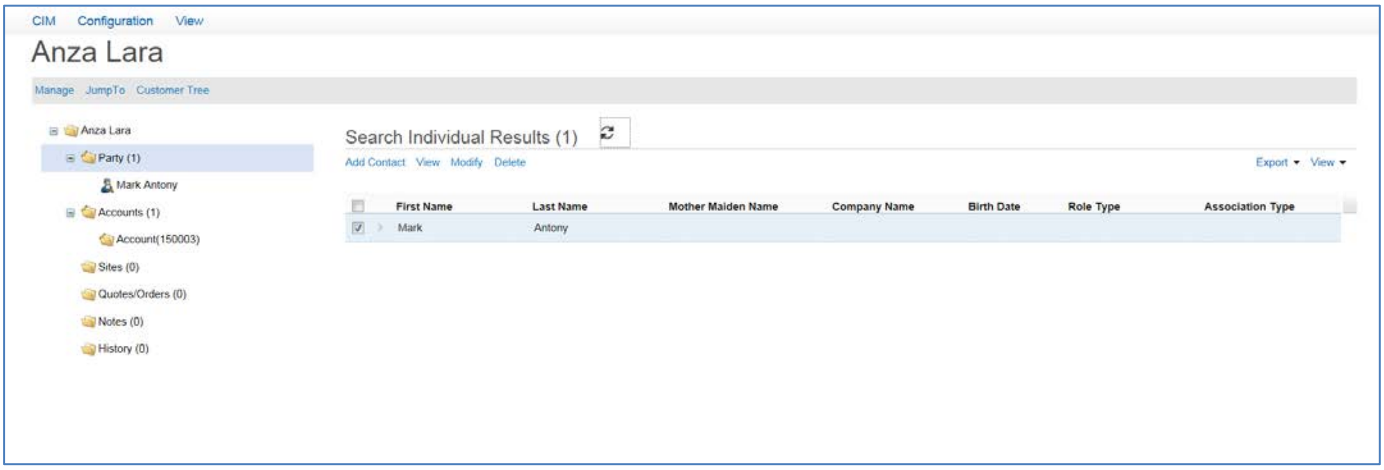

Figure 29 Delete a Party

2 Select a row from the search results and click the **Delete** button from the action menu.

4.2 Search Individual

The Search Individual form allows you to perform a search on customers that are designated as a party type individual.

To find a customer, do the following:

1 From the menu bar, click **CIM** > **Search Individual**.

The Search Individual finder screen appears, which is a search and retrieval tool for individual customers. You can conduct your search using the following criteria:

- First Name
- Last Name
- Customer Status
- Phone
- E-mail
- Birth Date
- Mother Maiden Name
- Customer External Identifier
- Account External Identifier

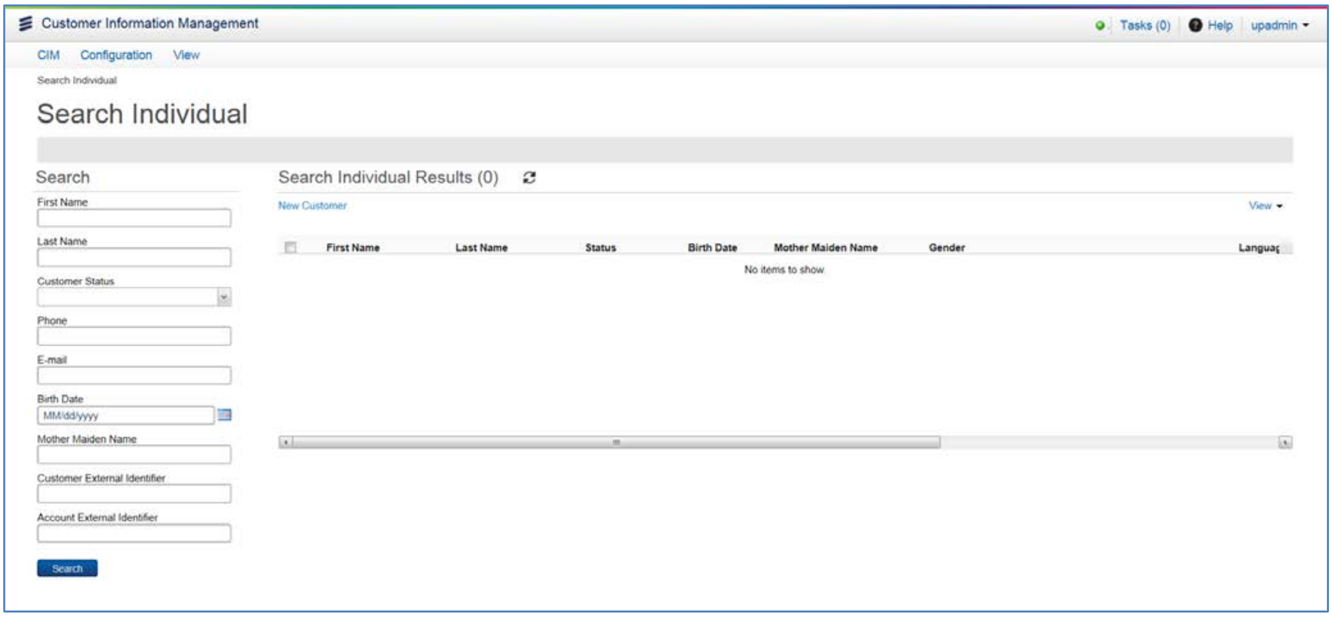

Figure 30 Search Individual

2 Enter your search criteria and click **Search** to return a list of search results.

3 From the search results, you can view details on the customer by double-clicking the search results row. The customer details display in the Customer Info form.

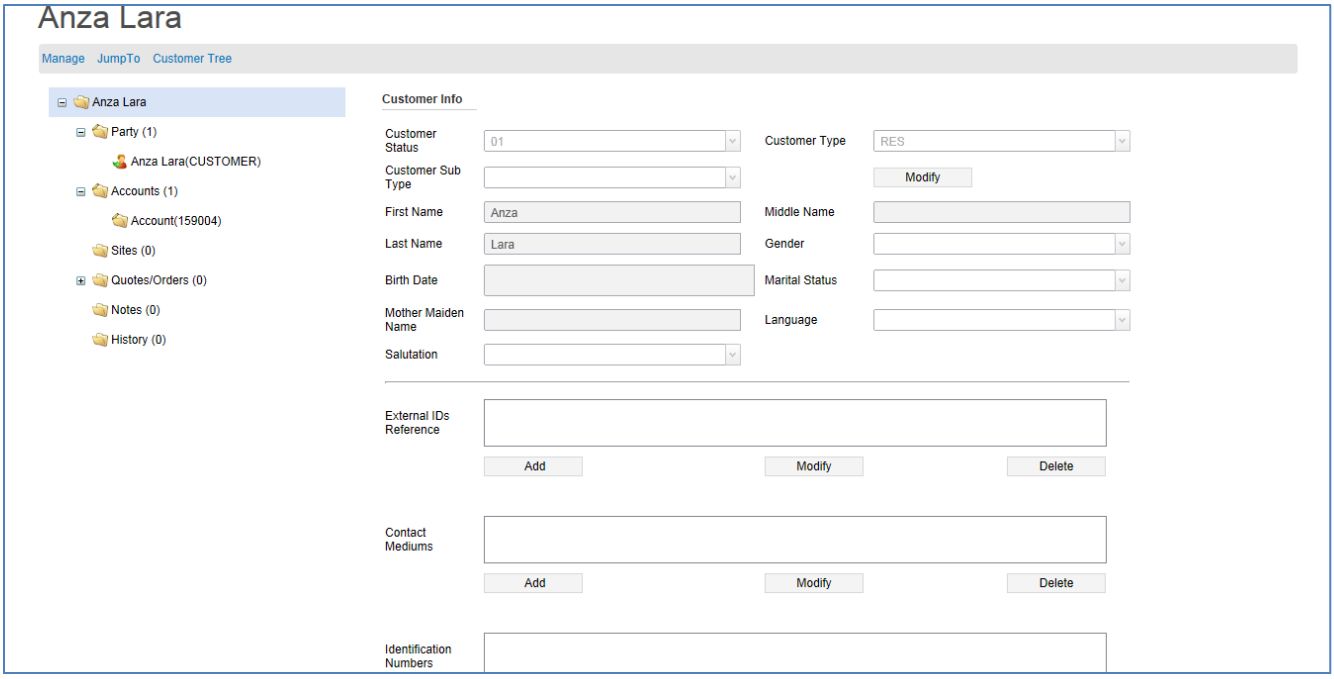

Figure 31 View Detail of a customer

4.3 Search Organization

The Search Organization form allows you to perform a search on customers that are designated as a party type organization.

To find a customer, complete these steps:

1 From the menu bar, click **CIM** > **Search Organization** to launch the Search Individual finder, which is a search and retrieval tool for organization customers.

You can conduct your search using the following criteria:

- Customer Name
- Customer Status
- Phone
- E-mail
- Registration Date
- Industry
- Type of Organization
- Customer External Identifier
- Account External Identifier
- Logo URL

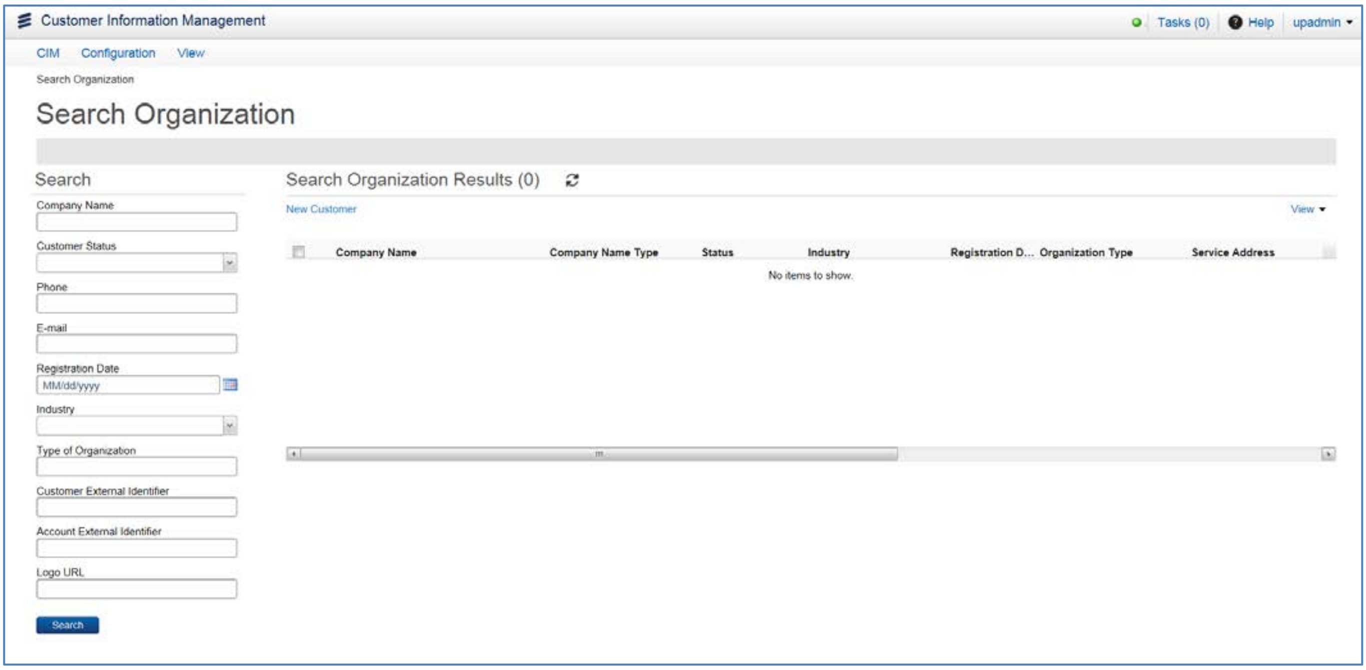

Figure 32 Search Organization

Wildcard searches using the % character returns partial matches on any search criteria field. For example, performing a **Customer Name** search using *Eri%* returns Ericsson Software.

2 Enter your search criteria and click **Search** to return a list of search results.

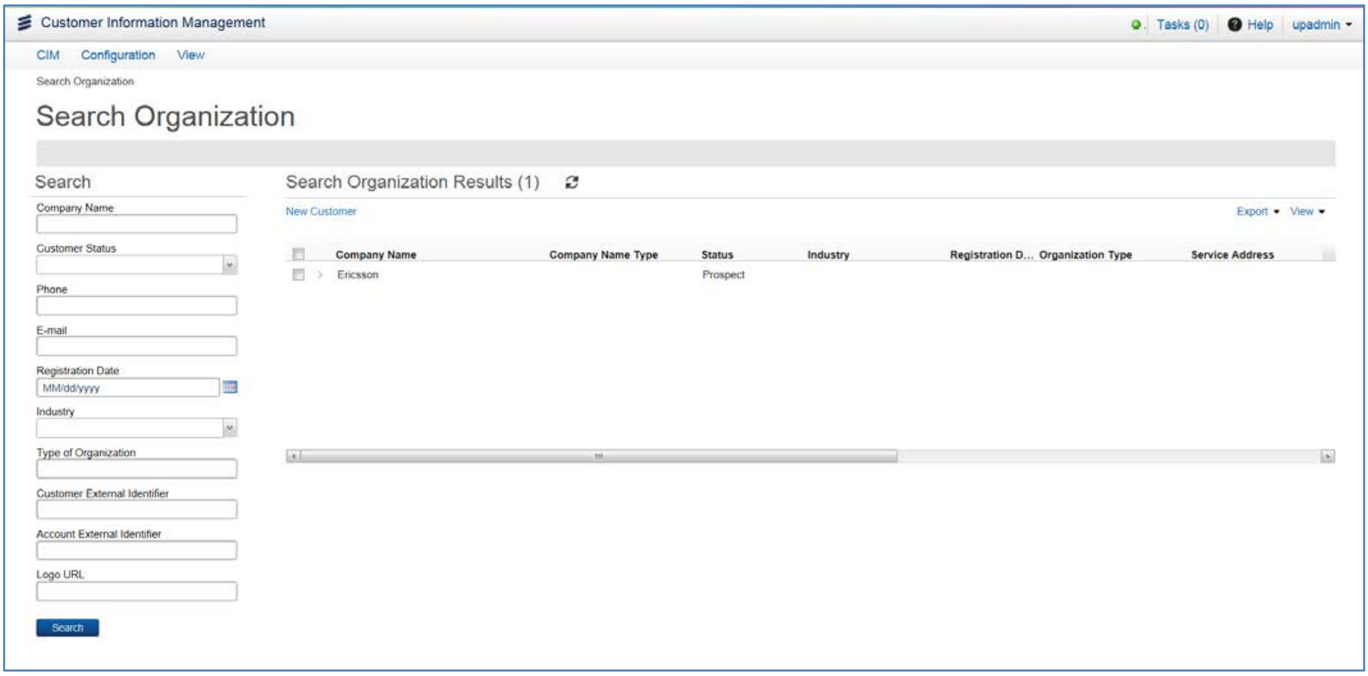

Figure 33 Search Criteria

The results display based on the search criteria of the matching customer organization. If there are no search result matches, the system returns an empty list and displays the message, No Customer Found.

From the search results, you can view details on the customer by double-clicking the search results row. The customer details display in the Customer Info form.

4.4 Manage Address

The customer or organization address exists in the internal customer database. It may be associated with a customer, contact, site, or account, or it may exist without any association.

Clicking **CIM** > **Manage Address** from the menu bar displays the Address page. You can perform the following tasks and actions from this page:

- Search address
- Clear search criteria
- Export the results
- View
- Add New address

4.4.1 Search Address

You can initiates a search based on your filter values. The following steps are to perform the search:

1. Click **CIM** > **Manage Address** menu; the **Address** page appears.
2. Enter your search criteria in any of the fields provided for search area. For example, you can search by County or Address Type. The following table describes the fields:

Field	Description
Country	This field denotes a drop-down list of pre-populated country names.
Address Type	This field indicates the type of address. The following types are available: • Civic Address • General Delivery • Latitude and Longitude (Lat/Long) • Other • P.O. Box • Rural Route

Note: Unrestricted searches are not allowed, meaning you must enter at least one search filter.

3. Click the **Search** button; the results displays in the result area.

4.4.2 Clear Search Criteria

Click this option to clear any value you have entered in the search filters.

4.4.3 Export

You can export the address results in XLS, CSV, and XML format. The following steps are for exporting results from in the XLS format. These steps are similar for exporting the results in the CSV and the XML formats.

1. Follow the steps described in the previous section of this document to search the addresses.
2. Click the **Export** button and select the **to XLS** option from the drop-down list.

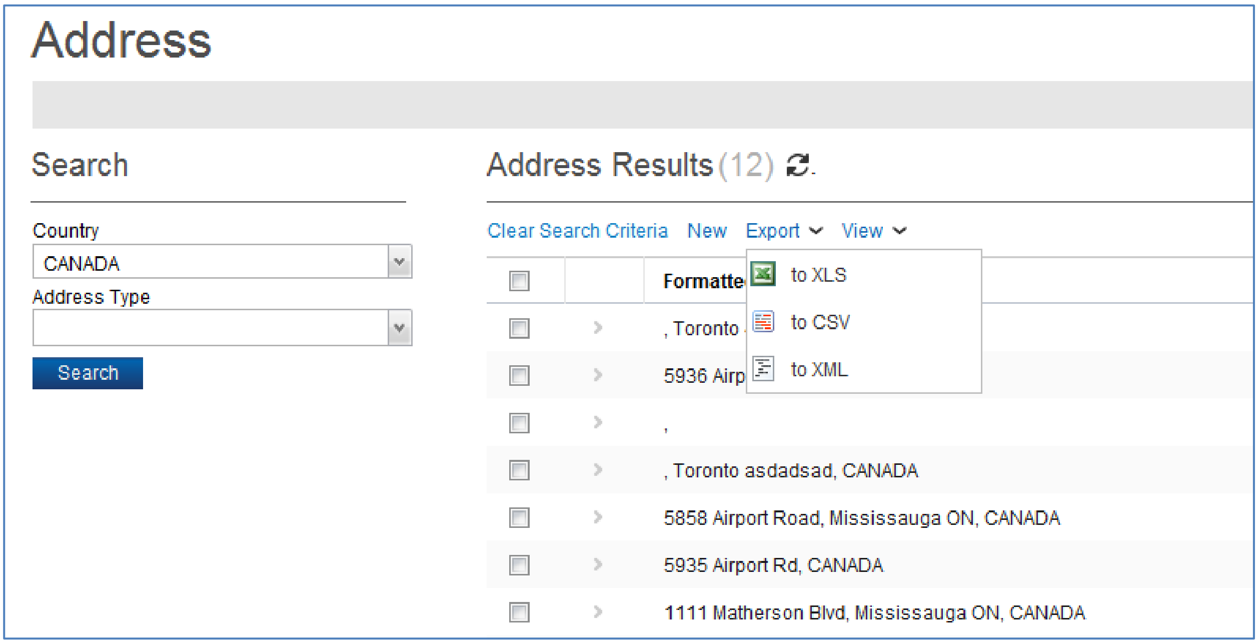

Figure 34 Export the results

3. Depending on what Web browser you are using, you are prompted to open or select a directory location to save your file. The default filename is _cwf_finder.xls. You can change this name, if required.
4. When you open the .xls file, the results appear in your exported file.

4.4.4 View

This option displays a list of customized views available for the address page. Click the **View** button and select one view from the list. The appearance of the Address page changes according to the setting in the selected view.

4.4.5 Add New Address

The address finder sorts and searches all addresses in the system. All addresses, regardless of type, are stored in a single table and displayed as a formatted address.

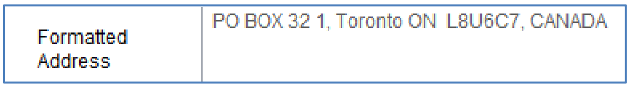

Figure 35 Formatted Address

To create a new address from the address page, follow these steps:

1. From the Address page, click the **New** button.
2. The New Address page appears. This page has Address, Additional info and, Serviceability tabs.
3. Enter the information in the **Country** and **Address Type** fields (for example, Canada and PO Box). Once you have selected an Address Type,

the form changes to show the fields required for an address of that particular type. Enter the information in the fields. See the [Address Types](#) section for details on the fields.

4. Click the **Save** button. A confirmation message displaying that the address has been changes appears.
5. The final formatted address appears on the header of address page.

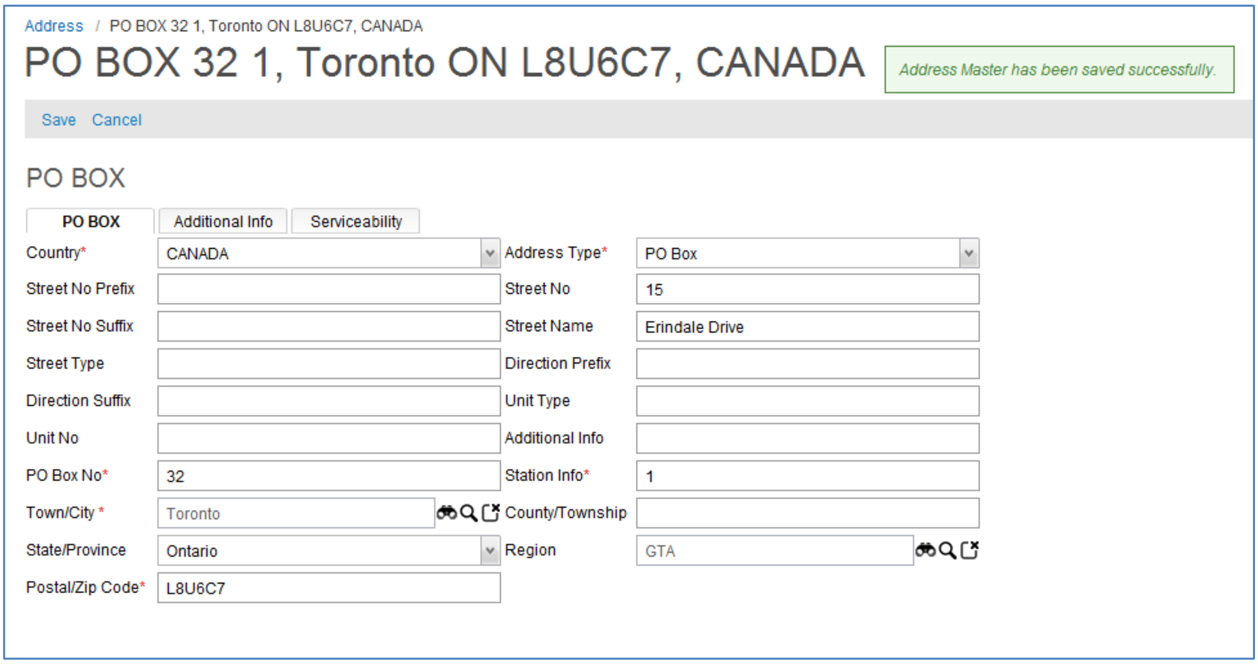

Figure 36 New address tab

6. Click the Additional Info tab. This tab provides building information and external identifier definitions related to the mailing address.

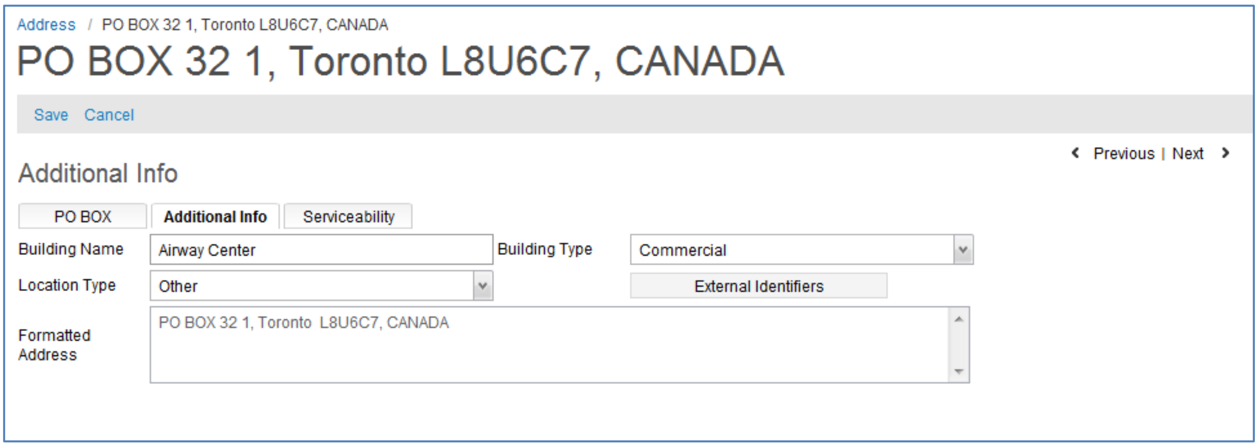

Figure 37 Availability info tab

The following table describes the fields available for this page:

Field	Description
Building Name	This field indicates the name of the building.
Building Type	This field indicates what type of the building is related to the address. The drop-down list of this field contains the following options: • Residential • MDU • Apartments • Commercial • Condominiums
Location Type	Select the option from this drop-down list to specify the type of location.
External Identifiers	Clicking External Identifiers button provides the ability to define aliases for this address (that is, interfacing systems). External Identifier is an object that is used to capture information about the identification of an address by an external system. To configure external identifiers, see the Configure External Identifiers section.
Formatted Address	This field displays the address in a formatted manner.

7. Click the **Save** button to save the changes.
8. Click the Serviceability tab, which contains site-specific details related to the installation and provisioning of services. Enter the information in the applicable fields and click the **Save** button.

4.4.6 Address Types

You can use different address types when creating a new address. Each address type displays different address fields. This section provides you the information on various address types.

4.4.6.1 Civic Address

Clicking Civic Address option from the drop-down list of Address Type field displays the Civic page.

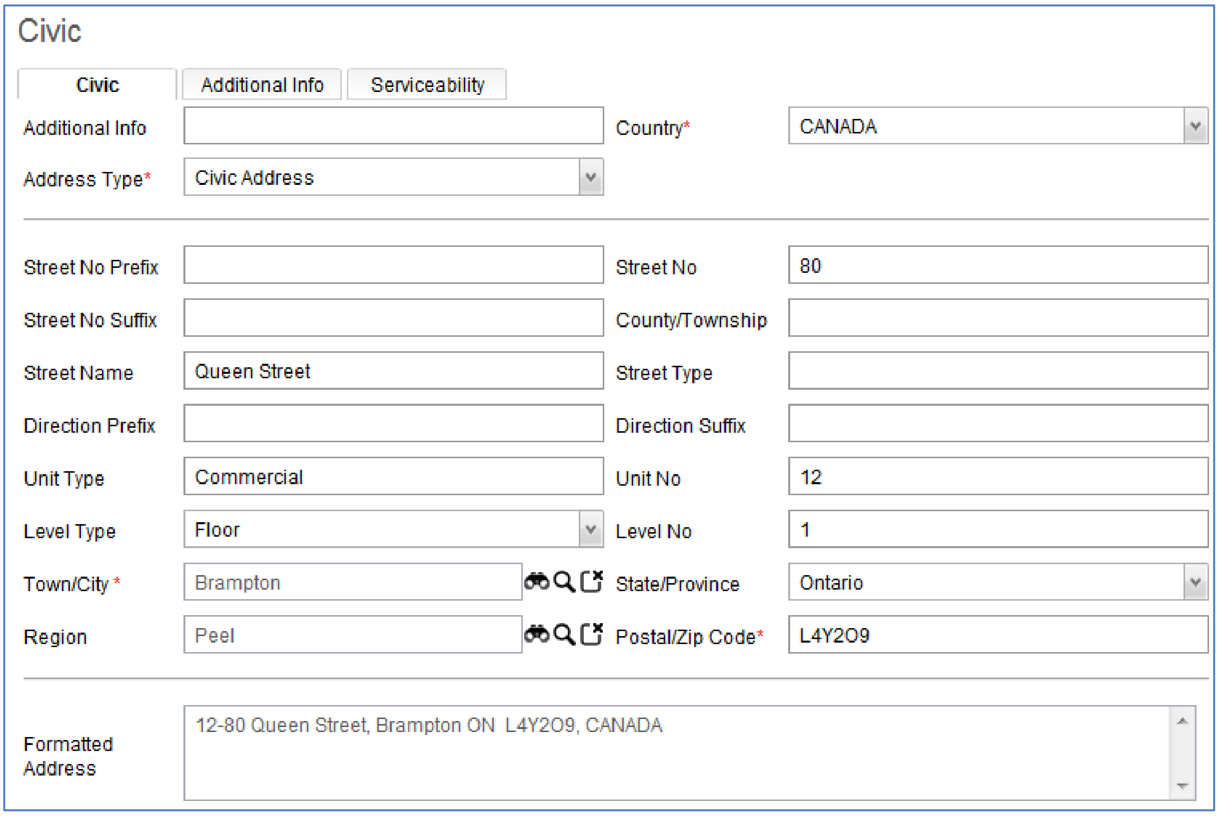

Figure 38 Civic address

This following is description of fields to available for this address type:

Field	Description
Street no	This field indicates the street number (for example, 30, 5858, and so on).
Street no Prefix	This field indicates the street number prefix.
Street no Suffix	This field indicates the street number suffix.
Street Name	This field denotes the name of the street.
Street Type	This field denotes the type of the street (for example, avenue, circle, street, and so on).
Direction Prefix	This field indicates the direction prefix.
Direction Suffix	This field indicates the direction prefix.
Unit Type	This field indicates the type of the unit (for example, commercial, residential, attached, semi-detached or and so on).
Unit No	This field indicates the unit number.
Level Type	This field denotes the type of level (for example, floor, basement, penthouse, and so on. You can select from the per-populated drop-down list.
Level No	This field indicates the number of the level.
Additional Info	This field allows you to add any additional information related to the address (for example, a landmark or intersection information).
Town/ City	This field indicates the town or street name (for example, Brampton). The drop-down list of this field is populated according to the country selected in the **County** field.

Field	Description
County/Township	This field denotes the name of the county or township (for example, Dufferin county, Huron county and so on).
State/ Province	This field indicates the name of the province or state (for example, Ontario, Quebec and so on). The drop-down list of this field is populated according to the country selected in the **County** field.
Region	This field denotes the region related to the address or city (for example, Peel Region).
Postal/Zip Code	This field indicates the postal code of the address.
Formatted Address.	This field displays the full address in a formatted order.

4.4.6.2 Rural Route

Clicking Rural Route option from the drop-down list of Address Type field displays the Rural Route page.

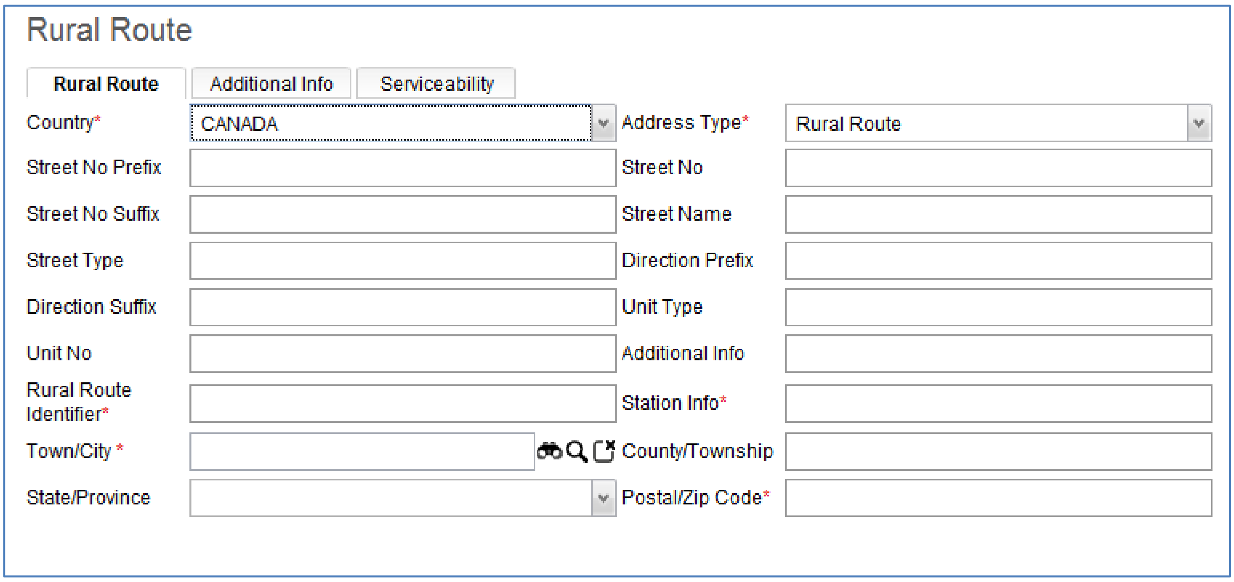

Figure 39 Rural Route

This form contains the same fields as the Civic Address form, with the following additional fields:

Field	Description
Rural Route Identifier	This field denotes the rural route (RR) address. This address converts the mailing addresses of rural customers from a rural route address to the rural municipal address assigned to their property (for example, RR 6).
Station Info	This field indicates the station information that is used to direct the mail to the proper postal installation (for example, STN Main).

4.4.6.3 PO Box

Clicking PO Box option from the drop-down list of Address Type field displays the PO Box page.

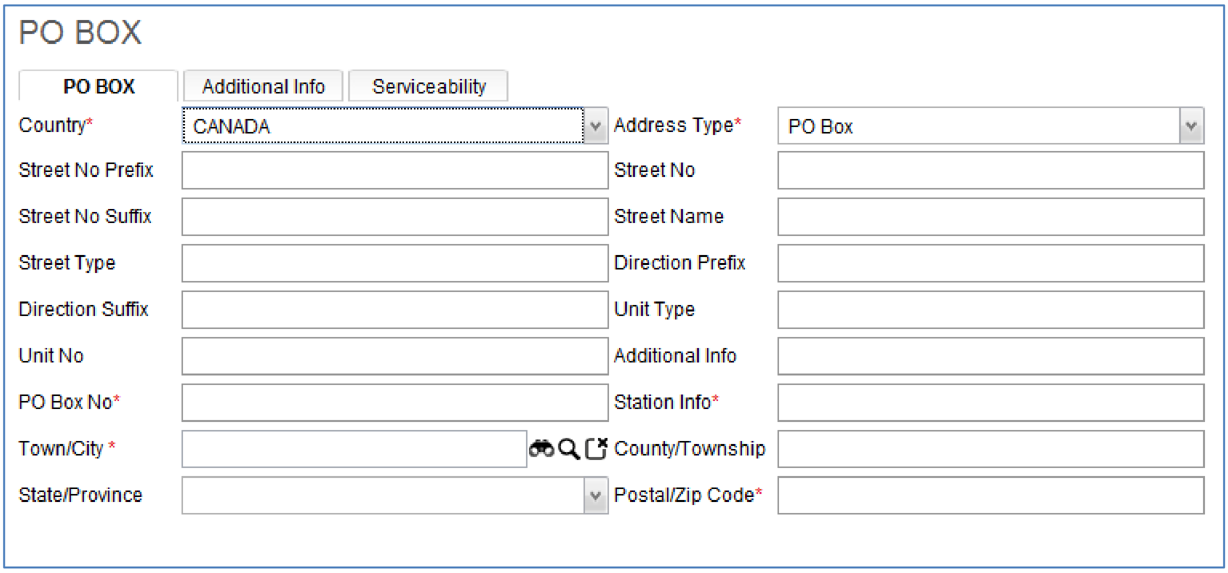

Figure 40 PO Box

This form contains the same fields as the Civic Address form, with the following additional fields:

Field	Description
PO Box No	This field denotes the number of addressable lockable box located on the premises of a post office station (for example, 4001).

4.4.6.4 Latitude/Longitude

Clicking Latitude/ Longitude option from the drop-down list of Address Type field displays the Lat/Long page. The address type is defined by:

- Latitude (N/S)
- Longitude (E/W)

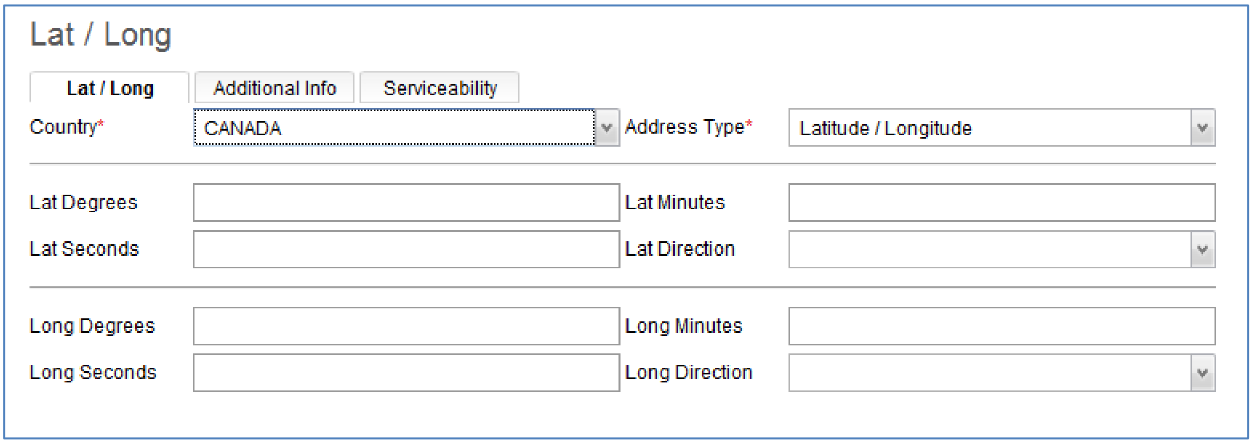

Figure 41 Latitude/Longitude Address Type

In addition to the fields described in the Civic Address page, the following additional fields are available for this type of address:

Field	Description
Lat Degrees	This field denotes the latitude degree information.
Lat Minutes	This field indicates the latitude minutes information.
Lat Seconds	This field denotes the latitude seconds information.
Lat Direction	This field indicates the direction of latitude.
Long Degrees	This field denotes the longitude degree information.
Long Minutes	This field indicates the longitude minutes information.
Long Seconds	This field denotes the longitude seconds information.
Long direction	This field indicates the longitude direction.

4.4.6.5 General Delivery

Clicking General Delivery option from the drop-down list of Address Type field displays the General Delivery page. The fields of this address type have been described in the Civic Address section.

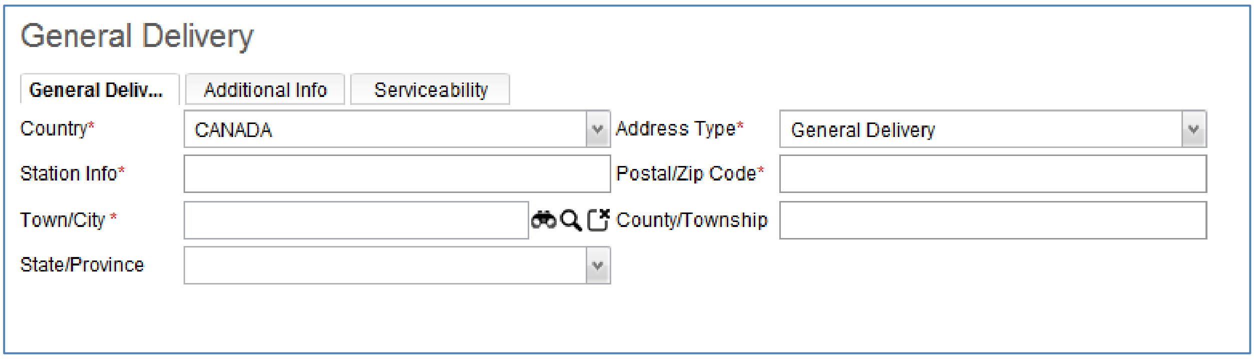

Figure 42 General Delivery Address

4.4.6.6 Other

Clicking Other option from the drop-down list of Address Type field displays the **Other** page. This option provides the ability to add custom address.

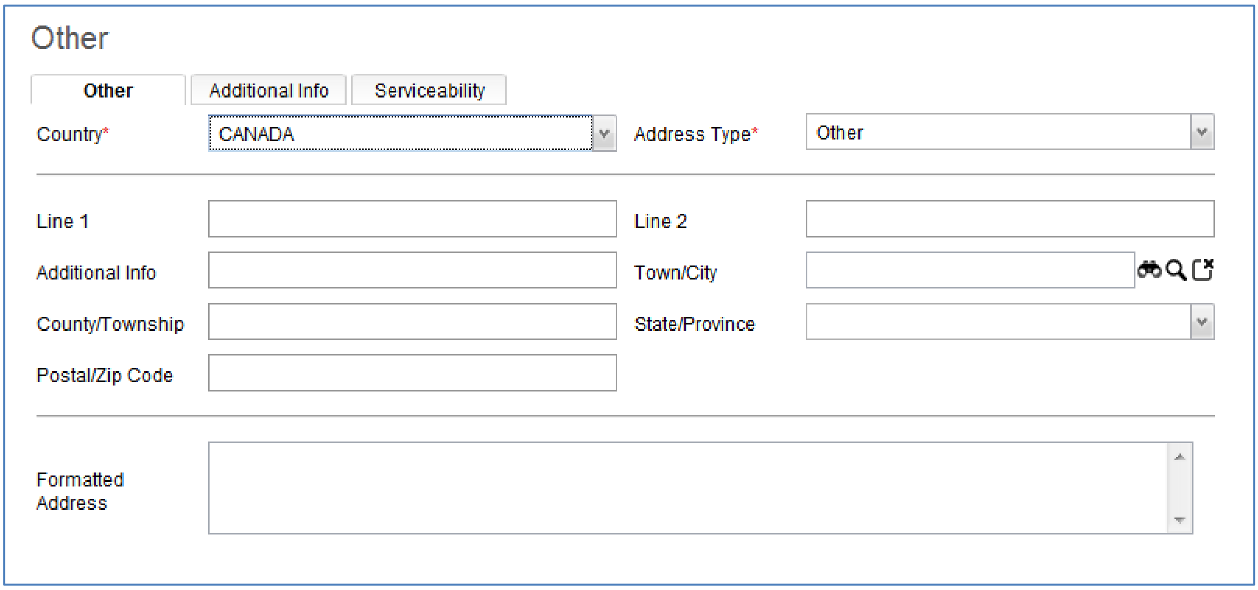

Figure 43 Other address

This page contains the same fields as the Civic Address, with the following additional fields:

Field	Description
Line 1	You can enter customized address information in this field (for example, you can enter the street name and number).
Line 2	You can enter customized address information in this field (for example, you can enter the street name prefix, suffix, and so on)
Additional Info	This field allows you to enter the additional information related to the address, such as special instructions or notes.

4.4.7 Add a Town or City

The **Town/City** field of different address types requires that you select from a list of towns and cities. Clicking the finder icon ( ) next to the **Town/City** field displays the City Finder page appears. From this page you can search, select, and add a city record. By selecting a city, the values for the **Province/State** and **County** (if applicable) fields are populated.

If the required city does not exist in the defined list, follow these steps to add a new one:

1. Click the **NEW** button from the City Finder page, which displays the New City dialog.

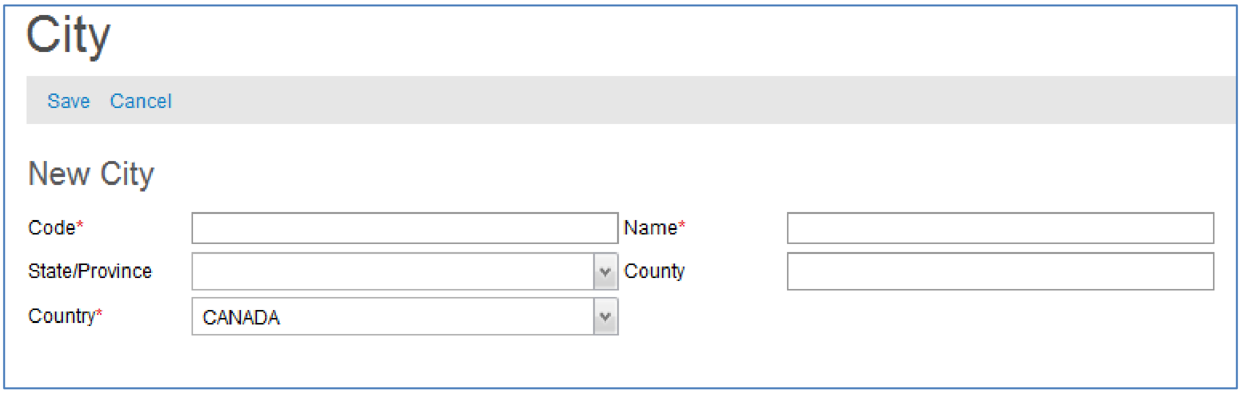

Figure 44 New City dialog

The following fields are available for this page:

Field	Description
Code	This field indicated the internal city code.
Name	This field denotes the name of the city that is also used forth UI label.
State/ Province	This field allows you to select the province or state for the city. The drop-down list of this field is dependent on value selected for the Country field.
County	This field indicates the name of the county the city belongs to.
Country	This field denotes the name of the country.

2. Enter the information for the **Code** and **Name** fields.
3. Select the country from the **Country** field and then select the value for the **State / Province** field.
4. Click the **Save** button and then click the close button to exit the dialog. The new city is available from City Finder page.

4.4.8 Add a Region

The **Region** field of different address types requires that you select from a list of regions. Clicking the finder icon ( ) next to this field displays the region search and results page. The following steps describes how to add a new region:

1. Click the **Add** button from the region results page; the New Region dialog appears.

   The following fields are available for this page:

Field	Description
Region Code	This field indicated the internal region code.
Region Name	This field indicates the name of the region.
City	This field denotes the name of the city related to the region.

2. Enter the information in the **Region Code** and **Region Name** fields.

Note: The city field is prepopulated based on the city selection**.** You can also select a different city from the drop-down list.

3. Click the **Save** button and then click the **Close** button. The new region is available from region results page.

4.4.9 Configure External Identifier

To configure an external identifier for an address, follow these steps:

1. Either follow the steps described in the add new address section to create a new address, or select an existing address from the search results.

2. Click the **Additional Info** tab.

   Note: The external identifier button is not available once you have saved the address. If you have selected an existing address, click the **Edit** button first.

3. Click the **External Identifiers** button; the External Address Identifier Results page appears.

   Note: From this page you can add new external identifiers, export the results and can change the view.

4. Click the **New** button; the New External Address Identifier page displays with the following fields:

Field	Description
Address Master ID	This field denotes the formatted saved address.
ID	This field indicated the internal ID for the selected address.
External System	This field denotes the name of the external system. Click the drop-down list to select one.
External Identifier	This field refers to the external Identifier object that is used to capture information about the identification of an address by an external system.

5. Enter or select the information for the External System and External Identifier fields.

6. Click the **Save** button; the confirmation message displays that the External Identifier has been saved successfully.

7. Click the **Close** button to go back to the External Address Identifier Results page. The newly added external identifier appears in the results list.

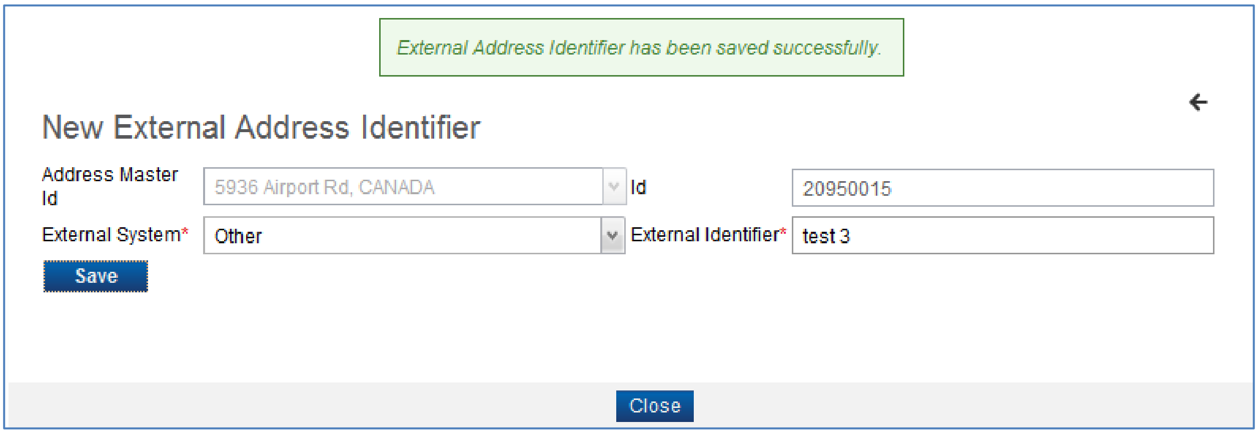

Figure 45 New external address identifier

5 CIM and SID

SID carries entities such as Party, Party Role, Contact Medium, PartyRoleContactMedium, and so on. Each entity has its own set of relationships.

These relationships are rationalized into the following patterns:

SID Entity	Pattern
Customer	Party where Role = Customer
PartyRoleContactMedium	Party Contact Medium where Type = Address
Contact Medium	Party Contact Medium where Type = Address
Party	Customer
Party Name	Customer Name
Party Role	Individual or Organization
Customer Account	Account
AccountContactMedium	Account’s Contacts and Addresses

6 Appendix A - User Profile Management

6.1 Management Application

The Management application is a Web application that offers a set of tools to manage users, workgroups, user privileges, and calendars. This application is integrated with the CIM application to provide the following features and functionality:

- Manage calendars and calendar template
- Create holidays and set standard working hours
- Create and maintain system privileges. These are the access rights that are tied to application functions

- Create and manage all system end-users, including passwords. A “bulk edit” option is available
- Manage workgroups
- Assign user access rights to the applications through privileges
- Organizational hierarchy chart
- Set security and profile providers in systems:
    - Where single sign-on is required
    - Out-of-the-box: LDAP, SMB, and others

6.2 Log in to the User Profile Management Application

Users wanting to log in to this tool require the *User Profile Administration* privilege. An out-of-the-box user has been created with administrative access: *upadmin*

6.3 Creating Calendars

Calendars define holidays and your default work week, and are based on the Calendar template.

To create a new calendar, click **Create** > **Calendars** from the menu bar in User Profile Management. The new calendar instantiates the current year. To instantiate future years, click the **Calendar** object and click **New Year**.

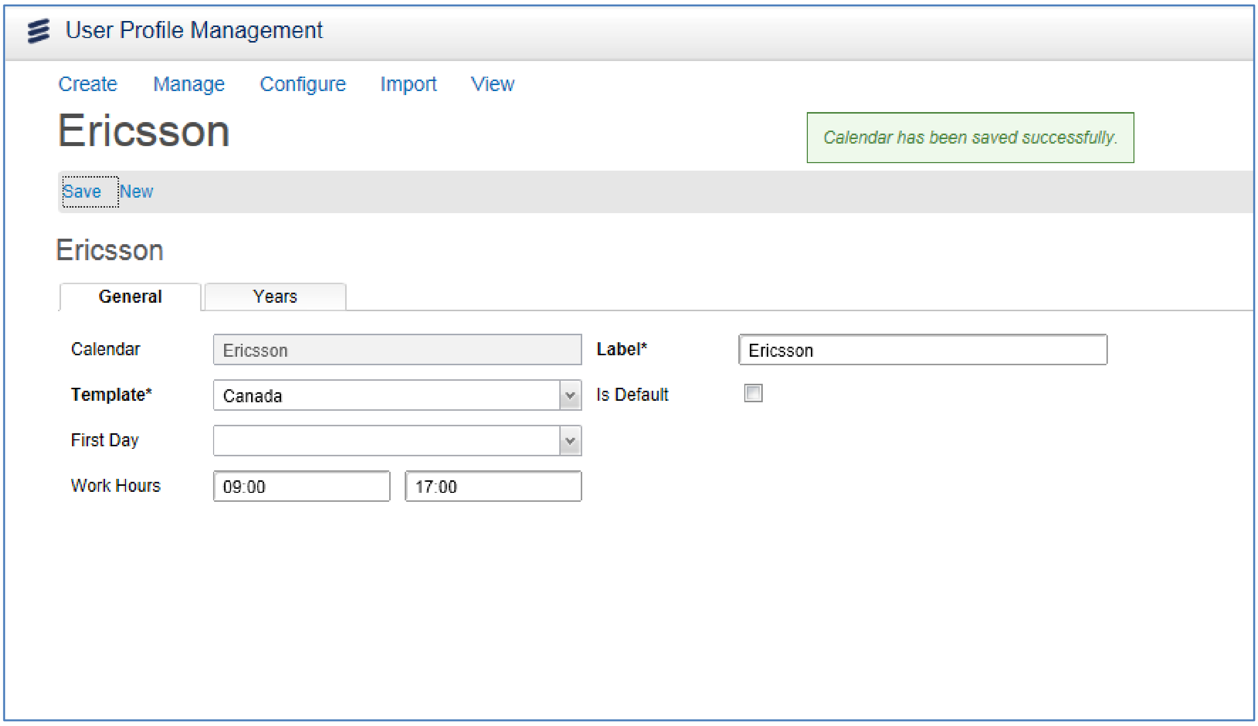

Figure 46 Calendar

6.3.1 Adding Special Calendar Days

To add a special day to an existing calendar, do the following:

1. Select the desired year, enter the day for which you would like to create the special case, and then select **Add**.
2. In the Day Properties dialog, set the **Type** field and enter a **Description** and working Hours.

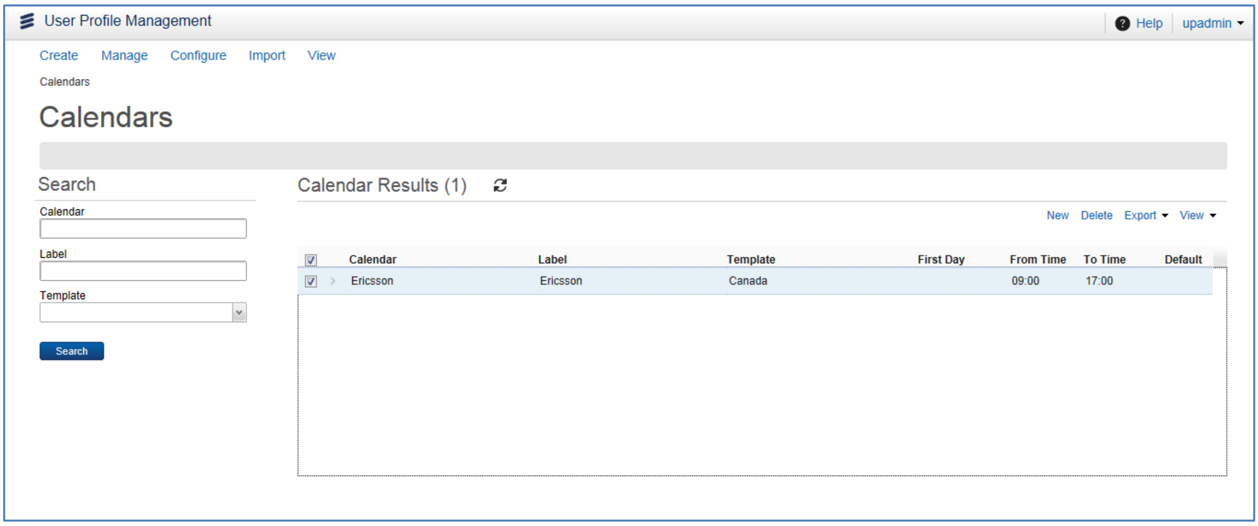

Figure 47 Add Special Day

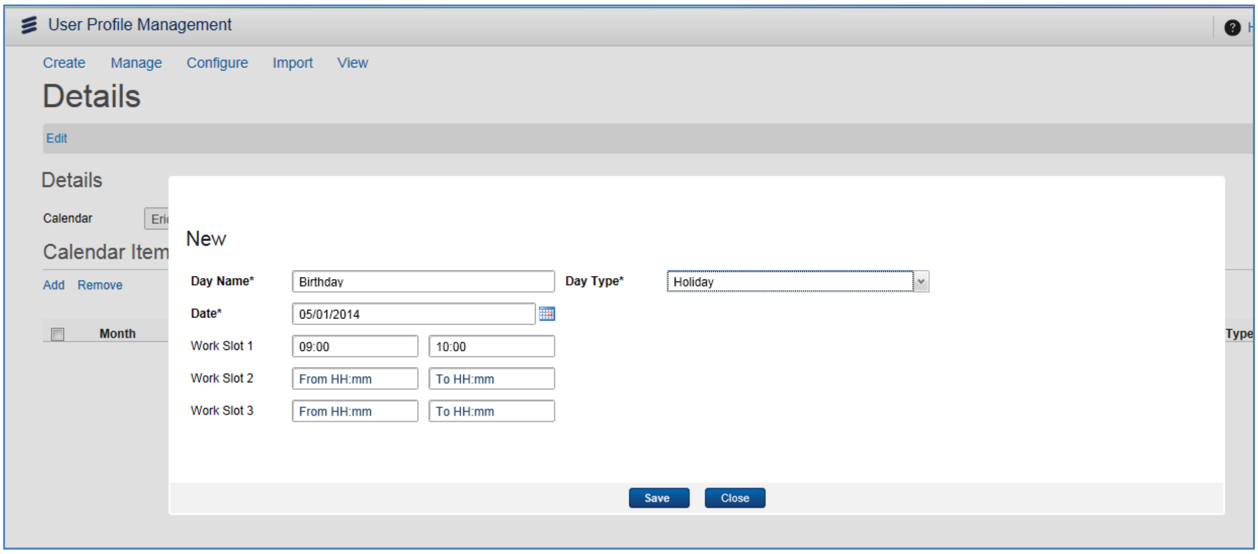

Figure 48 Details of day

3. Click the **Save Day** button.

6.3.2 Setting the Default Calendar

If your Application involves processes, it is mandatory to set one of your calendars as the **Default calendar**.

To select the default calendar, do the following:

1 Select Calendar from manage menu.

2 Click set as default option in the bottom.

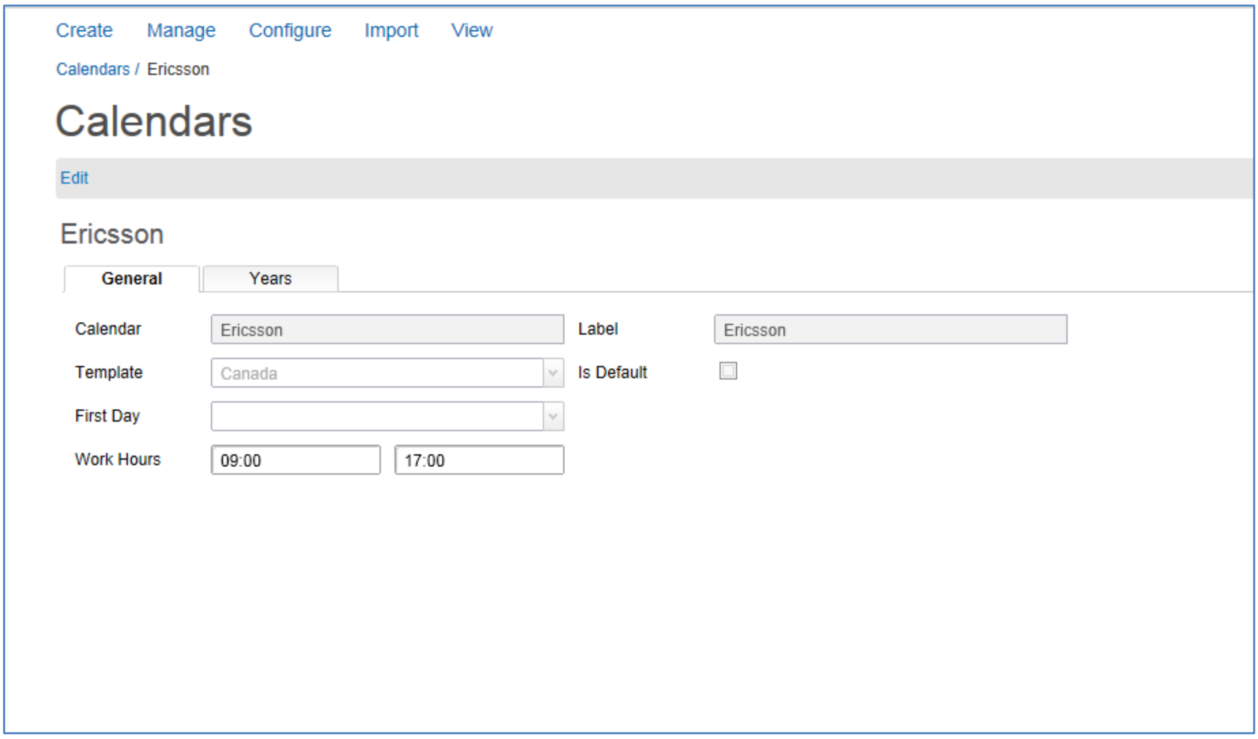

Figure 49 Setting Default Calendar

6.3.3 Creating a Calendar Template

Calendar templates define a set of annually recurring holidays. Some holiday dates are fixed based on a recurrence rule; others may require a special script to calculate the date.

To create a new calendar template, do the following:

1 From the **Create** menu, click **Calendar Templates**.

2 Provide the desired name and then click **Save**. Then, click the **Add** button to define your holidays.

3 Provide the **Name** and **Recurrence pattern**.

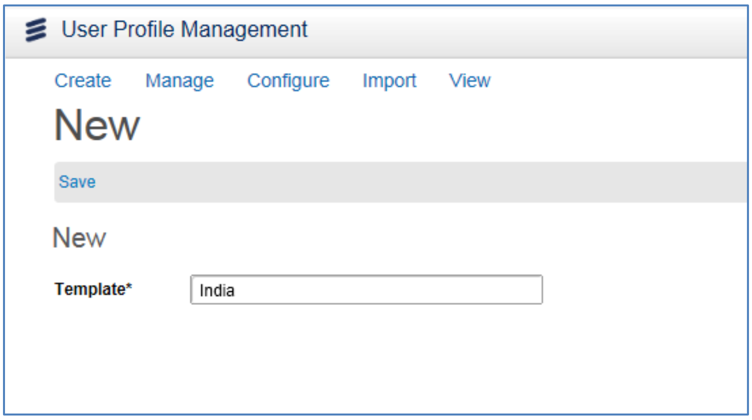

Figure 50 Create Calendar Template

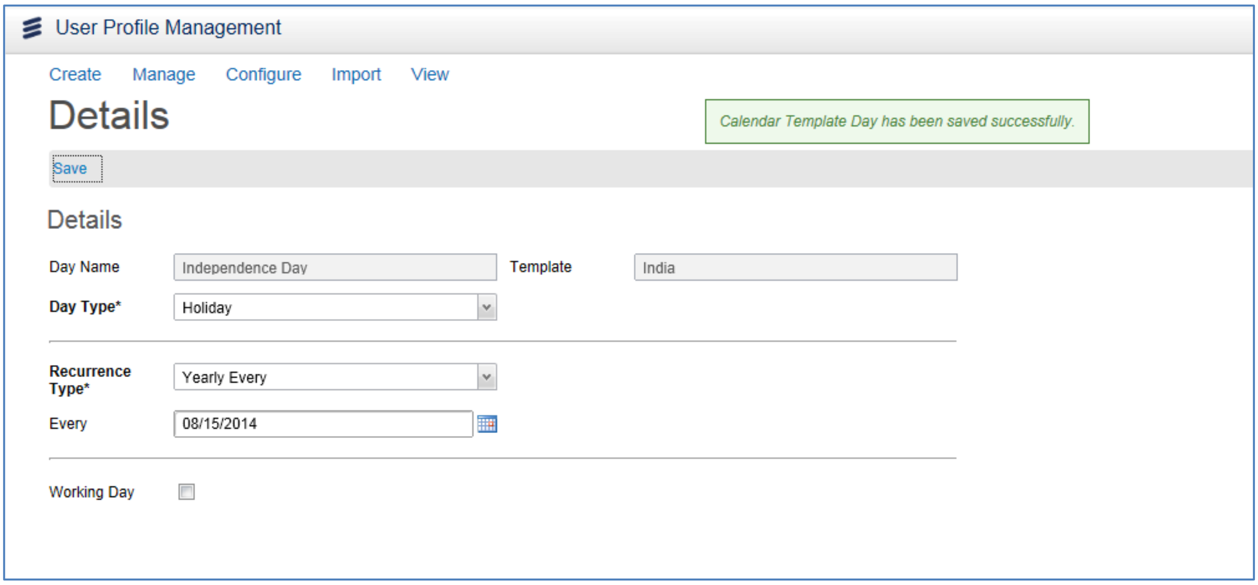

Figure 51 Define calendar Template

4 Click the **Save** button to save your changes.

6.4 Creating Privileges

Privileges are used to relate users in a workgroup to a set of application actions. To create a privilege, click **Create** > **Privileges** from the menu bar. The Privilege list is imported into your ORDER schema metadata, and then related to Application actions (for example, Create Order, View Report).

You can assign the selected privilege to a group using the **Groups** tab.

Note: A privilege assigned to a group cannot be deleted until it is unassigned from the group.

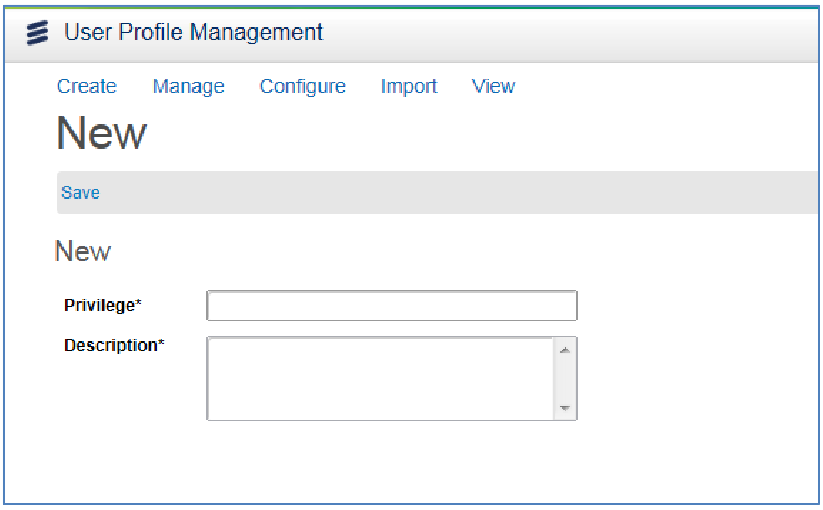

Figure 52 Create Privilege

6.4.1 Descriptions of Default System Privileges

The default system privileges are those with a red outline .

Privilege	Description	Category
Add Shared Favorites	Add shared favorites.	**Admin App**
Administration App	Administration application access (required for all administration users).	**Admin App**
Delete Shared Favorites	Delete shared favorites.	**Admin App**
Process Manager Administrator	Process management functions (start, stop, resume, suspend, etc).	**Admin App**
Runtime Administrator	Runtime framework and PE administration (view event log, status, etc).	**Admin App**
Set Process Priority	Modify process priority.	**Admin App**
User Profile Administrator	User Profile Administrator Application access.	**Admin App**
Worklist Administrator	Perform worklist management functions (assign, reassign and modify tasks).	**Admin App**
Delegate Task	Delegate assigned tasks to other users.	*Task Distribution*
Get Available	Get next shared task. Without this privilege the user will not be able to get shared tasks from the unassigned tasks queue.	*Task Distribution*
Group Manager	Delegate unassigned tasks.	*Task Distribution*
Return Task	Return a worklist task back to the Queue	*Task Distribution*
Take on Task	Take tasks from other users.	*Task Distribution*
Workgroup Select	Take shared task from the list of unassigned tasks. Without this privilege only the next unassigned task may be taken.	*Task Distribution*
Show Error Details	Shows the actual detailed error message instead of the generic error message	Runtime User
ConceptWave API Access	Access to ConceptWave APIs (used by external systems).	Runtime User
Everyone	Standard privilege that is automatically assigned to each user.	Runtime User

Figure 53 Default System Privileges

6.5 Creating Users

Users are end-users who log in to and use your application. To create a new user, do the following:

1. Click **Create** > **Users** from the menu bar, and then click the **Add** button.

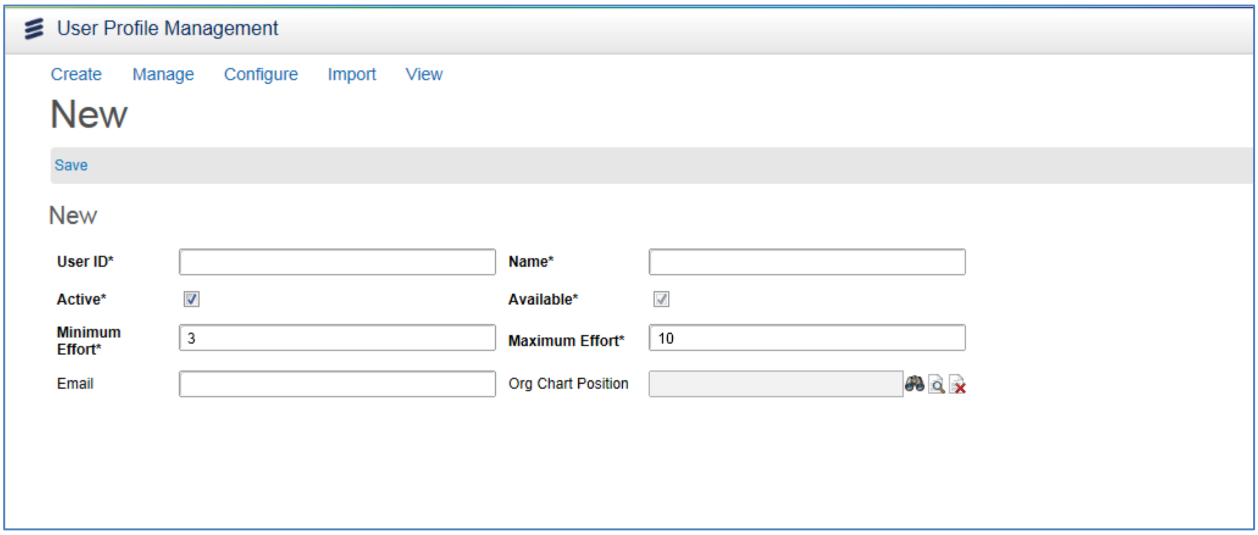

Figure 54 Creating Users

2. Fill in the fields.

Notes:

- The default password for a new user is the same as his user **ID** (for example, super/super).
- You can assign the selected user to a group using the **Groups** tab.

3 Click the **Save** button.

Refresh

Right-clicking the **Users** folder and selecting **Refresh** allows you to refresh the users list in accordance with the database. Refreshing is recommended, as objects may have been added, removed, or changed by another user, or the objects may have been altered due to changes made in objects in other folders.

Synchronize

Right-clicking the **Users** folder and selecting **Synchronize** allows you to reset all users and passwords, synchronizing them with the database. The security provider checks for each user object under the **Users** folder to see if the corresponding Oracle user exists in the database and, if not, creates the Oracle user.

6.6 Resetting Password and Editing Users

To reset a user's password, click the user that you want to edit and click Edit and select **Reset Password**. In the **New Password** field, reset the user's password.

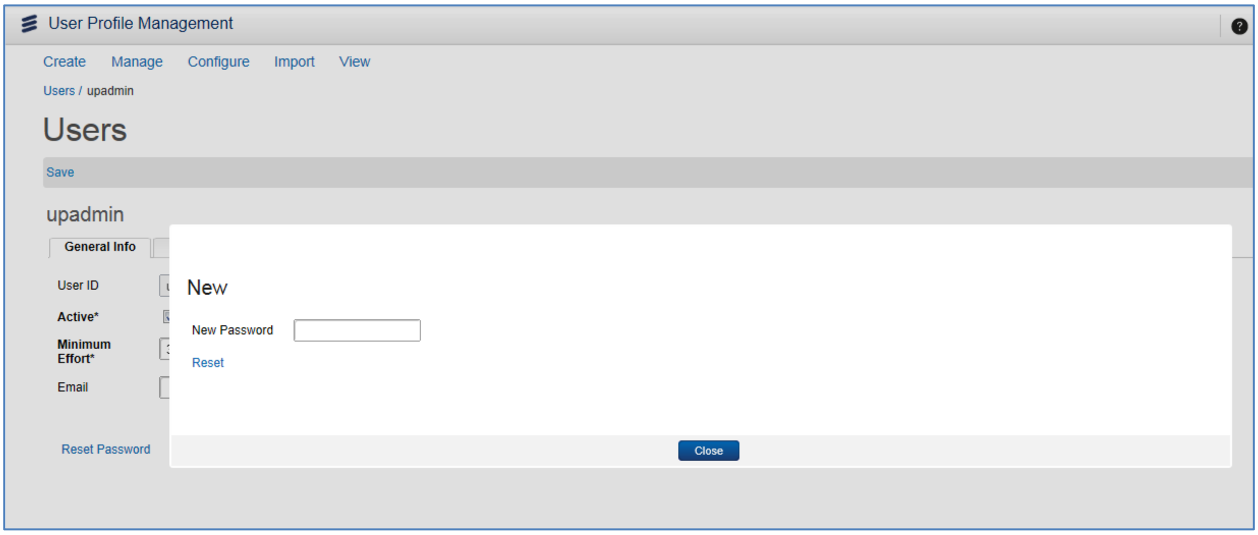

Figure 55 Reset Password

6.7 Creating Workgroups

Workgroups relate a set of users with the same set of privileges.

To create a workgroup, do the following:

1 Click **Create** > **Groups** from the menu bar, and then click the **Add** button.

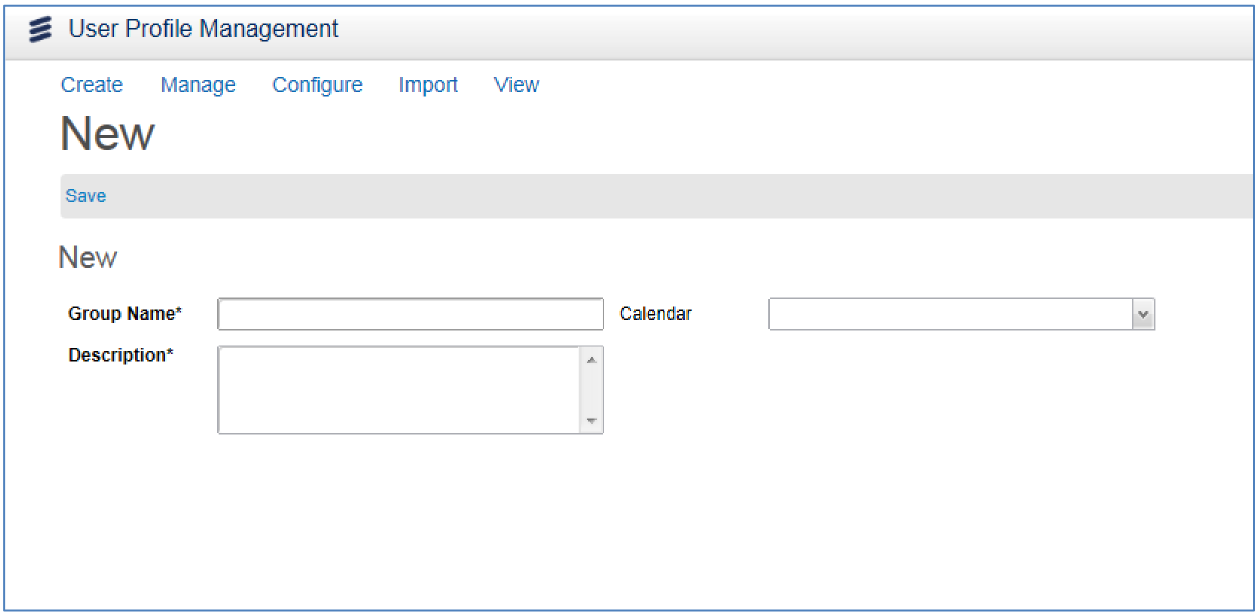

Figure 56 Group

2 Fill in the fields.

3 Both **Users** and **Privileges** can be assigned to this group by clicking the tabs and specifying them.

4 If no Calendar is specified, the default calendar is assumed.

5 Click the Sa**ve** button.

6.8 Changing the Security Provider

Oracle is the default security provider. Any user added or deleted in the User Profile Administration tool is also added or dropped as an Oracle user. The security provider can be changed for single sign-on.

To change the provider, do the following:

1 Click **Configure > Security Providers** from the menu bar.

Note: Users must still exist in both systems, as password authentication will be done externally.

2 Click the **Security Provider** drop-down menu to change your security provider.

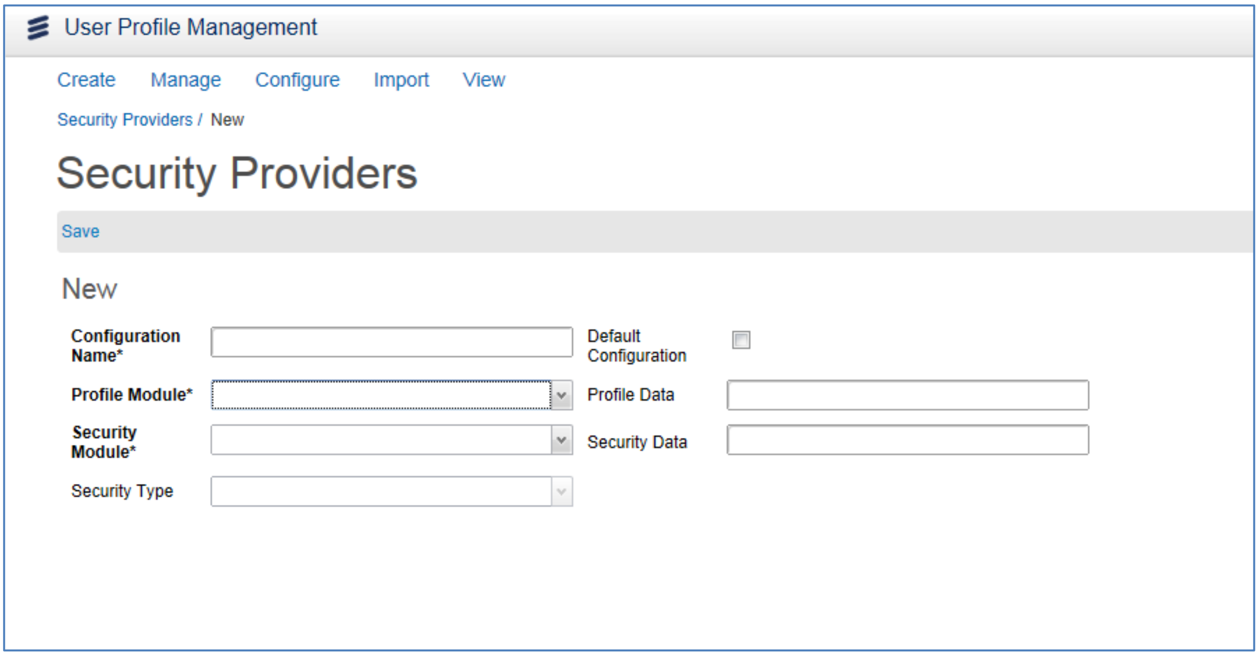

Figure 57 Change Security Provider

3 Click the **Save** button to save your changes.

6.9 Web UPAdmin (Thin Client)

The Web-based User Profile Manager is available from the System Administration application. Log in as *upadmin/upadmin*, and then select **Administration**.

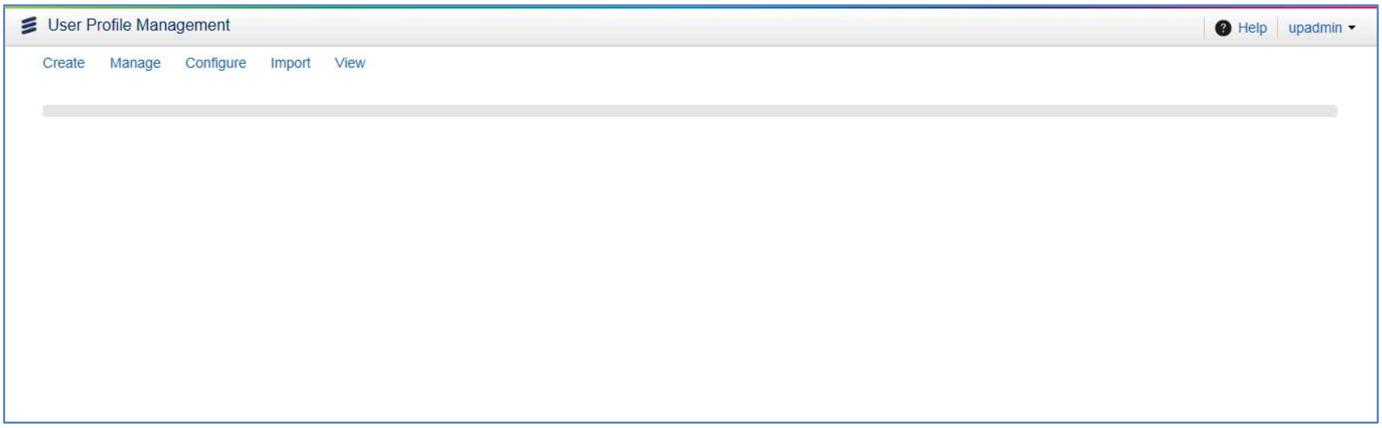

Figure 58 Administration

6.10 Create an Organizational Chart

To create an organizational chart, do the following:

1 Select the **Organizational Chart** node and click the **Add** icon.

2 Enter a **Name** (for example, **Toronto**) and click the **Save** icon.

3 To create a sub-node, expand the new node, select **Sub-Tree**, and click the **Add** icon.

4 Click the **Search** icon after adding your sub-node to refresh the tree.

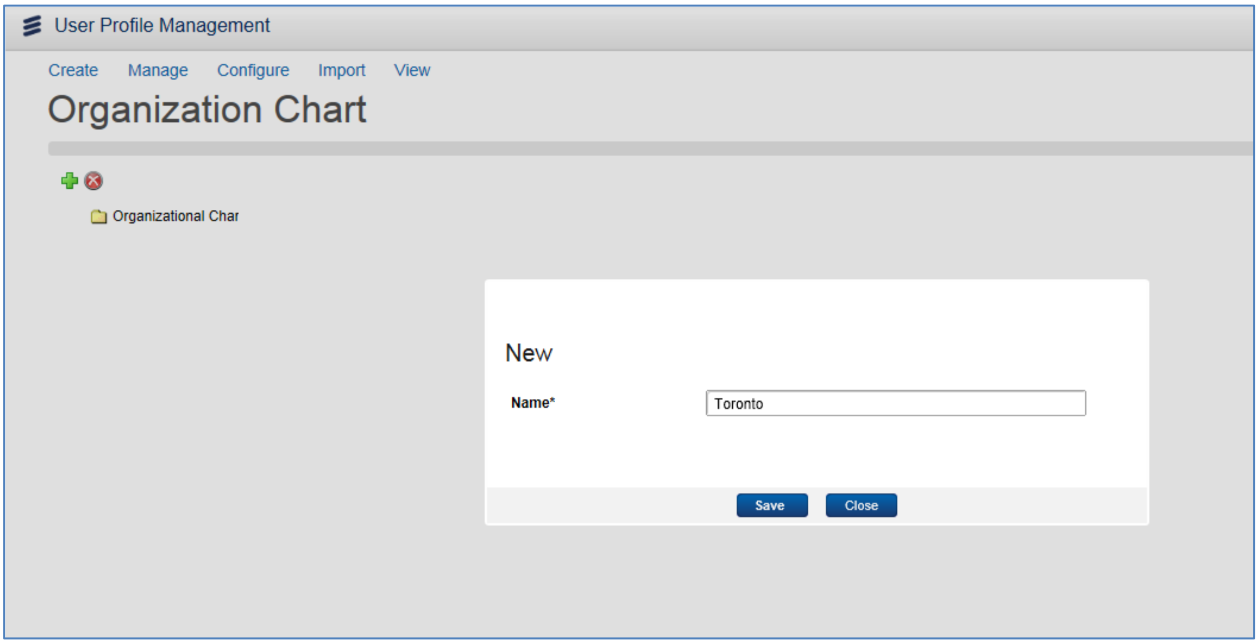

Figure 59 Organizational Chart

6.11 Add a User into the Organizational Chart

To assign a user a position in the hierarchy, do the following:

1 Select the user that you want to add.

2 Click the **node** from the available option.

3 Click **Add.**

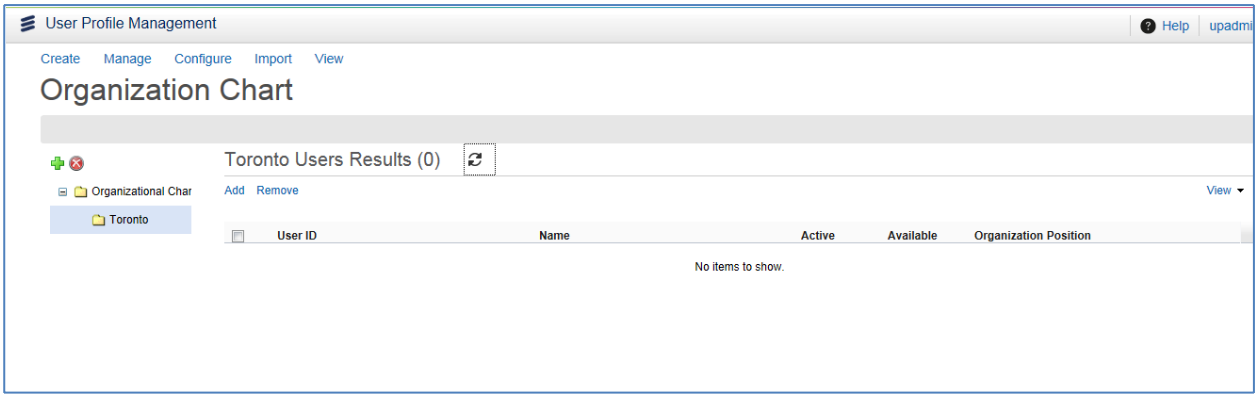

Figure 60 Add User

7 Acronyms

CIM – Configuration Information Management

SID - Shared Information/Data

8 Reference List

The following is a list of documentation for reference:

- *CIM Configuration Guide*
- *Velocity Studio User Guide*
- *Velocity Studio Configuration Guide*
- *Velocity Studio System Administration User Guide*

9 Trademarks

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