

Aura Administrator's Guide

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For Windows



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TABLE OF CONTENTS

CHAPTER 1. INTRODUCTION TO AURA ADMINISTRATION

What is Aura?	8
A Typical Aura Process	8
Aura Architecture	10
Customer Information System	11
Address Quality Software	11
Output File	11
Windows Service	11
Sagent DataFlow	11
OpenEDMS	12
Databases and Tables	12
Aura Browser Interface	14
Your Custom Load Process	14
DataFlow Plans	14
Logfile_To_Aura	15
CASS_Logfile_to_Aura	15
coa_Mail360Db_to_Aura	15
Nixie_Mail360Db_to_Aura	16
C1P_Logfile_To_Aura	16
LoadProcessfromTemp	16
Update_Aura_And_OEDMS	16
OEDMS_To_Aura	17
Aura Report Plans	18
SchedulePlans	18

CHAPTER 2. CONFIGURATION

Introduction	21
Header & Footer	21
Resetting Aura Header and Footer	22
User IDs and Passwords	22
Default User ID and Password	22
Password Policy Settings	22
Input	24
Input File Naming Convention	24
Default Input File Layout	24
Populating the Input File with Address Owner IDs	27
Modifying Input File Layout	27
File Monitoring	28
Integrating Aura with MAIL360	29
CASS Input from Code1Plus file	31
Aura Data Mapping	31
Actions	33
Standard Actions	33
Specifying an Automatic Consent Period	35
Creating Custom Actions	35

Assigning Actions to Return Codes	36
Default Actions Assignments	36
Output	41
Finding Approved Addresses	41
Finding Rejected Addresses	41
Process Table Columns	42
Plans	44
Creating a Plan	44
Scheduling a Plan	44
Modifying the Schedule of a Plan	44
Meta Field Management	46
Adding a New Field	46
Email Management	47
License Management	48
Activating a License File	48
Workflow Management	49
Workflow	49
Workflow Designer	49
OpenEDMS Desktop Introduction	50
OpenEDMS Desktop Login	50
Workflow Template Creation	51
Workflow Template Management	58
CHAPTER 3. USER ACCOUNTS AND DOMAINS	
Introduction	60
Managing Users in Aura	60
Creating a User	60
Editing User Information	61
Assigning LDAP Users to Multiple Domains	62
Deleting a User	62
Changing Passwords	63
Domains	64
Creating Domains	64
Assigning a User to a Domain	64
Modifying a Domain	65
Enabling and Disabling Domains	66
CHAPTER 4. MONITORING AND LOGS	
Viewing Aura Service Status	68
Logging	68
Aura Log File	68
Database Transaction Logs	68
CHAPTER 5. TROUBLESHOOTING	
File Monitoring Service (FMS) Log Issues	72
Unable to connect to the DFS agent. Is it running?	72
Error while beginning the execution for the step 'Load to Process Table'	72
Error while logging into the repository	72
Error while processing the data for the step 'VeriMoveFile'	73
Transport-level error when sending the request to the server	73

Aura Issues	74
User unable to log in.....	74
Reports take a long time to run.....	74
Records missing from the review tab.....	74
Unable to launch the Aura from a Windows 2008 server	75
Error when logging into Aura.....	75
“Invalid Date” error after creating new domain.....	75
User unable to reconfigure CASS/ACS configuration from the Aura UI.....	75
Database Issues	76
Plan runs successfully but no records appear in the Review tab. . . .	76
The number of records in the log file is different from the number in the report.....	76
Blank Xform.....	76
The size of the Catalina logs in Tomcat is increasing	76
The size of the Aura database log file is increasing.....	77



CHAPTER 1

Introduction to Aura Administration

What is Aura?	8
A Typical Aura Process	8
Aura Architecture	10
Customer Information System	11
Address Quality Software	11
Output File	11
Windows Service	11
Sagent DataFlow	11
Databases and Tables	12
OpenEDMS	12
Aura Browser Interface	14
Your Custom Load Process	14
DataFlow Plans	14
Logfile_To_Aura	15
CASS_Logfile_to_Aura	15
coa_Mail360Db_to_Aura	15
Nixie_Mail360Db_to_Aura	16
C1P_Logfile_To_Aura	16
LoadProcessfromTemp	16
Update_Aura_And_OEDMS	16
OEDMS_To_Aura	17
Aura Report Plans	18
SchedulePlans	18

What is Aura?

Aura enables you to control changes to your address data by routing address changes to different workflows based on the return codes from the address quality software and information from other systems. Address changes that require review by an address owner are routed to that person for their review. Address changes that you want to always accept or always reject are automatically marked as accepted or rejected. Approved changes are then applied to your customer information system through your own custom process.

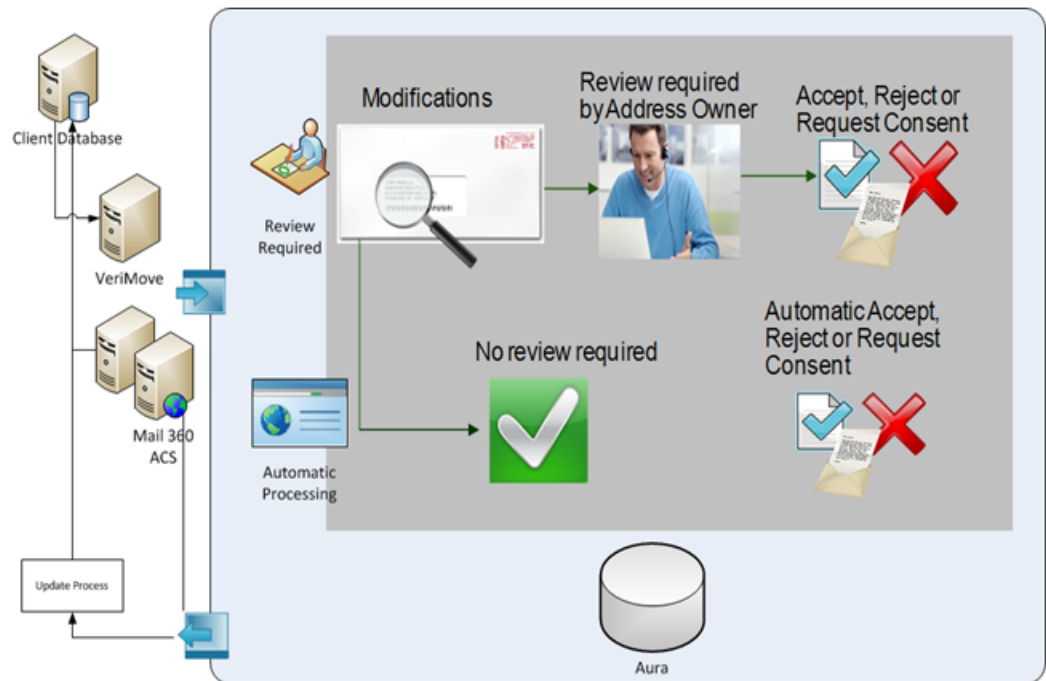
Aura acts as a gate between your address validation software and your customer information system, allowing you to control which address changes are applied to your customer information system. Aura features include:

- Queries other data systems for information beyond what is provided by the address quality software
- Works with VeriMove, CODE-1 Plus, Finalist, and CDQ Platform
- Supports custom workflows [NOT IN v1.0]
- Provides a browser-based interface
- Supports multiple forms of interaction, including physical mail, e-mail, and web using Pitney Bowes Software's CCM product suite
- Logs all activity related to an address
- Reports progress and history of addresses, workflows, and the system
- Produces a list of approved address changes that are ready for your custom process to load into your customer information system

A Typical Aura Process

Aura works with your address data quality software (such as VeriMove, CODE-1 Plus or Finalist) by controlling which address modifications are made to your customer information system. You set the types of address changes you want to automatically accept, automatically reject, or forward for manual review by authorized personnel.

Aura can be customized to support your specific workflow. This diagram shows a typical address update process:

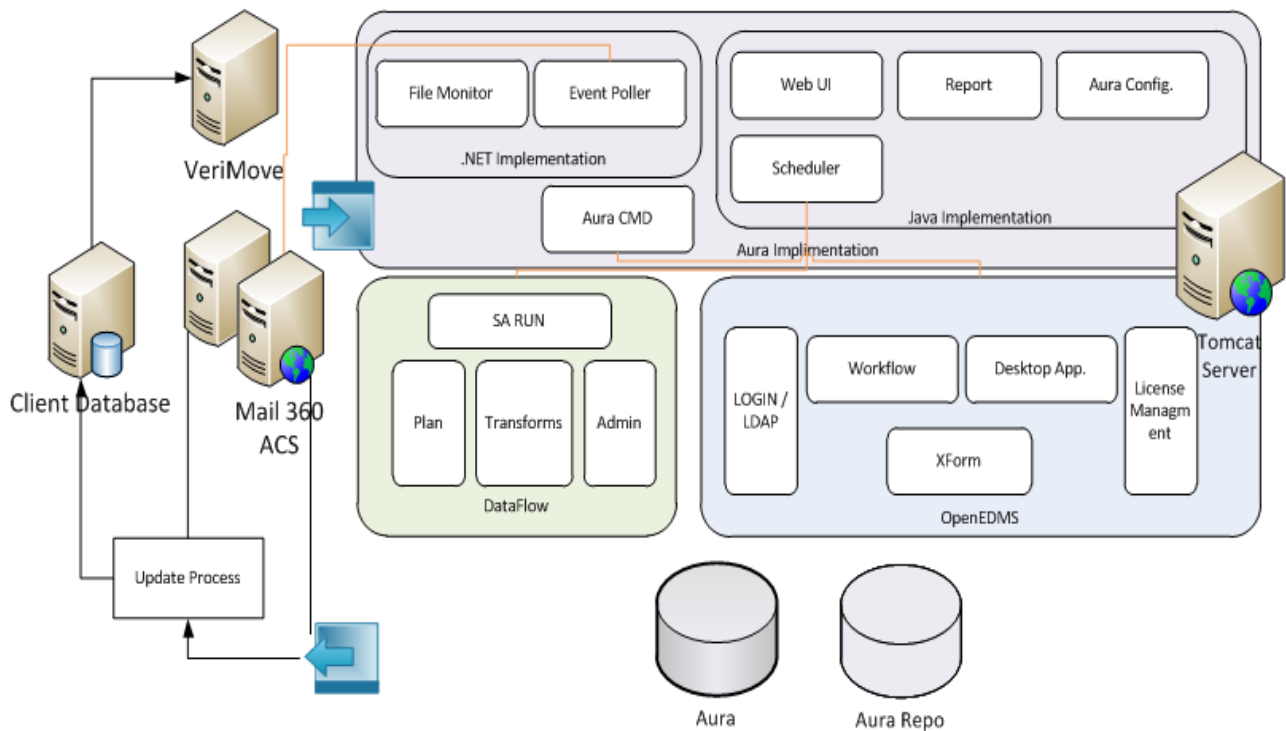


In this process, the address quality software reads address data in your customer information system and attempts to locate the address in the postal data. For example, VeriMove can identify individuals who have moved and provide you their new address. For details on this portion of the process, see the documentation for your address quality software.

The address quality software includes return codes with each address. Return codes indicate how the address was modified (the street name, the postal code, and so on) and any address elements that could not be validated. Using these return codes, the Aura administrator configures Aura to route addresses to address owners for approval. Approved addresses are placed in an output file that can be loaded back into the customer information system. Rejected addresses can be placed in a separate file for further research.

Aura Architecture

The Aura system uses two underlying products: Sagent DataFlow and OpenEDMS. In Aura, these products are pre-configured to determine which addresses to automatically accept, which to automatically reject, and which require approval. The approval workflow uses email notifications and a web interface for address owners. You can customize the underlying products as needed to match your technical and business needs. This diagram shows a typical architecture:



Each of these components is described in detail below.

- [Customer Information System](#)
- [Address Quality Software](#)
- [Output File](#)
- [Windows Service](#)
- [Sagent DataFlow](#)
- [OpenEDMS](#)
- [Databases and Tables](#)
- [Aura Browser Interface](#)
- [Your Custom Load Process](#)

Customer Information System

The customer information system is the database of address data you want to process. The address quality software reads addresses from this system and processes them.

Address Quality Software

Address quality software is the software you use to make sure that your address data conforms to postal regulations. For example, your address quality software could be VeriMove, which identifies addresses of people who have moved, then attempts to update the address.

Output File

The output file from the address quality software is a flat file that contains addresses changed by the software and return codes indicating the type of changes. These return codes are critical because Aura uses them to determine which addresses to send for review by an address owner, which to automatically accept, and which to automatically reject.

You must configure your address data quality software (VeriMove, CODE-1 Plus, or Finalist) to create the output file using a specific layout. For information about this file, see [“Input” on page 24](#).

Windows Service

Aura uses a Windows service to monitor the designated folder for output from the address quality software. When the service finds a new output file in the folder, it triggers the first Sagent DataFlow plan Logfile_To_Aura. The name of the Windows service is Aura FMS.

Sagent DataFlow

Sagent DataFlow is an extract, transform, load (ETL) product that extracts information from multiple sources, optimizes information for decision support, and delivers it to users in an appropriate format. Aura includes a pre-configured DataFlow installation that supports Aura processing. DataFlow performs these functions in the Aura system:

- Moves address records from the address quality software output file into the Aura database
- Creates required fields in each record and removes unnecessary fields
- Triggers the Aura workflows that notify address owners about addresses that require their review
- Prepares approved address records that you can load back into your customer information system (you are responsible for creating the process for loading updated addresses into your customer information system)

These functions are accomplished using DataFlow plans. For more information on these plans, see “[DataFlow Plans](#)” on page 14.

OpenEDMS

Aura uses OpenEDMS for workflow management for addresses that require review by address owners. OpenEDMS handles email notification to address owners to let them know that addresses require their review. It also handles the presentation of the web interface used by address owners to review addresses as well as user management.

Databases and Tables

Aura uses three databases to process addresses. These are SQL Server databases. For a listing of supported database systems, see the *Aura Installation Guide*.

Aura

The Aura database contains the address records, Aura settings, address owner IDs. You will need to interact with this database to load approved addresses from Aura into your customer information system. It contains the following tables:

- **address_action**—This table contains an internal value used to represent each action in other tables. You should not need to interact with this table.
- **address_owner**—Not currently used.
- **address_source**—This table contains an ID for each address software application used with Aura. Currently, there is only one application supported by Aura (VeriMove) so this table does not need to be modified.
- **Address_stage**— This table contains all the review & request consent records which are also stored in the workflow tables for further processing.
- **address_status**—This table lists the statuses used in the Aura system. You should not need to interact with this table.

- **aura_audit**—This audit table contains the most recent action taken on each address record.
- **CASS_Data_conf**—This table contains the current status of the ACS/CASS scheduler.
- **Check_Request_Consent**—This table contains the active/inactive status of the records. The Scheduler Plan checks this table for the Request Consent Records status and runs only if the Records status is found active in this table.
- **city**—This table lists a numeric code for each city in the U.S. which is used internally by Aura. You should not need to interact with this table.
- **coder**—This table lists the address quality software (VeriMove, CODE-1 Plus, or Finalist) tools that Aura interacts with, including the directory to monitor for address files. You specify the directory using the Aura website.
- **coder_rule**—This table contains the action to take for each return code from the address quality software (VeriMove, CODE-1 Plus, or Finalist).
- **country**—This table contains a code for each country supported by Aura. You should not need to interact with this table.
- **Mail360_Credentials**—This table contains the credentials of the Mail360 database for Aura.
- **Metatable**—This table contains newly added Metafields in Aura Xform.
- **Messages**—This table contains messages regarding steps users need to take to enable a feature to function properly. This table can be customized in that you can edit existing messages to include the information you want. For instance, you can add a contact name or extension number to a message so users know who to call in the event they experience a problem.
- **process**—This table contains each address processed by Aura, including the current status of each address. For more information, see [“Process Table Columns” on page 42](#).
- **SchedulerDetails**—This table contains the scheduler plan settings.
- **state**—This table contains code for each state or territory supported by Aura. You should not need to interact with this table.
- **temp_process**—This table is for temporary storage of process table records. It helps increase performance.

Aura_repo

This is the Sagent Dataflow database. You should not need to interact with this database.

Aura Browser Interface

Aura has a browser-based interface that address owners use to accept or reject address modifications requiring their approval. Aura administrators use it to assign actions to return codes, manage users, check the status of Aura services, and more.

Your Custom Load Process

Aura does not handle the process of loading updated addresses back into your customer information system because this process is specific to your company. Aura makes approved address easy to process by assigning the “approved” status to each address record in the Process table that is ready to load.

DataFlow Plans

A DataFlow plan is a multi-step process that connects actions into a single process. Plans can have multiple sources and targets. To view and edit Aura plans, use Sagent Design Studio.

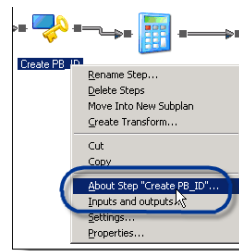
DataFlow uses the following Aura plans:

- [Logfile_To_Aura](#)
- [CASS_Logfile_to_Aura](#)
- [coa_Mail360Db_to_Aura](#)
- [Nixie_Mail360Db_to_Aura](#)
- [C1P_Logfile_To_Aura](#)

NOTE: The above mentioned plans are the first plans for different coders. The below mentioned plans, which are common for all coders, are executed after the execution of first plan.

- [LoadProcessfromTemp](#)
- [Update_Aura_And_OEDMS](#)
- [OEDMS_To_Aura](#)

Each plan is described below. For information about each step in the plans, open the plan in Design Studio, right-click the step, and select **About**. For example:



Logfile_To_Aura

This plan takes output from the address quality software (VeriMove, CODE-1 Plus, or Finalist), creates keys, adds fields necessary for Aura processing, then loads the records into the process table and the audit table in the Aura database. The Logfile_To_Aura plan is triggered by the Windows service (Aura FMS) that monitors the specified folder. When the output file from the address quality software appears in the folder, the service triggers this plan.

CASS_Logfile_to_Aura

This plan fetches the CASS data from the MAIL360 database using the stored procedure created in the MAIL360 database. After that, the plan creates keys, adds fields necessary for Aura processing, and then loads the records into the Temp_process table and the temp_Aura_audit table in the Aura database. All the BYPASS records are loaded into the Aura_Audit table. If records already exist in the Process table, then the updated_date field is updated in the Process table and the Address_stage table. This plan is triggered by the Windows Scheduler, which is scheduled by the user from Aura UI.

coa_Mail360Db_to_Aura

This plan fetches the ACS-COA data from the MAIL360 database using the stored procedure created in the MAIL360 database. After that, the plan creates keys, adds the fields necessary for Aura processing, and then loads the records into the Temp_process table and the temp_Aura_audit table in the Aura database. All the BYPASS records are loaded into the Aura_Audit table. If records already exist in the Process table, then the updated_date field is updated in the Process table and the Address_stage table. This plan is triggered by the Windows Scheduler, which is scheduled by the user from Aura UI.

Nixie_Mail360Db_to_Aura

This plan fetches the ACS-Nixie data from the MAIL360 database using the stored procedure created in the MAIL360 database. After that, the plan creates keys, adds the fields necessary for Aura processing, and then loads the records into the Temp_process table and the temp_Aura_audit table in the Aura database. All the BYPASS records are loaded into the Aura_Audit table. If records already exist in the Process table, then the updated_date field is updated in the Process table and the Address_stage table. This plan is triggered by the Windows Scheduler, which is scheduled by the user from Aura UI. This plan is run after the execution of coa_Mail360DB_To_Aura plan.

C1P_Logfile_To_Aura

This plan takes output from the Address Quality Software (e.g. C1P: code1plus), creates keys, adds fields necessary for Aura processing, and then loads the records into the Temp_process table and the Temp_Aura_Audit table in the Aura database. All the BYPASS records are loaded into the Aura_Audit table. If records already exist in the Process table, then the updated_date field is updated in the Process table and the Address_stage table. This plan is triggered by the Windows service (Aura FMS) that monitors the specified folder. When the output file from the Address Quality Software appears in the folder, the service triggers this plan.

LoadProcessfromTemp

This plan first deletes the duplicate records from the Temp_process table and the Temp_Aura_Audit table, and then loads the data from Temp_process to Process table and Temp_Aura_Audit to Aura_Audit table.

Update_Aura_And_OEDMS

This plan takes data from the Aura process table, reads the return code for each address, and determines the appropriate action to take for the address (Automatic Approval, Automatic Reject, and Review). For information about workflows, see “Actions” on page 33. Depending on the action required for the address, one of the following events happens:

- **Automatic Approval and Automatic Reject**—The plan updates the address_status and update_date fields in the Process table. For the address_status field, the value is set to either 1002 (Approved) or 1003 (Rejected). The update_date is set to the date and time that the plan processed the address, in the format mm/dd/yyyy h:mm:ss tt.

- **Review**—The plan updates the **address_status** field to 1004 (Requesting Approval) and **update_date** to the date and time of the execution of the plan, then loads the address to the Address_stage table in the database. Aura then notifies the address owners that their approval is needed. For more information, see “OpenEDMS” on page 12.
- **Bypass**—The plan bypasses records with this return code and does not show them on the **Reviewed Addresses** page.

OEDMS_To_Aura

This plan updates the Process table with approved addresses, rejected addresses, and address changes that require the addressee’s consent. It updates these fields in the Process table:

- update_date
- address_status
- new_address1
- new_address2
- new_city
- new_phone
- new_state
- new_zip

This plan applies only to address records that had a status of “Review” from the Update_Aura_And_OEDMS plan. This plan is triggered by activity in Aura, such as an address owner accepting or rejecting an address.

Aura Report Plans

This folder contains the plans, which are used for creating reports. Following are the plans:

- Account Status Report

This plan is used to display the details and status of a particular Customer ID or Account ID based on the different coders & domains.

- Address Owner Summary Report

This plan is used to display the status wise count of records for all the owners of a domain.

SchedulePlans

This folder contains the plans that are used for scheduling purpose. The plans that appear in this folder are populated in the **Schedule Plans** drop-down on 'Scheduler' screen.

Scheduler uses the following Aura plans:

- ACS_Schedular

This plan is used for creating scheduler for ACS.

- CASS_Schedular

This plan is used to create scheduler for CASS.

- Scheduler_Plan

This plan is used for creating the scheduler for Auto Approve all the request consent records, which cross the Automatic Consent days set by the user. It took all the request consent records from address_stage table and check the difference between the updated_date and the current date & if the difference is more than the number of days set into the automatic consent then Auto Approve those records. Delete those records from Address_Stage table And update status & updated date and some more other fields into the Process table as well as keep log into the Aura_Audit table.

See [Plans](#) for more information on how to create and schedule a plan.

CHAPTER 2

Configuration

Introduction	21
Header & Footer	21
Resetting Aura Header and Footer	22
User IDs and Passwords	22
Password Policy Settings	22
Default User ID and Password	22
Input	24
Input File Naming Convention	24
Default Input File Layout	24
Populating the Input File with Address Owner IDs	27
Modifying Input File Layout	27
File Monitoring	28
Integrating Aura with MAIL360	29
CASS Input from Code1Plus file	31
Aura Data Mapping	31
Actions	33
Standard Actions	33
Automatic Approval	33
Automatic Reject	33
Review	34
Request Consent	34
Specifying an Automatic Consent Period	35
Creating Custom Actions	35
Assigning Actions to Return Codes	36
Default Actions Assignments	36
Output	41
Finding Approved Addresses	41
Finding Rejected Addresses	41
Process Table Columns	42
Plans	44
Creating a Plan	44
Scheduling a Plan	44
Modifying the Schedule of a Plan	44
Meta Field Management	46
Adding a New Field	46
Email Management	47
License Management	48
Activating a License File	48
Workflow Management	49
Workflow	49

Workflow Designer	49
OpenEDMS Desktop Introduction	50
OpenEDMS Desktop Login	50
Workflow Template Creation	51
Workflow Template Management	58

Introduction

Aura configuration involves specifying input, actions, and output. Input configuration settings tell Aura where to look for your address file and how the file is laid out. Action configuration settings tell Aura what to do with each address record based on the address's return code from the address quality software. Output configuration settings tell Aura where to put the approved address changes.

There are two tools you use to configure Aura. First, the Aura web interface allows you to access the most commonly used configuration options, such as setting an input location and actions. To access these configuration options you must log in using an account that has administrator rights. Advanced configuration is done through the Sagent DataFlow application, which allows you to modify the input file layout and other settings.

NOTE: With the exception of modifying the input file layout, you should not modify settings in Sagent DataFlow unless you have a strong working knowledge of Sagent DataFlow.

Header & Footer

You can configure Aura to display a desired graphic, which can be the logo of your company, as the header and some text information as the footer on the UI. To do this:

1. Using a web browser, log in to Aura using a user ID with administrative rights.
2. Click the **Admin** tab.
3. Click **Configure Header & Footer**.
4. On the Header Footer Configuration screen:
 - a. Browse the graphic that you want to display as the header (top-left corner of the UI). The graphic must be a “jpg” or “gif” extension file.
 - b. Enter text that you want to display as the footer (below the copyright information on the UI)
5. Click **OK**.

Resetting Aura Header and Footer

After configuring Aura to display some graphic as header and some text as footer, you may wish to reset the Aura logo as the header. To do so:

1. Using a web browser, log in to Aura using “System” user credentials.
2. Click the **Admin** tab.
3. Click **Configure Header & Footer**.
4. On the Header Footer Configuration screen:
 - a. Browse the “”<Tomcat Install Path>\webapps\edms\images2” folder and select the Aura logo named “Aura_45x200.jpg” to display as the header.
 - b. Enter text that you want to display as the footer (below the copyright information on the UI)
5. Click **OK**.

User IDs and Passwords

Default User ID and Password

Aura ships with a default administrator account. Use this account to log on to the Aura website.

User name: system

Password: aura

Password Policy Settings

Aura allows the users to define their own password policy settings, such as the number of days after which the password will expire and the format of the password. To configure the password policy settings:

1. Using a web browser, log in to Aura using a user ID with administrative rights.
2. Click the **Admin** tab.
3. Click **Password Policy Settings**.

4. On the Password Policy Settings screen, fill in the following fields with the appropriate credentials and information:
 - **Password Expires after** - The number of days after which the password will expire. This must be a whole number value. Entering “0” means the password will never expire.
 - **Keep Password History for** - The number of previous passwords that Aura will remember and keep as history. Again, this must be a whole number value. Entering “0” means the password history will not be kept.
 - **Message for Password History** - The information related to the password history.
 - **Password Policy Regular Expression** - The format of the password in terms of a regular expression. For more information related to regular expression, mouse hover the **Help** link, a tool tip containing examples along with descriptions of regular expressions will display.
 - **Message for Regular Expression** - The information related to the regular expression.
5. Click **OK**.

Input

Aura takes as input the output file produced by your address quality software (VeriMove, CODE-1 Plus, Finalist, or Mail 360). Aura monitors the directory you specify and when it finds a new output file it begins processing. Aura checks for the presence of a file every 10 seconds. Once Aura finishes processing the file it moves the file to the Archive subfolder.

If an input file cannot be processed, it is moved to the Error subfolder. If this happens, refer to the Aura log file for a description of the error. For more information on the Aura log file, see [“Logging” on page 68](#).

Input File Naming Convention

The file used as input to Aura must be named using this naming convention:

`<Domain>~<WorkflowName>~FileName.txt`

For example,

`AcmeMail~NightlyRun~FileName.txt`

Default Input File Layout

The Aura input file contains the address changes that require approval before being updated to the source system. This is the output file from your address quality software. The following table shows the required fields when Aura is used with VeriMove. These are the fields used by Aura but are not necessarily all the fields that exist in the VeriMove output file. Aura ignores any fields it does not need. If your

VeriMove output file does not use this layout you must configure Aura to work with the layout of your file. For instructions, see [“Modifying Input File Layout”](#) on page 27.

Table 1: Default Input File Layout for VeriMove (Part 1 of 3)

Field Name	Description	Default Start Position	Default End Position	Default Length
last_name	The addressee’s last name. For example, “Smith”: John Smith 4750 Walnut St APT 409 Boulder, CO 80301-2532	26	55	30
first_name	The addressee’s first name. For example, “John”: John Smith 4750 Walnut St APT 409 Boulder, CO 80301-2532	343	382	40
old_address1	The first address line of the original address. For example, “4750 Walnut St”: John Smith 4750 Walnut St APT 409 Boulder, CO 80301-2532	383	452	70
old_address2	The second address line of the original address. For example, “APT 409”: John Smith 4750 Walnut St APT 409 Boulder, CO 80301-2532	453	522	70
old_city	The city of the original address. For example, “Boulder”: John Smith 4750 Walnut St APT 409 Boulder , CO 80301-2532	523	550	28
old_state	The postal abbreviation for the state of the original address. For example, “CO”: John Smith 4750 Walnut St APT 409 Boulder, CO 80301-2532	551	552	2

Table 1: Default Input File Layout for VeriMove (Part 2 of 3)

Field Name	Description	Default Start Position	Default End Position	Default Length
old_zip	The five-digit portion of the ZIP Code of the original address. For example, "80301": John Smith 4750 Walnut St APT 409 Boulder, CO 80301 -2532	553	557	5
new_address1	The first address line of the new address. For example, "1071 Maple Ln": John Smith 1071 Maple Ln Batavia, IL 60510-1135	622	691	70
new_city	The city of the new address. For example, "Batavia": John Smith 1071 Maple Ln Batavia , IL 60510-1135	692	719	28
new_state	The postal abbreviation of the new state. For example, "IL": John Smith 1071 Maple Ln Batavia, IL 60510-1135	720	721	2
new_zip	The new five-digit ZIP code. For example, "60510": John Smith 1071 Maple Ln Batavia, IL 60510 -1135	740	744	5
movetype	The type of move that has taken place. For Verimove records only. F Family B Business I Individual	749	749	1
code	The NCOA ^{Link} return code for the address. This code indicates the results of VeriMove processing. For a list of return codes, see the <i>VeriMove Reference Guide</i> .	751	752	2

Table 1: Default Input File Layout for VeriMove (Part 3 of 3)

Field Name	Description	Default Start Position	Default End Position	Default Length
address_owner_id	The ID number of the person who must review this address change. For more information, see “Populating the Input File with Address Owner IDs” on page 27.	825	874	50
customer_id	A unique ID for this customer. For example, an account number.	875	881	7

Populating the Input File with Address Owner IDs

Each record in the input file must contain an address owner ID to associate the address with the person who may have to review the address change. Aura uses this ID to determine which Aura user’s queue to send the address to.

The Address_Owner_ID is same as login ID created in the Manage Users screen of Aura. This login ID must be included in the Aura input file in the address_owner_id field.

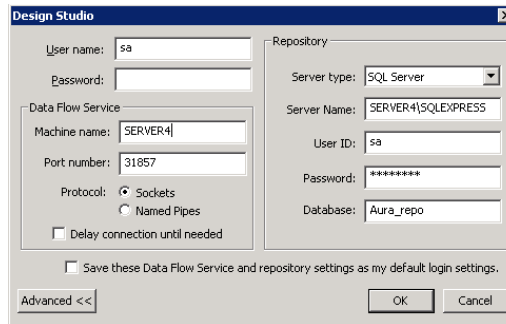
You must develop your own process for populating Aura input file, which is the output file from your address quality software, with this address owner ID. The address owner ID can be found in the Aura database, User_Contacts table, User_ID column. You can also view address owner IDs in the Aura web interface by clicking the **Admin** tab, then **Manage Users**. The address owner ID is shown in the User_ID column.

Modifying Input File Layout

If your input file differs from that shown in “Default Input File Layout” on page 24 you must modify Aura to accept the actual layout of your input file. To modify the input file layout,

1. On the Aura server, select **Start > All Programs > Sagent > Design Studio**.
2. On the log in window, click **Advanced**.

3. In the **Database** field, enter **Aura_repo**. Fill in the other fields with the appropriate credentials and server information.



4. In the lower left corner of the Design Studio window, click the **Plan** tab.
5. Double-click the **Logfile_To_Aura** plan. The plan is displayed on the canvas.
6. Double-click the **VeriMove File** step, which is the first step in the plan.
7. Click the **Columns** tab.
8. Modify the start position, end position, and output length as necessary to match your input file.

File Monitoring

Aura enables system users to specify the Hot Folder for processing Verimove/CASS Log files.

Specifying a Trigger (Hot) Folder

The trigger folder is the folder that Aura monitors for new output files from your address quality software (such as VeriMove, CODE-1 Plus, or Finalist). Aura checks this folder every 10 seconds for a new file. If it finds one it processes it then moves it to the Archive subfolder. If there is a problem processing a file it is moved to the Error subfolder.

The trigger folder can contain multiple files. If Aura finds multiple files in the folder, each file is processed and moved to the Archive subfolder.

NOTE: The trigger folder must be a local folder on the server running Aura. It cannot be a mapped drive or other remote location.

To specify a trigger folder,

1. Using a web browser, log in to Aura using a user ID with administrative rights.
2. Click the **Admin** tab.
3. Click **File Monitor**.
4. Click the coder, VeriMove or CASS, for which you want to specify a trigger folder.
5. Specify the directory that will contain the output file from the coder. The Browse button allows you to browse to a location you want. Note that only local drives are available for browsing.

Integrating Aura with MAIL360

Aura can be integrated with MAIL360 to receive two types of data records:

- [ACS \(Nixie/COA Records Ingestion in Aura\)](#)
- [CASS \(CASS Records Ingestion in Aura\)](#)

To integrate MAIL360, you need to configure MAIL360 credential settings. To do this:

1. Using a web browser, log in to Aura using a user ID with administrative rights.
2. Click the **Admin** tab.
3. Click **Mail360 Credentials setting**.
4. On the Mail360 Configuration Settings screen, fill in the following fields with the appropriate credentials and information.
 - **Database Instance**
 - **Database Host**
 - **Database Port**
 - **Database Name**
 - **Database User**
 - **Database Password**
5. Click **OK**.

ACS (Nixie/COA Records Ingestion in Aura)

Mail360 Data Manager is integrated with Aura by providing the Mail360 database credentials in the Mail360 Configuration Settings screen. This in turn creates the Mail360 database base views within Aura System for polling the ACS Nixie/COA Exception Records from Mail360 Data Manager to Aura system based on the user defined coder rules within Aura. The Scheduler can be set up to run periodically and extract the latest ACS events from Data Manager. The ACS events are stored in a flat file in a format that can be used by Aura.

Mail360 Data Manager produces an output file containing OneCode ACS™ address change information, which Aura, in turn, accepts as input. Aura uses the ACS return codes included in that information to determine whether an address update should be accepted, rejected, or submitted for review.

To configure Aura for ACS,

1. Using a web browser, log in to Aura using a user ID with administrative rights.
2. Click the **Admin** tab.
3. Click **ACS Configuration**.
4. On the ACS Configuration screen, fill in the following fields with the appropriate credentials and information.
 - **From Date**
 - **Domain**
 - **Workflow**
5. Click **OK**.

CASS (CASS Records Ingestion in Aura)

Mail360 Data Manager can be integrated with Aura by providing the Mail360 database credentials on the Mail360 Configuration Settings screen. This in turn creates the Mail360 database base views within Aura System for polling the CASS Exception Records from Mail360 Data Manager to Aura system based on the user defined coder rules within Aura. The Scheduler can be set up to run periodically and extract the latest CASS events from Data Manager. Aura uses the CASS return codes included in that information to determine whether an address update should be accepted, rejected, or submitted for review. To configure Aura for CASS,

1. Using a web browser, log in to Aura using a user ID with administrative rights.
2. Click the **Admin** tab.

3. Click **CASS Configuration**.
4. On the CASS Configuration screen, fill in the following fields with the appropriate credentials and information.
 - **From Date**
 - **Domain**
 - **Workflow**
5. Click **OK**.

CASS Input from Code1Plus file

CASS data can be ingested into Aura using Code1Plus Input file. This Input file needs to be placed in the Aura Hot Folder defined for CASS by the user. Based on the defined CASS business rules, the CASS Exception Records are ingested in Aura. For more information on how to specify the Hot Folder, see [“Specifying a Trigger \(Hot\) Folder” on page 28](#).

Aura uses the CASS return codes included in that information to determine whether an address update should be accepted, rejected, or submitted for review.

Aura Data Mapping

The table below provides the data mappings and output format for Aura.

Table 2: Source for Customer-Supplied Data

Data Item	Sample XML Location
name	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.name NOTE: This value might not be used. If there are any values for "personal name" the name field is built by combining prefix, firstname, lastname, and suffix (separated by spaces; blank fields are ignored.) If there are no personal name values but there is a value for "company name", the company name is used. If there are no values for personal name and no company name, the standard name is used.
addressLine1	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.parsedAddress.addressLine1
addressLine2	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.parsedAddress.addressLine2

Table 2: Source for Customer-Supplied Data

Data Item	Sample XML Location
city	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.parsedAddress.city
state	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.parsedAddress.state
zip	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.parsedAddress.zip5
eKey1	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.names(.PersonalName).prefix
prefix (personal name)	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.names(.PersonalName).prefix
firstName (personal name)	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.names(.PersonalName).firstName
lastName (personal name)	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.names(.PersonalName).lastName
suffix (personal name)	mailpieceEntry.outboundMailpiece.outboundEnterpriseData.outboundEnterpriseDataExtension_1.names(.PersonalName).suffix
companyName	not supported in current xml

Actions

Actions define how to handle each address. You assign an action to each result code returned by your address quality software (such as VeriMove, CODE-1 Plus, or Finalist). By specifying actions for each return code you can define which address changes to automatically accept, which to automatically reject, and which to forward to the address owner for approval.

Aura comes with four standard actions: Automatic Approval, Automatic Reject, Review, and Bypass. You can also define your own custom actions.

For more information, see:

- [Standard Actions](#)
- [Creating Custom Actions](#)

Standard Actions

Aura's standard actions cover the most common address update scenarios.

NOTE: These actions are defined by Sagent DataFlow plans. Do not modify these plan names in Sagent Dataflow. Doing so may cause Aura processing to fail.

Automatic Approval

The Automatic Approval action is for address changes that you want to apply to your customer information system without the need for approval from an address owner. Assign this action to result codes only if you are certain that all address changes with the result code should always be accepted. Addresses processed by this action are placed in the Process table of the Aura database with a value of 1006 (Approved) in the address_status column.

Automatic Reject

The Automatic Reject action is for address changes that you do not want to apply to your customer information system. Address changes processed by this action are not forwarded to an address owner for review and instead are placed in the Process table of the Aura database with a value of 1007 (Rejected) in the address_status column.

Review

The Review action is for addresses that require review by an address owner. Address changes processed by this action are placed in the Process table of the Aura database with a value of 1004 (Requesting Approval) in the address_status column. The address owner is notified by email that the address requires review. The address owner logs into the Aura website and does one of the following:

- Approves the change
- Rejects the change
- Modifies the address manually and approves the modified address
- Marks the address change as requiring the addressee's consent
- Assigns the address change to another address owner for further review

The address's address_status value is then updated to either 1002 (Approved), 1003 (Rejected), 1009 (Address Owner Modified And Approved), or 1010 (Request Consent), depending on the address owner's decision.

For more information, on address owner actions, see the *Aura User's Guide*.

Bypass

The Bypass action is for addresses containing a return code that you do not wish to appear among reviewed addresses. Records affected by this action are placed in the Audit table of the Aura database and are accounted for in reporting, but do not appear as reviewed.

Request Consent

The Request Consent action is for address changes that must be approved by the addressee. Many insurance companies, financial institutions, and governmental agencies have regulations that require addressee approval for address changes.

The addressee is typically notified in writing that their consent is required. You must use your own process to identify the addresses in the Aura database that require consent and send a consent letter to the addressee. For example, you can query the Aura database's address_status column for the value 1010 (Request Consent) then send those addresses to a product such as DOC1 to print the letter.

Address changes processed by this action are placed in the Process table of the Aura database with a value of 1010 (Request Consent) in the address_status column. The address owner can view these addresses in the Requesting Consent tab:

Move Type	Customer ID	Addressee	Description	Start Date
	1821355	VERNON H C WRIGHT	(A)-Successfully found new address.	Nov 29, 2009
	2135504	JACKLYN C. GORSETT	(A)-Successfully found new address.	Nov 29, 2009
	2371355	LINDSEY PAIGE MCLENDON	(A)-Successfully found new address.	Nov 29, 2009
	2413554	SARAH ELIZABETH KINNEY	(A)-Successfully found new address.	Nov 29, 2009
	2501355	AURA ASSET MANAGEMENT INC	(A)-Successfully found new address.	Nov 29, 2009
	2581355	ROBERT L AUGUST	(A)-Successfully found new address.	Nov 29, 2009
	3135525	RICHARD JOHN WAGER	(A)-Successfully found new address.	Nov 29, 2009
	3135527	RICHARD JOHN WAGER	(A)-Successfully found new address.	Nov 29, 2009
	3311355	ADAM M DEMARCO	(A)-Successfully found new address.	Nov 29, 2009
	3371355	RANDALL ROOT	(A)-Successfully found new address.	Nov 29, 2009

Specifying an Automatic Consent Period

You may optionally specify an automatic consent period. This will enable Aura to automatically accept the address change if the addressee does not respond to the consent letter within a specified period of time. For example, say you specify an automatic consent period of 30 days, the address change would be accepted if the addressee does not respond to the consent request within 30 days. Addresses that are automatically accepted have their address_status value set to 1002 (Approved).

To specify an automatic consent period:

1. Log on to Aura with an administrator ID and password.
2. Click **Admin**.
3. Click **Consent Management**.
4. Check the **Enable Automatic Consent Period** check box and specify the number of **Days** you want the system to wait until automatically accepting the address change.
5. Click **OK**.

Creating Custom Actions

If you have business needs that are not met by the standard actions you can create custom actions. To create custom actions we recommend that you contact our Professional Services team. For more information, see www.pbinsight.com.

Assigning Actions to Return Codes

Aura comes pre-configured with actions assigned to each return code. These default assignments reflect the most common use of Aura. If you need to modify the action assigned to a return code, follow these steps:

1. Log in to Aura with a user ID that has administrator rights.
2. Click the **Admin** tab.
3. Click **Address Correction**.
4. Click the coder, such as VeriMove, ACS, or CASS, whose actions you want to modify.
5. In the Code column, find the return code whose action you want to modify. The action currently assigned to the return code is listed in the Action column. The Start Date and End Date columns show the dates in which the action is in effect. If the current date is before or after the range specified, Aura takes no action on addresses with the return code.
6. Check the **Show Code for All domains** check box if you want to display codes for all the domains. You can use pagination at the bottom of the table to navigate through the return code list.
7. Click **Edit**.
8. In the **Action** field, select the action you want to assign to this return code. For a description of the actions, see [“Standard Actions” on page 33](#).
9. Click **OK**.
10. Click **Return to list of coders** to go back to the list of coders screen.

Default Actions Assignments

Aura comes pre-configured with actions assigned to each return code. These default assignments reflect the most common use of Aura, but you should review all the action assignments to make sure they fit your requirements. The following tables list the default actions for each return codes corresponding to VeriMove, ACS, and CASS

respectively. To change the actions for a return code, see [“Assigning Actions to Return Codes” on page 36.](#)

Table 3: Default Actions for VeriMove (Part 1 of 2)

Return Code	Description	Default Action
<blank>	Non-CASS DPV match. This address could not be validated with DPV.	Bypass
00	No match. The input record could not be matched to a change of address record in the USPS data. A new address could not be furnished.	Bypass
01	Moved to a foreign location. The new address is unavailable.	Review
02	Moved and left no forwarding address.	Review
03	PO Box closed. No forwarding address.	Review
04	Input does not have an apartment/suite, but the new address has one.	Review
05	Multiple possible new addresses for delivery point.	Review
06	Middle name/initial conflict. More than one change of address and the middle name or initial conflicts.	Review
07	Gender conflict. More than one change of address and the gender conflicts.	Review
08	The old address matched to two change of address records in the USPS® database. The two records were compared and due to differences in the new addresses a match could not be made.	Review
09	Highrise default. Change of address for family.	Review
10	Rural route or highway contract default. Change of address for family. Individual name required for exact match.	Review
11	Insufficient individual name information.	Review
12	The addressee's middle name does not match the middle name on the Change of Address record.	Review
13	The addressee's gender does not match the gender on the Change of Address record.	Review
14	The 11-digit ZIP Code of the new address is not unique.	Review

Table 3: Default Actions for VeriMove (Part 2 of 2)

Return Code	Description	Default Action
15	The addressee name is missing the first name or the name contains initials only.	Review
16	Apartment/suite information conflict.	Review
17	Addressee name insufficient for Change of Address match.	Review
18	Address matched to a general delivery address for a family. This address type requires an individual name match.	Review
19	There is a change of address on file but the new address cannot be ZIP+4 coded.	Review
20	Multiple change of addresses. Unable to resolve.	Review
66	A new address was identified but it is about to be removed from the USPS® Change of Address database.	Automatically Reject
77	The move date is more than 18 months ago. (ANK ^{Link™} match.)	Review
91	The new address was identified by dropping the apartment/suite number from the new address.	Review
92	The new address was identified by dropping the apartment/suite number from the input address.	Review
A	Successfully found new address.	Review

Table 4: Default Actions for ACS (Part 1 of 2)

Return Code	Description	Default Action
A	Attempted delivery, addressee not known	Review
B	Returned for better address	Review
D	Outside delivery limits	Review
E	Mail delivery to this address is In Dispute	Review
G	Post Office Box has been closed – created from a clerk filed COA – no new address present	Review
I	Insufficient address	Review

Table 4: Default Actions for ACS (Part 2 of 2)

Return Code	Description	Default Action
K	Customer has moved and left no forwarding address - created from a USPS filed COA - no new address present	Review
L	Mail piece Illegible	Review
M	No mail receptacle	Review
MV	Successfully found new address	Review
N	No such house number to deliver to	Review
P	Recipient Deceased	Review
Q	Not deliverable as addressed/unable to forward	Review
R	Refused	Review
S	No such street	Review
U	Mail Piece Unclaimed	Review
V	Address is Vacant	Review
W	Temporary COA -no new address present - Temporarily Away is provided in the Parsed New Address field	Review
X	No such office	Review

Table 5: Default Actions for CASS (Part 1 of 2)

Return Code	Description	Default Action
A1	Input address not matched to the ZIP+4 file	Bypass
AA	Input address matched to the ZIP+4 file	Automatic Accept
BB	Input address matched to DPV (all components)	Automatic Accept
CC	Input address primary number matched to DPV but secondary number not match (present but not valid)	Request Consent
F1	Input address is military; DPV bypassed	Automatic Accept
G1	Input address is general delivery; DPV bypassed.	Automatic Accept
M1	Input address primary number missing	Review

Table 5: Default Actions for CASS (Part 2 of 2)

Return Code	Description	Default Action
M3	Input address primary number invalid	Review
N	(LACS Indicator)~Could not match	Review
N	(DPV Vacant)~These Records were not found in the USPS vacant database	Automatic Accept
N1	Input address primary number matched to DPV but high rise address missing secondary number	Review
P1	Input address missing RR or HC Box number	Review
P3	Input address missing PO, RR, or HC Box number	Review
R1	Input address matched to CMRA but secondary number not present	Review
RR	Input address matched to CMRA	ByPass
S	(LACS Indicator)~Matched after secondary number was dropped	ByPass
U1	Input address is unique ZIP;DPV bypassed	Automatic Accept
Y	(LACS Indicator)~LACS record matched	Automatic Accept
Y	(DPV Vacant)~These Records were found in the USPS vacant database	Review

Output

Approved addresses are available in the Process table of the Aura database. Access this table to obtain approved addresses to load into your customer information system. By default, Aura does not load the updated addresses into your customer information system, nor does it output a file with the updated addresses. This is because each implementation of Aura needs to be customized to support the specific requirements of each environment.

The following sections provide the information you need to access the approved address changes from Aura.

Finding Approved Addresses

To identify address changes that have been approved, look at the Process table column **address_status_id**. Approved addresses will have one of these values:

- **1002**—This status indicates that the address was automatically approved. This indicates that the result code from the address quality software was configured as “Automatically Approve” in Aura.
- **1006**—This status indicates that the address was approved manually by an address owner. This means that the result code from the address quality software was configured as “Review” in Aura. The address owner reviewed the address change and approved it.
- **1009**—This status indicates that the address was modified by the address owner and approved. In this scenario, the address owner made manual changes to the address before approving it, so the approved address is different from the address that was returned by your address quality software. You may want to resubmit these addresses to your address quality software to verify that the manually entered address is valid.

Finding Rejected Addresses

To identify address changes that have been rejected, look at the Process table column **address_status_id**. Rejected addresses will have one of these values:

- **1003**—This status indicates that the address was automatically rejected. This indicates that the result code from the address quality software was configured as “Automatically Reject” in Aura.
- **1007**—This status indicates that the address was rejected manually by an address owner. This means that the result code from the address quality software was configured as “Review” in Aura. The address owner reviewed the address change and rejected it.

Process Table Columns

The Process table contains the following columns:

Table 6: Process Table Columns (Part 1 of 2)

Column Name	Description
address_id	A unique ID created by Aura based on address_1, state, zip, first_name, customer_id, code, effective_date, DomainId, and CoderId.
customer_id	A unique ID for this customer. For example, an account ID.
address_status_id	A numeric value indicating the current status of the address. Some of the codes are used internally by Aura, others you need to know to find approved and rejected addresses. For more information, see "Finding Approved Addresses" on page 41 and "Finding Rejected Addresses" on page 41 .
address1	The first address line as it currently exists in the the customer information system.
address2	The second address line as it currently exists in the customer information system.
city_id	The city name as it currently exists in the customer information system.
state_id	The postal abbreviation for the state as it currently exists in the customer information system.
zip	The five-digit ZIP Code as it currently exists in the customer information system.
new_address1	The line line of the new address returned by VeriMove, CODE-1 Plus, or Finalist.
new_address2	The second line of the new address returned by VeriMove, CODE-1 Plus, or Finalist.
new_city_id	The city name of the new address returned by VeriMove, CODE-1 Plus, or Finalist.
new_state_id	The postal abbreviation of the new state returned by VeriMove, CODE-1 Plus, or Finalist.
new_zip	The five-digit ZIP Code of the new address returned by VeriMove, CODE-1 Plus, or Finalist.
updated_date	The date when the address status was last updated. This date is updated when the following status changes occur: <ul style="list-style-type: none"> • From In Progress to Automatically Accepted or Rejected • From Requesting Approval to Address Owner Accepted or Address Owner Rejected.
created_date	The date when the address entered the Aura system.

Table 6: Process Table Columns (Part 2 of 2)

Column Name	Description
coder_rules_id	The ID from the coder_rule table for the return code.
open_edms_address_owner_id	The Aura user ID of the address owner for this address. The address owner is the person who needs to review changes to this address.
first_name	The first name of the addressee.
last_name	The last name of the addressee.
address_source_id	An ID used internally by Aura to represent the folder that contained the input file from which the address originated.
effective_date	The date when the new address takes effect. For example, an effective date of October 1 means that the postal service will start forwarding mail to the new address on October 1.

Plans

A plan is a set of actions that the system performs on records based on defined criteria. For example, when you enable Automatic Consent, a plan is created to look at the age of a record to see if it's reached the threshold of the automatic consent. If so, it changes the status of a record from Requesting Consent to Approved.

Creating a Plan

Aura comes with plans that cover most needs. However you can create your own custom plans if you have additional requirements. To create a plan, use Sagent Design Studio. For more information, see the *Sagent Design Studio User's Guide*.

Scheduling a Plan

Plans can be scheduled to run on a recurring basis. For example, you may have a plan that extracts records from Aura and exports them to a CSV file for import into your CRM system, and you could schedule this plan to run on a daily schedule to support the automatic updating of your CRM.

To schedule a plan,

1. Log in to Aura as an administrator.
2. Click **Admin**.
3. Click **Scheduler**.
4. Select the plan you want to schedule and the frequency.
5. Click **OK**.

Modifying the Schedule of a Plan

You can modify the frequency of an already scheduled plan. For example, you have scheduled a plan to run on a daily schedule. Aura allows you to change the frequency of running the plan from daily to monthly or weekly.

To modify a schedule,

1. Log in to Aura as an administrator.
2. Click **Admin**.

3. Click **Scheduler**.
4. Click **Edit** corresponding to the plan you want to modify.
5. Select the new frequency.
6. Click **Update**.

Meta Field Management

Aura allows users to add new fields, such as Account Number or SP Code, which are displayed on the Review pages dynamically. Using this feature, users can capture desired additional information related to a customer.

Adding a New Field

To add a new field:

1. Log in to Aura as an administrator.
2. Click **Admin**.
3. Click **Meta Field Management**.
4. Under Create New Meta Field, fill in the following fields with appropriate information:
 - **Field Name**
 - **Field Type**
 - **Field Length**
 - **Display Name**
5. Click **OK**. The newly added field will be displayed in the Meta Field List. You can also view a newly added meta field on the Address Validation page by clicking a Customer ID or Addressee on the Review tab.

Email Management

Aura allows you to configure your own SMTP Server to send emails to the address owners. The emails are sent related to the reviewed records when the Verimove/CASS file is run and the assigned records in Aura.

To configure the outbound email server,

1. Log in to Aura as an administrator.
2. Click **Admin**.
3. Click **Email Management**.
4. Fill in the following fields with appropriate information:
 - **Outbound Email Server (SMTP)**
 - **Outbound Email Server Port (SMTP)**
 - **Reply-To Email Account**
 - **Email Forward Subject**
 - **Multi Part Email**
 - **Email Forward URL**
 - **Email Footer Message**
 - **Authentication User Name**
 - **Authentication Password**
5. Check the **Authentication required** check box if you want to make authentication mandatory.
6. Click **Save**.

License Management

Aura provides default license for 25 concurrent users. With the increase in number of users, additional License fees can be applied

Activating a License File

To activate a license file:

1. Log in to Aura as an administrator.
2. Click **Admin**.
3. Click **License Management**.
4. Browse the **License File** that you want to activate.
5. Enter the **Activate Password**.
6. Click **Activate**.

Workflow Management

Aura provides system users the capability to create multi-level configurable workflow templates using OpenEDMS Desktop designer application. System users can also view & activate multi-level configurable workflow templates created using OpenEDMS Desktop application. To activate, validate, or suspend a workflow template:

1. Log in to Aura as an administrator.
2. Click **Admin**.
3. Click **Workflow Management**.
4. Click a radio button corresponding to the workflow template that you want to activate, suspend, or validate.
 - To activate the workflow template, click **Activate**.
 - To suspend the workflow template, click **Suspend**.
 - To validate the workflow template, click **Validate**.

Workflow

Aura Workflow is a powerful tool to define processes to help improve business efficiency and accountability. This tool is comprised of two parts, the “Workflow Designer” which is used to design individual workflow processes and the “Workflow Manager” which is used by the users to participate in their assigned roles in the process.

Workflow templates are created using the “Workflow Designer” available on the “Workflow” menu on the OpenEDMS Desktop application. This Desktop application is a software program that the user needs to install on their own computer.

Workflow Designer

The “Workflow Designer” provides an intuitive graphical interface from which administrators and authorized users can construct flowchart-style workflow templates to submit address records in the workflow.

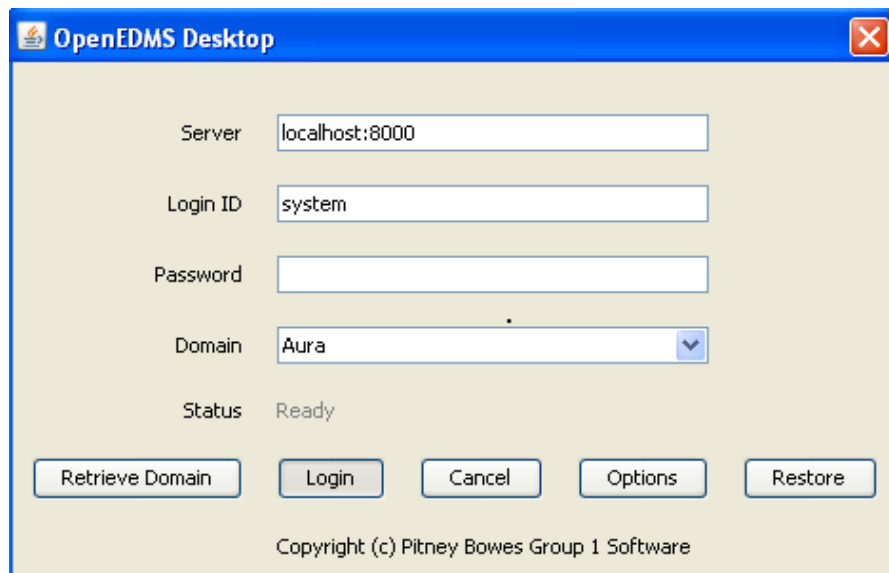
- Regulate address records development collaboration, review, and distribution
- Streamline and coordinate address records dependent processes with stage-specific schedules and automated notifications that pace, prompt, and apprise designated workflow participants at each stage in the workflow process

OpenEDMS Desktop Introduction

OpenEDMS Desktop is used by any authorized users to create and manage workflow templates. It has been designed to be used by non-technical users so that IT Administrators are not required to establish required workflows.

OpenEDMS Desktop Login

1. Click the shortcut, or select the “OpenEDMS” programs folder on the “Start” menu. The “OpenEDMS Desktop Login” screen is displayed.



OpenEDMS Desktop

Server localhost:8000

Login ID system

Password

Domain Aura

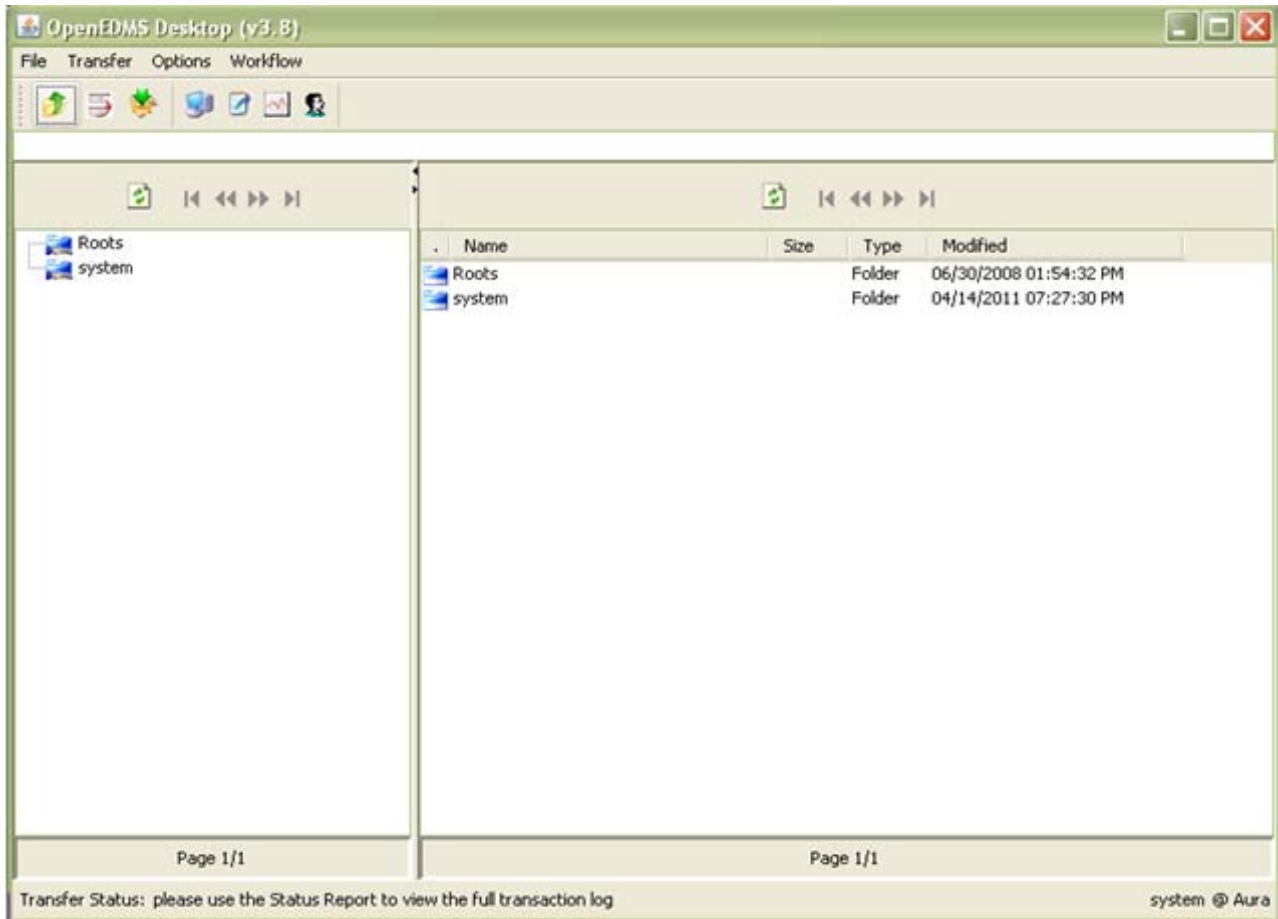
Status Ready

Retrieve Domain Login Cancel Options Restore

Copyright (c) Pitney Bowes Group 1 Software

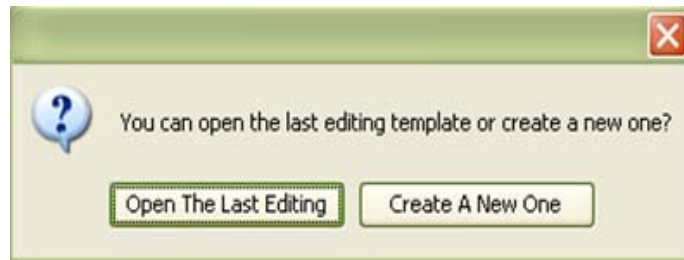
2. Enter the desired **Server**. Replace the default URL (openedms.com:80) with your own server name or IP address (if you wish to run “OpenEDMS Desktop” in the same machine as the “OpenEDMS” server, you can use localhost). If no port number is provided, the system will attempt to connect to port 80 by default; a different port number can be specified (e.g. localhost:8080).
3. Enter your **Login ID**.
4. Enter your domain **Password**.
5. Retrieve the Domains from the Server. Once you have entered a valid server address, click **Retrieve Domain** and select the target **Domain** (into which the material will be imported).
6. To configure SSL, Font, upload protocol, and proxy, click **Options**.

7. To perform a full system restore after an export system, click **Restore**.
8. Click **Login**. The “OpenEDMS Desktop” screen is displayed.

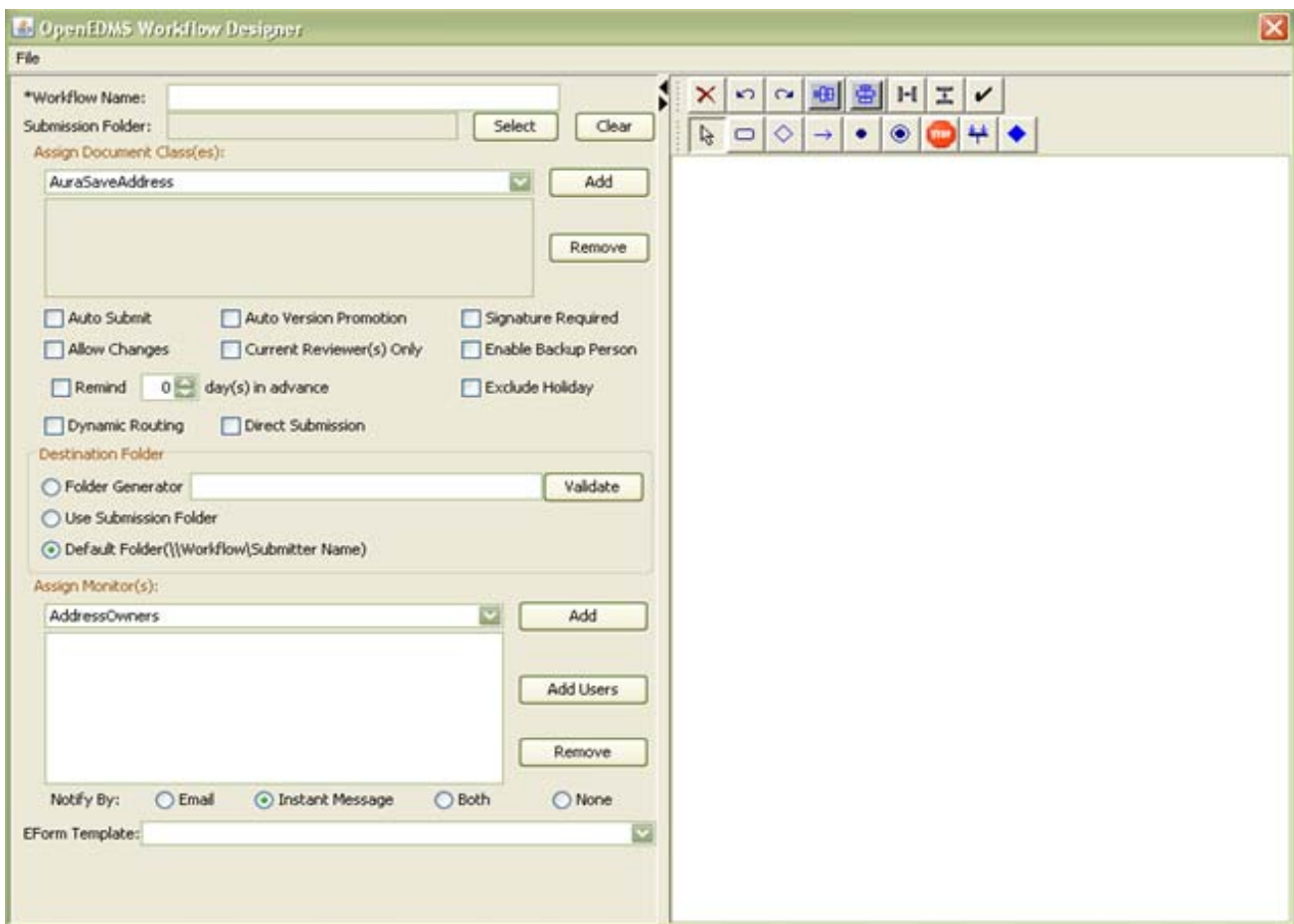


Workflow Template Creation

1. On the **OpenEDMS Desktop** screen, select **Designer** from the **Workflow** menu.
2. In the dialog box, select **Create A New One**.



- the **OpenEDMS Workflow Designer** screen is displayed with an empty template field.



- Complete the following:

- Workflow Name - Name for the new workflow
- Submission Folder - Where address records must be submitted to workflow. This will be specified internally in root folder. If required, user can change the submission folder.

NOTE: Use the **Select** button to specify the **Submission Folder**.

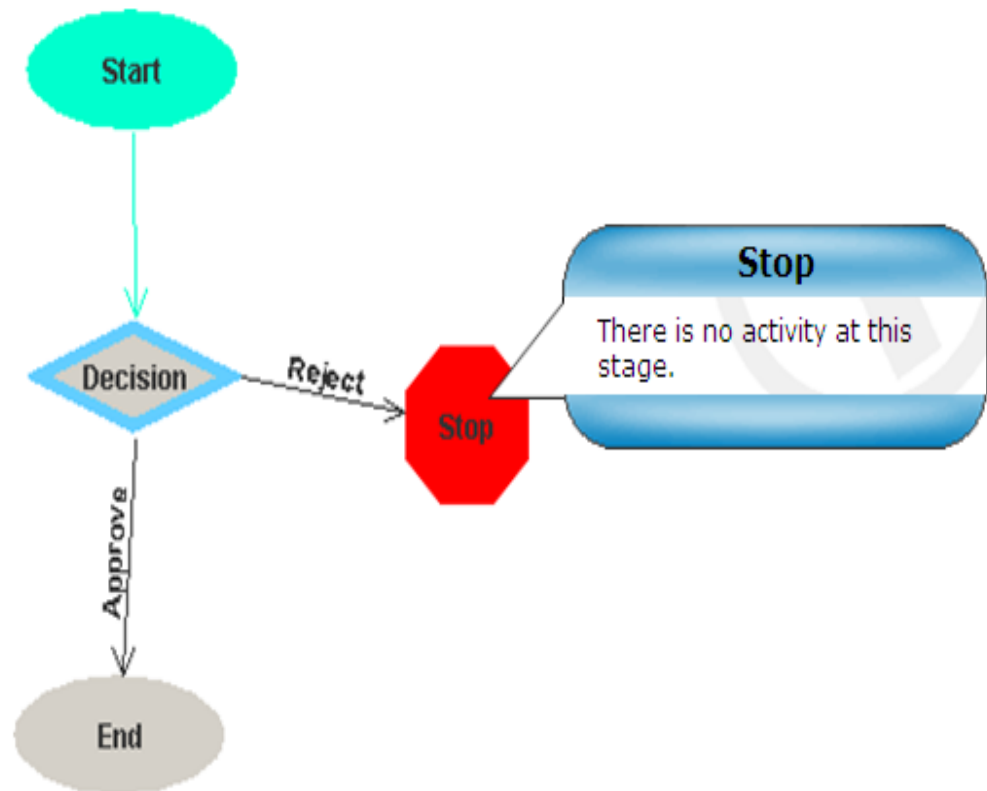
- Document Class - Document classes are used to control which address records are controlled by which templates.
- Submission Properties - Select the following properties if required.
 - Auto Submit: When a valid submitter to a workflow uploads a document to the “Submission Folder”, then the document is automatically submitted to the workflow. The user does not need to manually submit the document. Documents from a user who is not a submitter are not submitted to the workflow.

NOTE: When Auto Submit is enabled, every repository document belonging to any one of the document classes assigned to the workflow template is automatically submitted for processing, no matter where the document is located in the repository.

- Auto Version Promotion - If selected, whenever the workflow will be modified, the workflow template will be automatically promoted to the new version of the workflow.
 - Destination Folder - This controls where the workflow address records are stored. You can only select the Default Folder option.
5. Assign Monitors. Monitors can be assigned to a workflow to monitor the process of address records in the workflow. A Monitor may or may not be a participant in the workflow. The Monitor receives notification on every phase of the workflow. What stage the workflow is on, who has approved the workflow, all notifications.
 6. Select the **Eform Template**.
 7. Use the drawing tools on the **Drawing Toolbar** to design a workflow template:



8. A sample workflow template is shown in the screen shot below.



9. Right click on different symbols in the designed workflow template and select **Property** to display the corresponding property dialog boxes as shown below. Specify appropriate values to the properties.



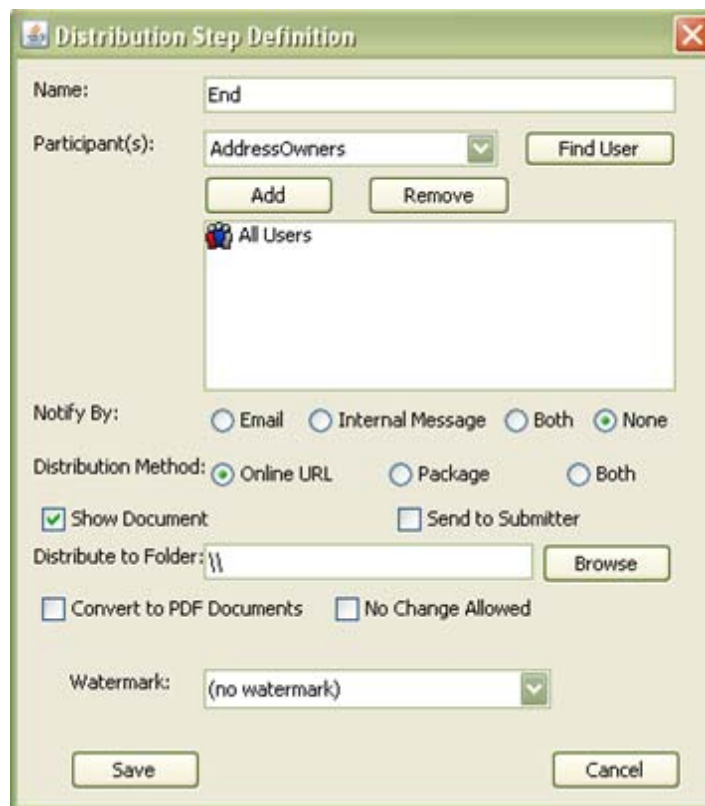
Submission Step Definition

Name:

Participant(s):

All Users

No Transaction View



Distribution Step Definition

Name:

Participant(s):

All Users

Notify By: Email Internal Message Both None

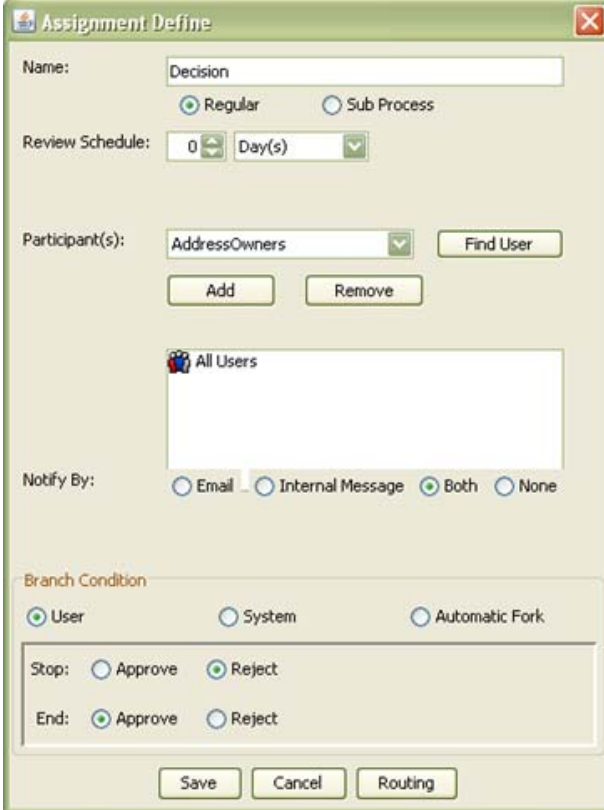
Distribution Method: Online URL Package Both

Show Document Send to Submitter

Distribute to Folder:

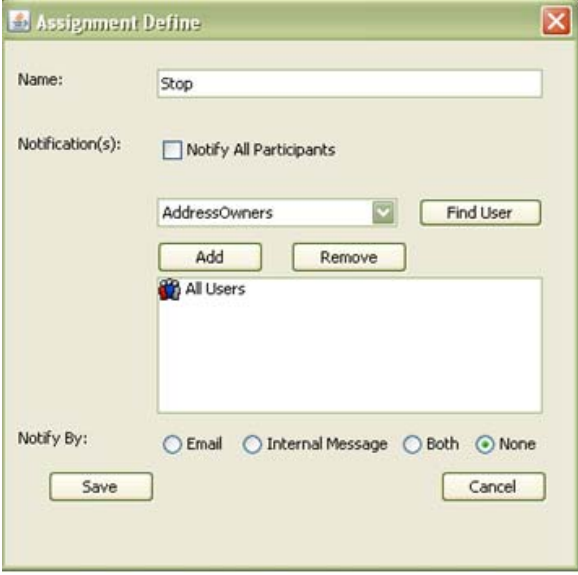
Convert to PDF Documents No Change Allowed

Watermark:



The "Assignment Define" dialog box is shown with the following configuration:

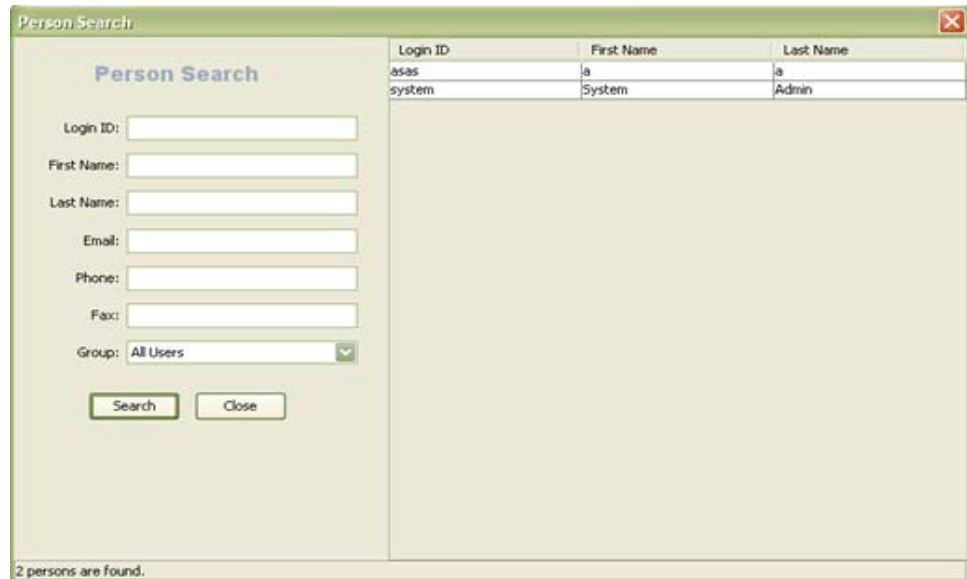
- Name: Decision
- Regular (selected), Sub Process
- Review Schedule: 0 Day(s)
- Participant(s): AddressOwners (selected in dropdown), Find User, Add, Remove
- Notify By: Both (selected), Email, Internal Message, None
- Branch Condition: User (selected), System, Automatic Fork
- Stop: Reject (selected), Approve
- End: Approve (selected), Reject
- Buttons: Save, Cancel, Routing



The "Assignment Define" dialog box is shown with the following configuration:

- Name: Stop
- Notification(s): Notify All Participants (unchecked)
- Participant(s): AddressOwners (selected in dropdown), Find User, Add, Remove
- Notify By: None (selected), Email, Internal Message, Both
- Buttons: Save, Cancel

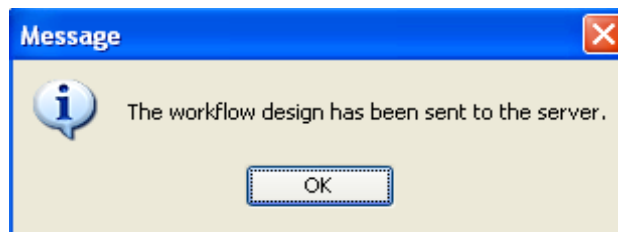
10. Click **Find User** to search for a desired person.



11. Click **Check** icon in the **Drawing Toolbar** to validate the workflow template.



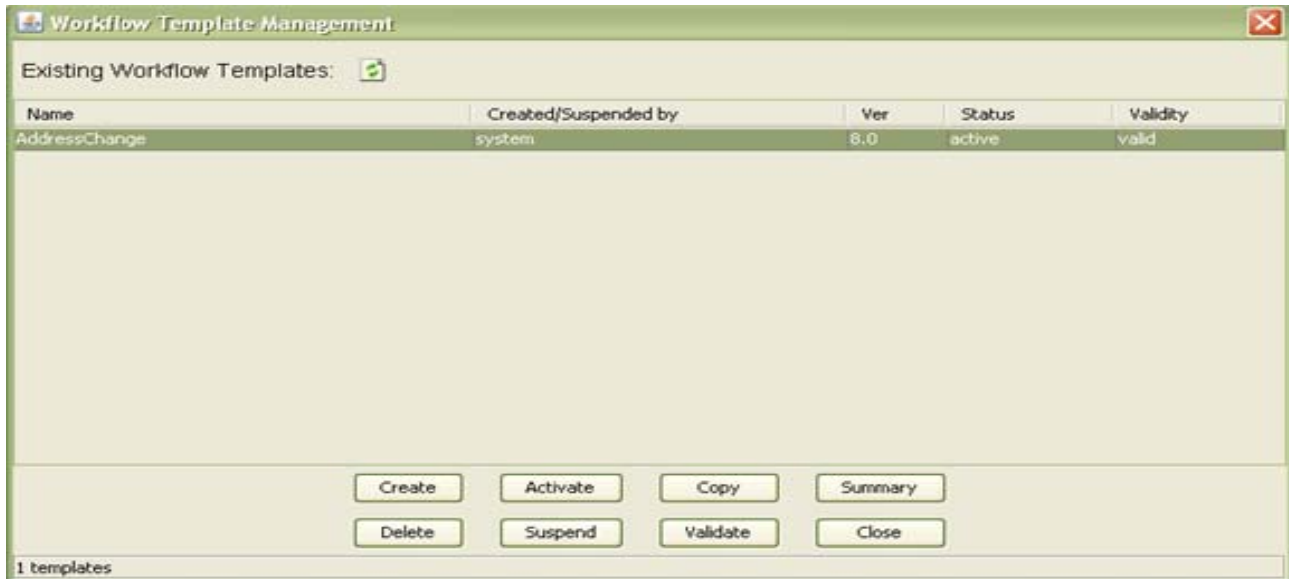
12. In the **File** menu, select **Save** to store the workflow at your desired location. for future use. On the **OpenEDMS Desktop** screen, select **Import** from the **Workflow** menu to open and then modify this saved workflow.
13. After creating a new workflow or modifying an existing workflow, select **Save to Server** from the **File** menu to submit the workflow to the server.



14. On the **OpenEDMS Desktop** screen, select **Template** from the **Workflow** menu to activate that workflow. For more information on how to perform various activities on the workflow, see [Workflow Template Management](#).

Workflow Template Management

1. On the **OpenEDMS Desktop** screen, select **Template** from the **Workflow** menu.



2. Double click on an existing template to edit.
3. To create a workflow template, click **Create**.
4. To activate the selected workflow template, click **Activate**.
5. To copy the selected workflow template, click **Copy**.
6. To display summary of the selected workflow template, click **Summary**.
7. To suspend the selected workflow template, click **Suspend**.
8. To validate the selected workflow template, click **Validate**.
9. To delete the selected workflow template, click **Delete**.
10. To close the Workflow Template Management screen, click **Close**.

CHAPTER 3

User Accounts and Domains

Introduction	60
Managing Users in Aura	60
Creating a User	60
Editing User Information	61
Assigning LDAP Users to Multiple Domains	62
Deleting a User	62
Changing Passwords	63
Domains	64
Domains	64
Creating Domains	64
Assigning a User to a Domain	64
Modifying a Domain	65
Enabling and Disabling Domains	66

Introduction

User accounts provide different levels of access to address owners, domain administrators, and Aura system administrators. There are three types of user accounts:

- **system**—The “system” account has full access to all administrative features in Aura. The login ID for this account is always “system”.
- **Domain administrators**—Domain administrators are able to create and manage users in their domain but do not have access to other domains.
- **Normal users**—Normal users have access to the address records that require their attention and can approve or reject address records in their queue.
- **LDAP users**—LDAP users can be mapped to multiple domains within Aura.

Managing Users in Aura

User management features are located on the Admin tab. From here, you can add new users and edit user information for existing users.

Creating a User

User accounts must follow these rules:

- First name, Last name, and password must be at least one character.
- A valid email address is required.

To create a new user:

1. Log in with an account that has domain administrator rights or the “system” account.
2. From the *Home* page, click the **Admin** tab.
3. On the *Admin Tasks* page, click **Manage Users**.
4. From the *Add new user or modify existing user* page, click **Add new user**.
5. Complete the fields on the **Profile** and **Contact** tabs.

NOTE: To enable better tracking of records, the **Login ID** field should be the same as the Address Owner ID from your source system. If you need this field to be something other than your source system's Address Owner ID, please contact Technical Services to build a table to map between your source system and Aura.

6. If you logged in with the “system” account, click the **Domain** tab and select the domain you want the user to be added to. For more information on domains, see “Domains” on page 64.

NOTE: If you logged in with a domain administrator account you will not see the **Domain** tab. The user will be added to the domain to which you have administrator rights.

7. Click **OK**.

The **Registration completed successfully** message displays. If any information is incomplete, a message box displays that describes the information that is incorrect or missing.

Editing User Information

You can edit the First name, Last name, and Email settings for an existing user. You can also change the password for an existing user. You cannot change the User ID for an existing user.

To edit the user information for an existing user:

1. Log in with an account that has domain administrator rights or with the “system” account.
2. From the *Home* page, click the **Admin** tab.
3. On the *Admin Tasks* page, click **Manage Users**.
4. From the *Add new user or modify existing user* page, click **Edit** for the user you want to modify.
5. Click **Cancel** to return to the *Add new user or modify existing user* page.

Assigning LDAP Users to Multiple Domains

You can assign LDAP users to multiple domains within Aura. To do this,

1. Log in Aura with your LDAP user credentials.
2. From the *Home* page, click the **Admin** tab.

NOTE: You also need to create new domains within Aura to which you will be mapping the LDAP users. For more information on how to create a domain, see [Creating Domains](#).

3. On the *Admin Tasks* page, click **Manage Users**.
4. Click **Edit** corresponding to an LDAP user.
5. You can see the newly created domains under EDMS Domain. You can move desired domains under Selected domains using Domain Selection buttons.
6. Click **Update**. Now, the selected domains are mapped to the LDAP user.

Deleting a User

To delete a user:

1. Log in with an account that has domain administrator rights or with the “system” account.
2. From the *Home* page, click the **Admin** tab.
3. On the *Admin Tasks* page, click **Manage Users**.
4. If the user you are deleting has administrator rights you must first remove the user’s administration privileges:

- a. From the *Add new user or modify existing user* page, click **Edit** for the user you want to delete.
 - b. Click the **Domain** tab.
 - c. Un-check the **Administrator** check box.
 - d. Click **Update**.
5. From the *Add new user or modify existing user* page, click **Delete** for the user you want to delete.

The **Do you want to delete this user?** message displays.

6. Click **OK** to delete the user.

NOTE: Any records assigned to the user you delete will be reassigned to the “system” user.

Changing Passwords

You can change your own password from the *Settings* tab or the password for other users in the *User Information* page. For information about changing password in the *User Information* page, see [“Editing User Information” on page 61](#).

To change your own password:

1. Click the **Settings** tab.
2. On the *Change Your Password* page, type your current password in the **Password** text box.
3. Type your new password in the **New Password** and **Confirm New Password** text boxes.
4. Click **Change Password**.

Domains

A domain organizes related users and records into a group and are used to ensure privacy of information. Users can only access the records for the domain to which they are registered. All records are stored and manipulated independently of other domains.

You can create multiple domains in a single Aura environment. A separate administrator may be assigned to configure and monitor each.

When logging in, click on the domain drop-down list to select a valid domain.

Creating Domains

1. Log in to Aura with the “system” account. Only the “system” account can create domains.
2. Click the **Admin** tab.
3. Click **Domain Management**.
4. Click **New**.
5. On the Create New Domain screen, enter a **Domain Name**.
6. If you want the new domain to be an active directory domain, then do the following:
 - a. Check the **Active Directory Domain** check box.
 - b. Enter **Active Directory Host** and **LDAP Context**.
 - c. Click **Validate**.
7. click **Create**.

Assigning a User to a Domain

If you are a domain administrator, the users you create and manage are in your domain only. You cannot assign a user to a different domain. However, if it is necessary to move a user from one domain to another this can be done using the “system” user account.

1. Log in to Aura with the “system” user ID.

2. Click the **Admin** tab.
3. Click **Manage Users**.
4. Click **Edit** for the user you want to modify, or click **Add new user** if you are creating a new user.
5. Click the **Domain** tab.
6. Select the domains you want to assign the user to. You can register a user to multiple domains.
7. (Optional) If you want to make the user a domain administrator, check the **Administrator** check box next to the domain name. Domain administrators can set access levels for other users in that domain and perform other administrative functions for the domain.

NOTE: To give users administrator rights to a domain you must be logged in with the “system” user ID.

8. Click **Update**.

Modifying a Domain

1. Log in to Aura with the “system” account. Only the “system” account can create domains.
2. Click the **Admin** tab.
3. Click **Domain Management**.
4. Select a domain and click **Edit**.
5. On the Edit Domain screen, enter a **Domain Name**.
6. If you want the new domain to be an active directory domain, then do the following:
 - a. Check the **Active Directory Domain** check box.
 - b. Enter **Active Directory Host** and **LDAP Context**.
 - c. Click **Validate**.
7. click **Create**.

Enabling and Disabling Domains

You can control processing for a domain by enabling or disabling the domain. If you disable a domain the input file from the address software (for example, VeriMove or Mail 360) is not processed for the domain. Also, when a domain is disabled address owners cannot log in.

To enable or disable a domain,

1. Log in to Aura with the “system” account. Only the “system” account can enable and disable domains.
2. Click the **Admin** tab.
3. Click **Domain Management**.
4. Select the domain you want to enable or disable then click either **Enable** or **Disable**.

CHAPTER 4

Monitoring and Logs

- Viewing Aura Service Status 68
- Logging 68

Viewing Aura Service Status

To check the status of Aura components:

1. Log in to Aura with a user ID that has administrator rights.
2. Click the **Admin** tab.
3. The status of each of the services is displayed. The services are:
 - **File Monitor**—Monitors the trigger folder for output files from your address quality software (VeriMove, CODE-1 Plus, or Finalist). If a new file is present, it submits it to the Address Correction service for processing.
 - **Address Processing**—Controls Sagent Dataflow, which runs plans. Plans apply business logic to the records and takes appropriate action. For more information, see “Plans” on page 44.

Logging

There are two categories of logs in Aura:

- [Aura Log File](#)
- [Database Transaction Logs](#)

[Aura Log File](#)

The Aura log file records the activity of the Aura file monitoring service. It is AuraLog.txt. It can be found in **<InstallLocation>\Aura\Log**.

[Database Transaction Logs](#)

Each of the three SQL databases used by Aura have their own transaction logs. The transaction log files are:

- <AuraInstallPath>\data\Aura_log.ldf
- <AuraInstallPath>\data\Aura_Repo_log.ldf

The Aura_log.ldf transaction log will grow over time. Your SQL database administrator will need to implement a process to manage the size of this database. For example, you can run the following query in SQL Server to reduce the size of the transaction log to 5 MB.

```
use aura
backup log aura
with truncate_only
dbcc shrinkfile (aura_log, 5)
```


CHAPTER 5

Troubleshooting

File Monitoring Service (FMS) Log Issues	72
Unable to connect to the DFS agent. Is it running?.....	72
Error while beginning the execution for the step 'Load to Process Table'	72
Error while logging into the repository	72
Error while processing the data for the step 'VeriMoveFile'	73
Transport-level error when sending the request to the server ..	73
Aura Issues	74
User unable to log in	74
Reports take a long time to run	74
Records missing from the review tab.	74
Unable to launch the Aura from a Windows 2008 server	75
Error when logging into Aura	75
"Invalid Date" error after creating new domain	75
Database Issues	76
Plan runs successfully but no records appear in the Review tab	76
The number of records in the log file is different from the number in the report	76
Blank Xform	76
The size of the Catalina logs in Tomcat is increasing.....	76
The size of the Aura database log file is increasing	77

File Monitoring Service (FMS) Log Issues

Following are the errors that may get reported in log file present at <AuraInstallPath>\Log directory.

Unable to connect to the DFS agent. Is it running?

Problem: Unable to connect to the DFS agent.

Cause: The Address Processing Service is not running. Start this service or go to Start > Run, type **services.msc**, and navigate to the Sagent Dataflow service and start this service.

Error while beginning the execution for the step 'Load to Process Table'

There are two problems related to this issue.

Problem 1: The following error appears:

Error: Error Number 804. Severity 100. Failed to Initialize Data Source.
Description: [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied.
Source: Microsoft OLE DB Provider for SQL Server HRESULT: 0x80004005, Minor Code: 17 SQLState: 08001, SQL Error Number: 17 Severity: 16

Cause: The SQL Server name is not properly set for Aura_final base view.

Problem 2: The following error appears:

Error: Error Number 804. Severity 100. Failed to Initialize Data Source.
Description: Login failed for user 'sa'.
Source: Microsoft OLE DB Provider for SQL Server HRESULT: 0x80040e4d, Minor Code: 18456 SQLState: 42000, SQL Error Number: 18456 Severity: 14

Cause: The login name or password is not correctly provided in Sagent Admin Baseviews (Aura_final) Baseview Login.

Error while logging into the repository

Problem: When attempting to log in to the repository the following error appears:

[sa:<password>:SQL Server:<server-name>:aura_repo:sa:<password>]
Description: [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist

or access denied.

Source: Microsoft OLE DB Provider for SQL Server HRESULT: 0x80004005, Minor Code: 17

SQL State: 08001

SQL Error Number: 17

Cause: The server name (dbHost), password (dbPass) or other configuration setting is not correct in <AuraInstallPath>\Config\AuraSettings.xml.

Error while processing the data for the step 'VeriMoveFile'

There are two problems related to this issue.

Problem 1: The following error occurs while processing the data for the step VeriMoveFile:

Error in source line 1, field 'address_owner_id': : Column data is required

Cause: The address_owner field (address owner's Id) is missing from the log file.

Problem 2: The following error occurs while processing the data for the step VeriMoveFile:

Error in source line 1, field 'customer_id': Column data is required. None provided for field. Error has occurred

Cause: The customer_id field is missing from log file.

Transport-level error when sending the request to the server

There are two problems related to this issue.

Problem 1: The following errors occur:

A transport-level error has occurred when sending the request to the server. (provider: Shared Memory Provider, error: 1 - I/O Error detected in read/write operation)

Timeout expired. The timeout period elapsed prior to completion of the operation or the server is not responding.

Cause: The SQL Server connection is closed. Restart the Aura FMS.

Problem 2: The following errors occur:

A transport-level error has occurred when sending the request to the server. (provider: Shared Memory Provider, error: 0 - No process is on the other end of the pipe.)

An error has occurred while establishing a connection to the server. When connecting to SQL Server 2005, this failure may be caused by the fact that under the default settings SQL Server does not allow remote connections. (provider: SQL Network Interfaces, error: 26 - Error Locating Server/Instance Specified)

Cause: These errors occur when SQL Server is stopped while the Aura FMS is running OR when SQL Server is already in stop mode and the Aura FMS is started.

Aura Issues

User unable to log in

Problem: A User is present in the “Manage Users” screen but is not able to log into the application.

Cause: The license file could be missing. See the *Aura Installation Guide* for instructions on how to activate a license file.

Reports take a long time to run

Problem: Reports are taking longer to run than last time even though the record count is the same.

Cause: Report generation depends on the load on server.

Records missing from the review tab

Problem: Review tab is not showing any record though present in database.

Cause: There is insufficient memory pool for Tomcat. Increase the Tomcat memory pool by going to *Start > Program Files > Apache Tomcat > Configure Tomcat*. Go to the **Java** tab. Set the memory pool accordingly then restart the Tomcat service.

Unable to launch the Aura from a Windows 2008 server

Problem: Aura cannot be launched from a system running Windows 2008 Server

Cause: Aura is not listed as a trusted website in the browser. Add Aura URL to your browser's trusted websites list.

Error when logging into Aura

Problem: When trying to log into Aura the following error is displayed:

An error has occurred while establishing a connection to the server. When connecting to SQL Server 2008, this failure may be caused by the fact that under the default settings SQL Server does not allow remote connections. (provider: Named Pipes Provider, error: 40 - Could not open a connection to SQL Server)

Cause: The wrong SQL Server instance was provided during the Aura installation process. Reinstall Aura and give the correct SQL Server instance when asked for it during the installation process.

"Invalid Date" error after creating new domain

Problem: After creating a new domain, when you run the log file through the file monitor service an "Invalid Date" error appears.

Cause: Whenever you create a new domain in Aura you have to configure the coder rules for the new domain from the existing domain Aura. To do this, click the **Admin** tab, then click **Address Correction**. Select **New Domain** from dropdown box at the bottom of Address Correction screen and configure new coder rules from the domain Aura.

User unable to reconfigure CASS/ACS configuration from the Aura UI

Problem: User cannot reconfigure CASS/ACS configuration from the Aura UI.

Cause: While running Sagent plan has failed which can be cross checked from the CASS/ACS logs present at the Aura install path/log folder.

Workaround: Go to Aura database in SQL Server, edit the value in the is_log column of the cass_data_conf table from "P" to "I", and save the table. Now, go to Aura UI and try to reconfigure the CASS/ACS configuration.

Database Issues

Plan runs successfully but no records appear in the Review tab

Problem: Plans have run successfully but records do not appear in the Review tab. There are no errors in the log file.

Cause: The address_owner ID in log file is not in the database so the records assigned to that address owner are instead assigned to the System user. Go to the Manage Users screen and verify that the address_owner in the log file is entered into the Aura system.

The number of records in the log file is different from the number in the report

Problem: The log file contains 10,000 records while report is showing 9100.

Cause: There could be some duplicate records present in the file or the address owner may be missing from the Aura system (see “[Plan runs successfully but no records appear in the Review tab](#)” on page 76 for more information).

Blank Xform

Problem: A blank Xform is displayed.

Cause: The master database of SQL Server is not set to match the Aura database collation “SQL_Latin1_General_CP1_CI_AS”. This prevents an address owner from being able to view the data in the Xform.

The size of the Catalina logs in Tomcat is increasing

Problem: The size of Catalina logs in Tomcat is increasing with each run of the new log file.

Cause: This is expected behavior. Please delete the Catalina logs with each run of the new file.

The size of the Aura database log file is increasing

Problem: The Aura Database Log File size is increasing exponentially.

Cause: This is expected behavior. Log in to SQL and run the following command:

```
USE AURA
GO
ALTER DATABASE aura SET RECOVERY SIMPLE
GO
USE aura
GO
DBCC SHRINKFILE (aura_log, 1)
GO
ALTER DATABASE aura SET RECOVERY FULL
GO
```


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