

# Aura User's Guide

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For Windows



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# CHAPTER 1

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## Introduction to Aura

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## 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
- 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

## The Aura Browser

Aura has a browser-based interface that allows address owners to review address modifications and allows Aura administrators to perform tasks such as mapping return codes to workflows, managing users, and viewing reports. This guide focuses on reviewing, approving, and rejecting addresses.

# CHAPTER 2

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## Using Aura

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## Introduction

When your address validation software (VeriMove) modifies an address, it indicates what was modified (the street name, the postal code, etc.) or what, if any, address elements could not be validated by including return codes with each address. Aura takes addresses modified by your address validation software and, based on the type of modification made to the address, allows you to review the change and approve or reject the change, thereby allowing only approved changes to be applied to your customer information system. Aura will then store the processed data in the database with the appropriate status codes.

## Logging On to Aura

Before you can review addresses in Aura, you must first log on to the Aura server. The URL is in the format <http://<servername>:8080/edms>. From the initial Aura page, enter your user name and password in the Log In area. This will take you to the Review page.

This chapter discusses how to review suspect addresses. See the *Aura Administrator's Guide* for more information on configuring Aura.

## Changing Your Password

You can change your password within the Aura system.

1. Click the **Settings** tab.
2. Complete the fields on the *Change Your Password* page.
3. Click **OK**.

## Searching for Modified Addresses

1. Click **Review**.
2. Click the **Show Options** icon to show search fields.



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**NOTE:** Click this same icon again to hide search fields.

---

3. Complete the **Start Date** and **End Date** fields as desired to define your search.



- Complete the **Addressee** field and/or **Customer ID** field.

**NOTE:** Click the magnifying glass (“Find User”) icon if you want to search for a particular addressee. You do not need a complete search string to receive returned results. For instance, entering “a” in the First Name field would yield all first names that begin with “a.”

Click the eraser (“Clear Creator Option”) icon to clear a search you’ve performed.

- Click **Search**. Any modified addresses found within your search will display below the search fields.

More Actions	Move Type	Customer ID	Addressee	Description	Start Date
		3271	KORY M WEBSTER	(A)-Successfully found new address.	Nov 28, 2009
		3405	GARY W PHIFER	(A)-Successfully found new address.	Nov 28, 2009
		3515	LUIS J LOPEZ	(A)-Successfully found new address.	Nov 28, 2009
		4172	ANNABELLE AGCAOILI	(D1)-Moved to a foreign location. The new address is outside the USPS ...	Nov 28, 2009
		7455	ROBIN D RIVARD	(A)-Successfully found new address.	Nov 28, 2009
		7456	ROBIN D RIVARD	(A)-Successfully found new address.	Nov 28, 2009
		7550	JONATHAN D. STONE	(A)-Successfully found new address.	Nov 28, 2009
		7812	WILLIAM W PASTORE	(A)-Successfully found new address.	Nov 28, 2009
		7813	WILLIAM W PASTORE	(A)-Successfully found new address.	Nov 28, 2009
		7841	CARRIE ANN KLEPACZ	(A)-Successfully found new address.	Nov 28, 2009

### Icons

Move Status	
	A move occurred within the past 12 months. The updated address has been provided by NCOA <sup>Link</sup> .
	Not enough information was provided to make a match against NCOA <sup>Link</sup> data.
	A move occurred more than 12 months ago. The updated address has been provided by NCOA <sup>Link</sup> .
	A move occurred but the new address is unknown.



An Address Correction Service (ACS™) notice was generated for this address. The ACS notice is generated for one of the following reasons:

- **Change of Address (COA)**—The addressee moved and a new address is provided.
- **Nixie**—The addressee is not at the address and cannot be located. Some reasons include the person moved and left no forwarding address, the address is vacant, or the address does not exist.

#### Move Type Icons



The input address was matched to an individual forwarding address.



The input address was matched to a family forwarding address.



The input address was matched to a business forwarding address.

## Fields

- **Addressee**—the first name and last name of the address that was modified
- **Customer ID**—A unique ID for this customer. For example, an account number.
- **Description**—shows the return code that was provided as the reason for the change
- **Start Date**—shows the date the record was created in Aura

## Approving or Rejecting Address Changes

To review and approve address changes,

1. Click the **Review** tab. The addresses associated with your login are displayed. You may first need to search Aura documents or workflows for addresses that have been modified.
2. Addresses are assigned to address owners automatically based on the address data input file from VeriMove, and each address has an owner ID associated with it. You should see the addresses that are assigned to you. Use the search results to then approve or reject a modified address.

You can also review system-owned records by entering “system” in the **Login ID** field on the search page. This allows you to isolate system records from your and other address owners’ records. Note that when you refresh this screen all address owners’ records will appear.

Follow these instructions to approve or reject an address from the search results screen.

1. Place a check in the box for the appropriate Addressee(s).
2. Select an option from the drop-down menu just above the search results.

Approve	Approve the address change.
Reject	Reject the address change.
Request Consent	Obtain approval from the addressee to use the updated address. For more information see <a href="#">“Requesting Consent” on page 11.</a>

3. Click **OK** at the confirmation dialog. The call then goes to the workflow for approval or rejection of selected records and those records will be available in the Completed tab.

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**NOTE:** If you need more information regarding a modified address before approving or rejecting it, click the Addressee number. The *Address Validation* page opens, showing the current (old) address, the proposed new address, and an explanation for how the new address was identified.

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## Requesting 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. When an address change requires consent the addressee is typically notified in writing that their consent is required.

You can view the addresses that are in the process of obtaining addressee consent by clicking the Requesting Consent tab:

Move Type	Customer ID	Addressee	Description	Start Date
	1821355	VERNON H C V 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
	2561355	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

When the addressee responds to the consent request, you can accept, reject, or manually change the address as needed. For more information, see [“Approving or Rejecting Address Changes”](#) on page 10 and [“Manually Changing an Address”](#) on page 12.

Your Aura administrator may have enabled automatic consent. If automatic consent is enabled Aura will assume that the addressee consents to the change if the addressee does not respond to the consent letter within a certain period of time. For example, your administrator may have enabled automatic consent with a period of 30 days. If an addressee does not respond to consent request within 30 days, the address change will be accepted automatically. Contact your Aura administrator to find out if automatic consent is enabled on your system.

## Manually Changing an Address

Follow these instructions to manually change an address from the search results screen.

1. Click the Addressee name or Customer ID you wish to change.
2. On the *Address Validation* page, manually add or change address information in the **New mailing address** section.
3. Click **Advanced Action** to add a new participant, put the address on hold, and so on.
4. Click **Approve**.

## Assigning Address Records to Another User

You can reassign address records assigned to you to another user if you are not the right person to review and approve/reject the address change.

1. Click the **Review** tab.
2. In the left column, check the box for each address record you want to assign to another user. You can select one or multiple records.
3. In the **More Actions** field, select **Assign**.
4. Click **OK**.
5. In the **New Participant(s)** field, add the Aura user name of the user to whom you want to assign the address record. To add the user name,
  - a. Click **Find User**.
  - b. On the Person Search screen, fill in one or more of the following fields:
    - **User ID**
    - **First Name**
    - **Last Name**
    - **Email**
    - **Phone**
    - **Fax**
    - **Group**
  - c. Click **Search** to produce a list of matching users displaying their User IDs, First Names, and Last Names.
  - d. Click User ID, First Name, or Last Name of the person whom you want to add in the **New Participant(s)** field.
  - e. Click **Close**. The added person will be displayed in the **New Participant(s)** field.
6. If you want to delete an already added person, select that user and click **Remove**. Follow the instructions in the previous step to add some other user.
7. In the **Message** field, type a message to send to the user who will now be responsible for the address record. For example, you may include an explanation of why the address record is being assigned to the person.
8. Click **Send**. The person to whom you assigned the record will receive an email notification.

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**NOTE:** Do not attempt to reassign records by directly modifying the Aura database. Use the above procedure only.

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## Viewing Approved or Rejected Addresses

To review and approve address changes, complete the search tool to search Aura documents or workflows for addresses that have been approved or rejected.

1. Click the **Review** tab and then the **Completed** tab from within the *Address Management* page.

2. Click the **Show Options** icon to show search fields.



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**NOTE:** Click this same icon again to hide search fields.

---

3. Complete the **Start Date** and **End Date** fields as desired to define your search.
4. Complete the **Customer ID** and **Addressee** fields to further narrow the search.










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**NOTE:** Click the magnifying glass (“Find User”) icon if you want to search for a particular addressee. You do not need a complete search string to receive returned results. For instance, entering “a” in the First Name field would yield all first names that begin with “a.”

Click the eraser (“Clear Creator Option”) icon to clear a search you’ve performed.

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- Click **Search**. Any modified addresses found within your search will display below the search fields.

	Customer ID	Addressee	Start Date	End Date	Status
	2200008	ACES PARTY CONCEPTS	Nov 28, 2009	Dec 8, 2009	Approved
	2200009	ACEVES	Nov 28, 2009	Dec 8, 2009	Approved
	2200010	CLARA ADAIR	Nov 28, 2009	Dec 8, 2009	Approved
	2200014	ADVANCED REGIONAL SYSTEMS	Nov 28, 2009	Dec 8, 2009	Approved
	2200015	AERO INC	Nov 28, 2009	Dec 8, 2009	Approved
	2200016	ERNEST C AFIF	Nov 28, 2009	Dec 8, 2009	Approved
	2200011	ELIZABETH ADAMI	Nov 28, 2009	Dec 8, 2009	Approved
	2200012	DONALD MARGARET ADAMS	Nov 28, 2009	Dec 8, 2009	Approved
	2200013	ADUCO CO	Nov 28, 2009	Dec 8, 2009	Approved

- **Customer ID**—the unique ID for the customer, such as an account number
- **Addressee**—represents the identification number of the address that was modified, such as an account number
- **Start Date**—shows the date the record was created in Aura
- **End Date**—shows the date the address was approved or rejected
- **Status**—shows whether the address was approved or rejected

## The Process Manager

If you need more information regarding an approved or rejected address, click the Customer ID or Addressee name. On the Address Validation screen, when you click the Advanced Action button, the *Process Manager* page opens, showing information about that particular item. Not all elements will appear on every screen; they vary depending on the stage of the record. The stages include Decision Stage, Sequence Stage, and End Stage.

### Decision Stage

Table 1: Process Manager Screen (Part 1 of 3)

Element	Description
Assign New Participant	Designates someone to perform a task. For more information on how to assign new participant, see <a href="#">Assigning Address Records to Another User</a> .
Hold	Places record on hold and prevents it from being approved or rejected.
Unhold	Releases record from hold and allows it to be approved or rejected.
Request Further Information	Sends an e-mail or IM to a participant.

Table 1: Process Manager Screen (Part 2 of 3)

Element	Description
Add Document(s)	Adds documents from the server or local files to the current workflow.
Send Summary	Sends the Process Summary to other participants.
Back	Returns you to the Address Management screen.
Process Name	Shows the name of the record you're reviewing.
Template Name	Shows the name of the template the record you're reviewing is using.
Digitally Sign	Shows that the record is digitally signed.
Approve	Approves the workflow stage and sends the moderator and next-stage participants an e-mail or IM.
Reject	Rejects the workflow stage and sends the moderator an e-mail or IM.
Incoming Documents	Returns you to the <i>Address Validation</i> page and shows the record in the Address Correction and Approval screen.
Status	Shows the status of the record (approved or rejected).
Activity	Shows the Workflow Transaction for the record you're reviewing.
Participant(s)	Shows the participant who was involved in the workflow of the record.
User Name	Shows the user ID of the person who submitted a document.
Login ID	Shows the login ID of the person who submitted a document.
Date	Shows the date the activity or document was submitted.
Receiver	Allows you to request information, such as additional documents, from the user (receiver). Use the <b>Find User</b> button to search for a particular user, and use the <b>Remove</b> button to remove a receiver.
Email address	Contains the email addresses of anyone entered in the <b>Receiver</b> field.
Comments	Allows you to enter any comments associated with the document or activity.
Spell Check	Performs spell check on the comment.
Attachment	Shows any attachment you add to the record.



Table 1: Process Manager Screen (Part 3 of 3)

Element	Description
Browse	Allows you to search for attachments to add to the record.
Submit	Allows you to submit the changes for that record or submit documents or attachments that have been added.

### Sequence Stage

Table 2: Process Manager Screen (Part 1 of 2)

Element	Description
Assign New Participant	Designates someone to perform a task. For more information on how to assign new participant, see <a href="#">Assigning Address Records to Another User</a> .
Hold	Places record on hold and prevents it from being approved or rejected.
Unhold	Releases record from hold and allows it to be approved or rejected.
Request Further Information	Sends an e-mail or IM to a participant.
Add Document(s)	Adds documents from the server or local files to the current workflow.
Send Summary	Sends the Process Summary to other participants.
Back	Returns you to the Address Management screen.
Process Name	Shows the name of the record you're reviewing.
Stage Name	Shows the stage of the record you're reviewing.
Template Name	Shows the name of the template the record you're reviewing is using.
Schedule	Shows the date the record was processed.
Review	Advances edited file to next stage.
Digitally Sign	Shows that the record is digitally signed.
Incoming Documents	Returns you to the <i>Address Validation</i> page and shows the record in the Address Correction and Approval screen.
Status	Shows the status of the record (approved or rejected).

Table 2: Process Manager Screen (Part 2 of 2)

Element	Description
Stage	Shows the stage of that record in the workflow: <ul style="list-style-type: none"> <li>• Start</li> <li>• Decision</li> <li>• End</li> <li>• Stop</li> </ul>
Activity	Shows the Workflow Transaction for the record you're reviewing.
User Name	Shows the complete list of user names involved in the approval/rejection process.
Login ID	Shows the complete list of user IDs involved in the approval/rejection process.
Date	Shows the date the activity or document was submitted.
Comments	Allows you to enter any comments associated with the document or activity.
Spell Check	Performs spell check on the comment.
Attachment	Shows any attachment you add to the record.
Browse	Allows you to search for attachments to add to the record.
Submit	Allows you to submit the changes for that record or submit documents or attachments that have been added.

### End Stage

Table 3: Process Manager Screen (Part 1 of 2)

Element	Description
View Summary	Shows the summary.
Send Notification	Sends an e-mail or IM to the designated participants.
Send Summary	Sends the Process Summary to other participants.
Back	Returns you to the Address Management screen.
Process Name	Shows the name of the record you're reviewing.
Template Name	Shows the name of the template the record you're reviewing is using.
Digitally Sign	Shows that the record is digitally signed.

Table 3: Process Manager Screen (Part 2 of 2)

Element	Description
Incoming Documents	Returns you to the <i>Address Validation</i> page and shows the record in the Address Correction and Approval screen.
Status	Shows the status of the record (approved or rejected).
Stage	Shows the stage of that record in the workflow: <ul style="list-style-type: none"> <li>• Start</li> <li>• Decision</li> <li>• End</li> <li>• Stop</li> </ul>
Activity	Shows the Workflow Transaction for the record you're reviewing.
User Name	Shows the user ID of the person who submitted a document.
Login ID	Shows the login ID of the person who submitted a document.
Date	Shows the date the activity or document was submitted.
Receiver	Allows you to request information, such as additional documents, from the user (receiver). Use the <b>Find User</b> button to search for a particular user, and use the <b>Remove</b> button to remove a receiver.
Email address	Contains the email addresses of anyone entered in the <b>Receiver</b> field.
Message	Allows you to enter information for requesting additional documents.
Attachment	Shows any attachment you add to the record.
Browse	Allows you to search for attachments to add to the record.
Submit	Allows you to submit the changes for that record or submit documents or attachments that have been added.
Approve Reviewers	Allows you to determine who will receive the approved activities in the <b>Pending</b> tab and have rights to approve it. Use the <b>Remove</b> button to remove a receiver.
Reject Reviewers	Allows you to determine who will receive the REJECTED activities in the <b>Pending</b> tab and have rights to approve it. Use the <b>Remove</b> button to remove a receiver.
Approve	Approves the workflow stage and sends the moderator and next-stage participants an e-mail or IM.
Reject	Rejects the workflow stage and sends the moderator an e-mail or IM.

## Update Reviewed Addresses

After address modifications by address validation software and review (approve or reject) of the changes, Aura allows you to update your customer information system with reviewed address changes. Aura then stores the processed data in the database with the appropriate status codes. To update the reviewed addresses, click **Update Reviewed Addresses**.

## Viewing Reports

To view reports, click the **Reports** tab. There are three reports:

- **Customer(s) Account Status Report**—This report allows you to look up the status of an address change using an account number. To view this report, enter the **Customer ID** and click **Next**.
- **Address Owner Summary Report**—This report shows the number of addresses that are in each address owner's queue.
- **Aura Summary Report**—This report shows the number of addresses in each status (automatically approved, automatically rejected, approved by address owner, rejected by address owner, modified and approved by address owner).



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