

Release Notes

Aura 1.6.0

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This document contains information about the Aura 1.6.0 release. You have access only to the modules you have licensed. To evaluate any other modules, contact your Pitney Bowes Software sales executive for a trial license key.

Complete documentation can be found on the Aura Documentation CD. You can also find complete documentation online at www.g1.com/support/.

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Purpose

Aura is a solution that automates the cumbersome manual process of correcting customer addresses. It is designed to help companies ensure that address changes are handled through a workflow. It documents the process that maintains the most current contact information while complying with industry standards and regulations.

Scope

This document describes Aura Version 1.6.0 for customers, pre-sales, services, support team and other internal teams.

System Requirements

Operating systems supported

Aura application - Aura 1.6.0

OS - Windows Server 2008 (Enterprise Edition), SP1 32-bit, 64-bit

Browser - IE 6.0/7.0/8.0, Firefox 2.0/3.0

SQL Server - SQL Server 2008 Enterprise 32-bit, 64-bit

Compatible Products

- MAIL360 Data Manager 2.2.0
- Code1Plus 3.6
- VeriMove 3.5.1
- Sagent DataFlow 6.7.1 32-bit, Sagent 6.6 64-bit
- Active Directory

NOTE: If you are planning to use both, MAIL360 and Aura, then you are recommended to install the Aura application on a separate machine for getting better performance of the application.

Pre-requisites

- JDK1.5
- Apache Tomcat 5.5

- .Net Framework 3.5
- Microsoft SDK
- SQL Server 2008 Enterprise

Known Issues Limitations and New Features

Known Issues

- Create User Screen is refreshed when user clicks on validate button. (Aura-641)

New Features and Enhancements

This release contains the following new and changed features:

- [Enhanced Nixie Support](#)
- [Improved Performance in Reviewing](#)
- [Improved Performance in Loading Records](#)
- [Workflow Data Purge](#)
- [Automatic Coder Rules Creation](#)
- [Pending Records](#)
- [Transaction Support](#)
- [Sagent 6.7.1 Support](#)

Enhanced Nixie Support

You will experience an enhanced Nixie support. With previous releases, you could import ACS (Nixie/COA) and CASS data from MAIL360 Data Manager. In this release, you will also be able to import Nixie data exclusively. This Nixie data can be exported to third-party systems for processing in their workflows.

Improved Performance in Reviewing

You will experience improved performance in viewing records on the Review tab.

Improved Performance in Loading Records

You will experience improved performance of the application in loading workflow records in the database.

Workflow Data Purge

You will be able to purge the processed workflow data from the Aura database based on the retention policy of your organization. You can specify the retention policy in

a configuration file, **oe.cfg** located in the Tomcat installation directory. Default retention policy will be of 12 months. To perform the purge activity, you need to have privileges of a super user.

Automatic Coder Rules Creation

For all the coders, such as VeriMove™, CASS™, and ACS™, coder rules will be automatically created while creating a new domain.

Pending Records

You will be able to review (accept/reject) while a new CASS™/ACS™/NCOA™ file is being submitted in the Aura workflow and records are getting processed at the backend.

Transaction Support

Aura application has been enhanced to support concurrent transactions (application and Sagent side). If you are running multiple operations and any of them fail, then automatic rollback occurs to avoid any data discrepancy.

Sagent 6.7.1 Support

This release of Aura will support Sagent 6.7.1 on both, 32-bit and 64-bit operating systems.

Installation

For complete instructions on installing Aura 1.6.0, including system requirements, see the *Aura™ Installation Guide* available on the Aura Documentation CD. Do not use installation procedures from previous releases.

Required Documentation

The following documentation is available at www.g1.com/support/. Contact our technical support group to obtain a password and user ID if you have not done so previously.

- *Aura™ Installation Guide*
- *Aura™ User's Guide*
- *Aura™ Administrator's Guide*

Upgrading from Aura 1.5.1 to 1.6.0

If you have Aura 1.5.1 version already installed in your environment, you may need to upgrade from version 1.5.1 to version 1.6.0. To upgrade, you need to uninstall the 1.5.1 version and then run the 1.6.0 version installer provided in the Aura 1.6.0 Installation Disk. After successfully upgrading from 1.5.1 to 1.6.0, you have to migrate data from the Aura databases.

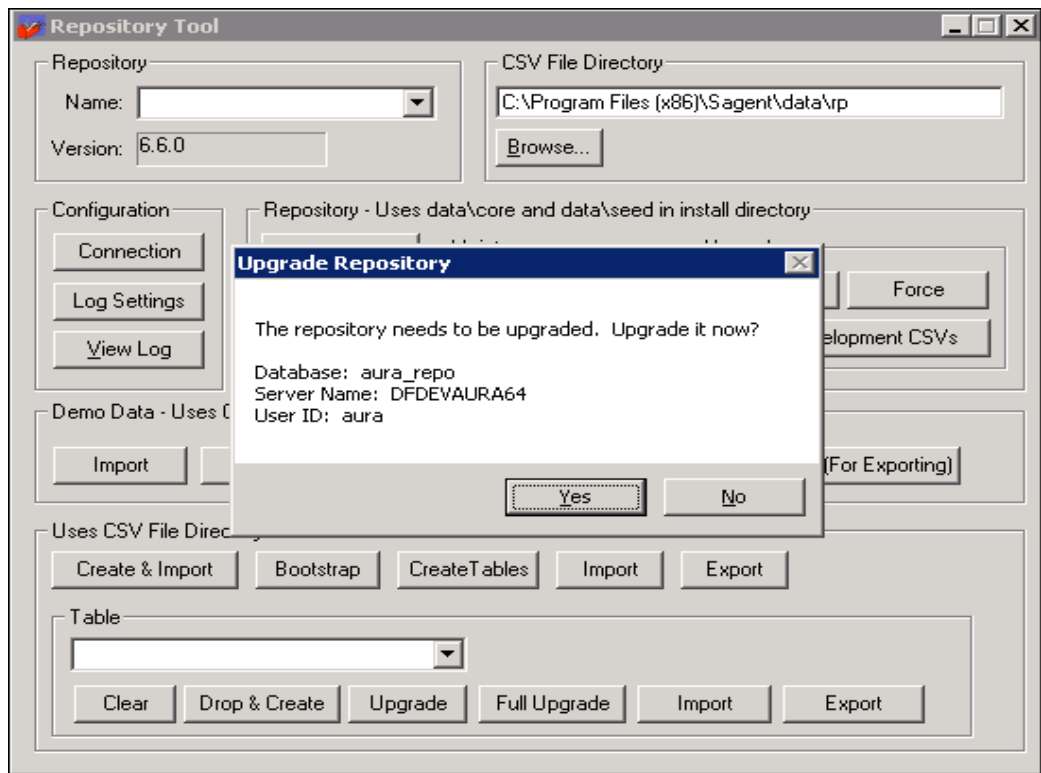
Before, you proceed with the data migration, you need to consider the following assumptions:

- Aura 1.5.1 is already installed on the Client machine.
- Aura 1.6.0 will be installed in the same directory location where Aura 1.5.1 has been installed.

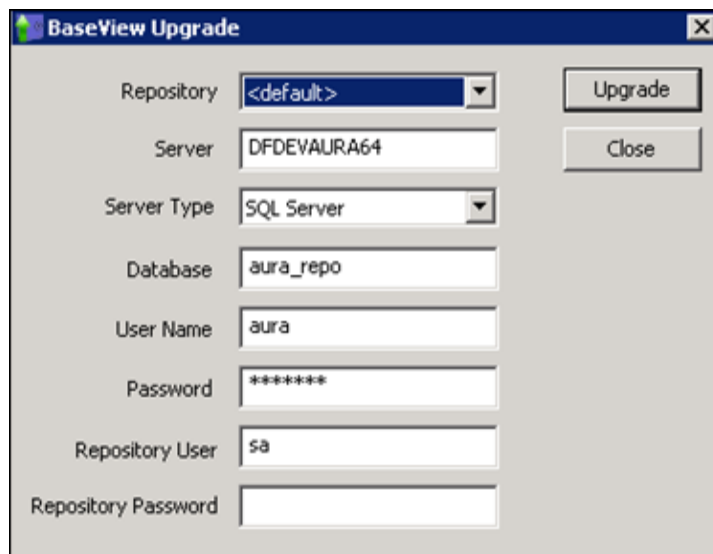
To migrate the Aura databases, complete the following steps:

1. Run the database scripts located in the '**...\Data Migration from Aura 1.5.1 to Aura 1.6\Aura1.6Sqlscript**' directory of the Aura Installation Disk in the following order:
 - 1_AuraNixie_Table.sql
 - 2_AuraNixie_Data.sql
 - 3_performance_auracmd_wf.sql
 - 4_identity_handling_all_scripts_1.sql
 - 5_identity_handling_all_scripts_2.sql
 - 6_multiple_aura_cmd.sql
 - 7_WF_DataPurge.sql
 - 8_Domain_Create.sql
 - 9_Sagent_Transaction_Trigger.sql
 - 10_Schedular_Plan_Trigger.sql
2. Create backup of the '**files**' folder located at the path "**<Aura1.5.1 Installation Path>\openedms\edms**".
3. Uninstall Aura 1.5.1 and then install Aura 1.6.0 at the same path where Aura 1.5.1 was installed. How to install Aura 1.6.0, see *Aura Installation Guide*.
4. Paste the '**files**' folder that you saved as backup in the "**<Aura1.6.0 installation Path>\openedms\edms**" folder.
5. Create backup of the previous version (1.5.1) of the aura_repo database.
6. To upgrade the aura_repo database, run the '**sainrp**' command on the Command Prompt.

7. In the *Upgrade Repository* confirmation box, click **Yes**.



8. In the *BaseView Upgrade* dialog box, enter your **Repository Password** and click **Upgrade**.

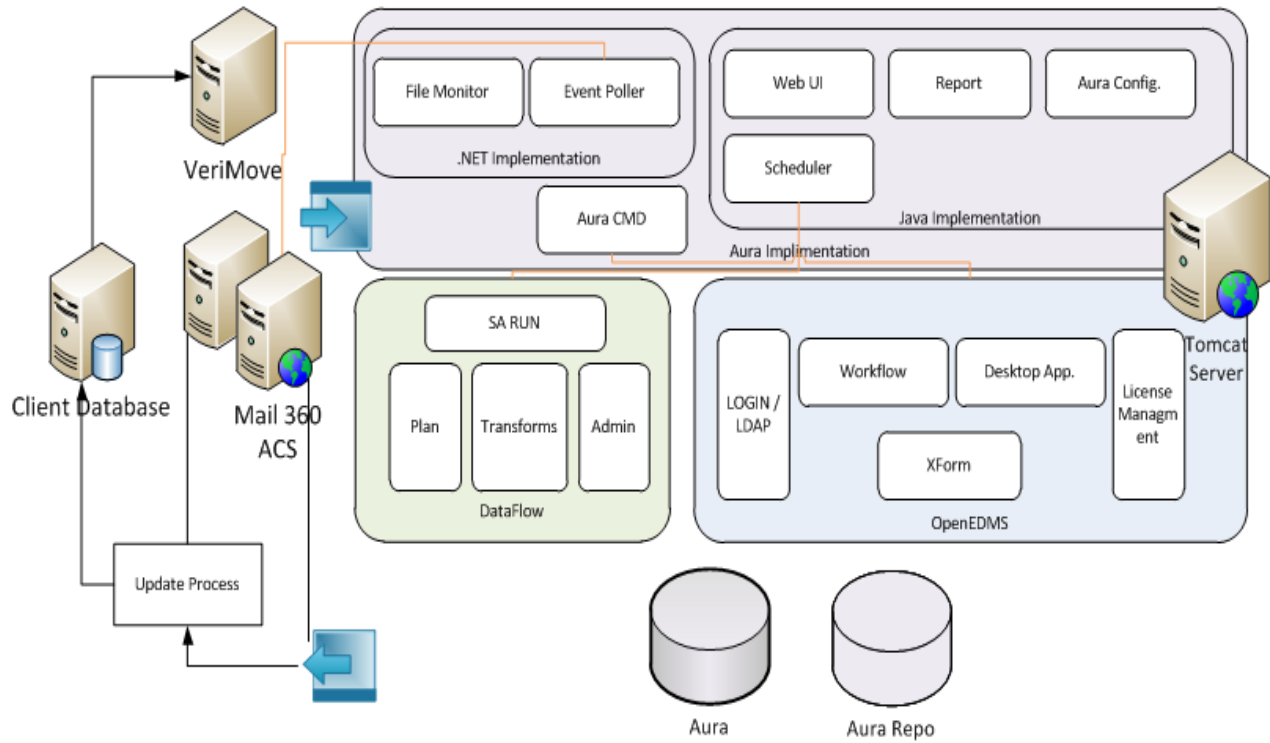


9. Click **OK**.

10. Click **Close** to finish the process.
11. Import all the plans from the '**...\Data Migration from Aura 1.5.1 to Aura 1.6\Aura_repo_Plans\Main Plans**' directory of the Aura Installation Disk. To import the plans:
 - a. Run the '**saisd**' command to open Sagent Design Studio.
 - b. Click **File -> Import Plan Definition**.
 - c. Browse the **Main Plans** folder of the Aura Installation Disk and select the plan to be imported.
 - d. Click **Open**.
12. If you have made any changes to the plans you were using in the previous version, then incorporate those changes in the newly imported plans and save them.
13. Delete the previous plans from the **Bin Explorer** of the Sagent Design Studio. Also, delete them from the Recycle Bin of Sagent.
14. Repeat [Step 11](#) to [Step 13](#) to import and save the Scheduler plans from the '**...\Data Migration from Aura 1.5.1 to Aura 1.6\Aura_repo_Plans\Schedular_Plans**' directory of the Aura Installation Disk.
15. If you access MAIL360 Data Manager database to fetch ACS/CASS records, you need to run the following scripts on the database. You can locate these scripts in the '**...\Mail360Procedures**' directory of the Aura Installation Disk.
 - ACS_ADDRESS_CHANGES.sql
 - ACS_NIXIES_INPUT.sql
 - CASS_OUTMAILPIECES.SQL

APPENDIX

Aura System Architecture



Aura Implementation

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 OpenEDMS 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)

OpenEDMS

Aura uses OpenEDMS for workflow management for addresses that require review by address owners. OpenEDMS handles e-mail 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.

Workflow

Workflow is a powerful tool to establish 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.

User can create and customize their own workflow as per their business requirements. Workflow supports records submission, review, approval, and request consent.

Reports

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.
- 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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