Confirm®

Confirm web Interface

v19.10c.AM
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April 09, 2019
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Confirm web Interface

Confirm web interface enable users to access the available functionalities through a web browser.

**Supported Platforms:**

<table>
<thead>
<tr>
<th>O/S</th>
<th>Version</th>
<th>Support Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server</td>
<td>2008 SP2 32-bit and 64-bit</td>
<td>Current</td>
</tr>
<tr>
<td></td>
<td>2008 R2 SP1 64-bit</td>
<td>Current</td>
</tr>
<tr>
<td></td>
<td>2012 64-bit</td>
<td>Current</td>
</tr>
<tr>
<td></td>
<td>2012 R2 64-bit</td>
<td>Current</td>
</tr>
</tbody>
</table>

**Note:** For Windows Server 2008 SP2 (32-bit and 64-bit) an additional prerequisite Hotfix KB-980368 - IIS7.0 & IIS7.5 is required.

**Supported Web Browsers:**

<table>
<thead>
<tr>
<th>Browser Name</th>
<th>Version</th>
<th>Support Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome</td>
<td>Latest</td>
<td>Current</td>
</tr>
<tr>
<td>Microsoft Internet Explorer</td>
<td>11</td>
<td>Current</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>Latest</td>
<td>Current</td>
</tr>
<tr>
<td>Microsoft Edge</td>
<td>Latest</td>
<td>Current</td>
</tr>
</tbody>
</table>

Following capabilities are available through Confirm web interface:

**Confirm Strategic Asset Management**

Confirm Strategic Asset Management is a web based application that allows asset managers predict long term condition of their assets using current condition and applying algorithms. It also allows asset managers to assess cost of maintenance over long term to meet their service levels.

Confirm Strategic Asset Management application has three main parts: Model, Data and Analysis.

Model allows user to create asset groups and rule sets which are input to algorithms determining long term condition and cost analysis.

Data allows user to provide asset group quantity, initial condition and unit cost of treatment distribution which is used during Analysis. Application has the capability to pull asset and initial condition attribution data from Confirm.

Analysis allows user to create scenarios or treatment strategies to assess long term condition and expenditure for a scenario. Before carrying out any Analysis, a set of Model and Data is required.

The flowchart below describes the functionality of Confirm Strategic Asset Management application at high level.
Confirm web Interface

Confirm Dashboard
Confirm Dashboards are now accessible in web through Chrome browser. This enables user to access dashboard anywhere, anytime. Also, The ability to switch between Dashboards is now available from the drop down on the Dashboard screen.

Confirm Customer Services
The Customer Services functionality on web allows to search for an enquiry. The user can view an enquiry from the searched list and update the assigned action officer, status or notes of the enquiry.

Confirm Stock Control
The Stock Control functionality on the web allows you to manage stock levels at multiple stock locations.

CentralEnquiries API
CentralEnquiries API is deployed with Confirm web interface. It enables to send document attachments to an Enquiry in Confirm from external CRM systems.

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</tr>
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<tr>
<td>Confirm Stock Management</td>
<td>39</td>
</tr>
<tr>
<td>Confirm Web Settings</td>
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</tr>
<tr>
<td>Confirm CentralEnquiries API</td>
<td>46</td>
</tr>
<tr>
<td>Frequently Asked Questions</td>
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Installing, Configuring and Upgrading the Confirm web interface

Introduction
The purpose of this document is to detail the installation instructions for the Confirm web interface. Confirm web interface is a multi-tenant web service which allows to connect to multiple databases.

Confirm web interface supports side by side installation to deploy two different versions of web interface on same server at a time. To support the side by side installation two separate installers are provided as ‘ConfirmWeb’ and ‘ConfirmWeb Beta’. This will provide two independent URLs exposing functionality available for their version. This may be useful in upgrading one installer and adapting selected users to new functionality before exposing all users to upgraded version.

Confirm web interface is backward compatible from v16 onwards. This means Confirm web interface can be installed for any Confirm DB version from v16 onwards without upgrading the database.

This document describes the process of deployment of Confirm web interface. The steps of installation are common for both ConfirmWeb installers.

Note that both ‘ConfirmWeb’ and ‘ConfirmWeb Beta’ are installed in separate directories, uninstall or upgrade of one will not affect the other.

Prerequisites
Ensure that the following prerequisites are installed prior to configuring the Confirm web interface:

- If installing the Web Service on a 32 bit system please refer to the IIS Configuration Required for 32 bit Systems page for more details.
- Ensure that Web Server IIS role is installed.
- Visual C++ 2010 redistributable.
- .Net Framework 4.6
- The MapXtreme 9.1 Redistributable must also be installed on the machine.
- For Windows Server 2008 SP2 (32-bit and 64-bit) an additional prerequisite, Hotfix KB-980368 - II7.0 & IIS7.5 is required.
- The version of the Confirm web interface must be greater than or equal to the database they are serving.

These prerequisites are available within the Prerequisites directory of the Confirm media.

NOTE: It is a best practice, and highly recommended, to use HTTPS deployment for ConfirmWeb.

Installation
Run the following steps to install Confirm web interface:

- Run the ConfirmWeb.exe and specify a location to install the web service. The default location is set to C:\inetpub\wwwroot\Confirm\ConfirmWeb.
Enabling the Confirm UEIP checkbox will allow both Web Service and Client to send anonymous usage information to Pitney Bowes to help us improve our products and services.

**Note:** When the installation is completed you will to reboot the ConfirmWeb server so that the environment path is updated.

### Configuring an Application Pool

It is advisable to create a new application pool for the Confirm web interface. If setting up more than one web service, ensure that a unique application pool is created for each instance.

To create an application pool, go to the IIS Manager and right click on the Application Pools option and select Add Application Pool. Ensure that the following settings are applied to the new application pool.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>.Net Framework</td>
<td>Set to 'v4.0'</td>
</tr>
<tr>
<td>(Applicable for 64 bit machines only) Enable 32-Bit Applications</td>
<td>Set to 'True' (This is set in the 'Advanced Settings'.)</td>
</tr>
<tr>
<td>Managed Pipeline</td>
<td>Set to 'Integrated'</td>
</tr>
<tr>
<td>Identity</td>
<td>To view attachments on Job Tasks within Confirm-Workzone® an identity will need to be set here with the appropriate permissions to access the document store location.</td>
</tr>
</tbody>
</table>
Creating the Web Service Application

Now the files have been installed the web service application can be created. To do this, open the Internet Information Services (IIS Manager) and navigate to Sites. Then right click on Default Web Site and select Add Application.
The **Add Application** window will appear.

![Add Application window](image)

- Set the **Alias** to the name you would like for your Web Service.
- Set the **Application pool** to the application pool initially created.
- Set the **Physical Path** as the folder where the Web Service files are stored.
- Finally click on **OK** to create the application.

**Side by Side Installation**

Run the following steps to install ConfirmWeb Beta Interface:

- Run the `ConfirmWebBeta.exe` and specify a location to install the web service. The default location is set to `C:\inetpub\wwwroot\Confirm\ConfirmWebBeta`
- Enabling the **Confirm UEIP** checkbox will allow both Web Service and Client to send anonymous usage information to Pitney Bowes to help us improve our products and services.

**Note:** Please follow steps from Installation section to complete the setup. And also when the installation is completed you will have to reboot the ConfirmWeb server so that the environment path is updated.

**Registry Configuration**

There are some registry settings that need to be configured on the ConfirmWeb Server, as follows:

<table>
<thead>
<tr>
<th>O/S Type</th>
<th>Registry Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>32 bit Machines</td>
<td>HKEY_LOCAL_MACHINE\SOFTWARE\Pitney Bowes\Confirm</td>
</tr>
</tbody>
</table>
## Confirm Web Interface

### Registry Location & O/S Type

<table>
<thead>
<tr>
<th>O/S Type</th>
<th>Registry Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>64 bit Machines</td>
<td>HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\PitneyBowes\Confirm</td>
</tr>
</tbody>
</table>

The following settings are applicable to all Confirm Components:

<table>
<thead>
<tr>
<th>Registry Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CfgFile</td>
<td>Path to Database configuration file.</td>
</tr>
<tr>
<td>AuthProviderType</td>
<td>• Confirm - To Use Confirm Authentication.</td>
</tr>
<tr>
<td></td>
<td>• ActiveDirectory - To Use ActiveDirectory.</td>
</tr>
</tbody>
</table>

The following settings are applicable to ConfirmWeb only:

<table>
<thead>
<tr>
<th>O/S Type</th>
<th>Registry Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>32 bit Machines</td>
<td>HKEY_LOCAL_MACHINE\SOFTWARE\Pitney Bowes\Confirm\Web</td>
</tr>
<tr>
<td>64 bit Machines</td>
<td>HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Pitney Bowes\Confirm\Web</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Registry Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LogFile</td>
<td>Path and Filename of the log file.</td>
</tr>
<tr>
<td>LoggingEnabled</td>
<td>Enable provider logging on or turn it off. (Yes/ No).</td>
</tr>
</tbody>
</table>

### Checking the Web Service is Configured Correctly

IIS will need to be restarted to ensure changes have been made. To do this right click on the Web Server connection in the IIS Manager and opt to stop and then start.

The Web Service can be tested by performing these actions:

1. Open the IIS Manager and ensure that the Content view is enabled.
2. In the connections panel of the manager navigate to %Server% > Sites > Default Web Site > %ConfirmWeb%
3. In the SAM / Dashboard / CustomerServices / Settings / Workzone folder(s) you will find an Index.html file. Right click on the file and select Browse.
4. Ensure Cookies are enabled in your browser.
5. The default web browser will start to load the page. The ID of the Confirm database you want to connect to will need to be inserted to the URL after index.html (?tenant=%database ID%) as shown in the examples below.
6. Refresh the browser to connect to the web service. If successful, the login screen will appear in the browser.
7. Login using a valid Confirm Username and Password.

### Example URLs:

**Confirm Dashboard URL:** https://ConfirmWebServer/ConfirmWeb/Dashboard/index.html?tenant=TestDB#/login

**Confirm Strategic Asset Management URL:** https://ConfirmWebServer/ConfirmWeb/SAM/index.html?tenant=TestDB#/login

ConfirmWeb Map Symbol System Settings URL: https://ConfirmWebServer/ConfirmWeb/app/index.html?tenant=TestDB#/settings

ConfirmWorkzone® URL: https://ConfirmWebServer/ConfirmWeb/Workzone/index.html?tenant=TestDB

Confirm Stock Control URL: https://ConfirmWebServer/ConfirmWeb/app/index.html?tenant=TestDB#/stockcontrol

**Note:** Replace TestDB with the database ID found in the database configuration file, the location of which is specified in the registry. Any spaces in the URL will be represented as %20. Some browsers make this change automatically but some do not and the URL will need to be amended manually.

### Upgrading the Web Service

Follow these steps in order to upgrade the Web Service

1. Ensure all users are logged out of the Confirm web interface.
2. Stop the Web Service.
3. Run ConfirmWeb.exe to upgrade.
4. Restart the Web Service.
5. Clear any browser caches.

### IIS Configuration Required for 32 bit Systems

**Note:** The following section is only required for 32 bit operating systems. For 64 bit systems, please ignore this section.

#### Set ISAPI and CGI Restrictions for ASP.NET V4

Select **ISAPI and CGI Restrictions** and in the screen that opens there will be two .dll files relating to ASP.NET v4.0.30319. Right-click on both .dll files and select **Allow**.

#### Other IIS Configurations

Some of the IIS Web Servers may not have File name extension ".json", ".woff" and ".woff2" added to Mime Types which can cause Confirm web interface to behave erratically. This section describes additional configurations required allow the application to work properly.

**Set the .json, .woff and .woff2 Mime Types**

Open IIS Manager, select Web Server name and ensure **Features View** is selected.
On the right hand panel double click *Mime Types* and check if there are entries for `.json`, `.woff` and `.woff2`.

If there are any missing entries then add the corresponding entry on the Mime Types screen.

For example to add `.json`, right click on Mime Types screen and select *Add*. On the screen that follows set the *File Name Extension* to `.json` and the *Mime Type* to `application/json`. 
Configuring the Confirm Database

Introduction
Once the web service has been installed and configured there are some Confirm web interface settings that need to be set in the Confirm database.

Configure the Confirm web interface Settings
The Confirm web interface system settings are provided in the Confirm Client under the screen. Any changes to the settings should be made on this screen.

Configure the Confirm Strategic Asset Management User Security
(This is applicable for Confirm Strategic Asset Management only)
The user access can be set in the Confirm Client under user security. There is an entry for Confirm Strategic Asset Management and update access is required for a user to be able to access Strategic Asset Management.

![Program Name Access](image)

Configure the Confirm Customer Services User Security
(This is applicable for Confirm Customer Services only)
The user access can be set in the Confirm Client under user security. The user needs to have view (and update) access to either Fast Entry Enquiries or Fast Entry Issues (both of them are present under Customer Services) to be able to view (and create or edit) an Enquiry on web.
Configure the Confirm Map Symbol System Settings User Security

(This is applicable for Confirm Map Symbol System Settings only)

The Confirm database must be at v17.10 or later to use the Confirm Map Symbol System Settings screen.

The user access can be set in the Confirm Client under user security. The user needs to have update access for Web Map Symbol Settings.

Note: If this permission is not given, the Confirm Map Symbol Settings screen will simply return to the sign in page.

Configure the Confirm Stock Management User Security

(This is applicable for Confirm Stock Management only)

The user access can be set in the Confirm Client under user security. There is an entry for Confirm Stock Management.
• Confirm Stock Management User Access (security). Enables access to Stock Management.
• Confirm Stock Management Admin Access (security). Enables access to the **Stock Management Settings** form.
Checking the Confirm web interface Configuration

Once Confirm web interface has been installed and setup it is recommended that the following actions are carried out to ensure that the system has been setup correctly.

1. Check that you can get to the login screen via the configured URL
   Using one of the supported browsers you should be able to view the login screen. If there is a problem check the following:
   • Check the Tenant ID name is correct in the URL and matches a database connection name in the Confirm web interface configuration file.
   • Ensure any spaces in the URL are represented as %20. Some browsers convert spaces automatically but some do not.
   • Ensure that the browser version you are using is supported.
   • Check that the Web Service is started and functioning. Try restarting the Web Service.
   If the login screen appears then the Confirm Web Service is working. If there are still issues viewing the login screen refer to the Web Service Install guide.

2. Check you can log onto Confirm web interface successfully with a valid Confirm user
   If you are unable to login into Confirm web interface with your chosen Confirm user check the following:
   • Error messages will appear on the screen if an invalid Confirm User Login Name or password is used. Check the user login details within the Confirm Client to clarify details.
   • Check that the URL has the correct database connection name.
   • Check that the user is not locked out in the Confirm Client.
Sign-In

The User Guide section will help users to get started with using Confirm web Interface. Browse to the URL provided by the Confirm Administrator. A login screen like below will be displayed:

![Login Screen]

Enter a valid Username and hit Continue, this will display the password field. Enter the password to login to Confirm web Interface.

**Note:** In case of Single Sign-On, password field will not be displayed on Confirm web Interface; instead user will be redirected to configured Identity Provider of the organisation for authentication.
Confirm Strategic Asset Management

Confirm Strategic Asset Management allows asset managers to predict long term condition of their assets using current condition and applying algorithms. It also allows asset managers to assess cost of maintenance over long term to meet their service levels.

The flowchart below describes the functionality of Confirm Strategic Asset Management application at high level.

Confirm Strategic Asset Management application has three main parts:

Model
Data
Analysis

Landing Page

On successful sign in, user will be redirected to the landing page of Confirm Strategic Asset Management, like below:
Start button will take user to the main application.

**Note:** Do not show this again: ticking will skip the landing page for user on all subsequent login.

**Model**

Creating Model is the first step in using Confirm Strategic Asset Management. A Model in Confirm Strategic Asset Management provides user with the capability to define the asset groups that need to be worked with, the probable conditions they may be in and treatment types applicable to them. This enables the application with the asset groups and rule sets which are input to algorithms determining long term condition and cost analysis.

Click Add button to start creating a Model.

**Linked Model or Independent Model**

A Model can either be linked to Confirm feature group or created independently. Model Name can be specified in [New Model] placeholder.
A linked Model is one which can refer to a Feature Group in Confirm to get all the asset and condition information. To create a Confirm Linked Model, user needs to choose a Confirm Feature Group from a list of Feature Group displayed.

Link Button: Links the selected Feature Group to the Model and proceeds to selecting the Observation Types (which have been enabled for Condition Assessment in Confirm) to be selected, for the linked Confirm Feature Group.

Skip Linking to Confirm: Use this option to create an independent Model which is not linked to Confirm Data. This option will take user to Model creation.

Select Observations

This page is available only for linked Model. The observation types associated with selected Feature Group and marked for Condition Assessment in Confirm, are available for selection.

Apply: links the selected observation type to the Model being created
Skip Observation: Use this option to not link any observation type to the Model being created

Model Creation

Model creation requires Asset Groups, Conditions and Treatment Types to be defined:
Measurement Attribute: Available only for Confirm Linked Model. Allows to select a measurement attribute that will be used to fetch asset quantity for the asset groups defined. We should also discuss about Units. This is automatically populated for Linked Model but is a selectable dropdown for Independent Model.

Has Width: Checking will consider Asset Groups as having width and user can specify width against each asset group. We should mention that for linked model this will be enabled only for linear assets.

**Expression builder:** Expression builder is available for Asset Groups and Conditions for Confirm Linked Models. It allows user to define an expression which is used to bring data from Confirm and assign corresponding Asset Quantity and Condition distribution value (in Data tab) for the Model.

Following columns are available and in that order in the expression builder to create expressions:
- Feature ID, Site Code, Site Name, Location, Feature Type, Area Code, Contract Area, Classification.

Except Feature ID, Site Name and Location, all other columns use their value code as defined in Confirm lookups for expression evaluation. All Measurement Attributes and Primary Measurement of Feature Group can also be used to create expressions. Condition Observations selected while creating Model can also be used to create expression. Additionally, all user defined pick list attributes are also available to create expression.

The measurement attributes, observations and user defined pick list attributes are evaluated for the value stored in them.

The operations and functions as available in expression builder can used to create expressions. The column value for a non-numeric field need to be specified within double quotes "" for a valid expression.

**Asset Groups:** The asset categorization according to which they need to be analyzed over a period of time.

Asset Group: Name of the Asset group being created.
Average Width: Enabled only if ‘Has Width’ has been checked. It will be used in treatment costing while doing analysis by multiplying the quantity with the width. It is useful in linear assets like roads that are measure in length but treatment costs are in square units.

Expression: Enabled only for Confirm linked Model. It is used to define expression which will be evaluated against feature group assets and put the quantity against each asset group as per expression. Like in the image above, all assets with Feature Type ‘D1’ and within Contract area ‘PT’ will be put under Test Group 1 and a quantity as per sum of their primary measurement will be assigned to Test Group 1 in Data tab if data is pulled from Confirm.

**Conditions:** the probable condition bands in which an asset class can be in.
Rank: Rank of the Condition. It is ranked from best to lowest, with 1 being the best and is read only.

Condition Score: It is the numerical score assigned for each condition.

Remaining Useful life: Expected Remaining Useful Life of asset defined in years.

Expression: Enabled only for Confirm Linked Model. It is used to define expression which will be evaluated against feature group asset condition. The resulting features’ quantity will be aggregated and put in the Initial Condition against each condition defined. Like in the image above, all assets with Feature Condition having ‘Carriageway Condition’ Observation of value greater than 4, will be considered under Excellent condition within Test Group 1. And a quantity as per sum of their primary measurement will be assigned to Test Group 1 in Data tab if data is pulled from Confirm. The language in this para seems to be cryptic and difficult to understand. This document should be given to a new user in confirm and asked to follow these steps.

Treatment Types: The interventions that can be done with the asset groups while creating Analysis.

Save & Update Matrix will create a Model definition and take user to Matrix page.

Transition Matrix: Transition Matrix within a model is a transition probability matrix in ‘As-is’ state. Transition Matrix determines the probability with which an Asset Group in a Model will remain in current condition if no treatment is applied to it, in one year. It also determines the probability of Asset Group to deteriorate to worse condition(s) in a year if no treatment is applied. The matrix values need to be provided by users.

Treatment Effect Matrix: Treatment Effects Matrix Treatment Effects Matrix determines the effect on condition of an Asset Group when a particular treatment type is applied to it. A treatment type can only keep the condition of Asset Group same or make it better.
Clicking Save on top of the Model page will save metrics and Model creation is now complete.

Data

Data in Confirm Strategic Asset Management provides user with the capability to define the total quantity of an Asset Group and its current condition distribution. It is associated with a Model.

New Data: Placeholder to define Data Name strategy.
Model: Allows to select a Model, for which Data needs to be created.
Preview will create the Data definition and will navigate page to define Data metrices

Get Data: The link is available only for Confirm Linked Model and its associated Data. It will activate the Data fetch from Confirm as per expressions defined in Model for Asset Group and Conditions. The Data fetch may take some time during which

[Syncing...]

will indicate that process is in progress. User may click on

[R]eload View

to check if the process has complete. Once the Data fetch is complete, [Refresh Data] may be used to refresh the data from Confirm database. Any errors during data fetch are reported as Get Data Errors.

Quantity

Will be populated with the Data fetched from Confirm using Get Data. Contains the asset quantity, aggregated by the primary measurement, as per expression of the Asset group in the associated Model. It can also be populated/updated manually, which will always be the case for independent Model based Data.
Initial Condition
Will be populated with the Data fetched from Confirm using Get Data. Contains the asset quantity, aggregated by the primary measurement, as per expression of the Conditions in the associated Model. It can also be populated/updated manually, which will always be the case for independent Model based Data.
If the total condition distribution is not 100% of Asset Quantity, the deviation will be notified. Any distribution more than 100% is not allowed to be saved. Any distribution of less than 100% will be removed from quantity while creating Analysis so as to allow Analysis creation only on condition data available.

Get Data Errors
Get Data Errors are encountered if the expressions in the corresponding model are not calculating the data correctly. This may require re-visiting the expressions and correct them. Following three types of Get Data Errors may come:-

1. Quantity is zero for all asset groups.
2. Some Asset(s) have been counted multiple times for calculating Quantity.
3. Some Asset(s) have been counted in multiple Initial Conditions.

To verify which asset quantity and/or conditions are causing the problem, check the latest output file generated after Get Data or Refresh Data operation. The file ConfirmToSAM_DataSync_[timestamp].csv is generated at the Export File Path specified within ConfirmWeb Settings screen.

Reading the output file:
IsQuantityOverlapped column in file refers to an asset where quantity is being calculated multiple times. IsConditionOverlapped column refers to an asset where the condition is being calculated multiple times. Any TRUE value in these columns will cause the Get Data errors.

Treatment Costs Matrix
Treatment costs matrix defines the unit cost per treatment type per condition for each Asset Group. This unit cost is used in Analysis while projecting expenditure for a treatment strategy.

Analysis
Analysis allows user to create scenarios or treatment strategies to assess long term condition for a given Model and Data set.
New Analysis: Placeholder to define Analysis Name.

Model: Allows to select a Model, based on which Data will be populated, for which Analysis is to be created.

Data: Allows to Select a Data for the Model selected, for which Analysis is to be created.

Base Year: Start year of the Analysis.

Period: No. of years for which analysis output is to be generated.

Show values in Quantity: If checked, the analysis graphs will show value in quantity, else percentage.

Preview will create a blank analysis and allow user to define a Treatment Strategy.

**Treatment Strategy**

Treatment Strategy allows user to create scenario(s) wherein user decides the treatment types that are to be done on an Asset Group, in a given condition. It also allows users to specify the percentage of total quantity of Asset Group that should be covered with a treatment type, in a given condition. Treatment Strategy is formulated per Asset Group.
Asset Group: Allows to select the Asset Group within the Model/Data of the Analysis to create a treatment Strategy.

All the conditions for each Asset Group are available to define a treatment strategy.

Preview: Generates following output graphs, for each Asset Group, based on treatment strategy created for each Asset Group.

**Individual Distribution**

Condition - Do Nothing: It displays the long term condition profile of an Asset Group in case of no treatment strategy in place.

Condition - Treatment Strategy Applied: It displays the long term condition profile of an Asset Group with treatment strategy applied.

Work Quantity Graph: It displays the work done per Asset Group per Treatment Type for the strategy formulated. In case of no strategy, the graph displays no data.
Expenditure by Treatment Graph: Expenditure by Treatment graph displays the expenditure per Asset Group per Treatment Type for the strategy formulated. In case of no strategy, the graph displays no data.

Expenditure by Condition Graph: It displays the expenditure per Asset Group per Condition for the strategy formulated. In case of no strategy, the graph displays no data.

**Overall values**

Set of graphs for each Asset Group with Average Remaining Useful Life of the asset group and corresponding expenditure based on Treatment Strategy.

Average Remaining Useful Life: Takes the average of individual condition distribution and generates an overall condition of the Asset Group for each year based on the remaining useful life defined for each condition.

Average Condition Score: Takes the average of individual condition distribution and generates an overall condition of the Asset Group for each year based on the condition score defined for each condition.

Total Expenditure: Aggregates the expenditure for each year for the Asset Group.

Aggregate: Switching Aggregate ON will generate the aggregated view of all the Asset Groups within the Analysis. All the individual graphs and the overall value graphs are aggregated. For independent Model if Asset Groups are measured in different units then only Expenditure Graph is aggregated.

Compare: Allows two or more analysis sharing the same Model, Data and Base Year to be compared with each other for overall values.
Confirm Dashboard

Introduction
The Dashboard provides a graphical display of information from Confirm. That information is derived from Data Sources and transmitted to the Dashboard, using the Scheduled Reports functionality and the Task Processor, at user-defined intervals. The Dashboard is automatically refreshed at an interval specified in Dashboard User Settings.

The Dashboard has Fit In View option, which allows viewing all widgets without scrolling the page.

Switching
The active Dashboard can be changed by selecting a different Dashboard from the drop down list. All the Dashboards which the logged in user have access to, are displayed in the drop down list. Typing search criteria in the drop down will filter the Dashboards displayed in the list.

Changing the active Dashboard in web interface will also change it in Confirm Client.

Drill-Down
The information of the data being displayed on the Dashboard can be viewed by clicking on the Category Text, or on the chart. The underlying information is displayed in a tabular form, in a new tab of the web browser. The table can be sorted by clicking on the column title.

Further details about Jobs, Enquiries, and Defects can be viewed from the Drill-down screen by clicking on the required item, provided the corresponding database table (job, enquiry/central_enquiry, or defect) is configured as a Linked Table.

Search
All the records in the Drill-down can be searched by entering the criteria. Records having the exact phrase entered will be filtered and displayed in the table. Clearing the search criteria by clicking ‘x’ icon will display all records in the table.

Export
All the records in the Drill-down can be exported to a CSV file by clicking Export. A file will be downloaded to the browser’s default download location. File name will be same as widget name.
Confirm Customer Services

Intro
The Customer Services functionality on the web allows you to create, view, and edit an Enquiry.

Search Enquiry
You can search for an Enquiry to view/edit its details.

You can perform search in the search box. You need to enter one or more of the following search criteria: Enquiry number, Enquiry location, Enquiry description, Customer name, Customer reference, Customer email Address, Subject name, Service type, Site name, Feature Type, Town or External System reference number.

If you want to search using multiple criteria, include a <space> between the criteria.

If you want to search for an exact match, enter the search criteria in quotes <"">.

The list of enquiries matching the search criteria will be displayed below the search box. The list displays up to latest 100 edited/updated Enquiries that match the search criteria. The list includes Customer as well as Officer Enquiries.

An enquiry in the list has following information:

Color: Represents if the Enquiry is Outstanding (Amber) or not (Green).

Subject and Enquiry Type of Service.

Enquiry.

linked to the Enquiry.
View Enquiry

You can view the details of an Enquiry in the list by clicking it.

Any field with the icon can be displayed in a pop-up with a bigger text area, allowing you to view longer text without having to scroll within the field. Click on the icon to see the pop-up.

Map

The map displays the location of the current Enquiry, Features, Jobs, and Defects linked to the Enquiry.

The map will also display any nearby Enquiries, Jobs, and Defects. Nearby Enquiries will be shown in they have the same Subject as the current Enquiry. Nearby Jobs will be displayed if any activity was performed on them in the last 30 days or they are scheduled to start in next 30 days. Nearby Defects will be displayed if they are not superseded, and are not set to 'No Action Required'. To hide/show nearby Enquiries, Jobs, or Defects, click the layer control button on the map.

Clicking on any item on the map will display an info popup.

The info popup displays the following details for Enquiry: Enquiry number, status, description (or subject if description not available), location (or site if location not available), logged date. For Jobs, the info
Confirm web Interface

popup displays the Job number, Job Type, current status, target/actual completion date. For Defects, the info popup display the Defect number, Defect Type, and the Defect creation date.

If more than one entity is at same location, a cluster is displayed in that location, with the count of overlapping entities. If the cluster has Enquiry in it, its border will have the same colour as that of Enquiry.

**Map - Create Enquiry**

When creating an Enquiry, the Map allows an Enquiry to be located. Selecting a Site will focus the map on the location of Site and all eligible features near the location of Site will be displayed. The symbols of features will be displayed as defined in Web Map Settings screen.

If Subject and Site are selected, any nearby Enquires created or updated in last six months and with the same Subject as selected will be displayed as 📍.

If more than one entity is at same location, a cluster is displayed in that location, with the count of overlapping entities. The cluster border will have the same colour as that of nearby Enquiry.
Map - Locating an Enquiry

The Enquiry can be located using the map. Click the location of the Enquiry and select 'Locate Enquiry' from the popup.

Alternatively, the Enquiry can be linked to a Feature. Click the Feature's icon on the map and select 'Link Feature' from the popup.

Before saving the Enquiry, the Feature can be unlinked, the Enquiry relocated or the Enquiry linked to a different Feature. To unlink, click the Feature's icon on the map and select 'Unlink Feature' from the popup.
Map - Adding a Customer to an existing Enquiry

When creating an Enquiry, you can view the details of a nearby Enquiry by clicking it on the map. An info bubble is displayed with information of the nearby Enquiry: Enquiry number, status, description (or subject if description not available), location (or site if the location is not available), logged date and 'Add Customer' link.

You can add a Customer to this nearby Enquiry by clicking the 'Add Customer' link in the info bubble. You will be redirected to that Enquiry, with a Customer section added.

You can view more details of nearby Enquiry in a pop-up by clicking the Enquiry number in the info bubble. You can add a Customer to this nearby enquiry by clicking the 'Add Customer' button.

Documents

This panel displays the Documents attached to an Enquiry. Clicking on a Document link opens the full view of the attachment in a new pop-up window. The opened Document can be downloaded to browser's default download location or to a specific path by clicking on download button.

Add Document
When creating or editing an Enquiry, it is possible to add a Document to an Enquiry to record any additional information coming via attachments. Use the Browse button to browse to any accessible location.

![Add Document](Image)

**Delete Document**

When editing an Enquiry, it is possible to delete an existing Document from an Enquiry, through the Document review pop-up.

The actual Document will be deleted if Document Store is set to 'Folder'.

![Delete Document](Image)

**Deleting Customer details**

To delete a Customer’s details from an Enquiry, Edit the Enquiry and click on the ‘Make Anonymous’ button in the Customer section.

Clicking on ‘Make Anonymous’ button will clear all details of a customer or contact in an existing Enquiry. It will replace the customer surname or the contact name with the date the details were cleared and the user who cleared them.
Customer: Mr. Jeff Williams (154)

Surname: Williams
Forename: Jeff
Title: Mr
Confirm Stock Management

The main page shows a list of all Stock Locations (Confirm Features) to which the user has Contract Area access. The search bar can be used to filter the list on location or inventory details.

Selecting a Location shows the Inventory of Materials at the chosen Location, including quantities.

The details of existing Stock Inventories can be edited by clicking the pencil icon in the list. This does not allow for the current quantity to be updated.
Stock Take

A Stock Take can be initialised by clicking the 'Start Stock Take' button. Once a Stock Take has been initialized then Inventory can be added to the Location by using the + button.

This also allows the current quantity of Inventories to be updated by clicking the pencil icon in the list. Once the Stock Take is completed then you can click the 'Stop Stock Take' to highlight that the batch of updates is finished.
Administration

Configure the Confirm Stock Management User Security  
(This is applicable for Confirm Stock Management only)
The user access can be set in the Confirm Client under user security. There is an entry for Confirm Stock Management.

<table>
<thead>
<tr>
<th>Feature Group</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works Management</td>
<td>☑️ ☑️ ☑️</td>
</tr>
<tr>
<td>Confirm Workzone®</td>
<td>☑️ ☑️ ☑️</td>
</tr>
<tr>
<td>Confirm Stock Management</td>
<td>☑️ ☑️ ☑️</td>
</tr>
<tr>
<td>Confirm Stock Management User Access (Security)</td>
<td>☑️ ☑️ ☑️</td>
</tr>
<tr>
<td>Confirm Stock Management Admin Access (Security)</td>
<td>☑️ ☑️ ☑️</td>
</tr>
<tr>
<td>Performance Monitoring</td>
<td>☑️ ☑️ ☑️</td>
</tr>
<tr>
<td>Payment Processing</td>
<td>☑️ ☑️ ☑️</td>
</tr>
</tbody>
</table>

- Confirm Stock Management Admin Access (security). Enables access to the Stock Management Settings form.

- In Confirm web interface, sign in as an Admin user and launch the Web Settings > Stock Management Settings form. Set the Location Feature Group to the required Feature Group.
- Locations (Features) appear in the list of Locations if the following is met:
  - Users Work Group has Contract Area access to the required Features.
Confirm Web Settings

Web Map Symbol Settings

Gives the ability to set custom symbols for Features displayed in the What's Going on Here functionality in ConfirmConnect®. This allows the user to set a symbol and background colour of the icon. The foreground or symbol colour will be automatically set to provide the best contrast for the chosen background colour.

Note: A default symbol has been pre-selected for all Feature Types, should there be a need to reset to this default symbol, filter for location_flag-diagonal-33 in the Nucleo Mini font and the default colour is hex number #ff66ff.

Search

Text based filter for the Feature Type list.

Fonts

Select from a list of available font types.

Search Symbols

Text based filter for the grid of symbols available for the selected Font.

For Example: Entering the text 'tree' will limit the symbols to those containing 'tree' in their name.

Note: Hovering the cursor over a symbol will display a tooltip containing its name.
Colour Picker
Select the desired colour. The text field beneath the colour picker allows the entry of a hex number should a specific colour be required.

Preview:
Displays the chosen Symbol for the currently selected Feature Type.

Web Map Layer Settings

This page provides the ability to configure background map layers for Confirm Customer Services, ConfirmConnect® and ConfirmWorkzone® which can be used to replace the default Bing maps, along with the preview of the map layer.

The map preview displays Bing layer, if the extents of the custom layer cannot be determined, with an option to switch to custom and aerial views (if available).

Note: The page removes the need to request SQL from Pitney Bowes to apply these settings. It will ensure that the entered text is within the database limit of 4000 characters and will use simple parsing to validate JSON text.

This will apply to all users of ConfirmConnect® who do not currently have a settings.js file loaded on their device.

Projections

ConfirmConnect®, ConfirmWorkzone®, and Confirm web are capable to transform all data coming from Confirm into your specified coordinate system, so that it can be displayed properly on the map. The popular visualisation system (EPSG:3785) used by Google and Bing is included as a standard. But for other coordinate systems, the definition needs to be provided, which is required for all map service types.

The definition for a coordinate system should be provided on Web Map Settings as follows:
"projection": This is the EPSG code of the coordinate system that you want to use. E.g. "EPSG:27700" is the EPSG code for British National Grid.

"projectionDef": ConfirmConnect® uses the Proj4 format for coordinate system definitions. You can find the Proj4 definition for your coordinate system here: http://spatialreference.org/. For example, http://spatialreference.org/ref/epsg/27700/proj4/ gives:
+proj=tmerc +lat_0=49 +lon_0=-2 +k=0.9996012717 +x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36 +units=m +no_defs

Note: Enter this on a single line in the projectionDef parameter.

Grid Shift
Some countries apply a grid shift in order to provide high accuracy coordinate conversions from default GPS coordinate systems into their own native coordinate systems. For example, in the UK the Ordnance Survey base maps use the OSTN02 grid. See the section entitled The National Grid transformation OSTN02 on the Ordnance Survey website for details.

In order for ConfirmConnect®, ConfirmWorkzone®, and Confirm web to accurately plot entities on map where this type of conversion is required, Pitney Bowes needs to be notified of the grid used so the grid shift file can be included. These files have not all been included by default due to their initial size and potential performance implications.

The OSTN02 grid shift file has been included with ConfirmConnect®, ConfirmWorkzone®, and Confirm web, if you use OS background maps, you will need to include an additional projectionDef value. Append '+nadgrids=ostn02' onto the end of the current line. For example:
+proj=tmerc +lat_0=49 +lon_0=-2 +k=0.9996012717 +x_0=400000 +y_0=-100000 +ellps=airy +datum=OSGB36 +units=m +no_defs +nadgrids=ostn02

GDA2020
Confirm supports the new GDA2020 coordinate reference system.
A GDA94 projection can be converted to a GDA2020 projection by adding another projectionDef value which is "+towgs84=-0.06155,0.01087,0.04019,-0.0394924,-0.0327221,-0.03289790,0.009994".

For example:
The projection definition for MGA zone 55 from spatialreference.org is:
"+proj=utm +zone=55 +south +ellps=GRS80 +towgs84=0,0,0,0,0,0 +units=m +no_defs"

Which can be converted to GDA2020 as follows:
"+proj=utm +zone=55 +south +ellps=GRS80 +towgs84=-0.06155,0.01087,0.04019,-0.0394924,-0.0327221,-0.03289790,0.009994 +units=m +no_defs"

Note: Enter this in a single line in the projectionDef parameter.

Full Text Search Settings
Confirm web interface supports full text search for customer address. This enables faster search of customer address in the web interface.
Before enabling the full text search, Confirm Database need to be configured

**Configuring SQL Server for enabling full text search**

The instructions mentioned [here](#) must be followed, to enable full text index feature in SQL server.

**Note:** Ensure the windows service ‘SQL Full-text Filter Daemon Launcher’ is running and its startup type is set to Automatic.

**Configuring Oracle Server for enabling full text search**

The instructions mentioned [here](#) must be followed, to enable full text index feature in Oracle database.

In Oracle, for every schema user (that needs to use full text search) in the asset_type table, following things are needed:

1. The database user needs to be given the role of CTXAPP (to allow them to create/manage full text preferences/indexes.
2. Execute permissions need to be given for the oracle text packages CTXSYS.CTX_CLS, CTXSYS.CTX_DDL, CTXSYS.CTX_DOC, CTXSYS.CTX_OUTPUT, CTXSYS.CTX_QUERY, CTXSYS.CTX_REPORT, CTXSYS.CTX_THES, CTXSYS.CTX_ULEXER.

Once the database configuration has been done, the ‘Address’ checkbox needs to be selected to enable full text search on customer address in the web interface. This will add the Full Text Index agent in the Scheduled Tasks. The Full Text index agent creates and maintains the full text index on customer address.

After the index has been created, full text search functionality will be used in the web interface for searching customer address.

If the ‘Address’ checkbox is deselected, the full text search is disabled and the corresponding index will be deleted.

**Stock Management Settings**

Stock Management settings form is used to set which Confirm Feature Group will be used for Stock Management. This allows any Features, of a Feature Type within this group, to be available as locations.
Confirm CentralEnquiries API

Confirm CentralEnquiries API allows uploading documents for an enquiry in Confirm. It can accept multiple documents in a Base64 encoded format. You have to first generate an OAuth token and then make your first API call. Refer the sections below to make your first API call.

Generating an OAuth token

Follow the steps to generate an OAuth token:

1. Obtain your API Key (Username) and Secret (password) from Confirm system administrator
2. To generate the OAuth Token, encode your credentials (API Key and Secret) using base64 computation mechanism. To do this, provide API KEY and Secret to the base64 encoder (online encoder can be used), and generate the encoded ‘base64value’.
3. The following format should be used while computing the {BASE64VALUE}:
   {API KEY}:{SECRET}
4. Enter the generated ‘base64value’ in the header of the request and call the token URI as shown below:

   Authorization: Basic {base64Value}
   Content-Type: application/x-www-form-urlencoded
   POST {Confirm web url}/api/{tenant}/oauth/token
   grant_type=client_credentials

   Here, {tenant} is the tenant name and {Confirm web url} is the URL where Confirm web is deployed, like https://ConfirmWebServer/ConfirmWeb/.
5. The access token is returned as follows:

   ```
   {"access_token": "{your access token as a Base64 encoded value}"},
   "token_type": "bearer",
   "expires_in": {The expiry time in seconds}
   }
   ```

Response:

The response of the token API follows a standard response pattern as described under API Response on page 48.

CentralEnquiries POST Request

The POST request allows you to upload multiple documents for an enquiry in Confirm. It accepts and enquiry number and an array of documents.

To make an API call, you need to pass the OAuth access token in the request header (Making an API call).
Post Request Parameters:

<table>
<thead>
<tr>
<th>Name</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>enquiryNumber</td>
<td>integer</td>
<td>Required. The enquiry number.</td>
</tr>
</tbody>
</table>

Sample Request:

Authorization: Bearer {YOUR OAUTH ACCESS TOKEN}
Content-Type: application/json
POST {Confirm web url}/api/{tenant}/centralEnquiries

```json
{
    "enquiryNumber": "{Enquiry number}",
    "centralDocLinks": [
        {
            "documentName": "test.png",
            "blobData": "{Base64 encoded content}"
        },
        {
            "documentName": "test2.jpeg",
            "blobData": "{Base64 encoded content}"  
        }
    ]
}
```

Response:

The response of the API follows a standard response pattern as described under API Response on page 48

Confirm API Models

**error**

<table>
<thead>
<tr>
<th>Name</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>error_description</td>
<td>String</td>
<td>The error message explaining the reason why a document could not be uploaded.</td>
</tr>
</tbody>
</table>

**centralDocLink**

<table>
<thead>
<tr>
<th>Name</th>
<th>Data Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>documentName</td>
<td>String</td>
<td>Required. The name of the document.</td>
</tr>
<tr>
<td>blobData</td>
<td>String</td>
<td>Required. The Base64 encoded string representing the document content.</td>
</tr>
<tr>
<td>Name</td>
<td>Data Type</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>documentDate</td>
<td>String</td>
<td><strong>Optional.</strong> The date when the document is uploaded. When omitted, current date and time is used.</td>
</tr>
</tbody>
</table>

**API Response**

An API returns a status 200 (OK) when successful. In some cases, specific error(s) can be returned in the response even though the overall API status code is 200 (for example, for each document that fails to upload for an enquiry, an error object is returned with the reason of failure, but the API as a whole returns a status code 200).

**Errors:**
The following table describes the possible errors that can be returned by an API

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>400</td>
<td>Invalid request parameters.</td>
</tr>
<tr>
<td>401</td>
<td>Authentication failures, invalid licenses or expired access tokens.</td>
</tr>
<tr>
<td>403</td>
<td>Insufficient permissions.</td>
</tr>
<tr>
<td>404</td>
<td>No entity found within Confirm with the supplied key.</td>
</tr>
<tr>
<td>500</td>
<td>Any other error.</td>
</tr>
</tbody>
</table>
Frequently Asked Questions

• **Does ConfirmWeb Use Cookies?**
  Yes, some features of the ConfirmWeb need cookies to be enabled. We recommend enabling cookies on the browser for this application.

• **I use Internet Explorer 11.0 to connect to ConfirmWeb. The application does not reflect the changes that I make to the page.**
  Internet Explorer 11.0 maintains an old version of the rendered data as Temporary file. Though this feature improves the application performance but causes the browser to retain the old data. To prevent this caching of data, Internet Explorer should be configured as directed

  1. Open Internet Options from Tools menu
  2. Go to General Tab and click Settings button under the Browsing History section

  3. On Website Data settings dialog, go to Temporary Internet Files tab. For *Check for newer versions of stored pages* select the first option that is *Every time I visit the webpage.*
4. Close the dialog and refresh the page. The changes would start appearing correctly.

- **I am not able to see contextual help.**

  Sometimes you may not be able to see contextual help in Firefox or Chrome. Try one of the following:

  1. Refresh your browser (Press [Ctrl+R] or F5).
  2. If Refresh does not work, clear cache in your browser and try again.