

Core Release Bulletin

CostGuard Solution 17.3 SP1 Release

Nov 2017

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About this Document

IDI's Core Release Bulletins describe new *Core* functionality introduced with the release through either Adaptive (AR) or Feature (FR) requests. Core functionality is defined as a capability that is available to all customers that upgrade to the release, although in some cases additional custom work may be required to leverage it. This document includes an overview of the new capabilities as well as the required configuration or setup information. Supporting documentation can be found on E-Support under [Online Help](#).

Additional training opportunities are also available through IDI University. Please contact your Account/Project Manager for more information.

1 Release Summary

The following change orders are of interest to both CostGuard users (IDI customers) and IDI associates.

Functional Area	AR/FR	Description
Audit Log – New Web Application	AR 7776	<ul style="list-style-type: none"> • New Audit Log web application - lets authorized users search for and view audit log entries.
Customer Care	FR 2782	<ul style="list-style-type: none"> • CostGuard Dashboard Homepage – With Customer care 17.3 SP1 and higher, a new Dashboard replaces the original home page. It provides a list of the Tickets, Follow-Ups and Workflow tasks assigned to the user that is logged in.
	FR 2785	<ul style="list-style-type: none"> • Warning on setting a feature to Not Billing when the feature has not been final billed – Users are presented with a warning message that requires confirmation when attempting to set a feature to <i>Not Billing</i> and the feature has not yet been final-billed. • Service Type Indicator on Usage and Usage Balance page drop down menus – Indicating Service Type in the drop-down menus on these pages facilitates Service selection when active services having different Service Types have the same service number. • Default Follow-up Assign To current user – When adding a Follow-Up either from the Follow-Ups tab in the customer InfoCenter, or on the Follow-ups page, <i>Assigned To</i> defaults to the current user.
	AR 7776	<ul style="list-style-type: none"> • Ability to View Audit Logs directly in Customer Care.
	AR 7805	<ul style="list-style-type: none"> • Improved Payment Notifications - Workflow trigger enhancements support improved notifications in Customer Care for certain E-Pay transactions.
CostGuard Client	AR 7800	<ul style="list-style-type: none"> • Require CVV & Zip for Card Not Present Transactions – By requiring CVV and Zip Code on credit card <i>card not present transactions</i>, carriers can benefit from lower bank fees for such transactions.
OnlineBill	AR 7882 AR 7936	<ul style="list-style-type: none"> • Italian Localization - The OnlineBill user interface is presented in Italian using an updated Localization file. Note: Existing customizations will not be translated through the localization file. They must be translated manually and then re-entered through OnlineBill configuration. • French Canadian Localization - The OnlineBill user interface is presented in French-Canadian using an updated Localization file that replaces the prior file (AR 7743). Note: Existing customizations will not be translated through the localization file. They must be translated manually and then re-entered through OnlineBill configuration.

The following information is intended for IDI associates and may be ignored by IDI customers.

AR/FR	Description
FR 2776	<ul style="list-style-type: none"> • Maintenance Mode– This lets IDI developers disable jobs and troubleshoot issues, while in maintenance mode, without the Provisioning Restart Monitor automatically enabling those jobs. For details refer to the associated Solution Description.



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2 Audit Log Web Application

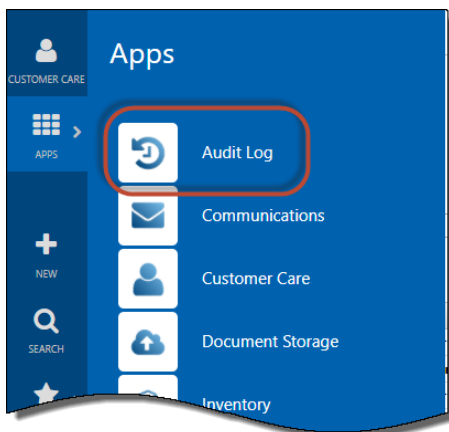
The Audit Log web application lets authorized users search for and view audit log entries.

2.1 PERMISSIONS

The Audit Log application is delivered with one role and one permission.

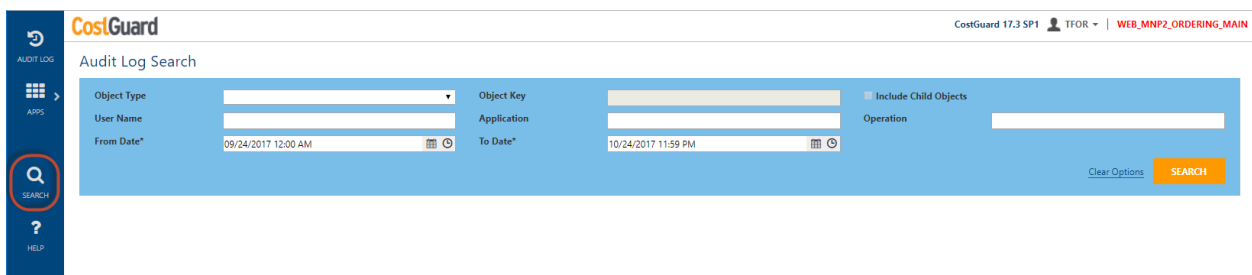
- Role: Audit Log User
- Permission: Allow Log On

Users with **Allow Log On** permission will have the Audit Log icon available to them in the Web Apps application tray.



2.2 SEARCHING

Searches are limited to a 30-day range in the Audit Log application. The date range defaults to the last 30 days; however, you can specify a different range within the 30-day limit as needed.



2.2.1 OPTIONAL SEARCH PARAMETERS

In addition to the date range, you may use the following search criteria as needed (not required):

- **Object Type:** You can select a specific object type - Customer, Feature, Order, or Service - or leave this field blank to search on all object types.
- **Object Key:** This field becomes editable when you select a specific object type. Object Key is:
 - Account Number when the Object Type = Customer
 - Service Number when the Object Type = Service
 - Order ID when the Object Type = Order
 - Feature ID (NonUsgSvcID) when the Object Type = Feature



The Object Key is not required. You may use it as needed to search for a specific customer, service, order or feature.

- **Include Child Objects:** This check box is only enabled when you select an Object Type of Customer, Feature or Service. This provides similar functionality to the Event Log Search in CostGuard Client when you uncheck the **Requires Exact Match** property on the search.
 - If checked when Object Type = Customer, the search returns audit log records for the customer, as well as the services, features, contacts and other related entries for the customer.
 - If checked when Object Type = Service, the search returns audit log records for the service, as well as the features on the service.
 - If checked when Object Type = Feature, the search returns audit log records for the feature, plus in the case of a package, the records for the items in the package.

Other than Object Type and Dates, the search criteria are not validated, meaning you can enter any value.



2.2.2 SEARCH RESULTS

Results are displayed in a grid. Options to view related entries and view audit log details for a specific entry are provided at the far right.

- Related Audit Logs: 
- Audit Log Details: 

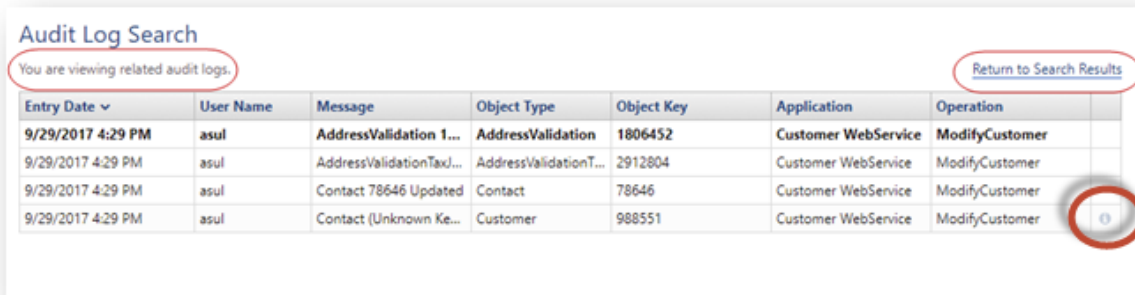
Audit Log Search

Object Type	<input type="text"/>	Object Key	<input type="text"/>	<input type="checkbox"/> Include Child Objects	
User Name	<input type="text"/>	Application	<input type="text"/>	Operation	<input type="text"/>
From Date*	09/24/2017 12:00 AM	To Date*	10/24/2017 11:59 PM	Clear Options <input type="button" value="SEARCH"/>	

Entry Date	User Name	Message	Object Type	Object Key	Application	Operation	
10/24/2017 3:14 PM	idi_asul	Session started for UserID: 809	SetConfigData		QACGAPPSVR01_CostGuardServer	QACGAPPSVR01_CostGuardServer	
10/24/2017 3:08 PM	idi_ssım	ScheduledJobHistory 11474883 Inserted	ScheduledJobHisto...	11474883	QACGAPPSVR01_ObjectEngine	QACGAPPSVR01_ObjectEngine	 
10/24/2017 3:05 PM	idi_asul	Session ID: 11086270 has been terminated	SetConfigData		QACGAPPSVR01_CostGuardServer	QACGAPPSVR01_CostGuardServer	
10/24/2017 3:03 PM	idi_asul	Session started for UserID: 809	SetConfigData		QACGAPPSVR01_CostGuardServer	QACGAPPSVR01_CostGuardServer	
10/24/2017 2:57 PM	idi_asul	Session started for UserID: 809	SetConfigData		QACGAPPSVR01_CostGuardServer	QACGAPPSVR01_CostGuardServer	
					QACGAPPSVR01_ObjectEngine	QACGAPPSVR01_ObjectEngine	

2.2.2.1 Related Entries

Clicking the Related Audit Log icon displays all entries for the **event tree** (all audit log records with the same value in the TreeNodeID field) of the record selected. The audit log for which you chose to display related entries is displayed in bold. You can return to the original search results by clicking the **Return to Search Results** link.

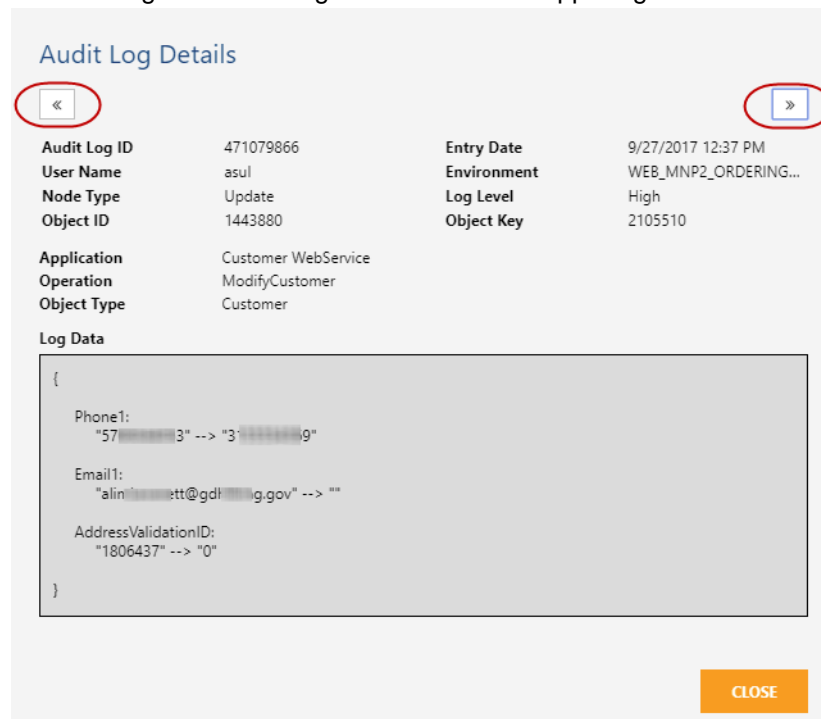


Audit Log Search
You are viewing related audit logs. [Return to Search Results](#)

Entry Date	User Name	Message	Object Type	Object Key	Application	Operation
9/29/2017 4:29 PM	asul	AddressValidation 1...	AddressValidation	1806452	Customer Webservice	ModifyCustomer
9/29/2017 4:29 PM	asul	AddressValidationTaxl...	AddressValidationT...	2912804	Customer Webservice	ModifyCustomer
9/29/2017 4:29 PM	asul	Contact 78646 Updated	Contact	78646	Customer Webservice	ModifyCustomer
9/29/2017 4:29 PM	asul	Contact (Unknown Ke...	Customer	988551	Customer Webservice	ModifyCustomer

2.2.2.2 Audit Log Details

Clicking the Audit Log Details icon displays the Audit Details dialog. From here you can scroll through entries using the arrows at the upper right and left of the dialog.



Audit Log Details

« »

Audit Log ID	471079866	Entry Date	9/27/2017 12:37 PM
User Name	asul	Environment	WEB_MNP2_ORDERING...
Node Type	Update	Log Level	High
Object ID	1443880	Object Key	2105510

Application Customer Webservice
Operation ModifyCustomer
Object Type Customer

Log Data

```
{
  "Phone1": "57[REDACTED]3" --> "3[REDACTED]9"
  "Email1": "alin[REDACTED]tt@gdl[REDACTED]g.gov" --> ""
  "AddressValidationID": "1806437" --> "0"
}
```

CLOSE

2.2.3 AUDIT LOG MANAGEMENT WEB SERVICE

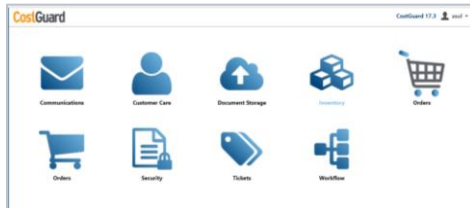
An AuditLogManagement RESTful web service is available. Documentation for the new AuditLogManagement web service is provided under Developer Tools > Web API Documentation in the IDI Knowledge Center.

3 Customer Care Web Module

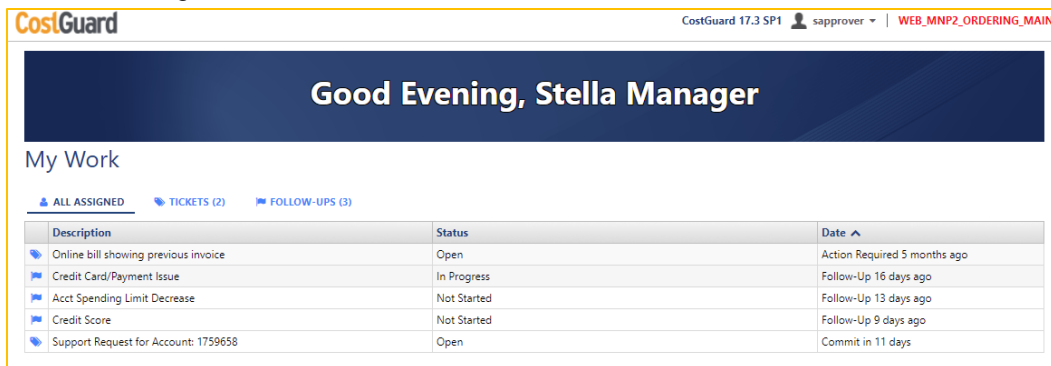
3.1 NEW DASHBOARD

With Customer Care version 17.3 SP1 and higher, a new Dashboard page replaces the home page in previous releases of CostGuard.

Old Home Page:

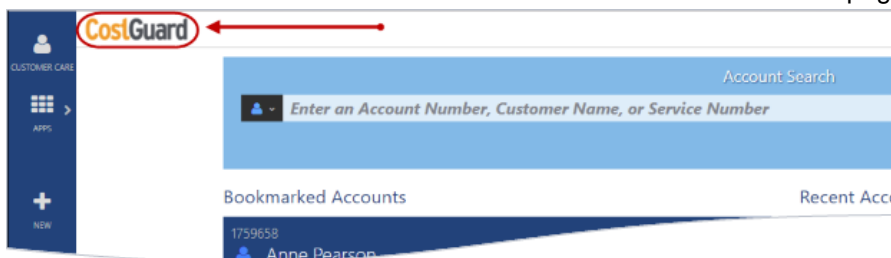


New Home Page:



Description	Status	Date
Online bill showing previous invoice	Open	Action Required 5 months ago
Credit Card/Payment Issue	In Progress	Follow-Up 16 days ago
Acct Spending Limit Decrease	Not Started	Follow-Up 13 days ago
Credit Score	Not Started	Follow-Up 9 days ago
Support Request for Account: 1759658	Open	Commit in 11 days

Access to the Dashboard is via the CostGuard link available on all web pages.






The new dashboard provides a list of the Tickets, Follow-Ups and Workflow tasks assigned to the user that is logged in. The information is available either on a summary tab (All Assigned), or on a separate tab by work item type.

All Assigned Tab

This tab contains a list of all tickets, follow-ups and workflow tasks assigned to the user in order by date, with the oldest item first.

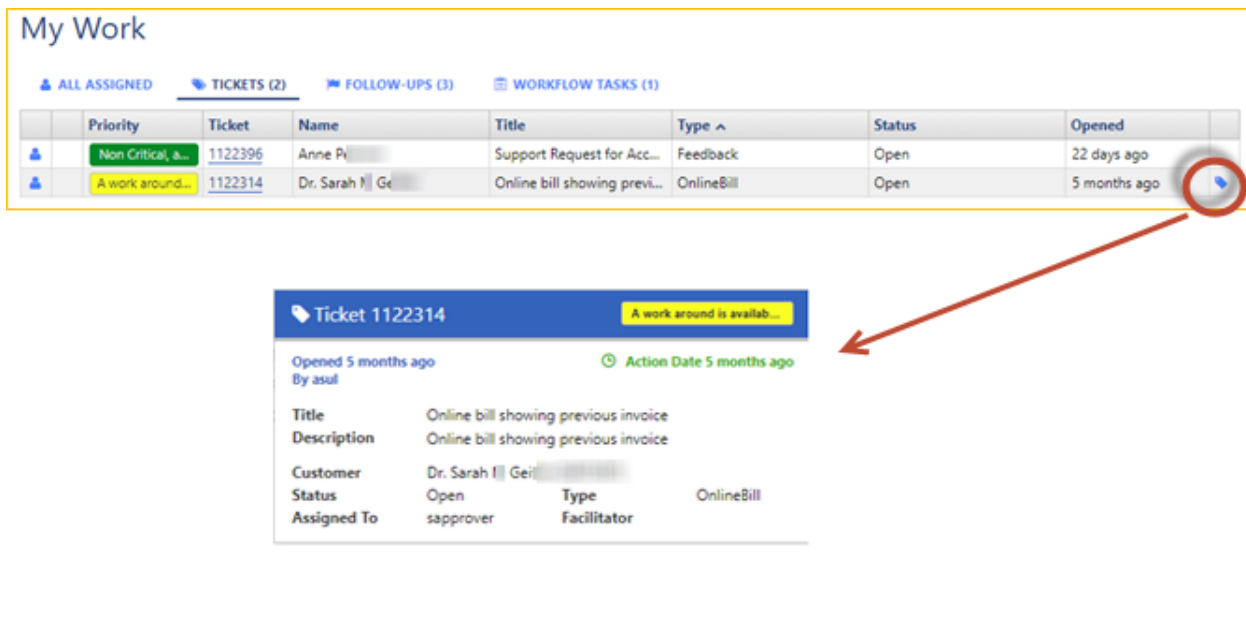
The icon in the left-most column indicates the type of work item:

-  - Ticket
-  - Follow-up
-  - Workflow task

You can click on the row to open the work item in a new tab. Note that the grid headers cannot be clicked for sorting.

Tickets Tab

The tickets tab provides a list of tickets assigned to the user. The grid provides additional details for each ticket, sort capability (on all columns except 'Name'), and a preview option:



The screenshot shows the 'My Work' interface with a table of assigned tickets. The table has columns for Priority, Ticket, Name, Title, Type, Status, and Opened. Two tickets are listed: one with priority 'Non Critical, a...' and ticket number 1122396, and another with priority 'A work around...' and ticket number 1122314. A red circle highlights the ticket icon in the second row, with an arrow pointing to a detailed view of that ticket.

Priority	Ticket	Name	Title	Type	Status	Opened
Non Critical, a...	1122396	Anne Pi...	Support Request for Acc...	Feedback	Open	22 days ago
A work around...	1122314	Dr. Sarah I Ge...	Online bill showing previ...	OnlineBill	Open	5 months ago

Ticket 1122314 A work around is availab...

Opened 5 months ago 🕒 Action Date 5 months ago
By asul

Title Online bill showing previous invoice
Description Online bill showing previous invoice
Customer Dr. Sarah I | Gei...
Status Open **Type** OnlineBill
Assigned To sapprover **Facilitator**


Clicking on the Ticket number opens the ticket in a new tab.

Follow-ups Tab

The follow-ups tab provides a list of follow-ups assigned to the user.

My Work

[ALL ASSIGNED](#)
[TICKETS \(2\)](#)
[FOLLOW-UPS \(2\)](#)
[WORKFLOW TASKS \(1\)](#)

Follow-Up	Type	Follow-Up Date ^	Status	Account Number	Customer Name	Created By	Create Date
 1122385	Acct Spending Limit ...	16 days ago	Not Started	424	Deborah Fi	asul	24 days ago
1122406	Credit Score	in 2 days	In Progress	1756	Anne Pe	asul	21 days ago

- An icon will be present in the left-most column if the follow-up is overdue.
- Clicking on the Follow-up number opens the follow-up in a new tab.

Workflow Tasks Tab

The Workflow tasks tab provides a list of workflow tasks that are assigned to the user that are in in-progress, in error, or on hold.

My Work

[ALL ASSIGNED](#)
[TICKETS \(2\)](#)
[FOLLOW-UPS \(2\)](#)
[WORKFLOW TASKS \(1\)](#)

Due Date ^	Task Name	Step Name	Workflow Name	Status	Group	Start Date
in 2 days	Approve Adjustment	Manual Approval of Adjust...	Approve Adjustment 29518...	In Progress	Adjustment Appro...	35 minutes ago

Clicking on the task name opens the workflow task in a new tab.

3.2 PAYMENT NOTIFICATIONS

Workflow trigger enhancements support improved notifications in Customer Care for certain E-Pay transactions.

- The existing Payment Created trigger now provides the E-Pay transaction ID.
- A new trigger **Payment Provider Transaction Error** is invoked on certain E-Pay transaction failures.

Note: One Time E-Pay transactions made in CostGuard client, where the user selects **Process immediately** will not invoke the Payment Created or Payment Provider Transaction Error triggers.

3.2.1 PAYMENT CREATED TRIGGER

This trigger has a new field **PaymentAccountTransactionID**. This is the unique identifier of the E-Pay transaction (when the payment is an E-Pay transaction). The Payment Created trigger is invoked for payments created by the following:

- E-Pay scheduled job
- Payment Import background process
- Import CostGuard Payment (Batch Files)
- ChargeAccount operation in Balance webservice

3.2.2 PAYMENT PROVIDER TRANSACTION ERROR TRIGGER

This new trigger captures E-Pay transaction errors. It contains the following information:

- Amount
- AccountNumber
- CustomerName
- CustomerID
- DeclinedAVSCode
- DeclinedReasonCode
- ErrorCode
- ErrorString
- EpayAccountID
- EpayTransactionID
- ProcessDate
- ProviderTransactionID
- TransactionSource
- TransactionStatus
- TransactionType

The Payment Provider Transaction Error trigger is invoked for:

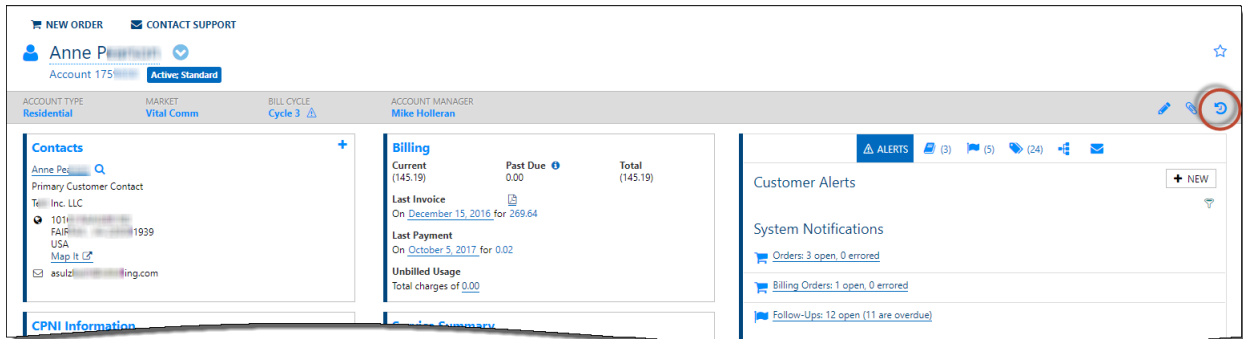
- a failed call to the payment gateway from the ChargeAccount operation in Balance webservice.
- each failed transaction (expired and other declines) when the E-Pay scheduled job runs.

3.3 AUDIT LOG IN CUSTOMER CARE

In Customer Care, you can display audit log entries for a customer (Customer Summary page), service or feature (Services and Features page or Service Details page). No special permissions are needed for viewing Audit Logs in Customer Care. Entries are pre-filtered for the object being viewed.

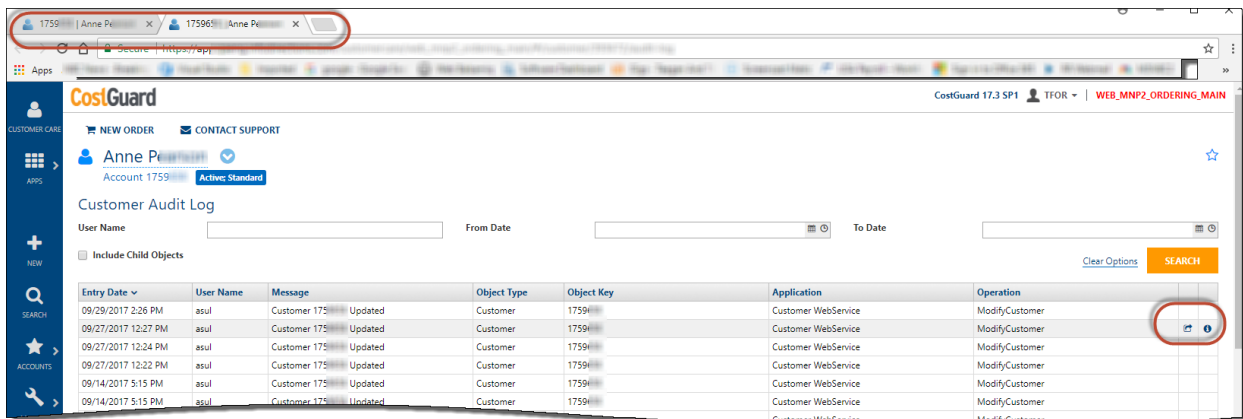
There is no date range limit; all entries will be returned.



To view the Audit Log, click the associated icon.



The audit log entries are opened in a new tab; however, you will still be in the Customer Care module.

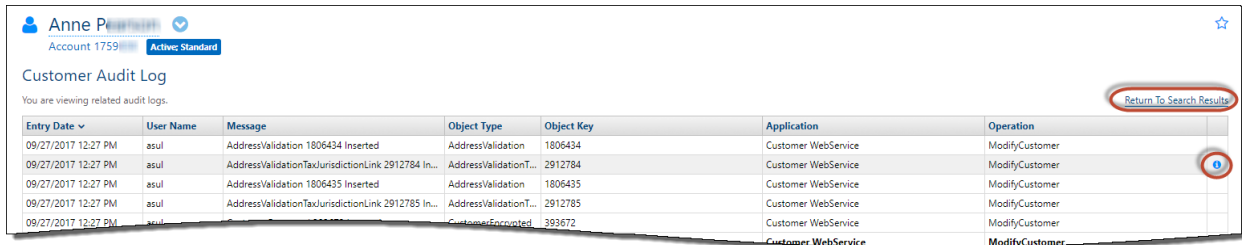
The audit log entries for child object will not be displayed by default; however, you have the option to include them. Search/filter parameters are available to refine the results. Options to view related entries and view audit log details for a specific entry are provided at the far right.



- Related Audit Logs: 
- Audit Log Details: 

3.3.1 RELATED ENTRIES

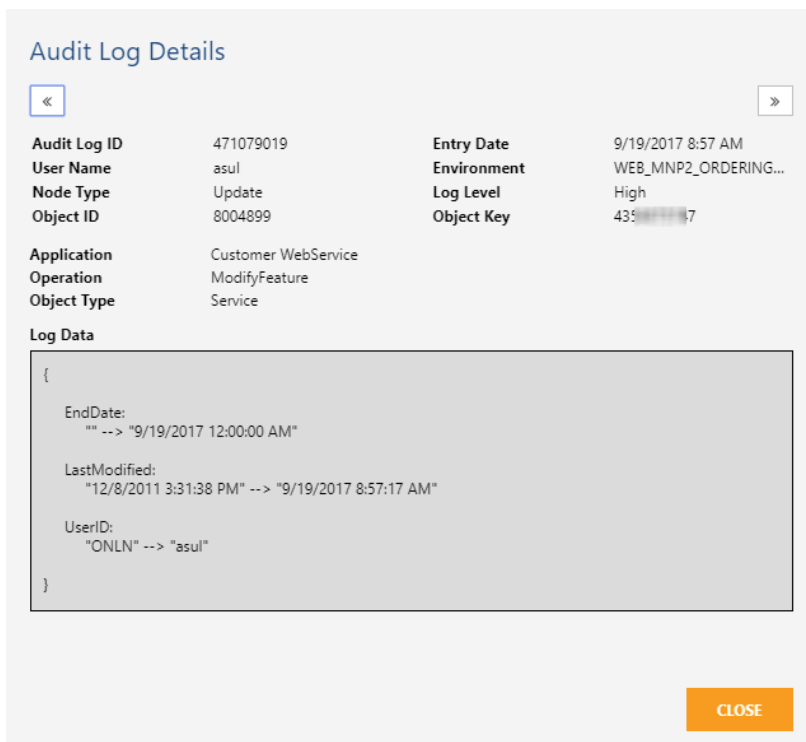
Viewing the related audit log entries will display all entries for the **event tree** (all audit log records with the same value in the TreeNodeID field) of the record selected. The audit log for which you chose to display related entries is displayed in bold. You can return to the original search results by clicking the **Return to Search Results** link or view details by clicking the details icon at the far right.



Entry Date	User Name	Message	Object Type	Object Key	Application	Operation
09/27/2017 12:27 PM	asul	AddressValidation 1806434 Inserted	AddressValidation	1806434	Customer Webservice	ModifyCustomer
09/27/2017 12:27 PM	asul	AddressValidationTaxJurisdictionLink 2912784 In...	AddressValidationT...	2912784	Customer Webservice	ModifyCustomer
09/27/2017 12:27 PM	asul	AddressValidation 1806435 Inserted	AddressValidation	1806435	Customer Webservice	ModifyCustomer
09/27/2017 12:27 PM	asul	AddressValidationTaxJurisdictionLink 2912785 In...	AddressValidationT...	2912785	Customer Webservice	ModifyCustomer
09/27/2017 12:27 PM	asul	CustomerEncrypted	CustomerEncrypted	393672	Customer Webservice	ModifyCustomer
09/27/2017 12:27 PM	asul	CustomerEncrypted	CustomerEncrypted	393672	Customer Webservice	ModifyCustomer

3.3.2 AUDIT LOG DETAILS

Clicking the Audit Log Details icon displays the Audit Details dialog. From here you can scroll through entries using the arrows at the upper right and left of the dialog.



Audit Log Details

<<
>>

Audit Log ID	471079019	Entry Date	9/19/2017 8:57 AM
User Name	asul	Environment	WEB_MNP2_ORDERING...
Node Type	Update	Log Level	High
Object ID	8004899	Object Key	435-7
Application	Customer Webservice		
Operation	ModifyFeature		
Object Type	Service		

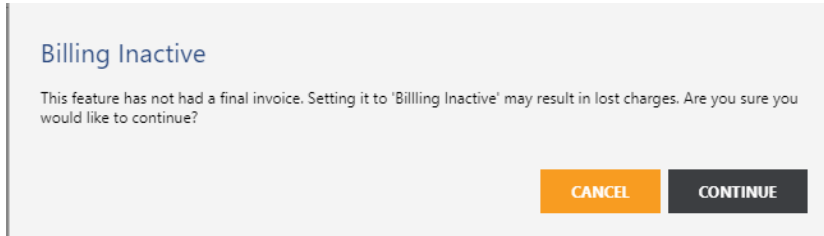
Log Data

```
{
  "EndDate": "9/19/2017 12:00:00 AM",
  "LastModified": "12/8/2011 3:31:38 PM",
  "UserID": "ONLN"
}
```

CLOSE

3.4 WARNING ON SETTING FEATURE'S BILLING STATUS TO *NOT BILLING* IF IT HAS NOT FINAL BILLED

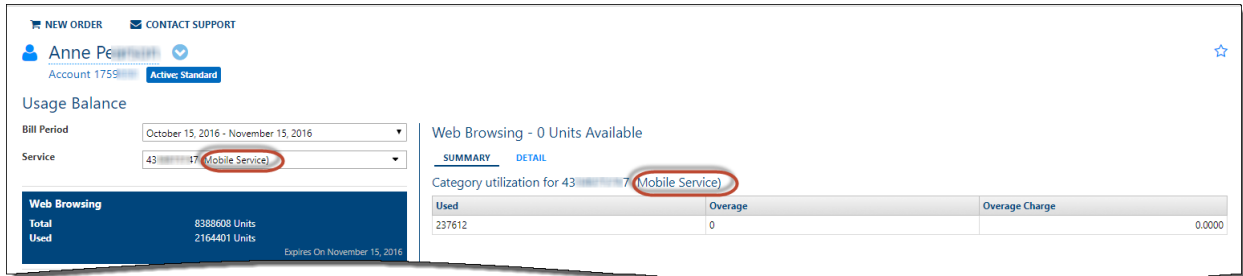
Customer Care displays a warning and requires confirmation prior to setting the Billing Status of a feature that has not yet been final-billed to **Not Billing**.



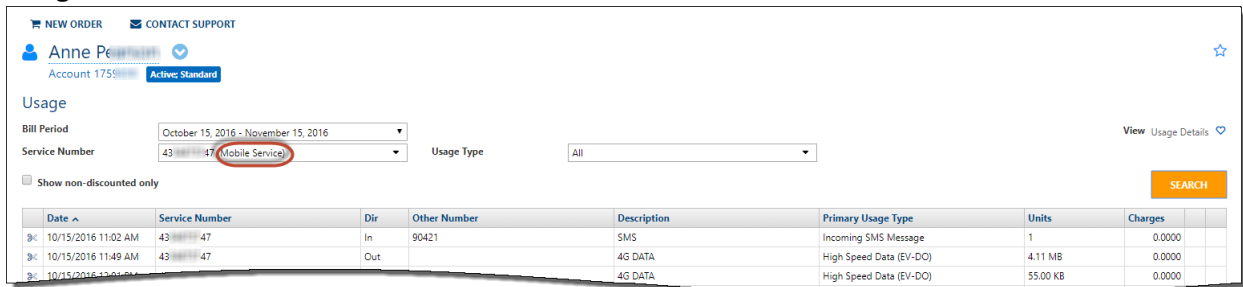
3.5 ADD SERVICE TYPE DESCRIPTION TO USAGE AND USAGE BALANCE PAGES

Indicating Service Type in the Service drop down menus on the Usage and Usage Balance pages facilitates selecting from active Services with the same Service Number and different Service Types.

Usage Balance:



Usage:



3.6 DEFAULT ASSIGNED TO TO THE CURRENT USER ON A NEW FOLLOW-UP

When adding a Follow-Up either from the Follow-Ups tab in the customer InfoCenter, or on the Follow-ups page, Assigned **To** defaults to the current user.

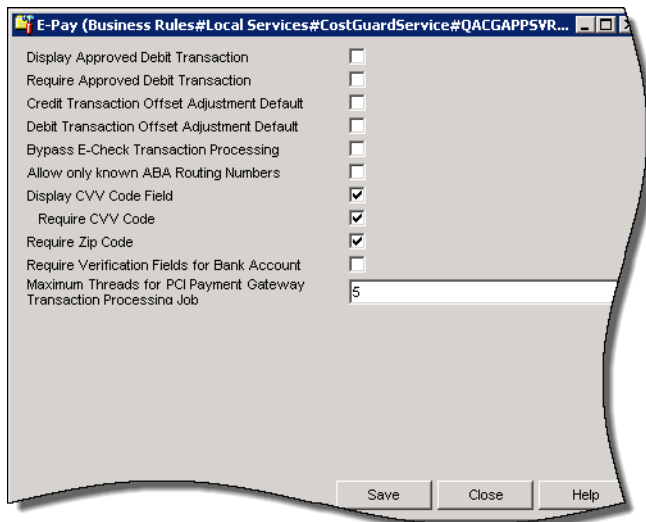
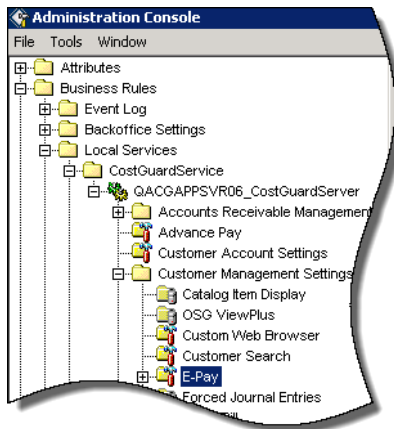
4 Require CVV & Zip for Card Not Present Transactions

By requiring CVV and Zip Code on credit card *card not present transactions*, carriers can benefit from lower bank fees for such transactions. This new functionality ensures all card-not-present transactions adhere to the existing *Require CVV* settings in Admin Console and register policy. It also adds and enforces a new setting for *Require Zip Code*. This includes OnlineBill enforcement of the new settings on creating a new account.

4.1 SETUP

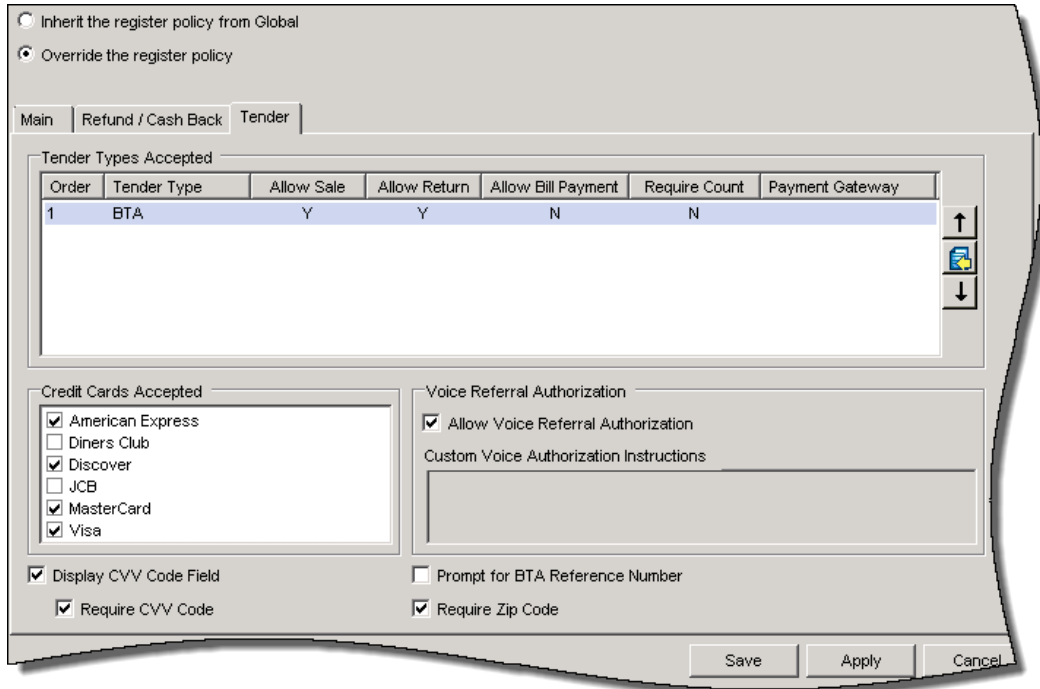
4.1.1 ADMIN CONSOLE – REQUIRE ZIP CODE

The **Require Zip Code** setting for E-Pay transactions is available via Admin Console Business Rules under Local Services > CostGuard Service > server > Customer Management Settings > Epay. Since this setting is not available to CostGuard users, carriers will need to submit a Service Request to have it set by IDI. The existing setting for **Require CVV** is in same location in Admin and can be confirmed/enabled via the same Service Request.



4.1.2 REGISTER POLICY – REQUIRE ZIP CODE

The Require Zip Code setting for POS transactions is available via the Register Policy form in CostGuard Client > POS > Backoffice. This setting must be enabled in any location that may complete a card not present transaction.



Order	Tender Type	Allow Sale	Allow Return	Allow Bill Payment	Require Count	Payment Gateway
1	BTA	Y	Y	N	N	

4.2 SUPPORT NEW SETTINGS

4.2.1 CG CLIENT

The Require Zip Code setting applies to both credit and bank E-Pay accounts. The Require CVV setting applies to credit accounts only. When the Require Zip Code setting is enabled, If you attempt to create an E-Pay account without a zip code you'll receive the following error: *A zip code is required for the E-Pay account.*

The following error is displayed when making one time charge/credit on accounts missing a zip code: *The selected E-Pay account does not have a zip code. Please edit the account to add the required zip code, then try again.* This error will prevent access to the charge/credit dialog.

4.2.2 POS

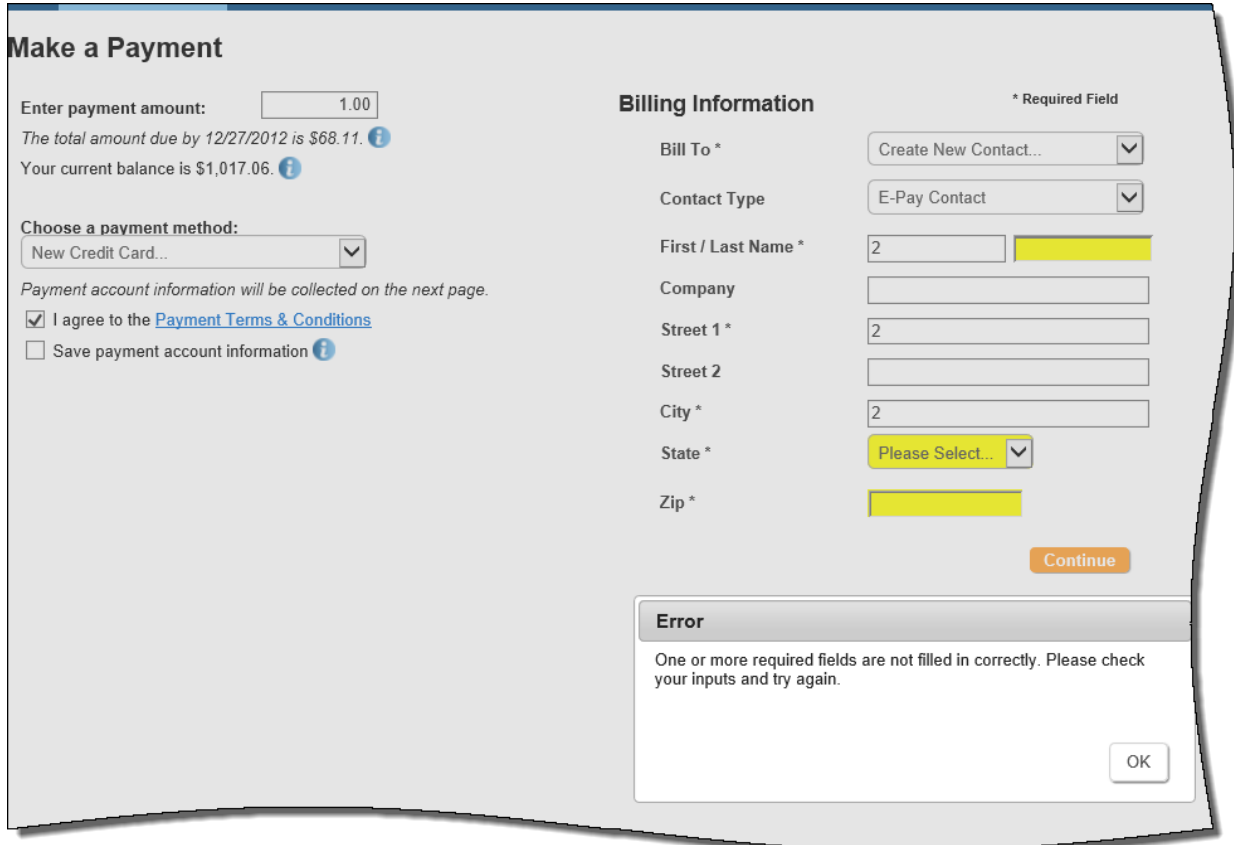
A onetime charge or selecting an E-Pay account will adhere to the Require CVV and Zip Code register policy setting. When these settings are enabled and the zip code is not filled in, the following error is displayed: *Zip Code is a required field.* This is similar to the existing functionality and error for the Require CVV setting.

In POS, when selecting an existing E-Pay account, entry of CVV is required per the existing CVV setting.

4.2.3 ONLINEBILL SUPPORT OF NEW SETTINGS

OnlineBill already required Zip Code as part of Make Payment; however, it did not require Zip Code for create E-Pay account. Zip Code is now required for the billing contact when it's set in register settings.

Note: Requirement of the CVV field is controlled via the payment gateway and may not adhere to the Require CVV setting.



Make a Payment

Enter payment amount:

The total amount due by 12/27/2012 is \$68.11. [i](#)

Your current balance is \$1,017.06. [i](#)

Choose a payment method:

Payment account information will be collected on the next page.

I agree to the [Payment Terms & Conditions](#)

Save payment account information [i](#)

Billing Information * Required Field

Bill To *

Contact Type

First / Last Name *

Company

Street 1 *

Street 2

City *

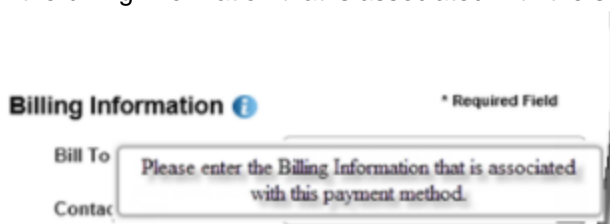
State *

Zip *

Error

One or more required fields are not filled in correctly. Please check your inputs and try again.

Also, an *Info* button has been added to the Billing Information section. The Info button will remind users to enter the billing information that is associated with the selected payment method.



Billing Information [i](#) * Required Field

Bill To

Contact

Please enter the Billing Information that is associated with this payment method.