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Core Release Bulletin

CostGuard Solution 20.7 Release

July 2020

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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 use 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 Resources > Knowledge Center and Resources Help Resources.

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

1 Release Summary

1.1 CHANGE ORDERS/ENHANCEMENTS

The following change orders and other enhancements are included in this release.

Functional Area	AR/FR	Description
Customer Care	FR 3257	**Automate Bill Cycle Changes Through Workflow** – The *Modify Customer Bill Cycle* action lets you automate changing a customer's Bill Cycle based on Bill Cycle Assignment rules configured in CostGuard Client. The action can be embedded in a workflow or be tied to a trigger (for example *Customer Modified*). **Note**: This feature was originally introduced in version 20.6. Version 20.7 provides these enhancements: • *Order Date* field renamed as *Date* • Return values now include New Bill Cycle ID as well as New Bill Period ID
Workflow	FR 3169	**Task Search includes Link Reference Type and ID** - Link Reference Type and Link Reference ID have been added as search parameters on the Task Search page. This is an enhancement to FR 3169 - *Enhanced bi-directional linkage between Workflows, Customer Care and Tickets* – delivered in CostGuard version 20.6.
	FR 3259	**Export task search results** – Users can export task search results to a csv file.
	FR 3260	**Export Trigger page** – Users can export Trigger page contents to a csv file.
Workflow Customer Care Tickets	FR 3232	**Data Lifecycle Management on Communications Messages** – The following functionality related to Data Lifecycle Management is available in Workflow and CostGuard 20.7 ahead of the full functionality which is targeted for Communications version 20.8: • New Workflow Actions - These actions are intended and set up specifically for Data Lifecycle Management and do not require any configuration by CostGuard users: ▪ *Archive Linked Workflow Messages* action archives Communications Messages associated to Workflows. ▪ *Archive Linked Customer Messages* action archives Communications Messages associated to Customer Accounts. ▪ *Archive Linked Ticket Messages* action archives Communications Messages associated to Tickets. • New informational text on Communications searches: ▪ Search on a Workflow instance when the completion date is older than the Communications retention period. Message bodies cannot be searched on archived messages. ▪ Search on Tickets when ticket closed date is older than the Communications retention period. Message bodies cannot be searched on archived messages. ▪ Search on Accounts when customer disconnected date is older than the Communications retention period. Message bodies cannot be searched on archived messages.
Provisioning Scripts	FR 3252	**Ability to edit provisioning script parameters on a scheduled job** - IDI has been adding the ability to create parameters on scheduled jobs to make values configurable, and no longer hard-coded in the scripts. While some jobs were updated to allow this, not all jobs had been updated. Under this feature all remaining scheduled jobs related to provisioning have now been updated. This means all credentials and other related information required to interface with the 3rd party network elements are now configurable, and can be modified without the need for an adaptive request.

1.2 RESOLVED KNOWN ISSUES

The following known issues have been resolved in this release.

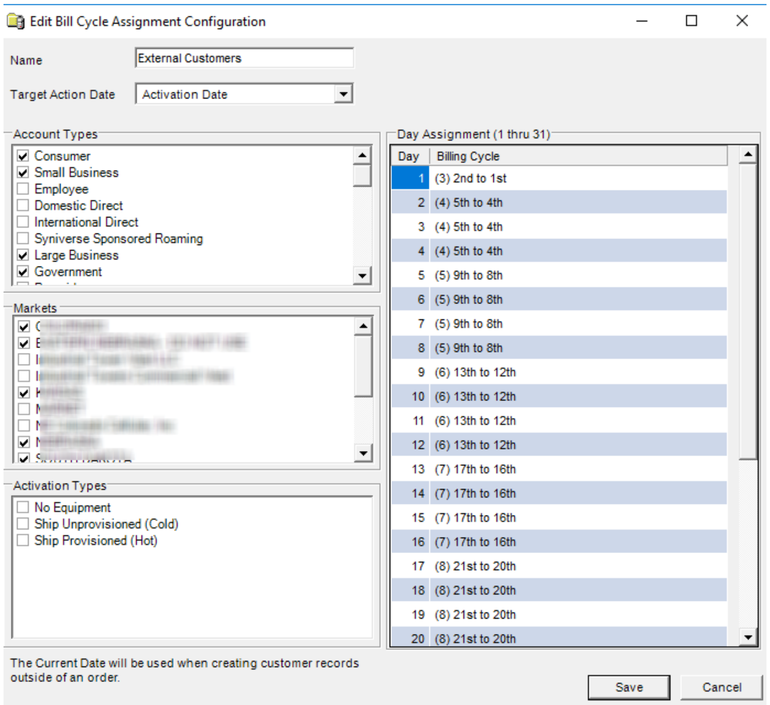
Functional Area	PR	Description
Customer Care	83469	When using the ETF (Early Termination Fee) Calculator in Customer Care, the calculation was not accounting for Grace Days. This functionality was updated to use ContractTerm GraceDays for calculating fees, so if a contract is within its grace days, there will be no early termination fee ($0).
OnlineBill	83485	On deployment of AR 8453 - *Enforce Credit Card Auto-pay functionality* - with CostGuard version 19.7, when attempting to make a payment in OnlineBill, under certain conditions the Submit Payment button was grayed out so that customers could not make a payment. The system was requiring the Auto-pay option to be checked on the selected payment account; however, the check box was not available if the account was already set to Auto-pay. To resolve this, the system now checks to see if there is an active debit/credit card set to Auto-pay: • If there is an active debit/credit card set to Auto-pay, the AutoPay setting is ignored and users can proceed. • If there is NOT an active debit/credit card set to Auto-pay, the system enforces the requirement to check the Auto-pay check box. This meets the requirements of AR 8453 and payments can be submitted.
	83488	The *remember me* check box on the Log-in page was allowing javascript to be injected into the page. This vulnerability has been closed.
Orders	83438	When using Direct Invoicing and the workflow has Billing System Update, Complete Order, and Force Complete Billing Order actions **in that order**, BTA adjustments were ending as *BLOCKED/UNPOSTED*. These adjustments should be posted as they are with Force Complete of Order Line Items in CostGuard Client. The Billing Order Management Web Service was updated so Force Complete functions the same as it does in CostGuard Client. Specifically it unblocks BTA adjustments. Steps to reproduce/test: • With Direct Invoicing enabled and configured AND with a workflow that contains the Billing System Update, Complete Order and Force Complete Billing Order actions (in that order), put through a new web order for a Direct Invoicing item. • Select BTA and submit the order. • After the workflow completes, review the customer account. Note that the billing order appears as complete, but when you look at the customer's Balances page in Care, the Unposted tab shows the new BTA adjustment as *BLOCKED*. • Modify the workflow definition to remove the Force Complete Billing Order action. • Put through another Direct Invoicing order as above. • After submitting the order (with BTA), go to the customer account in Care - on the Balances page, the BTA adjustment appears as *BLOCKED* and unposted, AND on the Orders page/Billing Orders, the order appears *IN PROCESS*. • Go to CostGuard Client, locate the in-process order, right click and select **Force Complete Order Line Items**. • Refresh the customer account in the client to see the order has completed. • Refresh the customer account in Care and go to the Balances tab - the previously blocked and unposted adjustment now appears on the Posted tab.
	83487	When calling an API using the Catalog Service Product Catalog Tree Odata, only the Root item was being returned instead of the complete package structure. This was updated to be able to correctly fetch a complete package structure when starting with the RootCatalogID.
	83519	When navigating the Orders web app, some actions were taking much longer than expected to load, or just time out entirely, particularly when viewing Order details. Changes were made to the *ORD.vw_ORDsvr_OrderActionSummary* view to improve performance and prevent timeouts.

Functional Area	PR	Description
Equipment Inventory	83484	In the Inventory web app, when using the Equipment Search drop down menus from both the main search screen and from the Assignment menu, the list of options only showed the top 100 items instead of the full list of available Equipment Types. This menu has been updated to include all records.
Payment Processing	83495	The *Auto-Create Recurring E-Pay Transactions* setting (introduced with AR 8514 in CostGuard version 20.4) was preventing transactions from being manually created when unchecked. This setting is supposed to only prevent the scheduled job from creating transactions, and not impact the manual process. The Accounts Receivable Management > Manage Recurring Transactions page in CostGuard Client has been updated so that transactions can be created for a bill period when the *Auto-Create Recurring E-Pay Transactions* option is disabled/unchecked.
	83515	AR 8514 (CostGuard version 20.4) negatively impacted the *Generate Recurring Transactions* operation in the Balance web service by not respecting E-Pay account end dates. As a result it would create transactions for E-Pay accounts with an end date of today or in the past This operation has been updated to only create E-Pay transactions for active recurring E-Pay accounts.
Retail Installment Plans	83457	When swapping equipment with an active Installment Plan (at least 1 installment billed) using the Installment Plan exchange wizard, and the total due is $0, the Tender Window is bypassed because no money is due or owed. In this case the General Ledger was recording an incorrect amount for the Future Installment amount (it included the amount already paid instead just the installment balance amount remaining). **Note**: While this impacted the GL, customers were not being incorrectly charged. This has been corrected by getting the CustomerID from the POSOrder instead of the POSTxn, so that the GetBilledThroughDate and CreateReturnInstallmentPlanTender are calculated correctly.
	83458	When a device was returned outside of the assigned Register Policy's return period but had Installments remaining, selecting **No Refund** (Return for Zero) resulted in an incorrect amount in the General Ledger (GL System Error). This was the result of tendering the installments already paid, when it should have been displaying the amount remaining to be paid. **Note**: While this impacted the GL, customers were not being incorrectly charged. This tender amount has been updated to get the tender amount from InstallmentAmountNotYetInvoiced as calculated by the view.
CostGuard Reports	83513	PR 83395 (CostGuard 20.3) was deployed to improve performance of the *Installment Plans by Account Report*. The solution worked for newer versions of SQL Server, but actually hurt performance for older SQL Server versions. PR 83513 adds indexes to improve efficiency, and the report is now back to it's previous performance level on any version of SQL Server.
Provisioning	83514	This is a Remote Scheduling Service startup prerequisite update. An extra 3rd party Microsoft reference library, required for the Remote Scheduling service startup process, was added to the installer payload.

2 Customer Care Enhancements

2.1 WORKFLOW ACTION TO AUTOMATE BILL CYCLE CHANGES

When you create a new customer in Customer Care, default Bill Cycle assignment is based on rules configured in CostGuard Client (Applications/BackOffice Management/RateBill/Bill Cycle Assignment Configuration). These rules determine the Bill Cycle based on Account Type, Market, Activation Type and Date (Current, Activation or Fulfilled).



Users in Customer Care can subsequently change the Bill Cycle manually on an existing customer as needed. When changing the Bill Cycle manually, the Destination Bill Cycle options are limited to a list of recommended Bill Cycles.

With this enhancement, a new *Modify Customer Bill Cycle* action lets you automate changing a customer's Bill Cycle based on the Bill Cycle Assignment rules configured in CostGuard Client. The action can be embedded in a workflow or be tied to a trigger (for example *Customer Modified*).

The logic detects conditions where the Bill Cycle cannot be changed:

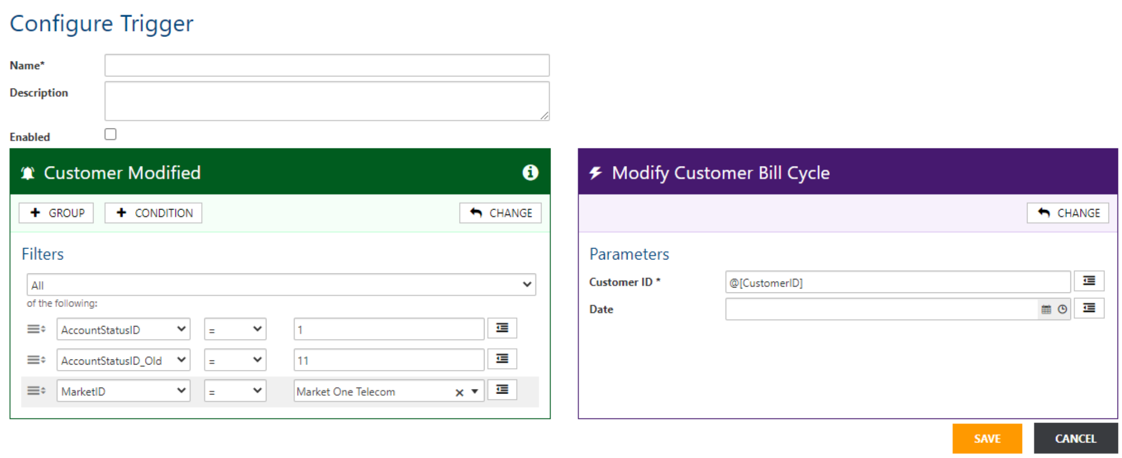
- There is a pending Bill Cycle change.
- The account is part of a corporate structure and cannot be moved to a separate Bill Cycle.
- No Bill Cycle Assignment configuration exists in the CostGuard Client.

In any of these cases, no Bill Cycle change is made.

In addition, the logic detects whether or not the Bill Cycle can be updated directly. The Bill Cycle can be updated directly if the account is a non-corporate account that has not yet been billed, and there is no usage in the current bill period. When a direct update is not appropriate, a Bill Cycle change request goes to pending status.

Using the Modify Workflow Action

An example application for the Modify Customer Bill Cycle action is shown below.

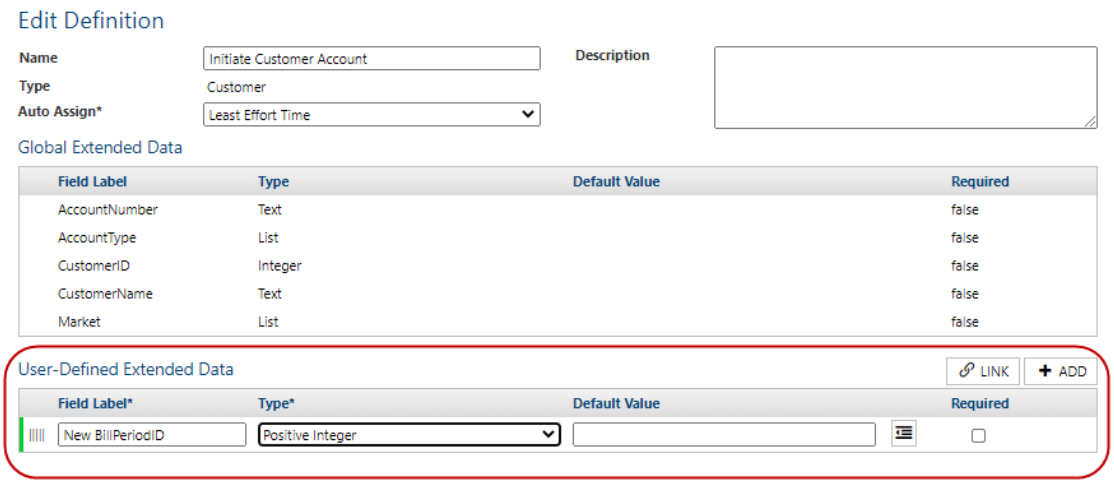


Action Parameters:

- Customer ID (required)
- Date (optional): if not supplied, the current date is used

Return Value:

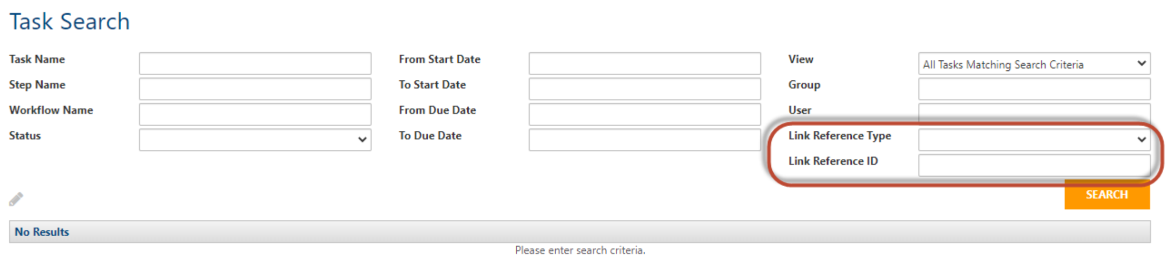
When the action successfully updates the customer's Bill Cycle, the action will return a value for the New BillPeriodID and New BillCycleID which can be accessed when using the action in a workflow. These values cannot be accessed when using the action in a trigger. To access the values for the new bill period and new bill cycle, User-defined extended data needs to be added to the workflow definition for *New BillPeriodID* and *New BillCycleID*.


Edit Definition
Name
Initiate Customer Account
Type
Customer
Auto Assign*
Least Effort Time
Description
Global Extended Data
Field Label
Type
Default Value
Required
AccountNumber
Text
false
AccountType
List
false
CustomerID
Integer
false
CustomerName
Text
false
Market
List
false
User-Defined Extended Data
LINK
ADD
Field Label*
Type*
Default Value
Required
New BillPeriodID
Positive Integer

3 Workflow

3.1 TASK SEARCH BY LINK REFERENCE IDS

Link Reference Type and Link Reference ID have been added as search parameters on the Task Search page.

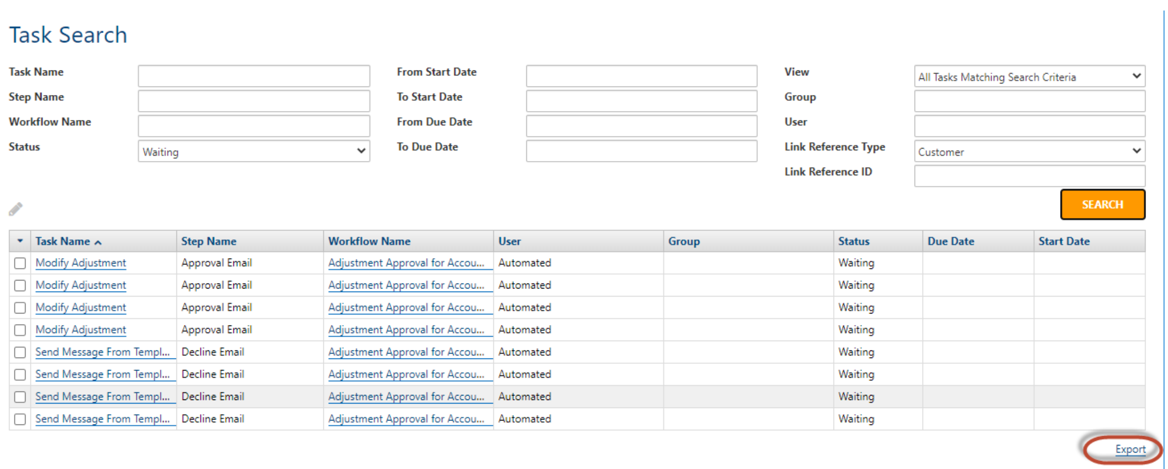


You can enter values in either or both of these fields to search by a specific linked object or type of object. The *Link Reference Type* dropdown provides two options: **Customer** and **Ticket**. This lets you search for workflow tasks linked to a specific ticket or customer when used in combination with the Link Reference ID. Or by selecting a type and leaving the link reference ID blank, all workflows associated to the selected link reference type will be returned.

Environments on a lower version of CostGuard will not display the new search parameters.

3.2 EXPORTING TASK SEARCH RESULTS

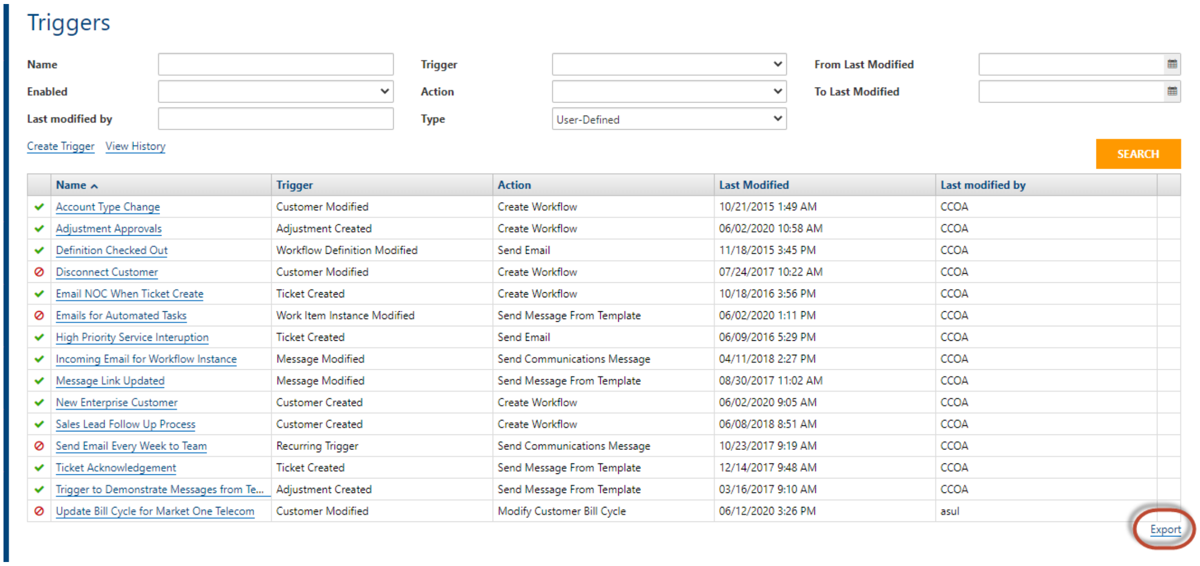
The **Export** option in the bottom right corner of the search results grid lets you export the Task search results to a csv file.



Clicking **Export** generates a csv file with all rows across all pages in the search results grid.

3.3 EXPORTING TRIGGER PAGE CONTENTS

The **Export** option in the bottom right corner of the Trigger grid lets you export the content of this grid to a csv file.



	Name	Trigger	Action	Last Modified	Last modified by
✔	Account Type Change	Customer Modified	Create Workflow	10/21/2015 1:49 AM	CCOA
✔	Adjustment Approvals	Adjustment Created	Create Workflow	06/02/2020 10:58 AM	CCOA
✔	Definition Checked Out	Workflow Definition Modified	Send Email	11/18/2015 3:45 PM	CCOA
⊘	Disconnect Customer	Customer Modified	Create Workflow	07/24/2017 10:22 AM	CCOA
✔	Email NOC When Ticket Create	Ticket Created	Create Workflow	10/18/2016 3:56 PM	CCOA
⊘	Emails for Automated Tasks	Work Item Instance Modified	Send Message From Template	06/02/2020 1:11 PM	CCOA
✔	High Priority Service Interuption	Ticket Created	Send Email	06/09/2016 5:29 PM	CCOA
✔	Incoming Email for Workflow Instance	Message Modified	Send Communications Message	04/11/2018 2:27 PM	CCOA
✔	Message Link Updated	Message Modified	Send Message From Template	08/30/2017 11:02 AM	CCOA
✔	New Enterprise Customer	Customer Created	Create Workflow	06/02/2020 9:05 AM	CCOA
✔	Sales Lead Follow Up Process	Customer Created	Create Workflow	06/08/2018 8:51 AM	CCOA
⊘	Send Email Every Week to Team	Recurring Trigger	Send Communications Message	10/23/2017 9:19 AM	CCOA
✔	Ticket Acknowledgement	Ticket Created	Send Message From Template	12/14/2017 9:48 AM	CCOA
✔	Trigger to Demonstrate Messages from Te...	Adjustment Created	Send Message From Template	03/16/2017 9:10 AM	CCOA
⊘	Update Bill Cycle for Market One Telecom	Customer Modified	Modify Customer Bill Cycle	06/12/2020 3:26 PM	asul

4 Editing Provisioning Script Parameters

Originally, all Provisioning scripts were created with certain parameters hard-coded directly into the script. This included things such as the provisioning web service url, CostGuard user names and passwords, credentials for integrating with the 3rd party provisioning network element, turning debug mode on or off, etc. Hardcoding these values added a degree of difficulty to the following:

- Customers could not directly modify any of these values, and required an adaptive request if any of these values changed.
- It was difficult to query for a list of the urls/IPs that CostGuard integrates with for provisioning since they were hard-coded in infoscript.

IDI has been adding the ability to create parameters on scheduled jobs to make values configurable, and no longer hard-coded in the scripts. While some jobs were updated to allow this, not all jobs had been updated. Now all remaining scheduled jobs related to provisioning have been updated. This means all credentials and other related information required to interface with the 3rd party network elements are now configurable, and can be modified without the need for an adaptive request.

This functionality is available in CostGuard Client via Job Scheduling Management:

- Under **Applications** > **Job Scheduling Management** select **Job Scheduling Services**.
- Right-click on **CG Provisioning Service** and select **View Jobs**.
- Right-click on the applicable job and select **Edit Job**.
- Click on the **Parameters** tab to display the configurable parameters.