Oracle® Communications
Network Charging and Control

Customer Care Portal User's Guide

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About This Document

Scope

The scope of this document includes all functionality a user must know in order to effectively operate the Oracle Communications Network Charging and Control (NCC) Customer Care Portal (CCP) application. It does not include a detailed design of the service.

Audience

This guide is written primarily for customer care operators. However, the overview sections of the document are useful to anyone requiring an introduction to this software.

Prerequisites

Although there are no prerequisites for using this guide, familiarity with the target platform would be an advantage.

This manual describes system tasks that should only be carried out by suitably trained operators.

Related Documents

The following documents are related to this document:

- *Charging Control Services User's Guide*
- *Charging Control Services Technical Guide*
- *Voucher Manager User's Guide*
- Subscriber Profile Manager User's Guide
- *Service Management System User's Guide*

Document Conventions

Typographical Conventions

The following terms and typographical conventions are used in the Oracle Communications Network Charging and Control (NCC) documentation.

Formatting Convention	Type of Information
Special Bold	Items you must select, such as names of tabs.
	Names of database tables and fields.
Italics	Name of a document, chapter, topic or other publication.
	Emphasis within text.
Button	The name of a button to click or a key to press.
	Example: To close the window, either click **Close**, or press **Esc**.
Key+Key	Key combinations for which the user must press and hold down one key and then press another.
	Example: **Ctrl+P** or **Alt+F4**.
`Monospace`	Examples of code or standard output.
`Monospace Bold`	Text that you must enter.
variable	Used to indicate variables or text that should be replaced with an actual value.
menu option > menu option >	Used to indicate the cascading menu option to be selected.
	Example: **Operator Functions > Report Functions**
[hypertext link]()	Used to indicate a hypertext link.

Specialized terms and acronyms are defined in the glossary at the end of this guide.

Customer Care Portal

Overview

Introduction

This chapter explains the basic features and purpose of the Oracle Communications Network Charging and Control Customer Care Portal.

In this chapter

This chapter contains the following topics.

What is the Customer Care Portal?

Introduction

The Customer Care Portal (CCP) is a customizable application that provides the information a user needs to manage their subscribers day to day. It is intended for use by customer services representatives (CSRs) who are performing tasks relating to subscriber account management rather than service configuration or operations.

Features

The CCP has these features:

- A single CCP Dashboard screen providing all the information a CSR needs to manage a subscriber, including the facility to:
  - Search for subscriber accounts and view the results
  - Edit subscriber details in the Edit Subscriber screen
  - Search for, change voucher status, and redeem vouchers
  - Search for and view EDR records
  - Execute common task
  - View an historical list of previously viewed subscribers and vouchers
- Optional warning and message of the day splash screens displayed when users log in.
- The CSR can lock the CCP Dashboard screen to preserve its contents while they away from their work station.

Java requirements

The CCP is a WebStart application that may be started using a shortcut to the locally stored WebStart file or by entering the CCP URL into a web browser.

This table describes the supported versions of the Java Runtime Environment and Internet browser required to run the CCP.

Software	Version	Description
JRE	1.5.0.6 or higher	Java Runtime Environment. **Important**: For JRE 1.7 only, you must update *all* **.jnlp** files in the **/IN/html/ccp** directory as follows: 1. Open a **.jnlp** file in a text editor. 2. Add "jnlp." to the beginning of all property names. For example: Change: `<property name="ORB_HOST" value="myhost"/>` to: `<property name="`**jnlp.**`ORB_HOST" value="myhost"/>` 3. Save and close the file.
Browser	Compatible with version of JRE being used	Required to display the application screens. Supported browsers on Windows XP are: • Microsoft Internet Explorer 6 SP1 • Microsoft Internet Explorer 7 SP2 • Mozilla Firefox 2.0

Getting Started

Overview

Introduction

This chapter explains how to log in to the Oracle Communications Network Charging and Control Customer Care Portal and how to use the main screen features.

In this chapter

This chapter contains the following topics.

Accessing CCP

Introduction

You can access the Customer Care Portal in any of the following ways, from:

- Your internet browser using the appropriate URL
- A Java WebStart URL
- The desktop or start menu using the CCP shortcut
- The Service Management System Services menu.

Notes:

- When from a Java WebStart URL, the Customer Care Portal is invoked using a jnlp file.

- The first time you access the CCP you must enter the CCP URL in your internet browser. If you have the required version of Java Runtime, then this will create the CCP shortcut automatically and load the CCP application. You will then be able to run the CCP whenever you want to, by clicking on its shortcut.

- If you want to access the CCP Dashboard and SMS at the same time then you must access the CCP from the SMS **Services** menu.

MSISDN parameter

Whenever possible, the CCP is invoked with a MSISDN parameter so that the CCP can be pre-populated with a subscriber's data.

When invoked through SMS screens or Java WebStart from another application, the current subscriber MSISDN is automatically appended to the URL.

Example:

```
http://sms/ccp/ccp.jnlp?3453464645
```

Service Management System default page

Here is an example Service Management System default page that is displayed for users navigating to the SMS on a web-server.
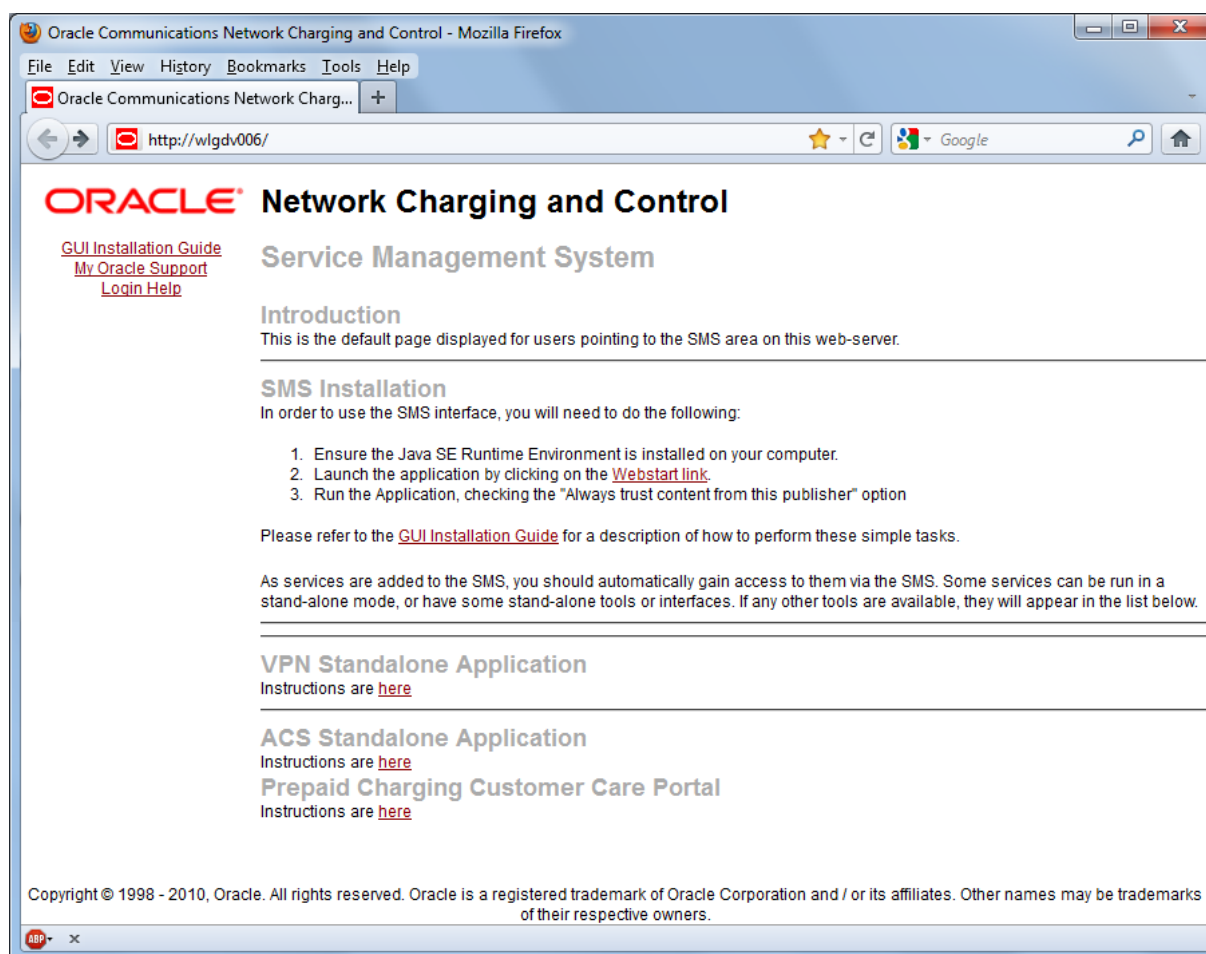
This page provides access to Prepaid Charging Customer Care Portal. Click the link on the here link to access the instructions. For more information, see *Logging in the first time* (on page 4) and *Logging in using CCP URL* (on page 11).

Logging in the first time

Follow these steps to log in to the CCP for the first time using the CCP URL.

Note: You can use this process to install a shortcut to the CCP on your desktop.

Step	Action
1	Open the Internet Browser you will be using to run the CCP. For example: Internet Explorer or Mozilla Firefox.
2	Enter the CCP URL. For example, if you are using the default URL then enter: "`http://SMS_hostname/ccp/index.html`". See your system administrator if you do not know the correct URL. **Result:** You see the Oracle Communications Network Charging and Control CCP Installation screen.
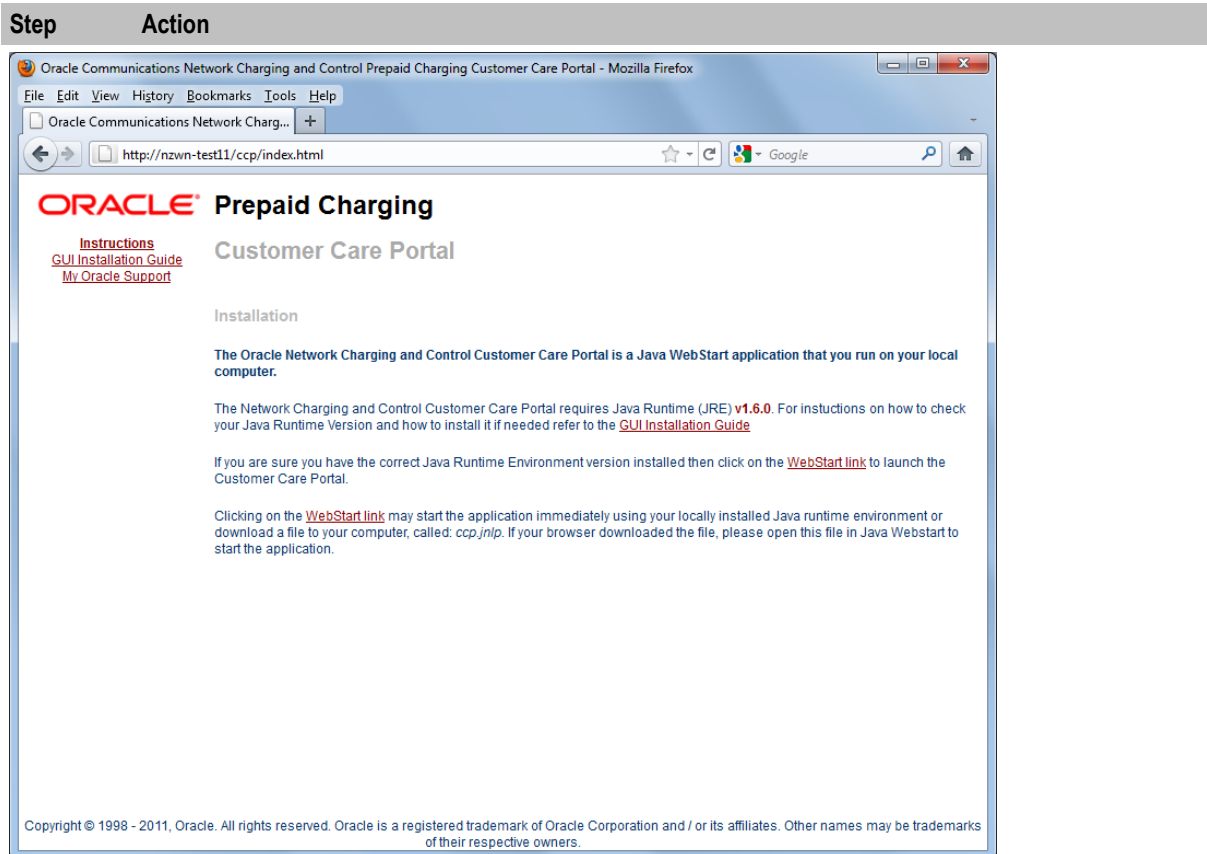
Step	Action

3   Click the WebStart link.

Note: To see this link you must have the required version of Java Runtime installed.

Result: You see the following screens:

1. Java Loading screen.

2. Java Starting application screen.
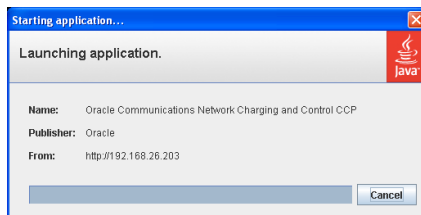
3. Prepaid Charging CCP - Create shortcut(s) screen.

Step	Action
4	In the Prepaid Charging CCP - Create shortcut(s) screen, click **Yes**.

Result: A shortcut to the CCP is created for the desktop and the start menu. You will be able to use the shortcut next time you want to access CCP.

You also see the CCP Login screen.

5	Enter your user name in the **User Name** field.
6	Enter your password in the **Password** field.

Warning: A maximum of three attempts to enter the correct user name and password combination is allowed.

7	Click **Login**.

Result: If enabled, you see the Security Warning such as in this example.
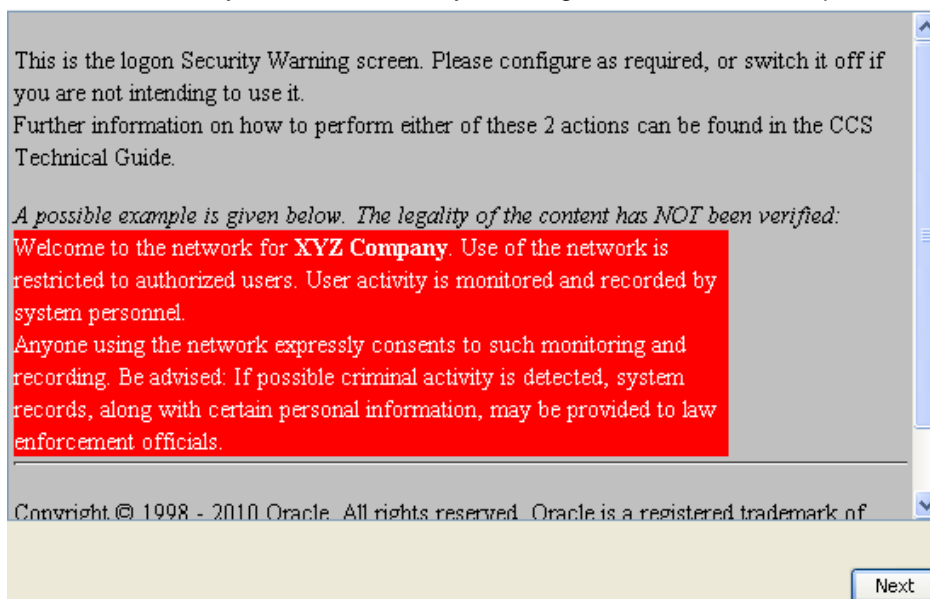
Step	Action
8	Click **Next**.

Result: If enabled you see the Message of the Day such as in this example.

This is the Message Of The Day screen. Please configure as required, or switch it off if you are not intending to use it.
Further information on how to perform either of these 2 actions can be found in the CCS Technical Guide.

A possible example is given below.

The system will be shut down at 18:00hrs GMT today for system intervention and a software upgrade.

Continue

Step	Action
9	Click **Continue**.

Result: You are logged into the CCP and you see the CCP Dashboard screen.

For more information about the CCP Dashboard screen, see *CCP Dashboard* (on page 17).

Logging in from a Java WebStart URL - first time

Follow these steps to log into the CCP for the first time using a Java WebStart URL.

Note: The WebStart URL can be a command line entry or a link from within another application.

Step	Action
1	Invoke the WebStart URL.

Note: Usually already set up as a link. If required to be entered from a command line, enter "`http://SMS_hostname/ccp/ccp.jnlp`"

Step	Action
2	You see the following screens:

1. Java Loading screen.

2. You also see the CCP Login screen.

Step	Action

3   Enter your user name in the **User Name** field.

4   Enter your password in the **Password** field.

> **Warning:** A maximum of three attempts to enter the correct user name and password combination is allowed.
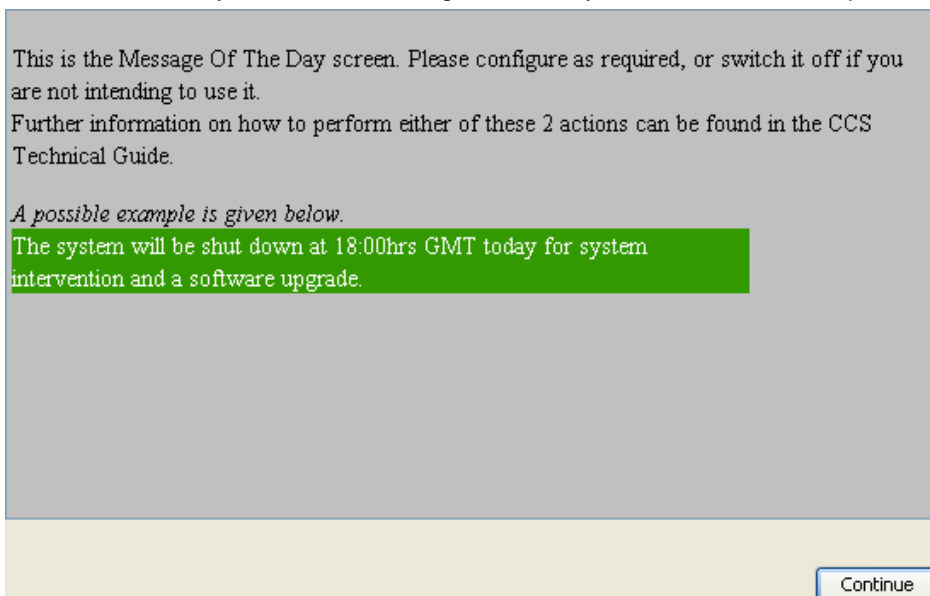
5   Click **Login**.

         Result: If enabled, you see the Security Warning such as in this example.

6   Click **Next**.

         Result: If enabled you see the Message of the Day such as in this example.

Step	Action

This is the Message Of The Day screen. Please configure as required, or switch it off if you are not intending to use it.
Further information on how to perform either of these 2 actions can be found in the CCS Technical Guide.

A possible example is given below.
The system will be shut down at 18:00hrs GMT today for system intervention and a software upgrade.

Continue

7	Click **Continue**.

Result: You are logged into the CCP Anchor screen and the CCP Dashboard screen opens.

For more information about the CCP Dashboard screen, see *CCP Dashboard* (on page 17).

Logging in using a shortcut

Follow these steps to log into the CCP using the shortcut on the start menu or desktop.

Step	Action
1	Perform either of the following actions: ● Double click the Oracle CCP shortcut icon on the desktop ● Select the Oracle Prepaid Charging CCP option from the Start menu. **Result:** You see the Customer Care Portal splash screen.

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Prepaid Charging Customer Care Portal

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Step	Action
	This is followed by the CCP Login screen.

2 Enter your user name in the **User Name** field.

3 Enter your password in the **Password** field.

> **Warning:** A maximum of three attempts to enter the correct user name and password combination is allowed.

4 Click **Login**.

Result: If enabled, you see the Security Warning such as in this example.

5 Click **Next**.

Result: If enabled you see the Message of the Day such as in this example.

Step	Action

6	Click **Continue**.
	Result: You are logged into the CCP Anchor screen and the CCP Dashboard screen opens.
	For more information about the CCP Dashboard screen, see *CCP Dashboard* (on page 17).

Logging in using CCP URL

Follow these steps to log in using the CCP URL when the CCP has already been installed on your work station.

Step	Action
1	Open the internet browser you are using to run the CCP. For example, Microsoft Internet Explorer, or Mozilla Firefox.
2	Enter the CCP URL. For example, if you are using the default URL then enter "`http://SMS_hostname/ccp/index.html`".
	See your system administrator if you do not know the correct URL.
	Result: You see the Oracle Network Charging and Control CCP Installation screen.
	Tip: Bookmark this page to access it directly.

Step	Action
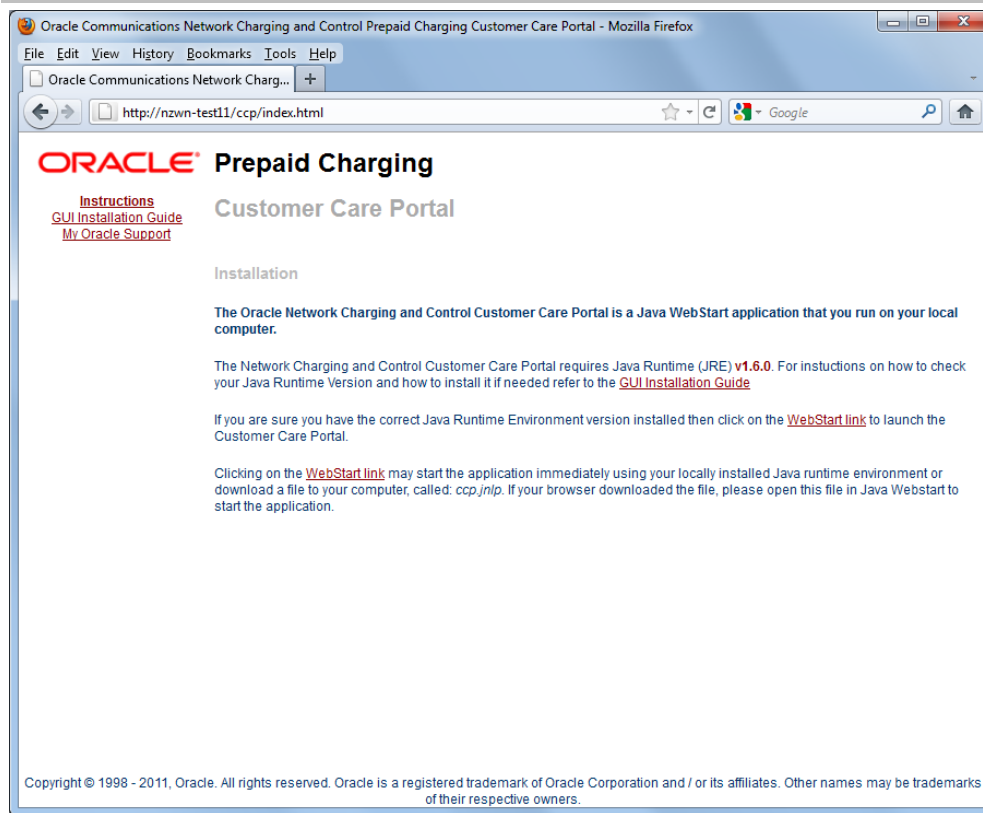
3   Click the WebStart link.

        Note: To see this link you must have the required version of Java Runtime installed.

4   **Result:** You see the CCP splash screen.

        You also see the CCP Login screen.

Step	Action

5	Enter your user name in the **User Name** field.
6	Enter your password in the **Password** field.

> **Warning:** A maximum of three attempts to enter the correct user name and password combination is allowed.

7	Click **Login**.

Result: If enabled, you see the Security Warning such as in this example.

8	Click **Next**.

Result: If enabled you see the Message of the Day such as in this example.

Step	Action

This is the Message Of The Day screen. Please configure as required, or switch it off if you are not intending to use it.
Further information on how to perform either of these 2 actions can be found in the CCS Technical Guide.

A possible example is given below.
The system will be shut down at 18:00hrs GMT today for system intervention and a software upgrade.

Continue

| 9 | Click **Continue**. |

Result: You are logged into the CCP Anchor screen and the CCP Dashboard screen opens.

CCP Anchor
Logged in as: SU
Log Out

For more information about the CCP Dashboard screen, see *CCP Dashboard* (on page 17).

Accessing CCP Dashboard from SMS

Follow these steps to open the CCP Dashboard screen from SMS.

Step	Action
1	Select the **Services** menu from the SMS main screen.

SU - Service Management System

File Services Operator Functions Help

ACS Service
CCP Dashboard
Promotion Manager
Prepaid Charging ▶
Voucher Manager
Messaging Manager ▶
Subscriber Profile Manager

Step	Action
	Note: The services which are available under the **Services** menu depend on the components which have been installed, and the permissions of the user. The services displayed in this screen shot may not match the services you have available on your system.
2	Select **CCP Dashboard**.
	Result: You see CCP Dashboard screen.
	Note: The CCP Anchor screen is not displayed from SMS.

Subsequent dashboard access

For non SMS access methods, the successful initial log in is associated with the CCP Anchor screen.

While this panel is open, there is no need to re-enter the user ID or password, so for all subsequent invocations, the dashboard is displayed as if coming from SMS.

The dashboard content is either an empty dashboard, or subscriber data for the MSISDN passed as the WebStart URL parameter.

Note: If no subscriber data can be found for the passed MSISDN, an error is displayed instead of the dashboard.

Closing the dashboard

For all methods, clicking the standard **X** icon will close the dashboard, returning to the previous application screen the dashboard was called from.

To completely close a non-SMS invoked dashboard, after closing the dashboard, perform one of the following actions:

- Click **Log Out** on the CCP Anchor screen
- Reboot the PC

This will force the next non SMS user invocation to enter their user details.

CCP Dashboard

Overview

Introduction

This chapter explains the features of Oracle Communications Network Charging and Control Customer Care Portal that are available from the CCP Dashboard.

In this chapter

This chapter contains the following topics.

CCP Dashboard Screen

Introduction

The CCP Dashboard screen displays information about your subscribers. It contains a number of features that help you to manage subscriber data quickly. You can:

- Search for subscriber accounts. For details, see *Searching for Subscribers* (on page 19).
- View a summary of a subscriber's details. For details, see *Quick View* (on page 21).
- Search for and change the status of vouchers or redeem vouchers. For details, see *Vouchers in CCP* (on page 61).
- View the subscriber's recent EDRs. For details, see *View EDRs from Dashboard* (see page 22).
- Complete common administrative tasks. For details, see *Common Tasks* (on page 23).
- Quickly find and select recently viewed subscribers or vouchers. For details, see *History* (on page 25).
- Open the Edit Subscriber screen. For more information about editing subscribers, see *Accessing the Edit Subscriber screen* (on page 19).

The CCP Dashboard screen also provides the following security features:

- Lock the dashboard. For details, see *Locking and Unlocking the Dashboard* (on page 27).
- Change your password. For details, see *Changing Your Password* (on page 26).
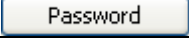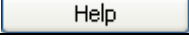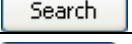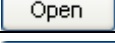
CCP Dashboard screen
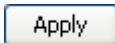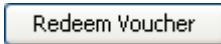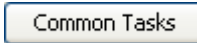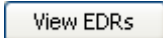
Here is an example CCP Dashboard screen at initial startup.

Access to elements of this screen are controlled by user permissions. If you cannot see some of the functionality described for this screen, your permissions may have been set to restrict access to that element.

Buttons

This table describes the buttons available in the CCP Dashboard screen.

Button	Function
Lock Dashboard	Hides the CCP Dashboard screen and opens the CCP Dashboard Locked screen. The user must enter their user name and password before the CCP Dashboard screen will be reopened. **Note:** This must be the same user and password combination as the one entered when the user initially logged in.
Password	Use to change your password.
Help	Opens the CCP help files.
Search	Use to search for subscriber or voucher records.
Open	Opens the Edit Subscriber screen for a selected subscriber.
Refresh	Refreshes the details in the screen.

Button	Function
Apply	Changes the voucher state.
Redeem Voucher	Redeems a voucher for a selected subscriber.
Vouchers	Toggles the Vouchers panel on or off.
Common Tasks	Toggles the Common Tasks panel on or off.
History	Toggles the History panel on or off.
View EDRs	Toggles the EDR panel on or off.

Status bar

In the bottom left corner of the CCP Dashboard there is a status bar. The status bar displays messages about the tasks being performed using the CCP Dashboard.

Status bar example

Here is an example the status bar reporting the results of a subscriber search.

Status: Search completed successfully

Accessing the Edit Subscriber screen

Follow these steps to open the Edit Subscriber screen for a selected subscriber.

Note: Only primary wallet information is available for editing when you open the Edit Subscriber screen from the CCP Dashboard.

Step	Action
1	In the CCP Dashboard screen, search for the subscriber to view or edit using the subscriber search fields. For details see *Finding a subscriber* (on page 20).
2	Highlight the row in the search results for the subscriber to edit.
3	Click **Open**. **Result:** You see the details of the subscriber selected from the search results in the Edit Subscriber screen. **Tip:** To quickly open the Edit Subscriber screen, double click the required entry in the search results.

Searching for Subscribers

Introduction

You can search for subscribers in the CCP Dashboard screen based on criteria entered in the subscriber search fields. The available search fields will depend on how your system has been set up. A maximum of four search fields may be available.

CCP Dashboard search panel

Here is an example **search panel** on the CCP Dashboard screen.

Finding a subscriber

Follow these steps to search for a subscriber in the CCP Dashboard screen.

Step	Action
1	From the drop down list, select the **Service Provider**.
2	In the search panel, enter the search strings you are using to find the required subscriber in one or more of the available search fields.
	If your search is based on any of these fields, you can enter just the first few characters to search for in the search field:
	• Subscriber ID
	• Card Number
	• Customer
	• Wallet Reference
	If you are searching on any other field, then you must enter the full value to search for in the search field.
3	Click **Search**.
	Result: Subscribers that match all the search criteria will be displayed in the search results.
	Note: You may only access wallet information for a subscriber's primary wallet in the CCP, therefore only primary wallet information will be returned.

Search results panel

Here is an example search results panel in the CCP Dashboard screen.

Note: The exact appearance of this screen will depend on how your system has been set up.

Search results

The results of a subscriber search are displayed in the search results table immediately below the subscriber search fields. Only the first 100 records matching your search criteria will be listed. If the subscriber you require does not appear in the list and more than 100 records were returned, then you will need to refine your search criteria. For example, enter longer search strings and/or specify more search fields.

Tip: To reorder subscribers by a particular column name, select the column in the search results table.

Finding linked subscribers

Follow these steps to find any additional subscribers that share their primary wallet with a selected subscriber.

Step	Action
1	In the search results panel select the subscriber for whom you want to find any linked subscribers.
2	In the search panel select the **Show Linked Subscribers** check box.
	Result: Any additional subscribers that share the primary wallet of the selected subscriber will appear in the search results list.

Quick View

Introduction

The Quick View panel in the CCP Dashboard screen lets you view important information about a selected subscriber account. The information which is available will depend on the configuration defined for the selected service provider.

Quick View panel

Here is an example Quick View panel from the CCP Dashboard screen.

Viewing a subscriber

Follow these steps to see a quick view of a selected subscriber.

Step	Action
1	In the search results panel on the CCP Dashboard, select the subscriber record to view.
	Result: The Subscriber's details appear in the Quick View panel.
	Tip: To display the details of a previously selected subscriber in the Quick View, select the subscriber ID from the History panel.
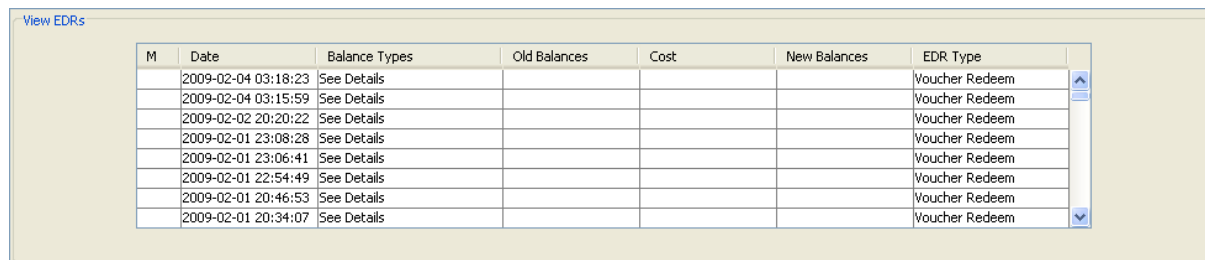
View EDRs from Dashboard

Introduction

The View EDRs panel in the CCP Dashboard screen lets you view the recent EDRs for a selected subscriber account. The information which is available will depend on the configuration defined for the selected service provider.

View EDR panel

Here is an example View EDRs panel from the CCP Dashboard screen.

Note: This is pre-populated with the EDRs for the subscriber selected from the search results panel, plus age and category values from the **jnlp** file. See *CCS Technical Guide*.

Viewing EDR list

Follow these steps to see the EDRs of a selected subscriber.

Step	Action
1	In the search results panel on the CCP Dashboard, select the subscriber record to view. **Result:** The subscriber's details appear in the Quick View panel, and the EDR details are listed in the View EDRs panel. **Tip:** To display the details of a previously selected subscriber in the Quick View, select the Subscriber ID from the History panel.
2	Click **View EDRs** if panel is not displayed. **Note:** The information which is available will depend on the configuration defined for the selected service provider. The default EDRs shown will depend on configuration in the **sms.html** or **ccp.jnlp** file.

View EDR detail

Follow these steps to view the details of an EDR record.

Step	Action
1	Select the EDR record to view in the table in the View EDRs panel.
2	Double click the EDR record. **Result:** You see the *EDR Details for Subscriber* (See example on page 23) screen. **Note:** The screen layout and available fields depend on the category and template definition configured for the EDR in CCS. For more information, refer to *CCS User's Guide*.
3	To change the currency used to display costs and balances, select the **Display Currency**

Step	Action
	drop down list.
4	When you have finished viewing that EDR record, click **Close**.
	Result: You return to the Dashboard.

Notes:

- From the Dashboard the EDR details can only be viewed, they cannot be reversed.

- To reverse a charge the EDR must be accessed through the Edit Subscriber process. See the *Reversing a charge* (see page 54) procedure.

EDR Details for Subscriber screen

Here is an example EDR Details for Subscriber screen.

Common Tasks

Introduction

The CCP Dashboard screen provides the facility to execute any common tasks that have been set up for you. You execute common tasks from the Common Tasks panel where a button is provided for each available task.

Note: Common Tasks may also be referred to as BPL tasks.

Common Tasks panel

Here is an example Common Tasks panel in the CCP Dashboard screen.

Common Tasks

Voucher Type Recharge
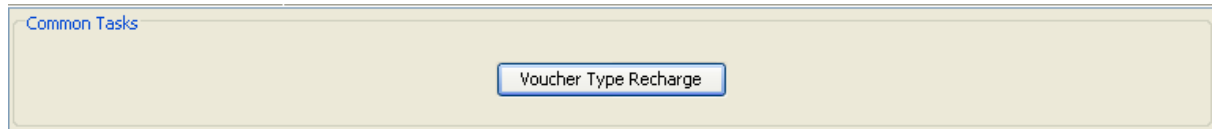
Executing a common task

Follow these steps to execute a common task for a subscriber.

Note: The common task will be executed for the subscriber currently displayed in the Quick View.

Step	Action
1	In the CCP Dashboard screen search for the subscriber. For details, see *Finding a subscriber* (on page 20).
2	Select the subscriber record in the search results so that their details appear in the Quick View.
	Tip: Select a subscriber from the History panel to redisplay their details in the Quick View.
3	If the Common Tasks panel is not currently visible in the CCP Dashboard screen, then click **Common Tasks** to display it.
	Note: If no common tasks have been defined for the service provider then the Common Tasks panel is not displayed. You see the following message in the Status bar at the bottom of the screen: `"No Common Tasks defined."`
4	In the Common Tasks panel, click the button for the task you want to execute.
	Result: You see the Confirm Execute Common Task prompt.

Confirm Execute Common Task for Subscriber 125

Do you really want to execute Common Task -
Voucher Type Recharge

Execute   Cancel
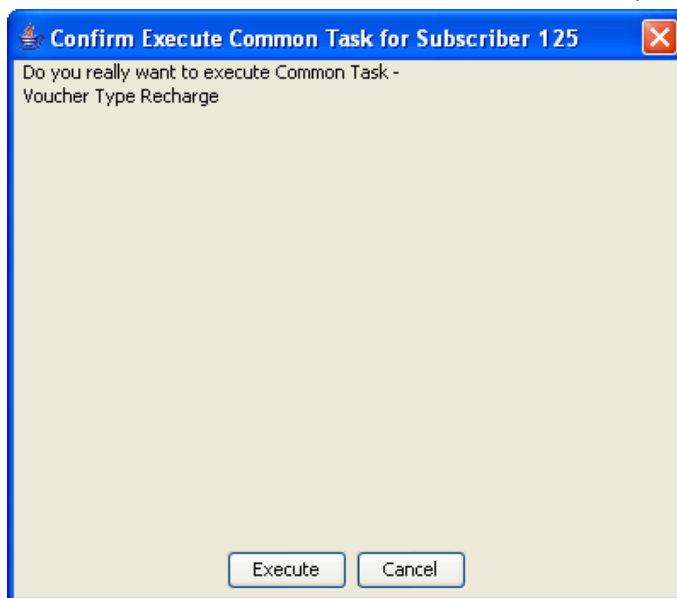
| 5 | If any parameters have been defined for the tasks, enter the values for these as prompted. |
| | **Warning:** You must enter a value for all mandatory parameters. |

Step	Action
6	Click **Execute**.
	Result: You see the Executing Common Task progress box.
	Then you see the Execute Common Task Result prompt.
	Note: If the task fails then a message giving the failure reason is displayed in the Execute Common Task Result screen.
7	Click **OK**.

History

Introduction

The search history for subscriber accounts and Vouchers is displayed on the **Subscriber** and **Voucher** tabs in the History panel. A new entry is added to the subscriber history each time a subscriber account is displayed in the Quick View panel. Similarly, a new entry is added to the voucher history each time a valid voucher is retrieved in the Vouchers panel.

History panel

Here is an example History panel from the CCP Dashboard screen.
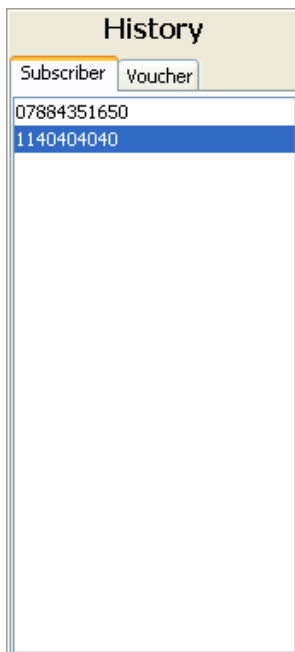
Viewing history

Follow these steps to view a historical list of subscribers or vouchers.

Step	Action
1	If the History panel is not currently visible in the CCP Dashboard screen, click **History** to display it.

Step	Action
2	In the History panel select the tab for the type of history you want to view. Select one of: • **Subscriber** • **Voucher**
3	Select an item from the history to review its details. Select one of: • Subscriber ID to view its details in the Quick View panel • Voucher ID to view its details in the Vouchers panel
	Tip: Double-click a subscriber ID to access its details in the Edit Subscriber screen.

Changing Your Password

Introduction

The Change Password screen appears when you click **Password** in the CCP Dashboard screen.

Use this screen to change the password for your user account.

Change Password Screen

Here is an example Change Password screen.

Changing your password

Follow these steps to change your password.

Step	Action
1	In the CCP Dashboard screen, click **Password**. **Result:** You see the Change Password screen.
2	Enter your current password in the **Old Password** field.
3	Enter your new password in the **New Password** field.
	Note: For security reasons, a password must be at least 8 characters long.
4	Re-enter your new password in the **Confirmation** field.
5	Click **OK** to save the changed password.

Locking and Unlocking the Dashboard

Introduction

If you need to leave your work station for a short period, then you can lock the CCP Dashboard screen so that the screen contents are protected. When you lock the CCP Dashboard, the screen is hidden from view and the CCP Dashboard Locked prompt is displayed. The CCP Dashboard will be redisplayed as soon as you reenter your original user name and password correctly.

You can make a maximum of three attempts to enter the correct user name and password combination. If you make more than three failed attempts, then you will receive a warning message and the CCP application will be terminated.

Note: The CCP Dashboard will also be locked automatically if the SMS quality of service feature is enabled and you have not used the CCP Dashboard for a configurable period of time.

For further information on this feature refer to *SMS User's Guide*.

Locking the dashboard

Follow these steps to lock the CCP Dashboard.

Step	Action
1	In the CCP Dashboard screen, click **Lock Dashboard**. **Result:** The CCP Dashboard screen is hidden from view and you see the CCP Dashboard Locked prompt.
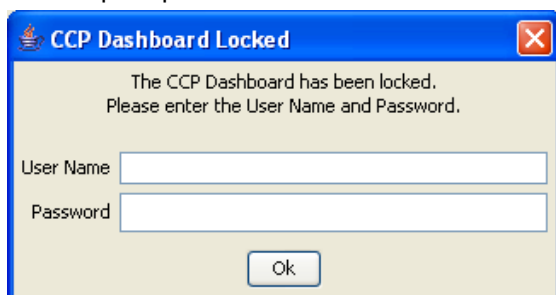
Unlocking the dashboard

Follow these steps to unlock the CCP Dashboard screen.

Step	Action
1	Enter your user name in the **User Name** field in the CCP Dashboard Locked screen. **Note:** This must be the same user name as the one you originally used to log in with for this session.
2	Enter your password in the **Password** field.
3	Click **Ok**. **Result:** The CCP Dashboard screen reappears.

Editing Subscribers

Overview

Introduction

This chapter explains how to access the Edit Subscriber screen from Oracle Communications Network Charging and Control Customer Care Portal, and edit subscriber details.

In this chapter

This chapter contains the following topics.

Editing a Subscriber

Introduction

The Edit Subscriber screen lets you change a subscriber's configuration. For example you can:

- Edit subscriber details
- Configure subscriber zones
- Add a secondary wallet
- Edit primary wallets and wallet balances
- Merge wallets
- View EDRs
- Execute BPLs
- Perform credit transfers

Note: The Edit Subscriber screen can also be opened from the Subscriber Management screen in Prepaid Charging. Refer to *Charging Control Services User's Guide* for more information.

Reverting unsaved changes

You can revert any unsaved changes to a subscriber's configuration by clicking **Revert**. The data will revert to the most recently saved version of the subscriber's configuration.

For details see *Reverting subscriber edits* (on page 32).

Edit subscriber screen layout

The configuration and layout for the Edit Subscriber screen is defined in the Subscriber Profile Manager (SPM). When you open the Edit Subscriber screen, the fields and options you see depend on the configuration defined in the SPM for the subscriber's product type and service provider (see following screen example). This means that you may see one of the following:

- The default configuration for the Edit Subscriber screen containing all the fields and options available as a standard
- A customized Edit Subscriber screen containing a subset of the standard fields and options, plus any subscriber profile groups, fields and zones that have been configured specifically for you. The labels given to the fields and options may also be different from the default labels

You see the available options listed in the menu on the left hand side of the screen. To view or edit the fields for a particular option, select the option in the list.

Note: For information on configuring the Edit Subscriber screen, refer to Subscriber Profile Manager User's Guide.

Accessing the Edit Subscriber screen

Follow these steps to open the Edit Subscriber screen for a selected subscriber.

Note: Only primary wallet information is available for editing when you open the Edit Subscriber screen from the CCP Dashboard.

Step	Action
1	In the CCP Dashboard screen, search for the subscriber to view or edit using the subscriber search fields. For details see *Finding a subscriber* (on page 20).
2	Highlight the row in the search results for the subscriber to edit.
3	Click **Open**.
	Result: You see the details of the subscriber selected from the search results in the Edit Subscriber screen.
	Tip: To quickly open the Edit Subscriber screen, double click the required entry in the search results.

Example Edit Subscriber screen

Here is an example Edit Subscriber screen configured to show subscriber details when the Promotions option is selected.

Access to elements of this screen are controlled by user permissions. If you cannot see some of the functionality described for this screen, your permissions may have been set to restrict access to that element.

Subscriber details groups

This table describes the function of the standard groups of fields that may be associated with subscriber details in the Edit Subscriber screen. Each group contains a standard set of fields, some of which may be editable.

Note: This table shows the default labels given to the subscriber details groups. Different labels may be used in your screens depending on how the Edit Subscriber screen is configured.

Group	Description
PIN	Sets the subscriber's PIN.
Confirm PIN	Confirmation of the subscriber's PIN.
Subscriber Information	Core information about the subscriber. For information purposes only.

Subscriber details fields

This table describes the function of the standard subscriber details fields that may be available in the Edit Subscriber screen.

Note: Some of these fields may have been given different labels in your screens depending on how the Edit Subscriber screen has been configured.

Field	Description
Card Number	Specifies the card number for the subscriber.
Subscriber ID	The calling line identifier (CLI) for this subscriber. This identifies the line that the call is being placed from. When a call is made, the system determines which wallet to charge based on the subscriber ID of the caller.
Description	A description for this subscriber.
Language	Sets the language to use for announcements for this subscriber.
Subscriber ID Restricted	Sets whether or not the subscriber may set the presentation restricted indicator in the outgoing connect message for services. For further information refer to *Charging Control Services User's Guide*.
Disable Incoming Calls When Roaming	Sets whether or not the subscriber may receive incoming calls while roaming.
Blacklisted	Sets whether or not the subscriber may use the service. When selected, the service will be disabled.
	For more information about blacklisted subscribers, see Adding Subscribers.
Disable SMS Notifications	Sets whether or not the subscriber may receive SMS notifications.

Editing configuration options

Follow these steps to edit the configuration options for a subscriber account.

Step	Action
1	In the Edit Subscriber screen, select the option from the left hand menu that holds the field to edit.
2	Enter the new details as required.
3	Repeat steps 1 and 2 for all the fields to edit.
4	When you have completed your edits, click **Save**.

Reverting subscriber edits

Follow these steps to revert unsaved changes to the subscriber configuration.

Step	Action
1	In the Edit Subscriber screen, click **Revert**. **Result:** Any unsaved changes to the subscriber configuration will be reversed and the subscriber will be redisplayed using the original data.

Configure Subscriber Zones

Introduction

Zones provide the facility to customize the services provided to the subscriber depending on their location. For example, a home zone could be defined where the subscriber may obtain cheaper calls.

A subscriber may have up to nine zones. Each zone can be configured to include a group of up to five rectangular and circular shapes. The location and area covered by each shape is determined by its coordinates (defined in latitude and longitude format). If required, the shapes may overlap.

Note: This functionality is only operational if the NCC Location Capabilities Pack (LCP) package is installed.

User access

You can access zones in the Edit Subscriber screen provided you have been given sufficient privileges.

This table describes the privileges that may be assigned to zone.

Privilege	Description
Read/Only	The zone will be visible through the screens, but you will not be able to edit, create, or delete it.
Read/Modify	The zone will be visible through the screens, and you will be able to edit it, but you will not be able to create or delete it. This means that you will be able to add, edit and delete shapes for the zone. However, if there is only one shape defined for the zone you will not be able to delete it because this would also delete the zone itself.
Create/Delete	The zone will be visible to the user through the screens, and you will be able to add, edit, and delete shapes for it even if there is only one shape defined for the zone. If you delete the only remaining zone shape, then the zone's profile tag will also be removed from the subscriber's profile.

Note: Access permissions are managed through the user templates defined in the Service Management System User Management screen. For information on creating and maintaining user templates, see *Service Management System User's Guide*.

Zone group

Zones are defined in zone group panels in the Edit Subscriber screen. A zone group panel can be included where needed using the Subscriber Profile Manager.

Here is an example zone group panel.

Adding a new zone shape

Follow these steps to add a new shape to a zone.

Step	Action
1	In the Edit Subscriber screen, select the option that holds the zone to add a shape to.
2	In the group for the zone, click **New**. **Result:** You see the New Zone screen.

3	Select the option for the zone shape, select one of: • Circular Shapes • Rectangular Shapes

Step	Action
4	If you are specifying a circular zone shape, in the boxes enter the coordinates for the center of the circle and its radius.
	• **X (Deg):** The longitude coordinate. Restricted to between -179.99999 (W) and 180.00000 (E) degrees.
	• **Y (Deg):** The Latitude coordinate. Restricted to between -90.00000 and 90.0000 degrees.
	• **R (Kms):** The radius. Restricted to between 0.0000000 and 99999999.9999999 kilometers.
5	If you are specifying a rectangular zone shape, enter the coordinates for the top left and bottom right corners of the rectangle.
	Top-Left Corner:
	• **X (Deg):** The longitude west coordinate. Restricted to between -179.99999 (W) and 180.00000 (E) degrees and must not equal the value for the longitude east coordinate.
	• **Y (Deg:** The latitude north coordinate. Restricted to between -90.00000 and 90.0000 degrees and must be a higher number than the latitude south coordinate.
	Bottom-Right Corner:
	• **X (Deg):** The longitude east coordinate. Restricted to between -179.99999 (W) and 180.00000 (E) degrees and must not equal the value for the longitude west coordinate.
	• **Y (Deg:** The latitude south coordinate. Restricted to between -90.00000 and 90.0000 degrees and must be a lower number than the latitude north coordinate.
6	Click **Save**.

Editing a zone shape

Follow these steps to edit a Zone shape.

Step	Action
1	In the Edit Subscriber screen, select the option where the zone to edit is defined.

Step	Action
2	In the zone group select the shape to edit and click **Edit**. **Result:** You see the Edit Zone screen.

3	Edit the shape definition as described in *Adding a new zone shape* (on page 34).
4	Click **Save**.

Deleting a zone shape

Follow these steps to delete a Zone shape.

Step	Action
1	In the Edit Subscriber screen, select the option where the zone shape to delete is defined.
2	In the zone group select the shape to delete and click **Delete**. **Result:** The zone shape is deleted.

Configuring Subscriber Options

Subscriber options

Here is a list of the available Subscriber Profile options.

- Call Barring
- Number Translation
- Credit Card
- Remote Access
- Friends and Family
- Closed User Groups
- Balance Topup Rules

Call Barring

Follow these steps to configure call barring for a subscriber.

Step	Action
1	Select the Call Barring option from the left hand menu.

Result: You see the Call Barring configuration options.

2	In the **Allowed/Barred List** section, select whether the listed numbers will be allowed or barred from the **List Type** drop down list.

> **Tip:** Depending on the list type, all numbers in the list are allowed, or all numbers are barred for this subscriber. It is not possible to have some allowed and some barred numbers in the list.

3	If you want the service to ignore the allowed/barred list for this Subscriber, select the **Ignore** check box.
4	Edit the Number List as required. To add a number to the list:

     a.   Enter the number in the **New Number** field.

     b.   Click **Add**.

     To delete a number from the list:

     a.   Select it in the **Number List**.

     b.   Click **Delete.**

5	Repeat step 4 until the number list contains all the required numbers.
6	Click **Save**.

Note: Allowed/barred lists may also have been set at the following levels:

- System-wide

- Service provider

- Product type

Number Translation

Follow these steps to configure the number translation details for a subscriber.

Step	Action
1	Select the Number Translation option from the left hand menu.
	Result: You see the Number Translation configuration options.
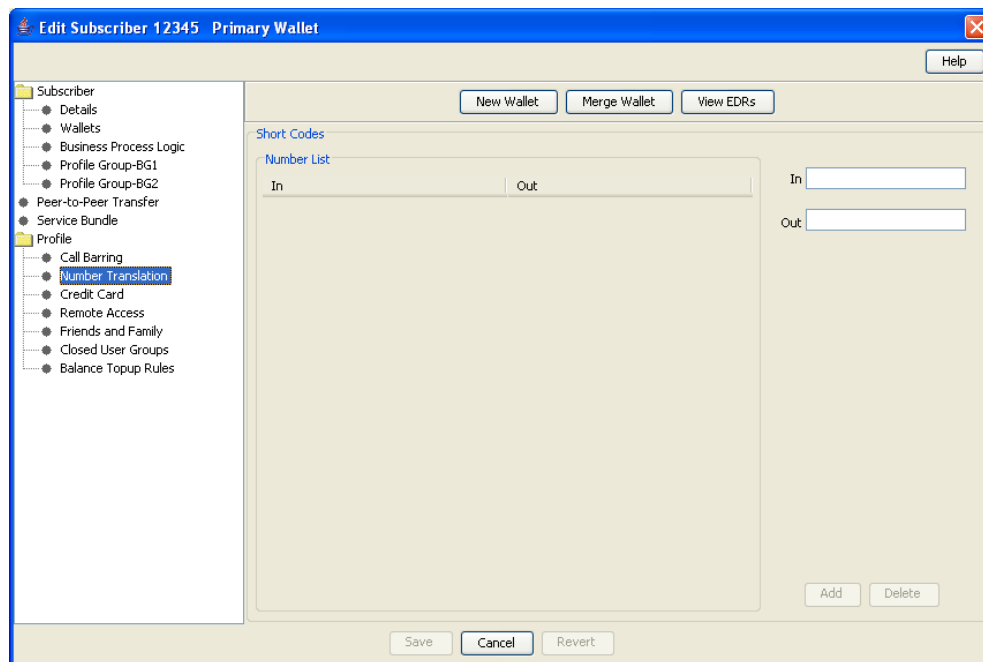
2	In the **Short Codes** section, edit the number list. To add a number to the list:
	a. In the **In** field, enter the service short code that you want to translate.
	b. In the **Out** field, enter the termination number that you want to translate the short service code to.
	c. Click **Add.**
	To delete a number from the list:
	a. Select the number in the **Number list**.
	b. Click **Delete**.
3	Repeat step 2 until the number list contains all the numbers that you require.
4	Click **Save**.

Note: Number translation may also have been set at the following levels:

- System-wide

- Service provider

- Product type

Credit Card

Follow these steps to configure credit card details for a subscriber.

Step	Action
1	Select the Credit Card option from the left hand menu. **Result:** You see the Credit Card configuration options.

2	In the **Credit Card Number** field, enter the credit card number for this subscriber.
3	In the **Expiry Date** drop down boxes, select the year and month on which the credit card will expire, and click **Reset**.
4	If the credit recharge facility should be enabled, select the **IVR Recharge Allowed** check box.
5	Click **Save**.

Friends and Family

Follow these steps to configure friends and family details for a subscriber.

Step	Action
1	Select the Friends and Family option from the left hand menu. **Result:** You see the Friends and Family configuration options.

Step	Action

2   From the **Active Service** option buttons, select the one the subscriber should have.

3   In the **Friends & Destination Settings** section, select the discount prefix for Friends and Destination from the **Discount Prefix** drop down list.

4   In the **Change Count** field, enter the total number of change counts for the subscriber.

5   From the **Change date** drop down list, select the day, month, year, hour and minute of the most recent change to the subscriber.

6   From the **Friends & Family Settings** section, enter the number of times the subscriber has been changed in the **Change count** field.

7   From the **Change date:** drop down list, select the day, month, year, hour and minute of the most recent change to the subscriber.

8   In the **Friends & Family Numbers** section, edit the **Number list**. To:
- Add a number, enter the number in the **New Number** field and click **Add**.
- Delete a number, select it in the list and click **Delete**.

9   Click **Save**.

Closed User Groups

Follow these steps to configure Closed User Groups for a subscriber.

Warning: This functionality is only available where rating management for the subscriber is either handled by the Voucher and Wallet Server, or a third party domain that supports closed user groups.

Step	Action

1   Select the Closed User Groups option from the left hand menu.
        Result: You see the Closed User Groups configuration options.

Step	Action
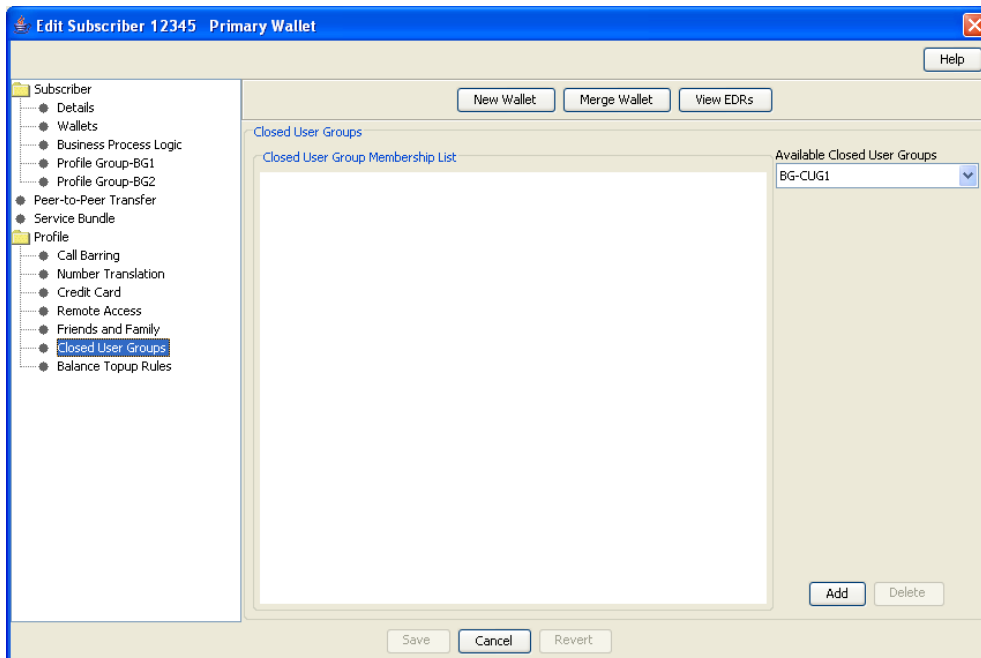
2 Update the **Closed User Group Membership List** for the Subscriber as required.

- To add a closed user group:
  - Select the CUG you want from the **Available Closed User Groups** drop down list
  - Click **Add**
- To remove a CUG from the list:
  - Select it in the Closed User Group Membership List
  - Click **Delete**.

3 Click **Save**.

Balance Topup Rules

The Balance Topup Rules option lets you view the active topup rules defined for the subscriber, and when they were last activated. The rules are used to allocate additional items, such as additional SMSs, to specified balance types on a regular basis. For details on creating and activating balance topup rules, see *Charging Control Services Technical Guide*.

Warning: This functionality is only available where rating management for the subscriber is handled by the Prepaid Charging VWS.

Follow these steps to view the active balance topup rules for a subscriber.

Step	Action
1	Select the Balance Topup Rules option from the left hand menu.
	Result: You see the Balance Topup Rules screen.

Step	Action
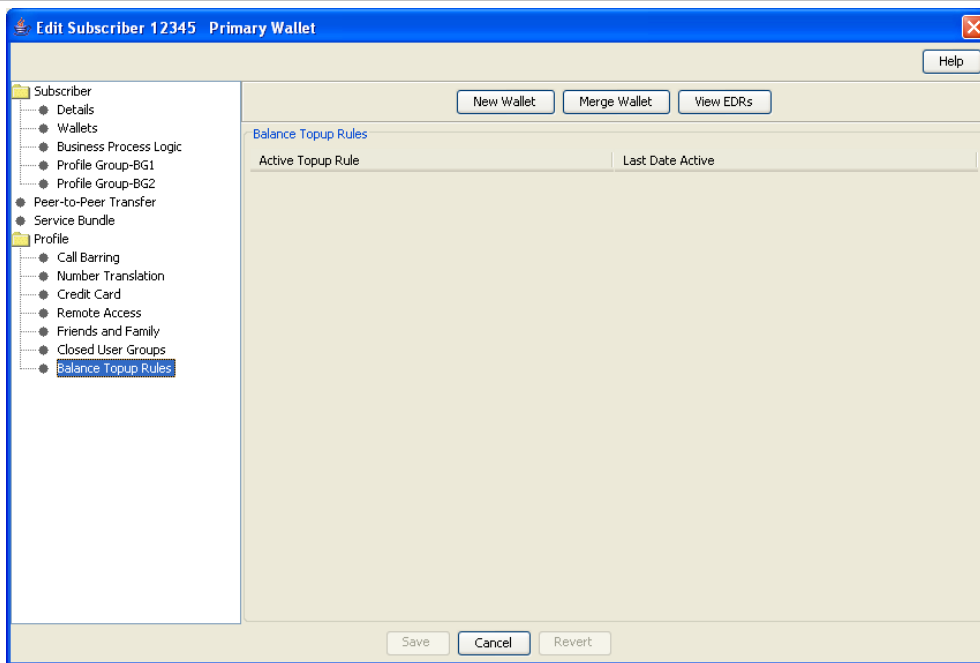
Remote Access

Follow these steps to configure remote access for a subscriber.

Step	Action
1	Select the Remote Access option from the left hand menu.
	Result: You see the Remote Access configuration options.
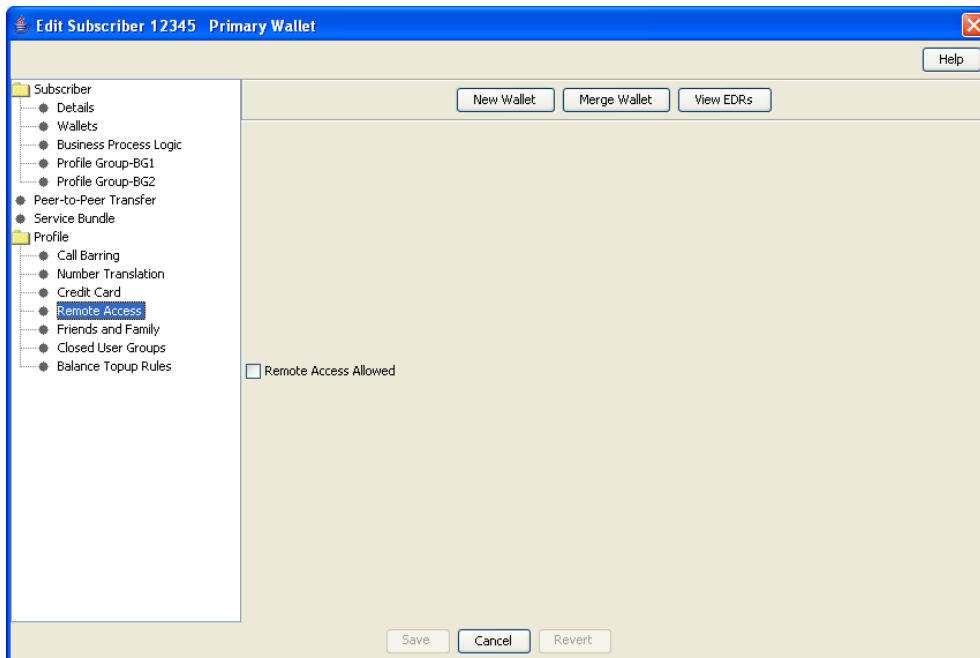
| 2 | If you want the subscriber to have remote access, select the **Remote Access Allowed** check box. |
| 3 | Click **Save**. |

Adding Wallets

Introduction

You can add a secondary wallet for a subscriber. The new wallet can be one of:

- Second private wallet
- Link to a shared wallet

When you add a new wallet, you must specify its domain. This determines whether rating management for the wallet is handled by the Prepaid Charging VWS or a third party.

New Wallet screen

Here is an example New Wallet screen. The **New Wallet** screen appears when you click **New Wallet** in the Edit Subscriber screen.

Adding a new Prepaid Charging VWS wallet

Follow these steps to add a new wallet to a subscriber on a Prepaid Charging VWS domain.

Step	Action
1	In the Edit Subscriber screen, click **New Wallet**.
	Result: You see the New Wallet screen.
2	Ensure **Link To Existing Wallet** is not selected.
3	From the **Domain** drop down list select a Prepaid Charging VWS domain.
	Note: The wallet reference will be generated automatically.
4	From drop down list, select the **Product Type** that will be associated with this wallet.
5	From the **Display Currency** drop down list, select the currency that the **Minimum Credit** field will be displayed in.

Step	Action
6	From the **Wallet Currency** drop down list, select the currency that will be used for monetary values for this wallet. All available currencies are displayed in this list.
7	If required, select the **Customer** from drop down list who will have access to this wallet.
8	Select the **Limit Type** from the drop down list that will be used for this wallet.
9	If you selected Limited Postpaid for the Limit Type, enter the minimum credit value for this wallet in the **Minimum Credit** field.
10	In the **Maximum Concurrent Accesses** field, enter the total number of accesses that can be supported against the wallet at any one time.
11	Click **OK** to save the new wallet.

Adding a new wallet for a third party domain

Follow these steps to add a new wallet to a subscriber using a third party domain.

Step	Action
1	In the Edit Subscriber screen, click **New Wallet**. **Result:** You see the New Wallet screen.
2	If this is a shared wallet, in the New Wallet screen, select **Link To Existing Wallet**. If this is not a shared wallet, ensure **Link To Existing Wallet** is not selected.
3	From the **Domain** drop down list, select the third party domain for the wallet.
4	Enter the identifier for the wallet in the **Wallet Reference** field. This can be the wallet reference for a linked wallet. If you leave this field blank then the reference is auto-generated and you must use the generated reference Id on the third party domain. **Warning:** The wallet reference is not validated by the system.
5	From the **Display Currency** drop down list, select the currency that the **Minimum Credit** field will be displayed in.
6	Click **OK** to save the new wallet.

Adding a new link to a wallet

Follow these steps to add a new link to an existing wallet for a subscriber.

Step	Action
1	In the Edit Subscriber screen, click **New Wallet**. **Result:** The New Wallet screen appears.
2	Select **Link To Existing Wallet**.
3	Enter the identifier for the shared wallet in the **Wallet Reference** field. You must enter an existing wallet reference.
4	Select the **Product Type** from the drop down list that will be associated with this wallet .
5	From the drop down list, select the **Display Currency** to use to display the minimum credit for the wallet.
6	Click **OK** to save the new linked wallet.

Edit Wallets

Introduction

The wallet information available in the Edit Subscriber screen will depend on the configuration defined for the product type and service provider for the subscriber (see following screen examples). This means that you may see one of the following:

- The default wallet configuration where all the standard wallet information fields are displayed under a single Wallet option.
- The Edit Subscriber screen may have been customized to contain a subset of the standard wallet information fields. This information may be available under a single option listed in the panel on the left hand side of the screen, or it may be split over more than one option. The labels given to the fields and options may also be different.

You see the available options listed in the menu on the left hand side of the screen. To view or edit the fields for a particular option, select the option in the list.

Default wallet configuration

The default configuration for the Edit Subscriber screen contains the following categories of information and fields for subscribers' wallets. Depending on how your screens have been configured, you will be able to edit some or all of this data:

- Wallet information
- Wallet expiry details
- Wallet history
- Wallet balances
- Product type
- Wallet state
- Customer

Wallet type

The Edit Subscriber screen, when accessed from the CCP Dashboard, lets you look at the wallet details for the subscriber's primary wallet. The wallet type is clearly indicated in the Edit Subscriber screen title.

Note: Secondary wallet information is only available in the Edit Subscriber screen when it is accessed through the Subscriber Management screen in CCS.

Example wallet details

Here is an example Edit Subscriber screen configured to provide wallet details when the Wallets option is selected. It shows how the information appears if the CCP is enabled on your system.

Access to elements of this screen are controlled by user permissions. If you cannot see some of the functionality described for this screen, your permissions may have been set to restrict access to that element.

Wallet field groups

This table describes the function of the standard groups of fields that may be available with a wallet in the Edit Subscriber screen. Each group contains a standard set of fields, some of which may be editable.

Note: This table shows the default labels given to the information groups. These labels may be different in your screens depending on how the Edit Subscriber screen has been configured.

Group Label	Description
Balance Types panel	A panel showing the available wallet balances. For details, see *Edit Wallet Balances* (on page 48).
Wallet Information	Core information about the wallet. For details, see *Editing wallet information* (on page 47).
Product Type, Wallet State, and Customer fields	Wallet attributes. For details, see *Product Type, Wallet State and Customer fields* (on page 47).
Wallet Expiry Details	Describes wallet expiry date (if any). For details, see *Setting wallet expiry dates* (on page 48).
Wallet History	For information purposes only. Provides details about the wallet history.

Wallet Information group

Here is an example **Wallet Information** group.

Editing wallet information

Follow these steps to edit the details in the Wallet Information group.

Warning: Although the names of the fields in the group remain the same, the group name will depend on how the Edit Subscriber screen has been configured.

Step	Action
1	From the left hand menu in the Edit Subscriber screen, select the option containing the Wallet Information group of fields.
2	In the Wallet Information panel select a different **Wallet Currency** from the drop down list, if required. This defines the currency used for monetary values for this Wallet.
3	If required, enter a new number for the **Maximum Concurrent Accesses** that can be supported against the subscriber at any one time.
4	If you have changed the subscriber's product type and you want to charge for this change then select the **Bill for Product Swap** check box. **Tip:** This charge is made when the current subscriber edits are saved. The next time you edit this subscriber this check box will have been cleared.
5	If you have completed your subscriber edits, click **Save**.

Product Type, Wallet State and Customer fields

This table describes the function of each field.

Field	Description
Product Type	The product type which applies when this subscriber uses this wallet.
Wallet State	The state the current wallet is in. A wallet's state controls what features of the service a wallet can use, and reflects where in the wallet life cycle the wallet is. For more information about the wallet life cycle, see Wallet lifecycle.
Customer	The customer the wallet is associated with. For more information about customers, see Customer.

Wallet Expiry Details group

Here is an example of the Wallet Expiry Details group fields.

Setting wallet expiry dates

Follow these steps to set the expiry date for a wallet.

Step	Action
1	From the left hand menu in the Edit Subscriber screen, select the option containing the Wallet Expiry Details group of fields.
2	In the Wallet Expiry Details group ensure **Define Wallet Expiry Date** is selected.
3	Select the **Wallet Expiry Date** from the drop down window.
	For more information about setting dates, see Time and Date panels.
4	If you have completed editing the subscriber, click **Save**.

Edit Wallet Balances

Introduction

You can view and edit balances for the wallets on the CCS VWS domain.

Note: If the wallet is on a third party domain then you will not be able to access balance type information in the Edit Subscriber screen.

For each balance type, you can specify:

- A set of bucket values and expiry dates
- The limit type
- The minimum credit (only available on general cash balances)
- The display currency (not valid for non-cash balances such as time or SMSs)

Bucket values are used to update balances. When you add a new bucket for a balance type, the bucket value is added to its current balance. When you edit a bucket value, the balance is changed to the new value.

Bucket expiry dates are used to define when the bucket balance will expire. When a bucket expiry date is reached, its balance is subtracted from the current balance value of the balance type.

Note: For time balance types, you specify bucket values in seconds. The value is shown on screen in both minutes and seconds. This functionality is only available if you have the appropriate license.

Balance Type area

Here is an example Balance Type area in the Edit Subscriber screen.

Balance Type	Limit Type	Total Value	First Expiry Date	Category
General Cash	Prepaid	91.84		Chargeable Balance
Promotional Cash	Prepaid	10.00	2010-10-19 15:10	Chargeable Balance
Bad Pin		0		Internal Balance
Monthly Exp		0.00		Expenditure Balance
Yearly Exp		0.00	2011-10-19 15:20	Expenditure Balance
Free SMS	Prepaid	1		Chargeable Balance

Display Currency GBP ▾   Details   Add Balance   All Balance Categories ▾

Changing the display currency

Follow these steps to change the currency used to display balance values.

Step	Action
1	On the left hand panel in the Edit Subscriber screen, select the Wallets option, containing the Balance Type area.
2	Select a different display currency from the drop down list. **Result:** The Total Value column in the **Balance Type** table will be re-displayed using the currently selected display currency.

Displaying balances by category

Follow these steps to display a selected balance category in the Balance Types panel.

Step	Action
1	On the left hand panel in the Edit Subscriber screen, select the Wallets, option containing the Balance Type area.
2	Select the Balance Category you want to display from the drop down list. **Result:** The **Balance Type** table is re-displayed showing only the balances for the selected balance category. Here is an example Balance Types panel showing balances for the Expenditure Balance Category.

Adding a new balance

Follow these steps to add a new balance to a wallet.

Warning: Once you have added a wallet balance and saved the subscriber record you will not be able to delete the balance.

Step	Action
1	On the left hand panel in the Edit Subscriber screen, select the option containing the Balance Types panel.
2	Click **Add Balance**. **Result:** You see the Add Balance for Subscriber screen.

3	Select the **Balance Type** to add from the drop down list. **Note:** You will only be able to choose a balance type that has not been added already.

Step	Action
4	In the **Value** field, enter the current value for the balance.
5	To set an expiry date for the balance:
	• Select the **Define Bucket Expiry Date** check box
	• Select the **Expiry Date** from the drop down window
	For details on selecting a date, see Time and Date panels.
6	Click **OK**.
	You are returned to the Edit Subscriber screen.
	Warning: The changes to the wallet balances will be saved only when you save the subscriber record.

Editing wallet balance details

Follow these steps to edit the balance details for a selected balance type for a wallet.

Step	Action
1	From the left hand menu in the Edit Subscriber screen, select the Wallets option, containing the Balance Types area.
2	Highlight the row in the **Balance Types** table for the balance to edit, and click **Details**.
	Result: You see the details screen for the selected balance.
3	To edit a bucket for the balance type, highlight the bucket in the **Buckets** table, and click **Edit**. Edit the details as described in *Adding a new bucket balance* (on page 51).
	To delete a bucket for the balance type, highlight the bucket in the Buckets table, and click **Delete**.
4	Edit the **Balance** fields as required.
	Tip: If you set the **Limit Type** for a cash balance to Limited Credit, then you can specify its minimum credit.
5	Click **OK** to return the Edit Subscriber screen.
6	If you have finished editing the subscriber, click **Save**.
	Warning: Changes to wallet balances are not saved until the subscriber record is saved.

Adding a new bucket balance

Follow these steps to add a new bucket for a balance type.

Step	Action
1	In the details screen for the selected balance type, click **New**.
	Result: You see the New Bucket screen for the balance type.

2	In the **Value** field, enter the new balance.
3	To specify an expiry date for the new bucket, select the **Define Bucket Expiry Date** check box.
	Result: The **Expiry Date** field is populated with today's date.
4	If required, select a different **Expiry Date**. For details, see Time and Date panels.
5	Click **OK**.
	Result: You see the new bucket balance in a new row in the Buckets table.
6	Click **OK** to return to the Edit Subscriber screen.
	Result: The balance for the new bucket is added to the existing balance for the balance type.

Merge Wallets

Introduction

The Merge Wallets option in the Edit Subscriber screen provides the facility to merge primary and secondary wallets. Typically you use this option to merge the wallets for a subscriber with the wallets of another subscriber. If required, you can also use the merge process to consolidate the primary and secondary wallets for a subscriber.

Note: You can only use the merge wallet facility if both the source and target wallets are on the VWS. If either wallet is on a third party domain then you will not be able to use this facility.

Merge wallet rules

The following rules apply to wallet merges:

1. Only one wallet pair may be merged at a time. Therefore two merge operations are required to merge both the primary and the secondary wallets for a subscriber with those of a different subscriber.
2. If the source wallet is in a pre-use state, then the wallet is activated and the activation bonus is applied prior to the merge.
3. Once the merge has taken place, the source and target subscribers will share the same wallet. Normally, the target wallet will be shared and the source wallet will be deleted. However, if a secondary wallet is specified as the target, and a secondary wallet has not yet been created for the target subscriber, then the source wallet is shared.

4 After the merge, the state of the shared wallet will normally be set to that of the target wallet. If the target wallet does not yet exist then it is set to the state of the source wallet.

Merge wallet expiry policy

The expiry policy for the merged wallet will be set to one of the following:

- Best – This means that the best of both wallet expiry dates will be used. In other words, if the target wallet expires before the source wallet, the expiry date of the target wallet is extended to match that of the source wallet.
- Ignore – This means that the expiry date of the target wallet is not changed.

The policy applies to the target wallet.

For more information on configuring the wallet expiry policy see *CCS Technical Guide*.

Merge bucket expiry policy

The bucket expiry policy for the merged wallet will be set to one of the following:

- Merge – This means that buckets in the source wallet may be merged with buckets in the target wallet. For this to happen:
  - A source wallet bucket must have an expiry date
  - The target wallet bucket must be of the same balance type

  The merged bucket takes the latest date of both buckets.
- Move – This means that buckets in the source wallet may be moved to the target wallet. For this to happen, a source wallet bucket must have an expiry date. The expiry date of the moved bucket is not changed.

For more information on configuring the bucket expiry policy see the *CCS Technical Guide*.

Source wallet state

The merge can only be processed if the source wallet is in an allowable state. For more information on configuring the allowable source wallet states, see *CCS Technical Guide*.

Merging a wallet

Follow these steps to merge either the primary or secondary wallet for the current subscriber with another wallet.

Step	Action
1	In the panel at the top of the Edit Subscriber screen click **Merge Wallet**. **Result:** You see the Merge Wallets screen.
2	In the **Source MSISDN** field, enter the CLI of the subscriber holding the source wallet for the

Step	Action
	merge.
	Note: The **Target MSISDN** field contains the CLI of the subscriber currently being edited. It is for reference only and cannot be changed.
3	Select the **Source Wallet Type** for the merge. Select one of:
	• Primary
	• Secondary
4	Select the **Target Wallet Type** for the merge. Select one of:
	• Primary
	• Secondary
5	Click **Save & Merge**.
	Result:
	1 Any changes to the subscriber configuration made in the Edit Subscriber screens are saved.
	2 The source and target wallets are merged.

View EDRs

Introduction

From the Edit Subscriber screen you can search for and view the EDRs that have been generated for the subscriber. For each EDR you can:

• View the EDR details
• Reverse any associated charges

Viewing EDR details

Follow these steps to view the details for a selected EDR.

The EDR Details for Subscriber screen cannot be edited beyond changing the currency information it is displayed in.

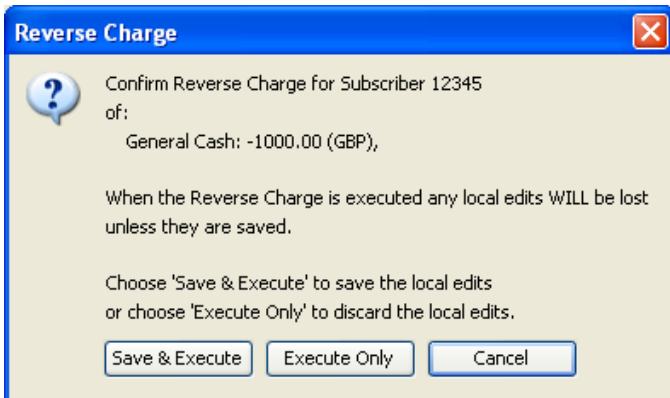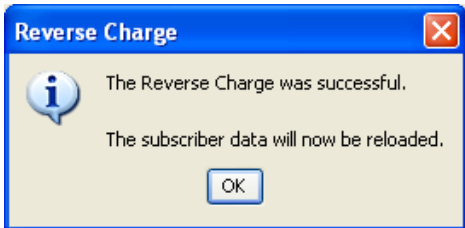To reverse a charge EDR, see the *Reversing a charge* (see page 54) procedure.

Step	Action
1	Select the EDR record to view in the search results table in the View EDRs for Subscriber screen.
2	Click **Display**.
	Result: You see the EDR Details for Subscriber screen.
	Notes:
	• The screen layout and available fields depend on the category and template definition configured for the EDR in CCS. For more information, refer to the *EDR Templates* topic in *Charging Control Services User's Guide*.
	• You cannot edit this screen. To reverse a charge EDR, see *Reversing a charge* (see page 54) procedure.

Step	Action

3	To change the currency used to display costs and balances, select the **Display Currency** drop down list.
4	When you have finished viewing that EDR record, click **Close**.
	Result: You return to the View EDRs for Subscriber screen.
5	When you have finished viewing EDR records, click **Close**.
	Result: You return to the Edit Subscriber screen.

EDR details

The EDR Details for Subscriber screen cannot be edited beyond changing the currency information it is displayed in.

To reverse a charge EDR, see the *Reversing a charge* (see page 54) procedure.

Reversing a charge

Follow these steps to reverse a charge detailed in an EDR record.

Step	Action
1	In the EDRs for Subscriber screen, search for the EDR record to reverse. For details on searching for EDRs see Finding EDRs.
2	Highlight the record in the search results table.

Step	Action
3	Click **Reverse Charge**.

Result: You see the Reverse Charge prompt.

Step	Action
4	Click **Save & Execute** to save any edits to the subscriber and then reverse the charge.
	Click **Execute Only** to reverse the charge without saving edits to the subscriber.
5	**Result:** You see the Reverse Charge prompt.

Step	Action
6	Click **OK**.

Result: The charge is reversed for all the affected balance types and the subscriber data is reloaded. You are then returned to the Edit Subscriber screen.

Business Process Logic

Introduction

A business process logic (BPL) task comprises a set of actions that fall within the defined business rules of the service provider, and that may be executed for the subscriber. Each business process is defined in the control plan referenced in the BPL record. When the BPL is executed, this control plan is invoked for the current subscriber.

Depending on how the BPL has been configured, a charge may be imposed for the service provided and SMS notifications may be sent out. For information on how to configure BPLs, refer to *Charging Control Services User's Guide*.

Notes:

• Business processes are also referred to as tasks.

• This functionality will only be available to you if you have an appropriate license.

Example BPL processes

Here are some examples of the processes that can be executed through a BPL:

- Product type swaps
- Profile updates
- Voucher type recharges
- Wallet state changes
- Credit transfers

Executing a BPL

Follow these steps to execute a BPL for a subscriber.

Note: BPLs can only be executed for existing subscribers.

Step	Action
1	In the Edit Subscriber screen select the Subscriber option where the BPL to execute is located.
	Result: You see a button for each of the available BPLs.
2	Click the button for the BPL to execute.
	Result: You see the Confirm Execute Business Process Logic for Subscriber prompt.

Step	Action
3	If any parameters have been defined for the BPL, enter values for these as prompted.
	Warning: You must enter a value for all mandatory parameters.
4	To save any changes you have made to the subscriber configuration in the Edit Subscriber screens and then execute the BPL, click **Save & Execute**.
	To execute the BPL without saving changes to the subscriber configuration, click **Execute Only**.
	Result: You see the Execute BPL Result prompt.
5	Click **OK**.

View Subscriber Promotions

Introduction

The Edit Subscriber screen can be configured to display the following types of promotion information:

- Subscriber promotion panel showing the list of promotions for which the currently selected subscriber is eligible
- Promotion information for a specific promotion.

Subscriber Promotion Panel

Here is an example Subscriber Promotion Panel in the Edit Subscriber screen.

Promotion	Status	Expiry Date	
BVset01	Unset		
BVset02	Unset		
BVset021	Unset		
GC Bonus Set01	Unset		
RichardsBonusSet	Unset		
Vince Promo 1	Unset		
Vince Promo 2	Unset		
Vince Promo 3	Unset		

Subscriber promotion panel fields

This table describes the function of each field.

Field	Description
Promotion	Lists the promotions for which the current subscriber is eligible.
Status	Displays the global limited liability status value for each promotion. Options are: • Unset • Eligible • Ineligible
Expiry Date	Displays the global limited liability status expiry date for each promotion.

Promotion Info Field example

Here is an example Promotion Info Field in the Edit Subscriber screen. This field has been configured with the **Monthly Spend** Display Name.

Monthly Spend		
	Name	Monthly Spend
	Status	Active
	Tracker Balance Value	0.00
	Tracker Balance Expiry Date	2009-12-25 16:46
	Individual Limited Liability Balance	
	Individual Limited Liability Expiry Date	
	Max Individual Limited Lialbility	
	Global Liability Status	Unset

Promotion info field fields

The Promotion Info Field displays status, balance and expiry details for a specified promotion. The promotion is specified when the Promotion Info Field is configured in the Subscriber Profile Manager.

This table describes the function of each field.

Field	Description
Name	Promotion name.
Status	Promotion status. Either active or inactive.
Tracker Balance Value	The total value of the tracker balance used to trigger the promotion for the subscriber.
Tracker Balance Expiry Date	Displays the first expiry date for the tracker balance. If an expiry date has not been specified, then "Does not expire" will be displayed. **Note:** This field will only be visible if the **Show Expiry Date** check box was selected when this Promotion Info Field was configured in the SPM.
Individual Limited Liability Balance	The subscriber's total balance held in the limit balance type configured for the promotion.
Individual Limited Liability Expiry Date	Displays the first expiry date for the individual limited liability balance. If an expiry date has not been specified, then `Does not expire` will be displayed.
Max Individual Limited Liability	Maximum individual limited liability configured for the promotion.
Global Liability Status	The options are • Unset • Eligible • Not Eligible

Credit Transfers

Introduction

The **Credit Transfers** option in the Edit Subscriber screen lets you perform credit transfers. A credit transfer moves credit from one subscriber to another. For information on how to configure credit transfers, see Transfer Management.

Note: The credit transfer functionality will only be available to you if you have an appropriate license.

Credit transfer types

Two types of credit transfer may be performed:

• Service bundle
• Peer-to-peer

Peer-to-Peer credit transfers

You use peer-to-peer credit transfers to one of the following:

• Transfer credit between the primary and secondary wallets held by an individual subscriber
• Transfer credit between the wallets held by two different subscribers

Service Bundle credit transfers

You use service bundle credit transfers to one of the following:

- Transfer credit between different balances held by an individual subscriber in the same wallet
- Transfer credit between two subscribers that share the same wallet

Credit transfer voucher type

When a credit transfer is performed, cash credit from the purchasing subscriber is used to buy a specified voucher type which is then applied to the recipient's wallet. The voucher type definition may include any of the following:

- A list of balance types where the value and/or the expiry periods have changed
- An extension to the recipient's wallet expiry period
- A product type swap on the recipient's wallet
- A limited list of available product types (the credit transfer will only succeed if the product type for the recipient matches one of the product types in the list)
- Multiple balance types which may also be associated with a limited list of product types

Performing a credit transfer

Follow these steps to make a credit transfer for a subscriber.

Step	Action
1	In the Edit Subscriber screen choose the credit transfer option you require from the left hand menu: • To make a peer-to-peer credit transfer, select **Peer-to-Peer Transfer**. • To make a service bundle credit transfer, select **Service Bundle**. **Result:** You see a series of buttons on the Edit Subscriber screen such as in this example. There is one button for each of the available credit transfer definitions.
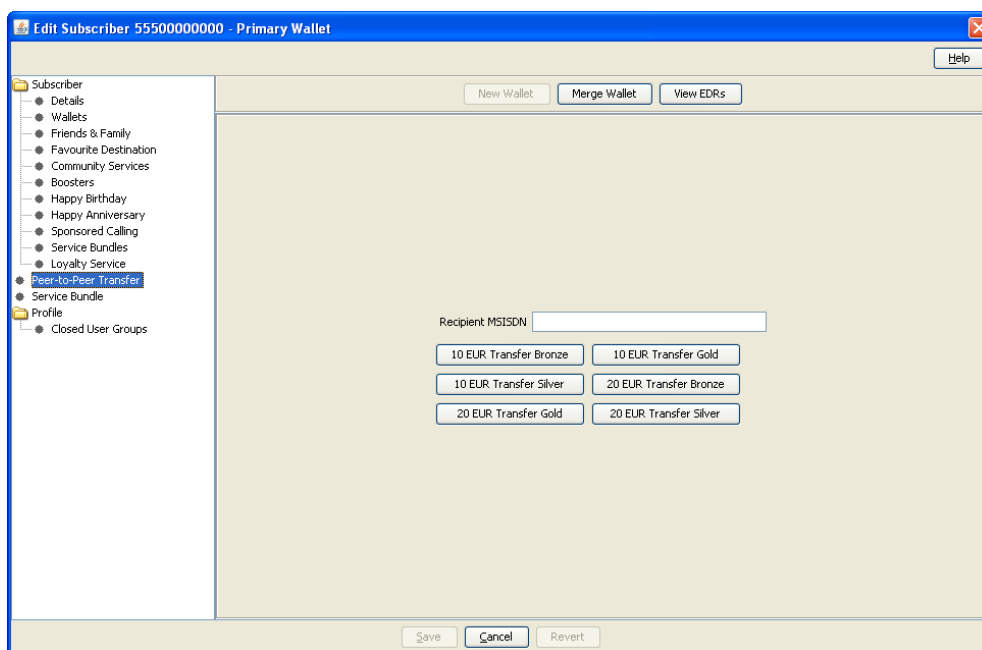
Step	Action
2	In the **Recipient MSISDN** field, enter the CLI for the subscriber who will receive the credit.
	Tip: This field is optional. If you do not enter a value, then the current subscriber ID is used.
3	Click the button for the credit transfer to make.
	Result: You see the Confirm Credit Transfer prompt.

Step	Action
4	If the subscriber has two wallets, then **Wallet Type** selection will be enabled for the purchaser/recipient. Select the required wallet types for the transfer.
5	If the **Security PIN** field is enabled then you must enter the PIN for the purchaser subscriber.
	Warning: The PIN must be already configured in the subscriber details.
6	To save any changes you have made to the subscriber configuration in the Edit Subscriber screens before making the credit transfer, click **Save & Execute**.
	To make the credit transfer without saving changes to the subscriber configuration, click **Execute Only**.

Vouchers in CCP

Overview

Introduction

This chapter explains how to search for vouchers, change the status of vouchers, and redeem vouchers from the CCP Dashboard in the Oracle Communications Network Charging and Control Customer Care Portal.

In this chapter

This chapter contains the following topics.

Vouchers

Introduction

The Vouchers panel in the CCP Dashboard screen lets you:

- Search for a voucher and view its details. See *Searching for Vouchers* (on page 62)
- Change the voucher status (providing you have sufficient privileges). See *Voucher Status* (on page 63)
- Redeem the voucher for a selected subscriber. See *Redeeming Vouchers* (on page 63)

Vouchers panel

Here is an example **Vouchers** panel in the CCP Dashboard screen.

Voucher information fields

This table describes the voucher information fields that may be available in the Vouchers panel.

Depending on how the Vouchers panel has been configured, the fields available to you will be a subset of these fields.

Warning: Fields may also have been given different labels.

Field	Description
Batch Code	The batch code for the voucher batch that includes this voucher.
Batch ID	Unique ID for the voucher batch.
Batch Name	The name of the voucher batch. This can be up to 50 characters long.
Batch State	The state of vouchers in the voucher batch. The batch states are: • Active • Created • Unavailable
PIN	The PIN for the voucher.
Private Secret	Encrypted voucher PIN.
Scenario	The voucher scenario used to redeem the voucher.
Serial Number	The voucher serial number.
Subscriber ID	The ID of the subscriber redeeming the voucher.
Voucher Activated	The voucher activation date.
Voucher Created	The voucher creation date.
Voucher Number	The voucher number and PIN.
Voucher Redeemed	The voucher redemption date.
Voucher Status	The voucher status. Available values are: • Created • Active • Frozen
Voucher Reference	Internal voucher number
Wallet Reference	The wallet reference of the redeeming wallet.

Searching for Vouchers

Introduction

You can search for a voucher in the Vouchers panel based on one of the following:

• Voucher Number
• Voucher Serial Number

When you find a voucher, its details are displayed in the information fields in the Vouchers panel. You will then be able to redeem the voucher against a selected subscriber or change the voucher status.

Finding a voucher

Follow these steps to look for a Voucher.

Step	Action
1	In the CCP Dashboard screen, select the **Service Provider** from the drop down list.

Step	Action
2	If the Vouchers panel is not currently visible, click **Vouchers** at the bottom right hand corner of the CCP Dashboard screen. **Result:** You see the Vouchers panel displayed in the bottom half of the screen.
3	In the Vouchers search fields, enter one of the following: • The voucher number in the **Voucher** field • The voucher serial number in the **Serial Number** field
4	Select the relevant search option. Select one of the following: • **Voucher** to search for a voucher number • **Serial Number** to search for a voucher serial number
5	Click **Search**. **Result:** If found, you see the relevant details from the voucher record in the information fields in the Vouchers panel. Refer to *Voucher information fields* (on page 61).
6	You may perform the following actions on the selected voucher: • Change the voucher status. See *Voucher Status* (on page 63) • Redeem the voucher. See *Redeeming Vouchers* (on page 63)

Voucher Status

Introduction

You can change the state of a voucher displayed in the Vouchers panel if you have sufficient privileges. If you have insufficient privileges you will be able to view the voucher state, but you will not be able to change it.

Changing voucher status

Follow these steps to change the status of a Voucher.

Step	Action
1	If the Vouchers panel is not currently visible in the CCP Dashboard screen, click **Vouchers** to display it.
2	Find the voucher whose status you want to change. See Finding a voucher for details. **Result:** You see the voucher details in the **Vouchers** panel.
3	Select the new status for the voucher from the **Voucher Status** drop down box. Refer to *Voucher information fields* (on page 61).
4	Click **Apply**. **Result:** You see the Voucher State Update Successful prompt.
5	Click **OK**.

Redeeming Vouchers

Introduction

You can redeem the voucher displayed in the Vouchers panel for a valid subscriber displayed in the Quick View. Before redeeming the voucher, you must ensure that the voucher scenario has been selected, and that the voucher PIN has been specified in the **PIN** search field.

Redeeming a voucher

Follow these steps to redeem a voucher for a subscriber.

Note: You will only be able to redeem the voucher if you have sufficient privileges.

Step	Action
1	If the Vouchers panel is not currently visible in the CCP Dashboard screen, click **Vouchers** to display it.
2	Find the subscriber for whom you want to redeem a voucher. See *Finding a subscriber* (on page 20) for details.
3	Select the subscriber ID in the search result panel or from the **Subscriber History** panel. **Result:** You see the subscriber details in the **Quick View** panel.
4	Find the voucher to redeem. See Finding a voucher for details. **Result:** You see the voucher details in the **Vouchers** panel. Refer to *Voucher information fields* (on page 61).
5	In the **PIN** search field, enter the voucher PIN.
6	If required, select a different scenario for the voucher from the **Scenario** drop down box.
7	Click **Redeem Voucher**. **Result:** The system will attempt to recharge the subscriber with the voucher. If it is successful, you see the Success prompt.
8	Click **OK**.

Glossary of Terms

AAA

Authentication, Authorization, and Accounting. Specified in Diameter RFC 3588.

ANI

Automatic Number Identification - Term used in the USA by long-distance carriers for CLI.

CC

Country Code. Prefix identifying the country for a numeric international address.

CCS

1) Charging Control Services component.

2) Common Channel Signalling. A signalling system used in telephone networks that separates signalling information from user data.

CLI

Calling Line Identification - the telephone number of the caller. Also referred to as ANI.

Diameter

A feature rich AAA protocol. Utilises SCTP and TCP transports.

DTMF

Dual Tone Multi-Frequency - system used by touch tone telephones where one high and one low frequency, or tone, is assigned to each touch tone button on the phone.

IN

Intelligent Network

ISDN

Integrated Services Digital Network - set of protocols for connecting ISDN stations.

IVR

Interactive Voice Response - systems that provide information in the form of recorded messages over telephone lines in response to user input in the form of spoken words or, more commonly, DTMF signalling.

LCP

Location Capabilities Pack - set of software components used by other applications to look up the location of mobile devices.

MSISDN

Mobile Station ISDN number. Uniquely defines the mobile station as an ISDN terminal. It consists of three parts; the country code (CC), the national destination code (NDC) and the subscriber number (SN).

PC

Point Code. The Point Code is the address of a switching point.

Peer

Remote machine, which for our purposes is capable of acting as a Diameter agent.

PIN

Personal Identification Number

SCTP

Stream Control Transmission Protocol. A transport-layer protocol analogous to the TCP or User Datagram Protocol (UDP). SCTP provides some similar services as TCP (reliable, in-sequence transport of messages with congestion control) but adds high availability.

Service Provider

See Telco.

SMS

Depending on context, can be:

- Service Management System hardware platform
- Short Message Service
- Service Management System platform
- NCC Service Management System application

SN

Service Number

TCP

Transmission Control Protocol. This is a reliable octet streaming protocol used by the majority of applications on the Internet. It provides a connection-oriented, full-duplex, point to point service between hosts.

Telco

Telecommunications Provider. This is the company that provides the telephone service to customers.

Telecommunications Provider

See Telco.

URL

Uniform Resource Locator. A standard way of specifying the location of an object, typically a web page, on the Internet.

VWS

Oracle Voucher and Wallet Server (formerly UBE).

Index