



Emersion Software Systems Pty Ltd

System Training – Session 6

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Session Contents



- Reports
- Events
 - Event types
 - Triggers
 - Actions
 - Event templates
 - Mass mailouts
- System administration
 - Roles and organisational units
 - Staff.

Reports



- Grouped into report sets: Finance, Service, EPS, Radius, and Billing
- Mapped to your account according to your system configuration and service types set up
- Can be viewed on screen
- Once viewed, can be exported to .CSV
- Can be scheduled to run periodically, automatically
- Can be emailed to you automatically, as well as placed on an FTP site.

Events



- Events processes a set of pre-defined *triggers* that automatically initiate *actions* when the particular condition is detected
- Each *action* is characterised by a *template* that defines the action the system performs
- Actions are linked to one or many *account profiles* to determine what accounts the action is performed against
- So an *event* is simply the complete mapping of a *trigger*, an *action*, *account profile*, and a *template*.

Events



- Each event *trigger* is defined for each *action* and mapped accordingly to your requirements
- There are basically two types of events available:
 - Account centric - examine customer records to determine whether certain conditions exist within the customer accounts, such as invoice overdue, credit card expired, and add new customer or service.
 - Process centric - check for other system process driven conditions, such as usage threshold reached, payment failed, and payment received.

Event Types



- Events types determine the condition, or conditions, each event will be triggered
- There are many event types, each with a set of specific, system defined trigger points or conditions
- The event is triggered when all the trigger conditions are met.
- E.g. the overdue invoice event may have trigger conditions based on the number of days overdue, the amount overdue and the number of overdue invoices.

Event Types



- Account Creation
- Account Status Change
- Account Add Package Subscription
- Account Package Migration
- Account Password Change
- Cancelled Package
- Invoice Post
- Invoice Delivery
- Invoice Due
- Invoice Overdue

Event Types continued



- Credit Card Expiry
- Automated Payment Received
- Manual Payment Received
- Payment Failed
- Shape Valid Service
- Remove Shaping from Valid Service
- Usage Threshold (Shaping)
- Rolling Usage Threshold
- Usage Over Limit (Shaped)
- Auto Renew Account Credit

Event Types continued



- Re-Rated Invoice Complete
- Re-Rendering an Invoice from UI
- Package Activated Event
- Report Generated
- Additional event types are always being added – keep an eye out for system release notes.

Triggers



- An event *trigger* is a condition, or conditions, that the system tests against to determine whether to initiate an event
- Many events require customised configuration that is specific to each event type and its specific trigger condition (set up by Emersion support)
- Most events are automated and require no specific thresholds to be set
- Some event triggers require detailed input to ensure that the event condition triggers correctly.

Actions



- Actions determine what the system performs when an event is triggered
- Multiple action types may be configured per event
 - E.g. the 'Invoice Overdue' event may record the details in the system log, send an email to the customer, and email your accounts staff
- Event actions must be associated with at least one account profile to trigger an event.

Action Types



➤ Message

- Creates an email using the *message template*
- A separate message template can be created for each action type

➤ Log

- Writes a record into the system log with details of the event

➤ Notification

- An *alert* or message displays at the top of the page when users log into the system

➤ Workflow

- Used to call an internal system *workflow* or process.

Templates



- Templates define the output of event actions
- Each template has a set of event variables
- Each event type has a different set of variables
- Pre-defined template types are used for each event action type
 - E.g. the *Account Password Changed* event has separate templates for the *Log* action, the *Notification* action, and the *Message* action.

Account Profiles



- Simple grouping of customer accounts
- An event can contain multiple actions, each of which can be linked to a different account profile
- Each event action must be linked to at least one account profile to trigger the event
- You can choose which account profile(s) to link to each event action
- You can create one or many account profiles
- However, each customer account can only be mapped to a single account profile.

Mass Mailout



- Uses the Event system to send bulk emails to customers
- You can use it to send any type of notice to your customers e.g. newsletters
- Set up via a mailout template, similar to event templates
- You can add recipients from your customer accounts
- Once you have confirmed the recipient list, the mass mailout can be saved and sent.

Roles & Organisational Units



- Organisational Units
 - Contain a set of Roles associated with each organisational area of your business
 - Can contain one or many Roles
- Roles
 - Contain a set of Permission groups needed to access various functions of the system
 - Can contain one or many Permission groups.

Permission Groups



- Contain the specific permissions that control each module or menu of the system
- Also control the specific actions available in each function
- Are set up and managed by Emersion support
- As new modules and functions are implemented the permission groups are updated.

Staff



- Staff allows you to set up system users
- Each user is assigned to a single organisational unit, which controls the user's permission
- Username set to '<name>@yourrealm.com'
- Password:
 - Minimum 8 characters
 - Case sensitive
 - Mix of upper and lower case
 - Cannot have 3 consecutive characters
- All passwords are encrypted.

Questions?

