Peregrine

Connect-It

2.7.1 - Product Integration

Peregrine SYSTEMS

This edition applies to version 2.7.1 of the licensed program

Connect-It

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1 Overview

This document will describe, in a general manner, the main points of the product integration project between TeleCenter, Asset Center and Service Center. For a detailed and specific description of integration points, scenarios, product tailoring, etc., please review the Connect-It Stored Procedure Standards document and/or the SCTCTailoring document.

Purpose - Target

This document, as well as all associated documents, is intended for internal use only. It was were written for the benefit of Peregrine Systems personnel, especially Professional Services, Research & Development, and Product Marketing, to better understand and deploy this integrated solution to the customer.

Software Version Requirements

The integration project currently works with the following versions of Peregrine Systems, Inc. software.

Table 1.1.

Software	Version
Connect-It	2.7.1
TeleCenter	3.5
AssetCenter	3.50, 3.51
ServiceCenter	3.0 sp3

2 | TeleCenter/AssetCenter Integration

CHAPTER

Integration Points

- In both directions: Directory information, including the transfer of employees, organizations, and locations. This is a full reconciliation of information including inserts, changes and deletes.
- From AssetCenter to TeleCenter: Asset charges in expense lines, both one-time purchases and long-term rentals, that are assigned to employees or departments.
- From TeleCenter to AssetCenter: Summarized call usage charges. Currently the usage charges are summarized by GL number. With minimal adjustments, this could be summarized by employee or by asset (such as trunks or switches). However, changing the summarization could result in a large number records being sent to AssetCenter.

AssetCenter Tailoring

To ensure the integrity of the data flow from AssetCenter to TeleCenter, and the proper functioning of the scenarios, several database configuration options and workflows must be set up in AssetCenter prior to using the scenarios.

- The history function of the **fullname** field in the **EmplDept** and **Location** tables must be turned on. This allows for change reconciliation of organizations and locations in TeleCenter

- Three workflows must be imported to track deletion of employees, organizations and locations, and the changing of phone records. These workflows will create output event records that allow for the deletion of reconciliation of employees, organizations, locations, and extensions in TeleCenter.

AssetCenter to TeleCenter Mappings

The following table describes the AssetCenter to Telecenter mappings

Table 2.1. AssetCenter to TeleCenter Mappings

AssetCenter Table	TeleCenter Table	Reconciliation Type	Description of Mapping
Outputevent	Orglevel	Delete	When a department is deleted from AC, a record is written in the Outputevents table so it can be reconciled and removed from TC.
History	Orglevel	Update Only	When a department is changed in AC, a record is written in the Histories table so it can be updated in TC. A back-end TC process also updates all dependent children records.
EmplDept	OrgLevel	Update or Insert	All department records, reconciled on the fullname, are updated or inserted into TC.
Outputevent	Location	Delete	When a location is deleted from AC, a record is written in the Outputevents table so it can be reconciled and removed from TC.
History	Location	Update Only	When a location is changed in AC, a record is written in the Histories table so it can be updated in TC. A back-end TC process also updates all dependent children records.
Location	Locations	Update or Insert	All location records, reconciled on the fullname, are updated or inserted into TC.

AssetCenter Table	TeleCenter Table	Reconciliation Type	Description of Mapping
Outputevent	Directory	Update Only	When an employee is deleted from AC, a record is written to the Outputevents table so it can be reconciled to TC. The employee is not deleted, rather a delete date is set. TC then allows the user to purge deleted records at any point, usually after a billing cycle.
EmplDept	Directory	Update or Insert	All employee records, reconciled on the ID number, are updated or inserted into TC.
Outputevent	Direac	Update Only	When an employee phone number changes, or an employee is deleted from AC, a record is written to the Outputevents table so it can reconciled to TC. The deletion date of the extension is set, and a back-end process also marks that extension as "not-in-use" in the extension pool.
EmplDept	Direac	Update or Insert	All employee phone records, reconciled on the ID number, are updated or inserted into TC.

AssetCenter Table	TeleCenter Table	Reconciliation Type	Description of Mapping
ExpenseLine	AdChrg	Update or Insert	All expense-line records assigned to an employee, reconciled on the Item Number, are updated or inserted into TC. Mapping restricted to expense lines with mDebit values only.
ExpenseLine	AdChrg	Update or Insert	All expense line records assigned to a department, reconciled on the Item Number, are updated or inserted into TC. Mapping restricted to expense lines with mCredit values only.

TeleCenter to AssetCenter Mappings

The following table describes TeleCenter to AssetCenter mappings.

Table 2.2. TeleCenter to AssetCenter Mappings

TeleCenter Table	AssetCenter Table	Reconciliation Type	Description of Mapping
Directory	EmplDept	Update or Insert	All employee records, reconciled on the ID number, are updated or inserted into AC.
OrgLevel	EmplDept	Update or Insert	All department records, reconciled on the fullname, are updated or inserted into AC.
Locations	Location	Update or Insert	All location records, reconciled on the fullname, are updated or inserted into AC.
TransLog	EmplDept	Delete	When a department is deleted from TC, a record is written in the Translog table so it can be reconciled and removed from AC.
TransLog	Location	Delete	When a location is deleted from TC, a record is written in the Translog table so it can be reconciled and removed from AC.
Directory	EmplDept	Delete	If a directory record has a deletion date set, that record is reconciled based on the ID number and deleted from AC.
SumGLCharges	ExpenseLine	Update or Insert	Call usage charges summarized by GL numbers and reconciled by callclass are updated or inserted into AC.

3 | TeleCenter/ServiceCenter Integration

CHAPTER

Integration Points

- In both directions: Directory information, including the transfer of employees, organizations, and locations. This is a full reconciliation of information including insert, changes and deletes.
- From ServiceCenter to TeleCenter: Charges in expense lines, stemming from parts and labor costs on problem tickets and work orders, that are assigned to employees or departments.

ServiceCenter Tailoring

To ensure the integrity of the data flow from ServiceCenter to TeleCenter, and the proper functioning of the scenarios, many system tailoring modifications must be made to Service Center prior to using these scenarios.

New Service Center Installations

For an out-of-the-box installation of Service Center, several unload files have been created to facilitate importing these changes. For a listing of the unload files, please refer to the Connect-It Stored Procedure Standards document. For a detailed description of the changes, please see the SCTCTailoring document.

Existing Service Center Installations

For existing Service Center 3.0 installations, loading the unload files listed above will probably damage any current customization. Please see the SCTCTailoring [SCTCTailoring.doc] document for a detailed description of the changes necessary to make Service Center ready to run the scenarios.

All Service Center Installations

These unload files contain the event registrations and event maps for the TeleCenter data import mappings. These mappings are used in conjunction with the TC2SC scenario. The operator unload file contains the operator record of Telecenter. This is the login used for running the TC2SC and SC2TC Connect-It scenarios. There is no need for a detailed description of these changes, as these will not yet exist on the client system; importing the unload files will suffice. For a list of what each file contains, please use the List Contents feature on the import screen in Service Center. These must be loaded to run the TC2SC scenario.

- **TcScCompany.unl**
- **TcScContacts.unl**
- **TcScDept.unl**
- **TcScDeptDel.unl**
- **TcScLocation.unl**
- **TcScLocDel.unl**
- **TcScInputSched.unl**
- **Operator.unl**

ServiceCenter to TeleCenter Mappings

The following table describes ServiceCenter to TeleCenter mappings.

Table 3.1. ServiceCenter to TeleCenter Mappings

Service Center Table	TeleCenter Table	Reconciliation Type	Description of Mapping
Delete Company	Orglevel	Delete	Reconciles deleted company records, and deletes matching records from TC.
Change Company	Orglevel	Update Only	Reconciles changed company records, and updates matching records in TC. A back-end TC process also updates all dependent children records.
Company	OrgLevel	Update or Insert	All company records, reconciled on the company, are updated or inserted into TC.
Delete Department	Orglevel	Delete	Reconciles deleted department records, and deletes matching records from TC.
Change Department	Orglevel	Update Only	Reconciles changed department records, and updates matching records in TC. A back-end TC process also updates all dependent children records.
Department	OrgLevel	Update or Insert	All department records, reconciled on the department, are updated or inserted into TC.
Delete Location	Location	Delete	Reconciles deleted location records, and deletes matching records from TC.

Service Center Table	TeleCenter Table	Reconciliation Type	Description of Mapping
Change Location	Location	Update Only	Reconciles changed location records, and updates matching records in TC. A back-end TC process also updates all dependent children records.
Location	Location	Update or Insert	All location records, reconciled on the location, are updated or inserted into TC.
Contacts	Directory	Update or Insert	All contact records, reconciled on the contact.name, are updated or inserted into TC.
Contacts	Direac	Update or Insert	All employee phone records, reconciled on the contact.name, are updated or inserted into TeleCenter. This includes car phones, extensions, pagers, and mobile phones.
Expline	Adchrg	Update or Insert	All expense line records assigned to an employee or a department, reconciled on the ID Number, are updated or inserted into TC.

TeleCenter to ServiceCenter Mappings

The following table describes TeleCenter to ServiceCenter mappings.

Table 3.2. TeleCenter to ServiceCenter Mappings

TeleCenter Table	ServiceCenter Table	Reconciliation Type	Description of Mapping
OrgLevel	Company	Update or Insert	All top-level organization records, reconciled on the fullname, are updated or inserted into SC.
OrgLevel	Department	Update or Insert	All non-top-level organization records, reconciled on the fullname, are updated or inserted into SC.
Locations	Location	Update or Insert	All location records, reconciled on the fullname, are updated or inserted into SC.
Directory	Contacts	Update or Insert	All employee records, reconciled on the ID number, are updated or inserted into SC.
Direac	Contacts	Update Only	All employee extension assignments including phone, pager and mobile records, reconciled on the ID number, are updated on the contacts record.
TransLog	Company	Delete	When a top-level organization record is deleted from TC, a record is written in the Translog table so it can be reconciled and removed from SC.

TeleCenter Table	ServiceCenter Table	Reconciliation Type	Description of Mapping
TransLog	Department	Delete	When a non-top-level organization record is deleted from TC, a record is written in the Translog table so it can be reconciled and removed from SC.
TransLog	Location	Delete	When a location record is deleted from TC, a record is written in the Translog table so it can be reconciled and removed from SC.