
PeopleSoft Enterprise Number Management 9.1 PeopleBook

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PeopleSoft Enterprise Number Management 9.1 Preface

This preface discusses:

- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleSoft Enterprise CRM business object management.
- PeopleSoft Enterprise CRM product and item management.
- PeopleTools PeopleBooks.

Note. All information found in this PeopleBook is applicable to PeopleSoft Enterprise CRM for High Technology.

PeopleSoft Enterprise CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.

- Interactions and 360-degree views.

This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface"

PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals

The *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook* contains essential information describing the setup and design of PeopleSoft CRM industry-specific applications and the use of features that are common to multiple applications within PeopleSoft CRM industry applications, including information about:

- Industry-specific tables.
- Industry-specific set IDs and roles.
- Products for industries.
- Arrangements and contracts.
- Industry-specific business objects.
- Application security for financial services.
- Financial accounts.
- Churn management.
- Fraud management.

See Also

PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook, "PeopleSoft Enterprise CRM Industry Application Fundamentals Preface"

PeopleSoft Enterprise CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools.

This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge Management.

This part discusses Verity Search setup.

- Business process management.

This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

- The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
- The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
- The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
- The setup and execution of business projects.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Enterprise CRM Services Foundation

The *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Order Capture, and the PeopleSoft call center applications (PeopleSoft Enterprise Support, PeopleSoft Enterprise HelpDesk, and PeopleSoft Enterprise HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*:

- Solution management.

Solution management enables users to establish a set of predefined solutions that call center agents and field service technicians can use to resolve customer problems.

- Transaction Billing Processor Integration.

PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. The integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on demand services.

- Environmental Systems Research Institute (ESRI) integration.

The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "PeopleSoft CRM Services Foundation Preface"

PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook has these parts:

- Business Object Management Basics.

This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems. PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Business Object Management Preface"

PeopleSoft Enterprise CRM Product and Item Management

The *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "PeopleSoft Enterprise CRM Product and Item Management Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.50 PeopleBooks.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Chapter 1

Getting Started with PeopleSoft Enterprise Number Management

This chapter provides an overview of Number Management and discusses:

- Number Management business processes.
- Number Management integrations.
- Number Management implementation.

Number Management Overview

Number Management utilizes the power of PeopleSoft CRM and provides industry-specific functionality to meet your business needs. Number Management enables you to provide full-featured support for all products and services that you offer to your customers.

Note. This book focuses on the setup and usage of Number Management functionality and does not discuss core PeopleSoft CRM setup or usage. You should review the references that are provided in each chapter before beginning your implementation.

Number Management Business Processes

Number Management enables users to:

- Create or import numbers.
- Make numbers available in number inventory.
- Manage the status, type, region, and category of individual numbers.
- Assign numbers.

Number Management Integrations

Number Management integrates with the following PeopleSoft applications:

- PeopleSoft Enterprise Support.
- PeopleSoft Enterprise Support for Customer Self Service.
- PeopleSoft Enterprise Integrated FieldService.
- PeopleSoft Enterprise Order Capture.
- PeopleSoft Enterprise Marketing.

Number Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for CRM 9.1 PeopleBook

Chapter 2

Setting Up Number Management

This chapter provides overviews of number lifecycle management, number management process flow, number categories and sub-categories, number formats, and Configuration table setup in Number Management and discusses how to:

- Set up the Configuration table.
- Set up number categories and sub-categories.
- Set up number formats.

Understanding Number Lifecycle Management

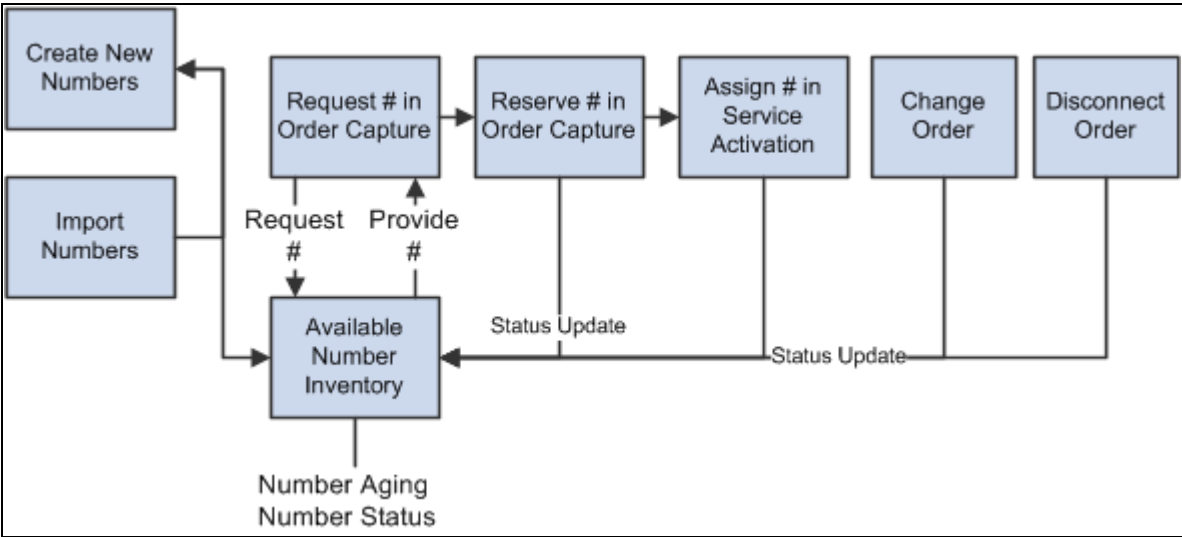
Number lifecycle management enables you to create and maintain an inventory of numbers and services that can be assigned to users during the order-capture process. For example, customers in the communications industry may need to maintain different pools of numbers for wireline service offerings and wireless service offerings. When assigning a number from these pools, you must ensure that the number is local to the customer, with the correct area code and prefix.

Number Management functionality controls the lifecycle of assignable numbers.

Number management components enable administrators to create and manage numbers. Each number is associated with a particular service product (wireless, wireline) and region. A single region is associated with one or more postal codes or cities.

Understanding the Number Management Business Process Flow

The following diagram illustrates the number management business process flow, including managing numbers (creating, importing, requesting, reserving, and assigning) and managing orders (changing and disconnecting):



Number management business process flow

Number Lifecycle

The table provides details on the number lifecycle:

Process	Details
Create or import numbers.	Numbers are loaded into the number tables using either the Number Creation wizard or the prebuilt number loading functions. Numbers can be loaded from external applications through flat files. Numbers can be generated in blocks or individually. When numbers are first created, the status is <i>Pending</i> .
Make number ranges available.	When numbers are ready for assignment, an administrator uses the Number Management component to change the status of the number range to <i>Available</i> .

Process	Details
<p>Assign numbers.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook</i>, "Using Order Capture and Service Management in the Communications Industry."</p>	<p>When a customer places an order, the customer service representative (CSR) enters the customer address. The system takes the sold to postal code from the region and searches the number inventory for numbers in that region with a status of <i>Available</i> . For example, the sold to postal code for the customer is 95054, and the number region is South Bay. When the CSR enters the postal code 95054 during the order process, the system displays numbers from the South Bay inventory. The product selection during the order process also determines number assignment. If the customer selects wireless, the system displays only those numbers designated as wireless.</p> <p>The CSR is presented with a block of numbers to offer to the customer. The NUMLISTVAL configuration variable determines how many numbers are presented in the group.</p> <p>The status of the group of numbers given to the CSR changes to <i>Blocked</i>. During the time that the numbers are in this status, no other CSR can use this group of numbers. Once the customer selects a number from the group, that number is assigned a status of <i>ActPending</i> (pending activation).</p> <p>Run the RBT_NMBLK_AE Application Engine process hourly to return all unused numbers from Blocked status to Available.</p> <p>The RBT_IPSTATUS_MSG changes the status of the number from ActPending to Assigned. The status is entered into the number history table.</p>
<p>Disconnect numbers.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook</i>, "Using Order Capture and Service Management in the Communications Industry."</p>	<p>When the number is disconnected, the status is changed to <i>Aging</i> and the status is entered into the number history table.</p> <p>Start and end dates for Aging status are entered based on configuration variables. The AGETIMEBUS variable establishes the number of days for aging business numbers. The AGETIMEIND variable establishes the number of days for aging individual customer numbers.</p> <p>Run the RBT_NMAGE_AE Application Engine process daily. If the end date is equal to the current date, the system changes the status to Active.</p>

Valid Number Statuses

The table shows valid number statuses:

Number Status	Usage
Available	The number can be selected by a CSR or customer.
Assigned	The number is already in use and cannot be assigned.
Reserved	The number has been either specifically placed on hold or has been selected by a customer or CSR, and the order transaction is not complete.
Pending	The number is not yet available for assignment. Numbers are in Pending status after they are either created or imported and entered into the system.
Activation Pending	The number has not yet been activated.
Aging	The number is being aged and is not yet available for assignment. You establish the number of days for aging both business and individual customer numbers in the Communication Setup component.
Blocked	The number is not available for use.
Ported-Out	The Number is Ported-out to external Service provider.
Released	The Number is released to the external Service provider who owns it.

See Also

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Using Order Capture and Service Management in the Communications Industry"

Understanding Number Categories

Number Management supports different categories and sub-categories of numbers. These categories can be set up to charge a fee.

This table lists the delivered number categories and sub-categories:

Category	Sub-Category	Product to track fee
General	Postpaid Account Number Prepaid Account Number	
Metallic	Platinum Gold Silver	Platinum Number Fee Gold Number Fee Silver Number Fee
Reserved		
Administrative	Employee Service Routing Key Employee or Official Number Local Directory Number Location Routing Number Test Number SoftDial Tone Number E911 Number	
Intermediate		

Note. Metallic numbers are also known as vanity numbers.

Understanding Number Format

The Number Format setup component defines the country in which the host provider operates along with the structure of phone numbers supported in that country.

The phone number format is compliant to World Telephone Numbering Guide and ITU-T Recommendation E.164. The structure is CC-NDC-LSP, where:

- CC is the Country Code.
- NDC is the National Destination Code.

This is same as the area code in the US.

- LSP is the locally significant part.

This is same as the 7 digits of phone numbers in the US.

Understanding Configuration Table Setup in Number Management

When setting up the Configuration table in Number Management, consider:

- The Configuration table establishes configuration parameters for your system.
- The Configuration table is delivered with default values and is maintained by PeopleSoft.
- The Configuration table is based on Set ID.

Setting Up the Configuration Table

This section discusses how to set up the Configuration table.

To set up the Configuration Table, use the Configuration (RBT_CONFIG_CMP) component.

Page Used to Set Up the Configuration Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Communications Setup	RBT_CONFIG_PG	Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup	View the configuration parameters that are delivered. Configuration parameters that you add are not maintained by PeopleSoft.

Defining Configuration Parameters

Access the Communications Setup page (Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup).

Communications Setup

SetID COM01

Configuration			Customize	Find	First	1-41 of 41	Last
*Name	*Value	Description					
AGETIMEBUS	90	Number Aging time for Bus Cust					+
AGETIMEIND	180	Number Aging time for Ind Cust					+
BILLSYSTEM	PORTAL	Billing System for Telco					+
FFMSYSTEM	PSFT	Fulfillment System					+
FRAUDBU	FRAUD	Business Unit for Fraud					+
FRAUDPG	FRAUD	Fraud Provider Group					+
INTEGRATBILL	ON	Billing Integration ON/OFF					+
MAXNUMLISTVAL	25	Max Numbers to show in assign					+

Copy Configuration to New SetID

Communications Setup page

**Copy above
Configuration
Parameters to a New
SetID**

Click to copy all of the configuration parameters to a new SetID that you have created.

Setting Up Number Categories and Sub-Categories

This section discusses how to set up number categories and sub-categories. A category may have a sub-category for which a price can be charged

To set up number categories and sub-categories, use the Number Category (RBT_CATEGORY_CMP) component.

Page Used to Set Up Number Categories and Sub-Categories

Page Name	Definition Name	Navigation	Usage
Number Category	RBT_CATEGORY_PG	Set Up CRM, Product Related, Communications, Number Category, Number Category	Set up number categories and sub-categories. The system displays the fee charged, if applicable. Pricing rules determine the actual price.

Setting Up Number Categories and Sub-Categories

Access the Number Category page (Set Up CRM, Product Related, Communications, Number Category, Number Category).

Number Category

Category Code SP

***Category Description** Metallic

Sub-Category							Customize	Find	View All		First	1-3 of 3	Last
Code	Description	SetID	Product ID	Product Description	List Price	Currency							
MG	Gold	COM0	TEL00002	Gold Number Fee	9.0000	USD							
MP	Platinum	COM0	TEL00001	Platinum Number Fee	10.0000	USD							
MS	Silver	COM0	TEL00002	Silver Number Fee	8.0000	USD							

Add Sub-Category

Number Category page

Setting Up Number Formats

This section discusses how to set up number formats.

To set up number formats, use the Number Format (RBT_NUM_FORMAT_CMP) component.

Page Used to Set Up Number Formats

Page Name	Definition Name	Navigation	Usage
Number Format	RBT_NUM_FORMAT_PG	Set Up CRM, Product Related, Communications, Number Format, Number Format	<p>Define the country of the host provider and the structure of the phone numbers.</p> <p>Note. A separate installation of CRM is needed for Customers operating across multiple countries.</p>

Setting Up Number Formats

Access the Number Format page (Set Up CRM, Product Related, Communications, Number Format, Number Format).

Number Format

*Wireless Service Provider

Network ID

Operating Company Number

*Country

Format

*Country Code

*Trunk Prefix

*International Prefix

*Number Distribution Factor

National Destination Code

Minimum Length Maximum Length

Locally Significant Part

*Minimum Length *Maximum Length

Number Format page

Wireless Service Provider

Select the name of the wireless service provider.

Network ID	This indicates the NPAC managed service provider ID of the new service provider requesting the port in.
Operating Company Number	The Operating Company Number of the new service provider requesting the port in. When the new local service provider is a reseller and they do not have an OCN, the value of ZZZZ should be used.
Country	The name of the country where the provider operates.
Country Code	The country code is used to reach the telephone system for each nation or special service.
Trunk Prefix	<p>A trunk prefix refers to the initial digit(s) to be dialed in a domestic call, prior to the area code (if necessary) and the subscriber number. 0 is the trunk prefix in most nations.</p> <p>In the North American Numbering Plan +1 it is 1; it is merely coincidental that the country code and trunk prefix are both 1.</p> <p>For calls to another country code, the trunk prefix is generally omitted. For example, a call to London, UK within the UK would be dialed as 020 #### #### but from outside the UK, the initial 0 (trunk prefix) is omitted: +44 20 #### ####.</p> <p>Some nations do not use a trunk prefix, which means only the subscriber number is dialed in those cases.</p>
International Prefix	<p>An international prefix is the code dialed prior to an international number (country code, area code if any, then subscriber number).</p> <p>In most nations, this will be 00. In some nations in Asia, this is 001 (in some cases, alternate codes are available to select the particular international carrier).</p> <p>In North America, this is 011 (or 01 for special call processing - collect, person-to-person, calling card, and so on.)</p>
Number Distribution Factor	<p>The Number Distribution factor further categorizes the number based on how close the customer is to the exchange.</p> <p>For example, in the Fremont area code 510, available Phone numbers are 510-659... or 510-657.... Therefore, based on zip code of the Customers address, the CSR can recommend 510-659.... number instead of 510-657....</p> <p>Countries that do not have area codes can have the numbers based on City.</p>
National Destination Code	The National Destination Code defines the minimum and maximum number of digits allowed for Area Code. The National Destination Code in the United States is referred to as the <i>area code</i> . It is used within many nations to route calls to a particular city, region or special service. Depending on the nation or region, it may also be referred to as a numbering plan area, subscriber trunk dialing code, national destination code or routing code. This information can be used to validate the length of the phone number.

Locally Significant Part The Locally Significant Part defines the minimum and maximum number of digits allowed for the Subscriber Index.

The subscriber number represents the specific telephone number to be dialed, but does not include the country code, area code, international prefix or trunk prefix. This information can be used to validate the length of the phone number.

In the United States, the size of Locally Significant Part number is 7.

Chapter 3

Administering Phone Numbers

This chapter provides an overview of number lifecycle management and discusses how to:

- Define regions.
- Add new numbers.
- Make numbers available.
- Reserve and unreserve numbers.
- Make numbers metallic.
- Manage numbers.
- Assign numbers.

Understanding Phone Number Lifecycle Management

Using Number Management, you can sell multiple service products requiring numbers to a geographically diverse customer base.

Defining Regions

Regions define how number blocks are grouped together for assignment. Regions can be geographical, defined by the service offering, or defined by postal codes.

Page Used to Defining Regions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Region	RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up and maintain regions for phone numbers.

Defining Regions

Access the Region page (Set Up CRM, Common Definitions, Location, Region Codes, Region).

Region

Category Number Management

Region ID 94086

Region Details

*Status

Active

Region Type

Postal Code-Wireless

*Description

94086

Parent Region ID

SOUTHBAY

South Bay

Region Hierarchy

Left | Right

+ 367-4000 - 367-4000

+ WESTERN - Western States

+ SOUTHWEST - Southwest States

- SOUTHBAY - South Bay

■ 94596 - 94596 - Active

■ 94588 - 94588 - Active

■ 94089 - 94089 - Active

■ 94086 - 94086 - Active

+ SO CAL - Southern California

+ NORTHBAY - North Bay

+ MIDWEST - Midwest States

+ EASTERN - Eastern States

Region page

Status	Select from <i>Active</i> and <i>Inactive</i> . The status must be <i>Active</i> for numbers to be available.
Region Type	Types that are specific to Number Management are <i>Service Area</i> , <i>Postal Wireline</i> , and <i>Postal Wireless</i> . A service area is the top-level region for number management; postal wireline and postal wireless are typically used for service area subregions.
Description	Enter a description for the region. The description appears in the region hierarchy.
Parent Region ID	Enter the region ID for the parent of the region that you are entering. This field sets up the hierarchical relationship for regions and enables you to create parent/child relationships.
Region Hierarchy	Displays the entire region hierarchy, including the current region.

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Adding New Numbers

You can create numbers using Number Management, or you can import numbers in a flat file. Numbers can be created individually or in blocks using a block range. Individual numbers or number blocks can be created for a specific region.

This section discusses how to:

- Import numbers
- Define number criteria
- Review numbers

To define number criteria, use the Add Numbers – Define Number Criteria (RBT_NUMCREATE_CMP) component.

Using a Flat File to Import Numbers

This table illustrates the structure for the Number Import input file.

REGION	NDC	LSP	CATEGOR Y	NUMBER DISTRIBUTION FACTOR	SUB- CATEGOR Y	TYPE	USAGE	ACTION
SOUTHBA Y	408	111222 2	AD	95117		PH	V	ADD
SOUTHBA Y	408	111222 3	AD	95117		PH	D	ADD
SOUTHBA Y	408	111222 4	AD	95117		PH	F	ADD
SOUTHBA Y	510	222333 3	RS	94530		PH	V	ADD
SOUTHBA Y	510	222333 4	RS	94530		PH	D	ADD
SOUTHBA Y	510	222333 5	RS	94530		PH	F	ADD
SOUTHBA Y	925	333444 4	SP	94566		MO	V	ADD
SOUTHBA Y	925	333444 5	SP	94566		MO	D	ADD
SOUTHBA Y	925	333444 6	SP	94566		MO	F	ADD

REGION	NDC	LSP	CATEGORY	NUMBER DISTRIBUTION FACTOR	SUB-CATEGORY	TYPE	USAGE	ACTION
SOUTHBA Y	415	444555 5	GN	94530	MG	PH	V	ADD
SOUTHBA Y	415	444555 6	GN	94530	MP	PH	D	ADD
SOUTHBA Y	415	444555 7	GN	94530	MS	PH	F	ADD
SOUTHBA Y	408	367120 0	GN	95117	MG	PH	A	UPDATE

Pages Used to Add New Numbers

Page Name	Definition Name	Navigation	Usage
Import Numbers	RBT_NUM_IMPORT_PG	Number Management, Import Numbers, Import Numbers	Import numbers in a flat file.
Add Numbers - Step 1: Define Number Criteria	RBT_CREATENUM_PG	Number Management, Manage Number, Add Number, Add Numbers - Step 1: Define Number Criteria	Select the criteria for phone numbers to be created.
Add Numbers - Step 2: Review Numbers	RBT_REVIEWNUM_PG	Click the Continue button on the Add Numbers - Step 1: Define Number Criteria page.	Review the number block before saving to number inventory.

Importing Numbers

Access the Import Numbers page (Number Management, Import Numbers, Import Numbers).

Import Numbers

▼ Attach Your Spreadsheet

File Name
Header lines to skip

Delete View Field Map

▼ Run the Import

The amount of time it takes to run the Import varies according to the size of the import file. For very large files, the process could take several minutes.

Run Import [Process Monitor](#)

Import history

User ID	CSPADMIN	Imported Date Time	08/20/2009 5:06:28.000000PM
---------	----------	--------------------	-----------------------------

Import Numbers page

- Delete** Click the Delete button to delete the uploaded file.
- View** Click the View button to display the contents of the uploaded file.
- Field Map** Click the Field Map button to display the mapping of the fields in the file with the fields in the destination table.
- Run Import** Click the Run Import button to save the entered information, assign a default run control ID, and run a batch job to import the numbers.

Defining Number Criteria

Access the Add Numbers - Step 1: Define Number Criteria page (Number Management, Manage Number, Add Number, Add Numbers - Step 1: Define Number Criteria).

Add Numbers

1
2

Step 1: Define Number Criteria

Select the criteria for the phone numbers to be created. Enter the region, setid, category, type, usage, starting number, and ending number, then click Continue.

*Region ID

*SetID

*Category

*Type

Sub Category

Usage

Zip Code

*Area Code

Subscriber Number

Prefix

*Starting Number

Ending Number

☒ Auto-Generated Next Block
 ☐ Specify Ending Number

size :

Continue >>

Add Numbers - Step 1: Define Number Criteria page

Region ID	Select a region for the number to be created.
SetID	Select the setID for Communications to get the number configuration.
Category	Select from <i>Administrative, General, Intermediate, Metallic</i> or <i>Reserved</i> .
Type	Select the type of number, either <i>wireless</i> or <i>wireline</i> .
Sub Category	Select a sub category for the number. This is optional.
Usage	Select the usage of the number such as <i>Voice, Fax</i> or <i>Data</i> .
Zip Code	Enter the zip code for the number.
Area Code	Enter the area code for the country in which the provider is operating, if applicable. The area code length must be within the minimum and maximum NDC length defined in the Number Format setup.
Prefix	Use the Prefix field to enter optional leading zeroes.

- Starting Number** Enter the beginning number for the block.
- Ending Number - Auto-generated next block** Select the range of Subscriber numbers. If you use an auto-generated block, the system will use the block size setup as a parameter for communications. The subscriber length must be within the minimum and maximum LSP length defined in the Number format setup.
- Specify end number** Enter the end number for the range if you do not auto-generate the block.

Reviewing Numbers

Access the Add Numbers - Step 2: Review Numbers page (click the Continue button on the Add Numbers - Step 1: Define Number Criteria page).

Add Numbers

1

2

Step 2: Review Numbers

Number Range: 925-6948000 to 925-6948099

Existing Numbers

No existing numbers found.

Add Numbers

These Phone numbers will be added. To exclude any number, clear its checkbox. Click on 'Add Numbers' button to proceed.

Phone Numbers					
Find View All [Grid Icon] [List Icon] First 1-5 of 100 Last					
Select	Area Code	Subscriber Number	Category	Type	Status
<input checked="" type="checkbox"/>	925	6948000	General	Wireline	Pending
<input checked="" type="checkbox"/>	925	6948001	General	Wireline	Pending
<input checked="" type="checkbox"/>	925	6948002	General	Wireline	Pending
<input checked="" type="checkbox"/>	925	6948003	General	Wireline	Pending
<input checked="" type="checkbox"/>	925	6948004	General	Wireline	Pending

☐ Check All / Clear All

Add Numbers

Add Numbers - Step 2: Review Numbers page

By default all numbers are selected. Clear all or specific numbers if no action needs to be taken.

Making Numbers Available

Your organization needs a supply of assignable numbers available for customers. When the number inventory is low, you need to make new numbers available. Numbers can be made available individually, or in blocks using a block range. Individual numbers or number blocks can be made available for a specific region.

To make numbers available:

1. Select the region, setID, category, type, and starting number. Select auto number generation to specify the end number.

Region, setID, area code, and starting number are required fields.

2. Review the number list before saving to the available number inventory.

Note. The interface for making numbers available is similar to adding new numbers.

See [Chapter 3, "Administering Phone Numbers," Adding New Numbers, page 17](#).

Pages Used to Make Numbers Available

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Make Numbers Available - Step 1: Define Number Criteria	RBT_CREATENUM_PG	Number Management, Manage Number, Make Number Available, Make Numbers Available - Step 1: Define Number Criteria	Use this page to define the region, category, type, starting and ending numbers, and an optional prefix for leading zeroes. Number status will be changed from <i>Pending</i> to <i>Available</i> .
Make Numbers Available - Step 2: Review Numbers	RBT_REVIEWNUM_PG	Click the Continue button on the Make Numbers Available - Step 1: Define Number Criteria page.	Use this page to review the number block before saving to the available number inventory.

Reserving and Unreserving Numbers

Number Management allows numbers to be reserved by businesses. The general category Numbers with 'Available' status can be only reserved. The reserved Numbers that are in available status can be only unreserved. For example, a company may want to reserve all the numbers in the 925 area code with the Subscriber Number prefix 694. In this case, administrators can reserve these numbers using a similar interface to creating and making numbers available. Numbers can be unreserved in the same way.

To reserve numbers, use the Reserve Number (RBT_RESERVENUM_CMP) component.

To unreserve numbers, use the Unreserve Number (RBT_UNRESERVE_NUM) component.

Note. The interface for reserving and unreserving numbers is the same.

Pages Used to Reserve and Unreserve Numbers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Reserve Numbers - Step 1: Select Customer	RBT_SELECT_CUST	Number Management, Manage Number, Reserve Number, Reserve Numbers - Step 1: Select Customer	Select the customer for reserving the phone numbers.
Reserve Numbers - Step 2: Define Number Criteria	RBT_CREATENUM_PG	Click the Continue button on the Reserve Numbers - Step 1: Select Customer page.	Define the region, category, type, starting and ending numbers, and an optional prefix for leading zeroes.
Reserve Numbers - Step 3: Review Numbers	RBT_REVIEWNUM_PG	Click the Continue button on the Reserve Numbers - Step 2: Define Number Criteria page.	Review the number block before reserving.
Unreserve Numbers - Step 1: Select Customer	RBT_SELECT_CUST	Number Management, Manage Number, Unreserve Number, Unreserve Numbers - Step 1: Select Customer	Select the customer for unreserving the phone numbers.
Unreserve Numbers - Step 2: Define Number Criteria page	RBT_CREATENUM_PG	Click the Continue button on the Unreserve Numbers - Step 1: Select Customer page.	Define the region, category, type, starting and ending numbers, and an optional prefix for leading zeroes.
Unreserve Numbers - Step 3: Review Numbers	RBT_REVIEWNUM_PG	Click the Continue button on the Unreserve Numbers - Step 2: Define Number Criteria page.	Review the number block before unreserving.

Selecting the Customer

Access the Unreserve Numbers - Step 1: Select Customer page (Number Management, Manage Number, Unreserve Number, Unreserve Numbers - Step 1: Select Customer page).

The screenshot shows a web interface titled "Unreserve Numbers" with a progress bar indicating three steps, with the first step being active. Below the title, the heading "Step 1: Select Customer" is displayed. The instruction "Select the Customer for unreserving the Phone Numbers." is shown. The form contains two labels: "Customer" and "Contact". The "Customer" field has the text "Advanced Consulting" and a magnifying glass icon. The "Contact" field has the text "Mary Lewis" and a magnifying glass icon. Below the "Contact" field is a link "Search Again" with a magnifying glass icon. At the bottom of the form is a button labeled "Continue >>".

Unreserve Numbers - Step 1: Select Customer page

Note. The pages used to reserve numbers and unreserve numbers use the same interface.

Defining Number Criteria

Access the Unreserve Numbers - Step 2: Define Number Criteria page (click the Continue button on the Unreserve Numbers - Step 1: Select Customer page).

1

2

3

Unreserve Numbers

Step 2: Define Number Criteria

Select the criteria for the phone numbers to be created. Enter the region, setid, category, type, usage, starting number, and ending number, then click Continue.

*Region ID

North Bay

*SetID

COM01

Category

Reserved

Type

Sub Category

Usage

Zip Code

*Area Code

925

Subscriber Number

Prefix

*Starting Number

6941150

Ending Number

☒ Auto-Generated Next Block
 size : 100
 ☐ Specify Ending Number

<< Back

Continue >>

* Required Field

Unreserve Numbers - Step 2: Define Number Criteria page

Note. The pages used to reserve numbers and unreserve numbers use the same interface.

Region ID	Select a region for the number to be created.
SetID	Select the setID for Communications to get the number configuration.
Category	Select from <i>Administrative, General, Intermediate, Metallic</i> or <i>Reserved</i> .
Type	Select the type of number, either <i>wireless</i> or <i>wireline</i> .
Sub Category	Select a sub category for the number. This is optional.
Usage	Select the usage of the number such as <i>Voice, Fax</i> or <i>Data</i> .
Zip Code	Enter the zip code for the number.

- Area Code** Enter the area code for the country in which the provider is operating, if applicable. The area code length must be within the minimum and maximum NDC length defined in the Number Format setup.
- Prefix** Use the Prefix field to enter optional leading zeroes.
- Starting Number** Enter the beginning number for the block.
- Ending Number - Auto-generated next block** Select the range of Subscriber numbers. If you use an auto-generated block, the system will use the block size set up as a parameter for communications. The subscriber length must be within the minimum and maximum LSP length defined in the Number format setup.
- Specify end number** Enter the end number for the range if you do not auto-generate the block.

Reviewing the Numbers

Access the Unreserve Numbers - Step 3: Review Numbers page (click the Continue button on the Unreserve Numbers - Step 2: Define Number Criteria page).

Unreserve Numbers

1
2
3

Step 3: Review Numbers

Number Range: 925-6941150 to 925-6941249

Unreserve Numbers

These Phone numbers will be unreserved. To exclude any number, clear its checkbox. Click on 'Unreserve Numbers' button to proceed.

Select	Area Code	Subscriber Number	Category	Type	Status
<input checked="" type="checkbox"/>	925	6941150	General	Wireless	Available
<input checked="" type="checkbox"/>	925	6941151	General	Wireless	Available
<input checked="" type="checkbox"/>	925	6941152	General	Wireless	Available
<input checked="" type="checkbox"/>	925	6941153	General	Wireless	Available
<input checked="" type="checkbox"/>	925	6941154	General	Wireless	Available

☐ [Check All / Clear All](#)

<< Back
Unreserve Numbers

Unreserve Numbers - Step 3: Review Numbers page

Note. The pages used to reserve numbers and unreserve numbers use the same interface.

Making Numbers Metallic

Number Management enables you to make general category numbers into metallic or vanity numbers. This is for numbers that have already been created. For example, you may decide that the number 925-694-7777 should be a metallic number. In this case, you can make the number a metallic number with a similar interface to creating and making numbers available.

To make numbers metallic, use the Make Number Metallic (RBT_VANITYNUM_CMP) component.

Note. The interface for making numbers metallic is similar to adding numbers.

See [Chapter 3, "Administering Phone Numbers," Adding New Numbers, page 17](#).

Pages Used to Make Numbers Metallic

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Metallic Numbers - Step 1: Define Number Criteria	RBT_CREATENUM_PG	Number Management, Manage Number, Make Number Metallic, Metallic Numbers - Step 1: Define Number Criteria	Use this page to define the region, category, type, starting and ending numbers, and an optional prefix for leading zeroes.
Metallic Numbers - Step 2: Review Numbers	RBT_REVIEWNUM_PG	Click the Continue button on the Metallic Numbers - Step 1: Define Number Criteria page.	Use this page to review the number block before making the numbers metallic.

Managing Numbers

This section discusses how to:

- Manage numbers.
- View number history.
- View number audit information.

Pages Used to Manage Numbers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search Number	RBT_NUM_SRCH_PG	Number Management, Search Number	Search for specific numbers.
Number Information	RBT_NUMBER_PG	Number Management, Search Number, Number Information	Manage number status, type, region, and category.
Number History	RBT_NUMHIST_PG	Number Management, Search Number, Number History	View number history.
Number Audit	RBT_NUMAUDIT_PG	Number Management, Search Number, Number Audit	Audit changes made to the number.

Maintaining Numbers

Access the Number Information page (Number Management, Search Number, Number Information).

Number Information Number History Number Audit

Area Code 171 **Subscriber Number** 3674567

Number Information

*Region ID Southwest States *Status Available

*Type Wireline Usage

*Category General Sub Category

☐ Ported In Number Zip Code

Port From Ported To

Modified 02/05/2002 5:27PM PST TELCODEMO

* Required Field

Number Information page

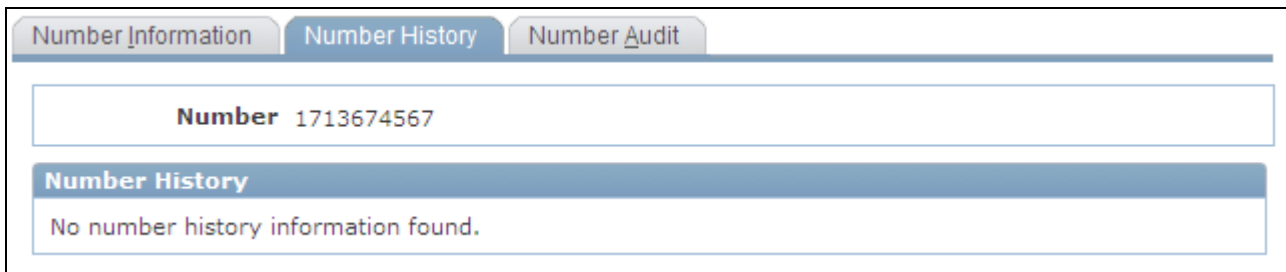
Area Code

Displays the area code for the number. This is hidden if no national destination code is defined in the Number Format.

Subscriber Number	Displays the mobile identification number for wireless service or phone number for local service.
Region ID	Select the region ID for the number. When a user requests a number, only the numbers within the valid region are presented. Regions are selected from the RB_REGION prompt table.
Status	<p>Select from <i>Activation-Pending</i>, <i>Active</i>, <i>Aging</i>, <i>Available</i>, <i>Blocked</i>, <i>Pending</i>, <i>Ported-Out</i>, <i>Released</i>, or <i>Reserved</i>.</p> <p>Numbers with <i>Assigned</i> status cannot be changed or deleted.</p> <p><i>Ported-Out</i> indicates that the provider owned number is ported-out to external carrier.</p> <p><i>Released</i> indicates that the external carrier owned number is released to external carrier, after the services are disconnected. This external carrier may or may not be the actual owner of this number but it is known that the number was ported-out last by this carrier.</p>
Type	Select the type of number. Number types segment different types of numbers to be used with multiple products that use different number ranges.
Usage	Select <i>Data</i> , <i>Fax</i> , or <i>Voice</i> .
Category	Select <i>Administrative</i> , <i>General</i> , <i>Intermediate</i> , <i>Metallic</i> , or <i>Reserved</i> .
Sub Category	Enter a sub category, if applicable.
Ported In Number	Select to indicate that the number is ported in from an external carrier.
Zip Code	Enter the zip code for the number. Alternately, this can be a City based on the Number distribution factor defined in the Number Format setup,
Port From	Select the name of the external carrier that the number is ported from. Use this if you have selected Ported In Number. This value is set by the Port-In Process.
Ported To	Select the name of the external carrier that the number is ported to. Use this if the status is <i>Ported-Out</i> .
Reserved By	The Reserved By section is displayed only if the Category is <i>Reserved</i> .
Aging Start Date and Aging End Date	<p>The Aging Information section will be displayed only if the status is <i>Aging</i>.</p> <p>When a number is disconnected, the system enters the aging start and end dates. You establish the aging variables in the Communication Set Up component. AGETIMEBUS establishes the number of days for aging business numbers. AGETIMEIND establishes the number of days for aging individual customer numbers.</p>

Viewing Number History

Access the Number History page (Number Management, Search Number, Number History).



The screenshot shows a web interface with three tabs: "Number Information", "Number History", and "Number Audit". The "Number History" tab is selected. Below the tabs, there is a field labeled "Number" with the value "1713674567". Below this, there is a section titled "Number History" with the message "No number history information found."

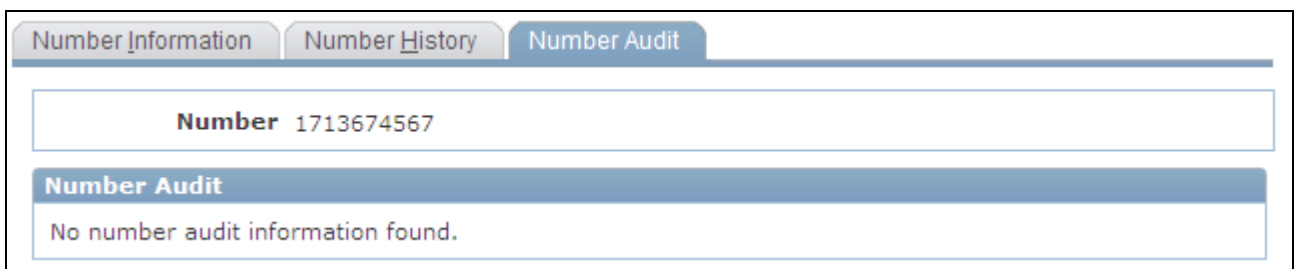
Number History page

The Number History page displays:

- When the number is created.
- When the number is made available.
- When the number is assigned to a customer.
- When the number is reserved for a customer.
- When a number is set to aging.
- When a number is ported-out or ported-in.

Viewing Number Audit Information

Access the Number Audit page (Number Management, Search Number, Number Audit).



The screenshot shows a web interface with three tabs: "Number Information", "Number History", and "Number Audit". The "Number Audit" tab is selected. Below the tabs, there is a field labeled "Number" with the value "1713674567". Below this, there is a section titled "Number Audit" with the message "No number audit information found."

Number Audit page

The Number Audit page provides an audit trail for the number history.

Assigning Numbers

Number assignment takes place during the order-capture process.

For example, a customer in the communications industry calls to order a digital wireless package. During the order-capture process, the CSR enters the *Digital Wireless* product on the order line. When the detailed order line is displayed, the CSR clicks the Attributes button to display a list of available numbers. The available numbers are attributes of the product.

See Also

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Using Order Capture and Service Management in the Communications Industry"

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Pages Used to Assign Numbers

Page Name	Definition Name	Navigation	Usage
Order - Entry Form	RO_FORM	Orders and Quotes, Add Order, Order - Entry Form	Enter a customer order.
View Attributes	RO_ATTR_RUN_SEC	Click the View Attributes button on the Order - Entry Form page.	The system displays a block of available numbers. These numbers all have the status of <i>Blocked</i> , so they are not available to other CSRs for assignment. One number is selected, and the status for that number is <i>Pending Activation</i> . The other numbers in the block are returned to <i>Available</i> status.

Chapter 4

Working with Subscriber Identity Modules (SIM)

This chapter provides an overview and discusses how to:

- Import SIM .
- Manage SIM.

Understanding SIM

A SIM is the device that carries the subscriber information for a set of services owned by a subscriber. A SIM card can be inserted into any GSM phone or device (laptop, Blackberry, and so on) to enable the services and billing for that subscriber. A SIM card is about 1 inch by 1 inch square and about 2 millimeters thick.

To support 3G services, CRM enables you to manage the inventory of SIM cards and the services that are contained of each SIM Card. A SIM card can contain one or more services and a service plan can span more than one SIM card, for example a Family Talk Share Plan. SIM cards can be either pre-provisioned with services or post-provisioned.

You can import in a batch of SIM cards. For the SIM cards that are imported in, some of them will be pre-provisioned with services and actual phone numbers.

Generally SIM cards sold through the Call Center have dummy number. Actual phone number are assigned during the Order Process. The non pre-provisioned SIMs will not have any numbers assigned. Phone numbers will be assigned during the order process and the SIM information will be updated with the assigned numbers.

Before SIM Cards can be used by CRM, they must be created in the CRM system. The most common way that SIM cards will be created in the CRM system is via a batch import process.

The SIM import will handle the following:

- SIM properties such as ICCID, IMSI, PUK1, PUK2, PIN1 and PIN2.
- Preprovisioned and non-preprovisioned SIMs.
- Preprovisioned SIMs with or without actual phone numbers assigned.
- Action for the specified SIM such as *Add*, *Delete*, and *Update*.

Importing SIM Inventory

The SIM import process is similar to the number import.

To manage SIM imports, use the Manage SIM Imports (RBT_MANAGE_SIM_IMP) and Import SIM (RBT_SIM_IMPORT_CMP) components.

Using a Flat File to Import SIM Inventory

This table illustrates the structure for the SIM Import input file.

Header	Example 1	Example 2
ICCID	86321282272298700000	23323222323223200000
IMSI	873238922221	987338922224
PIN1	2376	2372
PIN2	3645	3645
PUK1	6586	7094
PUK2	1234	7676
Used by Prepaid	Y	N
PREPROVISIONED	Y	N
VOICE AREA CODE	925	
VOICE NUMBER	6949000	
FAX AREA CODE	925	
FAX NUMBER	6949001	
DATA AREA CODE	925	
DATA NUMBER	6949002	
ACTION	Add	Add

Page Used to Import SIM Inventory

Page Name	Definition Name	Navigation	Usage
Import SIM	RBT_SIM_IMPORT_PG	Number Management, Import SIM, Import SIM	Import SIM inventory in a flat file.

Importing SIM Inventory

Access the Import SIM page (Number Management, Import SIM, Import SIM).

Import SIM

▼ **Attach Your Spreadsheet**

File Name Header lines to skip

▼ **Run the Import**

The amount of time it takes to run the Import varies according to the size of the import file. For very large files, the process could take several minutes.

[Process Monitor](#)

Import history

User ID VP1	Imported Date Time
--------------------	---------------------------

Import SIM page

Add Click the Add button to add the uploaded file.

Run Import Click the Run Import button to save the entered information, assign a default run control ID, and run a batch job to import the numbers.

Managing SIM

Administrators can search for SIM cards based on the ICCID, the IMSI, and the numbers that are provisioned on the SIM Card.

To manage SIM, use the Manage SIM (RBT_MANAGE_SIM) component.

Page Used to Manage SIM

Page Name	Definition Name	Navigation	Usage
Manage SIM	RBT_SIM_HDR	Number Management, Search SIM, Manage SIM	View details on the services that are provisioned on the SIM card and the phone number associated with the service. If the SIM is already Active it shows the corresponding Installed Service.

Managing SIM

Access the Manage SIM page (Number Management, Search SIM, Manage SIM).

Manage SIM

ICCID 87556786328878987811
 IMSI 187393889222291

SIM Details

PIN1 2376
 PIN2 3645

PUK1 6586
 PUK2 1234

☒ **Pre-Provisioned**
☒ **Prepaid offering**

Status Available

Related Phone Numbers

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-3 of 3](#) | [Last](#)

Area Code	Subscriber Number	Usage	Number Status
925	6941000	Voice	Available
925	6941048	Fax	Available
925	6941097	Data	Available

Modified 02/01/2006 11:35AM PST CSPADMIN

* Required Field

Manage SIM page

For each SIM card, CRM stores the services that are provisioned on the SIM card and the phone number associated with the service. The administrator cannot modify the status of the SIM. It gets updated based on the business processes.

If a service is disconnected, the status of the SIM changes to *Retired*. If the services are activated on a SIM, then the status of the SIM changes to *Active*. Once the SIM card is imported, it has a status of *Available*.

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