

IBM Cúram Social Program Management



Cúram Integrated ERP Operations Guide

Version 6.05

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Note

Before using this information and the product it supports, read the information in "Notices" on page 11

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This edition applies to IBM Cúram Social Program Management v6.0 5 and to all subsequent releases unless otherwise indicated in new editions.

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Chapter 1. Introduction

1.1 Cúram Integrated ERP Operations Guide

This guide describes the areas that should be configured in an integrated Cúram-ERP Financial environment.

It is a prerequisite that the reader is knowledgeable about the Cúram development environment and knows how to develop and build a Cúram application.

This guide does not contain any information regarding the installation and configuration of the ERP system.

1.2 Configuration

There are two key parts to the configuration. The first is the common configuration data which must be synchronized between the Cúram and ERP systems. The second covers the configuration of the Cúram Financial Adapter and the Cúram Master Data Adapter and the configuration of Cúram to use these adapters where needed. This is accomplished via the use of administration properties.

This deployment diagram shows the interaction points between Cúram and the ERP system that the configuration needs to support.

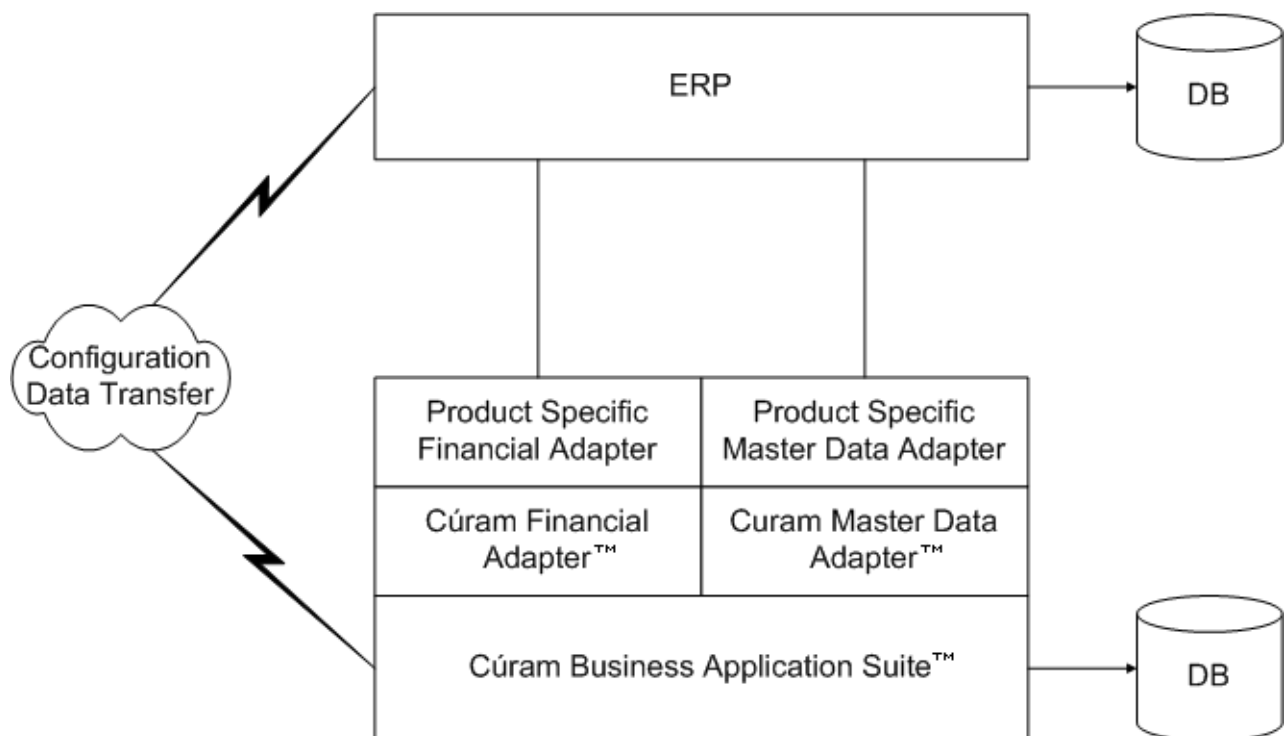


Figure 1. Generic deployment of an integrated Cúram ERP environment

Chapter 2. Configuration

2.1 Introduction

There are a number of categories of common configuration data which must be synchronized between the Cúram and ERP systems.

2.2 Common Configuration Data

The following data needs to be shared between Cúram and the ERP system to support an integrated Cúram-ERP financial environment. All items in the following list are required on both systems and may have to be synchronized manually:

Address Formats

Cúram supports a customizable address format. If an custom address format is used, the mapping between Cúram address fields and the corresponding ERP fields will need to be configured.

Banks and Bank Branches

This information is important for Cúram to enable users to capture and maintain bank accounts for participants. The ERP financial system needs this information in order to issue payments by EFT to clients.

Codetables

Not all Cúram codetables need to be shared with the ERP system, only those which contain data shared in the technical interfaces.

Currencies

The same default currency must be used for both systems and the same list of currencies must be available to both.

Delivery Methods

This information is important for Cúram to enable users to capture and maintain delivery information for participants. The ERP financial system needs this information in order to issue payments to clients.

Chapter 3. Administration Properties

3.1 Introduction

This chapter describes the administration properties that have been added to Cúram to support the configuration of an integrated Cúram-ERP financial environment. These properties can be used to control the behavior of the ERP financial and master data adapters themselves and the configuration of Cúram to use these adapters where needed.

Note: For more information on the Properties Administration area of the Cúram Administration Client, see the Cúram Operations guide.

3.2 Dynamic Properties

These properties can be changed at runtime via the property administration section.

The following dynamic properties have been added to support the configuration of an integrated Cúram-ERP financial environment:

curam.internalmdadapter.trace.exchangeprogress

This property controls whether or not trace information is produced by the Cúram master data adapter.

curam.externalmdadapter.trace.exchangeprogress

This property controls whether or not trace information is produced by the external master data adapter.

curam.internalfinancialadapter.trace.exchangeprogress

This property controls whether or not trace information is produced by the Cúram Financial adapter.

curam.externalfinancialadapter.trace.exchangeprogress

This property controls whether or not trace information is produced by the external financial adapter.

curam.internalmdadapter.trace.exchangeprogress

This property specifies the amount of time in milliseconds before re-polling an exchange table.

curam.financialadapter.maxpollingretryattempts

The number of database table polling retry attempts allowed before failing.

3.3 Static Properties

These properties can be changed via the property administration section, but the changes will not take effect until the servers are re-started.

The following static properties have been added to support the configuration of an integrated Cúram-ERP financial environment:

curam.erp.masterdataadapter.enabled

This property indicates that the master data adapter is enabled. This controls whether or not Cúram attempts to broadcast master data to the external systems. This property should be set to "YES" in an integrated Cúram-ERP financial environment.

curam.erp.financialadapter.enabled

This property indicates that the Financial adapter is enabled. This controls whether or not Cúram

attempts to broadcast financial data to the external systems. This property should be set to “YES” in an integrated Cúram-ERP financial environment.

curam.erp.internalAdapter.masterdataregistrar

This property contains the name of the internal master data adapter registrar to be invoked when broadcasting master data to the external systems.

curam.erp.internalAdapter.financialregistrar

This property contains the name of the internal Financial adapter registrar to be invoked when broadcasting financial data to the external systems.

curam.erp.externalAdapter.registrars

This property contains the names of all the external, product specific adapter registrars on the system.

curam.externaltaxauthority.enabled

This property indicates whether or not the tax authority is an external organization. It is used to control the transfer of “Tax Payment” instruction line items from Cúram to the ERP financial system.

Chapter 4. Codetables

4.1 Introduction

There are a number of codetables which need to be synchronized on both systems. The Cúram codetable values should be mapped onto equivalent codes in the ERP system.

Note: Codetable hierarchies are supported in Cúram and may need to be considered when mapping the Cúram codetable values to their ERP counterparts.

4.1.1 ConcernRoleType

This codetable lists all of the participant types, i.e. concern roles, that can be registered in the Cúram system. Examples include “Person” and “Employer”.

4.1.2 ConcernRoleAlternateID

This codetable lists all forms of identification supported by the Cúram system. These will vary depending on a customer's implementation, but examples include “Social Security Number” and “Passport Number”.

4.1.3 Gender

This codetable contains the values used to represent “Male” and “Female” in the Cúram system.

4.1.4 PersonTitle

This codetable lists all of the titles that are supported by the Cúram system. These will vary depending on a customer's implementation, but examples include “Mr.” and “Dr.”.

4.1.5 Country

This codetable lists all of the countries supported by the Cúram system. Examples include “Ireland” and “Germany”.

4.1.6 Language

This codetable lists all of the languages supported by the Cúram system. Examples include “English” and “French”.

4.1.7 BankAccountType

This codetable lists all of the bank account types that are supported by the Cúram system. These will vary depending on a customer's implementation, but examples include “Personal Current” and “Corporate Deposit”.

4.1.8 ILICategory

This codetable lists all of the instruction line item categories that are supported by the Cúram system. Examples include “Payment Instruction” and “Liability Instruction”.

4.1.9 ILIType

This codetable lists all of the instruction line item types that can be generated by the Cúram system. These will vary depending on a customer's implementation, but examples include “Deduction Item” and “Tax Payment”.

4.1.10 MethodOfDelivery

This codetable lists all of the delivery methods supported by the Cúram system. The relevant method of delivery is recorded on any instruction line items generated by the Cúram financial process. Examples include "Cash" and "EFT".

4.1.11 Currency

This codetable lists all of the currencies supported by the Cúram system. The relevant currency is recorded on any instruction line item generated by a Cúram financial process. Examples include "US Dollar" and "Euro".

Chapter 5. Batch Processing

5.1 Introduction

The following batch processes have been disabled in the Cúram system. This functionality should be provided by the integrated ERP financial system:

- Generate Instruments
- Generate Payslips
- Issue Concern Payments
- Load Payments Received
- Process Payment Instrument Types
- Expire Payments

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