# TRAINING MANUAL

## KORE Wireless
## UI/UX Update and Keycloak Security

VERSION 1.0.0.0

# About Manual

This document is intended to guide users through the changes in AMS and provide a resource to reference when questions arise. There have been minor adjustments made to the user workflows, user interface modifications to improve the look and feel, and enhanced security through Keycloak.

The following information will be detailed in the document:

- Keycloak Registration and AMS Login
- Switching Organizations
- Viewing Orders
- Order Creation
    - Create a Deployment Order
    - Create a Service Exchange Order
    - Create a Transfer Order
- Bulk Upload

# Contents

# Change Log

| Version | Author | Date | Description of changes |
|---------|--------|------|------------------------|
| 1.0.0.0 | Abriti Das | 05/25/2023 | Initial version of file |
| | | | |
| | | | |
| | | | |

# Glossary

These are terms that will be used further in the document to describe the system.

| | |
|---|---|
| **Orders** | A request for movement of one or more assets from one place to another. |
| **Parts** | Specific part type with a specific location that is associated to an order. |
| **Boxes** | The main component of orders, boxes can be filled with boxes, parts or a combination of both. |
| **Deployment Order** | A request to move one or more assets from a warehouse to a client. |
| **Return Order** | A request to return one or more assets from a client to a warehouse. |
| **Assets** | A specific part that has been given a serial number associated to it. An asset can either be in a warehouse, with a client, or as part of another asset in the case of assets dependent on each other (such as a sim card in a device). |
| **Clients** | An individual associated with a specific customer. An individual can be represented as more than one client if they are part of more than one customer. |
| **Inventory** | A non-serialized item that we have in our stock. This can be used to show the stock of items in our system available for deployment for a potential order. |
| **Order by ID** | Request to retrieve order by providing the order id. |
| **AMS** | Asset Management System. An application used to manage orders and inventory. |
| **Keycloak** | A third-party service integrated with our AMS application to create a more secure layer of protection for the user. |

# INTRODUCTION

Users are required to the log into the updated AMS application using https://ams.korewireless.com/. The screen displayed is the AMS login screen (Figure 1), by entering an email and clicking *'Log In'* a redirect to Keycloak's interface will occur.
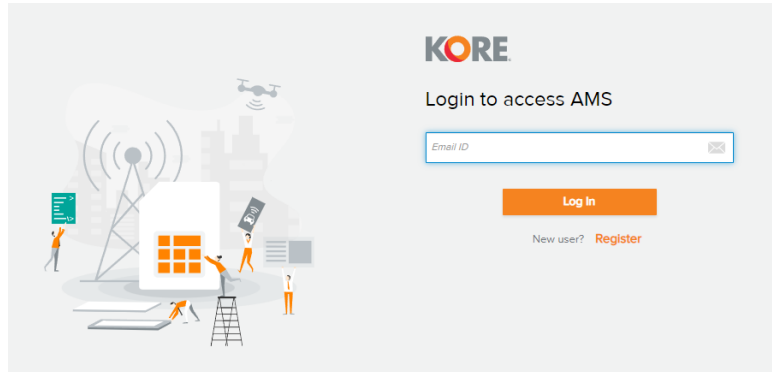


*Figure 1*

## KEYCLOAK REGISTRATION

When accessing the updated AMS application users will be redirected to a Keycloak login screen (Figure 2). This screen can be used to login or register. If a user has not registered before, then they need to click the blue register text below the login button. Follow the guided instructions provided after clicking the register text to complete registration with Keycloak (Figure 3). *When registering it is important to provide the email used to communicate with KORE to ensure our KORE systems and Keycloak's system have the same user information or AMS access will not be possible until corrected*. This email should be the same email used when accessing KORE systems such as the current version of AMS.
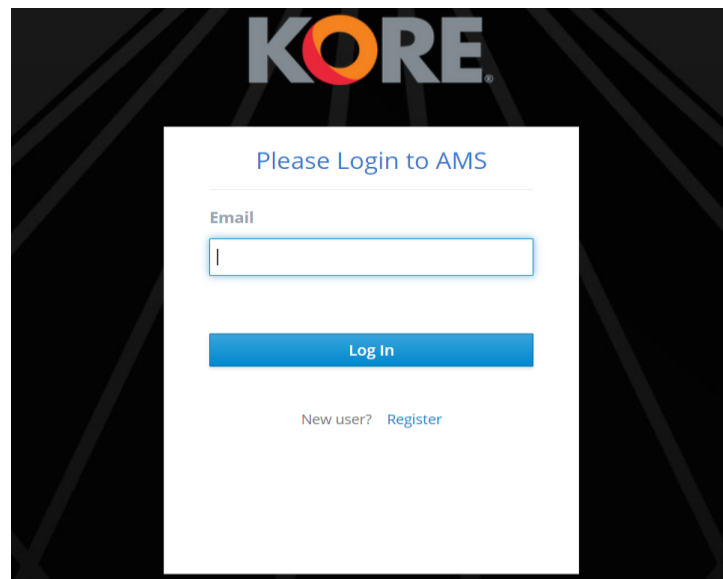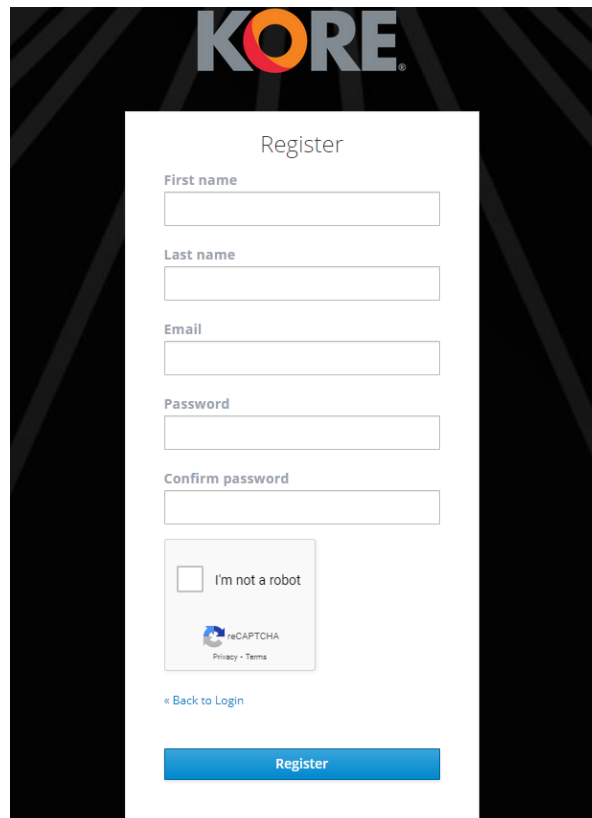


*Figure 2*

**Locate Valid Email Address**

1. Users can go to the WMS application and based on admin privileges, they can check for a username and corresponding email address, or they can contact their supervisor.
2. Contact the CSO team to find their email address.
3. Contact IoTSupport_int@korewireless.com and request your AMS email.

**Email Specifications**

- The email address used to register should be valid, accessible and can send and receive emails since Keycloak will send verifications to the email address for authentication into AMS.
- If an email address is invalid in WMS, update the email address in WMS itself with a valid or new one.



*Figure 3*

## AMS LOGIN

Once registered, users can login using their registered email address which will redirect them to the One Login page (Figure 5). Users can enter their valid username and password to receive a token generated by Keycloak. This token exists in Keycloak's system (Figure 4) and does not have to be interacted with by the user, this is simply information to detail how the login functionality works. The token will be valid for 10 hours unless the browser is closed. After which users are required to login again.
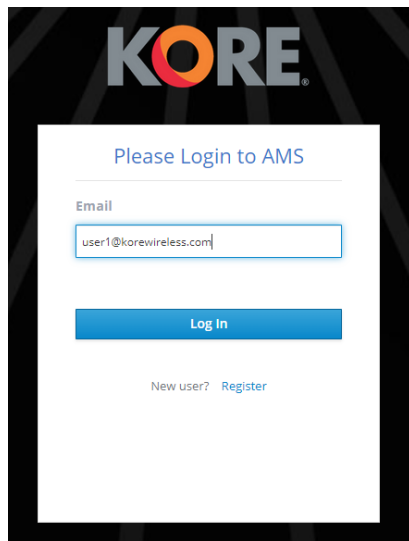


*Figure 4*
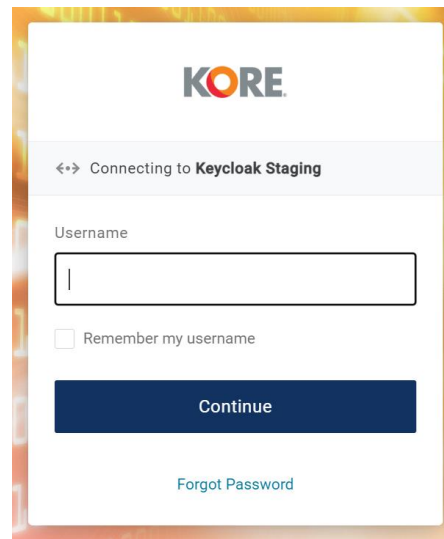


*Figure 5*

# Switch Organization

The management of organizations associated with a user is different for the updated AMS application. Previously KORE users had a username and password to access each organization they belong to. In this updated version there will not be multiple usernames and passwords, only one username and password. The email registered with Keycloak will act as a single username to access all organizations. Once a user is logged into AMS there is a new feature called switch organization (Figure 6) that functions as a way to change the application data to the different organization selected without needing to logout and login with a different username and password. A user will only see additional organizations if they belong to more than one organization. To access this feature, click the profile icon in the top right corner to locate the '*Switch Organization'* button and select the organization to change to. The pop-up provided after clicking the *'Switch Organization'* button will also have a default user option to change the organization a user is logged into AMS as. The default user will ensure the organization marked as default will be the data shown when logging into AMS.
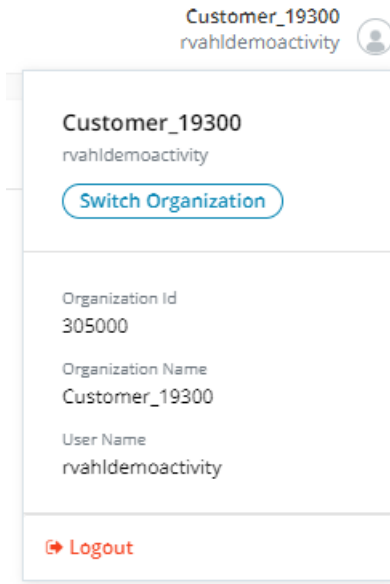
*Figure 6*

## SWITCH ORGANIZATION

Users can switch between different organizations/users using the 'Switch organization' icon under the Actions column. A pop-up window will appear to confirm.
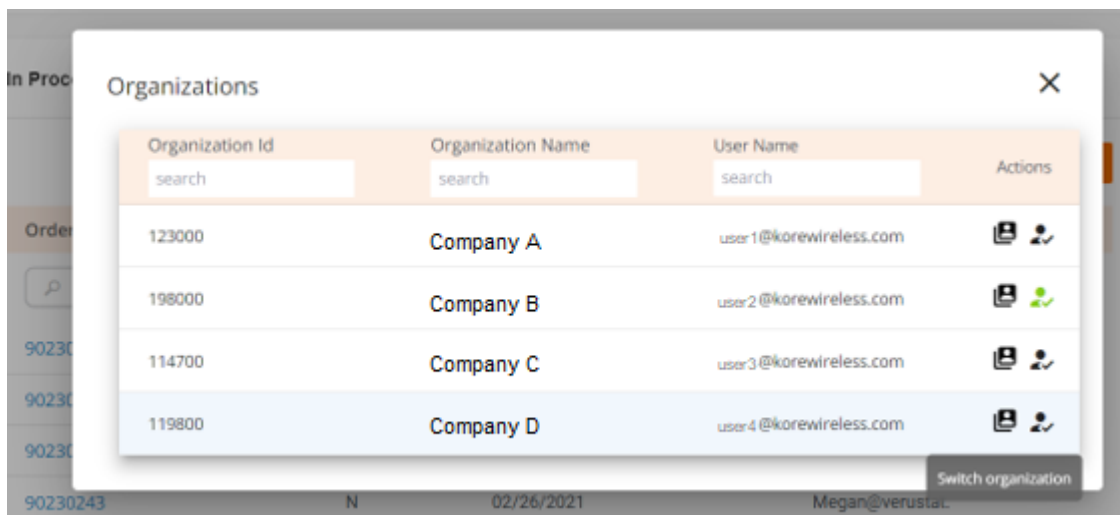


*Figure 7*
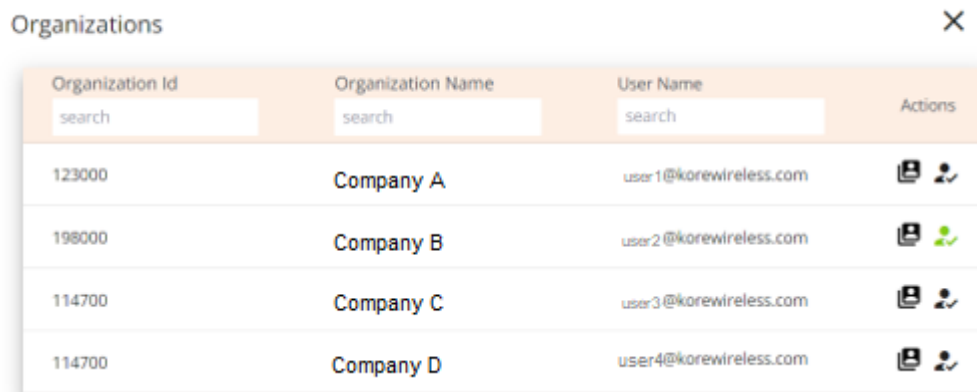
After switching an organization, the changed username and organization will appear in the profile section on top right corner. AMS will be populated with data belonging to the selected organization.

For example, now the user will view the data for user (Company D | user4@korewireless.com).

## DEFAULT USER

By default, when a user logs into AMS and has multiple usernames from the previous AMS version, the username with the lowest Organization ID (first column in pop-up) will be selected as default.

For example, in this case the Organization ID with the lowest value is (Company C | user3@korewireless.com), so that will be set as default user and appear in green icon.



*Figure 8*

The user however can change/set the default user if they want to login with a particular username. To set the default user to a different username, users can select '*set as default*' icon (image with two squares) under the Actions column. A pop-up window will appear to confirm.
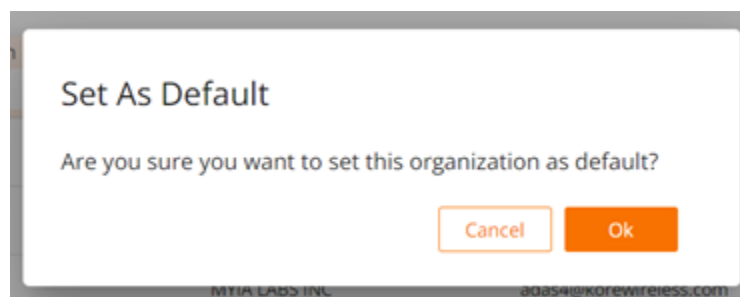


*Figure 9*

Once done, a confirmation message will appear, and users can check the default user set in Switch Organization under the profile section. Also, the change in default user will persist for all future logins unless changed again, in this case, (Company B | user2@korewireless.com) will be the username when AMS is logged into again.

*Figure 10*

# APPLICATION OVERVIEW

Once the user logs in, on the left navigation menu, users can access the following:

- Home
- Orders
- Bulk Import
- Pending Orders
- Assets
- Clients
- Inventory
- Change Log

The current active tab will be highlighted in black on the left navigation menu.



*Figure 11*

# HOME

Once the user logs into the new AMS application, it will populate the home screen showing the in-process E-Orders (There are no in-process orders for a demo account).



*Figure 12*

Users can also create a new order using the plus button on top right, which will redirect to Deployment Order screen.
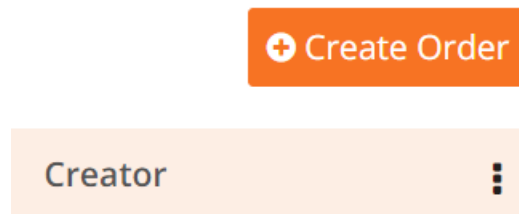


*Figure 13*
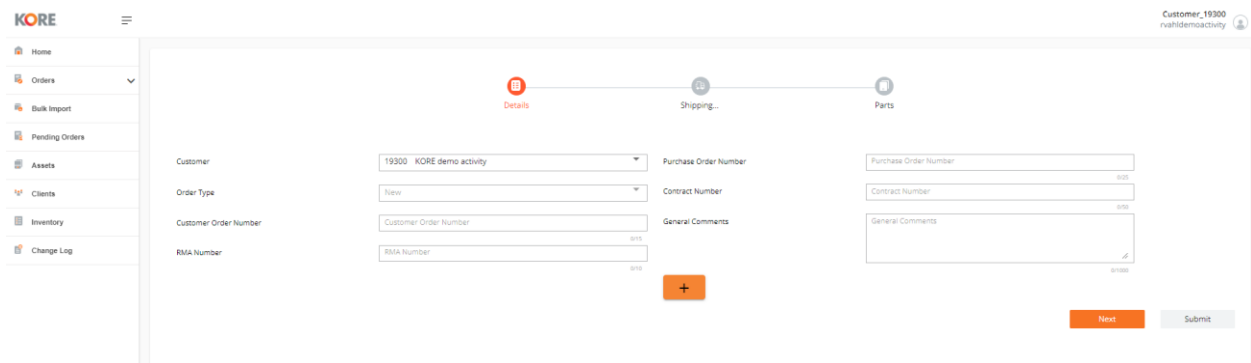


*Figure 14*

# ORDERS

Next menu item is Orders.

Within the Orders we have

  ➢ View Orders
  ➢ Deployment Order
  ➢ Service Exchange and
  ➢ Transfer Order

# VIEW ORDERS

All orders will be listed here. Filter available for all columns and can be filtered with status as well. We have quick filters to see *Historical* and *In Progress* orders.

*Figure 15*

**Grid Features**

  • Clear filters
  • Sorting
  • Export
  • And more through the 3 dots symbol beside the column "Details"

*Figure 16*

Upon clicking + symbol within Details, it opens a pop-up providing Order details such as Customer number, Order details, Shipping information etc.



*Figure 17*

# DEPLOYMENT ORDER

This is a workflow to create a new order.  Deployment order has three sections.

- Detail section – contains primary information of an order.
- Shipping information – Shipment information
- Select parts – To select parts and client (manually or by QA)

## DETAILS

The primary order information is required to be filled in. Users will be asked to fill in any missing information before they can submit.



*Figure 18*

## SHIPPING INFORMATION

The shipping information is to be filled.



*Figure 19*

The address selection can be made using previously saved addresses.

*Figure 20*

Date Needed Onsite and Carrier can be selected manually. The carrier availability depends on the address selection (zip code) selection.



*Figure 21*

## PARTS

This is the final section of the deployment order.  There are 2 options to select parts.

1.  Select by Parts and Clients
2.  Select Parts by QA

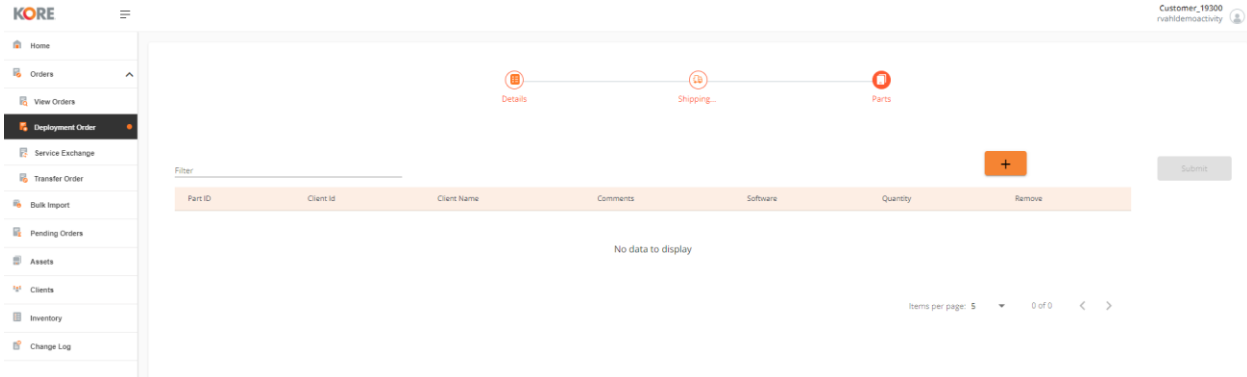Users can choose any of it using the add buttons at top right.



*Figure 22*

## Select Parts and Clients

Here the user can select the client and then parts and review the parts selection before adding to the order.
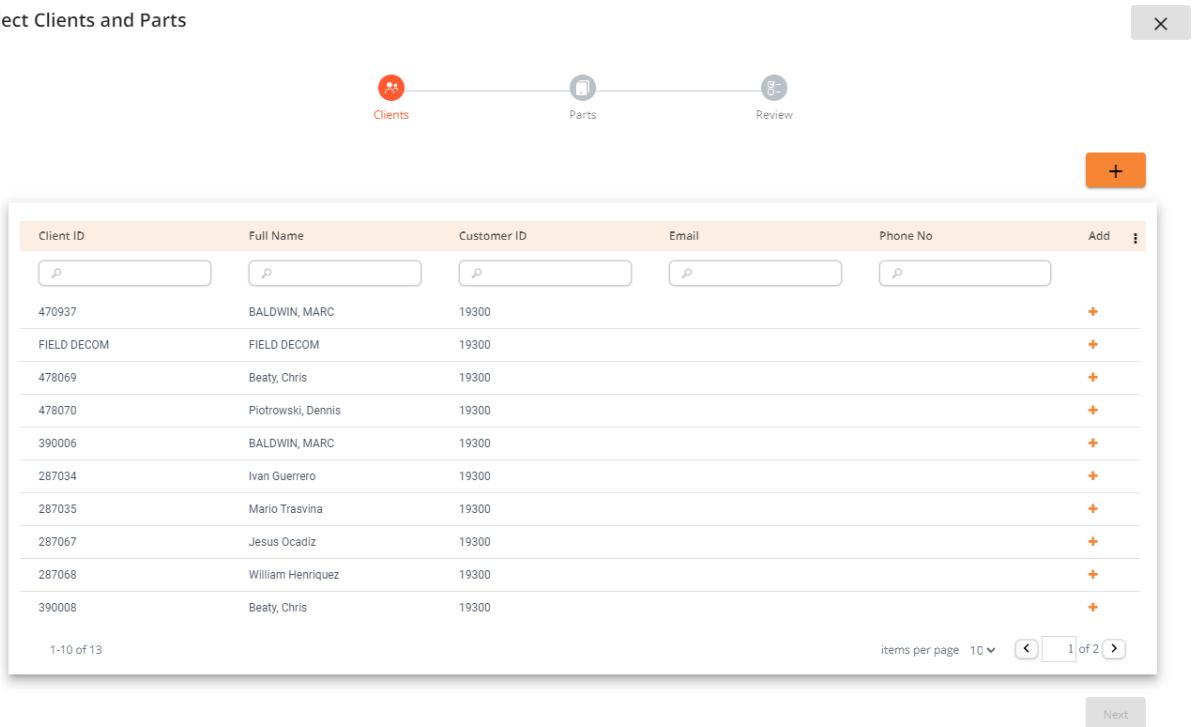


*Figure 23*

Also, the user has an option to add new clients using the plus button at the top right. The client ID will be validated against the existing client IDs in the database. Same client ID will be allowed to add.
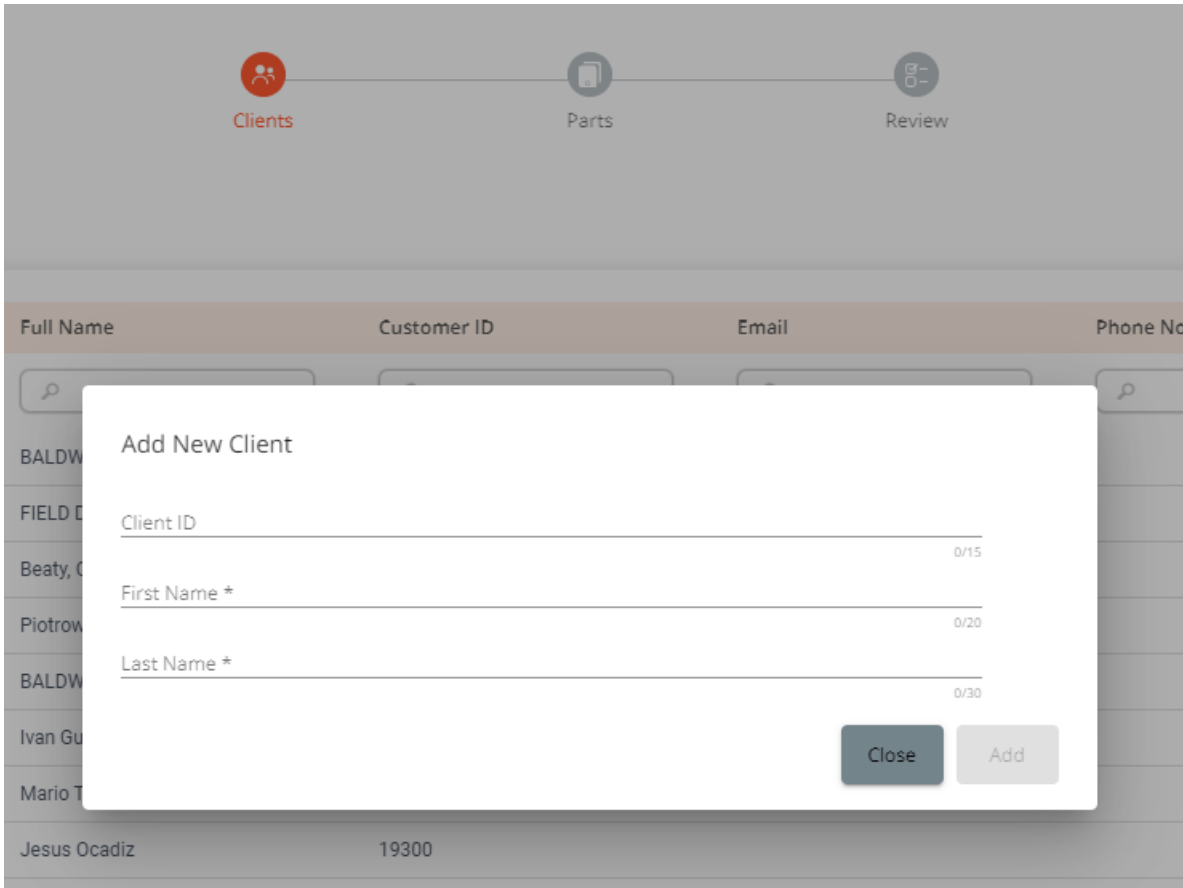


*Figure 24*



*Figure 25*

Once the client is selected, the next step is to add the parts. Parts can be selected using the + button against each part.

*Figure 26*

Then review the selection and update the order with the selected part(s)
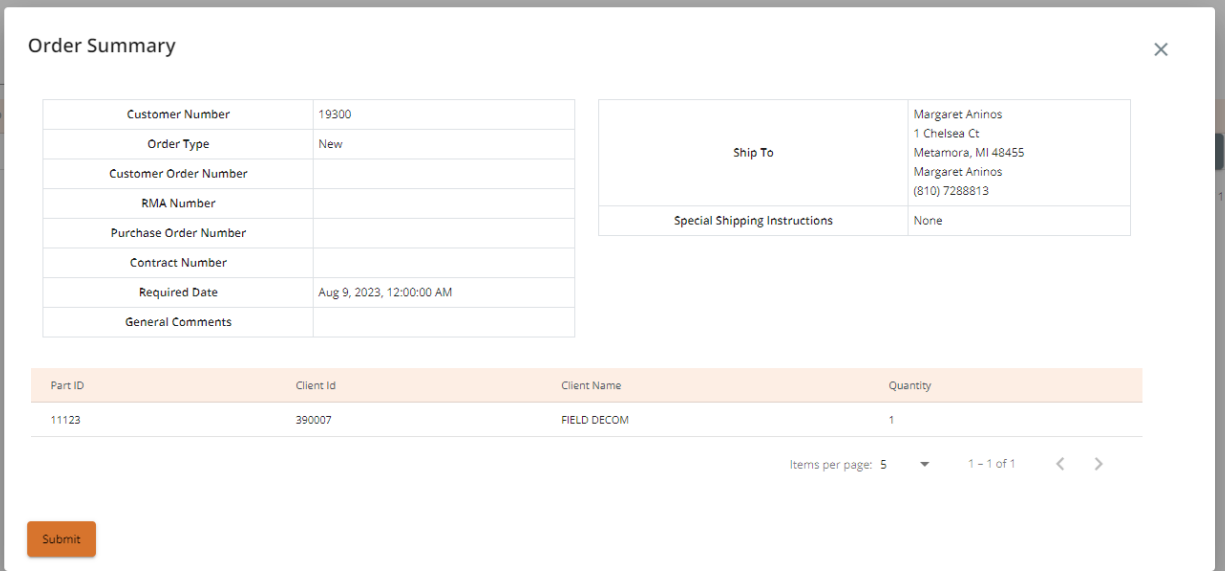


*Figure 27*

## SUBMIT DEPLOYMENT ORDER

Once the deployment order data is filled, users can review the order before submitting.



*Figure 28*

During submission, if there are any back-end validations the user will be notified. If the back-end validation is successful, the Order will be submitted successfully.

# SERVICE EXCHANGE

The exchange for an order can be done through Service Exchange.

Service Exchange has three sections:

- Select Assets
- Select Exchange for each asset selected in step 1
- Review and submit

## Select Assets

The user can select multiple assets eligible for exchange.

In the below example two assets have been selected hence a section has been added dynamically for both assets (Orders-1 and Orders-2)
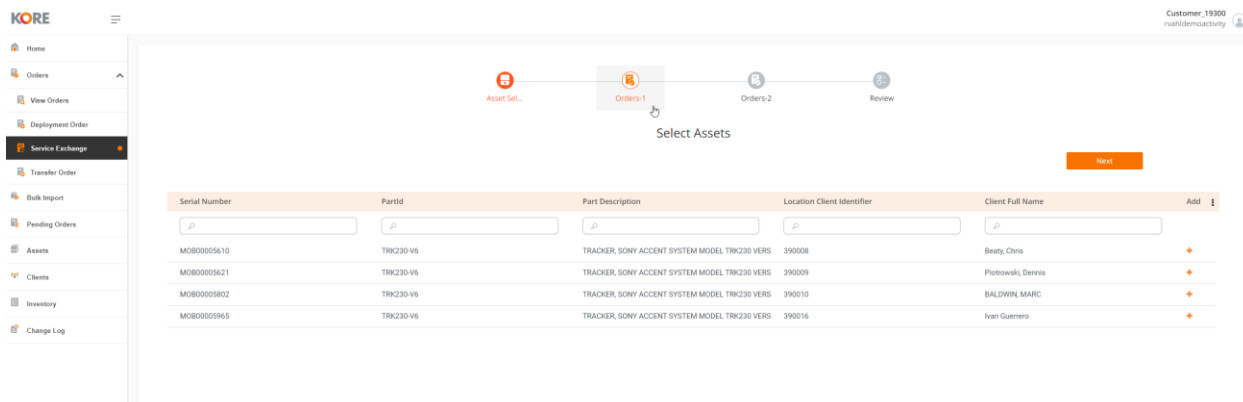


*Figure 29*

## Parts selection

Now user can see the selected asset and find the new parts to receive, below screenshot shows Orders-1. Users can search for parts on this screen.
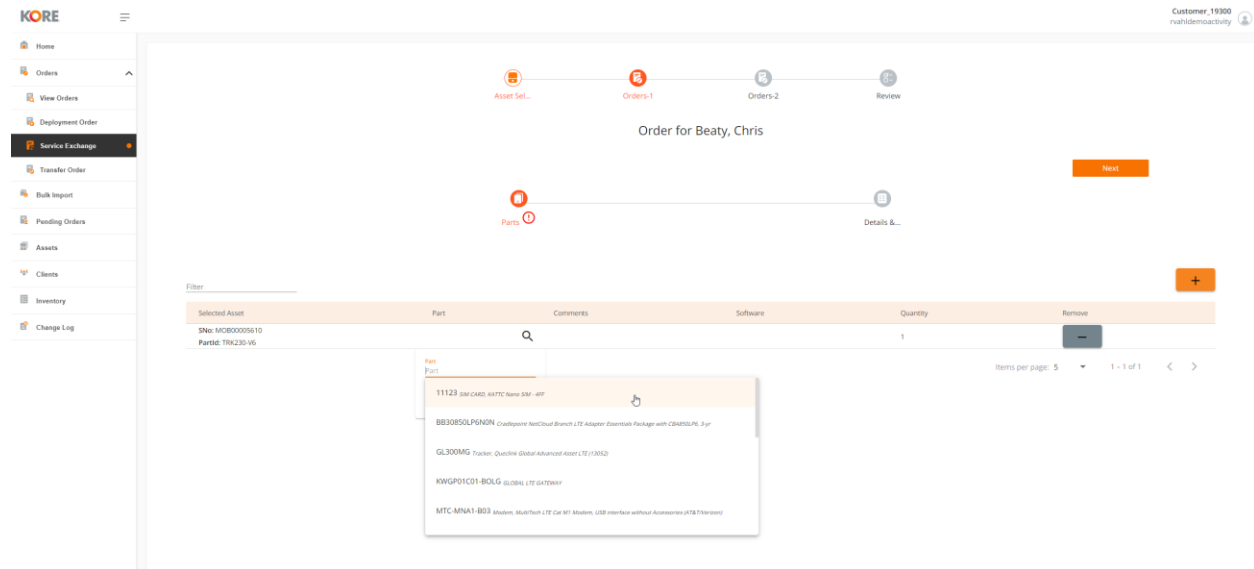


*Figure 30*

Once the part is filled, details and shipping information needs to be filled in like Deployment Order.

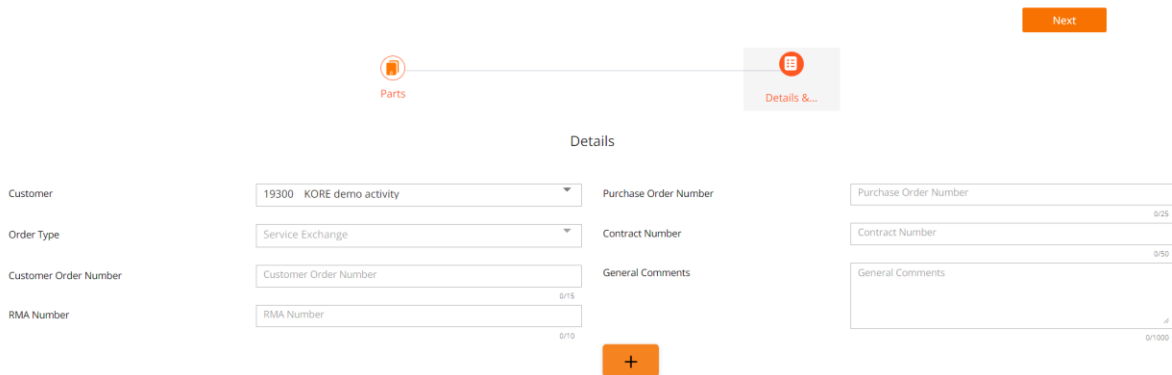The shipping information section can be seen below the details section.



*Figure 31*

## Shipping Information

| | | | |
|---|---|---|---|
| Special Shipping Instructions | Special Shipping Instructions<br>0/80 | Choose Address | |
| Ship to Corporation Name | Ship to Corporation Name<br>Ship to Corporation Name is | Zip Code | Zip Code<br>Zip Code is required! |
| Country | Country<br>Country is required! | Date Needed On Site | Required date is required! |
| Street Address | Street Address<br>Street Address is required! | Attention To | AttentionTo<br>Attention To is required! |
| City | City<br>City is required! | Phone Number | Phone Number<br>Phone Number is required! |
| State | State<br>State is required! | Carrier | Carrier<br>Carrier is required! |

*Figure 32*

## Review Orders

The user can review all the Service Exchange orders and can edit or remove the orders.



*Figure 33*

Each order must be submitted individually (using the L shaped arrow against each order).

# TRANSFER ORDER

Transfer Order is about moving assets between clients.

First the client must be selected from whom the asset is to be transferred. Apply the + button to select one or more clients. For each client selected from this list, Orders screen will be created dynamically.
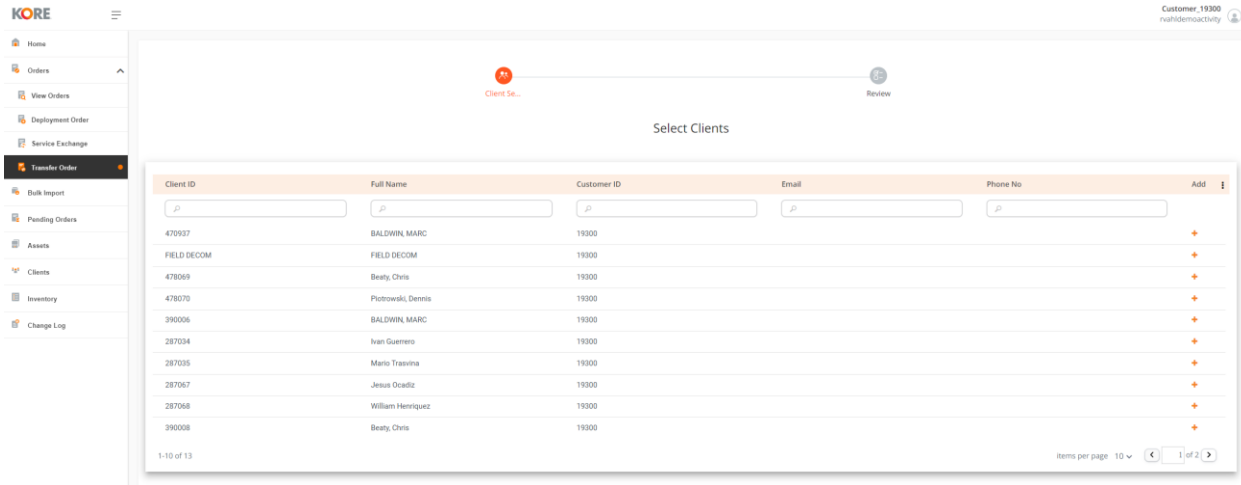


*Figure 34*

Suppose we have selected two clients; then two orders will be created. Orders-1 and Orders-2 for two clients.
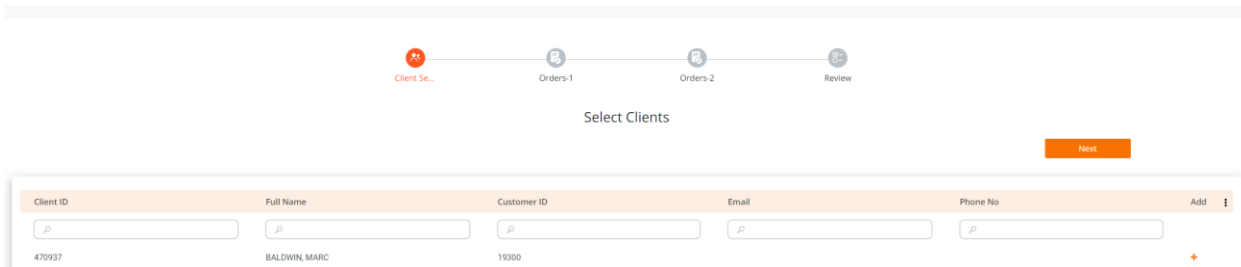


*Figure 35*

Navigate through each order and fill in the details. First select the asset(s) to be transferred.

Then select the destination client (Figure 36).

*Figure 36*

Next step is to fill out Shipping Information. It asks the user to choose if they require a Shipping Label.



Do you require a Shipping label?

| Yes | No |

*Figure 37*

By Default, the option will be set to 'No' and default shipping parameters will be considered. If 'Yes' option is selected, then the shipping details needs to be entered manually.

For example, we have selected 'Yes', so we need to enter shipping details and address manually as shown below.

25

*Figure 38*



*Figure 39*

Finally review and submit screen, where the user has the option to Edit / Delete / Submit the Transfer Order.



*Figure 40*

# BULK IMPORT

In the Import Bulk Order screen, users can import a file by using either '*Drop file here*' or '*Browse*' option.
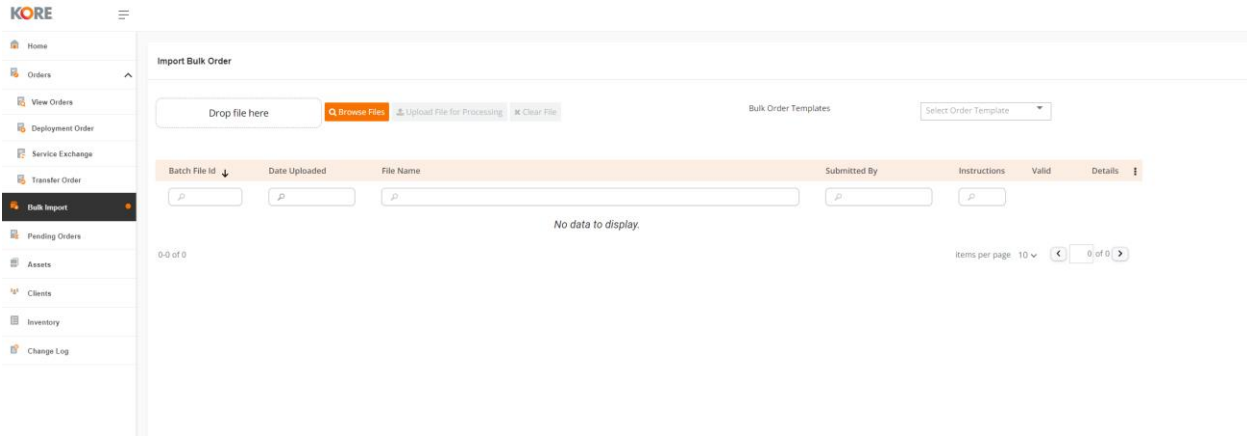


*Figure 41*

Once the file is selected, '*Upload file for processing*' and '*Clear File*' get enabled. Users can select the 'Upload file for processing' to process the file which was uploaded or 'Clear File', if the file selected is incorrect.
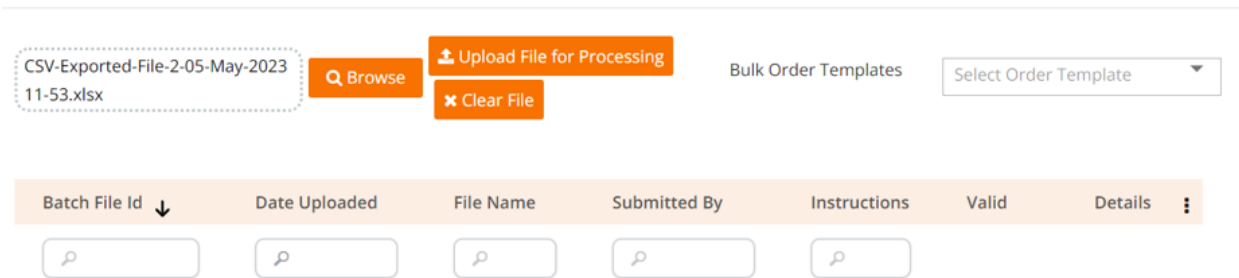


*Figure 42*

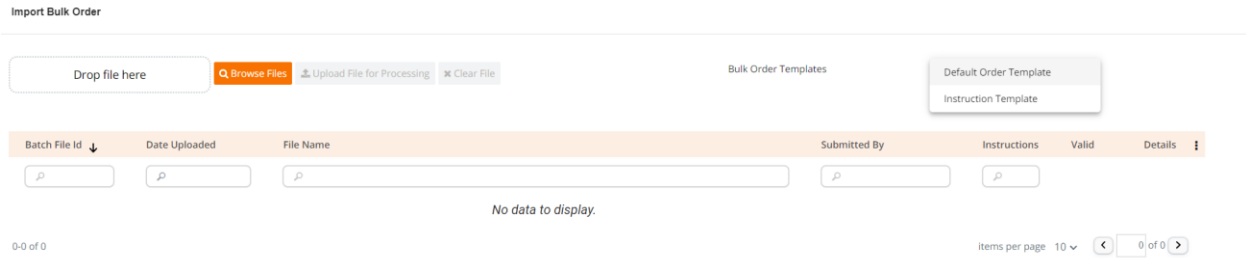Users also have the option to download the template.



*Figure 43*

# PENDING ORDERS

All pending order requests will be listed here. Search and filter functionality are available for each column. The grid menu is available to clear filters, sorting, export etc. Also, for each order, users can view details or remove the order.
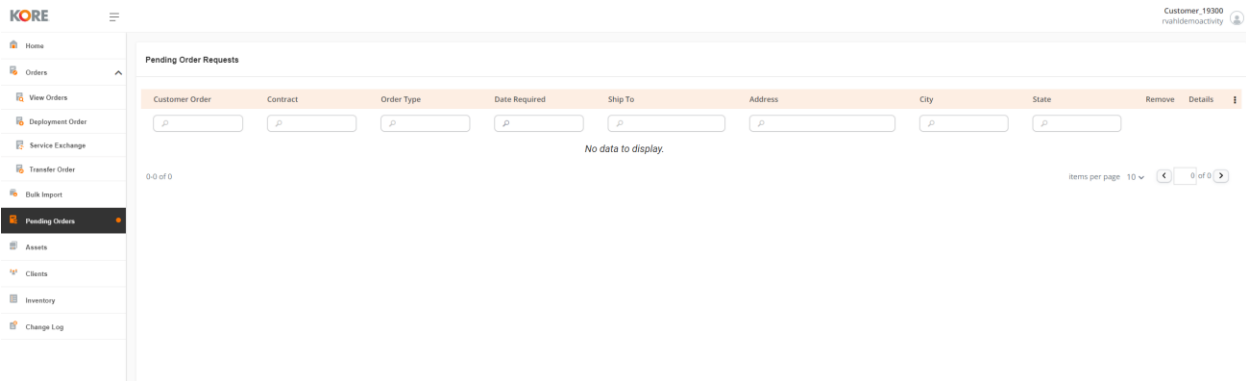


*Figure 44*

By clicking on the + sign details such as shipping information and parts about each order can be viewed.



*Figure 45*

# ASSETS

Asset Details can be viewed on this screen. Search and filter functionality are available for each column. The grid menu is available to clear filters, sorting, export etc.



*Figure 46*

By clicking on the + sign details regarding Assets, Part Information, Bill of Materials, Secondary Part Information as well as History about each asset can be viewed.

### Asset Details

#### Asset Details

| | |
|---|---|
| **Asset Number** | |
| **Serial Number** | MOB00005431 |
| **Part** | TRACKER, SONY ACCENT SYSTEM MODEL TRK230 VERSION 6 |
| **Secondary Part** | TRACKER, SONY ACCENT SYSTEM MODEL TRK230 VERSION 6 |
| **MAN Number** | 89011703278221015517 |
| **Current Location** | |
| **ESN** | 860536049434832 |

#### Part Information

Model TRACKER, SONY ACCENT SYSTEM MODEL TRK230 VERSION 6

Product Category Description

Stock UOMEA

*Figure 47*

**Asset Details**

Secondary Part Information

Model TRACKER, SONY ACCENT SYSTEM MODEL TRK230 VERSION 6
Product Category Description
Stock UOMEA

Bill of materials

| Part ID | Model | Quantity |
|---------|-------|----------|
| TRK230-V6 | TRK230V6CFG | 1 |

Items per page: 5 ⌄   1 – 1 of 1   ‹ ›

*Figure 48*

## Asset Details

Product Category Description
Stock UOMEA

Bill of materials

| Part ID |
|---------|
| TRK230-V6 |

History

**3/2/21 11:33 AM Receiving**
ICF: 369806
Comments: ()

**7/19/23 5:20 PM Receiving**
Return (TRK230-V6) ICF: 406634
Comments: ()

**7/19/23 5:20 PM Receiving**
Return (TRK230-V6) ICF: 406634
Comments: ()

**7/19/23 5:20 PM Receiving**
Return (TRK230-V6) ICF: 406634
Comments: ()

**7/19/23 5:20 PM Receiving**
Return (TRK230-V6) ICF: 406634
Comments: ()

*Figure 49*

# CLIENTS

Client information such as Client Name, Client ID, Customer ID can be viewed on this screen. Search and filter functionality are available for each column. The grid menu is available to clear filters, sorting, export etc.
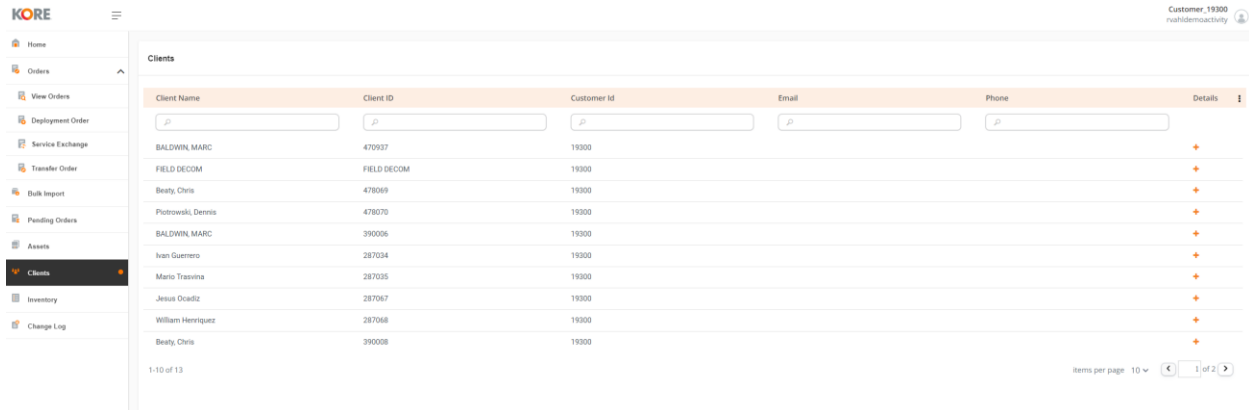


*Figure 50*

By clicking on the + sign details about Client, Current Assets and Order History are available.

**Client Details**
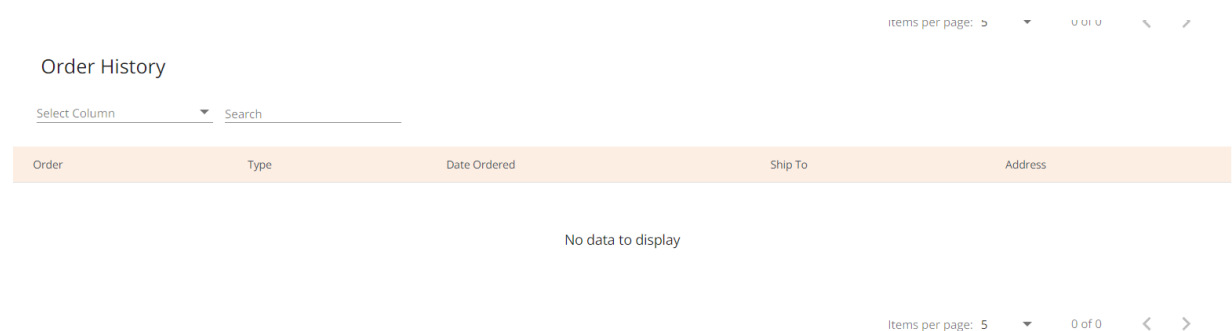


*Figure 51*



*Figure 52*

# INVENTORY

Inventory information such as Part ID, Model, Product, Warehouse etc. can be viewed on this screen. Search and filter functionality are available for each column. The grid menu is available to clear filters, sorting, export etc.



*Figure 53*

By clicking on the + sign details about Parts, Bill of Materials and Where Used are available.



*Figure 54*

# CHANGE LOG

Change log will provide historical information about *Version, Release Date* and *Customer Content.*
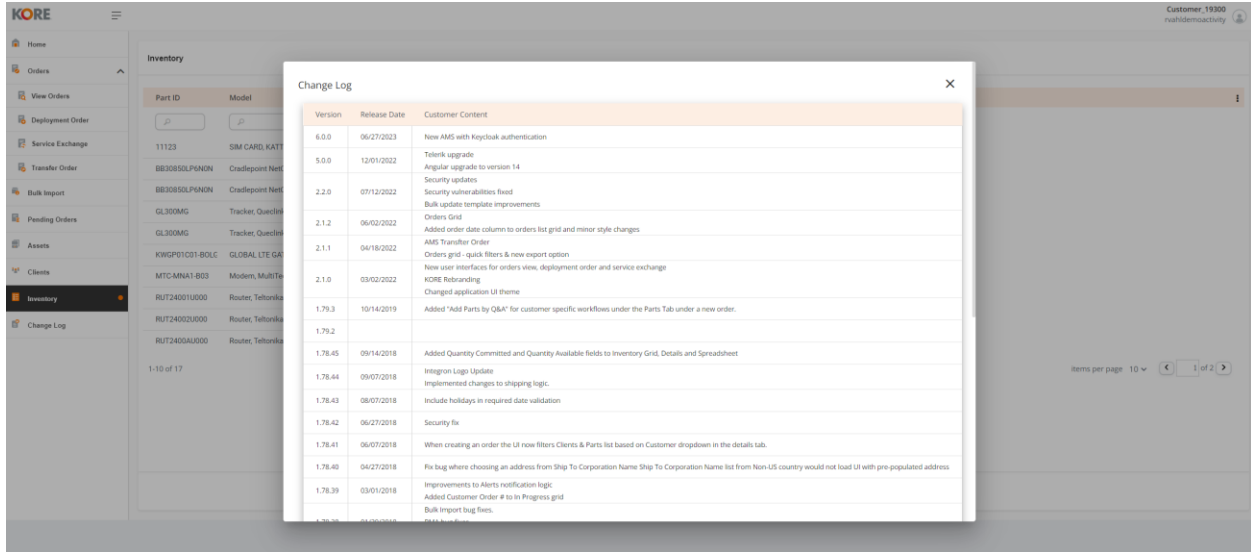


*Figure 55*