

Universal Order Connect (UOC)

User Guide

*Software Version 4.63
Document Version 1.21*

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UNIVERSAL ORDER CONNECT (UOC)

Universal Order Connect User Guide

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Acknowledgments

Release notes

The following release information applies to this version of the *Universal Order Connect User Guide*. This document is current until replaced.

Software Version	4.63
Document Name	<i>Universal_Order_Connect_User_Guide.pdf</i>
Document Version	1.21
Document Status	<i>Final</i>
Release Date	<i>November 2024</i>

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Document History

This table details changes made to the document during each revision:

Version/Date	Revision
May 2019	User Guide creation
Aug 2019	Updated the guide with universal catalog screens and other minor changes.
Nov 2019	Updated the guide with new login screen, response catalog, preferences and order enrichment management sub menu items and other minor changes.
Dec 2019	Added more content for Reports chapter and Create Order chapter.
Jan 2020	Updated the guide with correct heading levels.
Feb 2020	Updated the guide with task list management functionality and other minor edits.
Apr 2020	New chapter 11 added in the guide and other minor edits.
Oct 2020	Create Order and Existing Order chapters are merged in single chapter 3 Order. Also updated guide with UOC and other minor changes.
Dec 2020	Added details about Order Flag, Change Order, Disconnect Order and other minor edits.
Nov 2022	Update to include new Service Ability/Quote, API Work Queue, Preferences, Circuit Insights Modules, and to remove Service and Administrative Modules. Update existing remaining sections with additional functionality or changed functionality.
Nov 2023	<ul style="list-style-type: none">• Update main menu option from Bulk Order to Bulk Upload• Add Trouble Ticketing /Section 9
Mar 2024	Added Pre Order section
Nov 2024	Update Sub Status information in Trouble Ticket Section 9

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Chapter 1 Overview

Neustar’s Universal Order Connect is an application providing unified, simplified, and seamless user-oriented operations for:

- **Any order**
- **Any standard**
- **Any trading partner**

Delivered in the right format, to the right destination with complete transparency and accuracy.

How we simplify



Automated Data Translation & Enrichment
Orders are automatically translated into the proper format, with data fields auto-generated and pre-populated.



Product Catalog Support
Build each product specific to each order type using common ordering rules and naming conventions.



User-friendly Workflows
Automate and simplify complex business processes to reduce manual processes, errors and time requirements.



Automated SLAs
Automatically enforce SLAs and speed up ordering process, reduce errors, and protect margins.



Fully Automated Ordering
Support the new generation of connected services.



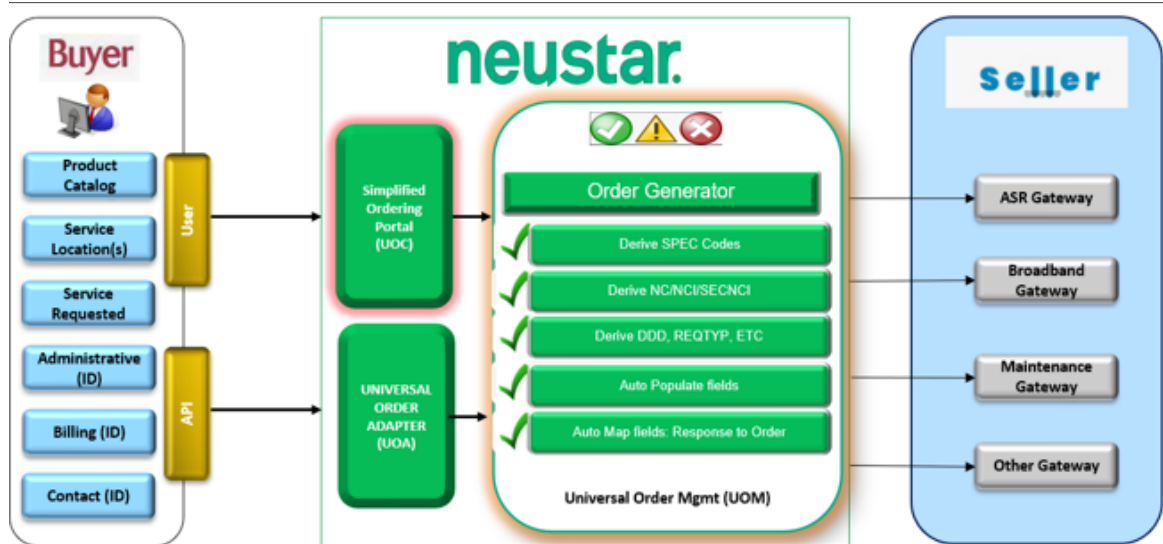
Industry Compliant
UOM supports ASOG, TMF, MEF and proprietary operator formats.

ANY ORDER ANY STANDARD ANY TRADING PARTNER

High Level Architecture

The following depicts the general architecture of how UOC works and where it resides.

This user guide supports the functionality associated to the UOC Portal portion of the diagram. There is a separate API guide available.



Benefits/Features

Some benefits and features are:

- Buyer can place orders and/or trouble tickets and/or Seller can receive orders and/or trouble tickets
- Configurable Catalog Management
 - Admins set up and modify their catalogs, includes trading partner specific management
 - Users select which product from the catalog they want to use for their order
- Data Enrichment
 - Configurable modules to setup rules for Due Date, and PON etc
 - Configurable modules to manage NC/NCI/SECNCI, ICSC, and ordering and billing contacts etc
 - Highly adaptable for custom Data Enrichment
- Multi Standard/Non-Standard Support – ASR, LSR, Broadband, MEF, and Trouble Admin etc
 - Maintain a common look and feel at front-end for all products
 - Standardized workflow and statusing
 - Support multiple Standards based backend integration

Audience

The material presented here is directed to users of Universal Order Connect (UOC), product and marketing staff at customer sites, and Neustar staff members who interact with customers or the application in some capacity.

Helpdesk/Support

If you need technical assistance, please contact OMS Customer Support using any of the following :

Online: NeuSupport website (<https://neusupport.neustar.com>)

You will need a user ID and password to log in to NeuSupport. To obtain one, call Neustar at (866) 638-9600, option 2

- **E-mail** clearinghouse@support.neustar
- **Phone** (866) 638-9600, option 2
- **Mail:** OMS Customer Support

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Chapter 2

Getting Started

Universal Order Connect (UOC) is a web-enabled software that can be accessed through your desktop or laptop Internet browser. No additional software is required. Neustar deployment staff will facilitate the initial setup for your domain, but then your own User Administrator will add the authorized users.

UOC is currently designed and tested to work with Internet Explorer, Edge, Firefox, and Chrome.

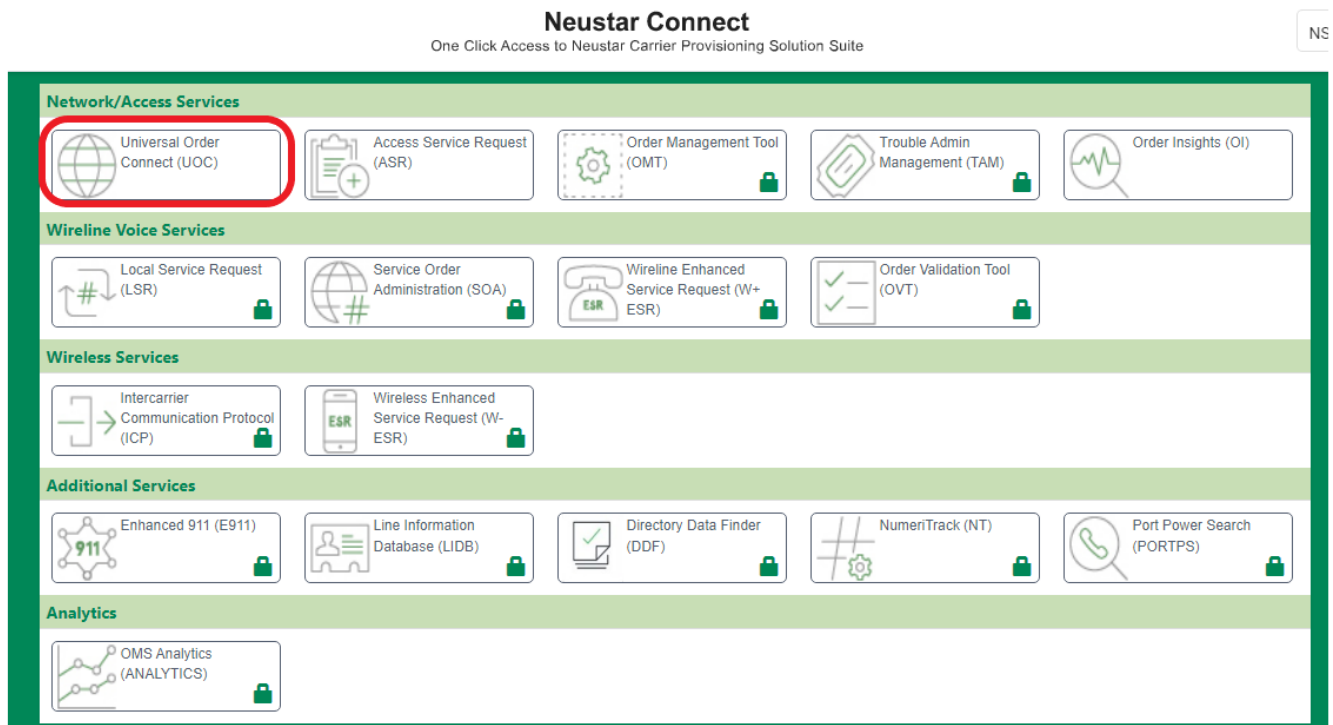
Safari is not currently tested or supported.

To access UOC, contact your User Administrator for the URL, domain name, your user id and password.

Note: To ensure that UOC pop-up windows function properly, make sure that any pop-up blocker software is disabled.

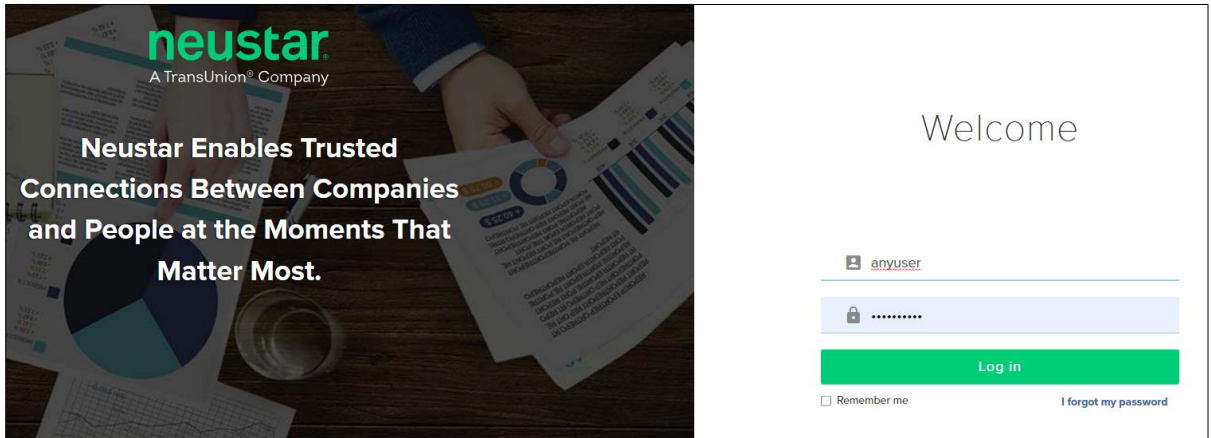
Landing Page

Neustar has a single-sign on landing page to access all your applications. From the landing page, select **Universal Order Connect (UOC)** under Network/Access Services.



Logging into UOC

At the user icon, enter your domain and, at the lock icon, enter your password. Click the **Log in** button.

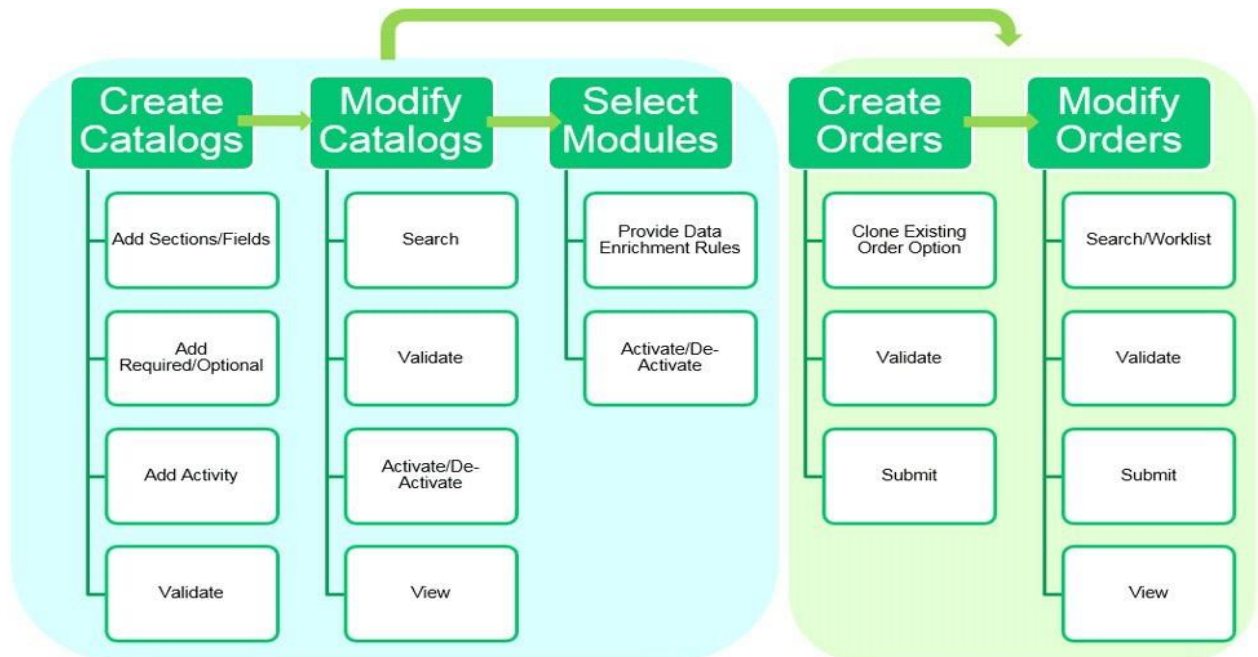


! Important: The Username and Password fields are case sensitive.

General Workflow

The following depicts the general workflow that will be followed in UOC:

- The boxes with the blue background depict the admin functions that impact order creation.
- The boxes with the green background depict the user functions for placing an order.



Entering or Selecting Data

There are several ways to enter data as follows:

- **Open Text boxes:** Open Text boxes are blank boxes that you can click in and type information.

Note: Do not use spaces at the beginning or end of text entries.

- **Lists/Drop Downs:** Lists display a set of items and may be identified by a down facing arrow:



- If a down facing arrow is present against a field, then a value must be selected from the drop down.
- If a down facing arrow is not present but drop-down listing values are available, you may select a value from the drop-down or type in your own value manually.

- **Checkboxes:** Checkboxes display a set of items and are identified by a box:



- To select an item, select the box.


- **Calendar:** Clicking the calendar icon next to a date field opens a calendar from which you can select dates. Default calendar date is Today.

! Important: Required fields are noted with a “*” (asterisk). Incorrect or missing information in a required field generates an error message that prompts you to correct the error and resubmit the request.

Navigating through the User Interface

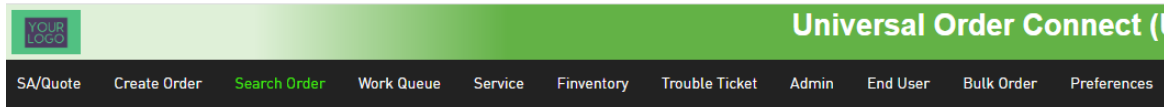
This section describes available methods for navigating through UOC screens.

Back Button

When using UOC, avoid using the browser **Back** button if it is enabled. There is a **Back**  icon on some screens that can be used to move backwards. You can also select a different screen from the main navigation bar or, if available, a sub menu.

Note: If you inadvertently click the **Back** button on the browser, click the **Forward** button to return the previous page.

Main Navigation Bar



You can use the links on the top main navigation bar to switch between different screens. To select a new screen, click on the option wanted and you will be hyperlinked to that screen.

The screen that you are currently viewing is highlighted in green font on the main navigation bar. All other screen options are displayed in white font.

! Important: You may not see all the options noted below in your main navigation panel. Options visible are based on how your domain was configured per contracts/agreements and user roles.

Screen	General Description	Chapter
Pre Order	Allows a user to create (buyside) or respond (sellside) to a service availability request and/or quote request. Allows a buyer to convert the request to an order. Allows user to perform various pre-order transactions such as Location, CFA, TNI, etc inquiries.	3
Create Order	Allows a user to create new orders.	4
Search Order	Allows a user to search for existing orders to modify, view, and respond etc.	5
Work Queue	Allows a user to monitor or respond to orders via a worklist or dashboard view Allows a user to modify, view, and respond etc. to existing orders.	6
API Work Queue	Allows a user associated to a seller domain to review orders prior to passing them to their internal applications via API for processing.	7
Circuit Insights	Allows a user to view information pertaining to a circuit such as financial, network data, equipment, and history etc.	8
Trouble Ticket	Allows a user to create, modify, view, respond etc to trouble tickets	9
End User	Allows user to manage End Users and their associated addresses	10
Bulk Upload	Allows a user the ability to download bulk templates and upload bulk orders.	11
Preferences	Allows a user to set their own screen preferences such as which columns to view and which order they want to view them	12

Timing Out of UOC

You will be logged off automatically, that is, “timed-out”, in the UOC Portal after 10 hours.

Logging out of UOC



To log out of UOC, click the log out Icon on the top right corner of any screen. Note: This does not log you out of the single sign-on screen.

Chapter 3

Pre Order

After selecting “Pre Order” on the Main Navigation bar, the Serviceability/Quote and Pre Order Transaction screen will be displayed.

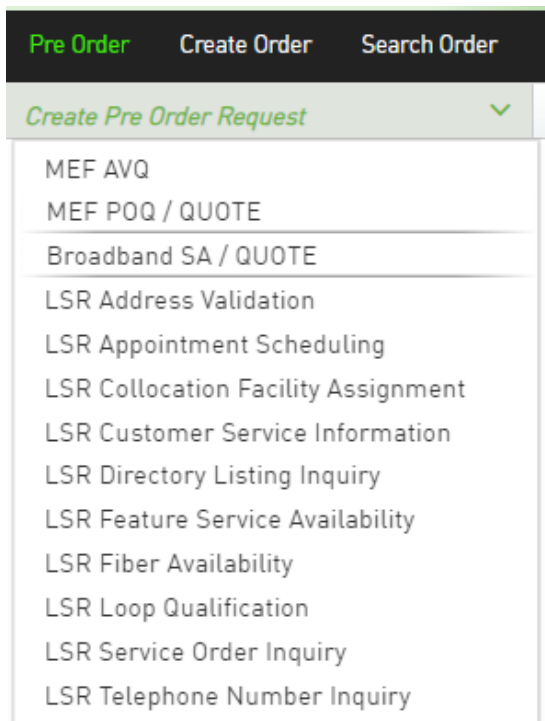
Users can create new pre order inquiries by selecting the **Create Pre Order Request** option from the sub menu.

Users can view existing pre order inquiries that have been submitted to a trading partner/seller by selecting the **Pre Order Work Queue** or **AVQ/LI Work Queue** options from the sub menu, locating the pre order transaction and selecting the hyperlink for that pre order transaction in the main panel.

Create Pre Order Request

There are various selections under the Create Pre Order Request sub section. Select an option from the drop down menu and you will be brought to the screen that performs the create request for that transaction.

Note: All pre order options may **not** be visible based on the domain set up.



The following pre-order create transactions are currently supported:

Application	Transactions	Type	Description
MEF	AVQ	MEF AVQ	Address Validation Qualification
	POQ/QUOTE	MEF POQ	Product Offering Qualification / Quote Allows a Buyer to check whether the Seller can deliver a product or set of products from among their product offerings at the geographic address or a service site specified by the Buyer; or modify a previously purchased product. Supported use cases: <ul style="list-style-type: none"> • Create Product Offering Qualification • Retrieve POQ List • Retrieve POQ by Identifier • Register for POQ Notifications
BROADBAND	SA/QUOTE	SA or QUOTE	Service Availability / Quote Allows a Buyer to query a seller(s) for end user location availability.
LSR	ADDRESS VALIDATION	LSR AVQ	Transaction Type = A: Validate an end user address using a working telephone number or the physical address.
	APPOINTMENT SCHEDULING	AS	Transaction Type = D: Reserve date and timeframe for service installation.
	COLLOCATION FACILITY ASSIGNMENT	CFA	Transaction Type = K: Validate UNE loops and splitters for collocation assignments terminating in a wire center.
	CUSTOMER SERVICE INFORMATION	CSI	Transaction Type = E: Provides access to data for the purpose of determining existing services for a specified end user. Validate using an ATN or ECCKT.
	DIRECTORY LISTING INQUIRY	DLI	Transaction Type = T: Provides access to existing listing data for the purpose of viewing existing listings for the specified end user. Depending on the specificity of the info, the listing database will return either the requested listing or a list from which the requester must select a more specific listing and enter a new request.
	FEATURE SERVICE AVAILABILITY	FSA	Transaction Type = C, J, L: Provides access to the following: C = Service/feature availability J = Code inquiry (Loop Makeup (LMU)) L = PIC company codes inquiry (Inter/Intra LATA PIC Availability)

	FIBER AVAILABILITY	FA	Transaction Type = N: Provides the facility availability environment at the end user location.
	LOOP QUALIFICATION	LOOP QUAL	Transaction Type = H: Used to determine xDSL extended loop lengths, qualification indicator, products available and if necessary, the reason the loop is not qualified for DSL. Validate using an end user address or WTN.
	SERVICE ORDER INQUIRY	SOI	Transaction Type = S: Used to query the Trading Partner about a request that has already been submitted.
	TELEPHONE NUMBER INQUIRY	TNI	Transaction Type = B: Used to request and reserve a TN(s) and assign the number to an end user.
ASR	future		

Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Validate**. Action buttons that are unavailable are dimmed/disabled. Action buttons are located on the top right main panel of a screen if applicable.

Create Pre Order

The following actions are supported for creation of a pre order transaction:

Button	Description
Clear	Clears the main panel fields that were entered by the user and resets it to the initial pre-order create screen.
Submit	Allows a pre order to be submitted to the trading partner/seller.
Validate	Validates against business rules and returns errors on the UOC pre order.

Validate

After population of the pre order transaction, select the **Validate** button, if any required fields are not populated or there is a business rule error associated to a field, the errors will display in red font on the top of the pre-order screen.

State/Province : is required field!

LSR Feature Service Availability Request	
Request Type*	Feature Service Availability
Customer Carrier Name Abbreviation	OMQ
Transaction Activity*	A
Transaction Type*	C
Type of Service	
State/Province*	I
Request Type	

You can select the error in red font on the top of the screen to be linked to the specific field in error so it can be corrected.

If there are no validation errors after selecting the Validate button, then a “Validation Successful” message will be displayed advising that all required fields are populated and there are no business rule errors that were found.

Validation Successful

LSR Feature Service Availability Request	
Request Type*	Feature Service

Submit

After population and successful validation of the pre order transaction, select the **Submit** button on the pre-order transaction so that it may be sent to the trading partner/seller. A message will appear on the top of the transaction advising if the transaction was submitted successfully as noted in the below sample message:

FSA1101 has been successfully submitted.

LSR Feature Service Availability Request	
Request Type*	Featu

If the transaction was submitted successfully then it will be available on either the Pre Order Work Queue or the

AVQ/LI Work Queue based upon the type of transaction.

Help Text

In order to see help text for a given field on a pre order, click on the field name and a pop-up will appear with any available help text.

To close the box, click the Close button at the bottom right corner of the pop-up.

LSR Transaction Activity

For LSR pre-order, certain transactions require a transaction activity to be selected:

Select the Transaction Activity, when required, based on below chart.

Transaction Activity	Description	Applies to Transaction Type (TXTYP):
A	New Inquiry	B, C, D, E, H, J, K, L, N, S, T
B	Pre-posted Service Order(s)	E, K, N, S, T
C	TN Confirmation Inquiry	B, E, K, N, S
D	Results	E, K, N, S
E	Selection	B, E, H, K, N, S, T
F	Facility Information	E, K, N, S
K	Cancel Selection or Reservation	B, D, E, H, K, N, S
R	Reservation	B, D, E, H, K, N, S

Pre Order Work Queue

The pre order work queue contains all pre order transactions that are not associated with an address/location inquiry transaction.

There is a left panel Refine By and a main panel containing the pre-order transactions that have been submitted.

Buyer SA/Quote ID	Seller SA/Quote ID	Type	Pre Order Status	End User Name	End User Address	Seller	SA Status	SA Rating	Download Speed	Upload Speed	Product Name	Product
FSA1101		FSA	SENT									
Q1148	NSR_00920	QUOTE	SUCCESS	CONSOLIDATED TEST DEMO	123 N MAIN RESTON VA 12345	Green Tea Telecom	On-net	GREEN			BROADBAND INTERNET	
Q1148	NSR_00919	QUOTE	SUCCESS	CONSOLIDATED TEST DEMO	123 N MAIN RESTON VA 12345	Green Tea Telecom	On-net	GREEN			BROADBAND INTERNET	
03222024-1		MEF POQ	SENT									

Refine By Left Panel – Pre Order Work Queue

The left hand panel contains the “Refine By” criteria. The following criteria are available:

Refine By Field	Description
PROVIDER (SELLER) or BUYER	<ul style="list-style-type: none"> ▪ Allows search via Trading Partner ▪ Provides a list of Trading Partners for selection ▪ Allows single and multiple selections
PRE ORDER STATUS	<ul style="list-style-type: none"> ▪ Allows search via Status ▪ Provides a list of status' for selection ▪ Allows single and multiple selections
PRODUCT NAME	<ul style="list-style-type: none"> ▪ Allows search via Product ▪ Provides a list of Products for selection ▪ Allows single and multiple selections
CREATE DATE f- REQUEST DATE	<ul style="list-style-type: none"> ▪ Allows search via From and To Create Date/Date that the transaction was submitted to the Trading Partner
GROUP ID	<ul style="list-style-type: none"> ▪ Allows search via a project name used to group a set of orders (mapped to order)
END USER	<ul style="list-style-type: none"> ▪ Allows search via an End User Customer
CITY	<ul style="list-style-type: none"> ▪ Allows search via an End User City
STATE	<ul style="list-style-type: none"> ▪ Allows search via an End User State
ZIP	<ul style="list-style-type: none"> ▪ Allows search via an End User Zip Code
UOC SA/QUOTE ID	<ul style="list-style-type: none"> ▪ Allows search via a UOC SA/Quote ID
BUYER GROUP SA/QUOTE ID	<ul style="list-style-type: none"> ▪ Allows search via a Buyer Group SA/Quote ID used to group a set of pre-order transactions (not mapped to order)
BUYER SA/QUOTE ID	<ul style="list-style-type: none"> ▪ Allows search via a Buyer SA/Quote ID

Refine By Field	Description
SELLER SA/QUOTE ID	<ul style="list-style-type: none"> Allows search via a Seller SA/Quote ID

Once the criteria is populated, select the **Refine By** button on the top of the left panel.

To revert to the default search, select the **Reset** button.

Wildcard Searches

When you are selecting criteria for a search in the UOC portal, you may select a value from a list, enter a date range, or type a value in a field. In fields where you type a value into a field, you can use the % character to expand the scope of the search.

%: Use % to represent one or more characters.

Examples:

- Enter %123 to return matches that end with 123, such as 234123 and 78123.
- Enter 123% to return matches that begin with 123, such as 123456 and 12389.
- Enter 12%45 to return matches that have any number of characters between 12 and 45, such as 126645 and 1288845.

Display Result Main Panel – Pre Order Work Queue

The main panel worklist shall display all pre order transactions that are not Address or Location inquires based on the criteria selected in the left panel. The following fields shall be available:

Main Panel Field	Description
BUYER SA/QUOTE ID	<ul style="list-style-type: none"> Use the populated value to hyperlink back into the pre order transaction screen Displays the buyer pre order ID for the associated pre order transaction
SELLER SA/QUOTE ID	<ul style="list-style-type: none"> Displays the seller pre order ID for the associated pre order transaction
TYPE	<ul style="list-style-type: none"> Displays the type of pre order transaction that was performed
PRE ORDER STATUS	<ul style="list-style-type: none"> Displays the current Order Status associated to the pre order transaction
END USER NAME	<ul style="list-style-type: none"> Displays the End User associated to the pre order transaction

END USER ADDRESS	<ul style="list-style-type: none"> ▪ Displays the End User Address associated to the pre order transaction
SELLER or BUYER	<ul style="list-style-type: none"> ▪ Displays the Trading Partner associated to the pre order transaction
SA STATUS	Displays the Service Availability Status: <ul style="list-style-type: none"> ▪ On-net ▪ Near-Net ▪ Off-net
SA RATING	Displays the Service Availability Rating: <ul style="list-style-type: none"> ▪ Green ▪ Yellow ▪ Red
DOWNLOAD SPEED	<ul style="list-style-type: none"> ▪ Displays the download speed associated to the pre order transaction
UPLOAD SPEED	<ul style="list-style-type: none"> ▪ Displays the upload speed associated with the pre order transaction
PRODUCT NAME	<ul style="list-style-type: none"> ▪ Displays the Product Name associated to the pre order transaction
PRODUCT TYPE	<ul style="list-style-type: none"> ▪ Displays the product type associated to the pre order transaction
PRICE MRC	<ul style="list-style-type: none"> ▪ Displays the MRC returned from the seller for the pre order transaction
PRICE NRC	<ul style="list-style-type: none"> ▪ Displays the NRC returned from the seller for the pre order transaction
TERM	<ul style="list-style-type: none"> ▪ Displays the Term (aka VTA) requested for the pre order transaction
REQUEST DATE	<ul style="list-style-type: none"> ▪ Displays the date the pre order transaction was submitted to the seller
LAST ACTIVITY DATE	<ul style="list-style-type: none"> ▪ Displays the Last Activity Date associated to the pre order transaction
PON STATUS	<ul style="list-style-type: none"> ▪ Displays the PON status associated to the pre order transaction
GROUP ID	<ul style="list-style-type: none"> ▪ Displays the Group ID associated to the pre order transaction which will map to the order

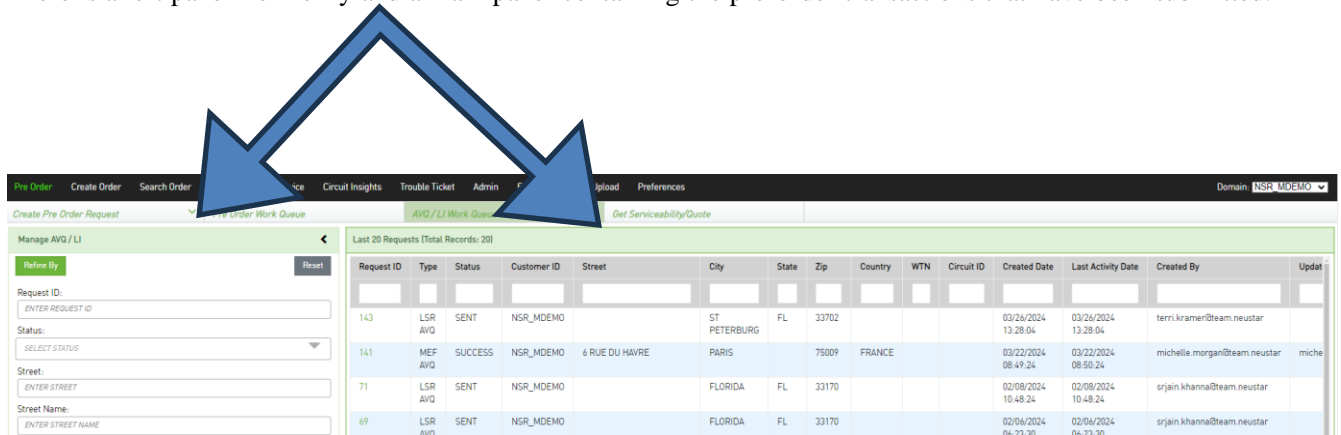
Worklist Column Search

The search bar on the top of each worklist column shall provide the ability to find a specific order or set of orders from the orders displayed in the worklist main panel. The orders displayed in the worklist main panel are based on the Refine By in the left panel.

AVQ/LI Work Queue

The AVQ/LI work queue contains only those pre order transactions that are associated with an address/location inquiry transaction.

There is a left panel Refine By and a main panel containing the pre-order transactions that have been submitted:



Refine By Left Panel – AVQ/LI Work Queue

The left hand panel contains the “Refine By” criteria. The following criteria are available:

Refine By Field	Description
REQUEST ID	<ul style="list-style-type: none"> ID auto assigned by UOC for tracking
STATUS	<ul style="list-style-type: none"> Allows search via Status Provides a list of status' for selection Allows single and multiple selections
STREET	<ul style="list-style-type: none"> Allows search via Street
STREET NAME	<ul style="list-style-type: none"> Allows search via Street Name
STREET TYPE	<ul style="list-style-type: none"> Allows search via Street Type such as ST, AVE, HWY, etc
CITY	<ul style="list-style-type: none"> Allows search via City
STATE	<ul style="list-style-type: none"> Allows search via State
COUNTRY	<ul style="list-style-type: none"> Allows search via Country
ZIP	<ul style="list-style-type: none"> Allows search via Zip

Refine By Field	Description
WTN	<ul style="list-style-type: none"> Allows search via working telephone number
CIRCUIT ID	<ul style="list-style-type: none"> Allows search via Circuit ID
CREATE DATE	<ul style="list-style-type: none"> Allows search via From and To Create Date/Date that the transaction was submitted to the Trading Partner

Once the criteria is populated, select the **Refine By** button on the top of the left panel.

To revert to the default search, select the **Reset** button.

Wildcard Searches

When you are selecting criteria for a search in the UOC portal, you may select a value from a list, enter a date range, or type a value in a field. In fields where you type a value into a field, you can use the % character to expand the scope of the search.

%: Use % to represent one or more characters.

Examples:

- Enter %123 to return matches that end with 123, such as 234123 and 78123.
- Enter 123% to return matches that begin with 123, such as 123456 and 12389.
- Enter 12%45 to return matches that have any number of characters between 12 and 45, such as 126645 and 1288845.

Display Result Main Panel – AVQ/LI Work Queue

The main panel worklist shall display all pre order transactions that are not Address or Location inquires based on the criteria selected in the left panel. The following fields shall be available:

Main Panel Field	Description
REQUEST ID	<ul style="list-style-type: none"> Use the populated value to hyperlink back into the pre order transaction screen Displays the Request ID auto generated by the pre order transaction

TYPE	<ul style="list-style-type: none"> ▪ Displays the Type of pre order that is associated with the transaction ▪ Some samples are: <ul style="list-style-type: none"> - LSR AVQ - MEF AVQ
STATUS	<ul style="list-style-type: none"> ▪ Displays the last Status associated to the pre order transaction
CUSTOMER ID	<ul style="list-style-type: none"> ▪ Displays the Customer ID associated to the pre order transaction
STREET	<ul style="list-style-type: none"> ▪ Displays Street associated to the pre order transaction
CITY	<ul style="list-style-type: none"> ▪ Displays City associated to the pre order transaction
STATE	<ul style="list-style-type: none"> ▪ Displays State associated to the pre order transaction
ZIP	<ul style="list-style-type: none"> ▪ Displays Zip Code associated to the pre order transaction
COUNTRY	<ul style="list-style-type: none"> ▪ Displays Country associated to the pre order transaction
WTN	<ul style="list-style-type: none"> ▪ Displays working telephone number associated to the pre order transaction
CIRCUIT ID	<ul style="list-style-type: none"> ▪ Displays Circuit ID associated to the pre order transaction
CREATE DATE	<ul style="list-style-type: none"> ▪ Displays the Create Date associated to the pre order transaction
LAST ACTIVITY DATE	<ul style="list-style-type: none"> ▪ Displays the Last Activity Date associated to the pre order transaction
CREATED BY	<ul style="list-style-type: none"> ▪ Displays the Created By user associated to the pre order transaction
UPDATED BY	<ul style="list-style-type: none"> ▪ Displays the Updated By user associated to the pre order transaction

Worklist Column Search

The search bar on the top of each worklist column shall provide the ability to find a specific order or set of orders from the orders displayed in the worklist main panel. The orders displayed in the worklist main panel are based on the Refine By in the left panel.

Response Creation

After selecting “Pre Order” on the Main Navigation bar, the Serviceability/Quote and Pre Order Transaction screen will be displayed.

Users can view & respond back to existing pre order inquiries that have been submitted by a trading partner/buyer by selecting the **Pre Order Work Queue** or **AVQ/LI Work Queue** options from the sub menu, locating the pre order transaction and selecting the hyperlink for that pre order transaction in the main panel.

PRE ORDER Responses

In the Pre Order Work Queue, which contains all pre order transactions that are **not** associated with an address/location inquiry transaction, find the transaction that you want to view or respond to by using the left panel Refine By selections or locate it directly in the main panel. Once the transaction is found, select the **Buyer SA/Quote ID** value to be hyperlinked into the pre order:

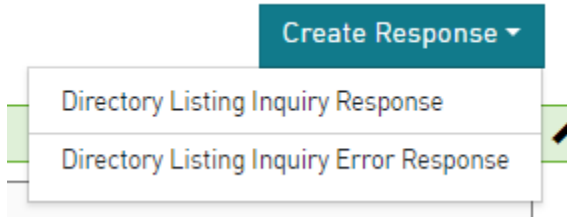
Total Records: 29				
<input type="checkbox"/>	Buyer	Buyer SA/Quote ID	Seller SA/Quote ID	T
<input type="checkbox"/>	Route Communications	DLI1104		D
<input type="checkbox"/>	Route Communications	AS1103		A
<input type="checkbox"/>	Route	AS1101		F

Once you are in the pre order screen for a transaction that is not AVQ/LI, review the details and then select the **Create Response** button located in the top right of the screen.



! Note: The screen will look different based on what type of pre order transaction you are viewing and responding to.

If there is more than one option for a response, select the response that you want to provide for that transaction from the menu list provided. Here is a sample menu list of responses that can be provided for an LSR DLI (Directory Listing Inquiry) response:



Once a response option is selected from the menu list or, if there is only one response that can be provided, the screen will load with the appropriate fields associated with the response.

The top portion of the screen will always contain the History for that transaction. Here is a sample history for an LSR Appointment Scheduling transaction:

LSR Appointment Scheduling History								
Select	Buyer	Buyer SA/Quote ID	Seller SA/Quote ID	Type	End User Name	End User Address	SA Status	SA Rating
<input type="radio"/>								
<input checked="" type="radio"/>	NSR_MDEMO	AS1103		AS				

Under the Pre Order Transaction History:

- Action button(s) available such as **Create Response**, **Reset**, **Submit**, etc:



- Buyer submission form with any populated values
- Response fields for seller population

Fill out the response section as appropriate for the pre order and then click the **Submit** button to send the response back to the buyer.

You may also click the **Reset** button to reset the screen to the initial landing view prior to any changes.

If you are entering a screen that already had a response submitted for that transaction then you can select the **Edit Response** button to modify the response if available.

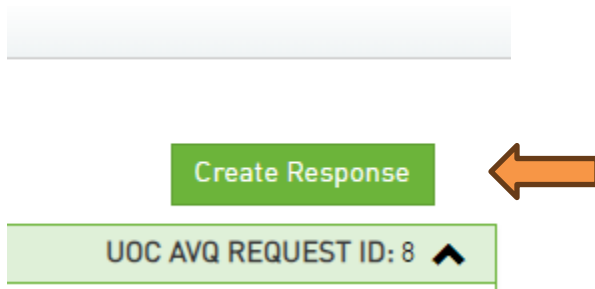


AVQ/LI Responses

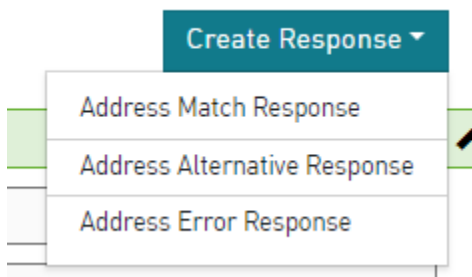
In the AVQ/LI Work Queue, which contains only those pre order transactions that are associated with an address/location inquiry transaction, find the transaction that you want to view or respond to by using the left panel Refine By selections or locate it directly in the main panel. Once the transaction is found, select the **Request ID** value to be hyperlinked into the pre order:

Last 20 Requests [Total Records: 20]			
<input type="checkbox"/>	Request ID	Type	Status
<input type="checkbox"/>	143	LSR AVQ	RECEIVED
<input type="checkbox"/>	141	MEF AVQ	SUCCESS

Once you are in the pre order screen for an AVQ/LI transaction, review the pre order transaction details and then select the **Create Response** button located in the top right of the screen.



If there is more than one option for a response, select the response that you want to provide for that transaction from the menu list provided. Here is a sample list of responses that can be provided for an LSR AVQ response:



Once a response option is selected from the list or, if there is only one response that can be provided, the screen will load with the appropriate fields associated with the response. The top portion of the screen will contain the buyer submitted values and the bottom portion of the screen will contain the response fields for population.

Fill out the response with the appropriate values for the pre order and then click the **Submit** button to send the response back to the buyer.

You may also click the **Reset** button to reset the screen to the initial landing view prior to any changes.

If you are entering a screen that already had a response submitted for that transaction then you can select the **Edit Response** button to modify the response if available.

Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Reset**.

The following actions are supported for creation of a response:

! Important: You may not see all the options noted below. Options vary per pre order.

Button	Description
Create Response	Allows a user to create a new response.
Edit Response	Allows a user to modify an existing response.
Submit	Allows a response to be submitted to the trading partner.
Reset	Allows the pre order response to reset back to when the transaction initially loaded from the work queue.
Validate	Validates against business rules and returns errors on the UOC response.

Chapter 4

Order

User's can create new orders by selecting the "Create Order" option from the main menu.

User's can view existing orders that have been saved in draft status or submitted to a trading partner/seller by selecting the "Search Order" or "Work Queue" options from the main menu, locating the order and selecting the order hyperlink.

Note: User's will land on the Work Queue when first logging into the application.

Order Left Panel

Order Creation

The left panel contains the Order Creation details. These fields will become non-editable once the order has been submitted to the trading partner. The following fields shall be available on new order creation:

Order Creation

Order Type : Universal Product

Set As Default

Order Creation Details

Please specify the Product Name:

SELECT PRODUCT NAME ▼

Trading Partner (Seller):

SELECT TRADING PARTNER (SELLER) ▼

Activity:

SELECT ACTIVITY ▼

Please specify the Universal Name:

SELECT UNIVERSAL NAME ▼

Order Creation Field	Description
Order Type	<p>Options shall be Universal and Product.</p> <p>Only 1 option can be selected. The domain set-up shall determine which option you should always use.</p> <p>You may default the selection for this field by selecting the option you always use and checking the “Set As Default” box.</p>
Please specify the Product Name	<p>Required to submit an order.</p> <p>From the drop down, select the Product Name from the Product Catalog that shall be applied to this order.</p>
Trading Partner (Seller)	<p>Required to submit an order.</p> <p>Drop-down containing your companies configured Trading Partners for which you are allowed to place orders.</p> <p>Select the Trading Partner that shall receive the request.</p>
Activity	<p>Required to submit an order.</p> <p>Drop-down containing a list of activities:</p> <ul style="list-style-type: none"> ▪ Install ▪ Change ▪ Record ▪ Inside Move ▪ Outside Move ▪ Disconnect <p>Note: Which activities are available is based on product selection.</p>
Please specify the Universal Name	<p>Required when “Universal” is selected in the Order Type field.</p> <p>From the drop down, select the Universal Name that shall be applied to this order.</p> <p>Note: If the product name is selected first then the Universal Catalog shall be populated automatically if required.</p>

Add Note

You can add a note directly from the left panel.

Note: On creation of a new order, this note will only be retained if the order is saved or submitted. Perform the following steps to add a note:

Step 1. Select from the Category drop-down.

Step 2. Type the note in the Note field.

Step 3. Hit the Save button.

User Override

After an initial order is submitted or saved, a user override section may be visible on the left panel of an existing order based on your user role.

There are currently two options in the User Override section:

- **Supplement:** To override the system determined SUP value upon submission of an order, select a value from the Supplement drop down. The value selected will take precedence for that submission and no system determination will occur. The auto determined supplement value will resume upon future submissions for that order when there is no Supplement Override value.
- **Version:** To override the system generated/incremented VER value upon submission of an order, type a two-digit VER value in the open text box. The value provided will take precedence for that submission and no system auto incrementation will occur. The VER value will continue to get auto incremented upon future submissions for that order when there is no Version Override value.

Summary

After an initial order is submitted or saved, a summary section will be visible on the left panel of an existing order.

Most fields are only visible in the summary when a value is populated for that field. Editable fields are always visible.

The summary section will be a combination of order and response details and may contain some of the following fields:

Field	Values
Request Number (PON)	
UOC Order ID	UOC auto generated number
Application	Supported applications are ASR, Broadband (BB), MEF, LSR, Trouble Admin, etc
Owner	User's email or ID who owns the order
Seller Virtual Order Number	Seller order number for the virtual circuit
Seller Virtual Circuit ID	
Buyer Virtual Circuit ID Reference	
Seller Order Number	Seller order number for the physical circuit
Seller Circuit ID	
Errors	Will display errors associated to the following responses: <ul style="list-style-type: none"> ▪ TP REJECT ▪ TP ERROR ▪ TP ADDRESS ERROR ▪ TP JEOPARDY
Requested Due Date	Also known as DDD
TP Scheduled Date	Also known as DD
TP Completion Date	Also known as CD
Created Date	
Last Updated	Date the order was last modified

Buyer ID (CCNA)	
Seller ID (ICSC)	
Buyer Version	Also known as VER
Supplement Type	
Quantity	
Expedite	
Related Purchase Order Number	
Telecommunications Service Priority	
End User	
End User Address	
Buyer Order ID	Editable
Seller Order ID	Editable
Group ID	Editable Displays the buyers internal grouped/project name for the order. This value is not sent to the seller.
Requested Due Date	Displays the buyer's desired due date for the order
TP Facility Date	Displays the trading partner Due Date from the latest confirmation notice (FOC). When a combination order is split into two separate child orders and is not a disconnect then the date will be the latest date received between both child latest confirmation notices. When a combination order is split into two separate child orders and is a disconnect then the date will be the earliest date received between both child latest confirmation notices. When a confirmation notice has not yet been received, the customer requested/desired due date is displayed.
TP Facility Scheduled Date	Displays the trading partner Facility Due Date from the latest confirmation notice (FOC) when service Type is Trunking.
TP Completion Date	Displays the trading partner actual date of completion.
Error(s)	Will display errors associated to the following responses:

	<ul style="list-style-type: none"> ▪ TP REJECT ▪ TP ERROR ▪ TP ADDRESS ERROR ▪ TP JEOPARDY
--	--

Audit Trail

After an initial order is submitted or saved, an audit trail will be visible on the left panel of an existing order.

The audit trail is defaulted to an expanded view. To collapse the view, select the up arrow on the Audit trail box. To expand the view, select the down arrow on the audit trail box.

The audit trail will provide a list of all statuses in descending order with the associated date/time stamp each status occurred along with the username.

Superscript Values

You may see a superscript value against a status in the audit trail as follows:

Values can be any of the following:

Superscript Values	Additional Info
OI	Indicates response originated from Order Insights
FLUP-1/ FLUP-2/ FLUP-3	For TP INFORMATIONAL response originating from Neustar, to notify the buyer of which Neustar follow up was performed 1, 2 or 3.

Order Main Panel

The main panel shall be used to populate the order information as well as perform actions using the action buttons in the top right.

Universal Tab

When Order Type selection is Universal in the left panel, the default tab on the main panel will be the Universal tab.

Multiple product names can be associated with the same universal allowing for single API order submission as well as other customized capabilities. Once a product name is applied to an order by selecting a value in the **Please specify the Product Name** field drop-down in the left panel, the Universal name associated with that product will automatically be selected.

Once the left panel Order Creation Details is populated, the main panel will be loaded. The product selected will dictate how the main panel looks...which sections and fields are available on the Universal tab, etc. You will not be able to select the product tab, if visible, when any required fields are blank on the Universal tab. The Universal tab should contain all the information a buyer needs to place an order. If any fields are defaulted, they may be over-ridden by the buyer. In contrast, the Product tab, if visible, should contain all the information a seller needs to receive an order. Many fields default on the product order that do not need to be provided by the buyer on the Universal. This makes the ordering simplified for the buyer since they are only providing the information that is unique while the seller is still receiving the format that they expect based on the supported industry standard, etc

Buyer shall populate the Universal tab with the information required to place their order. Once the Universal order contains all necessary information, validate the order using the “Validate” button located in the top right corner of the page. Note: The information populated on the Universal tab will be automatically mapped to the Product tab based on how the product is configured therefore viewing the product tab is completely optional when your Order Type is set to Universal.

The buyer will need to resolve the errors received during the validation process so the order can be sent to the seller. Selecting the error from the top of the page will link to the field that needs to be corrected. Once the order is error free, use the “Submit” button located in the top right corner to send it to the seller. If the order is submitted prior to selecting “Validate” and there are business rule errors then the status of the order will be changed to BR ERROR and the order will not be sent to the seller until the errors are resolved.

The buyer may also use the “Save” button to save the order instead of “Submit” if the key fields needed to save an order are populated: Request Number (PON), Buyer ID (CCNA) and Seller ID (ICSC).

Product Tab

When Order Type selection is Product in the left panel, the default tab on the main panel will be the Product tab.

Once the left panel Order Creation Details is populated, the main panel will be loaded. The product selected will dictate how the main panel looks...which sections and fields are available on the Product tab, etc. The product tab may contain defaults associated to the product selected and may be over-ridden by the buyer. The Product tab must contain all the information a seller needs to receive an order.

The buyer shall populate the Product tab with the information required to place their order. Once the Product order contains all necessary information, validate your order using the “Validate” button located in the top right corner

of the page.

The buyer will need to resolve the errors received during the validation process so the order can be sent to the seller. Selecting the error from the top of the page will link to the field that needs to be corrected. Once the order is error free, use the “Submit” button located in the top right corner to send it to the seller. If the order is submitted prior to selecting “Validate” and there are business rule errors then the status of the order will be changed to BR ERROR and the order will not be sent to the seller until the errors are resolved.

The buyer may also use the “Save” button to save the order instead of “Submit” if the key fields needed to save an order are populated: Request Number (PON), Buyer ID (CCNA) and Seller ID (ICSC).

Order History Tab

Universal Order	Product Order	Order History	Tasklist	Notes	Print
Req Version : 02					07/09/2020 01:57:22 PM View Details
Rsp Version : 01 Clarification : TP ERROR					07/09/2020 01:48:24 PM View Details
Rsp Version : 01 Acknowledgment : TP ACCEPT					07/09/2020 01:45:28 PM View Details
Req Version : 01					07/09/2020 01:44:57 PM View Details
Rsp Version : 01 Negative Acknowledgement : TP REJECT					07/09/2020 01:43:09 PM View Details

Note: The Order History tab is not visible upon creation of an order.

After an initial order is saved or submitted, an Order History tab will be visible in the main panel of the order directly following the Product tab. Any previously submitted versions of the order as well as seller responses shall be listed in descending order with the latest on top.

Only those fields that are populated in the response from the seller are visible in the order history. If a field is not visible, then it was not provided back on the response from the seller.

Select “View Details” to view an order version or seller response.

- Selection of an order version will bring up a new tab with the order information.
- Selection of a trading partner response will expand the row within the order history and display the response details.
- To collapse a response, select “Hide Details”.

Superscript Values

You may see a superscript value against an order or response in the order history tab.

Universal Order	Product Order	Order History	Tasklist	Notes
Response for Version : 01 Remarks : TP INFORMATIONAL ^{FLUP-3}				

The following values may be visible:

Order

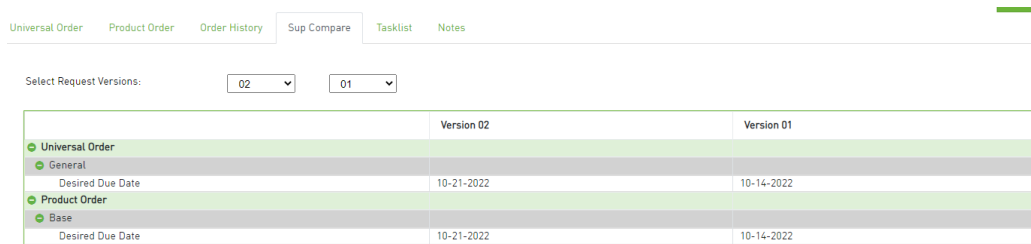
Superscript Values	Additional Info
CH	Indicates order originated from ClearingHouse

Response

Superscript Values	Additional Info
OI	Indicates response originated from Order Insights
FLUP-1/ FLUP-2/ FLUP-3	For TP INFORMATIONAL response originating from Neustar, to notify the buyer of which Neustar follow up was performed 1, 2 or 3.

SUP Compare Tab

After a version gets incremented due to a modification to an existing order, a SUP Compare tab will be visible in the main panel of the order directly following the Order History tab.



Tasklist Tab

Future...this tab is being revamped

Notes Tab

The Notes tab in the main panel of each order allows users to add information and track the history for the life of an order. The notes tab is always visible.

Add Note

Perform the following steps to add a note:

- Step 1.* Click the **Notes** tab to add a note.
- Step 2.* In the **Add Note** pane, select a category from **Category** drop-down and add required text in the **Note** text field.
- Step 3.* To add a document, select the **Choose File** button in the Attach File field, find the saved document and then double click it to upload. Enter the name of the document in the **Document Title** field associated to the attached document.
- Step 4.* Click **Save** to save the note.

Notes History

Whether a note is added in the left panel or main panel, the Note History section will capture all notes in descending order based on the Created Date.

Each column in the note history table is searchable and sortable.

To sort, select the column header field name for ascending and twice for descending.

To search, use the open text boxes under the column header field name and type in your search criteria.

Category	Created Date	Created By	Notes
General	11/01/2019 09:25:00	tkramer	Note 2 Test
Follow Up	11/01/2019 09:24:25	tkramer	Contacted Trading Partner representative Beth Doe to determine when my FOC was going to be received.

After saving or submitting the initial order, you may search based on a created date range.

1. Click “**CREATE DATE FROM**” to select the required create date.
2. Click “**CREATE DATE TO**” to select the required date.
3. Click **Search** to find the note history for particular date range.
4. The notes associated with that date range will be visible in the table.

Timeline




The Timeline is not visible upon creation of an order.

After an initial order is submitted or saved, a timeline will be visible on the top portion of an existing order. If the timeline goes beyond a single line, it will be in a collapsed view and only the latest status boxes will be visible.


The down arrow located on the top right of the timeline will expand the timeline. The up arrow located on the top right of the timeline will collapse the timeline.

The timeline will provide a visual view of which statuses have already occurred and which statuses will occur in the future (using a sunny day scenario). Additional statuses will be inserted into the timeline as they occur.

Reload

You can reload the timeline by selecting the re-load icon  in the top right corner of the order screen.

View in Full

You can view the full timeline by selecting the down icon  in the top right corner of the order screen.

Rectangular Outline

If status has already occurred, a rectangular box outline shall be displayed in green for Complete.

If status is in the future and directly after a rectangular box with a green outline with blue status font, a rectangular box outline shall be displayed in yellow for Pending (aka the next status that is expected to occur).

Otherwise, a rectangular box outline shall be displayed in black for the Future.

Font Color

If any rainy day/error type status occurs, the status will be displayed in red font within the rectangle box, some examples of rainy-day statuses are:

- TP REJECT
- TP ERROR
- TP ADDRESS ERROR
- TP JEOPARDY

Red font will also be displayed when an event is inserted into the timeline for a missed SLA otherwise all other events will be displayed in blue font within the rectangle box.


If an SLA has been set for a specific status, then the SLA information will also be displayed within the rectangle.

A minus (-) sign before the number of days indicates that the SLA provided is in the future by the number of days indicated.

A plus (+) sign before the number of days indicates that the SLA is in the past or has been missed by the number of days indicated. For this scenario, an additional rectangle is inserted into the timeline for the Missed SLA.



You Are Here

The “You Are Here” icon  in a timeline box indicates the last action that occurred on an order.

Superscript Values

You may see a superscript value against a status in the timeline as follows:



You may see the following superscript values:

Superscript Values	Additional Info
OI	Indicates response originated from Order Insights
FLUP-1/ FLUP-2/ FLUP-3	For TP INFORMATIONAL response originating from Neustar, to notify the buyer of which Neustar follow up was performed 1, 2 or 3.

Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Validate**. Action buttons that are unavailable are dimmed/disabled. Action buttons are located on the top right main panel of a screen if applicable.

Create Order

The following actions are supported for creation of an order:

Button	Description
Submit	<p>Allows an order to be submitted to the trading partner/seller and, if error free and not held for approval, sent to the Trading Partner.</p> <p>If a product setting and/or user role moves an order to Hold for Approval, it must be approved before the order will be sent to the seller.</p> <p>If there is a validation error, such as BR ERROR, it must be resolved before the order is sent to the seller.</p>
Save	Allows an initial order to be saved in a draft status and not submitted to the trading partner.
Validate	Validates against business rules and returns errors on the UOC order.

Modify Order

The following actions are supported for modification of an order:

! Important: You may not see all the options noted below in every drop down. Options vary per order.

Button	Menu	Description
Edit Order		<p>Allows a user to edit an order that is not assigned to them (not the owner).</p> <p>When this button is selected, the screen will become enabled for editing.</p> <p>Note: If the order is assigned to you (you are the owner) then you automatically are able to edit the order without using the Edit Order button.</p>
Create New Order		<p>Allows a user to create a new order.</p> <p>When this button is selected, the screen will display in the same fashion as if the Create Order main menu was selected and you will be able to create a new order from scratch.</p>
More Actions	Cancel Order	<p>Allows an order that has previously been submitted to a trading partner to be canceled with 1 button.</p> <p>A supplement will be issued to the trading partner requesting the order to be canceled.</p>
	Change Order	Allows user to initiate a change order from a previously created order when a circuit is Active (install order has been completed) and the change button configuration setting is turned on (by default it is On).
	Disconnect Order	Allows user to initiate a disconnect order from a previously created order if circuit service status is Active in the service module and the disconnect button configuration setting is turned on (by default it is On).

	Delete Order	Allows an order that has never been submitted to the trading partner to be deleted in UOC only. Note: Order is still visible in CH if applicable.
	ASR View	Allows user to view order data that is being sent to the trading partner in the trading partner format when that format is an industry standard.
	Go To ASR	Allows user to view an ASR order in the ClearingHouse (CH). User must be in edit mode on the order to see this option. Note: ASR View option in UOC provides same view as ASR in CH
	API JSON	Allows user to view the order via JSON format. Buyer: Minimal payload (less defaults, enrichment, etc) needed from the customer on an order. Seller: Minimal payload needed from the seller for a response. (Future implementation)
	Full JSON	Allows user to view the order via full JSON format Buyer: Full payload (including defaults, enrichments, etc) available from the customer. Seller: Full payload available from the seller for a response.
	Customer API	Allows user to view the order data that was sent by customer via API Allows user to view the response data that was sent by the seller via API
Submit		Allows an order to be submitted to the trading partner/seller and, if error free and not held for approval, sent to the Trading Partner. -If a product setting and/or user role moves an order to Hold for Approval, it must be approved before the order will be sent to the seller. -If there is a validation error, such as BR ERROR, it must be resolved before the order will be sent to the seller.
Save		Allows an initial order to be saved in a draft status and not submitted to the trading partner.
Validate		Validates against business rules and returns errors on the UOC order.
Approve & Submit		Allows a user with a role providing approver rights to approve an order that was moved to Hold for Approval.
Create Response		Allows a user to create a response back to the Buyer.

Repeating Sections

A section on either the Universal or Product tab can be tagged as repeatable with the maximum number of times it can be repeated.

The repeatable sections will be indicated by the following on the right side in the header of that section:

Repeat Count:



Update/Go button

- To repeat a section on the order, update the **Repeat Count** text field with the increased number of sections needed and hit the Update/Go icon in the header of the section that needs to be repeated.
- You can also use this same method for removing a section. Simply update the text box by decreasing the number of sections needed and hit the Update/Go icon in the header of the section. The sections will be removed from the end.
- If a repeating section is left completely blank, it will not be passed to trading partner.

Group ID

Group ID is always located in the main panel on the universal and product tabs in the 1st section of the order. This field can be used as an internal project ID to group a set of orders for internal tracking purposes. This field is not sent to the seller and is only visible in UOC. You may search on the Work Queue and Search screens using a Group ID value and this value is visible on the results returned from the search.

The screenshot shows the 'SWITCHED ETHERNET COMBO EU - DEMO' order details. The 'Group ID' field is highlighted with a black box. Other fields include CCNA* (OMZ), ICSC* (LT30), REQ TYP* (ED), RTR* (F = Send FOC Only), CUST* (ANY CUST), PON* (ASRS092020A01338), D/TSENT* (09-22-2020-0117PM), DDD* (10/29/2020), and BAN* (E = Existing BAN). The 'ORDER FLAG' dropdown is set to 'Select Order Flag'.

Order Flag

Order flags can be used to indicate either special handling of an order or to archive an open order that will never progress to closed or canceled. The values selected in the order are visible on the order, worklist and search result screens. The values in the Order Flag are editable from the Order or from the Worklist within the Work Queue.

The archive option will remove the order from the open orders on the worklist. In order to view or revive an archived order, go to the Order Flag field in the left panel of the Work Queue, select archive from the drop-down and then select the **Refine By** button. All archived orders that meet the search criteria will be displayed in the main panel worklist tab. If you wish to revive the archived order, deselect Archive from the Order Flag drop down within the main panel.

All other options in the Order Flag drop down will retain the order in the current state of opened, canceled or complete.

To add or remove a flag from an order:

Step 1: Go to the 1st header section of the order and select the Order Flag drop-down.

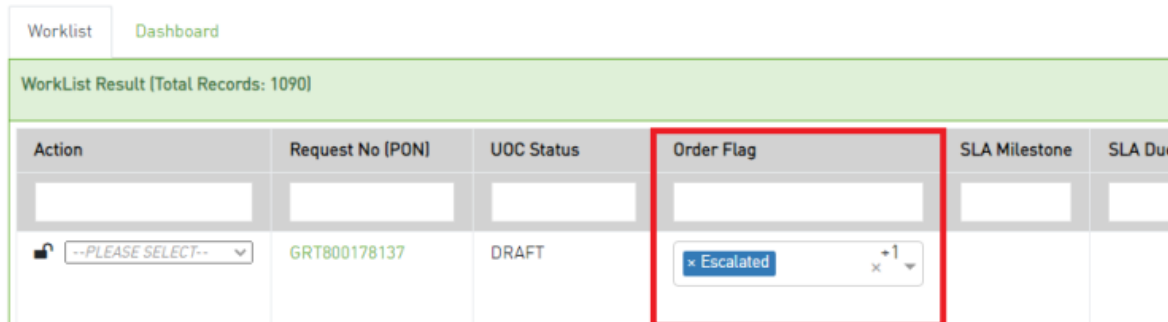
The screenshot shows the 'UOC UNIVERSAL' order details. The 'ORDER FLAG' dropdown is highlighted with a red box. Other fields include 'Fields are required', 'Submit', 'Save', 'Validate', 'More Actions', and 'Print'. The 'ORDER FLAG' dropdown is set to 'Select Order Flag'.

Step 2: Check flag(s) from the drop-down list of available flags to add a flag or uncheck the flag(s) from the drop-

down list to remove a flag.

To add or remove a flag from the worklist:

Step 1: Go to the Order Flag column and select the Order Flag drop down.



Step 2: Check the flag(s) from the drop-down list of available flags to add a flag or uncheck the flag(s) from the drop-down list to remove an order flag.

Enriching an Order

ICSC

Each product has an associated application assigned to it in the product catalog. When a product is selected on an order that has an associated application set in the ICSC module to auto derive the ICSC value:

- If only 1 ICSC value is associated to the selected trading partner, the ICSC value will default to that value on the order.
- If more than 1 ICSC value is associated to the selected trading partner, then the application will wait for fields that are dependent on the ICSC determination to be populated on the order. The ICSC field will contain the verbiage **Pending Auto Selection**. This shall indicate that user selection of an ICSC value is NOT required. For the ASR application, dependent fields are one of the following:
 - SALI:STATE field when the SALI:PI field is Y
 - ASR:ACTL (positions 5 & 6)
 - PRILOC (positions 6 & 7) when 1st position is C
- If the application cannot determine which ICSC value to select based on the population of the other dependent fields, then the ICSC field verbiage will change from **Pending Auto Selection** to **Select**. This shall indicate that the system is unable to derive the value for that field and the value must be selected manually by the user.
- If there is an ICSC section added to the order, the associated code for the order will be derived based on responses provided in the fields within that section.

NC/NCI/SECNCI

When a product name is selected on an order that has an associated NC/NCI/SECNCI table in the NC/NCI admin module, the associated codes for the order will be derived based on drop down selections.

on the product tab. If the values in the drop down on the product tab are selected based on mapping from the Universal tab, the field and values in the Universal tab must match exactly with the field and values in the drop downs on the product tab. The drop-down values are derived from the NC/NCIadmin module.

There shall be a NC/NCI/SECNCI section on the order. Within this section, questions shall be asked in order for the application to derive the correct codes. The questions asked will vary based on the product and how the table is set up in the Admin screen.

Note: If there is no NC/NCI/SECNCI table set up for a product and the NC/NCI/SECNCI fields are required for the order, the product in the product catalog must contain those fields. Contact your Catalog Administrator if any needed fields are missing on the order.

To populate the NC/NCI/SECNCI section, perform the following steps:

Step 1. Select a value from the first field drop down.

Step 2. As a value is selected, the remaining drop downs will be modified to only contain those values that are applicable.

Step 3. Select a value from the second field drop down. Fields go from left to right so the second field will be to the right of the first field.

Step 4. Again, the remaining drop downs will be modified to only contain those values that are applicable.

Step 5. In the order of the listed fields, continue to select a value in the remaining drop downs going from left to right and then to the next row.

The number of fields displayed in this section will vary.

Step 6. Once all the drop downs are selected, the application will auto populate the NC/NCI/SECNCI fields with the derived values.

Step 7. If an update is needed, just select a different value from any of the drop downs and the application will update the NC/NCI/SECNCI fields automatically based on the new selections.

End User

When End User Primary Location and/or End User Secondary Location is available on your order then it has been enabled as an order enrichment within the catalog for the product selected.

Additional address fields that are not part of the End User module may also be available within your order but will not be located in the same section with the address.

End User section from order enrichment additions or changes made shall be updated upon save or submit so the latest information is available for future orders that are created.

Note 1: Contact your Catalog Administrator if any needed fields are missing on the order.

Note 2: If the End User order enrichment section is not enabled and address fields are populated, the data will not add to or modify the End User module (End User screen from the Main Menu). The End User module gets updated either from the order enrichment section on the order or directly in the End User module itself.

Adding a New End User and/or Address

Field Name	Format	Description
End User		Select an existing End User or enter a new End User to be used for the order
End User ID		Enter the End User ID associated to a new EndUsername
Address		Select an existing address
Site ID		Enter the new Site ID associated to a new address
Address Line 1 Example: 123 MAIN ST N	Simplified Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SAPR - SANO - SASF - SASD - SASN - SATH - SASS
Address Line 2 Example: BLDG 1, FL 2, RM 202 Important: Field Designation/ Field Value group- ings must be commaseparated!	Simplified Address	Enter the new address demark details. Associated to the following fields on the ASRSend SALI record: - LD1/LV1 - LD2/LV2 - LD3/LV3
Street Number Prefix	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SAPR
Street Number	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SANO
Street Number Suffix	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SASF
Street Direction Pre- fix	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI

		record: - SASD
Street Name	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SASN
Street Type	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SATH
Street Directional Suffix	Standard Address	Enter the new address details. Associated to the following fields on the ASRSend SALI record: - SASS
City		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - CITY
State Example: NY		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - STATE
Zip Code		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - ZIP
Country		Enter the new address details.
Access Information		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - WKTEL
Latitude		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - LAT
Longitude		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - LONG
Working Telephone		Enter the new address details. Associated to the following fields on the ASRSend SALI record: - ACC
Primary Contact Name		Enter the new contact details.

		Associated to the following fields on the ASRSend SALI record: - LCON
Primary Contact Phone 1		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - ACTEL
Primary Contact Phone 2		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - AACTEL
Primary ContactEmail		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - LCON EMAIL
Secondary ContactName		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - ALCON
Secondary Contact Phone 1		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - ALCON TEL
Secondary Contact Phone 2		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - AALCON TEL
Secondary Contact Email		Enter the new contact details. Associated to the following fields on the ASRSend SALI record: - ALCON EMAIL

Perform the following steps to add a new end user **and** address:

The screenshot shows a form titled "End User Primary Location" with two tabs: "Simplified Address" (selected) and "Standard Address". Below the tabs, there are two rows of input fields. The first row has "End User:*" with a dropdown menu labeled "Select Existing End User Name" and a text field containing "NEW END USER". The second row has "End User ID:*" with a text field containing "NEWEU-1". Both text fields are circled in red. A "-OR-" separator is located between the two rows.

Step 1. In the **End User (Primary and/or Secondary Location)** section in the main panel, enter new end user name in the **End User** text field.

Step 2. In the **End User** section in the main panel, enter end user ID in the **End User ID** text field.

Step 3. In the **Site/Address** section in the main panel, enter site ID in the **Site ID** text field.

Step 4. In the **Site/Address** section in the main panel, enter address in the **Address Line 1** text field.

Step 5. In the **Site/Address** section in the main panel, enter city in the **City** text field.

Step 6. In the **Site/Address** section in the main panel, enter state in the **State** text field.

Step 7. In the **Site/Address** section in the main panel, enter zip code in the **Zip Code** text field.

Note: You can also enter details in other text fields which are optional.

Step 8. Once the order is **Saved** or **Submitted**, the new end user and address will be added to the End User module for future use.

Selecting an Existing End User and/or Address

Selecting an Existing End User:

The screenshot shows the 'End User Primary Location' section of a form. It has two tabs: 'Simplified Address' (selected) and 'Standard Address'. There are two rows of input fields. The first row is for 'End User:*' and contains a dropdown menu with 'Select Existing End User Name' and a text input field with 'ENTER END USER NAME'. The second row is for 'End User ID:*' and contains a text input field with 'ENTER END USER ID'. Red boxes highlight the dropdown menu and the 'End User ID' text input field.

Step 1 In the **End User (Primary and/or Secondary Location)** section in the main panel, select the existing end user in the **End User** drop-down field.

Step 2. The **End User ID** gets auto populated based on the existing End User.

Selecting an Existing Address for an existing End User:

The screenshot shows the 'End User Primary Location' section of a form, similar to the previous one. It has two tabs: 'Simplified Address' (selected) and 'Standard Address'. There are two rows of input fields for 'End User:*' and 'End User ID:*'. Below these is a 'SELECT PROVIDER' dropdown menu and a green 'Get SA/Quote' button. The bottom row is for 'Address:' and contains a dropdown menu with 'SELECT EXISTING ADDRESS' and a text input field with 'ENTER SITE ID'. A red box highlights the 'Address' dropdown menu.

Step 1 In the **End User (Primary and/or Secondary Location)** section in the main panel, select the existing end user in the **End User** drop-down field.

Step 2. The **End User ID** gets auto populated based on the existing End User.

Step 3. Select the existing address in the **Address** drop-down field.

Step 4. In the **Site/Address** sub section, the address and contact fields get auto populated with the latest information from the end user module (viewable by selecting the End User option in the main menu).

Modifying an Address of an Existing End User:

Site/Address Details:			
Address Line 1:*	<input type="text" value="12000 ANY DR"/>	Address Line 2:	<input type="text" value="BLDG 1"/>
City:*	<input type="text" value="ANY CITY"/>	State:*	<input type="text" value="VA"/>
Zip Code:*	<input type="text" value="20190"/>	Country:	<input type="text" value="US"/>
Latitude:	<input type="text" value="12.123456"/>	Longitude:	<input type="text" value="12.123456"/>
Access Information:	<input type="text" value="ENTER ACCESS INFORMATION"/>	Working Telephone:	<input type="text" value="999-999-9999"/>
Contacts Details:			
Primary Contact Name:	<input type="text" value="MANAGER ON DUTY"/>	Primary Contact Phone 1:	<input type="text" value="888-555-1111-_____"/>
Primary Contact Phone 2:	<input type="text" value="999-999-9999-9999"/>	Primary Contact Email:	<input type="text" value="MGR@HD.COM"/>
Secondary Contact Name:	<input type="text" value="ENTER SECONDARY NAME"/>	Secondary Contact Phone 1:	<input type="text" value="999-999-9999-9999"/>
Secondary Contact Phone 2:	<input type="text" value="999-999-9999-9999"/>	Secondary Contact Email:	<input type="text" value="EXAMPLE@EMAIL.COM"/>
Remark Details:			
Note:	<input type="text" value="ENTER NOTES HERE"/>		

Perform the following steps to modify address details of an existing end user:

Step 1. In the **End User (Primary and/or Secondary Location)** section in the main panel, select the existing end user in the End User drop-down field.

Step 2. Select the existing address from the **Address** drop-down field.

Step 3. In the **Site/Address Details, Contacts Details and/or Remark Details** sections, modify the address information by over-writing existing text, deleting existing text and/or adding missing text in any of the fields.

Step 4. Once the order is **Saved** or **Submitted** with the modified address, the existing address stored will be modified in the End User module automatically and will be available for future use.

Creating a New Address for an existing end user:

Step 1 In the **End User (Primary and/or Secondary Location)** section in the main panel, select the existing end user in the **End User** drop-down field.

Step 2. The **End User ID** gets auto populated based on the existing End User.

Step 3. Enter site ID in the **Site ID** text field for the new address you will be providing.

Step 4. In the **Site/Address Details** section, enter the address in the **Address Line 1** text field.

Step 5. In the **Site/Address Details** section, enter the city in the **City** text field.

Step 6. In the **Site/Address Details** section, enter state in the **State** text field.

Step 7. In the **Site/Address Details** section, enter zip code in the **Zip Code** text field.

Note: You can also enter details in other text fields that are optional.

Step 8. In the **Contact Details** section, enter contact information for the address location in any of the text fields.

Step 9. Once the order is **Saved** or **Submitted**, the new address will be added to the existing end user in the End User module for future use.

Validation Errors

After selecting the Validate button on an order in either the Universal or Product tab, if any required fields are not populated or there is a business rule error associated to a field, the errors will be displayed on the top of the order.

(*) Fields are required

Universal Order Errors

Requested By Email : is required field!

Universal Order Product Order Order History Tasklist Notes

ACCESS UNIVERSAL DEMO

Customer Order ID

ORDER DETAILS

You can select the error to be brought to the specific field associated with the error in order to correct it.

If there are no validation errors after selecting the Validate button, then a “Validation successful” message will be displayed advising that all required fields are populated and there are no business rule errors that were found.

▼

(*) Fields are required

Validation successful.

Universal Order Product Order Order I

Note: You may still submit your order in UOC even if it contains an error and, while this is not advised, it is permissible and may result in the status of BR ERROR if any business rules are found after submission.

Help Text

Requested Due Date

GUI ALIAS NAME: Requested Due Date

ACTIVITY: Install, Change, Disconnect, Record

DEFAULT VALUE: NONE

REQUIRED: Yes

DESCRIPTION:

Identifies the customer's desired due date.

NOTE 1: The actual due date may be different from that desired because of factors such as the availability of facilities and the quantity, complexity, and impact on local service of the circuit(s) involved.

NOTE 2: On disconnect requests, this date represents the date billing is to stop on the involved circuit(s) and can be no earlier than the date the request is received by the provider.

NOTE 3: When different due dates are required, these dates are stipulated using a separate request for each desired due date. For example, a total of 50 circuits are desired and the customer wants them at a rate of 10 per day. Therefore, five ASR forms may be submitted stipulating this requirement.

NOTE 4: When multiple ASRs are associated with one Translation Questionnaire, all DDDs must be identical.


Close

In order to see help text for a given field on an order, click on the field name and a pop-up will appear with any available help text.

To close the box, click the Close button at the bottom right corner of the pop-up.

Back


Allows the user to go back to the previous screen and retain previous selections.

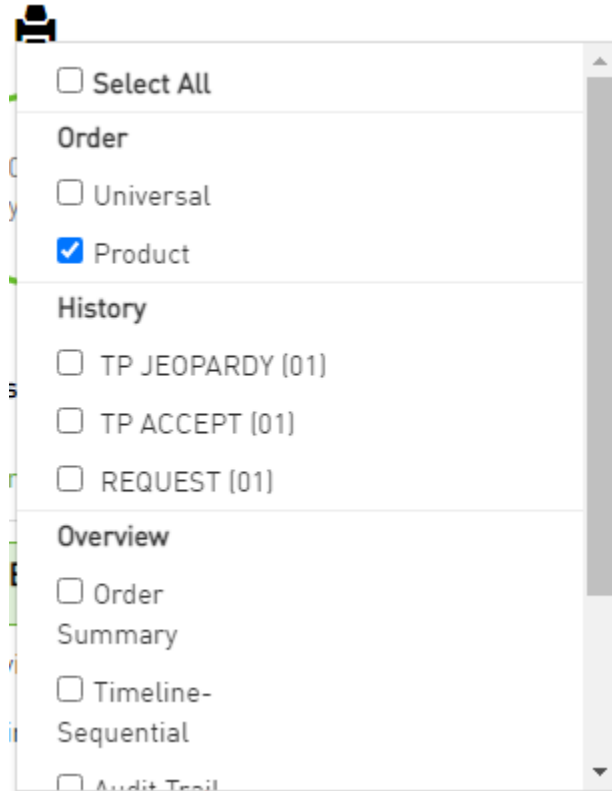
When the Back Icon  is selected, the user will go back to the previous screen which shall retain any previous Refine By selections that were made in the left panel.

Note: Selection from the main panel to another screen will take the user to the screen in the default landing page and not retain any Refine By selections previously made.

Print

Allows an order or response to be printed.

When the Printer Icon  is selected, a drop down with check boxes will appear. Default selection shall be associated to the tab that is currently being viewed when the print button is selected.




When an item is checked, it shall be included for printing. You may modify the default selection.

When you are done selecting the check boxes for item to be included in the printing, select the **Done** button at the bottom.

A pop-up will appear with items to be included for printing. Select either **Print** or **Generate PDF** (can be used for saving or printing) buttons at the bottom of the screen. You may also use the **Close** button to remove the pop up.

Lock


Notifies the user if another user is working on the order. The lock icon is visible from the 1st column of the work queue and search order screen as well as the top right of the order screen.

When the Lock Icon is showing as locked  then another user is editing the order and that order is locked from being worked by any other user.

If you mouse over the icon when it is showing as locked, the user who is editing the order is displayed:



UOC will automatically unlock the order when the user is no longer in the order. However, the user that has the order locked can unlock that order manually by selecting the lock icon from the work queue or search result screen.

When the Lock Icon is showing as unlocked  then no other user is editing the order and that order can be edited.

ASR View

The order format in UOC can vary widely based on how the universal and/or product is set up in the Admin module. Regardless of how the buyer view looks, trading partners will still expect the receipt of orders in a specific format, such as ASOG, LSOG, MEF, TM Forum, etc. UOC converts the order to the seller format in the background. For ASOG compliant (ASR) orders, after saving or submitting, ASR View will be available and will provide a snapshot of the ASOG/ASR format sent to the trading partner. This shall make it easier for a user to contact the Trading Partner as they can both see the order in the same format.

If applicable, once an order is saved or submitted, ASR View will be available in the **More Actions** drop-down on the order or the **Action** drop-down on the work queue and search result screen.

Version

Draft orders shall be saved with version 00. On the initial submission of an order, the version shall be populated with 01.

All subsequent submissions will be incremented by 1 (02, 03, 04, etc) if the current version does not get rejected by the seller. Some orders that are rejected by the seller may also be incremented by 1 based on standard practices such as broadband.

The version field is auto generated in the background and is visible from the order screen in the Order Summary section of the left panel. It is also visible from the Worklist and Search Result Main Panel.

Some users have an option to override the system generated value when the User Override section is visible in the left panel of an order. This is role based.

Combo Order

Since some providers may not support combo Switched Ethernet ordering, UOC can split the combination order into two separate child orders during submission to the seller.

In the Admin screen under TP Management, if the field “Switched Ethernet Combination Ordering Not Supported” is checked in the TP Administration module then that indicates the trading partner does not support the combo process.

If a switched Ethernet combination order is created for a trading partner that is flagged as not supporting the combination process, UOC will automatically separate the parent combo order into two child orders – 1 Port order

(UNI or ENNI) and 1 EVC order – upon submission to CH. Otherwise the combo order will be retained as combo upon submission to CH.

If the combo order needs to be split into two orders, the following will be converted after submission to the seller:

1. For the Port Order:

Any other fields not noted below, will be sent on the Port order exactly as populated by the user on their order.

Field Changes to support individual child order processing	Notes
The ASR form EVCI field will be changed from “B” to blank	The EVC Form will not be associated to the child Port (UNI or ENNI) order
<p>PON value:</p> <p>Since the parent PON value in UOC cannot be used for both the Port and EVC child orders, the parent PON will be modified for the Port to differentiate it from the EVC.</p>	<p>The child PON numbers for both the Port and EVC will be provided in the notes tab of the order for your reference when reaching out to the trading partner</p> <p>GO To ASR will take the user to both the Port and EVC orders in CH and user will need to select which one to view</p>
<p>The ASR form DDD value:</p> <p>Disconnect order: The ASR form DDD field will be changed to the PORT Confirmed Due Date + any due date delta, if available.</p> <p>Otherwise parent value will be retained</p>	<p>The Due Date Delta is a field in the Admin screen under TP Management that works in conjunction with the “Switched Ethernet Combination Ordering Not Supported” field in the TP Administration module.</p>
<p>The ASR form RPON value:</p> <p>Disconnect order: The ASR form RPON field will be set to the EVC Order PON value.</p> <p>Otherwise parent value will be retained</p>	

2. For the EVC Order:

All other fields not noted below, will be sent on the EVC order exactly as populated by the user on the combo order.

Field Changes in ClearingHouse (CH) to support individual child order processing:	Notes
The ASR form EVCI field will be changed from “B” to “A”	SES, SALI and NAI forms will not be associated to the child EVC order.

<p>PON value:</p> <p>Since the parent PON value in UOC cannot be used for both the Port and EVC child orders, the parent PON will be modified for the EVC to differentiate it from the Port</p>	<p>The child PON numbers for both the Port and EVC will be provided in the notes tab of the order for your reference when reaching out to the trading partner</p> <p>GO To ASR will take the user to both the Port and EVC orders in CH and user will need to select which one to view</p>
<p>The ASR form REQTYP field will become “SD”</p>	<p>The REQTYP value on the parent order will be associated to the Port only.</p>
<p>The ASR form SEI field will become blank</p>	<p>The SEI value on the parent order will be associated to the Port only.</p>
<p>The ASR form QSA field will become blank</p>	<p>The QSA value on the parent order will be associated to the Port only.</p>
<p>RTR value will be populated as follows:</p> <p>If “S” on parent, then will become “F” on EVC child</p> <p>If “T” on parent, then will become “P” on EVC child</p> <p>Otherwise, parent value will be retained</p>	
<p>The ASR form CNO field for seller AT&T will be populated with 12 Z’s.</p>	
<p>The ASR form DRC field will become blank</p>	<p>The DRC value on the parent order will be associated to the Port only.</p>
<p>The ASR form CKR field will become blank</p>	<p>The CKR value on the parent order will be associated to the Port only.</p>
<p>The ASR form ECCKT field will become blank</p>	<p>The ECCKT value on the parent order will be associated to the Port only.</p>
<p>The ASR form ACTL field will become blank</p>	<p>The ACTL value on the parent order will be associated to the Port only.</p>
<p>The ASR form SPEC field will become blank</p>	<p>The SPEC value on the parent order will be associated to the Port only.</p>
<p>The ASR form PNUM field will become blank</p>	<p>The PNUM value on the parent order will be associated to the Port only.</p>
<p>The ASR form VTA field will become blank</p>	<p>The VTA value on the parent order will be associated to the Port only.</p>
<p>The ASR form DDD value:</p> <p>Install order: The ASR form DDD field will be changed to the PORT Confirmed Due Date + any due date delta, if available.</p> <p>Otherwise, parent value will be retained</p>	<p>The Due Date Delta is a field in the Admin screen under TP Management that works in conjunction with the “Switched Ethernet Combination Ordering Not Supported” field in the TP Administration module.</p>
<p>The ASR form RPON value:</p> <p>Install order: The ASR form RPON field will be set to the PORT Order PON value.</p> <p>Otherwise, parent value will be retained</p>	
<p>The EVC form, AUNT field will become blank</p>	<p>It is important to have the AUNT field populated on the parent combination order in UOC at one UREF for proper processing.</p>

<p>The EVC form RUID value:</p> <p>Install order: The EVC form RUID field at same UREF that AUNT field is populated on Parent order in UOC will get populated with the ECCKT returned from the FOC on the Port child order. There will be a place holder in the RUID field with the verbiage “UPDATE FROM PORT CNF” until the FOC is returned.</p> <p>Disconnect or Record order: The EVC form RUID field at same UREF that AUNT field is populated on Parent order in UOC will get populated with the ECCKT value from the parent order if blank.</p> <p>Otherwise, parent value will be retained</p>	
<p>The EVC form EVCSP value:</p> <p>Install order: The EVC form EVCSP field at same UREF that AUNT field is populated on Parent order in UOC will get populated with the ESP returned from the FOC on the Port child order.</p> <p>Otherwise, parent value will be retained</p>	

UOC will manage the child orders and distribution to the trading partners using the proper sequence:

For instance, on an installation, the Port child order will be sent to the Trading Partner first. Once the ECCKT value, ESP value and DD value are returned to the FOC, they will be updated on the EVC child order, and that order will then be sent to the Trading Partner.

UOC shall display timeline and work queue/search screen statuses based on both child orders.

“Go To ASR” shall take the user to CH displaying both child PONs and a selection by the user will be required in order to view each order separately.

Cloning an Order

Cloning makes an exact duplicate of an existing request minus the Request Number (PON) and Requested Due Date (DDD) fields which shall remain blank unless there is an order enrichment module set to auto populate those fields. The cloned order can subsequently be edited to meet the requirements of a new one. Cloning (aka copying) orders allows for quick placement of orders since a new order does not have to be created from scratch.

To clone an order, perform the following steps:

Step 1. In the Action column on either the **Worklist** or **Search Order** page for the selected order, click **Clone**.

A. You will be brought to the Create Order screen.

Step 2. On the Order, add or change information that is unique to the new order in the left and main panel. Be sure to enter the key identifying data for the new order in the left and main panel.

When an order is complete, click **Submit**.

Hold for Approval

An order can be moved to a Hold for Approval status if it is decided that a review is necessary prior to submission to the Trading Partner (TP).

The order will not be sent to the trading partner until a user with approver permission reviews and approves the request in UOC.

When Status is HOLD FOR APPROVAL and a user with approval permission selects action “Review for Approval” in the action drop down on the worklist or search result screen then they will be brought to the order screen in approval mode.

- The order screen shall have an **Approve & Submit** button which shall function the same as the SUBMIT button by validating and submitting the order. The Approve & Submit button shall only be available when Review for Approval is selected from the action drop down.
- There shall not be a submit button on the order when in approval mode.
- The approver may edit the request prior to approving.
- Once the Approve & Submit button is selected then the order shall continue processing and, if it does not contain any errors, it will be submitted to the Trading Partner.

There are two ways an order can get moved to Hold for Approval:

1. **Product based:** If Hold for Approval is selected on the Admin screen in the left panel against the Product, any order submitted by a user associated to that product where the hold for approval criteria is met will have the status moved to Hold for Approval accordingly. The following options are available for Hold for Approval:
 - A. **All Versions** – All versions of the order will stop in Hold for Approval
 - B. **Initial Version** – Only the initial order version submitted will stop in Hold for Approval
 - C. **More Hold for Approvals**
 - **Disconnect Before Term Expiration** – If the term expiration date as noted in the service module for that circuit is greater than the buyer requested due date of the disconnect order then the order will stop in Hold for Approval
 - **Cancel After FOC** – If the order is being canceled post FOC and charges may be incurred then the order will stop in Hold for Approval
2. **User based:** If the role associated to a user indicates either hold for approval for all versions or hold for approval for initial version only then, regardless of the product-based setting, after user submits any order, the status will move to Hold for Approval accordingly.

Status

The status values are the same for all products and services within UOC regardless of the product selected.

From either the worklist main panel or the search order main panel result screen, the latest status shall be visible for an order.

To view the status history of an order you must be in the existing order. You can view the history from either the audit trail in the left panel or the timeline on the top of the main panel.

The status values for UOC Buy and Sell are as follows ((M) = Marketplace Buyer):

UOC Buy Status	UOC Sell Status	Displayed when
DRAFT		<ul style="list-style-type: none"> Request has been created in UOC Request has not been submitted by the user to the Trading Partner Request has been saved by the user in UOC
SUBMITTED		<ul style="list-style-type: none"> Initial Request has been submitted by the user in UOC <p>Request is pending the Neustar gateway/validation engine order creation response</p>
SUBMITTED (CANCEL)		<ul style="list-style-type: none"> Request has been submitted by the user in UOC for a cancel <p>Request is pending the Neustar gateway/validation engine order creation response</p>
SUBMITTED (MODIFY)		<ul style="list-style-type: none"> Request has been submitted by the user in UOC for a modification <p>Request is pending the Neustar gateway/validation engine order creation response</p>
CREATE FAIL		<ul style="list-style-type: none"> Request has been submitted Requested has failed to create (convert to TP format) in backend database <p>Contact Neustar for Failure reason</p>

<p>BR ERROR</p>		<ul style="list-style-type: none"> Request has been submitted <p>Requested has failed business rule validations for industry compliance and/or seller specific business rules</p>
<p>HOLD FOR APPROVAL</p>		<ul style="list-style-type: none"> Request has been submitted in UOC Version has not been sent to the Trading Partner <p>Request is on hold pending Approval</p>
<p>TP SENT SENT (M)</p>	<p>RECEIVED</p> <p>RECEIVED (CANCEL)</p> <p>RECEIVED (MODIFY)</p>	<p>Initial order has been successfully sent to the Seller (Trading Partner)</p> <p>Cancel order has been successfully sent to the Seller (Trading Partner)</p> <p>Modified order has been successfully sent to the Seller (TP)</p>
<p>TP ACCEPT ACCEPT (M)</p>	<p>ACCEPTED</p>	<ul style="list-style-type: none"> An initial request or subsequent version has been submitted to the Trading Partner Trading Partner has accepted the version <p>Note: This equated to acknowledgement in CH</p>
<p>TP REJECT REJECT (M)</p>	<p>REJECTED</p>	<ul style="list-style-type: none"> An initial request or subsequent version has been submitted to the Trading Partner Trading Partner has rejected the version <p>Note: This equated to Negative Acknowledgement in CH</p>
<p>TP SITE READINESS SITE READINESS (M)</p>	<p>SITE READINESS</p>	<ul style="list-style-type: none"> Trading Partner has Accepted request Trading Partner has responded with site readiness information for the site location

<p>TP ERROR ERROR (M)</p>	<p>ERROR</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has sent notification to the customer regarding an error condition that may require a modification • This may also include a pre-confirmed jeopardy condition in addition to errors <p>Note: This equated to Clarification – Error in CH or Pre-FOC Jeopardy Error in CH</p>
<p>TP ADDRESS ERROR ADDRESS ERROR (M)</p>	<p>ADDRESS ERROR</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has sent notification to the customer regarding an address error that may require a modification <p>Note: This equated to Address Modification in CH</p>
<p>TP CLEAR CLEAR (M)</p>	<p>CLEARED</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has sent notification to the customer that their request is clear of any error or jeopardy conditions <p>Note: This equated to Clear in CH</p>
<p>TP CONSTRUCTION CONSTRUCTION (M)</p>	<p>CONSTRUCTION</p>	<ul style="list-style-type: none"> • Trading Partner has Accepted request • Trading Partner has responded with construction Information
<p>TP PRE JEOPARDY PRE JEOPARDY (M)</p>	<p>PRE JEOPARDY</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has sent notification to the customer regarding a pre confirmed (FOC) jeopardy condition that may require a modification <p>Note: This equated to Pre Foc Jeopardy in CH</p>

<p>TP CONFIGURED CONFIGURED (M)</p>	<p>CONFIGURED</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has responded back with configuration information
<p>TP CONFIRMED CONFIRMED (M)</p>	<p>CONFIRMED</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has responded back with order/circuit details <p>Note: This equated to Confirmation in CH / aka FOC or Firm Order Confirmation</p>
<p>TP DLR DLR (M)</p>	<p>DLR</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has responded back with design information <p>Note: This equated to DLR in CH</p>
<p>TP PROVISIONING PROVISIONING (M)</p>	<p>PROVISIONING</p>	<ul style="list-style-type: none"> • Trading Partner has Accepted the request • Trading Partner has responded with provisioning Information
<p>TP PTA PTA (M)</p>	<p>PTA</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has responded back with test acceptance information <p>Note: This equated to PTA in CH</p>
<p>TP JEOPARDY JEOPARDY (M)</p>	<p>JEOPARDY</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has sent notification to the customer regarding a post confirmed (FOC) jeopardy condition that may require a modification <p>Note: This equated to Jeopardy in CH</p>
<p>TP COMPLETE COMPLETE (M)</p>	<p>COMPLETED</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request

		<ul style="list-style-type: none"> Trading Partner has responded back that request is complete Note: This equated to Complete in CH
CANCELED	BUYER CANCELED	<ul style="list-style-type: none"> Trading Partner has previously Accepted the request Customer has canceled their order Trading Partner has Accepted the request to cancel <p>Note: This equated to Cancelled in CH</p>
TP CANCELED CANCELED NOTIFY (M)	CANCELED	<ul style="list-style-type: none"> Trading Partner has previously Accepted the request order Trading Partner has responded that they canceled the request. <p>Note: This equated to Provider Cancelled in CH</p>
(N/A)	(N/A)	CH = Sent Service Request Inquiry
(N/A)	(N/A)	CH = Service Request
(N/A)	(N/A)	CH = Service Request Confirmation

Supplements

On the initial submission of an order the SUP field shall be blank. If the initial submission was rejected by the seller and the order is sent back to the seller with the same version as the initial version, then the SUP field shall remain blank.

On all subsequent submissions of an order, the SUP field shall be populated with the applicable SUP value 1 (CANCEL), 2 (DUE DATE CHANGE), 3 (POST-FOC CHANGE) or 4 (PRE-FOC CORRECTION) based on:

SUP Type	Condition
2	If DDD changes. The following fields may or may not also be changed with the DDD: <ol style="list-style-type: none"> 1. ASR:Remarks 2. ASR:EXP 3. ASR:EDA <p>AND no other field is changed.</p>
3	Otherwise, if previous or current status is TP CONFIRMED
4	Otherwise, if no previous and no current status is TP CONFIRMED

The SUP field is auto generated in the background and is visible from the order screen in the Order Summary section of the left panel. It is also visible from the Worklist and Search Result Main Panel.

Some users have an option to override the system generated value when the User Override section is visible in the left panel of an order. See User Override in chapter 4/this chapter for more details.

Modifying an existing order

Perform the following steps to modify an existing order:

- Step 1. Go to either the Search or Work Queue screen from the top navigation bar.
- Step 2. From the Search Result or Worklist Main Panel, select the existing order via the Request No (PON) hyperlink.
- Step 3. From the order screen, modify the order as needed.
- Step 4. Validate and then re-submit the order.

Note: The application shall auto populate the Version and SUP fields as needed.

Canceling an existing order



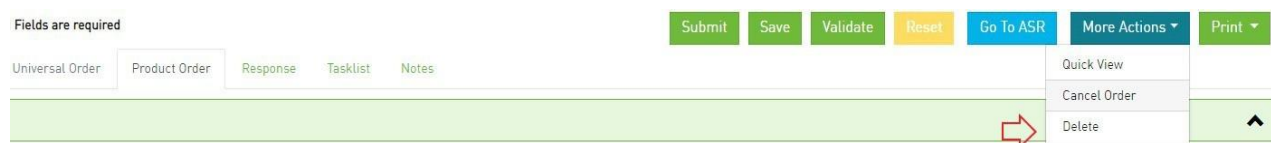
Perform the following steps to cancel an order:

- Step 1. Find the order in the **Work Queue** or **Search Order** screen.
- Step 2. Click the **Request No (PON)** hyperlink of the order that you want to cancel.
- Step 3. From the Order Screen, click **More Actions** button and click **Cancel Order**.
- Step 4. On the Cancel Order pop-up screen, enter a value in the Remarks field and confirm the cancel action in the pop-up by selecting **Yes**.

UOC will apply a SUP Type 1 to the order and submit the cancel to the Trading Partner.

Deleting an existing order

An order that has never been sent (TP SENT) to a trading partner can be deleted otherwise you must either archive or cancel the order instead.



Perform the following steps to delete an order:

Step 1. Find the order in the **Work Queue** or **Search Order** screen.

Step 2. Click the **Request No (PON)** hyperlink of the order that you want to delete.

Step 3. From the **Order** Screen, click **More Actions** button and click **Delete**.

Step 4. Confirm the delete action in the pop-up by selecting **OK**. After confirmation, UOC will delete the order.

Note: There is also an option to delete the order directly from the Work Queue or Search Order screen in the action drop down.

Important! The order will be deleted in UOC only. The order will still exist in the Clearinghouse so the PON number cannot be re-used.

Change Order

Once an install order is complete, the circuit is then considered active, and a change order can be placed against it as necessary. There are several ways to create a change order:

- To have UOC create a change order

If you want UOC to set up a change order on an active circuit based on user selections by retrieving order and response data to form the shell of the change order perform the following steps:

Step 1. Select **Change Order** in the action drop down on either the Worklist or Search Result screen;

OR

Select the **Change Order** button in the top right of the Circuit Insights detail screen;

OR

Select the **More Actions** button in the top right of any order and then select **Change Order**.

Step 2. In the pop-up, go to the section **Select the Circuit(s) to be Changed** and select the radio button for circuit(s) to be changed.

Step 3. In the pop-up, stay in the section **Select the Circuit(s) to be Changed** and add the REF NUM value for the circuit(s) to be changed. Note: REF NUM will be auto populated with 0001 if only one physical and/or one virtual circuit is displayed.

Step 4. In the pop-up, go to the section **Select Product Catalog and Reference PON for Change Order** and select the radio button for which request number (PON) the field values shall be taken from to create the change order.

Step 5. In the pop-up, stay in the section **Select Product Catalog and Reference PON for Change Order** and select which product catalog shall be used to create the change order.

Step 6. Select the **Create** button to continue with the Change Order or select the **Cancel** button to exit without creating a change order.

Step 7. If the Create button was selected in step 6, the change order will be created in UOC. Modify the order for the changes needed, add a requested/desired due date and request number/PON.

Step 8. Review and validate the order for accuracy and then, when ready, hit the **Submit** button.

Change Order

Select the Circuit(s) to be Changed:*

	Customer Service ID	Service Status	Seller Circuit Id	Seller Virtual Circuit Id	Ref Num
<input type="checkbox"/>		Active	00.KFGD.404013..GRT		0000
<input type="checkbox"/>		Active		00.VLPX.404013..GRT	0000

Select Product Catalog and Reference PON for Change Order:*

	Product Catalog	Customer Order ID	UOC Order ID	Request Number	UOC Status
<input type="radio"/>	SELECT	C-FINV-DEMO-02	NSRDUOC-N01133891	FINV-ASR-DEMO-02	TP COMPLETE

- To create a change order from any existing order:

If you want to set up a change order manually from a previously created order in UOC perform the following steps:

Step 1. Find the existing order that you want to replicate for the change order in either the work queue or search result screen. Note: Only the order information on the Universal and/or Product tab will be cloned to the new order.

Step 2. Select **Clone** in the action drop down on either the Worklist or Search Result.

Step 3. From the order screen, change the activity field in the left panel to **Change**.

Step 4. Modify the order as needed.

Step 5. Review and validate the order for accuracy and then, when ready, hit the **Submit** button.

Note: See section [“Cloning an Order”](#) for more details.

- To create a change order from scratch

If you did not create the install order directly in UOC and the service module does not contain the circuit you wish to change but you need to issue a change order in UOC perform the following steps:

Step 1. Select **Create Order** from the main menu.

Step 2. Make selections in the left panel including the selection of **Change** in the Activity drop down.

Step 3. Fill out all fields in the main panel that are needed for the existing circuit to be changed.

Step 4. Review and validate the order for accuracy and then, when ready, hit the **Submit** button.

Disconnect Order

Once an install order is complete, the circuit is then considered active and a disconnect order can be issued against it as necessary. There are several ways to create a disconnect order:

To have UOC create a disconnect order:

If you want UOC to set up a disconnect order on an active circuit based on user selections by retrieving order and response data to form the disconnect order perform the following steps:

Step 1. Select **Disconnect Order** in the action down on either the Worklist or Search Result screen;

OR

Select the Disconnect Order button in the top right of the service module detail screen;

OR

Select the **More Actions** button in the top right of any order and then select **Disconnect Order**.

Step 2. In the pop-up, go to the section **Select the Circuit(s) to be Changed** and select the radio button for which circuit(s) are to be disconnected.

Step 3. In the pop-up, stay in the section **Select the Circuit(s) to be Changed** and add the REF NUM value for the circuit(s) to be disconnected. Note: REF NUM will be auto populated with 0001 if only one physical and/or one virtual circuit is displayed.

Step 4. In the pop-up, go to the section **Select Product Catalog and Reference PON for Disconnect Order** and select the radio button for which request number (PON) the field values shall be taken from to create the disconnect order.

Step 5. In the pop-up, stay in the section **Select Product Catalog and Reference PON for Disconnect Order** and select which product catalog shall be used to create the disconnect order.

Step 6. Select the **Create** button to continue with the Disconnect Order or select the **Cancel** button to exit without creating a disconnect order.

Step 7. If the Create button was selected in step 6, the disconnect order will be created in UOC. Add a requested/desired due date and request number/PON.

Step 8. Review and validate the order for accuracy and then, when ready, hit the **Submit** button.

Disconnect Order

Select the Circuit(s) to be Changed:*

<input type="checkbox"/>	Customer Service ID	Service Status	Seller Circuit Id	Seller Virtual Circuit Id	Ref Num	PO
<input type="checkbox"/>		Active	00.KFGD.404013..GRT		<input type="text" value="0000"/>	FIN
<input type="checkbox"/>		Active		00.VLPX.404013..GRT	<input type="text" value="0000"/>	FIN

Select Product Catalog and Reference PON for Disconnect Order:*

<input type="radio"/>	Product Catalog	Customer Order ID	UOC Order ID	Request Number	UOC Status
<input type="radio"/>	UOC-Q SW ETHERNET COMBO TERMI	C-FINV-DEMO-02	NSRDUOC-N01133891	FINV-ASR-DEMO-02	TP COMPLETE

To create a disconnect order from any existing order

If you want to set up a disconnect order manually from a previously created order in UOC perform the following steps:

Step 1. Find the existing order that you want to replicate for the disconnect order in either the work queue or search result screen. **Note:** Only the order information on the Universal and/or Product tab will be cloned to the new order.

Step 2. Select **Clone** in the action drop down on either the Worklist or Search Result.

Step 3. From the order screen, change the activity field in the left panel to **Disconnect**.

Step 4. Modify the order only if needed.

Step 5. Review and validate the order for accuracy and then, when ready, hit the **Submit** button.

Note: See section [“Cloning an Order”](#) for more details.

To create a disconnect order from scratch

If you did not create the install and/or change orders directly in UOC and the service module does not contain the circuit, you wish to disconnect but you need to issue a disconnect order in UOC perform the following steps:

Step 1. Select **Create Order** from the main menu

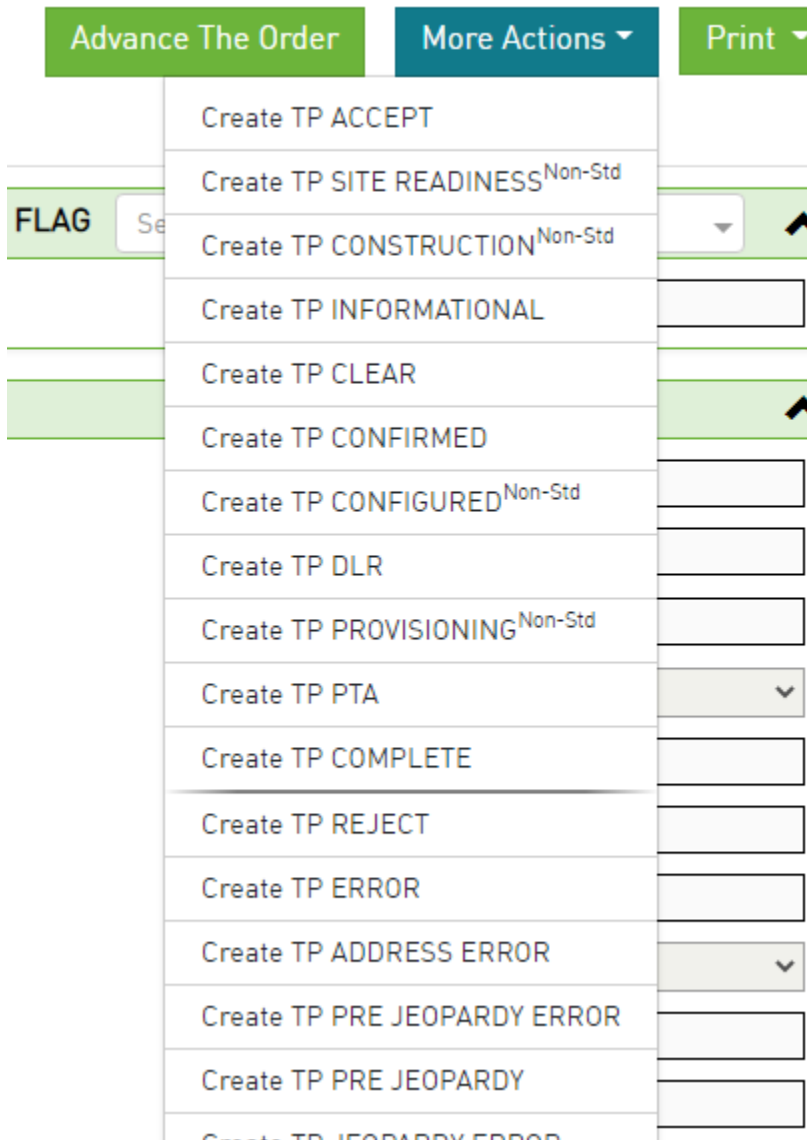
Step 2. Make selections in the left panel including the selection of **Disconnect** in the Activity drop down

Step 3. Fill out all fields in the main panel that are needed for the existing circuit to be disconnected.

Step 4. Review and validate the order for accuracy and then, when ready, hit the **Submit** button.

Response Creation

In a buyer domain (non-marketplace), testing users may need to issue responses against orders to progress it for testing purposes, etc. In a seller domain, it may be a user’s job function to issue responses against orders. In any case and where this function is needed, UOC offers certain users, based on user role, the ability to issue responses against orders.



In a buyer domain, from the work queue or search result screen:

Step 1: Find the Request No (PON) that you want to issue a response against.

Step 2: Go to the Action drop-down and select **Create Response**. You are brought to the order screen.

Step 3: Review the order details.

Step 4: Go to the **More Actions** button and select the appropriate response. Available responses may differ based on the order. Note: Responses are available from the **More Actions** drop-down based on the **Create Response** selection. If you do not see responses listed then you are not in the Create Response mode to issue a response.

Step 5: Fill out the response with the appropriate values for the order.

Step 6: Click the **Validate** button to validate the response values.

Step 7: Click the **Submit** button to send the response back to the buyer. The response is then stored in the Order History tab of the order.

In a seller domain, from the work queue or search result screen:

Step 1: Find the Request No (PON) that you want to issue a response against.

Step 2a: Go to the Action drop-down and select **Create Response**. You are brought to the order screen.

Step 2b: Alternate path option → Click the **Request No (PON)** hyperlink. You are brought to the order screen. Select **Create Response** button.

Step 3: Review the order details.

Step 4: Go to the **More Actions** button and select the appropriate response. Available responses may differ based on the order. Note: Responses are available from the **More Actions** drop-down based on the **Create Response** selection. If you do not see responses listed then you are not in the Create Response mode to issue a response.

Step 5: Fill out the response with the appropriate values for the order.

Step 6: Click the **Validate** button to validate the response values.

Step 7: Click the **Submit** button to send the response back to the buyer. The response is then stored in the Order History tab of the order.

Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Validate**. Action buttons that are unavailable are dimmed/disabled. Action buttons are located in the top right main panel of a screen if applicable.

Create Response

UOC supports seller response creation.

Sunny and rainy-day responses are separated by a divider to easily locate the response needed.

The sunny day responses that progress an order are located in the top section of the **More Actions** drop down. Beneath the sunny day responses, are the rainy day/error type of responses.

The following actions are supported for creation of a response:

! Important: You may not see all the options noted below in every drop down. Options vary per order.

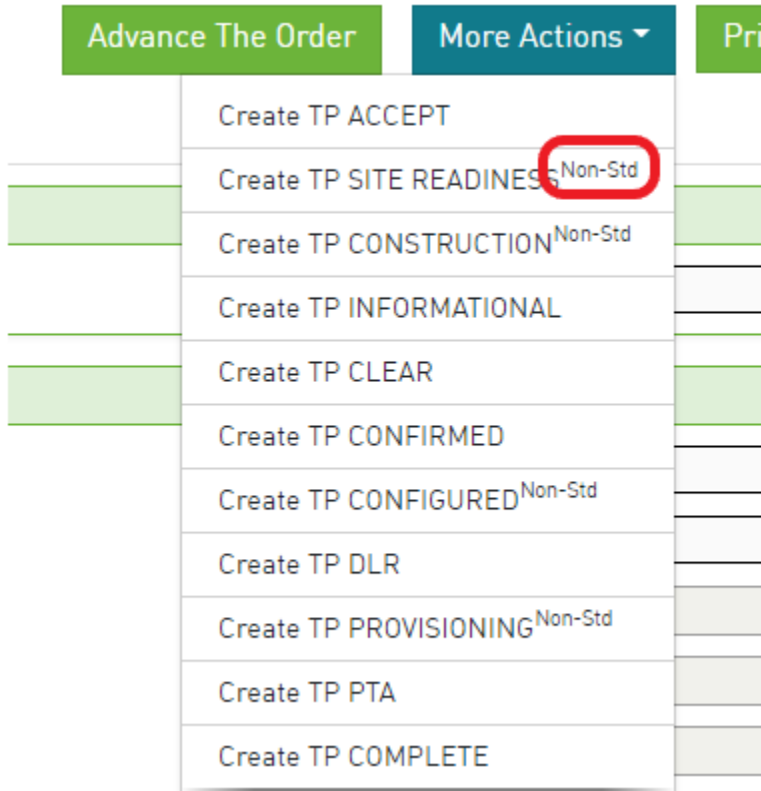
Button	Sub Menu	Description
Create Response		Allows a user to create a new response from the More Actions drop down. Response options will load in the More Actions drop down only when Create Response is selected.
Submit		Allows a response to be submitted to the trading partner/buyer.
Save		Allows a response to be saved in a draft status and not submitted to the trading partner/buyer.
Validate		Validates against business rules and returns errors on the UOC response.
More Actions	ASR View	Allows user to view order data that is being sent to the trading partner in the trading partner format when that format is industry standard for ASOG.
	API JSON	Allows user to view the order via JSON format. Buyer: Minimal payload (less defaults, enrichment, etc) needed from the customer on an order. Seller: Minimal payload needed from the seller for a response. (Future implementation)
	Full JSON	Allows user to view the order via full JSON format Buyer: Full payload (including defaults, enrichments, etc) available from the customer. Seller: Full payload available from the seller for a response.
	Customer API	Allows user to view the order data that was sent by customer via API Allows user to view the response data that was sent by the seller via API
	Go To ASR	Allows user to view an ASR order in the ClearingHouse (CH). User must be in edit mode on the order to see this option. Note: ASR View option in UOC provides same view as ASR in CH
	Create TP ACCEPT	<ul style="list-style-type: none"> Applicable for each new order version received Advises the buyer if their order version has been accepted by the seller for processing Note: On receipt of each new order version, the order is reviewed for determination if TP ACCEPT or TP REJECT will be applied.
	Create TP REJECT	<ul style="list-style-type: none"> Applicable for each new order version received Advises the buyer if their order has NOT been accepted by the seller Note: On receipt of each new order version, the order is reviewed for determination if TP ACCEPT or TP REJECT will be applied.
	Create TP SITE READINESS	<ul style="list-style-type: none"> Typically applies Pre-FOC/Pre-Confirmation Provides details on end user site requirements needed to install the service

	Create TP CONSTRUCTION	<ul style="list-style-type: none"> Typically applies Pre-FOC/Pre-Confirmation Provides details on construction requirements needed to install the service, such as cost and estimated number of days
	Create TP INFORMATIONAL	<ul style="list-style-type: none"> Applicable both Pre and Post Confirmation Advises the buyer of information that the seller wants to convey via remarks that does not require a modification to the order
	Create TP CONFIGURED	<ul style="list-style-type: none"> Typically applies Pre-FOC/Pre-Confirmation Provides the buyer configuration details such as Billing Account Number, Seller UNI ID, Seller ENNI ID, Seller OVC ID, etc.
	Create TP ERROR	<ul style="list-style-type: none"> Typically applies Pre-FOC/Pre-Confirmation Advises the buyer that the request has failed the seller's validations and seller may have stopped processing the request if the buyer is required to resolve the issue(s).
	Create TP ADDRESS ERROR	<ul style="list-style-type: none"> Typically applies Pre-FOC/Pre-Confirmation Advises the buyer that the request has a provider-initiated modification applied to the base and/or sub-location address and seller may have stopped processing the request if the buyer is required to resolve the issue(s).
	Create TP PRE JEOPARDY ERROR	<ul style="list-style-type: none"> Applicable prior to the 1st Confirmation/FOC Order contains both a Jeopardy and Error condition that may need to be resolved by the buyer Advises the buyer that the pre-confirmed (pre-FOC) request has encountered a situation that may jeopardize critical dates such as the desired due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s).
	Create TP PRE JEOPARDY	<ul style="list-style-type: none"> Applicable prior to the 1st Confirmation/FOC Order contains a Jeopardy condition that may need to be resolved by the buyer Advises the buyer that the pre-confirmed (pre-FOC) request has encountered a situation that may jeopardize critical dates such as the desired due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s)
	Create TP CLEAR	<ul style="list-style-type: none"> Applicable Pre and Post Confirmation Advises the buyer that any previously conveyed issues are resolved, C/NR's are closed, and the request can continue to be processed
	Create TP CONFIRMED	<ul style="list-style-type: none"> Provides the buyer critical information pertaining to their order, which may include circuit id's, order numbers, critical dates, etc.
	Create TP DLR	<ul style="list-style-type: none"> Applicable Post-FOC/Post-Confirmation Provides the buyer design information for each circuit
	Create TP PROVISIONING	<ul style="list-style-type: none"> Applicable Post-FOC/Post-Confirmation Provides the buyer provisioning details
	Create TP JEOPARDY ERROR	<ul style="list-style-type: none"> Applicable Post-FOC/Post-Confirmation Order contains both a Jeopardy and Error condition that may need to be resolved by the buyer Advises the buyer that the post-confirmed (post-FOC) request has encountered a situation that may jeopardize critical dates such as the confirmed/scheduled due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s)
	Create TP JEOPARDY	<ul style="list-style-type: none"> Applicable Post-FOC/Post-Confirmation Order contains a Jeopardy condition that may need to be resolved by the buyer

		<ul style="list-style-type: none"> Advises the buyer that the post-confirmed (post-FOC) request has encountered a situation that may jeopardize critical dates such as the confirmed/scheduled due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s)
	Create TP PTA	<ul style="list-style-type: none"> Applicable Post-FOC/Post-Confirmation Provides the buyer test acceptance information
	Create TP COMPLETE	<ul style="list-style-type: none"> Applicable Post-FOC/Post-Confirmation Advises the buyer that the service requested is active and billing can start No additional changes can be made to the order once a completion is posted.
	Create TP CANCELED	<ul style="list-style-type: none"> Applicable both Pre and Post Confirmation Advises the buyer that the service requested has been canceled due to no response to a previously conveyed issue and no further processing will occur.
	Preview	<ul style="list-style-type: none"> Populates the actual field value, overwriting the watermark that indicates the field will be automatically populated based on a mapping from the same response.
	Advance The Order	<ul style="list-style-type: none"> Allows user to answer questions in order to determine the appropriate response to apply to the order.
Start Over		Allows user to go back to the default initial population of a response to start it over. Also known as reset.

Superscript Values

You may see a superscript value against a response in the more actions drop down as follows:



Values can be any of the following:

Superscript Values	Additional Info
Non-Std	Indicates a non-standard (not industry compliant) response for an order Different types of orders may have different standards so the superscript display may vary based on which order you are issuing a response for.

Chapter 5

Search Orders

After selecting Search Orders on the Main Navigation bar, the Search screen will be displayed. This screen shall be used when a user wants to find previously created orders that have been either submitted or saved.

The left panel allows you to select the criteria for the search results to be displayed. The main panel displays the orders based on the left panel selections.

To view an order from the search result main panel, select the Request No (PON) hyperlink for the order that you want to view or modify.

Search Criteria Left Panel

Display criteria selected in the left panel shall be used to determine which orders are displayed in the main panel.

The screenshot shows a 'Refine By' sidebar with the following elements:

- Refine By** header with a back arrow.
- Refine By** button (green), **Reset** button (yellow), and **Manage Search** button (blue).
- Saved Searches:** A dropdown menu with 'SELECT'.
- Universal Catalog:** A dropdown menu with 'SELECT UNIVERSAL CATALOG'.
- Product Catalog:** A dropdown menu with 'SELECT PRODUCT CATALOG'.
- Status Groupings:** A dropdown menu with 'SELECT STATUS GROUPINGS'.
- Status Individual:** A dropdown menu with 'SELECT STATUS INDIVIDUAL'.
- SLA Groupings:** A dropdown menu with 'SELECT STATUS'.
- Milestone SLA:** A dropdown menu with 'SELECT SLA MILESTONE'.
- UOC Order Id:** A text input field with placeholder 'ENTER UOC ORDER ID'.
- Customer Order Id:** A text input field with placeholder 'ENTER CUSTOMER ORDER ID'.
- Order Flag:** A dropdown menu with 'SELECT ORDER FLAG'.
- Request No (PON):** A text input field with placeholder 'ENTER REQUEST NO (PON)'.

Search Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria
UNIVERSAL CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Universal Name ▪ Provides a list of Universal Names from the Universal Catalog for selection ▪ Allows single and multiple selections
PRODUCT CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Product Name ▪ Provides a list of Product Names from the Product Catalog for selection ▪ Allows single and multiple selections
STATUS GROUPINGS	<p>Base Status Grouping Options:</p> <ul style="list-style-type: none"> ▪ Open: Displays orders for all Statuses not equal to Complete, TP Complete, Canceled and TP Canceled ▪ Pending Initial Submission: Displays orders for status equal to Draft or Hold for Approval AND it is the initial version of the order. ▪ Buyer Action Required: Displays orders for status equal to Create Fail, BR Error, TP Error, TP Address Error, TP Reject, TP Jeopardy, and TP Pre Jeopardy. ▪ Seller Action Required: Displays orders for status equal to TP Sent, TP Send (New Due Date), TP Sent (Modify), TP Sent (Cancel)TP Accept, TP Clear, TP Confirmed, TP DLR, and TP PTA. ▪ All: Displays orders for all Statuses <p>Displays quantity of orders in parenthesis after each status grouping name</p> <p>Note 1: Custom status groupings created in the admin screen will also be visible under Status Groupings</p> <p>Note 2: Buyer Action Required and Seller Action Required fall under Pre FOC no confirmation notice/FOC response is posted and Post FOC if at least 1 Confirmation/FOC is posted against an order.</p>
STATUS INDIVIDUAL	<ul style="list-style-type: none"> ▪ Allows order search via Individual Status ▪ Allows single and multiple selections
SLA GROUPINGS	

MILESTONE SLA	
UOC ORDER ID	<ul style="list-style-type: none"> ▪ Allows order search via UOC Order ID ▪ Allows wildcard searching
CUSTOMER ORDER ID	<ul style="list-style-type: none"> ▪ Allows order search via Customer Order ID ▪ Allows wildcard searching
ORDER FLAG	<ul style="list-style-type: none"> ▪ Allows order search via Order Flag ▪ Allows single and multiple selections
REQUEST NO (PON)	<ul style="list-style-type: none"> ▪ Allows order search via PON ▪ Allows multiple PON search by separating them with a comma ▪ Allows wildcard searching
GROUP ID	<ul style="list-style-type: none"> ▪ Allows order search via Group ID ▪ Allows wildcard searching
PROJECT	<ul style="list-style-type: none"> ▪ Allows order search via a Project ID ▪ Allows wildcard searching
ACTIVITY	<ul style="list-style-type: none"> ▪ Allows order search via Activity ▪ Provides a list of Activities for selection ▪ Allows single and multiple selections
BUYER ID (CCNA)	
SELLER ID (ICSC)	
TRADING PARTNER (SELLER)	<ul style="list-style-type: none"> ▪ Allows order search via Trading Partner ▪ Provides a list of Trading Partners for selection ▪ Allows single and multiple selections
END USER	<ul style="list-style-type: none"> ▪ Allows order search via End User ▪ Provides a list of End Users for selection ▪ Allows single and multiple selections

END USERADDRESS	<ul style="list-style-type: none"> ▪ Allows order search via End User Address ▪ Provides a list of End User Addresses for selection ▪ Allows single and multiple selections
INITIATOR	<ul style="list-style-type: none"> ▪ Allows order search via Initiator ▪ Provides a list of Initiators for selection ▪ Allows single and multiple selections
OWNER	<ul style="list-style-type: none"> ▪ Allows order search via Owner ▪ Provides a list of Owners for selection ▪ Allows single and multiple selections
INFORMATIONAL STATUS	
TASK STATUS	
APPLICATION	<ul style="list-style-type: none"> ▪ Allows order search via Application ▪ Provides a list of Applications for selection ▪ Allows single and multiple selections
LAST ACTIVITY DATE	
CREATE DATE	<ul style="list-style-type: none"> ▪ Allows order search via Create Date ▪ Provides a FROM/TO option. Both do not need to be populated.
DUE DATE	<ul style="list-style-type: none"> ▪ Allows order search via Due Date ▪ Provides a FROM/TO option. Both do not need to be populated.

After the search criteria is populated, select the **Refine By** button on the top of the left panel. To clear the left panel from selected criteria, select the **Reset** button.

To manage saved searches, select the **Manage Search** button.

Wildcard Searches

When you are selecting criteria for a search in the UOC portal, you may select a value from a list, enter a date range, or type a value in a field. In fields where you type a value into a field, you can use the % character to expand the scope of the search.

%: Use % to represent one or more characters.

Examples:

- Enter %123 to return matches that end with 123, such as 234123 and 78123.
- Enter 123% to return matches that begin with 123, such as 123456 and 12389.
- Enter 12%45 to return matches that have any number of characters between 12 and 45, such as 126645 and 1288845.

Saved Search

Creating a Saved Search

There are two ways to create a saved search:

Option 1:

Step 1. Select the criteria for the search in the left panel of the search screen.

Step 2. Hit the **Manage Search** button on the top of the left panel and a pop-up window will appear with the already selected search criteria.

Step 3. Enter a name for the saved search in the Name field.

Step 4. Hit the **Save** button.

Option 2:

Step 1. Hit the **Manage Search** button on the top of the left panel and a pop-up window will appear.

Step 2. Enter a name for the saved search in the Name field.

Step 3. Enter the search criteria for the saved search in the pop-up window.

Step 4. Hit the **Save** button.

After a search is saved using either option, the name will be visible in the **Saved Searches** drop down in the left panel for future searches.

Note: If a user renames an existing saved search, then a new saved search will be created and the existing search will be retained as is.

Modifying a Saved a Search

There are two ways to modify an existing saved search:

Option 1:

Step 1. Select the name of the saved search you want to modify in the **Saved Searches** drop down in the left panel.

Step 2. Modify the criteria for the search in the left panel of the search screen.

Step 3. Hit the **Manage Search** button on the top of the left panel and a pop-up window will appear with the already modified search criteria.

Step 4. Hit the **Save** button.

Option 2:

Step 1. Select the name of the saved search you want to modify in the **Saved Searches** drop down in the left panel.

Step 2. Hit the **Managed Search** button on the top of the left panel and a pop-up window will appear with the current search criteria.

Step 3. Modify the search criteria in the pop-up box.

Step 4. Hit the **Save** button.

Note: The same name must be retained in order to modify an existing saved search. Modifying the name will create a new saved search.

Using a Saved a Search

In order to use a search that was saved:

Step 1. Go to the **Saved Searches** drop down in the left panel.

Step 2. From the drop down, select the name associated to the saved search you want to perform.

Step 3. Hit the **Refine By** button.

Deleting a Saved a Search

In order to delete a search that was saved:

Step 1. Select the name of the saved search you want to delete in the **Saved Searches** drop down in the left panel.

Step 2. Hit the **Managed Search** button on the top of the left panel and a pop-up window will appear.

Step 3. Hit the **Delete** button in the pop-up window.

Step 4. Confirm the deletion in the additional pop-up window.

Search Result Main Panel

The main panel contains the Search Result details. The following columns shall be visible:

The following fields shall be available (if any fields are not visible, see [Preferences](#) chapter):

Search Result Field	Description
ACTION	More information later in this section
REQUEST NO (PON)	Displays the PON/Request Number Select the PON hyperlink to go into the order.
UOC STATUS	Displays the current Order Status associated to the order returned
ORDER FLAG	Displays the Order Flag value associated to the order returned
SLA MILESTONE	Service Level Agreement Milestones set in the admin module for a Seller (Buyside) or Buyer (Sellside) will be displayed
SLA DUE (DAYS)	Number of days in the future or past for the SLA Milestone will be displayed
BUYER VERSION (VER)	Displays the latest order version
TRADING PARTNER (SELLER)	Displays the Trading Partner associated to the order
PRODUCT CATALOG	Displays the Product Name associated to the order
ACTIVITY	Displays the Activity associated to the order

RPON	<p>Displays the RPON associated to the order</p> <p>Select the RPON hyperlink to go into the order</p>
PROJECT	Displays the Project ID associated to the order
GROUP ID	Displays the Group ID value associated to the order
CH STATUS	
OI STATUS	
UOC ORDER ID	Displays the system derived order ID associated to the order
CUSTOMER ORDER ID	Displays the customer order ID associated to the order
SELLER ORDER ID	
BUYER ID (CCNA)	
SELLER ID (ICSC)	
BUYER SA/QUOTE ID	
SELLER SA/QUOTE ID	
END USER	Displays the End User associated to the order
END USER ADDRESS	Displays the End User Address associated to the
UNIVERSAL CATALOG	Displays the Universal Name associated to the order
CREATED DATE	
LAST ACTIVITY DATE	Displays the Last Activity Date associated to the order
LAST SUBMITTED BY	<p>Displays the User that last submitted the order.</p> <p>Note: If an order is held for approval, this would be the user that submitted the order and not the user that approved the</p>

	order.
OWNER	Displays the Owner associated to the order Note: To change an owner, go to the Work Queue.
TASK STATUS	
TASK SLA	
BUYER DUE DATE	
SELLER SCHEDULED DATE	
ORIG CONFIRMATION ISSUED	
SUPPLEMENT	
RESPONSES REQUESTED	
PTD	
DLR ISSUED	
BUYER SUP DUE	
EXPEDITE	Displays the Expedite Value associated to the order
REQUEST CHECK	Available to add from preferences. Sellers can use this to advise other users that the order/request has been reviewed and any action needed has been taken.
RESPONSE CHECK	Available to add from preferences. Buyers can use this to advise other users that the response has been reviewed and any action needed has been taken.

You may export the data in the search result table by selecting the **Export as CSV** button on the top of the main panel.

Superscript Values

You may see a superscript value against a status in the UOC Status column on the search result screen as follows:

Action	Request No (PON)	UOC Status	Order Flag	SLA Milestone	SLA Due (Days)	Buyer Version (Ver)
--PLEASE SELECT--	ASRS092022A0322	TP SEN ^{TINFO}				02

Values can be any of the following against the UOC Status column:

Superscript Values	Additional Info
FLUP-1/ FLUP-2/ FLUP-3	For TP INFORMATIONAL response (if the follow up number in REMARKS field is 1, 2 or 3)
INFO	For TP INFORMATIONAL response (if the follow up number in REMARKS field is not set)
DRAFT	If an order is Saved after initial successful submission.

You may see a superscript value against a Request Number (PON) value in the Request No (PON) column on the search result screen as follows:

Action	Request No (PON)
--PLEASE SELECT--	ASRS062022A05107 ^R

Values can be any of the following against the Request No (PON) column:

Superscript Values	Additional Info
2	For Split COMBO order
FS	Force Submit
R	For RPON

Action Drop Down

From either the Worklist or Search Order results table, Action will be located in the first column. The available options in the drop down are as follows:

! Important: You may not see all the options noted below in every drop down. Options vary per order and/or user role.

Action	Description
Clone	Allows user to replicate an existing order for creation of a new order. When an order is cloned, the Activity for that order can be changed from the original order.
Delete	Allows user to delete an existing order that is in draft status.
Review for Approval	Allows a user with a role that allows for Review and Approval to review and approve an order.
ASR View	Allows user to view order data that is being sent to the trading partner in the trading partner format when that format is an industry standard.
API JSON	Allows user to view the order via JSON format. Buyer: Minimal payload (less defaults, enrichment, etc) needed from the customer on an order. Seller: Minimal payload needed from the seller for a response. (Future implementation)
Full JSON	Allows user to view the order via full JSON format Buyer: Full payload (including defaults, enrichments, etc) available from the customer. Seller: Full payload available from the seller for a response.
Customer API	Allows user to view the order data that was sent by customer via API Allows user to view the response data that was sent by the seller via API
Change Order	Allows user to initiate a change order from a previously created order if circuit service status is Active in the service module and the change button configuration setting is turned on (by default it is On).
Disconnect Order	Allows user to initiate a disconnect order from a previously created order if circuit service status is Active in the service module and the disconnect button configuration setting is turned on (by default it is On).
Create Response	Allows user to insert a manual response to the order as provided by the seller via email, etc or as needed for testing purposes.

Chapter 6

Work Queue

After selecting Work Queue on the Main Navigation bar, the Work Queue screen will be displayed. When landing on the Work Queue the default display will be Open Orders with a Due Date less than 30 days in the past.

This screen shall be used when a user wants to find and/or monitor previously created orders.

The left panel allows you to refine or change which orders are displayed on the worklist and dashboard view.

The main panel displays the orders based on the left panel selections.

Display Criteria Left Panel

Display criteria selected in the left panel shall be used to determine which orders are displayed in the worklist and dashboard main panel.

The screenshot shows the 'Work Queue View' left panel. At the top, there are radio buttons for 'Company' and 'User', with 'User' selected. Below that is a checkbox for 'Set view as default'. A 'Refine By' section contains three buttons: 'Refine By' (green), 'Reset' (yellow), and 'Manage Search' (blue). Below these are several dropdown menus: 'Saved Searches' (SELECT), 'Status Groupings' (OPEN (0) X), 'Status Individual' (SELECT STATUS INDIVIDUAL), 'SLA Groupings' (SELECT STATUS), 'Milestone SLA' (SELECT SLA MILESTONE), 'Project' (ENTER PROJECT), and 'Activity' (SELECT ACTIVITY).

Work Queue View

There will be two options to view the worklist and dashboard – Company and User. The default value set will determine the view the user lands on when entering the work queue from the Main Navigation bar. Regardless of the default, you can toggle back and forth between both views – Company and User - by selecting the radio button for the other option (either Company or User) in the top left panel.

Company

The company view displays orders associated to all users within the domain.

User

The user view displays only those orders that are owner assigned to the logged in user within the domain.

Refine By

Left hand panel contains the “Refine By” criteria. The following criteria are available:

Refine By Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria
UNIVERSAL CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Universal Name ▪ Provides a list of Universal Names from the Universal Catalog for selection ▪ Allows single and multiple selections
PRODUCT CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Product Name ▪ Provides a list of Product Names from the Product Catalog for selection ▪ Allows single and multiple selections
STATUS GROUPINGS	<p>Base Status Grouping Options:</p> <ul style="list-style-type: none"> ▪ Open: Displays orders for all Statuses not equal to Complete, TP Complete, Canceled and TP Canceled ▪ Pending Initial Submission: Displays orders for status equal to Draft or Hold for Approval AND it is the initial version of the order. ▪ Buyer Action Required: Displays orders for status equal to Create Fail, BR Error, TP Error, TP Address Error, TP Reject, TP Jeopardy, and TP Pre Jeopardy. ▪ Seller Action Required: Displays orders for status equal to TP Sent, TP Send (New Due Date), TP Sent (Modify), TP Sent (Cancel)TP Accept, TP Clear, TP Confirmed, TP DLR and TP PTA.

Refine By Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria
UNIVERSAL CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Universal Name ▪ Provides a list of Universal Names from the Universal Catalog for selection ▪ Allows single and multiple selections
	<ul style="list-style-type: none"> ▪ All: Displays orders for all Statuses <p>Displays quantity of orders in parenthesis after each status grouping name</p> <p>Note 1: Custom status groupings created in the admin screen will also be visible under Status Groupings</p> <p>Note 2: Buyer Action Required and Seller Action Required fall under Pre FOC no confirmation notice/FOC response is posted and Post FOC if at least 1 Confirmation/FOC is posted against an order.</p>
STATUS INDIVIDUAL	<ul style="list-style-type: none"> ▪ Allows order search via Individual Status ▪ Provides a list of Applications for selection ▪ Allows single and multiple selections
SLA GROUPINGS	
MILESTONE SLA	
UOC ORDER ID	<ul style="list-style-type: none"> ▪ Allows order search via UOC Order ID ▪ Allows wildcard searching
CUSTOMER ORDER ID	<ul style="list-style-type: none"> ▪ Allows order search via Customer Order ID ▪ Allows wildcard searching
ORDER FLAG	<ul style="list-style-type: none"> ▪ Allows order search via Order Flag ▪ Allows single and multiple selections
REQUEST NO (PON)	<ul style="list-style-type: none"> ▪ Allows order search via PON ▪ Allows wildcard searching
TP ORDER ID	
GROUP ID	<ul style="list-style-type: none"> ▪ Allows order search via Group ID ▪ Allows wildcard searching
PROJECT	<ul style="list-style-type: none"> ▪ Allows order search via a Project ID ▪ Allows wildcard searching

Refine By Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria
UNIVERSAL CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Universal Name ▪ Provides a list of Universal Names from the Universal Catalog for selection ▪ Allows single and multiple selections
BUYER ID (CCNA)	
SELLER ID (ICSC)	
ACTIVITY	<ul style="list-style-type: none"> ▪ Allows order search via Activity ▪ Provides a list of Activities for selection ▪ Allows single and multiple selections
TRADING PARTNER (SELLER)	<ul style="list-style-type: none"> ▪ Allows order search via Trading Partner ▪ Provides a list of Trading Partners for selection ▪ Allows single and multiple selections
END USER	<ul style="list-style-type: none"> ▪ Allows order search via End User ▪ Provides a list of End Users for selection ▪ Allows single and multiple selections
END USER ADDRESS	<ul style="list-style-type: none"> ▪ Allows order search via End User Address ▪ Provides a list of End User Addresses for selection ▪ Allows single and multiple selections
INITIATOR	<ul style="list-style-type: none"> ▪ Allows order search via Initiator ▪ Provides a list of Initiators for selection ▪ Allows single and multiple selections
OWNER	<ul style="list-style-type: none"> ▪ Allows order search via Owner ▪ Provides a list of Owners for selection ▪ Allows single and multiple selections
INFORMATIONAL STATUS	
TASK STATUS	
APPLICATION	<ul style="list-style-type: none"> ▪ Allows order search via Application ▪ Provides a list of Applications for selection ▪ Allows single and multiple selections
LAST ACTIVITY DATE	

Refine By Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria
UNIVERSAL CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Universal Name ▪ Provides a list of Universal Names from the Universal Catalog for selection ▪ Allows single and multiple selections
CREATE DATE	<ul style="list-style-type: none"> ▪ Allows order search via Create Date ▪ Provides a FROM/TO option. Both do not need to be populated.
DUE DATE	<ul style="list-style-type: none"> ▪ Allows order search via Due Date ▪ Provides a FROM/TO option. Both do not need to be populated.

Once the criteria is populated, select the **Refine By** button on the top of the left panel.

To revert to the default search, select the **Reset** button.

To manage saved searches, select the **Manage Search** button.

Wildcard Searches

When you are selecting criteria for a search in the UOC portal, you may select a value from a list, enter a date range, or type a value in a field. In fields where you type a value into a field, you can use the % character to expand the scope of the search.

%: Use % to represent one or more characters.

Examples:

- Enter %123 to return matches that end with 123, such as 234123 and 78123.
- Enter 123% to return matches that begin with 123, such as 123456 and 12389.
- Enter 12%45 to return matches that have any number of characters between 12 and 45, such as 126645 and 1288845.

Display Result Main Panel

Worklist tab

The main panel worklist shall display orders based on the criteria selected in the left panel. The following fields shall be available (if any fields are not visible, see [Preferences](#)).

Refine By Field	Description
ACTION	
REQUEST NO (PON)	<ul style="list-style-type: none"> ▪ Displays the PON/Request Number ▪ Select the PON hyperlink to go into the order.
UOC STATUS	Displays the current Order Status associated to the order
ORDER FLAG	<ul style="list-style-type: none"> ▪ Displays the Order Flag value associated to the order
SLA MILESTONE	
SLA DUE (DAYS)	
BUYER VERSION (VER)	Displays the Version associated to the order returned based on the search criteria
TRADING PARTNER (SELLER)	<ul style="list-style-type: none"> ▪ Displays the Trading Partner associated to the order
PRODUCT CATALOG	<ul style="list-style-type: none"> ▪ Displays the Product Name associated to the order
ACTIVITY	<ul style="list-style-type: none"> ▪ Displays the Activity associated to the order
RPON	<ul style="list-style-type: none"> ▪
PROJECT	<ul style="list-style-type: none"> ▪ Displays the Project ID associated to the order
GROUP ID	<ul style="list-style-type: none"> ▪ Displays the Group ID value associated to the order
CH STATUS	
OI STATUS	
UOC ORDER ID	Displays the system derived order ID associated to the order
CUSTOMER ORDER ID	Displays the customer order ID associated with the order
SELLER ORDER ID	
BUYER ID (CCNA)	
SELLER ID (ICSC)	
BUYER SA/QUOTE ID	
SELLER SA/QUOTE ID	
END USER	Displays the End User associated to the order

END USER ADDRESS	Displays the End User Address associated to the order
UNIVERSAL CATALOG	Displays the Universal Name associated to the order
CREATED DATE	
LAST ACTIVITY DATE	Displays the Last Activity Date associated to the order
LAST SUBMITTED BY	Displays the User that last submitted the order. Note: If an order is held for approval, this would be the user that submitted the order and not the user that approved the order.
ASSIGN AN OWNER	Displays the Owner associated to the order Provides a drop down to assign or change the current owner
TASK STATUS	
TASK SLA	
BUYER DUE DATE	
SELLER SCHEDULED DATE	
ORIG CONFIRMATION ISSUED	
SUPPLEMENT	
RESPONSES REQUESTED	
PTD	
DLR ISSUED	
BUYER SUP DUE	
EXPEDITE	Displays the Expedite Indicator associated to the order
REQUEST CHECK	<ul style="list-style-type: none"> ▪ Available to add from preferences. ▪ Sellers can use this to advise other users that the order/request has been reviewed and any action needed has been taken.
RESPONSE CHECK	<ul style="list-style-type: none"> ▪ Available to add from preferences. ▪ Buyers can use this to advise other users that the response has been reviewed and any action needed has been taken.

You may export the data on the Worklist table by selecting the **Export as CSV** button on the top of the main panel.

Assigning an Owner

The owner is the current user who is working the order. This user can view and monitor the order from their user worklist to ensure it is moving to completion. To assign an owner or change the current owner to a new owner:

Step 1: Find the order on the main panel of the company worklist.

Step 2: Go to the Assign an Owner column on the main panel.

Step 3: Select a user from the drop-down list of available users.

Once the new user is selected, the order is now changed to the new user, and they will be able to see that order on their user worklist.

Note: You can only change an owner from the Work Queue. You cannot change an owner from the Search Order screen.

Worklist Search

The search bar on the top of each worklist column shall provide the ability to find a specific order or set of orders from the orders displayed in the worklist main panel. The orders displayed in the worklist main panel are based on the Refine By in the left panel.

Action Drop-Down

From either the Worklist or Search Order results table, Action will be located in the first column. The available options in the drop down are as follows:

! Important: You may not see all the options noted below in every drop down. Options vary per order and/or user role.

Action	Description
Clone	Allows user to replicate an existing order for creation of a new order. When an order is cloned, the Activity for that order can be changed from the original order.
Delete	Allows user to delete an existing order that is in draft status.
Review for Approval	Allows a user with a role that allows for Review and Approval to review and approve an order.
ASR View	Allows user to view order data that is being sent to the trading partner in the trading partner format when that format is an industry standard.
API JSON	Allows user to view the order via JSON format. Buyer: Minimal payload (less defaults, enrichment, etc) needed from the customer on an order. Seller: Minimal payload needed from the seller for a response. (Future implementation)

Full JSON	Allows user to view the order via full JSON format Buyer: Full payload (including defaults, enrichments, etc) available from the customer. Seller: Full payload available from the seller for a response.
Customer API	Allows user to view the order data that was sent by customer via API Allows user to view the response data that was sent by the seller via API
Change Order	Allows user to initiate a change order from a previously created order if circuit service status is Active in the service module and the <u>change button configuration setting is turned on (by default it is On).</u>
Disconnect Order	Allows user to initiate a disconnect order from a previously created order if circuit service status is Active in the service module and the <u>disconnect button configuration setting is turned on (by default it is On).</u>
Create Response	Allows user to insert a manual response to the order as provided by the seller via email, etc or as needed for testing purposes.

Order Flag

Order flags can be used to indicate special handling of an order. The values selected on the worklist are visible on the worklist, search result and order screens but can only be edited from the worklist or orderscreen.

To add or remove a flag from an order:

Step 1: Go to the Order Flag column on either the company or user worklist.

Step 2: Select a flag from the drop-down list of available flags to add a flag or deselect a flag from the drop-down list to remove an order flag.

Superscript Values

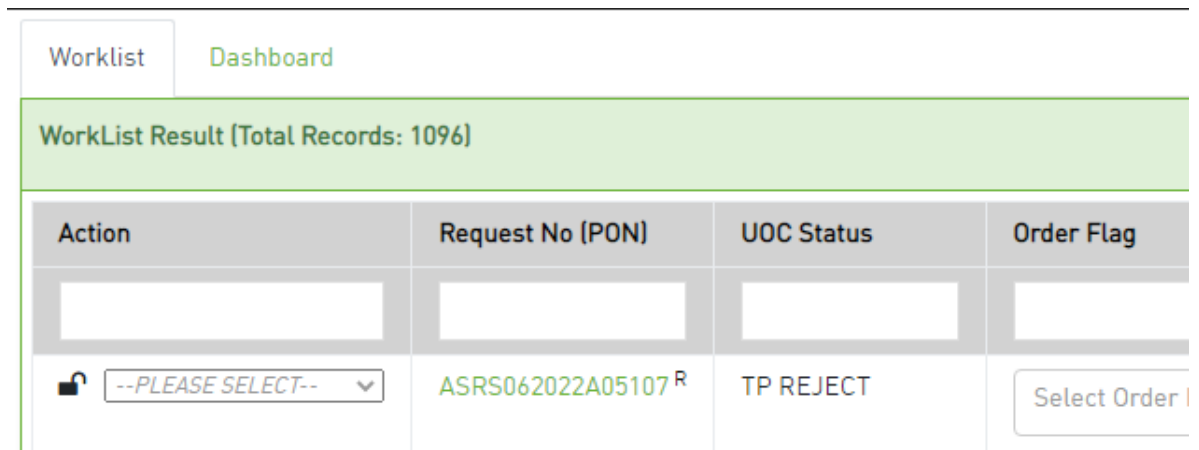
You may see a superscript value against a status in the UOC Status column on the search result screen as follows:

The screenshot shows a web interface with two tabs: 'Worklist' (selected) and 'Dashboard'. Below the tabs is a green header bar that reads 'WorkList Result (Total Records: 76)'. Underneath is a table with four columns: 'Action', 'Request No (PON)', 'UOC Status', and 'Order Flag'. The 'Request No (PON)' column contains the value 'ASRS092022A0322'. The 'UOC Status' column contains 'TP SENT' with a superscript 'INFO'. The 'Order Flag' column contains a button labeled 'Select Order Flag'. The 'Action' column contains a dropdown menu with a lock icon and the text '--PLEASE SELECT--'. The table is partially obscured by a light blue bar at the bottom.

Values can be any of the following against the UOC Status column:

Superscript Values	Additional Info
FLUP-1/ FLUP-2/ FLUP-3	For TP INFORMATIONAL response, if the follow up number in REMARKS field is 1, 2 or 3.
INFO	For TP INFORMATIONAL response, if the follow up number in REMARKS field is not set.
DRAFT	If an order is Saved after initial successful submission.

You may see a superscript value against a Request Number (PON) value in the Request No (PON) column on the search result screen as follows:



Values can be any of the following against the Request No (PON) column:

Superscript Values	Additional Info
2	For Split COMBO order
FS	Force Submit
R	For RPON

Dashboard Tab

The dashboard view allows you to get an overall health check on how orders are progressing.

The main panel dashboard shall display orders based on the criteria selected in the Refine By left panel. If the Refine By criteria changes, the dashboard view will update accordingly.

In any of the bar graphs, you may select any color (UOC Status) in a bar line, and you will be brought to the worklist tab to view the orders associated to the color selected.

The display is based on order count volume, the largest order count would be displayed first and the least last (descending order). The display looks slightly different in the User View of the Work Queue as opposed to the Company View which displays all users.

Pie Chart – Status Groupings/Status Individual

Toggle between showing Pie Chart as Status Groupings or Individual Status.

Provides an order volume percentage breakdown for each grouping or individual status. You can see the order count associated to the percentage by selecting a color within the pie chart.

Pie Chart – User

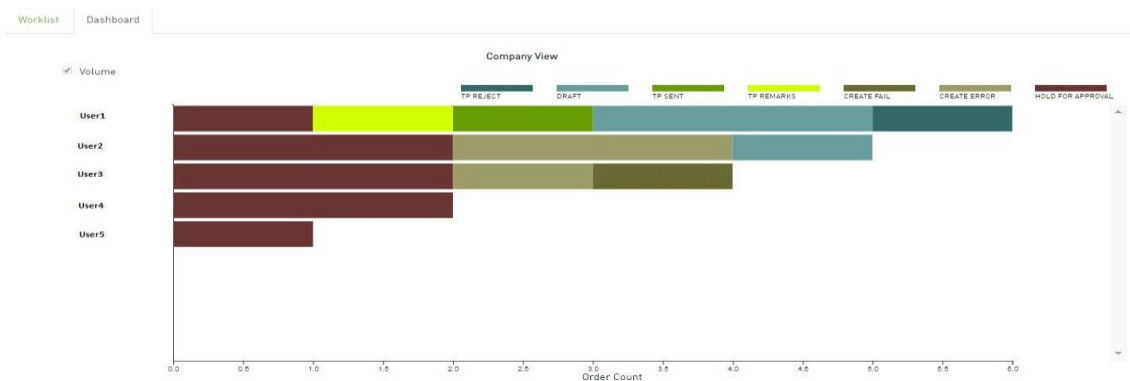
Provides an order volume percentage breakdown for each user. You can see the order count associated to the percentage by selecting a color within the pie chart.

Pie Chart – Trading Partner (Seller or Buyer)

Provides an order volume percentage breakdown for each Trading Partner. You can see the order count associated to the percentage by selecting a color within the pie chart.

Bar Graph - User Breakdown

Bar graph display where the user with the most order volume assigned to them based on the refine by criteria would be displayed first and then additional users assigned orders (owners) would be displayed in order of decreasing order count volume (descending order).



You may select any color (UOC Status) in a bar line, and you will be brought to the worklist tab to view the orders associated to the color selected.

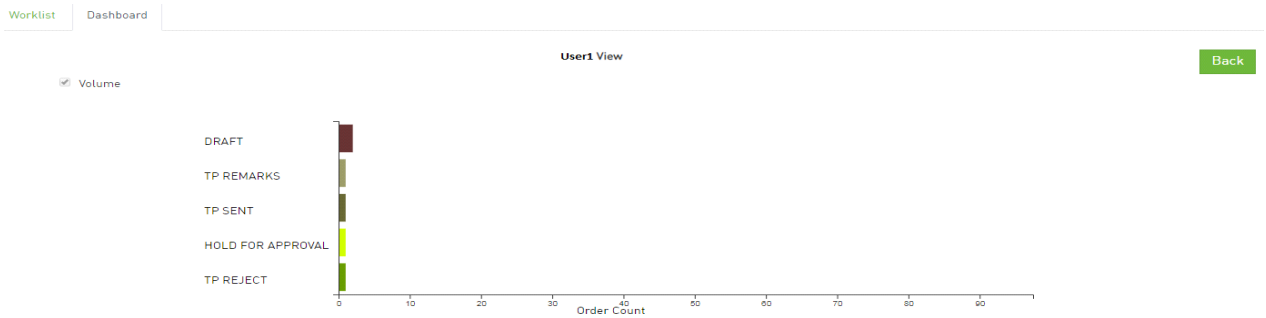
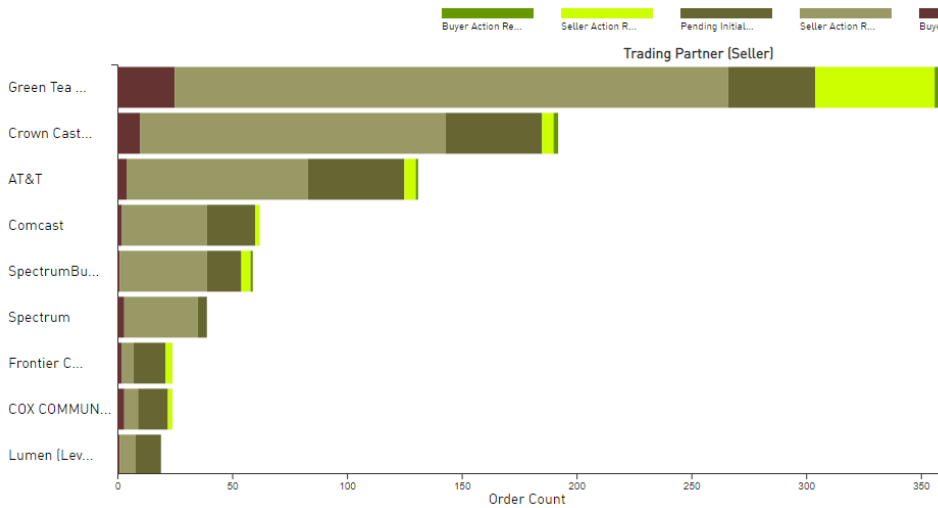
In order to get a status breakdown for a specific user, select the user’s name from the Y axis on the bar graph.

The display is then changed to be user specific for order count volume in descending order per status and per trading partner. This is the same view that a user would see if they selected the Dashboard tab while in the Work Queue view for User (instead of Company) as selected in the top left panel of the work queue.

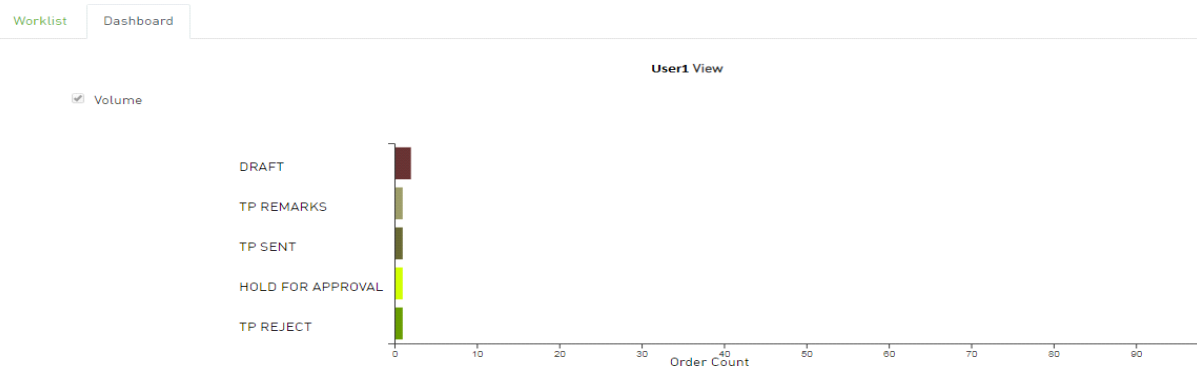
To return back to the previous view, select the “Back” button in the top right corner of the main panel.

Bar Graph - Trading Partner (Buyer or Seller) Breakdown

Bar graph display where the Trading Partner (Buyer or Seller) with the most order volume based on the refine by criteria would be displayed first and then additional Trading Partners would be displayed in order of decreasing order count volume (descending order).



You may select any color (UOC Status) in a bar line, and you will be brought to the worklist tab to view the orders associated with the color selected.



Chapter 7

API Work Queue

This module can only be activated for seller domains. This module is optional.

The API Work Queue will allow a user to manage which orders are passed to the seller’s internal applications for processing.

- If the order looks correct, then it can be transmitted to the seller via API.
- If the order does not look correct, then it can be rejected or errored back to the buyer without being transmitted to the seller so that only clean orders are passed to the seller.

After selecting API Work Queue on the Main Navigation bar, the API Work Queue page will be displayed.

Display Criteria Left Panel

Display criteria selected in the left panel shall be used to determine which orders are displayed in the API Worklist main panel. When landing on the API Work Queue, the left panel defaults to API Work Queue Status equal to API HOLD and FAILED in the left panel.

The screenshot shows the 'API Work Queue View' left panel. At the top, there are radio buttons for 'Company' (selected) and 'User', and a checkbox for 'Set view as default'. Below this is a 'Refine By' section with a 'Refine By' button, a 'Reset' button, and a 'Manage Search' button. The panel contains several dropdown menus: 'SELECT UNIVERSAL CATALOG', 'Product Catalog: SELECT PRODUCT CATALOG', 'API Work Queue Status: API HOLD (87) X -1', 'Status Groupings: SELECT STATUS GROUPINGS', 'Status Individual: SELECT STATUS INDIVIDUAL', 'SLA Groupings: SELECT STATUS', 'Milestone SLA: SELECT SLA MILESTONE', 'UOC Order Id: ENTER UOC ORDER ID', 'Customer Order Id: ENTER CUSTOMER ORDER ID', and 'Order Flag: SELECT ORDER FLAG'.

Work Queue View

There will be two options to view the work queue – Company and User. The default value set will determine the view the user lands on when entering the work queue from the Main Navigation bar. Regardless of the default, you can toggle back and forth between both views – Company and User - by selecting the radio button for the other option (either Company or User) in the top left panel.

Company

The company view displays orders associated to all users within the domain.

User

The user view displays only those orders that are owner assigned to the logged in user within the domain.

Refine By

Left hand panel contains the “Refine By” criteria. The following criteria are available:

Refine By Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria
UNIVERSAL CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Universal Name ▪ Provides a list of Universal Names from the Universal Catalog for selection ▪ Allows single and multiple selections
PRODUCT CATALOG	<ul style="list-style-type: none"> ▪ Allows order search via Product Name ▪ Provides a list of Product Names from the Product Catalog for selection ▪ Allows single and multiple selections
API WORK QUEUE STATUS	
STATUS GROUPINGS	<ul style="list-style-type: none"> ▪ Base Status Grouping Options: ▪ Open: Displays orders for all Statuses not equal to Complete, TP Complete, Canceled and TP Canceled ▪ Pending Initial Submission: Displays orders for status equal to Draft or Hold for Approval AND it is the initial version of the order. ▪ Buyer Action Required: Displays orders for status equal to Create Fail, BR Error, TP Error, TP Address Error, TP Reject, TP Jeopardy, and TP Pre

	<p>Jeopardy.</p> <ul style="list-style-type: none"> ▪ Seller Action Required: Displays orders for status equal to TP Sent, TP Send (New Due Date), TP Sent (Modify), TP Sent (Cancel)TP Accept, TP Clear, TP Confirmed, TP DLR and TP PTA. ▪ All: Displays orders for all Statuses <p>Displays quantity of orders in parenthesis after each status grouping name</p> <p>Note 1: Custom status groupings created in the admin screen will also be visible under Status Groupings</p> <p>Note 2: Buyer Action Required and Seller Action Required fall under Pre FOC no confirmation notice/FOC response is posted and Post FOC if at least 1 Confirmation/FOC is posted against an order.</p>
STATUS INDIVIDUAL	<ul style="list-style-type: none"> ▪ Allows order search via Individual Status ▪ Provides a list of Applications for selection ▪ Allows single and multiple selections
SLA GROUPINGS	
MILESTONE SLA	
UOC ORDER ID	<ul style="list-style-type: none"> ▪ Allows order search via UOC Order ID ▪ Allows wildcard searching
CUSTOMER ORDER ID	<ul style="list-style-type: none"> ▪ Allows order search via Customer Order ID ▪ Allows wildcard searching
ORDER FLAG	<ul style="list-style-type: none"> ▪ Allows order search via Order Flag ▪ Allows single and multiple selections
REQUEST NO (PON)	<ul style="list-style-type: none"> ▪ Allows order search via PON ▪ Allows wildcard searching
SELLER ORDER ID	
GROUP ID	<ul style="list-style-type: none"> ▪ Allows order search via Group ID ▪ Allows wildcard searching

PROJECT	<ul style="list-style-type: none"> ▪ Allows order search via a Project ID ▪ Allows wildcard searching
BUYER ID (CCNA)	
SELLER ID (ICSC)	
ACTIVITY	<ul style="list-style-type: none"> ▪ Allows order search via Activity ▪ Provides a list of Activities for selection ▪ Allows single and multiple selections
BUYER	<ul style="list-style-type: none"> ▪ Allows order search via Trading Partner ▪ Provides a list of Trading Partners for selection ▪ Allows single and multiple selections
END USER	<ul style="list-style-type: none"> ▪ Allows order search via End User ▪ Provides a list of End Users for selection ▪ Allows single and multiple selections
END USER ADDRESS	<ul style="list-style-type: none"> ▪ Allows order search via End User Address ▪ Provides a list of End User Addresses for selection ▪ Allows single and multiple selections
INITIATOR	<ul style="list-style-type: none"> ▪ Allows order search via Initiator ▪ Provides a list of Initiators for selection ▪ Allows single and multiple selections
OWNER	<ul style="list-style-type: none"> ▪ Allows order search via Owner ▪ Provides a list of Owners for selection ▪ Allows single and multiple selections
INFORMATIONAL STATUS	
TASK STATUS	
APPLICATION	<ul style="list-style-type: none"> ▪ Allows order search via Application ▪ Provides a list of Applications for selection ▪ Allows single and multiple selections

LAST ACTIVITY DATE	
CREATE DATE	<ul style="list-style-type: none"> • Allows order search via Create Date • Provides a FROM/TO option. Both do not need to be populated.
DUE DATE	<ul style="list-style-type: none"> • Allows order search via Due Date • Provides a FROM/TO option. Both do not need to be populated.

Once the criteria is populated, select the **Refine By** button on the top of the left panel.

To revert to the default search, select the **Reset** button.

To manage saved searches, select the **Manage Search** button.

Wildcard Searches

When you are selecting criteria for a search in the UOC portal, you may select a value from a list, enter a date range, or type a value in a field. In fields where you type a value into a field, you can use the % character to expand the scope of the search.

•: Use % to represent one or more characters. Examples:

- Enter %123 to return matches that end with 123, such as 234123 and 78123.
- Enter 123% to return matches that begin with 123, such as 123456 and 12389.
- Enter 12%45 to return matches that have any number of characters between 12 and 45, such as 126645 and 1288845.

Display Result Main Panel

Worklist tab

The main panel worklist shall display orders based on the criteria selected in the left panel. The following fields shall be available:

Search Result Field	Description
ACTION	
REQUEST NO (PON)	Displays the PON/Request Number Select the PON hyperlink to go into the order.
UOC STATUS	Displays the current Order Status associated with the order
ORDER FLAG	Displays the Order Flag value associated with the order
SLA MILESTONE	
SLA DUE (DAYS)	
BUYER VERSION (VER)	Displays the Version associated to the order
BUYER	Displays the Trading Partner associated to the order
PRODUCT CATALOG	Displays the Product Name associated to the order
ACTIVITY	Displays the Activity associated to the order
RPON	
PROJECT	Displays the Project ID associated to the order
GROUP ID	Displays the Group ID value associated to the order
CH STATUS	
OI STATUS	
UOC ORDER ID	Displays the system derived order ID associated to the order
CUSTOMER ORDER ID	Displays the customer order ID associated to the order
SELLER ORDER ID	
BUYER ID (CCNA)	
SELLER ID (ICSC)	
BUYER SA/QUOTE ID	
SELLER SA/QUOTE ID	
END USER	Displays the End User associated to the order

END USER ADDRESS	Displays the End User Address associated to the order
UNIVERSAL CATALOG	Displays the Universal Name associated to the order
CREATED DATE	
LAST ACTIVITY DATE	Displays the Last Activity Date associated to the order
LAST SUBMITTED BY	Displays the User that last submitted the order. Note: If an order is held for approval, this would be the user that submitted the order and not the user that approved the order.
ASSIGN AN OWNER	Displays the Owner associated to the order Provides a drop down to assign or change the current owner
TASK STATUS	
TASK SLA	
BUYER DUE DATE	
SELLER SCHEDULED DATE	
ORIG CONFIRMATION ISSUED	
SUPPLEMENT	
RESPONSES REQUESTED	
PTD	
DLR ISSUED	
BUYER SUP DUE	
EXPEDITE	Displays the Expedite Indicator associated to the order
SUB DOMAIN	
API STATUS	

API LAST ACTIVITY DATE	
API LAST SUBMITTED BY	
API ERROR MESSAGE	

You may export the data on the Worklist table by selecting the **Export as CSV** button on the top of the main panel.

Assigning an Owner

The owner is the current user who is working the order. This user can view and monitor the order from their user worklist to ensure it is moving to completion. To assign an owner or change the current owner to a new owner:

Step 1: Find the order on the main panel of the worklist.

Step 2: Go to the Assign an Owner column on the main panel.

Step 3: Select a user from the drop-down list of available users.

Once the new user is selected, the order is now changed to the new user and they will be able to see that order on their user worklist.

Worklist Search

The search bar on the top of each worklist column shall provide the ability to find a specific order or set of orders from the orders displayed in the worklist main panel. The orders displayed in the worklist main panel is based on the Refine By in the left panel.

Action Check Box

Allows you to indicate which orders are applicable for an action. The action buttons are located in the top left of the main panel. The available action buttons shall only be enabled once at least one line is checked in the action column.

Order Flag

Order flags can be used to indicate special handling of an order. The values selected on the worklist are visible on the worklist, search result and order screens but can only be edited from the worklist or order screen.

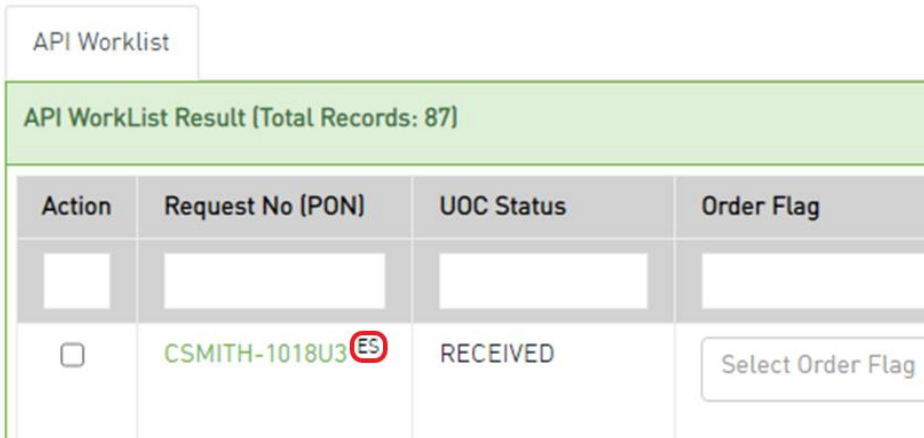
To add or remove a flag from an order:

Step 1: Go to the Order Flag column on either the company or user worklist.

Step 2: Select a flag from the drop-down list of available flags to add a flag or Deselect a flag from the drop down list to remove an order flag.

Superscript Values

You may see a superscript value against a Request Number (PON) value in the Request No (PON) column on the API Worklist Result screen as follows:



Values can be any of the following against the Request No (PON) column:

Superscript Values	Additional Info
2	For Split COMBO order
FS	Force Submit
ES	Enrichment Success
EP	Enrichment in Progress
EF	Enrichment Failed
TS	Transmit Success
TF	Transmit Failed
R	For RPON

Note: The above superscript values are also visible from the Work Queue and Search Result screen.

Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Validate**. Action buttons that are unavailable are dimmed/disabled. Action buttons are located in the top right main panel of a screen if applicable.

The following actions are supported for API Worklist:

Button	Sub Menu	Description
Customer API		Allows user to view the order data that was sent by customer via API Allows user to view the response data that was sent by the seller via API

Create Response	Create TP REJECT	<ul style="list-style-type: none"> ▪ Applicable Pre and Post Confirmation (FOC) ▪ Advises the buyer if their order has NOT been accepted by the seller
	Create TP ERROR	<ul style="list-style-type: none"> ▪ Typically applies Pre-FOC/Pre-Confirmation ▪ Advises the buyer that the request has failed the seller’s validations and seller may have stopped processing the request if the buyer is required to resolve the issue(s).
	Create TP ADDRESS ERROR	<ul style="list-style-type: none"> ▪ Typically applies Pre-FOC/Pre-Confirmation ▪ Advises the buyer that the request has a provider-initiated modification applied to the base and/or sub-location address and seller may have stopped processing the request if the buyer is required to resolve the issue(s).
	Create TP PRE JEOPARDY ERROR	<ul style="list-style-type: none"> ▪ Applicable prior to the 1st Confirmation/FOC ▪ Order contains both a Jeopardy and Error condition that may need to be resolved by the buyer ▪ Advises the buyer that the pre-confirmed (pre-FOC) request has encountered a situation that may jeopardize critical dates such as the desired due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s).
	Create TP PRE JEOPARDY	<ul style="list-style-type: none"> ▪ Applicable prior to the 1st Confirmation/FOC ▪ Order contains a Jeopardy condition that may need to be resolved by the buyer ▪ Advises the buyer that the pre-confirmed (pre-FOC) request has encountered a situation that may jeopardize critical dates such as the desired due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s)
	Create TP JEOPARDY ERROR	<ul style="list-style-type: none"> ▪ Applicable Post-FOC/Post-Confirmation ▪ Order contains both a Jeopardy and Error condition that may need to be resolved by the buyer ▪ Advises the buyer that the post-confirmed (post-FOC) request has encountered a situation that may jeopardize critical dates such as the confirmed/scheduled due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s)
	Create TP JEOPARDY	<ul style="list-style-type: none"> ▪ Applicable Post-FOC/Post-Confirmation ▪ Order contains a Jeopardy condition that may need to be resolved by the buyer ▪ Advises the buyer that the post-confirmed (post-FOC) request has encountered a situation that may jeopardize critical dates such as the confirmed/scheduled due date and seller may have stopped processing the request if the buyer is required to resolve the issue(s)
	Create TP CANCELED	<ul style="list-style-type: none"> ▪ Applicable both Pre and Post Confirmation ▪ Advises the buyer that the service requested has been canceled due to no response to a previously conveyed issue and no further processing will occur.
Transmit		<p>Allows user to transmit the order to the seller internal applications via API</p> <p>Note: The initial transmit will also enrich the order if applicable based on set up</p>
Erich		<p>Allows user to update the enrichment of an order with the data from the seller’s internal applications</p>
Archive API		
Export as CSV		

API Work Queue Status

Status	Definition
API ARCHIVE	Records which were archived because user hit the skip button for those records.
API HOLD	Records which are held on the API Worklist Queue because these records satisfied a configured hold condition.
AUTO API ARCHIVE	A newer version of the order is being held on the queue and hence the earlier version of the order is auto archived.
FAILED	UOC attempted to send the request to the seller but it failed due to seller reject.
GUI RESPONSE	A response was provided from UOC GUI for this order.
SUCCESS	Record was successfully submitted to the seller.

Chapter 8

Circuit Insights

After selecting Circuit Insights on the Main Navigation bar, the Circuit Insights landing page will be displayed.

The Circuit Insights module can track inventory, equipment, financial and order history of changes:

Search Criteria Left Panel

Refine By

[Refine By](#) [Reset](#) [Manage Search](#)

Saved Searches:

Customer Service ID:

UOM Service ID:

Universal Catalog Name:

Product Catalog Name:

Service Type:

PON:

Service Status:
 +1 ▼

Seller Circuit ID:


Seller Virtual Circuit ID:


End User:

End User Address:

Two Six Code:

Trading Partner:

Service Start Date From:
 

Service Start Date To:
 

The left panel contains the Search Criteria The following criteria are available:

Search Field	Description
SAVED SEARCHES	Allows order search via previously defined selection criteria.
CUSTOMER SERVICE ID	Service ID that was assigned to the circuit or two-six code (TSC) by the customer.
UOC SERVICE ID	Service ID that was auto assigned to the circuit or TSC by the UOC application.
UNIVERSAL CATALOG NAME	Universal name associated to the service.
PRODUCT CATALOG NAME	Product name associated to the service.
SERVICE TYPE	Service Type associated to the service.
PON	Request Number/PON value associated to the service.
SERVICE STATUS	Defaulted to In Process and Active. The following criteria determine the Service Status: In Process- The Install order is not complete or canceled. Active- The Install order is complete. Disconnected- An Active circuit is disconnected. - Service End Date is populated. Canceled- An In Process circuit is canceled. - Initial Service Start Date is blank and install order (Act N) status is Canceled or TP Canceled.
SELLER CIRCUIT ID	Seller Circuit ID associated to the service.
SELLER VIRTUAL CIRCUIT ID	Seller Virtual Circuit ID associated to the service.
END USER	End User associated to the service
END USER ADDRESS	End User Address associated to the service
TWO SIX CODE	TSC associated to the service.
TRADING PARTNER	TP associated to the service.
SERVICE START DATE FROM	Date service was installed FROM.
SERVICE START DATE TO	Date service was installed TO.

Some refine by criteria allows wildcard searching using the percent (%) sign.

Refine By default is set to Service Status **In Process** and **Active** by default.

Once the criteria is populated, select the **Refine By** button on the top of the left panel.

To revert back to the default search, select the **Reset** button.

To manage saved searches, select the **Manage Search** button.

Search Result Main Panel

The main panel contains the Search Result details. The following columns shall be visible and are searchable using the open text field directly below the column header field name:

Customer Service ID	UOM Service ID	Universal Catalog Name	Product Catalog Name	Service Type	Seller Circuit ID	Seller Virtual Circuit ID
CUSTOMER SERVI	UOM SERVICE	UNIVERSAL CATALOG N	PRODUCT CATALOG N	SERVICE TY	SELLER CIRCU	SELLER VIRTUAL CIRC
No data found						

Search Result Field	Description
CUSTOMER SERVICE ID	ID provided by the customer upon submission of the order for the service.
UOC SERVICE ID	ID generated by UOC upon submission of the order for a new service.
UNIVERSAL CATALOG NAME	Universal Catalog name associated to the service
PRODUCT CATALOG NAME	Product Catalog name associated to the service
SERVICE TYPE	Service Type associated to the product catalog name
SELLER CIRCUIT ID	Physical Circuit ID returned on the confirmation from the Trading Partner
SELLER VIRTUAL CIRCUIT ID	Virtual Circuit ID returned on the confirmation from the Trading Partner
END USER PRIMARY LOCATION	End Username at the primary location associated to the service.
END USER ADDRESS PRIMARY LOCATION	End User address at the primary location associated to the service.
END USER SECONDARY LOCATION	End Username at the secondary location associated to the service.
END USER ADDRESS SECONDARY LOCATION	End User address at the secondary location associated with the service.
TWO SIX CODE	TSC associated to the service.
INITIAL SERVICE START DATE	The date the initial install order is complete
SERVICE START DATE	The date the latest install order is complete
SERVICE END DATE	The date the disconnect order is complete
SERVICE STATUS	<ul style="list-style-type: none"> ▪ In Process- The Install order is not complete or canceled. ▪ Active- The Install order is complete. ▪ Disconnected- An Active service is disconnected. Service End Date is populated.

	<ul style="list-style-type: none"> Canceled- An In Process service is canceled. Initial Service Start Date is blank and install order (Act N) status is Canceled or TP Canceled.
SERVICE STATUS UPDATED DATE	The date the last time the service status was changed.
TRADING PARTNER	The Trading Partner associated to the service.
CURRENT SERVICE TERM	The latest term agreement associated to the service.
CURRENT SERVICE TERM START DATE	When an order contains a term agreement and activity is not Change, Inside Move or Disconnect then the Completion date (CD field value) as noted on the completion C/NR shall be used as the Service Term Start Date.
CURRENT SERVICE TERM EXPIRATION DATE	System calculation using Service Term Start Date plus Current Service Term to determine the Service Term Expiration date

Important! Data will be updated in the Circuit Insights module only after a positive response (TP Accept, TP Confirmed or TP Complete) is received from the trading partner, not after submission of the order version. This ensures the accuracy of the service module in case an order version gets rejected by the trading partner.

Service

After a UOC service ID is selected from the Main Panel of the landing page results, you will be brought to the Service specific screen.

Service Snapshot

The Service Snapshot is located in the left panel of the Service Specific screen and provides the general service details for the Circuit ID or TSC.

Service Snapshot	
Customer Service ID	
UOM Service ID	NSR_SWIT10000385.1
Universal Catalog Name	UC2
Product Catalog Name	SWITCHED ETHERNET COMBO - EU
Service Type	Switched Ethernet: Terminating at End User
Seller Circuit ID	99.KFGS.765432..TT
Seller Virtual Circuit ID	
End User Primary Location	END USER 1
End User Address Primary Location	123 MAIN ST BLDG 1, FL 1, ROOM 101 ANY CITY ST 90001

Service Details								
Buyer Circuit ID Reference:	11.PORT.CKR.123				Buyer Virtual Circuit ID Reference:			
MRC:					NRC:			
Seller Trunk ID:					Telecommunication Service Priority:			
Primary Location CLLI:					Secondary Location CLLI:			
CFA:					SCFA:			
CCEA:					SCCEA:			
Ethernet Switch Point:	ABCDMABE01W				TCIC:			
EVC Reference	Seller EVC Circuit Identifier	EVC UOM Service ID	VLAN	COS Activity	COS Reference	Class of Service	SPEC	Bandwidth
01	99.VLXR.876543..TT	NSR_SWIT10000385.2	1234		1	BEST EFFORT		100M

Order Details

The Order Details is located in the bottom section of the main panel.

Order Details										
Customer Order ID	UOM Order ID	Request Number	Buyer Project ID	Request Activity	Requested By Name	Service Term	Requested Due Date	Seller Due Date	Seller Order Number	Seller ID
123	NSRDSWITN00007181	TEST-SERVICE-01		Install	Emily Boe	36	12-06-2019	12-06-2019	C2LL98766	LT30

To view the actual order, select the Request Number/PON hyperlink and a new tab on your existing browser will display the order.



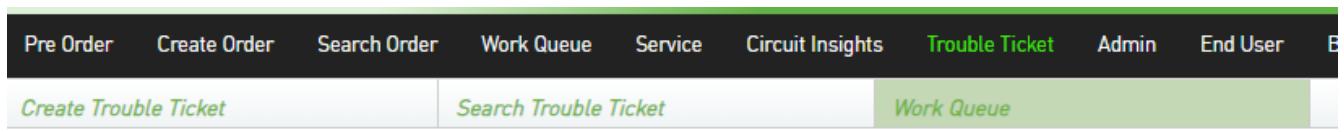
To view the service details associated to a different order, select anywhere within an order line and that line will be highlighted. The service details will reflect the information from that highlighted order when not defaulted to the latest.

Order Details										
Customer Order ID	UOM Order ID	Request Number	Buyer Project ID	Request Activity	Requested By Name	Service Term	Requested Due Date	Seller Due Date	Seller Order Number	Seller ID
123	NSRDSWITN00007181	TEST-SERVICE-01		Install	Emily Boe	36	12-06-2019	12-06-2019	C2LL98766	LT30

Chapter 9

Trouble Ticket

After selecting Trouble Ticket on the Main Navigation bar, you will land on the Work Queue in the worklist tab containing existing trouble tickets. Existing trouble tickets are ones that have either been saved in draft status or previously submitted to a provider (Seller).



There are 3 sub menu options associated with this screen as follows:

- Create Trouble Ticket
- Search Trouble Ticket
- Work Queue – divided into 2 tabs: Worklist (landing tab) and Dashboard

User's can create new trouble tickets 3 ways:

- 1- By selecting the “Create Trouble Ticket” sub menu option in the Trouble Ticket module to create a ticket from scratch.
- 2- By selecting Clone under the Action drop down from the “Search Trouble Ticket” or “Work Queue” sub menu option in the Trouble Ticket module to create a new ticket from an existing ticket.
- 3- By selecting the “Trouble Ticket” button from the Circuit Insights module to create a ticket using the information from the inventory of that circuit.

User's can view existing trouble tickets that have been saved in draft status or submitted to a trading partner/seller by selecting the “Search Trouble Ticket” or “Work Queue” options from the sub menu.

Trouble Ticket Left Panel

Trouble Ticket Creation

After selecting the Create Trouble Ticket option from the sub menu, the left panel of the Create Trouble Ticket screen will be displayed. These fields will become non-editable once the trouble ticket (TT) has been submitted to the trading partner.

The following fields are required on new trouble ticket (TT) creation:

Trouble Ticket Creation Details

Provider (Seller):*

SELECT PROVIDER (SELLER) ▼

Please specify Trouble Ticket Catalog:*

SELECT TROUBLE TICKET CATALOG ▼

Network ID:*

Select Network ID ▼

Account Name:*

Select Account Name ▼

Trouble Ticket Creation Field	Description
Provider (Seller)	<p>Required to submit a TT.</p> <p>Drop-down containing your companies configured Trading Partners for which you are allowed to place trouble tickets.</p> <p>Select the Provider that shall receive the ticket.</p>
Please specify the Trouble Ticket Catalog	<p>Required to submit a TT.</p> <p>Drop-down containing Trouble Ticket Catalog options:</p> <ul style="list-style-type: none"> Resold POTS Services with a Premise Address Services without a Premise Address <p>Select 1 TT Catalog option.</p>
Network ID	<p>Required to submit a TT.</p> <p>This value will be auto populated based on the Provider selected.</p>
Account Name	<p>Required to submit a TT.</p> <p>This value will be auto populated based on the customer domain that is creating the ticket.</p>

Summary

After an initial TT is submitted or saved, a summary section will be visible on the left panel of an existing TT. Most fields are only visible in the summary when a value is populated for that field. Editable fields are always visible.

The summary section will be a combination of TT and response details and may contain the following fields:

Field	Values
Trouble Ticket Number	Customer number associated with the Trouble Ticket.
Trouble Ticket Report ID	Provider (Seller) number associated with the Trouble Ticket.
UOC Trouble Ticket ID	UOC auto generated number
Application	Will always be TAM while in the Trouble Ticket Module
TT Status	Displays the latest update on the TT's state progression such as Open or Cleared.
TT Sub-Status	Displays the latest update on the trading partner's progression on restoring the circuit.
Created Date	
Last Updated Date	
Last Status Change Date	
Error Code	Will display errors associated to the following response: <ul style="list-style-type: none"> • TP REJECT
Contact Name	
Contact Phone	
Commitment Time	
TN/Circuit ID	
LEC User ID	
Trouble Found	

Service Charge	
Restore Time	Displays the actual date/time that the circuit was restored to working.

Add Note

You can add a note directly from the left panel.

Note: On creation of a new TT, this note will only be retained if the TT is saved or submitted. Perform the following steps to add a note:

- Step 1.* Select from the Category drop-down.
- Step 2.* Type the note in the Note field.
- Step 3.* Hit the Save button.

Audit Trail

After an initial TT is submitted or saved, an audit trail will be visible on the left panel of an existing TT.

The audit trail is defaulted to an expanded view. To collapse the view, select the up arrow on the Audit trail box. To expand the view, select the down arrow on the audit trail box.

The audit trail will provide a list of all statuses in descending order with the associated date/time stamp each status occurred along with the username.

Trouble Ticket Main Panel

The main panel shall be used to populate the trouble ticket information as well as perform actions using the action buttons.

Trouble Ticket Tab

Once the left panel Trouble Ticket Creation Details is populated, the main panel will be loaded. The Trouble Ticket Catalog selected will dictate how the main panel looks...which sections and fields are available, etc. The Trouble Ticket tab may contain defaults associated to the catalog selected that can be over-ridden by the buyer.

Populate the Trouble Ticket tab with the information required to report the trouble. Once the Trouble Ticket contains all necessary information, you can validate the TT using the “Validate” button located in the top right corner of the page.

You will need to resolve the errors received during the validation process so the TT can be sent to the provider. Once the order is error free, you may use the “Submit” button located in the top right corner to send it to the provider.

You may also use the “Save” button to save the TT if key fields needed to save the TT are populated: Trouble Ticket Number, TN/Circuit ID, Trouble Type.

Trouble Ticket History Tab

Event	Timestamp	Action
Trouble Report Create Notification : TP CONFIRMED	09/12/2023 10:34:47 AM	View Details
Trouble Report Create Notification : TP CONFIRMED	09/12/2023 10:31:59 AM	View Details
Create Trouble Ticket Success : TP ACCEPT	09/12/2023 10:30:33 AM	View Details
Create Trouble Ticket Request	09/12/2023 10:28:25 AM	View Details

Note: The Trouble Ticket History tab is not visible upon creation of a trouble ticket.

After an initial TT is saved or submitted, a Trouble Ticket History tab will be visible in the main panel of the TT directly following the Trouble Ticket tab. Any previously submitted versions of the Trouble Ticket as well as provider responses shall be listed in descending order with the latest on top.

Only those fields that are populated in the response by the provider are visible in the Trouble Ticket history. If a field is not visible, then it was not provided back on the response from the provider.

Select “View Details” to view a TT version or seller response.

- Selection of a TT version will bring up a new tab with the trouble ticket information.
- Selection of a trading partner response will expand the row within the trouble ticket history and display the response details.
- To collapse a response, select “Hide Details”.

Notes Tab

The Notes tab in the main panel of each order allows users to add information and track the history for the life of an order. The notes tab is always visible.

The screenshot shows the 'Notes' tab interface. At the top, there are navigation tabs: 'Universal Order', 'Product Order', 'Order History', 'Tasklist', and 'Notes'. Below these is the 'Add Note' section, which includes a 'Category' dropdown menu, an 'Attach File' button (labeled 'Choose File' and 'No file chosen'), a 'Document Title' input field, and a 'Note' text area. There are 'Save' and 'Clear' buttons at the bottom right of the 'Add Note' section. Below this is the 'Note History' section, which features two date range input fields ('CREATE DATE FROM' and 'CREATE DATE TO') and a 'Search' button. The 'Note History' section contains a table with the following columns: 'Category', 'Created Date', 'Created By', 'Document Title', 'Version', 'Attached To', and 'Notes / Description'. The table currently shows 'No data found'.

Add Note

Perform the following steps to add a note:

- Step 1.* Click the **Notes** tab to add a note.
- Step 2.* In the **Add Note** pane, select a category from **Category** drop-down and add required text in the **Note** text field.
- Step 3.* To add a document, select the **Choose File** button in the Attach File field, find the saved document and then double click it to upload. Enter the name of the document in the **Document Title** field associated to the attached document.
- Step 4.* Click **Save** to save the note.

Notes History

Whether a note is added in the left panel or main panel, the Note History section will capture all notes in descending order based on the Created Date.

Each column in the note history table is searchable and sortable.

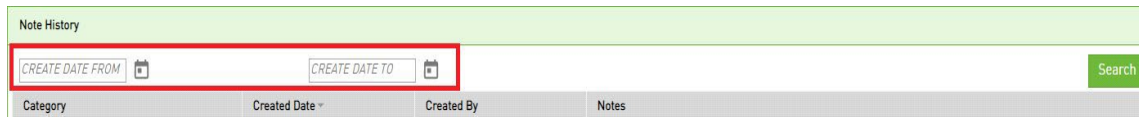
To sort, select the column header field name for ascending and twice for descending.

To search, use the open text boxes under the column header field name and type in your search criteria.

The screenshot shows the 'Note History' table with the following data:

Category	Created Date	Created By	Notes
General	11/01/2019 09:25:00	tkramer	Note 2 Test
Follow Up	11/01/2019 09:24:25	tkramer	Contacted Trading Partner representative Beth Doe to determine when my FOC was going to be received.

After saving or submitting the initial order, you may search based on a created date range.



1. Click “**CREATE DATE FROM**” to select the required create date.
2. Click “**CREATE DATE TO**” to select the required date.
3. Click **Search** to find the note history for a particular date range.
4. The notes associated with that date range will be visible in the table.

Timeline




The Timeline is not visible upon creation of a trouble ticket.

After an initial trouble ticket is submitted or saved, a timeline will be visible on the top portion of an existing TT. If the timeline goes beyond a single line, it will be in a collapsed view and only the latest status boxes will be visible.


The down arrow located on the top right of the timeline will expand the timeline. The up arrow located on the top right of the timeline will collapse the timeline.

The timeline will provide a visual view of which statuses have already occurred and which statuses will occur in the future (using a sunny day scenario). Additional statuses will be inserted into the timeline as they occur.

Reload

You can reload the timeline by selecting the re-load icon  in the top right corner of the order screen.

View in Full

You can view the full timeline by selecting the down icon  in the top right corner of the order screen.

Rectangular Outline

If status has already occurred, a rectangular box outline shall be displayed in green for Complete.

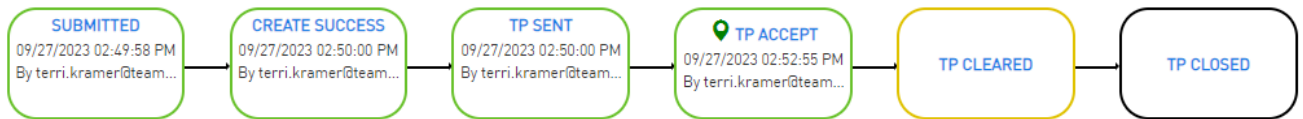
If status is in the future and directly after a rectangular box with a green outline with blue status font, a rectangular box outline shall be displayed in yellow for Pending (aka the next status that is expected to occur).

Otherwise, a rectangular box outline shall be displayed in black for the Future.


Font Color

If any rainy day/error type status occurs, the status will be displayed in red font within the rectangle box, an example of rainy-day statuses is:

- TP REJECT



You Are Here

The “You Are Here” icon  in a timeline box indicates the last action that occurred on an order.

Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Validate**. Action buttons that are unavailable are dimmed/disabled. Action buttons are located on the top right main panel of a screen if applicable.

Create Trouble Ticket

The following actions are supported for creation of a TT:

Button	Description
Submit	Allows a TT to be submitted to the trading partner/seller and, if error free and not held for approval, sent to the Trading Partner. If there is a validation error, such as BR ERROR, it must be resolved before the order is sent to the Trading Partner/seller.
Save	Allows an initial TT to be saved in a draft status and not submitted to the Trading Partner/Seller.
Validate	Validates against business rules and returns errors on the TT.

Modify Trouble Ticket

The following actions are supported for modification of a TT:

! Important: You may not see all the options noted below in every drop down. Options vary per order.

Button	Menu	Description
Create New Trouble Ticket		<p>Allows a user to create a new TT after submission of existing TT.</p> <p>When this button is selected, the screen will display in the same fashion as if the Create Trouble Ticket sub menu was selected and you will be able to create a new TT from scratch.</p>
More Actions	Cancel	<p>Allows a TT that has previously been submitted to a trading partner to be canceled.</p> <p>A supplement will be issued to the trading partner requesting the TT to be canceled.</p>
	Escalate	<p>Allows a TT that has previously been submitted to a trading partner to be escalated.</p> <p>A supplement will be issued to the trading partner requesting the TT to be escalated.</p>
	Add Trouble Ticket Info	<p>Allows a TT that has previously been submitted to a trading partner to be updated with additional information.</p> <p>A supplement will be issued to the trading partner with the additional TT information provided.</p>
	Delete	<p>Allows a TT that has never been submitted to the trading partner to be deleted in UOC only.</p> <p>Note: TT is still visible in CH if applicable.</p>
	Closeout Verification	Allows buyer to notify seller if TP CLEARED response is verified (resolved) or denied (still having a trouble)
	Customer API	<p>Allows user to view the TT data that was sent by customer via API</p> <p>Allows user to view the response data that was sent by the seller via API</p>
Submit		<p>Allows a TT to be submitted to the trading partner/seller and, if error free, sent to the Trading Partner.</p> <p>-If there is a validation error, it must be resolved before the TT will be sent to the seller.</p>
Save		Allows an initial TT to be saved in a draft status and not submitted to the trading partner.
Validate		<p>Validates against business rules and returns errors on the TT.</p> <p>Note: If validate is not selected and the order is submitted with errors then BR ERROR status will result and TT will NOT be sent to the trading partner.</p>

Repeating Sections

When creating or updating a Trouble Ticket (TT), a section can be tagged as repeatable with the maximum number of times it can be repeated.

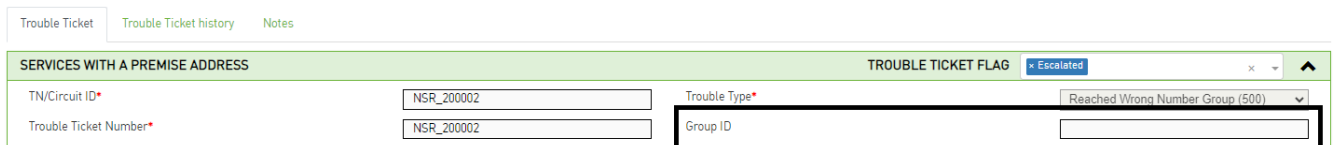
If a section is repeatable, it will be indicated on the right side in the header of that section as follows:



- To repeat a section on the TT, update the **Repeat Count** text field with the increased number of sections needed and hit the Update/Go icon in the header of the section that needs to be repeated.
- You can also use this same method for removing a section. Simply update the text box by decreasing the number of sections needed and hit the Update/Go icon in the header of the section. The sections will be removed from the end.
- If a repeating section is left completely blank, it will not be passed to trading partner.

Group ID

Group ID is always located in the main panel on the Trouble Ticket tab in the 1st section of the TT. This field can be used as an internal project ID to group a set of orders for internal tracking purposes. This field is not sent to the seller and is only visible in UOC. You may search on the Work Queue and Search screens using a Group ID value and this value is visible on the results returned from the search.



Trouble Ticket Flag

Trouble Ticket flags can be used to indicate either special handling of a TT or to archive an open TT that will never progress to closed or canceled. The flag values selected in the TT are visible on the TT, TT worklist and TT search result screens. The values for the Trouble Ticket Flag are editable from the TT itself and the TT Worklist within the Work Queue but not from the TT search screen.

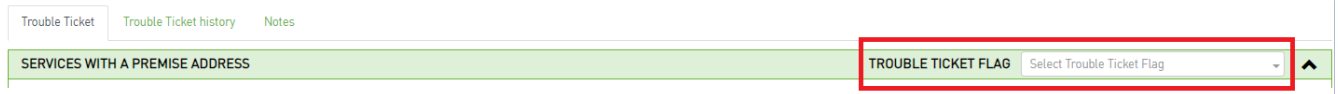
The archive option will remove the TT from the open TTs on the worklist. In order to view an archived order:

- Go to the Trouble Ticket Flag drop down in the left panel of the TT Work Queue
- Select archive from the drop-down and then select the **Refine By** button.
- All archived orders that meet the search criteria will be displayed in the main panel worklist tab.

All other options in the Trouble Ticket Flag drop down will retain the TT in the current state of opened, canceled or complete.

To add or remove a flag from a TT including adding or removing from archive:

Step 1: Go to the 1st header section of the order and select the Trouble Ticket Flag drop-down.



Step 2: Check flag(s) from the drop-down list to add a flag or uncheck the flag(s) from the drop-down list to remove a flag.

To add or remove a flag from the worklist including adding or removing from archive:

Step 1: Go to the Trouble Ticket Flag column and select the drop down associated to the TT you want to flag/unflag.

Int Clear Time	Last Action	UOC Trouble Ticket ID	Trouble Ticket Flag	Assign An Owner
		NSRRTT00001301	Select Trouble Ticket Flag	--Please select--
		NSRRTT00000503	Escalated	--Please select--

Step 2: Check the flag(s) from the drop-down list to add a flag or uncheck the flag(s) from the drop-down list to remove a flag.

Status

From either the worklist main panel or the search order main panel result screen, the latest status shall be visible for a TT.

To view the status history of a TT you must be in the existing ticket. You can view the history from either the audit trail in the left panel or the timeline on the top of the main panel.

The status values for UOC Buy and Sell are as follows ((M) = Marketplace Buyer):

UOC TT Status	UOC Sub Status / Error Type	Displayed when
DRAFT		<ul style="list-style-type: none"> TT has been created in UOC TT has not been submitted by the user to the Trading Partner TT has been saved by the user in UOC
SUBMITTED		<ul style="list-style-type: none"> Initial TT has been submitted by the user in UOC Request is pending the Neustar

		gateway/business rule validation engine
SUBMITTED (CANCEL)		<ul style="list-style-type: none"> • TT has been submitted by the user in UOC for a cancel • Request is pending the Neustar gateway/business rule validation engine
SUBMITTED (MODIFY)		<ul style="list-style-type: none"> • TT has been submitted by the user in UOC for a modification • Request is pending the Neustar gateway/business rule validation engine
CREATE FAIL		<ul style="list-style-type: none"> • TT has been submitted • Requested has failed to create (convert to TP format) in backend database <p>Contact Neustar for Failure reason</p>
BR ERROR		<ul style="list-style-type: none"> • TT has been submitted • Requested has failed business rule validations for industry compliance and/or seller specific business rules
BR ERROR (MODIFY)		<ul style="list-style-type: none"> • TT has been submitted for a modify TT • Requested has failed business rule validations for industry compliance and/or seller specific business rules
TP SENT		<p>Initial TT has been successfully sent to the Seller (Trading Partner)</p> <p>Cancel TT has been successfully sent to the Seller (Trading Partner)</p> <p>Modified TT has been successfully sent to the Seller (TP)</p>
TP ACCEPT	<p>2 – Testing 3 – Dispatched In 4 – Dispatched Out 7 – Start Repair 8 – Pending Test 9- Pending Dispatch 10 – Request Repair 11 – Refer MTCE Center 12 – Refer Vendor 31 – Cancelled Pending Work In</p>	<ul style="list-style-type: none"> • An initial request or subsequent version has been submitted to the Trading Partner • Trading Partner has responded back with Success for the version

	<p>Progress 32 – Cancelled Pending Test Completion 33 – Cancelled Pending Dispatch Completion</p>	
TP REJECT	<ul style="list-style-type: none"> • Access Denied • Invalid Data Received • Processing Failure • Resource Limitation • Duplicate Invocation • Invalid Function Received • Fall Back Reporting • Trouble Report Already Exists • TR Must Be Present Attribute Missing 	<ul style="list-style-type: none"> • An initial request or subsequent version has been submitted to the Trading Partner • Trading Partner has responded back with failure for the version
TP CONFIRMED SUB STATUS CHANGE (M)	<p>2 – Testing 3 – Dispatched In 4 – Dispatched Out 7 – Start Repair 8 – Pending Test 9- Pending Dispatch 10 – Request Repair 11 – Refer MTCE Center 12 – Refer Vendor 31 – Cancelled Pending Work In Progress 32 – Cancelled Pending Test Completion 33 – Cancelled Pending Dispatch Completion</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has responded back with repair updates
TP CLEARED	<p>20 – Temporary OK 24 – Cleared Customer Not Advised 25 – Cleared Customer Advised 26 – Cleared Awaiting Customer Verification</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has sent notification to the customer that the trouble reported has been resolved • Pending Customer Response
TP CLOSED	<p>27 – Closed Out 28 – Closed By Customer Request 29 – Closed Out Customer Verified 30 – Closed Out Customer Denied</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the request • Trading Partner has responded back that request is complete • This is a terminal status and no further updates can be made on the TT

<p>CANCELED</p>		<ul style="list-style-type: none"> • Trading Partner has previously Accepted the TT • Customer has canceled the TT • Trading Partner has Accepted the request to cancel • This is a terminal status and no further updates can be made on the TT
<p>TP DISABLED</p>	<p>0 - New 1 - Screening 2 - Testing 3 - Dispatched In 4 - Dispatched out 5 - Preassigned Out 6 - Bulk Dispatched Out 7 - Start Repair 8 - Pending Test 9 - Pending Dispatch 10 - Request Repair 11 - Refer MTCE Center 12 - Refer Vendor 13 - No Access Other 14 - Start No Access 15 - Stop No Access 16 - Start Delayed MTCE 17 - Stop Delayed MTCE 18 - Trouble Escalated 19 - Craft Dispatched 20 - Temporary OK 21 - Cable Failure 22 - Originating Equipment Failure 23 - Back Order 24 - Cleared Customer Not Advised 25 - Clear Customer Advised 26 - Cleared Awaiting Customer Verification 27 - Closed Out 28 - Closed By Customer Req 29 - Closed Out Customer Verified 30 - Closed Out Customer Denied 31 - Cancelled Pending Work in Progress 32 - Cancelled Pending Test Completion 33 - Cancelled Pending Dispatch Completion 34 - Technician On Site 35 - Technician Left Site</p>	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the TT • Trading Partner has responded back that request is disabled • This is a terminal status and no further updates can be made on the TT

TP DEFERRED	13 - No Access Other 14 - Start No Access 15 - Stop No Access 16 - Start Delayed MTCE 17 - Stop Delayed MTCE	<ul style="list-style-type: none"> • Trading Partner has previously Accepted the TT • Trading Partner has responded back that request is deferred
TP INFORMATIONAL		<ul style="list-style-type: none"> • Provides notes/updates on Transunion attempts to get a response from the seller

Validation Errors

After selecting the Validate button on a trouble ticket, if any required fields are not populated or there is a business rule error associated to a field, the errors will be displayed on the top of the ticket.

You can select the error under the Trouble Ticket Errors section on the top of the screen to be hyperlinked to the field associated with the error in order to correct it.

If there are no validation errors after selecting the Validate button, then a “Validation successful” message will be displayed advising that all required fields are populated and no business rule errors were found.

Note: You may still submit your order in UOC even if it contains an error and, while this is not advised, it is permissible and may result in the status of BR ERROR if any business rules are found after submission.

Help Text

Requested Due Date x

GUI ALIAS NAME: Requested Due Date

ACTIVITY: Install, Change, Disconnect, Record

DEFAULT VALUE: NONE

REQUIRED: Yes

DESCRIPTION:

Identifies the customer's desired due date.

NOTE 1: The actual due date may be different from that desired because of factors such as the availability of facilities and the quantity, complexity, and impact on local service of the circuit(s) involved.

NOTE 2: On disconnect requests, this date represents the date billing is to stop on the involved circuit(s) and can be no earlier than the date the request is received by the provider.

NOTE 3: When different due dates are required, these dates are stipulated using a separate request for each desired due date. For example, a total of 50 circuits are desired and the customer wants them at a rate of 10 per day. Therefore, five ASR forms may be submitted stipulating this requirement.

NOTE 4: When multiple ASRs are associated with one Translation Questionnaire, all DDDs must be identical.


Close

In order to see help text for a given field on an order, click on the field name and a pop-up will appear with any available help text.

To close the box, click the Close button at the bottom right corner of the pop-up.

Back


Allows the user to go back to the previous screen and retain previous selections.

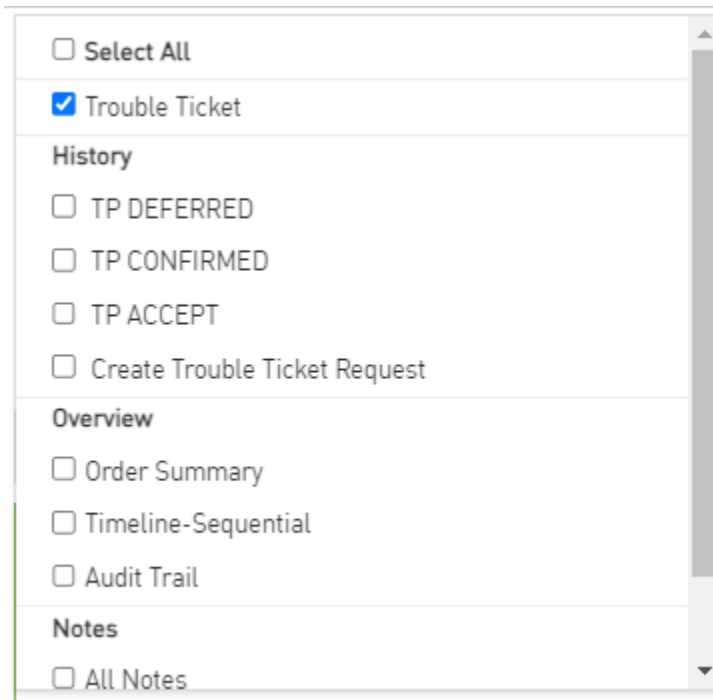
When the Back Icon  is selected, the user will go back to the previous screen which shall retain any previous Refine By selections that were made in the left panel.

Note: Selection from the main panel to another screen will take the user to the screen in the default landing page and not retain any Refine By selections previously made.

Print

Allows an order or response to be printed.

When the Printer Icon  is selected, a drop down with check boxes will appear. Default selection shall be Trouble Ticket.



When an item is checked, it shall be included for printing. You may modify the default selection.

When you are done selecting the check boxes for item to be included in the printing, scroll to the bottom and select the **Done** button.

A pop-up will appear with items to be included for printing. Select either **Print** or **Generate PDF** (can be used for saving or printing) buttons at the bottom of the screen. You may also use the **Close** button to remove the pop up.

Response Creation

In a seller domain, it may be a user’s job function to issue responses against Trouble Tickets received by their buyers. UOC offers certain users, based on user role, the ability to issue responses. Only applicable responses for the TT will be displayed in the **More Actions** button drop down based on Status.

In a seller domain, from the work queue or search result screen:

Step 1: Find the Trouble Ticket that you want to issue a response against.

Step 2: Go to the Action drop-down and select **Create Response/Notification**. You are brought to the TT screen providing ticket information.

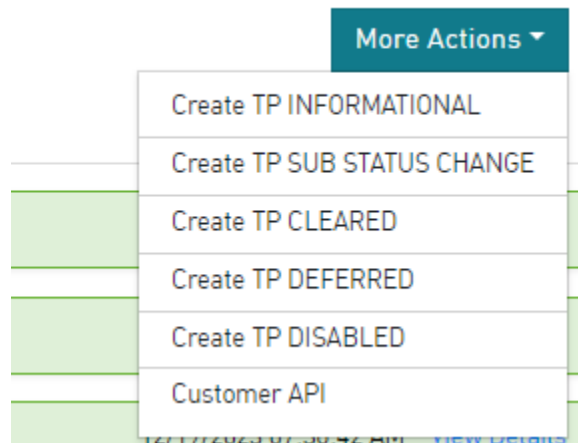
Step 3: Review the TT details if necessary.

Step 4: Go to the **More Actions** button and select the appropriate response. Available responses may differ based on the TT Status. Note: Responses are available from the **More Actions** drop-down based on the **Create Response/Notification** selection. If you do not see any responses listed then you are not in the Create Response mode.

Step 5: Fill out the response with the appropriate values for the TT.

Step 6: Click the **Validate** button to validate the response values.

Step 7: Click the **Submit** button to send the response back to the buyer. The response is then stored in the Trouble Ticket History tab of the TT.



Action Buttons

An action button is any button in the UOC portal that triggers an action, such as **Submit** or **Validate**. Action buttons that are unavailable are displayed as dimmed/disabled. Action buttons are located in the top right main panel of a screen if applicable.

Create Response

The following actions are supported for creation of a response:

! Important: You may not see all the options noted below in every drop down. Options vary per TT Status

Button	Sub Menu	Description
Submit		Allows a response to be submitted to the trading partner/buyer if error free. <ul style="list-style-type: none"> All validation errors must be resolved before the TT response is sent to the buyer.
Save		Allows a response to be saved in a draft status and not submitted to the trading partner.
Validate		Validates against business rules and returns errors on the UOC response.
More Actions	Create TP ACCEPT	<ul style="list-style-type: none"> Applicable for each TT submission received from the buyer Advises the buyer that their original or revised TT has been accepted by the seller for processing <p>Note: On receipt of each new TT, the ticket is reviewed for determination if TP ACCEPT or TP REJECT will be applied.</p>
	Create TP REJECT	<ul style="list-style-type: none"> Applicable for each TT submission received from the buyer Advises the buyer that their original or revised TT has NOT been accepted by the seller <p>Note: On receipt of each new TT, the ticket is reviewed for determination if TP ACCEPT or TP REJECT will be applied.</p>
	Create TP INFORMATIONAL	<ul style="list-style-type: none"> Advises the buyer of information that the seller or Transunion wants to convey to the buyer via remarks
	Create TP CLEARED	<ul style="list-style-type: none"> Advises the buyer that the circuit trouble reported has been resolved
	Create TP CONFIRMED	<ul style="list-style-type: none"> Provides the buyer steps being taken in the progression of resolving the trouble. Notification is sent to buyer and status is updated
	Create TP SUB STATUS CHANGE	<ul style="list-style-type: none"> Provides the buyer steps being taken in the progression of resolving the trouble. Status remains the same and only the Sub Status of the Ticket is updated
	Create TP DEFERRED	<ul style="list-style-type: none"> Provides the buyer notification that the ticket is deferred until a later time.
	Create TP CLOSED	<ul style="list-style-type: none"> Advises the buyer that the TT is closed/complete This is a terminal status and no additional changes can be made to the TT
	Create TP DISABLED	<ul style="list-style-type: none"> Provides the buyer notification that the ticket is disabled. This is a terminal status and no additional changes can be made to the TT
	Customer API	<ul style="list-style-type: none"> Allows user to view the TT data that was sent by customer via API Allows user to view the response data that was sent by the seller via API
Start Over		Allows user to go back to the default initial population of a response to start it over. Also known as reset.

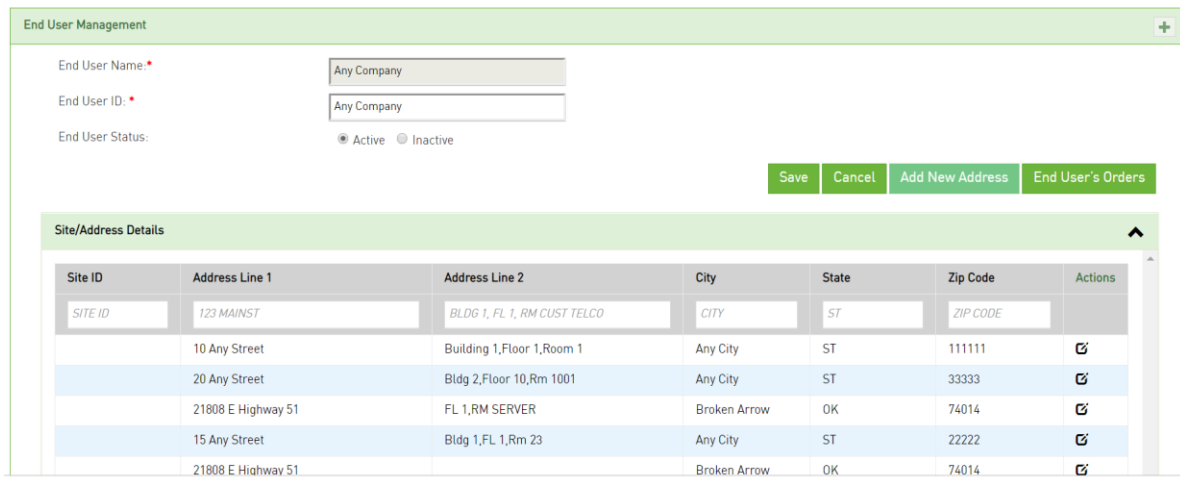
Chapter 10

End User

After selecting End User on the Main Navigation bar, the End User screen will be displayed. This screen shall be used to

- Add new end users and new addresses
- Add new addresses to an existing end user
- Modify an existing address for an end user
- Enable/Disable an End User or Address

The end user module is used to quickly and accurately populate the end user information on an order that an end user is applicable.



- Any End User that has a status active/enabled will be displayed in the End User drop down on the order.
- Any Address that is associated to the selected End User and has a status active/enabled will be displayed in the Address drop down on the order.

Any user shall have the ability to add or update the End User screen. In addition, users can also add or modify address information on the End User screen directly from an order.

Adding a New End User

Step 1. From the landing page, select the plus button on the right side of the End User Management header line:



Step 2. Enter the End Username (required).

Step 3. Enter the End User ID for that End User (required).

Step 4. Enter one Address/Contact details associated to the End User (required).

A. While adding a brand-new end user, only 1 address can be added for that end user.

See Adding a New Address for adding additional addresses associated to an existing end user.

B. New End Users are defaulted to Active (enabled). See Enabling/Disabling an End User.

Step 5. Hit the **Save** button to save the change. A message will display that the record was created successfully.

Step 6. Hit the **Cancel** button to be brought back to the landing page.

Enabling/Disabling an End User

Step 1. From the landing page, select the existing End User from the drop down in the end user management panel.

A. A list of existing addresses associated to that end user will be displayed.

Step 2. From the End User Management panel, select the **Active** radio button to enable an end user or the **Inactive** radio button to disable an end user.

Step 3. A message will display that the record was updated successfully.

Step 4. Hit the **Cancel** button to be brought back to the landing page.

Adding a New Address

Step 1. From the landing page, select the existing End User associated to the new address from the drop down in the end user management panel.

A. A list of existing addresses associated to that end user will be displayed.

Step 2. Hit the **Add New Address** button.

Step 3. Enter the Address and Contact details.

A. New addresses are defaulted to Active (enabled). See Enabling/Disabling an Address.

Step 4. Hit the **Save** button to save the change. A message will display that the record was created successfully.

Step 5. You may repeat steps 2-4 if there are additional addresses for the same end user that need to be added.

Step 6. Hit the **Cancel** button to be brought back to the landing page.

The following is the list of address and contact fields available in the Address section:

Field	Description
Site ID	<p>Address Details</p> <p>This field does not map to CH.</p> <p>Reference ID associated to the address. Optional</p>
<p>Address Line 1</p> <p>Example: 123 MAIN ST N</p>	<p>For ASR in CH, associated to the following fields on the SALI record:</p> <ul style="list-style-type: none"> ▪ SAPR ▪ SANO ▪ SASF ▪ SASD ▪ SASN ▪ SATH ▪ SASS
<p>Address Line 2</p> <p>Example: BLDG 1, FL 2, RM 202</p> <p>Important: Field Designation/ Field Value groupings must be comma separated!</p>	<p>For ASR in CH, associated to the following fields on the SALI record:</p> <ul style="list-style-type: none"> ▪ LD1/LV1 ▪ LD2/LV2 ▪ LD3/LV3
City	<p>For ASR in CH, associated to the following fields on the SALI record:</p> <ul style="list-style-type: none"> ▪ CITY
<p>State</p> <p>Example: ST</p>	<p>For ASR in CH, associated to the following fields on the SALI record:</p> <ul style="list-style-type: none"> ▪ STATE
Zip Code	<p>For ASR in CH, associated to the following fields on the SALI record:</p> <ul style="list-style-type: none"> ▪ ZIP
Working Telephone	<p>For ASR in CH, associated to the following fields on the SALI record:</p> <ul style="list-style-type: none"> ▪ WKTEL

Latitude	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ LAT
Longitude	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ LONG
Access Information	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ ACC
Contact Details	
Primary Contact Name	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ LCON
Primary Contact Phone 1	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ ACTEL
Primary Contact Phone 2	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ AACTEL
Primary Contact Email	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ LCON EMAIL
Secondary Contact Name	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ ALCON
Secondary Contact Phone 1	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ ALCON TEL
Secondary Contact Phone 2	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ AALCON TEL
Secondary Contact Email	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ ALCON EMAIL
Remark Details	

Note:	For ASR in CH, associated to the following fields on the SALI record: <ul style="list-style-type: none"> ▪ AAI
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Modifying an Existing Address

Step 1. From the landing page, select the existing End User associated to the new address from the drop down in the end user management panel.

A list of existing addresses associated with that end user will be displayed.

Step 2. From the list of existing addresses, go to the action column and select the edit icon for the address that needs to be modified.

Step 3. Perform the modifications.

Step 4. Hit the **Save** button to save the change.

Step 5. A message will display that the record was updated successfully.

Step 6. You may repeat steps 2-4 if there are additional addresses for the same end user that need to be modified.

Step 7. Hit the **Cancel** button to be brought back to the landing page.

Enabling/Disabling an Address

Step 1. From the landing page, select the existing End User associated to the address from the dropdown in the end user management panel.

A list of existing addresses associated to that end user will be displayed.

Step 2. From the list of existing addresses, go to the action column and select the edit icon for the address that needs to be enabled or disabled.

Step 3. From the address panel in the address header line, select the **Active** radio button to enable an end user address or the **Inactive** radio button to disable an end user address.

Step 4. A message will display that the record was updated successfully.

Step 5. You may repeat steps 2 and 3 if there are additional addresses for the same end user that need to be enabled/disabled.

Step 6. Hit the **Cancel** button to be brought back to the landing page.

Chapter 11

Bulk Upload

If you are creating many orders, as an alternative to manually entering each order individually, you can use a spreadsheet and bulk upload numerous orders simultaneously.

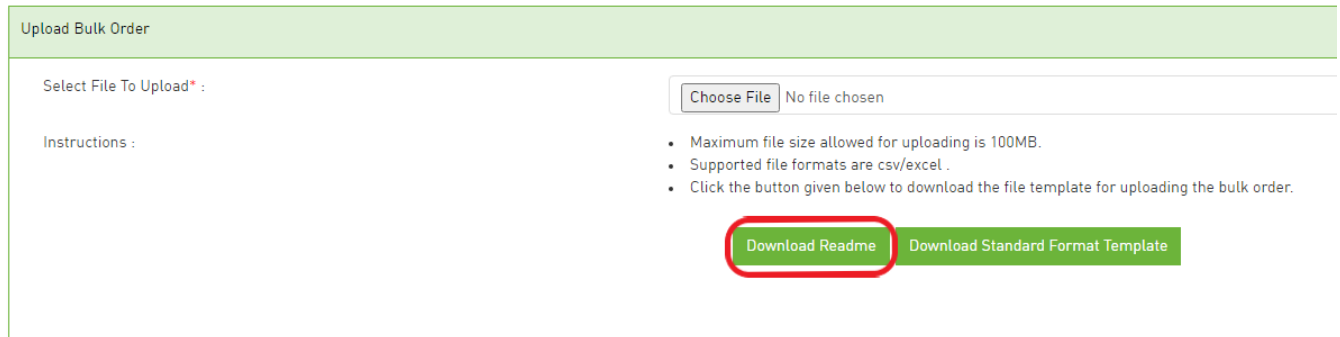
- You must use the UOC GUI templates for the upload
 - You may delete or move columns on the templates with the exception of the 6 fields noted below.
 - You **cannot** change the header label format of any column
- The maximum file size allowed for uploading is 100MB
- There is no restriction on the number of orders allowed for uploading on a single file
- Supported file formats are XLSX, XLS and CSV.
- The use of Bulk Upload is optional.

The following fields are required to upload a bulk order (all other fields are based on the associated catalog):

Field	Valid Values or Format	Notes
action	Valid values are as follows: <ul style="list-style-type: none"> ▪ Save ▪ Submit ▪ cancelOrder 	<ul style="list-style-type: none"> ▪ Save: saves order in draft status ▪ Submit: submits order to the Trading Partner if error free and not held for approval. ▪ cancelOrder: submits a cancel to the Trading Partner if error free and not held for approval.
Activity	Same exact values as displayed in GUI activity dropdown	
universalCatalogName	Same exact values as displayed in GUI for Universal Name.	Required only if there is a Universal enabled in the GUI and it is associated with the Product Catalog otherwise prohibited.
productCatalogName	Same exact values as displayed in GUI for Product Name.	
tradingPartner	TradingPartner Name (from Database not alias as displayed on GUI)	Case Sensitive

UOCOrderId	Same exact value as returned by UOC on the initial order.	<p>When issuing a SUP to an existing order, the value returned by UOC on the initial order is required in this field.</p> <p>On the initial order, a value in the field is prohibited.</p>
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For more information, download the readme file from the GUI on the Upload Bulk Order screen.



Bulk Order Template Export

In order to upload orders using the bulk process, perform the following steps to download a template:

Step 1. On the Main navigation bar, click **Bulk Order**.

Step 2. Select **Download Standard Format Template** button on the Upload Bulk Order screen.

Upload Bulk Order ✕

UOC Order ID:	<input type="text"/>	Universal Catalog	<input type="text" value="UNIVERSAL CATALOG"/>
	OR		
Customer Order ID:	<input type="text"/>	Product Catalog	<input type="text" value="ASSOCIATED PRODUCT C"/>
	OR		
Request Number:	<input type="text"/>	Trading Partner (Seller)	<input type="text"/>
Ignore Blank Fields:	<input checked="" type="checkbox"/>	NC/NCI/SECNCI	<input type="text" value="NC/NCI/SECNCI"/>

Export Order Section :

Universal Order
 Product Order
 Universal & Product Order

Export Field Section :

Include All Fields
 Include All Fields And Default Values
 Exclude Fields With A Default Value

Cancel
Export

Step 3. In the pop-up window, select the criteria for the template; a minimum of 1 option must be selected. The criteria options are as follows:

- A. **Universal Catalog** – Select Universal catalog if you want to use the Universal Catalog fields for the upload. Note: Selecting this option allows you to enter orders associated with the Universal (aka multiple products) on one spreadsheet.
- B. **Product Catalog** – Select Product catalog if you want to use the Product Catalog fields for the upload. This will always export the base product catalog from the Product Catalog section in the admin menu unless a Trading Partner is selected in conjunction with this catalog. Note: Selecting this option allows you to only enter orders for the one product.
- C. **Trading Partner** – Based on which Trading Partner is selected, this will export either
 - a) The base product catalog from the Product Catalog section in the admin menu; or
 - b) The TP Specific Catalog from the trading partner management menu
- D. **UOC Order ID** – Enter the UOC Order ID from an existing order. The Universal and/or Product catalog as well as the Trading Partner associated to that existing order will be used to determine the template to be exported for the bulk upload.
- E. **Customer Order ID** – Enter the Customer Order ID from an existing order. The Universal and/or Product catalog as well as the Trading Partner associated to that existing order will be used to determine the template to be exported for the bulk upload.
- F. **Request Number** – Enter the Request Number (aka PON) from an existing order. The Universal and/or Product catalog as well as the Trading Partner associated to that existing order will be used to determine the template to be exported for the bulk upload.

Step 4. In the pop-up window, select an **Export Order Section** option if one is not auto selected based on step 3

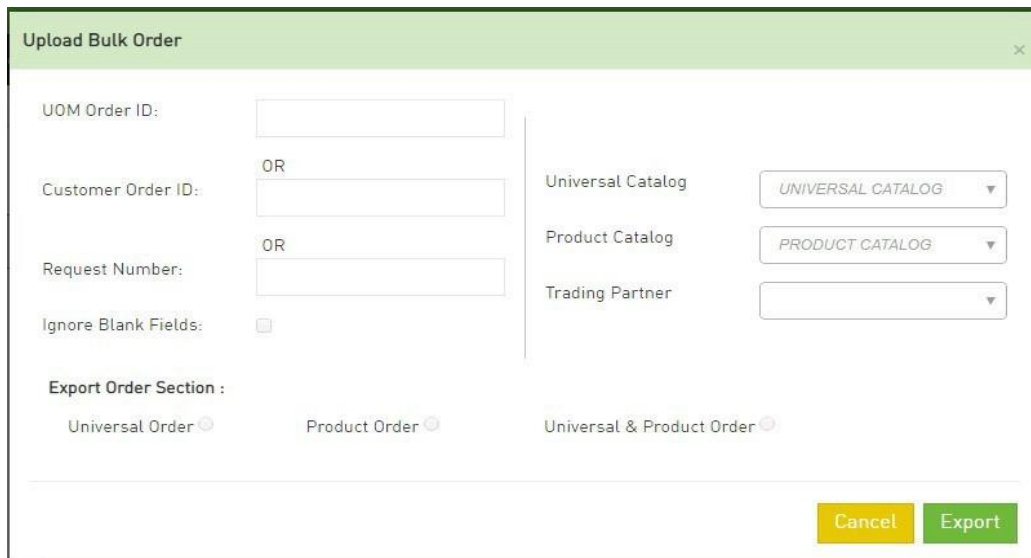
selection:

- A. **Universal Order** – provides a spreadsheet with fields from the Universal Catalog based on the criteria selected in step 3.
- B. **Product Order** – provides a spreadsheet with fields from the Product Catalog based on the criteria selected in step 3.
- C. **Universal & Product Order** – provides a spreadsheet with fields from both the Universal Catalog and Product Catalog based on the criteria selected in step 3.

Step 5. In the pop-up window, select an **Export Field Section** option:

- A. **Include All Fields** – provides a spreadsheet with all fields associated with the catalog selection.
- B. **Include All Fields and Default Values** – provides a spreadsheet with all fields and all default values associated with the catalog selection.
- C. **Exclude Fields with a Default Value** – provides a spreadsheet with only those fields that are not defaulted and may require a value associated with the catalog selection.

Step 6. In the pop-up window, select the **Export** button for the template.



Performing Bulk Order Upload

To perform Bulk Order Upload, follow the below steps:



Step 1. Fill out the fields on the template for each order.

Note: Ensure that the UOC Order ID column is blank on the initial upload. The UOC Order ID value is assigned by UOC.

Step 2. Save the file to your computer using save as type of either XLXS or XLS or CSV.

Step 3. On the Main navigation bar, click **Bulk Order**.

Step 4. Attach the file by selecting **Choose File** on the Upload Bulk Order screen and choose the file that was saved in step 2.

Step 5. Select **Submit** button.

Step 6. A message will appear at the top of the screen with the file name “**File uploaded Successfully : filename.csv**”.

Note: If a field is not populated on a bulk template upon upload but contains a default value in the catalog, the default value will automatically be populated on the order. If you do not want the default value to appear on the order, enter a space in the field on the template which will result in no value being populated on the order for that field.

Important: For fields that start with a numeric value equal to “0”, ensure that the field is formatted as text on the template in order for the “0” to be retained during the upload. For orders that were previously uploaded via the bulk order screen, if you retrieve the spreadsheet from the Success or Error Records column, you will need to re-format the fields that start with the numeric “0” prior to re-uploading.

Searching for a Bulk Order Upload

Perform the following steps to search for Bulk Order Upload:



Step 1. On the Main navigation bar, click **Bulk Order**.

Step 2. You will land on the menu for **Upload Bulk Order** as the default

Step 3. Either select **Search Bulk Order** from the top menu or select **Go to Search Bulk Order** button from the Upload Bulk Order screen.

Step 4. Enter the search criteria and select the **Search** button.

Step 5. From the search results section, find your file name and review the status.

Step 6. If **Failed Count** is greater than 0, go to the Error Records column and download the list of orders in error.

Step 7. The error reason will be contained in the last column for each order.

Step 8. Correct the data that is in error on the file for each order, delete the error column and re-upload the file.

Step 9. Repeat steps 3 through 8 until all orders are uploaded successfully.

Step 10. The successfully uploaded orders shall be visible from the work queue or search result screen.

Bulk Order Search Result (Total Records: 43)									Export As CSV
File Name	Status	Total Count	Success Count	Failed Count	Uploaded By	Upload Time	Completion Time	Success Records	Error Records
StandardFormatTemplate_EVC POINT TO POINT INSTALL_demo5.xlsx	ERROR	2	0	2	tkramer	04/10/2020 12:30:37	04/10/2020 12:30:37		Download
StandardFormatTemplate_EVC POINT TO POINT INSTALL_demo5.xlsx	COMPLETE	2	2	0	tkramer	04/10/2020 12:16:46	04/10/2020 12:16:53	Download	
StandardFormatTemplate_EVC POINT TO POINT INSTALL_demo4.csv	COMPLETE	2	2	0	tkramer	04/10/2020 12:05:00	04/10/2020 12:05:07	Download	

! Important: For SUPs, ensure that the UOC Order Id value that was previously assigned by UOC is populated on the template. For orders that were previously uploaded via the bulk order screen, you can retrieve the UOC Order Id from the Success or Error Records column. The UOC Order ID is also available from the Work Queue and Search results screen from the UOC Order ID column.

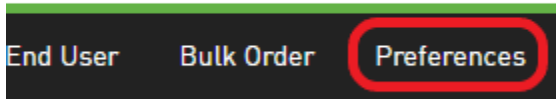
Chapter 12

Preferences

Allows a user to set their own preferences for the following screens:

- Search Order
- Worklist
- Create Order
- Circuit Insights

From the main menu, go to Preferences to change the application or system administrator's default domain settings.



Worklist/Search Order

To add a column to the Worklist or Search Order Screen:

Step 1: Select Preferences in the main menu, go to the Screen drop down and select **Search Order** or **Worklist**.

Step 2: Go to the **Available** box and select the field you want to add to the Search Order result or Worklist screen. The field will be highlighted.

Step 3: Select the button with the single arrow pointing to the **Selected** box to move a single field that is highlighted. If you select the button with the double arrow pointing to the Selected box, then all fields in the **Available** box will be moved.

Step 4: The new fields are now at the end of the **Selected** Box.

To remove a column from the Worklist or Search Order Screen:

Step 1: Select Preferences in the main menu, go to the Screen drop down and select **Search Order** or **Worklist**.

Step 2: Go to the Selected box and select the field you want to remove from your Search Order result or Worklist screen. The field will be highlighted.

Step 3: Select the button with the single arrow pointing to the **Available** box to move a single field that is highlighted. If you select the button with the double arrow pointing to the **Available** box, then all fields in the **Selected** box will be moved.

Step 4: The fields are now at the end of the **Available** Box.

Step 5: Click the **Save** button to retain the change.

To change the order in which columns appear on your Worklist or Search Order Screen:

Step 1: Select Preferences in the main menu, go to the Screen drop-down and select **Search Order** or **Worklist**.

Step 2: Go to the **Selected** box and select the field you want to change. The field will be highlighted.

Step 3a: Select the single up arrow button to move the selected field one field up and repeat until the field is located where you need it.

Step 3b: Select the single down arrow to move the selected field one field down and repeat until the field is located where you need it.

Step 3c: Select the double up arrow to move the selected field to the top (first field).

Step 3d: Select the double down arrow to move the selected field to the bottom (last field).

Step 4: Click the **Save** button to retain the change.

To change the color for the SLA Due (Days) column when an order is in a missed SLA state on your Worklist or Search Order Screen:

Step 1: Select Preferences in the main menu, go to the Screen drop down and select **Search Order** or **Worklist**.

Step 2: Go to the **Select Color for SLA Missed** field. Select the drop down for Fill Color and/or Font Color depending on which one you want to change.

Note: Default is Red Font.

Step 3: In the panel on the right side of the drop down (smaller panel), select the color.

Step 4: In the panel on the left side of the drop down (larger panel), select the color tone.

Step 5: Once the **Fill Color** or **Font Color** box shows the color you want to retain then click outside the drop down to close it.

Step 6: Click the **Save** button to retain the change.

To change the color for the UOC Status column when an order is in an error type of status on your Worklist or Search Order Screen:

Step 1: Select Preferences in the main menu, go to the Screen drop down and select **Search Order** or **Worklist**.

Step 2: Go to the **Select Color for Error Status** field. Select the drop down for Fill Color and/or Font Color depending on which one you want to change.

Note: Default is Red Font.

Step 3: In the panel on the right side of the drop down (smaller panel), select the color.

Step 4: In the panel on the left side of the drop down (larger panel), select the color tone.

Step 5: Once the **Fill Color** or **Font Color** box shows the color you want to retain then click outside the drop down to close it.

Step 6: Click the **Save** button to retain the change.

To change the color for the Request No (PON) column when an order is in an error type or a missed SLA state on your Worklist or Search Order Screen:

Step 1: Select **Preferences** in the main menu, go to the Screen drop down and select Search Order or Worklist

Step 2: Go to the **Select Color for Request No (PON) (Error Status or SLA missing)** field. Select the drop down for Fill Color and/or Font Color depending on which one you want to change. Note: Default is Red Font.

Step 3: In the panel on the right side of the drop down (smaller panel), select the color.

Step 4: In the panel on the left side of the drop down (larger panel), select the color tone.

Step 5: Once the **Fill Color** or **Font Color** box shows the color you want to retain then click outside the drop down to close it.

Step 6: Click the **Save** button to retain the change.

To change the Worklist landing page default for Open Orders from 30 days past DD to another number of days (this is not applicable to the Search Order screen):

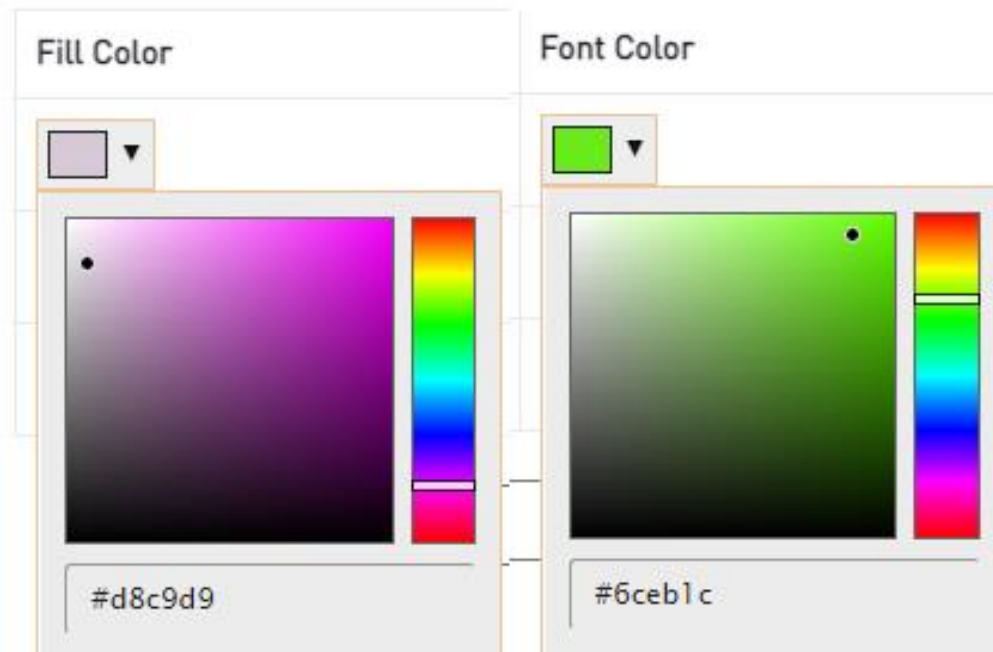
Step 1: Select Preferences in the main menu, go to the Screen drop down and select **Search Order** or **Worklist**.

Step 2: Go to the **Enter # of Days Past DD for Default Open Order** display field.

Step 3: In the open text field, enter the number of days.

Note: Default is 30 days if the text box is blank.

Step 4: Click the **Save** button to retain the change.



Create Order

Change the order in which fields appear on the left panel of the create order screen:

- Step 1: Select Create Order in the main menu and look to see which Order Type is checked in the left panel – Universal or Product
- Step 2: Select Preferences in the main menu, go to the Screen drop down and select **Create Order**.
- Step 3: Go to the **Universal Order Type Drop-Downs Sequence** box or **Product Order Type Drop-Downs Sequence** box based on which Order Type was checked in the Create Order screen in step 1.
- Step 4: Select the field you want to change. The field will be highlighted.
- Step 5a: Select the single up arrow button to move the selected field one field up and repeat until the field is located where you need it.
- Step 5b: Select the single down arrow to move the selected field one field down and repeat until the field is located where you need it.
- Step 5c: Select the double up arrow to move the selected field to the top (first field).
- Step 5d: Select the double down arrow to move the selected field to the bottom (last field).
- Step 6: Click the **Save** button to retain the change.

Circuit Insights

To add a column to the Circuit Insights Screen:

- Step 1: Select Preferences in the main menu, go to the Screen drop down and select **Circuit Insights**.
- Step 2: Go to the **Available** box and select the field you want to add to the Circuit Insights result screen. The field will be highlighted.
- Step 3: Select the button with the single arrow pointing to the **Selected** box to move a single field that is highlighted. If you select the button with the double arrow pointing to the **Selected** box then all fields in the **Available** box will be moved.
- Step 4: The new fields are now at the end of the **Selected** Box.

To remove a column from the Worklist or Search Order Screen:

- Step 1: Select Preferences in the main menu, go to the Screen drop-down and select **Circuit Insights**.
- Step 2: Go to the **Selected** box and select the field you want to remove from your Circuit Insights result screen. The field will be highlighted.
- Step 3: Select the button with the single arrow pointing to the **Available** box to move a single field that is highlighted. If you select the button with the double arrow pointing to the **Available** box, then all fields in the **Selected** box will be moved.
- Step 4: The fields are now at the end of the **Available** Box.
- Step 5: Click the **Save** button to retain the change.

To change the order in which columns appear on your Worklist or Search Order Screen:

- Step 1: Select Preferences in the main menu, go to the Screen drop-down and select **Circuit Insights**.
- Step 2: Go to the **Selected** box and select the field you want to change. The field will be highlighted.
- Step 3a: Select the single up arrow button to move the selected field one field up and repeat until the field is located where you need it.
- Step 3b: Select the single down arrow to move the selected field one field down and repeat until the field is located where you need it.
- Step 3c: Select the double up arrow to move the selected field to the top (first field).
- Step 3d: Select the double down arrow to move the selected field to the bottom (last field).
- Step 4: Click the **Save** button to retain the change.