# Ericsson Order Care

## Realize Higher Consistency for Faster Time-to-Revenue

Order Analytics User Guide

3/1553 - CSH 109 420/1 Uen Rev A

# Contents

# 1 About This Guide

This guide introduces basic Order Analytics (OA) concepts. It describes how to access OA through a personal computer and a Web browser to perform operational reports.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer and a Web browser such as Microsoft Internet Explorer or Mozilla Firefox.

# 2 Overview

The Order Analytics (OA) module provides real-time operational reporting (statistics and measurements) to address all aspects of the end-to-end order fulfillment lifecycle.

All data is collected during the order lifecycle and parsed/assembled into management reports and/or live dashboards.

From the users who touch the orders to the milestones that are completed, timestamps of all activities are stored in our database for immediate retrieval through the configuration of Finders and any field within the order that can be used as search criteria.

Timelines around each activity of the ordering process can be defined from minutes to hours and days, with resultant notification and reporting of those activities in jeopardy or escalated states.

With a 360-degree view of the order lifecycle, Order Analytics ensures that possible order jeopardy conditions are identified and actioned before they become customer impacting (for example, missed due date).

The OA module provides out-of-the box reports for monitoring the health of your Service Orders (in-flight and historical). The reports display in a tables of values or graphical format. OA provides reports and dashboards to compliment ON and OM functionality.


*Figure 1 Order Analytics reports on orders*

# 2.1 OA Functionality

## 2.1.1 OA in a Telco's Operation

Order Analytics (OA) provides decision support and management dashboards that contains reports on order, order parameters and activities performed on orders. Order Analytics provides reports that can be in the form of service level performance, orders, processes, work items and tasks. The reports can be viewed on the OA user interface or can be exported in the form of XLS, .CSV, and .XML.

The OA provides several types of reports:

- Management reports on orders, history, completion, rejections, delays and milestones
- Operational search reports
- Alerts and escalation reports
- Service installation intervals against pre-defined intervals
- Real-time management report dash-boards
- Service fulfillment Service Level Agreement (SLA) measurements

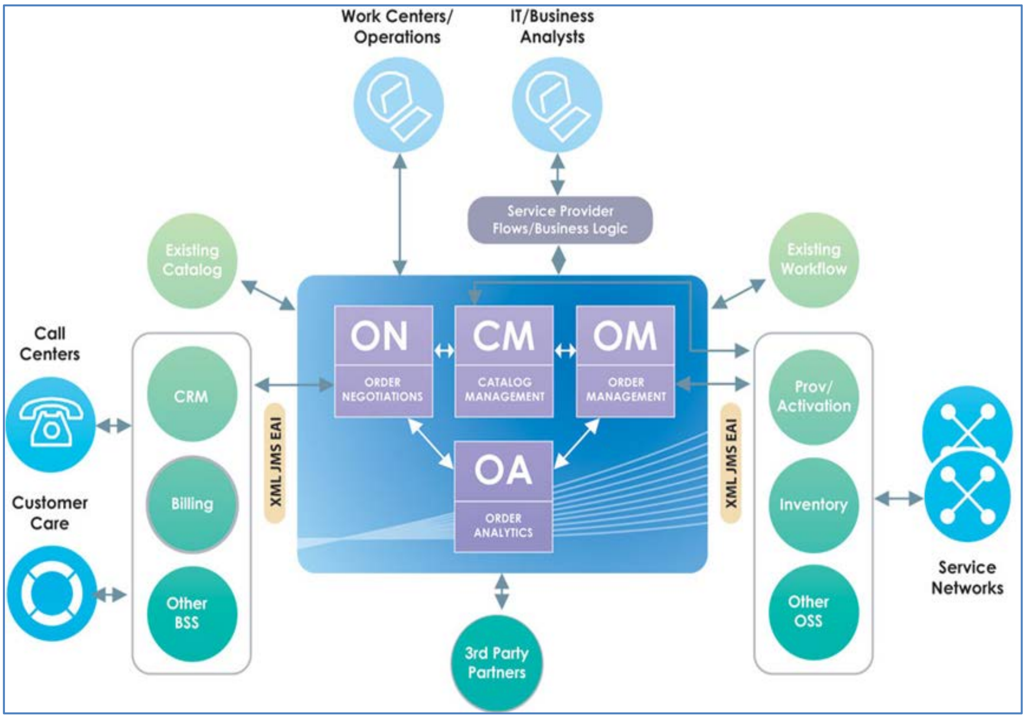



*Figure 2 OA integration*

# 3 Getting Started

This chapter explains how to log in into OA, and provides an orientation to basic OA screen navigation. This section is broken down into the following topics:

## 3.1 Before you begin

OA module is a Web-based application that requires one of the following browsers. It may not work correctly with other browsers.\

| Web Browser | **Version** | **URL** |
|---|---|---|
| **MS Internet Explorer** | 7.0 or later | www.microsoft.com/ie |
| **Mozilla Firefox** | 3.0 or later | www.mozilla.org/firefox |

## 3.2 Access

To access the Order Analytics application, enter the following Web address in your browser:

*http://<hostname>:<port>/cwf/*

Select the **Order Analytics** application from Select Application screen. If the login screen does not load, verify that the URL is correct or contact your system administrator to verify that you have the correct URL.

## 3.3 Multiple Browser Sessions

Opening multiple browser sessions may be helpful in certain scenarios. However, if you do open multiple sessions, be sure that you do not inadvertently open a *shared* session.

A *shared* session occurs if you open a second browser window by selecting **File** > **New** from your current browser session, or if you use shortcuts to access the application URL that do not require you to log in to each instance separately.

If you have multiple windows open, but you logged in only once, then you are sharing sessions and will experience data corruption problems.

If you need to open multiple sessions, use the option from **Start** > **Programs** > **Internet Explorer** or **Firefox** to open separate browser instances

## 3.4 Security

For your security and privacy, after 30 minutes of screen inactivity, your session automatically terminates by logging you out.

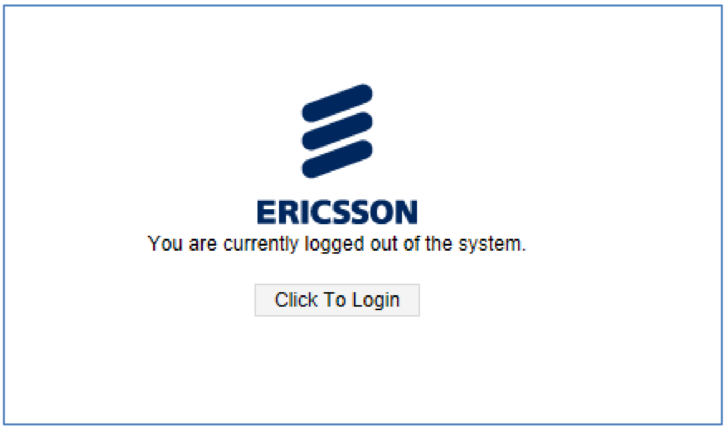



*Figure 3 Automatic logout screen*

## 3.5 Overview of the OA User Interface

This chapter describes the layout of the user interface and presents an overview of the functionality. Topics include:

- Application Layout
- Menu
- Preferences
- Action Menu

### 3.5.1 Application Layout

The Application layout consists of the following general sections:

- Preferences(for exporting reports)
- Menu Bar
- Report Filters
- Result Set Columns
- Report Result
- Action Menu

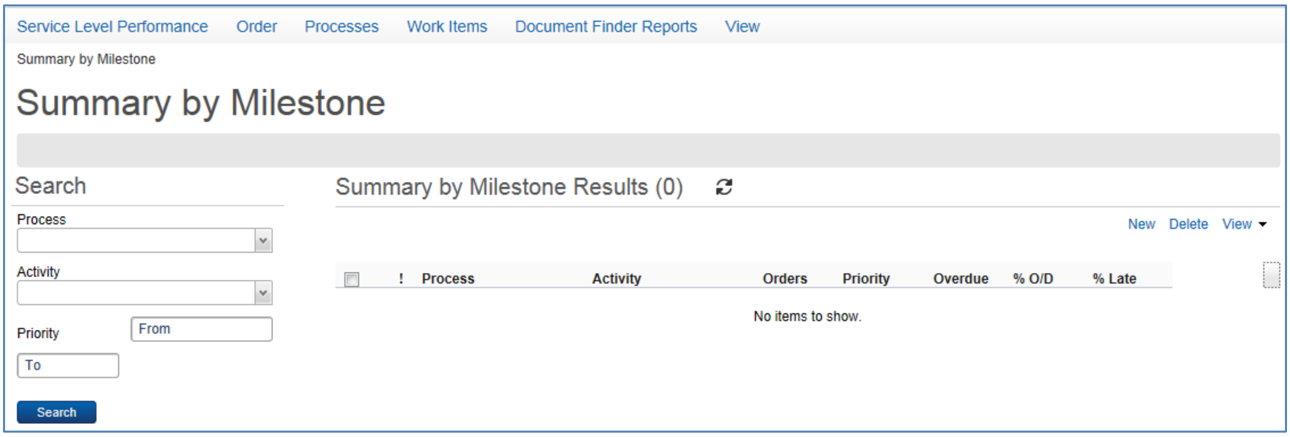



*Figure 4 Order Analytics layout*

### 3.5.1 Preferences

The Preferences icon appears at extreme right side .The preferences option allows you to customize the rows per page and allow you to hide banner.


*Figure 5 Preferences options*

### 3.5.2 Menus

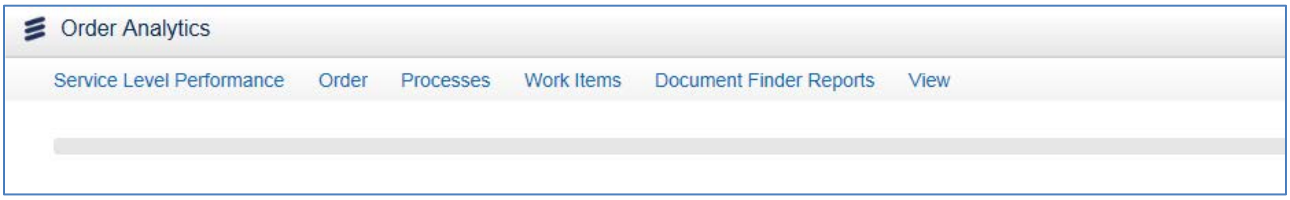



*Figure 6 Menu bar*

Each main menu contains submenu options and features:

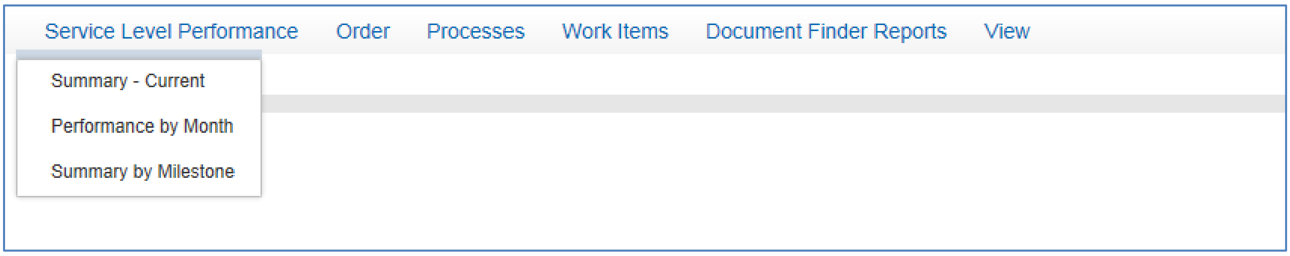



*Figure 7 Menu options*

### 3.5.2.1 Custom Views

The Custom View options allow you to view a custom report generated by a user within your workgroup or allows you to create a report to be viewed by other users in your workgroup. The following sections describe the Custom View options.

#### 3.5.2.1.1 Open Custom View

The Open Custom View option is available in through the vie icon. Custom reports generated and saved for the report that is open by a user within your same user workgroup will appear here. Clicking this button displays the Custom Views for Finders View:

#### 3.5.2.1.2 Add Custom View

The Add Custom View option is available in at the right side below the view icon.. Select Add Custom View option to save the generated report to be viewed by another team member (user within the same workgroup) at a later time.

To add a Custom View, do the following:

1. Select the Report for which you would like to generate a report.
2. If required, hide or display columns by right-clicking the Result Column, selecting **Column** from the menu, and then selecting the Columns to be displayed.
3. Enter the search criteria in the report filters and click the **Search** button.
4. Select **Add Custom View** from the view icon.
5. Configure the report by giving the report a **Label** and entering other pertinent information.
6. When you are done making configuring the report, click the **Save** button.

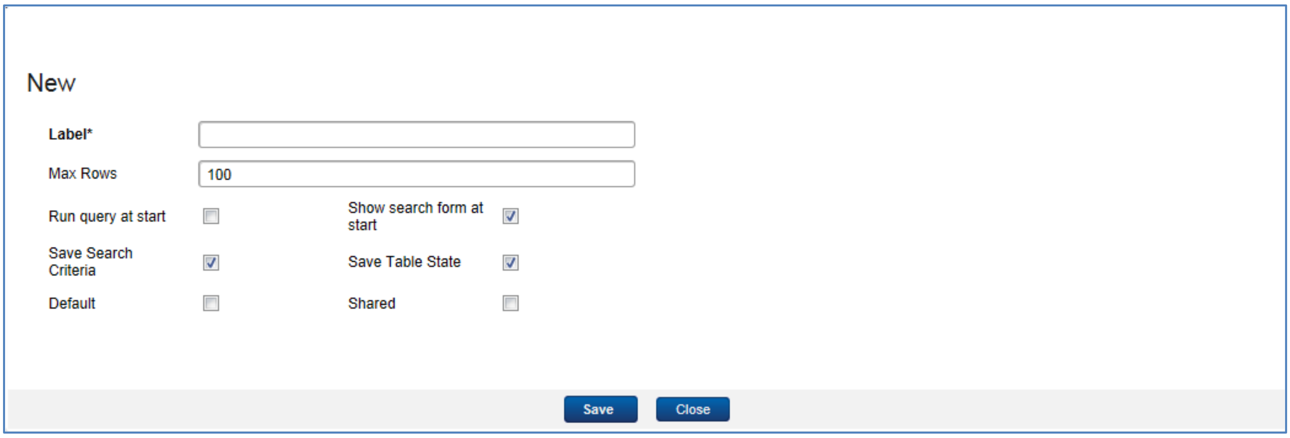



*Figure 8 Configure a custom report*

### 3.5.2.1.3 Edit Custom View

1. Click the **Open Custom View** option from the vie icon.
2. From the Custom Views Finder, select the report by highlighting the report that you want to change, and then click the **Edit** button.

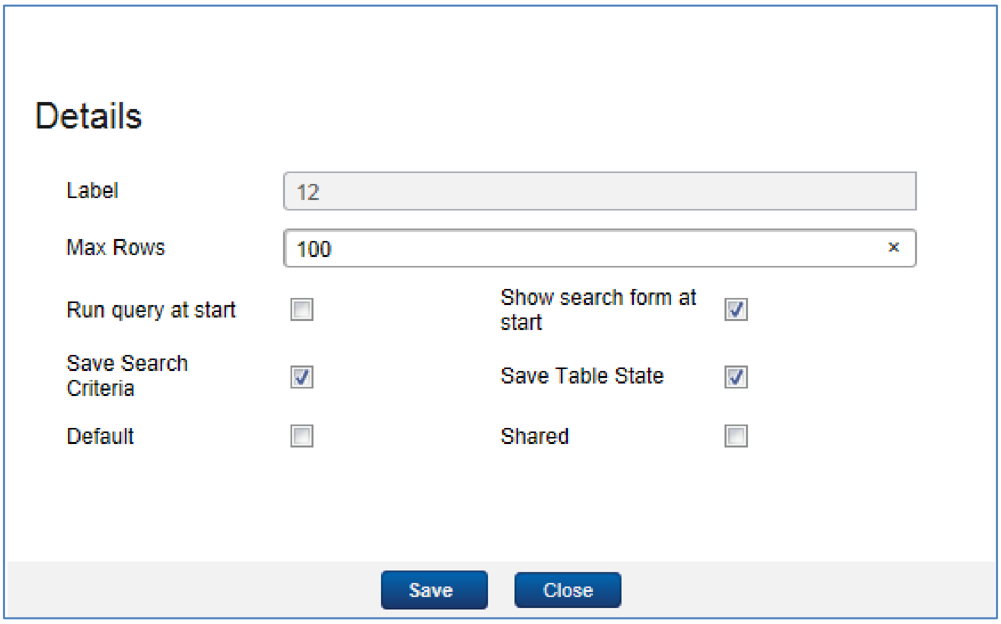



*Figure 9 Change a custom report's settings*

3. Change the report settings and click the **Save** button when you have finished making changes.

**Note:** You cannot the custom report's name.

#### 3.5.2.1.4 Remove Custom View

To remove a Custom View, do the following:

1. Click the **Open Custom View** option from the view icon.
2. From the Custom Views Finder, highlight the report that you want to remove, and then click the **Remove** button.

#### 3.5.2.1.5 View Custom Report

To view a custom report, do the following:

1. Click the **Open Custom View** option from the view icon.
2. Highlight the report that you want to view and click the **Select** button**.**

### 3.5.3 Report Filters

The Report Filters area is used to capture user input to filter the report results.

### 3.5.4 Result Columns

The Result Columns contains the headers for the result rows which dictate the result field values that are displayed. The Result Columns feature can be used to customize the way your Results table appears. You may customize the visibility of specific columns, as well as their sort order. Clicking a header will sort the results by that column.

#### 3.5.4.1 Change Result Columns

To change the results columns, do the following:

1. Right-click the Results Column.

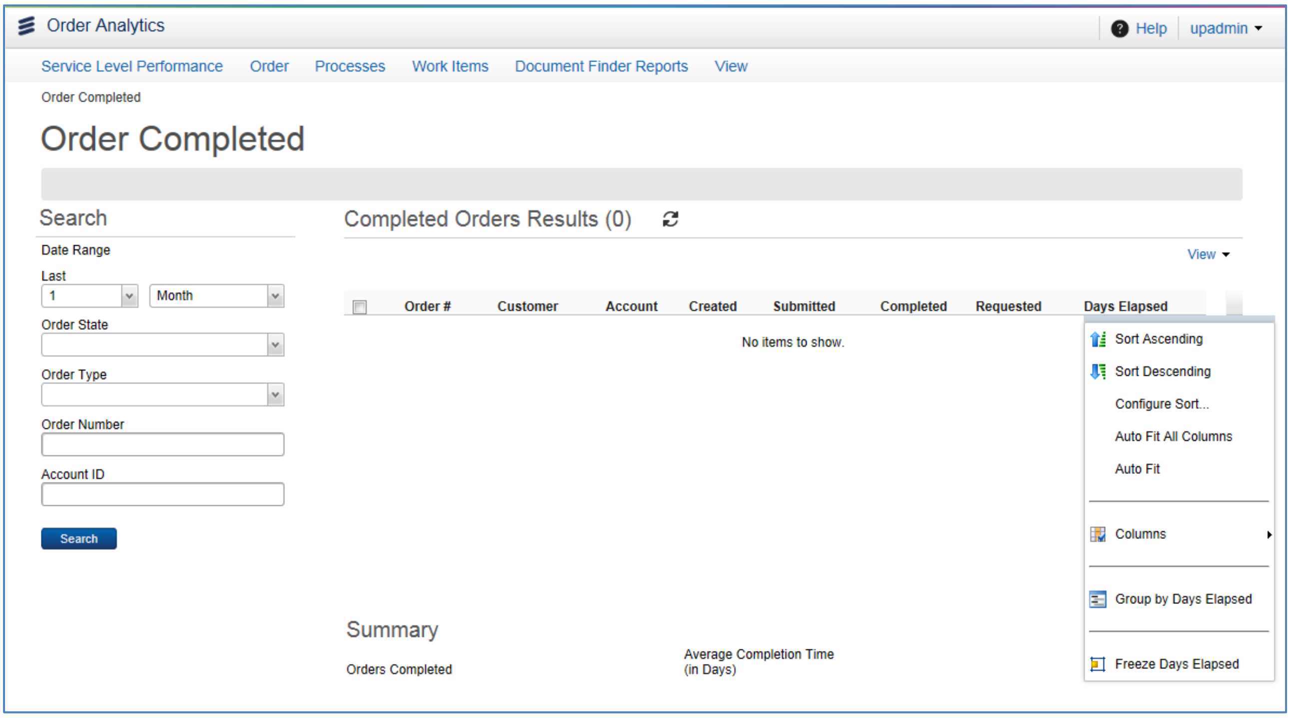



*Figure 10 Completed Orders*

2 Select **Columns** from the menu, and then select or unselect the column names to be displayed. In the example, the **Order Number** and **Order State** columns are hidden. The remaining columns are displayed.

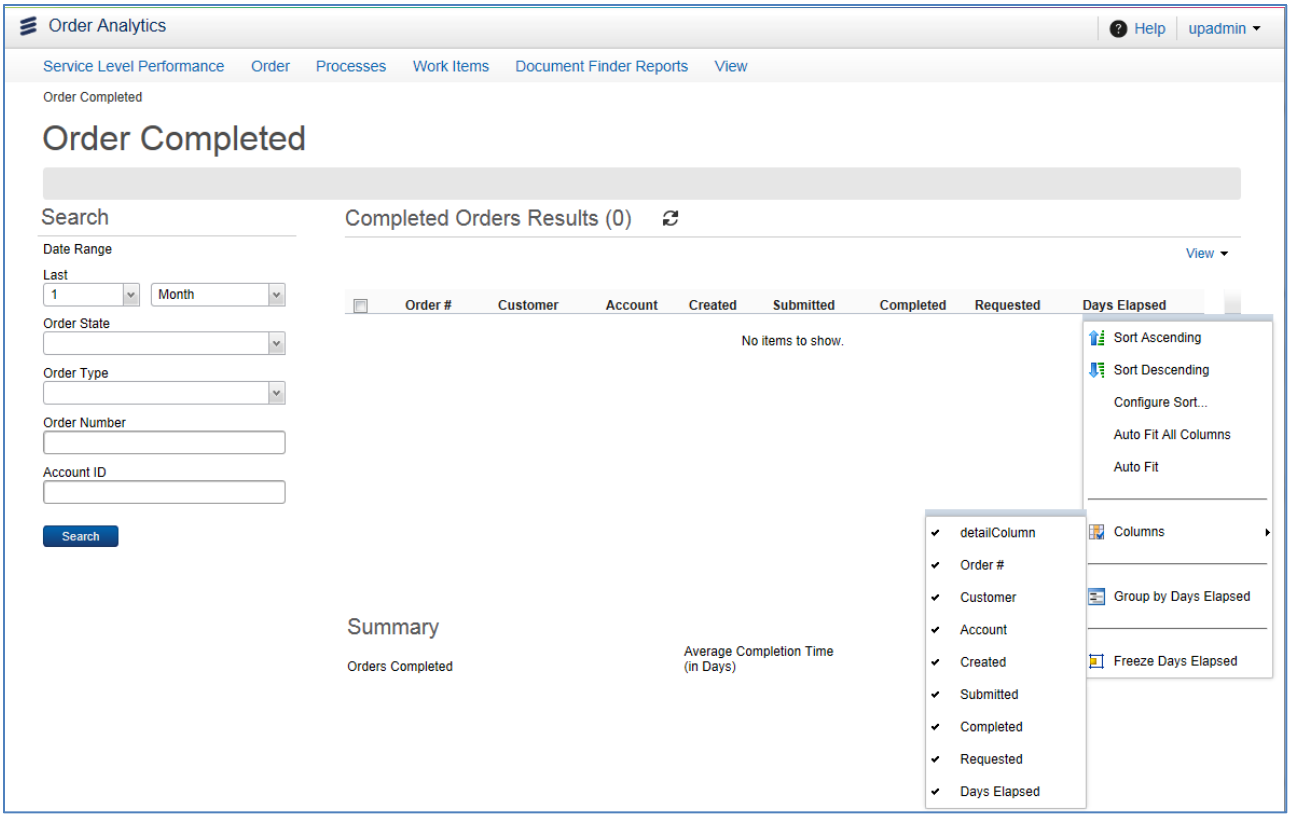


*Figure 11: Hiding columns in Completed Order report*

3 The selected columns display and the unselected columns are hidden. The search results values for the hidden columns are also not shown.

**Note:** The configuration for a report through the Results Column feature is temporary and lasts for that specific session only. A permanent configuration can be saved as a Favorite (Custom View).

### 3.5.5 Results

The result tables contain the rows of data that match the search criteria.

# 4 Use Order Analytics

This chapter explains each report type in detail:

## 4.1 Report Types:

Reports come in two flavours:

- Table of Values:

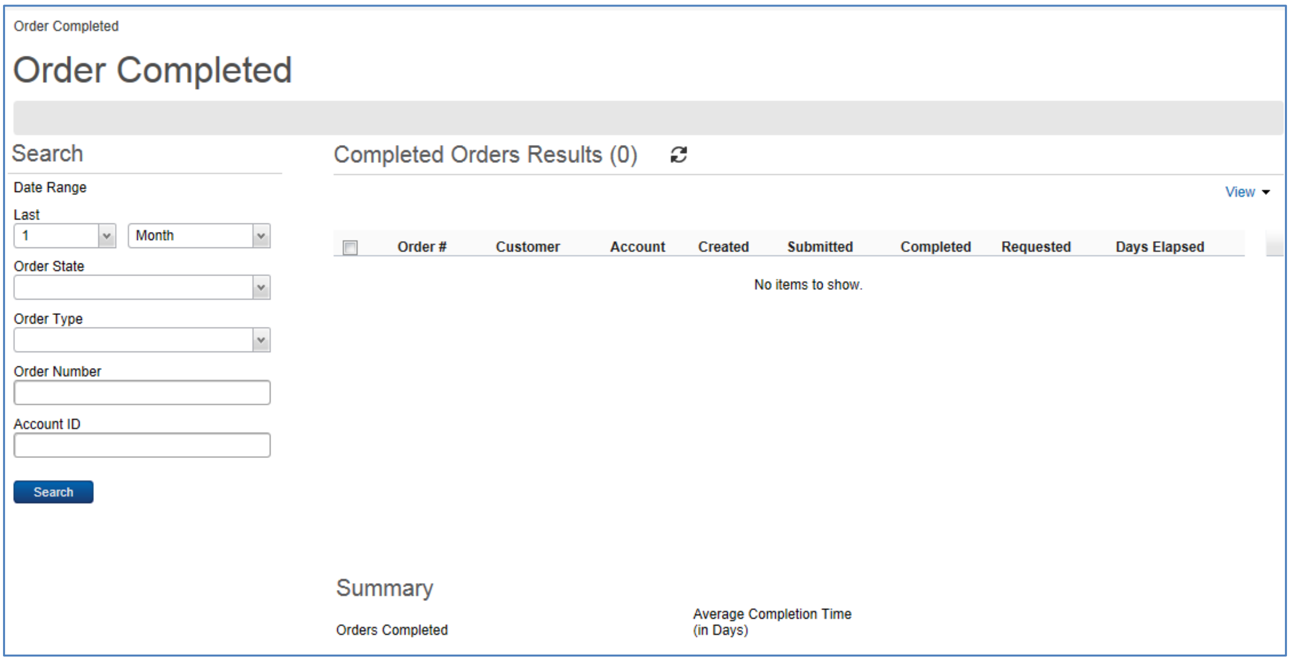



*Figure 12 Order Completed*

The majority of reports are shown in a table of value format.

- Graphical Reports:

  The system provides two reports in a graphical bar chart format:

  - Work Item Summary by Workgroup
  - Task Work Item Summary by Workgroup
  - Performance by Month

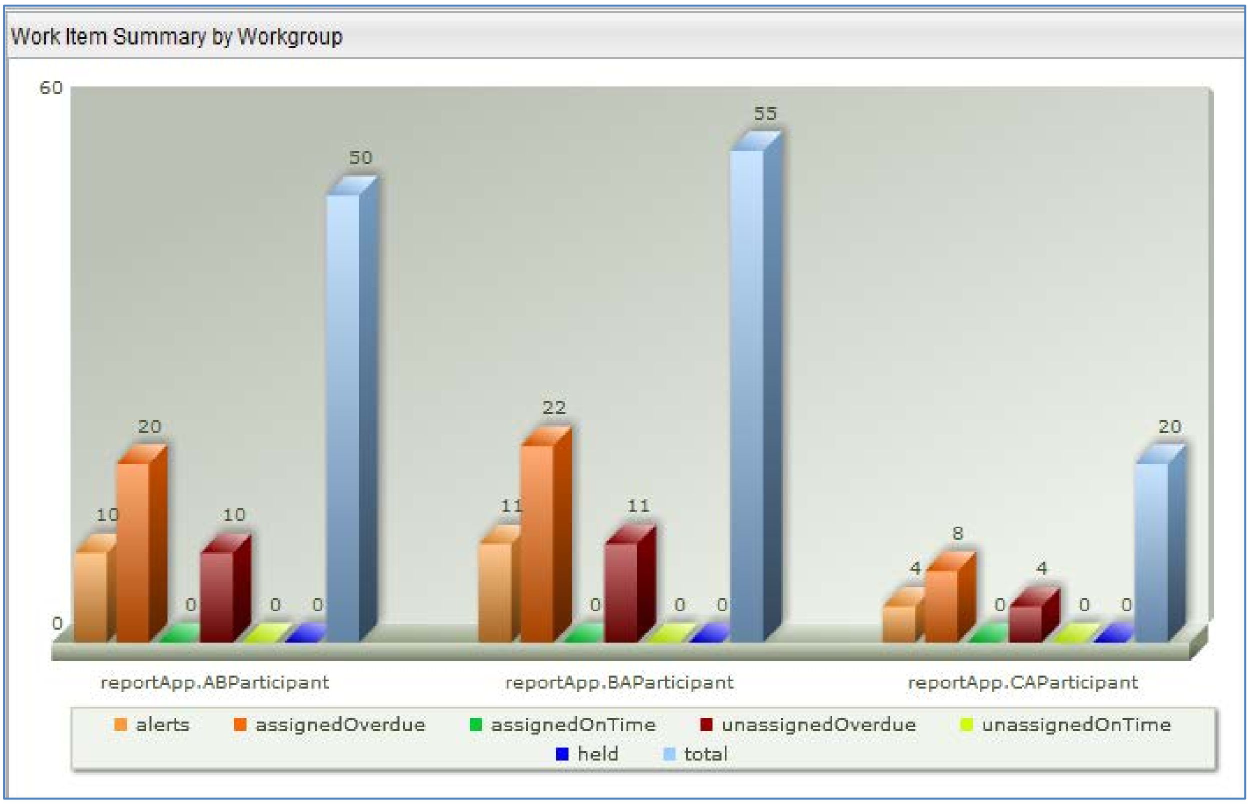



*Figure 13 Work Item Summary by Workgroup Bar Graph*

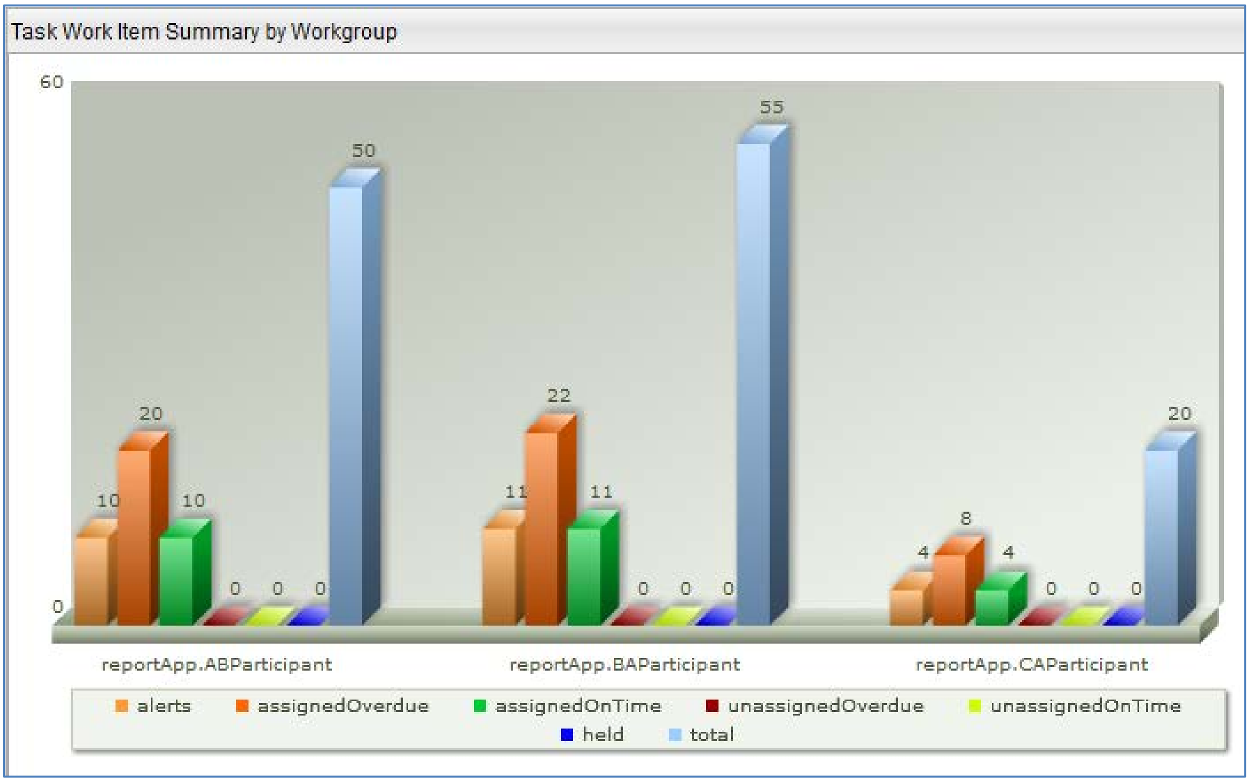



*Figure 14 Task Work Item Summary by Workgroup Bar Graph*

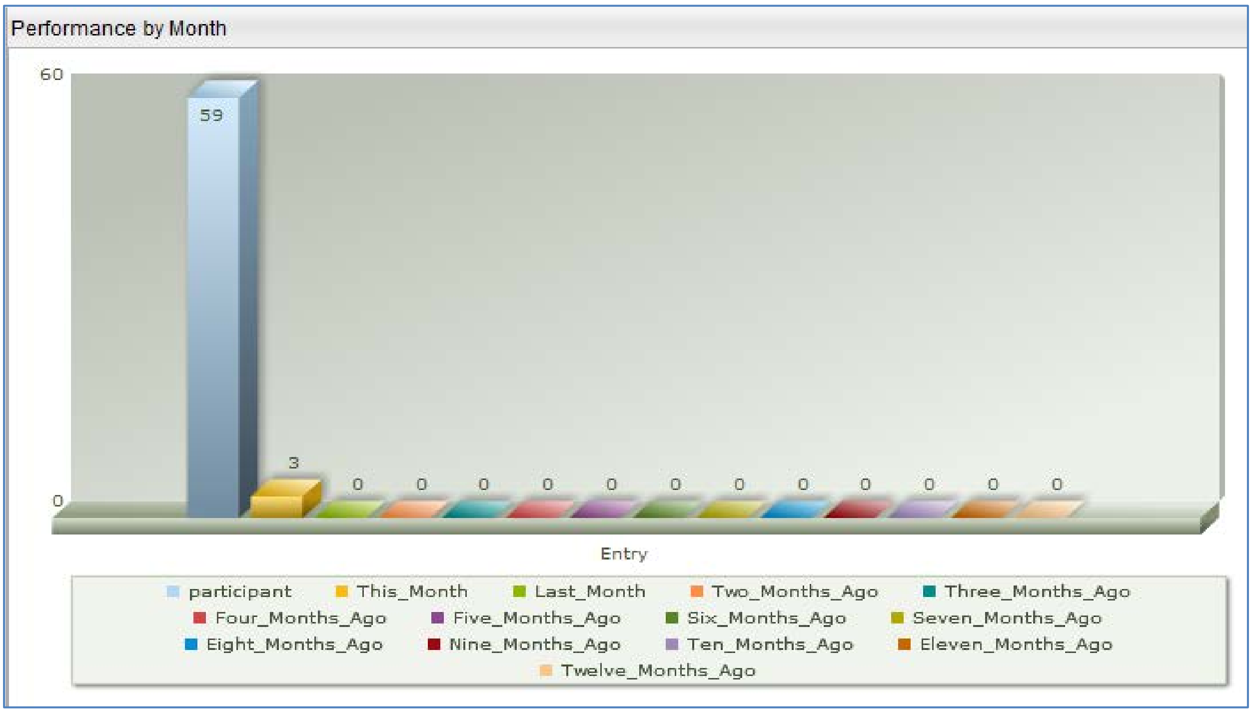
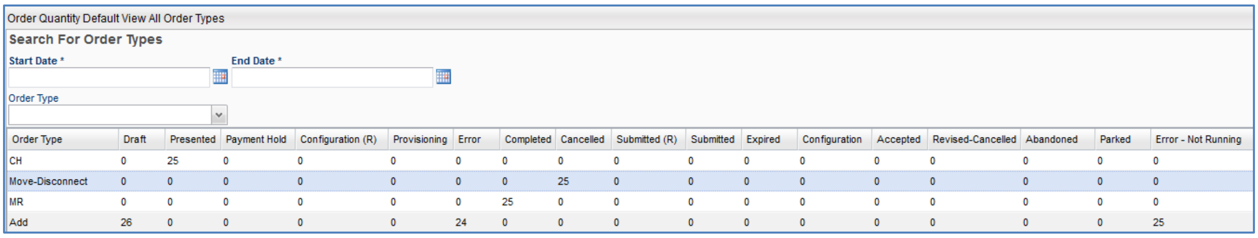



*Figure 15 Performance by Month Bar Graph*

## 4.2 Table of Values

The majority of the reports are displayed in a table of values format. This format contains results columns and search results values.


Order Quantity Default View All Order Types

Search For Order Types

Start Date *

End Date *

Order Type

| Order Type | Draft | Presented | Payment Hold | Configuration (R) | Provisioning | Error | Completed | Cancelled | Submitted (R) | Submitted | Expired | Configuration | Accepted | Revised-Cancelled | Abandoned | Parked | Error - Not Running |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CH | 0 | 25 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Move-Disconnect | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 25 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| MR | 0 | 0 | 0 | 0 | 0 | 0 | 25 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Add | 26 | 0 | 0 | 0 | 0 | 24 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 25 |

*Figure 16 Table of Values results for Order Quantity Default View All Order Type*

# 5 Order Analytics Reports

## 5.1 Service Level Performance

This section contains the Service Level Performance reports.

### 5.1.1 Summary - Current

This report displays all Process Milestones and can be accessed by clicking **Service Level Performance** > **Summary – Current** from the menu.

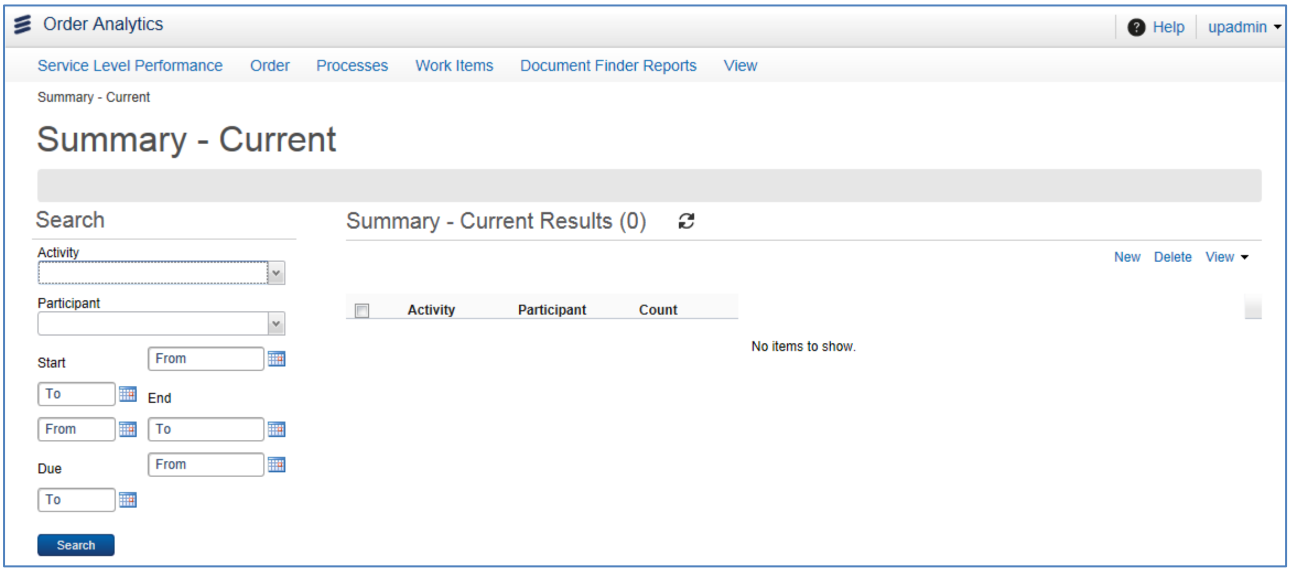



*Figure 17 Summary - Current*

Selection Criteria:

You may filter your search results by a specific Activity, Participant, Start / End Dates, and Due Dates.

### 5.1.2 Performance by Month

This Report displays all Process Milestones by Month, for the last 12 months and can be accessed as follows from the menu options: **Service Level Performance** > **Performance by Month**


*Figure 18 Performance by Month*

Selection Criteria:

You may filter your search results by a specific Activity and Participant.

### 5.1.3 Summary by Milestone

This report summarizes all milestones: the total quantity, those which are Overdue/late, and the percentage of those that are overdue and can be accessed as follows from the menu options: **Service Level Performance** > **Summary by Milestone**

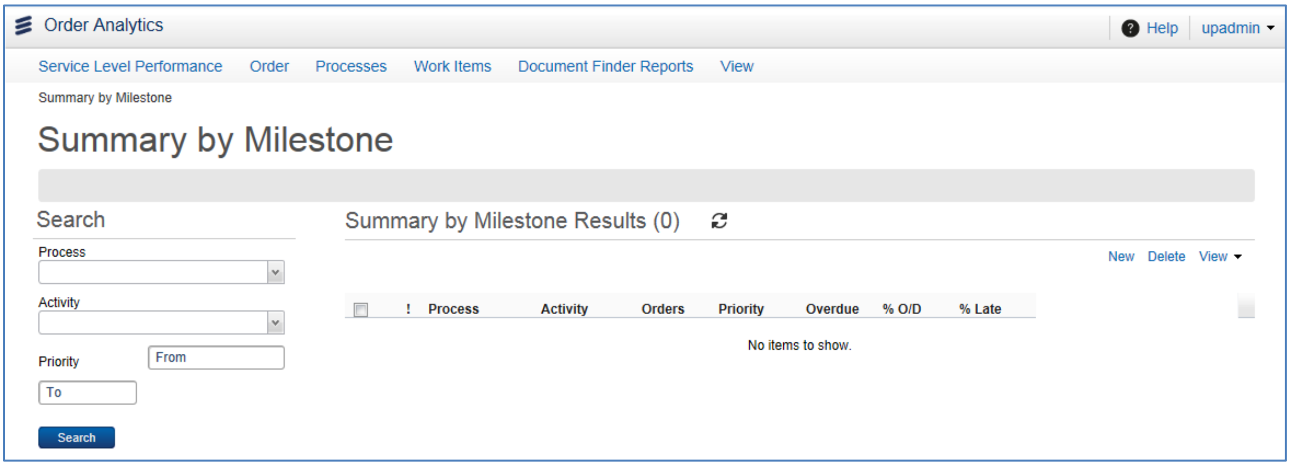



*Figure 19 Summary by Milestone*

Selection Criteria:

You may filter on the Process, Activity and Priority level.

# 5.2 Order Reports

## 5.2.1 Orders Completed

This report displays completed orders. To access this report, click **Order** > **Orders Completed** from the menu bar.

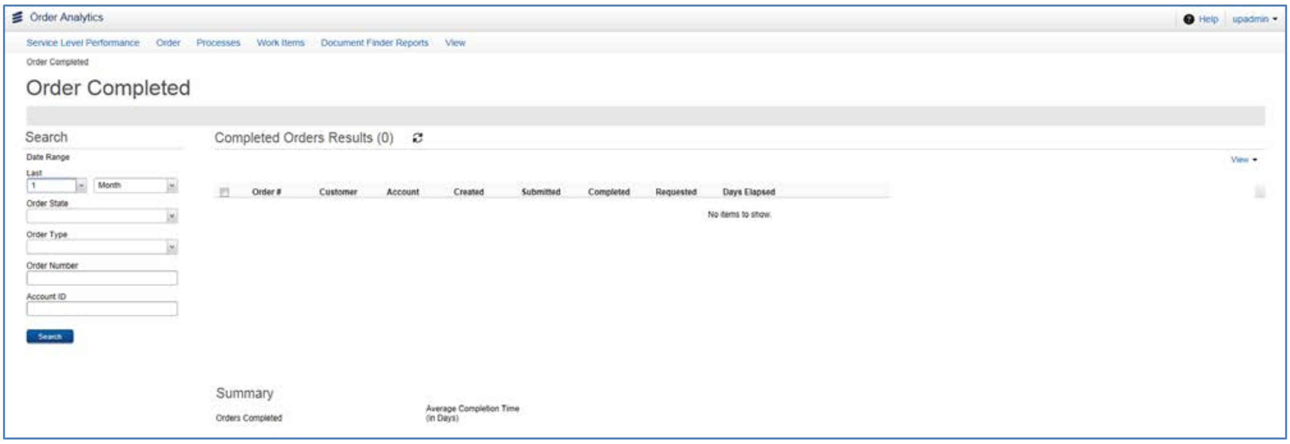



*Figure 20 Order Completed report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

## 5.2.2 Order Details View for Order State

This report displays order details for a specific period. To access this report, click **Order** > **Order Detail for Order State** from the menu bar.

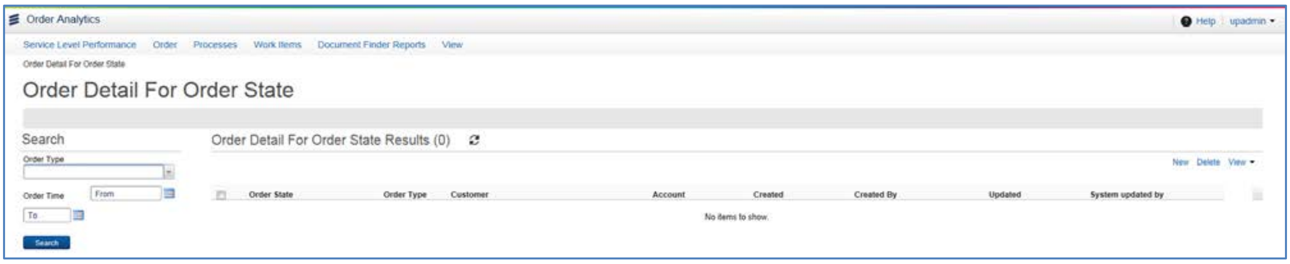



*Figure 21 Order Details View for Order State*

Selection Criteria:

You must select a specific period which filters orders. Additional optional filters include Order Type.

### 5.2.3 Order Details Search for Order Type

This report displays order details for a specific period. To access this report, click **Order** > **Order Details for Order Type** from the menu bar.

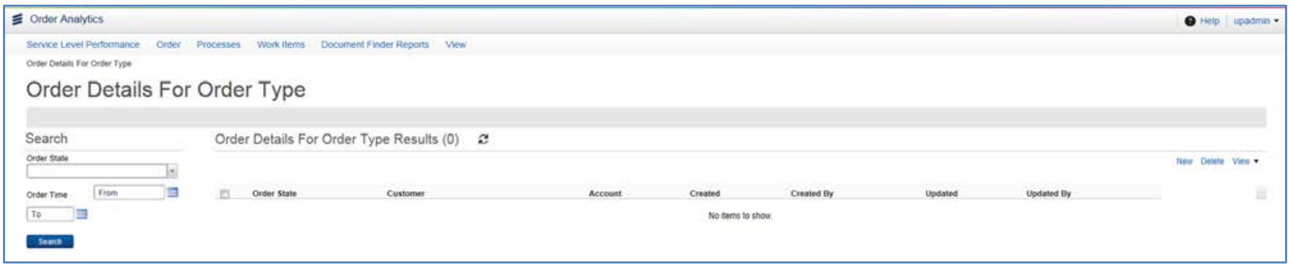



*Figure 22 Order Details Search for Order Type*

Selection Criteria:

You must select a specific period which filters orders. Additional optional filters include Order State

### 5.2.4 Order Detail of Error Orders for Order Type

This report displays order details for a specific period which have errors. To access this report, click **Order** > **Order Details of Error Orders for Order Type** from the menu bar.

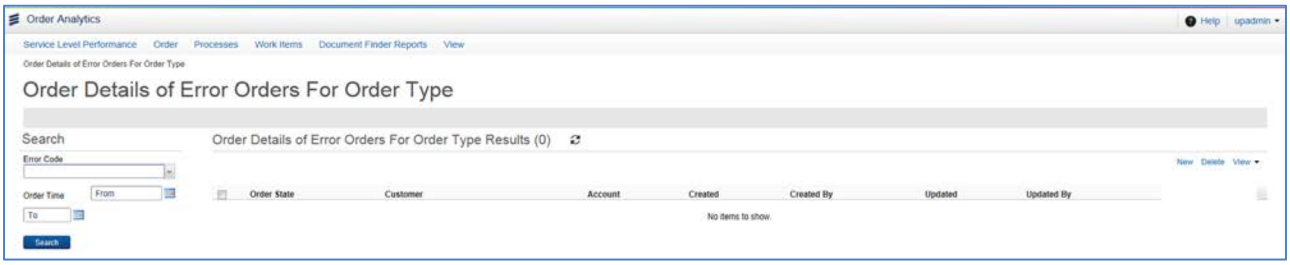



*Figure 23 Order Details of Error Orders for Order Type*

Selection Criteria:

You must select a specific period which filters orders. Additional optional filters include Error Code.

### 5.2.5 Received Orders Finder

This report displays received orders for a specific period which have errors. To access this report, click **Order** > **Received Order Finder** from the menu bar.

Selection Criteria:

You must select a specific period which filters received orders. Additional optional filters include Order State, Order Type, Order Number and Account.

### 5.2.6 Order Quantity Finder All Order Types

This report displays order quantities across all order types for a specific period which have errors. To access this report, click **Order** > **Quantity Order Finder All Order Types** from the menu bar.


*Figure 24 Order Quantity Finder All Order Types*

Selection Criteria:

You must select a specific period which filters orders. Additional optional filters include Order Type.

### 5.2.7 Order Quantity Finder All Order States

This report displays order quantities across all order states for a specific period which have errors. To access this report, click **Order** > **Quantity Order Finder All Order States** from the menu bar.

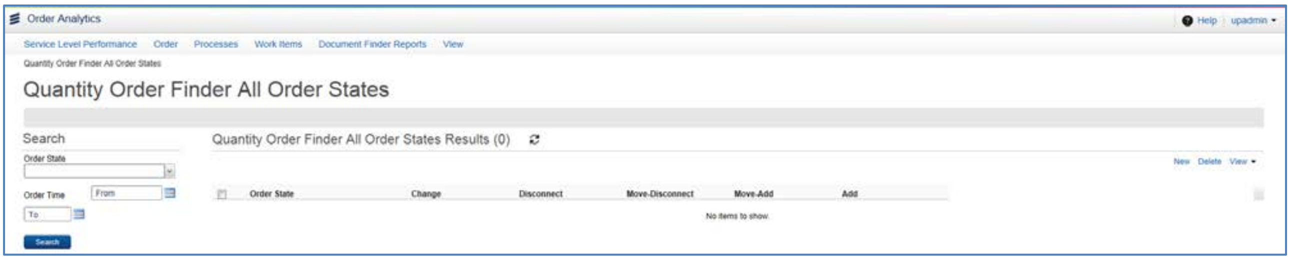



*Figure 25 Order Quantity Finder All Order States*

Selection Criteria:

You must select a specific period which filters orders. Additional optional filters include Order State.

### 5.2.8 Order Quantity with Error Orders for all Order States

This report displays order quantities across all order states for orders in error for a specific period which have errors. To access this report, click **Order** > **Quantity with Error Order Finder All Order Types** from the menu bar.

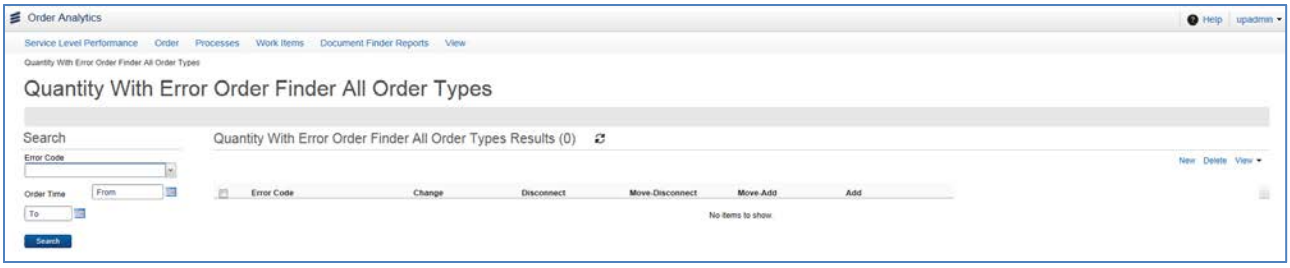



*Figure 26 Order Quantity with Error Orders for all Order States*

Selection Criteria:

You must select a specific period which filters orders. Additional optional filters include Error Code.

### 5.2.9 Overdue Orders

This report displays overdue orders. To access this report, click **Order** > **Overdue Order Finder** from the menu bar.

Selection Criteria:

You are required to select a specific Overdue Date (mandatory). Additional Optional Filters included Order State, Order Type, Order Number and a Created date range.

### 5.2.10 Mean Time Difference between Requested Delivery Date and Planned Date

This report shows the mean difference between the requested delivery and planned dates in days. To access this report, click **Order** > **Mean Time Difference between Requested Delivery Date and Planned Date** from the menu bar.

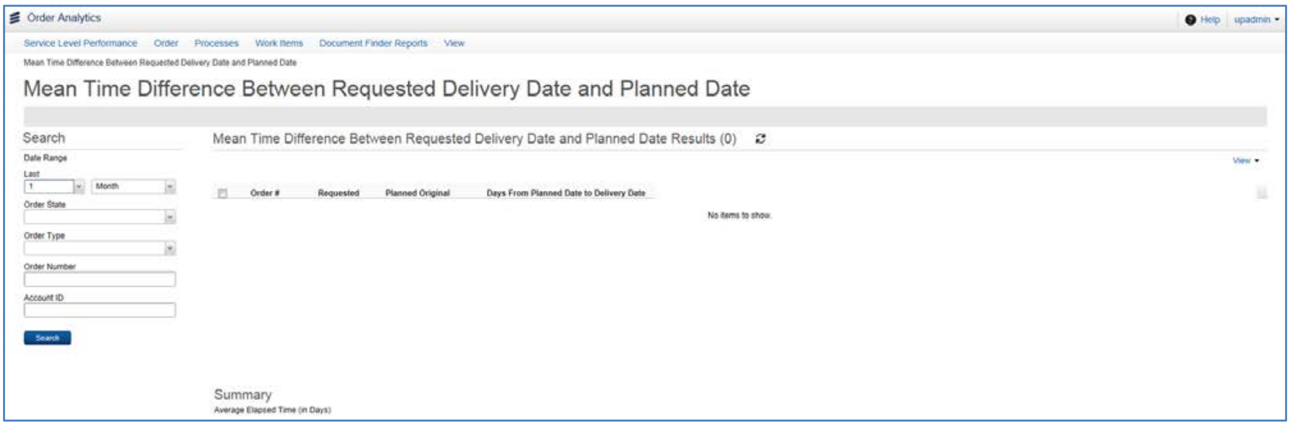



*Figure 27 Mean Time Difference between Requested Delivery Date and Planned Date report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

### 5.2.11 Percentage of Orders Delivered by Committed Date

This report shows the percentage of orders that have been delivered by the specified committed date. To access this report, click **Order** > **Percentage of Orders Delivered by Committed Date** from the menu bar.

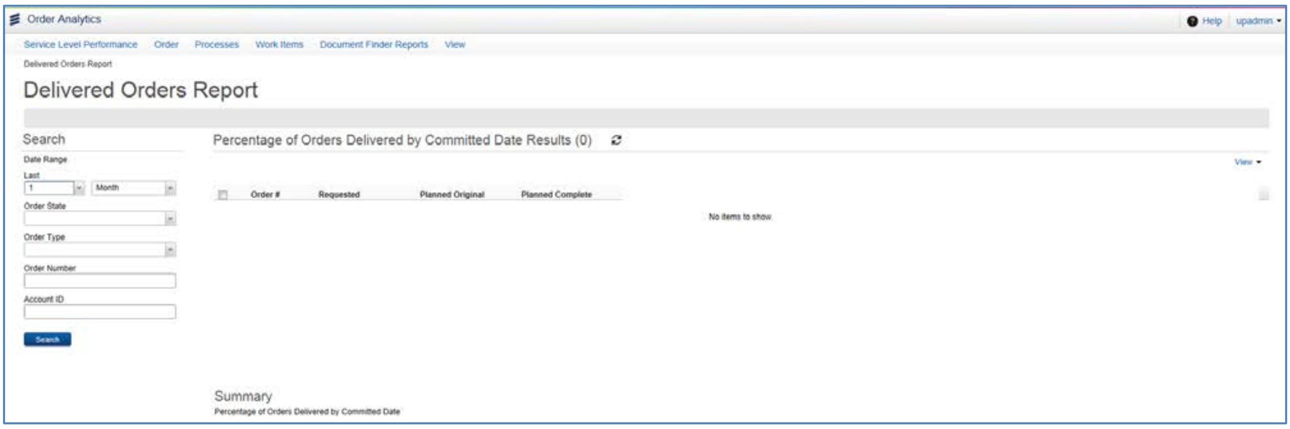



*Figure 28 Delivered Orders report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

### 5.2.12 Average Time from Order Date to Customer Acceptance Date

This report shows the average time needed between the order date and the date in which the customer accepts the order. To access this report, click **Order** > **Average Time from Order Date to Customer Acceptance Date** from the menu bar.

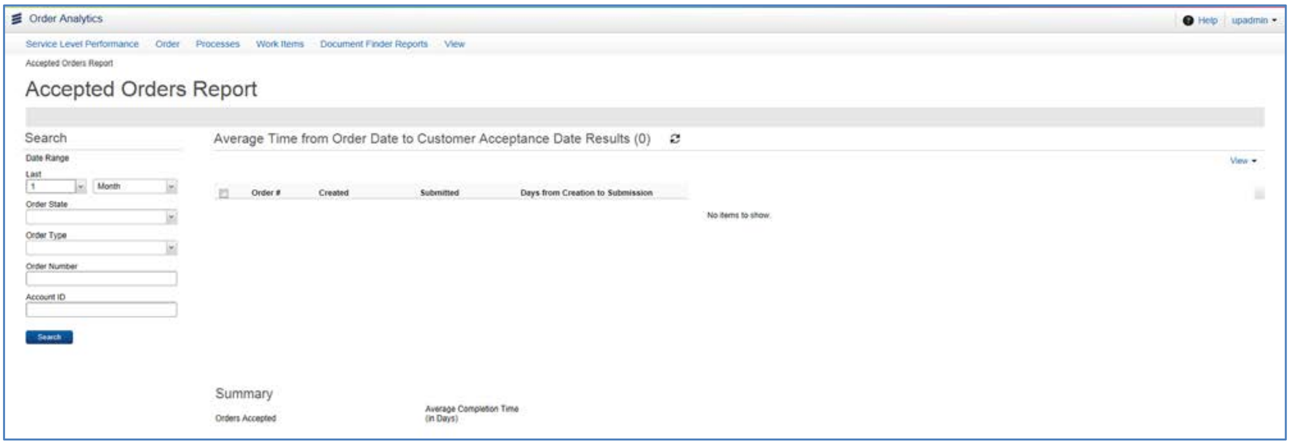



*Figure 29 Accepted Orders report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

## 5.2.13 Duration from Request to Confirmation

This report shows the time between making an order request and confirming the order. To access this report, click **Order** > **Duration from Requested to Confirmed Order** from the menu bar.

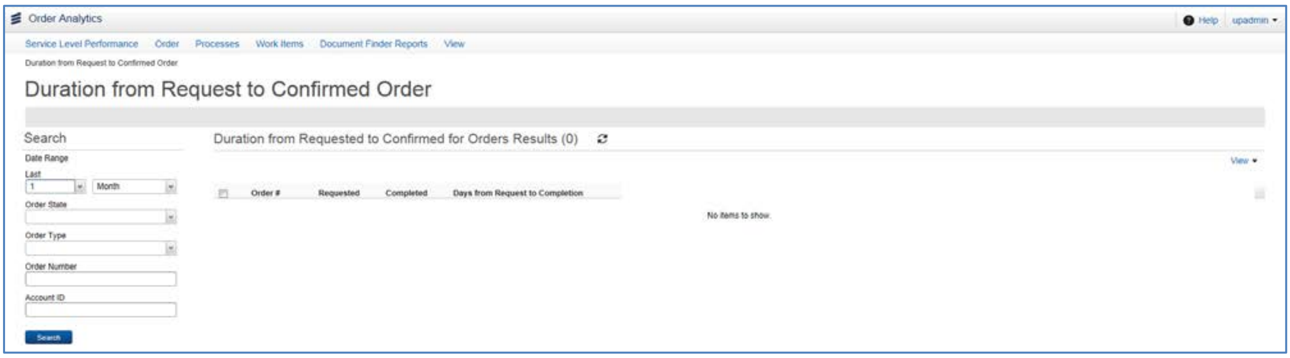



*Figure 30 Duration from Request to Confirmed Order report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

### 5.2.14 Mean Time for Defects

This report shows the mean time to handle order defects. To access this report, click **Order** > **Mean Time for Defects** from the menu bar.

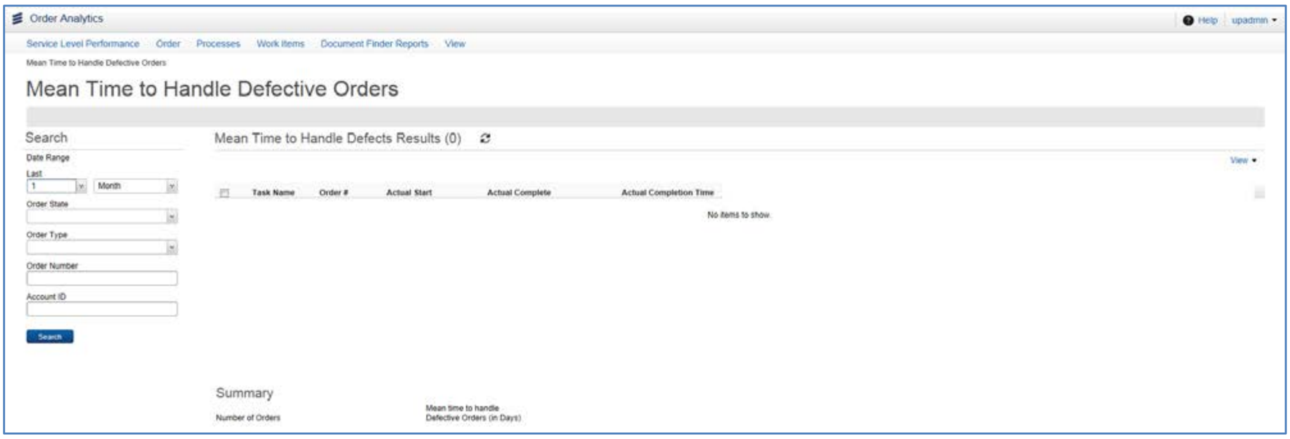



*Figure 31 Mean Time to Handle Defective Orders report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

### 5.2.15 Percent of Orders Requiring Rework

This report shows the percentage of orders that require rework. To access this report, click **Order** > **Percent of Orders Requiring Rework** from the menu bar.

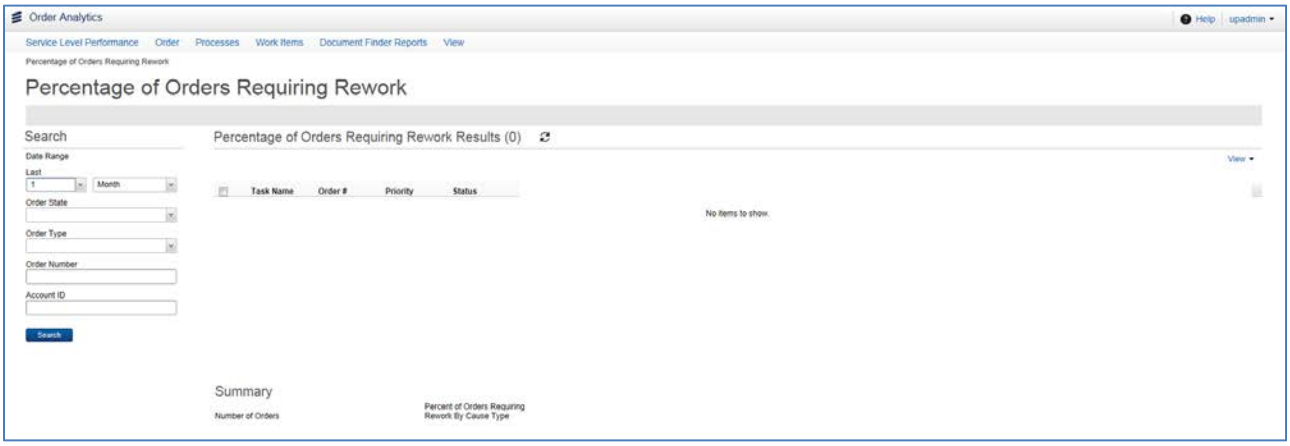



*Figure 32 Percentage of Orders Requiring Rework report*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**

### 5.2.16 Percent of Orders Requiring Rework by Cause

This report shows the mean time to handle order defects. To access this report, click **Order** > **Percent of Orders Requiring Rework by Cause** from the menu bar.

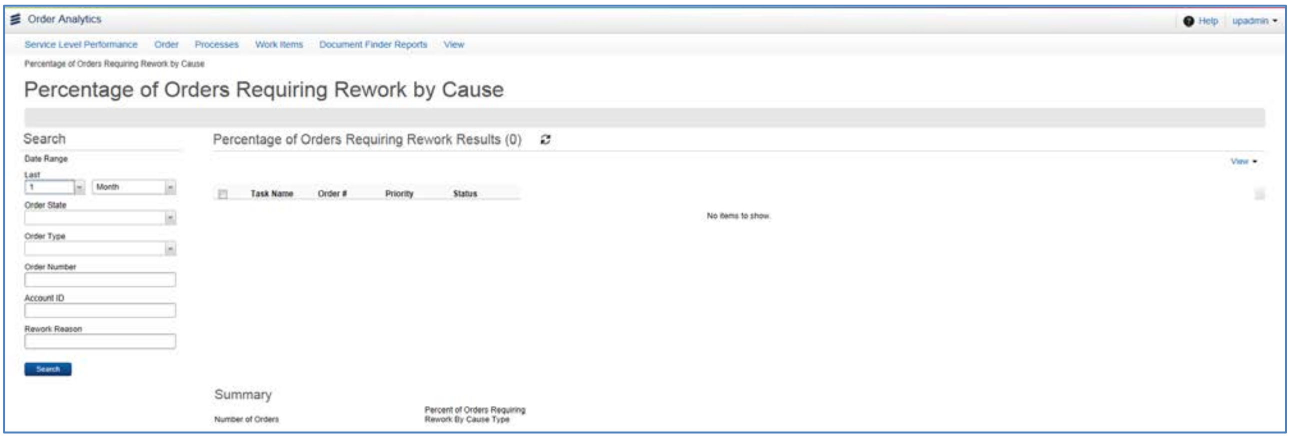



*Figure 33 Percentage of Orders Requiring Rework by Cause*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Order Number**
- **Account ID**
- **Rework Reason**

### 5.2.17 Revenue by Channel

This report shows the generated revenue by channel. To access this report, click **Order** > **Revenue by Channel** from the menu bar.

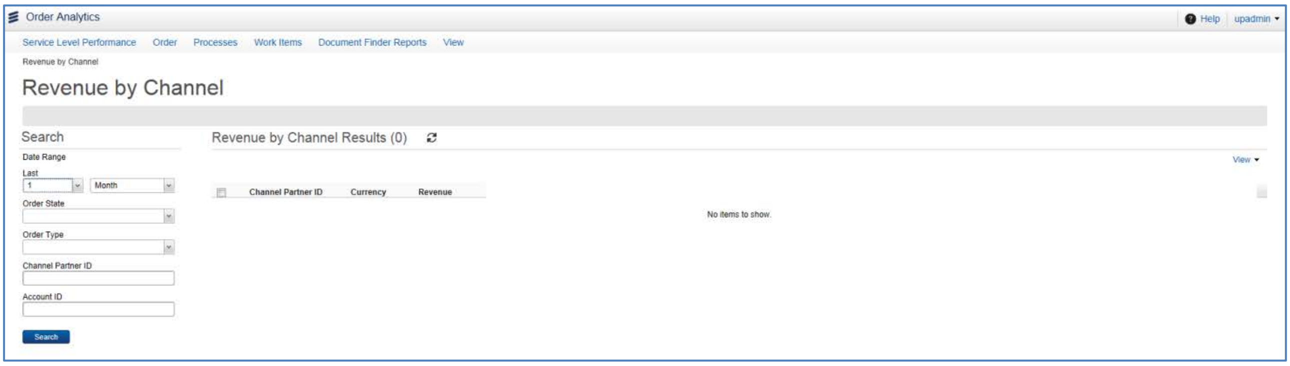



*Figure 34 Revenue by Channel*

You can specify the following search criteria before you click the **Search** button:

- **Date Range**
- **Order State**
- **Order Type**
- **Channel Partner ID**
- **Account ID**

## 5.3 Process Reports

### 5.3.1 Processes - Started

This report displays processes started in a specific period and can be accessed as follows from the menu options: **Processes** > **Started**

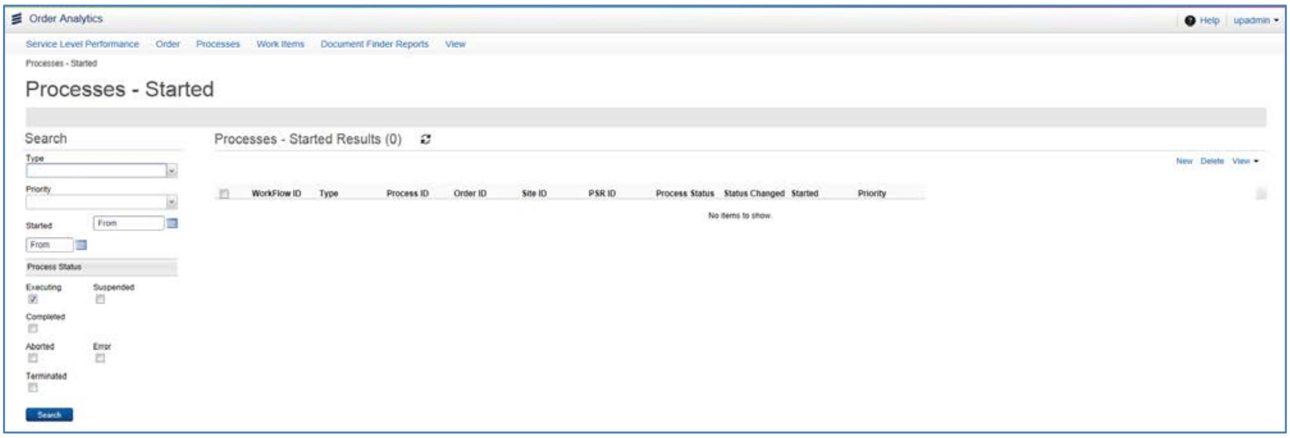



*Figure 35 Process-Started*

Selection Criteria:

You must specify a Period during which processes were started. Additional optional filters include Task Type, Priority and Process Status.

### 5.3.2 Processes – Completed

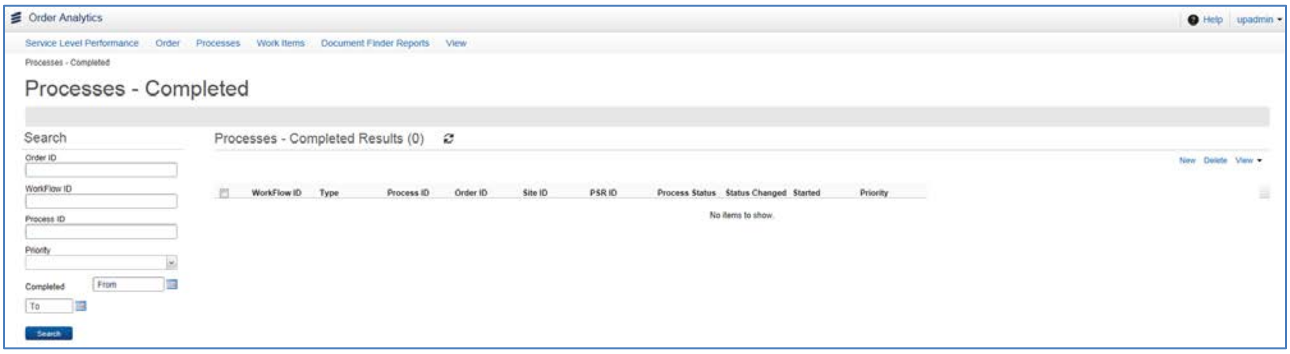



*Figure 36 Process-Completed*

Selection Criteria:

You must specify a Period during which processes were completed. Additional optional filters include Order ID, WorkFlow ID, Process ID and Priority

### 5.3.3 Process - In Error

This reports displays processes with errors in a specific period and can be accessed as follows from the menu options: **Processes** > **In Error**

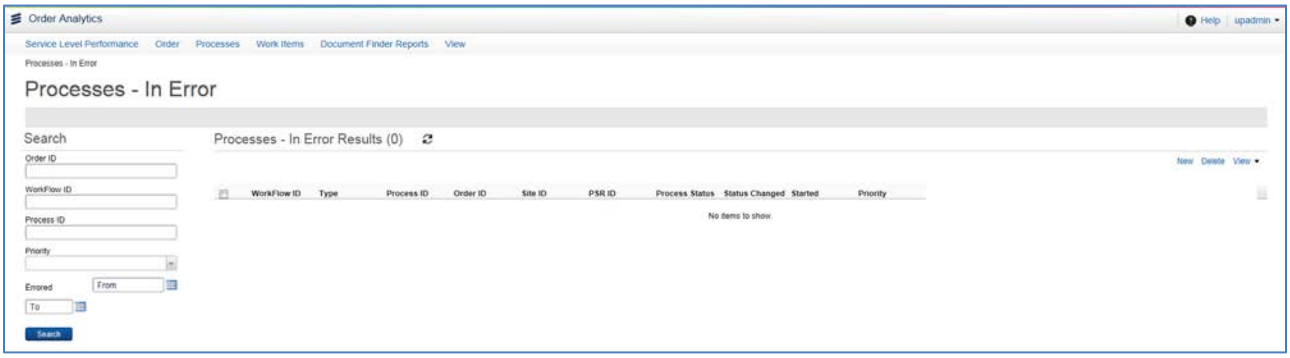



*Figure 37 Processes-In-Error*

Selection Criteria:

You must specify a Period during which processes are in error. You may filter by a specific Order ID, WorkFlow ID, Process ID and Priority.

### 5.3.4 Workflow Status Summary - Current

This report summarizes processes started in a specific period and shows the process statuses and quantities and can be accessed as follows from the menu options:**Processes** > **Summary (Current)**

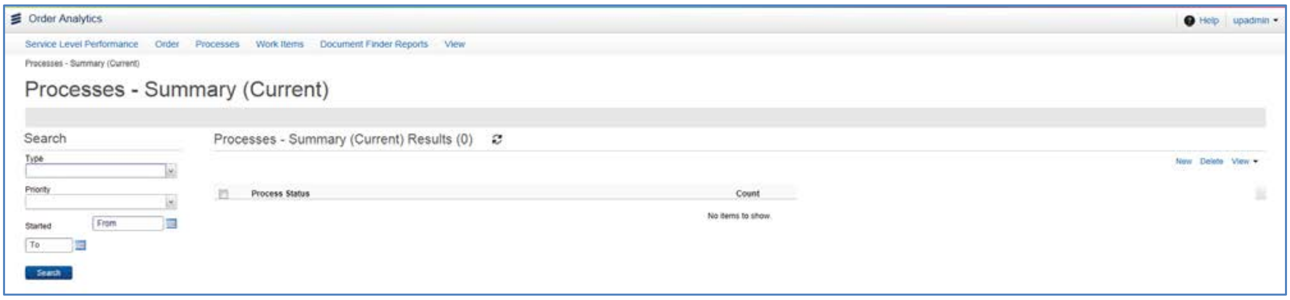



*Figure 38 Workflow Status Summary - Current*

Selection Criteria:

You must specify a Period during which workflow processes were started. You may filter by a specific Type, and Priority.

### 5.3.5 Process Status Summary

This report summarizes all current processes: the quantity of processes (excluding completed), current task name and status (Active, Suspended, in Error) and can be accessed as follows from the menu options:**Processes** > **Process Status Summary**


*Figure 39 Process Status Summary*

Selection Criteria:

You must specify a Period during which processes were started. You may filter by a specific Type, and Priority.

## 5.4 Work Items Reports

### 5.4.1 Work Items - Created

This report displays work list tasks created in a specific period and can be accessed as follows from the menu options: **Work Items**> **Created**

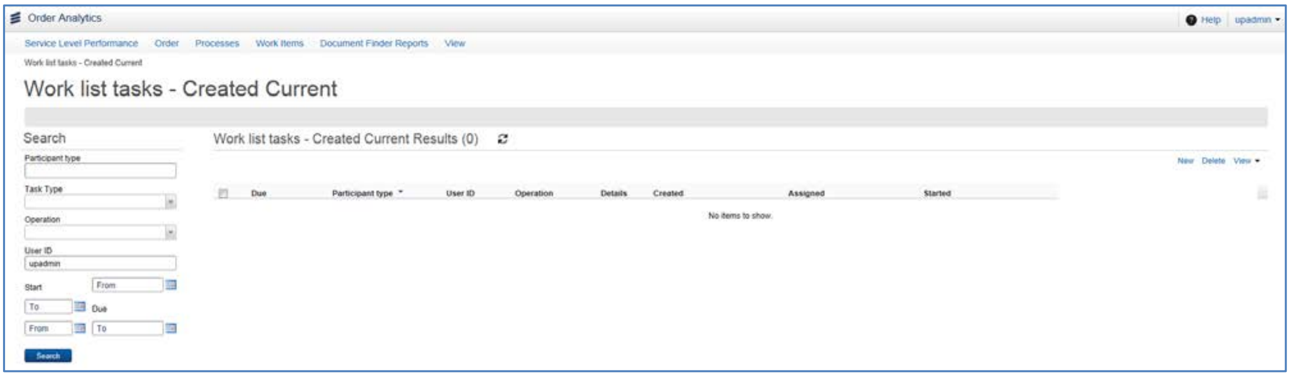



*Figure 40 Work Items Created*

Selection Criteria:

You must specify a period during which work items were created. You may filter by a specific Due Date Period, Participant Type, Task Type, Operation and User ID.

### 5.4.2 Work Items - Completed

This report displays work list tasks completed in a specific period and can be accessed as follows from the menu options: **Work Items**> **Completed**

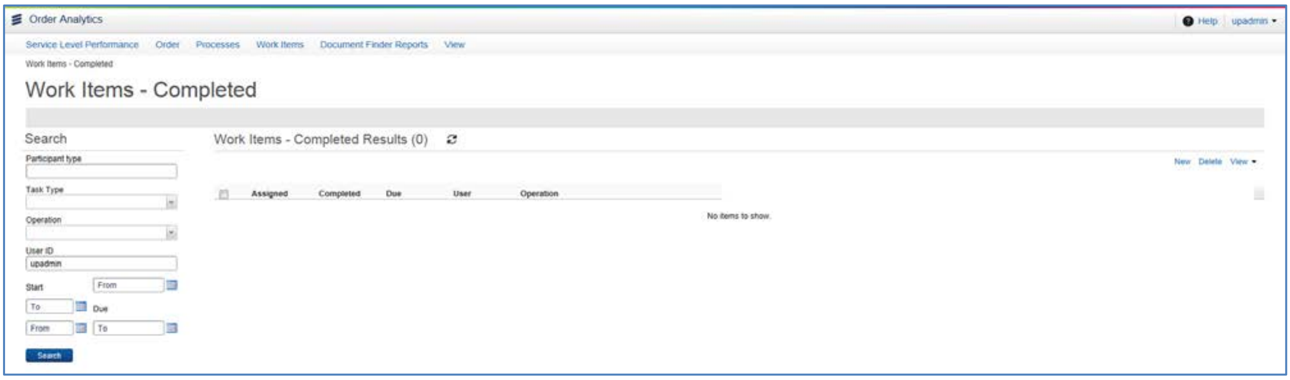



*Figure 41 Work Items Completed*

Selection Criteria:

You must specify a Period during which work items were completed. You may filter by a specific Due Date Period, Participant Type, Task Type, Operation and User ID.

### 5.4.3 Workgroup Summary - Current

This report summarizes all current work tasks for a specified period by Participant Type and can be accessed as follows from the menu options:**Work Items** > **Workgroup Summary – Current**

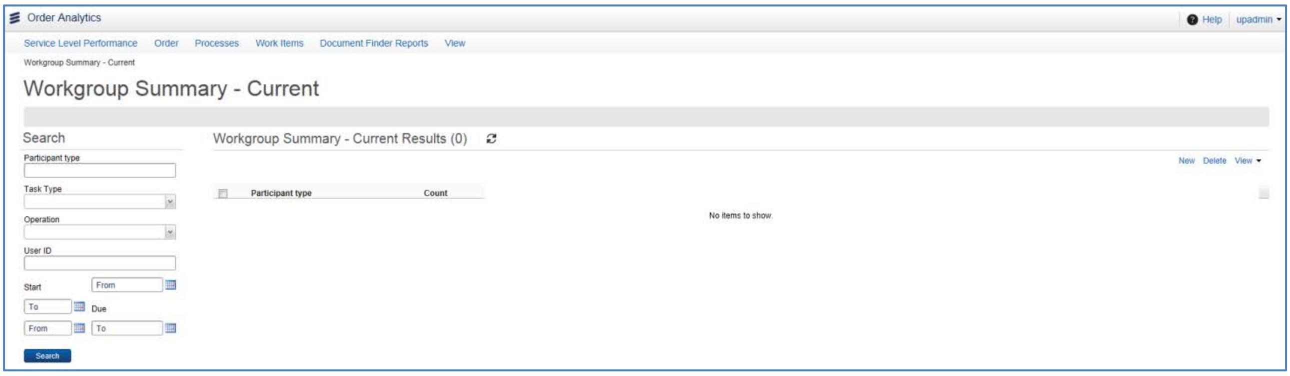



*Figure 42 Workgroup Summary Current*

Selection Criteria:

You may filter by a specific Start Date Period, Due Date Period, Participant Type, Task Type, Operation and User ID.

### 5.4.4 Workgroup Task Summary-Current

This report displays all work lists items for a specified period and by Interface Operation and can be accessed as follows from the menu options:**Work Items** > **Workgroup Task Summary – Current**

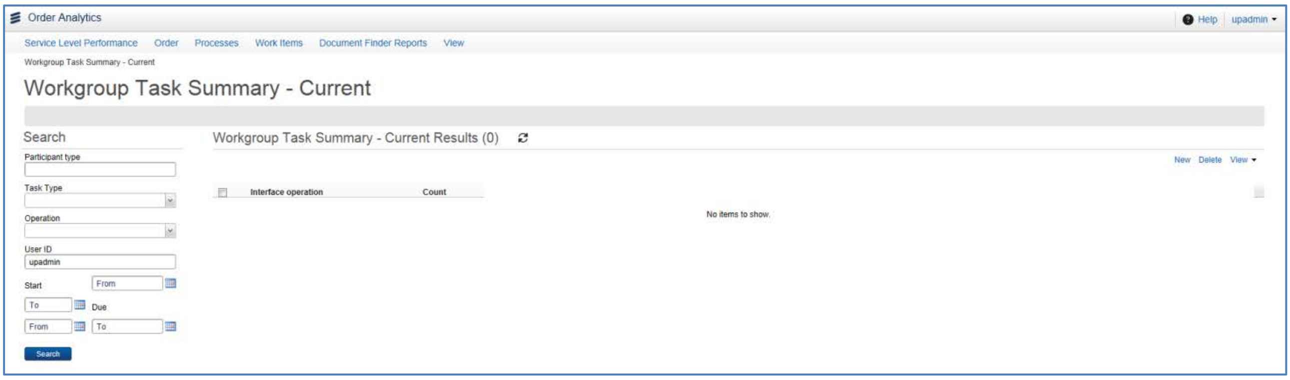



*Figure 43 Workgroup Task Summary-Current*

Selection Criteria:

You may filter by a specific Start Date Period, Due Date Period, Participant Type, Task Type, Operation and User ID.

### 5.4.5 Workgroup Summary - Performance by Month

This report displays all work items by month, for the last 12 months, and by Participant Type and can be accessed as follows from the menu options:**Work Items**> **Workgroup Summary – Performance by Month**

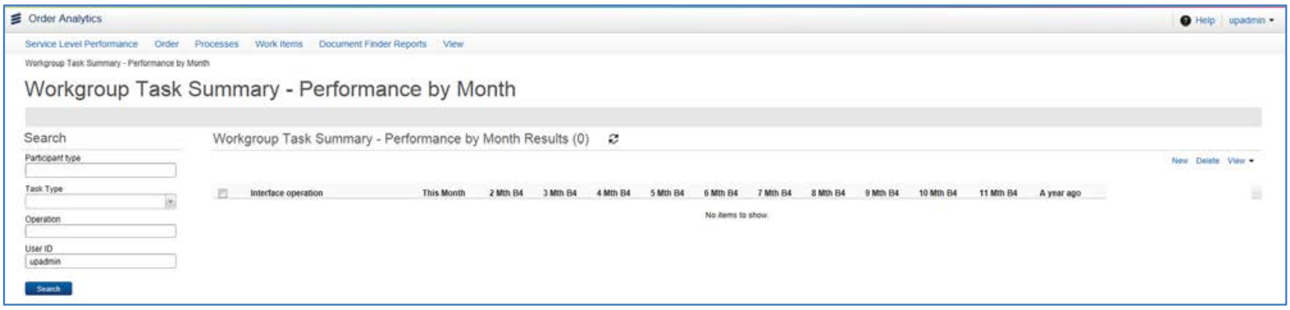



*Figure 44 Workgroup Summary-Performance by Month*

Selection Criteria:

You may filter by a specific Participant Type, Task Type, Operation and User ID.

## 5.4.6 Workgroup Task Summary - Performance by Month

This report displays all tasks by month, for the last 12 month, and by Interface Operation and can be accessed as follows from the menu options:**Work Items** > **Workgroup Task Summary – Performance by Month**

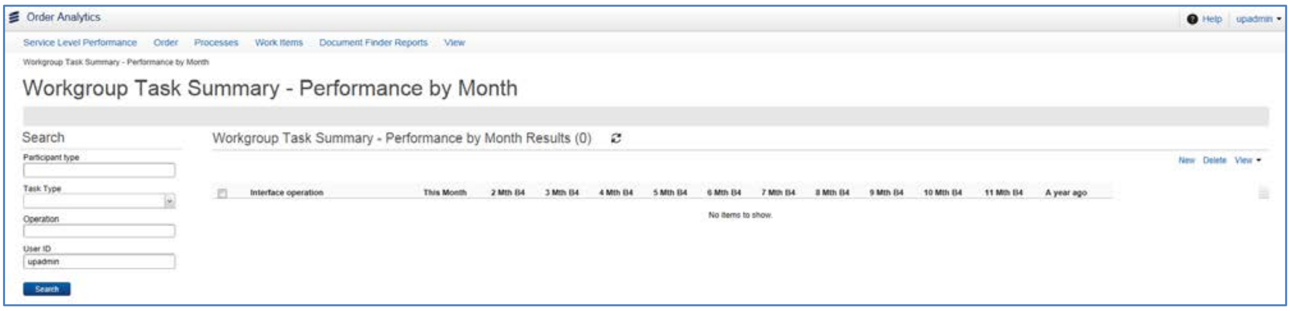



*Figure 45 Workgroup Task Summary - Performance by Month*

Selection Criteria:

You may filter by a specific Participant Type, Task Type, Operation and User ID

## 5.4.7 Work Item Summary by Workgroup

This report summarizes all work items by workgroup by indicating the number of Alerts, Assigned Overdue, Assigned On Time, Unassigned Overdue, Unassigned On Time and Held Work items and can be accessed as follows from the menu options:**Work Items** > **Work Item Summary by Workgroup**

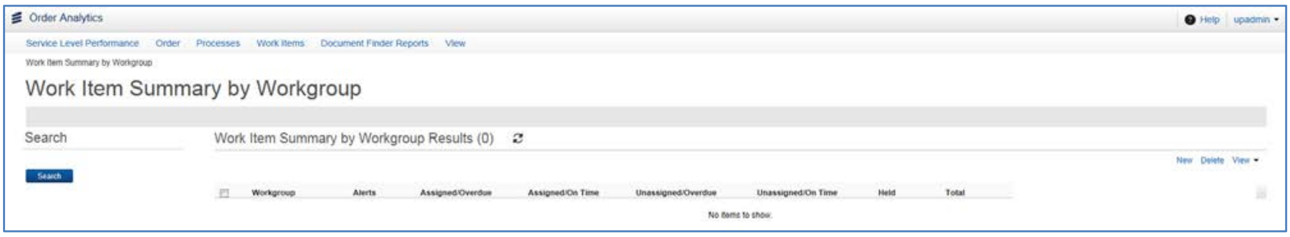


*Figure 46 Work Item Summary by Workgroup*

### 5.4.8 Task Work Item Summary by Workgroup

This report summarizes all work items by workgroup and Operation by indicating the number of Alerts, Assigned Overdue, Assigned On Time, Unassigned Overdue, Unassigned On Time and Held Work items and can be accessed as follows from the menu options: **Work Items**> **Task Work Item Summary by Workgroup**

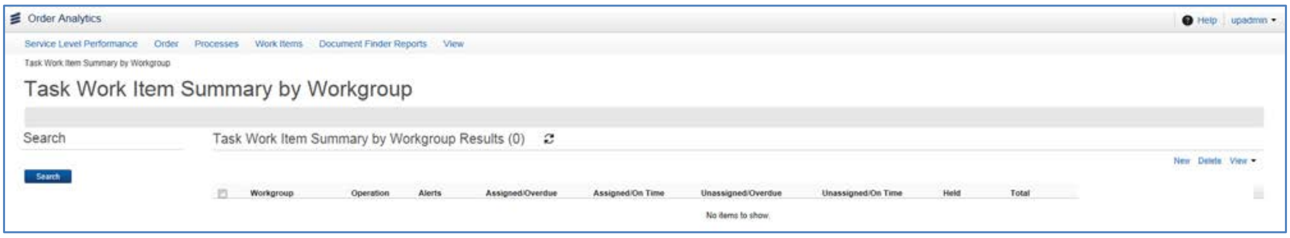



*Figure 47 Task Work Item Summary by Workgroup*

## 5.5 Document Finder Reports

### 5.5.1 Task Finder

This report displays all tasks by taskID, Process, OrderID and other data and can be accessed as follows from the menu options:**Document Finder Report** > **Task Document Finder**

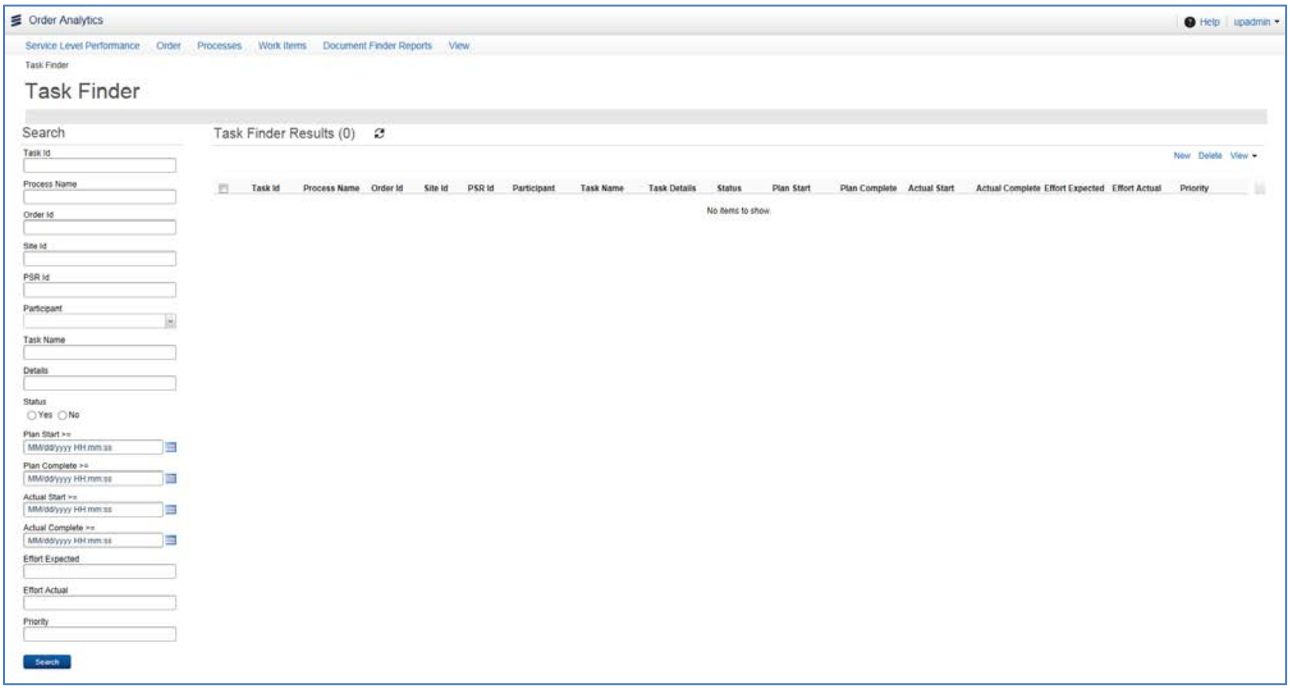



*Figure 48 Task Finder*

### 5.5.2 Site Finder

This report displays site data by Site ID, Order Id, External ID and other information and can be accessed as follows from the menu options: **Document Finder Report** > **Site document finder**

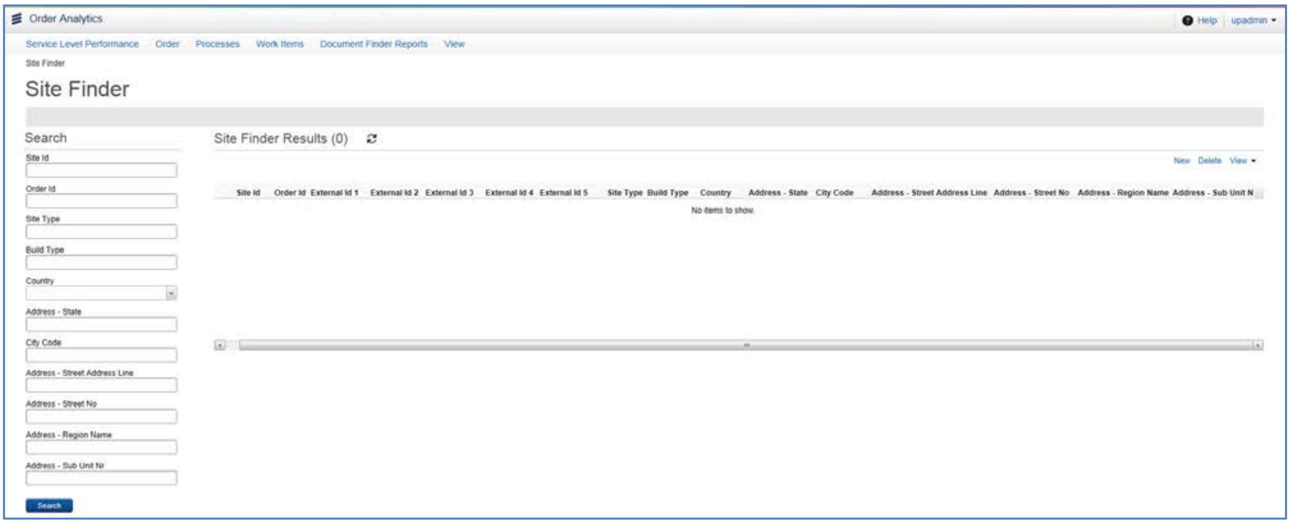



*Figure 49 Site Finder*

### 5.5.3 Party Finder

This report displays party data by Party ID, Order Id, Site ID, PSR ID, Party Role Type, Party Name and Market Segment and can be accessed as follows from the menu options:**Document Finder Report**> **Party document finder**

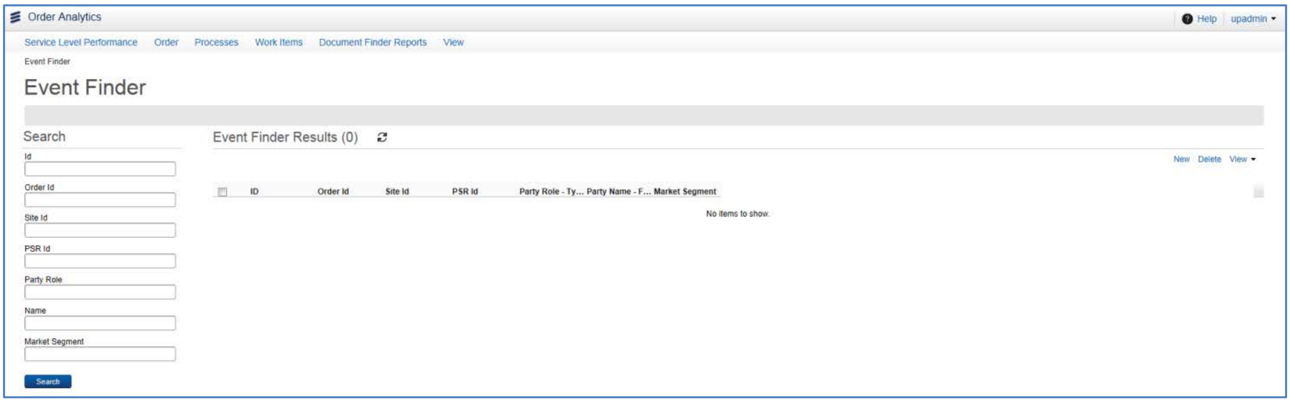



*Figure 50 Party Finder*

### 5.5.4 Business event Finder

This report displays party data by Party ID, Order Id, Site ID, PSR ID, Party Role Type, Party Name and Market Segment and can be accessed as follows from the menu options:**Document Finder Report**> **Business event document finder**

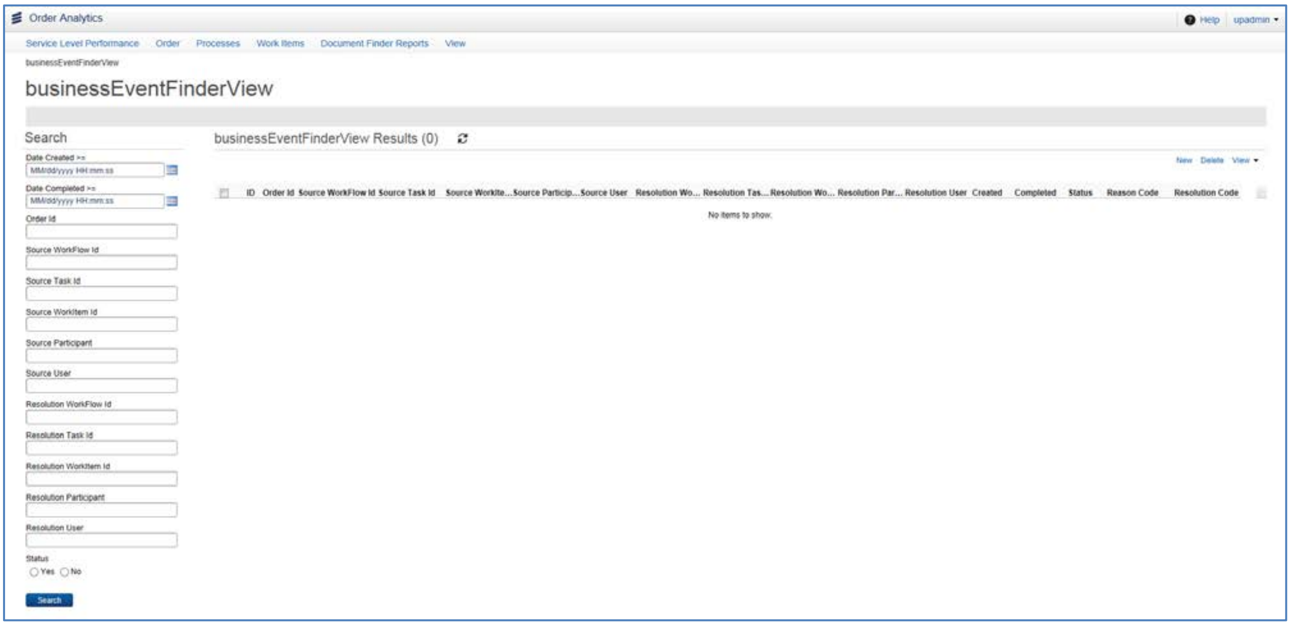



*Figure 51 Business event finder*

## 5.5.5 Workflow Finder

This report displays Workflow Document data by Workflow ID, Process ID, Order ID, Site ID, PSR IID, Process Status, Status Changed, Started, Completed and Priority and can be accessed as follows from the menu options:**Document Finder Report** > **Workflow document finder**

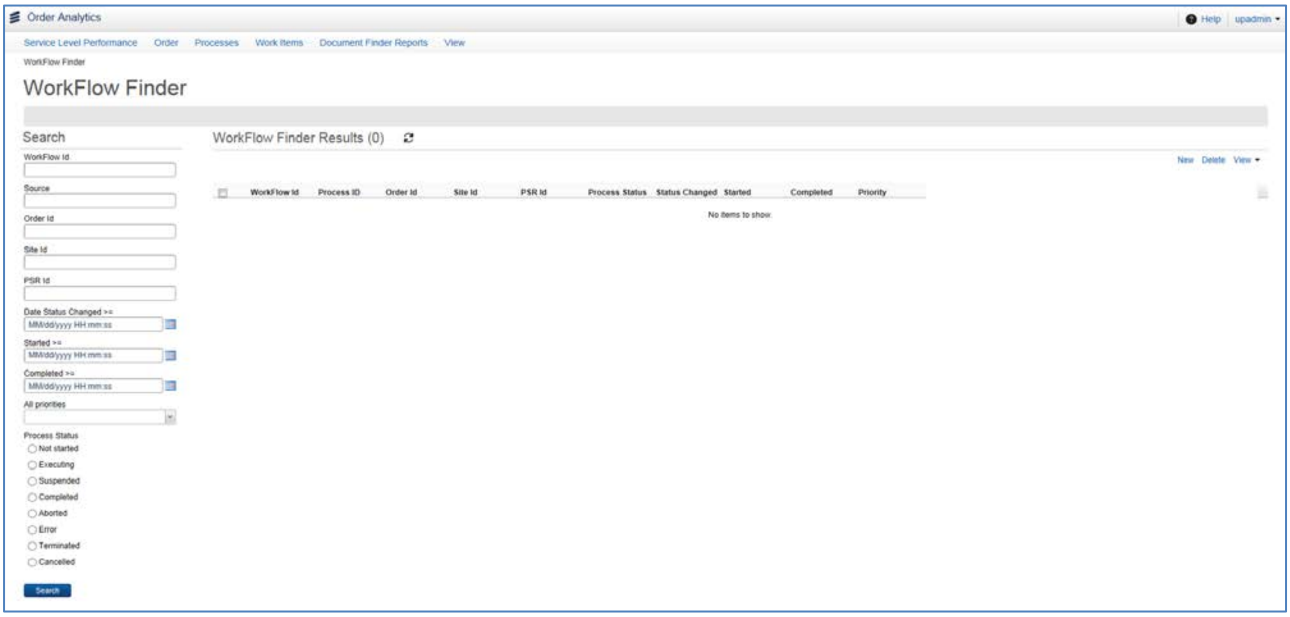



*Figure 52 Workflow Finder*

### 5.5.6 WorkItem Finder

This report displays Work Item  data by Workflow ID, Order ID, Site ID, PSR IID, WorkFlow ID, Task ID, Participant, Operation, Work Details, User ID, Status, Created, Assigned, Started, Completed and Priority and can be accessed as follows from the menu options: **Document Finder Report**> **Work Item document finder**

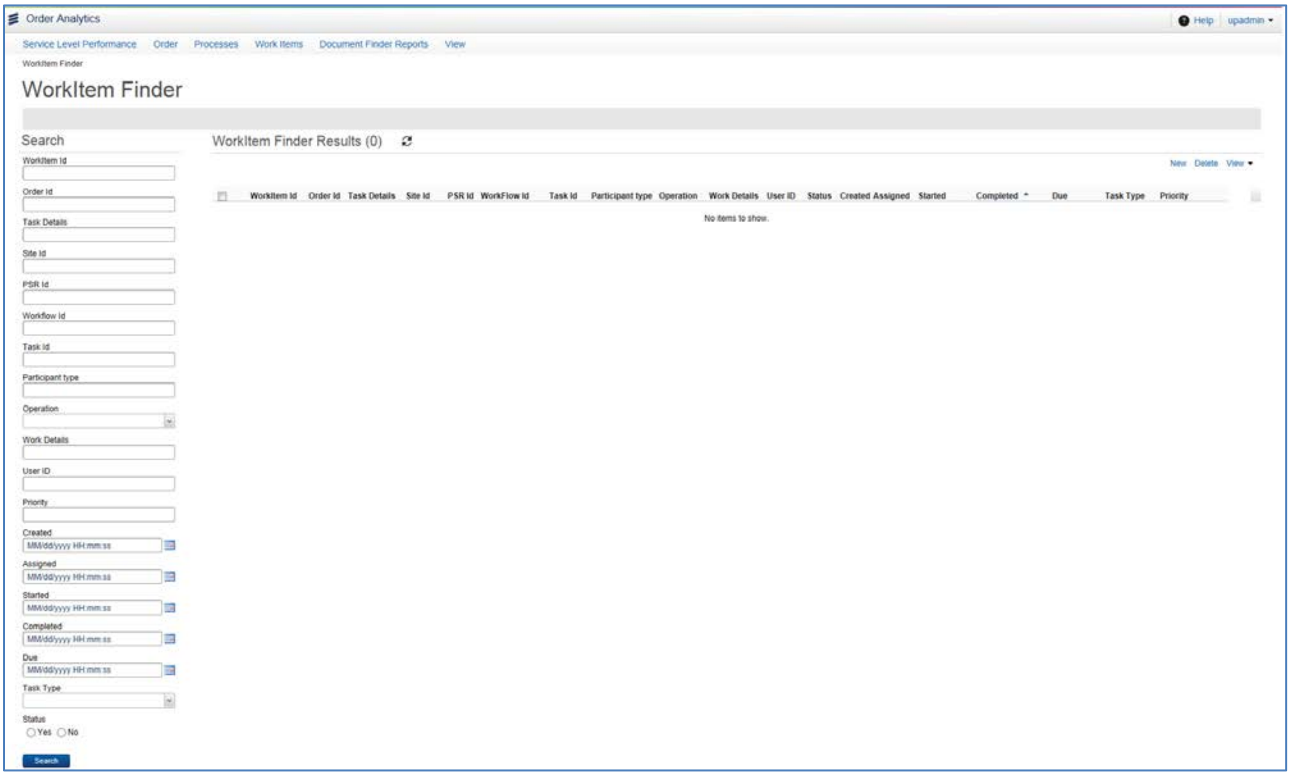



*Figure 53 Work Item Finder*

## 5.6 View

### 5.6.1 Event Log

This report displays all system messages and can be accessed as follows from the menu options: **View** > **Event Log**

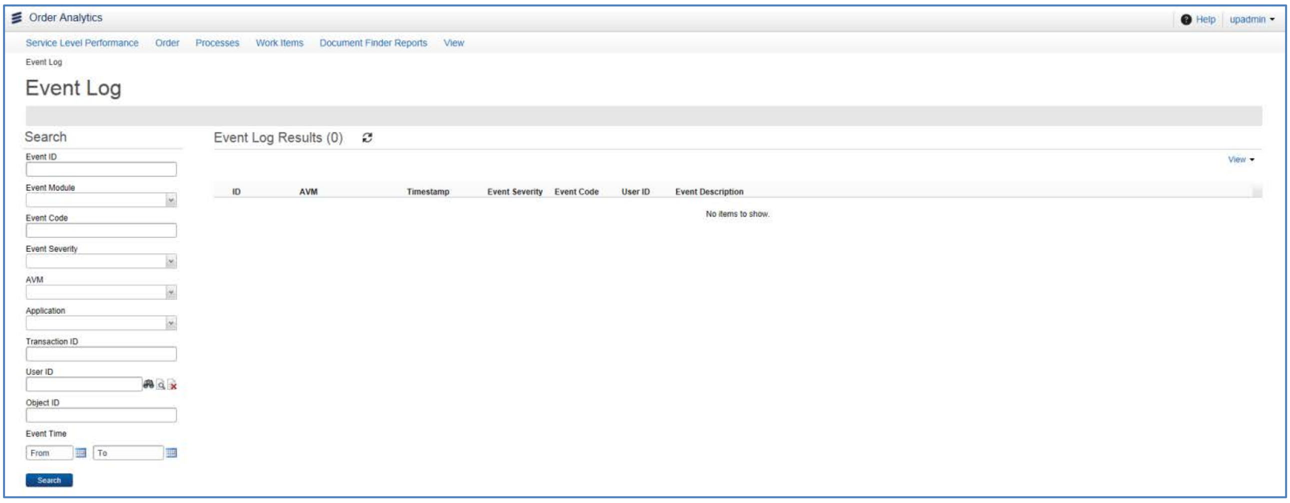



*Figure 54 Event log*

# 6 Appendix: Reports Terminology: Common Terms

The following terms may occur in any Report Search Filter Form:

| Terminology | Definition |
|---|---|
| **Process** | The 'running' entity which orchestrates tasks and operations in sequence or in parallel |
| **Process State/Status** | The state of the Process (for example, Executing, In Error, Suspended, Terminated, Cancelled, and so on.) |
| **Process Priority** | Describes if the Process has been flagged as Regular, High or Low priority |
| **Process Activity** | The granular components of a Process (switch, case sequence etc.) which guide the direction of the process |
| **Operation** | A specific type of Process Activity which requires interaction with an Interface<br><br>Operations  are either Synchronous or Asynchronous |
| **Milestone** | The 'Expected Completion Time' for a Process Activity, or a Sequence of Process Activities |
| **Participant** | Describes the External System or Workgroup that performs an Interfaces Operations<br><br>If it is a Workgroup, the Participant correlates Privileges to an Interfaces Operations. |
| **WorkGroup** | Entity defining a group of Users assigned a fixed set of Application Privileges |
| **WorkItem** | A Unit of work (Task), assigned to be done by a User or by an External System |
| **Tasktype** | Describes whether the task is an Initial (regular) task, has been Re-issued, or is an Alert |
| **Alert** | A specific Task Type which notifies a User or System of some event in the Process.  The Alert may take the form of a Task which requires Acknowledgement by a User; it may also be an Email or SMS message which (require no |

| Terminology | Definition |
|---|---|
| | acknowledgement) |
| **Assigned/Unassigned** | Describes if a Task has been Assigned to a User, or not |

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