Ericsson Order Care

Realize Higher Consistency for Faster Time-to-Revenue

Orchestration Framework User Guide

4/1553 - CSH 109 420/1 Uen Rev A

© Ericsson AB 2014
All rights reserved. The information in this document is the property of Ericsson. Except as specifically authorized in writing by Ericsson, the receiver of this document shall keep the information contained herein confidential and shall protect the same in whole or in part from disclosure and dissemination to third parties. Disclosure and disseminations to the receiver's employees shall only be made on a strict need to know basis.

Contents

© Ericsson AB 2014
Commercial in confidence

© Ericsson AB 2014
Commercial in confidence

1 Introduction

1.1 Purpose and Scope

The purpose of this guide is to introduce you to some basic Orchestration Framework (OF) concepts and helps you to become familiar with the system. This guide describes how to access OF through a computer and a Web browser.

Readers are not required to have any programming or software development knowledge, but should be comfortable with using a computer and a Web browser such as Microsoft Internet Explorer or Mozilla Firefox.

1.2 Overview

OF is a module within the Order Management (OM) accelerator. OM allows you to dynamically orchestrate and assemble processes in runtime. The framework contains functionality to define and create microflows, Technical Action Specifications (TAS), and fulfillment plans through its own UI. This product is flexible that allows non-technical users to configure process flows from a defined set of microflows that results in less time to market.

2 Getting started

2.1 Before You Begin

Configure the OF application as per the OF Configuration Guide. OF is a Web-based application that requires one of the following browsers. It will 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

2.2 Access the OF Application

To access the OF application, complete the following steps:

1. Open a Web browser and enter the http://<localhost>:<port>/cwf/login Web address in a Web browser. For example, http://localhost:8080/cwf/login.

© Ericsson AB 2014
Commercial in confidence

Figure 1 Login Screen

2 Enter the username and password to log in (for example, upadmin in both the **Username** and **Password** fields) and then click the **OK** button.

3 The **Select Application** dialog appears. Select the **Orchestration Framework** and then click the **Select** button to access the application.

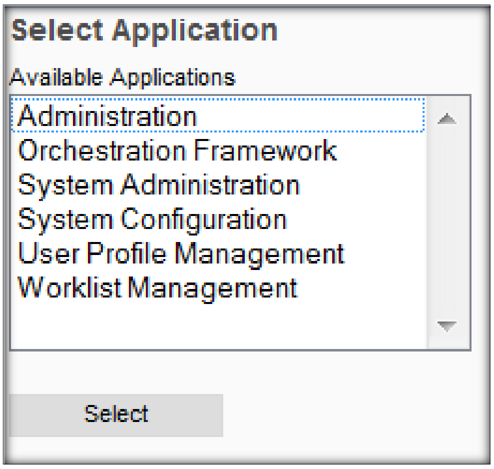


Figure 2 Select Application Dialog

4 The home page OF application appears as follows:

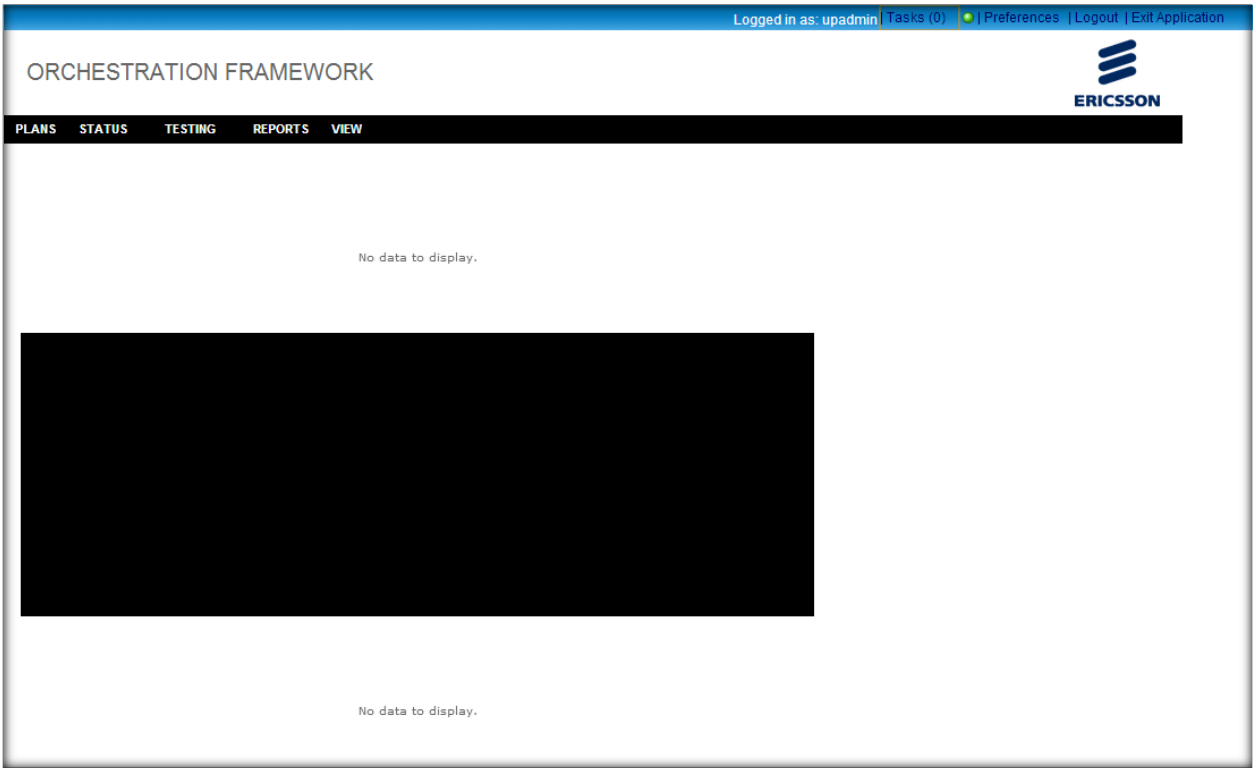


Figure 3 Home Screen of Orchestration Framework

If the login screen does not load, verify that either the Web address is correct or contact your system administrator to verify that you have the correct Web address.

2.3 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's Web address 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.

© Ericsson AB 2014
Commercial in confidence

3 Orchestration Framework's user interface

The Orchestration Framework's user interface contains the following elements:

- Preferences and logout bar
- Main area
- Menu bar

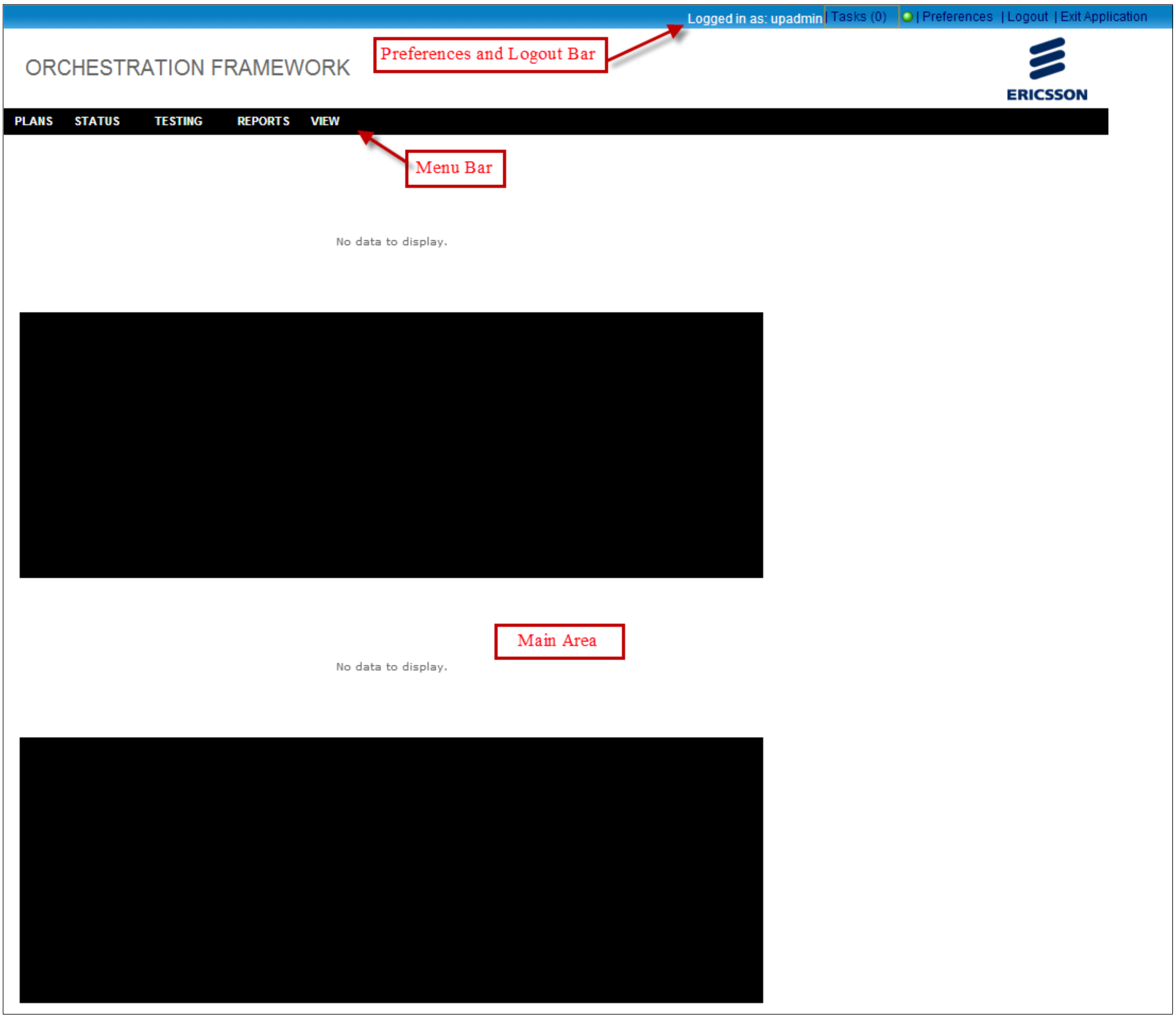


Figure 4 Orchestration Framework's User Interface

3.1 Preferences and Logout Bar

This section contains the following components:

- Indication of the user who has logged in to the OF application
- Number of assigned tasks and user availability for task assignment

© Ericsson AB 2014
Commercial in confidence

- Application preferences
- Log out of the application
- Exit the application and return to the Select Application page

3.1.1 Indication of Logged-in User

The top right corner of the user interface shows who has logged in to the application. In this example, upadmin is logged in.

3.1.2 Number of Assigned Tasks and User Availability for Task Assignment

The top right corner of the user interface shows the number of tasks (**Tasks (***number***)**) currently assigned to the logged-in user. It also shows whether the current user is available for task assignment.

In this example, the upadmin user has no tasks assigned. The green circle indicates that this user is available for task assignment.

For the (**Tasks (***number***)**), if the logged-in user does not have the proper privilege to work with any participant in your metadata project (that is, no tasks can be assigned to this user), the number of tasks does not appear. Clicking the **Tasks (***number***)** opens the My Tasks page.

Next to the **Tasks (***number***)** is the user availability icon, which shows whether the current user is available for task assignment. By default, this icon is a green ball, indicating that the user is available. Otherwise, this icon is grey, meaning that the user is unavailable. You can click the user availability icon to toggle states. A popup dialog appears, prompting you to confirm whether to change this state from available to unavailable, or vice-versa. Click the **Yes** button to confirm. If the user does not have this privilege, clicking this icon results in no action being performed.

3.1.3 Application Preferences

From Preferences hyperlink, you can hide the banner and change the number of default rows per page.

© Ericsson AB 2014
Commercial in confidence

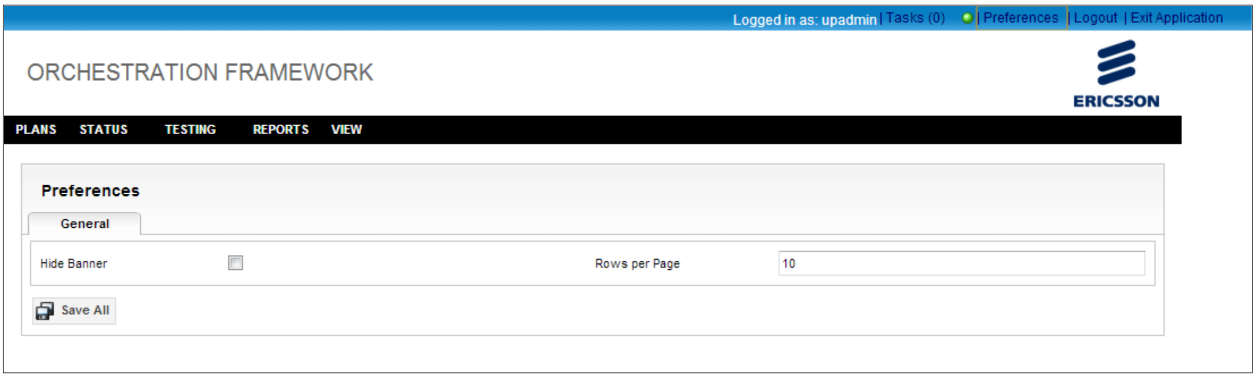


Figure 5 Preference Settings

3.1.3.1 Hide the Banner

To hide the banner, complete these steps:

1. Click the **Preferences** hyperlink to launch the Preferences page.
2. Select the **Hide Banner** setting and then click the **Save All** button.
3. The banner disappears and a confirmation appears, indicating that your preference settings have been successfully saved.

3.1.3.2 Change the Rows per Page

To change the rows per page, complete these steps:

1. Click the **Preferences** hyperlink to launch the Preferences page.
2. Enter the number of rows in the **Rows per Page** field. This setting defaults to ten rows.
3. Click the **Save All** button. A confirmation appears, indicating that your preference setting has been successfully saved.

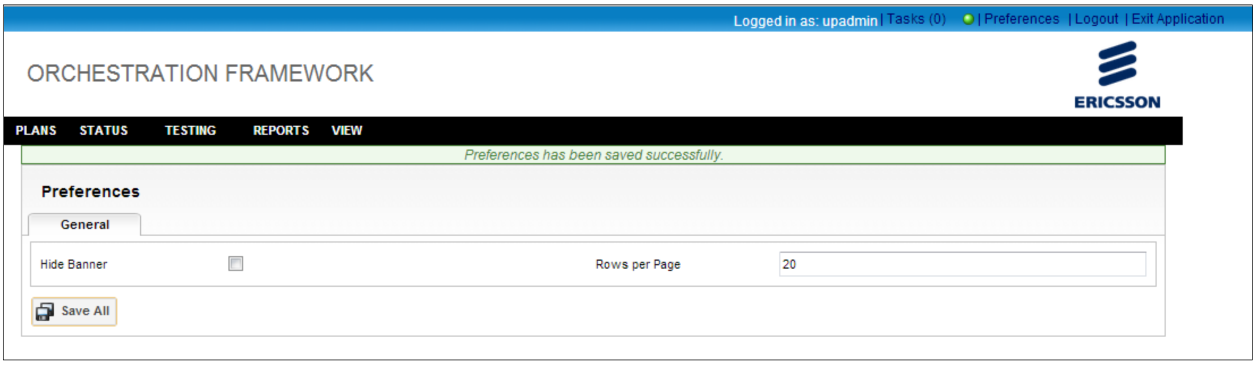


Figure 6 OF application's Preferences

3.1.4 Logout

Click the **Logout** hyperlink to end your current session.

© Ericsson AB 2014
Commercial in confidence

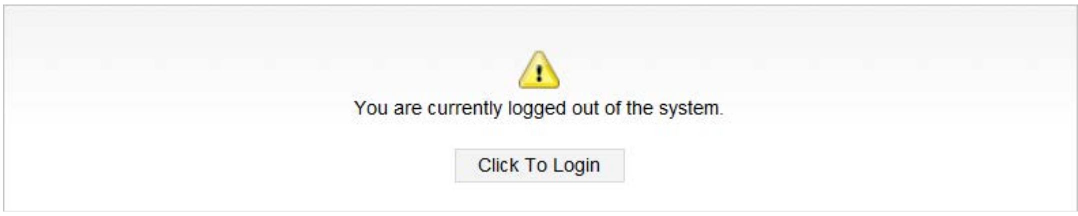


Figure 7 Logout from OF Application

To log back in, click the **Click to Login** or **Login** button, depending on whether you are using the classic or tiled version of the Select Application page.

3.1.5 Exit Application

Click the **Exit Application** hyperlink to close the application and return to the Select Application page.

3.2 Main Area

The main area appears under the menu bar, which contains information pertaining to the page that you are on. For example, the Event Log allows you to specify search criteria. Both the search criteria and your search results appear in the main area of the page.

3.3 Menu Bar

The menu bar contains the following options:

- Plans
- Status
- Testing
- Reports
- View

The following section of the document explains these menus in detail.

4 Plans

The Plans menu allows you to define and configure Microflows, Technical Action Specification (TAS), Fulfillment Plans, and more. This menu contains the following options:

- Customer Facing Services
- Subscriber States
- Microflows
- Technical Action Specifications
- TAS SLAs
- Fulfillment Plans

© Ericsson AB 2014
Commercial in confidence

- Find Subscriber Transition Strategy

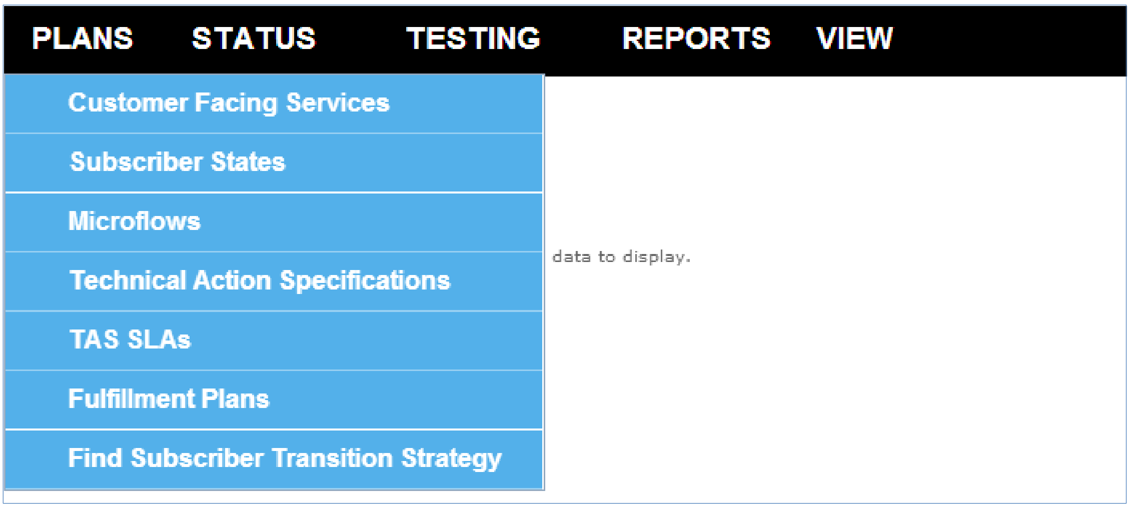


Figure 8 Plans Menu

4.1 Customer Facing Services

A **customer facing service** (CFS) is a service subscribed to by a subscriber. Click **Plans** > **Customer-Facing Services,** which allows you to perform the following actions:

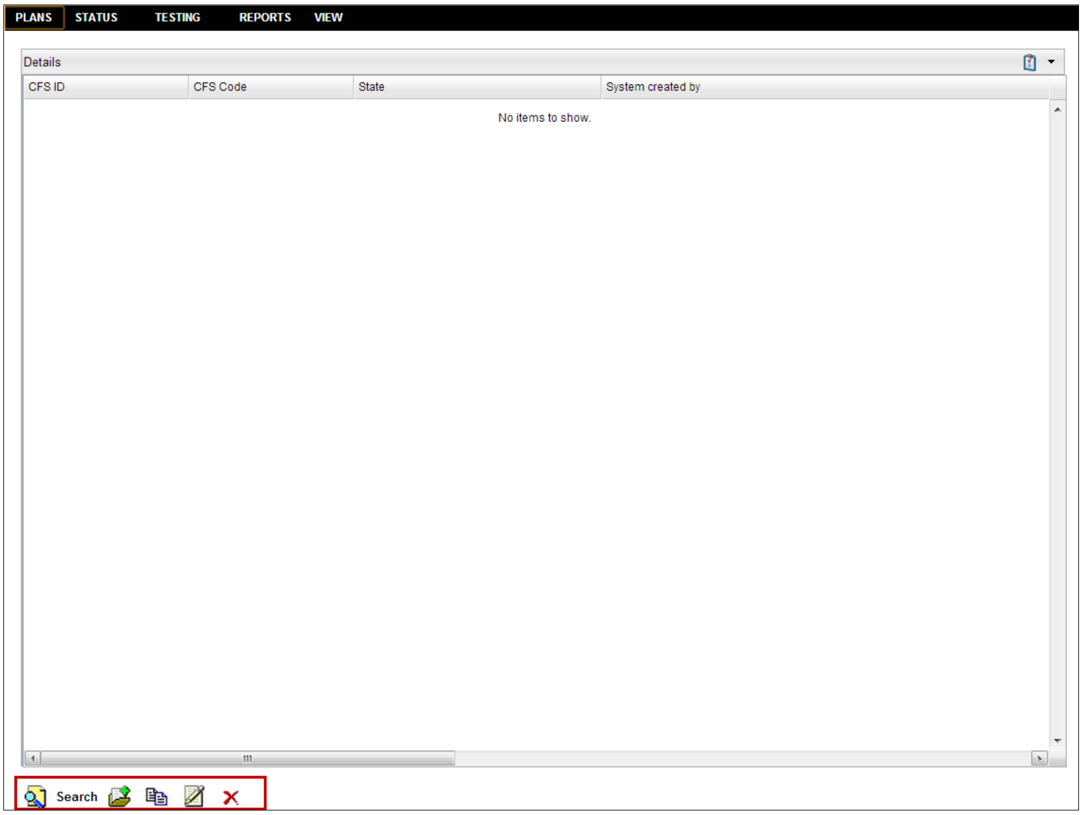


Figure 9 Customer Facing Services Page

© Ericsson AB 2014
Commercial in confidence

- **Search** button: Display customer facing service details
- **Add** button: Add a new customer facing service
- **Copy** button: Make a copy of an existing customer facing service
- **Edit** button: Change and update an existing customer facing service
- **Delete** button: Delete an existing customer facing service

4.1.1 Search a CSF

To search a CFS, click the **Search** button ( ) from Customer Facing Services page. A list of available CFSs appears as follows:

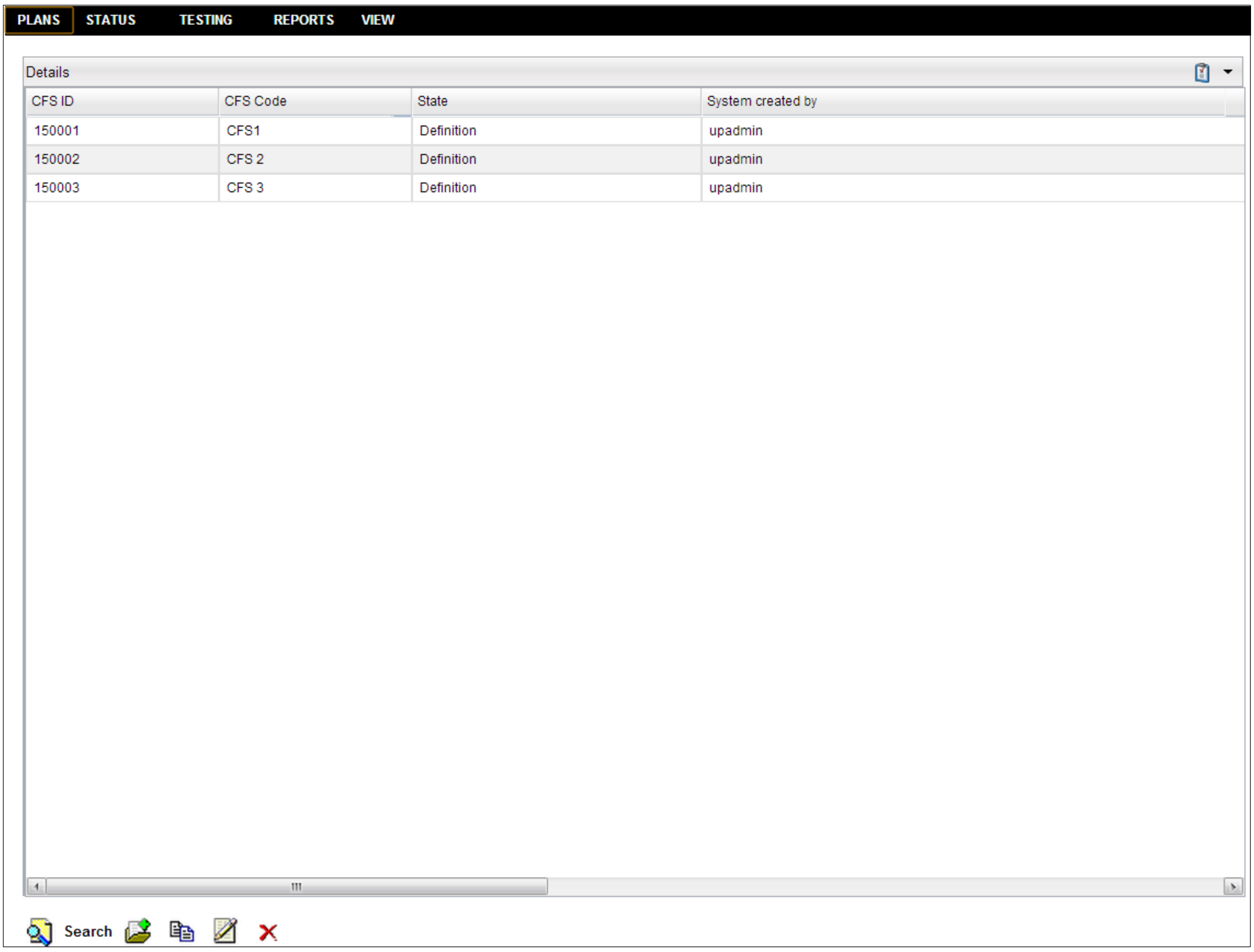


Figure 10 Customer Facing Services - Search results

You can download the search results in different file formats. Click the **Preferences** button ( ) and select one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

© Ericsson AB 2014
Commercial in confidence

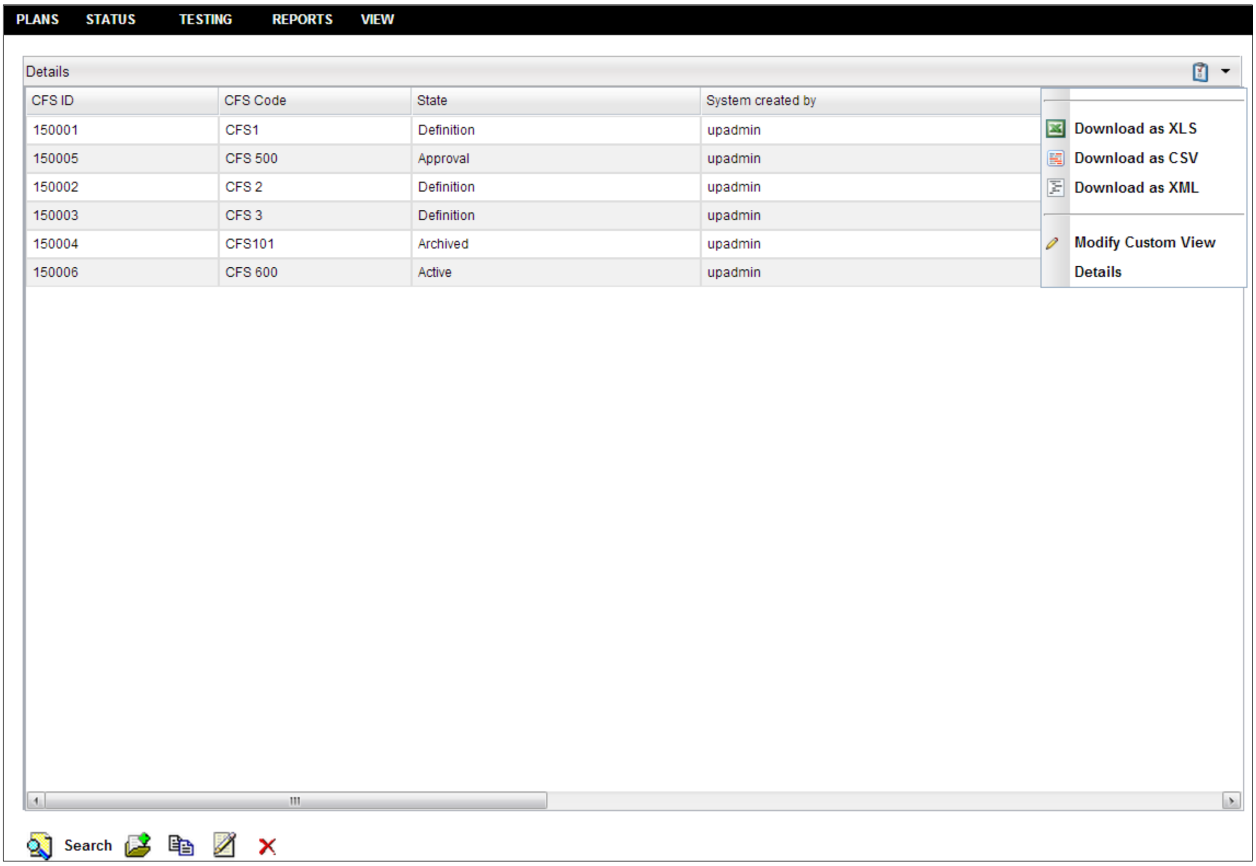


Figure 11 Download options for search results

4.1.2 Add or Create a new CFS

To add a new CFS, do the following:

1. From the Customer Facing Service search page, click the **Add** button ().
2. The Customer Facing Services page appears. Enter the information in **CFS Code** field (for example, CFS102).
3. Select one of the following states from drop-down list of **State** field.
   - Definition
   - Approval
   - Active
   - Archived

© Ericsson AB 2014
Commercial in confidence

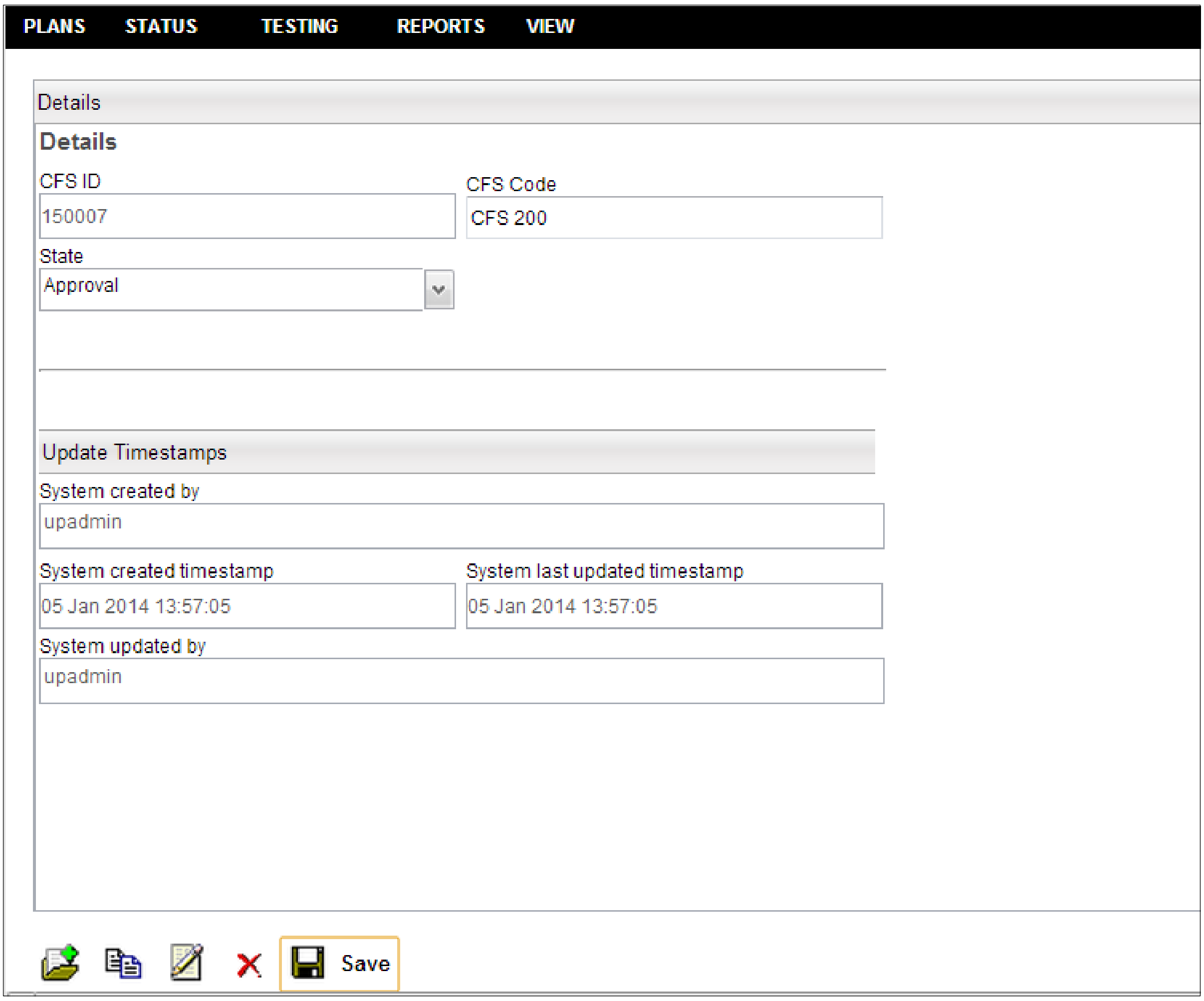


Figure 12 Add a new CFS

4 Click the **Save** button () to save your changes and create your CFS.

5 The value or information for the rest of the fields is generated by the System.

6 Click the back button () to go back to the search page.

The following table explains the fields:

Field	Description	System generated
CFS ID	This field denoted the ID of the CFSs.	Yes
CFS Code	This field indicates the code for CFSs, defined by you (user).	No
State	This filed has a drop down list of states. Select one of these states:	No

© Ericsson AB 2014
Commercial in confidence

<table>
<tr><th>Field</th><th>Description</th><th>System generated</th></tr>
<tr><td></td><td>Definition
Approval
Active
Archived</td><td></td></tr>
<tr><td>Update Timestamp</td><td>This section of the page has the following fields:
<table>
<tr><td>System created by</td><td>This field denotes the name of the user who creates the CFSs.</td></tr>
<tr><td>System created timestamp</td><td>This field indicates the date and time when the CFSs was created.</td></tr>
<tr><td>System last updated timestamp</td><td>This field indicates the date and time when the CFSs was updated.</td></tr>
<tr><td>System updated by</td><td>This field denotes the name of the user who updates the CFSs.</td></tr>
</table></td><td>Yes</td></tr>
</table>

4.1.3 Copy CFS

To copy a CFS, do the following:

1. Select a CFS from the result list and click the **Copy** button ( ).
2. The Customer Facing Services page appears with the details of the selected CFS.
3. You can change the **State** and **CFS Code**. Click the **Save** button ( ).
4. Click the back button ( ) to go back to the search page.

4.1.4 Edit CFS

To edit a CFS, do the following:

1. Select a CFS from the result list and click the **Edit** button ( ).

© Ericsson AB 2014
Commercial in confidence

2 The Customer Facing Services page appears with the details of the selected CFS.
3 You can change the **State** and **CFS Code**. Click the **Save** button ().
4 The rest of the fields are updated by the system.
5 Click the back button () to go back to the search page.

4.1.5 Delete CFS

To delete a CFS, do the following:

1 Select a CFS from the result list and click the **Delete** button ().
2 A confirmation dialog appears; click the **Yes** button to delete the selected CFS.

4.2 Subscriber States

The **Subscriber State** (SUS) defines the current or desired set of customer facing services held by the subscriber. Click **Plans** > **Subscriber States**, which allows you to perform the following actions:

© Ericsson AB 2014
Commercial in confidence

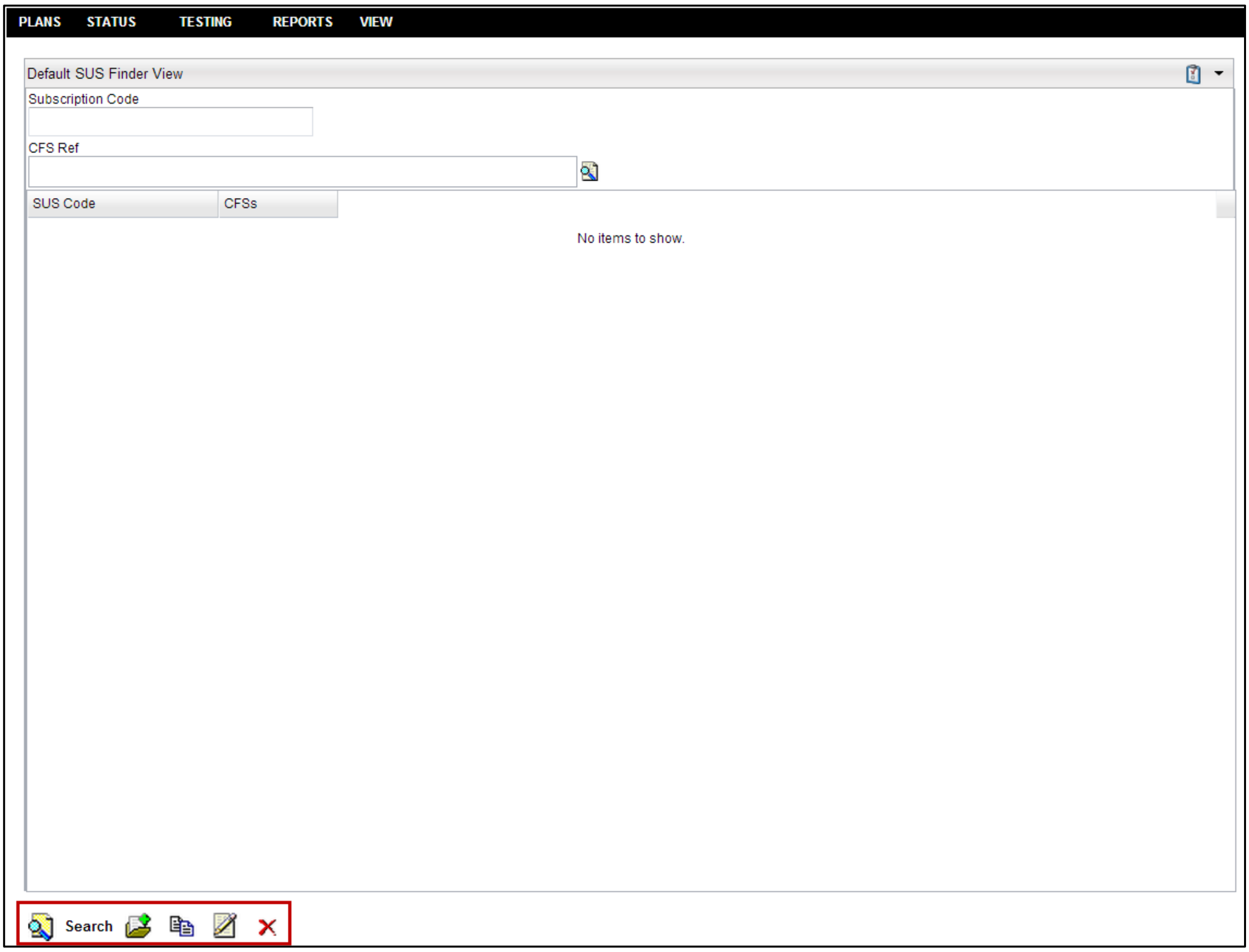


Figure 13 Subscriber States actions

- **Search** button: Display subscriber state details
- **Add** button: Add a new subscriber state
- **Copy** button: Make a copy of an existing subscriber state
- **Edit** button: Change and update an existing subscriber state
- **Delete** button: Delete an existing subscriber state

4.2.1 Perform a Subscriber States Search

To search all subscriber states, click the Search button. To searches a specific subscriber state, enter the search criteria in the **Subscription Code** field and then click the **Search** button.

© Ericsson AB 2014
Commercial in confidence

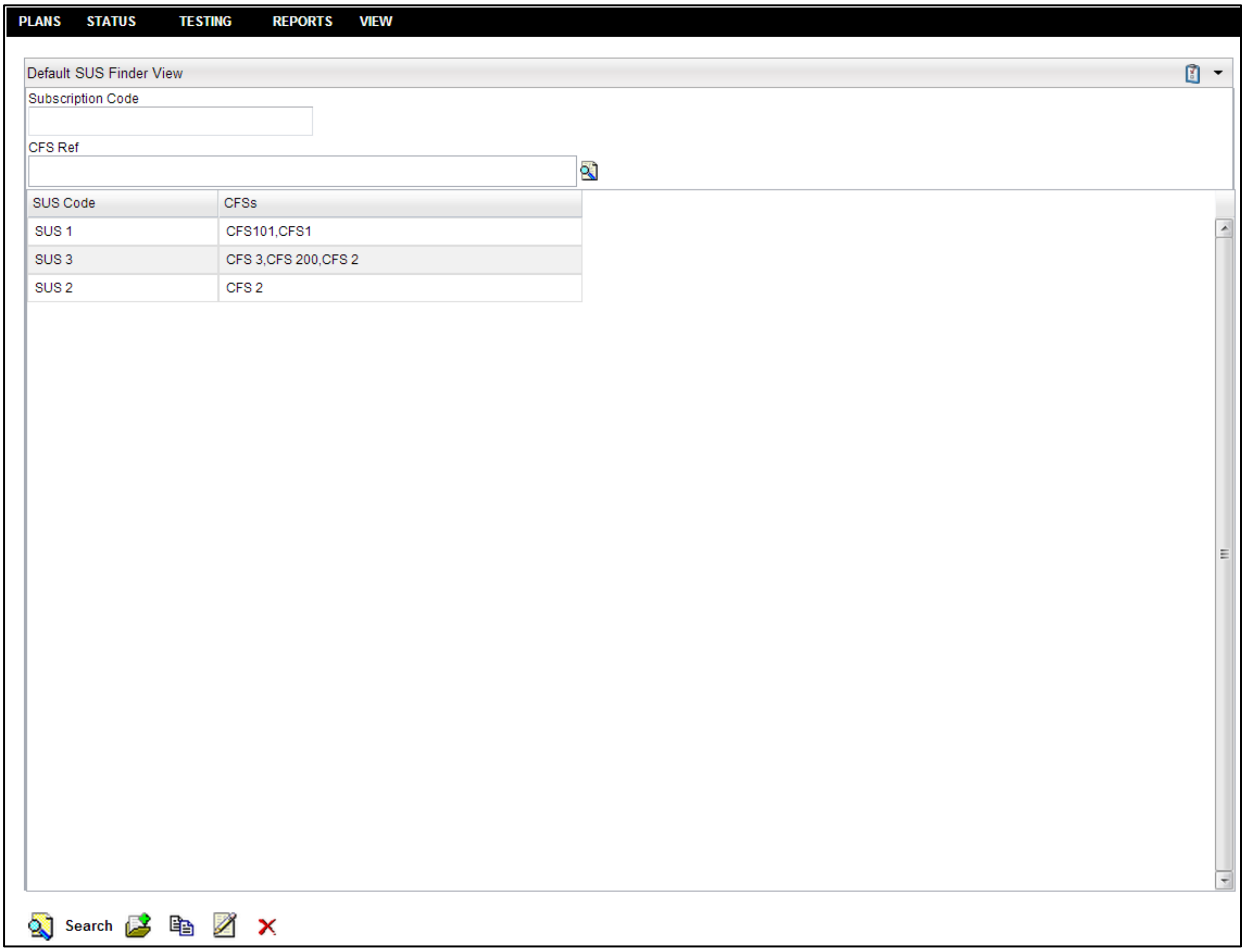


Figure 14 Subscriber States - search results

You can download the results in different file formats. Click the **Preferences** button ( ) and select one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

4.2.2 Add or create a Subscriber States

To add a new Subscriber States, do the following:

1 From the **Subscription Statuses** search page, click the **Add** button ( ).

© Ericsson AB 2014
Commercial in confidence

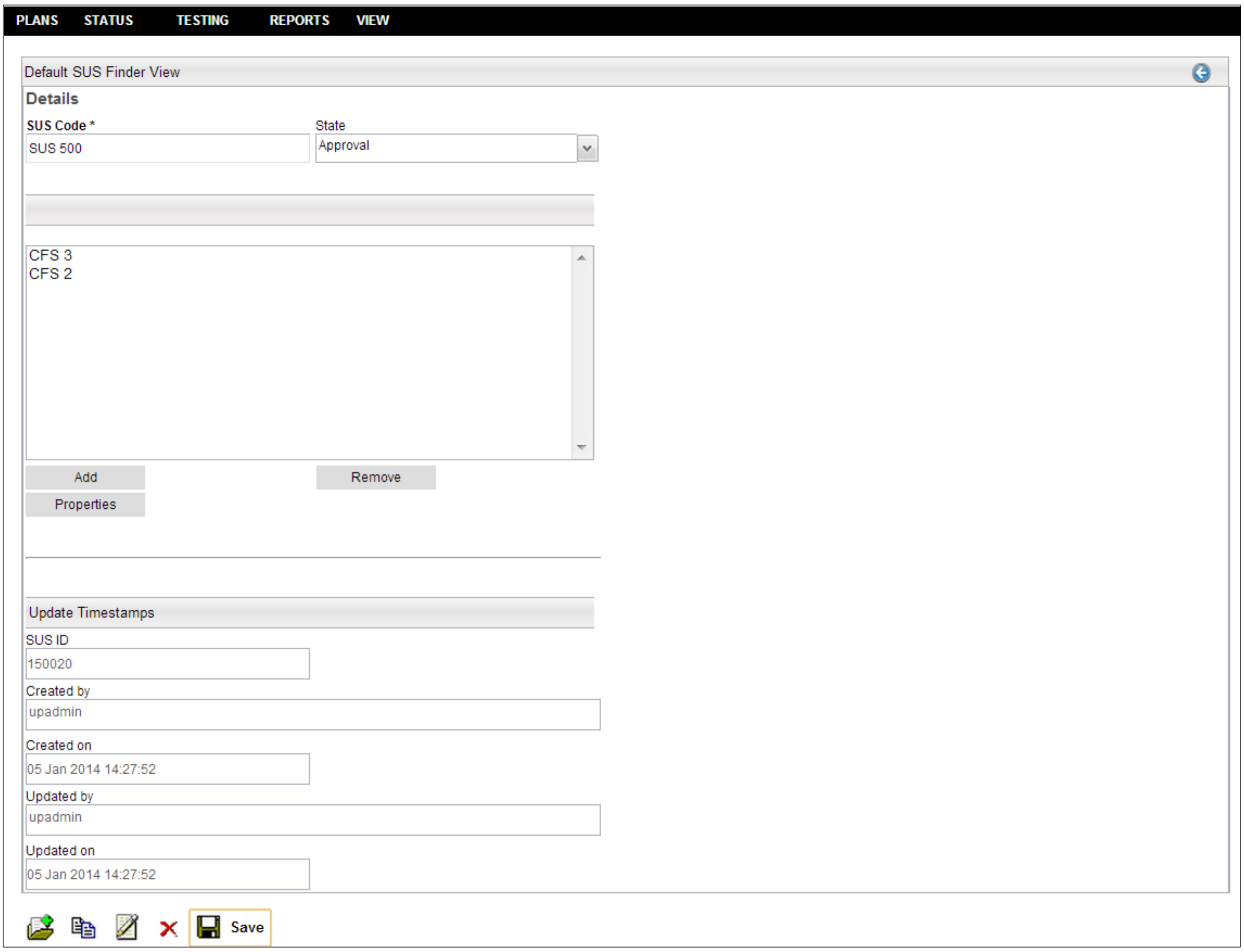


Figure 15 Add a new Subscriber States

2 On the **Subscription Statuses** page, enter value for SUS **Code** field (for example, SUS102).

3 Select a state from drop-down list of **State** field.

- Definition
- Approval
- Active
- Archived

4 Click the **Add** button. The Customer Facing Services page appears. Select one or more available CFSs to link with the Subscriber State and click the **Select** button.

- To view the details of CFSs, select one CFS and click the **Properties** button.
- To remove CFSs, select one and then click the **Remove** button.

5 Click the **Save** button ( ).

6 The value or information for the rest of the fields is generated by the System.

7 Click the back button ( ) to go back to the search page.

© Ericsson AB 2014
Commercial in confidence

4.2.3 Copy Subscriber States

To copy a Subscriber State, do the following:

1. Select a Subscriber State from the result list and click the **Copy** button ( ).
2. The Subscriber States page appears with the details of the selected Subscriber State.
3. You can change the **SUS Code**, **State**, and related **CFS Code**. Click the **Save** button ().
4. The rest of the fields are updated by the system.
5. Click back button () to go back to the search page.

4.2.4 Edit Subscriber States

To edit a Subscriber State, do the following:

1. Select a Subscriber State from the result list and click the **Edit** button ().
2. The Subscriber States page appears with the details of the selected Subscriber States.
3. You can change the **SUS Code**, **State**, and related **CFS Code**. Click the **Save** button ().
4. The rest of the fields are updated by the system.
5. Click back button () to go back to the search page.

4.2.5 Delete Subscriber States

To delete a Subscriber State, do the following:

1. Select a Subscriber State from the result list and click the **Delete** button ( ).
2. A confirmation dialog appears. Click the **Yes** button to delete the selected Subscriber State

4.3 Microflows

A **microflow** is fully modeled workflow within the platform. You model microflows as processes, not as sub-flows. The primary difference is that they can instantiate themselves (without calling a parent), and may define their own parameters, rather than inheriting the calling parent's parameters. Clicking **Plans** > **Microflows** allows you to perform the following actions:

© Ericsson AB 2014
Commercial in confidence

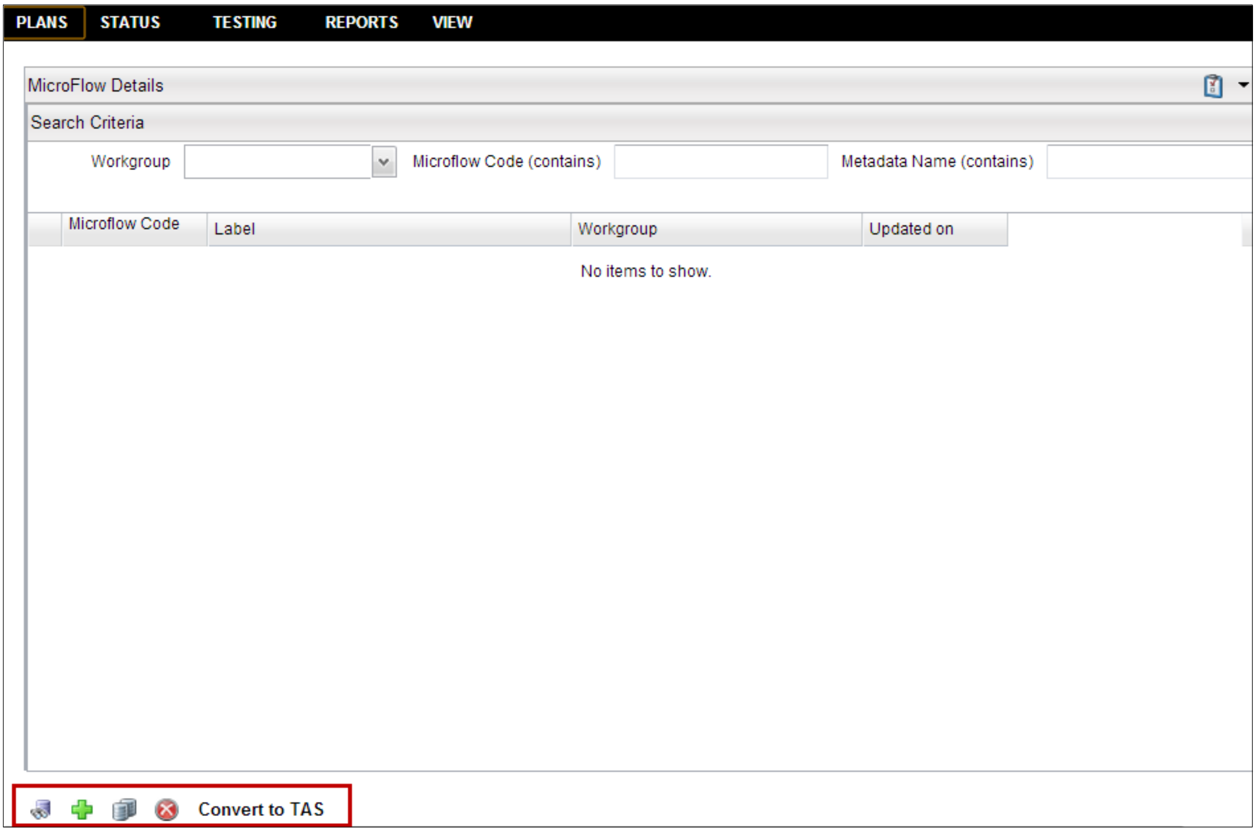


Figure 16 Microflows page

- **Search** button: Display microflow details
- **Add** button: Add a new microflow
- **Copy** button: Make a copy of an existing microflow
- **Delete** button: Delete an existing microflow
- **Convert to TAS** button: Convert the microflow into TAS (see the next section for details)

4.3.1 Perform a Microflow Search

To perform a search, enter your search criteria in the **Workgroup** or **Microflow Code**, or **Metadata Name (contains)** fields and then click the **Search** button ( ). The following screen displays your search results.

© Ericsson AB 2014
Commercial in confidence

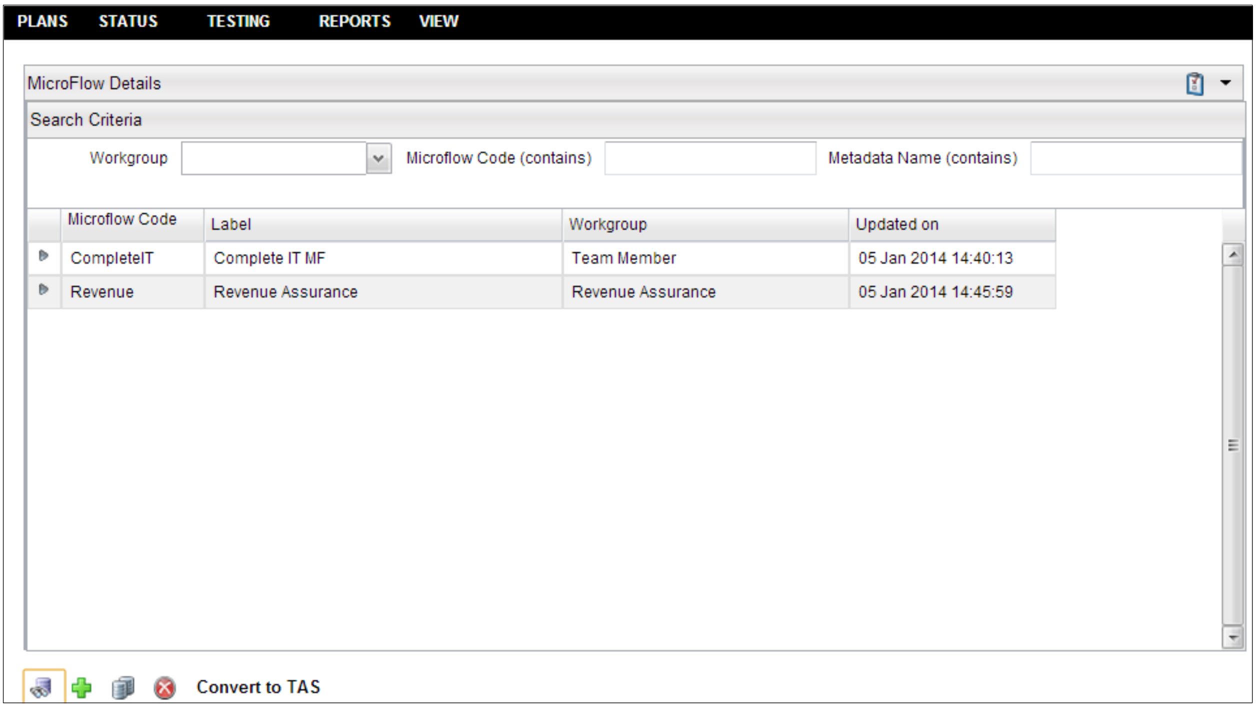


Figure 17 Microflow - search results

You can download the results in different file formats. Click the **Preferences** button ( ) and select one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

4.3.2 Add a New Microflow

To add a new microflow, do the following:

1. From the Microflow search page, click the **Add** button ( ).
2. On the Microflow Details page, enter the appropriate information in the fields provided.

© Ericsson AB 2014
Commercial in confidence

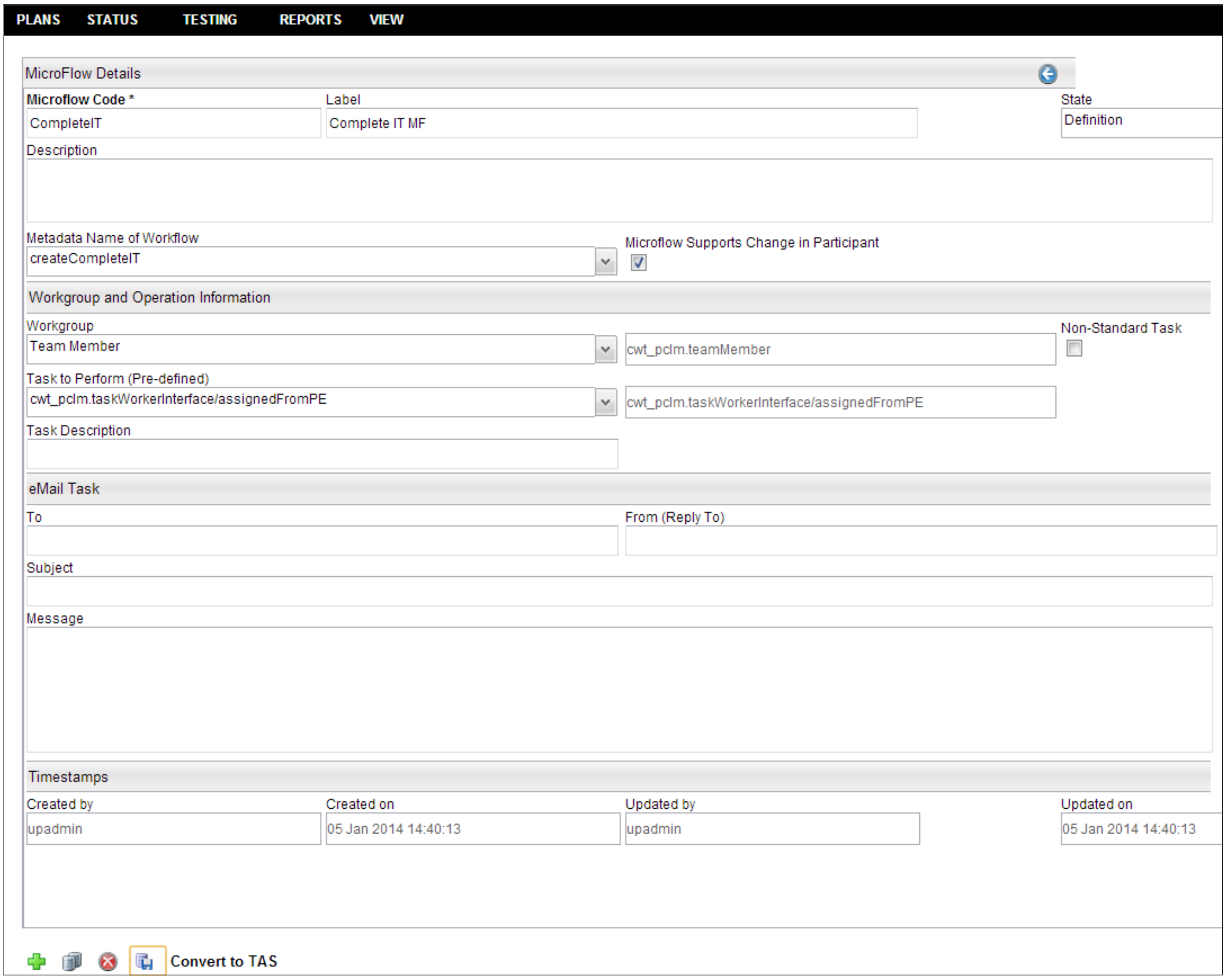


Figure 18 Create a new Microflow

3 Click the **Save** button ( ) to save your changes and create your microflow.

4.3.3 Copy a Microflow

To copy a microflow, do the following:

1 Select the microflow that you want to copy from your search results and click the **Copy** button ( ).

2 The MicroFlow Details page appears with a copy of the selected microflow. Make any changes to the copy and click the **Save** button ( ).

4.3.4 Delete a Microflow

To delete a microflow, do the following:

© Ericsson AB 2014
Commercial in confidence

1 Select the microflow that you want to delete from search results list and click the **Delete** button ( ).
2 A confirmation dialog appears. Click the **Yes** button to delete the selected microflow.

4.3.5 Convert To TAS

The following are the steps to convert a microflow into a TAS:

1 On Microflow Details page, select a microflow from result list.
2 Click the **Convert to TAS** button.
3 The selected microflow will be added as Technical Action Specification.

4.4 Technical Action Specifications

A Technical Action Specification (TAS) consists of a microflow, along with any parameters, conditions, and compensating actions. The TAS is a reference to the microflow that is required to be invoked for each component that requires fulfillment.

Each TAS, unless it is a terminal or final activity in the fulfillment plan, or a branch of the plan, specifies the next TASs to be processed. A TAS is a reference to a microflow and the relationship is N:1 (that is, more than one activity may reference the same underlying workflow). Each TAS has a description, which defaults to the workflow description itself.

Clicking **Plans** > **Technical Action Specifications** allows you to perform the following actions and displays the Search page for all technical action specifications:

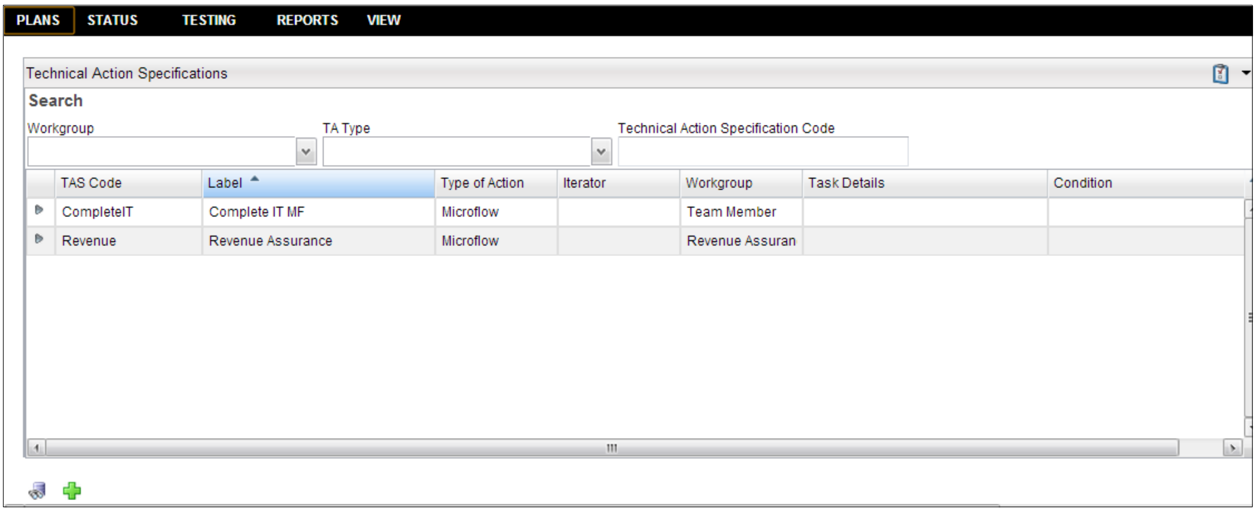


Figure 19 Technical Action Specifications

- **Search** button: Display TAS details
- **Add** button: Add a new TAS

4.4.1 Perform a TAS Search

To perform a search, enter your search criteria in the fields and then click the **Search** button ( ). You can search on **Workgroup**, **TA Type** (Microflow, Sub Plan, Poll, Script, and Join), or on **Technical Action Specification Code**. The search results contain the following fields for each TAS:

- **TAS Code**
- **Label**
- **Type of Action**
- **Iterator**
- **Workgroup**
- **Task Details**
- **Condition**

The following screen displays your search results:

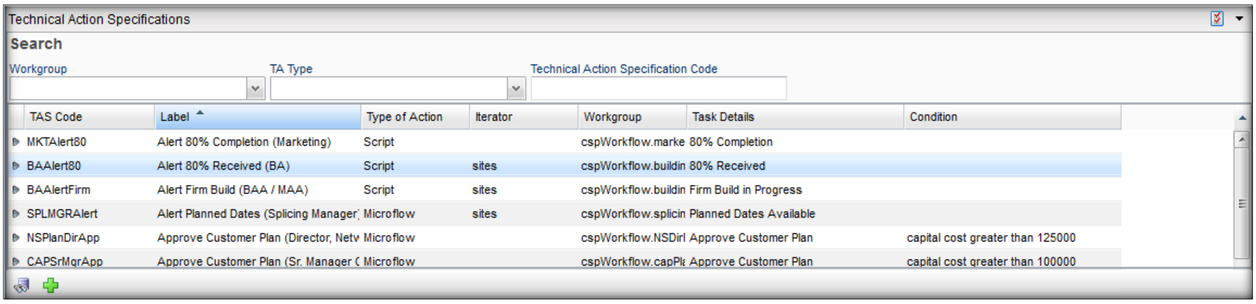


Figure 20 Technical Action Specifications - Search results

You can download the results in different file formats by. Click the **Preferences** button ( ) and select one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

4.4.2 Add a New TAS

To add a new TAS, click the Add button ( ) from TAS search page. On the Technical Action Specifications page, select one option from the **Type of Action** drop-down menu. The following options are available in the list :

- **Microflow**
- **Subplan**
- **Poll**
- **Script**
- **Join**

© Ericsson AB 2014
Commercial in confidence

The rest of the fields displayed as per the selection. For each type of TAS, information for the **Updated by**, **Updated on**, and **Created on** fields is generated by the system automatically.

4.4.2.1 Add a New Microflow TAS

To add a new Microflow TAS, do the following:

1 From the drop-down list of Type **of Action,** select Microflow option.

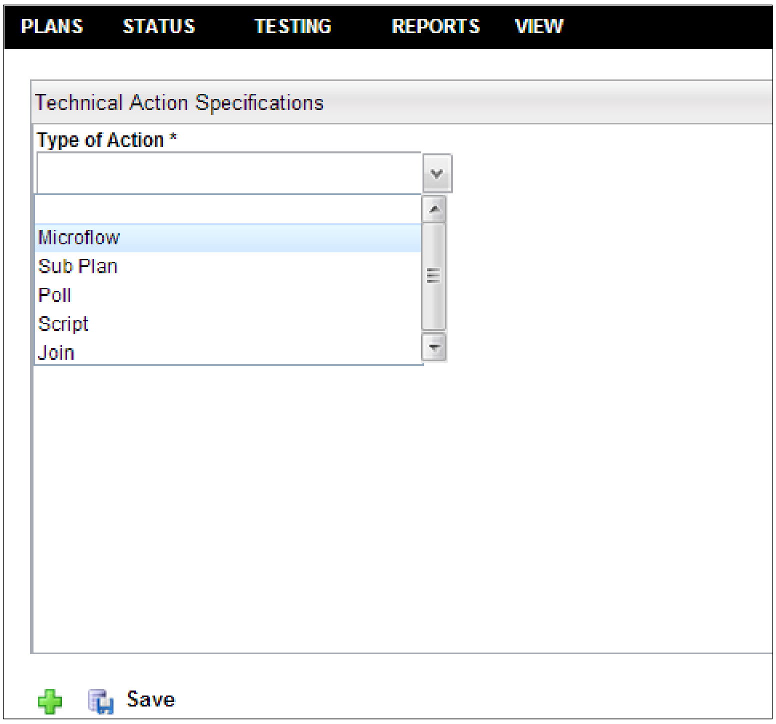


Figure 21 Add a microflow TAS

2 The Technical Action Specifications page appears with the rest of the fields:

© Ericsson AB 2014
Commercial in confidence

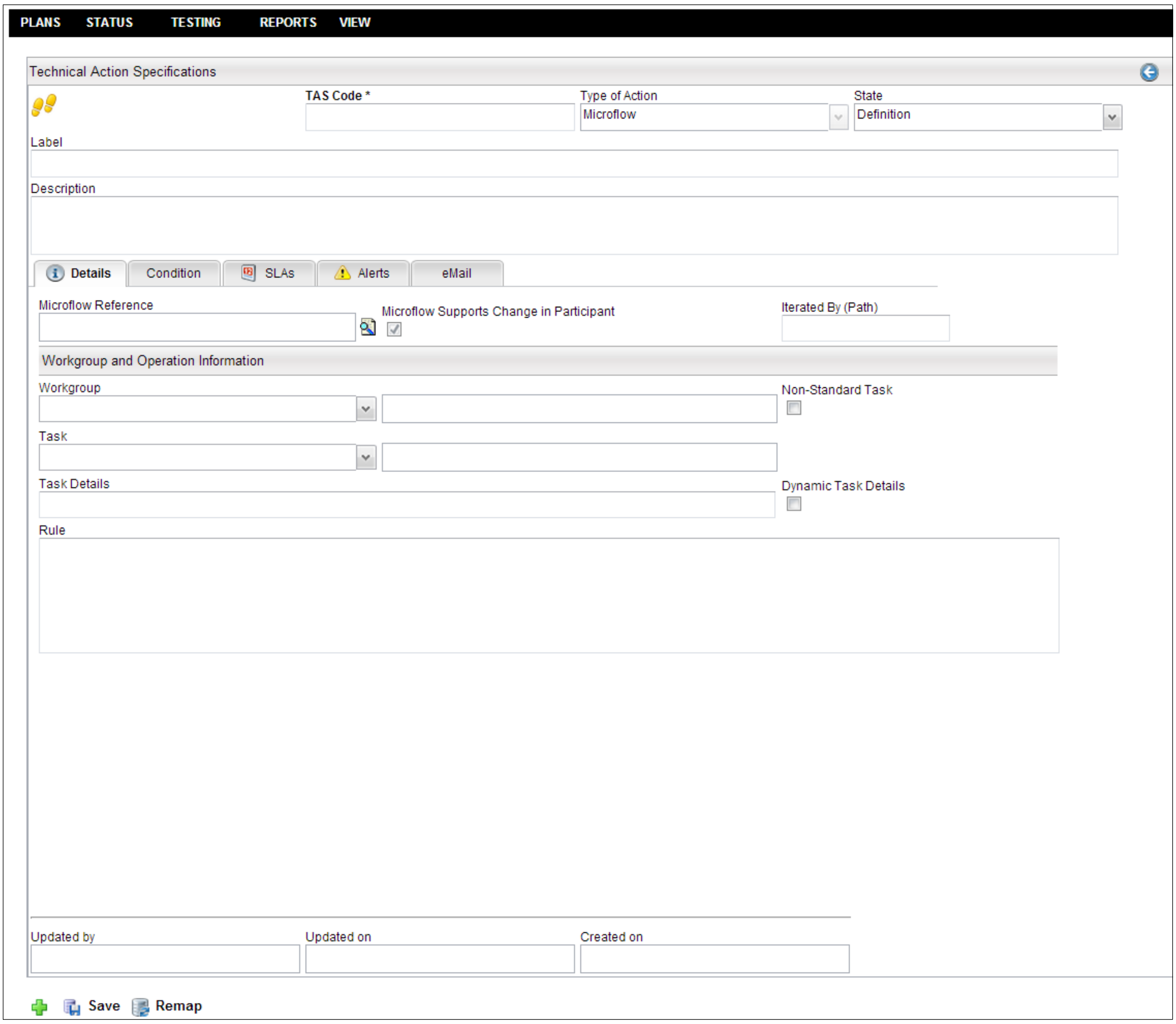


Figure 22 Microflow TAS fields

3 Enter information in **TAS Code**, **State**, **Label**, and **Description** fields.

4 The **Details** tab allows you to enter workgroup and operation information. The following fields are available:

- Mcroflow Reference
- Microflow Supports Change in Participant
- Iterated By (Path)
- Workgroup
- Non-standard Task
- Task
- Task Details
- Dynamic Task Details
- Rule

© Ericsson AB 2014
Commercial in confidence

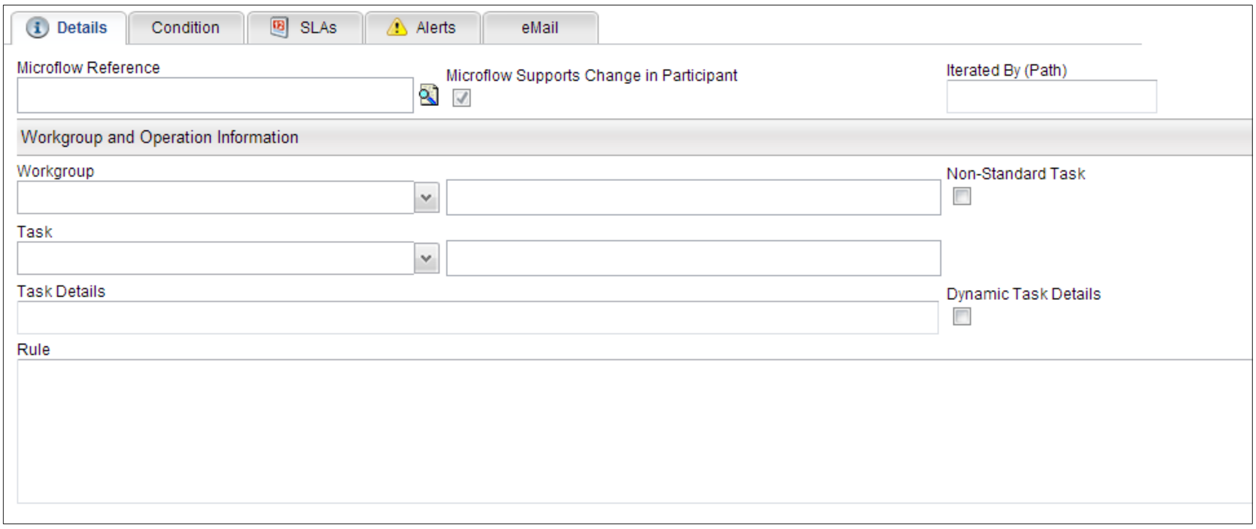


Figure23 Microflow TAS Details tab

5 Click the **Condition** tab. A TAS is a reference to the microflow that is required to be invoked for each component that requires fulfillment. Complete these steps:

a Each TAS may carry a conditional expression that requires evaluation. If provided, and the condition evaluates to something other than *true*, the step is bypassed and the step's prerequisites are assumed to have not been met. Select the **Conditional?** Checkbox.

b Click the **Condition Action Type** field and select a value from the list. You can also provide a condition description in the **Description of Condition** field.

c Add information in the **Rules** field. Physically, the condition expression is a JavaScript expression that passes the following variables:

- The order
- Production plan parameters

You can use the **Rule** field to implement conditional branching (that is, define a TAS for each branch or case statement, and define the condition for each case on the respective TASs).

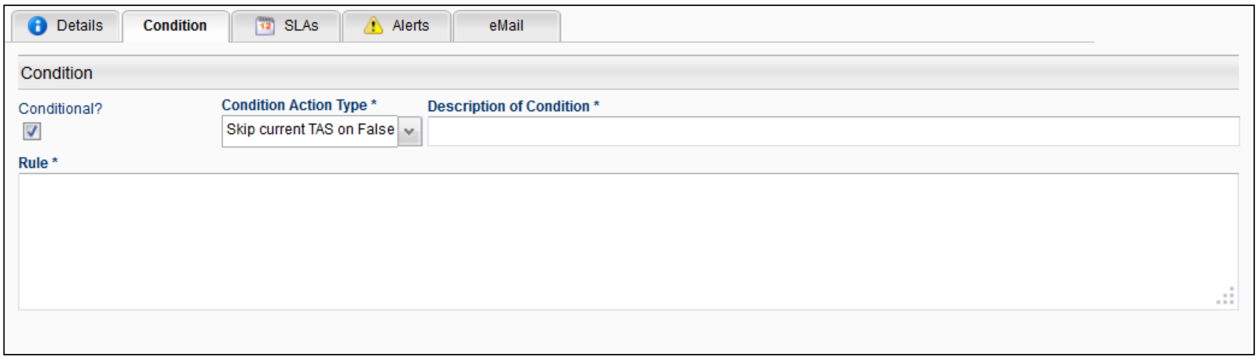
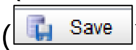


Figure 24 Microflow TAS Condition tab

© Ericsson AB 2014
Commercial in confidence

6 Click the **SLAs** tab. Each TAS can include an expression intended to return either a fixed amount of time, or a specific date and time, that sets the expected SLA for the TAS. Click the **Add** button (

) to specify a duration time for your TAS. Click the **Save** button (

) to save your changes.

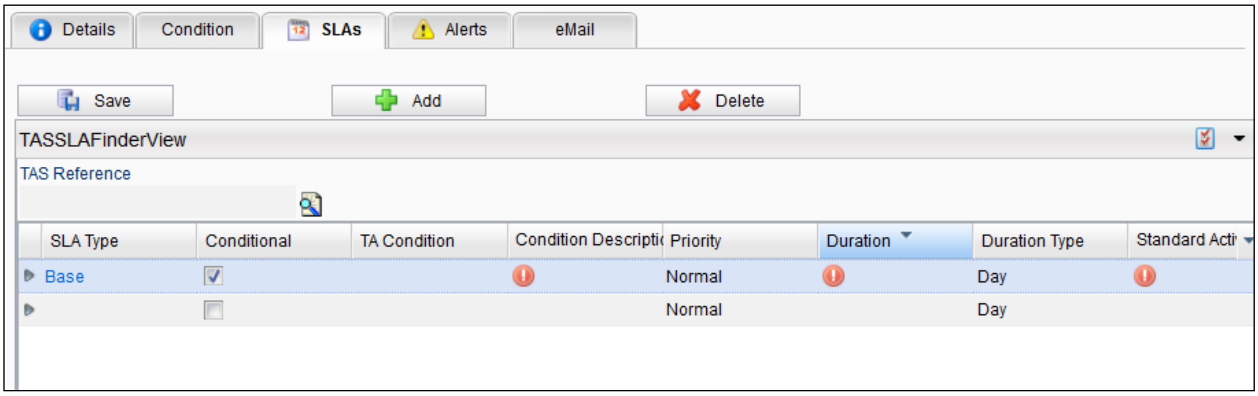


Figure 25 Microflow TAS - SLAs tab

7 Click the **Alerts** tab. In every TAS, you can configure alerts by duration and by group. You can create up to two alerts for each group to notify. Select the **Alert on Overdue** checkbox if you want to get an alert on any overdue TAS.

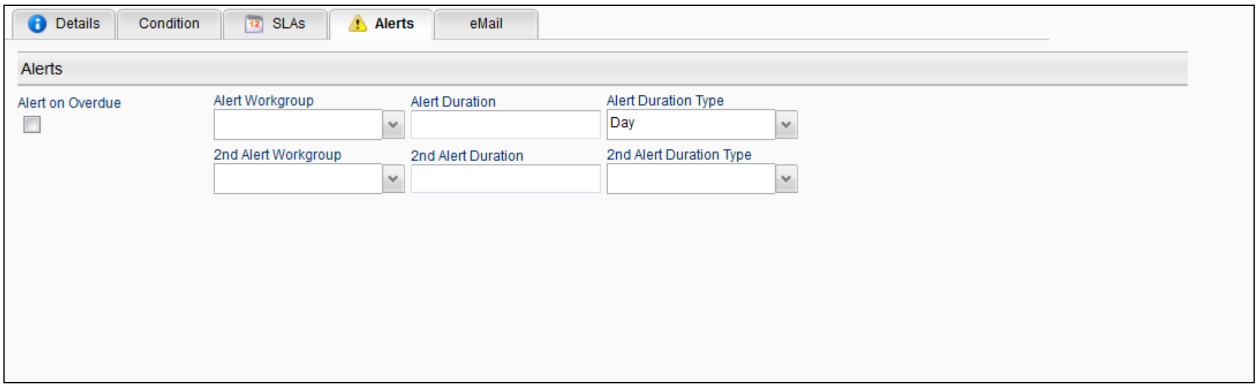


Figure 26 Microflow TAS - Alerts tab

8 Click the **eMail** tab. For each TAS, you can configure e-mails messages to send and inform stakeholders. If

© Ericsson AB 2014
Commercial in confidence

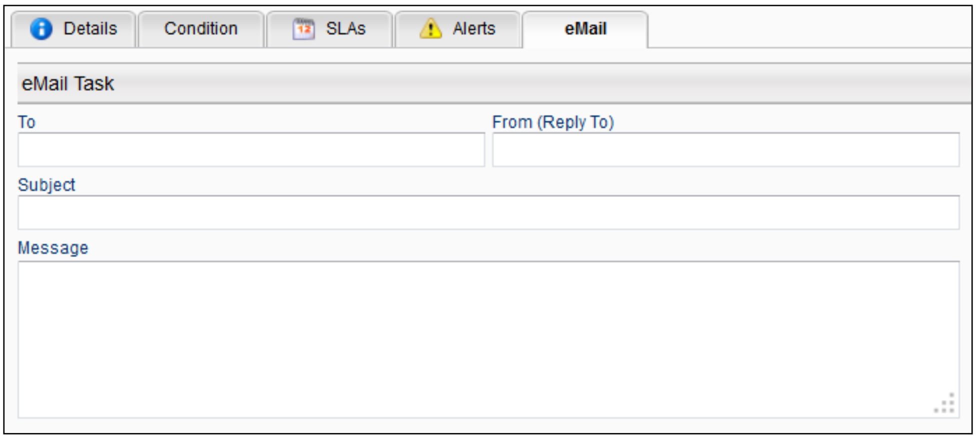


Figure 27 Microflow TAS - E-mail tab

Note: If TAI.emailTo is defined in the metadata, an e-mail is sent through processAction_createAlert() and processAction_createTask() script. These two scripts are used in the cwt_sof.genericMicroflow process.

To send an e-mail, you must include the cwt_sof.genericMicroflow process in the microflow, and provide information for the To, From (Reply to), Subject, and Message fields from the TAS page.

9 Click the **Save** button ( ) to save your changes and create your Microflow TAS.

4.4.2.2 Add a New Sub Plan TAS

To add a new Sub Plan TAS, do the following:

1 From the drop-down list of **Type of Action**, select **Sub Plan.**
2 The Technical Action Specifications page appears with the rest of the fields:

© Ericsson AB 2014
Commercial in confidence

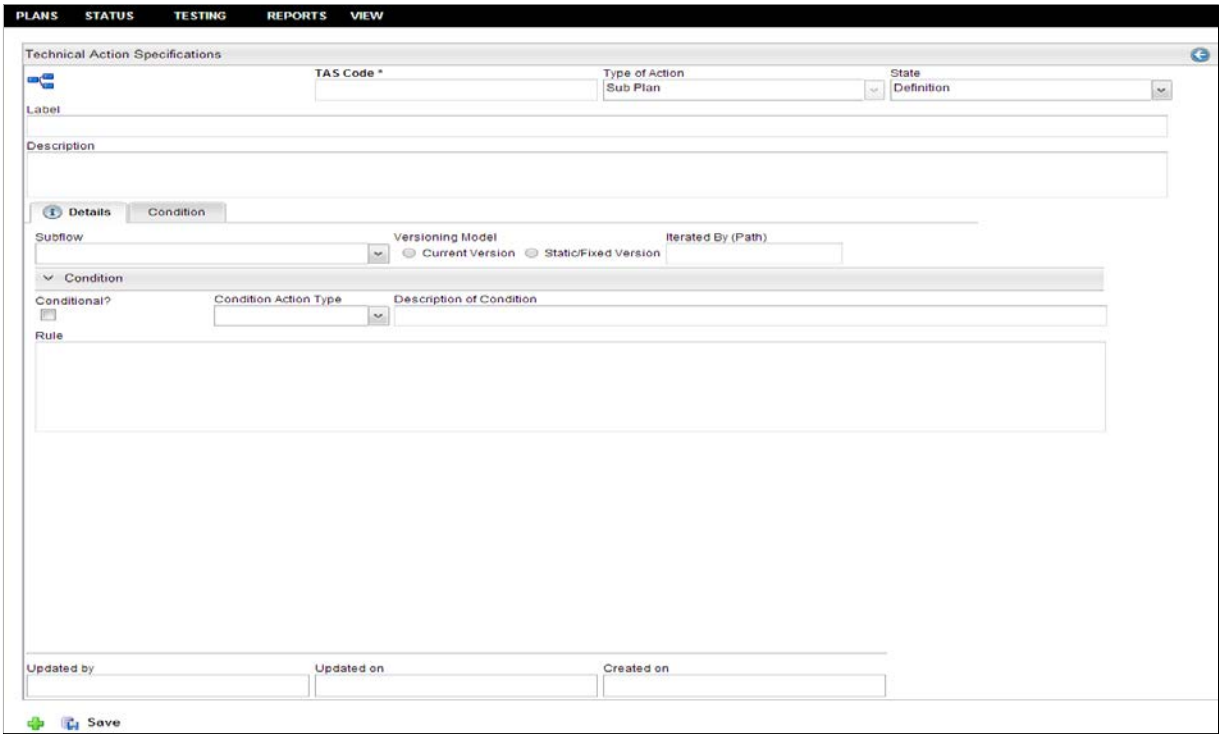


Figure 28 Sub Plan TAS

3 Enter the TAS Code, State, Label, and Description fields.

4 The **Details** tab allows you to enter workgroup and operation information. You can specify the following fields:

- **Subflow**
- **Versioning Model**
- **Iterated By (Path)**

Figure 29 Sub Plan Details.

5 Click the **Condition** tab. A TAS is a reference to the Sub Plan that is required to be invoked for each component that requires fulfillment. Complete these steps:

a Each TAS may carry a conditional expression that requires evaluation. If provided, and the condition evaluates to something other than *true*, the step is bypassed and the step's prerequisites are assumed to have not been met. Select the **Conditional?** Checkbox.

b Click the **Condition Action Type** field and select a value from the list. You can also provide a condition description in the **Description of Condition** field.

c Add information in the **Rules** field. Physically, the condition expression is a JavaScript expression that passes the following variables:

© Ericsson AB 2014
Commercial in confidence

- The order
- Production plan parameters

You can use the **Rule** field to implement conditional branching (that is, define a TAS for each branch or case statement, and define the condition for each case on the respective TASs).

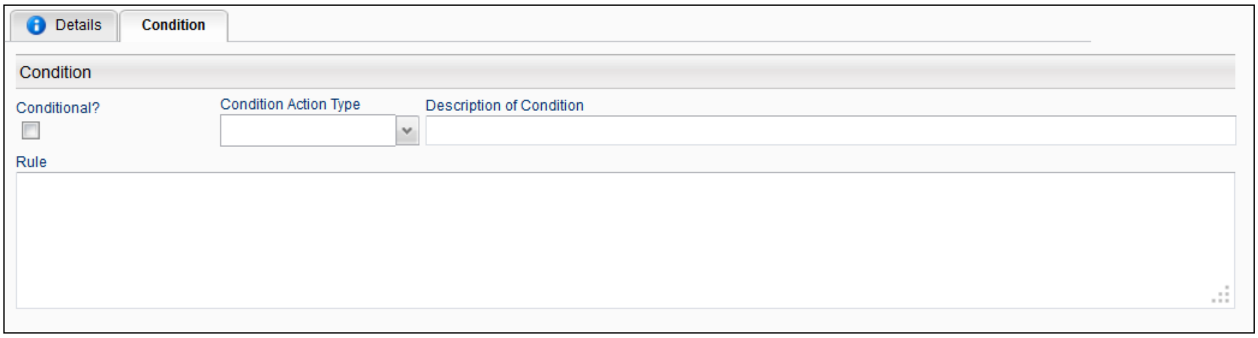


Figure 30 Add a Sub Plan TAS - Condition tab

6 Click the **Save** button to save changes and create your Sub Plan TAS.

4.4.2.3 Add a New Poll TAS

To add a new Poll TAS, do the following:

1 Select **Poll** from the drop-down list of **Type of Action**.
2 The Technical Action Specifications page appears with the rest of the fields:

© Ericsson AB 2014
Commercial in confidence

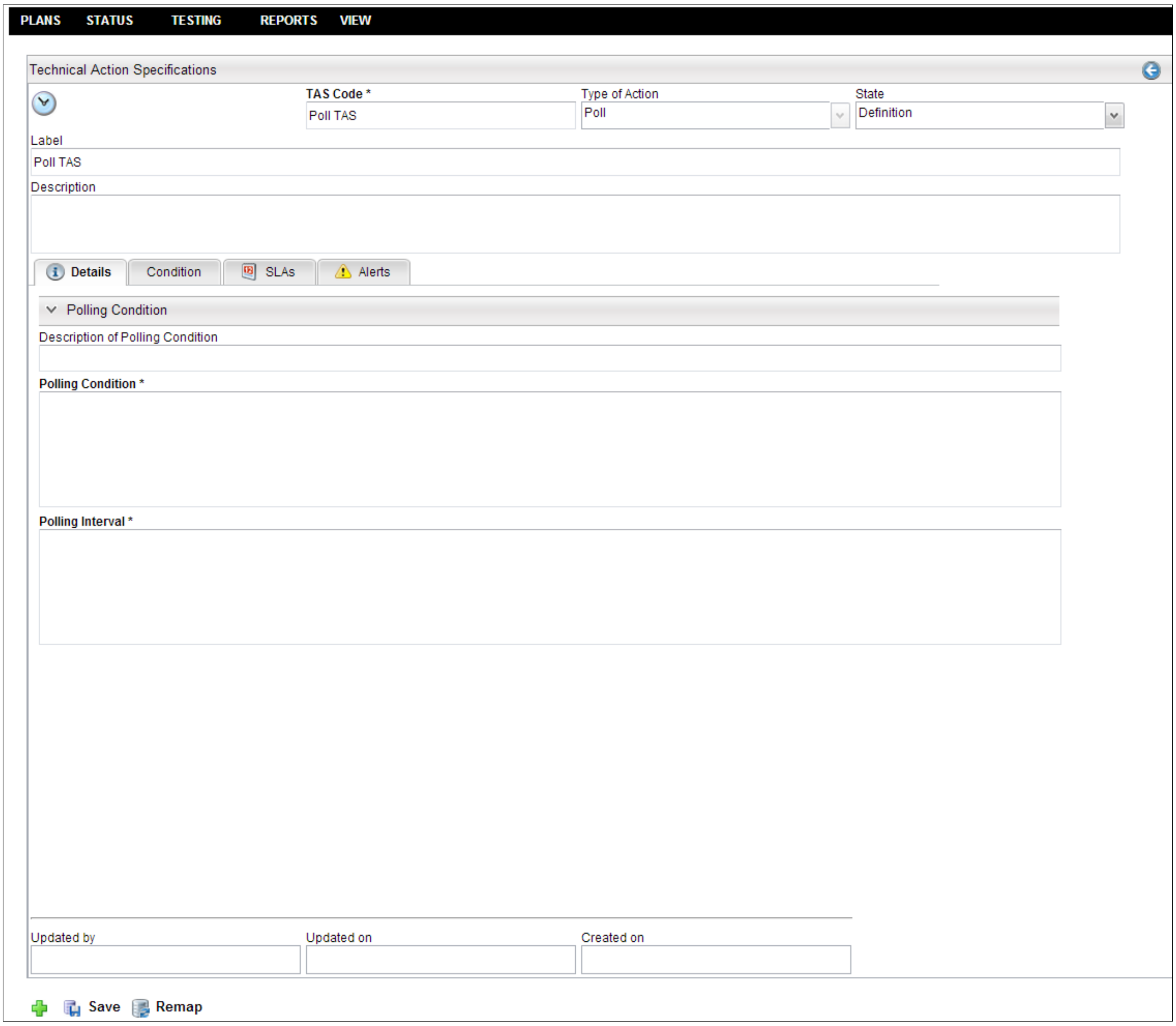


Figure 231 Poll TAS

3 Enter or select information in the **TAS Code**, **State, Label,** and **Description** fields.

4 The **Details** tab displays **Polling Condition** information. You can specify the following fields:

a **Description of Polling Condition**
b **Polling Condition**
c **Polling Interval**

Notes:

- The Poll activity and Poll TAS are completed if the polling condition is empty, true, or returns null. If polling condition is empty, true, or returns null, the polling interval is considered to be zero.
- If polling condition return false, the poll interval is used. The poll waits for the number of seconds returned by the interval script and tries to re-evaluate poll condition again.

© Ericsson AB 2014
Commercial in confidence

5 Click the **Condition** tab. A TAS is a reference to the poll that is required to be invoked for each component that requires fulfillment. Complete these steps:

6 A TAS is a reference to the Sub Plan that is required to be invoked for each component that requires fulfillment. Complete these steps:

   a Each TAS may carry a conditional expression that requires evaluation. If provided, and the condition evaluates to something other than *true*, the step is bypassed and the step's prerequisites are assumed to have not been met. Select the **Conditional?** Checkbox.

   b Click the **Condition Action Type** field and select a value from the list. You can also provide a condition description in the **Description of Condition** field.

   c Add information in the **Rules** field. Physically, the condition expression is a JavaScript expression that passes the following variables:

   - The order
   - Production plan parameters

   You can use the **Rule** field to implement conditional branching (that is, define a TAS for each branch or case statement, and define the condition for each case on the respective TASs).

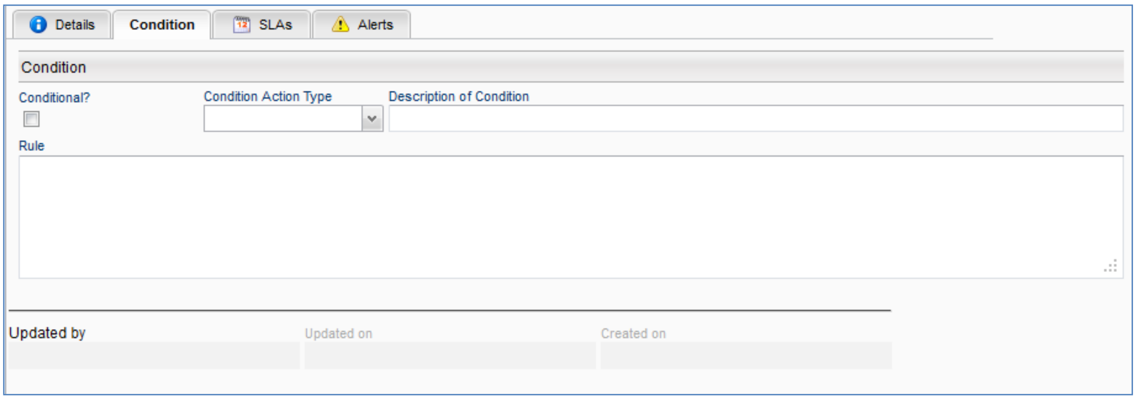
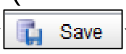


Figure 32 Add a new Poll TAS - Condition tab

7 Click the **SLAs** tab. Each TAS can include an expression intended to return either a fixed amount of time, or a specific date and time, that sets the expected SLA for the TAS. You can click the **Add** button (

) to specify a duration time for your TAS. Click the **Save** button (

) to save and continue.

© Ericsson AB 2014
Commercial in confidence

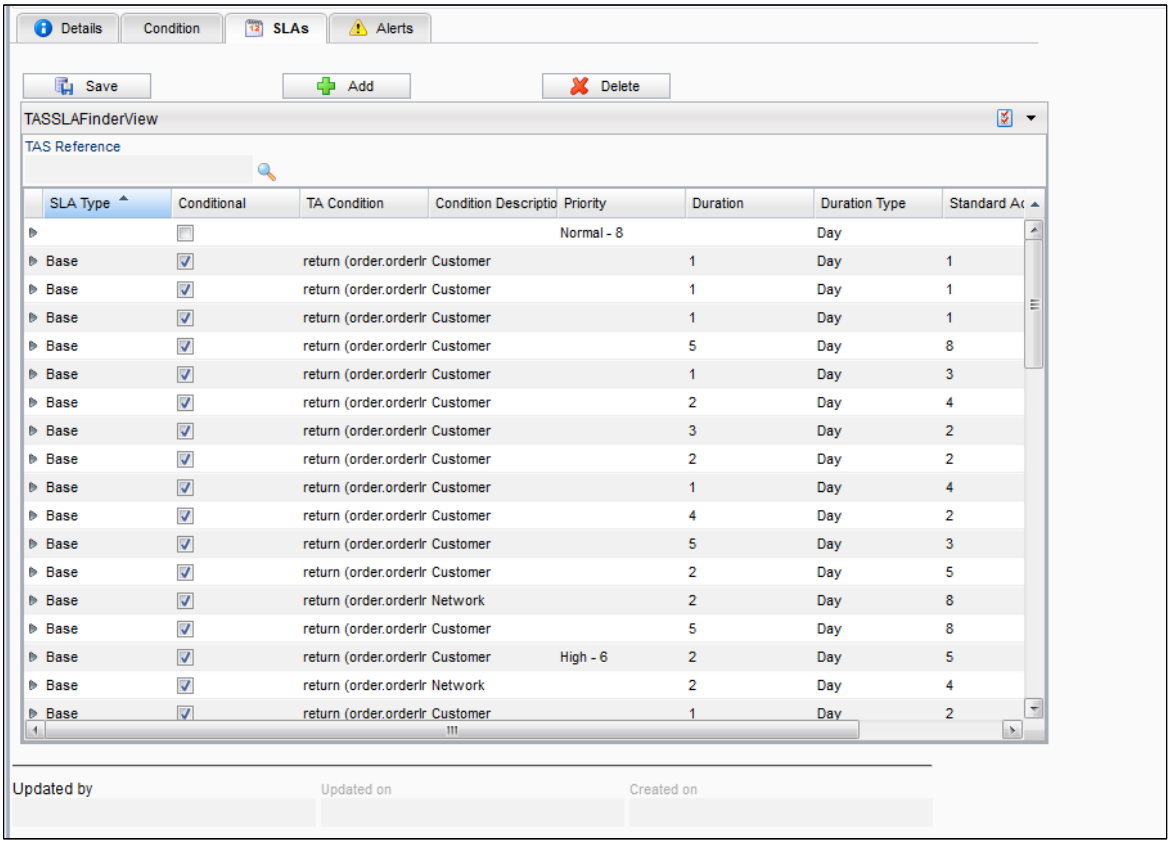


Figure 33 Add a new Poll TAS - SLAs tab

8 Click the **Alerts** tab. In every TAS, you can configure alerts by duration and by group. You can create up to two alerts for each group that you want to notify. Select the **Alert on Overdue** checkbox if you want to be alerted on any overdue TAS.

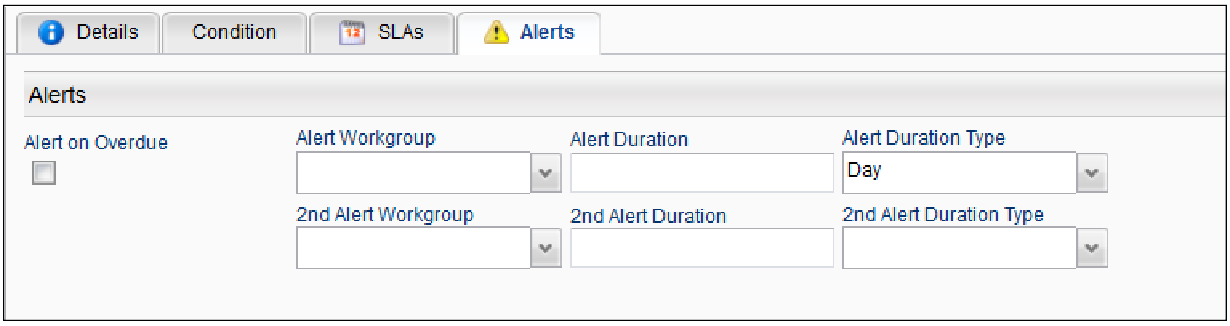


Figure 34 Add a Poll TAS - Alerts tab

9 Click the **Save** button to save changes and create poll TAS.

4.4.2.4 Add a New Script TAS

To add a new Script TAS, do the following:

© Ericsson AB 2014
Commercial in confidence

1 Select **Script** from the drop-down list of **Type of Action**.

2 The Technical Action Specifications page appears with the rest of the fields:

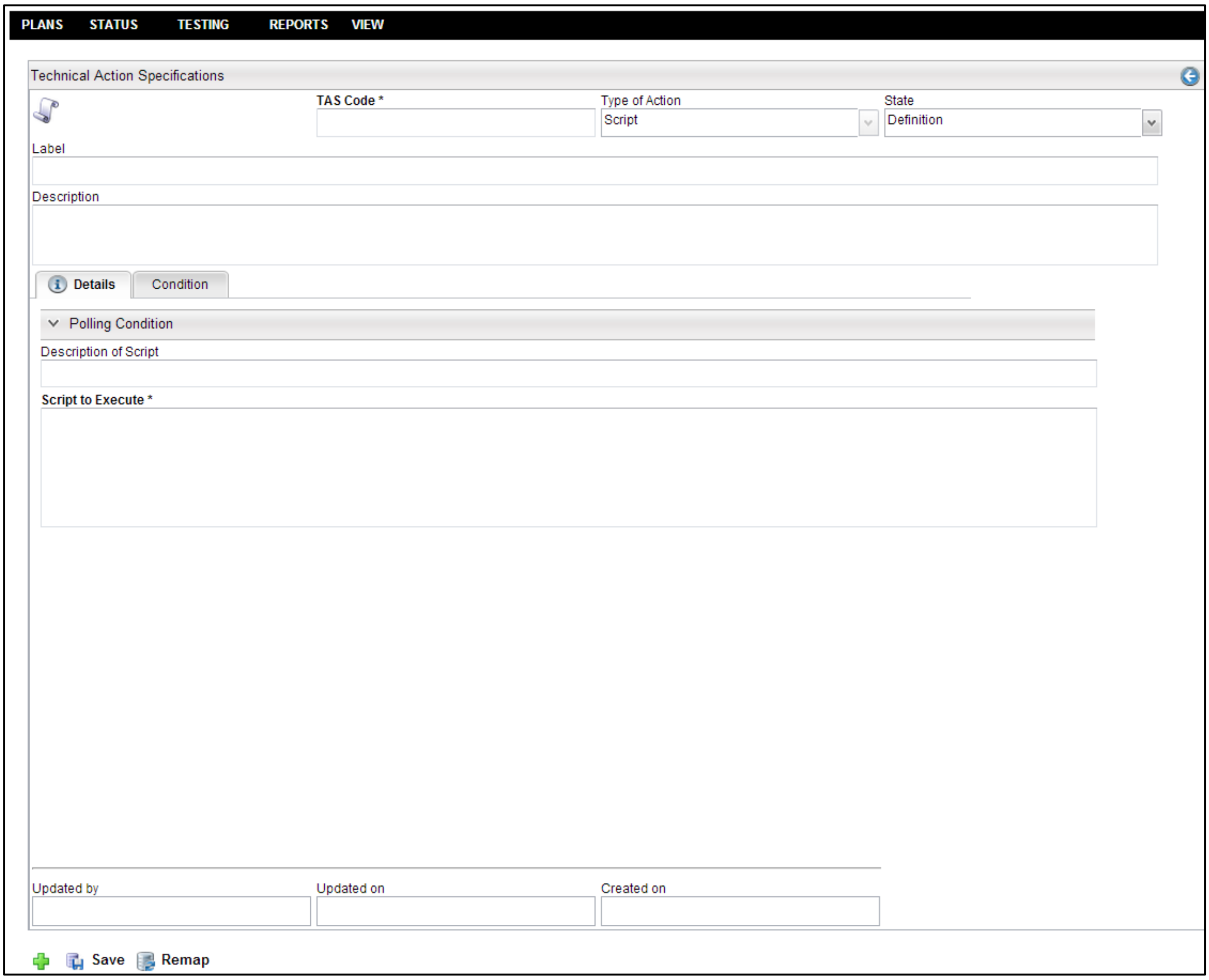


Figure 35 Script TAS fields

3 Enter information for the **TAS Code**, **Label,** and **Description** fields and select a state from the **State** field.

4 The **Details** tab allows you to specify the following fields for polling condition:

- Polling Condition
- Script to Execute

© Ericsson AB 2014
Commercial in confidence

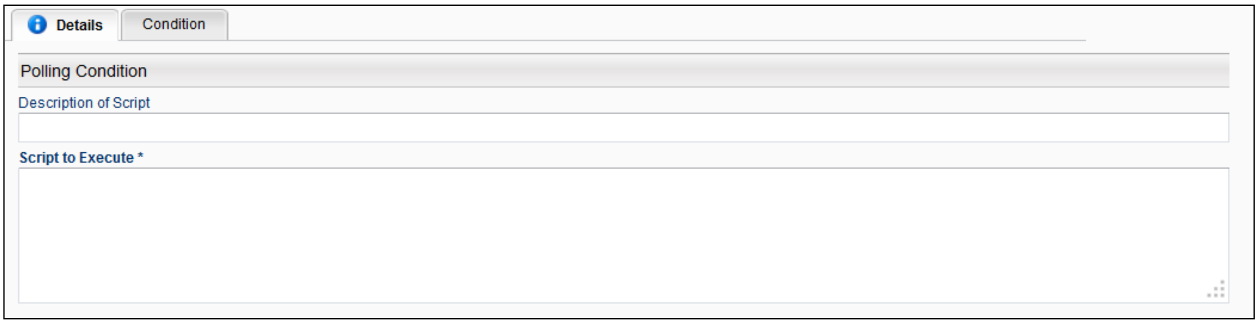


Figure 36 Script Details.

5 Click the **Condition** tab. A TAS is a reference to the Sub Plan that is required to be invoked for each component that requires fulfillment. Complete these steps:

a Each TAS may carry a conditional expression that requires evaluation. If provided, and the condition evaluates to something other than *true*, the step is bypassed and the step's prerequisites are assumed to have not been met. Select the **Conditional?** Checkbox.

b Click the **Condition Action Type** field and select a value from the list. You can also provide a condition description in the **Description of Condition** field.

c Add information in the **Rules** field. Physically, the condition expression is a JavaScript expression that passes the following variables:

- The order
- Production plan parameters

You can use the **Rule** field to implement conditional branching (that is, define a TAS for each branch or case statement, and define the condition for each case on the respective TASs).

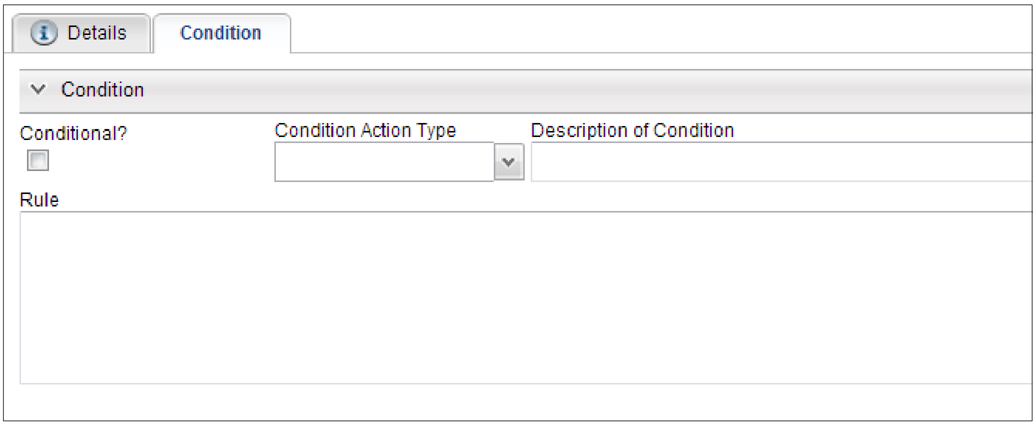


Figure 37 Add a new Script TAS - Condition tab

6 Click the **Save** button to save changes and create Script TAS.

© Ericsson AB 2014
Commercial in confidence

4.4.2.5 Add a New Join TAS

To add a new Join TAS, do the following:

1. Select **Join** from the drop-down list of **Type of Action**.
2. The Technical Action Specifications page appears with the rest of the fields:

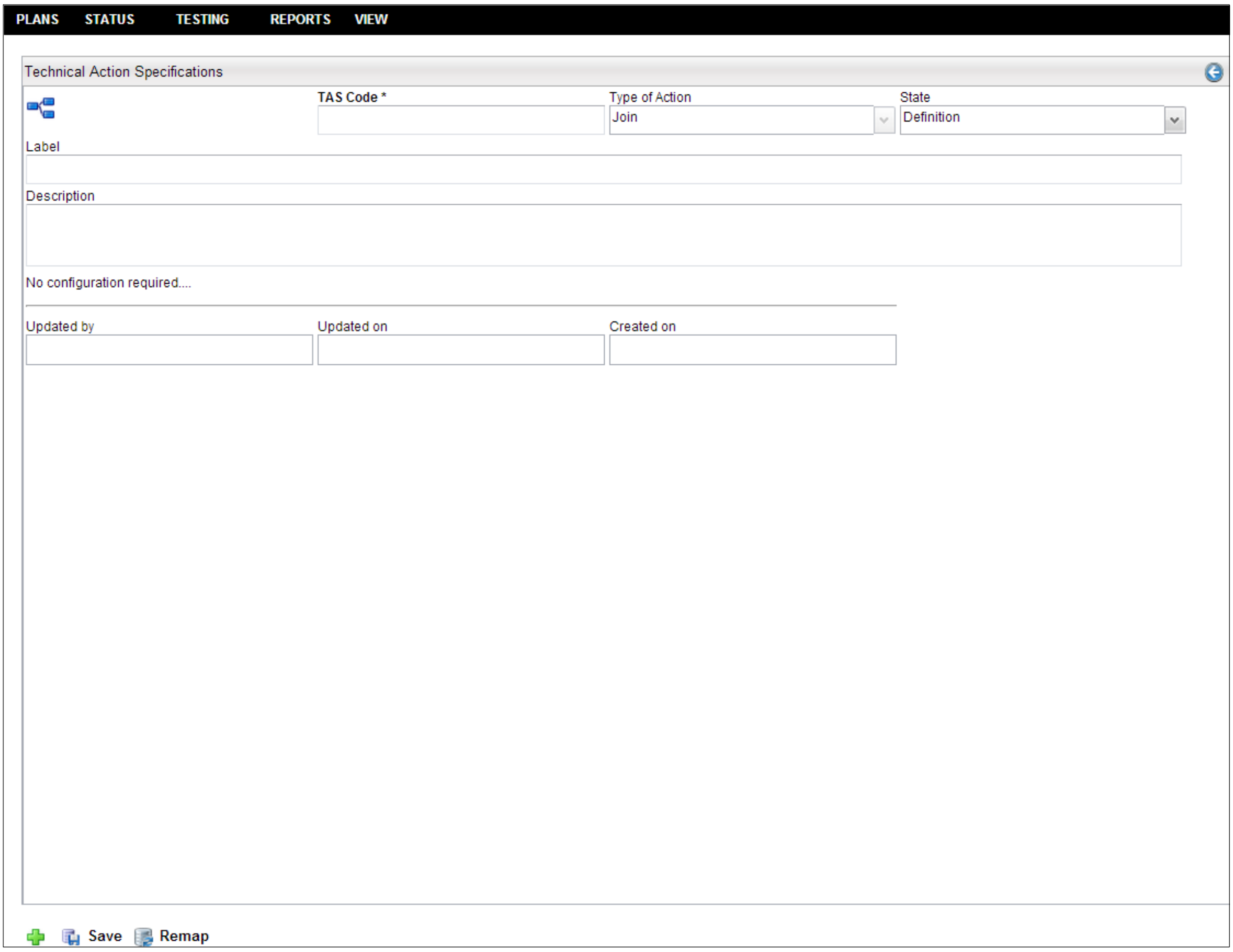


Figure 38 Join TAS fields

3. Enter information for the **TAS Code**, **State, Label,** and **Description** fields.
4. Since there is no other configuration required for a Join TAS, click the **Save** button to save the changes and create a Join TAS.

4.5 TAS SLAs

A **TAS SLA** links the Technical Action Specification (TAS) to a Service Level Agreement (SLA).

Clicking **Plans** > **TAS SLAs** allows you to perform the following actions:

© Ericsson AB 2014
Commercial in confidence

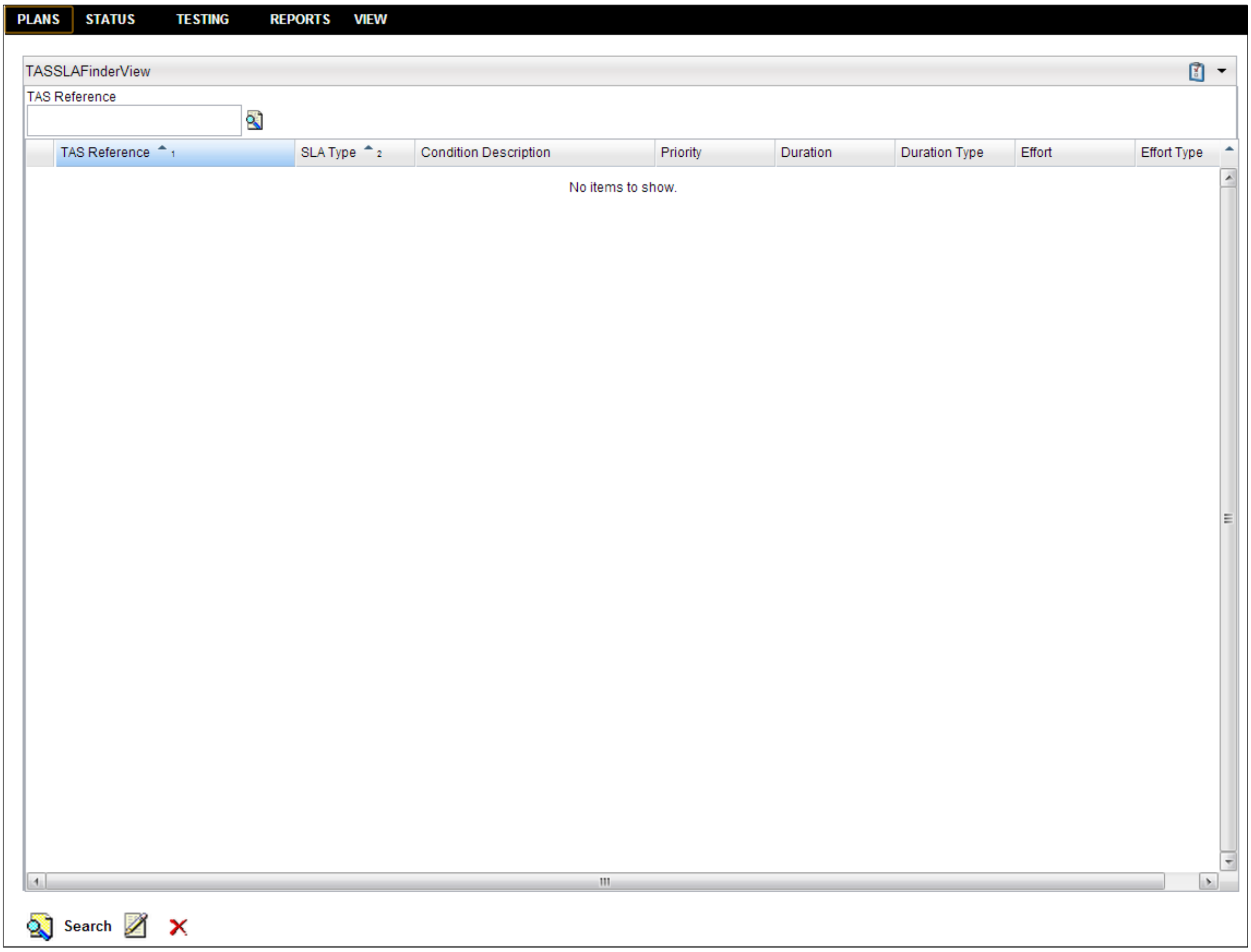


Figure 39 TAS SLAs

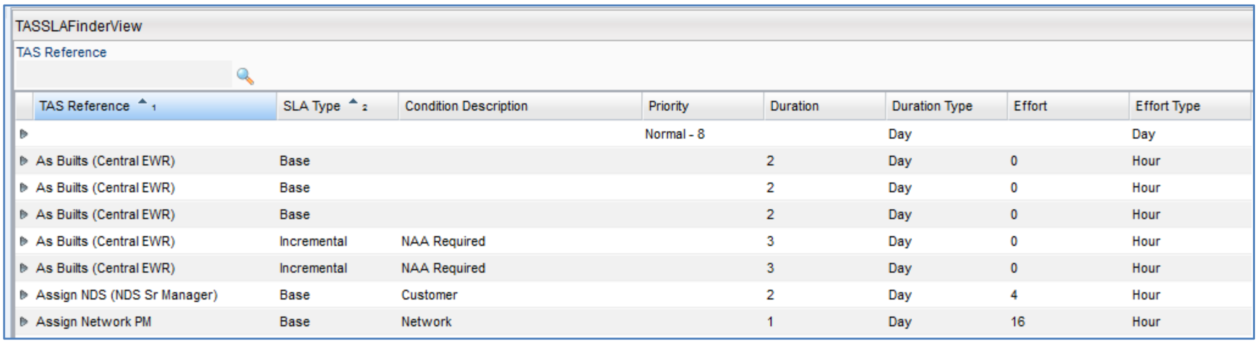
- **Search** button: Display TAS SLA search results.
- **Edit** button: Change and update an existing TAS SLA
- **Delete** button: Delete an existing TAS SLA

4.5.1 Perform a TAS SLA Search

To perform a search, enter your search criteria in the fields and then click the **Search** button. The following screen displays your search results. The search results contain the following fields for each TAS SLA:

- **TAS Reference**
- **SLA Type**
- **Condition Description**
- **Priority**
- **Duration**
- **Duration Type**
- **Effort**
- **Effort Type**

© Ericsson AB 2014
Commercial in confidence



TASSLAFinderView
TAS Reference

TAS Reference	SLA Type	Condition Description	Priority	Duration	Duration Type	Effort	Effort Type
			Normal - 8		Day		Day
As Builts (Central EWR)	Base			2	Day	0	Hour
As Builts (Central EWR)	Base			2	Day	0	Hour
As Builts (Central EWR)	Base			2	Day	0	Hour
As Builts (Central EWR)	Incremental	NAA Required		3	Day	0	Hour
As Builts (Central EWR)	Incremental	NAA Required		3	Day	0	Hour
Assign NDS (NDS Sr Manager)	Base	Customer		2	Day	4	Hour
Assign Network PM	Base	Network		1	Day	16	Hour

Figure 40 TAS SLAs - search results

You can download the results in different file formats by clicking the **Preferences** button ( ) and selecting from one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

4.5.2 Edit a TAS SLA

To edit a TAS SLA, do the following:

1. From the TAS SLAs search page, select a SLA and click the **Edit** button ( ) at the bottom of the page.
2. The TAS SLA record will display. Update the information you want to change.

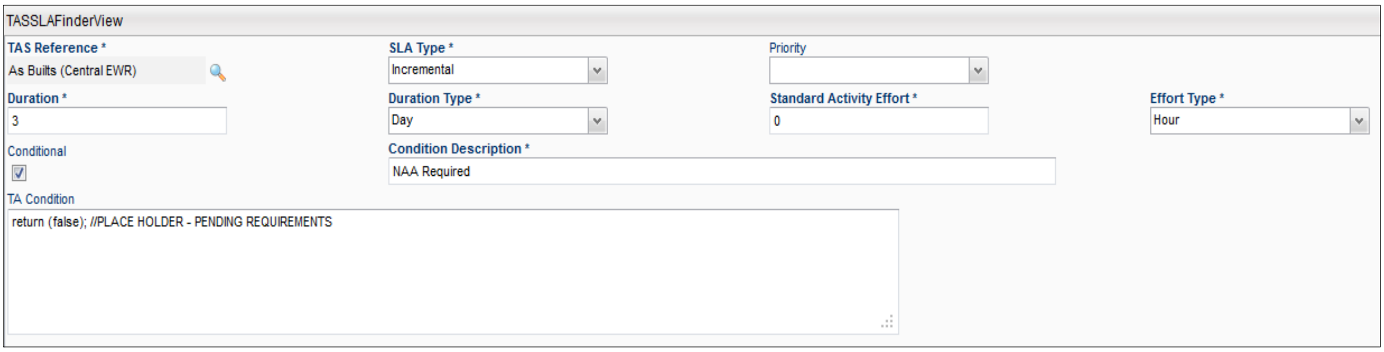


Figure 41 Edit a TAS SLA

3. When you have completed entering your information, click the **Save** button to save your changes.

© Ericsson AB 2014
Commercial in confidence

4.6 Fulfillment Plans

A **fulfillment plan** specifies a series of Transition Action Specifications (TASs) to be processed. The Fulfillment Plan Specification (FPS) consists of a number of TAS definitions that are required to be processed, along with indicating the processing order of each TAS. Each TAS is a microflow.

The controller centrally controls fulfillment plan processing. This controller is responsible for selecting and processing fulfillment plans. It makes its decisions based on triggering events (for example, receiving an order, closing an activity, or receiving a fault).

Each TAS may have prerequisites that drive the processing sequence. At the FPS level, the prerequisites consist of a list of activities that must be performed successfully before this TAS is to be started.

These prerequisites do not preclude using prerequisites within the microflows themselves. The definition of a prerequisite at the FPS level is intended to move the prerequisite evaluation overhead from the microflow to the FPS. Since the FPS consists of the set of activities required to move from one state to another, these prerequisites can be effectively evaluated at the FPS level. Physically, the prerequisites are represented as a comma-delimited list of TAS IDs.

Clicking **Plans** > **Fulfillment Plans** allows you to perform the following actions:

© Ericsson AB 2014
Commercial in confidence

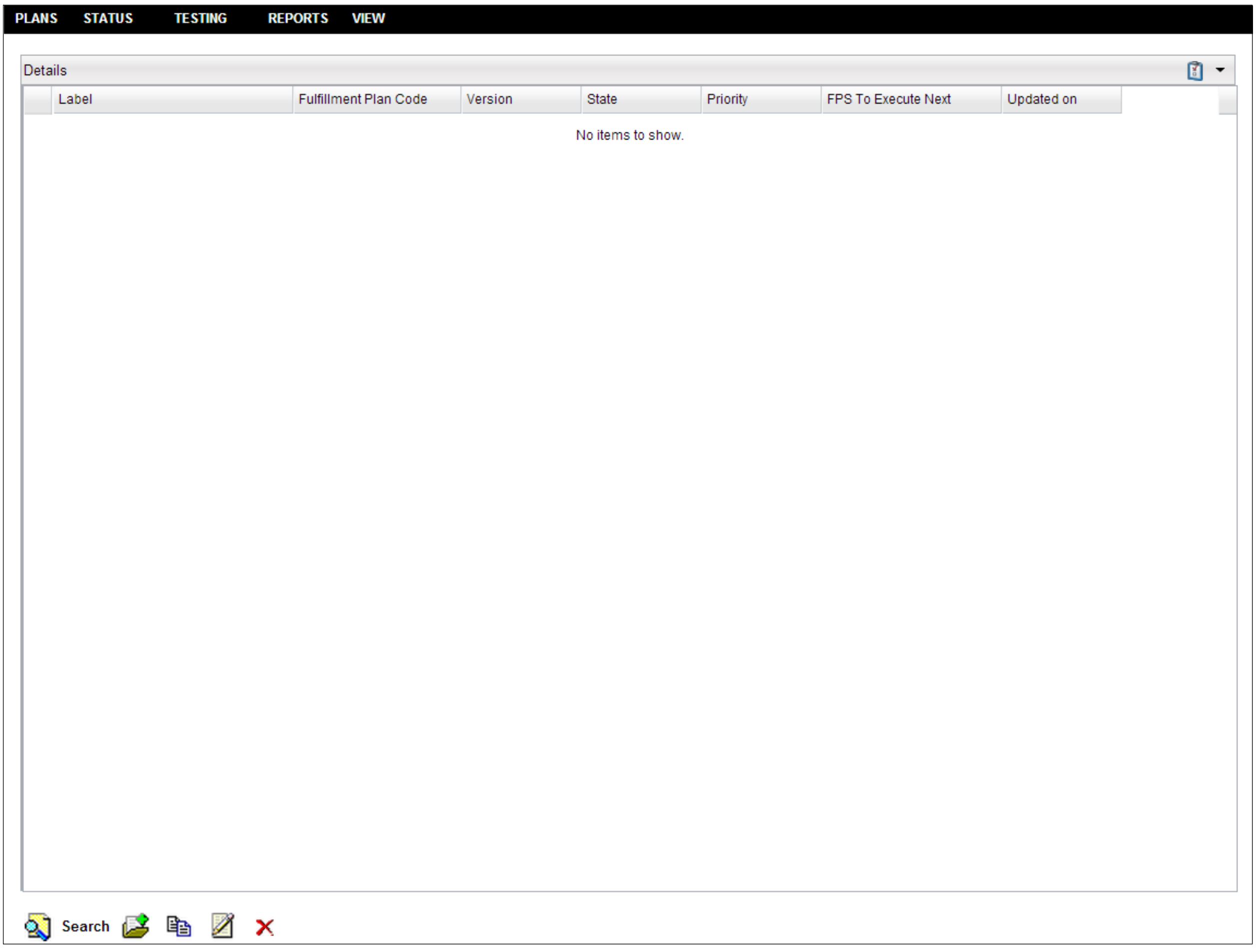


Figure 42 Fulfillment Plans

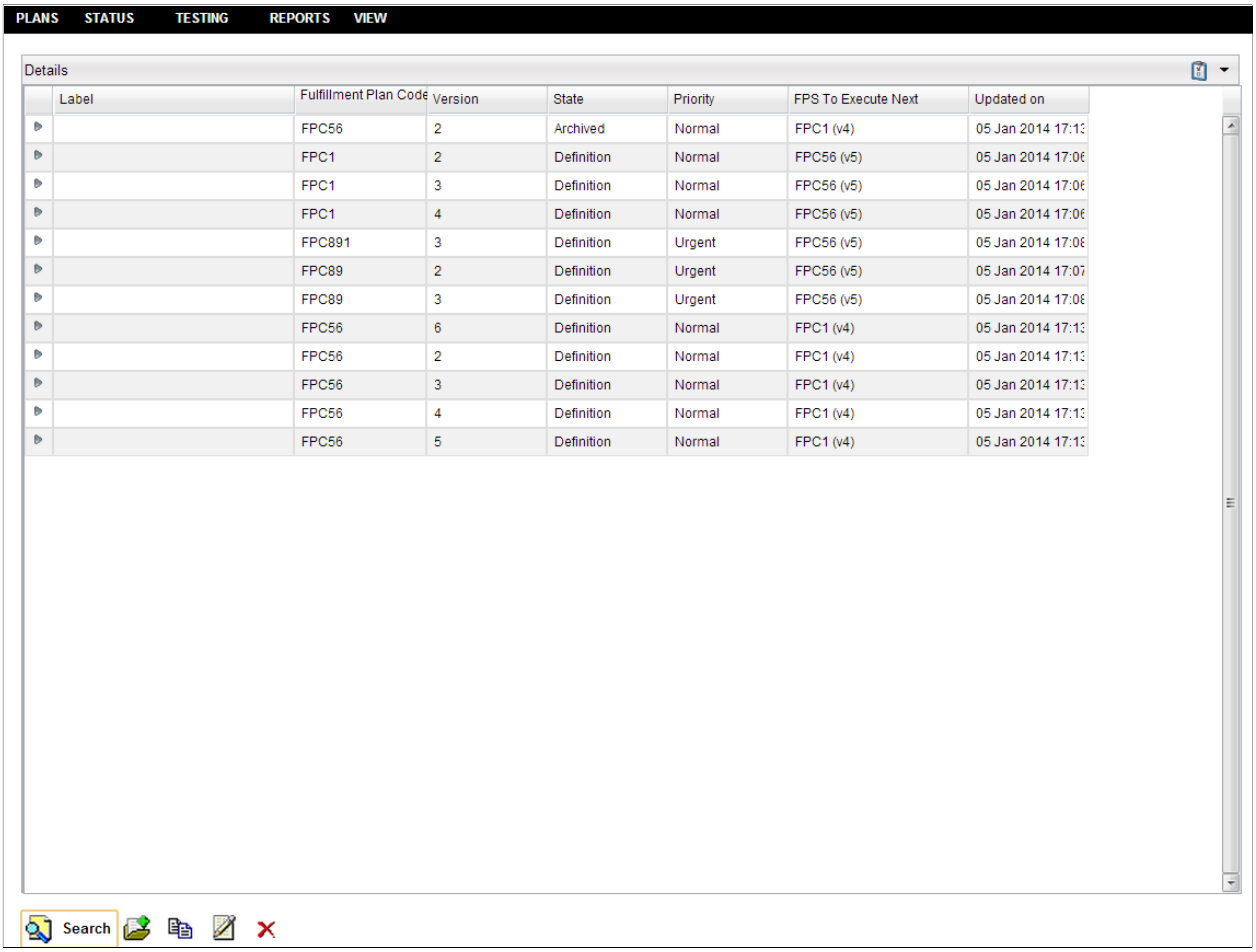
- **Search** button: Display fulfillment plan details
- **Add** button: Add a new fulfillment plan
- **Copy** button: Make a copy of an existing fulfillment plan
- **Edit** button: Change and update an existing fulfillment plan
- **Delete** button: Delete an existing fulfillment plan

4.6.1 Perform a Fulfillment Plan Search

To perform a search, enter your search criteria in the fields provided and then click the **Search** button. The following screen displays your search results. The search results contain the following fields for each fulfillment plan:

- **Label**
- **Fulfillment Plan Code**
- **Version**
- **State**
- **Priority**
- **FPS to Execute Next**
- **Updated on**

© Ericsson AB 2014
Commercial in confidence



Label	Fulfillment Plan Code	Version	State	Priority	FPS To Execute Next	Updated on
	FPC56	2	Archived	Normal	FPC1 (v4)	05 Jan 2014 17:13
	FPC1	2	Definition	Normal	FPC56 (v5)	05 Jan 2014 17:06
	FPC1	3	Definition	Normal	FPC56 (v5)	05 Jan 2014 17:06
	FPC1	4	Definition	Normal	FPC56 (v5)	05 Jan 2014 17:06
	FPC891	3	Definition	Urgent	FPC56 (v5)	05 Jan 2014 17:08
	FPC89	2	Definition	Urgent	FPC56 (v5)	05 Jan 2014 17:07
	FPC89	3	Definition	Urgent	FPC56 (v5)	05 Jan 2014 17:08
	FPC56	6	Definition	Normal	FPC1 (v4)	05 Jan 2014 17:13
	FPC56	2	Definition	Normal	FPC1 (v4)	05 Jan 2014 17:13
	FPC56	3	Definition	Normal	FPC1 (v4)	05 Jan 2014 17:13
	FPC56	4	Definition	Normal	FPC1 (v4)	05 Jan 2014 17:13
	FPC56	5	Definition	Normal	FPC1 (v4)	05 Jan 2014 17:13

Figure 43 Fulfillment Plans - Search Results

In the Fulfillment Plans search results, you can download the results in different file formats by clicking the **Preferences** button ( ) and selecting from one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

4.6.2 Add a New Fulfillment Plan

To add a new fulfillment plan, do the following:

1. From the Fulfillment Plans search page, click the **Add** button ( ).
2. On the Fulfillment Plan Specifications page, enter or select the following information in the fields provided:
   - **Fulfillment Plan Code** (* denotes a mandatory field)
   - **Version**
   - **Label**

© Ericsson AB 2014
Commercial in confidence

- **State**
- **Priority**
- **Standard Workflow Duration**
- **Duration Unit**
- **FP to Execute Next**
- **Technical Actions**

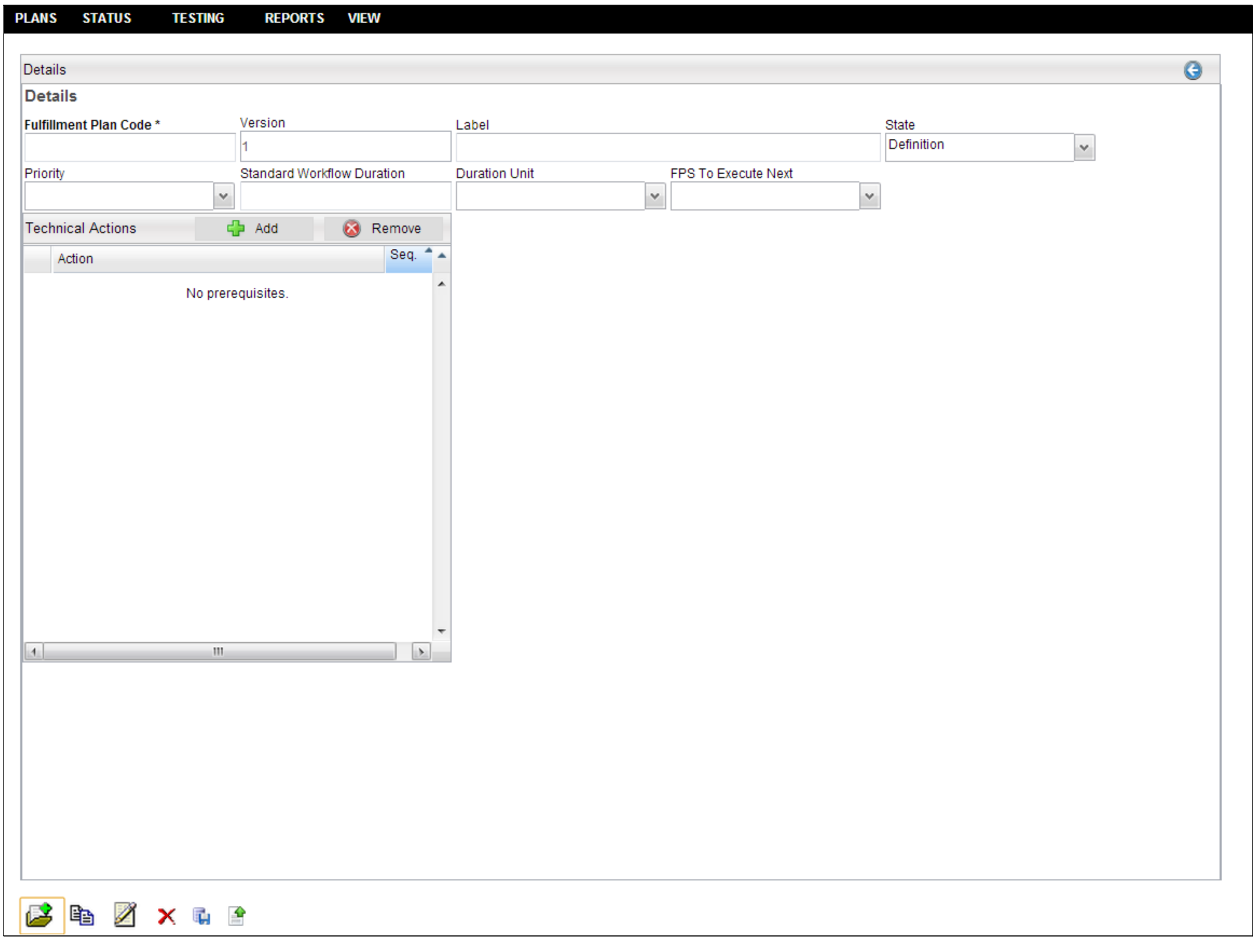


Figure 44 Create a New Fulfillment Plan Specification

3 When you have completed entering your information, click the **Save** button to save your changes and create your fulfillment plan.

4 You can use the increment Version button ( ) to add or save incremental versions of the FPS.

4.6.3 Copy a Fulfillment Plan

To copy a fulfillment plan, do the following:

1 From the Fulfillment Plans search page, select a Fulfillment Plan and click the **Copy** button ().

© Ericsson AB 2014
Commercial in confidence

2 Double-click the copied record to make the appropriate modifications to the copy.
3 When you have completed entering your information, click the **Save** button to save your changes and create your fulfillment plan.

4.6.4 Edit a Fulfillment Plan

To edit a fulfillment plan, do the following:

1 From the Fulfillment Plans search page, select a Fulfillment Plan and click the **Edit** button ( ).
2 Change the pertinent information.
3 When you have completed entering your information, click the **Save** button to save your changes to your fulfillment plan.

4.6.5 Delete a Fulfillment Plan

To delete a fulfillment plan, do the following:

1 From the Fulfillment Plans search page, select a Fulfillment Plan and click the **Delete** button ( ).
2 The selected Fulfillment plan will be deleted.

4.7 Find Subscriber Transition Strategy

The Subscriber Transition Strategy (STS) provides the plan for moving a client from his current to his desired state. A fulfillment plan specifies the STS, along with optional parameters.

Clicking **Plans** > **Finder Subscriber Transition Strategy** allows you to perform the following actions:

© Ericsson AB 2014
Commercial in confidence

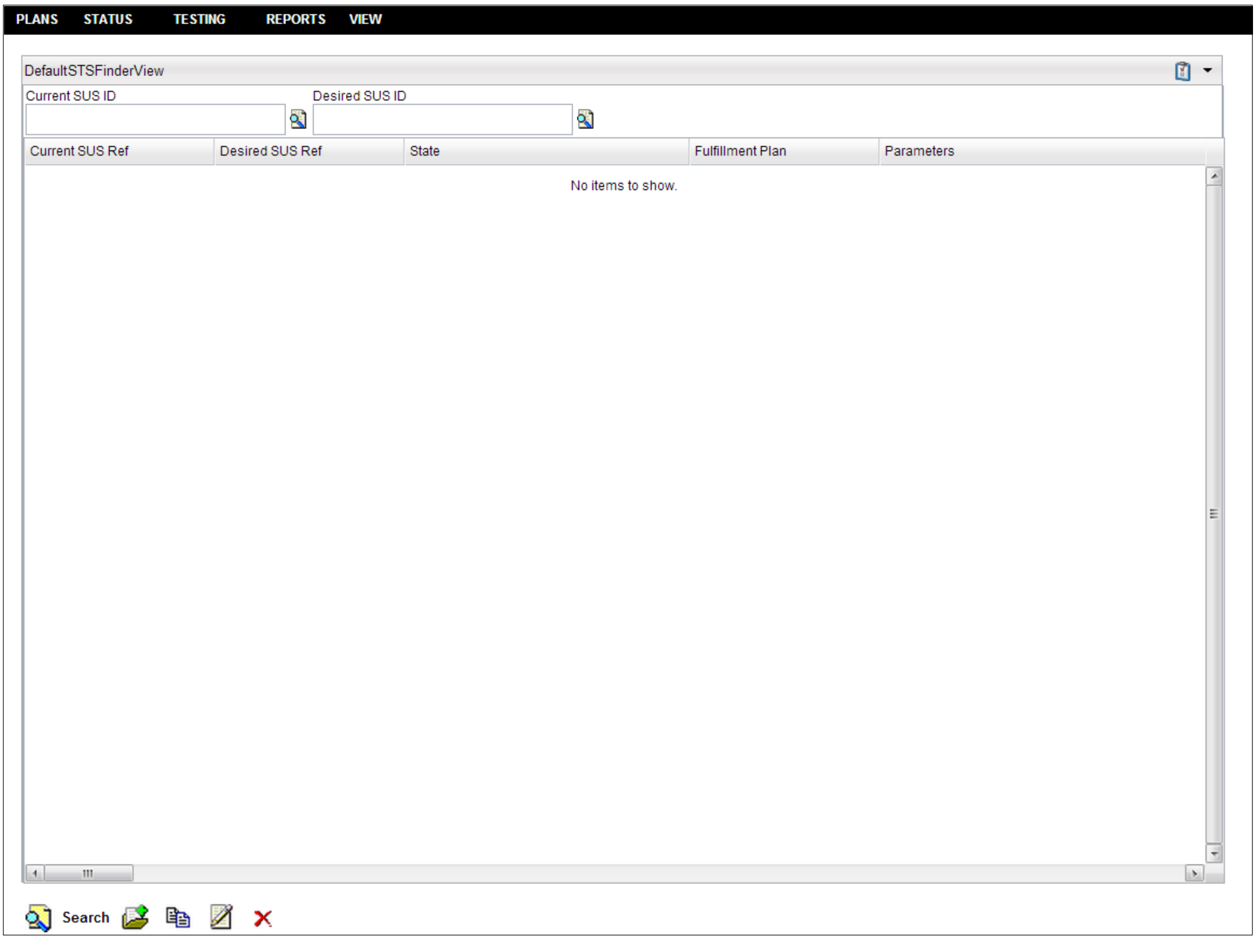


Figure 45 Find Subscriber Transition Strategies

- **Search** button: Display STS details
- **Add** button: Add a new STS
- **Copy** button: Make a copy of an existing STS
- **Edit** button: Change and update an existing STS
- **Delete** button: Delete an existing STS

4.7.1 Perform a Subscriber Transition Strategy Search

To perform a search, enter your search criteria in the fields and then click the **Search** button. The following screen displays your search results. The search results contain the following fields for each subscriber transition strategy:

- **Current SUS Ref**
- **Desired SUS Ref**
- **State**
- **Fulfillment Plan**
- **Parameters**

© Ericsson AB 2014
Commercial in confidence

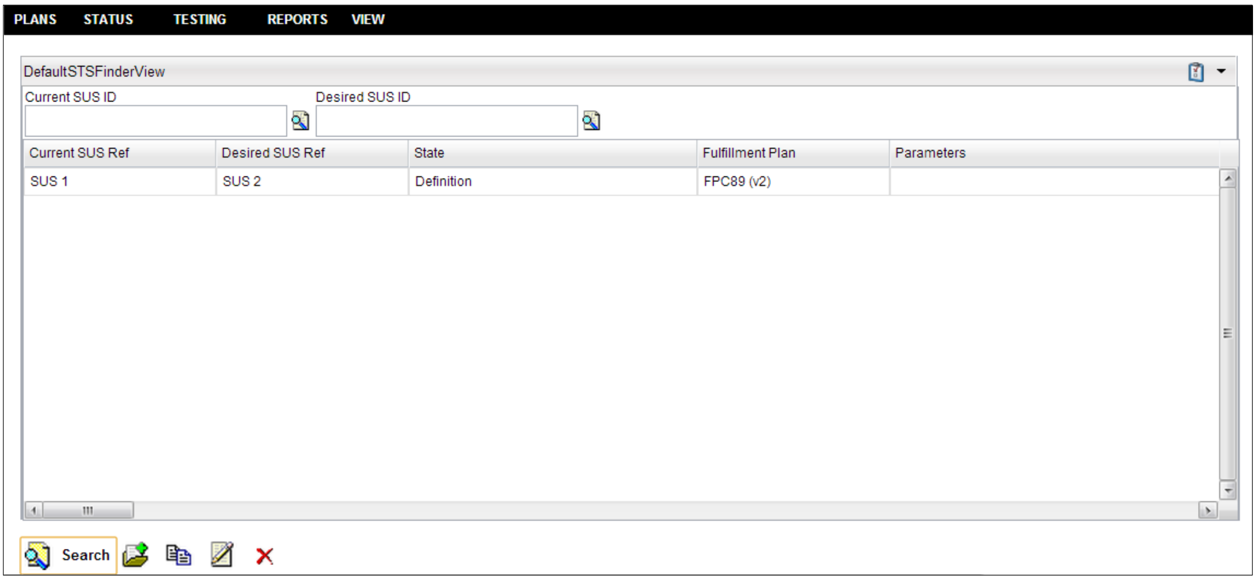


Figure 46 Subscriber Transition Strategies - search results

4.7.2 Add a New Subscriber Transition Strategy

To add a new STS, do the following:

1. From the Subscriber Transition Strategy search page, click the **Add** button.

2. On the Subscriber Transition Strategy page, select or enter information for your new STS. Each mandatory field has an asterisk (*) next to its label. The following fields are available:

    - **Current SUS REF**
    - **Desired SUS Ref**
    - **State**
    - **Subscriber Transition Strategy**
    - **Parameters**

© Ericsson AB 2014
Commercial in confidence

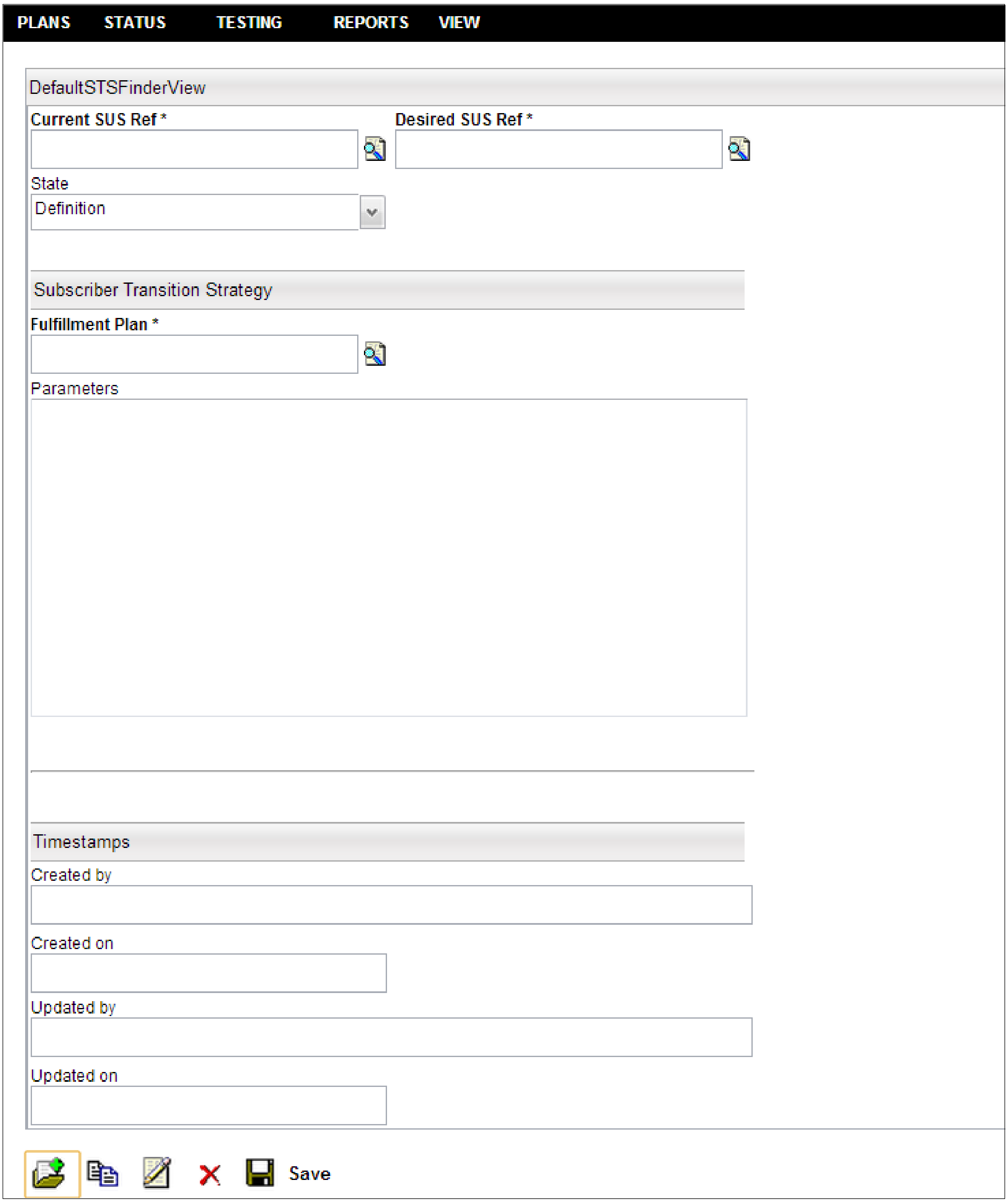


Figure 47 Add an STS -Enter Information

3 When you have completed entering your information, click the **Save** button to save your changes and create your STS.

© Ericsson AB 2014
Commercial in confidence

For the steps of copy, edit, and delete a Subscriber Transition Strategy, refer to the section 4.6.3, 4.6.4, and 4.6.5.

5 Status

The Status menu allows you to view the status of the following available options:

- Plan Instances
- Worklist
- Processes
- Messages in Error Status

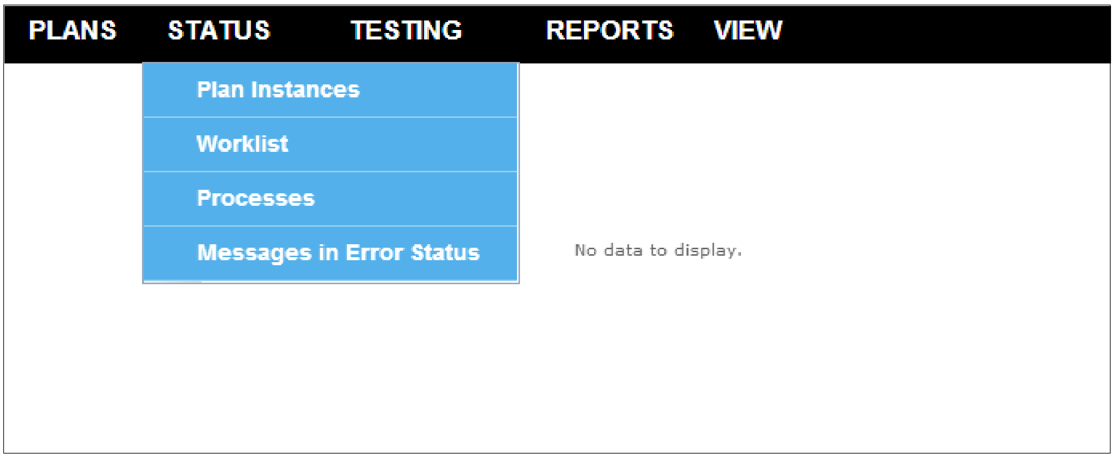


Figure 48 Status menu

5.1 Plan Instances

The Plan Instances section allows you to view the status of a given fulfillment plan by using the search feature and specifying search criteria, such as state, fulfillment plan code, order ID, and so on.

5.1.1 Perform a Plan Instances Search

To perform a search, enter your search criteria in the fields provided and then click the **Search** button. The following screen displays your search results.

© Ericsson AB 2014
Commercial in confidence

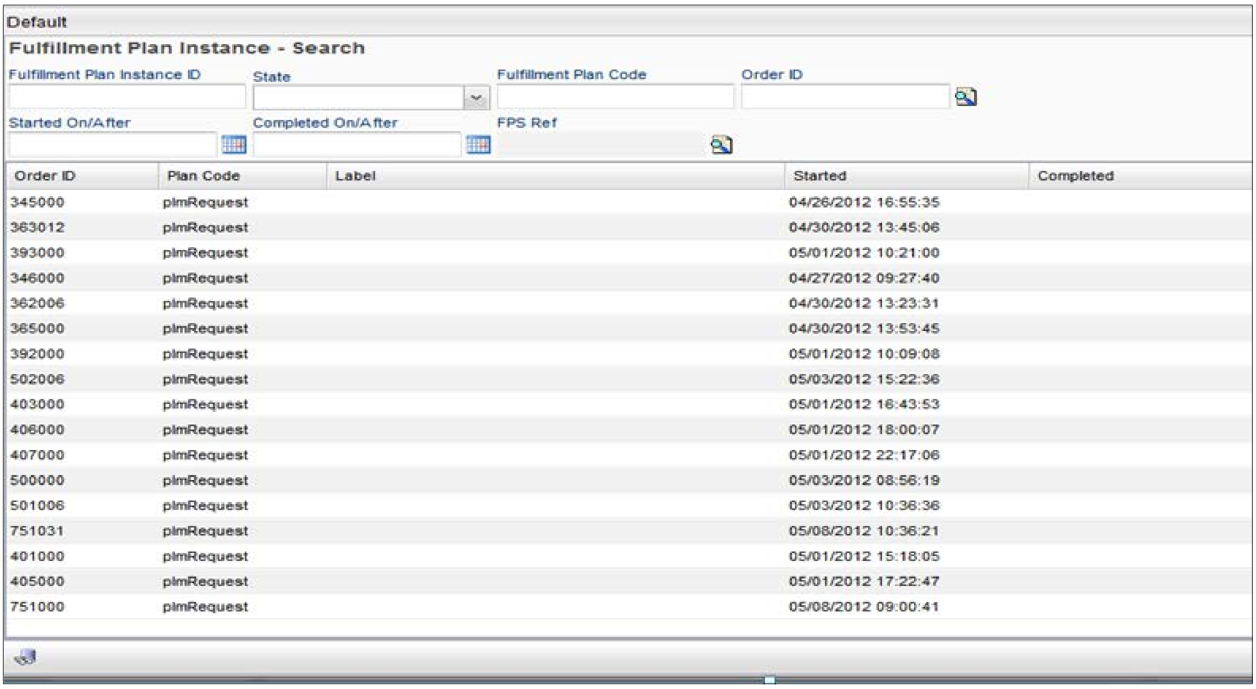


Figure 49 Plan Instances - search results

In the Plan Instances search results, you can download the results in different file formats by clicking the **Preferences** button ( ) and selecting from one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

5.2 Worklist

The Worklist section allows you to manage tasks and assign them to another user. You can also change a worklist, view the worklist's history, and more.

5.2.1 Perform a Worklist Search

To perform a search, enter your search criteria in the fields provided and then click the **Search** button. The following screen displays your search results.

© Ericsson AB 2014
Commercial in confidence

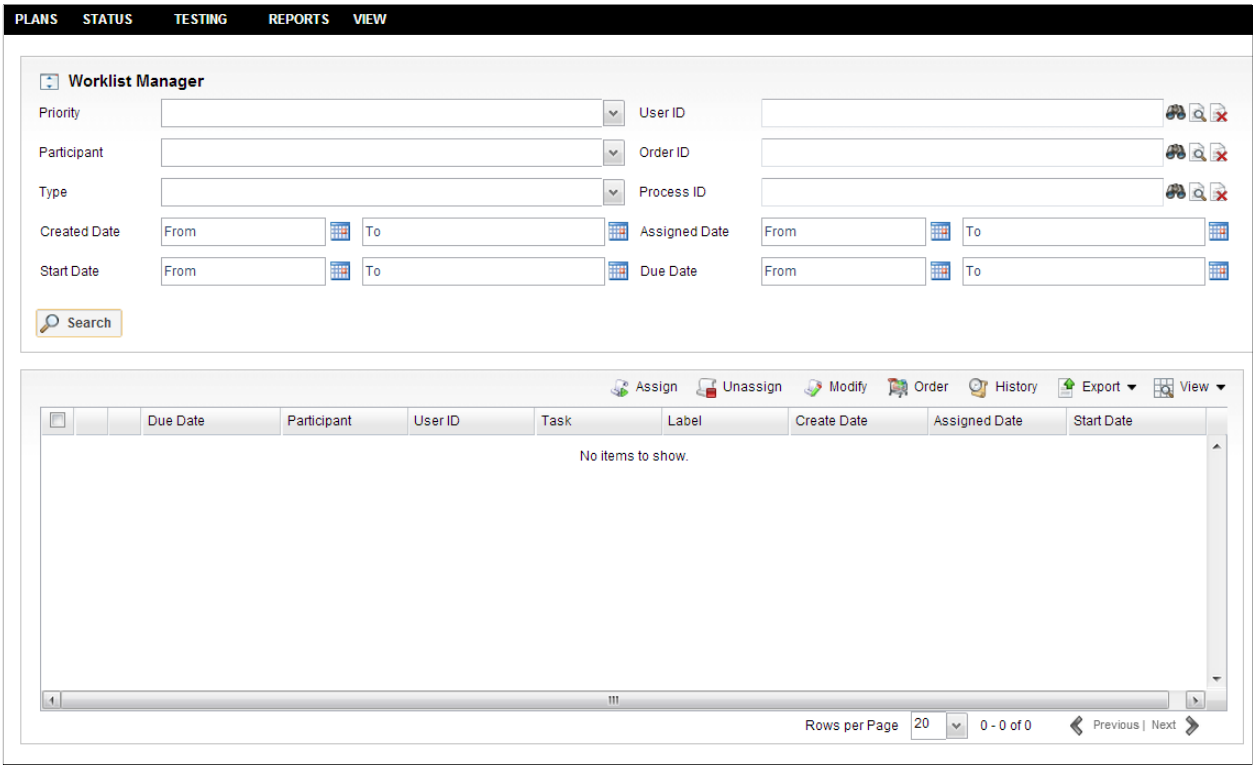


Figure 50 Worklist Manager - Search criteria

The search results contain the following fields for each task:

Field	Description
Due Date	Date and time when the worklist item is due.
Participant	Participant assigned to the worklist item.
User	ID of the user assigned to the worklist item.
Task	Description of the worklist item.
Details	Order details for the worklist item.
Created	Date and time when the worklist item was created.
Assigned	Date and time when the worklist item was assigned.
Started	Date and time when the worklist item was started.

Note: The first column (before **Due**) represents the priority of the task.

For more information on the Worklist Manager, see **Worklist Manager User guide**.

5.3 Processes

The Processes section allows you to search for process information and manage all processes.

© Ericsson AB 2014
Commercial in confidence

5.3.1 Perform a Processes Search

To perform a search, enter your search criteria in the fields provided and then click the **Search** button. The following screen displays your search results.

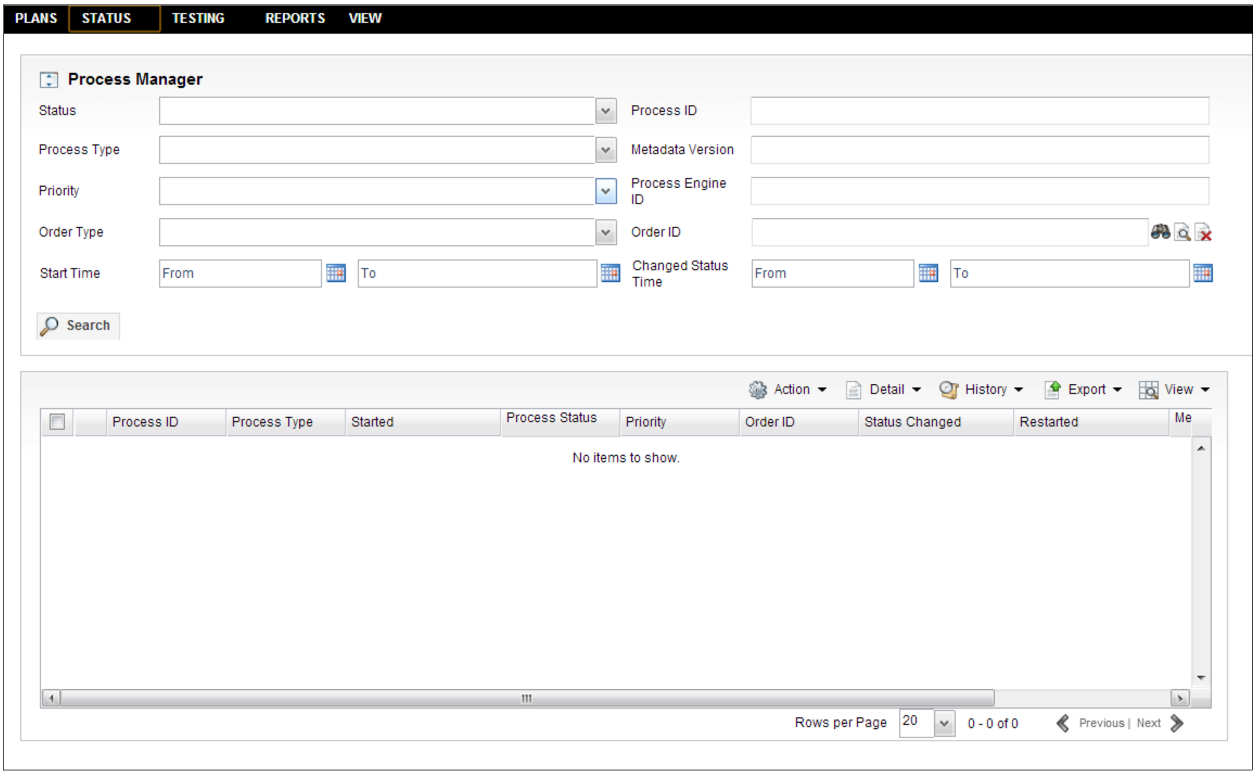
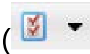


Figure 51 Process Manager - Search Results

You can download the results in different file formats by clicking the **Preferences** button () and selecting from one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

5.3.2 Action Menu

You can select a process from your search results, click the **Action** button and select one of the following actions to perform:

Field	Description
Suspend	Suspends the selected process.
Resume	Attempts to resume the selected process.
Terminate	Terminates the selected process.
Cancel	Cancels the selected process.
Resume Stale	Resumes a stale-dated process.

© Ericsson AB 2014
Commercial in confidence

5.3.3 Detail Menu

You can select a process from your search results, click the **Detail** button and select one of the following actions to perform:

Field	Description
Event Log	Launches an Event Log dialog, which displays a list of messages associated with the selected process.
Milestones	Launches a Milestones dialog, which displays a list of milestones associated with the selected process.
Document	Launches a Process Document dialog displaying the Document associated with the selected process.
Order	Launches a dialog displaying the Order associated with the selected process.
Worklist	Launches a Worklist Manager dialog (refer to section Worklist Manager), which displays a list of worklist items associated with the selected process.
Child Processes	Launches a Process Manager dialog, which displays a list of processes spawned by the selected process.
Activities	Launches an Activity Finder dialog, which displays a list of activities associated with the selected process.

5.3.4 History Menu

You can select a process from your search results, click the **History** button and select one of the following actions to perform:

Field	Description
Activities	Launches an Activity Archive dialog, which displays a list of completed activities associated with the selected process.
Worklist	Launches a **Worklist History** dialog, which displays a list of completed worklist items associated with the selected process.

5.4 Messages in Error Status

The Messages in Error Status section allows you to search for errors using search criteria such as Order ID, errors that occurred after a given date, and so on.

© Ericsson AB 2014
Commercial in confidence

5.4.1 Perform an Error Messages Search

To perform a search, enter your search criteria in the fields provided and then click the **Search** button. The following screen displays your search results.

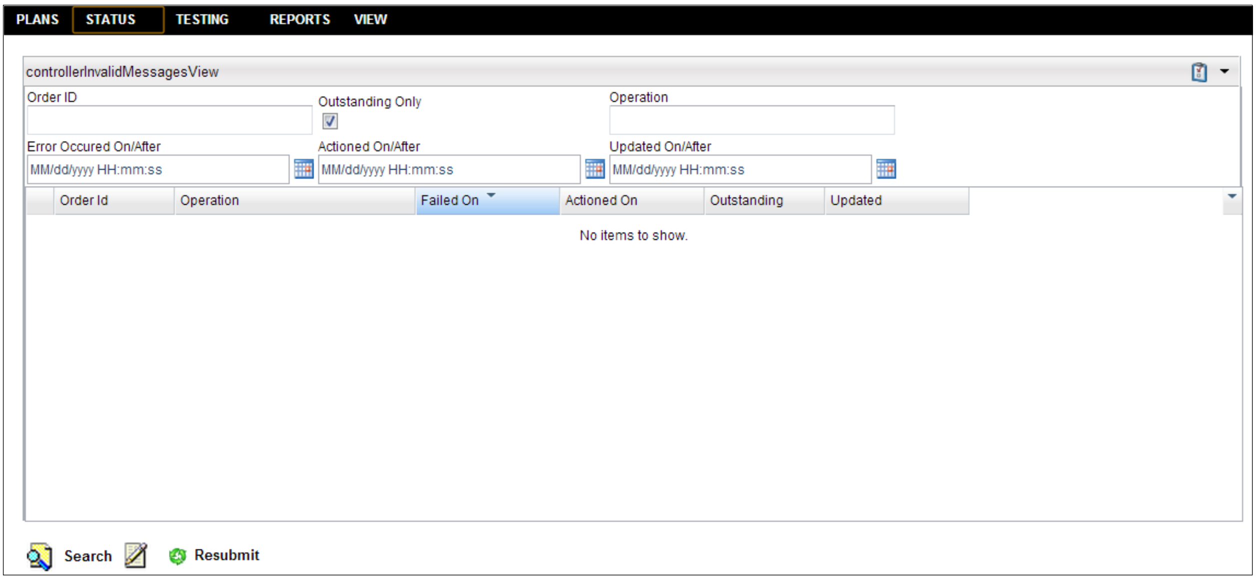
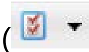


Figure 52 Controller Invalid Messages - search results

In the Controller Invalid Messages search results, you can download the results in different file formats by clicking the **Preferences** button () and selecting from one of these options:

- **Download as XLS**
- **Download as CSV**
- **Download as XML**

5.4.2 Resubmit an Error

You can resubmit an error for reprocessing by selecting the error from your search results, and then clicking the **Resubmit** button.

6 Testing

The Testing menu allows you to perform testing on a CFS.

© Ericsson AB 2014
Commercial in confidence

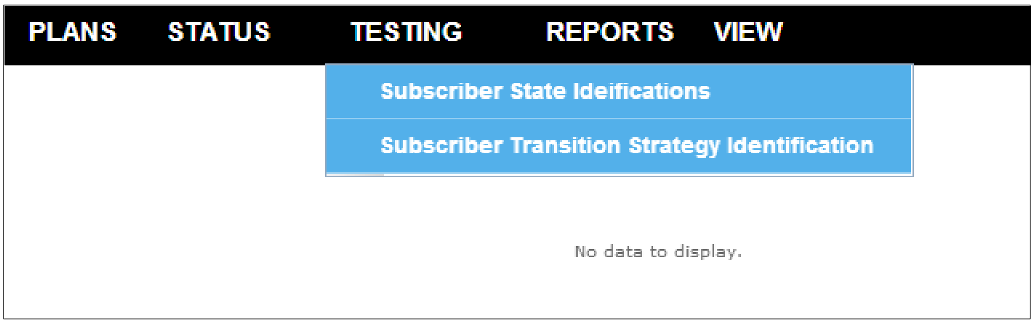


Figure 53 Testing section

The Testing menu contains the following options:

- Subscriber State Identifications
- Subscriber Transition Strategy Identification

6.1 Subscriber State Identifications

In Search mode, information about each CFS ID appears along with its state. This option allows you to delete any item from the window, add a new item, or change an existing item.

© Ericsson AB 2014
Commercial in confidence

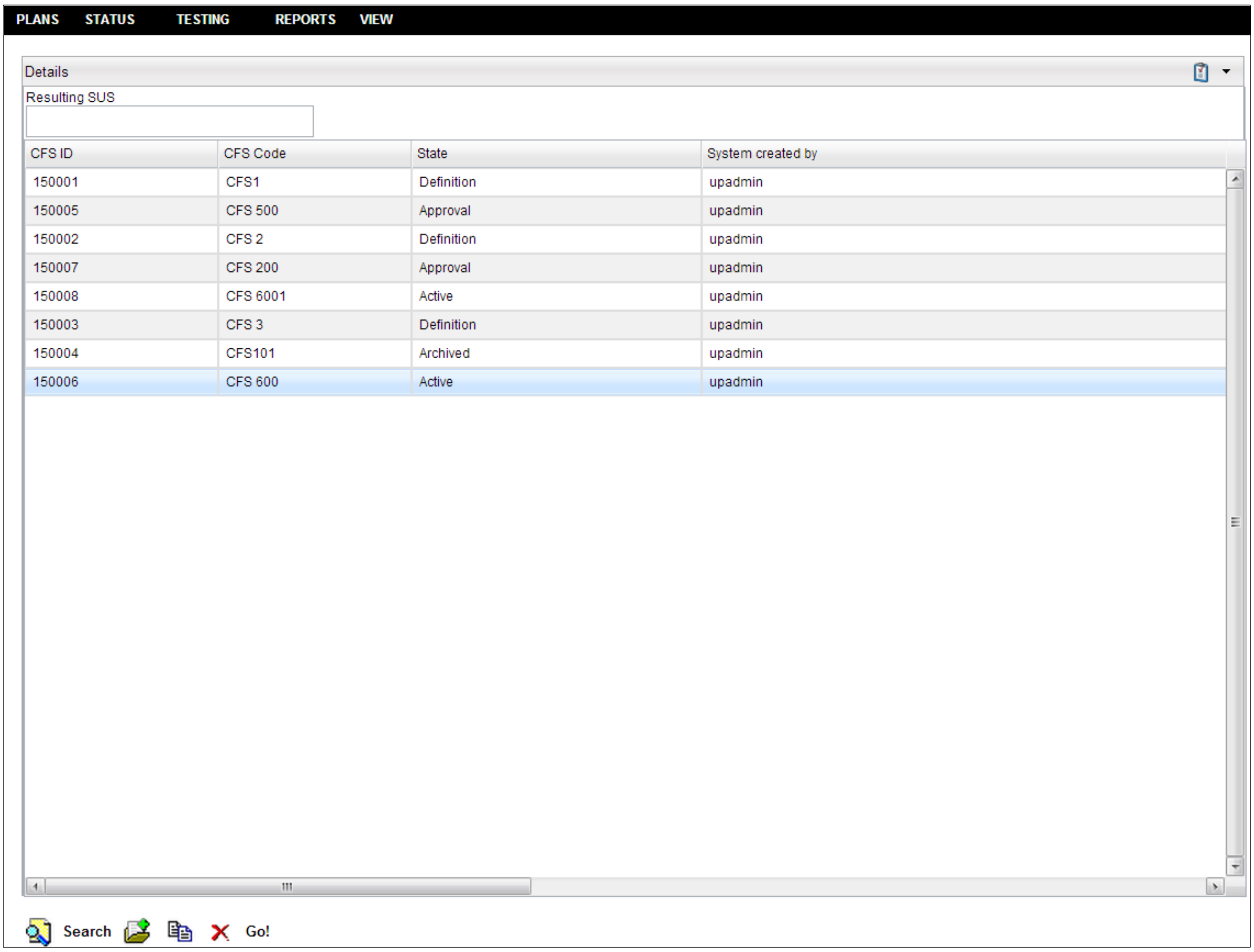


Figure 54 Subscriber State Identifications - Search Results

Selecting a CFS ID in your search results and then clicking the **Go** button allows you to start testing.

6.2 Subscriber Transition Strategy Identification

In Search mode, you can display details for a given STS. Specify either the **Current SUS ID** or **Desired SUS ID** as search criteria are, and then click the **Search** button to view your search results.

© Ericsson AB 2014
Commercial in confidence

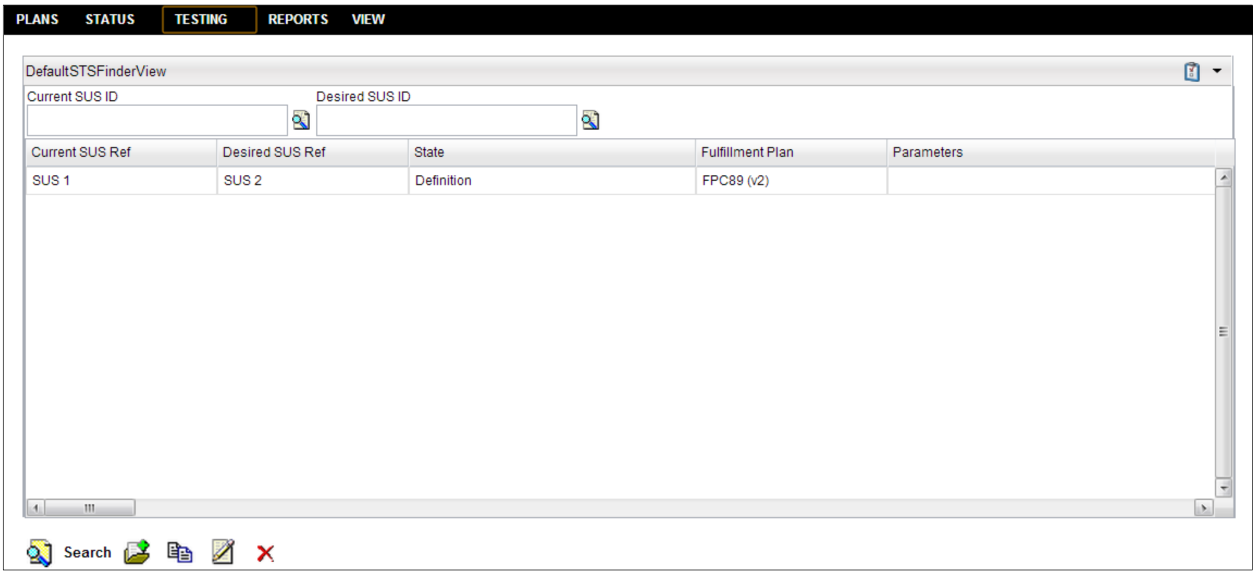


Figure 55 Search to display details for a given STS

7 Reports

The **Reports** menu contains the following options:

- RP01 Completed by Participant by Month
- RP01 Completed by Fulfillment Plan by Month

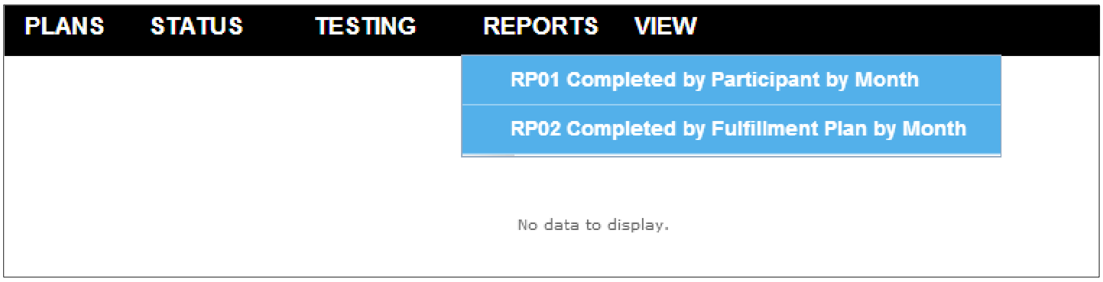


Figure 56 Reports Menu

You can generate the reports completed by participant and fulfillment plans by following these steps:

1. Click **Reports** > **RP01** Completed by Participant by Month menu.
2. The **Detailed Result** page appears; select the date from **Period Ending** field or you can also select a participant from the drop-down list of **Participants** field.
3. Click the **Search** button to get the results.

© Ericsson AB 2014
Commercial in confidence

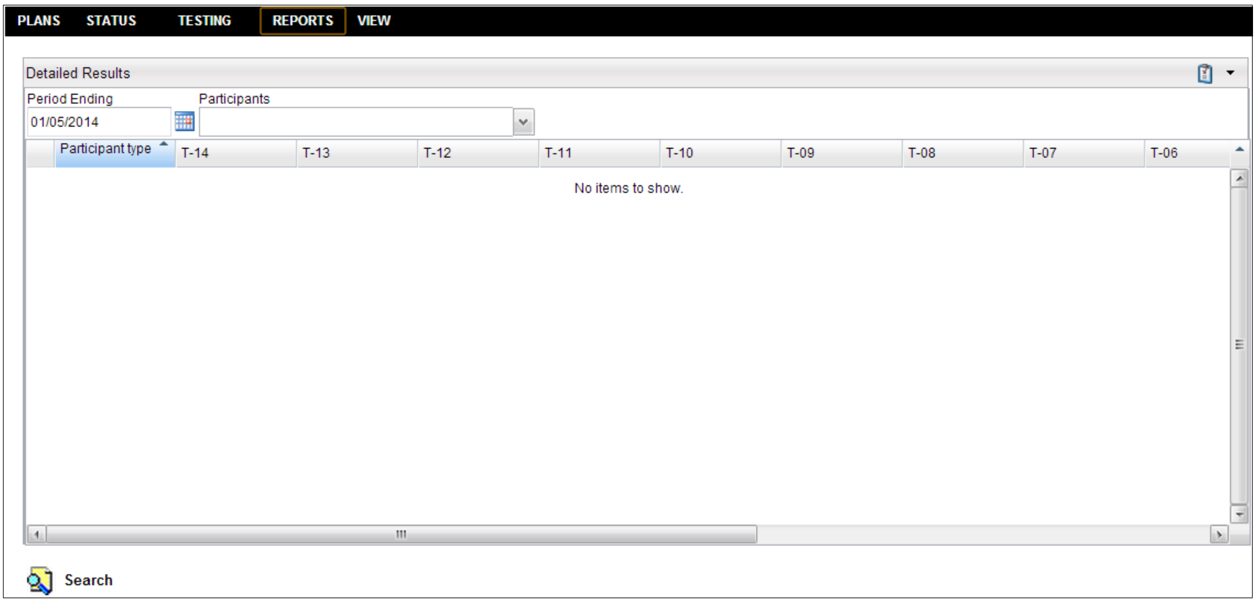


Figure 57 Reports Search

8 View

The **View** menu contains the following action:

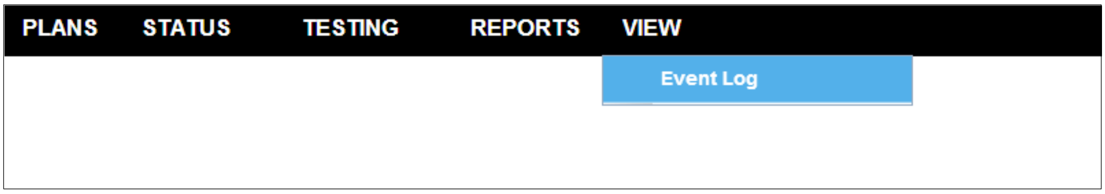


Figure 58 View Menu

8.1 Event Log

The Event Log report displays a list of messages logged by the application. To perform a search, enter your search criteria in the fields provided and then click the **Search** button. The following screen displays your search results. To access the event log, complete these steps:

1. From the menu bar, click **View** > **Event Log** to launch the Event Log page.

© Ericsson AB 2014
Commercial in confidence

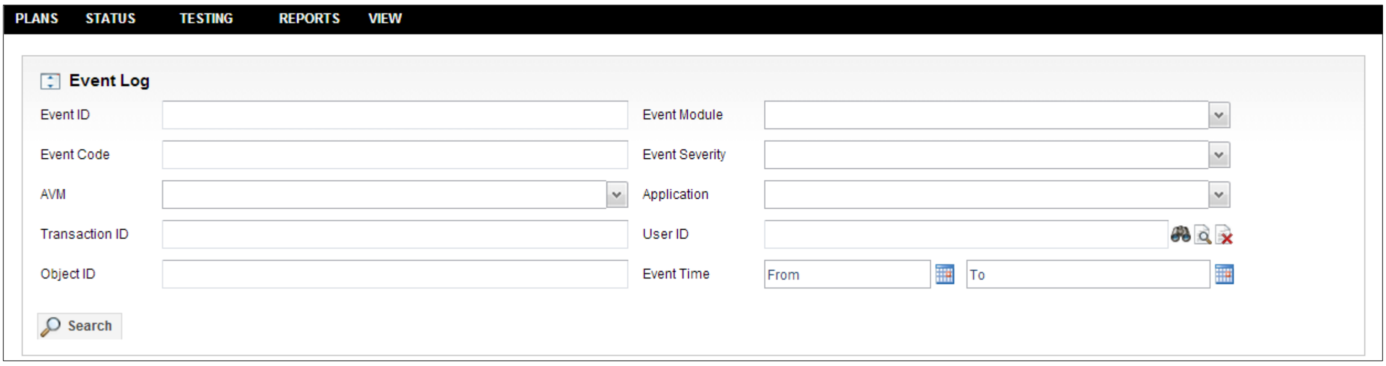


Figure 59 Event Log

2 On the Event Log page, specify your search criteria. The following fields are available:

Field	Description
Event ID	This field contains the numeric event message's identifier.
Event Severity	This field denotes the event's level of importance. Click the field's drop-down menu and select from one of the following event severity options: • **Debug** • **Information** • **Warning** • **Error** • **Fatal Error**
Event Module	This field indicates the message's source. Click the field's drop-down menu and select the event module that you want.
Event Time	This field allows you to specify the time and date when the event message was logged. There are two fields that you can specify: • **From** field Click the **Calendar** icon and select the date from which you want to search for events. • **To** field Click the **Calendar** icon and select the date to which you want to search for events.
AVM ID	This field denotes the AVM ID, which is a combination of your host ID and the Velocity Studio build version that you are using. Click this field's drop-down menu and select the identifier from the list.
Node	This field represents the node set in the configuration application. Click the field's drop-down menu and select the node identifier from the list.
User ID	This field contains the ID of the user who received the message. You can click the following buttons:

© Ericsson AB 2014
Commercial in confidence

Field	Description
	• **Finder** button, to look up a user ID in a finder • **Details** button, to view details of the event in a dialog • **Clear** button, to clear any text that appears in this field
Transaction ID	This field contains the ID that is attached to a grouping for the same request type or a process activity for a process engine.
Object ID	This field denotes the object code that identifies the message type.

3 When you have finished entering your search criteria, click the **Search** button to view your search results.

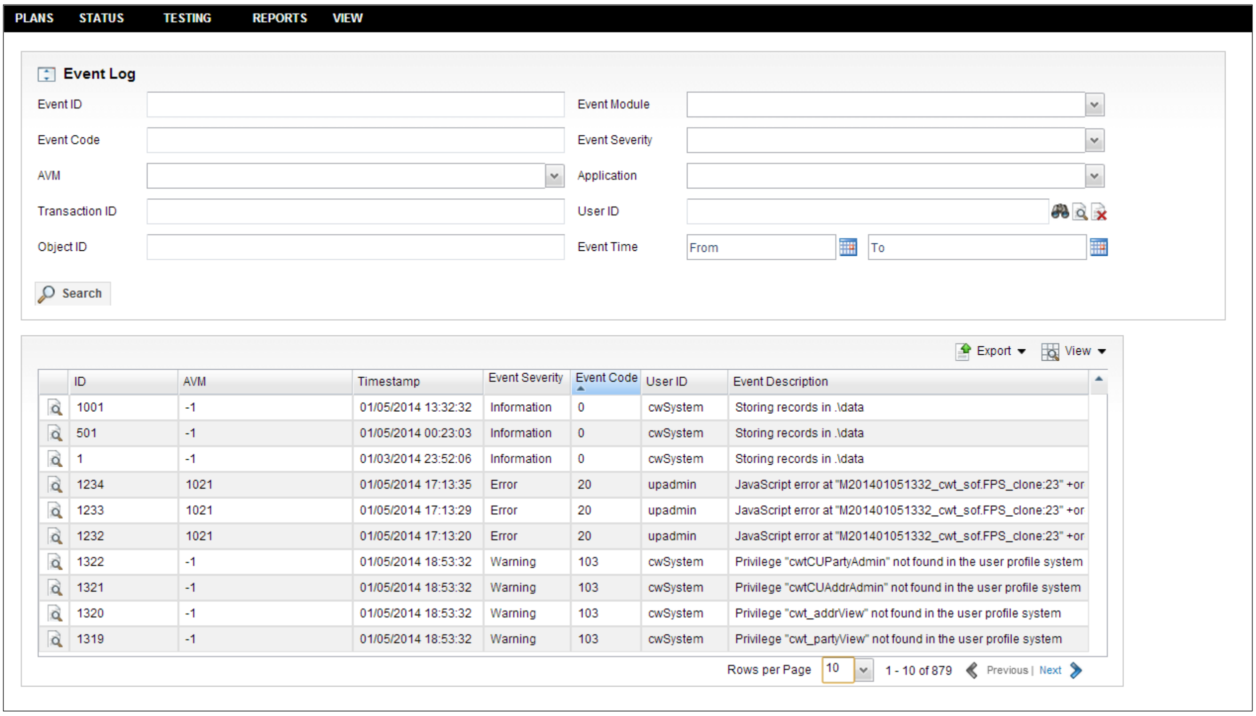


Figure 60 Event Log - Search Results

4 The Event Log search results contain the following fields:

Field	Description
Event ID	This field contains the numeric event message's identifier.
AVM ID	This field denotes the AVM ID, which is a combination of your host ID and the Velocity Studio build version that you are using. Click this field's drop-down menu and select the identifier from the list.
Node	This field represents the node set in the configuration application. Click the field's drop-down menu and select the node identifier from the list.

© Ericsson AB 2014
Commercial in confidence

Field	Description
Timestamp	This field contains the time and date when the message was logged.
Event Severity	This field denotes the event's level of importance.
Event Code	This field represents the internal code identifying the message type.
User ID	This field denotes the ID of the user who received the message.
Event Description	This field contains a description of the message.

5 To view and event's specific details, double-click the **Event ID** that you want to view from the search results. The Event Log Details page launches, which includes details of a message's stack trace and more.

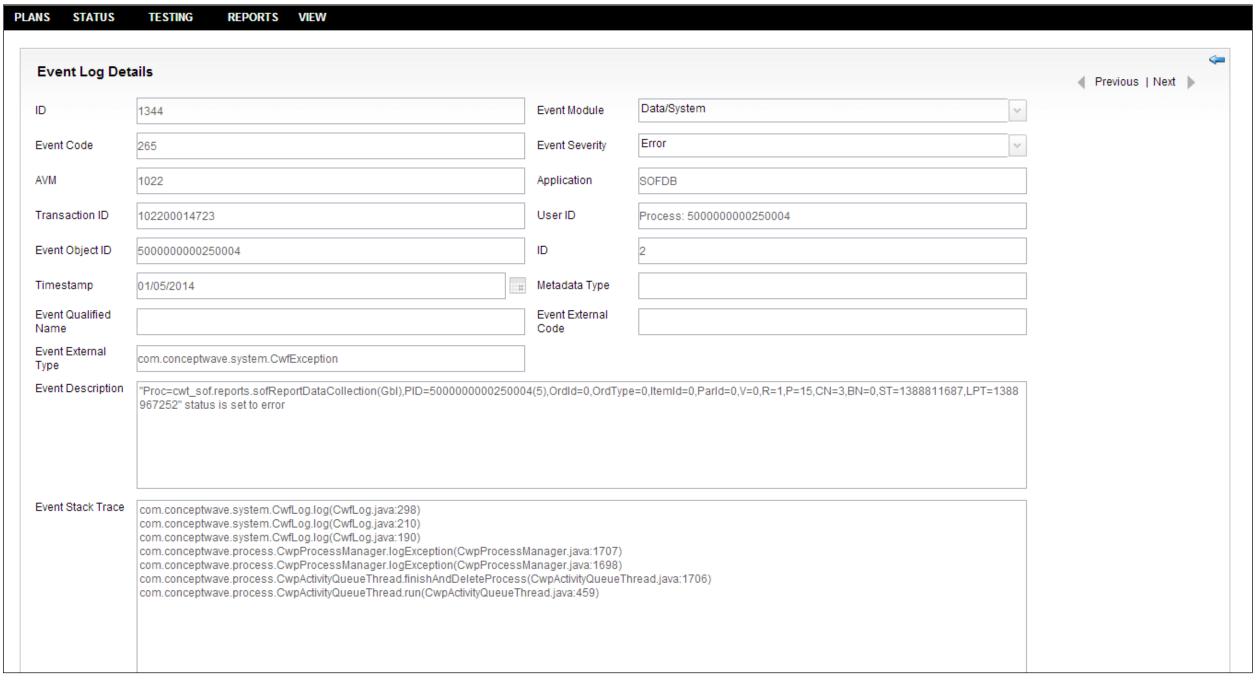


Figure 61 Event Details

9 Recommendations for Metadata Migration

If the OF scripts were copied locally instead of invoking directly from previous releases, the changes in OF script must be carried over manually in the local metadata scripts. The following metadata adjustments are required to convert previous release of OF to version 6.x:

© Ericsson AB 2014
Commercial in confidence

1 A new variable `configName` has been added for the `cwt_sof.startFPIRequest` data structure. If your metadata overrides this data structure to add this field locally, remove this variable to avoid any metadata validation error.

2 The `cwt_sof.util_getDefaultCalendar` global script and `cwt_sof.defaultCalendarFinder` SQL finder are obsolete. The `defaultCalendarName` is not used with the Calendar object's methods. You can use `null` instead that automatically assumes the default calendar. You can search for the usage of `cwt_sof.util_getDefaultCalendar` and `cwt_sof.defaultCalendarFinder` in your metadata then go over each script and replace Calendar method to use null as a calendar name instead of `defaultCalendarName`.

3 The `TAI.FPSTASRef` variable has been removed and all scripts using this field are replaced with computation of this field through finder. The `cwt_sof.controller_updateFPI` script uses this variable directly; you must update the metadata manually to avoid any exceptions.

4 The following methods are changed due to the new Worklist implementation that operates worklist tasks in terms of data structure instead of documents:

- `processAction_updateWorkitem`
- `workItem_distribution`

By default, the workItem parameter is data structure. If your application is configured to run in **5.x Worklist Document Mode**, it will be a document. You must either re-implement the script (recommended) or run in **Worklist Document Mode**.

5 If client metadata overrides `processAction_createTask` and `processAction_createAlert`, the generation of tasks and alerts using old code will fail. OF is using new worklist implementation that relies on worklist data structure and new implementation of methods.

6 Some scripts have been modified to stop using non-existing workItem fields:

- The `cwt_sof.processAction_createAlert` script or `cwt_sof.processAction_createTask` script does not invoke mapping from TAI to workitem (ADHOC, RPOXY, ALERT tags). These maps do not exist in OF. If you need these maps, invoke them in the handler for `SOF_WORKITEM_UPDATE` event.
- The `cwt_sof.processAction_createAlert` script no longer sets workItem's `participantMessage` as this field does not exist in default workItem. If needed, add this logic to the handler for `SOF_WORKITEM_UPDATE` event.
- The `cwt_sof.worklistAction_do` script no longer handles workItems with `proxyParticipant` as this field does not exist in

© Ericsson AB 2014
Commercial in confidence

default workItem. If needed, add this logic to the handler for `SOF_WORKITEM_ACTION` event.

© Ericsson AB 2014
Commercial in confidence