

# Ericsson Order Care

Realize Higher Consistency for Faster Time-to-Revenue

---

## Unified Workstation Configuration Guide



© 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

<b>1</b>	<b>Introduction.....</b>	<b>4</b>
1.1	Purpose and Scope .....	4
1.2	Reader's Guideline .....	4
1.3	Software Terms of Use .....	4
<b>2</b>	<b>UWS Overview .....</b>	<b>5</b>
2.1	UWS Features .....	5
<b>3</b>	<b>Quick Start.....</b>	<b>5</b>
<b>4</b>	<b>Installation and Setup of UWS .....</b>	<b>6</b>
4.1	Set up Velocity Studio and Database Schema .....	6
4.2	Set Up the System Configuration Application.....	8
4.3	Add JAR files .....	9
4.4	Assign the Privileges.....	11
<b>5</b>	<b>Add Sample Schemas.....</b>	<b>13</b>
5.1	Import the Configuration Variables and User Profiles .....	13
5.2	Import Code Tables .....	13
5.3	Import Catalog Data.....	13
5.4	Access UWS with Data .....	15
<b>6</b>	<b>Block and Unblock Subscription .....</b>	<b>16</b>
<b>7</b>	<b>Reference List .....</b>	<b>16</b>
<b>8</b>	<b>Trademarks .....</b>	<b>16</b>
<b>9</b>	<b>Disclaimer.....</b>	<b>17</b>



# 1 Introduction

This document provides instructions on how to configure the Unified Workstation (UWS).

## 1.1 Purpose and Scope

The purpose of this document is to provide information on how to configure and use UWS. To perform the tasks in this document requires that you have metadata development experience.

## 1.2 Reader's Guideline

This section describes the version syntax covered in this document and any additional, required information.

Commands that you enter on the command line appear in courier font, such as the following:

```
svnadmin dump C:\SVN\myProject > C:\backupFolder\myProject.bak
```

Document names and sections within documentation are set in italics, such as the following:

For more information on making a copy of your project metadata, see the *Velocity Studio User Guide*, under *Velocity Studio User Interface > Common Actions Outside Velocity Studio*.

**Note:** To navigate the documentation, an arrow appears (>), which separates each hyperlink to be clicked.

## 1.3 Software Terms of Use

The Unified Workstation (UWS) can be used by an authorized user to perform the functions outline in this document and summarized in the software features section of this document.

### **Legal Activity**

You will not use the product to engage in or allow others to engage in any illegal activity. You will not use the product for any purpose that is unlawful or prohibited by these Terms of Use.

### **Unauthorized Customization or Reverse Engineer**



You may not use the product to obtain information necessary for you to design, develop or update unauthorized software. You may not reverse engineer, decompile, disassemble, derive the source code of, modify, or create derivative works from the Product.

### **Third party**

You will not engage in use of the product that will interfere with or damage the operation of the services of third parties by overburdening or disabling network resources through automated queries, excessive usage or similar conduct. You may not authorize any third party to use the product on your behalf without a separate written agreement with Ericsson.

## 2 UWS Overview

Unified Workstation (UWS) is an accelerator module that provides many out-of-the-box functionalities, but customization and integration is required before it can be deployed in production. Once properly deployed, UWS can be used by customer service representatives (CSRs) to provide information about the customer's product and services and to assist the customer with ordering new services. This module allows customers to access their account information through a Web browser. It can be integrated with the Ericsson Catalog Manager (ECM) application that allows you to define, introduce, manage and retire product offerings. The active items in the product catalog can be ordered through UWS.

### 2.1 UWS Features

The UWS module provides a central repository of customer information. Once UWS is deployed properly, it enables the customer service representative to:

- Search customer accounts
- Update a customer profile
- Create, change and track orders
- Enter and edit account information
- View account and payment status
- Disconnect and cancel services
- View and update services
- Review billing and payment information
- Process a top-up payment or a one-time payment
- View customer interactions information

## 3 Quick Start

The following are the quick steps to install the UWS module:



1. Install Velocity Studio and follow the directions from the Velocity Studio's Installer User Guide to install Velocity Studio, initialize the database, and configure the System Configuration application.
2. Create a project in Velocity Studio and set the internal name of the project.
3. Add the [UWS library files](#) to Velocity Studio.
4. Start the runtime and update the logical connection in the System Configuration application.
5. Upgrade the database and run the associated SQL file.
6. Configure new logical connections in the System Configuration application.
7. Assign the privileges required to run the UWS module in the User Profile Management application.
8. Logout and log back in from the runtime.
9. Double-click the Unified Workstation application's icon.

## 4 Installation and Setup of UWS

This section provides the details on how to install and configure UWS module. To use UWS, the ECM must be installed in a development environment.

### 4.1 Set up Velocity Studio and Database Schema

1. Install Velocity Studio as outlined in the *Installer User Guide > Standard Install*.
2. Create a new schema in your database. Refer to the *Installer User Guide > Standard Install > Database Initialization*.
3. Run the `<installation_folder>\DDL\CW.sql` file. Use your newly created database schema to run this script. Update the `CW.sql` with the new user name.
4. Open the `<installation_folder>\designer\env\startDesigner.cmd` file to start Velocity Studio.
5. Create a Project in Velocity Studio.
  - a Click **File > New > New Project** from the menu bar.
  - b From the Select an empty directory dialog, specify the folder where you want to save your new project.
  - c Click the root metadata node, by default appears as AVM Metadata. On the General properties of this node, enter project's internal name in the **Internal Name** field.
6. Click **Database > Connect** from the menu bar to connect to your newly created database schema.
7. From the Database Login dialog, click the **New** button to configure the database connection settings.
8. The Connection Properties dialog appears; enter the name for the connection and the name of your database schema user in the **Name** and **User** fields, respectively.

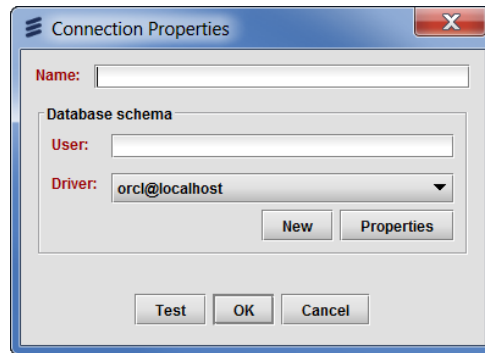


Figure 1 Connection Properties Dialog

9. Click the **New** button.
10. The Driver Properties dialog appears; click the **Driver type** field's drop-down menu and select **Oracle thin**. Proceed to enter the **Host**, **Port**, **Connection Type**, and **Service** information.

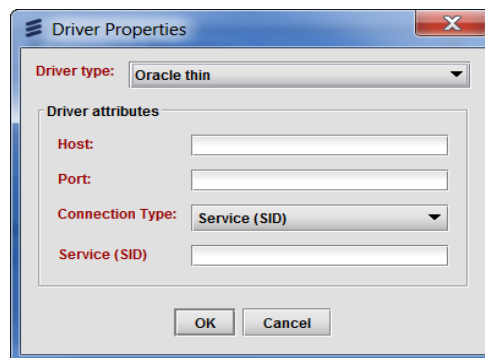


Figure 2 Driver Properties Dialog

11. Click the **OK** button.
12. The Connection Properties dialog reappears. You can click the **Test** button and then enter the password to test the connection.
13. Click the **OK** button to return to the Database Login dialog.
14. Enter the value in the **Password** field and click the **OK** button to connect.
15. Click **Runtime > Run** from the menu bar to run the framework.
16. The Select Application dialog appears; click the **New** button.

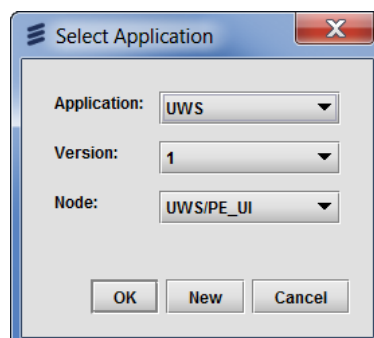


Figure 3 Select Application Dialog



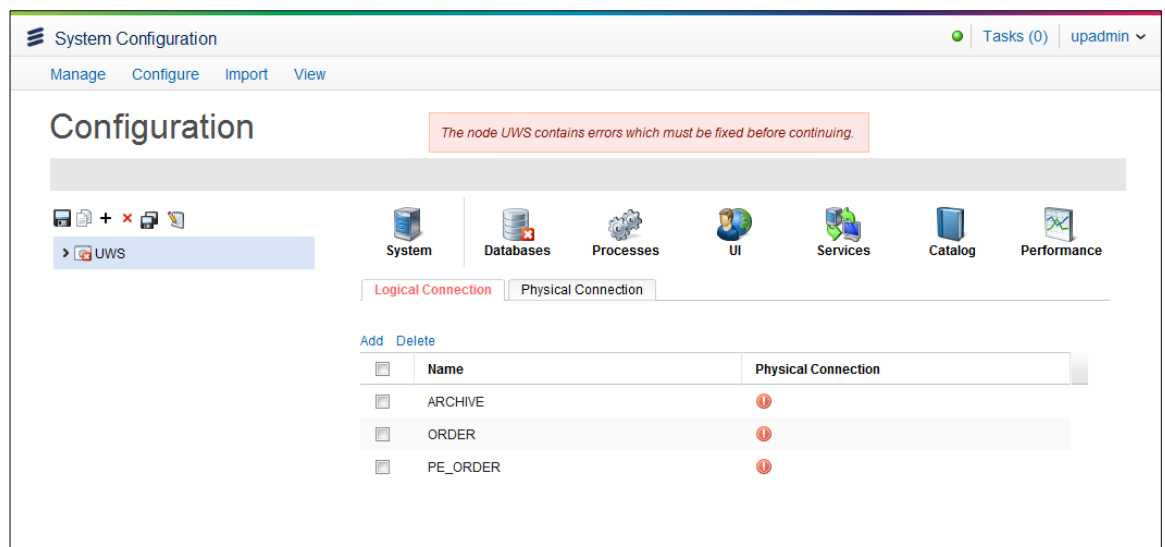
17. The Add dialog appears; enter the value for the **Version** and **Description** field.
18. Click the **OK** button from the **Add** and **Select Application** dialogs.

**Note:** The Velocity Studio runs in Configuration mode until the System Configuration application is properly set up, and the application metadata has been run.

## 4.2 Set Up the System Configuration Application

The following are the steps to set up the system configuration application.

1. In your Web browser, access the System Configuration application by entering `http://localhost:8080/cwf/config` as the URL.
2. Enter **upadmin** as both your Username and Password, and then press the **Enter** key to login. The main screen of system configuration application displays:



*Figure 4 Main Screen of System Configuration Application*

3. Select the main node (for example, UWS) from the node menu section, and then click the **Database** tab.
4. The **Logical Connection** tab displays the logical connections to the database, which are responsible for enabling the AVM to send database commands to the database, to carry out different functionalities.
5. Clicking **Databases > Physical Connection** displays the physical connections to the database, which are responsible for defining database connection parameters to be used by logical connections. Complete these steps to add a physical connection:
  - a. From the Physical Connection page, click the **Add** button.
  - b. The New Physical Connection dialog appears. Enter your database credentials.





- c. To test your connection settings, click the **Test** button. If your connection settings are properly set up, a *Successful Connection* confirmation message appears.
- d. Click the **Apply** button. A message appears, indicating that you have successfully updated your Oracle thin connection.
- e. Click the **Close** button.

**Note:** The database attributes in the System Configuration application need to match the database attributes in the Velocity Studio. For more information, refer to the *System Configuration User Guide*.

6. Click the Logical Connection tab to associate your logical connections to the physical connection you have just created, double-click each of the following logical connections and select your newly created physical connection from the drop-down list:

- ARCHIVE
- ORDER
- PE\_ORDER

7. Click the **Save** button to save your configuration settings, and exit the system configuration application.

**Note:** You can select the **Active configuration** checkbox for **PE**, **PE\_UI**, or **UI** node.

## 4.3 Add JAR files

Go back to the Velocity studio, and follow these steps to continue the configuration on the Velocity Studio side.

1. Click **Runtime > Stop** from the menu bar, to stop the runtime in Velocity Studio.
2. Click the root metadata icon (for example, AVM Metadata) in the left navigation menu, and then click the **Library** tab.
3. Click the Add button (⊕) to launch the Select an template JAR dialog.

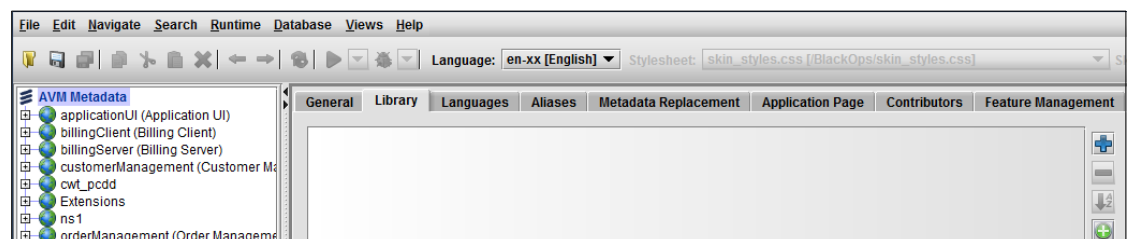


Figure 5 Add Library Files

4. Add the following UWS library files. Select the required and recursive JAR file for UWS module from <installation\_folder>\modules folder. The UWS library or JAR files contains the metadata that enables UWS to run.



Module	Required JAR Files	Recursive JAR Files
<b>Unified Workstation</b>	<ul style="list-style-type: none"> <li>• uws.jar</li> <li>• plugin_uws_sc.jar</li> </ul>	<ul style="list-style-type: none"> <li>• address.jar</li> <li>• api_common.jar</li> <li>• billing.jar</li> <li>• catalog.jar</li> <li>• catalogClient.jar</li> <li>• customer.jar</li> <li>• cwlInitialization.jar</li> <li>• cwl_address.jar</li> <li>• cwl_customer.jar</li> <li>• cwl_party.jar</li> <li>• cwl_report.jar</li> <li>• cwl_service_registry.jar</li> <li>• data_dictionary.jar</li> <li>• data_order.jar</li> <li>• notification.jar</li> <li>• order_negotiations.jar</li> <li>• order_negotiations_lib.jar</li> <li>• party.jar</li> <li>• plugin_uws_sc.jar</li> <li>• report.jar</li> <li>• service_registry.jar</li> <li>• serviceOrchestrationFramework.jar</li> <li>• SIDCommon.jar</li> <li>• wizard.jar</li> </ul>

**Note:** Make sure that you do not add the following JAR files:

- customer\_information\_management.jar
- plugin\_on\_cim.jar

8. A Copy File dialog appears; select Yes or No in the dialog. If Yes is selected, the JAR files are copied locally to your *<installation\_folder>\templates* folder. If No is selected, file path is added to your template folder.
9. Once the files are added, save the project metadata.
10. Reload or open the project for the library files to take effect.

If you are also running ECM simultaneously, you will also need to add the appropriate library files from the *<installation\_folder>\modules* folders. The following is a list of the JAR files for ECM:

Module	Required JAR Files	Recursive JAR Files
<b>Ericsson Catalog Manager</b>	ecm.jar	<ul style="list-style-type: none"> <li>• address.jar</li> <li>• api_common.jar</li> <li>• billing.jar</li> <li>• catalog.jar</li> </ul>



Module	Required JAR Files	Recursive JAR Files
		<ul style="list-style-type: none"> <li>• catalogClient.jar</li> <li>• customer.jar</li> <li>• cwl_pscm.jar</li> <li>• cwl_report.jar</li> <li>• cws_pscm.jar</li> <li>• data_dictionary.jar</li> <li>• notification.jar</li> <li>• party.jar</li> <li>• pscm.jar</li> <li>• report.jar</li> <li>• serviceOrchestrationFramework.jar</li> <li>• SIDCommon.jar</li> </ul>

11. Click the **Save** button to save your change.
12. Click **Runtime > Run** from the menu bar to start the runtime. The Velocity Studio runs in configuration mode. New logical connections are available in the System Configuration application.
13. Follow the steps described in the previous section of this document to login to the System Configuration application.
14. Associate the new logical connections to the physical connection.
15. Click the **Save** button and exit the System Configuration application.
16. Run the following insert statement in the user schema:

```
INSERT INTO CWFTEMPLATECONFIG (NAME,DATA) values
('careConfig.uwsConfiguration','<uwsConfiguration><name>careConfig.uwsConfigura
tion</name><hierarchy>productCatalog</hierarchy><CON_TYPE_SUBSCRIPTION>SUB</CON
_TYPE_SUBSCRIPTION><CON_TYPE_OFFER>OFF</CON_TYPE_OFFER><CON_TYPE_PRODUCT>PROD</
CON_TYPE_PRODUCT><CON_TYPE_COMPONENT>COMP</CON_TYPE_COMPONENT><CON_RELATION_SCO
PE>scope</CON_RELATION_SCOPE><allowedRelations>SUB_OFF,SUB_PROD,SUB_COMP,OFF_OF
F,OFF_PROD,OFF_COMP,PROD_PROD,PROD_COMP</allowedRelations><customizableRelation
s>related</customizableRelations><containsTopLevelRelations>containsTopLevel</c
ontainsTopLevelRelations><containsSubLevelRelations>containsSubLevel</containsS
ubLevelRelations></uwsConfiguration>');
commit;
```


17. To make the existing database schema compatible with the new files and settings, upgrade the database by following these steps:
  - a. In Velocity Studio, click **Database > Upgrade System** from the menu bar to open the Upgrade SQL dialog.
  - b. Specify the directory and the name of the SQL file (for example, upgrade.sql), and then click the **Save** button to create the file.
  - c. Use SQLPlus or SQL Developer to connect to the appropriate database and run this upgrade file.

**Note:** If there are no system upgrades available, a dialog box appears, indicating that no upgrades are required.

## 4.4 Assign the Privileges

To assign the privileges, complete the following steps:



1. In the Velocity Studio, click **Runtime > Run** from the menu bar or click the run button (  ) to start the framework.
2. Open your Web browser and enter the `http://<localhost>:<port>/cwf/login` Web address. For example, `http://localhost:8080/cwf/login`.
3. Enter the username and password to login (for example, `upadmin` for both the **Username** and **Password** fields), and then click the **OK** button.
4. Open the User Profile Management application and click the **Manage > Groups** from the menu bar.
5. On the Search Group page, click on the **Search** button to get the list of the user groups.
6. Double-click the appropriate user group (for example, User Profile Administrators).
7. On the Select Privileges page, first click the **Edit** button and then click the **Add** button. The Search Privileges page appears with the available privileges for that group.
8. Select all privileges and click the **Select** button. A message appears that the privilege has been added successfully.
9. Click **Upadmin** option from the menu bar, and then click the **Logout** option.
10. Log back in to the application; follow the steps defined previously in this section.
11. The **Application Selection** page appears with the available applications.
12. Double-click the icon of Unified Workstation module. The main screen of the application appears as follows:

*Figure 6 UWS User Interface*

**Note:** 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.



## 5 Add Sample Schemas

The installation of the UWS product results in a blank (no data) database. The **Sample** installation folder contains a set of interlinked schemas including user profiles, code tables, and catalog data. This section describes the process for importing the sample data.

### 5.1 Import the Configuration Variables and User Profiles

To Import the user profiles, complete these steps:

1. In your Web browser, access the System Configuration application by entering `http://localhost:8080/cwf/config` as the URL.
2. Enter **upadmin** as both your Username and Password, and then press the **Enter** key to login.
3. Click the **Import > Import** menu option; the Import dialog appears.
4. Click the **Browse** button and select the `nodeConfig.xml` from the `<installation_folder>\modules\uws\Sample` folder.
5. Click the **Import** button and then click the Save button.
6. Follow the same steps to import the `userProfile.xml` from the `<installation_folder>\modules\uws\Sample` folder.

### 5.2 Import Code Tables

To Import the code tables, complete these steps:

1. In the System Configuration application, click **Configure > Code Tables** from the menu bar.
2. The Import dialog appears; click the **Browse** button and select the **codeTables.xml** from the `<installation_folder>\modules\uws\Sample` folder.
3. Click the **Import** button; a confirmation message displays the summary of import.
4. Click the **Save** button to save the changes.

### 5.3 Import Catalog Data

To Import the catalog data, complete these steps:

1. In your Web browser, access the ECM application by entering the `http://<hostname>:<port>/cwf/ecm` (for example, `http://localhost:8080/cwf/ecm`) as the URL.
2. Enter **upadmin** as both your Username and Password, and then press the **Enter** key to login.
3. From the Overview page, click **Import/ Export > Import Catalog** from the **Quick Start** section.
4. The Import page appears with the Import type section.



5. Click the drop-down list of the **Object type to import** field. The following table describes the options for this field:

Field	Description
Object Type to import	This field indicates what type of object is being imported. The drop-down list has the following options:

6. Select the **Data** option.
7. The Import Method section appears. The following table describes the field for this section:

Field	Description
<b>Select input file path</b>	This field allows you to enter the path for the file containing the catalog data. You can enter the directory path for your image or to your catalog file to import directly from the server.
<b>Upload input file</b>	This field allows you to browse, select, and upload the catalog data file.

5. Select **Upload input file** field and upload the **exportedCatalog.xml** file from the `<installation_folder>\modules\uws\Sample` folder. The following steps describe how to upload a file:
  - a. Select the upload input file option, and then click the **Choose Files** button.
  - b. The Open dialog appears prompting you to select a file. Select the file with catalog data.
  - c. Click the **Open** button, and then click the **Upload** button.

**Note:** The fields for the import option and change management may differ for different types of files selected for these fields.

8. The Import option and Change management sections appear. As per the data import preference, enter or select the following information in the fields:



Field	Description
<b>Log general information</b>	When selected, this check box logs the information of imported data.
<b>Import domains</b>	When selected, this check box imports the domains along with data.
<b>Delete project (prior to import)</b>	Select this check box to delete the project prior importing the data.
<b>Exclude before</b>	This field allows you to exclude catalog data from a specific date during import.
<b>Max errors</b>	This field indicates the maximum number of errors being displayed while import process. The default value for this field is one hundred (100).
<b>Specify log file path</b>	This field is used to specify the directory path to save the log file.
<b>New project effective date</b>	This field indicates the changed date of the project and its objects.
<b>Project Effective End Date</b>	This field denotes the new end date for the project and its objects. It is the date when the project and its objects are no longer effective.
<b>New project status</b>	This field indicates a list of available status to select from the drop-down (for example, <b>Definition</b> and <b>Active</b> ).
<b>Validate Dates</b>	Select this checkbox to perform a validation on the dates of catalog data.


9. Click the **Start Import** button.
10. The Import Results section appears with a summary of your catalog import.
11. Click the **Close** button to return to the Overview page of Catalog.
12. Logout from the ECM application.

## 5.4 Access UWS with Data

To access UWS, after importing the sample data, follow these steps:

1. Log in to your database schema and run the **script.sql** file from the `<installation_folder>\modules\uws\Sample` folder.
2. To make the existing database schema compatible with the new files and settings, upgrade the database by following the steps described in this document.



3. Click **Runtime > Run** from the menu bar or click the run button (  ) to start the framework.
4. Open your Web browser and enter the `http://<localhost>:<port>/cwf/uws` Web address (for example, `http://localhost:8080/cwf/uws`).
5. Login using the **upadmin** credentials for username and password.

## 6 Block and Unblock Subscription

The Services section of the Dashboard for a customer will display **Block** and **Unblock** buttons if a customer has one or more subscriptions. By default, these buttons are grayed out since they cannot be implemented in a generic way. You must provide the logic for the implementation of these buttons, based on the particular systems used in your environment. You may need to override some of the metadata from UWS to add the appropriate implementation logic for these buttons. The following is a list of some of the metadata elements which can be overridden when implementing the **Block** and **Unblock** buttons:

- `careUI.services.onBlockSubscription`
- `careUI.services.onUnblockSubscription`
- `careUI.services.permBlockAccountActionDisabled`
- `careUI.services.permUnblockAccountActionDisabled`
- `careUI.services.permBlockUnblockAccountVisible`

## 7 Reference List

The following is a list of documentation for reference:

- *Velocity Studio User Guide*
- *System Configuration User Guide*
- *Ericsson Catalog Manager User Guide*
- *System Administration User Guide*

## 8 Trademarks

Ericsson, the Ericsson logo and the Globemark are trademarks of Ericsson.

Ericsson is a recognized leader in delivering communications capabilities that enhance the human experience, ignite and power global commerce, and secure and protect the world's most critical information. Serving both service provider and enterprise Customers, Ericsson delivers innovative technology solutions encompassing end-to-end broadband, Voice over IP, multimedia services and applications, and wireless broadband designed to help people solve the world's greatest challenges. Ericsson does business in more than 150 countries. For more information, visit Ericsson on the Web at [www.Ericsson.com](http://www.Ericsson.com).





## 9 Disclaimer

This document may contain statements about a number of possible benefits that Ericsson believes may be achieved by working with Ericsson. These might include such things as improved productivity, benefits to end users or cost savings. Obviously, these can only be estimates. Gains might be qualitative and hard to assess or dependent on factors beyond Ericsson's control. Any proposed savings are speculative and may not reflect actual value saved. Statements about future market or industry developments are also speculative.

Statements regarding performance, functionality, or capacity are based on standard operating assumptions, do not constitute warranties as to fitness for a particular purpose, and are subject to change without notice.

This document contains Ericsson's proprietary, confidential information and may not be transmitted, reproduced, disclosed, or used otherwise in whole or in part without the express written authorization of Ericsson.