

**Oracle® Communications Order and Service  
Management**

Task Web Client User's Guide

Release 7.3.5

**E79204-01**

April 2017

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# Preface

This guide describes how to use the Oracle Communications Order and Service Management (OSM) Task web client to manage orders. This guide describes how to create, edit, and complete orders, including other order-management tasks.

## Audience

This document is intended for OSM operations personnel who use the Task web client to manage orders.

## Accessing Oracle Communications Documentation

OSM documentation and additional Oracle documentation (such as database and WebLogic Server documentation) is available from the Oracle Help Center website:

<http://docs.oracle.com>

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## Document Revision History

The following table lists the revision history for this guide:

Version	Date	Description
E79204-01	April 2017	Initial release.





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# About the Task Web Client

This chapter provides overview information and describes the basic functions of the Oracle Communications Order and Service Management (OSM) Task web client.

OSM includes two web clients that you can use to manage orders:

- **Task web client:** Use this application to monitor and manage the tasks in an order. This application is typically used by order processing personnel to ensure that all the tasks are completed. It is also used by order fallout managers. You can also suspend and resume orders, cancel orders, and create orders manually.
- **Order Management web client:** Use this application to display an order's orchestration plan, including dependencies, orchestration stages, order components, order items, and processes. Displaying the orchestration plan is useful for developers who are modeling orders and need to see relationships between order items. You can also perform some order management tasks, such as suspending and resuming orders, cancelling orders, and managing fallout. You can open the Orchestration Management web client from within the Task web client. See "[Opening the Order Management Web Client](#)" for more information.

## Overview of the Task Web Client

The Task web client provides the user interface for order tracking and operational reporting information. You use it to create, view, edit, track, and report on orders and tasks in the OSM system using a browser. The system administrator and a user who is a part of the OMS\_client group can access the OSM Task web client.

[Figure 1–1](#) shows the Worklist, which is the main screen you use for managing orders:

**Figure 1–1 Task Web Client Worklist**

	<input type="checkbox"/>	<input type="checkbox"/>	Order ID	Source	Order State	Type
<input type="checkbox"/>	<input type="checkbox"/>		1	CommunicationsSalesOrder	In Progress	CommunicationsSalesOrder
<input type="checkbox"/>	<input type="checkbox"/>		3	Web	In Progress	VF Demo
<input type="checkbox"/>	<input type="checkbox"/>		4	Web	In Progress	VF Demo
<input type="checkbox"/>	<input type="checkbox"/>		1	CommunicationsSalesOrder	In Progress	CommunicationsSalesOrder

In this figure, each row in the table represents an instance of a task for a particular order.

You use the Worklist to manage your tasks. It displays a list of tasks for which you are responsible or which are available for you to process. You can view, add, or modify the order data included in the task view using the Task Editor. Sorting and filtering options help you to find tasks in the Worklist.

## What You Do with the Task Web Client

You use the Task web client to do the following:

- Assign tasks

If you have assignment privileges for a given task, you can assign tasks to a specific workgroup.

- Edit order data included in tasks

You can display or edit orders in the Task Editor page. Orders are displayed according to an order's data at a given task. According to the how the order is designed in Oracle Communications Design Studio, the fields are mandatory, read-only or read-write.

What you do when editing orders depends on the business requirements of your organization. Typical order editing tasks include:

- Adding or changing customer information, such as modifying the bandwidth and changing the DSLAM port.
- Changing priority information.
- Changing the state/status of an order.

See "[Editing Order Data in a Task](#)" for more information.

- Manage notifications

Notifications can be used to notify you of processes or tasks in jeopardy. OSM provides the capability of sending event notifications to user and groups once, periodically, or when certain conditions arise in an order or task. You can also configure notifications to be sent by email to user groups.

The Notifications page is where you view and acknowledge notifications on the order process or order data in the OSM system. When a given notification condition is detected, each targeted user and workgroup is notified and an entry is added to the notification list.

Notifications are set up in Design Studio. If you are a solution modeler, see the Design Studio Help for more information.

- Manage order exceptions

An exception is a mechanism used to interrupt or stop an order, or to redirect it to any task in the same process or any other process.

See "[About Raising Exceptions](#)" for more information.

- Create orders

Orders typically originate from one or more external order entry systems and are not manually created.

See *OSM Concepts* for more information.

- Run queries to find orders

You can locate any order in the OSM system using the Query option. You can query for any order, including completed orders.

See "[About the Query Preferences Page](#)" for more information.

- View order history and audit data

Audit data is captured with each order for all changes to data and is maintained as long as needed in the OSM system. You can use this information for operational, service level agreement, or business analysis purposes. Order History provides a process history for a given order. When task state changes occur, OSM records the date and time of the change, and the user who made the change.

See "[Displaying the Process History](#)" for more information.

- Run reports to get data about orders in the OSM system

Reports provide summarized information on all orders and tasks in the OSM system. For example, you can view reports such as, the number of overdue orders, the oldest orders, the most recent orders, and the completed tasks for each order.

The order detail report provides information on any order in the system. You can view, print, or save this report to an ASCII text file.

See "[Viewing Reports](#)" for more information.

## About OSM Tasks

Most of the work you perform in the Task web client is based on completing OSM tasks. A *task* is a step in a process. Typically, tasks are activities on an order and can be manual or automated. Orders that are in progress (have started but have not completed) can have more than one active simultaneously. This means that one or more users can be working on a single order simultaneously, though only one user can work on a specific task for that order at any one time.

Manual tasks are tasks that you perform using the Task web client. As an order moves through a process, it arrives at tasks based on the way the process is defined. When an order arrives at a task, it is added to the worklist of all the members of all the workgroups who are assigned to work on that task. Users belonging to those workgroups can see the new task in their worklist when they refresh the Worklist page

by clicking the **Refresh** button. Users can select a task from their worklist to view the assigned task in the order process.

Automated tasks are used primarily to provide interfaces to other systems. They may occasionally show up briefly in the Worklist, depending on your system configuration, but you can usually ignore them.

A task duration is specified in Design Studio, and is used to calculate expected duration of an order. The duration for both automated and manual tasks is expressed in weeks, days, hours, minutes, or seconds. The duration can be evaluated either based on normal clock/calendar time or on the schedule defined for the workgroup to which the task is assigned, depending on how the task is configured. For more information about workgroup schedules, see *OSM System Administrator's Guide*. For more information about task types and states, see *OSM Concepts*. You can see the expected completion date of a task, based on the expected duration, in the Process History page. For more information about the process history, see "[Displaying the Process History](#)."

Task states are used to indicate what is happening to a task. Tasks have the following predefined states:

- Accepted
- Assigned
- Completed
- Received

You can manually change the state of a task. Changing the state of the task is known as *transitioning* the task. Also, the state of the task transitions automatically when you perform an action, such as complete the task. See "[Changing the State and Status of a Task](#)" for more information.

## About OSM Processes

A *process* is a sequence of tasks that are executed consecutively or concurrently to fulfill an order or part of an order. For example, an extremely simple process might start with a manual task to add inventory information, continue with an automated task to a provisioning system to create a service on the network, and complete with an automated task to update a CRM system with the order completion.

Processes are of the following types:

- **Standard:** In a standard process, OSM returns you to the worklist after it completes each task.
- **Workstream:** In a workstream process, OSM takes you directly to the next task, without first returning you to the worklist, as long as you are a member of the workgroup that is assigned to the next task. You can, however, stop a workstream task from processing, or reassign it. See "[About Workstream Processes](#)" for more information.

Standard and workstream processes are defined by the designer in Design Studio.

## About Managing Tasks

In most cases, orders are created in an external system such as a CRM, and sent to OSM for processing.

A typical process for managing a task is as follows:

1. The task is displayed in your Worklist.

2. You accept the task.
3. You use the Task Editor to make the required changes to the task data.
4. You complete the task.
5. If configured, the next manual task in the process for the order is displayed in the Worklist for processing.

## About Managing Orders

You can perform the following order operations using the Task web client.

- **Add remarks to orders:** Adding a remark to an order enables you to record information about the order.
- **Suspend and resume orders:** Suspending an order temporarily stops all activity on that order. You typically suspend an order when you need to wait for requirements to be collected to complete a task and don't want anything done to the order. When it is possible to resume processing the order, you resume it.
- **Raise exceptions on orders:** You raise exceptions on orders for the following purposes:
  - To redirect the order to another task.
  - To immediately stop processing an order.

When you initiate fallout on an order, you might need to process redo and undo compensation tasks. See *OSM Concepts* for more information about how changes to orders are managed.

- Perform an *undo task* to undo and roll back the changes made from the task that caused the error.
  - Perform a *redo task* to redo the task that caused the error.
- **Cancel an order:** Cancelling an order stops all OSM activity on that order and undoes all the completed tasks as defined in the compensation for the task.
- **Amend an order:** An order can be amended automatically or manually. You amend an order when the order information needs to be revised outside the context of a manual task. You must revise the order by making minimum changes to the order. When an order changes, the system identifies all task instances that are affected by the changed order data. Some tasks can be changed automatically by the system, but others need to be manually worked on. In that case, the order transitions to the Amending state. The system builds a compensation plan based on all affected task instances, and creates redo or undo tasks as necessary.



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## Getting Started with the Task Web Client

This chapter describes how to start the Oracle Communications Order and Service Management (OSM) Task web client and describes the functionality available in the system.

### Accessing the Task Web Client

The Task web client is a web-based application that you open in a browser. For browser and version compatibility with the Task web client, see the discussion of software requirements in *OSM Installation Guide*.

For access to the Task web client, you need a user name and password provided by an OSM system administrator. The user name must be a member of the **OMS\_client** WebLogic group. See *OSM System Administrator's Guide* for more information about setting up users and groups.

Ensure that your browser is *not* set to display the client using Compatibility View. For more information about Compatibility View, consult the documentation for your browser.

To avoid errors when accessing the Task web client:

- Clear your Internet cache before accessing the Task web client for the first time after an OSM upgrade
- Configure your browser to check for newer versions of stored pages automatically

### Logging In to the Task Web Client

To log in to the Task web client:

1. In your web browser, enter the following URL:

**`http[s]://host:port/OrderManagement`**

where:

- *host* is the IP address of the Oracle WebLogic server that hosts the Task web client
  - *port* is the Oracle WebLogic server's port number.
2. In the **Username** field, enter your user name.
  3. In the **Password** field, enter your password.
  4. Click **Login**.

The Task web client opens, displaying the Worklist.

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**Note:** To log in to the Task web client with multiple user accounts from the same browser, you must establish a new browser session for each user account. See the browser documentation for information about how to establish a new session.

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## Logging Out of the Task Web Client

To log out of the Task web client:

Click **Logout**.

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**Note:** Closing your browser or navigating to another URL does not log you out of the Task web client. However, after a pre-defined period of inactivity, you are logged out automatically and any unsaved updates are lost.

The default timeout is 45 minutes, but the OSM installer or an OSM system administrator can change the value. See "[Changing the Default Timeout Setting](#)" for more information.

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## Changing the Default Timeout Setting

To change the default timeout setting:

1. Unpack the **oms.ear** file. See *OSM Developer's Guide* for more information.
2. Open the *OSM\_Home/SDK/Customization/osm-war/WEB-INF/web.xml* file, where *OSM\_Home* is the directory in which OSM is installed.
3. Search for the following parameter:  
`session-timeout`
4. Change the value of the **session-timeout** parameter to your desired value (in minutes).
5. Save and close the file.
6. Repack **oms.ear**. See *OSM Developer's Guide* for more information.

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**Note:** Changing the **session-timeout** parameter changes the automatic timeout for both the Order Management web client and Task web client.

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## About Task Web Client Pages

The main pages in the Task web client are as follows:

- **Worklist page:** Use the Worklist page to display a list of orders located at the tasks for which you are responsible.
- **Query page:** Use the Query page to retrieve any orders in the system, including those that are not located in your task list.
- **Reporting page:** Use the Reporting page to get summarized information on all orders and tasks in the OSM system. You can display the number of overdue orders, the oldest orders, the most recent orders, and the completed tasks for each order.



- Notifications page: Use the Notifications page to manage notifications for the OSM system.
- Options page: Use the Options page to set your email account to receive notifications, select specific time zones, and change the initial screen displayed by the OSM system when you log in.

After you log in to the Task web client, the default page is displayed. By default, this is the Worklist page, but a different page may have been selected during the OSM installation.

## Opening the Order Management Web Client

When working on a task in the Worklist, you may be required to examine the orchestration plan of a particular order in the Order Management web client so that you can troubleshoot the fulfillment progress of the overall orchestration order. For example, if you are responsible for the overall success of an order, including performing manual tasks contained within that order, you might open the Order Management web client to see if the orchestration of the order progresses after you have completed a manual task.

To open the Order Management web client from within the Task web client:

1. From the Worklist page, do one of the following:
  - Select the **Editor** button and then click the ellipsis button beside the order.
  - Right-click the order and select **Accept and Edit Task**.

The Task Editor page is displayed.

2. Click the **View Summary** button.

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**Note:** The **View Summary** button is visible only for orders that have an associated orchestration plan.

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The Summary page in the Order Management web client is displayed in a new window. The window is displayed in context for your order.

**Tip:** You can use your web browser general settings to choose to display the Order Management web client on a new tab or display it in a new window.

3. Find the orchestration details you require for the order.  
For example, select the **Orchestration Plan** tab to examine the orchestration view of the order.
4. Close or exit the window and return to the Task web client.

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**Important:** Close or exit the browser window instead of logging out of the Order Management web client. Logging out of one web client automatically logs you out of the other.

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5. If you edited order data in the Order Management web client, refresh the Task web client so that you can see the updates.



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## Managing Tasks and Orders

This chapter describes how to manage tasks and orders in Oracle Communications Service and Order Management (OSM) Task web client.

### About Displaying and Managing Tasks and Orders

Tasks and orders are managed through the Worklist.

The Worklist page displays a list of tasks for which you are responsible. The following options for working with a task in the worklist are displayed at the top of the window:

- **Editor:** Lets you edit an order.
- **Preview:** Lets you preview an order (read-only).
- **Process History:** Displays the history of processes.
- **Copy Order:** Lets you copy an order.
- **Add Remark:** Lets you add remarks and attachments to an order.
- **Notification History:** Displays the notification history.
- **Change State/Status:** Lets you change the state/status of a task.
- **Exception:** Lets you raise an exception.

The **Refresh** button on the Worklist page lets you refresh the Worklist to display the tasks currently available to you.

See "[Displaying, Hiding, and Reordering Columns](#)" to display specific columns in the Worklist.

[Figure 3–1](#) shows the Worklist page. Changed tasks are shown in italicized, bold text. Click **Refresh** to see the current information about changed tasks.

**Figure 3–1 Worklist Page with Changed Order**

Order ID	Source	Order State	Type	Prior
5	OSMCom_3PlayOrder	In Progress	OSMCom_3PlayOrder	
6	OSMCom_3PlayOrder	In Progress	OSMCom_3PlayOrder	
7	OSMCom_3PlayOrder	In Progress	OSMCom_3PlayOrder	

## About the Order and Task Data Displayed in the Worklist

You can customize the Worklist page to display the information you want to see using Worklist Preferences, change the sort order and filtering, and adjust the colors of the Worklist. The default sort order for the worklist is based on tasks of the most relevance to the user. The tasks are displayed in the following order from the top down:

1. Accepted by user (task state is **accepted** and the user name is the current user).
2. Assigned to user (task state is **assigned** and the user name is the current user).
3. Tasks that can be accepted by user (task state is **received**).
4. Suspended tasks (task state is a user-defined state).
5. Tasks accepted and assigned to other users.

Table 3–1 lists the columns available in the Worklist. Not all of the columns are visible by default. See "Displaying, Hiding, and Reordering Columns" to display additional columns in the Worklist.

**Table 3–1 Columns in the Worklist Page**

Column	Description
Execution Mode	The mode under which a task is running. May be one of Do, Redo, or Undo, Do in fallout, Redo in fallout, or Undo in fallout. Do is the default mode for a task that executes under normal processing; redo and undo are used in amendment processing. Do, Redo, and Undo in fallout are used when an order fails.
Expected Duration	The amount of time the order is expected to take to complete processing. The expected duration format is as follows: <code>P[daysD] [T[hoursH] [minutesM] [secondsS] ]</code>
Expected Grace Period Completion	The date and time the grace period for suspended, canceled, or amending orders is expected to be completed. The grace period specifies the time permitted for active tasks to complete gracefully.

**Table 3–1 (Cont.) Columns in the Worklist Page**

<b>Column</b>	<b>Description</b>
<b>Expected Order Completion Date</b>	<p>The date and time when the order is expected to be completed. This is calculated as follows:</p> <ul style="list-style-type: none"> <li>■ If OSM receives the order after the expected start date, then the expected order completion date is the expected duration added to the order creation date.</li> <li>■ If OSM receives the order before the expected start date, or if it has no expected start date because it is a process-based order, then expected order completion date is the expected duration added to the expected start date.</li> </ul>
<b>Expected Start Date</b>	The date when the order is expected to start processing.
<b>Expected Task Completion Date</b>	The date and time that the task is expected to be completed.
<b>Has Failure</b>	Whether the order contains one or more tasks in a failed state. This may or may not be the current task.
<b>Namespace</b>	The namespace of the order.
<b>Order Creation Date</b>	The date and time that the order was created.
<b>Order ID</b>	Unique system-generated order identifier.
<b>Order State</b>	<p>The state of the order as it progresses through its life cycle. Valid states are:</p> <ul style="list-style-type: none"> <li>■ Not Started: The order has been created but has not started provisioning. Only the creation task exists.</li> <li>■ In Progress: The order is being provisioned and has at least one live task running.</li> <li>■ Suspended: The order has been suspended and all processing on the order has halted. No task can be updated or transitioned.</li> <li>■ Cancelled: The order has been canceled. All tasks have been undone back to the creation task.</li> <li>■ Amending: The order is processing an amendment. The process is compensating for the amended data by identifying which tasks are affected by the changed data and undoing or redoing them as necessary.</li> <li>■ Cancelling: The order is processing a cancellation. At least one live task is running in the undo compensation mode. The process is undoing all completed tasks to return the order to the creation task.</li> <li>■ Completed: The order has completed provisioning. There are no live tasks and processing is complete.</li> <li>■ Failed: The order has failed.</li> <li>■ Aborted: The order is terminated.</li> <li>■ Waiting: The order is in the waiting state.</li> <li>■ Waiting for Revision: The order is waiting for revision. The revision order should contain data changes that fix any data errors that were received earlier.</li> </ul>
<b>Order Type</b>	Defined by the user in the cartridge. For example, facility change, request for new line, etc.
<b>Priority</b>	The priority value of the order, where 0 is the lowest value and 9 is the highest where the lowest value carries the highest priority.
<b>Process</b>	The name of the process. For example, Creation Process.

**Table 3–1 (Cont.) Columns in the Worklist Page**

Column	Description
Process Status	The status of the order in the process. It is configurable in Design Studio.
Ref. #	An alphanumeric value associated with the order, typically to associate the OSM order with an external identifier, such as a sales order.
Requested Delivery Date	The date by which the customer requests the order to be delivered.
Source	Where the order originated. For example, API, cartridge name, etc.
Started	Date and time when the order entered the task.
Target Order State	The state to which an order will transition as a result of an order state change (for example, from In Progress to Completed). This is only used when the order is in grace period.
Task Name	The name of the task where the order is currently located.
Task State	State of the task associated with the order. Valid states are: <ul style="list-style-type: none"> <li>Received: The task for the order has been received in the system and is waiting to be accepted.</li> <li>Assigned: The task for the order has been assigned to a user.</li> <li>Accepted: The task for the order has been accepted by a user and is working on it.</li> <li>Suspended: The task is suspended at a task state defined by the cartridge designer.</li> </ul>
Type Order	The action of the order (for example, Add).
User	The user who has accepted the task, suspended the task, or to whom the task has been assigned.
Version	The version of the order.
Workgroups	The workgroups (roles) to which the user belongs.

## Filtering and Sorting Tasks in the Worklist

You can filter tasks in the Worklist by Order ID and Reference number. You can also sort the tasks by any column in the worklist.

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**Note:** These methods of filtering and sorting are dynamic and will not be saved as user preferences. See ["Setting Worklist Preferences"](#) for more information on filtering the Worklist by preferences.

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To filter orders by order ID or reference number:

1. In either or both filter fields at the top of the Worklist, enter filter expressions. You can use the following wildcards in these fields:
  - asterisk (\*) symbol: use this symbol to represent one or more missing characters.
  - question mark (?): use this symbol to represent exactly one character.

The system filters the Worklist based on the validated input.
2. Click **Refresh** to apply the filter to the worklist.

3. To remove the filter, delete the contents of the filter fields and click **Refresh**.

To sort the tasks in the Worklist:

Click the heading of the column that you want to use to sort the tasks. Click once to sort the values in ascending order, or click twice so sort the values in descending order.

## Managing Tasks

You can view task information and manage tasks from the Worklist.

### About the Task Editor

Use the Task Editor to enter the order information. Information can be optional, mandatory, or read-only. These information types are determined when the manual task is configured and designed.

#### Viewing Expanded or Collapsed Nodes

The Task Editor has an **Expand/Collapse** button that lets you display or hide node details as required. This feature lets you manage the way in which OSM displays the order information.

By default, the Task Editor displays all of the nodes in the expanded mode. If you change the size of a node, OSM remembers the change for that instance of the node for the duration of your session. If you close your session, OSM returns the nodes to their default size when you reselect the order for editing or viewing or when you restart the session.

You can, however, change the default, so that a particular node always opens in the size of your choice.

---

**Note:** The default node size applies only within a specific page. If the same node appears in several pages, you must set the default for the node within each page.

---

To change the default:

1. Navigate to the Worklist page.
2. Do one of the following:
  - Click the **Editor** button and then click the ellipsis button beside the order.
  - Right-click the order and select **Accept and Edit Task**.
3. In the Task Editor, size the node as you want.
4. Right-click the **Expand/Collapse** button.  
OSM displays the: **Set current visibility as default** message.
5. Click the message.

The default changes and OSM displays that instance of the node, in that page, at that size whenever you open a session.

### Viewing and Updating Data with the Distributed Order Template

The distributed order template is a structure data type that is available only for order item specifications. It improves performance. For more general information about the distributed order template, see *OSM Concepts*.

When you view or update distributed order template data in the Task web client, you will see the type of the data displayed next to the name of the data element. In [Figure 3–2](#), the **orderItemRef** field is of type **CustomerOrderItemSpecificationType** type.

**Figure 3–2 Distributed Order Template Node**

### Previewing Orders

You may want to preview the order to go over the order details without editing the order. You can preview the order even if the task is accepted by another user.

[Figure 3–3](#) shows how the information in the Task Editor is displayed.

**Figure 3–3 Previewing an Order**

To preview an order:

1. Navigate to the Worklist page.
2. Do one of the following:
  - Click the **Preview** button and then click the ellipsis button beside the order.
  - Right-click the order and select **View Order Data**.



## Displaying the Process History

The process history displays the current task as well as the tasks that have been completed for an order. It also contains the dates, times, and all user information for that order as it goes through the process. You can also display the Process History page in a pie chart, Gantt chart, or diagram by clicking the **Pie Chart**, **Gantt Chart**, or **Diagram** button.

When you display the Gantt chart, you cannot use the browser's back or forward arrows. To customize the Gantt chart width, height, and property panel, see your System Administrator.

If the process history contains both tasks whose duration is based on a workgroup schedule and tasks whose duration is based on normal clock/calendar time, the actual duration is calculated based on normal clock/calendar time. Figure 3-4 shows the process history.

**Figure 3-4 Process History - Summary Table Page**

New Order

Worklist

Query

Reporting

Notifications

Options

Summary Table

Detailed Table

Pie Chart

Gantt Chart

Edit Order

## Process History - Summary Table

[Open new window to print/save](#)

**Order ID : 5    Reference # : ORP-1**

Task	Expected Completion Date	Actual Duration	Exception	State	Started	Co
Summary	04/08/2014 11:52:07 AM	3 day(s)1 hr(s) 13 min(s)36 sec (s)			04/04/2014 11:34:06 AM	
OSMCom_3PlayOrder order entry task (Creation Process)	04/04/2014 11:34:06 AM	2 sec(s)			04/04/2014 11:34:06 AM	04/0 11:3
		0 sec(s)		Accepted	04/04/2014 11:34:06 AM	04/0 11:3
		2 sec(s)		Completed	04/04/2014 11:34:06 AM	04/0 11:3

To display the process history:

1. Navigate to the Worklist page.
2. Do one of the following:
  - Click the **Process History** button and then click the ellipsis button beside the order.
  - Right-click the order and select **View Order Process History**.

## Accepting Tasks

You can accept any task that is in the Received state in your Worklist. When you select a task for editing, OSM automatically accepts the task. If the task you have selected has been opened by another user, it is read-only.

To accept a task:

1. Navigate to the Worklist page.
2. Click **Refresh**.  
The Worklist page is updated.
3. Do one of the following:
  - Click the **Change State/Status** button and then click the ellipsis button beside the task that is in the Received state.
  - Right-click the task that is in the Received state and select **Change Task State/Status**.
4. Select **Accepted**, then click **Update**.

## Reassigning Tasks

Before you reassign a task in the Task web client, you must apply the necessary permissions to the task in Design Studio OSM.

See “About Reassigning Tasks” in the Design Studio Modeling OSM Processes Help for more information.

To reassign a task:

1. Navigate to the Worklist page.
2. Do one of the following:
  - Select **Change State/Status** and then click the ellipsis button beside the task to be reassigned.
  - Right-click the task and select **Change Task State/Status**.  
The Change State/Status page is displayed.
3. From the **Assigned To** list, select the user to whom you want to reassign the task.
4. Click **Update**.

## Completing Tasks

To complete a task, you must complete all mandatory fields. If you do not have all of the information to complete the fields, you can save and close what you do have. The task is held in an Accepted state or a user-defined state until you complete the information and change the state to Completed.

If you accept a task containing default values, the task is automatically modified. You must save the task in order to save the default values. Default values are defined by your administrator for fields in a given page and are then displayed in the Task web client Editor.

To complete a standard task:

1. In the Worklist, click **Editor**, then select the ellipsis button beside the task.  
Alternatively, right-click the task and select **Accept and Edit Task**.  
The Task Editor page is displayed.
2. Enter the information and click **Save**.
3. Click **Change State/Status**, select the appropriate task status, and then click **Update**.

## Completing a Workstream Task

To complete a workstream task, click the status that is defined for that task. When you do this, OSM takes you to the next task in the workstream. You are taken to the Worklist page only after the final workstream task is completed or if you are not associated with a workgroup that is associated with the subsequent workstream task.

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**Note:** If the task that follows an automated task in a workstream process uses a rule on transition, and if that rule evaluates to false, the process displays the wait screen until the rule evaluates to true. If the rule does not evaluate to true within the specified time-out period, OSM displays a message indicating the time-out period is expired. To clear this message, click **OK**.

If the rule fails to evaluate to true within a reasonable period of time, inform your system administrator.

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## Editing Order Data in a Task

To edit an order, you must have specific privileges assigned to you by the OSM Administrator.

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**Note:** If you make any changes to the orders in Task web client, click the **Refresh** button to load the latest state of the orders in OSM.

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**Note:** If you update an order either to add a node (which includes providing a value to a node that did not previously have one) or to delete a node (which includes setting the value of a node to null), the OSM order transformation manager will not propagate the change in either the forward or reverse direction.

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**Note:** The Task web client trims off the white space to the left of the beginning of a text block and to the right of the end of a text block. For example, if enter the following in a text field with white space before and after the text block:

190    Attwell Drive

when you save or update the task, the Task web client removes all white space at the beginning and the end of the text block:

190    Attwell Drive

---

---

## Editing Data in an Order

To edit an order:

1. Navigate to the Worklist page.
2. Do one of the following:
  - Click the **Editor** button and then click the ellipsis button beside the order.
  - Right-click the order and select **Accept and Edit Task**.

The Task Editor is displayed.

3. Edit the order, then click **Update**.

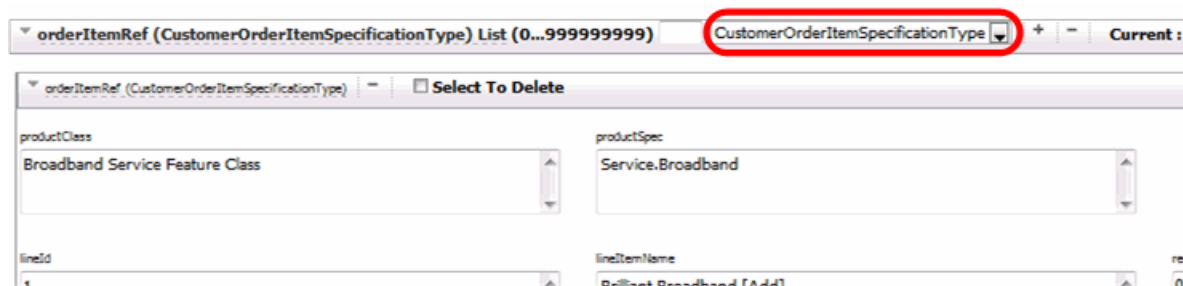
### Adding Node Instances

You can add instances of group or value nodes to an order, either individually or in bulk.

To add node instances individually:

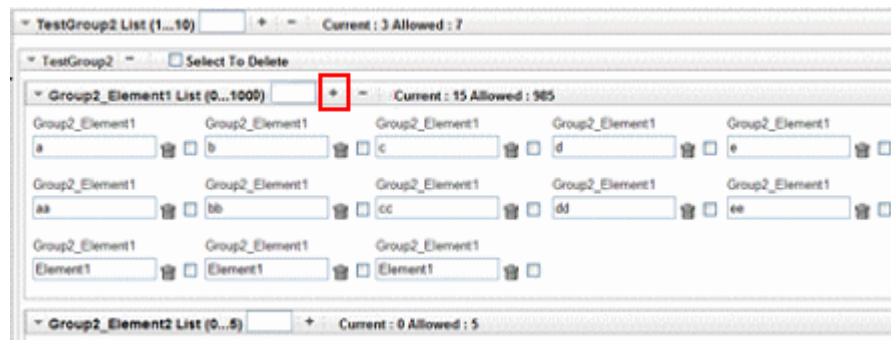
1. Log in to the web client.
2. Open the order in the editor.
3. Navigate to the node to which you will add an instance.
4. Ensure that the small field between the element name and the + icon is empty.
5. If the node you are adding instances to is a distributed order template node, select the data type from the list in the large field between the element name and the plus icon. The type you select should match the type that is listed in parentheses after the data element name, as shown in [Figure 3–5](#). See ["Viewing and Updating Data with the Distributed Order Template"](#) and *OSM Concepts* for more information about the distributed order template.

**Figure 3–5 Adding a Distributed Order Template Node**



6. Click + adjacent to the node, as shown in [Figure 3–6](#).

**Figure 3–6 Adding a Node Instance**



An instance of the node is created in the system.

7. Repeat steps 2 through 6 to add additional node instances.

The system restricts the number of instances you can add for each node based on the values of the **Current** and **Allowed** parameters displayed beside the instance count box. The value of the **Current** parameter indicates the number of instances currently in the system for a specific node. The value of the **Allowed** parameter indicates the maximum permissible instances for the node.

The maximum number of instances you can add to a node equals the difference between the values of the **Allowed** and **Current** parameters.

The + icon disappears the moment the number of instances you add matches this difference. This prevents you from adding instances in excess of the maximum permissible limit for instances.

To add node instances in bulk:

1. Log in to the web client.
2. Open the order in the editor.
3. Navigate to the node to which you will add instances.
4. In the small field between the element name and the + icon, specify the number of node instances you want to add.

The values of the **Current** and **Allowed** parameters are displayed beside the instance count box. These values help you determine the number of additional instances you can add to the node. The value of the **Current** parameter updates dynamically based on the number of instances currently in the system.

5. If the node you are adding instances to is a distributed order template node, select the data type from the list in the large field between the element name and the plus icon. The type you select should match the type that is listed in parentheses after the data element name. See ["Viewing and Updating Data with the Distributed Order Template"](#) and *OSM Concepts* for more information about the distributed order template.
6. Click + adjacent to the node.

The new instances are created if their count does not exceed the difference between the **Allowed** and **Current** parameter values. Otherwise, the system prompts you to either create the number of instances that equals this difference or cancel the entire operation.

The + icon disappears the moment the number of instances you add matches this difference. This prevents you from adding instances in excess of the maximum number allowed by the system.

The response time of the Task Editor page increases with the number of nodes in an order. To avoid slow response times, the `order_editor_submit_mode_threshold` parameter in the `oms_config.xml` file is configured to a threshold value for node instances saved in the system. If the number of saved instances increases this threshold value, the system automatically switches from AJAX to form-submit mode when edited orders are saved or submitted for processing.

## Deleting Node Instances

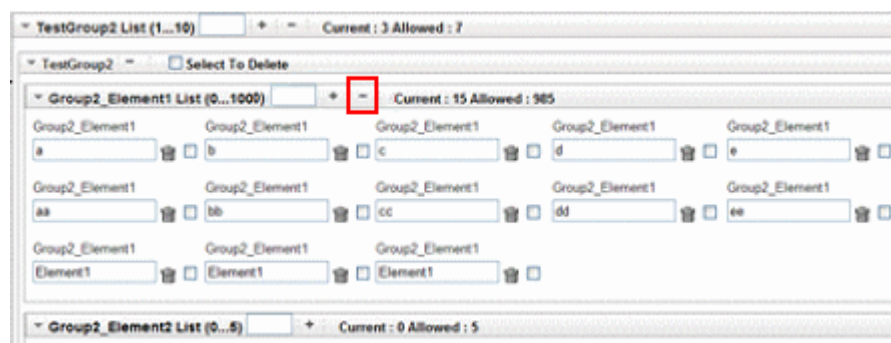
You can delete instances of group or value nodes from an order, either individually or in bulk.

To delete node instances:

1. Log in to the web client.
2. In the Worklist, navigate to the order from which you want to delete a node instance.

3. Double-click the order.
4. Navigate to the node from which you want to delete an instance.
5. Do one of the following:
  - To delete one or more instances of a value node:
    - Select the check boxes next to the instances you are deleting.
    - Click the **Trash** icon.
  - To delete one or more specific instances of a group node:
    - Select the check boxes on the header bar for the instances you are deleting.
    - Click -, as shown in [Figure 3-7](#).

**Figure 3-7 Deleting a Node Instance**



- To delete one or more instances of the node from the end of the node list
  - In the small field between the element name and the + icon, specify the number of node instances you want to delete from the end of the node list.
  - Click -.

The system restricts the number of node instances you can delete based on the minimum and maximum permissible instances for a node. These limits are displayed beside the instance count box.

You can delete node instances until the number of current instances falls to the minimum permissible limit. At this point, the - icon disappears, thereby preventing you from deleting additional instances.

The system restricts the number of instances you can delete based on the values of the **Current** and **Allowed** parameters displayed beside the instance count box.

The system deletes the instances, starting from the last, after verifying that after deletion the instance count does not fall below the minimum permissible limit.

You can delete node instances till the number of current instances falls to the minimum permissible limit. At this point, the - icon disappears, thereby preventing you from deleting additional instances.

## Changing the State and Status of a Task

After you perform the work required by the task and enter the information in the Task Editor, you must change the state or completion status to allow the order to continue to its next tasks. [Table 3-2](#) shows the task states.

**Table 3–2 Available Task States**

State	Description
Received	The order has arrived at the task and needs to be worked on.
Accepted	Locks the order for the user in the current task.
Assigned	The task has been assigned to a user in the role.
Completed	Work on the task is finished.
Suspend	It is a user-defined state. All user-defined states are considered suspend states.

The Completed and Suspend states are conceptual states. These states are not displayed in the Worklist or task state list.

You must change the state or completion status after you complete a task. Statuses are used to determine the next step in the process. Predefined statuses for standard processes include:

- True
- False
- Submit
- Delete

When using a workstream process, statuses appear as buttons on the workstream Task Editor's interface, which you click to assign the desired status. Much like the navigation buttons in any other wizard, the status buttons in a workstream process let you advance to the next task, go back to the previous task, cancel the task, and so on. Predefined statuses for workstream processes include:

- Back
- Next
- Cancel
- Finish

See ["About Workstream Processes"](#) for more information about workstreams.

A list of available states and completion statuses is displayed in the Change State/Status page based on the current state of the task and its location in the process.

You can change state/status of only those tasks in your Worklist.

To change the state/status of a task:

1. In the Worklist, select **Change State/Status** and then select the task.  
The Change State/Status page is displayed.
2. Select the state and click **Update**.

## About Workstream Processes

In OSM, a process is a sequence of tasks that execute consecutively or concurrently to fulfill an order or part of an order.

There are two types of processes, standard and workstream. In a workstream process, OSM takes you directly to the next task without first returning you to the Worklist.

To execute a workstream:

- You must be logged in to the Task web client.
- An order that contains a process that was defined as a workstream process must be in progress.
- You must be a member of the role responsible for processing workstream tasks.

See "[Completing a Workstream Task](#)" for information about completing a workstream task.

### About Stopping and Reassigning a Workstream Task

You can stop a workstream and return to the Worklist by clicking the **Worklist** button. In the Worklist, you accept the task that you last worked on. Click **Refresh** to see the task that you last worked on. If another user wants to work on this task, change the state of this task to Received or reassign it to the user who has the necessary permissions to work on this task.

### Automatically Transitioning from the Creation Task

OSM automatically transitions you to the Task Editor in the workstream after the creation task if the first task in the workstream is a manual task.

To automatically transition from the creation task:

1. If the first task in the workstream after the creation task is a manual task, the system automatically transitions you to the default Task Editor to edit the task.

If the first task in the workstream after the creation task is an automatic task, the system runs it, then continues executing any remaining tasks in the workstream.

---

**Note:** If the system is executing an automatic or rule task, the system provides an indication that processing is taking place until the next manual task within the workstream is available. When the next manual task becomes available, the task is accepted and displayed in the Task Editor. While processing is occurring, you can stop the workstream and return to the Worklist. Then, when the workstream task becomes available, you (or someone else in the workgroup) can pick it up and continue the workstream from that point.

---

2. Complete the data required for the task.
3. Indicate the task is completed. Each task in the workstream needs to be completed to go to the next task.



---

**Note:** This also sets the state for the task (as defined by the administrator). OSM treats task completion through workstream statuses (Next, Previous, Cancel, and Finish) the same way as it treats regular task completion and does not apply the wizard behavior. For example if you select Previous, the system does not roll back to the previous position in the process. It completes the task at the Previous status, then takes you to the next task in the Task Editor, according to the defined process flow. By default, OSM does not roll back any changes made by previous tasks. You can do this, however, by means of a plug-in assigned to the status (Cancel or Previous). If you decide to exit from the workstream, you can always go back to the Worklist to continue the workstream. Alternatively, another user in your workgroup can pick up the workstream and begin working on it at a later time.

---

4. Repeat the steps above until there are no more manual tasks in the workstream process. When you complete the final task in the workstream, the system returns you to the Worklist.

---

**Note:** Tasks that are created as a result of an amendment (redo and undo tasks) are not supported in the same way as normal (do) tasks in the workstream. You will be returned to the Worklist to process these tasks outside of the workstream.

---

### Rolling Back a Workstream Task

The workstream rollback feature lets you return the order data to the condition it was in before you entered the current task. Because the rollback executes when you click the **Back** button, the order advances according to how your **Back** button status is defined.

The following example illustrates how the rollback works:

1. OSM moves the workstream process from Task A to Task B.
2. You pick up the order at Task B, make changes to the order data, then save the changes.
3. You decide to undo the change that you made while executing Task B, then click the **Back** button.
4. OSM rolls back the changes you made to the order data so that it appears as it did before you entered Task B, then takes you to another task. The task it takes you to depends on how the process that you are working in was designed.

### Failing a Task

Failing a task on an order transitions the task into a fallout execution mode. There are three fallout execution modes that correspond to normal execution modes:

- **Do in Fallout:** The mode for a task that executes when the task fails while running in Do mode.
- **Redo in Fallout:** The mode for a task that executes when the task fails while running in Redo mode.

- **Undo in Fallout:** The mode for a task that executes when the task fails while running in Undo mode.

You can access the Fail Task function from either the Worklist or Query Results page. You can fail a task if the user account you use to log in to the Task web client is associated to a workgroup (role) with permission to execute a task in a fallout mode. For more information about setting permissions on tasks, see *OSM Modeling Guide*.

To fail a task:

1. In the Worklist or Query Results page, right-click the order and select **Fail Task**.  
To fail more than one task, click the check box for each task to be failed, or click the top check box to select them all.  
The Fail Task page is displayed.
2. (Optional) In the **Reason** text box, type a reason for failing the task on the order.
3. Click **Fail Tasks**.  
The task in the Worklist and the Query Results page changes to bold and italicized text.
4. Navigate to the Worklist page and click **Refresh**.  
The Execution Mode column changes to a fallout execution mode. For example, **Undo in Fallout**.  
A failed task always transitions to the Received state.
5. Do one of the following:
  - **Complete task in fallout mode:** You can continue to work on the task in the fallout execution mode until completion. If you finish a task in fallout mode, it automatically transitions to a corresponding normal execution mode, such as Do, Undo, or Redo, when the task transitions to the Completed state.
  - **Resolve Failed Task:** This function returns the task to the corresponding normal execution mode and state it had been in before failing. For more information, see ["Resolving a Failed Task"](#).
  - **Retry Task:** This function returns the task to the corresponding normal execution mode in the Received state. For more information, see ["Retrying a Failed Task"](#).
  - **Retry Order:** This function return all tasks in a fallout execution mode on the order to the corresponding normal execution mode in the Received state. For more information, see ["Retrying All Failed Tasks on an Order"](#).

## Retrying a Failed Task

You can retry a failed task that returns the task to a normal execution mode in the Received state. Using **Retry Task** function on a task in a Fallout mode does the following:

- **Do in Fallout:** Returns the task to the Do execution mode in the Received state.
- **Undo in Fallout:** Returns the task to the Undo execution mode in the Received state.
- **Redo in Fallout:** Returns the task to the Redo execution mode in the Received state.

You can access the Retry Task function from either the Worklist or Query Results page. You can retry a task in an order that is the Amending, Canceling, Failed, In Progress, Suspended, Waiting for Revision state if the corresponding state is configured with the Manage Order Fallout transition in the order life-cycle policy. See *OSM Modeling Guide* for more information about configuring order life-cycle policies.

To retry a task:

1. In the Worklist or Query Results page, right-click the order and select **Retry Task**.

To retry more than one task, click the check box for each order with a task to be retried, or click the top check box to select them all.

The Retry Task page is displayed.

2. (Optional) In the **Reason** text box, type a reason for retrying the task.

3. Click **Retry Task**.

The task in the Worklist and the Query Results page changes to bold and italicized text.

4. Navigate to the Worklist page and click **Refresh**.

The task transitions back to the corresponding normal execution mode in the Received task state.

## Resolving a Failed Task

You can resolve a failed task that returns the task to the normal execution mode and task state it had been in before failing. Using **Resolve Failed Task** function on a task in a Fallout mode does the following:

- **Do in Fallout:** Returns the task to the Do execution mode in the task state it had been in before failing.
- **Undo in Fallout:** Returns the task to the Undo execution mode in the task state it had been in before failing.
- **Redo in Fallout:** Returns the task to the Redo execution mode in the task state it had been in before failing.

You can access the Resolve Failed Task function from either the Worklist or Query Results page. You can resolve a task in an order that is the Amending, Canceling, Failed, In Progress, Suspended, Waiting for Revision state if the corresponding state is configured with the Manage Order Fallout transition in the order life-cycle policy. See *OSM Modeling Guide* for more information about configuring order life-cycle policies.

To resolve a failed task:

1. In the Worklist or Query Results page, right-click the order and select **Resolve Failed Task**.

To resolve more than one failed task, click the check box for each order with a task to be resolved, or click the top check box to select them all.

The Resolve Task page is displayed.

2. (Optional) In the **Reason** text box, type a reason for retrying the task.

3. Click **Retry Task**.

The task in the Worklist and the Query Results page changes to bold and italicized text.

4. Navigate to the Worklist page and click **Refresh**.

The task transitions back to the corresponding normal execution mode in the Received task state.

## Retrying All Failed Tasks on an Order

You can retry all failed task on an order by returning each task to a normal execution mode in the Received state. Using **Retry Order** function on an order with one or more tasks in a Fallout mode does the following:

- **Do in Fallout:** Returns each task in this mode to the Do execution mode in the Received state.
- **Undo in Fallout:** Returns each task in this mode to the Undo execution mode in the Received state.
- **Redo in Fallout:** Returns each task in this mode to the Redo execution mode in the Received state.

You can access the Retry Order function from either the Worklist or Query Results page. You can retry an order with tasks in a fallout mode that is the Amending, Canceling, Failed, In Progress, Suspended, Waiting for Revision state if the corresponding state is configured with the Manage Order Fallout transition in the order life-cycle policy. See *OSM Modeling Guide* for more information about configuring order life-cycle policies.

To retry all failed tasks on an order:

1. In the Worklist or Query Results page, right-click the order and select **Retry Order**.  
To retry tasks on more than one order, click the check box for each order with tasks to be retried, or click the top check box to select them all.  
The Retry Order page is displayed.
2. (Optional) In the **Reason** text box, type a reason for retrying the task.
3. Click **Retry Order**.  
The task in the Worklist and the Query Results page changes to bold and italicized text.
4. Navigate to the Worklist page and click **Refresh**.  
The task transitions back to the corresponding normal execution mode in the Received task state.

## Resolving all Failed Tasks on an Order

You can resolve all failed task on an order by returning each task to a normal execution mode in the task state it had been in before failing. Using **Resolve Order Failure** function on a order with tasks in a Fallout mode does the following:

- **Do in Fallout:** Returns each task in this mode to the Do execution mode in the task state it had been in before failing.
- **Undo in Fallout:** Returns each task in this mode to the Undo execution mode in the task state it had been in before failing.
- **Redo in Fallout:** Returns each task in this mode to the Redo execution mode in the task state it had been in before failing.

You can access the Resolve Order Failure function from either the Worklist or Query Results page. You can resolve a task in an order that is the Amending, Canceling, Failed, In Progress, Suspended, Waiting for Revision state if the corresponding state is

configured with the Manage Order Fallout transition in the order life-cycle policy. See *OSM Modeling Guide* for more information about configuring order life-cycle policies.

To resolve all failed tasks on an order:

1. In the Worklist or Query Results page, right-click the order and select **Resolve Order Failure**.

To resolve more than one order with failed task, click the check box for each order with tasks to be resolved, or click the top check box to select them all.

The Resolve Order Failure page is displayed.

2. (Optional) In the **Reason** text box, type a reason for retrying the task.

3. Click **Resolve Order Failure**.

The task in the Worklist and the Query Results page changes to bold and italicized text.

4. Navigate to the Worklist page and click **Refresh**.

The task transitions back to the corresponding normal execution mode in the Received task state.

## Managing Orders

You can view some order information and perform some order management operations from the Worklist.

### Adding Information to Orders

In the Worklist page, you can add remarks and attach documents pertaining to each order using the **Add Remark** option. For example, if the task for an order has taken longer to complete than expected, you can add a remark explaining why this has happened. After you add a remark, a paperclip icon is displayed in the Worklist beside the order. You can click the icon to display details, such as who entered the remark, the date and time it was entered, the task description, and the state of the task. [Figure 3–8](#) shows the details of an entered remark.

**Figure 3–8 Viewing Remarks for an Order**

	Date	Author	Task	State	
	04/07/2014 12:36:35 PM	tester	ProvisioningTask	Accepted	Order was delayed by cus

### Adding Remarks to an Order

To add remarks to an order:

1. Navigate to the Worklist page.

2. Do one of the following:
  - Click the **Add Remark** button and then click the ellipsis button.
  - Right-click the order and select **Add Remark**.
  - Click **Add Remark** in the Task Editor.

3. Add your remarks and click **Save**.

The Remarks window shows the user who entered the remarks, the date entered, the task description, and the state of the task. A paperclip icon is displayed in the Worklist beside the order that lets you display attachments and remarks.

### Editing Remarks

After you add a remark to an order, you can modify it.

To edit a remark:

1. Navigate to the Worklist page.
2. Click the paperclip icon beside the order.

The Remarks page is displayed.
3. Select the remark and click **Modify Remark**.

The Modify Remark page is displayed.
4. Change your remarks and click **Done**.

### Attaching Documents

You can attach a document file to an order only if a remark has been created.

To attach a document to an order:

1. Navigate to the Worklist page.
2. Click the **Add Remark** button and then select the order.

The Remarks page is displayed.
3. Click **Modify Remark**.

The Modify Remark page is displayed.
4. Do one of the following:
  - In the **Attach File** field, enter the file path.
  - Click **Browse** to locate the document.
5. Locate the document and click **Open**.
6. Click **Add Attachment**.
7. Click **Done**.

The Remarks window is displayed, containing information such as the user who entered the remarks, the date entered, the task description, the state of the task, and the file name of the attachment.

---

---

**Note:** To associate a remark with a document that is attached to an order, you must click both **Save** and **Done** in succession after you attach the document and add the remark.

Clicking **Save** only saves the remark with the order without associating it with the document.

---

---

### Removing Documents from an Order

You can remove a document file from an order.

To remove a document from an order:

1. Navigate to the Worklist page.
2. Click the **View Remark(s)** icon beside the order.  
The Remarks page is displayed.
3. Select the remark and click **Modify Remark**.  
The Modify Remark page is displayed.
4. In the **List of Attachments** field, select the file, and click **Remove Attachment**.
5. Click **Done**.

### Viewing Reasons

The Task Editor enables you to view reasons why specific orders were canceled, suspended, or resumed at any point during their life cycle.

The Task Editor provides a **View Reasons** button for orders that were assigned one of the following states at least once during their life cycle:

- Cancelled
- Suspended
- Resumed

Clicking the **View Reasons** button for an order displays the Reasons page for the order. This page displays the justification for the cancellation, suspension, or resumption of the order depending on the state the order was assigned.

If you enter a reason for cancellation in the **Cancel Reason** field when canceling an order, OSM stores the reason as a message string in the database. In addition, OSM displays this message in the user interface.

If you enter an empty string in the **Cancel Reason** field, OSM stores a null string in the database and displays an empty string in the user interface, instead of displaying a default system-generated order cancellation message.

## Suspending and Resuming Orders

You can suspend and resume orders from either the Worklist or the Query Results page.

### Suspending Orders

Suspending an order temporarily stops all provisioning activity on that order. Tasks that belong to the order are placed in read-only mode in the Worklist and cannot be

updated or transitioned. You can suspend an order from the following order states: Not Started, Waiting, and In Progress.

To suspend an order, you must have specific privileges assigned to you by the System Administrator.

To suspend an order from the Worklist or the Query Results page:

1. Navigate to the Worklist or the Query Results page.
2. Right-click an order and select **Suspend Order**.

To suspend more than one order, click the check box for each order to be suspended, or click the top check box to select them all.
3. Select one of the following grace period options:
  - **Suspend Immediate:** Force suspension of tasks. All tasks associated with the order become read-only and cannot be updated or transitioned.
  - **Suspend After Grace Period:** Specify a grace period to allow tasks in the Accepted state time to complete. Grace period allows ongoing work (for example, accepted tasks) to complete before transitioning the order to suspended. This helps to minimize errors in processing so that ongoing work is not interrupted without a chance to complete first.
  - **Suspend After Infinite Grace Period:** Wait indefinitely until all tasks complete.

If the suspension is not immediate, you may also specify an interval for sending a jeopardy notification.
4. (Optional) In the **Reason** text box, enter a reason for suspending the order.
5. Click **Suspend Order**.

The task in the Worklist changes to bold and italicized text.
6. Click **Refresh**.

The order transitions to the Suspended state.

### Resuming Orders

Resuming an order releases the suspended tasks back into the system for processing. Tasks are viewable from the Worklist and Query List pages and can once again be updated. Once an order is resumed, it returns to the state from which it transitioned before being suspended.

To resume an order, you must have specific privileges assigned to you by the System Administrator.

To resume an order from the Worklist or Query Results page:

1. Navigate to the Worklist or the Query Results page.
2. Right-click the order and select **Resume Order**.

To resume more than one order, in the Query Results page, click the check box for each order to be resumed, or click the top check box to select them all.
3. (Optional) In the **Reason** text box, enter a reason for resuming the order.
4. Click **Resume Order**.

The task in the Worklist changes to bold and italicized text.
5. Click **Refresh**.



The Order State returns to the state from which it transitioned before being suspended. You can now complete the order by transitioning through all remaining tasks.

## Canceling Orders

Cancelling an order stops all OSM activity on that order and undoes all of the tasks that have been done, back to the creation task. There are two order states associated with the Cancel Order function:

- **Cancelling:** When an order is in this state, at least one live task is running in undo compensation mode
- **Cancelled:** This state is the end result of undoing all completed tasks and returning the order to the creation task.

You can cancel orders that are completed, in progress, or suspended. After an order is canceled, it can be deleted or resubmitted back into the system.

---

**Note:** You should not attempt to cancel an order that is in Suspended state if it was suspended while in the Amending state and has unfinished compensation. In this situation, resume the order before canceling it.

---

You can access the Cancel Order function from either the Worklist or Query Results page. To cancel an order, you must have specific privileges assigned to you by the System Administrator.

When you cancel an order, undo compensation tasks may or may not appear in the Worklist depending on the compensation strategy defined for the task. For example, if a task is defined to roll back automatically, no undo task is created, and no undo task is displayed in the Worklist. Automated tasks may also be rolled back automatically if plug-ins exist and will appear in the Worklist until the plug-in completes them. If manual undo tasks appear in the Worklist, however, they must be acknowledged in order to be rolled back.

---

**Note:** If you cancel an order using the Order Management web client, when the order changes to the cancelled state, the **Orchestration Plan** tab of the Order Details page shows the original Orchestration Plan without any changes.

If you cancel an order using a revision order, when the order changes to the cancelled state, the **Orchestration Plan** tab of the Order Details page contains the following message:

There is no Orchestration Plan for this order. The order is either empty with no order items, or may have been cancelled.

---

To cancel orders:

1. In the Worklist or Query Results page, right-click the order and select **Cancel Order**.

To cancel more than one order, click the check box for each order to be canceled, or click the top check box to select them all.

The Cancel Order page is displayed.

2. Select one of the following grace period options:
  - **Cancel Immediate:** Force immediate cancellation of all completed tasks.
  - **Cancel After Grace Period:** Specify a grace period to allow tasks in the Accepted state time to complete.
  - **Cancel After Infinite Grace Period:** Wait indefinitely until all tasks complete.
3. (Optional) If the cancellation is not immediate, specify an interval for sending a jeopardy notification.

You can configure jeopardy notifications in Design Studio so that the notifications are sent to user groups once, periodically, or when certain conditions arise in a service order or task. See the Design Studio Help for more information.

4. (Optional) In the **Reason** text box, type a reason for canceling the order.
5. Click **Cancel Order**.

A dialog box is displayed, prompting you to confirm the cancellation request.

6. Click **OK**.

The task in the Worklist and the Query Results page changes to bold and italicized text.

7. Navigate to the Worklist page and click **Refresh**.

The order transitions to the Cancelling state and enters into compensation mode. If the compensation strategy is designed to create undo tasks, they appear in the Worklist in reverse order of the process flow. For example, if a process flows from Task A to Task B to Task C, undo tasks flow in reverse from Task C to Task B to Task A.

Each undo task must be processed (acknowledged) sequentially. Task C is displayed first and must be acknowledged before Task B is displayed in the list. Task B must be acknowledged before Task A is displayed in the list, and so on.

8. To acknowledge an undo task, select it and click **Update**.

The task in the Worklist page changes to bold and italicized text.

9. Click **Refresh**.

After an undo task is acknowledged, it is removed from the Worklist. If there are no more undo tasks in the flow, then Cancel Order is complete; otherwise, the next undo task is displayed in the list.

10. Repeat step 8 and step 9 for each undo task until it is completed.

The order transitions from Cancelling to Cancelled and may now be resubmitted or deleted.

## Creating Orders

Use the New Order page to create orders and define a creation task in the Task web client. After you enter the new order, the Task Editor page is displayed. Further information is required to complete the order.

---

---

**Note:** If you cannot access the New Order page, you have not been assigned order entry privileges. See your system administrator.

---

---

To create an order:

1. Navigate to the New Order page.
2. If you have privileges to create a versioned order, select the namespace and version from the **Cartridge** menu.
3. From the **Order Type** menu, select the order type/source.
4. (Optional) In the **Reference #** field, enter a reference number.
5. Click **Create**.

The order is created and the Task Editor is displayed. The order is in the Accepted state.

---

**Note:** Order IDs may not be assigned sequentially.

---

6. Enter the information in the required fields.

---

**Note:** The Task web client trims off the white space to the left of the beginning of a text block and to the right of the end of a text block. For example, if enter the following in a text field with white space before and after the text block:

190 Attwell Drive

when you click save the task, the Task web client removes all white space at the beginning and the end of the text block:

190 Attwell Drive

---

7. Click **Save**.

The order now progresses to the next task.

### About Versioned Orders

You must have the necessary privileges to create versioned orders. Each order you create is based on a model that consists of tasks, processes, order templates, and roles. Programmers in your organization define different models based on specific services your company provides. In OSM, a versioned order is one that is based on different versions of the OSM cartridge. You create a versioned order by selecting a namespace and version from the **Cartridge** menu. A namespace prevents conflict of entities with the same name. The use of namespaces allows service providers to separate their OSM model into specific services in their operational support system (OSS) environment. Each service can be implemented independently by a different team and then deployed into a single OSM environment.

The **Cartridge** menu is displayed by default in the New Order page; however, it is configurable and may not be displayed in certain implementations. You must also have the necessary privileges to create versioned orders.

## Copying Orders

To reduce the amount of data entry required to create orders that are similar, you can copy an existing order. For example, you may need to create orders that require a large amount of data, such as trunking orders, ISDN orders, etc.

When you copy an order, you can copy from any order in your Worklist to any order type that you can create. You can only copy the fields that are common to both the source order and the new order and that you are able to edit in the new order. Only the data exposed in the source order's creation task is copied.

To copy an order:

1. Navigate to the Worklist page.
2. Do one of the following:
  - a. Click the **Copy Order** button and then click the ellipsis button beside the order.
  - b. Right-click the order and select **Copy Order**.
3. From the **Order Type/Source** menu on the Copy Order page, select the type/source of order.
4. (Optional) In the **Reference #** field, enter a reference number.
5. Click **Create**.

The order is created and the Task Editor page opens with the information that is copied automatically displayed in the fields.

6. Do one of the following:
  - Enter the information in the required fields.
  - Edit the existing fields.
7. Click **Save**.

The copied order is displayed in the Worklist page when you click **Refresh**.

8. Click **Update**.

The order transitions to the next task.

## About Raising Exceptions

An exception is a mechanism used to interrupt or stop an order or to redirect it to any task in the same process or any other process. The choices are defined by the system administrator and identified by the exception statuses. Exceptions can be used to cancel an in-flight order, to add supplemental information to an order and redirect the order to an earlier task in the process, or to take other actions defined in the original process. Exception statuses are user-defined statuses used to alter a process flow from anywhere in the process. For instance, you may want to cancel an order, redirect an order to another task, or redirect an order to a task in another process. The exceptions can be defined with restrictions that allow only certain, specified workgroups, activities, or order type/sources to raise the exception.

OSM supports two types of exceptions:

- **Process exception:** Lets you stop an order or redirect it to any task in the same process or any other process.
- **Fallout exception:** Lets you initiate fallout from a particular task in order to correct an error caused by a previous task.

Both types of exceptions are raised in the same way, using the Raise Exception function. You can access this function from the Worklist and Query Results pages or from within the Order Editor. Depending upon how exception handling is configured for your environment, you will use either process exceptions or fallout exceptions.

To raise an exception, you must have specific privileges assigned to you. If you expect an exception to be available, but do not see it, check with your administrator to ensure the correct privileges have been assigned to you.

### Raising a Process Exception

To raise a process exception:

1. In the Worklist or Query Results pages, select **Exception** and then click the ellipsis button beside the order.

Alternatively, you can right-click the order and select **Raise Exception**. You can also raise the exception from within the Task Editor by clicking the **Exception** button.

The Exception page is displayed with one or more exceptions for the selected order. If there are no exceptions available for the process, or you were not assigned the privileges, no exceptions will be available.

An exception that stops an order from continuing displays N/A (not applicable) in the Process and Task columns. When you redirect an order, you can select an exception that displays the process and task to which it will be redirected.

2. Select the process exception and click **Update**.

The order is redirected or stopped depending on the status chosen.

---

**Note:** You cannot raise a process exception from a creation task.

If you try to raise a restricted exception against a process that has subprocesses mapped to it, you will receive a 419 Process exception error message. If this occurs, close the message and notify your administrator of the conditions under which it occurred.

---

### Raising a Fallout Exception

To raise a fallout exception:

1. In the Worklist or Query Results pages, click **Exception** and select the task, or right-click the task and select **Raise Exception**. Alternately, you may raise the exception from within the Task Editor by clicking the **Exception** button.

The Process Exception page is displayed with one or more exceptions for the selected task. If no exceptions are defined for the task, or you were not assigned the privileges, no exceptions will be available. [Figure 3-9](#) shows the Process Exception page.

Figure 3–9 Process Exception Page

Update

### Process Exception

**Order ID : 2 Reference # :**

**Active Tasks:**

Task	State	User
Choose Pattern	Received	oms
Review Details	Accepted	oms

**Select Process Exception:**

	Status	Process	Task
<input checked="" type="radio"/>	Wrong Shape		
<input type="radio"/>	Wrong Pattern		
<input type="radio"/>	Wrong Color		

2. Select the desired exception and click **Update**.
3. **Refresh** the Worklist.

The system identifies the task that generated the error, transitions the order to the Amending state, and initiates amendment order processing. (For more information refer to the discussion about managing fallout in the task web client in *OSM Concepts*.

---

**Note:** If the error data was generated by the creation task, the order transitions to the Failed state. No compensation tasks are created and the order must be corrected through an external amendment.

---

4. Process the redo and undo compensation tasks. This is applicable only to the manual redo and undo tasks. The user will only be able to see manual tasks that need to be redone and undone (assuming they have fallout privileges). But the system will still process compensation for automated tasks at the back end.
  - a. Redo tasks identify the data fields in error with an orange dot and describe the fallout error at the top of the task view.

---

**Note:** Fallout exceptions can be mapped to one or more error nodes, so it is possible to have multiple errors in a single task view.

---

Fix the errors, then click **Next/Update** to transition the task. After a redo task has been processed, it is removed from the Worklist.

- b. Undo tasks must be acknowledged in order to be rolled back. Open the task and click **Update**. Once an undo task has been acknowledged, it is removed from the Worklist.

The system allows multiple fallouts to be processed, but in sequence. After an order is in the Amending state due to fallout, further fallouts are prohibited until the order transitions out of the Amending state.

## Manually Amending Orders

You amend an order if you want to make changes to an in-flight order. An in-flight order is an order that is still in progress. In other words, you update an order that is not yet completed. You edit an order through the Task Editor. The amendment processing proceeds only if you make significant changes to the order. Otherwise, the system updates the order data and the order remains in the In Progress State, completing the amendment flow. The changes that you would want to make are defined during design time in Design Studio. Amendments to OSM orders can be submitted by an external order entry or CRM system, or they can be applied directly to the order using the Task web client interface.

---

**Note:** If the process of an order type/source is amendable, there should be no optional fields in the order when it is at the creation task. You must change the optional fields to required fields and set default values for the required fields.

---

To manually amend an order:

1. Locate the order to be amended from either the Worklist or the Query Results page.

2. Right-click the order and select **Amend Order**.

The Task Editor displays an editable version of the current order data.

3. Edit the order data as required and click **Submit**.

The system identifies all task instances that are affected by the changed order data. If the data changes are not significant (no compensation required), the system immediately updates the order data with the changes and no compensation is required. The order remains in the In Progress state and the amendment flow is complete.

4. On the Worklist page, click **Refresh**.

If the data changes are significant, amendment processing proceeds through the Order Change Management (OCM) cycle. The order transitions to the Amending state and the grace period is processed as specified. The system builds a compensation plan based on all affected task instances and creates redo or undo tasks as necessary.

5. Process the redo and undo tasks as described in "[Processing Redo and Undo Tasks](#)".

When all compensation tasks have been processed, the order transitions back to the In Progress state.

### Processing Redo and Undo Tasks

Once an OSM order's data has been updated by an amendment, the system initiates compensation. Each task being compensated has one or more order perspectives. The order perspectives describe the appearance of the order data before and after the amendment process. There are historical order perspectives and contemporary order perspectives.

You can access these perspectives from the Preview and Task Editor pages.

### Historical Order Perspective

The historical order perspective (HOP) shows order data as it was when the task being compensated was completed, (the outcome of the task when it was last completed).

### Contemporary Order Perspective

The contemporary order perspective (COP) shows order data that is current for the compensation task, which includes the latest values from the following:

- Last submitted data as filtered by the task's view. (Last submitted data is the order data as it was when the creation task of the order was submitted, including any changes from amendments.)
- Any additional changes from redo compensation tasks for this amendment.

### Redo Tasks

Figure 3–10 shows a redo compensation task that displays both order perspectives.

**Figure 3–10 Redo Compensation Task Displaying the Contemporary Order Perspective**

New Order Worklist Query Reporting Notifications Options

Preview FullPreview Process History Change State/Status Save Exception

▼ View B

Order ID : 121 Order Type : ammed demo Order Source : amend demo source Process : process1foramend Task: Task B (Redo)

Reference # : Priority: 5

Contemporary Perspective Historical Perspective

▼ Salary Details\*

basic	hra	total
2000	2000	4000



**Figure 3–11 Redo Compensation Task Displaying the Historical Order Perspective**

The screenshot displays a web application interface for managing orders. At the top, there is a navigation bar with buttons: New Order, Worklist, Query, Reporting, Notifications, and Options. Below this is a secondary bar with buttons: Preview, FullPreview, Process History, Change State/Status, Save, and Exception. The main content area is titled "View B" and shows the following details:

- Order ID : 121 | Order Type : ammed demo | Order Source : ammed demo source | Process : process1foramend | Task: Task B (Redo)
- Reference # :  | Priority: 5

Below the details, there are two tabs: "Contemporary Perspective" and "Historical Perspective". The "Historical Perspective" tab is selected, and a mouse cursor is pointing at it. Under the "Salary Details" section, there are three input fields:

basic	hra	total
<input type="text" value="1,000"/>	<input type="text" value="1,000"/>	<input type="text" value="1,000"/>

### Undo Tasks

You can use these pages compare data that has changed during amendment processing. You can also make further changes to the amended data using the **Contemporary Order Perspective** tab. The HOP is read-only and cannot be changed.

You transition through redo tasks as you would transition normal tasks. After a redo task has been processed, it is removed from the Worklist.

Figure 3–12 shows an undo compensation task that displays only the HOP:

**Figure 3–12 Undo Compensation Task Displaying the Historical Order Perspective**

The screenshot displays a web application interface for managing orders. At the top, there is a navigation bar with buttons: New Order, Worklist, Query, Reporting, Notifications, and Options. Below this is a secondary bar with buttons: Preview, FullPreview, Process History, and Exception. The main content area is titled "Task B" and shows the following details:

- Order ID : 123 | Order Type : ammed demo ammed demo source | Order Source : ammed demo ammed demo source | Process : process1foramend | Task: Task B (Undo)
- Reference # :  | Priority: 5

Below the details, there are two tabs: "Contemporary Perspective" and "Historical Perspective". The "Historical Perspective" tab is selected. Under the "Salary Details" section, there are three input fields:

basic	hra	total
<input type="text" value="500"/>	<input type="text" value="500"/>	<input type="text" value="1,000"/>

Below the salary details, there are two input fields:

name	Customer ID
<input type="text" value="Cust123"/>	<input type="text" value="123"/>

You must acknowledge a manual undo task in order to roll it back. You do this by clicking the **Update** button. After an undo task has been acknowledged, it is removed from the Worklist.

## About Notifications

Notifications are used to alert users or systems to processes, orders, or tasks that may be at risk or to events that occur in the system. Notifications can be sent to users or they may trigger an automation plug-in to perform work. You can configure notifications to be sent by email to user groups. By default, notifications appear in the Notifications page of the Task web client. When you assign users to workgroups using the Order Management web client Administration area, you can set up email notifications for users to notify them when certain conditions occur. For example, users belonging to a specific role may want to be notified that an order's due date is in five days. See *OSM Order Management Web Client User's Guide* for more information on these procedures.

When a notification condition occurs, it is sent either to a specific user or to all users with a specific role. You then acknowledge the notification and, if required, enter the remarks. If you are not logged in, notifications are held in the queue until you log in.

The Notifications page displays the notification instances for the OSM system. When a given notification condition is detected, each targeted user and workgroup is notified, and an entry is added to the notification list.

There are two basic types of notifications:

- Jeopardy notifications are based on rules that evaluate at regular intervals to identify processes or tasks in jeopardy. See the discussion about jeopardy notifications in *OSM Concepts* for more information.
- Event notifications are based on changes to task status, order milestones or task states, or order data. See the discussion about event notifications in *OSM Concepts* for more information.

See the Design Studio Help for additional information about designing notifications.

[Table 3–3](#) describes the Notifications page.

**Table 3–3 Notifications Page**

Column	Description
Notification Description	A description of the notification as defined in the OSM Administrator.
Notification Type	The type of notification: Polled or Transitional.
Priority	The priority of the notification from 1 to 255 (1 is the highest priority). Priority is available for Polled notifications only.
Notification Timestamp	The date and time that the notification occurred.
Order Creation Date	The date and time that the order was created.

**Table 3–3 (Cont.) Notifications Page**

Column	Description
<b>Expected Order Completion Date</b>	The date and time when the order is expected to be completed. This is calculated as follows: <ul style="list-style-type: none"> <li>■ If OSM receives the order after the expected start date, then the expected order completion date is the expected duration added to the order creation date.</li> <li>■ If OSM receives the order before the expected start date, or if it has no expected start date because it is a process-based order, then expected order completion date is the expected duration added to the expected start date.</li> </ul>
<b>Expected Duration</b>	The amount of time the order is expected to take to complete processing. The expected duration format is as follows: P[daysD] [T[hoursH] [minutesM] [secondsS]]
<b>Expected Start Date</b>	The date when the order is expected to start processing.
<b>Requested Delivery Date</b>	The date by which the customer requests the order to be delivered.
<b>Order ID</b>	The order ID generated by the system when the order is entered.
<b>Source</b>	Where the order originated. For example, client care, fax, etc.
<b>Type</b>	The type of order. For example, facility change, request for new line, etc.
<b>Process</b>	The name of the process.
<b>Ref. #</b>	An alphanumeric reference associated with the work order.
<b>Process Status</b>	The process status at the time of the notification.

When you open an order from the Notification page, OSM automatically selects one of the available query tasks assigned to the user's role. For example, if you are assigned to three different workgroups with three different query tasks assigned to each workgroup, the order is displayed in one of the three query tasks. The default is based on the notification timestamp.

By default, only the following columns are displayed in the Notifications page:

- Notification Description
- Notification Priority
- Notification Timestamp
- Notification Type

The other columns must be added through the Notification Preferences page. See ["About the Notification Preferences Page"](#) for more information.

## About the Notification Preferences Page

The Notification Preferences page is where you select the columns you want to be displayed in a notification. You can also specify the sort order of the columns.

[Table 3–4](#) describes the Notification Preferences page.

**Table 3–4 Notification Preferences Page**

Column	Description
Available Columns	This area shows the available notification list columns.
Displayed Columns	This area shows the displayed notification list columns.
Sort Order	This area lets you select an ascending or a descending sort order. You can also specify the first and second column that you want to be displayed in the notification list.

## Acknowledging Notifications

When you acknowledge the notification, OSM clears and resets the notification to continue evaluating at the next selected time period.

---

**Note:** No further notifications for the same process, order, task, or event will be received until the present notification is acknowledged.

---

You can acknowledge a notification message by clicking the notification URL in your email message. If you do not receive notification messages by email, see your System Administrator.

To acknowledge a notification:

1. In the Notifications page, select **Acknowledgement** and select the notification.  
The Acknowledgement page is displayed.
2. Enter a message and then click **Update**.

---

**Note:** To avoid acknowledging a notification by another user in the workgroup, update your view frequently by clicking **Refresh**.

---

You can add a message to a notification only while the Notifications page is selected. After you add and save a message, it cannot be modified or deleted. All users can view the messages that appear in the Acknowledgement(s) page along with the login name, the name of the person entering the remark, the date and time entered, the description, and whether it has been reset or cleared.

To add a notification message:

1. In the Notifications page, select **Acknowledgement** and then click the ellipsis button beside the notification to which you want to add a message.  
Alternatively, right-click the notification and select **Add Acknowledgement**.
2. Enter your message in the Acknowledgement page and click **Update**.

## Viewing Notification Messages

A notification message displays the name of the user who created it, the date it was entered, the notification description, and whether it has been reset or cleared.

To view a notification message, select **Notification History** in the notification page, and then click the ellipsis button beside the notification.

Alternatively, right-click the notification and select **View Notification History**.

---

## Viewing Orders

This chapter describes how to query and view orders, order history, and order report summaries in the Oracle Communications Order and Service Management (OSM) Task web client.

### Finding Orders

When you log into the Task web client and click **Query** for the first time, the Query Preferences page is displayed with the system default settings. Similar to worklist preferences, you can define queries to search for orders based on specific criteria. You can query for any order in the system, including completed orders. You can also save your queries with names and reuse them later. Once you save a query, clicking **Query** brings you to the Query Results page. To see the Query Preferences page from the Query Results page, click **Edit Query**.

### About the Query Preferences Page

Use the Query Preferences page to set the criteria for a search for orders. Orders can be queried regardless of whether they are in your worklist.

In addition to specifying order search criteria, you can also select the list of columns that you want to be displayed as well as the sort order and query filters. Queries that you save are available only to you.

The Query Preferences page has the following areas:

- [About the Query Preferences Area](#)
- [About the Query Filters Area](#)

#### About the Query Preferences Area

The Query Preferences area is where you select the columns you want to display. You can also specify the sort order of the columns. See "[Setting Query Preferences](#)" for more information.

[Table 4–1](#) describes the Query Preferences area. In lists that allow multiple selections, use the Ctrl key to select more than one value.

**Table 4–1** Query Preferences Area

Column	Description
Available Columns	This area shows the available query list columns.
Displayed Columns	This area shows the displayed query list columns.

**Table 4–1 (Cont.) Query Preferences Area**

Column	Description
Sort Order	This area lets you select up to five ascending or descending sort orders.

### About the Query Filters Area

The Query Filters area lets you filter and search the orders by specifying a query criteria. The orders that match the query search criteria are then displayed in the Query Results page. In addition to the filters listed in the Query Filters area, a section of filters based on the cartridge-defined flexible headers is displayed under the Details heading. See ["Setting Query Filters"](#) for more information.

[Table 4–2](#) describes the Query Filters area.

**Table 4–2 Query Filters Area**

Column	Description
Order ID	Unique system-generated order identifier. In the <b>from</b> and <b>to</b> fields, enter a range of order IDs on which you want to query. Only integers and wildcards are valid.
Ref. #	The reference number of the order.
Namespace	Namespace of the order.
Namespace/Version	Namespace and version of the order.
Process	The order process.
Type Order	The action associate to the order, such as Add, Delete, and so on.
Order Type	The target order type, such as OsmCustomerOMExampleOrder, OsmServiceOMExampleOrder, and so on.
Source	Source of the order (typically the same as the order type).
Task Name	The order task name.
Task States	All the built-in task states and the user-defined states are listed here. The built-in states are Accepted, Assigned, Suspended, and Received.
User	The name of the user.
Process Status	All the built-in and user-defined statuses are listed here. The built-in statuses are Back, Cancel, Delete, False, Finish, N/A, Next, Submit, and True.
Priority	The priority of the order. In the <b>from</b> and <b>to</b> fields, enter a range of values from 0 (minimum) to 9 (maximum).

Table 4–2 (Cont.) Query Filters Area

Column	Description
Expected Duration	<p>The amount of time the order is expected to take to complete processing. Use the following search string format for a query:</p> <p><b>P</b>days<b>D</b>T<b>hours</b><b>H</b>minutes<b>M</b>seconds<b>S</b></p> <p>When specifying hours, minutes, or seconds, you must use the <b>T</b> as part of the value. For example:</p> <ul style="list-style-type: none"> <li>PT8H - eight hours.</li> <li>PT8H4M - eight hours, four minutes.</li> <li>PT4M - four minutes.</li> <li>PT8H6S - eight hours, six seconds.</li> <li>P9DT8H - nine days, eight hours.</li> <li>P9D - nine days (no hours/minutes/seconds, so no <b>T</b> is required).</li> <li>PT0S, P0D, PT0H0M - zero duration.</li> </ul> <p>The following are not valid:</p> <ul style="list-style-type: none"> <li>P8H - intended to be eight hours, but <b>T</b> is missing.</li> <li>P9D8H - intended to be nine days, eight hours, but <b>T</b> is missing.</li> </ul> <p>In the <b>from</b> and <b>to</b> fields, enter a duration range on which you want to query</p>
Expected Start Date	The date when the order is expected to start processing. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
Requested Delivery Date	The date by which the customer requests delivery of the order.
Order Creation Date	The date when the order was created. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
Started	The date the task was started. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
Completed Date	The date when the order was completed. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query (only available in Query).
Expected Order Completion Date	<p>The date when the order is expected to be completed. This is calculated as follows:</p> <ul style="list-style-type: none"> <li>If OSM receives the order after the expected start date, the expected order completion date is the expected duration added to the order creation date.</li> <li>If OSM receives the order before the expected start date, or if it has no expected start date because it is a process-based order, the expected order completion date is the expected duration added to the expected start date.</li> </ul> <p>In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.</p>
Expected Task Completion Date	The date when the task is expected to be completed. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
Order State	The state of the order. Available values are Aborted, Waiting for Revision, Waiting, Amending, Cancelled, Cancelling, Completed, Failed, In Progress, Not Started, and Suspended.
Target Order State	The target state of the order. Available values are Aborted, Waiting for Revision, Amending, Cancelled, Cancelling, Completed, Failed, In Progress, Not Started, and Suspended.

**Table 4–2 (Cont.) Query Filters Area**

Column	Description
Execution Mode	The execution mode of the task. Available values are Do (In Amending), Do, Redo, Undo, Do in Fallout (In Amending), Do in Fallout, Redo in Fallout, and Undo in Fallout.
Expected Grace Period Completion	The date when the grace period is expected to be completed. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
Workgroups	The workgroups (roles) to which the user belongs.
Has Failure	Whether the order contains one or more tasks in a failed state. This may or may not be the current task.

## Setting Query Preferences

The Query Preferences page lets you define, edit, save, run, and delete queries. When you log into the Task web client and click **Query** for the first time, the Query Preferences page is displayed with the system default settings. Once you save a query, clicking **Query** brings you to the Query Results page. To see the Query Preferences page from the Query Results page, click **Edit Query**.

The Query Preferences page contains both preference and filter settings.

### Setting Preferences

You select the columns you want to display in your query results by selecting them from the **Available Columns** list and moving them into the **Displayed Columns** list. By default, all columns are selected. If you do not want to display a particular column in the query list, select it from the **Displayed Columns** list and move it to the **Available Columns** list. To change the order of the columns, use the up and down arrow buttons.

You can also change the way in which columns are sorted by specifying a primary and secondary sort order. By default, **1st Sort Order** is set to **Ascending** and **2nd Sort Order** is set to **Descending**.

### Setting Query Filters

Query filters allow you to control the volume and type of orders that you see in the **Query Results** list. You can query on one or more filters, depending on how specific you want your query to be.

Depending on the query, you may have more than one match per order. To avoid multiple rows per order, **Single Row Per Order** is selected by default. If you select **Single Row Per Task Instance**, one row is shown for each task instance the order is on.

The remaining filters are based on order information contained in your orders. This includes order headers, which are the fixed default columns defined for any order, and order details, which are the customized columns (flexible headers) defined by your designer in Design Studio.



---

**Note:** Flexible headers appear as lookup lists or as range fields. If flexible headers are enumerated by the designer, they appear as lookup lists. If they are not enumerated, they appear as range fields.

When entering data into range fields, either enter data only in the **from** field or enter data in both the **from** and **to** fields. Filling only the **from** field queries only that exact data; filling both the **from** and **to** fields queries the range entered.

See the Design Studio Help for more information about creating lookup lists and range fields.

---

### Prompt for Value and Defaults

For each query filter, you have the option to enable the **Prompt for Value** check box and provide a default value. Any query defined with prompt-for-value filters will prompt the user who runs it to enter a value for those filters. If you provide a default with the prompt-for-value filter, the default is displayed in the prompt-for-value input field at run time. The user can override this value by entering another value or by clearing the input field.

Figure 4–1 shows a sample query, “Prompt\_for\_value\_1,” which prompts the user for the **Order ID**, **Type**, and **Source**. The query could also contain default values (for example, for type and source), which the user could override.

**Figure 4–1 Sample Query Prompts**

The screenshot shows a web application interface for a query named "Query:PFV1". At the top, there is a navigation bar with buttons for "New Order", "Worklist", "Query", "Reporting", "Notifications", and "Options". Below this is a search bar with the text "Search". The main content area has a title "Query:PFV1" and a prompt "Please provide values for the following Query parameters:". Below the prompt, there are three filter fields: "Process Status" with a dropdown menu showing "(All)", "Priority" with "from" and "to" input fields, and "Expected Order Completion Date" with "from" and "to" input fields. There are also small icons next to the "to" fields. At the bottom, there is a "Details" section and another search bar with the text "Search".

### Creating a Query Definition

The first time you access the Query page, you are presented with either your last saved query (migrated from a previous release) or the system default. You can use either of these as a starting point when creating your first query.

To create a query:

1. Log in to the Task web client and click **Query**.  
 If your query from a previous release is available, you are directed to the Query Results page. Your query is displayed in the menu as **MyQuery**. Click the **Edit Query** link to continue.  
 If no preference is available, you are directed to the Query Preferences page with the system default loaded.
2. Set your preferences and filters as desired and click **Save As**.  
 A dialog box is displayed, prompting for the query name.
3. In the text box, enter a name (up to 50 characters) and click **OK**.  
 The named query is displayed in the menu as the selected item.
4. Click **Search**.  
 The Query Results page opens.  
 The **Query** list is based on the last executed query, which may or may not be the query you are working with on the Query Preferences page.
5. Select the newly created query from the menu.  
 The selected query is applied immediately to the query results.

## Editing a Query

To edit a query:

1. On the Query Results page, click **Edit Query**.  
 The Query Preferences page displays the selected query definition.
2. Change the settings as desired and do one of the following:
  - To update the currently selected definition (save your changes to the same query), click **Save**.
  - To save your changes to a new query, click **Save As**.  
 A dialog box is displayed, prompting for the query name. Enter the query name and click **OK**.
3. Click **Search**.  
 The Query Results page opens.  
 The **Query** list is based on the last executed query, which may or may not be the query you are working with on the Query Preferences page.
4. Select the query from the menu.  
 The selected query is applied immediately to the query results.

## Running a Query

To run a named query, do one of the following:

- Select the query from the menu on the Query Results page. The selected query definition is applied immediately to the results list. This is known as running a query from the database.

- Select the query from the menu on the Query Preferences page and click **Search**. The query results are based on the last executed query. This is known as running a query from memory, or cache.
- Click **Refresh** on the Query Results page. The results are based on the last executed query (from the database or from memory).

### One-Time Query

You can also define and run a query without saving it. To do so, define your query on the Query Preferences page and then click **Search**. The results are shown on the Query Results page. When you run a one-time query, the menu selection defaults to **<Please select a query>**.

## Deleting a Query

To delete a query:

1. On the Query Preferences page, select the query from the menu and click **Delete**.  
A dialog box is displayed, asking if you want to delete the current query.
2. Click **OK**.  
The query name is removed from the menu, and the list is repositioned to **<Please select a query>**.
3. Click **Search** to return to the Query Results page.

---

**Note:** If all named queries are deleted, the definition is reset to the system default.

---

## Viewing Histories

You view historical data related to processes and orders from the Process History page and the Data History page. The Process History page contains the dates, times, and all user information for an order as it goes through the process. The Data History page contains the history of each field in an particular order.

### Viewing Data History

To view the data history:

1. In the Worklist page, select **Editor**, then click the ellipsis button next to the order you wish to view.
2. In the Task editor, click the name of the view link (for example, **Initiate Order**).

All fields containing data history are displayed.

You can also view the data history of each individual field by clicking the field link, if available.

### Viewing Process History

To view the process history:

1. In the Worklist page, select **Editor**, then click the ellipsis button next to the order you wish to view.
2. In the Task editor, click **Process History**.

The Process History page defaults to a summary table of the order you selected. You can also view a detailed table, a pie chart, and a Gantt chart. You can also print or save the process history.

## Viewing Reports

You use the Reporting page to get summarized information on all orders and tasks in the OSM system. You can view the number of overdue orders, the oldest orders, the most recent orders, and the completed tasks for each order. See *OSM Reporting Interface Guide* for more information on building customized reports.

The order viewing options include viewing pending orders, volume of orders, completed order statistics, and completed task statistics. You can access these viewing options by clicking the **Reporting** link.

You must be assigned the reporting privileges to view the reports. For more information, see *OSM System Administrator's Guide*.

The Reporting page has the following tabs:

- Pending Orders
- Order Volume
- Completed Order Statistics
- Completed Task Statistics

## Viewing Pending Orders

The **Pending Orders** window lists orders waiting to be completed and are grouped by the following:

- **Responsibility:** Used to classify the tasks for reporting purposes. For example, certain tasks may be the responsibility of Customer Billing, Accounting, Administration, etc.
- **State:** The state of the task or tasks currently being executed. For example, Received, Completed, and Accepted.
- **Task:** An activity defined in the context of a process.

It displays the total number of pending orders, the number of overdue orders, and the oldest or most recent pending orders in OSM.

To limit the orders displayed in the **Pending Orders** window, you can filter the orders by order type and source.

Table 4–3 describes the **Pending Orders** window.

**Table 4–3 Pending Orders Window**

Field	Description
Namespace	Namespace of the order
Namespace/Version	Namespace and version of the order
Order Type	Type of the order
Order Source	Source of the order
Summarized By	The option on which the report should be summarized: Responsibility, State, or Task

To view pending orders:

1. Click **Reporting**.

The **Pending Orders** window is displayed.

2. If you are using namespaces, select the correct namespace from the **Namespace** list or from the **Namespace/Version** list.

**Namespace** shows all orders containing the specified namespace.

**Namespace/Version** displays all versions within a specific namespace.

3. From the **Order Type** list, select the order type.
4. From the **Order Source** list, select the order source.
5. From the **Summarized By** list, select the level.
6. Click **Find**.

## Viewing Order Volume

The **Order Volume** window provides a table or chart displaying the number of orders received and completed for a specified time period (such as hour, day, week, or month).

You can filter orders by order type and source and by choosing a specific time period.

[Table 4–4](#) describes the **Order Volume** window.

**Table 4–4 Order Volume Window**

Criteria	Description
<b>Namespace</b>	Namespace of the order
<b>Namespace/Version</b>	Namespace and version of the order
<b>Order Type</b>	Type of the order
<b>Order Source</b>	Source of the order
<b>From</b>	The date from which you want the order volume
<b>To</b>	The date until which you want the order volume
<b>Unit</b>	Specify the duration of the order volume: Hour, Day, Week, or Month
<b>Result Format</b>	Select the result format: Chart or Table

To view order volume:

1. Click **Reporting** and then click **Order Volume**.

The **Order Volume** window is displayed.

2. If you are using namespaces, select the correct namespace from the **Namespace** list or from the **Namespace/Version** list.

**Namespace** shows all orders containing the specified namespace.

**Namespace/Version** displays all versions within a specific namespace.

3. Do any of the following:
  - From the **Order Type** list, select the order type.
  - From the **Order Source** list, select the order source.
  - From the **Unit** list, select **Hour**, **Week**, **Day**, or **Month**.

- From the **Result Format** list, select **Table** or **Chart**.
  - In the **From** and **To** fields, set the time period.
4. Click **Find**.

## Viewing Statistics for Completed Orders

The **Completed Order Statistics** window provides information on the duration of orders. You can filter completed orders by the order type and source and by choosing a specific time period.

[Table 4–5](#) describes the **Completed Order Statistics** window.

**Table 4–5 Completed Order Statistics Window**

Criteria	Description
Namespace	Namespace of the order
Namespace/Version	Namespace and version of the order
Order Type	Type of the order
Order Source	Source of the order
From	The date from which you want the completed order statistics
To	The date until which you want the completed order statistics

To view completed order statistics:

1. Click **Reporting** and then click **Completed Order Statistics**.  
The **Completed Order Statistics** window is displayed.
2. If you are using namespaces, select the correct namespace from the **Namespace** list or from the **Namespace/Version** list.  
**Namespace** shows all orders containing the specified namespace.  
**Namespace/Version** displays all versions within a specific namespace.
3. Do any of the following:
  - From the **Order Type** list, select the order type.
  - From the **Order Source** list, select the order source.
  - In the **From** and **To** fields, set the time period.
4. Click **Find**.

## Viewing Statistics for Completed Tasks

The **Completed Task Statistics** window provides information on the duration of a task. You can filter completed tasks by responsibility, by task, and by choosing a specific time period.

[Table 4–6](#) describes the **Completed Task Statistics** window.

**Table 4–6 Completed Task Statistics Window**

Criteria	Description
Namespace	Namespace of the order
Namespace/Version	Namespace and version of the order

**Table 4–6 (Cont.) Completed Task Statistics Window**

Criteria	Description
<b>Responsibility</b>	Select either <b>All</b> or <b>System</b>
<b>Task</b>	The completed task for which you want the statistics
<b>From</b>	The date from which you want the completed task statistics
<b>To</b>	The date until which you want the completed task statistics

To view completed task statistics:

1. Click **Reporting** and then click **Completed Task Statistics**.  
The Completed Task Statistics page is displayed.
2. If you are using namespaces, select the correct namespace from the **Namespace** list or from the **Namespace/Version** list.  
**Namespace** shows all orders containing the specified namespace.  
**Namespace/Version** displays all versions within a specific namespace.
3. Do any of the following:
  - From the **Responsibility** list, select the responsibility.
  - From the **Task** list, select the task.
  - In the **From** and **To** fields, set the time period.
4. Click **Find**.





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# Customizing the Task Web Client

This document describes how to customize the Oracle Communications Order and Service Management (OSM) Task web client.

See "[Setting Query Preferences](#)" to customize queries.

## Customizing Your Display

Use the Preferences page to define the way information is displayed on your screen. You can find the Preferences page in the Worklist, Notifications, and Query pages.

[Figure 5–1](#) shows the Worklist Preferences page.

**Figure 5–1 Worklist Preferences Page**

**Worklist Preferences:untitled**

**Worklist Columns**

**Available Columns**

- Execution Mode
- Expected Duration
- Expected Grace Period Completion
- Expected Order Completion Date
- Expected Start Date
- Expected Task Completion Date
- Has Failure

**Displayed Columns**

- Order ID
- Source
- Order State
- Order Type
- Priority
- Process
- Ref. #

**Sort Order**

1st (Default) [v]  
 2nd (None) [v]  
 3rd (None) [v]  
 4th (None) [v]  
 5th (None) [v]

Ascending Descending  
 Ascending Descending  
 Ascending Descending  
 Ascending Descending  
 Ascending Descending

**Worklist Filter**

**Execution Modes**

- (All)
- Do (In Amending)
- Do
- Do in Fallout (In Amending)
- Do in Fallout

**Order States**

- (All)
- Aborted
- Amending
- Cancelled
- Cancelling

**Task States**

- (All)
- Accepted by current user
- Assigned to current user
- Others
- Received

**Tasks**

- (All)
- BaseTask
- CheckFailureThreshold
- Enter Account Information
- Enter Payment Information

**Order Details**

**Field**

1st (Clear) [v]  
 2nd (Clear) [v]  
 3rd (Clear) [v]

---

**Note:** See "[Viewing Orders](#)" for more information on creating and saving preferences.

---

## Sorting Information

When OSM first displays the Worklist page, it sorts the orders by task state.

You can change the way in which these columns are sorted by specifying sort criteria. You do this from the Worklist Preferences, Notifications Preferences, and Query Preferences pages.

To set the sort order:

1. From either the Worklist, Notifications, or Query page, open the Preferences page. (See [Figure 5–1](#) for an illustration of the Preferences page from the worklist.)

2. Select the sort order you want by using the fields in the Sort Order section. For each field you want to use, select a column name from the list and then select **Ascending** or **Descending**.

You do not need to select a column name for all of the available fields.

You can revert the sorted information to the default order by selecting **(Default)** from the **Sort Order** menu.

To temporarily sort on a column:

Click the link at the top of the column on which you want to sort.

You can sort on every column. When you click to sort the first time, the Worklist is sorted in ascending order of the values in that column. When you click on the same column link again, it is sorted in descending order.

## Changing the Colors of States

You can change the background and text colors used to represent the different states of orders in the Worklist, Query, and Change Task/Status pages.

To change the color of the order state:

1. Click **Options**.
2. On the Options window, select a text and background color from the **Text** and **Background** menus for a particular order/task state.
3. Repeat step 2 for each order state.
4. Click **Update**.

## Displaying, Hiding, and Reordering Columns

Using the Preferences option, you can select the columns you want to display in the Worklist, Query, and Notifications pages and the order in which you want them to appear. If you remove all columns from the **Displayed Columns** list, the default columns still appear in the Worklist.

To display, hide, or reorder columns:

1. In the Worklist page, click **Preferences**.
2. Do any of the following:
  - To display a column, in the Worklist Preferences page, select a column from the **Available Columns** list and click the right arrow button to move it into the **Displayed Columns** list.
  - To hide a column, select a column from the **Displayed Columns** list and click the left arrow button to move it into the **Available Columns** list.
  - To change the order of columns, select a column name from the **Displayed Columns** list and use the up and down arrow buttons to place it in the position.
3. Click **Save As** to name the preference and save it to the database.

See ["Setting Worklist Preferences"](#) for more information on setting worklist preferences.

## Customizing the Worklist

When you log into the Task web client for the first time, OSM displays orders in the Worklist based on your last saved preference or, if no preference exists, the system default.

You can customize the Worklist to display the information you want to see by defining and saving your own preferences.

### Setting Worklist Preferences

The Worklist Preferences page lets you define, edit, save, and delete Worklist preferences. To access this page, click the **Edit Preference** link on the Worklist page.

The Worklist preferences page has the following areas:

- [About the Worklist Columns Area](#)
- [About the Worklist Filters Area](#)
- [About the Order Details Area](#)

#### About the Worklist Columns Area

[Table 5–1](#) describes the **Worklist Columns** area.

**Table 5–1 Worklist Columns Area**

Column	Description
Available Columns	This area shows the available query list columns. See <a href="#">Table 5–2</a> for more information about the columns in this list.
Displayed Columns	This area shows the displayed query list columns.
Sort Order	In this area, you can change the way in which columns are sorted by specifying a primary and secondary sort criteria. By default, the 1st Sort Order is set to <b>Ascending</b> and the 2nd Sort Order is set to <b>Descending</b> .

[Table 5–2](#) describes the columns in the **Available Columns** list.

**Table 5–2 Available Columns List**

Column	Description
Order ID	Unique system-generated order identifier. In the <b>from</b> and <b>to</b> fields, enter a range of order IDs on which you want to query. Only integers and wildcards are valid.
Ref. #	The reference number of the order.
Namespace	Namespace of the order.
Namespace/Version	Namespace and version of the order.
Process	The order process.
Type Order	The action associate to the order, such as Add, Delete, and so on.
Order Type	The target order type, such as OsmCustomerOMExampleOrder, OsmServiceOMExampleOrder, and so on.
Source	Source of the order (typically the same as the order type).
Task Name	The order task name.

**Table 5–2 (Cont.) Available Columns List**

Column	Description
<b>Task States</b>	All the built-in task states and the user-defined states are listed here. The built-in states are Accepted, Assigned, Suspended, and Received.
<b>User</b>	The name of the user.
<b>Process Status</b>	All the built-in and user-defined statuses are listed here. The built-in statuses are Back, Cancel, Delete, False, Finish, N/A, Next, Submit, and True.
<b>Priority</b>	The priority of the order. In the <b>from</b> and <b>to</b> fields, enter a range of values from 0 (minimum) to 9 (maximum).
<b>Expected Duration</b>	<p>The amount of time the order is expected to take to complete processing. Use the following search string format for a query:</p> <p><b>P</b>days<b>D</b>T<b>hours</b><b>H</b>minutes<b>M</b>seconds<b>S</b></p> <p>When specifying hours, minutes, or seconds, you must use the <b>T</b> as part of the value. For example:</p> <ul style="list-style-type: none"> <li>■ PT8H - eight hours.</li> <li>■ PT8H4M - eight hours, four minutes.</li> <li>■ PT4M - four minutes.</li> <li>■ PT8H6S - eight hours, six seconds.</li> <li>■ P9DT8H - nine days, eight hours.</li> <li>■ P9D - nine days (no hours/minutes/seconds, so no <b>T</b> is required).</li> <li>■ PT0S, P0D, PT0H0M - zero duration.</li> </ul> <p>The following are not valid:</p> <ul style="list-style-type: none"> <li>■ P8H - intended to be eight hours, but <b>T</b> is missing.</li> <li>■ P9D8H - intended to be nine days, eight hours, but <b>T</b> is missing.</li> </ul> <p>In the <b>from</b> and <b>to</b> fields, enter a duration range on which you want to query</p>
<b>Expected Start Date</b>	The date when the order is expected to start processing. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
<b>Requested Delivery Date</b>	The date by which the customer requests delivery of the order.
<b>Order Creation Date</b>	The date when the order was created. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
<b>Started</b>	The date the task was started. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
<b>Completed Date</b>	The date when the order was completed. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query (only available in Query).
<b>Expected Order Completion Date</b>	<p>The date when the order is expected to be completed. This is calculated as follows:</p> <ul style="list-style-type: none"> <li>■ If OSM receives the order after the expected start date, the expected order completion date is the expected duration added to the order creation date.</li> <li>■ If OSM receives the order before the expected start date, or if it has no expected start date because it is a process-based order, the expected order completion date is the expected duration added to the expected start date.</li> </ul> <p>In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.</p>

**Table 5–2 (Cont.) Available Columns List**

Column	Description
<b>Expected Task Completion Date</b>	The date when the task is expected to be completed. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
<b>Order State</b>	The state of the order. Available values are Aborted, Waiting for Revision, Waiting, Amending, Cancelled, Cancelling, Completed, Failed, In Progress, Not Started, and Suspended.
<b>Target Order State</b>	The target state of the order. Available values are Aborted, Waiting for Revision, Amending, Cancelled, Cancelling, Completed, Failed, In Progress, Not Started, and Suspended.
<b>Execution Mode</b>	The execution mode of the task. Available values are Do (In Amending), Do, Redo, Undo, Do in Fallout (In Amending), Do in Fallout, Redo in Fallout, and Undo in Fallout.
<b>Expected Grace Period Completion</b>	The date when the grace period is expected to be completed. In the <b>from</b> and <b>to</b> calendar fields, enter a date range on which you want to query.
<b>Workgroups</b>	The workgroup (role) to which the user belongs.
<b>Has Failure</b>	Whether the order contains one or more tasks in a failed state. This may or may not be the current task.

### About the Worklist Filters Area

In the **Worklist Filters** area, you can control the number of orders that appear in the Worklist by filtering on one or more criteria. By default, all execution modes, order states, task states, and task descriptions are selected.

Figure 5–2 shows the Worklist Filters area.

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**Note:** When the worklist is filtered on the basis of “Namespace” only, orders of the current version are displayed.

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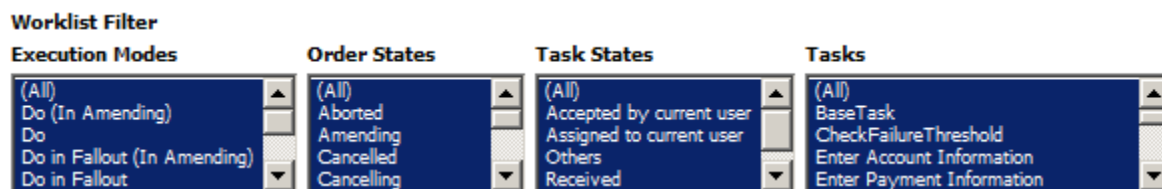
**Figure 5–2 Worklist Filters Area**

Table 5–3 describes the **Worklist Filters** area.

**Table 5–3 Worklist Filters Area**

Column	Description
<b>Execution Modes</b>	The Execution Modes filter lets you display tasks based on one or more execution modes. The execution modes are: (All), Do (In Amending), Do, Redo, Undo, Do in Fallout (In Amending), Do in Fallout, Redo in Fallout, and Undo in Fallout.
<b>Order States</b>	The Order States filter lets you display orders associated with one or more states. The order states are: (All), Aborted, Amending, Cancelled, Cancelling, Failed, In Progress, Not Started, Suspended, Waiting, and Waiting for Revision.

**Table 5–3 (Cont.) Worklist Filters Area**

Column	Description
Task States	The Task States filter lets you display tasks associated with one or more states. The task states are: (All), Accepted by current user, Assigned to current user, Others, Received, and Suspended.
Tasks	The Tasks filter lets you display one or more tasks based on the task description.

### About the Order Details Area

The **Order Details** area has the **Field** list that you use to display orders associated with a specific column name and, in some cases, other specific conditions and values. For example, if you select Process Status from the Field list, you must select a status such as True, False, Next, Back, and so on, from the Condition Value list. By default, no fields are selected (Clear).

Table 5–4 describes the field filtering options available in the **Order Details** area.

**Table 5–4 Order Details Area**

Filtering Option	Description
Field	The list that contains the default and user-defined columns.
Condition	<p>The Condition option is only available for certain columns in the field list.</p> <p>You have the option of searching for orders equal to a value or between two values:</p> <ul style="list-style-type: none"> <li>▪ If you select <b>=</b>, the <b>Value</b> field is enabled.</li> <li>▪ If you select <b>between</b>, both the <b>Upper Value</b> and <b>Lower Value</b> fields are enabled.</li> </ul>
Lower Value	The lower value of the condition for the selected field.
Upper Value	The upper value of the condition for the selected field.

For text fields and **Order ID** and **Reference #** column headers, you can use wildcard symbols for the **=** condition field to represent any number of unknown characters. Use **\*** to search for any character or group of characters, and **?** to search for any single character.

When you filter on a phone field, you must use numeric characters only.

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**Note:** If you have a large number of tasks in your worklist, and if you want to show orders associated with most of the tasks, instead of making multiple clicks, select the first task displayed in the list, then scroll to the bottom, press and hold the **Shift** key, and then click the last task in the list. This highlights all of the tasks. Next, press and hold the **Ctrl** key, and then click the tasks you want to remove from the list. This deselects the unwanted tasks.

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## Defining Worklist Preferences

The first time you access the Worklist, you are presented with either your last saved preference (from a previous release), or the system default.

To define a worklist preference:

1. Log in to the Task web client and navigate to the Worklist page (it may appear automatically after login).  
If your last saved preference is available, it is displayed in the menu as **MyWorklist**; otherwise, the menu does not appear.
2. On the Worklist page, click **Edit Preference**.  
The Worklist Preferences page is displayed. If you are working with **MyWorklist**, the settings for that preference are loaded. If no preference is available, the system default, named **untitled** is loaded.
3. Modify your settings as desired and click **Save As**.  
A dialog box is displayed prompting for the preference name.
4. In the text box, type a name (up to 50 characters) and click **OK**.  
The named preference is now the current Worklist Preference and is displayed in the menu as the selected item.
5. Click **Worklist** to return to the Worklist page.  
If the newly created preference is your only preference, it is displayed as the selected item in the menu. In this case, click **Refresh** to apply it to the Worklist. If you have more than one preference saved, however, you may need to select the newly created preference from the list to apply it.

## Selecting a Worklist Preference

You can select a Worklist preference from either the Worklist or the Worklist Preferences page.

- **Worklist:** When you select a preference from the menu on the Worklist page, it is applied immediately to the Worklist.
- **Worklist Preferences:** When you select a preference from the menu on the Worklist Preferences page, the settings for that preference are loaded. The preference that you select on this page is not automatically applied when you return to the Worklist.

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**Note:** The current worklist preference is the last preference you applied to the Worklist, which may or may not be the preference you are working with on the Worklist Preferences page. Remember to always select the preference you want to apply to the Worklist from the Worklist page.

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## Editing a Worklist Preference

You can edit a worklist preference by selecting it from the Worklist and clicking the **Edit Preference** link, or you can select and edit it directly from the Worklist Preferences page. Use the following procedure when selecting a preference from the Worklist.

To edit a worklist preference:

1. On the Worklist page, select the preference from the menu and click **Edit Preference**.  
The Worklist Preferences page displays the settings for the selected preference.
2. Change the settings as desired and then do one of the following:



- Click **Save** to save your changes to an existing preference
  - Click **Save As** to save your changes to a new preference
3. If you chose **Save As**, a dialog box is displayed prompting for the preference name. Type the preference name and click **OK**.  
The newly created or saved preference name is displayed as the selected item in the menu.
  4. Click **Worklist** to return to the Worklist page.
  5. If the preference you edited is already selected, click **Refresh** to apply your most recent changes; otherwise, select the preference you want to apply to the Worklist.

## Deleting a Worklist Preference

You can delete worklist preferences that are redundant or have become obsolete.

To delete a worklist preference:

1. On the Worklist Preferences page, select the preference from the menu and click **Delete**.

A dialog box is displayed asking if you want to delete the current preference.

2. Click **OK**.

The preference name is removed from the list.

3. Click **Worklist** to return to worklist.

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**Note:** If all named preferences are deleted, the system reverts to the default preference.

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## Creating a New (Untitled) Worklist Preference

When you click the **New** button on the Worklist Preferences page, the system creates a new untitled preference which contains the default settings. This provides an alternate way to create preferences, which are based on the default rather than on modifying existing preferences.

To create a new worklist preference:

1. On the Worklist Preferences page, click **New**.

The preference named untitled is displayed in the menu and the default preference settings are loaded.

2. Modify any settings as desired and click **Save As**.

A dialog box is displayed prompting for the preference name.

3. In the text box, enter a name, up to 50 characters, and click **OK**.

The named preference is displayed in the menu as the selected item.

4. Click **Worklist** to return to the Worklist page.
5. Select the newly created preference from the menu to apply it to the worklist.

## Customizing User-Specific Settings

The Options page lets you customize the user-specific settings. You can configure settings such as your email address, time zone, appearance of the login screen, the default action, and the color of the order and task. See "[Customizing the Task Web Client](#)" for more information.

Figure 5–3 shows the Options page.

**Figure 5–3 Options Page**

Order/Task State Color:		
	Text	Background
My Accepted	Black	White
My Assigned	Black	White
Received	Black	White
Suspended	Black	White
Others	Black	White
Completed	Black	White

Table 5–5 describes the Options page.

**Table 5–5 Options Page**

Column	Description
User Email Address	Set your email account to receive notifications.
Time Zone for Dates	Select your time zone.
Login Screen	Change the initial window displayed by the OSM system when you log in.
Default Action	Select the action option to be selected by default when opening the Worklist, Query, and Notification windows.
Order/Task State Color	Change the text and text background colors to differentiate orders at different task states.