# VIRTUAL FRONT OFFICE USER GUIDE

Frontier Wholesale

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# Introduction to Virtual Front Office (VFO)

VFO is a gateway between service/network providers.  The application is accessible via a web-based Graphical User Interface (GUI), in addition to the following features/functionality:

- Flexible and automatic validation of Access Service Requests, Local Service Requests and Trouble Reports.

- Storage and management of all service requests submitted, and the subsequent notifications received.

- Secure and efficient business interactions between the companies.

## VFO – Exchange Path Connection

To understand VFO, it is helpful to understand how it works with the Exchange Path application.

Exchange Path enables real-time data transfer with other trading partners.  Exchange Path uses the following Transaction and Message Formats:

- Local - EDI, XML
- Access – UOM/XML
- Trouble Administration – XML

Exchange Path uses the following Transmission Protocols:

- Interactive Agent
- HTTP

The process begins with the end user populating the VFO GUI, followed by the below list of activities:

1. VFO creates an XML based on the values entered in the VFO GUI.

2. The XML is sent to Exchange Path where the XML is compared against the Trading Partner's Business Rules.

3. If no rules are violated, the XML is translated into the Trading Partner's preferred format.

4. Exchange Path transfers the message to the Trading Partner.

5. The Trading Partner checks the message against their system.

6. The Trading Partner transmits the response-message to Exchange Path.

7. Exchange Path translates the message back into XML and then sends that XML back to VFO and updates the order's status.

## What are the Benefits of VFO?

High quality, cost-effective interactions between telecommunications providers can be attained through a high degree of mechanization. However, direct interfaces between the OSS of various providers are costly and create opportunities for insecure handling of critical business information.

VFO provides a secure gateway for handling these interactions and helps to realize the following benefits:

- Achieve cost-effectiveness by handling requests as part of a mainstream operations flow (i.e., automated flow through) instead of a manual effort.

- Facilitates interactions between associated communications customers and providers via integration into existing/evolving operations systems architectures.

- Improves time to service by minimizing manual efforts and the errors associated with manual processing.

- Maintains a historical record of Orders processed.

- Meets the transmission protocol requirements.

- Performs Order functions over a user-friendly, completely web-based interface.

- Provides the ability to validate transaction data before submission to the Trading Partners; thus reducing costs to manage fall-out.

## VFO General Information

## Audience

The primary users of this guide will be the provisioning specialists or users whose responsibilities include provisioning resources from outside sources.  It is assumed that the users of this manual are knowledgeable about the telecommunications industry as well as efficient provisioning practices.

## Conventions

This manual is organized as follows.

- Buttons and links that you click will be **bold**.

- Windows will be displayed as screen shots.

- Paths are represented by the '>' key.  For example, Start > Programs > Microsoft Word.  This path represents the steps followed to use certain functions within the application.

The examples used in this guide are fictitious.  Any similarity to actual data is merely coincidental.  The sample data does not represent proprietary data

from any other company.  Furthermore, the screen shots used in this document are not specific to any industry version.

## Purpose

This manual is intended to provide methods of processing and maintaining orders.  Specifically, this manual explains how to:

- Create and manage Service Requests

- Create and manage Service Order templates

- Perform tasks in the Service Ordering process

- The VFO User Guide is designed to act as a tool to provide a systematic process for conducting daily tasks.

# VFO Topic Overview

This guide is intended to provide methods of processing and maintaining orders.  Specifically, this electronic guide explains how to:

Get Started in VFO - In this section you will learn how to log on to the application, change your password, work with the home page transaction list and use the action icons to initiate commands.

Access PreOrder Search and Response - This section covers creating Location, Ethernet, and CFA Inquiries, printing and saving responses, and searching for saved responses.

Create and Manage Outgoing Access Orders - In this section you will learn all the functions available for Access Order requests, from creating, validating, and submitting orders to searching, supplementing, viewing order histories, and creating manual responses.

Work with Access Order Templates - This section reviews how to create, search, and apply templates to access orders.

Create and Manage Incoming Access Orders - In this section, you will learn how to respond to order requests.  It covers starting a response transaction, saving, validating, submitting, and searching for the response.

Local PreOrder Search and Response - This section reviews the general process for creating, submitting, printing, and search for PreOrder transactions.

Create and Manage Outgoing Local Orders - In this section, you will learn how to create local service requests, validate the order against the trading partner's business rules, submit orders and supplemented orders, view the order responses, and history, just name a few.

Work with Local Order Templates - This section reviews how to create, search, and apply templates to local orders.

Create and Manage Incoming Local Orders - In this section, you will learn how to respond to order requests.  It covers starting a response transaction, saving, validating, submitting, and searching for the response.

Trouble Administration - In this section, you will learn how to create a trouble ticket request, query the progress, and search for previous trouble tickets submitted.  This section also reviews how to submit Mechanized Loop Tests (MLT) and late bond verbal tickets to automated requests.

To learn more about the Virtual Front Office application, go to the Introduction to Virtual Front Office section of the Guide.

# Getting Started with VFO

VFO is a web-based application that runs on Google Chrome and Microsoft Edge; therefore, the user must open a supported Web browser to access the application.

(If necessary, consult the browser's User's Manual for the browser's setup and operating procedures.)

When the browser opens, enter the following in the Address line:

https://vfo.frontier.com/

## Login Procedure

Use the following procedure to log into VFO.

1. Browse to the VFO location by entering the following address in the Address field:
https://vfo.frontier.com/
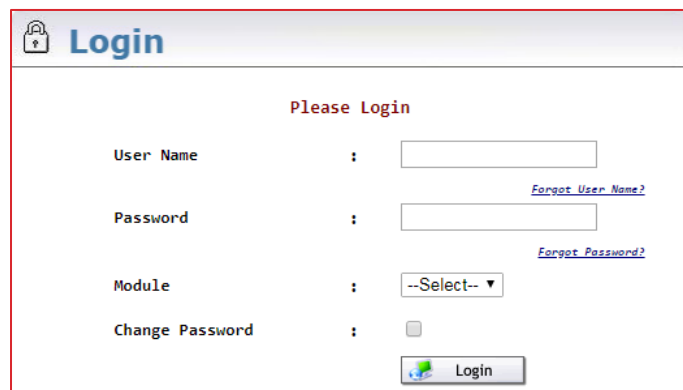


**Figure 1: Login page**

2. Enter a valid name in the User Name field.

3. Enter a valid password in the Password field.

4. Click the drop-down arrow in the Module field.

5. Select the desired Module.

6. Click the **Login** button.

NOTE: Use the User Name and Password provided by the company's System Administrator.  You will be forced to reset any password created by the System Administrator.

## Change Password

Use the following procedure to change the VFO Login password.

1. Browse to the location of VFO.

2. Enter a valid name in the User Name field.

3. Enter a valid password in the Password field.

4. Use the User Name and Password provided by company's System Administrator.

5. Click the dropdown arrow in the Module field.

6. Select the desired Module.

7. Check the Change Password checkbox.

8. Click the **Login** button.



**Figure 2: Change password page**

9. Enter the old password into the Old Password field.

10. Enter the new password into the New Password field.

11. Reenter the new password into the Confirm New Password field. The 'Password Rules' link mentions the criteria for choosing a new password.

12. Click the Update Password button.

13. Log in using the new password.

## Password Rules

The password rules are intended to maintain the system security by prompting users to provide strong passwords and use them appropriately.
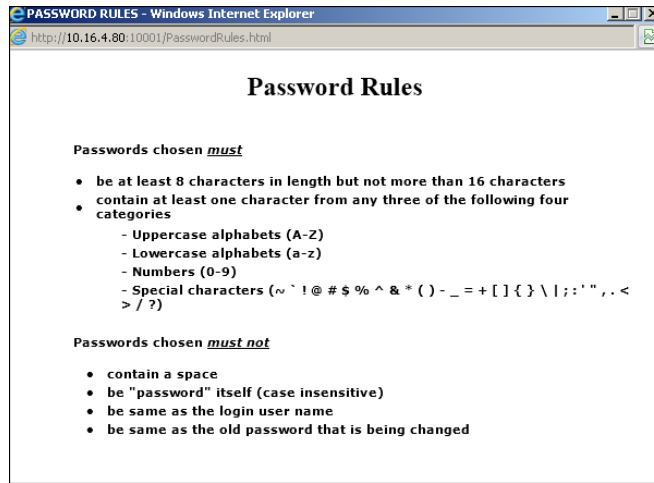


**Figure 3: Password Rules**

## First Time Logging In – Security Questions

The first time you log into VFO, you will be asked to reset your password, answer three security questions of your choice, and provide or confirm your email address.  You will then be set a verification code to enter.

1. Select the security questions you would like to answer.
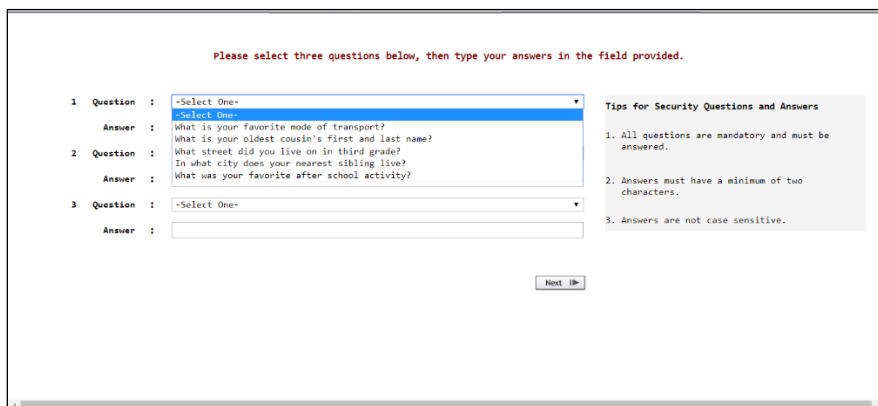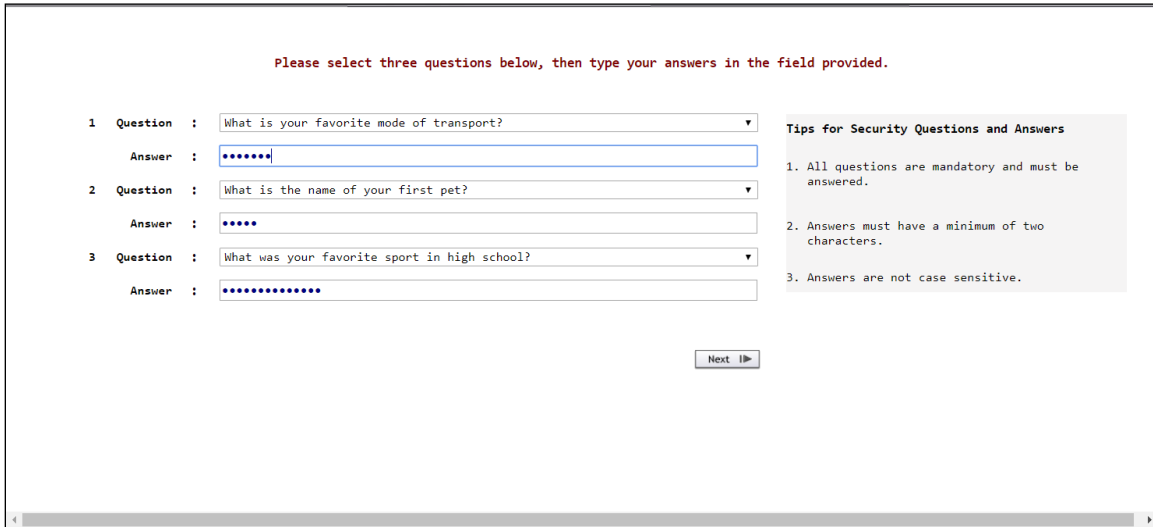


**Figure 4: Security Question**

2. Enter your answers to each before clicking **Next**.
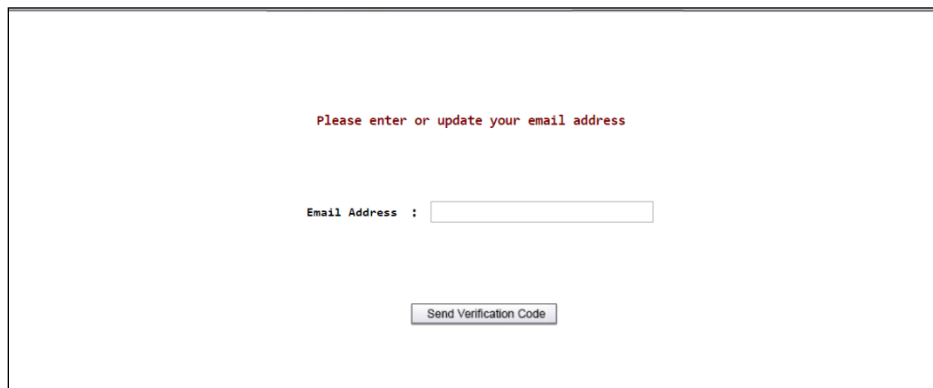


**Figure 5: Security Questions and Answers**

3. Enter your email address (Email ID) or verify the one already associated with your user profile.



**Figure 6: Security email address**

4. The email address format will be validated, and a verification code will be sent to the email address provided.

Dear Valued User,

Please use Verification Code ▩▩▩▩ to validate your email ID.

If you feel your account was accessed in error, please call ▩▩▩▩▩▩▩▩▩.

Thank you for using VFO.

Sincerely,
Customer Support
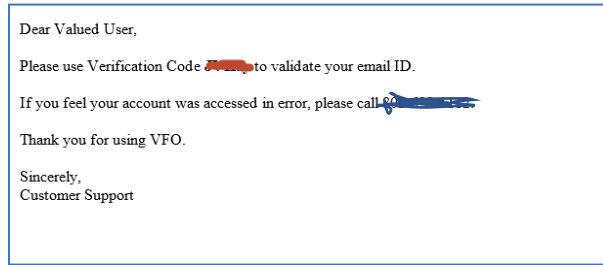
**Figure 7: Security Questions and Answers**

5. Enter that verification code to proceed.

A verification code has been generated and sent to your email address.

**Please enter the Verification Code**

Verification Code : 8UoQi

Resend Verification Code        Next ▶
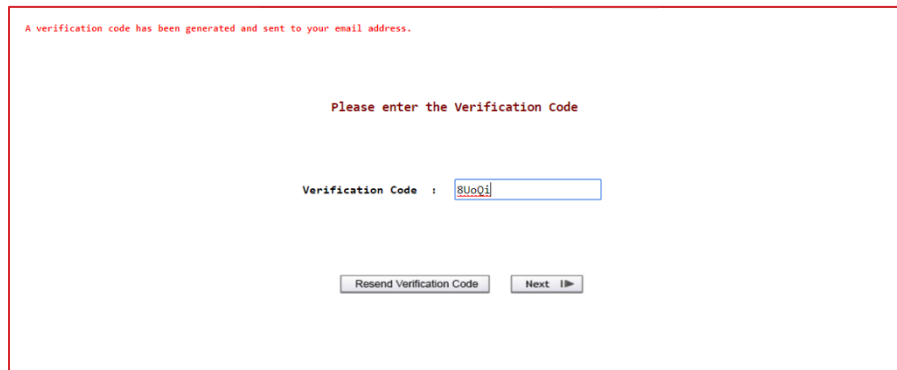
**Figure 8: Security Questions and Answers**

The email address can now be used to retrieve the forgotten user name. And if you forget your password, the email address and security questions and answers can be used to authenticate your login.

## User Profile

A user profile icon 👤 is on the home page to enable you to manage your email and security questions.  All other fields are read only.



**Figure 9: User Profile Icon on Home Page**



**Figure 10: User Profile Details**

## Retrieving Forgotten User Name
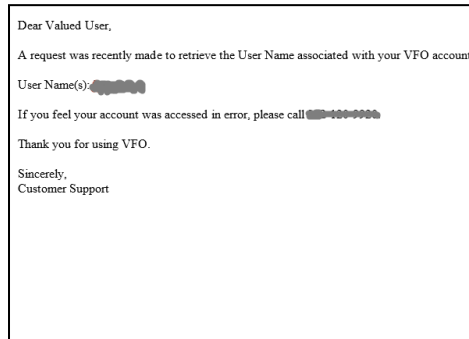
If you forget your User Name, you can retrieve it from the system, by clicking **Forgot User Name?**.  You will enter your email address associated with the User Name and the system will generate an email with the associated User Name(s) with that email address



**Figure 11: Forgotten User Name Email ID**

Upon inputting a valid email address, all usernames associated with that email address will be listed in the email sent.



**Figure 12: Forgotten User Name Email Message**

## Resetting Forgotten Passwords

If you forget your password, you can reset it using the security questions answered the first time you logged in.

Click the **Forgot Password**" link on the VFO Login Page to trigger a four-step user authentication process.

- You will be prompted to enter your username.



**Figure 13: Forgotten Password User Name.**

- You will need to answer a security question associated with your user profile.



**Figure 14: Forgotten Password Security Question**
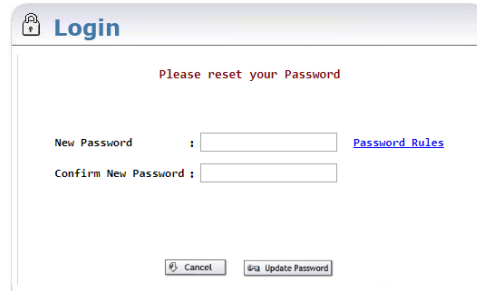
VFO will send a verfication code, which you will use to access VFO, if the answer to the question above is correct.



**Figure 15: Forgotten Password Verification Code**

NOTE: Check your junk email, if you don't see a verification code within 5 minutes.  If still no code, wait an additional 10 minutes before clicking Regenerate to get a new code sent.

- After entering the correct verification code, and clicking **Next**, you will enter your new password twice.
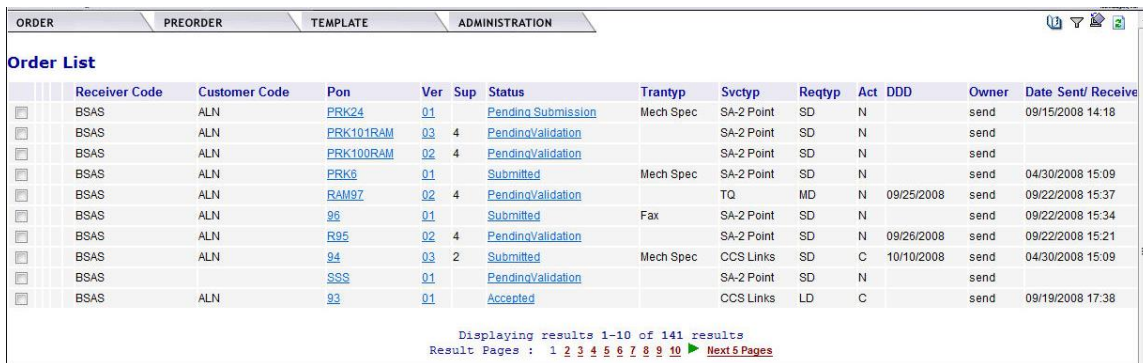


**Figure 16: Forgotten Password New Password Entry**

## Module Lists

In each module, the first screen to appear is the list of existing orders that are stored in the application. The list name is referred to differently in some of the modules, as referenced below:

| Module | List Name |
|---|---|
| Access | Order List |
| Local | Order List |
| TA (Trouble Administrator) | Work List |

NOTE: A company's internal process for managing orders will dictate what orders will be viewable to a user. Viewing capabilities are managed via the Filter function, which will be covered further down in the document.



**Figure 17: Access service request order list**

**<Module> -** Use this drop-down menu to change modules without logging out of VFO. Select the module from the dropdown menu, and then click the **Launch** button next to the <Module> to open the home page of the selected module.

**Home** – Click this link to return to the Order List page.

**About** – Click this link to open a popup window that lists:

- The login name of the current user
- The current user's full name
- the date and time the current version of the application was installed
- Any TP Package details for installed TP Packages
- VFO copyright information

**Help** – Click this link to access VFO Online Help.

**Logout** – Click this link to logout of VFO and return to the Login page.

**Order** – Hover over this tab to access functionality to create or search for an order.

**PreOrder** – This tab allows you to initiate, search and/or submit pre-order transactions.

**Template** – Hover over this tab to access functionality to create or search for a template.

**Administration** – Hover over this tab to access User Profiles and other security related information.  This tab will only be visible if you have sufficient permissions.

Another feature of the List is the shading of certain orders.

- When an order has been reassigned it will be shaded **gray**.

- If the order is considered a Protected Circuit, the PON will be highlighted in **yellow**. (Access Module only)

- If an order was initiated by a user that is no longer active, the user name will be shaded **pink**.

NOTE: The default colors can be changed to suit the needs of the company.  Check with the System Administrator if different colors are observed.

## Sorting the List

A module list can be sorted in ascending or descending alpha or numeric order based on the specific column header selected.  In the TA module, there is a downward facing arrow in one of the column headers when the module is opened to the home page.  Clicking the column name of any other column will move the arrow and re-sort the list according to the selected header.

For example, if you wish to sort the entries by State, you would click the State column.  The arrow would then appear to the right of that column's name and the orders would be sorted alphabetically according to the State.  Clicking the header a second time will reverse the sorting order.

Please note that while clicking on the headers in the Access and Local modules will sort the orders.  However, the default sort is not based on any column heading, so no arrow appears for the default sort.  The default is to sort the records based on the latest time stamp on the transaction.  So after an order is created, modified, or it receives a response, etc., it appears at the top of the list until another transaction is placed or moved to the top based on a recent transaction.

If you change the sorting in the Access and Local modules and want to return to the default sort, click the Return to Default Sort icon.

## Sorting the History List

The user clicks on the History icon to view the PON's history. User can then sort these entries either in ascending or descending date/time order by clicking on the Date/Time column.  The resulting display will be transactions sorted by date/time,, regardless of their versions.

For example, if you wish to sort the entries by Date/Time, you will click the Date/Time column. The arrow would then appear to be pointing upwards and the entries would be sorted in ascending order. Clicking the Date/Time column again will sort the entries in descending order with the arrow pointing downwards.

If you want to return to default sort, click the **Return to Default Sort** icon.

## Using VFO's Action Icons

The following icons are used throughout VFO, in most modules.  In situations where they are not seen, it is because they are context specific and not always a viable function.

NOTE: To specify a record, you must first click the checkbox or radio button to the left of the record.

### User Profile – Manage User Information History

This function will allow a user to see the email associated with his/her user name, change the security question and/or change the security questions.

### Open Book – History Function

This function will allow a user to see any previous actions that have been performed on a particular order.

### Sheet of Paper – Create Response Function

This is used primarily in the Service Request Receive functions but is also available for manual creation of responses sent.

*This icon is not used in the TA module.*

### Funnel – Filter Function

The Filter function allows the user to specify which records appear in a specific module list.  The most recent filter is automatically stored in the system so that the next time the user logs in the list will display the latest filter selection.  Different filter options are applicable for each module.

NOTE: Different Filter options are applicable for each module and will be discussed the in the appropriate sections below.

### Gray Box in Front of Computer – Return to Default Sort Function

This resets the view to the Default sort, which arranges items in the list based on date and time of last update.

*This icon is not used in the TA module.*

### Excel Symbol – Export to Spreadsheet Application

This function will export the Order List data to Excel. It uses Comma Separated Values (CSV) format; so other spreadsheet applications can be used. The icons provided in the Order List are not exported and instead columns are provided with a True Value to indicate if the order is an Access Multi-EC order or if it was created as a Tracking Only Order.

### Two Green Arrows – Refresh Function

This function will refresh the window in which the icon is displayed. It applies to a pop-up window that is displaying the details of an order that was just placed, or to the module list to check the current status of all orders.

### Box above Note – Back to Order Function

This will take the user back to the previous screen. Specifically, it will allow the user to return to an Order after viewing the History.

### Printer – Print Function

Clicking on this icon will print the current screen through the default printer that is configured with the browser. This function is valuable to provisioners who require hard copies of orders.

*This icon is not used in the TA module.*

### Disks – Save Function

This function allows the user to save any changes to a currently displayed order. This function, when used with the History function, allows the user to save previous versions of an order as the current version.

*This icon is not used in the TA module.*

### Running Man – Submit Function

This function first validates the order based on the rules built into the GUI. (e.g.: required fields, correct date and number formats, etc.). Once this GUI validation is completed, the order is sent to Exchange Path for Business Rule Validation. If the order passes the Business Rule validation, it is then sent to the Trading Partner.

### Green Check Mark – Validate Function

This performs the GUI validation and Business Rule validation on the order displayed. This is automatically performed when Submitting the order, but this gives the user the option of performing the validation process without submitting the order.

*This icon is not used in the TA module.*

# Access Module

# Access PreOrder Search and Response

This section explains the procedures for performing the following tasks:

- New Access PreOrder Inquiry Procedure
- Save Access PreOrder Response
- Print Access PreOrder Response
- Search Access PreOrder Responses
- Print Access PreOrder Search Results

## New Access PreOrder Inquiry Procedure

Use the following procedure to perform a new PreOrder Inquiry.

1. Login to VFO and select the Access module. The Order List page opens.

2. Execute the PreOrder>New menu command. The PreOrder Initiation window opens.

**WARNING: An error message will be displayed if configuration to this function is not accessible.**
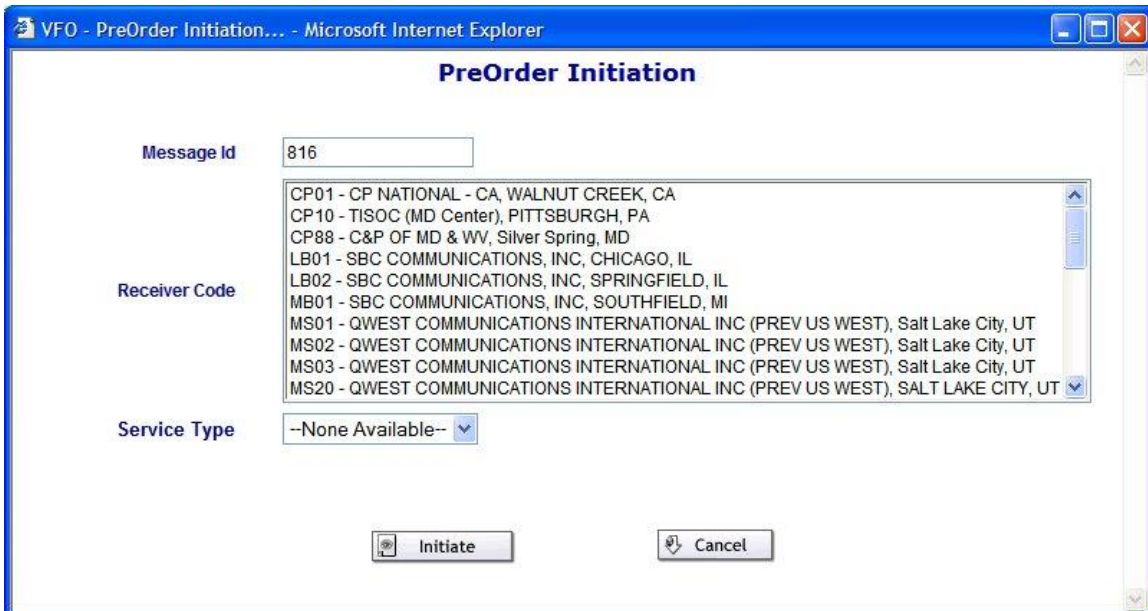


**Figure 18: PreOrder initiation page**

3. The Message ID will be automatically populated with an incremented entry. The Message ID value that was auto-populated can be manually changed.

4. Select a **Receiver Code**.

5. Select the Service Type from the dropdown menu.

6. Click **Initiate**. This opens the PreOrder Request window.

7.  Selecting the CFA Inquiry in the Initiation window will generate the following PreOrder Request window to appear.
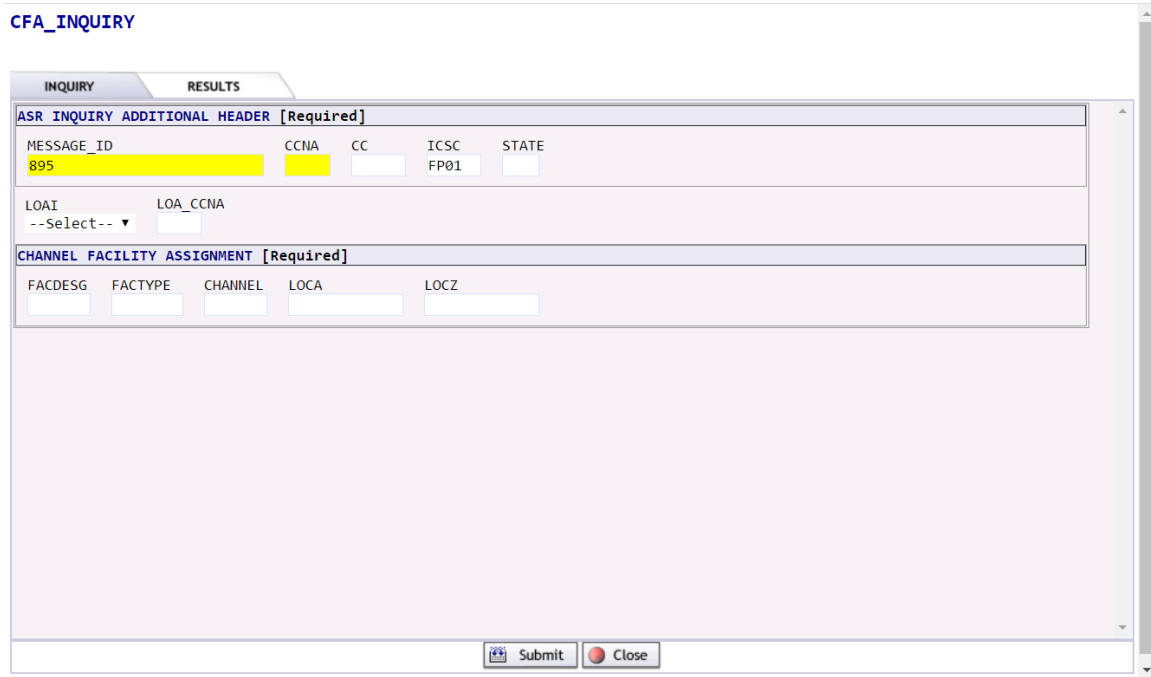


**Figure 19: CFA inquiry page**

8.  Selecting the Location Inquiry in the Initiation window will generate the following PreOrder Request window to appear.
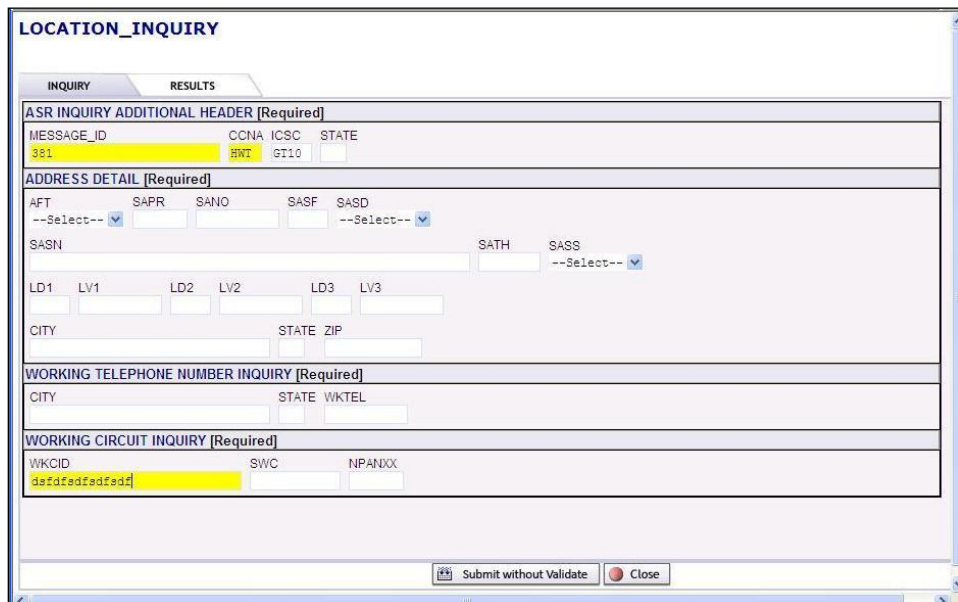


**Figure 20: Location inquiry page**

NOTE:  The **Location Inquiry Switched Ethernet Only** option is also available. Information for this inquiry is not provided in this user guide.  Please refer to:  ASR Pre-Order Location Inquiry Switched Ethernet Only Job Aid

9. Populate the fields with the relevant search criteria.  Yellow highlighted fields require data to be input in order to proceed to the next step.

10. Click **Submit.**  The results are then displayed in the PreOrder Response window.
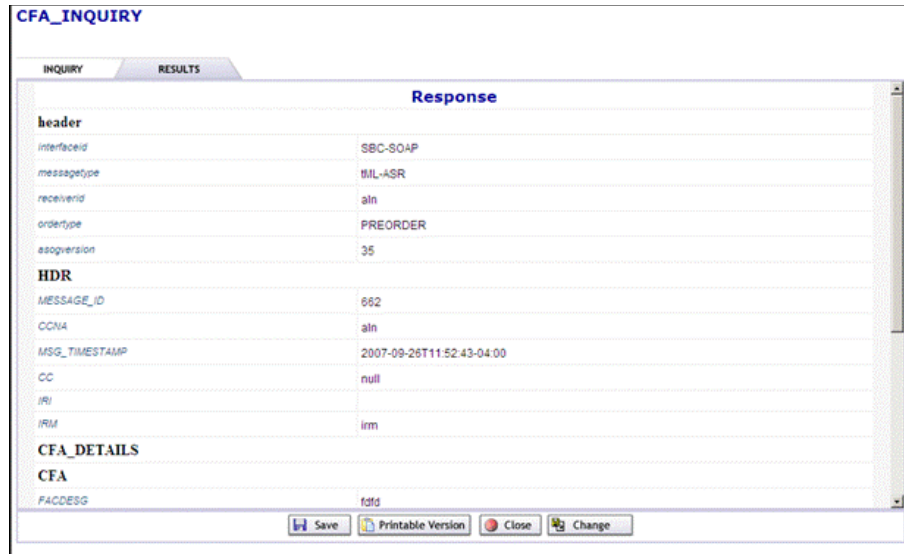


**Figure 21: CFA query results**

For large responses, to view the entire response you may need to use the pagination provided for each section containing more than 10 items.



**Figure 22: PreOrder pagination of results**

Enter the number of records you want displayed at any one time for that section and click the SHOW link.  The default is to show up to 10 items at a time before needing to move to the next page.

Click the outside arrows to move to the first or last page.

Click the inside arrows to move page by page.

- To modify the PreOrder Request, click the Inquiry tab.  This re-opens the PreOrder Request.

- Click the **Change** button to edit the fields.

- Make the desired changes and click **Submit** to resubmit the PreOrder Inquiry.

**NOTE: This window can remain open while starting another Order. This allows a user to cut values that are in the Response window and paste them into the respective fields in the Order window.  The query can also be performed from within the Order itself.**

## Save Access PreOrder Response

Use the following procedure to save PreOrder Inquiry and Response transactions.

1. Execute a PreOrder Inquiry.  Be sure to be in the PreOrder Response window.

2. Scroll to the bottom of the window and click **Save**.

## Print Access PreOrder Response
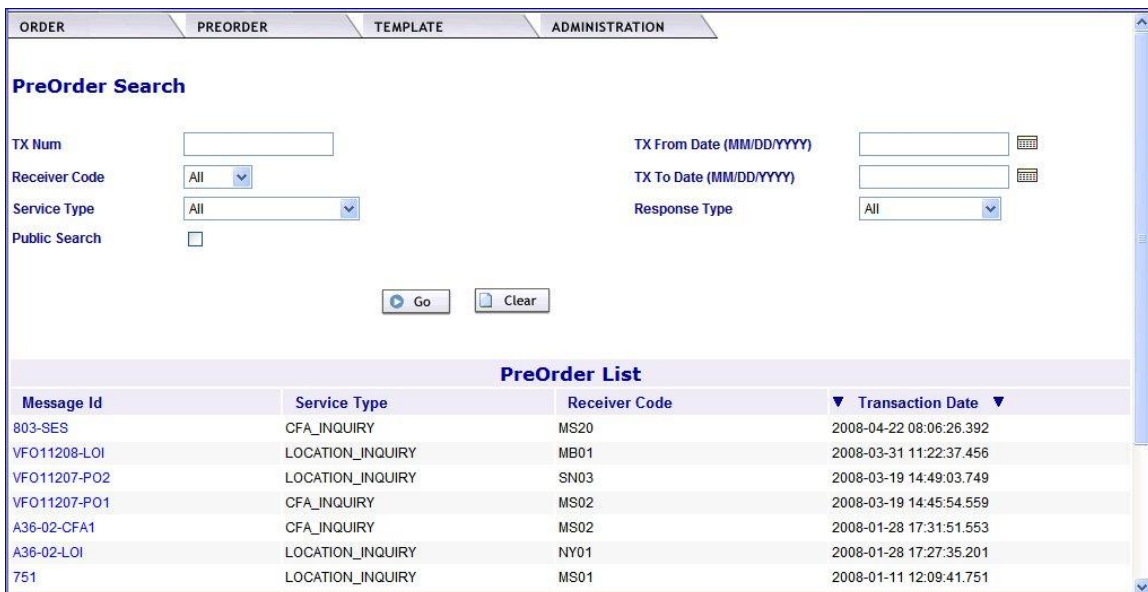
Use the following procedure to print PreOrder response details immediately after generating the response.

1. Execute a PreOrder Inquiry.  Be sure to be in the PreOrder Response window.

2. Click **Printable Version** to open a new window with a version of the Response that is better formatted for a printer.

3. Click **Print**.  The Print dialog box opens to allow printing based on the user's print configuration.

## Search Access PreOrder Responses

Use the following procedure to view PreOrder Response details.

1. Login to VFO and select the Access module.  The Access Order List page opens.

2. Hover your cursor over the PreOrder tab.  A dropdown menu opens.

3. Execute the PreOrder > Search menu command.  The PreOrder Search page opens.

| ORDER | PREORDER | TEMPLATE | ADMINISTRATION |

**PreOrder Search**

| TX Num | | TX From Date (MM/DD/YYYY) | |
| Receiver Code | All | TX To Date (MM/DD/YYYY) | |
| Service Type | All | Response Type | All |
| Public Search | ☐ | | |

Go    Clear

**PreOrder List**

| Message Id | Service Type | Receiver Code | ▼ Transaction Date ▼ |
|---|---|---|---|
| 803-SES | CFA_INQUIRY | MS20 | 2008-04-22 08:06:26.392 |
| VFO11208-LOI | LOCATION_INQUIRY | MB01 | 2008-03-31 11:22:37.456 |
| VFO11207-PO2 | LOCATION_INQUIRY | SN03 | 2008-03-19 14:49:03.749 |
| VFO11207-PO1 | CFA_INQUIRY | MS02 | 2008-03-19 14:45:54.559 |
| A36-02-CFA1 | CFA_INQUIRY | MS02 | 2008-01-28 17:31:51.553 |
| A36-02-LOI | LOCATION_INQUIRY | NY01 | 2008-01-28 17:27:35.201 |
| 751 | LOCATION_INQUIRY | MS01 | 2008-01-11 12:09:41.751 |

**Figure 23: PreOrder search page and results**

3. Users can search using the following criteria.

☐ **TX Num**—Enter the number of the Transaction to search. This field supports wildcard searches using the % symbol.

☐ **ICSC**—Click the dropdown menu to select the ICSC on which to search. This populates the TX Type menu with the transactions that are available for the selected Interexchange Customer Service Center (ICSC).

☐ **Service Type**—Click this dropdown menu to select a type of service (i.e. Address Validation, CFA_Inquiry, Location_Inquiry).

☐ **Public Search**—Check the checkbox to search for all PreOrders. This enables a search that is no longer limited to a specific user ID.

☐ **TX From Date** (MM/DD/YYYY)—The first day of the date-range the inquiry was sent from VFO.

☐ **TX To Date** (MM/DD/YYYY)—The last day of the date-range the inquiry was sent from VFO. If left blank, the system searches up to the current date.

☐ **Response Type**—Click this dropdown menu to select the type of response (i.e. Alternatives Exists, Found, Not Found, Restricted).

☐ **Go**—Click this button to submit the search criteria and view the returns.

☐ **Clear**—Click this button to empty all the populated fields.

5. Enter the appropriate search criteria.

6. Click **Go** to perform the search. The results will display in the bottom half of the window.

## Print Access PreOrder Search Results

Use the following procedure to print the PreOrder Search results.

1. Execute a PreOrder Search.

2. Click the Message ID link of the PreOrder to be printed.

3. Click **Print**. The Print dialog box opens to allow printing based on the user's print configuration.

# Create and Manage Outgoing Access Orders

This section reviews the following:

- Using the Access Order List
- Work Status Icons
- Access Order Statuses
- Creating  Access Orders
- Validating  Access Orders
- Access Four-Step Ordering Process
- Tracking Access Orders
- Searching Access Orders
- Filtering Access Order List
- Creating Access Response
- Supplementing Access Orders
- Using the Save As function
- Updating Access Request General Information
- Viewing Last Notifications
- Using the History Function
- Reverting to Last Saved version of the order
- Reverting to Last Submitted
- Viewing Error List
- Resending Access Orders
- Using External Applications

## Using the Access Order List

The Order List pages display all of the orders entered into VFO.  Each row represents a particular order and shows the following information:

- Receiver Code
- Customer Code
- Purchase Order Number (PON)
- Version of the Order (Ver)
- Supplement Type (Sup)
- Current Status (Status)
- Transmission Type (Trantype)

- Service Type (Svctyp)
- Request Type (Reqtyp)
- Activity (Act)
- Desired Due Date (DDD)
- Owner
- Date Sent/Received



**Figure 24: Order list**

## Work Status Icons

There may be an icon in front of some of the tickets to indicate different work states. Following are what these icons represent:

### Clock



The order is in a "Pending" state. A pending state exists when an order has not been updated by the Trading Partner within the Service Level Agreement (SLA) timeframe. The work state will change as soon as the Trading Partner updates the status of the order. This icon also appears when the order is pending a Firm Order Confirmation, Design Layout Report or Completion Notification from the Trading Partner.

### Flame



The order has been rejected by the Trading Partner. This is not due to Business Rule violations, as those would result in a different work status icon.

**Green Check Mark**

The order has been completed by the Trading Partner.

**Red Bell**

The order has Business Rules Violations.  These violations were detected in Exchange Path and the order was stopped before it reached the Trading Partner.

**Red Hand**

The order has been canceled by the user or by the Trading Partner.

**White Check on Green Folder**

The order has been confirmed.  This means that the Trading Partner has accepted the order and is in the process of fulfilling the request.

**Red Exclamation Mark**

The order is in jeopardy.  This could be due to any number of reasons, from a delay in processing to a lack of resources.

*The following icons are not related to status changes. They allow the user to determine key information about an order via the icon.*

**Train Tracks**

The order was placed outside the VFO system and the order within VFO is only being used for tracking purposes.

**United States Map**

This is a Multi-EC order, which means that the order has been placed through multiple Inter-Exchange Carriers.

This is indicating the order has a related purchase order.

## View Last Notification

You can link to the order in its most recent status by clicking the link in the Status column that corresponds to the order you want to view.

**NOTE: You can open, view and modify multiple Access Orders simultaneously.**

## Access Order Statuses

| Status | Description | User Action |
|---|---|---|
| Accepted | Access Provider (Trading Partner) has returned a positive acknowledgement. Exchange Path has updated the status, stored the message in the Exchange Path Database and sent a notification message to VFO. | Wait for the FOC. |
| Cancel Accepted | The Trading Partner has returned a positive acknowledgement of canceling an ASR; Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a notification message to VFO. | No action required. |
| Cancel Rejected | The Trading Partner has returned a negative rejection acknowledgment for a cancellation. | View the Reject Reason and take the recommended action. |
| Cancel Sent | A Cancel Request has been sent to the receiver/Trading Partner. | No action required. |
| Cancel Submitted | A Cancel Request has been sent to Exchange Path for validation and subsequent processing. | No action required. |
| Cancel Tracked | The Tracking Only Order has been cancelled. | No action required. |
| Clarification | The Trading Partner has returned a Clarification message via the communications gateway. Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a Clarification notification message to VFO. | Review the Clarification message and take the recommended action. |
| Clarification Cleared | The Trading Partner has returned a Clarification Cleared message for the Access Order and Exchange Path has sent a notification message to VFO to update the status. | No action required. |
| Clarification Remarks | The Trading Partner has returned a Clarification Remarks message (which is purely informational) for the Access Order and Exchange Path has sent a notification message to VFO to update the status. | No action required. |
| Completed | The VFO user has manually updated the ASR status to Completed or a Trading Partner has sent a Completed | Review Response |

| Status | Description | User Action |
|---|---|---|
|  | clarification message.  This message is optional and not all Trading Partners support this notification. |  |
| Confirmed | The Trading Partner has returned a Confirmation message for the ASR; Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a notification message to VFO. | Review Response |
| DLR/Design | The Trading Partner has returned a Design Layout Request (DLR) for the ASR; Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a notification message to VFO. | Review Response |
| Errored | The ASR Order has failed the Exchange Path Validation process; Exchange Path has updated the Request Status, stored the ASR, and sent an Error Notification to VFO. | Correct the Rule Error and Validate the Order again. |
| Jeopardy | Indicates there is a situation(s) that may jeopardize critical dates of the ASR Order. | Review the Response and take the recommended action. |
| Jeopardy with Errors | Indicates there is a situation(s) that may jeopardize critical dates of the ASR Order and there is an error(s) with the request. | Review the Response and take the recommended action. |
| Pending Validation | An initial request, or a change to a request, (other than a Cancel) has been created, but the request has not been sent to Exchange Path for validation or submission to the Trading Partner.  After select Submit or Validate the resulting response from Exchange Path will be Validated or Errored. | Complete and Submit the order. |
| Rejected | The Trading Partner has returned a negative (rejection) acknowledgment. Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a notification message to VFO. | Review the Response and take the recommended action. |
| Resent | The VFO user has requested that another copy of the last submitted version be sent to the Trading Partner. | No action is required. |
| Sent | Exchange Path has sent the request to the Trading Partner, updated the status, and sent a notification message to VFO. | No action is required. |
| Submitted | This message indicates that an initial request or a change to a request has been sent to Exchange Path for validation and subsequent processing.  This does not apply to a Cancel Request. | No action is required. |
| Supplement Received | This status appears when the customer has sent a Supplement to the previously received Service Request. | No action is required. |

| Status | Description | User Action |
|---|---|---|
| TP Cancelled | The provider has cancelled the customers ASR Order due to no response to the Clarification/Notification Request. | If the order is still needed create a new request. |
| TP Errored | The Trading Partner has returned one or more error messages for the ASR Order. Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a notification message to VFO. | Review the Response and take the recommended action. |
| Tracked | The order was initiated as a Tracking Only request and will not be transmitted to the Trading Partner.  This option is used when the order was sent outside of the VFO system; however, the progress of the order will be manually tracked in VFO. | No action is required. |
| Validated | Exchange Path returns a validation successful message. | Submit Order |
| Voided. | The VFO user has placed the ASR in Voided status to indicate that the ASR should not be transmitted to the Trading Partner. | No action is required. |

**Note:  Any of these items can have "Inactive" appended to the status to indicate a user has selected to make the label the order as inactive.**

## Create an Access Order

Use the following procedure to create an Access Order:

1.  Login to VFO and select the Access module.

2.  Execute the Order > New menu command.  This opens the Order Initiation page.
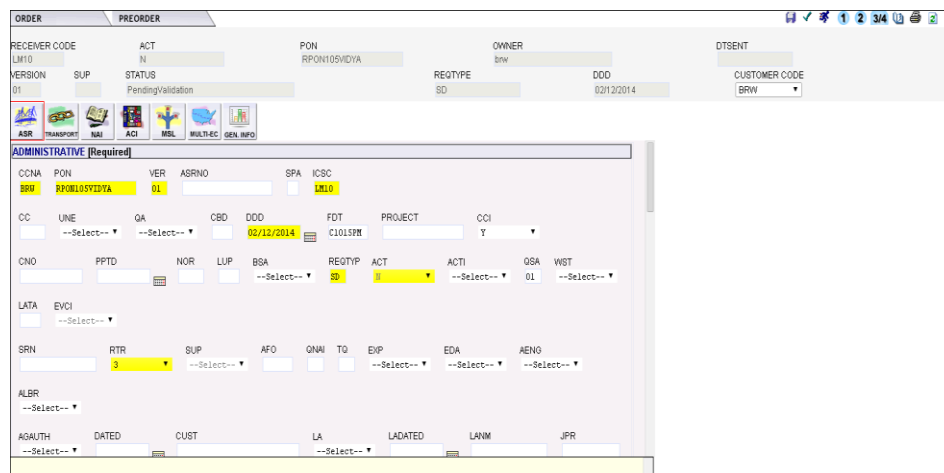


**Figure 25: Order Initiation**

3. The Order Number field will be automatically populated with an incremented entry; however, the value can be changed manually.

4. Enter the Receiver Code.  Enter the entire Receiver Code or just the first characters of the Receiver Code, thereby filtering a dropdown menu from which to select required code.  The name of the Receiver Code appears to the right of the Receiver Code field and a list of the service center's guideline versions populate in the Guideline Version dropdown.

5. The guideline version is automatically populated by the system based on the Receiver Code picked by the user.

6. Select Firm Order from the Type of Request dropdown.

7. Select a Service.  This generates a list of activities available for the service type.  See options below.

8. Select an Activity.

9. Optionally, select a Template.

10. Click **Initiate**. This opens a new Order form.



**Figure 26: Access order page**

11. Populate the fields as necessary.  Yellow highlighted fields require data to be input in order to proceed to the next step.

12. Validate the address without leaving the order by populating the address field and clicking the **Validate** link next to the section header.

**Figure 27: Validate link for address detail**

The response for the above Address Validation would be anyone of the following:

12a. **Exact Match**:

If the values entered in the section have an exact match, then the below response will be displayed.
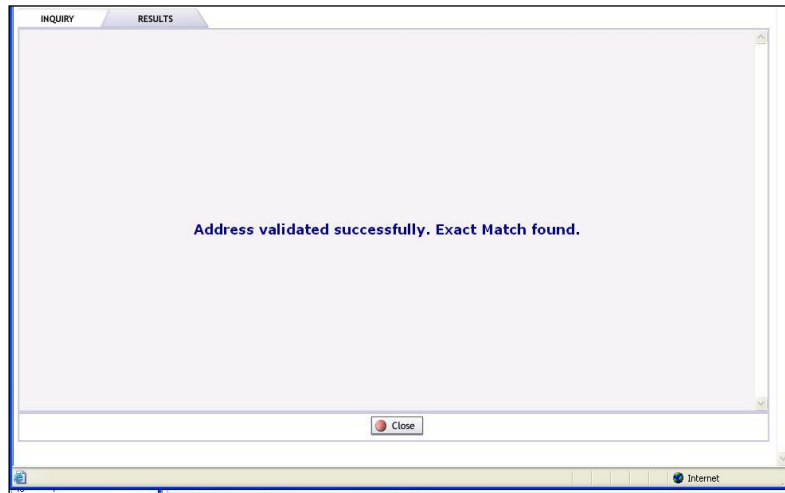


**Figure 28: Exact Match**

12b. **Near Match**:

For all ASR Location inquiry responses, if the values entered in the section have one or more near matches, then the below response will be displayed with the list of all near match values. Users can select one of the addresses by clicking the **Use Address** button. This will pre-populate the ASR order address fields.
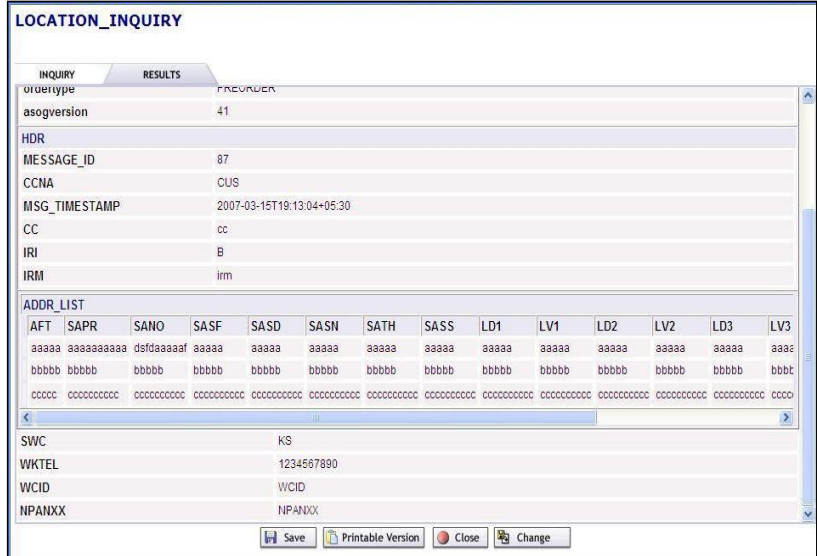
**Figure 29: Near Match**

12c. **No Match**:

If the values entered in the section has no match, then the below response will be displayed.
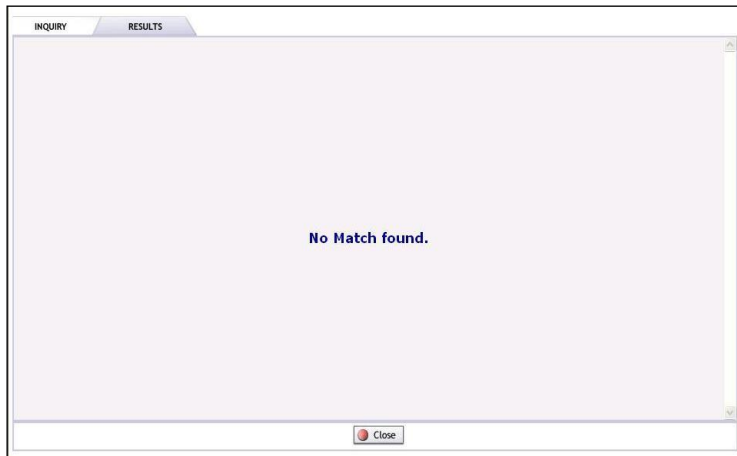


**Figure 30: No Match**

13. You can also validate the CFA by clicking the **Validate** link next to the CFA field name after populating that field.

**Figure 31: Validate link for CFA query**

14. Browse through each of the remaining forms to ensure all required fields are populated.

NOTE: **Click the Save icon in the upper-right corner of the page if you intend to validate the order later.**

15. Click the **Submit** icon.

16. Executing the Submit command validates the order against the business rules. You can also execute the Save, Submit, and Validate functions through the Order menu.

## Access Order Service Types

| Service Type | Usage |
|---|---|
| CCS Links | • SS7 Access Links REQTYP LD |
| Dedicated Internet | Frontier Does Not Support |
| EUSA–2 Point | • Frontier Optical Transport Service REQTYP ED<br>• Special Access–Prem to Prem REQTYP ED<br>• Optical Wave Service REQTYP ED<br>• OC3 Non–Channelized REQTYP ED |
| EUSA–Multi–Point | • Voice Grade bridging HUB to Premise REQTYPE ED |
| End User EVC | • Standalone Ethernet EVC |
| End User Switched Ethernet EVC | • New EIA, New E–Path Combo<br>• EIA IP Reuse and Changes (RPON Both Disconnect and New)<br>• Ethernet UNI VTA/PNUM Change (Combo Process)<br>• Ethernet EVC VTA/PNUM Change (Combo Process) |
| End User Switched Ethernet | • EIA UNI Upgrade, Move, Records, Disconnect<br>• E–Path Standalone Point to Point UNI, Standalone UNI<br>• Ethernet UNI Bandwidth Upgrade, UNI Collocation |
| Feature Group A–Multi–Point | Frontier Does Not Support |
| Feature Group A | • FGA 7–digit telephone number REQTYP AD |
| Feature Group B | • FGB Dial codes 950–XXXX REQTYP MD |

| Service Type | Usage |
| --- | --- |
| Feature Group D | • Switched Access– FG D Trunk Group New, Augment, Disconnect<br>• Switched Access–Remove, or Redirect CICs<br>• Local Interconnection Switched Access– Translations ONLY<br>• Wireless Switched Access Existing Type 2A & 2B Trunks New, Augment, Disconnect<br>• Wireless Switched Access Existing Type 2A & 2B Trunks New, Augment, Disconnect<br>• Wireless Switched Access 911 Trunks (Type 2C) New, Disconnect |
| Forecasting | Frontier Does Not Support |
| Local Trunking Service | • Local Interconnection Switched Access New, Augment Disconnect |
| PIP Standalone EVC | Frontier Does Not Support |
| Private IP EVC | Frontier Does Not Support |
| Private IP PVC | Frontier Does Not Support |
| Private IP | Frontier Does Not Support |
| Ring Service | • Dedicated SONET Ring REQTYP RD |
| SA–2 Point | • DecaMan Layer 1 Ethernet, WaveMAN–Layer 1 Ethernet<br>• Special Access–Frontier Optical Transport Service REQTYP SD<br>• Special Access CFA Roll/Hot Cut<br>• Special Access– DS0's terminating at an End User REQTYP SD<br>• Special Access– DS1 and DS3<br>• DS3 Riding multiple segments of a ring<br>• Optical Channel Network (CONCATENATED & NON–CONCATENATED)<br>• Optical Hubbing Service<br>• Optical Wave Service REQTYP SD<br>• Special Access OC3 Non–Channelized REQTYP SD<br>• Dark Fiber |
| SA–Multi–Point | • Voice Grade bridging HUB to Premise REQTYPE DD |
| SACNXX | Frontier Does Not Support |
| Standalone EVC | • EIA EVC Upgrade, Move, Records, Disconnect<br>• EIA Change CIDR<br>• EIA Standalone EVC Repoint<br>• E–Path Standalone Point to Point EVC<br>• E–Path Standalone EVC<br>• Ethernet EVC Bandwidth Upgrade |
| Standalone PVC | Frontier Does Not Support |
| Standalone Trunking | • Switched Access Trunks Only REQTYP MD |
| TQ | • Translations Questionnaire Only REQTYP MD |
| Transport EVC | Frontier Does Not Support |

| Service Type | Usage |
|---|---|
| Transport Switched Ethernet EVC | Frontier Does Not Support |
| Transport Switched Ethernet | • E-Path Core POP ENNI New, Disconnect<br>• E-Path ENNI New, Disconnect |
| Virtual Connection–EUSA | Frontier Does Not Support |
| Virtual Connection–SA | Frontier Does Not Support |
| WAL Ext | Frontier Does Not Support |
| WAL | Frontier Does Not Support |
| CCS Links | • SS7 Access Links REQTYP LD |

## Validate an Access Order

The Validate command in VFO validates Access Orders against the business rules. The validation request is sent to the Business Rule Management System which performs initial validations, service provider business rule validations, and/or Trading Partner specific business rule validations.

To validate an order, simply click the **Validate** icon.

> **NOTE Executing the Submit command (by using the menu command or by clicking the Submit tool) automatically validates the Access Order.**

If any portion of the order fails validation, a window detailing the errors, by field, will appear.
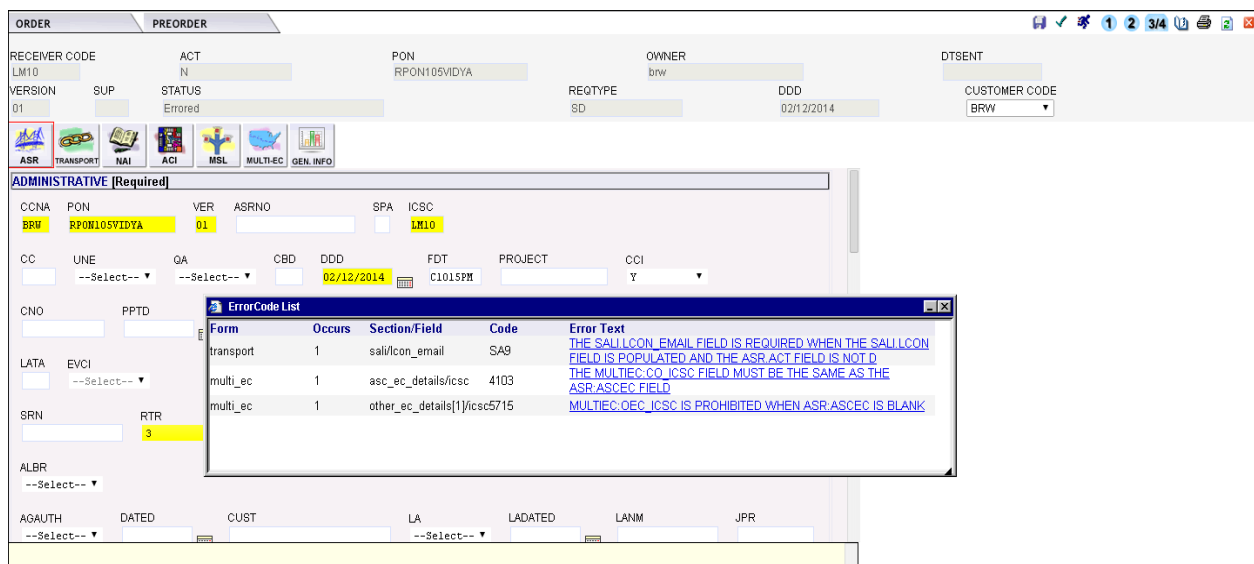


**Figure 32: Validation error code list**

By clicking the link that appears in the Error Text column, the user will be taken to the first occurrence of that error.

NOTE: These errors only refer to specific fields. If entire sections are in error, users will need to locate them manually.

### View Error List

VFO allows you to view the errors that were found in an order. Violated rules are displayed in the Error Code List in a pop-up browser.

To view the errors, open the Access Order and execute the Order > View > View Error List menu command.

This same command can be used to view the errors from the Trading Partner. TP Errored and Rejected statuses will generate an Error List of the fields the Trading Partner rejected or required. Some of these errors will link to field when clicked. Others will need to be navigated to manually. This behavior is dependent on how the field is returned by the Trading Partner.
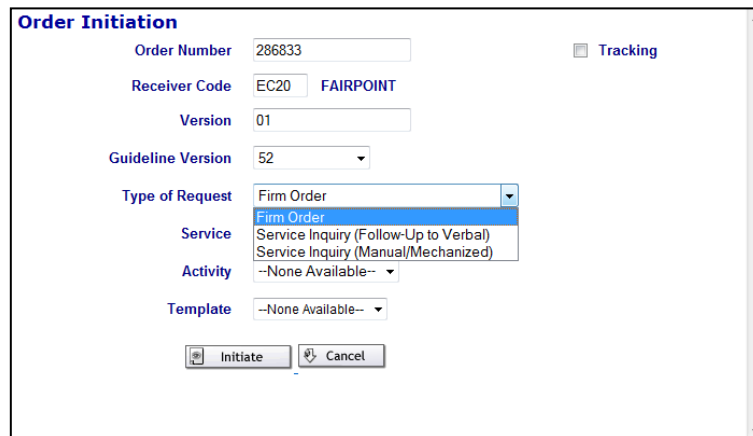
You must Supplement the order before you can correct the errors.

## Access Four-Step Ordering Process

The VFO Access Four-Step Ordering Process allows you to send an Access Order as an Inquiry before you send it as a Firm Order.

Use the following procedure to perform a Four Step Order.

1. Begin creating a new Access order as usual. (Order > New)

2. Select Service Inquiry (Manual/Mechanized) or Service Inquiry (Follow-up to Verbal) from the Type of Request dropdown.



**Figure 33: Four Step Order Initiation**

This drives the second character of the REQTYP.

A = Manual/mechanized

G = Access Service Request follow up to verbal

3. Submit the order.

4.  Once you receive a response from the Trading Partner, click the PON link of that Response.

5.  In the resulting pop-up window, use the Order > Action > Convert to Firm Order menu functionality. This drives the second character of the REQTYP.

> C = Manual/Mechanized

> J = Access Service Request follow up to verbal

6.  Make any changes necessary and submit the new Firm Order.

You can still execute the Save, Submit, and Validate functions through the Order menu.

## Search Access Orders

The VFO Search functionality allows you to search all Access Orders for the occurrence of specific values.  You can extend your search by using the wildcard (%) character.

Use the following procedure to find a specific Access Order(s):

1.  On the Order List page, execute the Order > Search menu command.  This opens the Search dialog, as shown below.
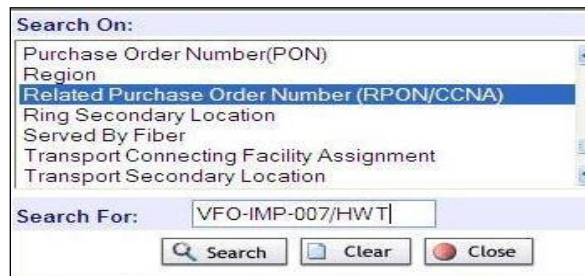


**Figure 34: Search page**

2.  Select the criterion from the Search On list.

3.  Enter the value you wish to search for in the Search For field.  This field is not case sensitive.

4.  Click **Search**.

Many of the fields in the search criteria list start with the ASR form where the field resides.  For example, "Transport Connecting Facility Assignment," is the CFA field on the Transport form.  Below are the values that appear without the form noted:

| Search On Value | Location on Access Order |
|---|---|
| ACTL | ASR form>Administrative>ACTL field |
| ASR Number | Appears on responses from receiver. |
| Bandwidth | Gen. Info form |
| Confirmation EVC Circuit ID | Confirmation form |

| Search On Value | Location on Access Order |
|---|---|
| 911 | Gen. Info form |
| Initiator | ASR form> Contact section> INIT field |
| Market | Gen. Info form |
| Mobile Technology | Gen. Info form |
| Multi-EC Order | Multi-EC form |
| Other Exchange Company | Multi-EC form> Other Exchange Company section> ICSC field |
| Project Code 1 | Gen. Info form |
| Project Code 2 | Gen. Info form |
| Project Code 3 | Gen. Info form |
| Protected Circuit | Gen. Info form |
| Provider Name | Gen. Info form |
| Purchase Order | ASR form |
| Region | Gen. Info form |
| Related Purchase Order Number (RPON/CCNA) | ASR form |
| Served By Fiber | Gen. Info form |

**NOTE:  The Gen. Info form was created to provide companies with a form to enter information for internal use only.  Please check with your company to see which fields your company wants you to use and the information that should be entered.  The information on this form is not sent to the Receiver of the Access request.**

## Filter Access Order List

The Filter function allows you to limit the selection of orders displayed in the Order List.  You can save the filter settings and apply them to future sessions.  Your Order List filter settings will open as part of the login process.

Use the following procedure to filter the Access Order List:

1.  At the Order List page, click the **Filter** icon.

2.  This opens the Order List Filter window.  Below are some of the field descriptions.
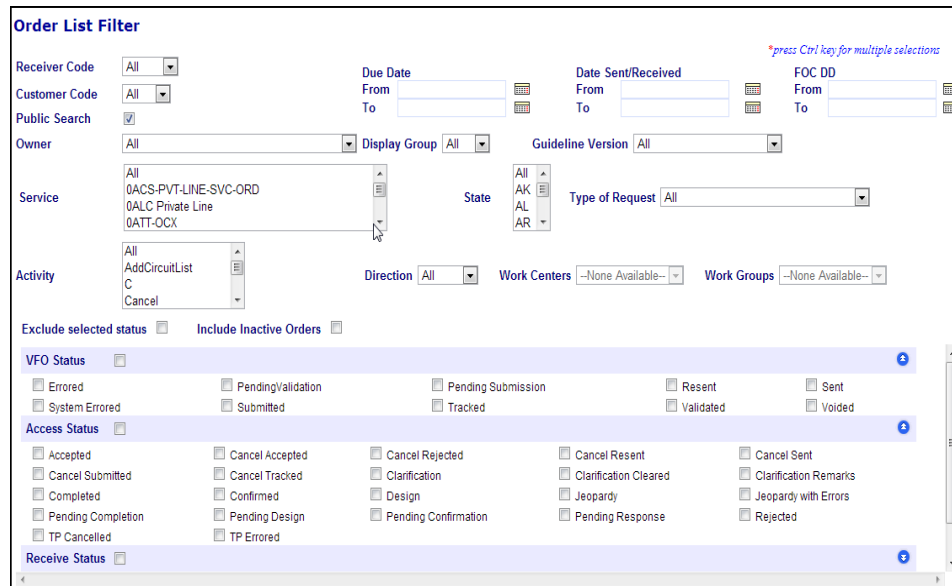
**Figure 35: Order list filter**

- **Receiver Code:** This is the code used to identify the Trading Partner (i.e., Interexchange Customer Service Center or ICSC code or OEC in the order).

- **Customer Code:** Filters the orders based on the code used to identify the sender of the order request (i.e., Customer Carrier Name Abbreviation, CCNA).

- **Public Search:** When checked, all orders will be listed or those for a selected Initiator. When unchecked, only orders placed by the user will be displayed.

- **Owner:** During a Public Search, the orders can be filtered by a specific Owner by selecting a user from the drop-down menu.

- **Display Group:** A group of users. Administrators can set up Display Groups and associating users to those groups.

- **Due Date:** These fields can be used to find orders within a due date range.

- **Date Sent/Received:** These fields can be used to limit the range of the orders based on the date sent or received.

- **Service**: Filters the results by the service being performed.

- **Type of Request**: Filters the results by the type of request:

  o Firm Order

  o Firm Order (Follow-Up to Verbal)

  o Firm Order (Manual/Mechanized)

          o   Service Inquiry (Follow-Up to Verbal)

          o   Service Inquiry (Manual/Mechanized)

- **Activity**:  Filters by the kind of order that has been placed.

- **Guideline Version**:  Filters by the Guideline Version that the order has followed.

- **Direction**:  Filters the Order List based on whether the orders were Sent or Received.

- **Work Centers**: Filters the Order List based on Work Center

- **Work Groups**: Filters the Order List based on Work Group

- **State**:  This field may be populated with the states supported by the user's company.  See your Sales Associate for details.

- **Include Inactive Orders:**  By default, orders that are made "Inactive" will not show on the Order List.  If you want them to show in the list, select this check box.

- **Tracking Orders:**  Select this check box to narrow the list to just orders entered for tracking purposes only.  This are 100% manual transactions; nothing is sent to the Receiving Trading Partner.

- **Multi-EC Orders:**  Select this check box to narrow the list of order to those involving multiple exchange carriers.

- **RPON Orders:** Filters the Order List based on PONs with the RPON field populated.

- **Status Fields**:  Lists all the possible statuses.

3.  Select the items you want displayed on your Order List, or check the Exclude box, which allows you to display all items except the items you have checked.

4.  By clicking the checkbox next to the header of a subsection, you select all the statuses within it.

5.   Some of the available filter options may be minimized into their headers.  By clicking the blue downward arrow  you can open these sections up.  Minimizing them is accomplished by clicking the upward facing arrow.

6.  Click **OK**.  The Order List results will only contain the items matching your selections.

New VFO users signing in for the first time will have the filter default to their orders. This will return a blank Order List with the message "No Records Found".  The users can then reset their filter as needed.

**NOTE: Click the Clear button on the Order List Filter window to erase all previous selections.  Make your selection and click OK to return to the list and view the new filter results.**

      

> The filter selections remain the same from log on to log off until changed.

## Using the History Function

### View the History

Use the following procedure to view the history of an Access Order.

1. Log into the Access module. VFO opens on the Order List page.

2. Click the History icon (the icon that looks like an open book). This opens the Order History page where you can view and print the history of the selected Access Order. Alternately, users can use the Order > View History menu functionality, after selecting the order with the radio button, to open the Order History page.



**Figure 36: Order history**

> NOTE: If the History is opened from within an Order, users will see a return to order icon. This icon allows users to return to the previous window.

3. Click **View XML** to show the XML, which will be or was sent to Exchange Path after the user clicked **Validate** and/or **Submit**.

4. Click the **Download XML** icon to download the Request XML and all the associated response XMLs in a single zip file. The zip file name will be PON_Version.zip.

## Access Supplement

VFO allows the user to supplement information to an order that has already been submitted. These supplements, as well as the numbers used to identify them, are as follows:

- ☐ 1-Cancel
- ☐ 2-New Desired Due Date

☐ 3/4-Other (Change After/Before FOC)



**Figure 37: Order Supplement Icons**

In order to supplement a service request, it must have a status of Sent or any response other than Complete from the provider.

Use the following steps to supplement an order:

1.  Select an order from the Order List by clicking the PON.

2.  Hover over the Order menu and select the Supplement option. Alternately you can click the number, in the upper right-hand corner, that corresponds with the Supplement you wish to perform.

**NOTE: When other changes are being made, you can select icon 3/4 and the system will select Sup Type 3 or 4 based on the status of the order.**

3. If the order has an alphanumeric or alpha version, a window will appear for the user to enter an incremented version and then click Change.



**Figure 38: Supplement change version page**

4.  If you perform a Cancel Supplement you will be asked to confirm the action.

5.  If you perform a New Desired Due Date Supplement, the following image will pop up.
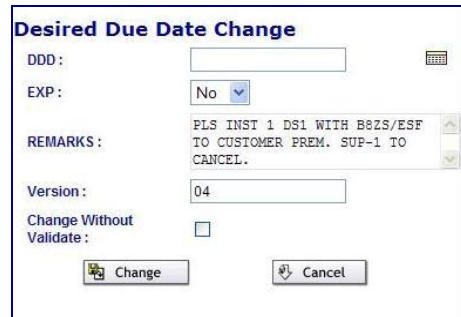
**Figure 39: Desired due date change**

6. Click the Calendar icon to the right of the DDD field to select available dates for the new DDD.

7. Click **Change** to apply the changed DDD to the order.

8. If you perform a Supplement Others and do a change before FOC or a change after FOC, the order window will display the current order and allow you to change the fields.

9. Click within the Remarks field and explain the purpose of the Supplement order.

10. Click **Submit**.

If VFO does not find a Firm Order Confirmation on the PON that is being supplemented, the error message "Supplements to change the due date are only valid for requests which have a firm order confirmation" will be displayed and users will be prevented from submitting the SUP 2.

### Switch certain Service types on Supplements

Once an initial version of a Transport EVC or an End User EVC (i.e., combo) ASR is submitted to the TP, VFO users will be able to convert them to UNI/NNI service types via supplement functionality.

This can be done by doing a SUP 3 or 4 on version 2 of the order and selecting "Convert to UNI/NNI Service type" option.

**Figure 40: Convert to UNI/NNI Service Type**

**Note: This option will not be displayed while doing a DDD change or cancelling the order.**

After conversion, the service type of an End User EVC ASR will change to EUSA 2 Point.  Likewise, the service type of a Transport EVC ASR will change to SA 2 Point after conversion.  No other service type changes will be allowed via the supplement functionality.  Users will need to do a cancel/reissue for other service type changes.

By selecting the above option, ASR.EVCI field is disabled and will be auto populated by VFO based on the service type selected by the User as follows:

| If SERVICETYPE IS: | THEN ASR:EVCI IS: |
|---|---|
| Transport EVC | B |
| End User EVC | B |
| Standalone EVC | A |
| All other servicetypes | blank |

**Cancel Order Details**

A Cancel Order is treated as a Supplement to the original Access Order. Canceling an Access Order does not delete it from the VFO database or affect any Supplements.

The Cancel Order function is enabled for the following statuses:

- Accepted
- Clarification
- Confirmed
- Errored

&#9744;   TP Errored

&#9744;   Validated

The Cancel Order is disabled when the following conditions are met:

&#9744;   Access Order was never submitted

&#9744;   Access Response status is:

- o  Cancel Accepted
- o  Cancel Rejected
- o  Cancel Sent
- o  Cancel Submitted

## Visual Notification for RPON

If the original ASR has the RPON field populated, an alert will be generated by VFO when the user modifies an Access Order (i.e., initiates a supplement request) after successfully submitting it.

1. VFO user logs in and initiates a sup against an ASR that was previously submitted to the TP.

2. If the ASR.ADMIN.RPON field is populated in the version that is being supp'ed, a pop-up window is displayed with the following alert: "The PON you reverted to/are supplementing has an RPON associated with it."
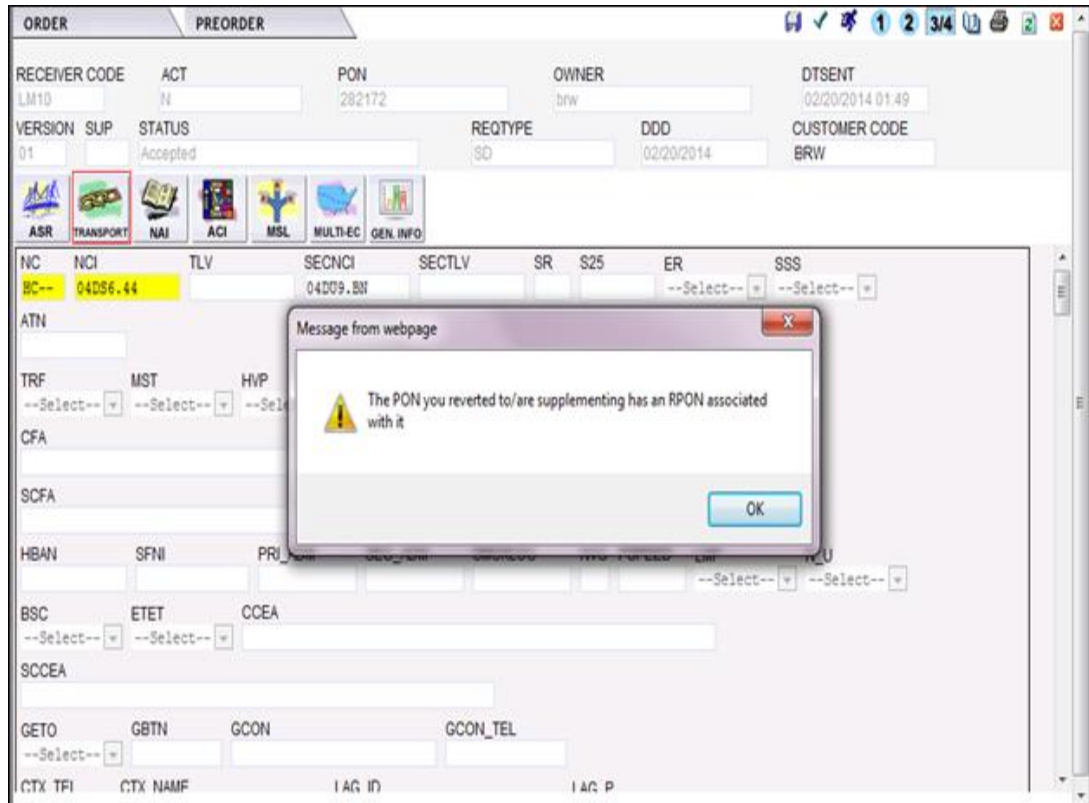
**Figure 41: RPON Visual Notification – ASR**

3. Users may click the OK button and proceed with supplementing the order.

4. SUP pop-up window is displayed, user proceeds with populating the Version field and clicks the Change button.

## Visual Indicator for RPON

If an access order has an associated RPON field populated, then an icon 'R' will be displayed in the Order list. In the event there is more than one version for a PON, the RPON icon will be displayed if the latest version has the RPON field populated.



**Figure 42: Visual Indication for RPON**

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## Revert to Last Submitted

If you modify an Access Order after you successfully submitted it (i.e., started a Supplement request), you can back out the changes to the VER and SUP fields and return to the previously submitted status of the Access Order by executing the Order > Revert > Revert to Last Submitted command. This command restores the previously submitted version of the Request even if you executed the Save command to save those changes. This function is only available before the Supplement is submitted.

## Revert to Last Saved

If you are entering values into the fields of an Access Order and then decide to return to the previously saved version of the Access Order, execute the Order > Revert > Revert to Last Saved menu command.

NOTE: **This goes back to the data that was saved before the current saved data. So, after you save the data, you can use this command to revert to the way the order was before you made changes and hit SAVE a second time.**

If the ASR.ADMIN.RPON field is populated in the version that is being supp'ed and was reverted, a new pop-up window is displayed with the following alert:

"The PON you reverted to/are supplementing has an RPON associated with it".

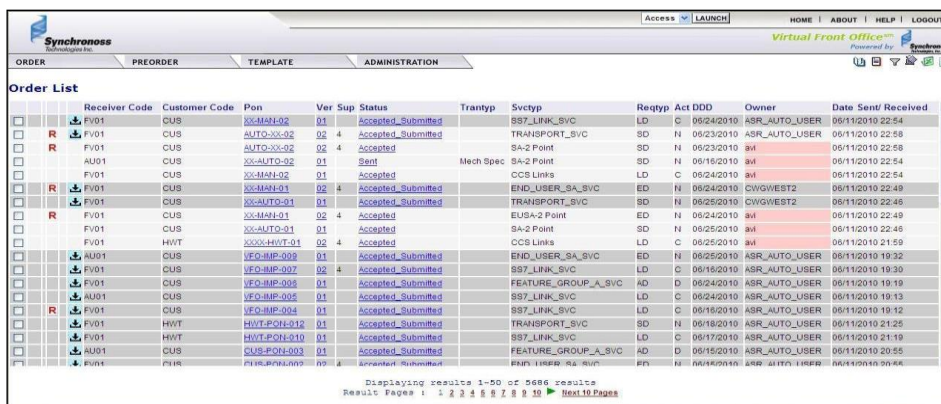## Save As an Access Request

VFO allows you to save a copy of a selected or current Access Order under a different PON. You can execute the Save As command from the Order List page or from within an existing Access Order.

This can be performed on both ASOG and Non-ASOG orders.

Use the following procedure to Save As or copy an existing Access order.

NOTE: **If you are doing a Save As from the Order List page, you must first click the radio button of the order you want to copy.**

1. If performing the action from the Work List, use the Order > Save As Order menu command. If performing it from within the order itself, use the Order > Action > Save As Order menu command. This opens the Save As New Order window.

**Figure 43:  Save as new order**

2. Enter a new, unique PON.

3. Optionally, select a new Receiver Code and change the activity.

4. Click **Save**.

## Void Service Requests

VFO allows you to void a Service Request for any reason, if the Service Request has not been sent to the Trading Partner. This also includes orders that have been submitted but received a System Error.

When the initial orders have been Rejected by the Trading Partner, the order can be voided in VFO.  However, if the order has been supplemented it cannot be voided.

To void a Service Request:

1. Open the Service Request.

2. Hover the Order tab.

3. Click the Void menu command.

## Inactivate and Activate Orders

All active orders created in the application are displayed in the Order List by default.  Orders are considered Active unless a user specifies otherwise.

The only orders not displayed with the default filter are "Inactive" orders, however you can choose to include those orders in the Order list by checking the check box "Include Inactive Orders" in the filter.

### Inactivating Orders

Orders became "Inactive" when a user applies this label to the order. To indicate an order is inactive the user:

1. Opens the service request by clicking the PON in the Order list.

2. Hovers over the Order tab.

3. Selects the menu options Edit > Inactivate Order.

4. The status of the order will be appended with the word "/Inactive."

**NOTE:** **If a response is received on an "Inactive" order, the system will automatically set the order as active and remove the "/Inactive" notation in the status and depending on the filter criteria, show the order on the Order list.**

### Activating Orders

To make an Inactive order Active:

1. Click the PON in the Order list to open the service request.

2. Hover your mouse over the Order tab.

3. Select the menu options Edit > Activate Order.

The "/Inactive" text will be removed from the order status and it will appear on the Order list when the default filter criteria are used.

## VFO allows Users to Update the Access Request General Information

When a Trading Partner sends a Completion Notification, the Carrier or customer often has work to do before the service can be turned up.  VFO allows users to add or update the customer "Completion Date" field, as well as other data on the General Information form.

Use the following procedure to update the General Info tab:

1.  Click the PON to open the ASR.

2. Execute the Order > Edit > Update Custom Form command.

3. In the Completion Date box, click the Calendar icon.

4. Select the new Completion Date and click **Change**.

# Working with Templates
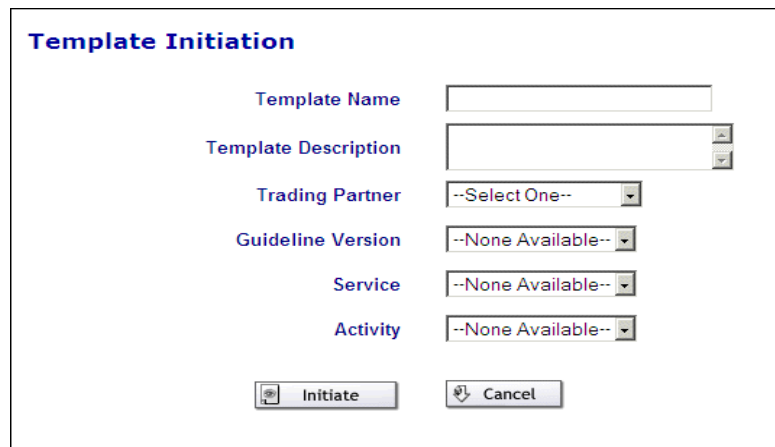
This section reviews the following:

- Creating Templates
- Saving Templates
- Applying Templates after Order Initiation
- Searching for a Template

## Create a Template

Templates use common data values to pre-populate orders, thereby reducing, or eliminating redundant data entry and reduce errors.  VFO lets you tailor your own templates for every type of Service Request, as well as giving you the ability to modify, update, or delete an existing template from VFO.

Use the following procedure to create a template:

1.  Log into VFO and select a module.  This opens the Order List page.

2.  Hover your cursor over the Template tab.  This reveals the Template menu.

3.  Execute the Template > New menu command.  This opens the Template Initiation page.



**Figure 44: Template initiation**

☐ **Template Name** — Enter a user-defined, unique name for the template.

☐ **Template Description** — Enter a user-defined value that describes the template.

- ☐ **Trading Partner** — Select a Service Provider to display their available Service Centers.

- ☐ **Service Center** — Select a Service Center to generate a list of their available versions.

- ☐ **Guideline Version** — Select a version.

- ☐ **Service** — Click this dropdown menu to select the Service Type for the negotiation of Service Request.

- ☐ **Activity** — Click this dropdown menu to identify the activity involved in this service request

- ☐ **Initiate** — Click this button to submit the values entered on this page and add the new template to the list of available templates.

- ☐ **Cancel** — Click this button to ignore the values entered on this page and return to the Order List page.

4. Populate the Template Initiation page.

5. Click **Initiate**.  This opens a shell of an order.

6. Populate the fields with common data values that, when selected, will pre-populate a new form.

7. Browse through each of the remaining forms and repeat step 6.

8. Click the Save icon in the upper-right corner of the page.  This saves the values to the database.

## Save As Template

Another way to create a template is to execute the Save As Template menu command.  This command is available in the Order menu on the Order List page and in the Order menu on the Service Request.

Use the following procedure to save a Service Request as a template:

1. If you are on the Order List page, click the radio button of the Service Request you want saved as a template and execute the Order > Action > Save As Template menu command.

2. If you are in the Service Request, execute the Order > Action > Save As Template menu command.

Either of these commands opens the Saved Order as a new template.

3. Enter a unique value in the Template Name field.

4. Click **Save**.

## Apply Template after Order Initiation

The Apply Template command populates blank fields of a Service Request with the respective values of the selected template.

Use the following procedure to apply a template from within a Service Request Order form:

1.  Initiate a Service Request.

2.  Execute the Order > Edit > Apply Template menu command. This opens the Apply Template window.

3.  Select the desired template from the dropdown menu.

4.  Click **OK**.

## Search for a Template

Use the following procedure to search for a template.

1.  Log into VFO and select the module.  This opens the Order List page.

2.  Hover your cursor over the Template tab.  This reveals the Template menu.

3.  Execute the Template > Search menu command.  This opens the Template List page, which lists all available templates.



**Figure 45: Template list**

☐ **TemplateName** — Enter the name of the template and click **Go** or click the template name link.

☐ **Trading Partner** — Enter the value that identifies the service provider in this service request and click **Go** to search on that value.

☐ **ServiceType** — Enter the value that identifies the type of service and click **Go** to search on that value.

☐ **Activity** — Enter the value that identifies the activity involved in searched service request and click **Go** to search on that value.

☐ **Delete** — Click a radio button(s) that corresponds to the template you wish to remove.  Then click the red X in the upper right corner of the page to remove a template from the Template List and from the database.

☐ **Go** — Click this button to submit the search criteria entered on the page to the Template database.

☐ **Clear** — Click this button to remove search criteria from the fields on the Template List page.

**NOTE: Executing the Clear command does not clear radio button selections.**

# Local Module

# Local PreOrder Search and Response

This section explains the procedures for performing the following tasks:

- Performing Local PreOrder Inquiries
- Saving Local PreOrder Response
- Printing Local PreOrder Response
- Searching Local PreOrder Responses
- Printing Local PreOrder Search Results
- Validating PreOrder Business Rules

## Local PreOrder Inquiry Procedure

**WARNING: You will notice an error if you have not been configured to use the PreOrder functionality.**

Use the following procedure to perform a new PreOrder Inquiry.

1. Log into VFO and select the Local module. The Order List page opens.

2. Execute the PreOrder>New menu command. The PreOrder Initiation window opens.
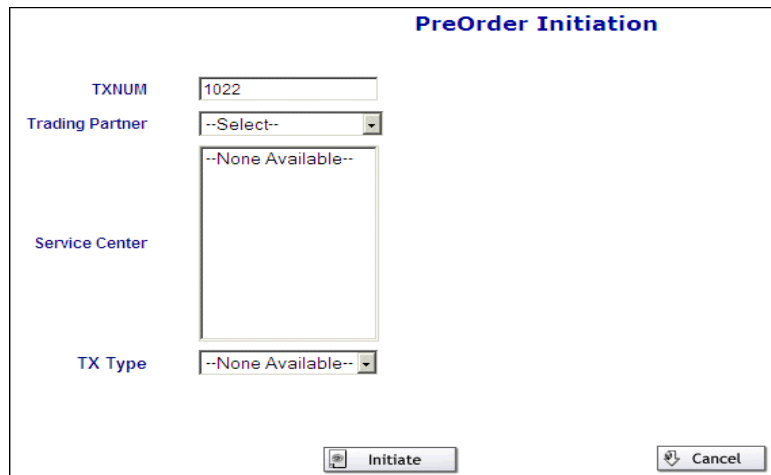


**Figure 46: Preorder initiation**

☐ **TXNUM**: This will be automatically populated with an incremented entry. Optionally, you can change the value in the TXNUM field manually.

☐ **Trading Partner**: This dropdown will contain all the Trading Partners that have been configured for use in this module.

- **Service Center:** The options listed will be determined by the choice of Trading Partners.

- **TX Type:** The Transaction Type will be determined based on the selected Service Center.

3. Click **Initiate**. This opens the PreOrder Request window.
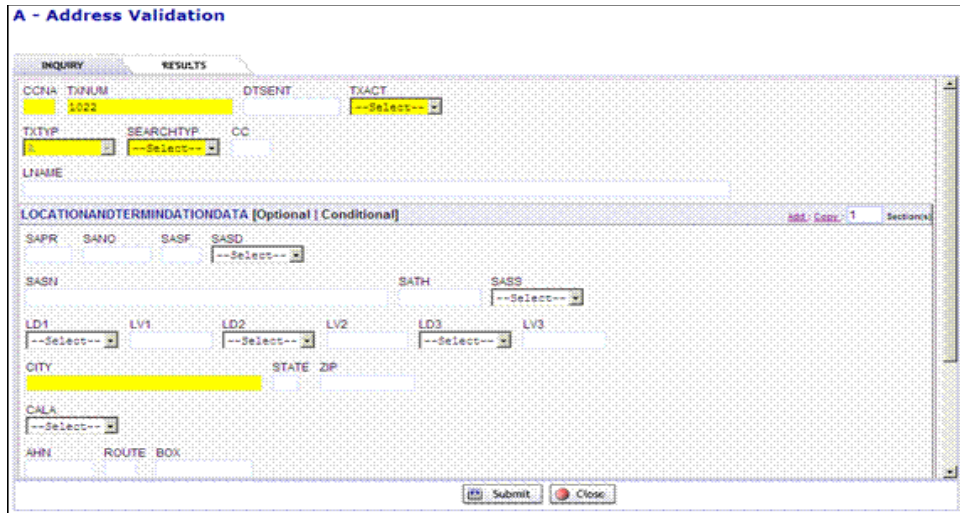


**Figure 47: Address validation**

4. Populate the fields with relevant search criteria. Yellow fields are required.

5. Click **Submit**. The returns are displayed in the PreOrder Response window.

   For large responses, to view the entire response you may need to use the pagination provided for each section containing more than 10 items.
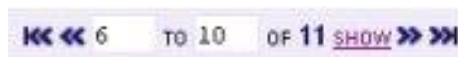


**Figure 48: PreOrder pagination**

   Enter the number of records you want displayed at any one time for that section and click the SHOW link. The default is to show up to 10 items at a time before needing to move to the next page.

   Click the outside arrows to move to the first or last page.

   Click the inside arrows to move page by page. To modify the PreOrder Request, click the Inquiry tab. This re-opens the PreOrder Request.

6. If you want to modify the PreOrder Request, click the Inquiry tab. This reopens the PreOrder Request.

7. Click the **Change** button to edit fields.

8. Make the desired changes and click **Submit** to resubmit the PreOrder Inquiry.

## Save Local PreOrder Response

VFO allows you to store the PreOrder Inquiry and Response transactions.

Use the following procedure to save Inquiry and Response transactions.

1. Execute a PreOrder Inquiry. Make sure you are in the PreOrder Response window.

2. Scroll to the bottom of the window and click **Save**.

## Print Local PreOrder Response

Use the following procedure to print from the PreOrder List.

1. Execute a PreOrder Inquiry. Make sure you are in the PreOrder Response window.

2. Click **Printable Version** to open a new window with a version of the Response that is better formatted for a printer.

3. Click **Print**. The Print dialog box opens allowing you to print based on your print configuration.

## Search Local PreOrder Responses

VFO allows you to view the details of a previously completed PreOrder Response.

 Use the following procedure to view PreOrder Response details.

1. Log into VFO and select the Local module. The Local Order List page opens.

2. Hover your cursor over the PreOrder tab. A dropdown menu opens.

3. Execute the PreOrder > Search menu command. The PreOrder Search page opens.

4. Users can perform the search using the following criteria:

    ☐ **TXNUM**: This number was either generated by the system or by the user.  Using this field is the most direct way of locating a PreOrder.

☐ **Trading Partner**: This dropdown will contain all the Trading Partners that have been configured for use in this module.

☐ **TX Type**: The Transaction Type will be determined by the selected Service Center.

☐ **TX From Date and TX To Date**: These fields define the beginning and the end dates for the search.

☐ **Go:** Click this button to submit the search criteria and view the returns.

☐ **Clear**: Click this button to refresh the screen and empty all the populated fields.

5. Enter the appropriate search criteria.

6. Click **Go**. The results will display in the bottom half of the window.

## Validating PreOrder Business Rules

The SUBMIT command in VFO validates and submits LSR Pre-Orders against business rules. The validation request is sent to the Business Rule Management System which performs initial validations, service provider business rule validations, and ILEC specific business rule validations.

**NOTE: Executing the Submit command (by clicking the Submit button) automatically validates the Service Request.**

Use the following procedure to validate and submit a  service request.

1. Initiate a new pre-order query.

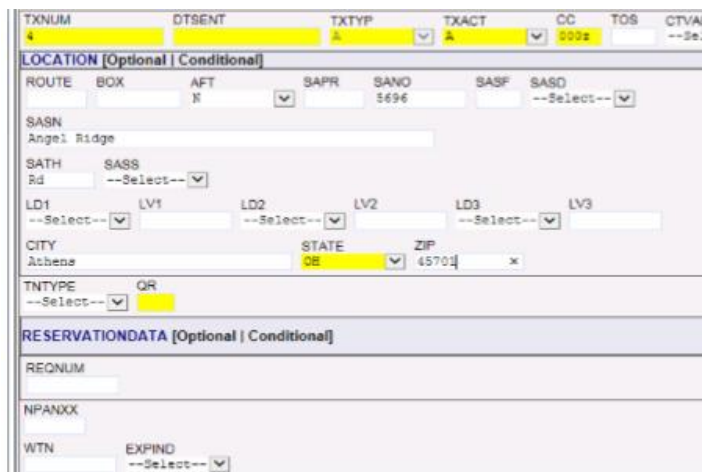2. Populate necessary fields.

3. Click the **Submit** button.



**Figure 49 : PreOrder Validation**

4.  Business rule errors are displayed to the user accordingly, when applicable.

# Create and Manage Outgoing Local Orders

This section reviews the following:

- Local Service Request Work List
- Creating Local Service Orders
- Validating Local Service Orders
- Supplementing Local Service Requests
- Searching Local Service Requests
- Filtering Local Service Request Order List
- Using the Save As command
- Supplement Vs. Resubmit Original Order
- Viewing the History
- Reverting to Last Saved
- Reverting to Last Submitted
- Viewing Error List
- Viewing Last Notification
- Voiding Orders
- Generating a Printable Version

## Local Service Request Work List

The Order List houses all the Local orders created in the application and all the responses received.

- The PON is a link to the order detail in read/write mode.
- The Version is a link to a read only view of the order.
- The Status is a link to the response details returned from the Trading Partner.

Orders that have been reassigned to a new owner are displayed with a darker shade of gray.  Orders with the Owner's name shaded pink indicates that the owner has been deleted from the application.

### Local Module Specific Action Icons

#### Clipboard

This icon allows users to generate a Summary of all the Responses from a particular order.  Please note that this icon is unique to Local Orders.

#### Work Status Icons

There may be an icon beside some of the Orders to indicate different work states. Following are what these icons indicate:

#### Flame

Order has been rejected by the Trading Partner. This is not due to Business Rule violations, as those would result in a different icon.

#### Green Check Mark

Order has been completed by the Trading Partner.

#### Red Bell

Order has Business Rules Violations. The violation(s) was detected in Exchange Path and stopped before it reached the Trading Partner.

#### White Check on Green Folder

Order has been confirmed. This means that the Trading Partner has accepted the order and is in the process of fulfilling it.

#### Red Exclamation Mark

Order is in Jeopardy. This could be due to any number of reasons, from a delay in a process required to a lack of resources.

#### Red Hand

The order has received a Directory Service Confirmation & Error Detail.

#### Train Tracks

Order is Tracking Only. This means that the order was placed outside the VFO system and the information within VFO is simply used for

tracking purposed. Please note that this status is not related to status changes.

## Create a Local Service Order

Use the following procedure to create a Local Service Request order.

1. Login to VFO and select the Local module. This opens the Local Order List page.

2. Hover your cursor over the Order tab. This reveals the Order menu.

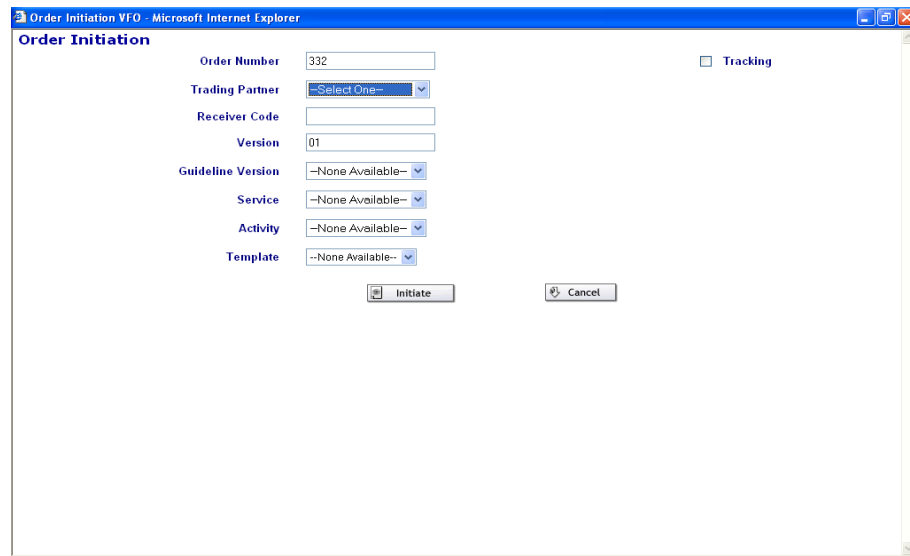3. Execute the Order > New menu command. This opens the Order Initiation page.



**Figure 50: Local order initiation page**

4. If the CLEC is configured for OCN functionality, then the below page will appear.
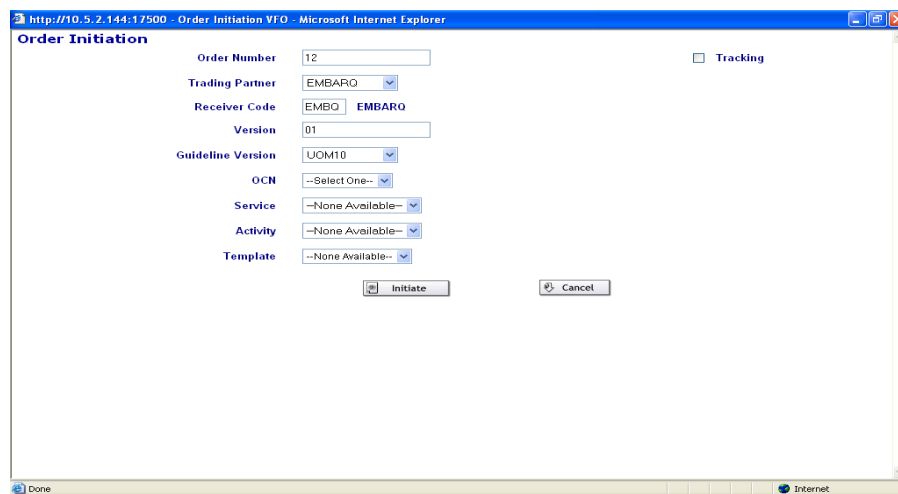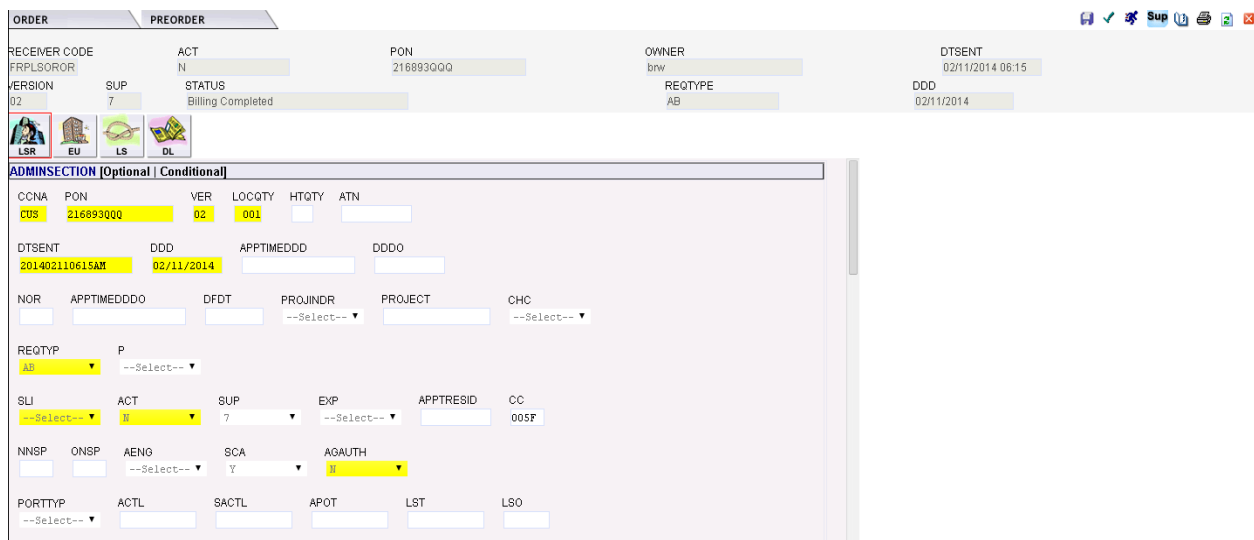


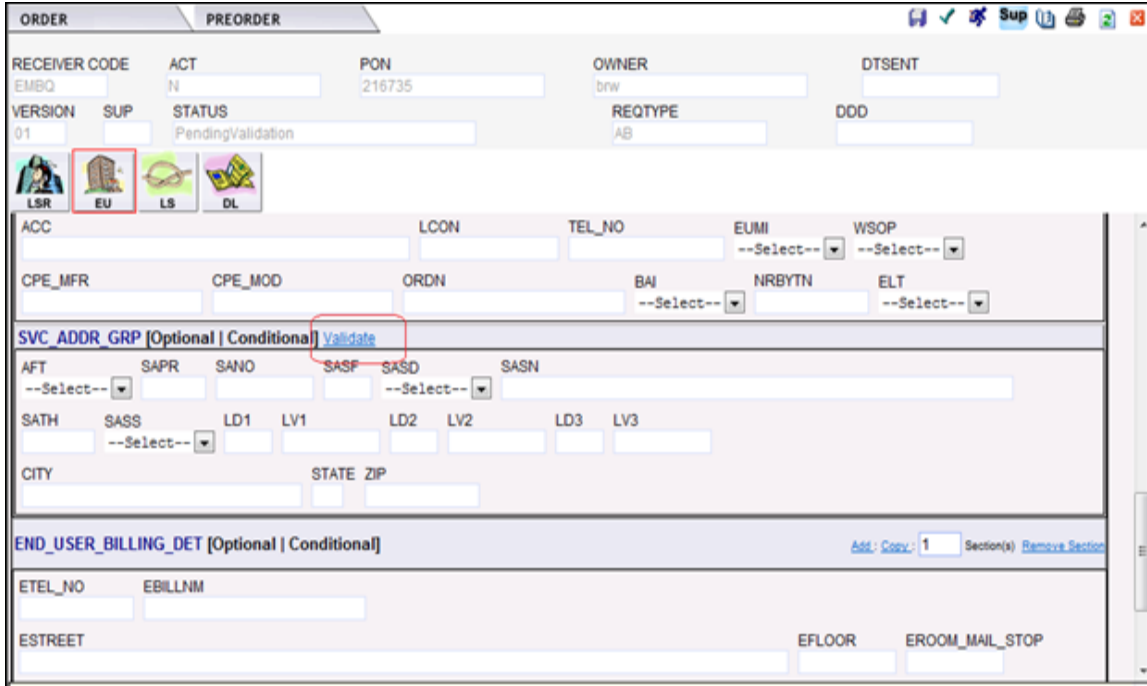**Figure 51: Local order initiation page**

5. The system will generate an Order number.  Users can enter a different Order number, if they choose to do so.

6.  Select a Trading Partner. This generates the Trading Partner's Receiver Code and the guideline version supported.

7.  Enter a new Version value or leave the system generated version.

8.  Select the OCN (only for OCN configured CLECs) from the list, the first OCN code from the dropdown will be the primary and the rest will be secondary. The OCN selected on the Initiation page will be pre-populated on to the CC field on the LSR form.

9. Select a Service. This generates a list of activities available for that service.

10. Select an Activity.

11.  Optionally, select a Template.

12. Click **Initiate**. This opens a new Service Request Order form.



**Figure 52: LSR order page**

13. Populate the fields. If a section is required, its header will display the word Required.  At a minimum, fields within that section are required, they will be highlighted in yellow.  Additional fields may be required as per the type of request.

14.  The address can be validated without leaving the order by populating the address field and clicking the **Validate** link next to the section header.

**Figure 53: Address Validation for LSOG UOM10**

The response for the above Address Validation may be any of the following:

14.a **Exact Match**:  If the values entered in the section have an exact match, then the below response will be displayed.
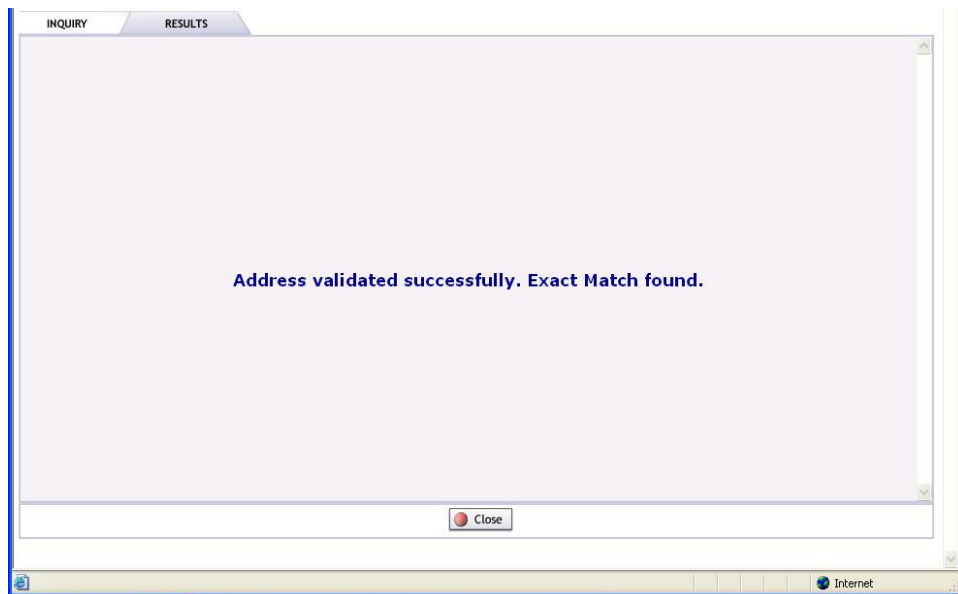


**Figure 54: Exact Match**

14.b **Near Match**:  For LSOG UOM customers, if the values entered in the section have one or more near address matches, then the below response will be displayed with the list of all near match values. Users can select one of the addresses by

clicking the **Use Address** button. This will pre-populate the LSR order address fields.



**Figure 55: Near Match for LSOG UOM10**

14.c **No Match**: If the values entered in the section have no match, then the below response will be displayed.



**Figure 56: No Match**

15. Browse through each of the remaining forms and repeat the previous step.

NOTE: Click the Save icon in the upper-right corner of the page if you intend to validate or submit the order later.

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16. Click the **Submit** icon. Executing the Submit command validates the service request order against the business rules.

NOTE: **You can also Save, Submit, and Validate by clicking the Order tab and executing that function through the menu command.**
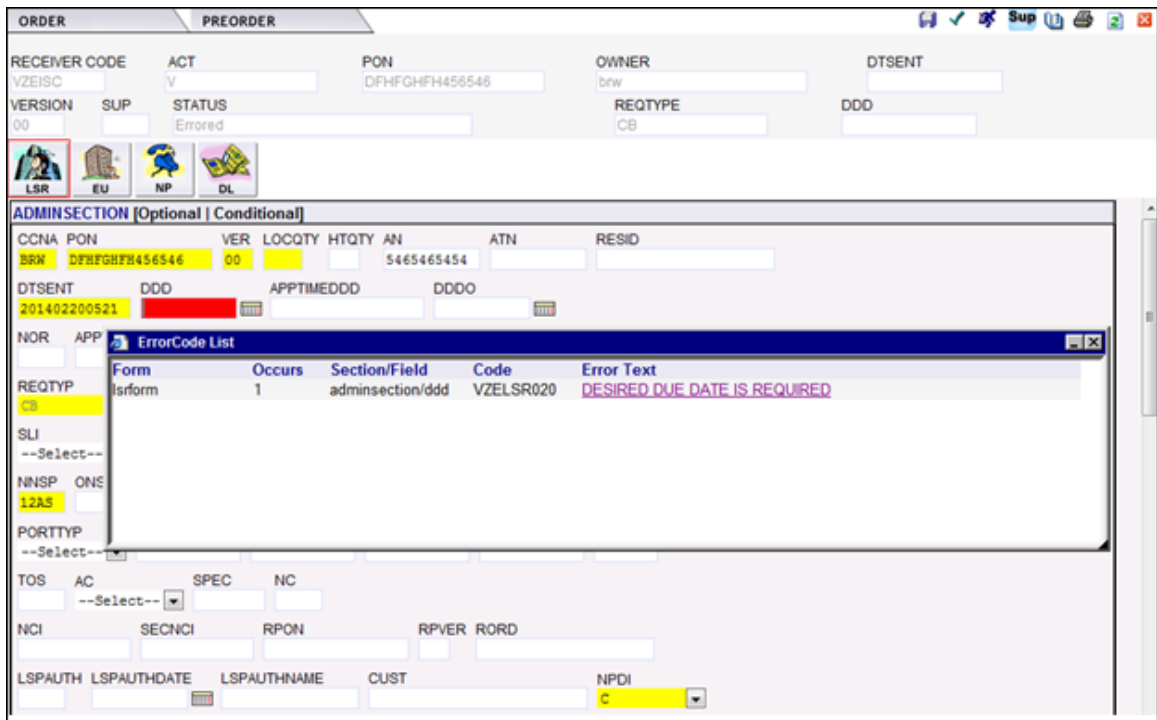
## Validate a Local Service Order

The Validate command in VFO validates Service Request Orders against the business rules. The validation request is sent to the Business Rule Management System which performs initial validations, service provider business rule validations, and ILEC specific business rule validations.

NOTE: **Executing the Submit command (by using the menu command or by clicking the Submit tool) automatically validates the Service Request.**

Use the following procedure to validate a service request.

1. Click the link in the PON column, on the Order List page, to open the applicable Service Request. This opens the Service Request order.

2. Click the **Validate** icon in the upper right corner of the page or execute the Order > Validate menu command. Violated rules are displayed in the Error Code List window.



**Figure 57: Error code list**

3. Click the link in the Error Text column. This links you to the violated field.

**NOTE: The errors in the figure above only refer to specific fields. If entire forms or sections are in error, users will need to manually navigate to the form or section to make corrections.**

4. Refer to the Form and Section/Field columns to determine the location of the violating field. Refer to the Occurs column to determine how many occurrences of the violation are in the Request.

5. Make the required changes.

6. Click **Save**.

## View Error List

VFO allows you to view the errors that were found in the Order. Violated rules are displayed in the Error Code List in a pop-up browser.

Open the Service Request and execute the Order > View > View Error List menu command to view the errors.

Some of these errors will link to fields when clicked. Others will need to be navigated to manually.

## Local Service Request Supplement

VFO allows you to supplement Local Service Requests.

1. Hover the Order tab.

2. Select the Supplement menu command

3. If the LSR RPON field is populated in the version that is being supp'ed, a new pop-up window is displayed with the following alert: "The PON you reverted to/are supplementing has an RPON associated with it."

4. If the version is Alpha or Alphanumeric, you will be presented with a page to increment the Version and select a Supplement Type.



**Figure 58: Supplement new version**

5. If the version is numeric, you will be presented with the same page, but the system will increment the version for you.

## Tracking Local Service Requests

Tracking is only to be used if your request is not to be submitted to the Trading Partner. Tracked orders are visible only on the customer's order list.

## Search Local Service Requests

VFO's Search functionality allows you to search for every occurrence of specific values in Service Requests. You can extend your search by using the wildcard (%) character.

Use the following procedure to find specific Service Requests.

1. On the Order List page, execute the Order > Search menu command. This opens the Search dialog.
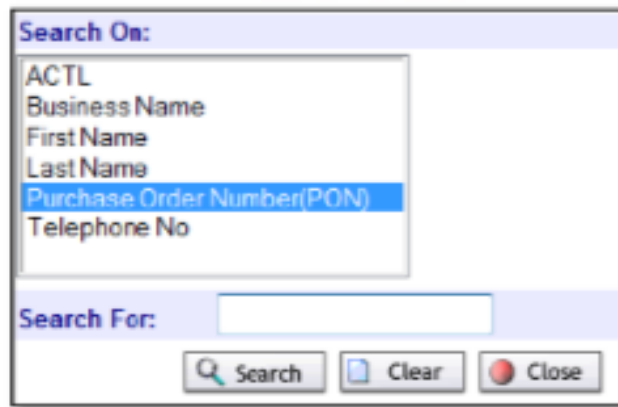


**Figure 59: Search page**
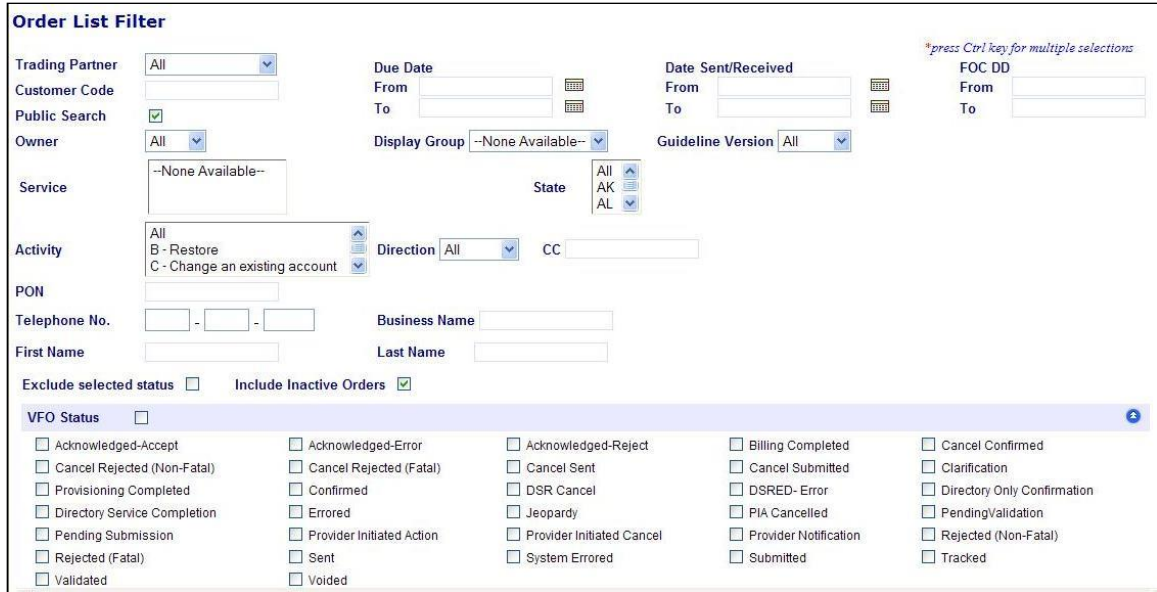
2. Select the criterion on which you want to search.

3. Enter the value you wish to search for in the Search For field. This field is not case sensitive.

4. Click **Search**.

## Filter Local Service Request Order List

The Filter function allows you to limit the selection of orders displayed in the Order List. The system saves your filter settings and applies them to future VFO sessions. Your Order List filter settings will open as part of the login process.

Use the following procedure to filter the Local Order List.

1. At the Order List page, click **Filter** (the icon that resembles a funnel). This opens the Order List Filter window.

**Figure 60: Order list filter**

2. Select the items you want displayed on your Order List, or check the Exclude checkbox, which allows you to display all items except the items you have checked.

3. Click **OK**. The resulting Order List only contains the items matching your selections.

4. By clicking the checkbox next to the header of a subsection, you select all the statuses within it.

5. Some of the available filter options may be minimized into their headers. By clicking the blue downward arrow   you can open these sections up. Minimizing them is accomplished by clicking the upward facing arrow.

NOTE: Click the Clear button the Order List Filter window to erase all previous selections.

Below is a list of the statuses included in the Filter and their meaning:

| Status | Description | User Action |
|---|---|---|
| Acknowledged - Accepted | The request has passed the TP initial validation of the request. | Wait for Confirmation |
| Acknowledged – Rejected | The request could not be processed by the TP's initial system. | Contact your System Administrator |
| Acknowledged – Error | The request has failed the TP initial validation of the request. | Review error and take recommended action |
| Billing Completed | TP has completed the billing process and will be generating a bill for services rendered. | No action required |
| Confirmed | TP has returned a confirmation message for that LSR. | Review Response |
| Cancel Confirmed | The Trading Partner has confirmed canceling an LSR; Exchange Path has updated the status, stored the message in the Exchange Path Database, and sent a notification message to VFO. | No action required. |
| Cancel Rejected (Non-Fatal) | The Trading Partner has returned a negative rejection acknowledgment for a cancellation. This reject is not fatal to the request and in most cases, you can supplement the request to correct the error. | View the Reject Reason and take the recommended action. |
| Cancel Rejected (Fatal) | The Trading Partner has returned a negative rejection acknowledgment for a cancellation. This reject is fatal to the request and in most cases, you cannot supplement the request to correct the errors. | View the Reject Reason and take the recommended action. |
| Errored | LSR has failed the Exchange Path validation process. | Correct Rule Error and Validate again |
| Jeopardy | Indicates there are situations that may jeopardize critical dates of the LSR (PON). | Review Response and take recommended action |
| Pending Submission | The VFO application is unable to communicate with the gateway application. As soon as communication is restored, the request will be sent. | Contact your system administrator |

| Status | Description | User Action |
|--------|-------------|-------------|
| Pending Validation | An initial request or a change to a request has not been sent to Exchange Path for validation or submission to the Trading Partner. After validation, the resulting response from Exchange Path will be Validated or Errored. | Complete the order, validate and submit request |
| Provisioning Completed | TP has completed the provisioning of the service. | No action required |
| Rejected (Non-Fatal) | TP has returned a negative (rejection) acknowledgment.   This reject is not fatal to the request and in most cases, you can supplement the request to correct the error. | Review Response and take recommended action |
| Rejected (Fatal) | TP has returned a negative (rejection) acknowledgment that is fatal to this request.  In most cases, you cannot supplement the request to correct the errors. | Review Response and take recommended action |
| Sent | Exchange Path has sent the request to the TP, updated the status, and sent a notification message to VFO. | No Action |
| Submitted | This message indicates that an initial request or a change to a request has been sent to Exchange Path for validation and subsequent processing.  As soon as the request is electronically processed, the status will change to "Sent." | No Action |
| System Errored | VFO has received a system error message from Exchange Path. | Read the error and Submit Order again. Contact your System Administrator to alert them of the issue if it continues. |
| Tracked | The order was initiated as a Tracking Only request and will not be transmitted to the Trading Partner. This is used when the order was sent manually outside of VFO and you want to track the order progress manually in VFO. | No Action |
| Validated | Exchange Path returns a validation successful message. | Submit Order |
| Voided | VFO user has placed the LSR in this status to indicate that this request should not be transmitted to the Trading Partner. | No Action |

## View Last Notification

You can link to the Order in its most recent status by clicking the link in the Status column that corresponds to the Order you want to view.

## Generate Local Service Request Response Summary Report

After a Service Request receives a Response, you can use the Summary Report to view the key information provided in that response. For example, after you receive a Firm Order Confirmation, the Summary Report will detail the Due Date information based on the Response. The Summary Report function is enabled for the following statuses:

| | | |
|---|---|---|
| Acknowledged | Provisioning Completed | Rejected (Fatal) |
| Confirmed | Billing Completed | Jeopardy |
| Rejected (Non-fatal) | Confirmation | |

Use the following procedure to generate a Response Summary Report.

1.  Check the checkbox of the PON for which you will generate a Summary Report.

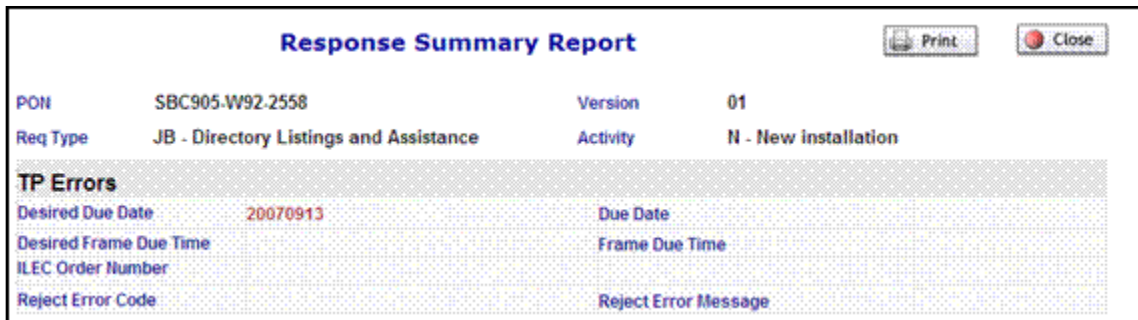2.  Click the Summary icon, , on the Local Order List page.



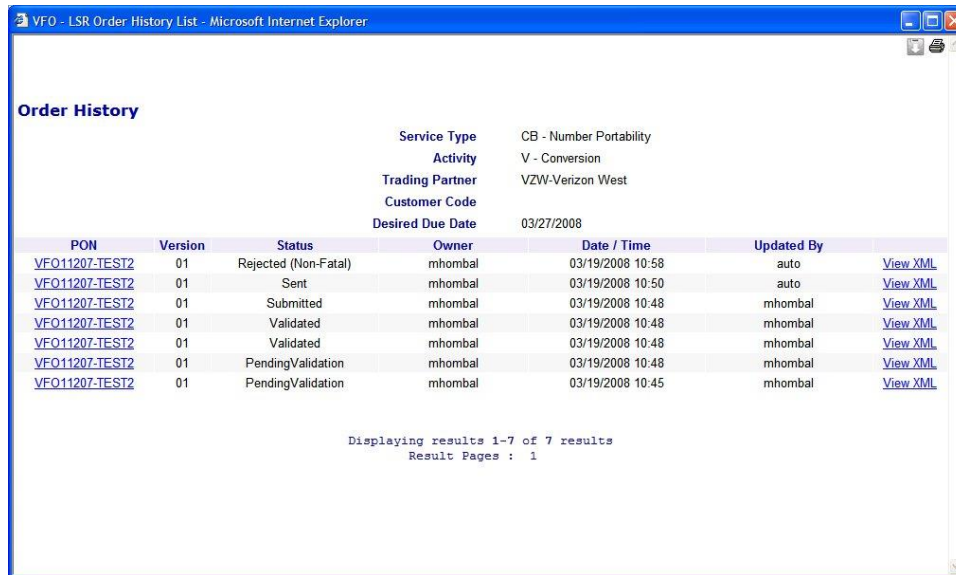**Figure 61: Response summary report**

3.  Optionally click the Print button to print the Response Summary Report.

## View the History

Use the following procedure to view the history of a Service Request order.

1.  Log into Local module. VFO opens on the Order List page.

2.  Click the radio button that corresponds to the desired Order.

3.  Click the History icon. This opens the Order History page where you can view and print the history of the selected Service

Request. You can also download the XML generated for each item in the Order History screen.



**Figure 62: Order history**

## Save As a Local Service Request

VFO allows you to save a copy of the selected or current Service Request under a different PON. You can execute the Save As command from the Order List page or from within an existing Service Request.

Use the following procedure to save an existing Local Request as another Local Request.

**NOTE: If you are using the Save-as command from the Order List page, you must first click the radio button of the order you want to copy.**

1. Execute the Order > Save As Order menu command. This opens the Save as New Order window.



**Figure 63: Save as new order**

2. Enter the new, unique PON.

3. Click **Save**.

If you are performing a Save As from within an existing Service Request, open the Service Request you want to copy and execute the Order > Action > Save As Order menu command.

## Supplement Orders

If you need to send another version of the order to indicate a change, you will use the Supplement function.

1. Execute the Order > Supplement menu command or click the Supplement icon, displayed as "Sup" in a circle.
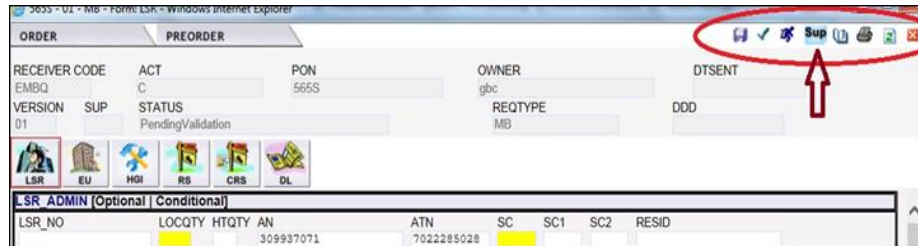


**Figure 64: Supplement LSR Order**

2. Indicate a version (if not auto populated) and supplement type.



**Figure 65: Supplement others version selection**

3. Click Change.

4. Make the required changes to the order.

5. Execute the Order > Validate and Submit menu command or click the Submit icon.

## Visual Notification for RPON

An alert will be generated if the user modifies (i.e., supplements) an LSR that has been successfully submitted if the version of that LSR had the RPON field populated.

1. VFO user logs in and initiates a sup against a LSR that was previously submitted to the TP

2. If the LSR.RPON field is populated in the version that is being supp'ed, a new pop-up window is displayed with the following alert: "The PON you reverted to/are supplementing has an RPON
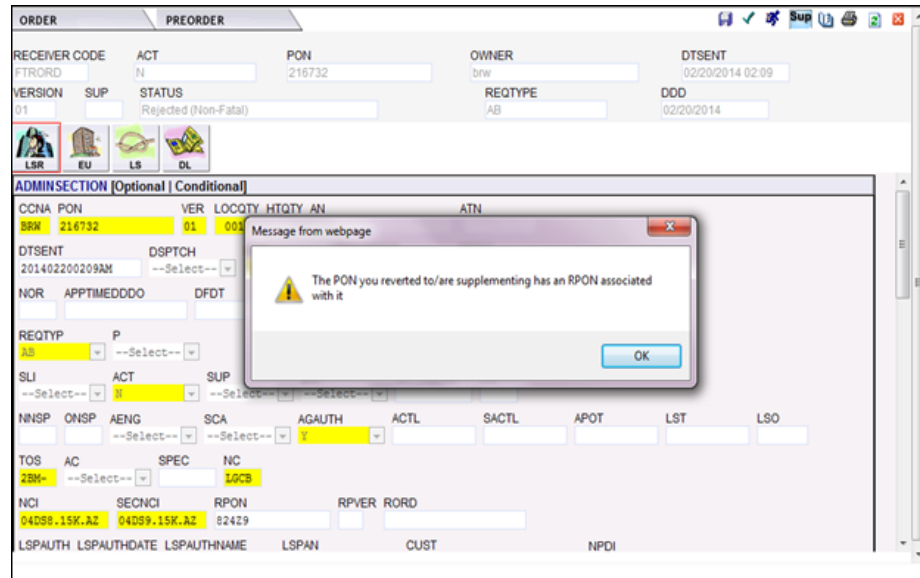


**Figure 66: RPON Visual Notification – LSR**

3. User clicks on the OK button,
4. SUP pop-up window is displayed, user proceeds with populating the Version field and clicks on the Change button and proceeds with supplementing the order

## Visual Indicator for RPON

If a local order has an associated RPON field populated, then a new icon 'R' will be displayed in the Order list to distinguish PONs with the RPON field populated. In the even there is more than one version for a PON, the RPON icon will be displayed if the latest version has the RPON field populated.

**Figure 67 - Visual Indicator for RPON**

## Revert to Last Saved

You can create responses and choose to save them. Then you can use the History screen to open the last saved version of the response or revert to an earlier saved version. Click the PON next to the response you want to view, modify, transmit, etc. Once you click Save, Validate, or Submit this response becomes the current response.

## Revert to Last Submitted

If you modify a Service Request after you successfully submitted it (i.e., started a supplement request), you can return to the previously submitted version of the Service Request by executing the Order > Revert > Revert to Last Submitted command. This command restores the previously submitted version of the Request even if you executed the Save command to save those changes.

## Void Service Requests

VFO allows you to void a Service Request for any reason, as long as the Service Request has not been sent to the Trading Partner. This also includes orders that have been submitted but received a System Error.

When the initial orders have been rejected by the trading partner, the order can be voided in VFO. However, if the order has been supplemented it cannot be voided.

To void a Service Request:

1. Open the Service Request.

2. Hover the Order tab.

3. Click the Void menu command.

## Inactivate and Activate Orders

All active orders created in the application are stored in the Order List by default.  Orders are considered Active unless a user specifies otherwise.

The only orders not displayed with the default filter are "Inactive" orders, however you can choose to include those orders in the Order list by checking the check box "Include Inactive Orders."

### Inactivating Orders

Orders became "Inactive" when a user applies this label to the order. To indicate an order is inactive the user:

1. Opens the Order by clicking the PON in the Order list.
2. Hovers over the Order tab.
3. Selects the menu options Edit > Inactivate Order.
4. The status of the order will be appended with the word "/Inactive."

The functions available on an inactive order are the same for an active order sharing that same status.

### Activating Orders

To make an Inactive order Active:

1. Click the PON in the Order list to open the Order.
2. Hover over the Order tab.
3. Select the menu options Edit > Activate Order.

The "/Inactive" text will be removed from the order status and it will appear on the Order list when the default filter criteria is used.

## Printable Version

The Printable Version command in VFO displays the current Service Request in a format that is friendlier to your printer.

From the Service Request page, execute the Order > View > View Printable Version menu command. A new window opens that displays the fields of the Service Request without the application controls.

Use the browser's print tool to print the window.

# Working with Templates
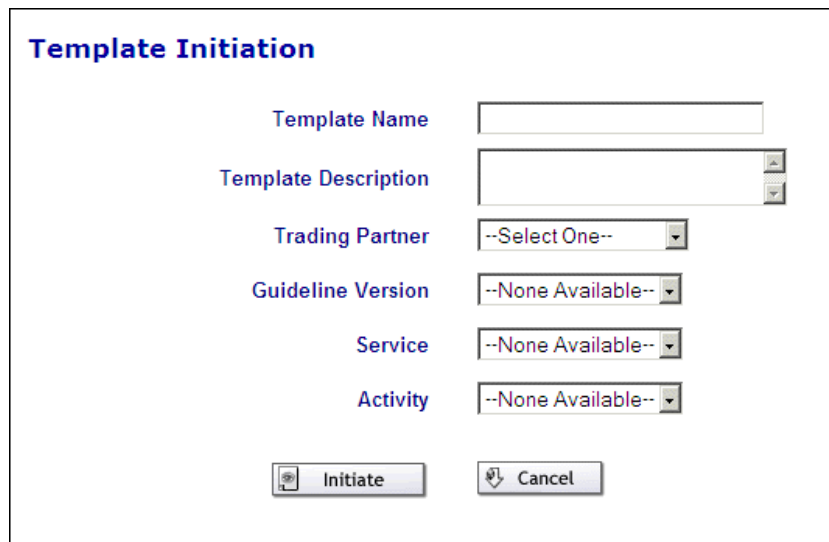
This section reviews the following:

- Creating Templates
- Saving Templates
- Applying Templates After Order Initiation
- Searching for Templates

## Create a Template

Templates use common data values to pre-populate orders, thereby reducing or eliminating redundant data entry and the attendant errors. VFO lets you tailor your own templates for every type of Service Request, as well as give you the ability to modify, update, or delete an existing template from VFO.

Use the following procedure to create a template.

1.  Login to VFO and select the Local module. This opens the Order List page.

2.  Hover your cursor over the Template tab. This reveals the Template menu.

3.  Execute the Template > New menu command. This opens the Template Initiation page.



**Figure 68: Template initiation page**

☐ **Template Name** - Enter a user-defined, unique name for the template.

☐ **Template Description** - Enter a user-defined value that describes the template.

☐ **Trading Partner** - Select a service provider to display their available Service Centers.

☐ **Service Center** - Select a Service Center to generate a list of their available versions.

☐ **Guideline Version** - Select a version.

☐ **Service** - Click this dropdown menu to select the Service Type for the negotiation of the service request.

☐ **Activity** - Click this dropdown menu to identify the activity involved in this service request.

☐ **Initiate** - Click this button to submit the values entered on this page and add the new template to the list of available templates.

☐ **Cancel** - Click this button to ignore the values entered on this page and return to the Order List page.

4. Populate the Template Initiation page.

5. Click **Initiate**. This opens the shell of an order, update or trouble ticket, depending on the module you are logged into.

6. Populate the fields with common data values that, when selected, will pre-populate a new form.

7. Click the Save icon in the upper-right corner of the page. This saves the values to the database.

## Save As Template

Another way to create a template is to execute the Save As Template menu command. This command is available in the Order menu on the Order List page and in the Order menu on the Service Request.

Use the following procedure to save a Service Request as a template:

1. If you are on the Order List page:

   a. Click the radio button of the Service Request you want to use as a template.

   b. Execute the Order > Action > Save As Template menu command.

2. If you are in the Service Request:

   a. Execute the Order > Action > Save As Template menu command.

3. Either of these commands opens the Saved Order as New Template window.

4. Enter a unique value in the Template Name field.

5. Click **Save**.

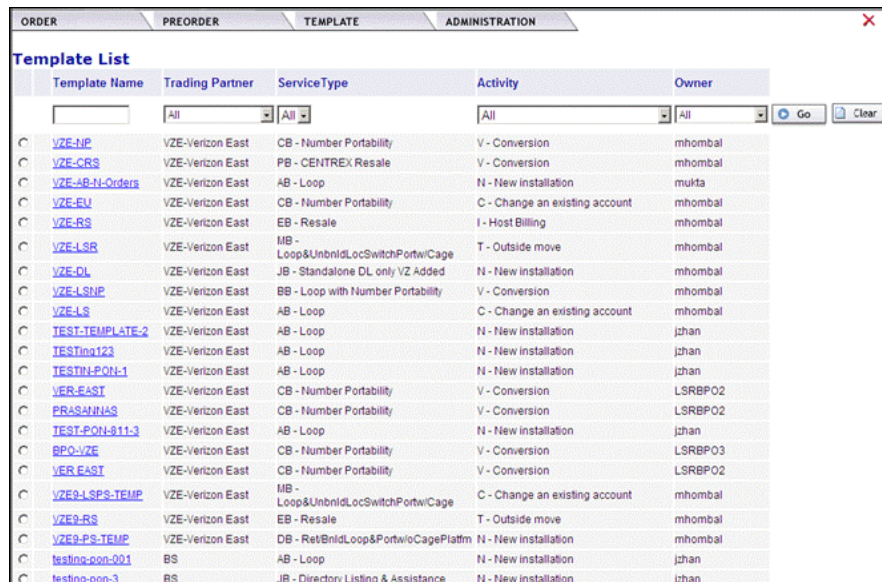## Apply Template after Order Initiation

The Apply Template command populates blank fields of a Service Request with the respective values of the selected template. Use the following procedure to apply a template from within a Service Request Order form:

1. Initiate a Service Request.

2. Execute the Order > Edit > Apply Template menu command. This opens the Apply Template window.

3. Select the desired template from the dropdown menu.

4. Click **OK**.

## Search for a Template

Use the following procedure to search for a template.

1. Login to VFO and select the module. This opens the Order List page.

2. Hover your cursor over the Template tab. This reveals the Template menu.

3. Execute the Template > Search menu command. This opens the Template List page, which lists all available templates.



**Figure 69: Template list**

☐ **Template Name** - Enter the name of the template, and then click **Go** or click the template name link to search on that value.

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☐ **Trading Partner** - Enter the value that identifies the service provider in this service request, then click **Go** to search on that value.

☐ **ServiceType** - Enter the value that identifies the type of service and then click **Go** to search on that value.

☐ **Activity** - Enter the value that identifies the activity involved in this service request, then click **Go** to search on that value.

☐ **Delete** - Click a radio button(s) that corresponds to the template to remove, and then click the red X in the upper right corner of the page to remove a template from the Template List and the database.

☐ **Go** - Click this button to submit the search criteria entered on the page to the Template database.

☐ **Clear** - Click this button to remove the search criteria from the fields on the Template List page.

**NOTE: Executing the Clear command does not clear radio button selections.**

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# Trouble Administration Module

# Trouble Administration

This section reviews the following:

- Using the Trouble Administration Work List
- Viewing the Transaction History
- Creating a Trouble Report
- Creating Trouble Templates
- Modifying Trouble Reports
- Providing Additional Trouble Information
- Canceling a Trouble Report
- Late Bonding
- Escalating Requests
- Retrieving Trouble Info Requests
- Retrieving Trouble Report Status
- Verifying Repair Completion Requests
- Viewing Attribute Value Change Notifications
- Creating Mechanized Loop Tests
- Trouble Administration Contact Information

## Login Procedure

Use the following procedure to login to VFO.

1. Browse to the location of VFO by entering the following address in the Address field:

   https://vfo.frontier.com/
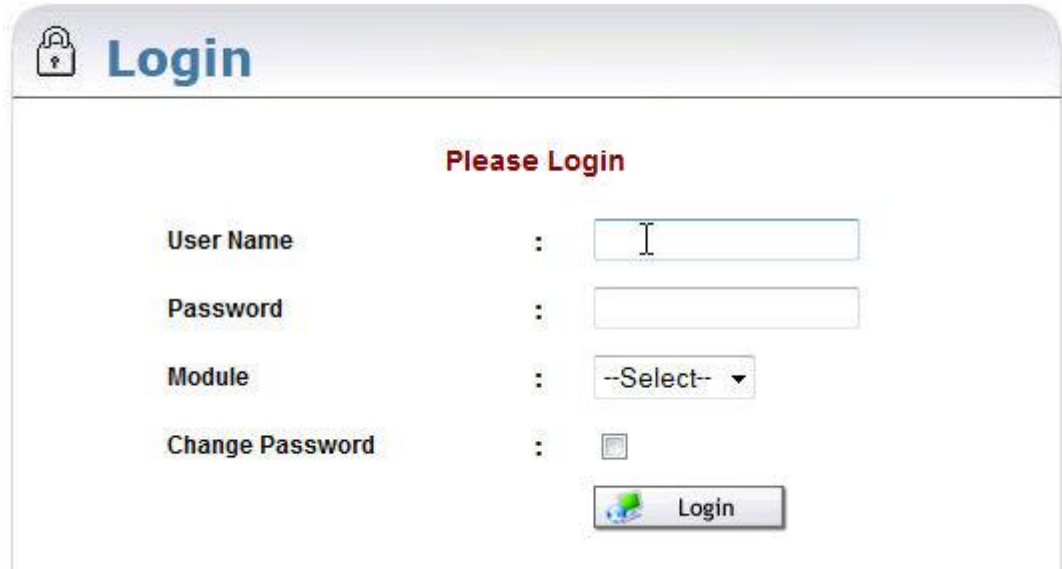
**Figure 70:  Login page**
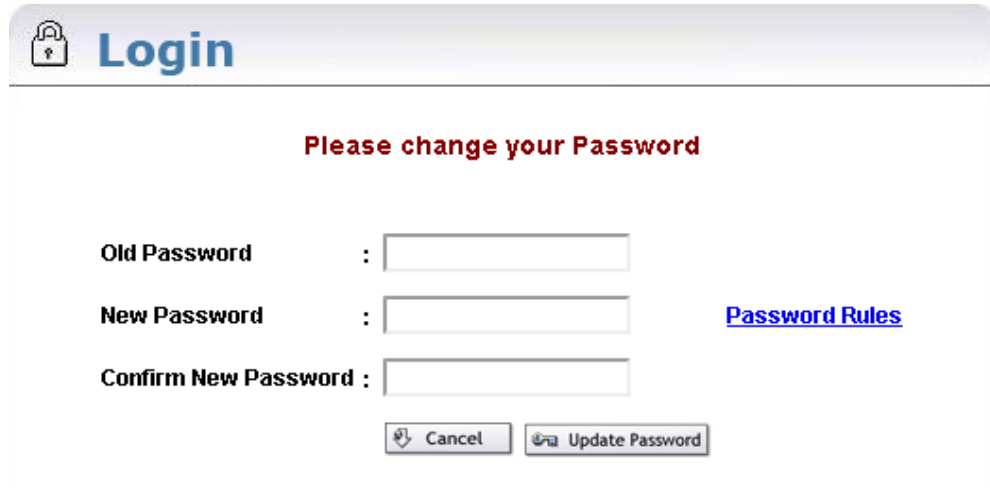
2. Enter a valid name in the User Name field.

3. Enter a valid password in the Password field.

4. Choose TA from the Module Drop Down list on the VFO sign in page.

5. Click the **Login** button.

**NOTE: You must use the User Name and Password provided by your system administrator.**

## Change Password

Use the following procedure to change the VFO Login password.

1. Browse to the location of VFO.

2. Enter a valid name in the User Name field.

3. Enter a valid password in the Password field.

4. Use the User Name and Password provided by company's System Administrator.

5. Click the dropdown arrow in the Module field.

6. Select the desired Module.

7. Check the Change Password checkbox.

8. Click the **Login** button.

**Figure 71: Change password page**

9. Enter the old password into the Old Password field.

10. Enter the new password into the New Password field.

11. Reenter the new password into the Confirm New Password field. The 'Password Rules' link mentions the criteria for choosing a new password.

12. Click the Update Password button.

13. Log in using the new password.

## Password Rules

The password rules are intended to maintain the system security by prompting users to provide strong passwords and use them appropriately.
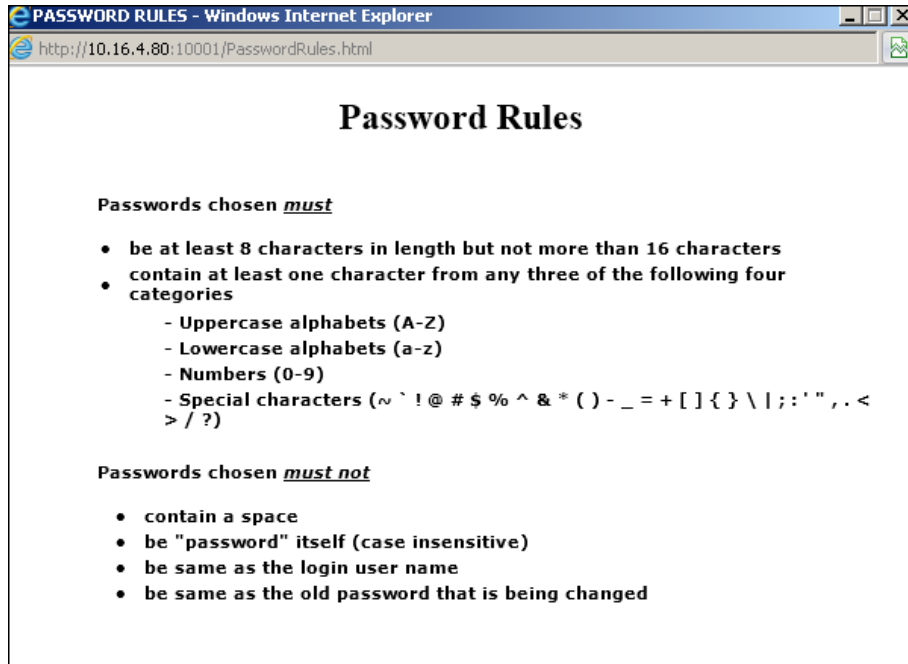
**Figure 72: Password Rules**

The Work List displays all of the tickets entered into the system. Each line represents a particular ticket and shows the Ticket ID, Time and Date Created, date/time last update received, Network ID, State and Status of the ticket, the Agent Trouble Report ID, the Customer Trouble Ticket number, the last tech assigned to the ticket, the trouble type and the Chronic column.

Newly added tickets are color coded so you can monitor the ticket's progress.  The ticket starts shaded green, then goes to yellow, and then to red.  The duration of the colors can be modified by the System Administrator.  The default is green for ten minutes, yellow for 30 minutes, and red for one hour, after which it has a white background.

**Figure 73: Trouble administration work list**

☐ **Ticket** - Hover over this tab to allow Users to create Trouble Tickets and reassign Trouble Tickets to other Users.

☐ **MLT** - Hover over this tab to access the Mechanized Loop Test function. This function is detailed in the last section of this chapter.

☐ **Search** - Hover over this tab to access the search functionality. This function will allow the User to perform a Trouble Report Search, a TA message search, an MLT search and an address search by ECCKT. This tab also allows Users to return to the most recent search performed during their session.

☐ **Template** - Hover over this tab to draft ticket information that can be applied to actual tickets.

☐ **Administration** - This tab only appears for those Users with access to Administrative functions. These Users can create new users, reset passwords, delete users, etc.

NOTE: The Last Assignment field is only populated after a Trouble Ticket has been reassigned.

Below are some **States** you may see in the Work List:

☐ Queued

☐ Open Active – status codes 1-12, 18, 19, 21-23, 34 or 35 might apply

☐ Deferred – status codes 13 - 17 might apply

☐ Cleared – status codes 20, 24, 25 or 26 might apply

☐ Closed – status codes 27 – 33 might apply

☐ Disabled

Below are some **Statuses** you may see in the Work List:

1. Screening
2. Testing
3. Dispatched In
4. Dispatched Out
5. ~~Pre Assigned Out~~
6. ~~Bulk Dispatched Out~~
7. ~~Start Repair~~
8. ~~Pending Test~~
9. Pending Dispatch
10. ~~Request Repair~~
11. ~~Refer Maintenance Center~~
12. ~~Refer Vendor~~
13. ~~No Access Other~~
14. Start No Access
15. Stop No Access
16. Start Delayed Maintenance
17. Stop Delayed Maintenance
18. ~~Trouble Escalated~~
19. ~~Craft Dispatched~~
20. ~~Temporary OK~~
21. Cable Failure
22. ~~Originating Equipment Failure~~
23. ~~Back Order~~
24. ~~Cleared/Customer not advised~~
25. ~~Cleared/Customer advised~~
26. Cleared Awaiting Customer Verification
27. ~~Closed Out~~
28. Closed Out by Customer Request
29. Closed Out Customer Verified
30. Closed Out Customer Denied
31. ~~Cancelled Pending Work in Progress~~
32. ~~Cancelled Pending Test Completion~~
33. ~~Cancelled Pending Dispatch Completion~~

**NOTE: Frontier Only supports these Status codes - 1, 2, 3, 4, 9, 14, 15, 16, 17, 21, 26, 28, 29, and 30**

There may be an icon in front of some of the tickets to indicate different work states. Following are what these icons represent:

**Double Vertical Bar**
Ticket is in "New" state. A ticket will be in the "New" State when it has been sent but has not received a "Create Response" from the Trading Partner or received a "Reject Response" or "Fallback Error". The ticket can be corrected and sent again by clicking on the radio button next to that ticket and choosing the "Create As" option from the "Ticket" drop down list.

**Reject Errors**

Below are some examples of Reject Responses that might cause the ticket to remain in "New" status. These errors are displayed in the Error Column in the Ticket History.

☐ **Resource Limitation** - Trading Partner OSS back end system is down and information cannot be sent/received.

☐ **Access Denied** – The Network ID and Account Name combination are incorrect.

☐ **No such Object/Instance** – If a transaction is sent to the Trading Partner on a ticket that is closed in their back-end system this error may be returned.

☐ **Must be Present Attribute Missing** – A required field is not populated on the Create Request.

☐ **Invalid Attribute Value** – A field is populated with incorrect data – i.e. hyphens in a telephone number field.

☐ **Missing Attribute Value** – A required field is not populated on a transaction sent after the ticket has been opened (after Create is sent and a good response received).

☐ **Cannot Verify or Deny at this time**– If a transaction is sent on a ticket in a state/status of "Cleared Waiting customer verification" or a Verify Completion transaction is sent to the Trading Partner but no AVC request to close was previously received from the Trading Partner for that ticket, this error message may be returned.

☐ **Trouble Report Change Denied** – When a transaction is sent on an open ticket but the ticket is not in the appropriate state/status for that type of transaction, i.e. an escalation request is sent on a ticket in cleared state.

☐ **Trouble Report Already Exists** – A Create is sent to the Trading Partner but they already have an open ticket on that circuit (may have been opened via a phone call).

**Fallback Errors**

Below are industry standard fallback error codes that might cause the ticket to stay in "New" status. (The values in bold type below are the ones most commonly returned.)

- **Circuit Mismatch**
- Create in Progress
- **Circuit Ownership**
- **Invalid State Code**
- Invalid Segment
- Leading Zeros
- New Service Pending
- **Circuit Disconnected**
- Invalid Company Assigning Code
- **Invalid Circuit Format**

**Clock**
Ticket has been "Deferred".

**Flame**
Ticket needs attention. The ticket has received a notification from the Trading Partner requesting authorization or closure of the ticket.

**Green Check Mark**
Ticket has been "Closed". The repair was successfully completed and the ticket has been closed by the Trading Partner.

**Red Bell**
Ticket has errors. The GUI Validation has found a violation in one or more fields and requires correction before the ticket can be successfully sent to the Trading Partner.

## Filtering the Worklist

The Worklist can be filtered to show only the trouble reports you are interested in viewing.  You can also use the filter to setup an auto refresh interval.  This allows you to monitor trouble reports when you are not actively using the application.

1. To access the filter, click the funnel icon in the upper right corner of the Worklist.

**Figure 74: Work List**

2. Select the criteria to apply to the Work List trouble reports.



**Figure 75: Work List Filter**

3. Click Apply.

**Note:** Display Groups are groups of users created by VFO Administrators. When a Display Group is selected the Work List will show only trouble reports created by those users that meet the other criteria selected.

## History

To view additional information on the tickets listed in the Work List, you can access the History section.  The History section can be accessed by clicking the icon that looks like an open book.



**Figure 76: Trouble report message history**

From the screen above, you can click the ID to access the Trouble Report Detail screen.  The Message ID is used to view the specific transaction details.

### Trouble Report Detail



**Figure 77: Trouble report detail**

Clicking the History Message ID displays the transaction response details.

**Figure 78: Verify repair completion request detail**



**Figure 79: AVC notification detail**

## Create a Trouble Report

Use the following procedure to create a Trouble Report:

1. Hover your cursor on the Ticket Tab and a drop-down list will be displayed.

2. Execute the Ticket>Create Trouble Report menu command. This opens the first page of the Create Trouble Report Request.
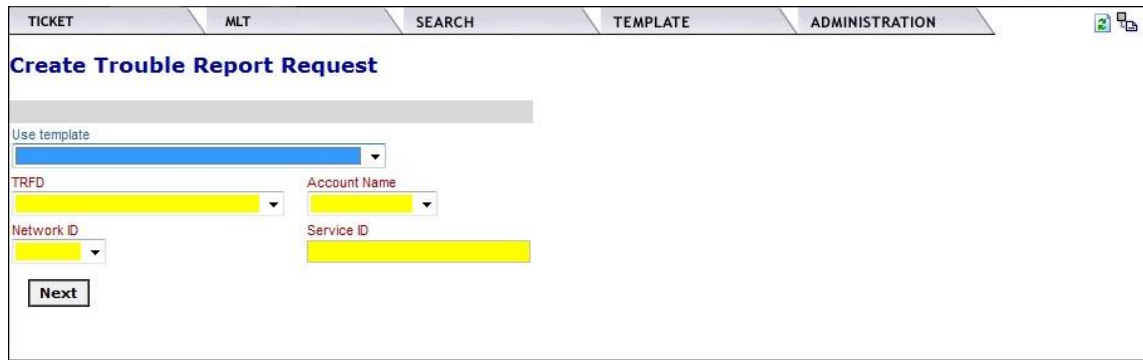
**Figure 80: Create Trouble Report Request**

3. Populate required fields on the Create Trouble Report Request page.

   ▢  **TRFD** is chosen depending on whether the service is POTS, a Circuit with a premise address, or a circuit without a premise address, such as a Message Trunk.

   ▢  **Account Name** is the identifier for your company that has been specified by the Trading Partner chosen in the Network ID entry.

   ▢  **Network ID** is the ID for the Trading Partner to whom the ticket will be sent.

   ▢  **Service ID** is the 10-digit telephone number or Circuit ID for the ticket that you are entering.

4. If you have a template, you can select the template applicable to the ticket you are entering, and then populate the remaining fields.

5.  Click **Next**. This opens the second page of the Create Trouble Report Request.
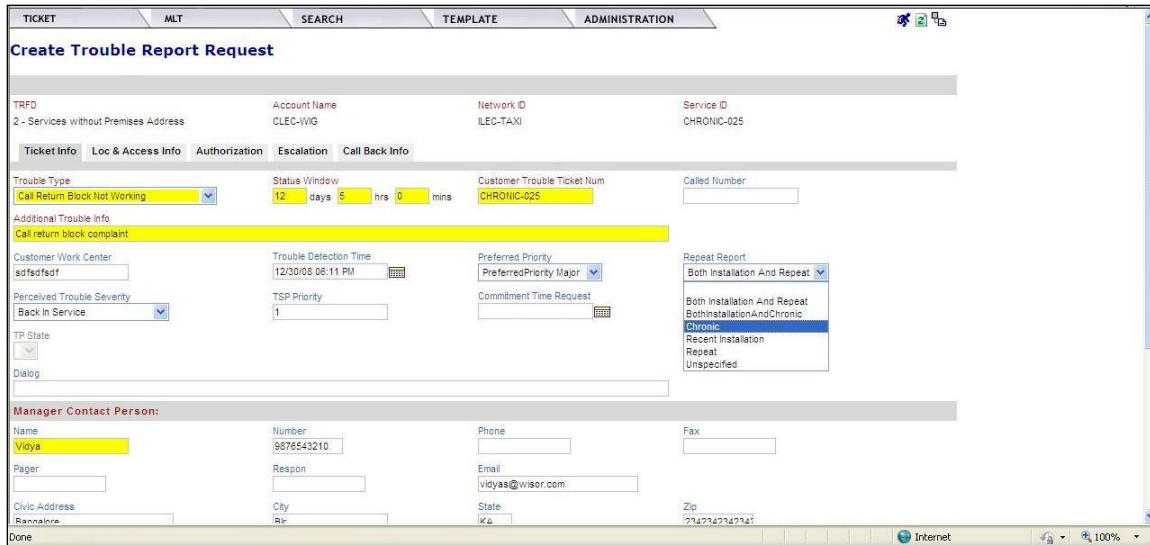
**Figure 81: Create trouble report request**

6.  Populate the relevant fields under the Ticket Info and Loc & Access tabs.

7.  If the Repeat Report field is populated with 'Chronic,' then the Chronic column in the work list will be populated with 'Y' else it will be populated with 'N'.

8.   The A Location Address under the Loc & Address Tab will be auto-populated when the customer has an Access/Local order in the VFO system and the Service ID is found on one of those orders that has been submitted and accepted by the Trading Partner.

9.  If the TRFD chosen on the initial Create Trouble Ticket Request page is a TRFD1 or TRFD2, you must populate the relevant fields under the Authorization and Escalation tabs.

10.   Click **Submit**.  VFO validates the information contained on the Report and generates a list of violations based on industry standard rules.  There are no Trading Partner specific rules to use to perform validation.
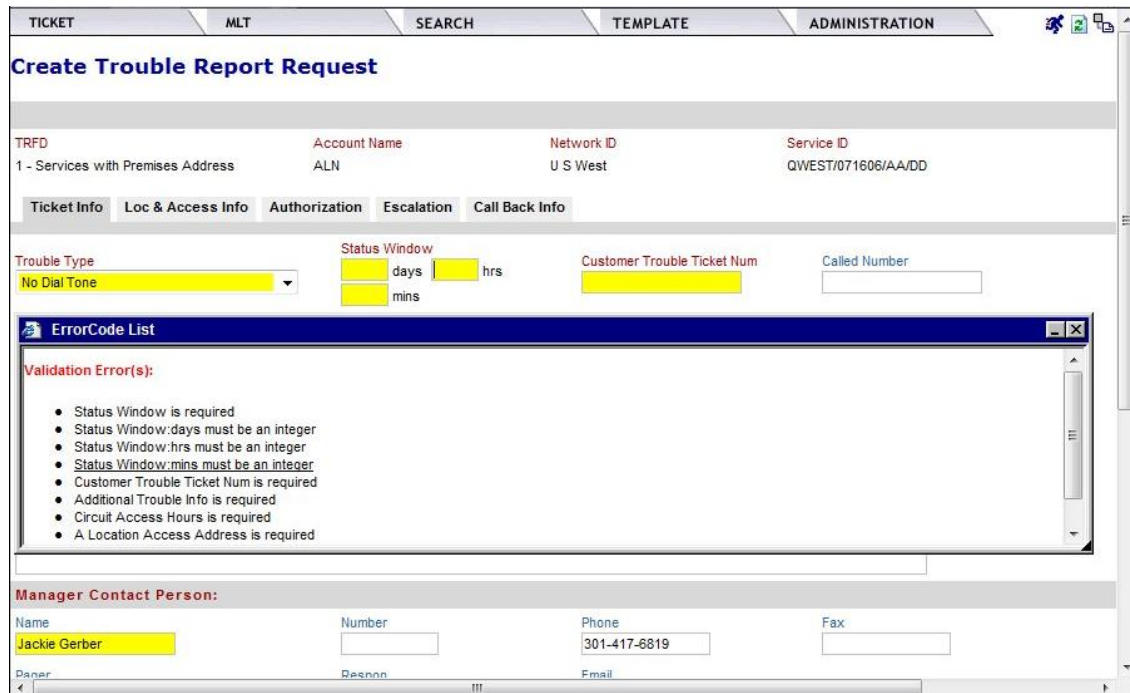
**Figure 82: Create trouble report request**

10. If the Report Request contains violations, click the violation(s) in the Validation Error(s) list to link to the field that needs correction. Once you have made all necessary corrections, click **Submit** again to send Report Request to the Trading Partner.

11. When the request has been accepted by the Trading Partner, a Create Response will be returned, and the Ticket will be updated with the Agent Ticket number and Trading Partner contact information. The Create Request and Create Response will be retained under the History tab. To see if a response has been received while you are still in the ticket, click the Refresh icon.

NOTE: **The users can also opt to pre-populate the address information from the Search by ECCKT results page, into the Trouble Report Initiation GUI. This will result in the auto-population of the TRFD, Account Name, Network ID, Service ID and Location Address fields in the new Trouble Report.**
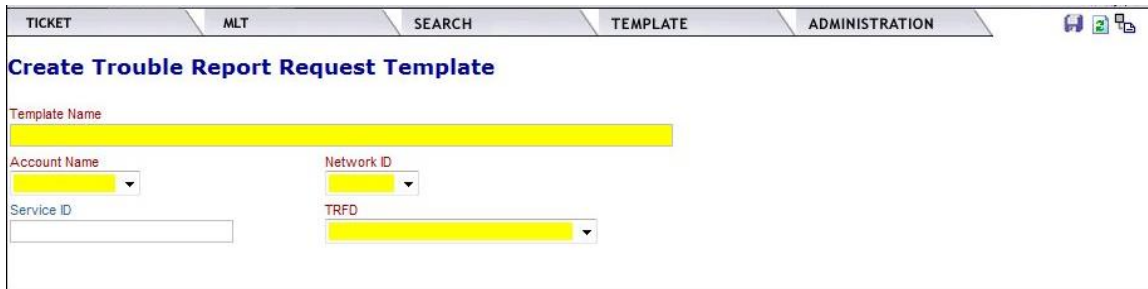
## Trouble Templates

Templates help save time by pre-populating data that is entered frequently on Trouble Tickets.

Use the following procedure to create Trouble Report templates.

1. Hover your mouse over the Template tab.

2. Click the desired template (e.g. New Escalate). This will open the template page.  Below is a template for creating a new Trouble Report Request.



**Figure 83: Create trouble report request template**

3. Populate the template with the frequently used data for that ticket transaction.

4. Click the **Save** icon at the top of the page.

## Modify Trouble Report

Use the following procedure to modify a Trouble Report Request.

**NOTE: The Report Request must be in Open status in order to be modified.**

1.  Click the radio button that corresponds to the Trouble Report Request you want to modify.

2. Execute the Ticket > Modify Attributes menu command. This opens the Modify Attributes Request page.
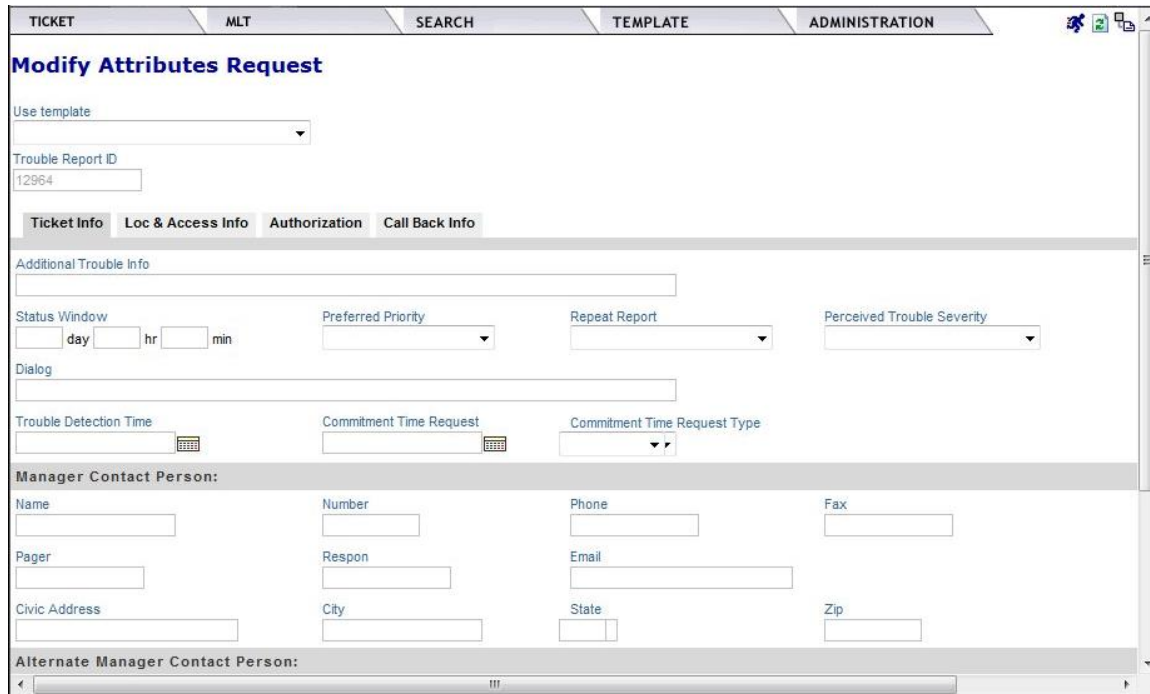
**Figure 84: Modify attribute request**

3. Make the desired changes.

4. Click **Submit**.

When the ticket is received and accepted by the Trading Partner, a Modify Response will be returned. The Modify Request and Response will be retained under the History Tab.

## Additional Trouble Information

Use the following procedure to submit additional information on a Trouble Report to a Trading Partner.

1. The Report Request must be in Open status in order to add information.

2. From the Work List, click the radio button that corresponds to the Trouble Report Request on which you want to add information.

3. Execute the Ticket > Add Trouble Info menu command. This opens the Add Trouble Info Request page.

**Figure 85:  Add trouble info request**

4.  Enter additional information as text.

5.   Click **Submit**.

When the Trading Partner receives the Add Info Request, a Modify Response will be returned. Both the Request and Response will be retained under the History tab and the information will be updated on the appropriate section of the ticket.

## Cancel Trouble Report

Use the following procedure to cancel a Trouble Report if the ticket was created by mistake.

1.   The Report Request must be in Open status in order to be cancelled.

2.  From the Work List, click the radio button corresponding to the Report Request you want to cancel.

3.  Execute the Ticket > Cancel menu command. This opens the Cancel Trouble Report Request window.
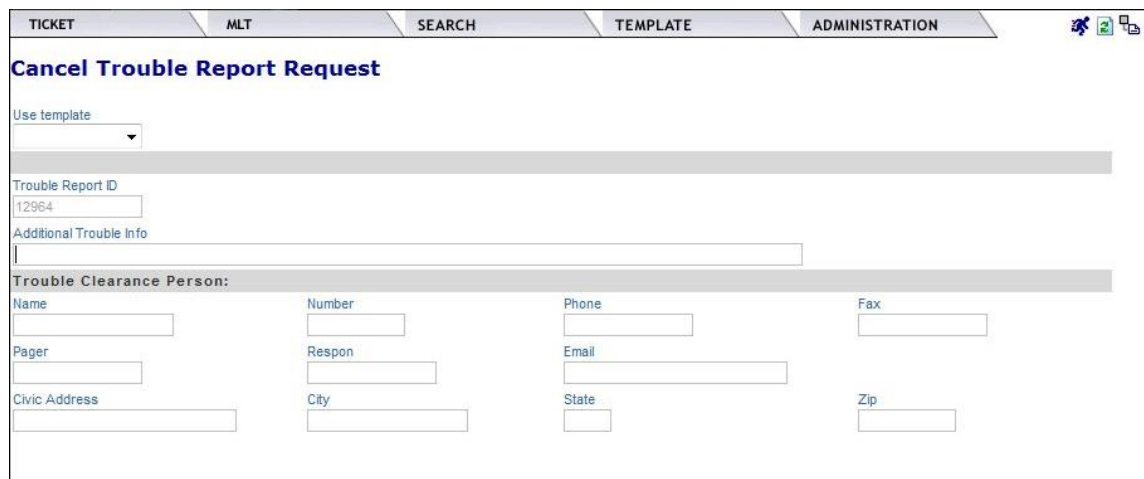


**Figure 86: Cancel trouble report request**

4. Populate the relevant fields.

5. Click **Submit**.

When the Trading Partner receives the Cancel Request, a Cancel Response will be returned, and the status of the Ticket will be changed to show that it has been canceled. The Cancel Request and the Response will be retained under the History tab.

---

NOTE:
If the Trouble Report Status is:
- Craft Dispatched,
- Tech en Route, or
- Tech On Site,

a cancel request will result in an Invalid Data Received Error (0). These Trouble Report Statuses indicate a tech is either loaded to the ticket or working on it. Customer must send an additional note electronically or call in to the center to manually cancel the dispatch.
Wholesale customers dial 877-500-5514.

---

## Late Bonding

If a ticket was called into the Trading Partner and you wish to create a ticket so that you can receive updates and send modifications electronically, you can execute the Late Bonding process.

Use the following procedure to execute the Late Bonding process.

1. Hover over the Ticket tab and execute the Ticket>Create Trouble Ticket menu command. This opens the Create Trouble Ticket initial entry page.

2. Follow the steps under the Create Trouble Ticket section to enter a ticket for the Telephone Number or Circuit that had a Trouble Report called into the Trading Partner Repair Center.

3. When the Create Request is received by the Trading Partner and it is found that there is already a ticket in an open status the Trading Partner returns a "Ticket Already Exists" reject response.

4. When the Trading Partner received the request and already has the ticket, a Response will be returned containing all of the information on the Trading Partner Trouble Ticket. The ticket will be updated with all of the information in the Trading Partner's response, the State and Status will be updated to reflect what was returned on the Retrieve Trouble Info response.

The Ticket is now electronically bonded, will receive status updates and notification from the Trading Partner, and can be modified by the User.

## Escalation Request

Use the following procedure to escalate a Trouble Report Request.

**NOTE: The Report Request must be in Open status in order to be escalated.**

1. From the Work List, click the radio button that corresponds to the Trouble Report Request you wish to escalate.

2. Execute the Ticket > Escalate menu command. This opens the Escalation Request.
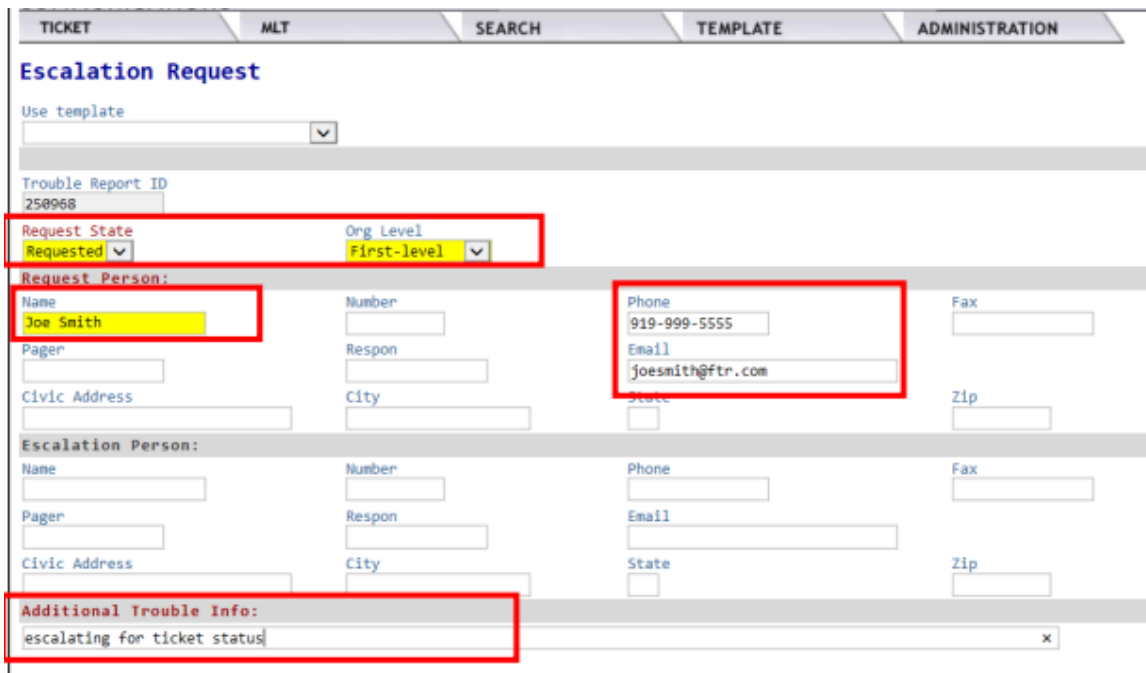


**Figure 87:  Escalation request**

3. Populate the relevant fields. Fields identified above are required.

4. Click **Submit**.

When the Escalation Request has been received by the Trading Partner, a Modify response will be returned. Both the request and response will be retained under the History tab and the Escalation information will be updated under the Escalation tab.

## Retrieve Trouble Info Request

Use the following procedure to get information on a Trouble Report Request.

**NOTE: The Report Request must be in Open status in order to get information.**

1. From the Work List, click the radio button that corresponds to the Trouble Report Request on which you want information.

2. Execute the Ticket > Retrieve Trouble Info menu command. This opens the Retrieve Trouble Info Request page.
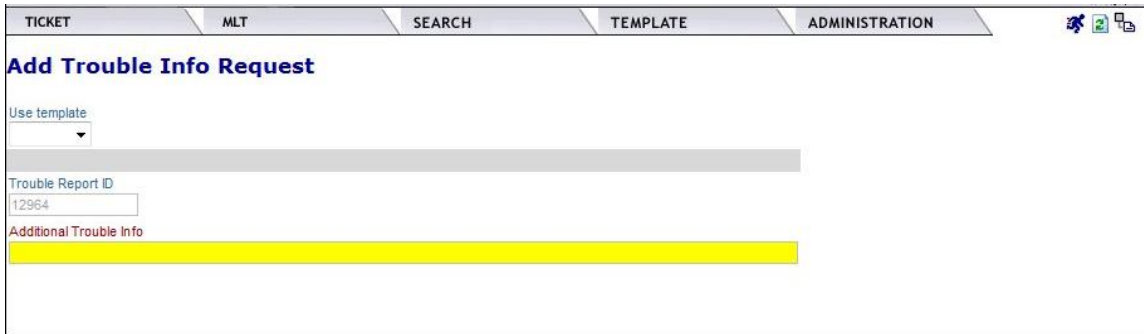
| TICKET | MLT | SEARCH | TEMPLATE | ADMINISTRATION |
|---|---|---|---|---|

**Retrieve Trouble Info Request**

Click on the Submit button to send Retrieve Trouble Info Request for the following Trouble Report. All attributes will be retrieved.

Trouble Report ID
12964

**Figure 88: Retrieve trouble info request**

3. Click **Submit**.
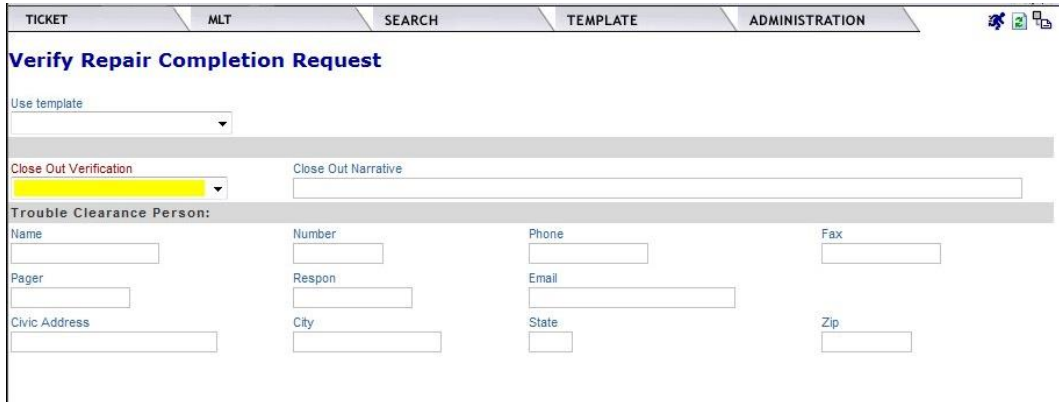
When the Request has been received by the Trading Partner, a Retrieve Trouble Info Response will be returned by the Trading Partner and the information displayed on the Trouble Ticket will be updated to match the data returned if it is different than what was previously displayed.

The Retrieve Trouble Info Request and the Response will be retained under the History tab.

## Verify Repair Completion Request

Use the following procedure to create a Verify Repair Completion Request.

1. From the Work List, click the radio button that corresponds to the Trouble Report Request that requires the Verify Repair Completion Request.

2. Execute the Ticket>Verify Repair Completion menu command. This opens the Verify Repair Completion Request page.



**Figure 89: Verify repair completion request**

3. Populate the relevant fields to either approve the ticket closure (Verified) or deny the closure because there is still an issue.

4. Click **Submit**.

If the ticket closure is approved (Verified), the AVC returned from the Trading Partner will change the ticket status to Closed.

If the ticket closure is denied, the AVC returned from the Trading Partner will change the ticket status to Dispatch, Pending Test, Screening or whatever status is returned on the AVC, and the ticket will remain open.

## Requesting Vendor Meets

### Access Circuits:

Request when Denying Ticket

• Use the Verify Repair function.

• Select Deny.

• Enter "Vendor Meet Requested" in the Close Out Narrative field.

• Call to schedule Vendor Meet – 1-877-500-5514.

### Local Circuits:

If ticket is closed send new ticket

- Create a new ticket.

- Select Trouble Type value "Manualintervention required"

- In the Additional Information field enter "Vendor Meet Request," the previous ticket number and dispatch date.

- Submit the ticket.

NOTE:  To schedule a **Vendor Meet**, in addition to opening an electronic trouble report, Carriers must contact the CCSC at 877-500-5514.

### Attribute Value Change Notifications

The Trading Partner will send an Attribute Value Notification (AVC) to update the ticket information or request an action on the part of the User.

#### Status Notifications

The Trading Partner will send an AVC to update the ticket Status whenever a change is made to the ticket, and on a regular basis corresponding to the time interval entered in the Status Window fields when the Create Trouble Ticket was submitted.

#### Authorization Request Notifications

The Trading Partner may send an AVC to request authorization for Dispatch, After Hours Repair or any of the other valid requests listed under the Authorization tab.

The Flame icon will appear next to the ticket in the Work List when an AVC for authorization is received.

If an Authorization Request is received, the User will send a Modify Request and populate the relevant fields under the Authorization tab to either approve (Provide) the Authorization or Deny it.

#### Request to Close Notifications

If the Trading Partner sends an AVC request to close the Trouble Ticket the status will be changed - "Cleared waiting Customer Verification" is a status that might be received on the AVC and updated in the Status field on the ticket.  In the Work List, that ticket will also have a Flame icon to alert the User that an action is required.

After checking to be sure that the repair issue has been fixed, the User will submit a Verify Repair Completion Request.

## Mechanized Loop Test (MLT)

Before entering a Ticket for a POTS service, you may wish to request that a Mechanized Loop Test be done to ensure that the trouble resides at the Trading Partner.

Use the following procedure to enter the MLT Request.

1. Hover your cursor over the MLT Tab and choose Create MLT Request from the drop-down list. This will open the MLT Request page.
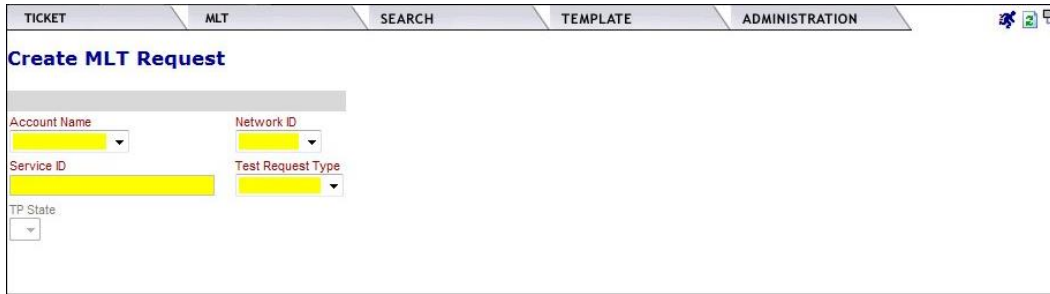
**Figure 90: Create MLT request**

2. Populate the MLT fields with the relevant information, (i.e. Account Name, Network ID Service ID and Test Request Type).

3. Click **Submit**.

4. Click **Refresh** and when the response is received, the Response ID will be displayed on the screen.

The response from the ILEC will provide the test results for that POTS service.

You can view all MLT test responses by using the MLT search selection under the Search Tab. If the MLT test is done and a ticket is subsequently entered, or it is done on a ticket that already exists, the MLT results will be displayed under a "Last MLT" tab which will be displayed after the Assignments tab on the Trouble Report Detail Screen.

Click the Last MLT tab to display the Test Results.

Trading Partners may provide any combination of the following information depending on the type of request:

**POTS Service Test Results (MLT)**

**FULL** - Summary description of the test results

Optionally, DC Signature results: Tip to ground resistance

Tip to ground voltage

Ring to ground resistance

Ring to ground voltage

Tip to ring resistance

Optionally, AC Signature results: Ringers - 0 or 1

Tip to ground resistance

Ring to ground resistance

Tip to ring resistance

Optionally, balance results: Capacitive (percent)

Longitudinal (decibels)

Optionally, loop results, either: Total loop

Open distance from the CO

Optionally, central office results: Line circuit status

Dial tone status

**QUICK**

Optionally, DC Signature results: Tip to ground resistance

Tip to ground voltage

Ring to ground resistance

Ring to ground voltage

Tip to ring resistance

Optionally, AC Signature results: Ringers - 0 or 1

Tip to ground resistance

Ring to ground resistance

Tip to ring resistance

Optionally, balance results: Capacitive (percent)

Longitudinal (decibels)

Optionally, loop results, either: Total loop

Open distance from the CO

**CENTRAL OFFICE** - Summary description of the test results

Optionally, DC Signature results: Tip to ground resistance

Tip to ground voltage

Ring to ground resistance

Ring to ground voltage

Tip to ring resistance

Optionally, AC Signature results: Ringers - 0 or 1

Tip to ground resistance

Ring to ground resistance

Tip to ring resistance

Optionally, central office results: Line circuit status

Dial tone status

**LOOP -** Summary description of the test results

Optionally, DC Signature results:

Tip to ground resistance

Tip to ground voltage

Ring to ground resistance

Ring to ground voltage

Tip to ring resistance

Optionally, AC Signature results: Ringers - 0 or 1

Tip to ground resistance

Ring to ground resistance

Tip to ring resistance

Optionally, balance results: Capacitive (percent)

Longitudinal (decibels)

Optionally, loop results, either: Total loop

Open distance from the CO

# Administration

# Administration Overview

The Administration section allows users with Administration rights to search, create, and modify Users.

To access Security function, execute the Administration > Security menu command. This opens the Security Home window.



**Figure 91: Security home page**

In this section we review the following:

- Creating User Profiles
- Searching for Users
- Modifying Users
- Creating Display Groups

## Creating Users

After navigating to the Administration tab and selecting Security tab, use the following procedure to create a user.

1. Click the User Profile link. This opens the User Profile Search List window.

**Figure 92: User profile search list**

2. Click **New**. This opens the User Profile Details page.



**Figure 93: User profile details**

**WARNING: User Name, Password, User Type, and Primary User Group are required fields.**

3. Enter a unique User Name and Password.  Passwords are case sensitive and can be any combination of characters up to a maximum of 16 characters.

4. Reenter the password into the Confirm Password field.

5. Optionally, enter a Full Name and Designation for the user.

6. Select a User Type from the dropdown menu. (The ESP Name is pre-populated based on your user profile.  You may even be able to associate multiple ESPs to the user, depending on your user profile.)

**NOTE: The value(s) available in the User Type drop-down menu is determined by your User Profile configuration. You cannot assign a User Type other than the one you have been assigned.**

7. Optionally, enter a Phone number and Auto-Pop Email Address.  The Email Address will be populated by the user when they log in the first time.

8. ESP Name, the available values will show in the Available box.  Move the ESP Name to either the Read Write or Read Only Permission box depending on the access for that user.

**NOTE: When more than one is available, you can move the values to selected box for either Read Write or Read Only Permission.**

9. Select the Group to which the new user will belong, and place it in the Available list.

10. Click the right-pointing arrow that corresponds to the Primary Group field.

11. Optionally, select another Group and then click the right-pointing arrow that corresponds to the Secondary Group field to add the privileges associated with that group. This gives the user the privileges of both groups.

12. Click Save. This returns you to the User Profile Search window.

## Search for Users

Use the following procedure to search for users.

1. Execute the Administration > Security menu command. Click on the User Profile link.

2. Input the User Name of the user you are looking for. Alternately, you can input the Group Name said user belongs to.

| | | | | | |
|---|---|---|---|---|---|
| **User Profile Search List** | | | | | |
| | | | | New  ✕ Delete  ⌂ Back to Home | |
| **Select** | **User Name** | **Group Name** | **User Type** | **Full Name** | |
| | | | | | ▶ Go |
| ○ | 001 | VFO_END_USER | ESP | Customer 1 | |
| ○ | 002 | VFO_END_USER | ESP | Customer 2 | |
| ○ | 003 | VFO_END_USER | ESP | Customer 3 | |
| ○ | 123 | VFO_END_USER | ESP | 123 | |
| ○ | 1234 | VFO_END_USER | ESP | 1234 1234 | |
| ○ | abitra | VFO_END_USER | ESP | | |
| ○ | ag | ASRLSRE911 | ESP | | |
| ○ | ahall | VFO_END_USER | ESP | ahall | |
| ○ | albert | VFO_END_USER | ESP | Albert | |
| ○ | carl | VFO_END_USER | ESP | Carl | |

Displaying results 1-10 of 60 results
Result Pages : 1 2 3 4 5 6 ▶

**Figure 94: User profile search list**

**NOTE: Remember you can use the % wildcard. (E.g. a% would return all the users with 'a' at the beginning of their user name.)**

## Modify Users

Use the following procedure to make changes to a user's attributes.

1. On the User Profile Search List window, click the link of the User Name you want to modify. This opens the User Profile Details window for the selected user.
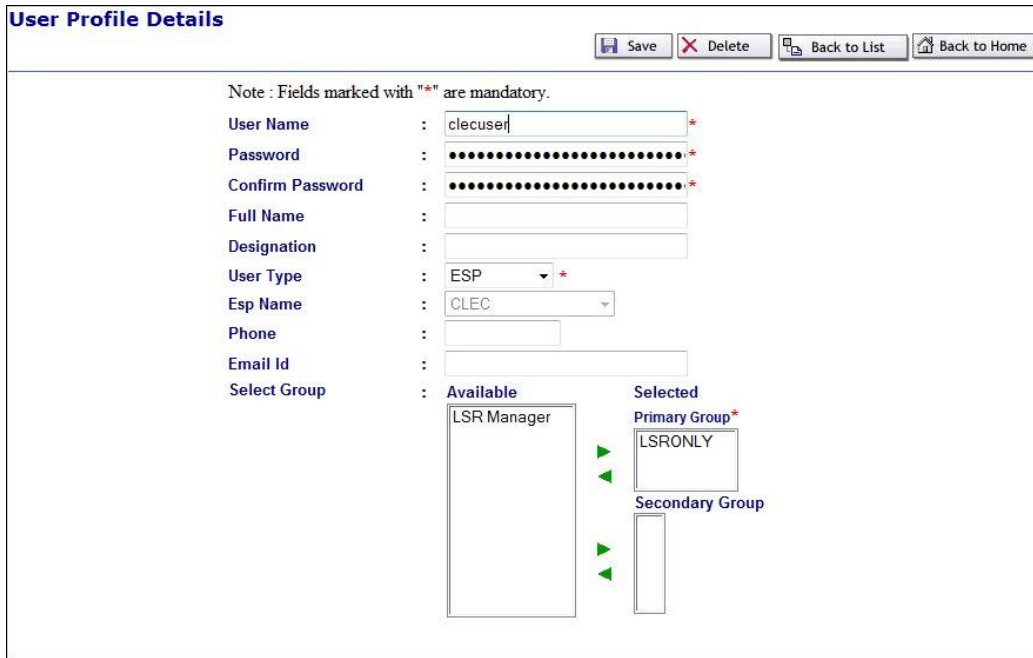
2. Make the desired changes.

**Figure 95: Modify user profile details**

3. Click **Save**. A Status message appears stating that the profile was successfully updated.

## Create Display Groups

Displays Groups are a set of users grouped for the purpose of filtering the Order List (Work List in the case of TA). This function is available in the Local, Access and TA Modules.

To create a Display Group:

1. Hover the Administration tab.

2. Click the Security menu option.
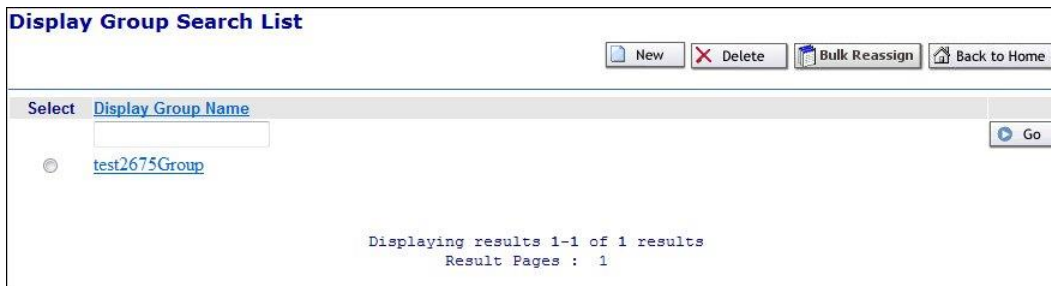
3. Select Display Groups.

4. Click New.



**Figure 96: Display group search list**

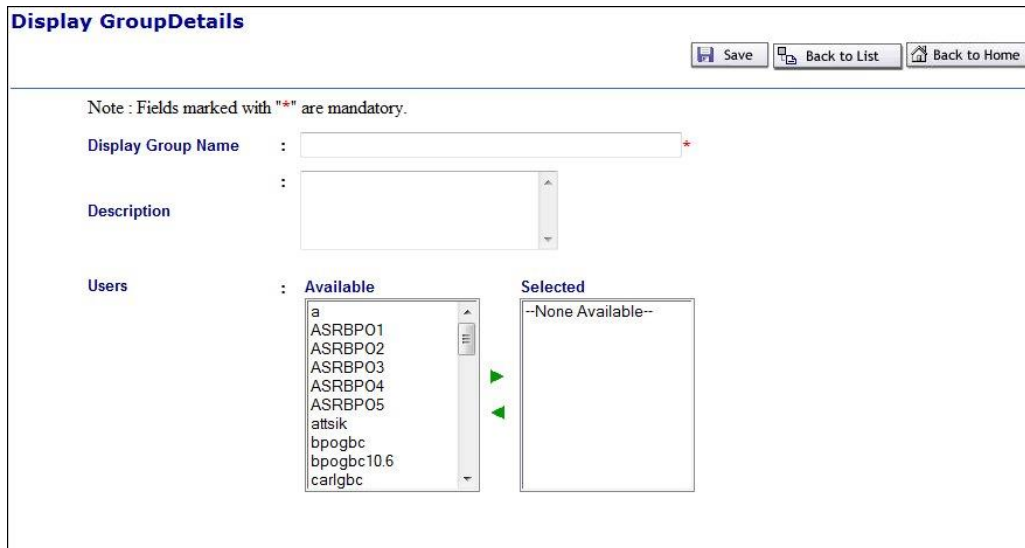5. Enter a Display Group Name, Description, and select users.



**Figure 97: Display Group Details Screen**

6. Click **Save**.

## Search and Modify Display Groups

After you have several Display Groups created, you may need to access one to add or remove users from the group.

You can search by the Display Group name or use % as a wild card character.

1. Hover over the Administration tab.

2. Click the Security menu option.

3. Click Display Group.

4. Enter Display Group name or part of the name and use % as the wild card character.
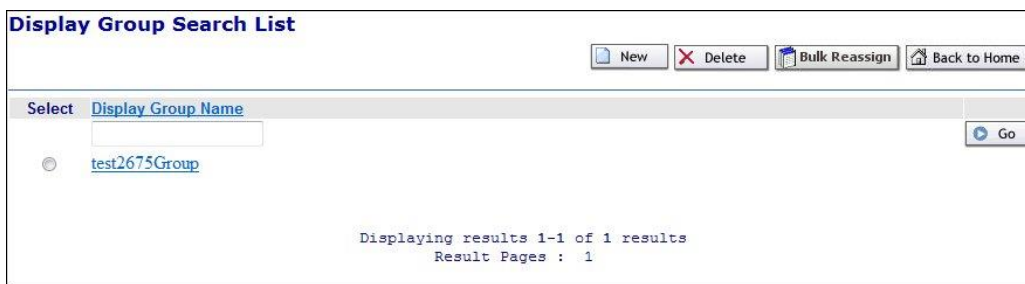
5. Click the **Go** button.



**Figure 98: Display group search list**

6. Click the Display Group Name to open the group to modify the users associated.

## Bulk Reassign Display Groups

To move the users around from one group to another you can use Bulk Reassignment.

1. Hover the Administration tab.

2. Click the Security menu option.

3. Click **Display Groups**.
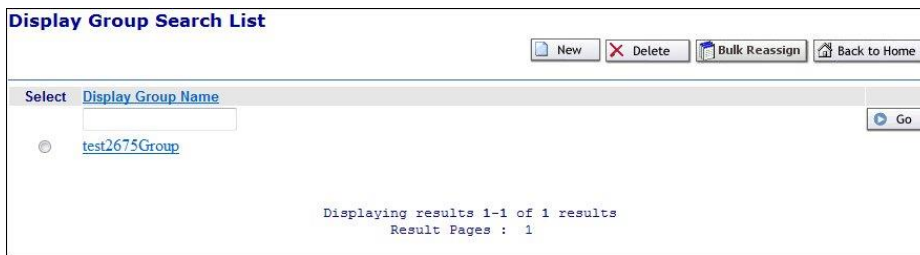
4. Click **Bulk Reassignment**.



**Figure 99: Display group search list**

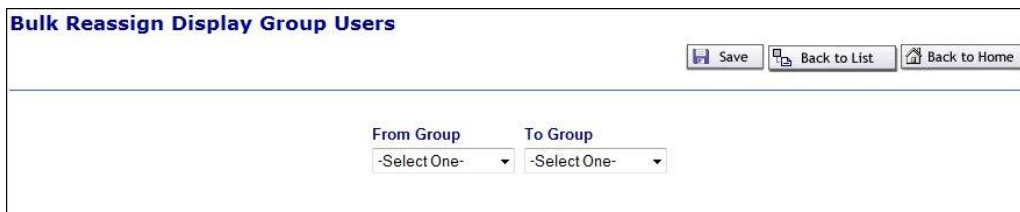5. Select a group from the "From Group" and To Group options.



**Figure 100: Bulk reassign display group users**

6. Click Save.

# Change Log

| Date | Page | Revision |
|------|------|----------|
| 01/03/2022 | All | Revised User Guide |
| 06/15/2022 | 13 | Revised supported browsers |
| 06/30/2022 | 38 | Remove invalid screenshots for step 2 |
| 07/27/2022 | 42, 43, 44 | Add Access Order Service Types Table |
| 08/03/2022 | 42, 43, 44 | Update Access Order Service Types Table |
| | | |

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