Delivery Worklist Job Aid

Things to Know

Purpose:
View the status of all pending orders across a company in one worklist for both portal and API orders submitted in the Verizon Partner Solutions Exchange (VPS) portal and orders submitted via Legacy systems. In addition, a worklist of completed and canceled orders can be downloaded.

Things to know:

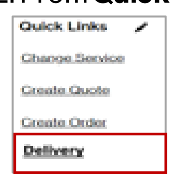
1. All users with the **Order** role will have access to the **Delivery** Worklist
2. Each user must have their own user id
3. The Delivery Worklist will display Verizon Partner Solutions Exchange, Non Exchange (Legacy) and API pending orders
4. Canceled and completed orders will be available for download
5. The Delivery Worklist data is refreshed every 2 hours
6. View completed and/or cancelled order activity <30 days on the delivery worklist
7. Search any completed or cancelled orders even if they are >30 days and do not appear on a worklist

Getting Started

There are 2 ways to access the Delivery Worklist

Option 1: From **Worklist**

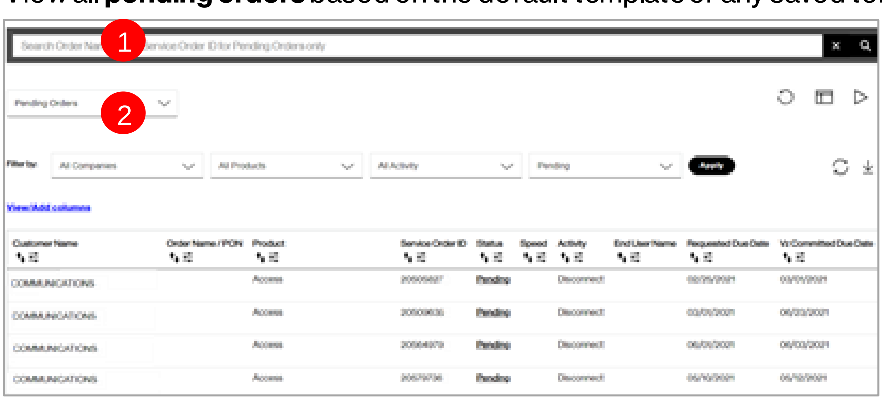
Option 2: From **Quick Links**



Delivery Worklist

Delivery Worklist search and sort functions

1. Search pending orders by **Order Name/PON or Service Order ID**
2. View all **pending orders** based on the default template or any saved templates



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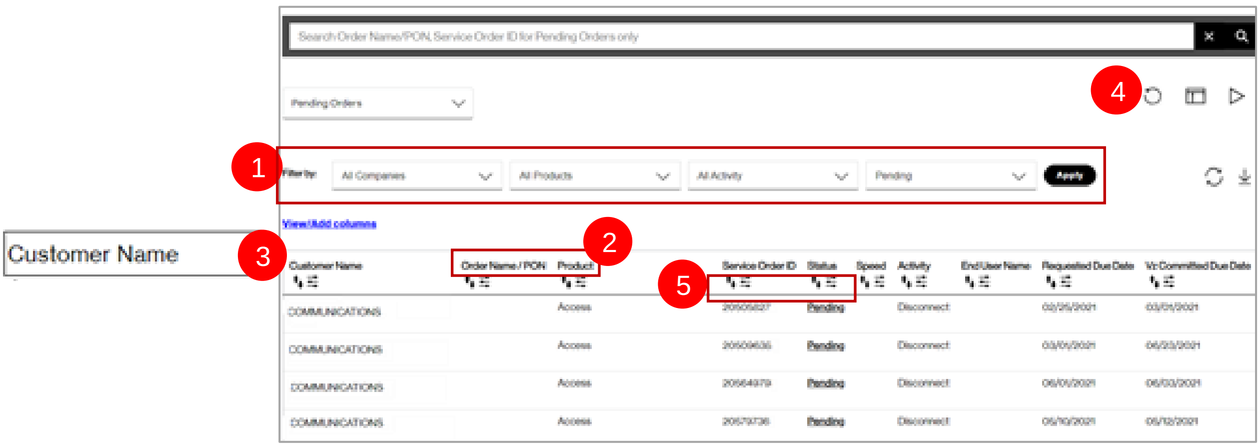
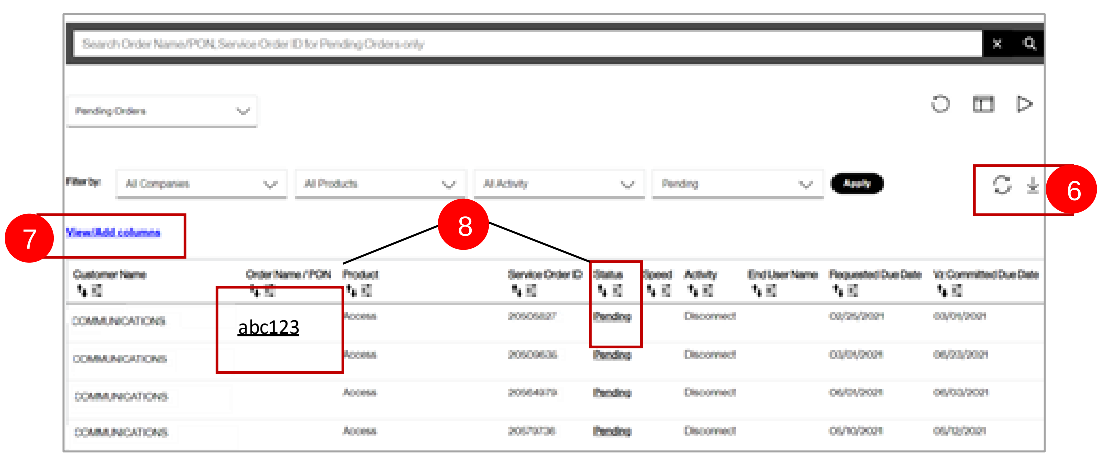
Delivery Worklist (continued)

Delivery Worklist search and sort functions

1. Filter by Company, Product, Activity and Status
2. To **configure the worklist**, click on the header name to rearrange the columns
3. Double-click the header to **rename the column** (if desired)
4. Click **reset** to return to the defaulted view
5. Sort worklist columns by using the **sort function and/or filter option**



6. Click **Refresh** to reload the data displayed on the screen or **Download** to copy order details to an Excel file
7. Use **View/Add Columns** to determine which data elements are needed to configure your worklist
8. Click the **Order Name/PON** hyperlink to view the order summary & the **Status** hyperlink to view the pending milestone summary



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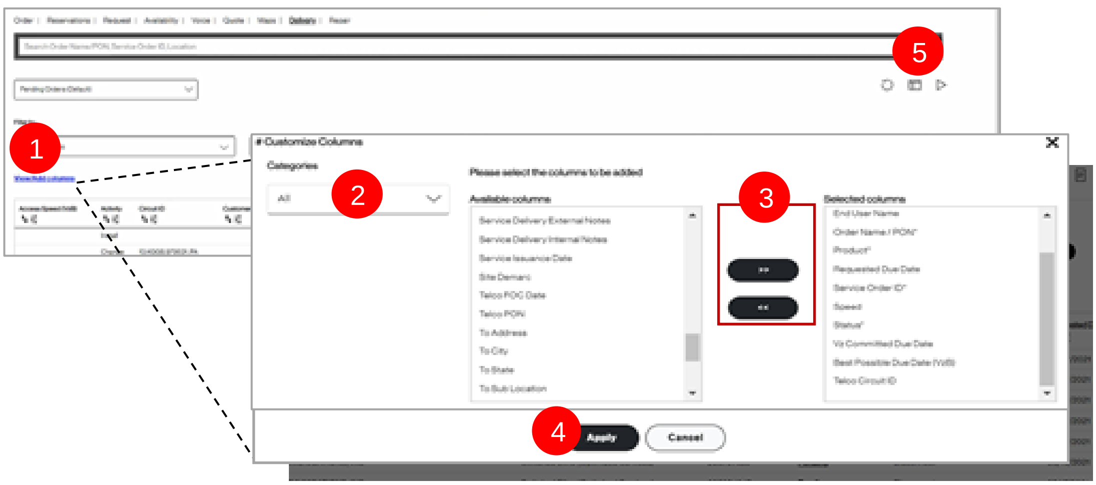
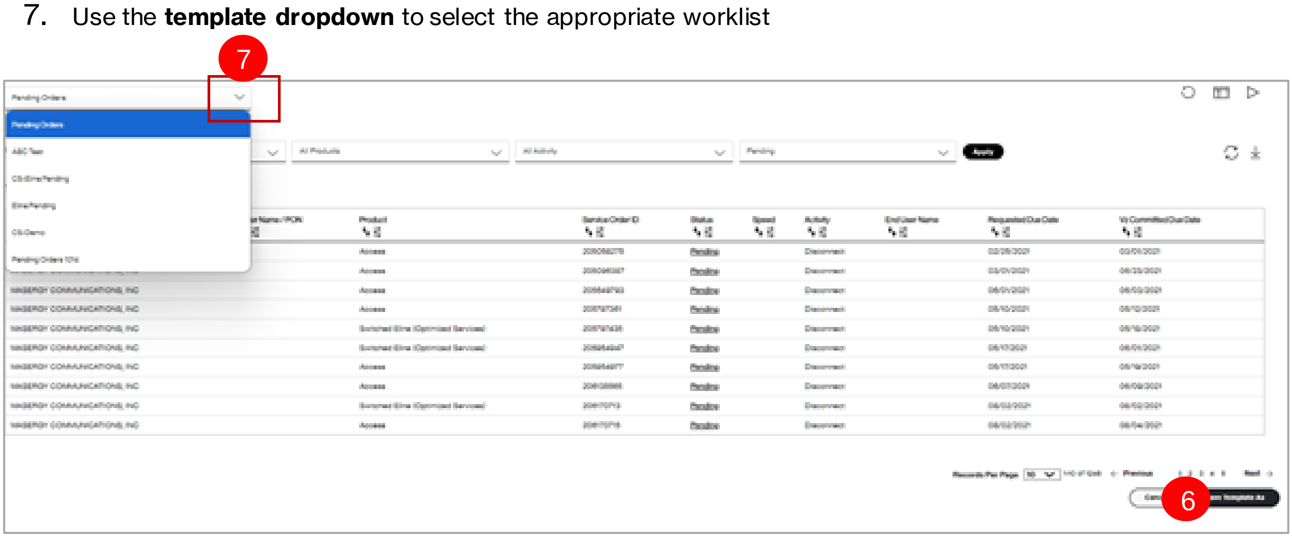
View/Add Columns

Use **View/Add Columns** to determine which data elements are needed to configure your worklist

1. Select **View/Add Columns**
2. Use the **Categories** dropdown to narrow down the options you want to add or remove
3. From the **available column** menu, click to select the data criteria, then click the appropriate arrows to move/remove the selected criteria to/from the selected column (Options with * can not be removed)
4. Click **Apply**
5. Click to view Templates/Generated Worklist



6. Return to the worklist, scroll down, and click **"Save Template As"** to be used in the future
7. Use the **template dropdown** to select the appropriate worklist



Note: Users can only view templates of other team members, in order to change a template, you must save the template as your own (with a new name)

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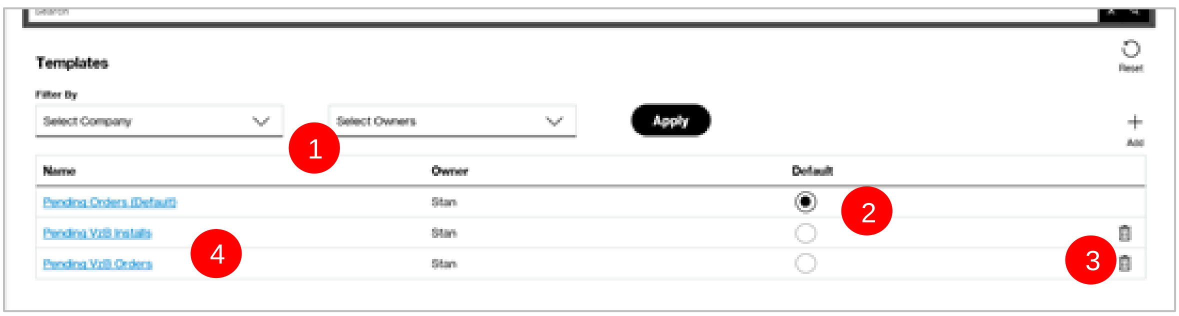
Template Icon Options

Use the Template icon to:

1. Filter by **company or by owners**
2. Use your **template** as the default
3. Discard **templates you created** (you cannot delete others templates)
4. View **other owner templates** (filter another owner's template, and have the option to save the template and rename it)

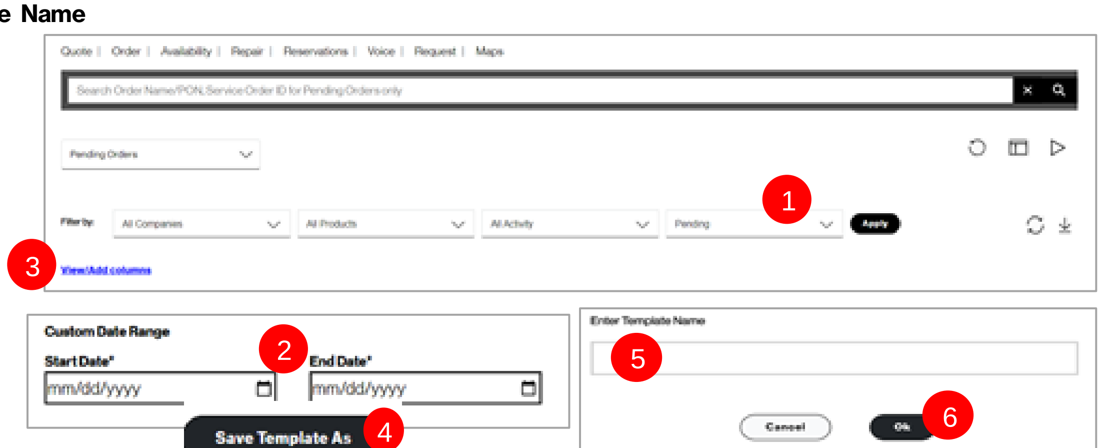
Note: When a user views another's template, and modifies the view, the modification must be saved using " Save Template As" in order to keep the changes. The original owner remains unchanged.



Save Template As

From the **Delivery Worklist**:

1. Click the **Pending filter** dropdown and choose the appropriate option. If either Cancelled or Completed are included in the query, the date range is required
2. Select the **Start and End Date** (if applicable- Cancelled or Completed)
3. Click **View/Add columns** to include additional order criteria (as needed)
4. Scroll down and click **"Save Template As"**
5. Enter the **Template Name**
6. Click **Okay**



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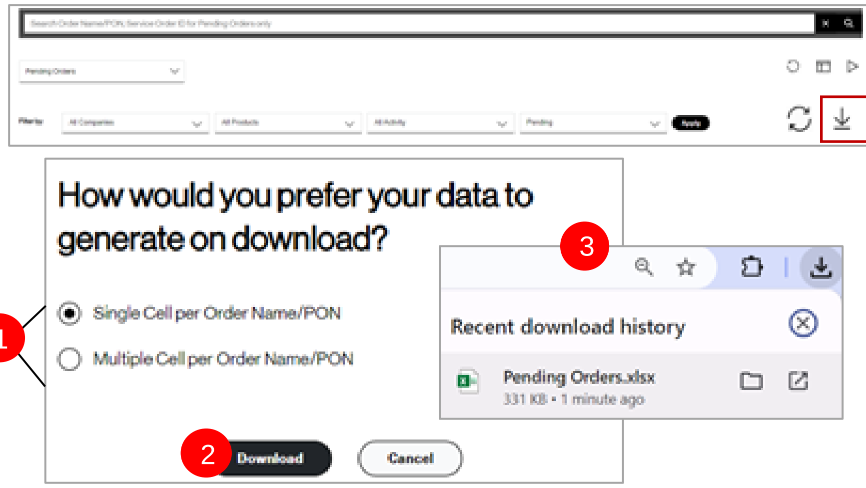
Download Options

Use the Download ⤓ icon to:

1. Select **Single Cell** Order Name/PON or **Multiple Cell** Order Name/PON
2. Click Download
3. Retrieve the download file

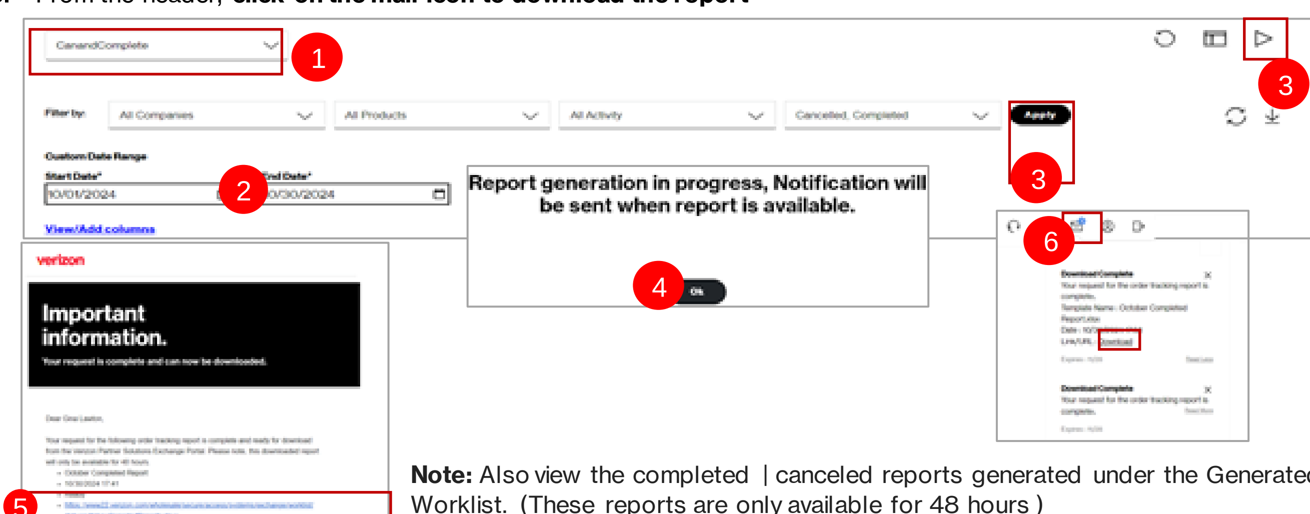
Single cell output – Combining output of multiple orders into a single row per PON.
Multiple Row – Output of each order into multiple rows per PON. (Worklist view)



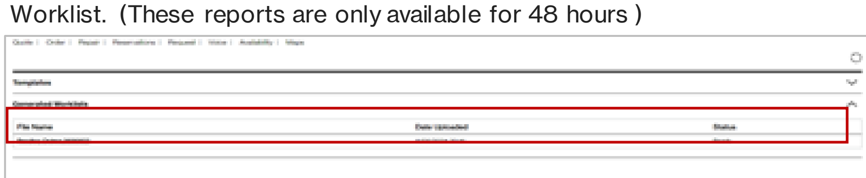
Cancel and Complete Reports

From the **Delivery worklist** screen:

1. Click the **appropriate template**
2. Select the **Start and End Date** (change as needed)
3. Click **Run** ▷ **or Apply** Apply
4. Click **Okay**
5. An email will be generated. **Click on the email link to access the report** or
6. From the header, **click on the mail icon to download the report**



Note: Also view the completed | canceled reports generated under the Generated Worklist. (These reports are only available for 48 hours)



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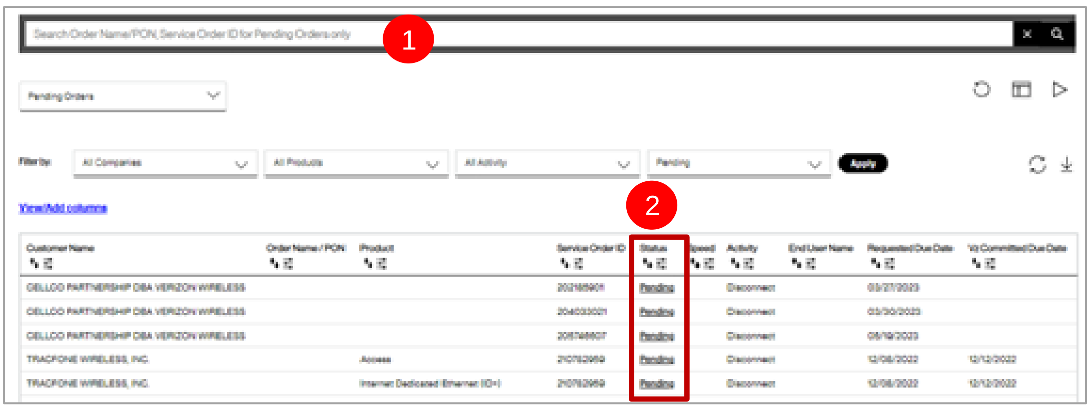
View Milestones

From the **Delivery Worklist** page there are 2 ways to view Milestone details :

1. On the search bar, **enter the Order Name/PON or Service Order ID,** click the hyperlink in the Status column
2. Click the **Hyperlink** in the **"Status"** column on any order in the worklist



From the **Milestone Summary** page:

3. View **major and minor milestones** (view additional details about milestone **here**)
4. Review **Service Delivery comments** (when applicable)