



# **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







# **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 O to return to the defaulted view
- 5. Sort worklist columns by using the sort 🖡 function and/or filter option

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	COMMUNICATIONS		Access	20579736	Pending	Disconnect		05/10/2021	05/12/2021	

- 6. Click **Refresh**  $\bigcirc$  to reload the data displayed on the screen or **Download**  $\downarrow$  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 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

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**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.

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### 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	Quote   Order   Availability   Repair   Reservations   Voice   Request   Maps
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# **Download Options**



# **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 🌆
- 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

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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

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From the Milestone Summary page:

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

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