USER GUIDE

OSP Manager

Contents

INTRODUCTION

OSP Manager is a comprehensive solution, based on TM Forum specifications, designed to support customer onboarding and coordination of field service around OSP Assets and Resources. Includes Mapping tools and Composite Place Management to precisely locate Assets, Bookable Resources, Warehouses, Plant Elements, Devices, Demarcation Points, and Premises.

OSP Manager is part of SMP (Service Management Platform) solutions set based on Microsoft Dynamics 365 for Field Service. PLEASE NOTE: it is important to have Microsoft Dynamics 365 for Field Service v. installed in your system before using this product.

GLOSSARY

Serviceability Check – Enhanced lead qualification process. Service check helps to gather initial information, utilize HERE Autocomplete API to find Geographic Address and cross-reference with visual map to ensure Service coverage.

Service Order – Enhanced Opportunity-to-Order process. Step-by-step flow, helping prepare Work Orders, Products and monitor Fulfillment.

Map Layers – Mapping tool allows to visualize different primitives (points, polylines and polygons) on the map and combine them into independent layers.

Place – TM Forum Place model. Composite entity consisting of Geographic Place and Local Place. By default, represents Service Location, where the actual provisioning will be delivered to.

Geographic Place – Can be associated with either Geographic Address or Geographic Location. Based on what is present, it automatically picks either one. Also used as root entity to store Local Places associated with this Geographic Place

Geographic Address – Postal Address.

Geographic Location – TM Forum part of the model, can be a simple point or complex geospatial object (area, polyline, etc.). It is defined by either a set of Geographic Points associated with it or by compressed coordinates stored in Encoded Points attribute.

Local Place – Detailed information about the Geographic Place. Default types are Premise, Demarc, CPE, Head End, Drop, Other.

Local Address – Additional navigation within Local Place.

Local Location – Sub-level detail, helping to find exact location within specified Local Address.
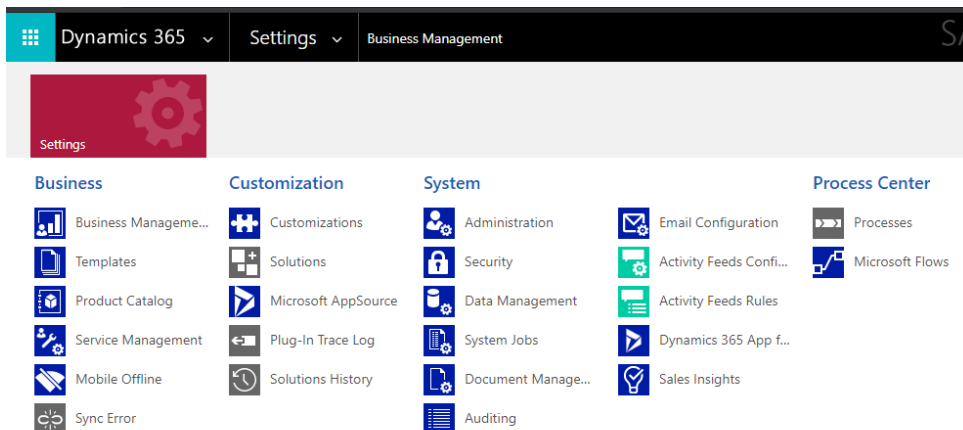
INSTALLATION

For successful operation of the solution it requires Microsoft Dynamics 365 for Field Service installed in the target system, as well as **ETI_SMP_Full_Core solution**, which is a base for the OSP Manager.
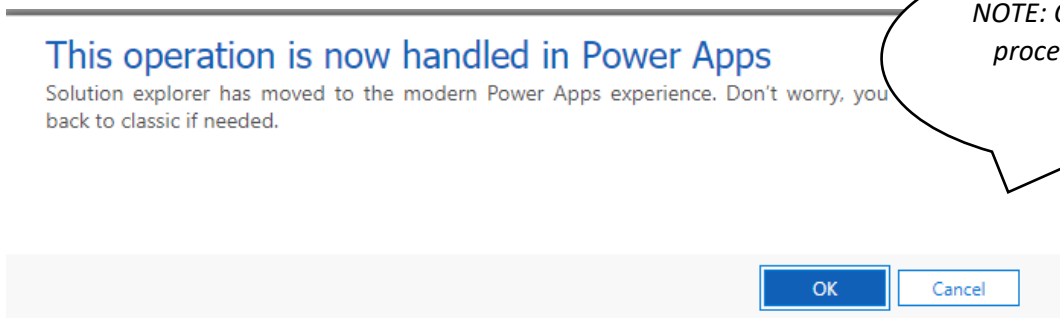
To install navigate to target instance, then click on Gear icon in the top right corner and select Advanced Settings:
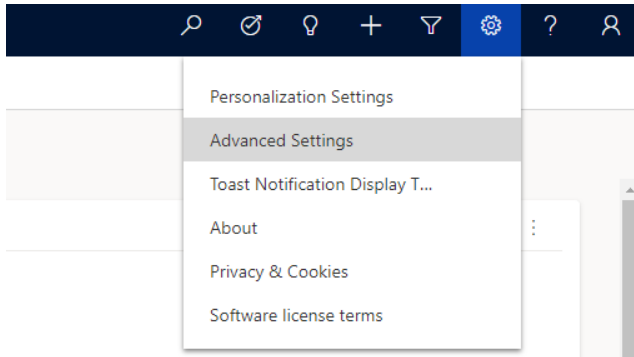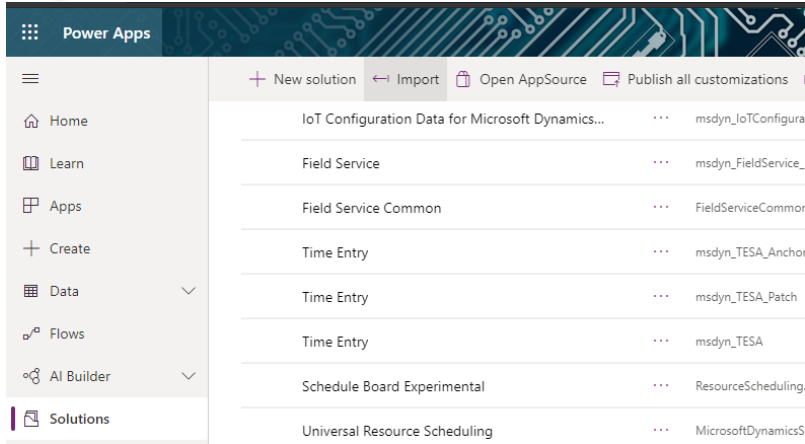

In the new tab, click on drop-down icon for Settings and navigate to Solutions:


A prompt to navigate to Power Apps Solution explorer will pop-up.

This operation is now handled in Power Apps
Solution explorer has moved to the modern Power Apps experience. Don't worry, you [can get] back to classic if needed.

NOTE: Click Cancel to proceed in Classic mode

OK   Cancel

Click OK to redirect to PowerApps. In the new tab, select Import to start installation process:

Select **ETI_SMP_FULL_Core** (latest version) to be installed first.
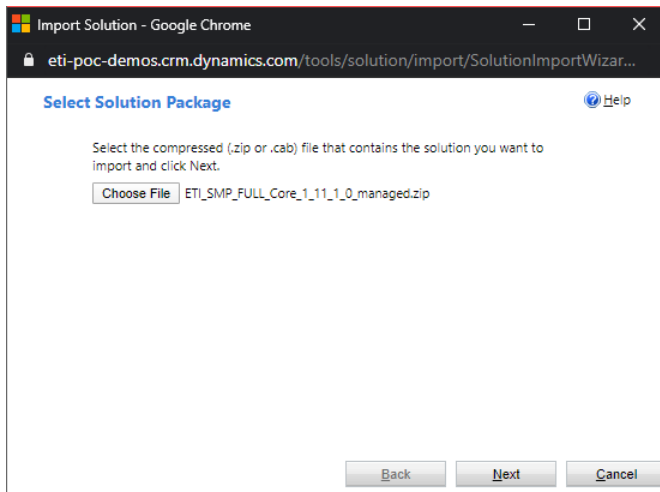
Click Next.
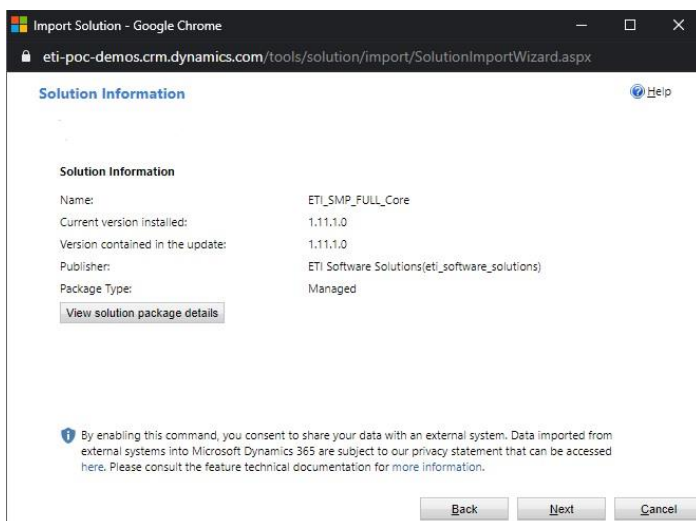
Click Next. The Solution will start to install.
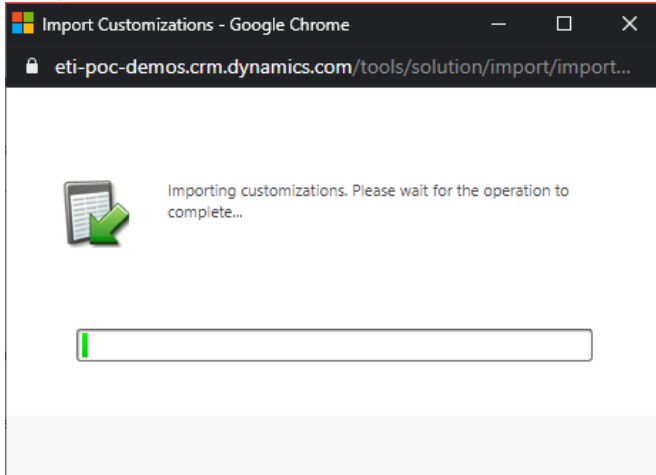
After successful installation proceed with exact same process for OSP Manager Solution.
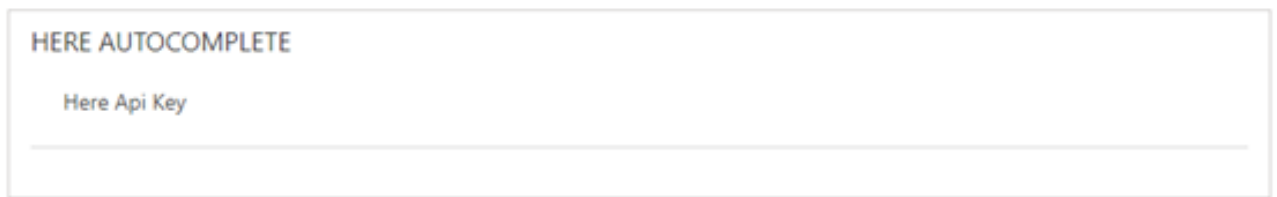
CONFIGURATION

Activate HERE Api key

To activate HERE API key, navigate to Settings in the bottom left corner of the screen and select Settings
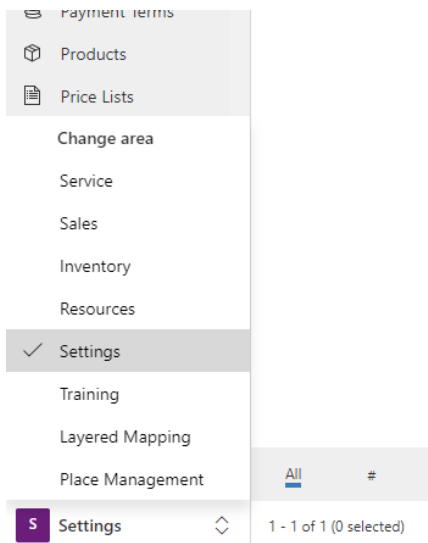
Click on "Field Service" settings and in the new window go to OSP Manager Tab:

Insert HERE Api Key to engage address autocomplete functionality.

Configure Work Order types and Incidents

To make sure your Service Order process works as designed, please create Incident Types and Work Order.

To create Incident Types, navigate to Settings Tab and Click on Incident Types:
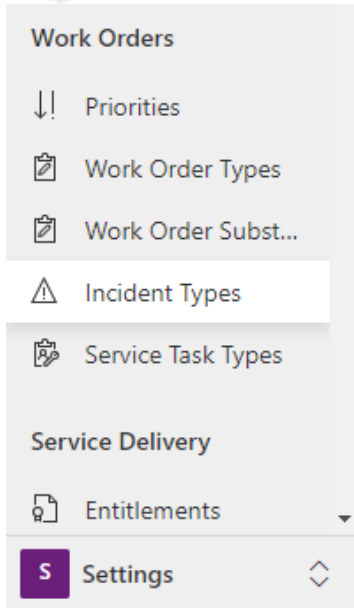
Click "+ New" in the top Ribbon:

Fill in required information:

Save changes by clicking on Save button.

> PLEASE NOTE:
> Default Incident Types have no Details, Products and Service Tasks.

To assign created / default Incident Types navigate to Setting tab and select Field Service Settings. Open active record and navigate to OSP Manager tab.

Fill in provided fields to ensure expected behavior of Service Order process.

> PLEASE NOTE:
> Labels and Custom processes are subject of customization. For more info please contact us.

Configure and Set-up Places

Place is a composite entity representing combination of Geographic Place and Local Place. Geographic Place is a Physical point on the map where Premise/Asset/Device may be and Local Place is a combination of details about how to find exactly what you are looking for. To set up Place it is recommended to start with Geographic Address.
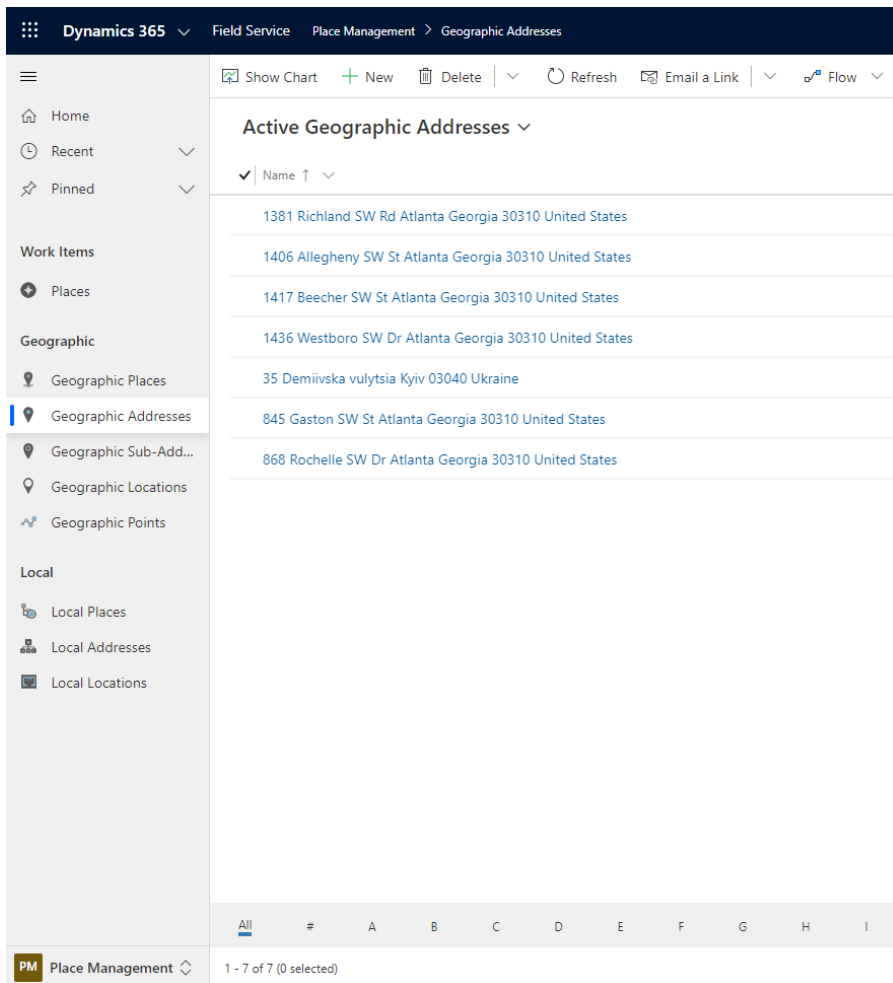
> PLEASE NOTE:
> Most likely the creation of Place will be initiated via Service Order or via bulk import.

Create Geographic Address

Navigate to Place Management tab:
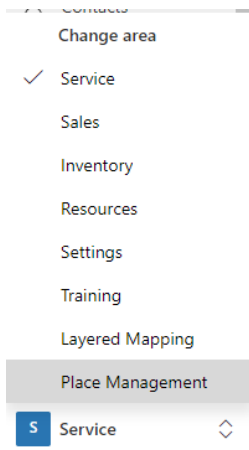
Click on Geographic Address in the menu on the left:

Click "+ New" to create new Geographic Address:

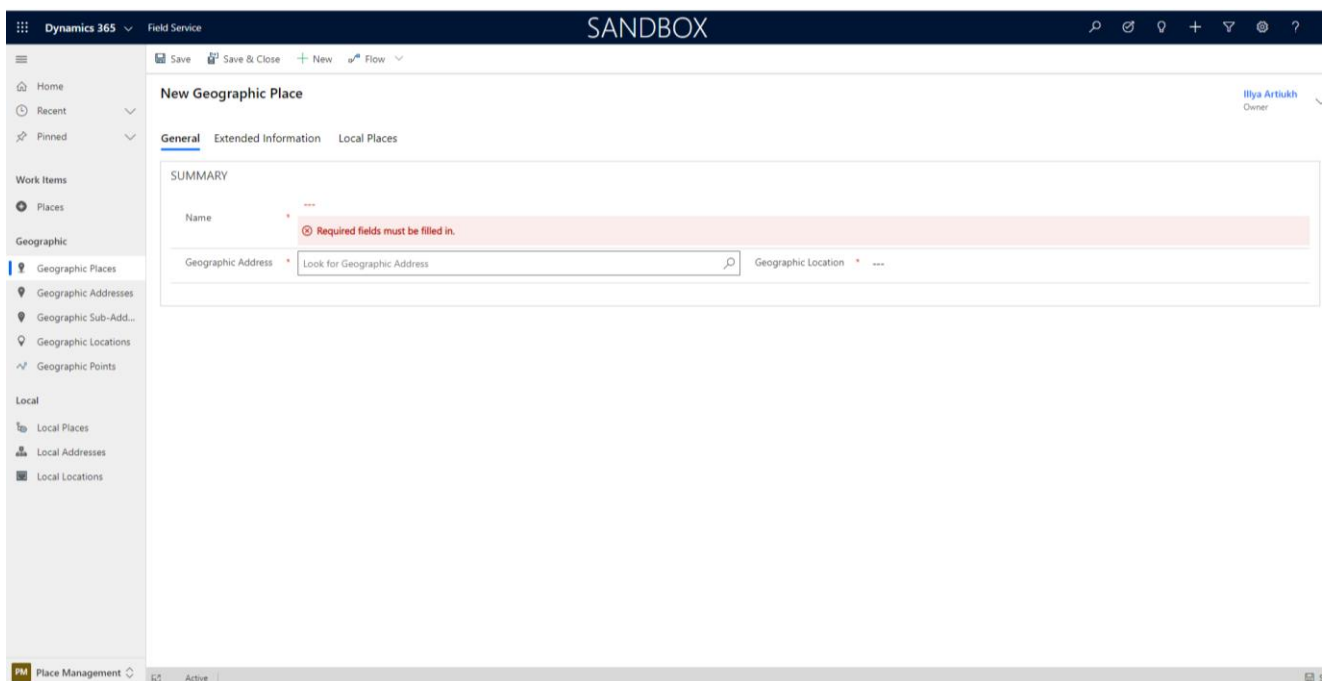Type in Address in Search bar (Address Details)

Save and Close record by clicking "Save & Close" in the top ribbon.
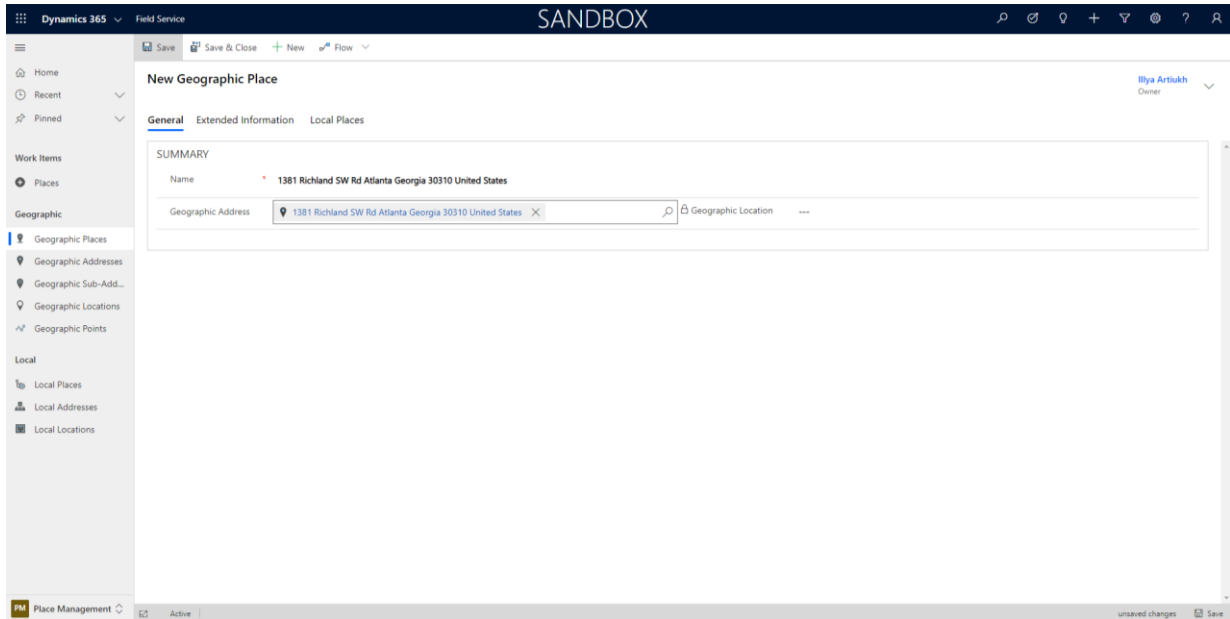
Create Geographic Place

Click on Geographic Places in the menu on the left:
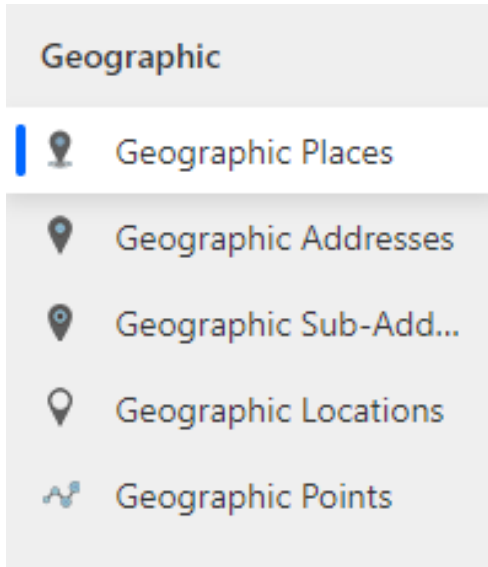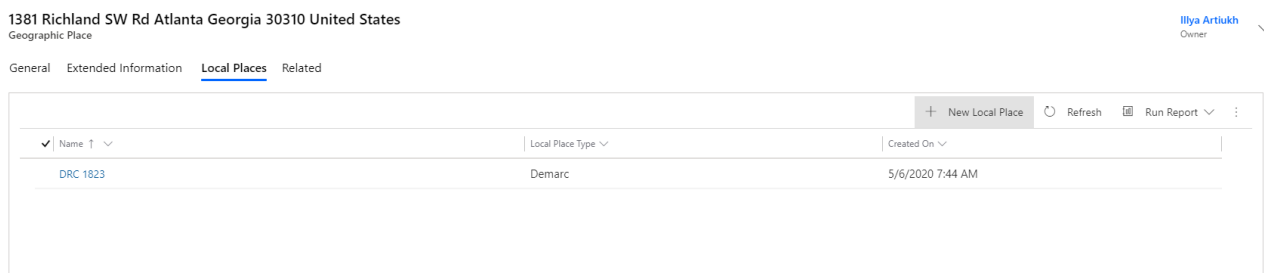

Click "+ New" to create new Geographic Place:

To create new Geographic Place simply select Geographic Address by clicking on Search icon and selecting desired Geographic Address. The name of the Geographic Place will be automatically set to Geographic Address. In case there is no Geographic Address, Geographic Place will use Geographic Location instead. Click Save in the top Ribbon to save the changes.

Link Local Place to Geographic Place

To create Local Place and associate it with Geographic Place, go to Local Places tab in Geographic Place record and click "+ New Local Place" in the top ribbon of the Grid.

Fill in required information in the Quick Create Section and click "Save and Close":

Quick Create: Local Place ✕

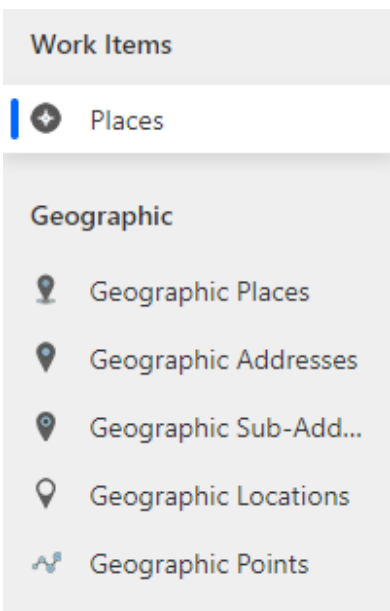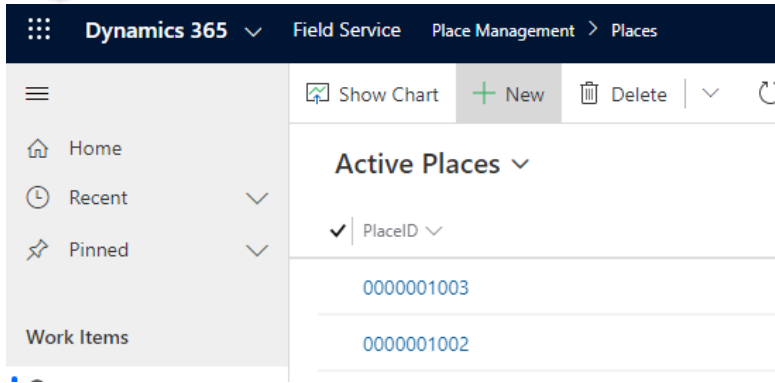|		
Local Place Type	*	Premise
Name	*	Detached House
Demarc	*	🔖 DRC 1823 ✕ 🔍
Geographic Place	*	📍 1381 Richland SW Rd Atlanta Georgi...

Save and Close ⌄   Cancel

PLEASE NOTE: To be able to create Local Place of type Premise, you must have Local Place of type Demarc created.

Create Place

To create Place, click on Places in the menu on the left and click "+ New" in the top ribbon.

Work Items

◉ Places

Geographic

📍 Geographic Places

📍 Geographic Addresses

📍 Geographic Sub-Add...

📍 Geographic Locations

〰️ Geographic Points

To create Place, simply select Geographic Place in the Summary Tab:

All information that exists and related to that Geographic Place will be automatically filled. Slick "Save" to save changes. Your Place is now created with unique ID. You can Override Name by toggling "Override Name" field to "Yes" and typing your own name.

Configure Service Areas

Service Area consists of several configurations that have to be made before using it: Geographic Location, Technology, Network Zone and Service Areas. Each of those configurations are mandatory to ensure successful operations within OSP manager.

Create Geographic Location

Navigate to Place Management tab in the bottom left corner and select Geographic Locations. Then Click "+ New" to add new Geographic Location.
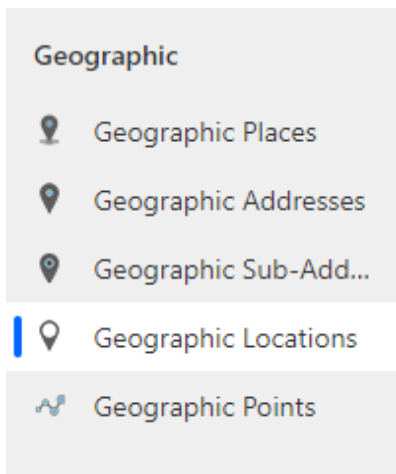
Fill in the Name and Geometry Type. Geometry types consist of Polygon, Point, Line, Graph and Ring. To display an Area – please select Polygon. You can build Geographic location using Geographic Points in the grid, or fill in Encoded Points field. Encoded Points represent set of Geographic Points by Bing! Maps.

PLEASE NOTE: ETI Software recommends using Bing! Dev Center to create EncodedPoints. To know how to get Encoded Points from Bing! Dev Center, please contact us.

To create Geographic Location using Geographic Point, click on "+New Geographic Point" and input coordinates to create Geographic Point:
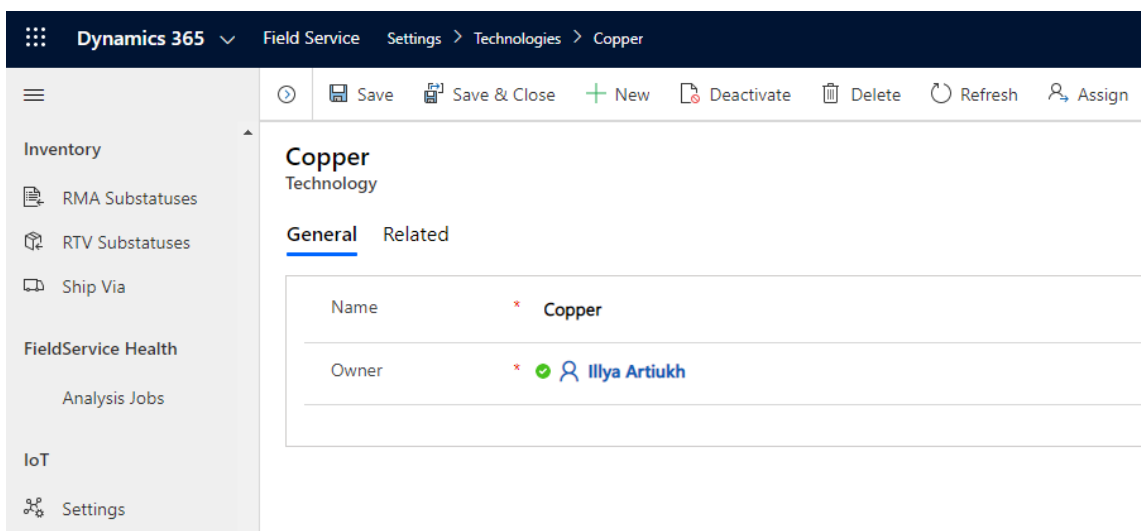

PLEASE NOTE:
If you are already using Encoded Points, they will be recalculated automatically to fit new Geographic Point. This will result in change of the shape of the Area.

Save & Close, to save the changes.

Next step is to set up Technologies and Network Zones. Network Zone is an identifier for the area to be provisioned by specific NoC (Network Operating Center). Technologies represent the type of technology services will be provided by to the end Subscriber. To create Technologies, navigate to Settings in the bottom left corner and click on Technologies:
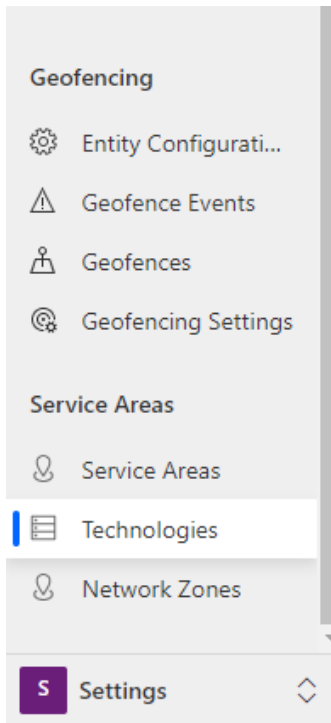
Click "+ New" in the top ribbon to create new Technology. Fill the name and click "Save and Close" to save changes and create the record.

To create Network Zones, navigate to Network Zones in the left menu, then click "+ New" to create new one.
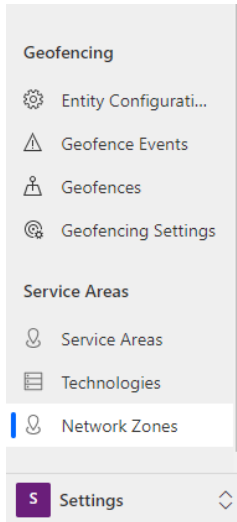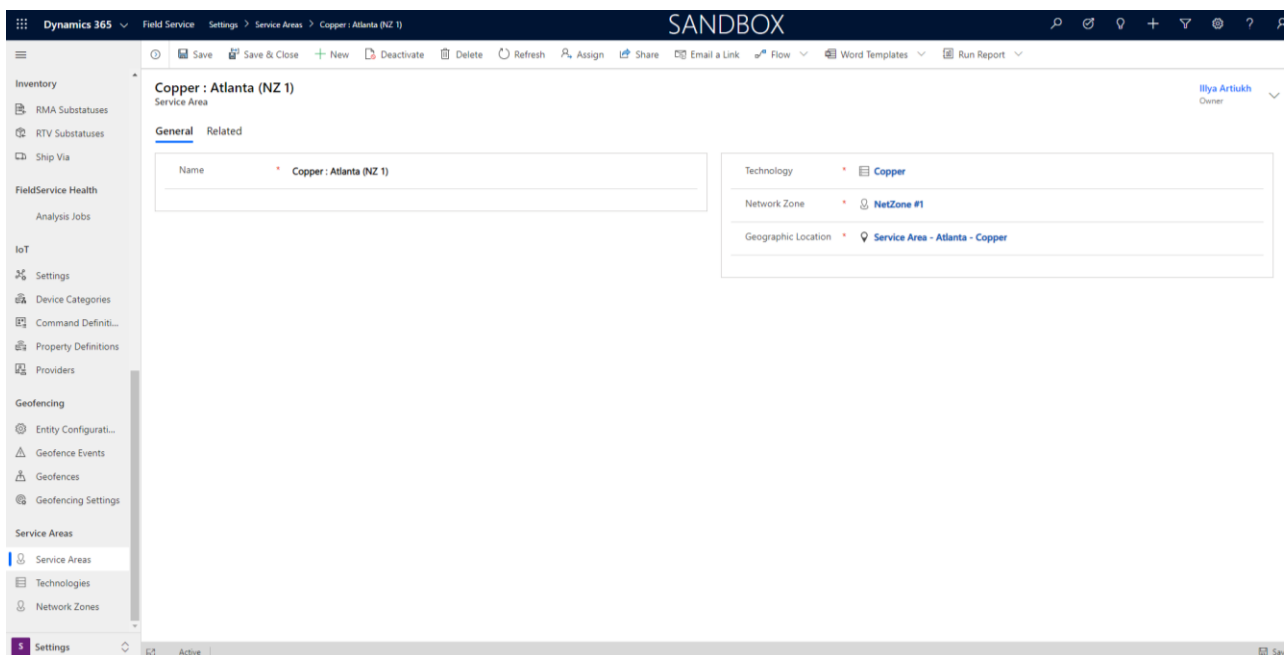
Fill in the name and click "Save and Close" to create record.
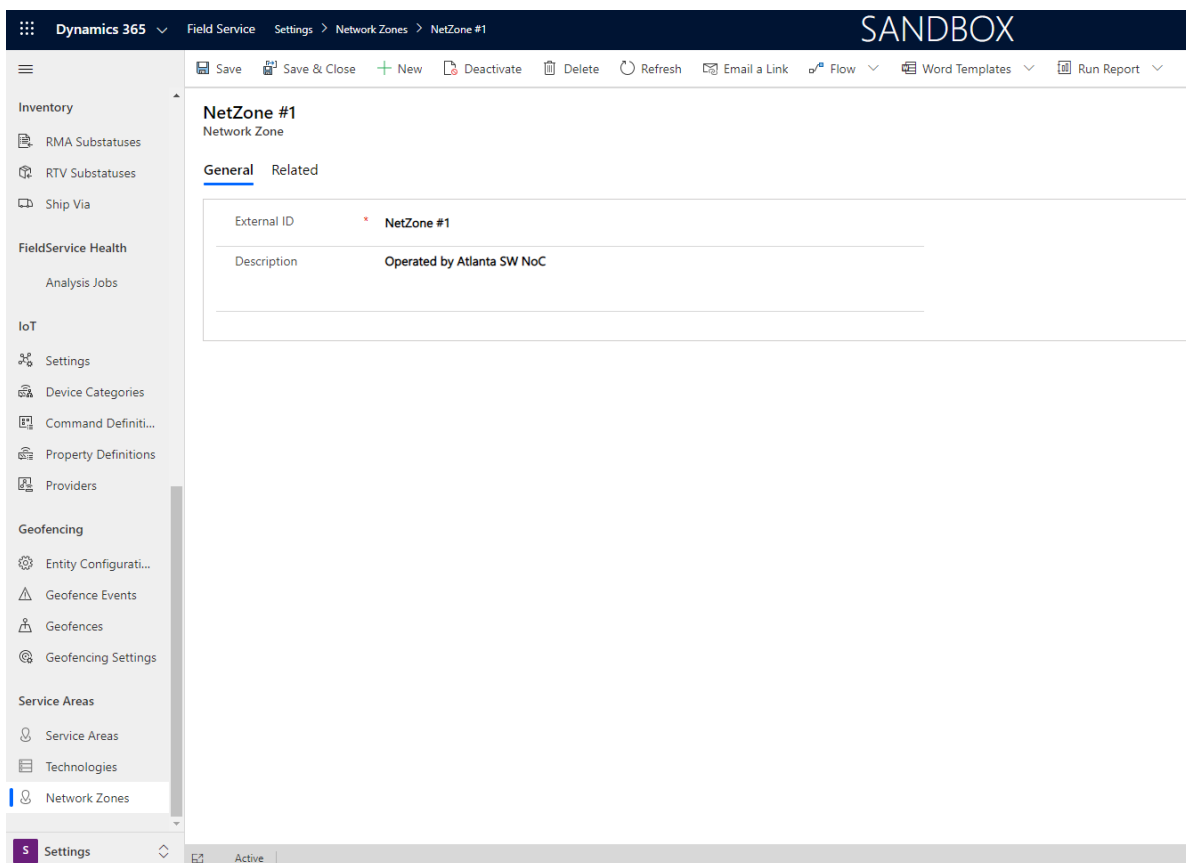
We can now create Service Area. To do so, navigate to Service Areas in the left menu:
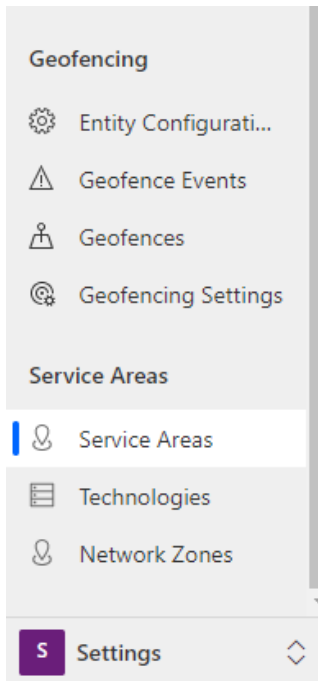
Click "+New" to create new record and fill in all the fields in the form:
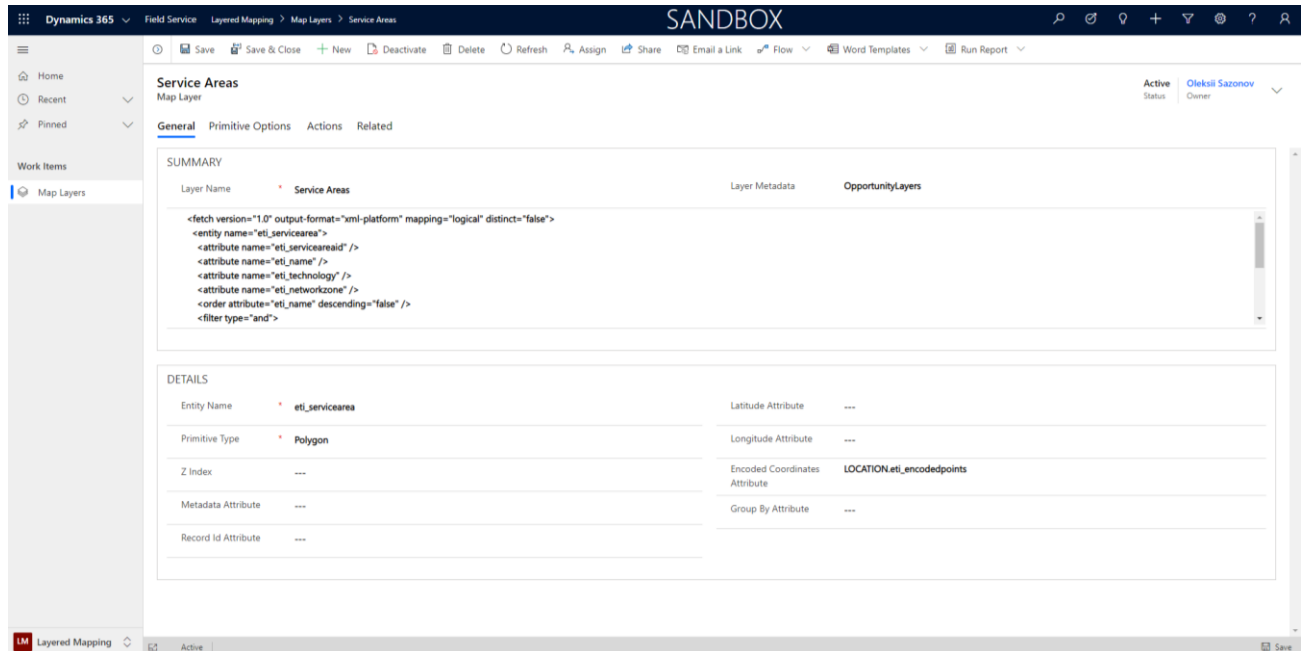
Click "Save & Close" to save your changes and create record.

As soon as service areas are configured, they become available during serviceability check on the lead stage

Map Layers

You are now ready to create Map Layer. Map Layer is a flexible tool allowing you to bring any layer of data into the integrated maps. It is also possible to combine multiple layers to user's needs. You can also embed Actions and customize basic CSS within Map Layer.

To create new Map Layer, navigate to Layered Mapping in the bottom left corner and click "+ New" to create a new one.

Required fields:

Layer Name – name of the Map Layer. This will be displayed on the map for the controlling purposes: to switch on and off the layer.

Layer Metadata. This field represents connector between multiple layers. Please make sure that value in this field is exactly the same between multiple layers if you need to display number of layers at once.

FetchXML Field. This field is required to be able to sort and select data to be displayed on the map. To get fetchXML navigate to Advanced Find in the Dynamics 365 Ribbon.
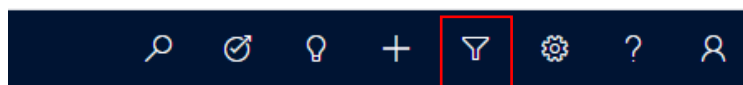
Look for required entity. In this guide we include example with previously created Service Area. Make sure that status of the record is Active. In this particular example we are looking for Geographic Locations to be displayed within the Map.
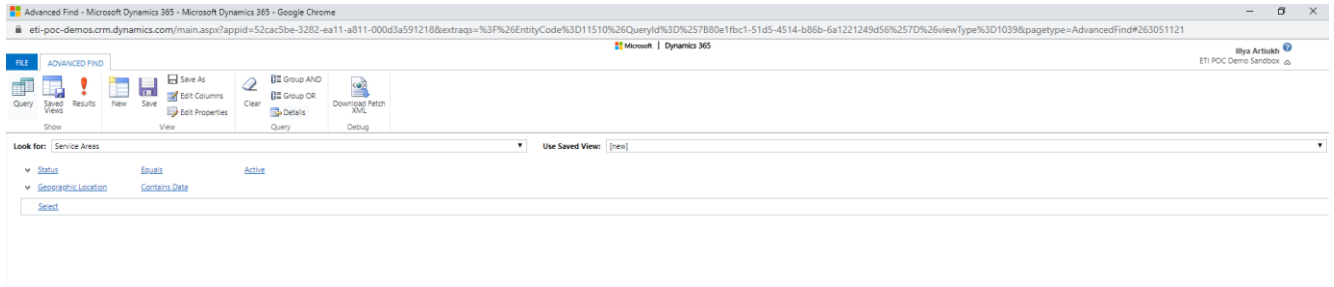
Configure columns for the advanced find view, adding geospatial attributes like latitude and longitude or encoded points is a mandatory step, adding other fields like name, status etc depends on your needs and requirements.

After that click on "Download Fetch XML" to get the code. Copy the code and paste it in the FetchXML text box. Please make sure to rename alias to more user-friendly name.

Fill in Entity Name with the entity schema name from the xml code. This is the target entity at the beginning to do the search within. Primitive Type is the object that you are going render on the map. To display area, choose Polygon. Make sure you update Encoded Coordinates Attribute with the new Alias. Save & Close to save the changes and create Map Layer.

SERVICEABILITY CHECK

Serviceability check is using standard dynamics Lead to Opportunity process and adds-on to its functionality. To create new Serviceability Check, navigate to Sales Area from menu in the bottom left corner of the screen and click "+ New" in the top Menu Ribbon:
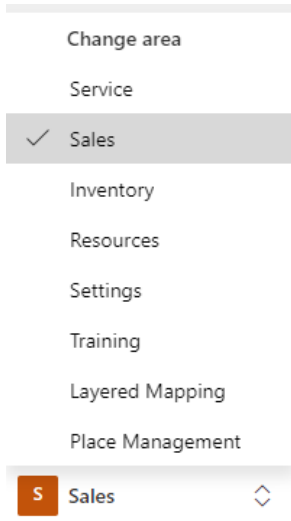
Address Check

To start Serviceability Check type in the address into the search field:

Once the address is keyed in, it will automatically pick up related information about the address, using the map layers and display the address on the map. Based on previous configurations of the service areas you will see them on the lead map. You can filter service areas by selecting related Technologies from the list.

![eti software SOLUTIONS logo]
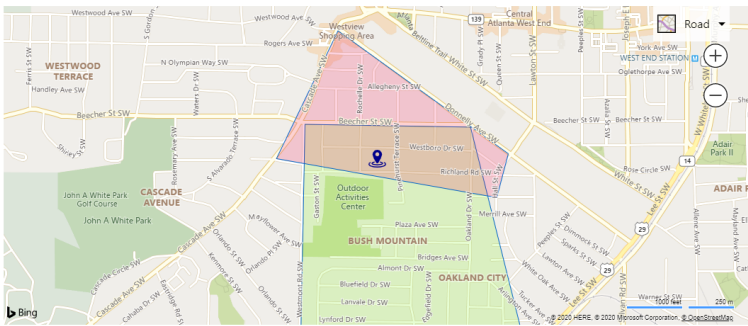
Personal Information

Navigate to Customer Info tab to complete Serviceability check. Fill in First Name and Last name and change Customer type to preferred one (by default – Residential). Fill in the rest of the fields if needed. Click "Save" to save the record. You are now ready to complete Serviceability check with Qualification.

To Qualify Serviceability Check, click on "Qualify" in the top ribbon.

SERVICE ORDER

Service Order process is modified Opportunity Business Process Flow, which helps to keep track of the situation with the Service Order and offers Step-by-step completion of the Service Order.

Summary & Service Location
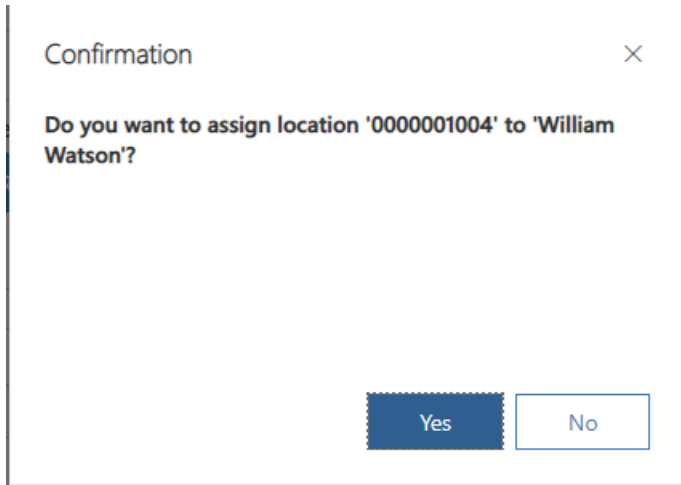
You are transferred automatically to the Summary tab after Qualification of the Serviceability Check. Fill out necessary information that is missing:

Click on Service Location tab to proceed with assigning Service Location.
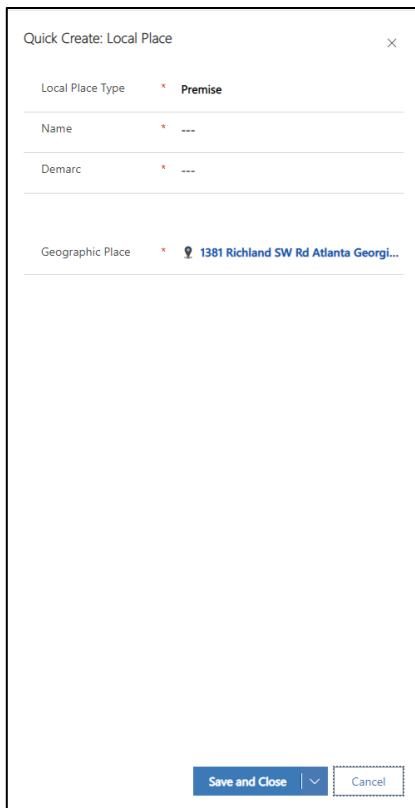
You will see that info from the Place is already pre-filled for existing address. To assign Premise, select desired premise and click on Link icon.

If there is no premise at that Geographic Address – click on Plus icon to initiate Quick Create of the new Premise and then assign it:
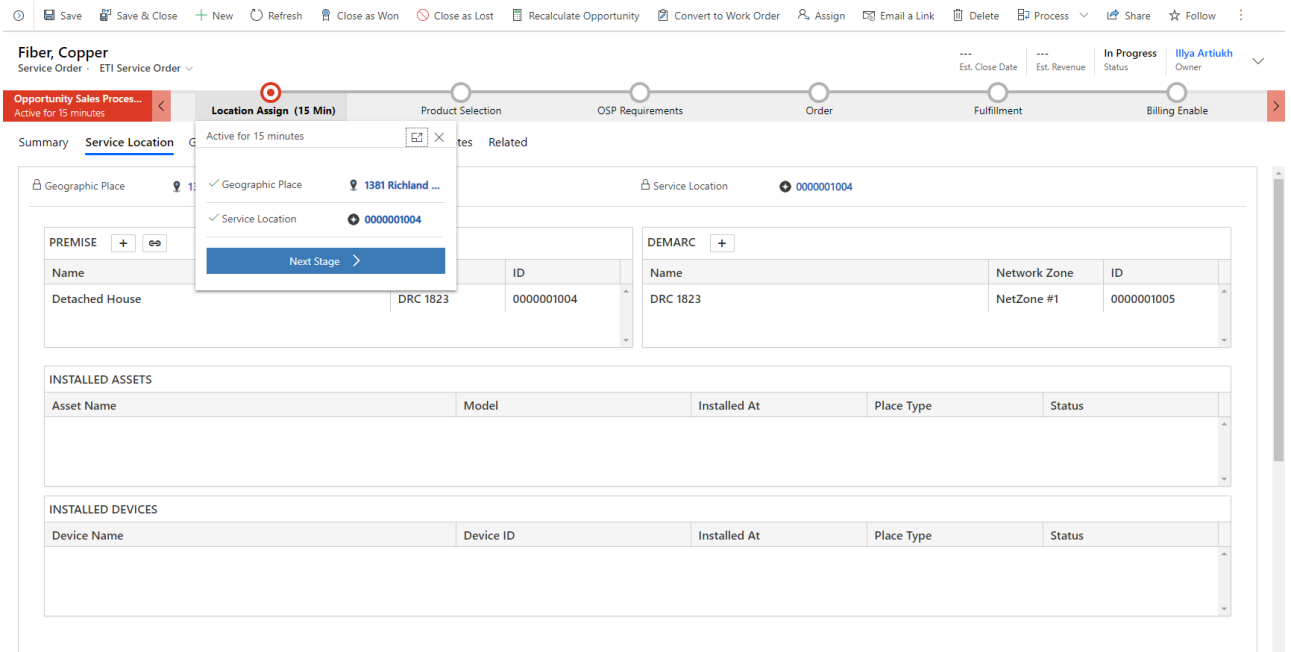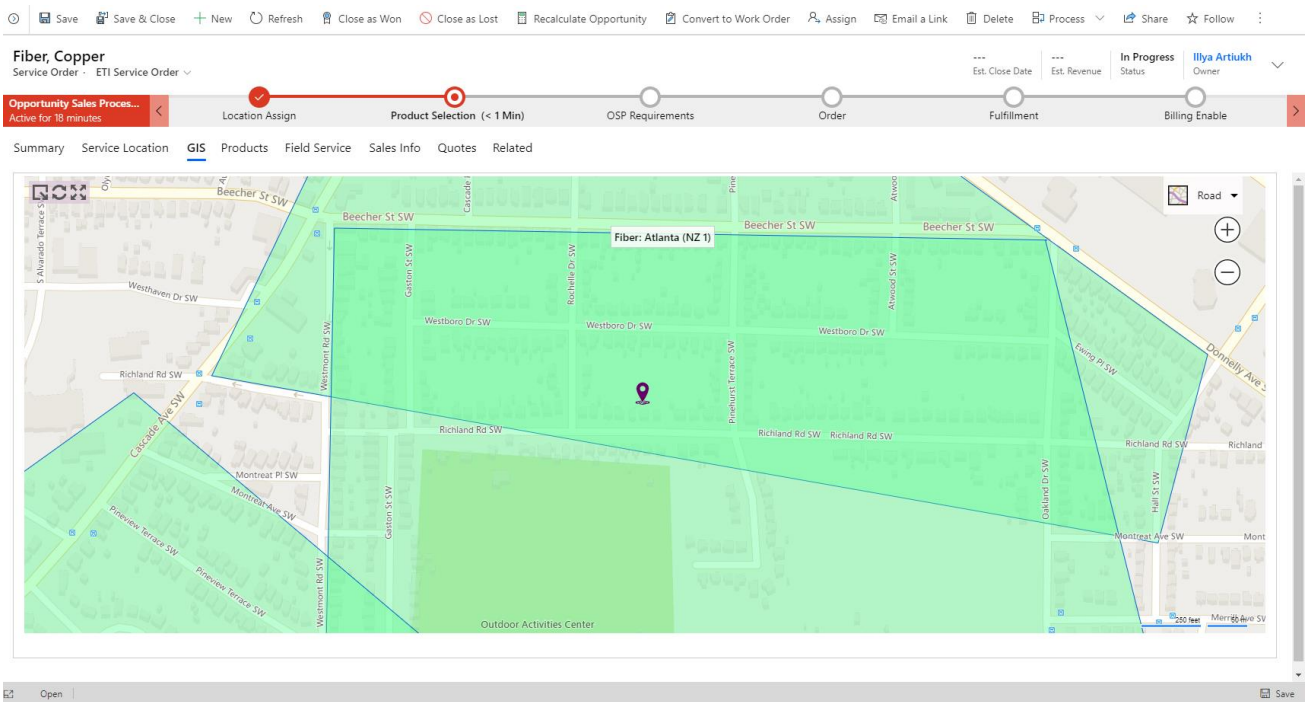
PLEASE NOTE:
Only Local Place of type Premise can be assigned as Service Location.

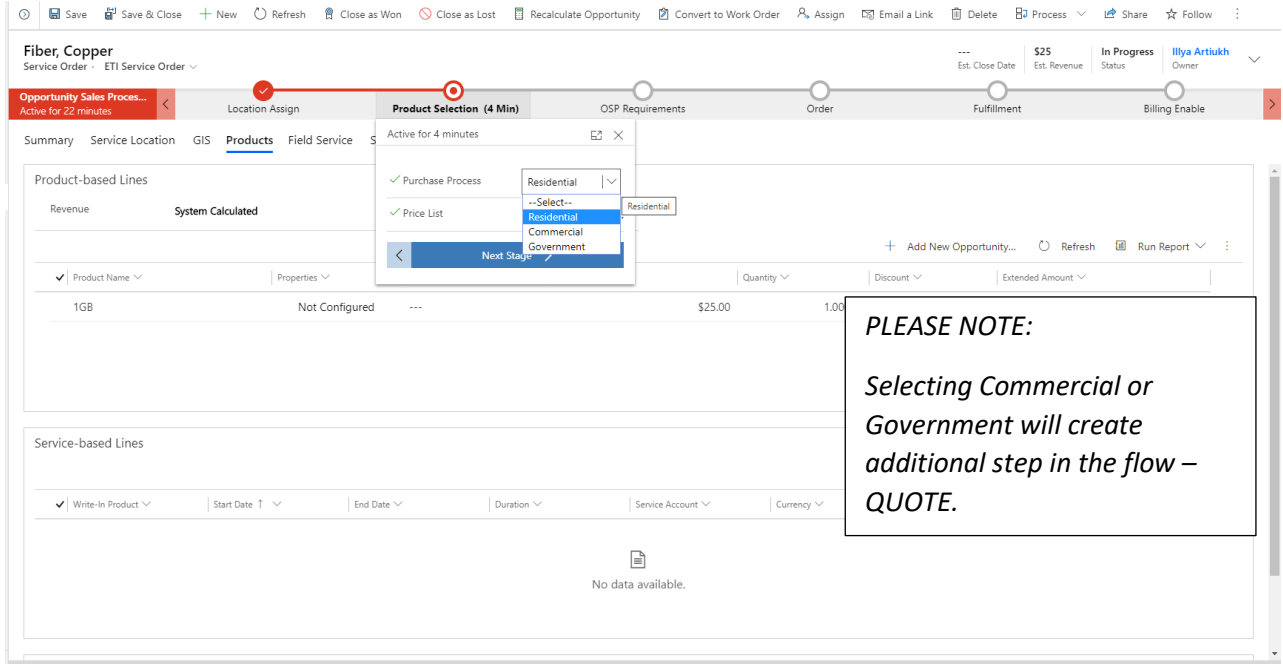Once Service Location is assigned click on the Business Flow Ribbon to ensure you've completed the step:

Click Next Stage to continue with the flow.

If you need to reference back to the Service Areas/Linear Assets or any Map Layers – navigate to GIS tab to display the map.

![eti software SOLUTIONS logo]

Product Selection

To select the product first click on the correspondent step in the flow. Select one of the Purchase Processes.

PLEASE NOTE:

Selecting Commercial or Government will create additional step in the flow – QUOTE.

Navigate to Products tab. This tab has standard Microsoft Dynamics 365 grid of the Opportunity Product. Please pre-create Products or use Write In products when creating Product-Based Line Items.

To finalize the Product Selection, click on correspondent step in the Flow and click Next.

OSP Requirements

At this stage it is required to check the work orders that are going to be initiated based on current situation with the Subscriber. It is simple Yes/No automated process, which prepares Work Orders to be created. Navigate to Field Service Tab to set up the work orders.

Assign Fiber/Circuit ID to start the process. Notice that Incident Type changes each time you select different value for Drop Type/Drop Present/Demarc built/etc.

After operations with the Field Service requirements, click Convert to Work Order in the top menu Ribbon. Your work order/orders will now be automatically created based on Incident Types selected.

To finalize this step, click on correspondent step in the Flow and click Next Stage:

Order

This step is designed to confirm that information has been delivered to Subscriber and Subscriber has issued either verbal or written confirmation of the Order.

Click on Next Stage, once the confirmation is received.

Fulfillment

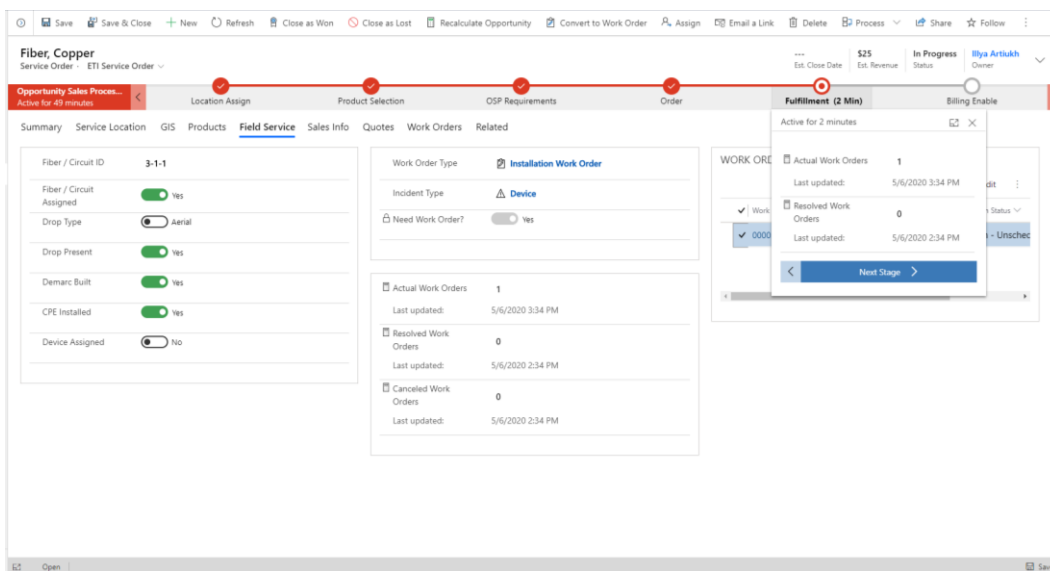This stage is designed to monitor the fulfillment of the service order, by tracking the completion of Work Orders.

You can access related work orders directly from the opportunity.

Click on Next Stage to move to the next step.

Billing Enabled

Last step is Billing enabled. This value is changed to Yes when Subscriber billing has to be initiated.

Click Finish to complete the flow. Click on Close As Won in the top Ribbon to close Service Order with success.

You are now able to work with the Subscriber Account.

MICROSOFT DYNAMICS 365 FOR FIELD SERVICE DOCUMENTATION

For more information or reference, please follow these links to Microsoft Dynamics 365 for Field Service docs:

Learning Field Service:

> https://docs.microsoft.com/en-us/learn/browse/?products=dynamics-field-service

Documentation:

> https://docs.microsoft.com/en-us/dynamics365/field-service/user-guide

SUPPORT & CONTACT

At ETI Software Solutions, our customers come first. That's why we offer around-the-clock Technical Support to guarantee you peace of mind.

Need to reach us? Here's how:

800.332.1078, press option 1, day or night

*Email: techsupport@etisoftware.com

*We would only ask that if your matter is more urgent in nature to give us a call so we can attend to your situation immediately.

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We thank you for your business.