Onyx 7.8 OEP Online Help

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About Onyx Employee Portal

Onyx Employee Portal (OEP) is a browser-based application that enables you to manage all of your customer information from a central database. OEP helps you manage every business interaction with your customers, from initial contact through sales cycles and customer care programs. Using OEP you can gather, integrate, and share valuable customer information with everyone in your organization.

With this type of insight into integrated customer data, you can maximize both sales effectiveness and service responsiveness. OEP helps you manage activities such as marketing campaigns, sales opportunities, customer service, and technical support. The customer-centric design of OEP provides you with a single resource for the customer data that you need to do your job effectively.

OEP provides a single user interface that enables you to seamlessly:

- Access a personalized view of customer information
- Access a powerful, integrated database that contains customer, partner, and supplier information
- Manage sales opportunities, support incidents, service requests, contacts, and tasks

About this Help

The OEP Help system provides a complete reference for all of the features of OEP.

Design

The Help window contains the following panes:

- On the left side is the Navigation pane. It contains three views controlled by buttons in the toolbar: Contents, Index, and Search.
- On the right side is the Topic pane. It displays the selected help topic, or the default help topic.
- Above the Navigation and Topic panes is the Toolbar. It contains buttons for navigating the Help system and printing help topics.

To find a topic

In the Navigation pane, click one of the following toolbar buttons:

- Click **Contents** to browse the table of contents. The contents contains an expandable list of the system's topics.
- Click **Index** to see the list of index entries. Type a word in the top text box or scroll through the list. Topics are often indexed under more than one entry.
- Click **Search** to search for a specific topic. Type one or more words about which you want to find information.

Printing topics

>>Click **Print** on the toolbar. This prints the current contents of the Topics pane.

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Logging on to OEP

Your system administrator provides you with the **User ID**, **Password**, and an OEP **Profile** to use the first time you log on to OEP. To change your password, read **Password Changes** in General preferences.

OEP profiles

OEP profiles are distinct OEP user interfaces that are specially designed for one or more teams within your organization. You are currently logged on to the profile-specific UI that has been designed for you and your team. OEP profiles simplify navigation and make work flow more intuitive in order to meet each team's unique requirements.

If you serve in multiple roles within your organization, you may have access to more than one OEP profile. You may, therefore, want to use one OEP profile to complete one set of tasks, and another OEP profile to complete other set of tasks. When you log on to OEP, you can open your default profile or select an alternate profile.

Setting your default OEP profile

General preferences describe how to set your default profile to the profile you use most often.

Changing OEP profiles

To change profiles, log out, and then log back on selecting the profile you want to use.

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Navigating OEP

OEP is a browser-based application that runs within Microsoft Internet Explorer 10.0 or later. OEP uses a variety of browser features and technologies to display customer information.

Because of OEP's complexity, however, you should not make use of the **Back**, **Forward**, or **Refresh** buttons available from the Internet Explorer toolbars. Using these features may cause unexpected results. Many OEP features provide a refresh button that can be used to reload the data that is on display. If you need to move between features within OEP, use the Navigation bar, a feature's toolbar, the Navigation bar, or other buttons available within the OEP window.

You should also avoid adding any OEP page (other than the login screen) to your browser's Favorites folder. Because OEP displays data that is dynamically generated, Internet Explorer shortcuts (also known as Favorites or Bookmarks) cannot capture enough data to restore customer information properly at a later time.

Important topics

- The OEP window
- Using result lists
- Customizations and permissions

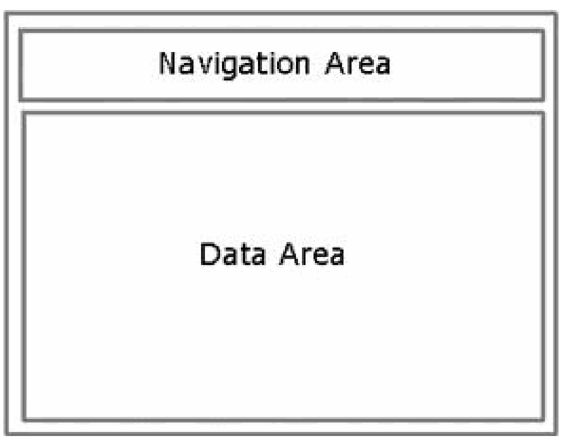
The OEP Window

The primary window of OEP is divided into multiple frames. These frames host the following types of information:

Frame	Description
Navigation bar	Contains buttons that enable you to access the most commonly used OEP features. Contains a hierarchical list of the primary OEP feature groups. Click an item at the root level to reveal a list of related features. Click a feature name to open it in the data area.
Data Area	Displays the customer information that you can review and update. Each OEP feature that uses this frame provides a toolbar at the top with buttons and tabs for navigating within the feature.

OEP further subdivides the Data Area frame into multiple sections depending on the features selected from the other three frames.

The standard layout of the primary window appears in the following diagram.



Certain actions cause additional dialog boxes to appear in front of the primary window. These often contain forms that collect large amounts of information from the user, or they provide features that work in tandem with the contents of the data frame.

Using Result Lists

Many features in OEP display lists of database records in a common table format. The basic operation of these lists is identical between features, although the specifics of each list will vary depending on the requirements of the feature. This topic describes all of the possible elements a list may have.

Not all features display records using this common list format. The documentation for other list formats is described as specific to the feature.

List rows

To view the record referenced by a row in the list, click the row. In some cases the cells of a row may contain hyperlinks that reference different records than the row itself.

Some lists are configured to have expandable rows. Additional information for the record is available in this detail area. Click ▹ to expand the detail area for a row. Click ▿ to hide the detail area for a row.

For lists that have a checkbox column, you can select (or deselect) all the checkboxes in the list by clicking the checkbox in the column heading.

If the data in a row cell is truncated because it is too long to fit in the cell, place the mouse pointer over the cell. A small popup window appears and displays the entire content of the cell. The popup window remains visible until you move the mouse pointer.

List controls

The bottom border of each list has several important functions. On the left side are the page view controls. A list may display all of its records in a single view, or it can display records in pages. To switch to paged view, click . While in paged view you can move between pages by clicking ◂ and ▸ . To view the first page of the list, click . To view the last page of the list, click . To switch to non-paged view, click .

The center of the bottom border has a counter that shows the total number of rows in the list. If the list also has a column for check boxes, the counter indicates how many of the rows are currently selected. If the search for the list has reached the maximum number of rows, the row counter changes color and an asterisk (*) appears next to it.

The right side of the bottom border features the buttons for modifying the configuration of the list. Click to save your current settings. Click to revert any changes to the last saved settings, and click to load the List Configuration Dialog. Like many other aspects of OEP, individual lists can be configured and modified to suit your needs. You can sort the contents of lists, you can change column widths and positions, you can add or remove columns from appearing in the list, and you can set limits on how many rows a list will retrieve from the database. To learn more about making changes to a list and saving them for future use, see Configuring result lists.

Also on the right side of the bottom bar is the refresh button. Click to refresh the contents of the list.

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Customizations and Permissions

Although this documentation strives to provide you with the most accurate and complete information about OEP, your specific experience with the system may be slightly different than what is presented here. This is due to two important factors: customizations and permissions.

Customizations

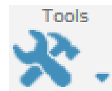
OEP was designed to be modified by the people that implement it. Because of this, your system will most likely have adaptations that maximize OEP's effectiveness within your organization. Contact your OEP system administrator to obtain the information necessary for using the custom and updated features of your OEP installation.

Permissions

Every OEP user account is assigned permissions that dictate what the user can and cannot do to the customer information stored in the database. Your user account may be prohibited from viewing, adding, updating, or deleting certain types of customer records. In cases where the account permissions restrict certain actions, OEP hides or disables the buttons normally used to accomplish those tasks. For example, if your account permissions state that you cannot delete customer records, the delete button will not appear in OEP when you are viewing customer data. If you need but do not have access to a feature or an action that is described in this documentation, contact your OEP system administrator.

About Preferences

You can configure OEP to better meet your personal workflow needs by making changes to your system preferences. There are preference settings for the overall behavior of the application, and there are settings for the default values that are given to new incident, task, and work ticket records.

To open the User Preferences window, click 

and then click **User Preferences**. The preference settings are divided between a series of tabs. Each tab represents a different section of OEP. Click a tab to view the preferences associated with a section.

Click  to save your changes to your settings.

Important topics

- General preferences
- Notification Preferences
- Saving preferences
- Incident preferences
- Task preferences
- Work ticket preferences
- Email preferences
- Date And Time Settings

General Preferences

Click the **General** tab to view the preference settings for the overall operation of ONYX. Enter values in the text boxes and drop down lists.

General settings

The following table lists and describes the options available from the General tab.

Preference	Description
Country	The country to use as the primary address when you create a new customer record.
Language	The language used in ONYX.
Default Profile	The ONYX profile that you use most often. If you have access to more than one profile, ONYX can prompt you to select an alternative to your default profile every time you log on.
Startup View	The view that you want to appear every time you log on.
Default Company Tab	The tab in the bottom half of the Customer page that you want to be active each time a company loads.
Default Individual Tab	The tab in the bottom half of the Customer page that you want to be active each time an individual loads.
List Manager Maximum Result Rows	A value that defines the maximum number of records that ONYX will return when you execute a List Manager search. The default (and maximum recommended) value is 1000.

Preference	Description
Expand Groups with Selected Users	Expands user groups to display all selected users when you load a feature that contains the user list. Leaving this option unselected leaves groups unexpanded, but identifies them as containing selected users.
Enable Spell Check	Select Yes to display the spelling error while entering data in any text box. For more information about spell check feature, see Using Spelling Checker.
Display Notification for New Messages	Select Yes to receive notifications that you have new Messenger messages.
Display Preview Pane in Messenger Window	Select Yes to set the preview pane appear in the Messenger window when it loads. Select No to keep the preview pane hidden.
Default Forecast/Quote Currency	The currency that will be used for new forecasts and quotes. Leave this preference blank to use the system's default currency.
Default Worknotes View	The layout for work notes that display in a record window.

Changing your password

If you are required to type a password each time you connect to ONYX , you can change the password from the General preferences tab.

To change your password

1. Click **Change Password**.

2. Type your old password in the **Old Password** box.

3. Type your new password in the **New Password** and **Confirm Password** boxes.
4. Click **OK** to save your new password.

Notification Preferences

Use the **Notification** tab to set out-of-the-box notifications. This feature is disabled by default.

You can use this feature to:

- **To enable a previously disabled notification:** >>Click **Add** to add a notification.
- To disable one or more notifications:
  >>Select a notification and click **Delete**.
- To disable the Notifications feature, see Disabling Notifications:
  >>In the **General** tab, from the **Display Notifications for New Messages** drop-down list, select **No**.

The following table lists the out-of-the-box Notifications:

Notification Name	Object
Any incident assigned to me	Incident
Any incident assigned to me is modified	Incident
Any incident I created is resolved	Incident
Any incident I created has a new work note	Worknote
Any details of my favorite customer is modified	Customer
Any incident I created is modified	Incident
Any incident assigned to in ONYX CRM	Incident
Any incident assigned to ONYX User	Incident
Incident I am watching has a change	Incident

Incident I am watching has a status of “close”	Incident
Customer I am watching has any change of address	Customer
Customer I am watching has a new incident of type “Service” and status “Open”	Customer
My Favorite customer change of address	Customer
Any task is assigned to me or any task assigned to me is modified	Task

Note: Any number of notifications can be added. Contact System Administrator for more information.

Saving Preferences

Use the **Saving** tab to set the default save actions in OEP. For each action, select the value from the drop down menu that best fits your preference.

Preference	Description
Display Save Message for Email/Templates	Select Yes to have success messages appear when you save email and template records. Selecting No configures OEP to only notify you when a save fails.
Display Save Message for Companies	Select Yes to have success messages appear when you save company records. Selecting No configures OEP to only notify you when a save fails.
Display Save Message for Individuals	Select Yes to have success messages appear when you save individual records. Selecting No configures OEP to only notify you when a save fails.
Display Save Message for Sales/Service/Support	Select Yes to have success messages appear when you save incident records. Selecting No configures OEP to only notify you when a save fails.
Display Save Message for Tasks	Select Yes to have success messages appear when you save task records. Selecting No configures OEP to only notify you when a save fails.
Display Save Message for Work Tickets	Select Yes to have success messages appear when you save work ticket records. Selecting No configures OEP to only notify you when a save fails.

Preference	Description
Incident/Task/Work Ticket/Email/Comments Save Action	Choose Save Only to have incident, task, work ticket, and comment edit windows remain open after you save the record data. Select Save & Close to have the windows close after you save the record data.
Save as Public Template	Check this option to make new email templates public when saved (this option can be unchecked in the template window before saving).

Incident Preferences

Tabs for each of the incident categories appear in the preferences window. Click the appropriate tab to configure the default options for that incident category. Most of the options are used to populate the values of new incident records. Leave an option unselected to prevent data from automatically appearing in the incident information window.

Preference	Description
Type	Select a default type for new incident records.
Status	Select a default status for new incident records.
Assigned to	Select an OEP user to be automatically assigned to new incident records.
Priority	Select a default priority for new incident records.
Product	Select a default product for new incident records.
Source	Select a default source for new incident records.
Set Recall	Check this option to set a recall date for the new incident record. The recall date is relative to the creation date of the incident.
Default Tab	Select the tab you want to be active in the bottom half of the incident information window when it loads.

Task Preferences

Tabs for each of the task categories appear in the preferences window. Click the appropriate tab to configure the default options for that task category. Most of the options are used to populate the values of new task records. Leave an option unselected to prevent data from automatically appearing in the task information window.

Preference	Description
Type	Select a default type for new task records.
Status	Select a default status for new task records.
Assigned To	Select an OEP user to be automatically assigned to new task records.
Priority	Select a default priority for new task records.
Set Recall	Check this option to set a recall date for the new task record. The recall date is relative to the creation date of the task.

Work Ticket Preferences

Click the **Work Tickets** tab to configure the default options for new work tickets. Most of the options are used to populate the values of new work ticket records. Leave an option unselected to prevent data from automatically appearing in the work ticket edit window.

Preference	Description
Type	Select a default type for new work tickets.
Status	Select a default status for new work tickets.
Assigned to	Select an OEP user to be automatically assigned to new work tickets.
Priority	Select a default priority for new work tickets.
Product	Select a default product for new work tickets.
Severity	Select a default severity for new work tickets.
Source	Select a default source for new work tickets.
Default Tab	Select the tab you want to be active in the bottom half of the edit work ticket window when it loads.

Email Preferences

Click the **Email** tab to configure the default options for new email messages. Most of the options are used to populate the values of blank email messages, but some (the Priority, Sent, Date, Draft, and Follow Up settings) are used to configure settings for the default filter for the email filter lists of the Power Page and the Incident information window (but not the email filters in Search).

Preference	Description
Clicking Email Hyperlink Launches	Select an Email application for reading and composing
Default "From" Address	Select an email address that will appear in the From dropdown for new emails
Default Attachment Tab	Select the default tab that is active when adding attachments to email messages
Always Cc yourself	Check this box if you want a copy of all mails you send to be sent to your own address
Show Bcc by Default	Check this box if you want the blind carbon copy address line visible when composing new messages
Include Email Body when Replying	Check this box if you want email replies to include the text of the original message
Enable HTML Source View	Enables the option to view the source HTML for emails and email templates
Character Set	Select a default character set for new emails

Preference	Description
Enable Character Set Selection	Enables the option to change the character set of an unsent email
Priority	Select a default priority setting for emails you create (high, normal, low), and for the default filter
Sent	Select a default setting for emails sent to you or by you
Date	Select a date setting for the default filter
Draft	Select a draft setting for the default filter
Follow Up	Select a follow up setting for the default filter

Configuring Result Lists

Most lists in OEP can be configured to display their information in a format that best suits your needs. Depending on the list, you may be able to change which data columns appear in the list, each column's position in the list, the maximum number of records the list returns, and the default sort order of the records. Some configuration can be done directly to the list itself, but other tasks are only possible using the List Configuration Dialog (LCD).

To learn more about working with records in a list, see Using result lists.

To view the LCD from a list in OEP, click in the lower right corner of the list.

To save your changes directly from the list or within the LCD, click . The entire state of the list will be saved. This saves all configuration items located on the LCD, and includes the current column widths and the view state (multiple pages vs all records visible at once).

To discard any unsaved changes to a list and return to the saved settings, click . This button is visible in the lower right corner of a list and appears in the LCD. Only available within the LCD is another button that you can use to return the list to the system default settings. Click to discard all modified changes and view the list as it is configured by your system administrator.

Configuring data columns

Data columns in a list have several configurable properties. A column's width and position in a list can be changed. Columns can even be removed from lists entirely.

To change the width of a column, grab the vertical border in the column heading with the mouse and move it to the left or right. Release the mouse button when the column reaches the desired width. Some column widths will have size limits set for them. If you exceed a limit, the column will only size to the limit after you release the mouse button.

You can change the order of columns from a list or from the LCD. To change the order of the columns directly from the list, place the mouse pointer over a column heading and click and hold the mouse button. Drag the column over another column heading in the list. Release the mouse button and the dragged column moves to the right of the target column. You can also drag columns to and from the detail area of a list. To move a column in or out of the detail area, the area must be visible.

With the LCD you can change the order of data columns and even add and remove columns in the list. There are two list boxes in the LCD that contain the names of data columns. The first, Available Fields, contains the data items that are retrieved as part of the list search but do not appear in the list. The second list box, Selected Fields, contains the data items that do appear in the list.

To move data columns from the Available Fields to the Selected Fields, click the name of a one or more columns to select them and click . To move data columns from the Selected Fields to the Available Fields, click the name of one or more columns to select them and click .

Data columns in the Selected Fields list box appear in the same order as they appear in the list. The further down a column appears in the Selected Fields list box, the further to the right it appears in the list. To move a column, select it and click  to move it down or  to move it up. The bottom half of the Selected Fields list box contains the data columns that appear in the detail area of the list. These fields appear under the label DETAIL. To move a column from the header row to the detail area (or vice versa), select it and click the appropriate button until the column moves to the desired position.

If a data column has an asterisk (*) next to its name, then the column contains a hyperlink that you can click to open an associated OEP record.

Configuring the sorting order

You can sort a list by clicking one of the column headings. A pointer appears next to the column heading that identifies the direction in which the list is currently sorted. Click a column a second time to reverse sort the list.

Using the LCD you can configure the list to sort by up to three columns each time it loads. Under the **Sort** label are three dropdown lists. Each list contains the names of the columns that appear in the Selected Fields list box. Select a column in one or more of the drop down lists to use as sort criteria. For each dropdown list that contains a column name for sorting, select a sort order by clicking the icon to the right of the list. The icon indicates an ascending sort, while the icon indicates a descending sort.

Note: You cannot sort a list from a detail area field by using the mouse. Use the LCD to configure a list to sort by a detail area field.

Maximum row retrieval

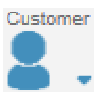
You can limit the number of records the list will retrieve when it searches. Type a value in the Maximum Rows text box to set the limit for the search. If your search exceeds the limit set here, the row counter changes color and an asterisk (*) appears next to it in the bottom border of the list.

About Customers

Almost all OEP data and processes are organized around customer records. Customers in OEP fall into one of two categories: companies or individuals. A company is an organization, and an individual is a person. Company and individual records can be linked to one another to indicate relationships of employment or corporate ownership.

Most actions in OEP begin with a company or individual in mind. Almost all other OEP data records must be linked to a company or individual record before they can exist within the system.

Most customer information is managed through the PowerPage.

Click 

on the Navigation bar at any time to access the PowerPage.

The PowerPage displays information about the customer, and it provides links to edit the customer's demographic information. The customer information that appears on the PowerPage is often referred to as the "active customer record". Several OEP features that are described in this documentation refer to the active customer record as the owner of their data.

Important topics

- About the PowerPage
- About Literature
- About Products
- About Surveys
- About Campaigns
- About Comments
- About Scripts

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About Campaigns

Campaigns provide you with the necessary tools to manage all sales and marketing programs that your organization creates. This feature provides a powerful and flexible way to:

- Plan and track marketing activities including public relations, promotions, and trade shows.
- Manage seminars and training programs.
- Manage targeted sales programs.
- Track the success of direct-mail campaigns.

The campaign feature consists of:

- Campaigns - The name of an activity (or group of events).
- Tracking codes - The identifier for a specific event or activity (such as a specific mailing, seminar, or advertisement) that is part of a campaign.
- Milestones - These allow OEP users to define actions for each tracking code in a campaign, and include:
    - Milestone categories - The categories defined for tracking code milestones.
    - Milestone actions - The individual actions required to meet milestones in a campaign.

To view the campaign information for the active customer record, click **Campaigns** within the Customer submenu on the Navigation bar. The list of campaigns for the active customer record appears in the Data Area frame.

To view the campaign information for the active customer record, select the **Campaigns** tab on the bottom half of the PowerPage. The list of campaigns for the active customer record appears in the bottom half of the Data Area frame.

Important topics

- Managing campaigns
- Tracking codes and milestones
- Selecting tracking codes and milestones

About Comments

Comments enable you to record additional customer information that you may want to save outside the scope of an incident or task. You can enter any type of information in a comment, such as a customer's opinion (“liked the conference”) or judgment (“voted against the initiative”). Additionally, a comment could include more personal customer information, such as a customer's preference (“prefers to stay at the Hilton”) or their family member's names. Any number of comments can be associated with a customer.

To view the comment information for the active customer, select the **Comments** tab on the bottom half of the PowerPage. The list of comments for the active customer record appears in the bottom half of the Data Area frame.

Important topic

Managing comment information

About Contacts

A contact can be an employee or a representative of a company (internal contact), or a company or individual (external contact) who has a specific or functional relationship with a customer. Contacts can be used for companies and individuals, as well as for incidents, tasks, products, and work tickets.

The Contacts feature enables relationships to be captured that are not direct relationships in the hierarchy of a company's structure, but rather ancillary relationships that exist in business.

A primary contact is an external contact who has been identified as the preferred contact. Many records can have multiple external contacts. However, the primary contact is the one that should be communicated with initially.

Contact information is available in many different places throughout OEP. Click a topic below to learn more about using contacts within a specific OEP feature.

Important topics

- Managing contacts (customers)
- Selecting contacts (products)
- Managing contacts (incidents)
- Linking a primary contact (tasks)
- Linking work tickets

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About Email

OEP has a fully functional email client for reading and composing email messages. All emails sent within OEP are recorded and tracked in the database. Emails are associated with customer and incident records. There are tabs for reviewing emails on both the PowerPage and the incident information window.

Important topics

- Viewing email information
- Managing email information
- About email templates

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About Home Page

The Home Page is a personalized starting point for your interaction with OEP. You decide what information to display and where to position it. You can list important and frequently used customers, incidents, tasks, and work tickets on the Home Page.

The Companies and Individuals section of the Home Page consists of Favorite and Top 10 (most recently updated) customers.

To view the Home Page, click 

in the Navigation bar. You can also set the Startup user preference to initially display your Home Page when you access OEP.

Important topics

- Configuring the Home Page
- Configuring the company and individual section
- Configuring Navigator Filters
- General preferences

About Incidents

The Incidents feature provides the primary means for tracking activities associated with a customer. Incidents exist in three different standard types: sales opportunity, service request, and support incident. These types are explained in further detail below. All incidents are tied to a customer record during their lifespan. Incident summary information is visible from a customer record in the PowerPage.

Incidents can be retrieved from a customer PowerPage record, or through searches in QUICK! Search or Navigator.

Incidents can be broken into smaller pieces called tasks. Each incident can use one or more tasks to divide the work of an incident among several users or into more manageable portions.

Each incident can have a revenue forecast or purchasing quote attached to it. These items are part of the Forecast and Quotes feature. A forecast is a sales projection and a quote is a formal offer to a customer (which is usually followed by an order).

Sales opportunities

Sales opportunities are incidents that track interactions with a customer during a sales cycle. Through a sales opportunity you can record the progress of a potential sale to a customer from the initial contact through the final order.

Create a sales opportunity each time you establish contact with a potential (or existing) customer regarding a possible sale. During the sales process record each telephone call, meeting, and presentation. By recording these instances you can easily review and monitor your sales pipeline at any time during the sales process.

Service requests

Service requests are incidents that track the progress of customer service issues. Through a service request you can log incoming service calls, capture status changes, record actions taken, hand out assignments, and track the amount of work completed.

By tracking and measuring the relevant details of your service requests, you can establish a proactive method for managing your customer service needs, thereby ensuring the highest possible level of customer care.

Support incidents

Support incidents are incidents through which you can manage problematic issues customers have with your products and services.

By collecting information about customers when they call for support and assistance, you can then measure the amount of effort your organization is dedicating to specific issues or customers. With this information you can identify where to focus your resources to manage customer problems most effectively.

Important topics

- Viewing incident information
- Managing incident information
- About Forecasts and Quotes
- About Tasks
- About Scripts

About Literature

The Literature feature manages customer mail, email, and fax orders for electronic files or printed material.

You can create orders for any combination of products. After you define the order, OEP assigns it to the fulfillment server, freeing your workstation to continue with other tasks. Examples of different literature requests include technical, marketing, and promotional information.

You can process a literature order immediately or in a batch. If your customer requires the order as soon as possible, you can choose to mark it for immediate real-time processing. Otherwise, OEP processes all orders once a day, at a time specified by your system administrator.

Click **Literature** within the Customer submenu on the Navigation bar to view the literature orders for the active customer record.

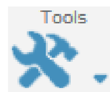
Important topics

- Viewing literature order information
- Managing literature orders

About Messenger

Messenger enables you to send messages to other OEP users to communicate issues regarding customers, tasks, and incidents. Messenger behaves much like an internal email system, and you can attach links to OEP entities that recipients can open directly from within a message.

OEP can be configured through the General Preferences to notify you when you have a new message.

To open the Messenger window click 

, and then click **Messenger**. A window opens and lists the messages that are in your Messenger inbox.

Important topics

- Reading messages
- Sending messages

About Products

The Products feature tracks the goods your company has shipped to your customers. This feature helps you manage a wide variety of product information including ship dates, serial numbers, quantities purchased, and customer contacts.

Click the **Products** tab within the Customer Power Page to view the products for the active customer record.

Important topics

- Viewing product information
- Managing product information

About Scripts

Scripts in OEP streamline common business processes by collecting specific information through a series of forms. The information is saved to the database and the script may also create one or more associated records (customer, task, and incident, for example) as needed. These scripts can save you the time required to perform certain tasks.

Scripts can be assigned to customer and incident records. To view the list of scripts assigned to a customer, click the **Scripts** tab on the bottom half of the PowerPage. To view the lists of scripts assigned to an incident record, click the **Scripts** tab on the bottom half of the incident information window.

The purpose and function of the scripts available to you will depend on the features of your OEP system. For more information about a specific script, contact your system administrator.

Important topics

- Managing scripts
- Completing a script

About Surveys

Surveys enable you to capture information from a customer. Common types of surveys include those for customer satisfaction and market segment profiling. Surveys provide the opportunity to learn more about your customers and better target their needs.

The Surveys screen is divided into two halves. The top half lists the surveys that have been assigned to the active customer record. The bottom half lists the questions and responses (if any) of the selected survey. Click a survey in the top list to view the questions in the bottom list.

Each question in a survey can have one of the response types listed in the following table.

Type	Description
Single response	A list from which you can select a single predefined answer.
Multiple response	A collection of items with check boxes from which you can select multiple predefined answers.
Free-form text	A text box in which you can type any information necessary to answer the question.
Combination	A single or multiple response answer type that displays a free-form text box when specific responses are selected from the available options. For example, selecting Other from a single-response list causes a text box to appear in which you can type more information.

To view the survey information for the active customer record, click **Surveys** within the Customer submenu on the Navigation bar. The list of surveys for the active customer record appears in the Data Area frame.

Important topics

- Managing surveys
- Completing a survey

About List Manager

List Manager is a tool used for the bulk processing of OEP records. List Manager provides the ability to generate lists of customers (companies or individuals) or customer-related information. Using the available processes you can perform bulk actions on these lists, saving the time and effort of having to process records one at a time.

From the List Manager window you build searches based on customer search criteria. After generating a result list and configuring the columns of information returned by the result list, you select a process to apply to multiple records. Once a search and its results are configured to your liking, save it and reuse it as needed.

To view the List Manager window, click 

and then click **List Manager**.

Important topics

- Selecting search criteria
- Selecting the returned list of columns
- Working with saved searches
- Working with a results list

About Work Tickets

Work tickets represent activities or tasks that can be linked to almost any other entity in OEP, including customers, incidents, and other work tickets. Work tickets contain information regarding the work to be completed, and provide tracking and resolution information. Users can also type notes as they monitor the progress of a work ticket.

Work ticket data is accessible from the Navigation Bar in two places.

- Click **Work Ticket** within the **Add New...** submenu to open a blank work ticket in a separate window.
- Click **Work Tickets** within the Customer submenu to display the list of work tickets that are linked to the active customer record.

Important topics

- Adding and editing work tickets
- Adding and reviewing worknotes
- Linking work tickets
- Selecting keywords
- Using the spelling checker
- Documents attached to work tickets

Navigator

Navigator, the primary search engine in Onyx, enables you to quickly find the information you need, using as many or as few criteria as necessary. Using Navigator you can view, print, and export records, merge customer records, update records, and perform several common tasks without having to open the related page.

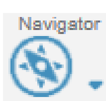
You can mark Navigator queries as mobile bookmarks. These bookmarks are displayed on the **Home** page when you log on to . If your administrator has configured user-specific bookmarks, you can also view bookmarks for tasks and incidents assigned to you.

The **Navigator** window is divided into two parts: The **Search Criteria** window to the left of the window, and the **Search Results** window to the right. When you run a query, the **Search Results** window opens in full-screen mode as a new tab within Navigator. Tabs in Navigator enable you to open multiple Navigator queries simultaneously.

To customize the look and feel of the Navigator theme contact your System Administrator.

To access Navigator

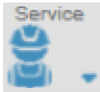
You need necessary permissions to access Navigator as it is governed by UI Resources. For more information, contact your System Administrator.

- Click 

on the toolbar.

  The **Search Criteria** window appears where you can select the search type. You also can access Navigator by clicking one of the following buttons on the Header bar. The value in the **Search Type** field defaults based on the button that you click.

- Click 

to open the **Search Criteria** window with Sales Opportunities as the default search type.
- Click 

to open the **Search Criteria** window with Service Requests as the default search type.
- Click 

to open the **Search Criteria** window with Support Incidents as the default search type.

You can set the Navigator as a default starting page by changing the appropriate settings in the **User Preference** window.

Following is the complete list of entities supported by the Navigator:

- Companies
- Individuals
- Sales Opportunities
- Service Requests
- Support Incidents
- Work Tickets
- Email
- Appointments
- Scripts
- Forecast
- Products
- Documents
- Sales Task
- Service Task
- Support Task

What would you like to do?

- Searching for Records
- Viewing and Modifying Search Results
- Performing Common Tasks
- Editing Records
- Working with Bookmarks

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Searching for Records

Using the **Search Criteria** window in Navigator, you can specify the search type and search criteria on which to base your search. The records that fulfill the specified criteria are displayed in the **Search Results** window.

The **Search Criteria** window provides a flexible way to:

- Determine the criteria on which to base the search.
- Enter parameters for each search criterion and run a search to view specific information.
- Save and bookmark personal and public queries, and display them on the **Home** page or on **Onyx Mobile.**

What would you like to do?

- Selecting Fields to Search by
- Understand Hierarchical Relationships
- Specifying Search Criteria
- Performing a Search
- Saving a Search
- Running a Previously Saved Search

Selecting Fields to Search by

Based on the search type you select, a set of default fields become available for you to search by. You can use the **Search Criteria Field Selection and Administration** window to include additional fields for your search.

Note: You can change search criteria only if you are provided with appropriate rights. You need the necessary permissions to access Navigator as it is governed by UI Resources. For more information, contact your System Administrator .

To select fields to search by

1. In the **Search Criteria** window, select a **Search Type**. The default search criteria for the selected search type appears.
2. Click and then click **Search Criteria** to open the **Search Criteria Field Selection and Administration** window.
    - The **Selected** column lists the current search criteria fields in the default display order in which they are listed on the **Search Criteria** window.
    - The **Available** column lists the fields that can be included as search criteria on the **Search Criteria** window.
    - The **Disabled** column lists the fields that cannot be included as search criteria on the **Search Criteria** window.
3. Select the fields to view in the **Search Criteria** window.
    - To include a field as a search criterion, drag it from the **Available** column and drop it to the **Selected** column.
    - To remove a field as a search criterion, drag it from the **Selected** column and drop it to the **Available** column.
    - To disable a field on the **Search Criteria** window, drag and drop it to the **Disabled** column.

- To understand how hierarchical fields are automatically moved when you move their parent or dependent fields, see Understanding Hierarchical Relationships.

4. Click to save your changes as your default search criteria for the selected search type. Click to restore the default search criteria, and close the window.

Note: Drag and set the order of fields as desired on the **Selected** column. When you click , the display order of fields on the **Search Criteria** window is saved to match the order of fields on **Selected** column.

---

5. To enter search values for the selected search criteria, see Specify search criteria. For information on saving a search, see Saving a search.

To edit the field properties

1. Open the **Search Criteria Field Selection and Administration** window.
2. Double-click a filed that you want to edit. The **Edit Field Properties** window appears.
3. Edit the name in **Caption** field.
4. To make a field as a required field, select the **Required** check box.
5. Click **Save**.

Understanding Hierarchical Relationships

The **Search Criteria** and the **Search Results** windows may include fields that are hierarchical, meaning that the values in those fields depend upon values entered in preceding fields.

For example, because the values for the field State depend on the value for the field Country, Country is the parent field for the dependent field State. This hierarchy can exist at several levels; therefore, a field can be both a parent field as well as a dependent field.

For example, in a hierarchy of Resolution Code 1 - Resolution Code 2 - Resolution Code 3, the field Resolution Code 2 is a parent for the field Resolution Code 3, but a dependent for the field Resolution Code 1.

Note: Hierarchical relationships are applicable only to fields where you select an item from a drop-down list.

Note: You can move a parent field from one column to anyone of the other two columns among Selected, Available, and Disabled columns. When you move a parent field, the associated child fields move along with the parent field, but you cannot move a child field alone.

Performing a Search

To perform a search

1. In the **Search Criteria** window, select a **Search Type**. The default search criteria for the selected search type appears.
2. To add or remove search criteria, see Select fields to search by.
3. Enter values for each criteria that you want to search by. Use the available search operators to define search parameters. For more information, see Use search operators and pickers.

   - For fields that use search operators, click the default search operator, select the desired search operator from the drop-down list, and press the **Tab** key. The focus shifts to the text box next to the search operator.

   - For fields that use drop-down lists or tree pickers, click the drop-down arrow, and select a value from the drop-down list.

   > **Note:** You can select multiple values in drop-down lists or tree pickers.

4. Press the **Tab** key to move to the next search criteria in the panel, and continue to enter values.
5. After entering the desired search values, click to run the search based on the parameters you entered.
6. The **Search Results** window opens in Full Screen mode, listing the records that match the criteria you entered.
7. To view the Search Criteria window where you can modify search criteria, and save the search filter configuration, double-click the vertical bar between **Search Criteria** and **Search Result** window.
8. Click to clear the values you entered. For information on saving the search configuration, see Save a search.

Saving a Search

A search is saved as a combination of the selected search criteria fields and result grid columns. To access search results from Onyx Mobile on your iPhone, iPad or Android, you can save a search as a Mobile bookmark. For information about mobile bookmarks, see Mobile Bookmarks.

To save a search

1. In the **Search Criteria** window, enter values for each search criteria.

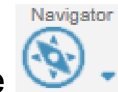
   Note: Click , then click **Result Columns**, and in the **Search Result Field Selection and Administration** window, select the columns, sort order, and maximum rows to display, and page size for the search.

2. On the **Search Criteria** window click . The **Query Explorer** window appears.

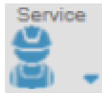
   You can also click after performing an ad-hoc search to save the search criteria and result grid columns to a filter.
3. Enter a **Query Name** for your search.
4. Select the **Bookmark** check box to bookmark the filter for easy access from the Header bar.
5. Select the **Mobile Bookmark** check box to add the filter to Onyx Mobile. When you log on to Onyx, the filter is displayed on the Home Page. The filter name is same as the name of the saved Navigator query.
6. Select the **Homepage Query** check box to add the filter to the Home page.
7. Click to save the query.

   Note: When click , the query is saved under Personal Queries section. If you want to make a query as a public query, drag the query you created from Personal

Queries section and drop it to the Public Queries section.

Note: Depending on the filter's search type, the filter is available in the **Bookmarks** section under the 

, 

, 

, or 

buttons.

Note: If you change the search criteria for a saved filter and save your changes, the Search Criteria panel is refreshed with the new search criteria and any previously entered values for the search criteria fields are cleared. To view the values you previously entered, reload the saved filter.

Right-click a query to perform the following actions:

- Edit Query
- Clone Query
- Rename Query
- Delete Query

! **Important:** To perform these actions, you need to have the **UI:OEP.Navigator.PublicQuery.Manage** permission.

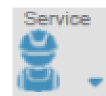
Running a Previously Saved Search

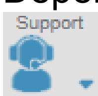
You can access a previously saved filter from the **Bookmarks** section on the toolbar, or from within Navigator. When you run a previously saved filter, search results are displayed in full screen mode in Navigator.

To run a previously saved filter from the Header bar

1. Depending on the filter's search type, click 

, 

, 

, or 

on the tool bar.
2. Expand the **Bookmark** menu for the desired search type, and select the filter to run.

To run a previously saved filter from within Navigator

1. In the **Search Criteria** window, click . The **Query Explorer** window appears.
2. Double-click the Public Queries or Personal Queries you want to run.
3. The Search Results are displayed in a new tab in full screen mode, displaying the filter results based on the result grid configuration associated with the filter.
4. To view the **Search Criteria** window where you can modify search criteria, and save the search filter configuration, double-click the vertical bar between Search Criteria and Search Result windows. For information on saving the search configuration, see Save a search.

Note: If you change the search criteria for a saved filter and save your changes, the **Search Criteria** panel is refreshed with the new search criteria and any previously entered values for the search criteria fields are cleared. To view the values you previously entered, reload the saved filter.

Viewing and Modifying Search Results

The **Search Results** window displays the results of a search based on the criteria you entered. From the **Search Results** window, you can select which fields to see in the Search Results grid, and you can select multiple rows to update multiple records simultaneously. You can also use this window to merge, print, and export records.

What would you like to do?

- Viewing or Editing a Single Record
- Selecting the Fields to View
- Printing and Exporting Records
- Performing a Batch Update
- Merging Customer Records
- Performing Common Tasks
- Editing Records in Navigator
- Viewing Customer Summary Information

Viewing and Editing a Single Record

When you perform a search, the results of your filter appear in the **Search Result** window.

- Double-click a row in the **Search Results** window.

  The details for that record appear in a new window, where you can view and edit them.

Note: If you are viewing results for Sales Opportunities, Service Incidents, Support Requests, or Tasks, you can click the **Next** or **Previous** button at the top right of the incident or task record window to browse to the next or previous record from the search list.

- Point to a record to highlight it, and then right-click to enable the **Action** menu.
  - Click any action button to perform specific tasks. For information on the tasks you can perform, see Performing common tasks.
- Click View to view the **Search Results** list in tile view or click Grid to view the **Search Results** in list view.
- Click to print the list of records.
- Click to export the list of records.
- Click to restore the list of records.
- Click to update the selected records.
- Click to merge the selected records.

Selecting Fields to View

You can determine which fields display in the **Search Results** window based on the kind of information you're looking for.

Note: To save a search as a Mobile Bookmark, include the mobile-specific columns specified by your administrator in the **Header** or **Detail** columns.

Note: You can change search results only if you are provided with appropriate rights. You need the necessary permissions to access Navigator as it is governed by UI Resources. For more information, contact your System Administrator .

To select fields to view

1. In the **Search Criteria** window, select a **Search Type**. The default search criteria for the selected search type appears.
2. Click and then click **Result Columns** to open the **Search Result Field Selection and Administration** window.

   - The **Selected** column lists the current search result fields in the default display order in which they are listed on the **Search Result** window.
   - The **Available** column lists the fields that can be included as search results on the **Search Result** window.
   - The **Disabled** column lists the fields that cannot be included as search results on the **Search Result** window.
   - In the **Options** column

     - The **Sort by** and **Then by** drop-down fields sort the search results as per your selection.
     - **Note:** Use to select the sorting order.

- The **Maximum Rows** field allows you to select the maximum number of rows that are retrieved on the **Search Result** window.
- The **Page Size** field allows you to select the maximum number of rows that are retrieved per page on the **Search Result** window.

3. Select the fields to view in the **Search Result** window.

- To include a field as a search criterion, drag it from the **Available** column and drop it to the **Selected** column.
- To remove a field as a search criterion, drag it from the **Selected** column and drop it to the **Available** column.
- To disable a field on the **Search Criteria** window, drag and drop it to the **Disabled** column.
- To understand how hierarchical fields are automatically moved when you move their parent or dependent fields, see Understanding Hierarchical Relationships.

4. Click to save your changes as your default search result for the selected search type. Click to restore the default search criteria, and close the window.

Note: Drag and set the order of fields as desired on the **Selected** column. When you click , the display order of fields on the **Search Result** window is saved to match the order of fields on **Selected** column.

To edit the field properties

1. Open the **Search Result Field Selection and Administration** window.
2. Double-click the filed that you want to edit. The **Edit Field Properties** window appears.
3. Edit the name in **Caption** field and click **Save**.

Printing and Exporting Records

You can print the records displayed in the **Search Results** window to a printer, or you can export them to a CSV or Excel file.

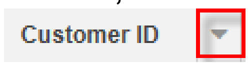
To print records

1. In the **Search Results** window, click . The **Print Results** window appears where you can preview the information before printing.
2. In the **Print** window, select the printer, set printer preferences, and click **Print**.

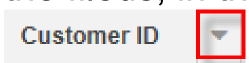
To export records

1. In the **Search Results** window, click , and then select **Export to Excel** or **Export to CSV**.
2. In the **Save As** window, select the file location, type the file name and click **Save**.

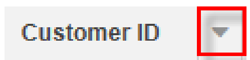
Grouping and Filtering Records

To group the fields, in the **Search Results** window, click the arrow head 

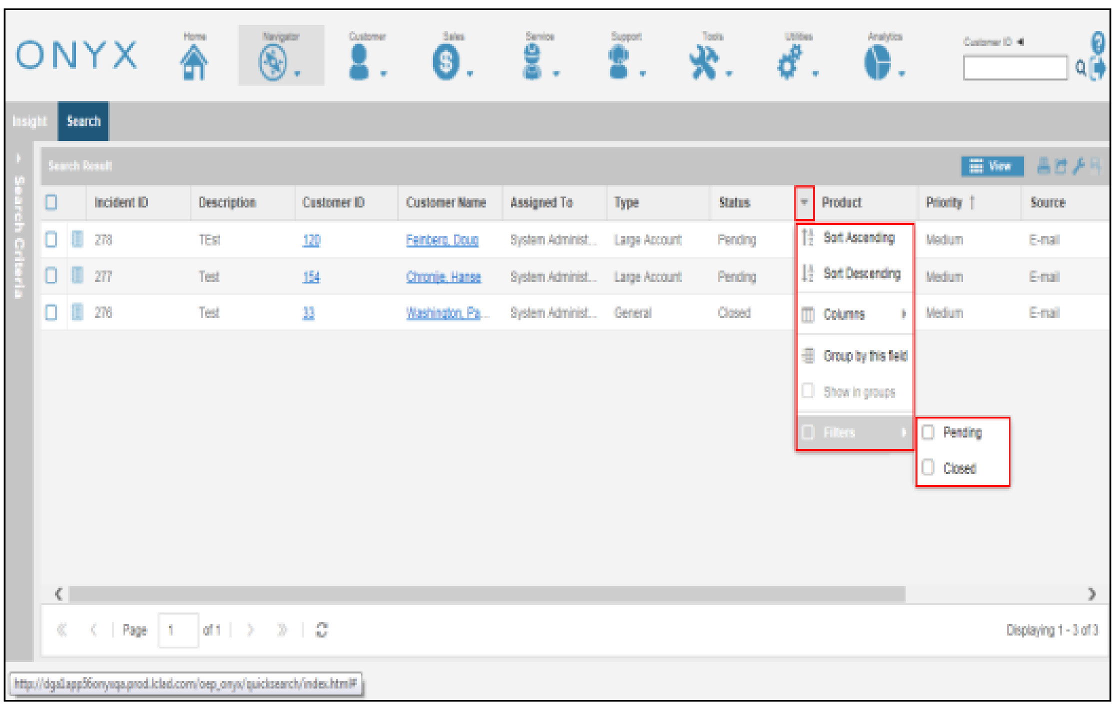
on the column header, and click **Group by this field**.

To ungroup the fileds, in the **Search Results** window, click the arrow head 

on the column header, and clear the **Show in groups**checkbox.

To filter records in **the Search Results** window, click the arrow head 

on the column header, select your search criteria and click **Filter**. You can filter the data based on the condition shown in the following image:



To remove the filtering conditions in the column, click **Clear Filter**.

You can also

- Sort the custom formatted fields like Date, Currency and so on.

- Customise fields which can seek only two responses like yes or no,True or False.

Performing a Batch Update

Using Navigator, you can perform a batch update for sales opportunities, service requests, support incidents, and Work Tickets. The Navigator Batch Update feature enables you to select any number of records from your result list and update one or more specified fields related to that record type. The values that you change apply to all the selected records.

Note: The batch updates are UI resource controlled and therefore you must have appropriate permissions. For more details, contact your System Administrator

To perform a batch update

1. In the **Search Results** window, select the check box to the left of each record that you want to update.
2. In the **Search Results** header, click , and then select **Update Selected Records** to open the **Batch Update** window which displays the fields that you can update in bulk. The fields available in this window depend on the record type that you're updating.
3. Select a value for each field that you want to update, or leave the field blank to retain the existing data.
4. Click to update the selected records with your changes, and close the window. For more details about including columns for batch update, refer to the *OEP Technical Guide*.

Merging Customer Records

If you notice that duplicate records for a single customer exist in the Onyx system, you can merge the records into a single customer record.

If both the source record and target record contain data in the same fields, only the data in the target record is retained. Data from the source record is merged into the target record only if the target record does not already contain data in those fields. All other data in the source record is lost (the source record is deleted after the merge is complete).

All database items that are associated with the source record, such as phone, address, work ticket, email, script, and incident records, are automatically assigned to the target record.

To merge records

1. Perform a search to generate a result list that contains the customers to be merged. This can be done only from Company and Individual search entities.
2. Determine which record you want to retain. This record, called the target record, is typically the one that contains the most complete and accurate data.
3. In the **Search Results** window, click .
4. Two columns, **Source** and **Target** are enabled on the left of the window.
5. From the result list, select the **Target** option beside the record that you want to retain.
6. Click the **Source** option beside the record that you want to merge into the target record. This record is deleted when the merge process is complete.
7. Click to merge the selected records.

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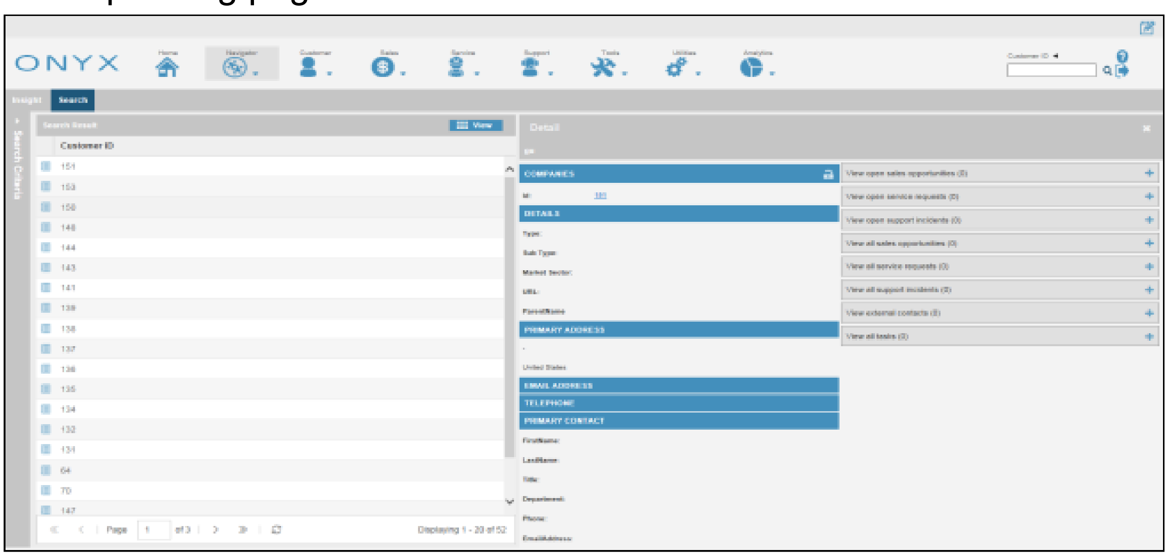
Viewing Customer Summary Information

When you perform a Navigator search for Individual or Company records, the results that match the applied filters appear in the **Search Results** window. You can use these results to view crucial information about your customers within Navigator.

The information displayed in the **Customer Summary** window is configured based on your organization's needs. To add fields to this window, contact your system administrator.

To view customer summary information:

1. In the **Navigator Search Results** window, click to the extreme left of a customer record. The **Customer Summary** window opens, displaying crucial information about the selected customer.
2. Click **ID** in the Company or Individual section to open the corresponding **Customer Power** page.
3. Click the URL to open the linked website.
4. Click an email address to send an email from within Onyx to the selected email address.
5. Click a row in the **More** section to display a list of records that meet the filters configured for the menu item. Click a record to open its corresponding page.



6. Double-click the vertical bar between Search Criteria and Search Result windows to view the **Customer Summary** window in full

screen mode.

Note: In the **More** section in the **Summary** page, field space can be set between the values on the result set.

---

7. Click ✖ to close the **Customer Summary** window.

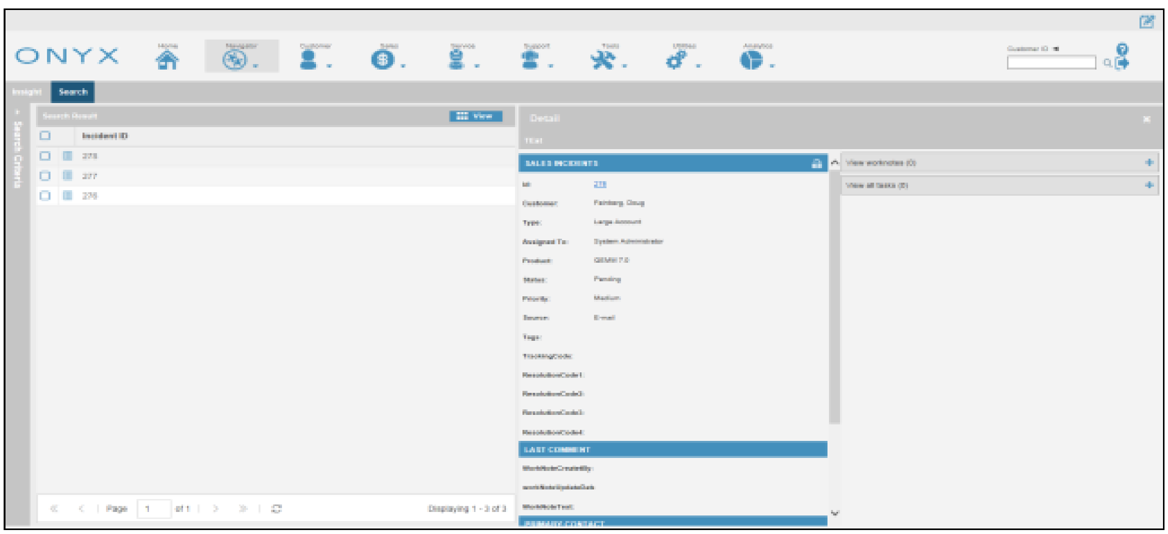
Note: Masking can be applied for the fields present in the **Summary** and **More** Section.

Viewing Customer Incident Information

When you perform a Navigator search for Sales, Service, and Support incidents, the results that match the applied filters appear in the **Search Results** window. You can use these results to view information about your incidents within Navigator.

The information displayed in the **Incident Summary** window is configured based on your organization's needs. To add fields to this window, contact your system administrator.

1. In the **Navigator Search Results** window, click to the extreme left of a customer record. The **Incident Summary** window opens, displaying crucial information about the selected customer.
2. Click ID in the Incident Summary section to open the corresponding **Incident Edit** page.
3. Click **Owner Name** to open the corresponding customer power page.
4. Click a row in the **More** section to display a list of records that meet the filters configured for the menu item. Click a record to open its corresponding page.



5. Double-click the vertical bar between Search Criteria and Search Result windows to view the **Search Criteria** window.
6. Click to close the **Incident Summary** window.

Performing Common Tasks

The Navigator **Action** menu enables you to perform several common tasks for a record that is displayed in the Navigator result grid. Each Action menu option opens a window where you can perform a specific task for the selected record. The **Action** menu is displayed in a horizontal or vertical menu format, as configured by your administrator.

To access and use the Action menu:

- To view the **Action** menu for a record, point to the record to highlight it, and then right-click.
- To view the caption for a button in the form of a tool-tip, on the Action menu, point to the button.
- Click an **Action** menu option to perform a task.

The following table lists the default Action menu options and the corresponding buttons along with the search types that they are available for, and a description of the action they perform.

Button	Search Types that this button is available for	Description
Add External Contact	Companies, Individuals, Sales Opportunities, Service Requests, Support Incidents	Opens the **Add External Contact** window where you can associate a company or an individual with the selected record.
Add Internal Contact	Companies, Individuals, Sales Opportunities, Service Requests, Support Incidents, Work Tickets	Opens the **Add Internal Contact** window where you can assign an internal user to the selected record.

Button	Search Types that this button is available for	Description
Clone Record	Companies, Individuals, Sales Opportunities, Service Requests, Support Incidents, Work Tickets	Opens the **Clone** window where you can clone the selected record.
Create Task	Sales Opportunities, Service Requests, Support Incidents	Opens a **Task** window where you can create a new task to associate with the selected record.
Create Worknote	Sales Opportunity, Service Request, Support Incident, Work Ticket, Task	Opens the **Work Notes** window where you can add work notes to the selected record.
Set Alert	Companies, Individuals, Sales Opportunities, Service Requests, Support Incidents	Opens the **Alert** window where you can add an alert for the selected record.
Set Reminder	Sales Opportunities, Service Requests, Support Incidents, Tasks	Opens the **Reminder** window where you can add a reminder for the selected record.
Add Customer	Work Tickets	Opens the **Search for a Customer** window where you can search for and add customers to the selected record.

Button	Search Types that this button is available for	Description
Watch	Companies, Individuals, Sales Opportunities, Service Requests, Support Incidents	Marks the selected record to be watched. Subscribe to a notification for watched records in order to receive an email alert when the record is modified.
Unwatch	Companies, Individuals, Sales Opportunities, Service Requests, Support Incidents	Click to stop watching a record marked for watching.
Script Chooser	Companies, Individuals,	Opens the **Choose a Script** window where you can choose and start a script.
Compose Messenger	Sales Opportunities, Service Requests, Support Incidents	Opens the **Compose Message** window through which you can send an email.

Editing Records in Navigator

Editing in the Navigator enables you to quickly edit a record through the **Detail** screen.

- You can edit only one record at a time.
- You must save or cancel your changes before moving out of a record that you are editing and before refreshing the result grid.
- You can edit the same record multiple times if desired.

Editing a Record

To edit a record

1. On the **Search Result** window, click on a record line that you want to edit.

   The **Detail** screen appears.

2. Click to edit details.
3. Edit the fields as per your preference.
4. Click .

Working with Bookmarks

While saving a Navigator query, you can mark it as a bookmark. From the Query Explorer screen, you can perform the following actions:

- Edit the name of the Navigator query.
- Save the query as a bookmark. The Navigator query can be saved as Public and Private bookmark.
  - **Public Bookmark**: is shared by the owner of the query and can be accessed by any user.
  - **Private Bookmark**: can be viewed only by the owner of the query.
- Display the query result set in the home page.
- Save the query as mobile bookmark.

Home Page Bookmarks

Home page bookmarks are displayed on the Home page when you log on to Onyx. You can create home page bookmarks for the following entities.

- Companies
- Individuals
- Sales Opportunities
- Service Requests
- Support Incidents
- Work Tickets
- Email
- Appointments
- Scripts
- Forecast
- Products
- Documents
- Sales Task

- Service Task
- Support Task

In order to save a query as a bookmark, columns must be selected in the **Search Result** grid. These columns can be changed by your administrator based on your organization's business needs. For the list of columns configured for your organization, contact your administrator.

Mobile Bookmarks

Mobile bookmarks are displayed on the **Home** page when you log on to Onyx. You can create mobile bookmarks for the following entities:

- Companies
- Individuals
- Products
- Sales, Service, and Support Incidents
- Tasks
- WorkTickets
- Forecast

In order to save a query as a mobile bookmark, certain mobile-specific columns must be selected in the **Search Result** grid. These columns can be changed by your administrator based on your organization's business needs. For a list of mobile-specific columns configured for your organization, contact your administrator.

User-specific bookmarks

If your administrator has configured user-specific bookmarks in your Onyx system, you can view these bookmarks on the Onyx Mobile Home Page. Administrators can create the following user-specific bookmarks:

- **My Incidents** - Opens a list page with all sales, support, and service incidents assigned to the logged on user.

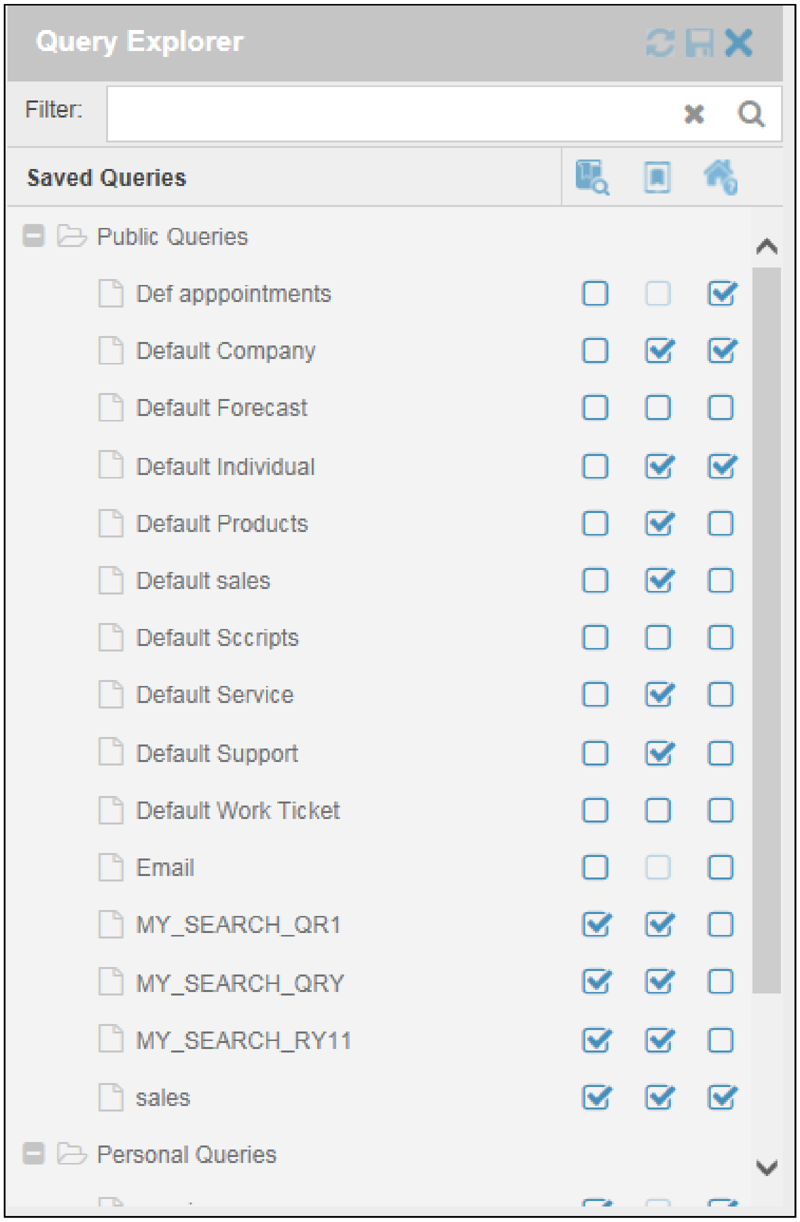
- **My Tasks** - Opens a list page with all the tasks assigned to the logged on user.

Subscribing to an existing query as a Bookmark / Mobile Bookmark / Homepage Query

To subscribe to an existing query as a Bookmark and/or Mobile Bookmark and/or Homepage Query:

1. In the Navigator Search Criteria panel, click **Open Bookmarks**.

   The **Query Explorer** window appears.



2. Select the required check boxes associated to a particular query.

Refreshing a Bookmark

To refresh bookmarks in Navigator:

1. In the Navigation bar, go to **Tools** and from the drop-down menu click **Refresh Navigator**.
2. A prompt to save changes appears. Click **OK** for all bookmarks to refresh and the page to reload.

What would you like to do?

Save a query as a mobile bookmark

Search Options

General record searching in OEP is done from a dedicated search screen with fields for entering a wide variety of search criteria. Searches can be performed to find customer records, incident information, or work tickets.

All records that match your search criteria appear in a results list in the Data Area frame.

A few other features within OEP offer their own search tools. These tools operate in a similar fashion to the main Search feature of OEP, that is, they follow the same rules regarding search delimiters and criteria selection.

You can also merge customer records through the Search feature. Merging is a process that combines similar customer records to reduce unnecessary duplication.

Available from the Navigation bar is the QUICK! Search feature. With QUICK! Search, you can hunt for a record using a single criterion.

When you have to search the system for the name of another OEP user, a dialog box exists that provides a simple search feature and also lists users according to group membership.

Important topics

- Search delimiters
- About Search
- About Quick Search
- About OEP user selection

Search Delimiters

OEP supports two delimiters that can be used to expand or limit the text criteria of a search. The '%' character acts as a wild card specifying any possible character or list of characters. The '[]' characters contain a list of possible characters to restrict the search. The delimiters can be combined, although the '%' can only be placed at either end of a search string. All searches performed in OEP act as if a '%' wild card has been appended to the search strings.

You can use these delimiters in any search field that contains standard text. The delimiters are supported in QUICK! Search, and List Manager, but not in OEP user selection.

The following table shows some example uses of the delimiters when used in search criteria.

String	Result
sm[i/y]th	Returns records that begin with 'smith' or 'smyth'
%smith	Returns records that contain 'smith' anywhere in the searched field
bl[a/o]cksm[i/y]th	Returns records that begin with 'blocksmith', 'blacksmith', 'blocksmyth', or 'blacksmyth'
[[]	Returns records that contain the '[' character
[%]	Returns records that contain the '%' character

About Search

With Search you can locate customer, incident, or work ticket records using as many or as few criteria as necessary. You can perform a search in the application at any time by entering search delimiters in the **QuickSearch** text box. The Search pane appears and contains tabs for each search target. Click a tab and the criteria fields change to reflect the target item type.

For the list of search delimiters, click [Search Delimiters](#).

At the top of the Search pane is the Search pane toolbar which includes buttons for modifying the search criteria and the search pane. They are:

Button	Function
	Executes the search.
	Clears all search criteria for the currently active tab.
	Merges two customers. Only visible when using the **Customer** tab. For additional information, see [Customer merge](#).
	Hides (contracts) the search criteria section of the pane. This is useful when you have a long list of results.
	Expands the search criteria section of the pane. This button is visible when you have previously hidden the search criteria section.

Important topics

- [Customer search](#)
- [Incident search](#)
- [Work ticket search](#)
- [Email search](#)

Customer Search

Using the **Customer** tab on the Search pane, you can perform customer searches to locate companies and individuals.

To perform a customer search:

1. Enter search delimiters in the **QuickSearch** text box and click .

   The **Search** window appears.

2. Click the **Customer** tab.
3. Specify search criteria. You can limit your search to a particular customer type by deselecting either the **Company** or **Individual** check box from the criteria list.
4. Click on the Search toolbar.

   The results of the search appeasr below the search form.

5. Click a customer in the results list to view that company or individual on the PowerPage.

If your search returns duplicate entries for a customer, you can resolve them by clicking to perform a customer merge.

When you execute the customer search, if only one record is found that matches the search criteria, OEP automatically closes Search and loads that record as the active customer on the PowerPage.

Incident Search

Using the **Incident** tab on the Search pane, you can perform incident searches to locate sales opportunities, service requests, and support incidents.

To perform an incident search:

1. Enter search delimiters in the **QuickSearch** text box and click .

   The **Search** window appears.

2. Click the **Incident** tab.
3. Specify the search criteria. You can limit the search to any one incident type by selecting that type from the **Type** list.
4. Click on the Search toolbar.

   The results of the search appear below the search form.

5. Click an incident in the results list to open that incident in the incident information window.

Warning: Use the supported search delimiters to broaden searches on the description field.

The First Name and Last Name fields are used to search the primary contact data for incidents. The Company Name field is used to search for the owner of the incident.

When you execute the incident search, if only one incident is found that matches the search criteria, OEP automatically opens the incident information window for that incident.

Work Ticket Search

Using the **Work Ticket** tab on the Search pane, you can perform work ticket searches.

To perform a work ticket search:

1. Enter search delimiters in the **QuickSearch** text box and click .

   The **Search** window appears.

2. Click the **Work Ticket** tab.
3. Specify search criteria.
4. Click on the Search toolbar.

   The results of the search appear below the search form.

5. Click a work ticket record in the results list to open that work ticket in the work ticket edit window.

Warning: Use the supported search delimiters to broaden searches on the description field.

When you type a value in the Work Ticket ID text box, all other search criteria are ignored.

When you execute the work ticket search, if only one work ticket is found that matches the search criteria, OEP automatically opens the work ticket edit window for that work ticket.

Email Search

Using the **Email** tab on the Search pane, you can perform email searches.

To perform an email search:

1. Enter search delimiters in the **QuickSearch** text box and click .

   The **Search** window appears.

2. Click the **Email** tab.
3. Specify search criteria.
4. Click on the Search toolbar.

   The results of the search appear below the search form.

5. Click an email in the results list to open that email in the email information window.

Warning: Use the supported search delimiters to broaden searches on the description field.

When you execute the email search, if only one email is found that matches the search criteria, OEP automatically opens the email information window for that incident.

Customer Merge

If you have duplicate entries for a single customer, you can merge those entries into a single customer.

To merge customers:

1. Perform a customer search to generate a results list that contains the customers to be merged.
2. Click to reveal the **Merge Customers** pane in the Data Area frame.
3. From the results list, click **Target** beside the record to be saved.
4. Click **Source** beside the record to be merged into the target record.
5. Click to merge the records or to return to the Search pane without merging the records.

   If you clicked , a confirmation dialog box appears.

6. Click **OK**.

   The PowerPage appears in the Data Area frame and displays the merged customer information that is contained within the target record.

Data values in the target record override the data in the source record. Only the data fields in the target record that do not contain information will absorb the data from the source record. All other source record information is lost (the source record is deleted after the merge completes).

All database items that are associated with the source record (such as phone, address, work ticket, email, script, and incident records) are automatically assigned to the target record.

To merge additional duplicate customers:

1. Click on the Navigation bar to return to the results list.
2. Click to return to the **Merge Customers** pane.

3. Follow steps 3 through 6, above.

Send questions, comments, suggestions about documentation to
Documentation@aptean.com

About Quick Search

With Quick Search you can locate company, individual, incident, or work ticket records by specifying a single search criterion. You can use Quick Search at any time from the Navigation bar.

To use Quick Search

1. Click ◂ on the Quick tools area above the Navigation bar to display the list of criteria options.
2. Point to **Quick Search** and select an item to use as your search criteria.

   The new criterion appears above the criteria text box.

3. Type the search information in the criteria text box below the search criteria and click 🔍 beside the box (or press return).

If more than one record matches the search criterion, the results list appears in the Data Area frame. If only one record is found that matches the search criterion, OEP automatically loads that record into the appropriate window.

About OEP User Selection

The select user dialog box appears when you need to save the name of an OEP user as part of another OEP entity (for example, to appoint a user to monitor an incident) or when you need to include an OEP user as a search criterion. From the dialog box you can search by a user's full name or review lists of user names arranged in group hierarchies.

The dialog box has two tabs. **User Search** provides for user searches by user name, user ID, or any part of either, while **User Tree** lists users by group. When the dialog box loads, it automatically performs a search based on the contents of the text box with which it is associated. User names that cannot be found are listed first, as the dialog box gives you a chance to search again for the correct name(s).

To search for a user by name:

1. If necessary, click the **User Search tab to reveal the Search For** text box.
2. Type search criteria in the box and click .
3. If the appropriate user name appears in the result list, click it to select the user and close the dialog box. Otherwise, repeat step 2 to perform the search again.

Within the user tree, groups are represented with the icon, and individual users are represented by the icon.

To select a user from the user tree:

1. Click the **User Tree** tab to reveal the user list hierarchy.
2. Click a group name to expand its list of users or subgroups.
3. Click a user name to select it.

    The dialog box closes and the user name appears in the text box in the previous window.

Onyx Insight

The **Onyx Insight** is a phrase-based search engine. Based on the text you type in the search box, the search engine retrieves the most relevant results and displays on the screen.

The search can be performed on Company, Individual, Sales, Service and support incidents as well as tasks along with work ticket and email message.

Performing a Search

You can perform a search on Onyx Insight using:

- Quick Search text box from Header bar
- Navigator

To perform a search through Quick Search text box from Header bar

1. Log on to **Onyx**.
2. On the Header bar, click ◄, and then select **InsightSearch**.
3. Type the keywords you want to search for, in the InsightSearch box and click .

Note: When you start a search on Onyx Insight, you can select a search prediction as you type in the text box. Search predictions are the possible search terms that you are intending to type or search for.

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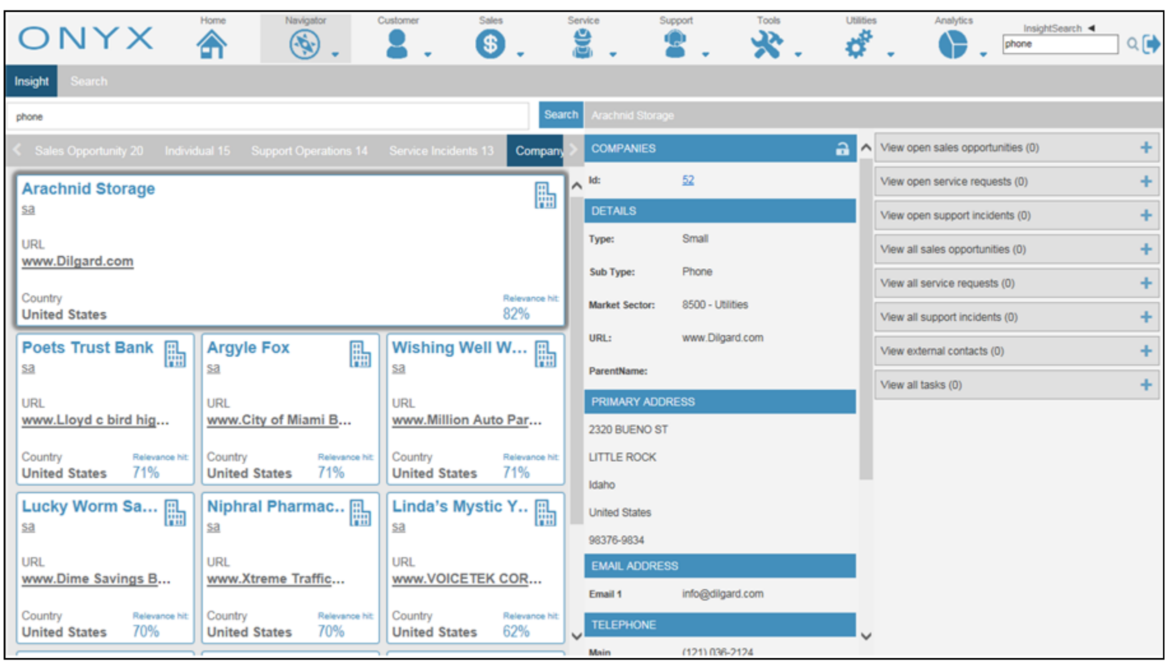
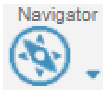
4. The search results screen appears as shown in the following image.



To perform a search through Navigator

1. Log on to **Onyx**.
2. Click 

, and then select **Insight**.
3. Type the keywords you want to search for, in the InsightSearch box and click **Search**.

Note: When you start a search on Onyx Insight, you can select a search prediction as you type in the text box. Search predictions are the possible search terms that you are intending to type or search for.

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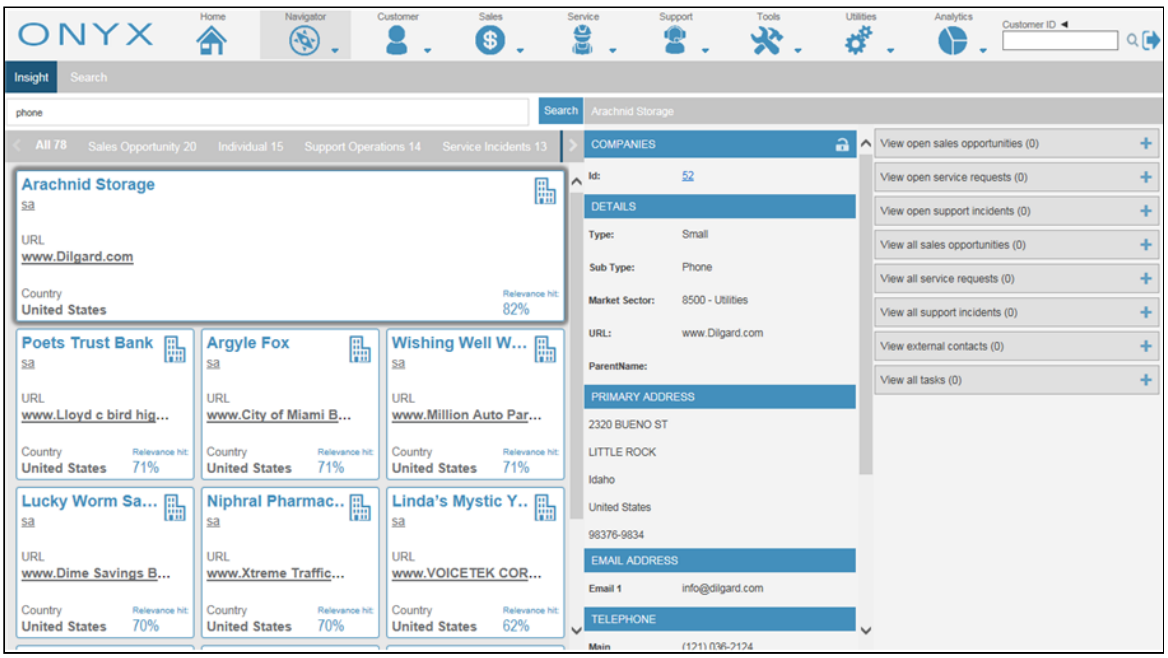
4. The search results screen appears as shown in the following image.

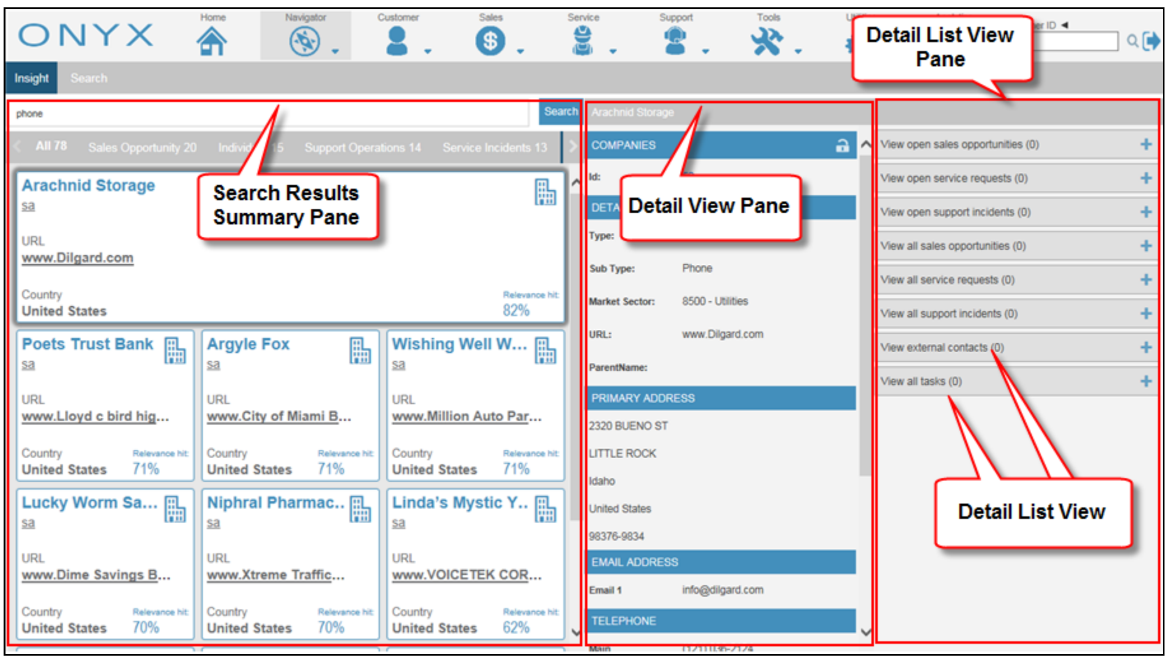


Search Results

When you perform a search, the results that match your search criteria are listed in the search results window.

The search results screen consists of:

- Search Results Summary Pane
- Detail View Pane
- Detail List View Pane



Search Results Summary Pane

The Search Result Summary pane displays the list of results that match your search query. It categorizes the results on the tab bar based on the entity type. These tabs are arranged in descending order of the number of results found for the search query.

Detail View Pane

The Detail View pane displays the primary details of the record selected on the Search Result Summary pane.

Detail List View Pane

The Detail List View pane displays more information of the selected result, like all the tasks for a customer, open incidents etc.

Managing Surveys

The Surveys screen lists the surveys for the active customer in the top half of the Data Area frame. Click a survey in the list to view the questions and the customer's responses in the bottom half of the frame.

Answers to survey questions are collected in the **Add/Edit Survey** window.

To add a new survey, click and select a survey from the available list. The icons represent the survey groups, and the icons represent the surveys. Click a group name to expand its contents. Locate a survey and then click it by name to open the edit **Add/Edit Survey** window.

To edit a survey, double-click one in the list, or select one and then click . Survey questions can be edited at any time, as long as the OEP system administrator has not deactivated the survey.

See [Completing a survey]() for more information about using the **Add/Edit Survey** window.

To delete a survey, click one in the list to select it and then click .

Completing a Survey

The **Add/Edit Survey** window contains a survey's questions and the available set of customer responses. Questions appear on the left and the answers on the right. Select or type the customer's response to each survey question. It is not necessary to enter answers for all questions before saving a survey.

Click  to save the survey information and close the window.

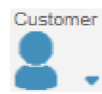
Click  to clear the answers to the survey.

Click  to delete the survey from the customer list.

About PowerPage

The PowerPage is the primary place for reviewing customer information. It displays information about the active customer until a different customer is selected either through a search or by a link from another part of OEP.

Located in the Data Area frame, the PowerPage is divided into two halves. The top half contains tabs that display customer demographic and contact information, and the bottom half contains tabs that display information about customer interactions.

The PowerPage is accessible at any time by clicking 

on the Navigation bar. It can also be viewed by clicking **Power Page** within the Customer submenu on the Navigation bar.

PowerPage tabs

The top half of the PowerPage includes the following tabs:

Tab	Function
Details	The **Details** tab contains customer demographics and includes clickable hyperlinks for customer email addresses and for opening a linked company or the primary contact for the customer. For details on adding or editing the customer's demographic details, see Managing customer information.
External Contacts	The **External Contacts** tab contains the customer's external contact information and the **Internal Contacts** tab contains the customer's internal contact information. For information on managing a customer's external and internal contacts, see Managing contacts.
Internal Contacts	

Tab	Function
Organization Chart	The **Organization Chart** tab reveals the customer's organizational relationships, including relationships between companies, individuals, and contacts. For additional details, see Viewing the organization chart.
Social Media	The Social Media tab enables you to include links to various social media sites, such as FaceBook and Twitter. For information about including a social media link, see Managing Social Media.

The bottom half of the PowerPage includes the following customer interaction tabs:

Tab	Function
History	The **History** tab displays a chronological list of past customer interactions for all incidents, tasks, surveys, products, literature orders, work tickets, comments, campaigns, and attachments that are associated with the active customer. Viewing customer history information describes how you can manage recent customer interactions from this tab.
Comments	The **Comments** tab lists the comments associated with the active customer.
Email	The **Email** tab lists the emails associated with the active customer.
Sales Service Support	The **Sales**, **Service**, and **Support** tabs list the customer's sales opportunities, service requests, and support incidents, respectively. For additional information regarding these customer interactions, see About Incidents.
Task	The **Task** tab lists the tasks associated with the customer.
Scripts	The **Scripts** tab lists the scripts associated with the customer.

Tab	Function
Appointments	The **Appointments** tab displays calendar information for the active company or individual. You can view appointments created in Outlook by day, week, or month. You can schedule or modify appointments and associate them with additional customers and incidents. Viewing Calendar information is an introduction to the calendaring features available.
Products	The **Products** tab displays list of products associated with the customer.

PowerPage toolbars

The PowerPage displays two toolbars, one for the top half of the PowerPage and one for the bottom half of the PowerPage. Other than the expand and contract buttons, the buttons available on these toolbars depend on the tab you have selected and are explained in the sections of this Help system that discuss that tab.

The expand and contract buttons, and , respectively, are located on the bottom PowerPage toolbar. Use these buttons to expand and contract (hide) the two halves of the window as follows:

- From the PowerPage baseline view, click to contract the top half of the PowerPage (click to expand the top half of the PowerPage and restore it to its baseline view).
- From the PowerPage baseline view, click to contract the bottom half of the PowerPage (click to expand the bottom half of the PowerPage and restore it to its baseline view).

Managing Customer Information

Customer data is managed through a separate edit window when you need to edit an existing customer or add a new customer. The title of the window indicates the action being performed (add or edit) and the type of customer (company or individual). This window contains contact and demographic information for the customer. In addition to the standard telephone and address information, there are fields for indicating the customer's active status and for classifying them through predefined customer categories. The exact assortment of data fields will be specific to the needs of your organization and can vary between the windows used for companies and individuals.

Customer Actions

You can perform various actions on a record by using the following buttons available on the **Details** tab toolbar of the PowerPage:

Button	Function
	Clones a customer to create a new, nearly identical customer.
	Prints the active customer. OEP formats the customer data into a printer-friendly format in a new window. Use the browser's **File** menu to print the record data.
	Emails customer information as an email attachment. This uses the email application on your computer. It is not integrated with the OEP email feature.
	Refreshes the **Details** tab for the active customer.
and	Watch button enables you to watch a customer record and unwatch discards the watch setting. When a record is being watched, the administrator gets an e-mail notification when the record is modified.

Adding or editing a Customer Record

From the **Details** tab toolbar on the PowerPage:

- Click to edit an existing customer. The customer's information appears in a customer edit window.
- Click to add a new customer. A dialog box appears asking if the new customer is to be a company or individual. Select one, and click OK to continue. A blank customer form appears in a customer edit window.

You can also add customer records using the Navigation bar. Click **Company** or **Individual** under the **Add New** menu. A blank customer information window appears.

When you open a new customer record or an existing record in the edit mode, the buttons are available to you:

Button	Function
	Enables you to validate a given primary address and alternate address. depicts that an address is validated and depicts that an address is not validated. For more information about address validation, see Validating Addresses
	Enables you to validate an e-mail address. depicts that an e-mail has been validated and depicts that an e-mail is not validated.
	Enables you attach an alert to customers and incidents. For more information about setting alerts, see Using alerts.
	Enables you to clear the information that is specified in the form, for a new record
	Deletes an existing customer
	Attaches an existing customer record to a new Messenger message

Button	Function
	Enables you to manage an alternate address. For more information about alternate address, see Managing alternate addresses.
	Enables you to link a customer record. For more information, see Linking customer records.

When you are finished making changes to the customer record, click to save your changes.

Managing Alternate Addresses

While each customer has a primary address for contact purposes, customers can have more than one address. These addresses can be used for any purpose.

You can create and manage alternate customer addresses through the **Other Addresses** window. To view all of the addresses for a customer, click below the primary address in the edit window (Note: this button is not visible until the customer has been saved).

The customer's address information appears in a table at the top of the Other Addresses window. A checked box in the **Primary** column indicates the customer's primary address. Any other listed addresses are alternate addresses.

Below the table, in the **Address Detail** pane, is the **Type** list that contains the complete list of address types. To edit or add an alternate address, select a type from the list and the address information appears in the text boxes in the bottom half of the window.

Validate the address by clicking .

Update the information as needed and click to save the address data.

To remove an address type from the list, select the address type and click . The address information for that type disappears from the list and is no longer associated with the customer.

Note: The address that is marked as primary cannot be edited or deleted from the Other Addresses window. Use the customer edit window to change the primary address.

Using Alerts

Alerts are text messages that you can attach to customers and incidents to inform other OEP users about important issues regarding them. The text of an alert pops up each and every time the customer or incident is accessed in the PowerPage or opened from a search list. You might use an alert to note contract expiration dates or changes in critical customer information, or to highlight support issues.

Alerts can be set to expire after a certain date, or they can be configured to last indefinitely. Only one alert can be set on a customer or incident at a time. To provide additional, yet less critical information about a customer, you can create comments. There is no limit to the number of comments you can associate with a customer. For additional information see About Comments.

To set an alert for a record:

1. From the edit window, click .

    The **Set Alert** window appears.

2. Type the message you want to appear in the alert.
3. To check the spelling of the message text, click . See Using the spelling checker for more information about using the spelling checker.
4. To set an expiration date for the alert message, select **Expires** check box and select the date on which you want the message to expires.
5. Click to save the alert and close the window.

To delete an alert from a record:

1. From the edit window, click .

The **Set Alert** window appears.

2. Click to delete the alert and close the window.

Linking Customers

Customer can be linked to indicate important associations. Each company can have a primary contact, and individuals can be linked to companies to designate them as employees.

Primary contacts

Each company can have a single primary contact. This person is highlighted on the PowerPage as the principal human link between the company and your organization.

To assign a primary contact to a company:

1. From a company edit window, click beside the **First Name** field on the **Primary Contact** area.

   The **Search for a Primary Contact** window appears.

2. Enter criteria and click to start the search.

   The list of individuals that match the search criteria appears in the bottom half of the window.

3. Click an individual in the results list to select the primary contact.

   The search window closes and the individual's name appears on the company form.

In the **Primary Contact** fields of an **Edit Company** window, OEP populates the data from the source individual. You can only change the individual's information by editing the individual record. You cannot edit the individual from an **Edit Company** window.

OEP provides a link to the individual that represents the primary contact. Click the contact's name to view that individual in the PowerPage.

See Managing contacts for information on adding other types of contacts to a customer record.

Standard links

Individuals can be linked to companies to show them as employees, and companies can be linked to other companies to indicate ownership.

To link an individual to a company:

1. From an individual edit window, click next to the **Company** box.

   The **Search for a Company** window appears.

2. Enter criteria, and click to start the search.

   The list of companies that match the search criteria appears in the bottom half of the window.

3. Click a company in the results list to select the linked company.

   The search window closes and the company name appears on the individual's form.

To select a company as a parent company:

1. From a company edit window, click next to the **Parent** box.

   The **Search for a Company** window appears.

2. Enter criteria, and click to start the search.

   The list of companies that match the search criteria appears in the bottom half of the window.

3. Click a company in the results list to select a parent company.

   The search window closes and the parent company name appears on the edited company's form.

Remarks

Within both the **Search for a Primary Contact** window and the **Search for a Company** window, you can:

- Click  to clear the search criteria.
- Click  to hide (contract) the search criteria pane, which is useful when your search returns a long list of results.
- Click  to expand search criteria pane that you previously contracted.

When you execute the individual or company search, if only one record is found that matches the search criteria, OEP automatically closes the search window and inserts that record as the linked individual or company.

A link of any type between two customers can be removed by clicking . The name of the linked individual or company disappears from the customer record.

Deleting Customers

Customers can be deleted from the edit window. When you delete a customer, all associated incidents, campaigns, surveys, literature orders, and products are also deleted.

To delete a customer, open the appropriate edit window. Click to delete the customer and it's associated data.

Validating Addresses

You can validate a primary and alternate address of a customer, by using the address validation feature. You can validate an address only if it is configured by the System Administrator.

> ! **Important:** Address validation can be performed only for Unites States of America and Canada based addresses.

To validate an address

1. Open a new record or an existing record in edit mode.
2. Specify full address or a part of the address, and click .
3. When an address that you specified is not completely resolved, the **Suggested Address List** window is displayed. This window lists all the addresses that match to the partial address that you specified. Some of the suggestions could be ranges of values. For example, in the following image the last three items depict ranges.

> **Note:** You can click a non-range item to select. You cannot click an item that depicts a range of items.

4. Select a record or type a range value in the box provided. For example, if the missing apartment number is `1C`, specify the same in the box and click **Confirm**,

The address is validated.

Viewing Customer History Information

To view the history information for the active customer, select the **History** tab on the bottom half of the PowerPage. The History screen in the Data Area frame lists the most recently updated interactions that are associated with the active customer. History lists appear on both the PowerPage and the incident information window.

For more information on viewing and sorting the records within the history list, see Using results lists.

Managing customer history information

The customer history provides a chronological list of past events for all incidents, tasks, surveys, products, literature orders, work tickets, comments, campaigns,scripts, and attachments that are associated with the active customer.

To view an interaction included in the customer's history, click a row in the history list. The edit window for that particular interaction appears and you can use this window to view or update the interaction information. Click  to save your changes.

Viewing Organization Chart

A customer's organization chart illustrates relationships between companies, individuals, and contacts. The image represents a company, represents a group of individuals (such as internal contacts), and represents an individual.

To access a customer's organization chart, click the **Organization Chart** tab on the customer's PowerPage. Initially the organization chart expands, if necessary, to reveal the current company or, if the current customer is an individual, to reveal the individual's company. Also, the top node on the chart is expanded when the chart initially displays. Otherwise, all other nodes are collapsed.

When companies have a parent company, the organization chart contains a node for each company under the parent. Company nodes on the chart can include subnodes for individuals, internal contacts, external contacts, and companies. Click to expand a node, and click to collapse a node.

Clicking a company or individual name in the organization chart displays customer details to the right of the chart. Some of the details are clickable hyperlinks, which are described in the following table.

Hyperlink	Displays
ID	Customer's PowerPage
Name	Primary contact's PowerPage
Company	Individual's company PowerPage
Parent	Parent company's PowerPage
Email	Email compose form
URL	Customer's Web page

Managing Contacts

Since a customer record can have multiple internal and external contacts, the function of the contacts can be identified through the use of contact types. These types are selected by your organization and usually indicate the specific function of the contact. For example, types might include: Finance, Account Owner, or Legal Representative. For more general information about contacts, see About Contacts.

On the PowerPage there are tabs for external and internal contacts. Click a tab to view either the internal or external contacts. Click the **Details** tab to return to the customer demographic information.

Adding an external contact

To add an external contact:

1. From the **External Contacts** tab, click .

   The **Search for a Contact** window appears.

2. Enter criteria and click to execute the search.
3. Check the box next to each name in the results list that you want to add as an external contact.
4. Select a type for the contacts from the **Contact Type** list.
5. Click to save the contacts and to close the search window.

Remarks

From the **External Contacts** tab, you can:

- Click to refresh the information on the tab.
- Click to delete one or more contacts associated with the customer, after checking the box in the appropriate row for the contacts you want to delete.

From the **Search for a Contact** window, you can:

- Click to create a new customer record. A blank customer edit window appears. Enter data for the customer and click to save it. The customer record is saved and added to the list of contacts.
- Click to clear the search criteria.
- Click to hide (contract) the search criteria pane, which is useful when your search returns a long list of results.
- Click to expand search criteria pane that you previously contracted.

Adding an internal contact

To add an internal contact:

1. From the **Internal Contacts** tab, click .

   The **Add Contact** dialog box appears.

2. Click a user name to select it. The user name appears in the box above the list. Continue selecting users by clicking their names. Groups are represented by the icon, and individual users are represented by the icon. Click the icon to view the users of that group. Double click the group name to add all users in that group as contacts. Re-clicking on a user name or double re-clicking on a group name deselects the user or users as contacts.

   OR

3. Type one or more user names in the text box; use semi-colons to separate the names. Press CTRL-K to resolve the names from the user tree.
4. Select a type for the contacts from the **Contact Type** list.
5. When you have selected the appropriate names, click to save the contacts and to close the dialog box.

Note: Company records also have a special external contact known as a primary contact. See Linking

customer records for information on managing primary contacts.

Remarks

From the **Internal Contacts** tab, you can:

- Click  to refresh the information on the tab.
- Click  to delete one or more contacts associated with the customer, after checking the box in the appropriate row for the contacts you want to delete.

From the **Add Contact** dialogue box, you can:

- Click  to save the current OEP user account as an internal contact. Use this button to quickly mark yourself as a contact for the customer.

Managing Social Media

The **Social Media** tab can be used to add various social media links to a Company or Individual records.

To add social media links

1. Click .
2. In the **Social Media Configuration** window, type a **Caption**.
3. Select the social media from the **Social Media Type** drop-down list.
4. Enter the link to the site in the **Identifier** field.
5. To add more rows, click and to remove rows click .
6. Click .

The social media is added.

Emailing Customer and Incident Records

Customer and incident summary information can be added to emails as HTML attachments. Recipients can then view the information without having to access OEP.

To email a customer or incident record:

1. From the PowerPage **Details** tab, click to open a new browser window that contains the active customer's summary information.

   OR

1. From the incident information window, click to open a new browser window that contains the active record's summary information.
2. From the File menu, select **Send** and then **Page by E-mail**.

   A blank email message appears with the customer or incident information attached in an HTML file. Complete the email as needed and send to the recipient.

Note: This function is not integrated with the OEP Email feature.

Linking Work Tickets

Work tickets can be linked to customer records to aid in the tracking of customer issues. To view the list of work tickets linked to the active customer, click **Work Tickets** in the **Customers** submenu of the Navigation Bar. The list of linked work tickets appears in the Data Area frame.

The list includes those work tickets that are linked to this customer both directly and through an incident. All work tickets that are linked to the incidents assigned to the customer appear in this list. The Link Type column identifies how the work ticket is linked to the customer.

Click a row in the list to view the complete information for the work ticket record. The editable data appears in a separate window.

You can click at any time to refresh the list of linked work tickets.

To create a new work ticket that will be linked to the customer record:

1. Click . A blank work ticket edit form appears in a new window. See Adding and editing work tickets for more information on creating a work ticket. Once you save the work ticket, it is automatically linked to the customer.

To link an existing work ticket to the customer record:

1. Click . A search form appears.
2. Enter criteria in the fields and click . The results of the search appear below the search criteria. Each record in the list has a check box next to the work ticket ID.
3. Check the box for each work ticket to be linked to the customer.
4. Click to save your changes.

To remove the link between a customer record and a work ticket:

1. Check the box next to the work ticket ID for each work ticket to unlink.
2. Click . The work tickets are unlinked from the customer record.

Note: Only work tickets that are linked to the customer record directly can be unlinked in this manner. A work ticket that is linked to a customer through an incident cannot be unlinked from this screen. Edit the incident to unlink the work ticket.

To delete one or more linked work tickets from the system:

1. Check the box next to the work ticket ID for each work ticket to delete.
2. Click . The work tickets are deleted from the system.

Related topic

About Work Tickets

Cloning Customers

Customers can be cloned to create new, nearly identical customers. This feature is most often used to create associated customers without having to spend the time copying important data from one customer to another.

The new customer does not have to be the same type as the source customer. You can clone an individual to create company and clone a company to create an individual. If you do clone a customer to another customer type, you have the option to link the individual record to the company record automatically.

Click  at the top of the power page to clone the current customer record. A dialog box appears asking if you want to clone the customer to a company or individual record. If the new record is not the same type as the source record, check **Create Links** to link the individual record to the company record.

Click **OK** to open the edit customer window. The fields in the window are automatically populated with the information from the source record. Complete or correct the information as necessary and click  to save the new record.

Only the data that has been saved to the database is copied from the source customer record to the cloned customer. Save any changes to the source record before clicking the clone button.

Attached Documents

Document files can be attached to customer records. Click **Attachments** on the Navigation bar to view the list of document files that are attached to the active customer record. Click to refresh the contents of the list.

Viewing attachments

Attachments are downloaded through the browser. Graphic files that a browser recognizes (such as .JPG or .GIF files) can be viewed in the browser directly. Other files can be downloaded and saved to be opened by the appropriate application.

To view an attachment, click the appropriate row in the list to load the **Details** window. To download the attachment, click the filename link identified as the current file. If necessary, follow the on-screen instructions for saving the file to your computer. If the browser has problems displaying an attachment, try right-clicking the filename link and selecting **Save Target As** from the pop-up menu to save the file directly to your hard disk.

> **Important:** Viewing attachments that were uploaded using OEP - Windows Client (formerly known as Onyx Customer Center) launches a small application that can retrieve the file. See Using the OLE Attachment Viewer for more information.

Uploading an attachment

Attachment files are uploaded directly through the Web browser.

To upload an attachment:

1. Click .

   The **Details** window appears.

2. Enter information about the attachment in the fields of the window.
3. Click the **Browse** button to open the **Choose File** dialog box.

4. Navigate to the location of the file to upload. Click **Open** to select the file.
5. Click to close the window and start the upload.

Note: There may be limitations regarding the size of the files you are allowed to upload. Contact your OEP system administrator if you have problems uploading files.

Updating an attachment

To update the details of an attachment, click the appropriate row in the list of attached files. In the **Details** window update the necessary information. You can update or change the file if necessary. When you are finished updating, click to save your changes.

To clone the attachment information, click . Doing so creates a new Details window with the same information as the source attachment, but without the file information. Click **Browse** to locate a new file. Click to upload the new attachment to OEP.

Deleting attachments

To remove one or more attachments from the customer record, check the box next to the title of the attachment(s) to remove. Click to delete the attachment(s) from the list.

Viewing Literature Order Information

Click **Literature** within the Customer submenu on the Navigation bar to view the literature orders for the active customer record. The list of literature orders for the customer appears in the Data Area frame. From here you can add and remove orders in the list, as well as access existing orders to edit or view the details of the order.

Managing literature information

The literature order information window appears any time you edit an existing order or add a new order to the list. For more information about this window, see Managing literature orders.

To edit an existing literature order, click a row in the list.

To add a new literature order, click .

Deleting literature orders

To delete one or more literature orders, check the box in the far left column of each order you want to delete. Click to remove the orders from the list.

Managing Literature Orders

Literature data can be edited through the literature order information window. This window contains information that:

- Identifies the literature products ordered by or for the customer
- Shows the distribution methods for the literature products (including delivery information such as fax numbers and street addresses)
- Identifies a code used to track the literature order against a campaign
- Indicates when the literature order was added to the system

The literature order information window is divided into two halves. The top half contains the order information and the bottom half lists the literature products that comprise the order. There are tabs on the top half that display information regarding the order's main details, email and fax messages, and attached documents.

The default tab for a literature order is the **Main** tab. This tab contains information regarding shipping and processing information for the order. You can select one of the addresses the customer has on file, or you can type a new one in the **Ship To** box. If the literature order contains a fax document, you can type a telephone number in the **Fax** box. If you do not supply a number, OEP will use the fax number stored in the customer record.

You can also specify a processing priority for the order. There are buttons for **Batch** and **Immediate** processing. Contact your OEP system administrator for information on the frequency of which literature orders are processed based on their priority setting.

You can also specify a processing priority for the order. There are buttons for **Standard** and **High** processing. Contact your OEP system administrator for information on the frequency of which literature orders are processed based on their priority setting.

Edit the order information by typing in the text boxes and selecting items from the drop-down lists. In addition to the editable text boxes, the literature order information window has four other important functions. They are:

- Literature product selection
- Tracking code selection
- Message management
- Attached documents

When you are finished working with the literature order, click to save your changes.

To delete the order from the system, click .

Click when you are creating a new literature order to clear any information in the text boxes.

Selecting Literature Products

The **Add Literature Product** dialog box contains the complete list of orderable literature products. Literature products in the dialog box are arranged in group hierarchies. To view the **Add Literature Product** dialog box, click in the bottom half of the literature product information window.

To select a literature product:

1. Click to expand a group and review its contents.
2. Locate a product, and click to select it.
3. Select a value from the **Literature Type** list.
4. If necessary, type a value in the **Quantity** box.
5. Click to add the literature product to the order. Repeat steps 1 through 4 to select more items.

   OR

5. Click to add the literature product to the order and close the window.

Once added to the list of literature items for the order, a literature product can be deleted until it has been processed. Unprocessed items in the list have a check box in the far left column of the list. To delete one or more items, check the box for each item to delete and click to remove the items from the order list.

Selecting Tracking Codes

Tracking codes are identification codes for a specific event or activity (such as a specific mailing, seminar, or advertisement) that is part of a campaign. Tracking codes enable you to track the effectiveness of a campaign.

To select a tracking code, go to **Campaigns** tab and click **Add this customer to a new campaign**. The Select Tracking Code dialog box appears, containing the complete list of tracking codes within the system. Codes in the dialog box are arranged in group hierarchies.

To select a tracking code:

1. Click to select a campaign, and to expand the groups and review their contents.
2. Locate a code (identified by) and click to select it.

   The dialog box closes and the code is assigned to the product.

Managing Messages

Literature products distributed via email or fax can have a message attached to them that is included when the product is sent to the customer. These messages can be generated as needed or selected from a library list. To compose a message, click the **Message** tab.

Composing a message

Type a subject for the message in the **Message Subject** box. Type the message contents into the **Message Body** box. Type a source email address into the **Email from** box.

Click to spell check the message. See Using the spelling checker for more information about using the spell checker.

Click to clear all the information from the **Message** tab.

Working with saved messages

You can save commonly used messages and retrieve them as needed. Saved messages can be shared among all OEP users, or kept private for your own needs.

To use a saved message, click next to the **Message Subject** box. The list of the available messages appears. Click one in the list to populate the message boxes with the contents of the saved message.

To save a message:

1. Compose a message.
2. Click .

   The **Message Management** dialog box appears.

3. Type a description for the message in the **Message Description** box.

4. To make the message available to all OEP users, check **Save in Public List**.
5. Click  to save your changes.
6. Click OK to close the window.

To delete a saved message:

1. Click .

   The **Message Management** dialog box appears.

2. Click a message in the Existing Messages list.
3. Click  to delete the message.
4. Click  to save your changes.
5. If necessary, repeat steps 2 through 4 to continue removing messages.
6. Click OK to close the window.

Attached Documents

Document files can be attached to literature order records. Click the **Attachments** tab to view the list of document files that are attached to the current order. Click to refresh the contents of the list.

Viewing attachments

Attachments are downloaded through the browser. Graphic files that a browser recognizes (such as .JPG or .GIF files) can be viewed in the browser directly. Other files can be downloaded and saved to be opened by the appropriate application.

To view an attachment, click the appropriate row in the list to load the **Details** window. To download the attachment, click the filename link identified as the current file. If necessary, follow the on-screen instructions for saving the file to your computer. If the browser has problems displaying an attachment, try right-clicking the filename link and selecting **Save Target As** from the pop-up menu to save the file directly to your hard disk.

> ! **Important:** Viewing attachments that were uploaded using OEP - Windows Client (formerly known as Onyx Customer Center) launches a small application that can retrieve the file. See Using the OLE Attachment Viewer for more information.

Uploading an attachment

Attachment files are uploaded directly through the Web browser.

> ! **Important:** You cannot attach files to email messages generated as part of a literature order. Files that are attached to literature order records are for internal use only and not included as part of the order.

To upload an attachment:

1. Click .

The **Details** window appears.

2. Enter information about the attachment in the fields of the window.
3. Click the **Browse** button to open the **Choose File** dialog box.
4. Navigate to the location of the file to upload and click **Open** to select the file.
5. Click to close the window and start the upload.

Note: There may be limitations regarding the size of the files you are allowed to upload. Contact your OEP system administrator if you have problems uploading files.

Updating an attachment

To update the details of an attachment, click the appropriate row in the list of attached files. In the **Details** window update the necessary information. You can update or change the file if necessary. When you are finished updating, click to save your changes.

To clone the attachment information, click . Doing so creates a new Details window with the same information as the source attachment, but without the file information. Click **Browse** to locate a new file. Click to upload the new attachment to OEP.

Deleting attachments

To remove one or more attachments from the literature order, check the box next to the title of the attachment(s) to remove. Click to delete the attachment(s) from the list.

Viewing Product Information

Click the **Products** tab within the Customer Power Page to view the products for the active customer record. The list of products for the customer appears in the tab. From here, you view and edit current product information, as well as add and remove products in the list.

To select a product, click a row in the list. When the product is selected, the line items associated with the product appear in the lower half of the frame.

Managing product information

The product information window appears any time you edit an existing product or add a new product to the list. For more information about this window, see Managing product information.

To edit an existing product, double-click a row in the list or select a row and click .

To add a new product, click .

Deleting products

To delete a product, select a row in the list and click .

Managing Product Information

Customer product data can be edited through the product information window. This window contains information that:

- Identifies the product by name and serial number
- Indicates the amount ordered by the customer
- Identifies the individual to contact regarding the product
- Identifies a code used to track the product against a campaign
- Indicates when the product order was added to the system

By default, the window is divided into two halves. The top half contains the primary product information, and the bottom half lists the product line items and linked documents.

Edit the product information by typing in the text boxes and selecting items from the drop-down lists. In addition to the editable text boxes, the product information window has five other important functions:

- Product selection
- Contact selection
- Tracking code selection
- Line item editing
- Attached documents

When adding a new product, you can clear the information you've entered by clicking . This button is not visible when you are making changes to product information that has already been saved.

To assign the active product to a different customer record, click IMG. Use the Customer search window to select a new owner for the product record.

When you are finished working with the product record, click to save your changes. Click to delete the product record.

Use the and buttons to expand and contract (hide) the two halves of the window as follows:

- From the window's baseline state, click to contract the primary product information (click to expand the primary product information and restore the window's baseline state).
- From the window's baseline state, click to contract the product line items (click to expand the product line items and restore the window's baseline state).

Selecting Products

The Selected Product dialog box contains the complete list of products that can be ordered by customers. Products in the dialog box are arranged in group hierarchies. To view the Selected Product dialog box, click next to the Product Number box in the product information window.

To select a product:

1. Click to expand a product group and review its contents.
2. Locate a product and click to select it.
3. Click to save your changes and close the dialog box.

Selecting Contacts

Each customer product can be assigned a contact. Any individual record in the database can be assigned as a contact for a product.

To select a contact for a product:

1. Click next to the Contact field in the product information window.

   The **Search for a Primary Contact** window appears.

2. Enter criteria into the form and click to execute the search.

   If the search returns more than one individual, a list appears in the bottom half of the window.

3. Click an individual record in the results list to mark the person as a contact for the product.

   The window automatically closes and the individual's name appears in the Contact field in the product information window.

Note: If the search returns only one individual record, the search window closes and the person is automatically assigned as contact for the product.

Remarks

A contact can be removed from the product by clicking . The field clears and the contact information is no longer linked.

Within the **Search for a Primary Contact** window, you can:

- Click to clear the search criteria.
- Click to hide (contract) the search criteria pane, which is useful when your search returns a long list of results.

- Click  to expand search criteria pane that you previously contracted.

Editing Line Items

Product records can have one or more line items that provide additional information about the product and its relationship with the customer. Information about any line items associated with the products in your system is available from your system administrator.

When product line items are available in your system, you can view a list of the line items for a product by clicking the **Line Items** tab in the product information window. You can edit an existing line item by clicking on that item in the list, or you can create a new line item by clicking . The product line information window opens and you can update the information as needed. The information is saved along with the rest of the product data when you click to close the window.

Attached Documents

Document files can be attached to product records. Click the **Attachments** tab to view the list of document files that are attached to the current product. Click to refresh the contents of the list.

Viewing attachments

Attachments are downloaded through the browser. Graphic files that a browser recognizes (such as .JPG or .GIF files) can be viewed in the browser directly. Other files can be downloaded and saved to be opened by the appropriate application.

To view an attachment, click the appropriate row in the list to load the **Details** window. To download the attachment, click the filename link identified as the current file. If necessary, follow the on-screen instructions for saving the file to your computer. If the browser has problems displaying an attachment, try right-clicking the filename link and selecting **Save Target As** from the pop-up menu to save the file directly to your hard disk.

> **Important:** Viewing attachments that were uploaded using OEP - Windows Client (formerly known as Onyx Customer Center) launches a small application that can retrieve the file. See Using the OLE Attachment Viewer for more information.

Uploading an attachment

Attachment files are uploaded directly through the Web browser.

To upload an attachment:

1. Click .

   The **Details** window appears.

2. Enter information about the attachment in the fields of the window.
3. Click the **Browse** button to open the **Choose File** dialog box.

4. Navigate to the location of the file to upload. Click **Open** to select the file.
5. Click to close the window and start the upload.

Note: There may be limitations regarding the size of the files you are allowed to upload. Contact your OEP system administrator if you have problems uploading files.

Updating an attachment

To update the details of an attachment, click the appropriate row in the list of attached files. In the **Details** window update the necessary information. You can update or change the file if necessary. When you are finished updating, click to save your changes.

To clone the attachment information, click . Doing so creates a new Details window with the same information as the source attachment, but without the file information. Click **Browse** to locate a new file. Click to upload the new attachment to OEP.

Deleting attachments

To remove one or more attachments from the product, check the box next to the title of the attachment(s) to remove. Click to delete the attachment(s) from the list.

Managing Campaigns

The Campaigns screen in the Data Area frame lists the campaigns associated with the active customer record. Click a row in the campaign list to select a campaign. The associated milestones appear in the bottom half of the screen.

To sort a list by any of its fields, click the appropriate column heading. To reverse sort the list by the same field, click the column heading a second time.

Information about individual campaigns is available from the **Campaign Detail** window. This window appears any time you create or edit the contents of a campaign record. Use this window to select a tracking code and milestones to associate with a customer. For more information about these items, see Tracking codes and milestones.

Adding a campaign

To add a campaign, click . The Campaign Detail window appears. Complete the information in the window, as described in Tracking codes and milestones, and click to save the campaign.

Editing a campaign

To edit an existing campaign, double-click a row in the list or select a row and click . Update the information in the Campaign Detail window, as described in Tracking codes and milestones, and click to save your changes.

Deleting a campaign

To delete one or more campaigns from the list, check the box(es) in the far left column of the campaign list. Click to remove the campaigns from the system.

The Campaigns screen in the Data Area frame lists the campaigns associated with the active customer record. Click in a row to select a campaign, and to reveal its tracking code and milestone information.

To sort a list by any of its fields, click the appropriate column heading. To reverse sort the list by the same field, click the column heading a second time.

Editing a campaign

Information about individual campaigns is available from the **Campaign Details** window. This window appears when you edit an existing campaign. To edit a campaign, click the tracking code hyperlink that is next to the icon in the campaign list. Update the information in the Campaign Details window, as described in Selecting tracking codes and milestones, and click to save your changes.

Adding a new campaign

To add a new campaign, click the "Add this customer to a new campaign" hyperlink at the bottom of the campaign list. The Select Tracking Code window appears. Use this window to select a campaign and tracking code to associate with a customer. After a selection is made, the Add New Campaign window appears. Use this window to define milestones for a new campaign. When you are finished, click to save your changes. See Selecting tracking codes and milestones for more information.

Adding a new milestone

To add a new milestone to an existing campaign, click the "Add a new milestone to this campaign" hyperlink at the bottom of the milestone list. The Add New Milestone window appears. Use this window to select milestones for an existing campaign.

Deleting a campaign

To delete one or more campaigns from the list, check the box(es) in the far left column of the campaign list. Click to remove the campaigns from the system.

Tracking Codes and Milestones

Tracking codes are identification codes for a specific event or activity (such as a specific mailing, seminar, or advertisement) that is part of a campaign. Tracking codes enable you to track the effectiveness of a campaign. Milestones are used in campaigns to manage the specific actions required to meet the goals of the campaign.

Selecting tracking codes

To select a tracking code:

1. Click next to the **Tracking Code** box in the Campaign Detail window to reveal the list of codes.
2. Click to select a campaign, and to expand the groups and review their contents.
3. Locate a tracking code (identified by) and click to select it.

   The dialog box closes and the code is assigned to the customer.

Selecting milestones

When you select a tracking code from the list, a description for the code appears below the name and the associated milestones appear in the **Milestone Set** list.

To add a milestone:

1. Select a value from the **Milestone Set** list.
2. Type a value in the **Milestone Date** box.
3. Click **Add**.

   The milestone appears in the **Milestone History** table.

To remove a milestone:

1. In the **Milestone History** table, click the box next to the milestone(s) you want to delete.
2. Click .

 The milestones are removed from the table and from the campaign record.

When you are finished making changes to the campaign record, click to save your changes. You can also delete the campaign from the system by clicking .

Selecting Tracking Codes and Milestones

Tracking codes are identification codes for a specific event or activity (such as a specific mailing, seminar, or advertisement) that is part of a campaign. Tracking codes enable you to track the effectiveness of a campaign. Milestones are used in campaigns to manage the specific actions required to meet the goals of the campaign.

Selecting tracking codes

The Select Tracking Code window contains the complete list of tracking codes within the system. The codes are arranged in group hierarchies.

To select a tracking code:

1. Click to select a campaign, and to expand the groups and review their contents.
2. Locate a tracking code (identified by) and click to select it.

   The tracking code is assigned to the customer, and the Add New Campaign window appears.

Selecting milestones

The Add New Campaign window contains the list of milestone categories and milestone actions that enable you to define actions for a tracking code in a campaign.

To select a milestone category:

1. Click next to the **Milestone Category** box in the Add New Campaign window to reveal the list of milestone categories.
2. Select a value from the **Milestone Category** list.

To select a milestone action:

1. Select a value from the **Milestone Action** list.
2. Click **Add**.

   The milestone appears in the **Milestone History** list.

To remove a milestone:

1. In the **Milestone History** table, click the box next to the milestone(s) that you want to delete.
2. Click .

   The milestones are removed from the table and from the campaign record.

When you are finished making changes, click to save your changes. You can also delete the campaign from the system by clicking .

Managing Comment Information

All comments for a customer are listed on the PowerPage. The Comments screen in the Data Area frame lists the comments associated with the active customer record. Click a row in the comment list to select a comment.

For more information on viewing and sorting the records within the list of comments, see Using results lists.

You can view existing comments in the comments edit window. This window appears any time you add a new comment or edit your existing comments.

Adding a comment

To add a comment, click . The Comments Edit window appears. Enter a title in the Title area and your text in the Comment area, and click  to save the comment. Click  to save the comment and close the comment window.

Click  to clear the text in a comment.

Click  to check the spelling of the text. See Using the spelling checker for more information.

Editing a comment

To edit an existing comment, click a row in the list. Update the information in the Edit Comment window, and click  or  to save your changes.

Deleting a comment

To delete one or more comments from the list, check the box(es) in the far left column of the comments list. Click  to remove the comment from the system.

Managing Scripts

All scripts that are assigned to a customer or incident appear under the **Scripts** tab. The list identifies scripts by name and includes information about their state (in progress and completed, for example). To open the script delivery window for an existing script, click a row in the list.

For more information on viewing and sorting the records within the list of scripts, see Using results lists.

Adding scripts

To add a script, click to open the script chooser window. Scripts in this window are arranged in groups in a tree structure. The scripts that are available vary depending on the type of owner record (customer or incident). Click to expand a group and view its contents. Click the group a second time to hide the contents. Click a script to view information about it in the bottom of the window. When you have located the appropriate script, click **Start** (or double-click the script) to open the script delivery window.

See Completing a script for more information about entering the data necessary to complete a script.

Deleting scripts

To delete one or more scripts, check the box in the far left column for each script you want to delete. Click to remove the scripts from the list.

Completing a Script

Data for scripts is entered into the script delivery window. The prompts available in this window vary from script to script, but in general the process is similar to completing a form available on a Web site.

The top portion of the script delivery window contains a description of the script's purpose and the unique identifier of the owner record (customer or incident).

You can assign any customer record as a contact for the script.

To assign a contact to the script:

1. At the top of the script delivery window, click .

   The **Search for a Customer** window appears.

2. Enter criteria and click to execute the search.
3. Click the row of the customer you want to assign to the script as a contact.

You can also assign the script to a different OEP user. By default the script is assigned to whoever added it to the system. To assign the script to another OEP user click to open the user search dialog. See About OEP user selection for more information on selecting users.

Once the script is running, follow the directions in the center of the window to add the requested data to the system. When you have collected the necessary information for the step, click **Next** in the lower right hand corner of the window. If this step is the last, the button text reads **Finish**.

Warning: You can also move between script steps by pressing alt-left arrow or alt-right arrow on the keyboard.

On the left of the window there may be the list of steps that have been completed. The current step is highlighted. You can click a previous step to jump to it and review its contents. You can move through the steps using the **Previous** and **Next** buttons as needed, or click the last step in the list to return to your previous position.

If you jump to a previous step and make changes to the information, the script may require you to continue the script from that point (and revisit the steps that follow). Depending on the script settings you may be given the option to resume the script at the step you left off.

To reset the script session click . If the script session is new and has not yet been saved, all data in the script is cleared. If you opened an existing script session, the data in the script is reset to the values already saved in the database.

To print a summary of the data in the script, click . The script data appears in a printer-friendly format. Click to send the summary to your printer.

Using BI for Microsoft SSRS Reports

ONYX offers enhanced reporting capabilities that enable you to create customized reports from your data. Your ONYX installation folder contains sample report templates to report on your sales pipeline, work tickets, and support incidents.

Additionally, you can visit the Aptean User Community website to find a selection of report templates that you can use to customize your SSRS reports. You can also exchange report templates with other users of Onyx.

What would you like to do?

- Create and modify reports
- Access reports
- View report options

Creating and modifying reports

Use SQL Server Report Manager to view existing reports, to create customized reports, or to modify existing ones.

1. Click the **Reports** button on the navigation bar.

   The SQL Server Reporting Services Home page appears. You can view a list of existing reports and report templates.

2. Click a report name to generate the report. For information on working with reports, see Report Options.
3. Modify the sample report templates or use Report Builder to create customized reports that suit your requirements.

   For information on creating and modifying SSRS reports, see the Microsoft Reporting Services Report Manager Help.

Accessing reports

To access BI for SSRS reports from your Home page, see Configuring the reports section. For information on working with reports, see Report Options.

Report options

Use this information to understand the various options available when you open a report. Point to a field or a button to view its name.

- To export the report, click the **Select a format** drop down list and select one of the following formats:
    - Acrobat
    - CSV
    - MHTML
    - Microsoft Excel
    - Microsoft Word
    - TIFF
    - XML
- To navigate through the report to quickly find the information you need:
    - Enter a value in the **Current Page** box to navigate to a specific page in the report.
    - Click the **Previous Page**, **Next Page**, **First Page**, and **Last Page** arrows to navigate to other pages of the report.
    - In the **Zoom** box, select a value to zoom in or zoom out of the report.
    - Enter some text in the **Find Text** box and click the **Find** button to view an instance of the text in the report.
- Click the **Next** button to view the next instance of the entered text.
- To print the report, click the **Print** button.

Using Appointments

You can view the appointments associated with customers or incidents from the Appointments or History tab on the PowerPage or any incident page.

Important topics

- Viewing Calendar information
- About the Appointment page
- Adding and modifying appointments
- Associating appointments
- Printing appointments

About Appointment Page

The Appointment page contains the details of the appointments associated with the selected customer or incident. This page launches when you double-click an appointment in the Appointments or History tab on the customer PowerPage or an incident information page.

On the Appointment page, you can:

- View the details of an appointment from a read-only form from within OEP.
- Add notes to the appointment.
- Display the OEP company, individual, and incident records that are associated with the appointment.
- Search for new company, individual, and incident records to associate with the appointment.
- Associate the appointment with company, individual, and incident records.
- Delete/remove the association between the company, individual, or incident and the appointment.

The Appointment page has the following tabs.

Tab	Description
Details	Displays information captured from the Outlook application.
Notes	Displays the internal work notes related to the appointment. Work notes are not mapped to any field in Outlook, nor do they appear anywhere in the original Outlook Appointment. They are for use only within OEP.
Associations	Enables you to create, view, or remove relationships between the current appointment and OEP customers or incidents.

Important topics

- Adding a new appointment
- Associating appointments
- Printing appointments

From the Appointments tab

The **Appointments** tab is located on the PowerPage and on the incident information page.

To view an appointment, locate and double-click the appointment you want. The Appointment page opens.

To view calendar information for the active customer or incident, select the **Appointments** tab. The icons in the tab's toolbar enable you to view the associated appointments of the active customer or incident by day, week, or month.

The icon updates the calendar to display new appointments and cancellations.

The icon opens the Outlook Appointment page to schedule a new appointment.

From the History tab

Appointments are listed in the history tab of the associated customer's PowerPage or incident's information page. Appointments are listed chronologically along with other recent interactions associated with the customer or incident.

To view an appointment, locate and click the appointment you want. The Appointment page opens.

Important topics

- About the Appointment page
- Adding and modifying appointments
- Associating appointments
- Printing appointments

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Note: Your appointment automatically appears in the Outlook application, and on the Appointments tab of the associated customer PowerPage and/or incident information page.

Modifying appointments

1. Launch Outlook by opening the Calendar section on the Home Page, or clicking in the toolbar.
2. Double-click the appointment you want to change or delete.
3. Modify the appointment as you normally modify any Outlook appointment.
4. Click **Save and Close** to close the appointment window.

Associating Appointments

An association relates an appointment with an OEP customer record, and/or an incident record. On the Association tab, you can associate a company, individual, and/or an incident record with an appointment and save the association in OEP. You can manually add, remove, or view the different associations for the current appointment.

From the Appointments tab:

1. In the Appointments tab, double-click the appointment you want to associate. The Appointment page opens.
2. In the Associations tab, select the customer or incident you want to associate with the appointment. To select all records, select the check box in the header.
3. Press to associate the selected record(s) with the appointment.

To create an association

1. In the Associations tab, click the Add Association drop-down arrow to the left of the and select the type of record to associate with the appointment: customer or incident . The search window for the selected record type opens.
2. Enter the filter criteria necessary to find the company, individual, or incident you want to associate with the appointment.
3. Click to search for records that match the filter criteria.
4. Select the record(s) you want to associate with the appointment from the results list.
5. Click to associate the appointment with the selected records, and close the search window.

To remove an association

1. In the Associations tab, select the record that you want to remove from the association, or select the checkbox in the header to select

all records in the list.

2. Click to remove the record from the association.
3. Click **Yes** to delete the association from the appointment.

Note: Associations are not saved to the OEDB until you send the invitation to the attendees.

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Printing Appointments

You can print a summary document that includes all details, notes, and associations on the Appointment page.

1. Click  in the Appointment page header. A print preview of the appointment details, notes, and associations opens.
2. Click  in the top right corner of the print preview page to send the summary document to your printer.

Viewing Email Information

Email information is visible from the Email tab on the bottom half of the PowerPage and the incident information window. Click the tab to view the list of emails associated with the record.

Because an OEP record may have dozens or hundreds of emails associated with it, the contents of the list can be reduced by configuring the filter. Click to view the filter criteria panel. The panel has three sections to it. Criteria from one, two, or all three sections can be combined to activate the filter. When you have configured the filter, click to refresh the list using the new criteria. If you have set default criteria through the Email Preferences then the filter will use this criteria when the list first loads.

Emails can appear in a customer's list if the customer is the primary or a carbon copy (cc) recipient of the email. If the customer is a blind carbon copy (bcc) recipient, the email will not appear in their list.

Emails also appear in the list if they have been manually linked to the customer or incident record. See Adding OEP links for more information on linking an email to a customer or incident record.

The list has columns that identify the emails that have been marked for follow up ( ), those that have attachments ( ), and those that are unsent drafts ( ).

For more information on viewing and sorting the records within the list of emails, see Using results lists.

Managing email information

The email information window appears any time you compose a new email or review a draft or sent email. For more information about this window, see Managing email information.

To view an existing email, click a row in the list.

To create a new email using a template, click . See About Email Templates for more information about creating emails from predefined templates. To create a new email without using a template, click . You can switch between the two options by selecting one from the drop-down list.

Deleting emails

To delete one or more emails, check the box in the far left column of each email you want to delete. Click to remove the emails from the list and delete them from the system.

Managing Email Information

Emails are composed and reviewed through the email information window. In addition to the more common email actions, from this window you can also link an email to other OEP records and view and change the thread in which the email exists.

The window is divided into two halves. The top half contains the email delivery information and has tabs to view link and thread information. The bottom half contains the body text of the email itself.

When you are finished composing the email, click (or type CTRL-s) to send it. To save a draft of an in-progress email, click .

To forward an email to additional recipients, click . To reply to an email, click to respond only to the sender or click to respond to all recipients of the email.

To print a copy of the email, click . All email information appears formatted in a new window. Click to send this page to your printer.

To learn more about the important features of the email information window, click one of the topic links below:

- Entering delivery information
- Working with attachments
- Formatting email text
- Other text insert options
- Other options when composing
- Adding links to OEP records
- Managing threads

Entering Delivery Information

The top half of the message tab contains the options for mail delivery including to and from addresses, subject information, message priority, and attachments.

Address selection

Using the **From** menu, select an email address to which the recipient(s) can reply. This can be your OEP user email address or one of the queues your system uses to process emails (for example, support@your_company.com).

To specify recipients for the email, click any of the following three buttons: **To**, **Cc**, or **Bcc**. The Select Recipients window appears. This window has three tabs. You can select recipients from the customer database, from the OEP user tree, or from your system queues.

To select customers as recipients:

1. Click the Customer tab to reveal a search form.
2. Enter search criteria.
3. Click to perform the search.
4. Check the box for each customer you want to add as a recipient.
5. Click the button for the appropriate address type (To for main primary address, Cc for carbon copy, and Bcc for blind carbon copy).

To select OEP users as recipients:

1. Click the Internal Users tab to reveal the user list hierarchy.
2. Click a group name to expand its list of users or subgroups.
3. Click one or more names to select them.
4. Click the button for the appropriate address type (To for main primary address, Cc for carbon copy, and Bcc for blind carbon copy).

To select system queues as recipients:

1. Click the Queues tab to reveal the list of mail queues.
2. Check the box for reach row you want to add as a recipient.
3. Click the button for the appropriate address type (To for main primary address, Cc for carbon copy, and Bcc for blind carbon copy).

You can also type email addresses (and OEP user names) directly into the address lines without using the Select Names window. Click (or press CTRL-K) to verify that the addresses exist for individuals, OEP users, or system queues (this will not search company records for valid email addresses). If there are multiple matches for an address, a dialog box appears that allows you to pick the correct recipient. If an address has no known matches, you can edit it or click **Ignore** to override OEP's objections and use it in the email anyway.

Check or uncheck **Show Bcc** to toggle the appearance of the blind carbon copy (Bcc) address line. Even if the line is not visible, you can still select Bcc recipients using the Select Recipients window.

Other delivery options

Type a subject for the mail in the Subject line. The subject of the mail will also appear in any OEP lists in which this email appears.

You can set an importance level for your email messages by selecting a priority level from the priority drop down menu on the Recipients toolbar. There are three levels: Low, Normal, and High.

To mark the email for follow up, click . The follow up designation is local to OEP only. Recipients of the message will not have the email marked for follow up when they receive it. You can also mark sent and received emails for follow up for your own purposes.

To select files to attach to the email, see Adding attachments.

Working with Attachments

There are three types of files that you can attach to an email message: you can add a file from your computer, you can add a literature item, or you can add any file that has been attached to an OEP record.

Adding attachments to an unsent email

- Click the **Attach** button (located just below the recipient information) to open the Attachments dialog.
- Click the **New File** tab to attach a file located on your local hard disk. Click Browse to open the **Choose file** dialog. Navigate to the location of the file and click Open. The path to the file appears in the **File** box. Click to add the file to the Files To Add box. Repeat if necessary.
- Click the **Literature Item** tab to view the hierarchy for literature items. Navigate through the tree and click an item to add. The icons represent groups and the icons represent literature products. Click a literature product to select it and then click to add its file to the Files To Add box.
- Click the **Existing OEP Attachment** tab to attach files that are attached to the current record, or to search the database for other records that have attachments. To use attachments from other database records, click to open a search window. Select a record type and enter search criteria. Click to perform the search. Click a record from the results list. The search window closes and all files attached to that record appear in a list. Check the box of each attachment to add to the email and then click . The selected files appear by name in the Files To Add box.

When you are finished selecting attachments, click . The Attachments window closes and the files appear by name in the Attach line of the email.

Viewing attachments from a draft or received email

To open or save an attachment that is part of a draft or received email, double-click the name of the file in the Attach line in the email window. The attachment file is downloaded through the browser. Graphic files that a browser recognizes (such as .JPG or .GIF files) will appear in a new browser window. If necessary, follow the on-screen instructions for saving the file to your computer.

Warning: If you have problems viewing an attachment file directly from OEP, try saving the file before attempting to open it.

Formatting Email Text

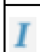
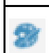
The OEP email editor provides a number of formatting options that allow you to change the appearance of email text. These functions are similar to what you usually find in a word processing application.

There are drop-down menus for font type and font size. To change the font settings for existing text, select the text with the cursor and use the menus to apply the new settings. Changing the menus without selecting text causes new text typed from the position of the cursor to inherit the new settings.

The following tables list the buttons available in the editor and describe what each does.

Text decoration

These buttons change the text appearance without changing the font or the font size.

Button	Description
	Changes the selected text to boldface
	Changes the selected text to italic
	Underlines the selected text
	Changes the color of the selected text

Text lists

These buttons change the paragraph styles to add the text to lists.

Button	Description
	Adds or converts the selected paragraphs to a bulleted list

Button	Description
	Adds or converts the selected paragraphs to a numbered list

Indentation and alignment

These buttons change the paragraph styles to alter the position of the text.

Button	Description
	Decreases the indent of the selected paragraph of text
	Increases the indent of the selected paragraph of text
	Aligns the selected paragraph of text to the left margin
	Aligns the selected paragraph of text in the center of the page
	Aligns the selected paragraph of text to the right margin

Clipboard actions

These buttons move text on and off of the system clipboard.

Button	Description
	Cuts the selected text from the editor and places it on the clipboard. Type CTRL-X to do the same without using the mouse.
	Copies the selected text and places it on the clipboard. Type CTRL-C to do the same without using the mouse.
	Pastes the contents of the clipboard into the email editor at the location of the cursor. Type CTRL-V to do the same without using the mouse.

Note: Using the paste button to paste formatted text from an external Windows application may result in the loss of the formatting information for the pasted text. If this happens, try using the keyboard shortcut CTRL-V to paste the text into the email body.

Email text in OEP is formatted using HTML. Advanced users who want to view the source HTML for email messages can select **HTML Source View** from the drop down menu. Editing the HTML is possible, but none of the formatting buttons are available in this view. To change the message text back to rendered HTML, select **Normal View** from the drop down menu.

Caution: Entering malformed HTML in the source view may cause the text to fail to appear in the normal view. Do not edit the HTML unless you are comfortable with the requirements of HTML code.

Other Text Insert Options

The Action menu provides shortcuts for inserting text into emails. These shortcuts can include additional template text or hyperlinks to OEP records.

Inserting additional template text

You can add text from OEP templates by clicking **Insert Template Text** from the Action menu. Position the cursor in the message text at the place where you want to add the template text. The Template selection window appears. See Creating emails using templates for more information on using templates.

Adding hyperlinks

Click **Insert OEP Hyperlink** in the Action menu to insert a hyperlink to an OEP record into the text of an email. Recipients of the email can then click the link to open the OEP record directly, without having to perform their own search.

To add a link:

1. Position the cursor where you want to add the link.
2. Select Insert OEP Hyperlink from the Action menu. A search window appears.
3. Select a record type to link to by clicking the appropriate tab.
4. Enter search criteria and click .
5. Locate the record you want to link from the list and click its row.

The link appears in the email message text. Recipients who have access to OEP can click the link in the email message and view the record data directly.

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Adding OEP links

Emails can be linked to customer and incident records. To view the list of links to the current email, click the **Links** tab.

If you create a manual link to a customer or incident record, the email will also appear in the list under the Email tab of the PowerPage or incident information window (unless it is hidden by a filter configuration).

To add a customer or incident link:

1. Select Add Customer Link ( ) or Add Incident Link ( ) from the link type menu.
2. Click to open a search window.
3. Enter search criteria and click to perform the search.
4. From the results list, check the box of each item you want to link to the email.
5. Click to create the links and close the results list window.
6. Click to save your changes to the list of links.

To delete links:

1. Check the boxes for the links you want to delete.
2. Click .
3. Click to save your changes to the list of links.

Other Options When Composing

- Click to print a copy of the email message. A formatted copy of the email appears in a separate window. This copy of the email includes information about attachments, threads, and all manual inks. Click to print the formatted email information.
- Click to change the accessibility of the email. A dialog box appears with buttons identifying the available security options. From here you can restrict access to the email for other OEP users. Click Public to allow any OEP user to edit this record. Click Read Only to grant other OEP users the right to read the email but deny them the right to make changes. Click Private to prevent all other OEP users from viewing the email. Once the record has been changed to private access, only the user who restricted it can return it to public access. After you have made your selection to lock the email, click to save your changes.
- Click to save a draft of your email to the database. This allows you to resume work on the email at a later time. You can find the email by reviewing the email list for the owning incident or customer record, or you can search on email ID or thread ID.
- Click to check the spelling of the email text. See Using the spelling checker for more information correcting spelling mistakes.
- Click to mark an email for follow up. Emails marked for follow up can be found with this icon in email lists.

You can change the character encoding for the email text by selecting a character set from the drop down list above the email editing area. You can set a default value for the encoding through the email user preferences.

Important: If you are composing an email that contains the Euro currency symbol (€), you cannot select the Western European (ISO) character set. The symbol will be converted to a question mark (?) when the mail is sent. To ensure that the symbol survives the encoding process, select either the

Unicode (UTF-8) or Western European (Windows) character sets.

Managing Threads

OEP stores thread information for each email in the database. By clicking the **Threads** tab, you can view the other emails that share the same thread as the current one. Emails are automatically assigned to threads when created, but you can manually attach emails to different threads if necessary. An email can be assigned to only one thread at a time.

- To open an email in the current thread, click a row in the list. A new email information window appears.
- To start a new thread for this email, click . The email is assigned a new thread with a new unique identifier.
- To assign the email to a different thread, click . A search window appears with criteria for emails. Enter criteria and click to perform the search. Click an email in the results list to add the current email to the target email's thread.

About Email Templates

Email templates contain prewritten message text that can be inserted into unsent emails as needed. Templates are useful for creating reusable messages for commonly sent business communications.

The text from a template can be used as the entire body text of an email or as a portion to build around. The text from the template can be edited before the email has been sent. A template can also extract data from the database and insert it into the email text.

Templates are editable from the Template Maintenance window, which is accessible from the Navigation bar.

Important topics

- Managing templates
- Creating emails using templates

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Managing Templates

Templates are managed from the Template Maintenance window. From this window you can view information about the templates in the system that are available to you. You can also modify existing templates and create new ones.

Templates are arranged in the Template List in groups. Groups are represented by the icon. Click a group to expand it and view its contents. Click the group a second time to hide its contents. Public shared templates are represented by the icon. Templates that are only available to you are represented by the icon. Click a template in the list to review its contents and description.

- To delete a template, select it in the Template List and click .
- To add a template, select a group in the hierarchy where the template will appear. Click to add a blank template to the group. Give the template a name and a description. To share the template with other OEP users, check **Save as Public Template**. If left unchecked, the template will only be visible to your user account.

Inserting data fields

Data can be automatically retrieved from the OEP database and added to emails before they are sent. To add data fields to a template, use the three drop down lists in the center of the Template Maintenance window. Start with Merge Data Type to select a data type source. Next select an item from the Merge Data From list. The items in this list are created by your system administrator and they identify different searches that can be performed on the data in your database. Finally, select one or more data fields to add to the text from the Insert Merge Fields list. This list contains the data items that can be inserted into the template text. The field is inserted at the position of the cursor.

You can add as many fields as you like in as many different places as you like. The fields are replaced with text from a database record when the template selection window is closed.

Formatting the text

Type text into the template as needed. Use the formatting icons to change the text size, font, weight, color, justification, or to add bullets and numbering. You can also use the spelling checker to fix any potential spelling issues. The editor section of the window is identical to that used to compose regular emails.

Saving a template

When you are ready to save the template, click .

If you want to save an existing template under a different name (for example, to make a copy), click . The **Save Template As** dialog appears. Give the template a new name and select a folder where the template can be accessed. To share the template with other OEP users, check **Save as Public Template**. Click  when you have made your changes.

Creating Emails Using Templates

OEP provides several different ways to add template text to an email message. You can create a new email message from the Navigation bar by clicking **Email Using a Template** from within the **Add New** menu. You can click from any email list. You can also add template text to any draft email by clicking **Insert Template text** from the email information window. Each of these actions causes the **Template Selection** window to appear.

Template selection

To select a template in the Template Selection window, navigate through the folder hierarchy in the template list and click the name of the template you want to use. Template groups are represented by the icon. Click a group to expand it and view its contents. Click the group a second time to hide its contents. Public shared templates are represented by the icon. Templates that are only available to you are represented by the icon. Uncheck **Show Public Templates** to view only those templates available to your user account.

Some templates contain replaceable text fragments known as merge fields. A merge field exists in the template text inside curly braces and with a dollar sign before its name. For example, {$First Name} represents the first name of a customer taken from their database record.

If the template has merge fields in it, OEP may use the information from the current record to populate the fields in the email. If this is not the case, or you want to choose a different record, click to open a search window. Enter criteria in the window and click to perform the search. A list of records that matches the criteria appears in the bottom half of the search window. Click the row of the record to use as a source for the data merge. If only one record is found that matches the search criteria, OEP automatically closes the search window and selects that record for the merge.

To preview the email with the merged data, click . A preview window appears with the record data in the email.

When you are ready to place the template text into the email, click . The text of the template is copied to the text editor of the email window. The data for the merge fields is replaced when the text is added to the email.

If you cannot find the template you need, click to open the Template Maintenance window. See Managing templates for more information about managing email templates.

Sending the email

After the template text has been copied to the email window, you can edit it as much as you like before sending the email. You can use also use text from additional templates in a single email message.

See Managing email information for information about the email information window.

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Configuring Home Page

The Home Page includes these sections: Companies and Individuals, Incidents, Tasks, Work Tickets. You can expand and contract a Home Page section by clicking and , respectively.

Click to specify the layout of the Home Page. The list on the right contains sections that do not appear on the Home Page, and the list on the left contains sections that do appear. Click **>>** and **<<** to move highlighted sections between the lists. **Move Up** and **Move Down** positions the selected sections on the Home Page. You can also configure your **Home Page** to display your Outlook calendar.

All changes to the Home Page take effect immediately. You do not need to exit and return to OEP to see the changes.

Important topics

- Configuring the company and individual section
- Configuring incident, task, and work ticket filters

Configuring Company and Individual Section

The Companies and Individuals sections include the Favorite Companies, Favorite Individuals, Top 10 Companies, and Top 10 Individuals views. The Favorite Companies and Favorite Individuals views contain customer records that you have specified as favorites. The Top 10 Company and Top 10 Individual views contain recently updated records of the companies for which you are an internal contact.

Viewing the Company and Individual sections

Click to specify the layout of the Companies and Individuals section. The list on the right contains views that do not appear on the Home Page, and the list on the left contains views that do appear. Click **>>** and **<<** to move selected views between the lists.

Move Up and **Move Down** positions the selected views within the Companies and Individuals section. The first view listed appears in the top left corner of the section, and the second view listed appears in the top right corner. The third view listed appears on the left side under the first view, and so on.

Designating a customer as a Favorite

To make a customer a favorite:

1. Go to the Internal Contacts tab.
2. Click to open the Add Contact page.
3. Select the *Favorites* Contact Type.
4. Click (Save Logged On User) to make yourself an internal contact.
5. Go to the Home Page and click to refresh the page. The customer record appears in the Favorite section.

Designating a customer as Top 10

Customers are listed in the Top 10 section when anyone updates one of the customer's incidents, incident work notes, tasks, or task work notes.

Note: Updates to the main customer record, such as changing a phone number or address, do not place the customer in the Top 10 section.

To appear in the Top 10 section, a company record must meet the following requirements:

- You must be an internal contact for the company
- There must be an incident associated with the company

Important topics

About Contacts

Configuring Navigator Filters

Navigator bookmarks are listed in the Incidents, Tasks, and Work Tickets sections of the Home Page. Create any filters that you plan to use for your Home Page before configuring these sections. When a filter specifies criteria for multiple items, such as sales incidents and tasks, that filter is available for both the Incidents section and the Tasks section of the Home Page. In such cases, each section lists only the filter results of its respective type.

Each filter result that the Home Page displays consists of the first ten items that meet the filter's search criteria, ordered according to the filter's sort criteria.

Click to specify the layout of each Incidents, Tasks, and Work Tickets section. The list on the right contains available filters that do not appear on the Home Page, and the list on the left contains selected filters that do appear. Click **>>** and **<<** to move highlighted filters between the lists.

Move Up and **Move Down** positions the selected filter results within the section, which are positioned two abreast. The results of the filter listed first in the Selected Views list appear in the top left corner of the section, and the results of the filter listed second appear in the top right corner. The results of the filter listed third appear on the left side under the first filter results, and so on.

Important topics

Selecting search criteria

Viewing Incident Information

All incidents for a customer are listed on the PowerPage.

To view incidents by a specific type, click the appropriate tab. You can also search for incidents through Task Manager, QUICK! Search, or the standard Search.

For more information on viewing and sorting the records within the list of incidents, see Using results lists.

Managing incident information

The incident information window appears any time you edit an existing incident or add a new incident to the list. For more information about this window, see Managing incident information.

To edit an existing incident, click a row in the list.

To add a new incident, click the tab of the incident type you want to add and click .

Deleting incidents

To delete one or more incidents, check the box in the far left column of each incident you want to delete. Click to remove the incidents from the list.

Managing Incident Information

Incident data can be edited through the incident information window. This window contains information that:

- Identifies the incident by type
- Identifies the customer that owns the incident
- Identifies the OEP user assigned to manage the incident
- Identifies the individual to contact regarding the incident
- Indicates the current status and priority of the incident
- Identifies a code used to track the incident against a campaign
- Indicates when the incident was added to the system

The window is divided into two halves. The top half contains the primary incident information and the bottom half lists the items associated with the incident. These items are identified by tabs. Click one to view the information named on the tab.

Editing incident information

Edit the incident information by typing in the text boxes and selecting items from the drop-down lists. Items that must contain information before the incident can be saved are marked with an asterisk (*). Incident records often require values be set for status and priority, so they can be managed according to need.

In addition to the editable text boxes and menus, the incident information window has several other important functions. They are:

- Work notes
- Contact management
- Task management
- Work ticket linking
- Alerts management
- Selecting keywords
- Incident cloning
- Attached documents

- Appointments
- Using the spelling checker
- Publishing incident notes
- Other incident features

You can attach an existing incident record to a new Messenger message by clicking in the edit window toolbar.

To assign an incident to a different customer, click next to the customer name. Enter search criteria into the form and click . If there are multiple search results, click the row of the customer that you want to own the incident.

Click to print the incident record. OEP formats the incident data into a printer-friendly format in a new window. Use the browser's **File** menu to print the record data.

While you are working with the incident record, click to save your changes. To save your changes and close the incident information window, click .

Adding and Reviewing Work Notes

Work notes help you track the progress of work tickets, incidents, and tasks. Each time you update a record you can type notes to provide additional information that cannot be saved using the drop down lists, check boxes, and small text boxes that are available on OEP windows.

Click the **Notes** tab to view the notes for the current record.

Each time an OEP record is saved the work notes are marked with an informational header. This header identifies the user who typed the notes and indicates the date and time when the notes were saved to the database. Existing notes are listed in the order they were added to the record, with the oldest ones appearing at the top of the note area. Individual sets of notes can be hidden by clicking . Only the note header with the timestamp and user ID remains visible. Click to reveal the hidden notes.

The notes area is divisible into two sections, one for the existing notes and one for typing new notes. To view only the existing notes, click . To view only new notes, click . To split the window to view both existing and new notes, click .

If you save work notes without closing the work ticket, incident, or task window, a draft of your notes appears in the existing notes section. These notes are updated with each repeated save until the window is closed. Draft notes appear in italics, and the text **Saved Draft** is appended to the header. You can continue to edit the notes in the new notes section until you save the record and close the window.

To check the spelling of your unsaved notes, click . See Using the spelling checker for more information on correcting your spelling errors.

Managing Contacts

Each incident can be assigned a number of different contacts. Within the incident information window there are tabs for external contacts and internal contacts. Click the appropriate tab to view the list of contacts for each type. Each incident record can also have a primary contact. This person is highlighted on the incident information window as the principal human link between the incident and your organization.

For more general information about contacts, see About Contacts.

Primary contact

Each incident record can have a single primary contact. If the incident owner is an individual, OEP uses the individual as the default primary contact. If the incident owner is a company, OEP uses the company record's primary contact as the default primary contact (unless the company record has no primary contact. In this case, no primary contact is assigned to the incident). You can select a different person to be the contact if necessary.

Click to unlink a primary contact from an incident record. The name of the contact reverts to the default value.

To assign a primary contact to an incident record:

1. From the incident information window, click beside the **Primary Contact** area.

   The **Search for a Primary Contact** window appears.

2. Enter criteria, and click to start the search.

   The list of individuals that match the search criteria appears in the bottom half of the window.

3. Click a record in the results list to select the primary contact.

   The search window closes and the individual's name appears on the incident record.

   Note: If the search returns only one individual record, the search window closes and the person is automatically assigned as contact for the incident.

To view the primary contact's customer record in the PowerPage, click the contact's underlined name in the incident information window.

External and internal contacts

As an incident record can have multiple internal and external contacts, the function of the contacts can be identified through the use of contact types. These types are selected by your organization and usually indicate the specific function of the contact. For example, types might include: Field Service, IT Manager, and Customer Service Representative.

To add an external contact:

1. From the **External Contacts** tab, click .

   A search window appears.

2. Enter criteria, and click to start the search.
3. Check the box next to each name in the results list to add as a contact.
4. Select a type for the contacts from the **Contact Type** list.
5. Click to save the contacts and to close the search window.

To add an internal contact:

1. From the **Internal Contacts** tab, click .

   The **Groups** dialog box appears.

2. Click a user name to select it. The user name appears above the list. Continue selecting users by clicking their names (groups are represented by the icon, and individual users are represented by the icon).

   OR

2. Type one or more user names in the text box separated by semi-colons. Press CTRL-K to resolve the names from the user tree.
3. Select a type for the contacts from the **Contact Type** list.
4. When you have selected the appropriate names, click to save the contacts and to close the dialog box.

Click to save the current OEP user account as an internal contact. Use this button to mark yourself as a contact for the customer.

You can delete contacts from either list by checking the box in the appropriate row and clicking .

Managing Tasks

To view the list of tasks for the current customer or incident, click the **Tasks** tab.

You can sort the list by any of its columns. Click a column heading to sort the list by the contents of that column. To reverse sort the list, click the column heading a second time.

To add a task, click . See Managing task information for more information on editing tasks.

To delete one or more tasks, check the box in the far left column for each task you want to delete. Click to remove the tasks from the list.

Linking Work Tickets

Work ticket records can be linked to incidents. Click the **Work Tickets** tab to view the list of work ticket records that are attached to the current incident.

You can attach existing work tickets or create new ones specifically for the incident.

To link an existing work ticket to the incident:

1. Click to open the search window.
2. Enter criteria, and click to start the search.
3. From the results list, check the box next to each work ticket to attach to the incident.
4. Click to close the window and link the work tickets.

To create a new work ticket that is linked to the incident:

1. Click to open a blank work ticket form.
2. Complete the form and click to save the work ticket.

See Adding and editing work tickets for more information on creating work tickets. You can also create a new linked work ticket through the clone function. See Cloning incidents for more information.

To unlink one or more work tickets, check the box next to each work ticket record to remove from the list. Click to unlink the work tickets.

To delete one or more work tickets, check the box next to each work ticket record to remove from the system. Click to delete the work tickets.

Click to refresh the **Details** tab for the active incident record.

Selecting Keywords

Work tickets, incidents, and tasks can be assigned keywords that aid in classifying them for searches. You can create new keywords or select existing ones from a list.

If you know of an existing keyword or want to create a new one, type the keyword into the **Enter Keywords** box. To remove keywords from a record, delete them from the **Enter Keywords** box.

To search for a keyword, click . The **Keywords** dialog box appears. The keywords that are currently assigned to the record appear in the **Current Keywords** box. To search for a keyword, type the first few letters of a word in the **Search Keyword** box and click (or press Enter on the keyboard). The keywords that match the starter letters appear in the **Matching Keywords** list. Click a keyword to add it to the **Current Keywords** box.

When you are finished selecting keywords, click to close the dialog box.

Cloning Incidents

Incident records can be cloned to create new, nearly identical records. This feature is most often used to create similar records without having to spend the time copying important data from one record to another.

The new record can be an incident of the same type as the source record, or it can be a work ticket. If you do clone an incident record to a work ticket, you have the option to link the new work ticket to the source incident automatically.

Click at the top of the incident information window to clone the incident record. A dialog box appears asking whether you want to clone the incident to another incident or a work ticket. If the new record is to be a work ticket, check **Link the new work ticket to this incident** if you want to link the two records.

Click to open the appropriate edit window. The fields in the window are automatically populated with the information from the source record. Complete or correct the information as necessary and click to save the new record.

Only the data that has been saved to the database is copied from the source incident to the cloned record. Save any changes to the source data before clicking the clone button.

Note: All fields marked with an asterisk are required and must contain data before the new record can be saved.

Related topic

Adding and editing work tickets

Attached Documents

Document files can be attached to incident records. Click the **Attachments** tab to view the list of document files that are attached to the current incident. Click  to refresh the contents of the list.

Viewing attachments

Attachments are downloaded through the browser. Graphic files that a browser recognizes (such as .JPG or .GIF files) can be viewed in the browser directly. Other files can be downloaded and saved to be opened by the appropriate application.

To view an attachment, click the appropriate row in the list to load the **Details** window. To download the attachment, click the filename link identified as the current file. If necessary, follow the on-screen instructions for saving the file to your computer. If the browser has problems displaying an attachment, try right-clicking the filename link and selecting **Save Target As** from the pop-up menu to save the file directly to your hard disk.

! **Important:** Viewing attachments that were uploaded using OEP - Windows Client (formerly known as Onyx Customer Center) launches a small application that can retrieve the file. See Using the OLE Attachment Viewer for more information.

Uploading an attachment

Attachment files are uploaded directly through the Web browser.

To upload an attachment:

1. Click .

   The **Details** window appears.

2. Enter information about the attachment in the fields of the window.
3. Click the **Browse** button to open the **Choose File** dialog box.

4. Navigate to the location of the file to upload. Click **Open** to select the file.
5. Click to close the window and start the upload.

Note: There may be limitations regarding the size of the files you are allowed to upload. Contact your OEP system administrator if you have problems uploading files.

Updating an attachment

To update the details of an attachment, click the appropriate row in the list of attached files. In the **Details** window update the necessary information. You can update or change the file if necessary. When you are finished updating an attachment, click to save your changes.

To clone the attachment information, click . Doing so creates a new Details window with the same information as the source attachment, but without the file information. Click **Browse** to locate a new file. Click to upload the new attachment to OEP.

Deleting attachments

To remove one or more attachments from the incident, check the box next to the title of the attachment(s) to remove. Click to delete the attachment(s) from the list.

Using the Spelling Checker

OEP integrates with Internet Explorer to provide users with a spelling checker for work notes in incident and work ticket edit windows. OEP uses the spelling checker dictionaries that are available in Internet Explorer.

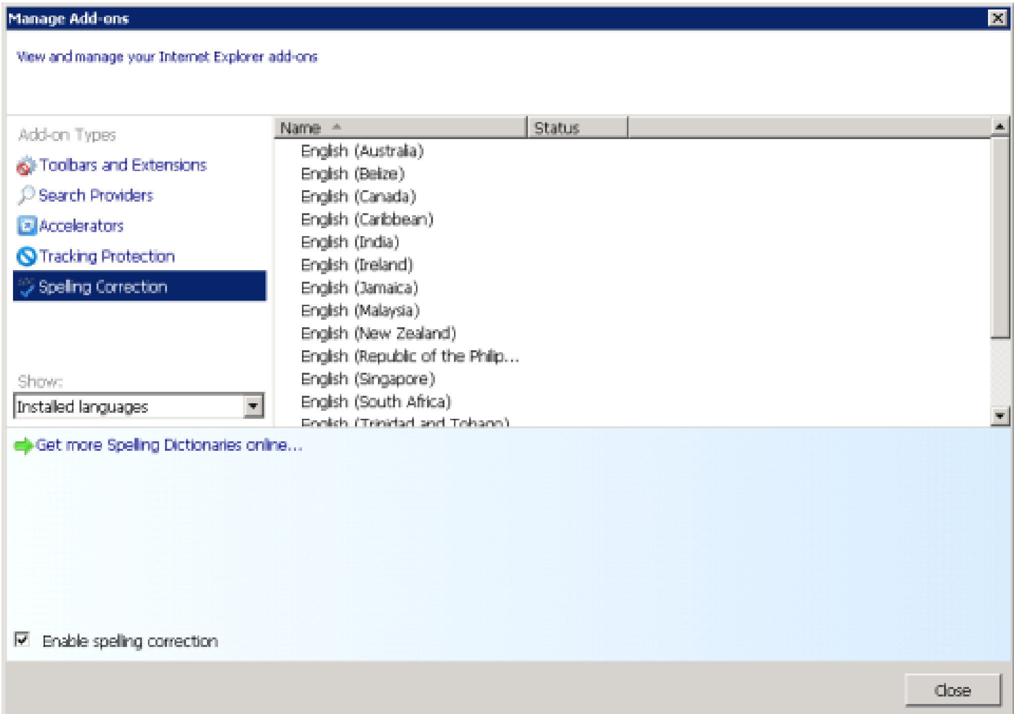
> **Note:** You can download specific spelling checker dictionaries to enable spelling checking and automatic correction in your language and locale. Ensure that you restart the browser after installing a new dictionary.

To use spell checker, you must:

1. Enable spelling correction in Internet Explorer.
2. Enable spelling checker in OEP.

To enable spelling correction in Internet Explorer

1. In Internet Explorer, click the Tools ( ) icon.
2. Click **Manage add-ons**.
3. In the **Manage Add-ons** window, click **Spelling Correction**.



4. Ensure that **Enable spelling correction** check box at the bottom left corner is selected.
5. Click **Close**.

To enable spelling checker in OEP

1. In the OEP window, click 

, and then **User Preferences**.
2. In the **General** tab, from the **Enable Spell Check** drop-down list, select **Yes**.
3. Click .

Publishing Incident Notes

OEP can be linked to an external customer-service Web site where customers and partners can review and interact with the incidents that are assigned to their OEP records. External users who visit your service Web site can read portions of the notes that you and other OEP users add to the system. Special tags identify which portions of the notes are visible to outside users. These users can then review your published notes and respond. OEP adds their responses to the internal incident notes and marks them with tags to identify their source.

There are four tags that are used to identify the text available to external users.

Tag	Description
#publish	All text that follows this tag will be visible to external users.
#endpublish	This tag indicates the end of the text that is to be visible to external users. If this tag is not manually entered after the #publish tag, it is automatically added to the end of the incident notes when the incident is saved.
#reset	This tag hides all previously published incident notes except for those entered by the external user (those notes that are marked with the #web tag).
#web	This tag indicates incident notes that were entered by external users.

Use the #publish and #endpublish tags to create blocks of text within incident notes that will be visible to the external user. The following example shows three paragraphs of notes, one of which is published externally to service Web site.

****** Entered By user1 @ 04/05/2014 07:13 AM ******

Create notes for internal users about the incident.

#publish

Create a message for external users.

#endpublish

If necessary, continue with internal notes as needed.

The #reset tag clears all previously published notes that were created by OEP users from the external Web site. All external user notes remain untouched.

Other Incident Features

The following features are also available when working with incident records. All are available from the incident information window.

Attach the incident to a message or an email

Click to open a message window with the incident as an attachment. See Sending messages for more information on using Messenger.

Click to open an email window with the incident information as an attachment. See Emailing customer and incident records for more information on emailing incident data.

Tracking work time

OEP incidents provide a feature that records the amount of time you spend working on an incident record. By correctly recording this information you can measure the time spent on managing incident records.

The timer normally runs from the instant you open the incident to the time that you close the window. To pause the timer, click . To restart the timer, click . You can manually adjust the time by typing a value (positive or negative) into the **Time Adjustment** box. The time value is recalculated when the incident is saved.

Reviewing the audit log

One of the tabs in the incident information window is for the incident's audit log. Each time an OEP user saves changes to an incident record, a small amount of summary information about the incident is written to the log. You can review the log to see which users updated the incident and when.

Using recall dates

You can set a recall date on an incident if you want to review it at a specific date and time. The recall can be attached to a reminder so that it alerts you automatically.

To set a recall date for an incident, check **Recall** in the incident information window. Type information in the **Date** and **Time** boxes. To set the recall to alert the assigned user with a dialog box, check **Remind Assigned User**.

If you select the **Send to Calendar** check box, a reminder is created in your Outlook calendar on the specified recall date.

Recall settings can be pre-configured by incident type in your OEP preferences.

Viewing incident history information

To view the history information for the active incident, select the **History** tab on the bottom half of the incident information window. The History screen in the Data Area frame lists the most recently updated records that are associated with the active incident record. History lists appear on both the PowerPage and the incident information window.

The incident history list provides a chronological record of past events for all notes, contacts, tasks, quotes, work tickets, and attachments that are associated with an incident record. To view a record included in an incident's history, click a row in the history list. The record's edit window appears. Use this window to view or update information for that record. Click to save your changes.

Watching an Incident

You can watch a record by clicking . Click to unwatch a record. When a watch is set on an incident, the administrator gets an e-mail notification when the incident is modified.

About Forecasts and Quotes

Sales and marketing teams use forecasts internally as a means of projecting sales that are still in progress. You create a forecast for an incident, and you can base your quotes upon that forecast. Forecasts contain a confidence-weighted total price. Confidence values can be assigned to individual products or to the forecast as a whole. This allows you to gauge the likelihood of closing each line item included in the forecast, and the entire forecasted sale.

Quotes are used to give formal pricing information to customers. Quote information can be formatted into a quote document that is distributed to the customer.

Each incident in the database can have one forecast and an unlimited number of quotes attached to it.

Important topics

- Viewing forecast and quote information
- Managing forecast and quote information

Viewing Forecast and Quote Information

Summary forecast and quote information appears in the incident information window. Click the **Quotes** tab to view the forecast and quotes associated with the current incident.

The Quotes tab is broken into three sections. The header section just below the tab contains the **Action** menu and a list where you can select the incident's forecast or any of its saved quotes. The middle section lists the products that are attached to the forecast or quote. The bottom section contains the total value of all the items included in the forecast or quote, including any weighting adjustments from a probability of sale calculation.

From the list in the header, select the forecast or a quote to view the product line items and the total value of the order. The items in the product list normally appear in the order they were added to the forecast or quote. To sort the product list by any of its columns, click the appropriate column heading. To reverse sort the list by the same column, click the column heading a second time.

Managing forecast and quote information

Forecast and quote information is managed through a combination of windows that are accessible from the header of the forecast and quote tab. For more information about these windows, see Managing forecast and quote information.

Deleting a quote

To delete a quote, select it by name from the list in the header and select **Delete Quote** from the **Action** menu.

Managing Forecast and Quote Information

Forecast and quote information is managed through a combination of windows that are accessible from the header of the forecast and quote tab. Through these windows you can:

- Select products for the forecast or quote
- Specify a sales probability for a forecast
- Create a quote document for distribution to a customer

Almost all forecast and quote functions are available from the **Action** menu. The selectable items in the menu change depending on whether you are reviewing the contents of the forecast or a quote.

The active forecast or quote appears in the list box in the header. Because an incident can have only one forecast, select **<Forecast>** to view the forecast information. Quotes appear in the list box by name. Select a quote by clicking its name.

To create a new quote, select **New Quote** from the **Action** menu.

To save your changes to a forecast or quote, click **Save Forecast** or **Save Quote** from the **Action** menu. In addition, any time a forecast or quote has unsaved information, the  button appears in the header. Click the button to save your changes.

The primary tasks for forecast and quote management are covered in the following sections:

- Editing line items
- Editing properties
- Creating quote documents
- Other actions

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Editing Line Items

Each forecast and quote contains one or more products that comprise a possible customer order. Products are selected through the Forecast/Quote Line Detail window. Through this window you can specify product quantities, name prices, grant discounts, set shipping dates, and predict closing probabilities. The exact combination of properties available depends on the specifics of your system, but the most common options are described here.

Selecting products

To select a product for a forecast or quote, navigate through the Selected Product tree. Products in the tree are arranged in group hierarchies. The icons represent the groups and the icons represent the products. Locate a product and click to select it. Type the number of products the customer may want to purchase in the **Quantity** box.

Applying discounts

After you select a product, pricing information appears in the **Unit Price** box. Below this box are **Discount** settings. You can grant discounts in two ways: as a percentage of the unit price, or as a numeric reduction on the unit price. To apply a discount, select a type from the list box (**Amount** or **Percent**) and type a number in the **Value** box. The total discount is calculated and applied to the extended total for the line item.

Setting close probabilities

Closing probabilities for forecasts can be set in individual products in the forecast and on the entire forecast itself. To set the probability for an individual item, type a value in the **Confidence** box. When you close the Forecast/Quote Line Detail window, the confidence values for the line items and the total forecast are combined and the adjusted price total of the forecast appears in the forecast summary. See Editing properties for information on setting a confidence value for an entire forecast.

To add line items:

1. Click in the header section of the forecast and quotes tab.

   The Forecast/Quote Line Detail window appears.

2. Double-click a product in the Selected Product tree.
3. Complete the detail information for the product, including quantity, unit price, and any discount information if necessary.
4. If you are working with a forecast, type a probability percentage value in the **Confidence** box.
5. Click to save the new product and to close the window.

   OR

6. Click to save the new product and add another one.

   The values in the window reset to their defaults. Repeat steps 1 through 4.

To change line items:

1. Click the underlined product name in the Product column of the list of products for the forecast or quote.

   The Forecast/Quote Line Detail window appears.

2. Update the product information as necessary.
3. Complete the detail information for the product, including quantity, unit price, and any discount information if necessary.
4. Click to save the new product and to close the window.

   OR

5. Click to save the product and add another one.

   The values in the window reset to their defaults.

To delete line items:

1. Check the box in the far left column for each product you want to delete.
2. Click .

    The products are removed from the forecast or quote.

Editing Properties

Forecasts and quotes have properties that affect the item as a whole. These properties are editable through the Forecast/Quote Properties window. The exact combination of properties available depends on the specifics of your system, but the most common options are described here.

To view the properties for the active forecast, click **Forecast Properties** from the **Action** menu. To view the properties for the active quote, click **Quote Properties** from the **Action** menu.

When you are finished making changes, click to save your edits.

Common properties that are used in forecasts and quotes appear in the following table.

Forecast properties	Relevant to	Description
Close Date	Forecast	A projected sale date for the forecast. This enables you to report the date by which estimated future revenue detailed in the forecast is expected to be realized by your organization. This date is not used internally (OEP does not modify forecasts that have not been converted into quotes by their close dates), but it can be used for reporting purposes.
Close Probability	Forecast	The likelihood (expressed as a percentage) that the customer will purchase all of the products listed in the forecast. This value is used to calculate the revenue the forecast is currently expected to generate.

Forecast properties	Relevant to	Description
Comments	Quote	Space for comments, up to a maximum of 255 characters.
Create Date	Quote	The date the quote was added to the system.
Currency Code	Forecast/Quote	If enabled on your system, this code can be used to show the cost of the forecast or quote in a secondary currency.
Expiration Date	Quote	The date the quoted offer to the customer ceases to be valid. This date is not used internally (OEP does not modify quotes that are past their expiration dates), but it can be used for reporting purposes.
Name	Quote	A name to identify the quote in the list.
Status	Quote	A value that represents the status of the quote in the sales cycle.

Creating Quote Documents

When a customer is nearly ready to make a purchase, you can create a quote document that lists the products that comprise the order. These documents are created from templates that format the quote information for distribution by printed page (for stuffing in envelopes, transmitting by fax, or attaching to emails) or to be viewed online as HTML. All information in the quote is copied to the template, including the customer's name and contact information, and product quantities and price data.

The variety and type of quote documents available to your organization is determined by the OEP system administrator, but some common ones created by Onyx appear in the following table.

Template	Description
Onyx Quote	Formats the quote data into a Microsoft Word document.
Onyx Quote - Multiple Currency	Formats the quote data into a Microsoft Word document, and it includes information regarding the alternate currency included as part of the pricing data.
Onyx Quote (Web)	Formats the quote data into a single HTML page that can be viewed online.
Onyx Quote (Web) - Multiple Currency	Formats the quote data into a single HTML page that can be viewed online, and it includes information regarding the alternate currency included as part of the pricing data.

To create a quote document, select **Generate Quote Document** from the **Action** menu. The **Customer Letter** window appears. Select a template from the **Available Templates** list and configure the quote for the customer. There are options for customer address and telephone number. Other options may appear depending on the quote process within your organization.

When you are ready to generate the document, click 🖶. OEP formats the data in a new window. Print the document or save it to your computer for distribution to the customer.

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Other Actions

The following actions are also available when working with forecast or quote records. All three are available from the Action menu.

Cloning a quote

Quote records can be cloned to create new, nearly identical records. This feature is most often used to create similar records without having to spend the time copying important data from one quote to another. All product information is copied to the new quote.

To clone a quote, select **Clone Quote** from the **Action** menu. The new quote becomes active in the forecast and quotes tab. Update the properties of the quote as needed.

Creating a quote from a forecast

An incident's forecast can be converted into a quote for release to a customer. All product information in the forecast is copied to the new quote.

To convert a forecast into a quote, select **Create Quote from Forecast** from the **Action** menu. The new quote becomes active in the forecast and quotes tab. Update the properties of the quote as needed.

Creating a forecast from a quote

Any of an incident's quotes can be copied to replace the forecast. All product information in the quote is copied to the forecast. Any existing information in the forecast is lost. The source quote remains unchanged.

To copy the information of the active quote into the forecast, select **Replace Forecast with Quote** from the **Action** menu. The forecast becomes active in the forecast and quotes tab. Update the properties of the forecast as needed.

About Tasks

Sales opportunities, service requests, and support incidents can be divided into sub-incidents called tasks. An incident can have an unlimited number of tasks. Use tasks to break incidents into manageable segments or to divide the work required to close an incident among several OEP users. A single task can be assigned to only one person at a time.

Important topics

- Viewing task information
- Managing task information

Viewing Task Information

Summary task information can be viewed in three different places. Task lists appear on both the PowerPage and the incident information window, and you can search for tasks with Task Manager.

The task lists on the PowerPage and the incident information window display similar information. For more information on viewing and sorting the records within the list of tasks, see Using result lists.

Managing task information

The task information window appears any time you edit an existing task or add a new task to the list. For more information about this window, see Managing task information.

To edit an existing task, click a row in the list.

To add a new task, click .

Deleting tasks

To delete one or more tasks, check the box in the far left column of each task you want to delete. Click  to remove the tasks from the list.

Managing Task Information

Task data can be edited through the task information window. This window contains information that:

- Identifies the task by incident type
- Identifies the incident that owns the task
- Identifies the OEP user assigned to manage the task
- Identifies the individual to contact regarding the task
- Indicates the current status and priority of the task

Edit the task information by typing in the text boxes and selecting items from the drop-down lists. Items that must contain information before the task can be saved are marked with an asterisk (*). Task records often require values be set for status and priority, so they can be managed according to need.

In addition to the editable text boxes and menus, the task information window has several other important functions. They are:

- Adding and reviewing work notes
- Linking a primary contact
- Linking parent incidents
- Using recall dates
- Selecting keywords
- Using the spelling checker

While you are working with the task record, click  to save your changes.

Tasks cannot be deleted from the task information window. To delete a task, open the parent incident of the task and remove it there. See Managing tasks for more information on deleting tasks.

Linking a Primary Contact

Each task record has a single primary contact. By default, a task is assigned the primary contact of the parent incident. You can select a different contact if necessary.

To select a primary contact for a task:

1. Click  next to the **Contact** field.

    A search window appears.

2. Enter criteria, and click  to start the search.
3. Click a name from the results list to assign as the primary contact for the task.

Linking Parent Incidents

A task must be assigned to an incident before it can be saved. If you create a task from the Task tab of the PowerPage, you must assign the parent incident manually. Tasks created from within the incident information window are automatically linked to the active incident. You can change the parent incident for a task at any time.

To change the parent incident for a task:

1. Click  at the top of the task window.

    A search window appears.

2. Enter criteria, and click  to start the search.
3. Click a row in the results list to select the parent incident for the task.

You can open the incident information window for the parent incident by clicking the underlined ID link next to **Owner ID**.

Using Recall Dates

You can set a recall date on a task if you want to review it at a specific date and time. The recall can be attached to a reminder so that it alerts you automatically, or the date can be used as part of a Task Manager search.

To set a recall date for a task, check **Recall** in the task information window. Type information in the **Date** and **Time** boxes. To set the recall to alert the assigned user with a dialog box, check **Remind Assigned User**.

If you select the **Send to Calendar** check box, a reminder is created in your Outlook calendar on the specified recall date.

Selecting Search Criteria

List Manager searches are based on views of different database portions. Common views include Companies and Individuals. Select the appropriate view from the drop down list and the search criteria that can be used for that view appears in the window. The List Manager window features the available criteria from the view on the left side of the window and the selected criteria for the search on the right side.

Criteria selection

The selected criteria list is divisible in up to three blocks. The contents of a block are combined when the search executes. Each block is then used as a separate test against the contents of the database. By dividing criteria in separate blocks you can broaden the scope of the search. Individual criteria lines in the blocks can be included or excluded in the search as needed by checking the box adjacent to each line. To select or deselect all criteria, check the box at the top of the list.

Within the available criteria list, the icons represent data categories. Click a category to view its available data items and subcategories. Each item is represented by the icon. Click a data item to add it to the selected criteria list.

When you click a data item, the Input Criteria dialog box appears. From here you can specify a value for the data item. Depending on the type of data, there are two different ways to specify criteria. Some items allow you to select an operator (for example, less than, greater than, equal to, etc.) and type a data value. Other items provide a list of predetermined values from which you can select one or more to include or exclude from the results set. After you specify a value, select a block in which to place the criteria and click to close the dialog box.

Note: Selecting at least one criterion per block that is based on an indexed data field may improve the performance of the search. Indexed fields are marked by the icon.

Advanced users who want to customize the SQL query string that is used for the search can click the button. The string appears in place of the selected criteria rows. If you make changes to the SQL string you cannot return to the list view. Otherwise, click to hide the SQL string and view the original rows of selected criteria.

Advanced users who want to view the SQL query string that is used for the search can click the button. The string appears in place of the selected criteria rows. You cannot edit the SQL string. Click to hide the SQL string and view the original rows of selected criteria.

Searching by date

The List Manager date search begins at midnight of the date entered. When you search for records by date using the less-than-or-equal-to operator (<=), always include a specific time period in your search query. Otherwise the List Manager search finds no matches, and returns the records for the *previous* day to the date entered instead. Entering a time period ensures all the records you want are included.

Other options

Check the **Ignore Duplicates** box to prevent the search from returning multiple instances of the same record in the results list.

Click to reset the entire List Manager window. Click to clear out lines from the selected criteria list. Only lines with checked boxes will be cleared when you click . Unchecked lines remain in the list.

Click to get a count of the number of records that will be returned when the search is executed. By using this button you can get a preliminary idea of the scope of your search before running it.

Executing the search

Click to execute the search and generate a results list.

Selecting Returned List of Columns

You can select and arrange the data that your search returns. The views for a search, which are commonly Companies or Individuals, consists of columns of data about each record that meets the search criteria. These views have a default list of columns that you can modify to suit your needs.

Before configuring the column list, select the view from the list box in the upper left corner of the List Manger window.

Click  on the List Manager window to display the **Result Set Column Definition** dialog box. This dialog box displays on the left a list of all column names from which to choose, and on the right, the columns that are currently selected. For new searches the default list of columns appears on the right.

Click to view the columns available for each data category. The currently selected column names are bold. Click a column name to include it in the currently selected list. To remove a column, select it from the current list and click **Remove**. Click  to remove all columns, except the required columns, from the selected list.

Selecting a column from the current list and clicking **Move Up** or **Move Down** positions the column in the results list.

Click  to close the **Result Set Column Definition** dialog box.

Click  on the List Manager window to save changes to the column list and the search select statements.

Warning: Customizing the columns returned in the result set can influence the results returned by the List Manager search. This can occur when you add a child object column to the result set. For example, if you create a search that returns a list of companies (parent objects), but then customize the returned list of columns for the search to return an incident (child object) column, companies that do not have a child incident object will not be returned by your search.

Working with Saved Searches

Commonly used searches can be saved and recalled as needed. Searches can be saved for personal use, or marked as public to be made available to other OEP users.

Search administration is performed through the Search dialog box. This box lists the available public and private search in separate lists.

To save a search:

1. Click .

   The **Search** dialog box appears.

2. Type a name for the query in the **Select a Search from the Lists Below** box.

   OR

3. To replace an existing search, click a name in the public or private list.
4. To save the search as public and to make it available to all OEP users, check the **Save as Public List** box.
5. Click  to save the search and close the dialog box.

To load a saved search:

1. Click .

   The **Search** dialog box appears.

2. Click a saved search from either the public or private lists.
3. Click  to load the search and close the dialog box.

To delete a search:

1. Click .

   The **Search** dialog box appears.

2. Click a search from either the public or private lists.
3. Click to delete the search and close the dialog box.

Working with a Result List

A List Manager search generates a list of customers or customer-related information against which you can execute a bulk customer process. Common processes range from simple data exports to the creation of multiple incidents.

After the search is complete, the result list shares half of the List Manager window with the criteria selection lists. You can expand and contract the result list section by clicking ▲ and ▼, respectively.

Click a row in the result list to view or edit an item.

To sort the list by any of its fields, click the appropriate column heading. To reverse sort the list by the same field, click the column heading a second time.

Using a bulk customer process

The available bulk customer processes appear in a dropdown list above the column headings. Select records to process by clicking their checkboxes. To select or deselect the entire list, click the checkbox next to the column headings. Select a process (also known as a bulk action) in the list and click ⊕. The process will be applied only to the selected items in the list.

About the processes

Each of the common customer processes is described below. Your organization may have added additional processes.

Export selected items to Microsoft Excel

This process exports the list to an HTML file that can be imported into Microsoft Excel. Use this option to print a List Manager result set from Excel.

Export selected items to a CSV file

This process exports the list to a Comma Separated Values (CSV) file that can be imported into Microsoft Excel or another application. Use this option to print a List Manager result set from the importing application.

Create Sales Opportunities/Service Requests/Support Requests for selected items

These processes create duplicate incidents for the selected records in the list. A window appears in which you enter the relevant (and common) incident data. When you close the window, OEP creates a new incident for each of the selected customers in the list.

! **Important:** When you use this customer process to create an incident, the maximum length in characters for the worknotes is 255 characters. Any worknote data beyond this limit is not saved to the new incident(s).

Add an External Contact to selected items

This process assigns a company or individual as an external contact to the selected records in the list. The process begins by opening a customer search form. Perform the search and click an item in the result list to assign the customer as a contact for the selected records.

Add an Internal Contact to selected items

This process assigns an OEP user as an internal contact to the selected records in the list. The process begins by opening a user selection form. Find an OEP user and click to assign them as a contact to the selected records.

Create a Literature Order for selected items

This process creates a literature order for each of the selected records in the list. A window appears in which you enter the relevant (and common) literature order data. When you close the window, OEP creates a new order for each of the selected customers in the list.

Create a Campaign for selected items

This process enrolls the selected customers into a newly created campaign. The process begins by opening a campaign creation form. Create the campaign and click to enroll the customers into it.

Add a Survey to selected items

This process assigns a survey to the companies or individuals in the list. The process begins by opening a surveys form. Select a survey from the list and click to assign the survey to the customers.

Create Script Session for selected items

This process assigns a script the companies or individuals in the list. The process begins by opening a script and OEP user selection form. Select a script and (if necessary) an OEP user to assign it to. Click to assign the script to the customers.

Important topic

Selecting the returned list of columns

Send questions, comments, suggestions about documentation to Documentation@aptean.com

Reading Messages

When the Messenger window opens it displays the list of messages currently in your inbox. The message list appears in the top half of the window, and a preview of the text of the active message appears in the bottom half.

To view a message, select a row in the list and click . You can also double-click a message in the list to view its contents. The full message appears in a separate window.

To view a record attached to a message, click the link next to the word Attachment in the message header. Depending on the type of the attached record, the information appears in the Data Area frame or in a separate window.

To reply to a message, click to reply to the message sender or click to reply to the sender and all of the other recipients of the message. See Sending messages for information on how to compose messages.

To forward a message, click . All information in the current message, except for the recipient list, is copied to the new message. See Sending messages for information on how to compose messages.

Click to retrieve any new messages from the server. Messenger will periodically check for new messages on its own, but you can force a check at any time by clicking the button.

To delete one or more messages, check the box in the far left column of the message list for each message to delete. Click to delete the messages from the system.

Use the and buttons to expand and contract (hide) the two halves of the window.

Send questions, comments, suggestions about documentation to
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Sending Messages

Sending a message in OEP is similar to composing an email. Each message has a list of recipients, a subject, a body, and (optionally) an attachment.

Click from the Messenger window to open the **Compose Message** window.

To select recipients, click to open the **Recipient** dialog box. Within the dialog, groups are represented by the icon, and individual users are represented by the icon.

To select users as recipients:

1. Click a group name to expand its list of users or subgroups.
2. Click a user name to select it. The user name appears in the Recipient box. Continue selecting users by clicking their names.
3. When you have selected the appropriate names, click **OK** to close the dialog box.

Warning: Double-click a group name to select all users within that group.

To add the active customer record as an attachment, click . To search for another record to attach to the message, click . Complete the search form and click a record to attach to the message. See About Search for more information about searching for OEP records.

Click to clear all message information. Click to remove the attachment from the message.

Click to check the spelling of the message text. See Using the spelling checker for more information.

When you are finished composing the message, click to send it.

Adding and Editing Work Tickets

The windows for adding and updating work tickets are very similar. The add window contains the basic fields for creating the work ticket record. Once the ticket has been saved, the edit window allows for more options for associating the work ticket to other OEP records.

Adding work tickets

The process for adding a work ticket to the system begins with a blank form. This form contains fields for description information, OEP user assignment, and resolution status. Fields that must contain information before the ticket can be saved are marked with an asterisk. At the bottom of the form is a large text box for entering notes.

When you have completed the form, click to save the work ticket data. After the data is saved, the work ticket form changes to edit mode. See below for more information about the additional information that can be added to a work ticket through the edit mode.

Editing work tickets

The window for editing work tickets is similar to the one used for adding, but includes a set of tabs along the bottom half of the window. These tabs contain information about the history of the work ticket and the other OEP database records that are linked to it.

You can make changes to any of the fields in the top half of the form. The fields are identical to those that were available when the work ticket was first created.

Note: To close a work ticket, you must first select a product from the **Product** box before you can set resolution codes.

The tabs

Click a tab to review additional information about the work ticket. The standard tabs and their functions appear in the following table.

Tab	Description	Additional information
Notes	Contains information added by users each time they edit the work ticket record.	See Adding and reviewing worknotes for information about using notes.
Contacts	Contains a list of links to OEP users who can be contacted regarding the contents of the ticket.	See Linking work tickets for information about using the Contacts, Customers, Incidents, and Linked Work Tickets tabs.
Customers	Contains a list of customer records that are related to the ticket and its contents.	
Incidents	Contains a list of incident records that are related to the ticket and its contents.	

Tab	Description	Additional information
Linked Work Tickets	Contains a list of other work tickets that are related to the ticket and its contents.	
Audit Log	Contains a table that lists the times the work ticket was edited.	The contents of the Audit Log list can be sorted by any of its columns. Click a column heading to sort the list according to that column. To reverse sort the list, click the column heading a second time.
Attachments	Contains a list of downloadable files related to the ticket and its contents.	See Attached documents for information about using the Attachments tab.

Other options

See Selecting keywords for information about adding keywords to a work ticket record.

You can attach an existing incident record to a new Messenger message by clicking in the edit window toolbar.

Click to print the work ticket. A dialog box appears with check boxes that let you choose which portions of the work ticket you want to print. This can be useful when printing a work ticket with a large amount of notes. OEP formats the work ticket data into a printer-friendly format in a new browser window.

Click to clone the work ticket. A dialog box appears with check boxes that let you choose which links in the current work ticket will be included in the new work ticket. Check the appropriate boxes and click again. All of the data fields (including the notes) in the new work ticket are automatically populated with the data from the source work ticket. Click to save the new work ticket.

Note: Only the data that has been saved to the database is copied from the source work ticket to the cloned work ticket. Save any changes to the source record before clicking the clone button.

Click to change the accessibility of the record. A dialog box appears with buttons identifying the available security options. From here you can restrict access to the record by other OEP users. Click **Full public access** to allow any OEP user to edit this record. Click **Public view only** to allow any OEP user to read the record without making changes. Click **Private access only** to prevent all other OEP users from retrieving the work ticket record. Once the record has been changed from public access, only the user who restricted it can return it to public access.

While you are working with the work ticket record, click to save your changes. To save your changes and close the work ticket information window, click .

Click to delete the work ticket from the system.

Linking Work Tickets

Work tickets can be linked to other types of OEP data to track customer and product issues. Work tickets can be linked to OEP customer and incident records. Work tickets can also have OEP users assigned to them as internal contacts and can be linked to other work tickets.

From the work ticket window, click a tab to view the list of items of that type that are linked to the work ticket. Click a row in the list to view or edit an item (except for contacts). The data for the item appears in a separate window.

Linking internal contacts

OEP users can be linked to work tickets as internal contacts.

To link an OEP user to work ticket:

1. Click the **Contacts** tab to view the current list of internal contacts.
2. Click .

   The **Add Contact** dialog box appears.

3. Click a user name to select it. The user name appears above the list. Continue selecting users by clicking their names (groups are represented by the icon, and individual users are represented by the icon).

   OR

4. Type one or more user names in the text box separated by semi-colons. Press CTRL-K to resolve the names from the user tree.
5. Select a value from the **Contact Type** list to indicate the user's role as a contact.
6. Click to save your changes, or to save a logged on user.

To delete contacts from the list, check the box next to the name of the user(s) to remove. Click to delete the users from the list and unlink them from the work ticket record.

Linking customers

OEP customer records can be linked to work tickets. The list of work tickets linked to a customer record is also available from the customer PowerPage.

To link a customer to a work ticket:

1. Click the **Customers** tab to view the current list of linked customer records.
2. Click .

   A search form appears.

3. Specify search criteria.
4. Click .

   The results of the search appear below the search criteria.

5. Each record in the list has a check box next to the customer ID. Check the box for each customer to be linked to the work ticket.
6. Click to save your changes.

To remove customers from the list, check the box next to the ID of the customer(s) to remove. Click to delete the customers from the list and unlink them from the work ticket record.

Linking incidents

OEP incident records can be linked to work tickets. The list of work tickets linked to an incident is also available from any incident editing window.

To link an incident to a work ticket:

1. Click the **Incidents** tab to view the current list of linked incident records.
2. Click .

   A search form appears.

3. Specify search criteria.
4. Click .

   The results of the search appear below the search criteria.

5. Each record in the list has a check box next to the incident ID. Check the box for each incident to be linked to the work ticket.
6. Click to save your changes.

To remove incidents from the list, check the box next to the ID of the incident(s) to remove. Click to delete the incidents from the list and unlink them from the work ticket record.

Linking other work tickets

Work ticket records can be linked to other work tickets.

To link a work ticket to a work ticket:

1. Click the **Linked Work Tickets** tab to view the current list of linked work ticket records.
2. Click .

   A search form appears.

3. Specify search criteria.
4. Click .

   The results of the search appear below the search criteria.

5. Each record in the list has a check box next to the work ticket ID. Check the box for each work ticket record to be linked to the work ticket.
6. Click to save your changes.

To remove work tickets from the list, check the box next to the ID of the ticket(s) to remove. Click to remove the tickets from the list and unlink them from the current work ticket record.

To delete linked work tickets from the system, check the box next to the ID of the ticket(s) to delete. Click to delete the tickets.

Click to create a new work ticket that is automatically linked to the current work ticket. See Adding and editing work tickets for more information on adding a work ticket to the database.

Attached documents

Document files can be attached to work ticket records to aid in issue resolution. Click the **Attachments** tab to view the list of document files that are attached to the current work ticket. Click to refresh the contents of the list.

Viewing attachments

Attachments are downloaded through the browser. Graphic files that a browser recognizes (such as .JPG or .GIF files) can be viewed in the browser directly. Other files can be downloaded and saved to be opened by the appropriate application.

To view an attachment, click the appropriate row in the list to load the **Details** window. To download the attachment, click the filename link identified as the current file. If necessary, follow the on-screen instructions for saving the file to your computer. If the browser has problems displaying an attachment, try right-clicking the filename link and selecting **Save Target As** from the pop-up menu to save the file directly to your hard disk.

> ! **Important:** Viewing attachments that were uploaded using OEP - Windows Client (formerly known as Onyx Customer Center) launches a small application that can retrieve the file. See Using the OLE Attachment Viewer for more information.

Uploading an attachment

Attachment files are uploaded directly through the Web browser.

To upload an attachment:

1. Click .

   The **Details** window appears.

2. Enter information about the attachment in the fields of the window.
3. Click the **Browse** button to open the **Choose File** dialog box.

4. Navigate to the location of the file to upload.
5. Click **Open** to select the file.
6. Click to close the window and start the upload.

Note: There may be limitations regarding the size of the files you are allowed to upload. Contact your system administrator if you have problems uploading files.

Updating an attachment

To update the details of an attachment, click the appropriate row in the list of attached files. In the **Details** window update the necessary information. You can even update or change the file if necessary. When you are finished updating, click to save your changes.

To clone the attachment information, click . Doing so creates a new Details window with the same information as the source attachment, but without the file information. Click **Browse** to locate a new file. Click to upload the new attachment to OEP.

Deleting attachments

To remove one or more attachments from the work ticket, check the box next to the title of the attachment(s) to remove. Click to delete the attachment(s) from the list.

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Date And Time Settings

Click the **Date And Time Settings** tab to configure the default options for date, time, negative number, negative currency , and decimal formats.

The following table lists and describes the options available from the Date And Time Setting user preferences.

Preference	Description
Short Date	Select the date format to appear across the OEP.
Short Time	Select the time format to appear across the OEP.
First day of the week	Select the day to appear as first day of the week on the calender across OEP.
Decimal Digit Grouping Symbol	Not editable.
Negative Sign Symbol	Not editable.
Number Digit Grouping Symbol	Not editable.
Negative Number Format	Select the number format for negative numbers across the OEP.
Negative Currency Format	Select the currency format for negative currency across the OEP.
No of digits after decimal	Select the number of digits to appear after the decimal.

! **Important:** Log out and log on to OEP to apply the settings you updated.

Navigator

Use this information to configure and customize Navigator and Onyx Mobile to suit your organization's requirements. For information on modifying OGS configurations, see Modifying the OGS Configuration File

The tasks explained in this topic are:

- Administering Navigator
- Customizing Navigator

Specifying Search Criteria

Navigator provides several options for selecting values and refining your search. You can use search operators and search delimiters, select options from a drop-down list or a tree picker, or select dates from a date picker. The sentence-like phrasing of search criteria enables you to enter or select the appropriate values to run your search. Use the following information to understand how each option works.

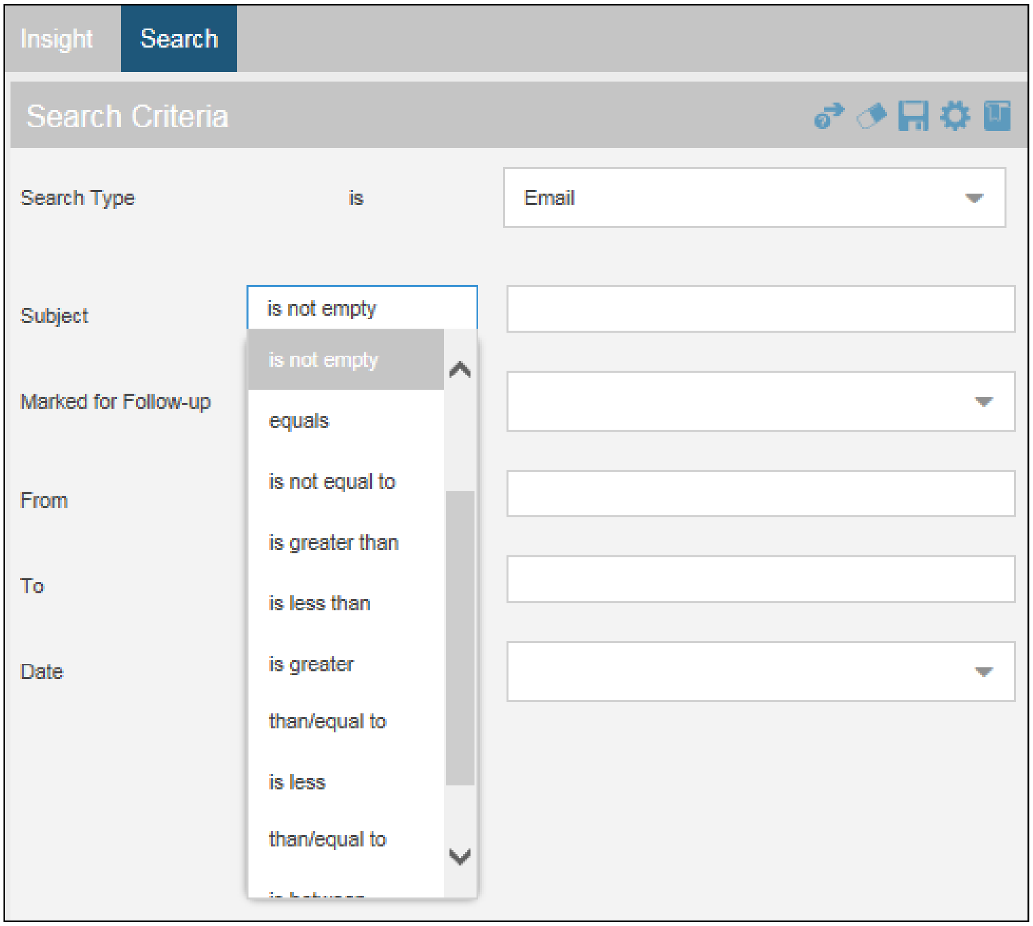
- Search operators
- Search delimiters
- Drop-down lists
- Tree pickers
- User pickers
- Date pickers

Search operators

For search criteria fields that use text boxes, you can use search operators to filter search values. Customer ID, Description, Company Name, and Customer Name are examples of text boxes.

The search operator text is positioned between the criteria description and the text box where you enter values. The default search operator is Begins with.

- To view the list of search operators, click the search operator that is displayed for the search criterion.



The following search operators are used in Onyx.

Search Operator	Definition
Begins With	Finds records that begin with the specified value for the selected search criterion.
Is Empty	Finds records that have no value defined for the selected search criterion. The input text box is unavailable when you select this operator.
Is Not Empty	Finds records where the selected search criterion has a value defined. The input text box is unavailable when you select this operator.
Equals	Finds records where the selected search criterion is exactly equal to the specified value.
Is Not Equal To	Finds records where the selected search criterion has a value not equal to the one specified.

Search Operator	Definition
Is Greater Than	Finds records where the selected search criterion has a value greater than the one specified.
Is Less Than	Finds records where the selected search criterion has a value less than the one specified.
Is Greater Than or Equal To	Finds records where the selected search criterion has a value greater than or equal to the one specified.
Is Less Than or Equal To	Finds records where the selected search criterion has a value less than or equal to the one specified.
Is Between	Finds records where the selected search criterion has a value that falls within the specified range. The input text box consists of two fields to enter a range when you select this operator.

Search delimiters

Onyx supports two delimiters that can be used to expand or limit the text criteria of a search. The '%' delimiter acts as a wild card specifying any possible character or list of characters. The '[]' delimiter can contain a list of possible characters to restrict the search. The delimiters can be combined, although the '%' can only be placed at either end of a search string.

You can use these delimiters in any search field that contains standard text. The delimiters are supported in Navigator, Quick Search, and List Manager, but not in user selection.

The following table shows some examples of how delimiters can be used when specifying search criteria. The Search operators are available only on text fields and not for drop down or user tree.

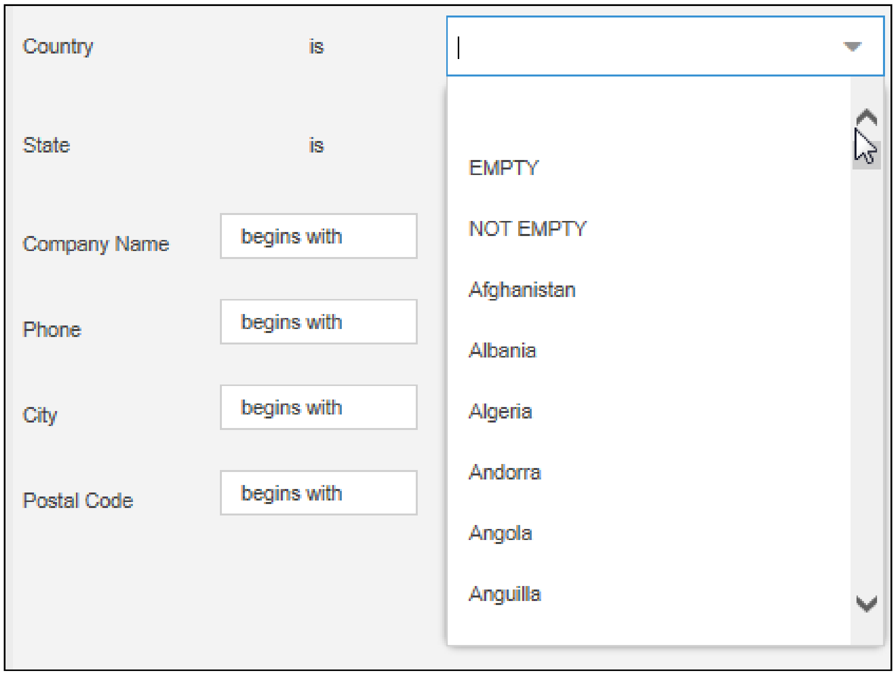
String	Description	Example	Result

String	Description	Example	Result
[/]	Either/or	sm[i/y]th bl[a/o]cksm[i/y]th	Returns records that begin with 'smith' or ' smyth' Returns records that begin with 'blocksmith', 'blacksmith', 'blocksmyth', or 'blacksmyth'
%	A substitute for zero or more characters	%smith	Returns all records that contain 'smith' anywhere in the searched field
[char]	The specified character	[%]	Returns all records containing the '%' character
_ (underscore)	A substitute for exactly one character	_e%	Returns all records where the first character is any character, but the second character is ‘e’
[charlist]	Any single character in charlist	[bsp]	Returns all records starting with b or s or p
[^charlist] or [!charlist]	Any single character not in charlist	[!bsp]	Returns all records, except the ones that start with b, s, or p
- (hyphen)	Range	%[0-9]	Returns all records containing at least one number

Drop-down lists

For fields such as country, state, status, and product, you can select the required values from a drop-down list.

- Click the arrow next to the field to display the drop-down list.



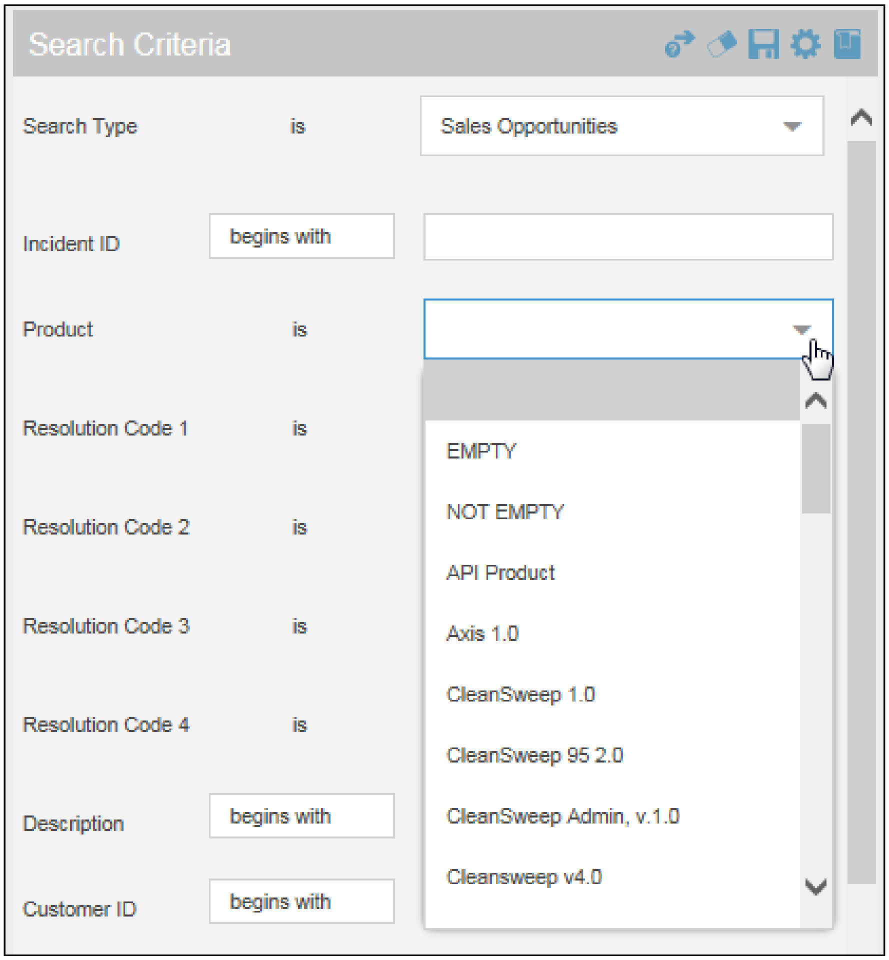
- To select a single value from the list, highlight and click the value.
- To select multiple values from the list,
    - Press the **CTRL** key, and highlight all the values that you want to include in your search.
    - Click the arrow next to the field to confirm your selection and close the drop-down list.
    - To clear a specific value, press the **CTRL** key and select the value you want to clear.
- To clear your selection, click the empty space at the top of the list.

Tree pickers

Tree pickers are provided for fields that contain several levels of data that is organized in folders where each folder can contain any number of items and sub-folders. Tree pickers enable you to quickly find the items you need by navigating to the folder that they belong to.

Currently, the following tree pickers are available in Navigator: Product picker, Script picker, Campaign picker, User picker.

- To display the tree picker, click the arrow beside the field.



- To select a single item from the tree picker, expand the folders and click the required item.
- To select multiple items:
    - Press the CTRL key and highlight all the items that you want to include in your search.
    - To clear a specific value, press the **CTRL** key and select the value you want to clear.

- Click the arrow beside the field to confirm your selection and close the tree picker.

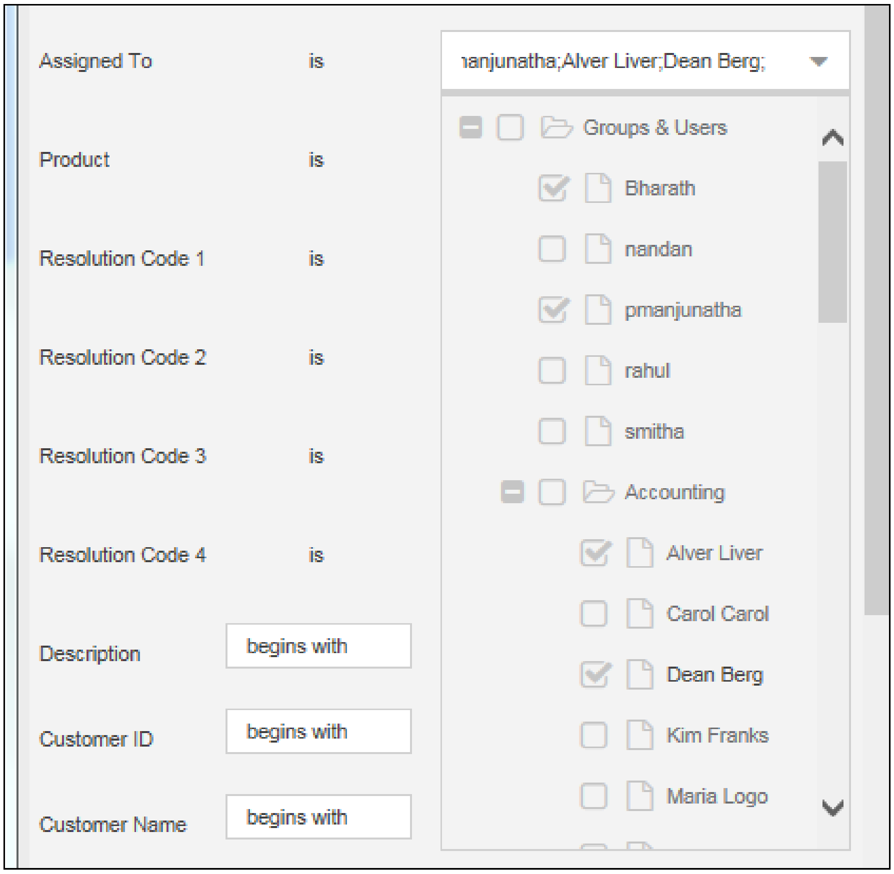
Note: When you select a folder in the tree picker, the tree expands and all the items beneath the selected folder are automatically selected. However, any sub-folders that exist under the selected folder are not selected. To select the sub-folders, you must simultaneously press the **CTRL** key and highlight them.

- To clear your selection, click the empty space at the top of the list.

User pickers

A user picker is a type of tree picker that includes additional features to help you quickly select users for your search.

- To select users, type valid user names, separated by a semi-colon, directly in the text box, and press the **TAB** key. The user ID corresponding to the value you entered is automatically selected. A window appears if there are any unresolved names in the box, enabling you to resolve them manually.
- To display the tree picker, click the arrow beside the field.
- To select a single user from the user picker, expand the folders and click the required user name.
- To select multiple users, Press the CTRL key and select each user that you want to include in your search.
- To select all users within a folder:
    - Click the arrow next to a folder name and expand the folder.
    - Press the CTRL key.
    - Repeat this for all the folders you want to select.
- All the users under the highlighted folder, and under any sub-folders it has, are automatically selected.

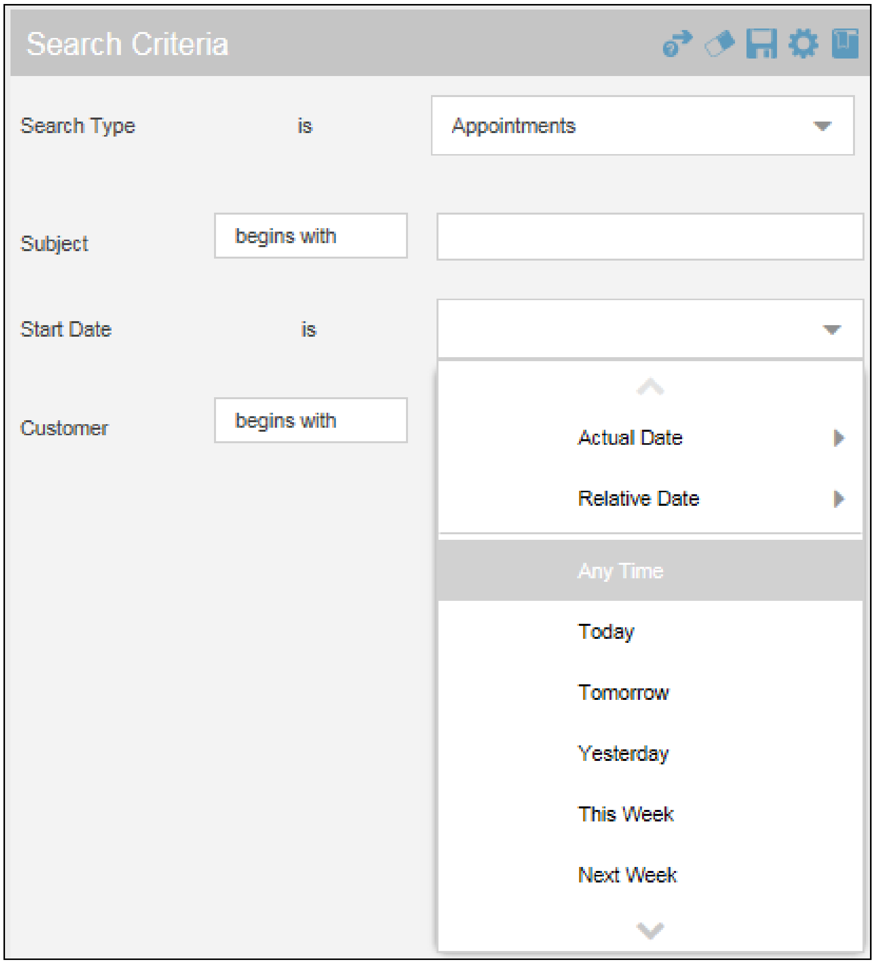


- Click the arrow beside the field to confirm your selection and close the user picker.
- To clear your selection, press the CTRL key and click the selected item again.

Date pickers

Date pickers enable you to quickly select a date range to perform your search. The date picker is a drop-down list with options to filter by relative dates such as Today, This Week, Last Month, Last Quarter, and so on; or by a specific date range.

- To display the date picker, click the arrow beside the field.



- Select a relative date option. The **From** and **To** date range field appears, displaying the dates that correspond to your selection at the time of running the query.
- To enter a specific date range, select either the option **Actual date** or **Anytime**, and enter the desired date range.

Using the OLE Attachment Viewer

The OLE Attachment Viewer is a small application that lets OEP users view attached document files that were uploaded through the OEP - Windows Client application (formerly known as Onyx Customer Center). Because of changes to the way attached files are handled, the OEP Web client cannot handle these files without help from a separate application.

When you click a link to an attachment that was uploaded via the Windows client, the OLE Attachment Viewer appears and locates the application on your computer that is registered for opening the file type of the attachment. If no application on your system is registered to handle the file, Windows creates a list of available applications and invites you to choose one.

The viewer only has the capability to open the files from the server. You cannot add any descriptive information to an attached file that was uploaded using the Windows client.

You can obtain progress information during file download by clicking the **Show Details** button in the main viewer window.

The OLE Attachment Viewer must be installed on your computer by running a special setup program. Contact your system administrator for information on obtaining the installation files for the OLE Attachment Viewer.

Selecting Search Criteria

You can select search criteria either manually on a case-by-case basis or by loading an existing filter with pre-defined criteria.

You can reveal and hide the search criteria pane by clicking and , respectively. Hiding the search criteria pane creates more space for viewing the results list. The search criteria pane contains tabs that when clicked, reveal options specific to the tab.

Click to clear the criteria from all tabs.

Click to search using the selected criteria.

The tabs

To search, you must select at least one record type to be returned in the results list. You can select the record type by clicking the check box on the tab for the desired record type. You can select either a single record type for your search or any combination of record types.

Common tab

The **Common** tab contains items that are applicable to all of the items to be considered for the search. This tab contains options for keywords and date ranges. You can also indicate whether you would like the search to return records where the selected users are contacts for the record.

Keyword: To use keywords in the search, type them into the **Keyword** box. Separate multiple keywords with semi-colons.

Filter By Date: When selecting a date range, you can search on the insert date, update date, or recall date of the records.

- If you are searching by **Actual Dates**, type the full date into the text boxes. To specify a single day, type the same date into both boxes.

- If you are searching by **Relative Dates** for **Insert** or **Update**, set the search date range by selecting the number of days, weeks, or months before the current date as your starting date, and by selecting the number of days, weeks, or months before the current date as your ending date. For instance, if you want to search for records inserted in the previous 5 days, you would enter a **Starting** value of 6 and select **Day(s) Before**, and you would enter an Ending value of 1 and select **Day(s) Before**.
- If you are searching by **Relative Dates** for **Recall**, the same logic applies as for **Insert** and **Update**, except that you can additionally set the search date range by selecting the number of days, weeks, or months after the current date as your starting date and ending date.

Include records where selected users are contacts: This check box changes the way in which the names selected in the user tree are interpreted.

Record type tabs

The remaining tabs represent specific record types including sales opportunities, service requests, support incidents, tasks (including sales, service, and support tasks), work tickets, scripts, and emails. Clicking one of these tabs reveals criteria specific to that record type. Each tab also has a check box that includes the record type in the search. If the box is not selected, the criteria for the tab is ignored and the record type is not retrieved as part of the search. An asterisk (*) appears next to the tab name when there are criteria specified for the tab.

Search criteria for each tab are provided in list boxes that represent data values for the specific record type of the tab (for example, Type, Status, and Priority). You can select one or more criteria from each list box. Use the CTRL key when clicking to select multiple items in a list.

Criteria in the user tree and common tab is not applied to searches for email records. The email tab has its own fields for user links and date information. Date criteria for emails can be selected by clicking dates on a calendar. Click to view the calendar. Today's date is highlighted. To move between months, click the arrow keys in the top corners of the calendar. Click a date in the calendar to select it.

The user tree

You can hide and reveal the user tree by clicking and , respectively.

To identify the users who will be part of the search criteria, select one or more of them from the tree by clicking their names. Users are listed in the tree under group hierarchies. Groups are represented with the icon, and individual users are represented by the icon. Click a group name to include all of its members in the search, or click the names of individual users to include them in the search. A semi-colon delimited list of the selected user names appears in the box above the tree. To deselect a user or group from the search, click the user or group name again. The search retrieves those records that meet the search criteria and which are assigned to the users you select from the user tree.

You can also type user names directly into the **Select Users** box. Press CTRL-K to verify the names you entered. A dialog box appears if there are any unresolved names in the box. See About OEP user selection for more information on locating users by name.

Using filters

Commonly used searches can be saved in filters. Click the name of a filter in the list, and its criteria is automatically applied to the tabs and the user tree.

To save a set of search criteria in a filter:

1. Click next to the filter list.

   The **Save a Filter** dialog box appears.

2. Type a name for the filter or click an existing name in the list.
3. Click to save the filter and close the dialog box.
4. Click to delete the active filter.

Warning: (once with the word 'Modified' in front of the name and once without). To reset the search criteria to the original saved values, click the filter name without the 'Modified' prefix.

Modifying OGS Configuration File

You can define how information is displayed in Navigator and in Onyx Mobile by changing specific settings in the OGS Configuration file. Use this file to specify:

- The system limit for the number of records that are displayed when you run a search in Navigator
- The time limit in milliseconds, after which any request from Onyx Mobile to OGS will time out.

To modify OGS settings:

1. On the OEAS server, navigate to the OnyxGatewayService install location, and open the `OnyxWindowsService.exe.config` file from the location. For example, `<drive>:\Program Files (x86)\Onyx\AppServer\Applications\Onyx\OnyxGatewayService\OnyxWindowsService.exe.config`
2. To change the limit for number of records to display in Navigator, search for the attribute `<add key="MaxRecordsLimit" value="999" />`, and change the value as desired. The maximum system limit corresponds to the maximum possible value for the data type integer, which is 2,147,483,647.
3. To change the time limit for requests from Onyx Mobile, search for the attribute `<add key="RequestTimeOut" value="180000" />`, and change the value as desired. This value represents the time limit in milliseconds.
4. Save the `OnyxWindowsService.exe.config` file.

Administering Navigator

You can determine the fields that users can search by and view in the result grid. You can change field captions to suit your business needs. You can also change the properties for fields that are displayed in the result grid.

The tasks explained in this topic are:

- Navigator Search Criteria Administration
- Navigator Search Result Grid Administration

Customizing Navigator

You can customize Navigator to incorporate the modifications you made to your Onyx system and to enable users to efficiently search for and edit records.

The tasks explained in this topic are:

- About Navigator Search Operators
- Adding Custom Search Type
- Adding Custom Field
- Adding Custom Action Button
- Enabling Inline Editing
- Creating New UI Resource and Granting Permissions
- Making Batch Updates
- Supporting Multiple Languages
- Performing Custom Operations Based on Navigator Queries
- Reference Values
- Summary Pages
- Using Themes in Navigator

Prerequisites

Before you begin customizing Navigator:

- Install and configure Onyx, along with all the optional components that you need.
- Modify the system as desired.
- In the Onyx database, create the objects and table columns that you want to search by in Navigator.

For information on installing and configuring Onyx, see the Onyx Installation Guide.

Adding a sample custom entity

This release contains sample scripts that you can use to add Customers as a custom entity in Navigator. You can also use these scripts as a template to create your own scripts.

The following scripts are available in the Customer Entity folder, available under Customization Support>Database Server>Navigator Custom Entity Scripts within your installation package:

- Customer_navigator_view.sql: Creates the entity view for Customer in the Onyx database.
- Customer_navigator_entity_master.sql: Updates the navigator_entity_master table in the Persistence database.
- Customer_navigator_entity_master_ml.sql: Updates the navigator_entity_master_ml table in the Persistence database.
- Customer_navigator_entity_field_master.sql: Updates the navigator_entity_field_master table in the Persistence database.
- Customer_navigator_entity_field_master_ml.sql: Updates the navigator_entity_field_master_ml table in the Persistence database.
- CustomerUIResources.sql: Creates a new UI resource.

To add Customer as a custom entity:

1. Run the above scripts in the order listed above. This creates the required views in the Onyx database, inserts default data in the Persistence database, and creates UI resources.
2. Modify the Onyx Gateway Service configuration.
3. Modify Result Grid properties.
4. Add a Navigator menu or bookmark item.
5. Enter resource string values.
6. Add custom fields if required.
7. Add a custom action button if required.
8. Enable inline editing if required.

Working with a Results List

A successful search generates a results list that contains items matching the search criteria. The list content is separated by tabs. There is one tab for each item type included in the search (incidents, tasks, and work tickets). Each tab identifies its type by name and indicates the total number of records of that type that were retrieved in the search. To switch between the lists, click the appropriate tab.

For more information on viewing and sorting the records within a Task Manager results list, see Using results lists.

To print a results list, click and OEP recreates the list in a printer-friendly format in a new window. Click in the new window to print the list.

Warning: The width of a printed list often exceeds that of a standard sheet of paper. For best results, configure the printer to use Landscape orientation when printing a results list.

View or edit a single record

Click a row in the list to view or edit an item. The details for that record appear in a new window.

Batch update multiple records

You can edit multiple records at one time. The Batch Update feature enables you to select any number of same-type records from your result list and update one or more specified fields related to that record type. Your update is then applied to all of the records you had selected from the result list.

Select records to update by clicking their check boxes. To select or deselect the entire list, click the check box next to the column headings.

Note: Batch update cannot be used for a list of email records.

When you have selected the records you want to update, click to open the batch update window. The fields you can batch update for a particular record type are displayed with list boxes from which you can select an updated value. You can choose to delete existing data for a field or change the data of a field. The default for each field is to preserve existing data. Depending on the field you are updating, an additional button may be displayed next to the field that when clicked opens an additional search dialog window for selecting the data for the field.

Note: If a field is required, you cannot choose to delete the existing data. You can only update the value or preserve the existing data.

Click to close the batch update window and update the selected records with the changes you made.

Click to clear all changes you made to the fields.

Navigator Search Criteria Administration

For each Search Type available in Navigator, you can limit the fields that will be available to users to perform a search. You can also change the default field names to ones that are better suited to your organization's requirements. These options are available only if you are logged on as a user with administrative privileges.

- Determine available search criteria
- Understanding hierarchical relationships
- Edit a field name

Determine available search criteria

To determine search criteria

1. Open the **Search Criteria Field Selection and Administration** window. To do this, in the Navigator **Search Criteria** window, select a **Search Type**, click .and then click Search Criteria.

   The **Selected** column lists the fields that are currently available to users as default search criteria. These fields display in the **Search Criteria** window when you select the search type. The **Available** column lists the fields that can be included as search criteria. The **Disabled** column lists the fields that cannot be included as search criteria.

2. To make a field available as a search criterion, select and drag it to the **Available** column.
3. To include a field as a default search criterion that displays in the **Search Criteria** window, select and drag it to the **Selected** column.
4. To remove a field as a default search criterion, but to keep it available for users to add, select and drag it to the **Available** column.

5. To completely remove a field as a search criterion, select and drag it to the **Disabled** column.

   Some fields may share hierarchical relationships with other fields. To understand how such fields are moved from one list to another, see Understanding hierarchical relationships.

6. Save your changes or click  to restore the default search criteria, and close the window.

Understanding hierarchical relationships

The search criteria may include fields that are hierarchical, that is, the values in those fields depend upon values entered in other fields. For example, since the values for the field State depend on the value for the field Country, Country is the parent field for the dependent field State. This hierarchy can exist at several levels; therefore, a field can be a parent field as well as a dependent field. For example, in a hierarchy of Resolution Code 1 - Resolution Code 2 - Resolution Code 3, the field Resolution Code 2 is a parent for the field Resolution Code 3, but a dependent for the field Resolution Code 1.

Use the following information to understand how to select hierarchical fields as search criteria:

- When you move a dependent field from the **Disabled** column to the **Available** or **Selected** column, the parent field is automatically moved to the same column as the dependent field.
    - You can move a parent field from the **Disabled** column to the **Available** or **Selected** column without moving its dependent fields.
- When you move a dependent field from the **Available** column to the **Selected** column, the parent field is automatically moved to the **Selected** column.

    - You can move a parent field from the **Available** column to the **Selected** column without moving its dependent fields.

- When you move a parent field from the **Selected** or **Available** column to the **Disabled** column, all its dependent fields are moved automatically to the **Disabled** column.

    - You can move a dependent field from the **Selected** or **Available** column to the **Disabled** column without moving the parent field.

- When you move a parent field from the Selected column to the Available column, all selected dependent fields are moved automatically to the Available column.

    - You can move a dependent field from the Selected column to the Available column without moving the parent field.

Edit a field name

To edit a field name

1. Open the **Edit Field** window. To do this, in the Navigator **Search Criteria Selection and Administration** window, select a field, and click .
2. In the **Caption** box, type the desired name for the selected field.
3. Save your changes and close the window. The **Search Criteria Selection and Administration** window lists the field with the changed name.

Navigator Search Result Grid Administration

For each Search Type available in Navigator, you can limit the fields that users can view in the result grid. You can change the default field names to ones that are better suited to your organization's requirements, and make fields available for inline editing. These options are available only if you are logged on as a user with administrative privileges.

- Determine the fields to display in search results
- Edit result grid field properties
- Modify system limit for records displayed in Navigator

Determine the fields to display in search results

To determine the fields to display in search results

1. Open the **Search Results Field Selection and Administration** window. To do this, in the Navigator **Search Criteria** window, select a **Search Type**, click .and then click Result Columns.
2. The **Selected** column lists the fields that are currently displayed in the **Search Results** window. The **Available** column lists the fields that can be included in the **Search Results** window, while the **Disabled** column lists the fields that are currently not available for selection.
3. To include a field as a selected field, select and drag it to the **Selected** column.
4. To make a field available for users to choose, select and drag it to the **Available** column.
5. To completely remove a field so that it is not available for users to choose, select and drag it to the **Disabled** column.
6. In the bottom pane, select the fields to sort the search results by. The **Sort by** and **Then by** drop-down lists include all the fields from the **Selected** column. You can select up to three fields to sort results by.

7. In the **Maximum Rows** field, enter the maximum number of rows that a search for the selected search type should return from the database. For example, if you enter a value of 100, the search will return the first 100 records that match the criteria you specified.
8. The default value in this field is 300. The maximum value that you can enter depends on the limit set by the system administrator in the OnyxWindowsService.exe.config file. For information on modifying this limit, see Modifying maximum records displayed in Navigator.
9. Save your changes or click to restore the default search criteria, and close the window.

Edit field properties

To edit field properties:

1. Open the Edit Field window. To do this, in the Navigator Search Results Field Selection and Administration window, select a field and click .
2. In the Caption box, type the desired name for the selected field.
3. Select the Editable check box to enable users to edit the field in the result grid. Clear the check box if you do not want to make this field available for inline editing.

! **Important:** Before you enable inline editing for a field, be sure to make the necessary database changes to get the expected results.

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4. Save your changes and close the window. The Search Results Field Selection and Administration window lists the field with the changed name.

About Navigator Search Operators

You can change the default search operator for all Navigator Search Criteria. Use this information to understand the operators that are currently available, and how to set a specific search operator as the default operator.

The task explained in this topic is:

- Navigator Search Operators

Adding Custom Search Type

You can add a new search type (custom entity) in Navigator that enables you to run a search for an object you created in Onyx.

The tasks explained in this topic are:

- Modifying Onyx Gateway Service Configuration
- Inserting Custom Entity Information in Persistence Database
- Inserting Custom Field Information in Persistence Database
- Inactivating an Entity in Persistence Database
- Creating Entity View in Onyx Database
- Modifying Result Grid Properties
- Adding Navigator Menu or Bookmark Item
- Entering Resource String Values

If a custom entity is no longer relevant to your business, you can remove it from Navigator.

Adding Custom Field

A custom field is a search criteria or result grid field that you add to a default or to a custom Navigator search type.

To add a custom field to a Navigator search type, you must:

- Insert Custom Field Information in Persistence Database
- Modify Entity View in Database

To make a field a hyperlink, you must:

- Insert Hyperlink Information in Persistence Database
- Modify Result Grid Properties

If a field is no longer relevant to your business, you can remove it from Navigator.

Adding Custom Action Button

You can add a custom action button to the Navigator Result Grid Action Menu to enable your users to perform specific actions on records that are returned from Navigator searches. You can add multiple custom action buttons for each Navigator search type and define the action for each button. You can also modify the properties of an existing action button.

To add a custom action button:

- Insert data in the Persistence database
- Create a new switch case to implement custom logic for the action
- Create a new UI resource for each custom entity and each action button

If you no longer require an action button, you can remove it from the action menu.

Enabling Inline Editing

You can add inline editing capabilities to a default or a custom field to enable your users to edit records directly in the Navigator Result Grid without having to open the related Onyx page.

To enable inline editing in Navigator:

- Update the relevant tables in the Persistence database
- Make the field available for editing

Creating New UI Resource and Granting Permissions

UI resources enable you to define the actions that your users can or cannot perform. Onyx provides UI resources for all default UI elements, such as entities, fields, and actions buttons. For each custom UI element that you add to your Onyx system, you must create a new UI resource and grant the necessary permissions.

To create a new UI resource:

1. Log on to **OES Security Administration**, and expand **Resources**.
2. In the navigation area, select **UIResources** and click the **Add** button at the top left.
3. In the **Edit Resource** window, type the Resource ID in the specified format, and enter a Description to identify the resource.

   For reference, look for resources with Navigator in the name.

4. Click **Manage Permissions**.
5. In the navigation area expand **Roles**.
6. Select the following roles one by one, and click the **Add** button in the **Edit Resources** window: Administrator, OEP.administrator, OEP.user, and OEP.poweruser.
7. Click **Done** when you've finished adding the desired roles.
8. Click **Save**.
9. Update the relevant table in the Persistence database with the UI resource ID you created.

The tasks explained in this topic are:

- UI Resource Format
- Updating UI Resource in Persistence Database

Making Batch Updates

You can use this feature to update multiple records in Navigator. This facilitates making bulk updates as needed without a need to save each record. This saves time, ensures speed, and a provides an organized method to initiate follow up actions resulting in enhanced customer care.

Note: In Navigator, you can make batch updates only for incidents, work tickets, and tasks provided the proper UI resources are allocated by the Administrator.

The UI resources needed to batch updates are:

#	UI Resources	Description
1	UI:OEP.incident.batchUpdate.service	To Batch Update Services entity
2	UI:OEP.incident.batchUpdate.support	To Batch Update Support entity
3	UI:OEP.incident.batchUpdate.sales	To Batch Update Sales entity
4	UI:OEP.batchupdate.workticket	To Batch Update Work tickets entity
5	UI:OEP.batchupdate.task	To Batch Update tasks entity

Important: Required permissions must be granted In OES by your System Administrator for you to access the above resources before you can make batch updates in OEP.

Requirements

Before you make a batch update, make sure that the following requirements are met with:

- In persistencedb, the **Navigator_entity_field_master** table contains a list of columns for which batch updates can be done.
- For the batch update to be enabled for a field:

- The **is_batch_update** column is set to **1**
  - The **use_type** column is set to **2**.

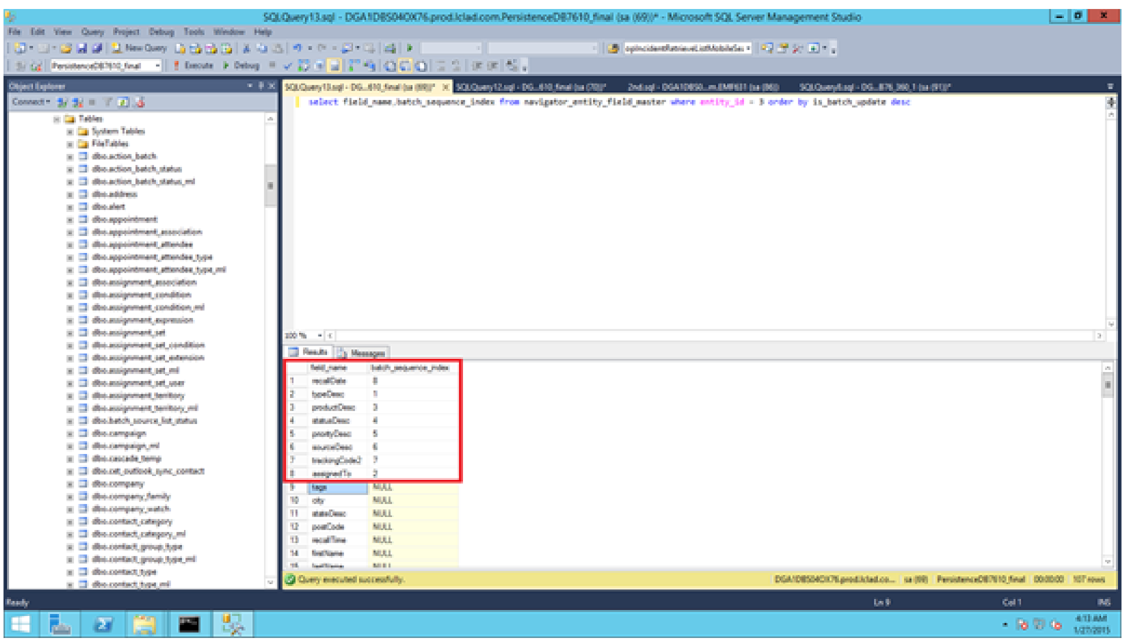
- The **field_state** column should have a value of either 2 or 4.

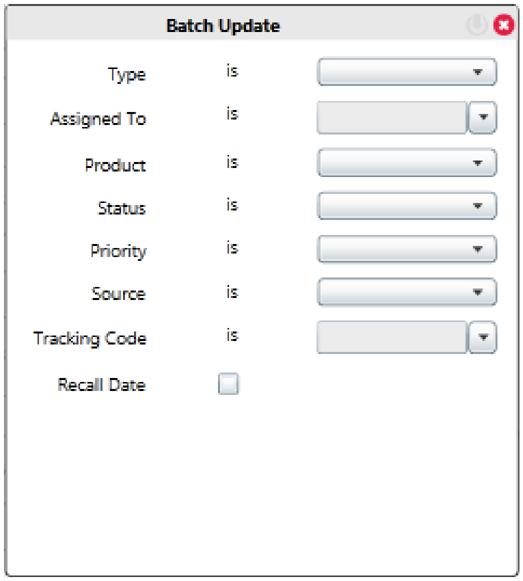
  Where:

  - 2 is indicative of presence in the **Available** column.
  - 4 is indicative of presence in the **Result** grid.

- The order of the fields to be displayed on the **Batch Update** window is controlled by the **batch_sequence_index** column.

  For example, if the **field_name** column is set as per **batch_sequence_index**, **Type** becomes the first entity followed by other entities (sample images are shown below).



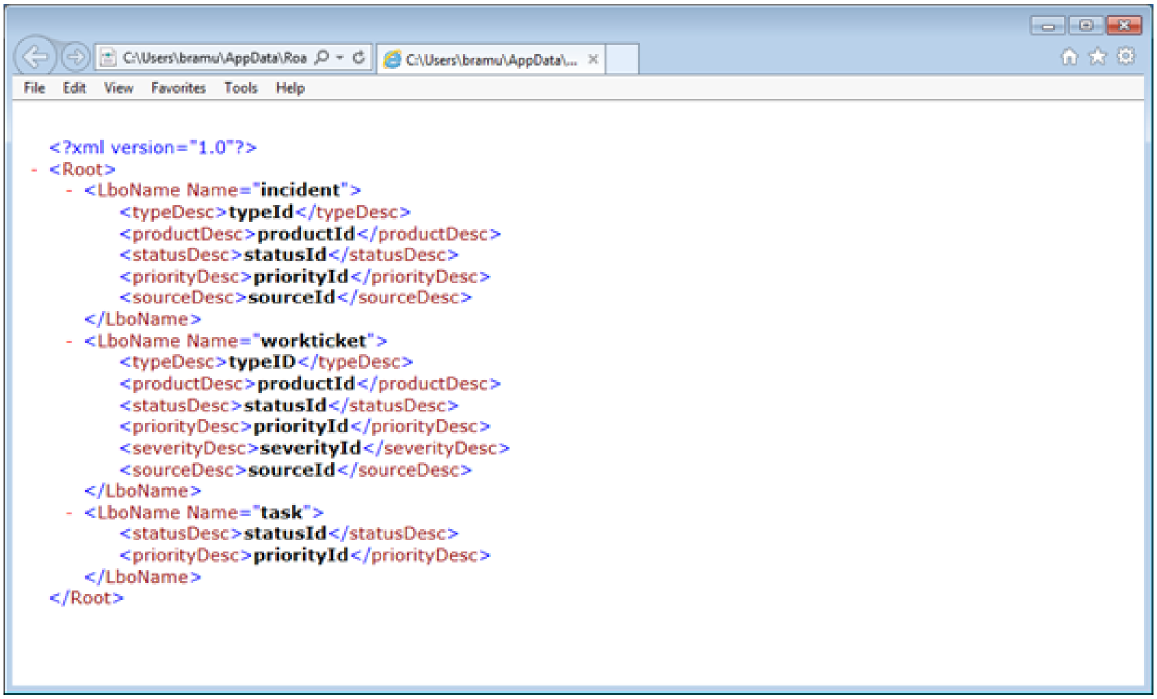


! **Important:** Only the Database Administrator can configure the entity display order, inclusions, or exclusions.

- Batch Update is supported for the following column types:
  - Combo box
  - Drop down
  - Product pick up
  - Text box
  - Date
  - Date range
  - Tree
- To map a particular field name from the **navigator_entity_filed_master** table to a LBO property, mapping needs to be done in the **navigatorbatchupdatemapping.xml** file available in the following folder (**NavigatorProfiles** in OGS configuration).

  C:\program\Files\Onyx\AppServer\Applications\Onyx\OnyxGatewayService\App_Data\NavigatorProfiles

  Example of mapped image:

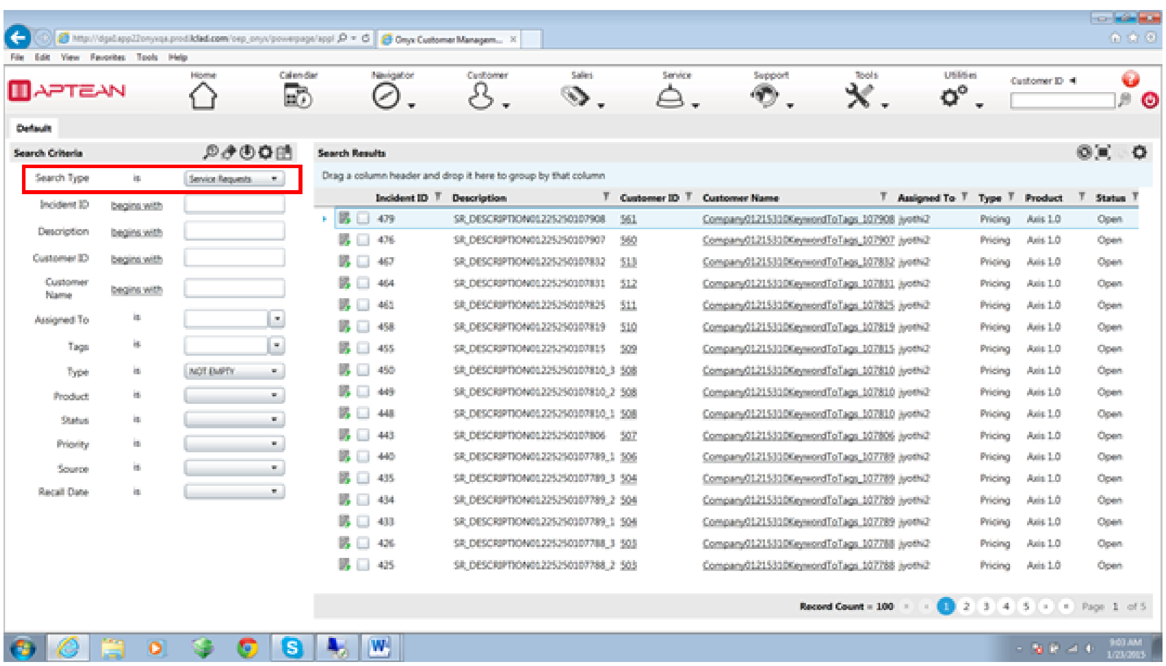


```xml
<?xml version="1.0"?>
- <Root>
  - <LboName Name="incident">
      <typeDesc>typeId</typeDesc>
      <productDesc>productId</productDesc>
      <statusDesc>statusId</statusDesc>
      <priorityDesc>priorityId</priorityDesc>
      <sourceDesc>sourceId</sourceDesc>
    </LboName>
  - <LboName Name="workticket">
      <typeDesc>typeID</typeDesc>
      <productDesc>productId</productDesc>
      <statusDesc>statusId</statusDesc>
      <priorityDesc>priorityId</priorityDesc>
      <severityDesc>severityId</severityDesc>
      <sourceDesc>sourceId</sourceDesc>
    </LboName>
  - <LboName Name="task">
      <statusDesc>statusId</statusDesc>
      <priorityDesc>priorityId</priorityDesc>
    </LboName>
</Root>
```

To make batch updates:

1. Run a query in Navigator for the search type **Service Requests**.

   Example:



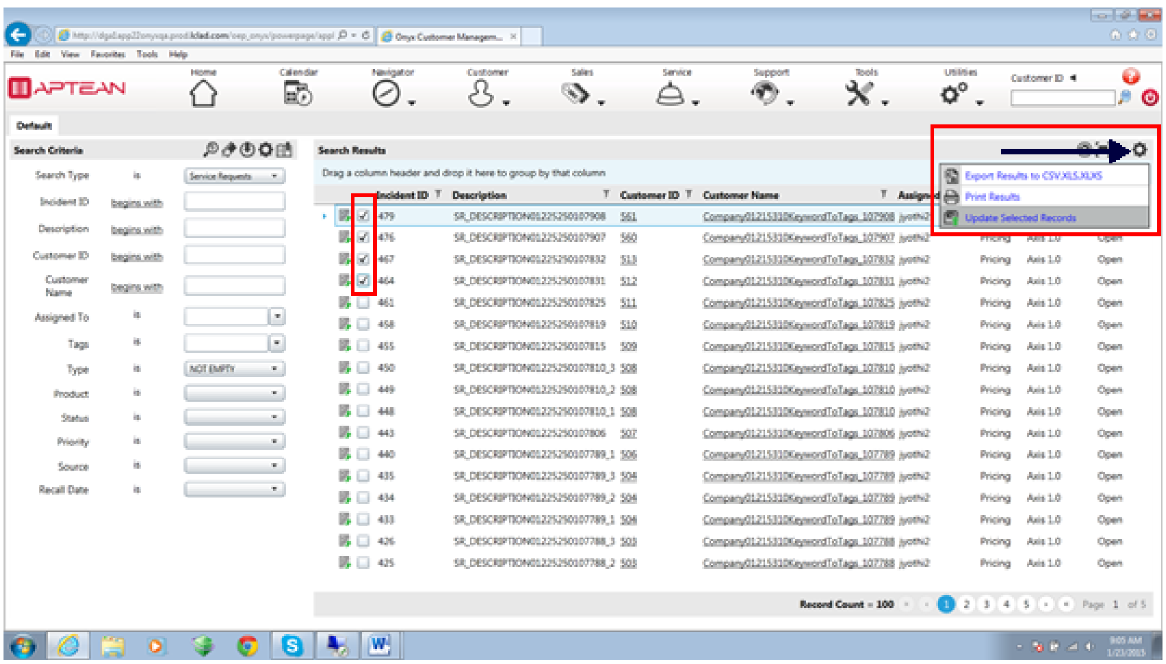
Tips:

- The image is shown for the **Service Requests** option. Follow the same procedures to make batch updates for Sales, Support, Tasks, and Work Tickets.
- Also, you can run queries for other entities similar to **Search Type**. However, any one option among Service Requests, Sales, Support, Tasks, and Work Tickets in **Search Type** must be present before running queries for other entities.

---

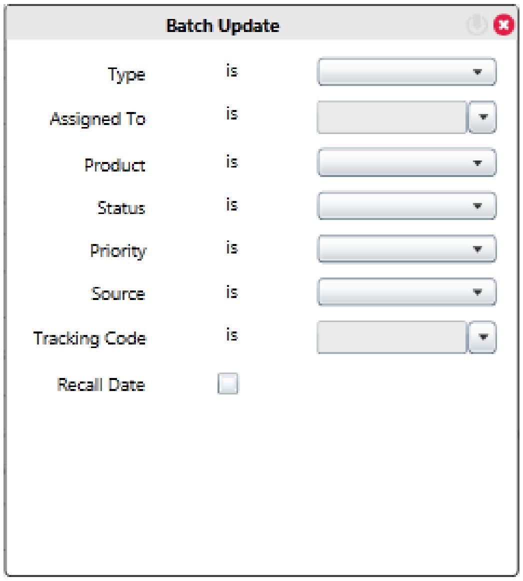
2. Select the check boxes for the required records.

   Example:



3. Click the **Process Selected Records** button, and then **click Update Selected Records**.

   The **Batch Update** window appears.



Note: For Making batch updates for Sales Incidents, the UI Resources explained in the table below must be enabled for the entities to appear. Only the System Administrator can enable the UI Resources.

Enable this UI resource...	To set...
UI:OEP.Navigator.SalesOpportunity.RecallDatePart	Recall date entity
UI:OEP.Navigator.SalesOpportunity.TypeDesc	Type entity
UI:OEP.Navigator.SalesOpportunity.ProductDesc	Product entity
UI:OEP.Navigator.SalesOpportunity.StatusDesc	Status entity
UI:OEP.Navigator.SalesOpportunity.PriorityDesc	Priority entity
UI:OEP.Navigator.SalesOpportunity.SourceDesc	Source entity
UI:OEP.Navigator.SalesOpportunity.TrackingCode2	Tracking code enti
UI:OEP.Navigator.SalesOpportunity.AssignedName	Assigned Name entity
Similarly, UI resources must be set for Service, Support, Work Tickets, and Tasks. The UI resources are available in the **Navigator_entity_field_master** table.	

4. Set your preferences from the listed items against entity or entities. The entities available are explained in the following table.

<table>
<tr><th>Batch Update Window</th><th>Available Entity</th></tr>
<tr><td>Incident (Sales, Service, and Support)</td><td>

Type
Assigned to
Product
Status
Priority
Source
Tracking Code
Recall Date. When selected, the Update and Delete options are displayed.

</td></tr>
<tr><td>Work Tickets</td><td>

Assigned to
Source
Severity
Status
Product
Priority
Version Found
Version Fixed
Version Shipped

</td></tr>
<tr><td>Task</td><td>

Status
Priority
Recall Date
Assigned to

Important: The category of the records should be the same - .Sales, Product Support, or Customer Service. You cannot select multiple category of records for single batch updates. For example, you cannot combine Sales with Product Support.
</td></tr>
</table>

5. Click the **Save** button.
6. The preferences set for the selected records are displayed in the **Result** grid.

Note: Batch Update can also be done on custom column included for various entities, such as Sales, Service, Support Incidents, Tasks, and Work tickets and UI resource can also be allocated for the custom fields.

Supporting Multiple Languages

Navigator is supported on multilingual installations of Onyx in the following topology:

- Single OTDB
- Single OEAS with a single logical application with the default site ID
- A separate installation of OEP for each language

Warning: In the Navigator Results List, the Assigned To field for work tickets and tasks appears blank if the assigned user's language preference is different from the language of the website that you are logged on to. To view the Assigned To user, you must open the record.

To support multiple languages in Navigator, you must perform the following steps for each language that you want to support.

- Modify OTDB to support multiple languages
- Insert language-specific data in the Persistence database
- Localize Onyx Gateway Service error messages
- Localize script status and email priority domain data
- Localize Navigator UI error messages, tool tips, and captions
- Update the configuration file for each website
- Localize Telerik Controls

Modify OTDB to support multiple languages

You must insert language-specific data into the OTDB in order to support multiple languages. For information on doing this, see **Customize Database (OTDB)**.

Important: The language code that you create for each language is case-sensitive. Be sure to enter the language code throughout Onyx using the same case as in the OTDB Language table.

Insert language-specific data in the Persistence database

In the Persistence database, domain data is contained in two types of tables: language-independent tables, and language-dependent tables. You must update both these types of tables with data for each language that you intend to support.

To update the Persistence database tables:

1. Ensure that you have synchronized the OTDB and Persistence database so that the latest domain data is available in the Persistence database. For information on doing this, see the Onyx Installation Guide.
2. In each language-dependent table, create one row of domain data for each language code.

   For example, in the navigator_entity_master_ml table, create one row for 'Companies' with language code=ENG. Create another row for 'Société' with language code=FRA, and so on for each language code that you have created.

Localize Onyx Gateway Service error messages

To update error messages that are controlled through the Onyx Gateway Service , you must modify the NavigatorMessages.txt file with the language-appropriate text, and then create a DLL for each language. Before you begin, be sure to have a list of the culture names for each language in which you want to localize Navigator. Perform this process on a computer that has Microsoft Visual Studio 2010 installed.

Note: To find the culture name for a language, refer to http://msdn.microsoft.com/en-us/library/system.globalization.cultureinfo(v=vs.80).aspx

---

To create the resources DLL:

1. In your Onyx installation package, navigate to **\Customization Support\CRArchitecture\CMRestGateway**, and copy the NavigatorMessages.txt file to a computer on which you have installed Microsoft Visual Studio 2010.
2. Open **.NET SDK Command Prompt** and perform the following steps:

   - Enter a command to point to the directory where you copied the NavigatorMessages.txt file.
   - Execute the following command, substituting the bracketed text with the appropriate values. This converts the NavigatorMessages.txt file into a .resources file.

     ```
     resgen NavigatorMessages.txt NavigatorMessages.
     <culture-name>.resources
     ```

     An example of the command: resgen NavigatorMessages.txt NavigatorMessages.ja-jp.resources

   - Execute the following command, substituting the bracketed text with the appropriate values. This creates the required DLL.

     ```
     al /t:lib /embed:NavigatorMessages.<culture-
     name>.resources /culture:<culture-
     name>/out:NavigatorMessages.resources.dll
     ```

     An example of the command: >al /t:lib /embed:NavigatorMessages.ja-jp.resources /culture:ja-jp /out:NavigatorMessages.resources.dll

3. On the **OEAS server computer**, navigate to **C:\Program Files (x86)\Onyx\AppServer\Applications\Onyx\OnyxGatewayService**
4. Create one folder for each language, and name it with the culture name, such as ja-jp for Japanese.

Note: When no language-specific dll is present, the culture-neutral dll is used to retrieve error messages..The default location for the culture-neutral dll is C:\Program Files (x86)\Onyx\AppServer\Applications\Onyx\OnyxGateway Service\NavigatorMessages.dll.

---

5. Copy the DLL for each language into the respective language folder.
6. In an editor such as Notepad, open the **CMGateway config.exe** file.
7. Find the text **Configuration\AppSettings**, and type text in the following format, substituting the bracketed text with the appropriate values.

```
<add key="<CM-Language-Code>" value="<.net-
culture-name>"/>
```

   An example of the text: <add key="JPN" value="ja-jp"/>

8. Save and close the configuration file.
9. To modify an error message, make the necessary modifications in the **NavigatorMessages.txt** file, recreate the DLL, and copy it to the appropriate language folder, following the steps listed above.

! **Important:** Be sure to back up the modified .txt file. You will need it when you want to make further modifications and when you want to upgrade to a newer version of Onyx.

Localize Email Priority and Script Status domain data

You must also modify the XML files for Email Priority and Script Status to include domain data in each language that you want to support.

1. On the OEAS server, navigate to the app_data folder within your Onyx Gateway Service install folder. The default location for this folder is **C:\Program Files**

(x86)\Onyx\AppServer\Applications\Onyx\OnyxGatewayService \App_Data.

2. Open the EmailPriorityDomainData.xml file, and add the domain data for Email Priority in each language that you want to support. The domain data in the default installation language is already present and does not need to be added.
3. After you've finished adding the data, save and close the file.
4. Open the ScriptStatusDomainData.xml file, and add the domain data for Script Status in each language that you want to support. The domain data in the default installation language is already present and does not need to be added.
5. After you've finished adding the data, save and close the file.

Localize Navigator UI

In a Onyx language pack, the Navigator.Resources.dll file and the Navigator Config.xml file are localized by default in the corresponding language. Perform the following steps only if you want to further modify these files.

Captions, tool tips, and error messages

Several captions, tool tips, and error messages used in Navigator are stored on the OEP server computer in the Navigator.Resources.dll. The default location for this file is C:\Program Files (x86)\Onyx\EmployeePortal\QuickSearch\ClientBin. To modify these strings, see Entering resource string values.

Update the configuration file

1. On the OEP server computer for each language installation, navigate to the Configuration folder within the OEP installation folder. The default location for this folder is **C:\Program Files(x86)\Onyx\EmployeePortal\CRArchitecture\Configuration**.
2. Using a text editor such as Notepad, open the Config.xml file.
3. In the node **add.baseAddress**, add the installation language code of the website in the following format: "http://<Fully qualified ComputerName>:69/ServiceGateway/"language="languagecode"/>

```
<services>
 <service name="CmService.Client">
  <host>
   <baseAddresses>
    <add
baseAddress="http://123.xyz.com:69/ServiceGatewa
y/"language="ENG"/>   </baseAddresses>
  </host>
 </service>
</services>
```

! **Important:** Be sure to enter the language code using the same case as in the OTDB Language table.

4. Save the Config.xml file.
5. On the OEP client computer, clear the temporary internet files and browser cache.

Localize Telerik Controls

In a Onyx language pack, the Telerik.Resources.dll file is localized by default in the corresponding language. Perform the following steps only if you want to further modify these files.

Grid view and Data pager controls

The Grid view and data pager controls resources used in Navigator are stored on the OEP server computer in the Telerik.Resources.dll. The default location for this file is C:\Program Files (x86)\Onyx\EmployeePortal\QuickSearch\ClientBin. To modify these strings, see Update resource string values.

Update the configuration file

1. On the OEP server computer for each language installation, navigate to the Configuration folder within the OEP installation

folder. The default location for this folder is **C:\Program Files(x86)\Onyx\EmployeePortal\CRArchitecture\Configuration**.

2. Using a text editor such as Notepad, open the Config.xml file.
3. In the node **add.baseAddress**, add the installation language code of the website in the following format: "http://<Fully qualified ComputerName>:69/ServiceGateway/"language="languagecode"/>

```
<services>
  <service name="CmService.Client">
    <host>
      <baseAddresses>
    <add
baseAddress="http://123.xyz.com:69/ServiceGatewa
y/"language="ENG"/>
    </baseAddresses>
   </host>
  </service>
</services>
```

! **Important:** Be sure to enter the language code using the same case as in the OTDB Language table.

---

4. Save the Config.xml file.
5. On the OEP client computer, clear the temporary internet files and browser cache.

Performing Custom Operations Based on Navigator Queries

When users run queries on Navigator, the following metadata is sent to the OTDB:

- User Id
- Site Id
- Language
- Application Name
- Entity Id
- Session Id

You can use this information to perform further custom operations, based on your business needs. Some examples of custom operations are:

- Maintaining an audit log for all queries run
- Performing actions on linked database servers before executing a query
- Restricting certain types of data from being displayed, depending on the user profile
- Modifying 'where' conditions based on user role

To define the custom operations that you want to run, modify the opSearchQueryExecute stored procedure on the OTDB. Each time a user runs a Navigator query, the custom operations that you defined in the stored procedure are performed.

To define custom operations:

1. In SQL Server Management Studio, navigate to the OTDB, and go to Programmability>Stored Procedures.
2. Select dbo.opSearchQueryExecute, right-click, and select Script Stored Procedure as>ALTER To, and click New Query Editor Window.
3. Add the script that will perform your custom operation.

4. Execute the query.

Reference Values

Use this information to quickly find values for certain columns in the Persistence database.

- Entity IDs and entity views
- Data type
- Control type
- Field state
- Cache name
- Reserved field names
- Reserved entity names
- Example Data for Custom Entity Tables
- Example Data for Custom Field Tables
- Example Data for Custom Action Tables
- Example Data for Inline Editing Tables

Entity IDs and entity views

The following table lists the default entities available in Navigator, with the entity ID and the name of the respective entity view in the Onyx database.

In the entity view, each field included in the view is represented in the format [TableAlias].[field_name] AS [FieldAlias]. For example, c.company_id AS primaryId, where the field_name company_id from the Company table is displayed as the primary ID.

Entity ID	Entity Name	View Name
1	Company	company_navigator_view
2	Individual	individual_navigator_view
3	SalesOpportunity	incident_sales_navigator_view
4	ServiceRequest	incident_service_navigator_view
5	SupportIncident	incident_support_navigator_view
6	WorkTicket	workticket_navigator_view
7	Email	email_navigator_view
8	Task	task_navigator_view
9	Appointment	appointment_navigator_view

Entity ID	Entity Name	View Name
10	Script	script_navigator_view
11	Forecast	forecast_navigator_view
12	Product	product_navigator_view
13	Document	Document_navigator_view

Data type

The following table lists the data type options available for Navigator fields.

Data type	Description	Comment
BIT	True or false type of values	
CHAR255	Text values	
DATETIME	Date and time related information	If the field appears in the Navigator Result Grid, meaning that the value in the use_type column for the field is 2, enter DateRange as the value in the Control_Type column. This ensures that when the field is enabled for editing, the Date Picker control appears, allowing users to select a date. LONGTIME SHORTTIME SHORTDATE LONGDATE SHORTDATETIME LONGDATETIME SHORTDATELONGTIME LONGDATESHORTTIME

Data type	Description	Comment
FLOAT	Decimal Values	If the field appears in the Navigator Result Grid, meaning that the value in the use_type column for the field is 2, enter Float as the value in the mask_format column. This ensures that when the field is enabled for editing, the data is validated based on the requirements for the Float type.
INTEGER	Integer values	If the field appears in the Navigator Result Grid, meaning that the value in the use_type column for the field is 2, enter Integer as the value in the mask_format column. This ensures that when the field is enabled for editing, the data is validated based on the requirements for the Integer type.

Control type

The following table lists the control type options available for Navigator fields.

Control Type	Section	UI Control
Hidden	Search Criteria and Result Grid	Use this option for required fields that will not be visible in Navigator.
TextBox	Search Criteria and Result Grid	Use this option for Text box fields.
DateRange	Search Criteria and Result Grid	Use this option for date fields.
Tag Picker	Search Criteria and Result Grid	Use this option for the Tag field.

Control Type	Section	UI Control
DropDown	Search Criteria	Use this option for combo box drop-downs in the Search Criteria panel.
CampaignPicker	Search Criteria	Use this option for the Campaign field.
ProductPicker	Search Criteria	Use this option for the Product field.
ScriptPicker	Search Criteria	Use this option for the Script field.
UserPicker	Search Criteria	Use this option for the User field.
UserGroupPicker	Search Criteria	Use this option for the User Group or User field.
ComboBox	Result Grid	Use this option for fields in which you can type or select from a list in the Result Grid window.
MaskEdit	Result Grid	Use this option for fields where you want to control how information should be displayed. Specify a mask in the 'mask_format' field.
TreeSearch	Result Grid	Use this option for fields in which you can select values from a tree.

Field state

The following table lists the state ID for Navigator fields.

State ID	List box in Search Filter and Search Result Administration window
0	Non usable
1	Disabled
2	Available
3	Selected
4	Result Grid Header field
5	Result Grid Detail field

State ID	List box in Search Filter and Search Result Administration window
6	Fields containing unique information that distinguishes one record from another. Example: primaryId. This is the value for all fields that are set as Required fields in the corresponding Logical Business Object (LBO).

Cache name

The following table lists the cache name for Navigator fields.

Cache Name	Bind To Control	UI Control
attachment.category	DropDown	Multi-select combo box
attachment.owner	DropDown	Multi-select combo box
company.keyword	DropDown	Multi-select combo box
company.marketsector	DropDown	Multi-select combo box
company.sic	DropDown	Multi-select combo box
company.source	DropDown	Multi-select combo box
company.status	DropDown	Multi-select combo box
company.subtype	DropDown	Multi-select combo box
company.type	DropDown	Multi-select combo box
country	DropDown	Multi-select combo box
email.draft	DropDown	Multi-select combo box
email.followup	DropDown	Multi-select combo box
email.priority	DropDown	Multi-select combo box
forecast.forecast.probability	DropDown	Multi-select combo box
gender	DropDown	Multi-select combo box
incident.priority	DropDown	Multi-select combo box
incident.sales.code1	DropDown	Multi-select combo box
incident.sales.code2	DropDown	Multi-select combo box

Cache Name	Bind To Control	UI Control
incident.sales.code3	DropDown	Multi-select combo box
incident.sales.code4	DropDown	Multi-select combo box
incident.service.code1	DropDown	Multi-select combo box
incident.service.code2	DropDown	Multi-select combo box
incident.service.code3	DropDown	Multi-select combo box
incident.service.code4	DropDown	Multi-select combo box
incident.source	DropDown	Multi-select combo box
incident.status	DropDown	Multi-select combo box
incident.support.code1	DropDown	Multi-select combo box
incident.support.code2	DropDown	Multi-select combo box
incident.support.code3	DropDown	Multi-select combo box
incident.support.code4	DropDown	Multi-select combo box
incident.type	DropDown	Multi-select combo box
incident.workticket.code1	DropDown	Multi-select combo box
incident.workticket.code2	DropDown	Multi-select combo box
incident.workticket.code3	DropDown	Multi-select combo box
incident.workticket.code4	DropDown	Multi-select combo box
individual.department	DropDown	Multi-select combo box
individual.keyword	DropDown	Multi-select combo box
individual.source	DropDown	Multi-select combo box
individual.status	DropDown	Multi-select combo box
individual.subtype	DropDown	Multi-select combo box
individual.title	DropDown	Multi-select combo box
individual.type	DropDown	Multi-select combo box
product	Product picker	Multi-select tree picker

Cache Name	Bind To Control	UI Control
product.source	DropDown	Multi-select combo box
product.status	DropDown	Multi-select combo box
region	DropDown	Multi-select combo box
sales.keyword	DropDown	Multi-select combo box
sales.product	DropDown	Multi-select combo box
salestask.keyword	DropDown	Multi-select combo box
script	Script picker	Multi-select tree picker
script.status	DropDown	Multi-select combo box
service.keyword	DropDown	Multi-select combo box
service.product	DropDown	Multi-select combo box
servicetask.keyword	DropDown	Multi-select combo box
support.keyword	DropDown	Multi-select combo box
support.product	DropDown	Multi-select tree picker
supporttask.keyword	DropDown	Multi-select combo box
task.category	DropDown	Multi-select combo box
task.keyword	DropDown	Multi-select combo box
task.priority	DropDown	Multi-select combo box
task.status	DropDown	Multi-select combo box
task.type	DropDown	Multi-select combo box
trackingcode	Campaign picker	Multi-select Tree picker
users	DropDown	Multi-select combo box
workticket.keyword	DropDown	Multi-select tree picker
workticket.priority	DropDown	Multi-select combo box
workticket.product	DropDown	Multi-select combo box
workticket.severity	DropDown	Multi-select combo box

Cache Name	Bind To Control	UI Control
workticket.source	DropDown	Multi-select combo box
workticket.status	DropDown	Multi-select combo box
workticket.type	DropDown	Multi-select combo box

Reserved field names

The following table lists the values that you cannot use to refer to custom fields in the Onyx database view and in the field_name column of the navigator_entity_field_master table.

Reserved field names	Reserved field names	Reserved field names	Reserved field names
Append	folderId	moduleId	queryType
appName	folderName	navigatorEntity	remarks
authMode	group	objectTypeEnum	Rename
Begin	isBookmark	parameter	resourceId
categoryID	IsEditable	parentFolderId	Rollback
columns	ishomePageQuery	parentId	rowIndex
Commit	lang	Password	SequenceIndex
countryId	lboId	plpToken	siteID
Create	lboMethod	profileId	SortOrder
credential	listDescription	protectionMode	timeZoneOffset
Delete	listDomain	queryId	transactionHandle
DisplayName	listName	queryMode	transactionType
FieldID	MaxRecords	queryName	Update
FieldState	mode	queryParameter	userId

Reserved entity names

The following table lists the values that you cannot use for custom entities that you create.

Reserved Entity Names	Reserved Entity Names	Reserved Entity Names
ApplicationConfiguration	Forecast	Query
Appointment	GridActionMenu	QueryGroup
Authenticate	HelperMethod	Reminder
Common	Individual	RuntimeObjectBuilder
Company	JsonWriter	SalesOpportunity
Customer	LboConfiguration	Script
CustomerManagement	ModelClasses	SecurityPolicy
CustomerManagementExtended	OtmDispatcher	ServiceRequest
DomainData	OTMInteropException	ServiceRequestInspector
DomainDataSynchronizer	PersonalList	Session
Email	PrintEngine	SupportIncident
Entity	Product	Task
Fault	ProfileManager	WorkTicket

Summary Pages

Summary pages in Navigator are read-only pages that display essential information for a record selected in Navigator. They provide links to view, add, and modify information about the record.

Company Summary page

The Company Summary page includes name, address, phone, email, and primary contact information for company records. It also provides links to view company contacts and incidents. Users can email a company, open the company website, and access incident, task, and other records associated with the company record.

Individual Summary page

The Individual Summary page includes name, address, phone, email, and parent company information for individual records. It also provides links to view individual contacts and incidents. Users can email an individual, open the individual website, and access incident, task, and other records associated with the individual record.

Incident Summary page

The Incident Summary page includes incident ID, description, priority, status, and primary contact information for incident records. It also provides links to view tasks and work notes associated with incidents. Users can open the owner and primary contact pages, email the primary contact, and access tasks associated with the incident record.

The tasks explained in this topic are:

- About XML Files
- Configuring Summary Pages

Using Themes in Navigator

Use themes to customize the look and feel of several screens in the Onyx Interface. Choose from a set of predefined tags that specify style, font and color. Using a theme you can determine the appearance of a particular user interface. The various pages in the Onyx application that can be personalized are:

- Customizing Themes in Navigator
- Customizing Themes in Login Page
- Customizing Themes in Home Page
- Customizing Themes in Notification Page

Prerequisites to enable theming in the Onyx application

- Visual Studio 2012
- Silverlight 5.0 SDK
- .Net Framework 4.5
- Telerik Controls Licensed version

Note: Telerik Control Licensed version is required only if you wish to customize the NavigatorTheme.dll.

Navigator Search Operators

The following is the list of Navigator search operators and the corresponding codes and values from the navigator_operator table in Persistence database.

operator_code	operator_description	operator_value
LKE	Begins With (%)	%
ISN	Is Empty (ET)	ISN
ISNN	Is Not Empty (NE)	ISNN
EQ	Equals To (=)	=
NEQ	Not Equal To (<>)	<>
GT	Greater Than (>)	>
LT	Less Than (<)	<
GE	Greater or Equals To (>=)	>=
LE	Lesser Or Equals To (<=)	<=
BTWN	Is Between (-)	-
IN	IN	IN

Modifying Onyx Gateway Service Configuration

To modify the Onyx Gateway Service configuration:

1. On the **OEAS** server, stop the **Onyx Gateway Service**.
2. Back up the **Onyx Gateway Service installation** folder and all its contents. The default installation path is C:\Program Files (x86)\Onyx\AppServer\Applications\Onyx.
3. In the OGS installation folder, double-click **CustomEntityHelper.exe**.

   The **Custom Entity Helper** window appears.

4. In the **Entity Name** box, type a name for the custom entity that you want to create. Ensure that the value you enter here matches the value you enter in the **entity_name** field of the **navigator_entity_master** table.
5. Click the **Create Entity** button. This creates a file in the OGS folder with the name <EntityName>.dll, where <EntityName>is the name you entered.
6. After you have created all the entities that you want to use, recreate the CMService.dll to include the new entities.

   i. In the **All Custom Entity Names** box, enter all the existing custom entity names, separated by commas.

   ! **Important:** Recreating the CMService.dll removes all previously created custom entities, so you must enter all the custom entity names created so far each time you recreate the CMService.dll.

   ---

   ii. Verify that one <EntityName>.dll file exists for each custom entity name that you entered in the box.

   iii. Click the **Create CMService** button to recreate the CMService.dll including all the custom entities.

7. From the Onyx Gateway Service folder, open the Onyx Gateway Service configuration file, and search for the comment.‘<!—insert custom entity endpoints here -->’.
8. Insert the following endpoint node under the comment ‘<!—insert custom entity endpoints here -->’, where <EntityName>is the value you entered for the entity in step 4.

```
<endpoint
address="ServiceGateway/<EntityName>/"binding="
webHttpBinding"
contract="CmService.Service.I<EntityName>"/>
```

9. Start **Onyx Gateway Service**.
10. Verify the configuration to test that the custom entity is being called. To do this, in **Microsoft Internet Explorer**, type the following URL, replacing <entity-name>with a custom entity name you created.

```
http://<app-server-
name>:69/ServiceGateway/<entity-name>/Search/?
```

Onyx should return an error message in the following format, indicating that the call was successful, but that the search failed due to a lack of additional parameters.

```
<returnXml>
<methodStatus>
<statusType>failure</statusType>
<error>
<title>Navigator</title>
<caption>Custom Entity search failed</caption>
<messageHandle>00000000-0000-0000-0000-
000000000000</messageHandle>
<severity>failure</severity>
<dialog moreButton="False" />
</error>
</methodStatus>
</returnXml>
```

Inserting Custom Entity Information in Persistence Database

After creating the view for the custom entity, update the corresponding tables in the Persistence database. Read a description and see example values for each table that needs to be modified.

To insert custom entity information in the Persistence database:

1. In the **Persistence** database, right-click the **navigator_entity_master** table and select **Edit Top 200 Rows**.
2. Scroll to the bottom of the displayed result grid, and insert one row for the entity that you created a view for.
3. Select the **navigator_entity_master_ml** table and repeat steps 1 and 2.

Inserting Custom Field Information in Persistence Database

Update the Persistence database with information for each field of each entity that you want to view in the Search Criteria and Search Results windows. Additionally, you must also enter information for each field that is marked as Required for the Logical Business Object corresponding to the entity. Read a description and see example values for each table that needs to be modified.

To insert custom field information in the Persistence database:

1. In the **Persistence** database, right-click the **navigator_entity_field_master** table and select **Edit Top 200 Rows**.
2. Scroll to the bottom of the displayed result grid.
3. Insert one row for each field that you want to add as a Search Criteria in Navigator.
4. Insert one row for each field that you want to add as a Result Grid column in Navigator.

> **Note:** For a field to appear both as a search criterion and as a result grid column, insert two distinct rows for the field.

5. Insert one row for each field that is marked as Required for the Logical Business Object (LBO). For these fields, enter the value TRUE in the is_transaction column, the value 2 in the use_type column, and the value 0 in the field_state column of the navigator_entity_field_master table.

> **Note:** Do not add a separate row if you've already added a row to include the field as a Result Grid field. However, ensure that you enter the value TRUE in the is_transaction column for such a field.

6. Insert two rows for the field primaryId with the value TRUE in the is_transaction column and the value 0 in the field_state column. In the use_type column, enter the value 0 in one row, and the value 2 in the second row.
7. Right-click the **navigator_entity_field_master_ml** table, and repeat steps 2 to 7 above.

! **Important:** Every field that you add to these tables must also exist in the corresponding view.

Inactivating an Entity in Persistence Database

You can inactivate an entity if it is no longer required. An inactive entity or field is not available in Navigator to perform a search.

To inactivate an entity:

- In the **navigator_entity_master** table in the **Persistence** database, set the value for the **IsActive** field for the search type to 0.

Creating Entity View in Onyx Database

Create the entity view in the Onyx database to include the custom object and fields. For a list of the default views available in the Onyx database, see to Entity Views.

To create an entity view:

1. In the **Onyx database**, identify the object for which a view needs to be created. You can select an existing object or create a new object.
2. Create a view for the object.

   Include in the view, all the fields that you want to use in the Search Criteria and the Result Grid areas of Navigator. Also include all fields that are required fields for the Logical Business Object (LBO). Ensure that you include languageCode as a field in each view that you create.

3. If you are adding a reference field to the view, you must include one more line in the view, in the following format:

   [ReferenceTableAlias].[field_name] AS [FieldAlias]Sort

   This will enable the selected Sort By option to be saved when the query is saved.

4. Execute the newly created view against the Onyx database.
5. Be sure that the newly created view has **Select Grant** permission for the **OnyxLMViews** role.

Modifying Result Grid Properties

You must modify the Navigator Result Grid properties for a custom entity to ensure that the corresponding page opens when you click a column in the Navigator Result Grid.

To understand the process that occurs when a user clicks a column in the Navigator Result Grid, see Opening a page from the Navigator Result Grid.

To modify result grid properties:

1. Create a new switch case in the JavaScript function for the Custom Entity with two actions, one for a hyperlinked column, and one for a non-hyperlinked column.
2. Get all the required parameters to be passed.
3. Call the function to open the CM page of custom entity/object and pass the required parameters, if any.

Example of a switch case for an entity ‘Customers’

```
case "CUSTOMERS":

//Check whether the request is from a hyperLink
field or normal field

if (bHyperLink != "") {

var sCustomerId;

var sCustomerType;

if (bHyperLink == "true") {

if (oRootNode.selectSingleNode("customerId") !=
null)

sCustomerId =
oRootNode.selectSingleNode("customerId").text;

if (oRootNode.selectSingleNode("customerType")
!= null)

sCustomerType =
oRootNode.selectSingleNode("customerType").text;

if (sCustomerId != "")
```

```
jsLoadObjectCustomer(sCustomerId, sCustomerType,
"");}
else if (bHyperLink == "false") {
if (oRootNode.selectSingleNode("customerType")
!= null)
sCustomerType =
oRootNode.selectSingleNode("customerType").text;
if (sPrimaryId != "")
jsLoadObjectCustomer(sPrimaryId, sCustomerType,
"");
}
}
break;
```

Opening a page from the Navigator Result Grid

The page that opens when you click a column in the Navigator Result Grid depends on whether the column is hyperlinked or not.

- If the column is hyperlinked, then the hyperlinked page opens.
- If the column is not hyperlinked, then the corresponding entity page opens.

For example, for the Product entity, a column Customer in the result grid is a hyperlinked column. If a user clicks the Customer column, then the Customer page should open. However, if a user clicks any other column in the Result Grid, then the Product page should open.

The following processes occur when a user clicks a column in the Result Grid:

1. XML is generated with the root element and all the properties of the selected entity.

    - When a user clicks a hyperlinked column, the hyperlinked entity is the root element in the XML.

For example, Customer

```
<Customer>- root element
  <Element1>value</Element1>
  <Element2>value</Element2>
  <Element3>value</Element3>
  <Element4>value</Element4>
  <Element5>value</Element5>
</Customer>
```

- When a user clicks a non-hyperlinked column, the selected entity is the root element in the XML.

For example, Product

```
<Product>- root element
  <Element1>value</Element1>
  <Element2>value</Element2>
  <Element3>value</Element3>
  <Element4>value</Element4>
  <Element5>value</Element5>
</Product>
```

This XML is passed as a parameter to the function ‘jsOpenEntity (entity)’. The default path for this file is C:\Program Files (x86)\onyx\employeeportal\powerpage\application_main.js

The function performs the following actions:

- Loads the XML
- Gets the Entity Object
- Gets the Entity Name
- Gets the common Parameter (generally the ‘primaryId’ of the object)
- Checks the value of the ‘HyperLink’ attribute
- Uses the switch case logic for each entity, to make a call to the appropriate function to open the corresponding page

Note: In the **Navigator Results List Administration** window, if you change the order and position of fields, your sorting preferences may be lost.

Adding Navigator Menu or Bookmark Item

You must modify the configuration file to add the custom entity as a menu or bookmark item to the Navigator menu on the Onyx navigation bar.

To add a custom entity as a menu or bookmark item:

1. On the OEPserver, navigate to **C:\Program Files (x86)\Onyx\EmployeePortal**, and open the **Config.xml**file.
2. Navigate to the node - **<header:def id="HeaderBarRoot">**
3. Under that, navigate to the child node - **<header:item id="QuickSearch">**
4. Under this node, create a new entry to add the custom entity as a menu item.
5. Create another entry to add the custom entity as a bookmark item.

If you add more than 20 custom bookmarks and menu items to the Navigator menu on the Navigation bar, and the menu extends below the browser pane, some bookmarks or menu items may not be visible. To resolve this issue, remove the items that you do not require, ensuring that all items fit within the browser pane.

Example data for the Attribute Table for Menu and Bookmark items

Attribute Name	Description for Menu Items	Description for Bookmark Items
id	Enter the entity name followed by the keyword Search. For example, if the entity name is Customers, then the Id should be CustomersSearch	Enter the entity name followed by the keyword Bookmarks. For example, if the entity name is Customers, then the id should read as CustomersBookmarks. This value, which is case sensitive, maps the menu item of the entity to the bookmark(s).
ucf:uid	Globally Unique Identifier (GUID). Generate a new GUID and use the same. For information on generating GUIDs, refer to MSDN (http://msdn.microsoft.com/en-us/library/aa475087.aspx)	Globally Unique Identifier (GUID) – Generate a new GUID and use the same. Refer to the GUID Generation topic in MSDN to review the steps for generating GUIDs: http://msdn.microsoft.com/en-us/library/aa475087.aspx
popUp	Enter 0 (zero) as the value	Enter 0 (zero) as the value
flyout	Not applicable for menu items	Enter 1 (one) as the value

Attribute Name	Description for Menu Items	Description for Bookmark Items
url	Leave this blank	Leave this blank
target	Enter idFrameNavigator as the value	Enter idFrameNavigator as the value
targetArgument	Use the same value that you entered in the entitiy_name field in the navigator_entity_field_master table in the Persistence DB. This value, which is case sensitive, maps the database to the CM application.	Leave this blank
captionId	To support localization for the caption of the menu item, add a new entry in the ‘config.xml’ file that is located under C:\Program Files (x86)\onyx\employeeportal\ in the OEPserver: <string name="menu_customerSearch" id="" text="Customer"/> Use the value of the ‘name’ attribute for captionId attribute. The value supplied as the ‘text’ attribute appears in the OEP.	To support localization for the caption of the bookmark item, add a new entry in the ‘config.xml ‘which is under C:\Program Files (x86)\onyx\employeeportal\eng on the OEPserver: <string name="menu_customerBookMarks" id="" text="Customer Bookmarks"/> Use the value of the ‘name’ attribute for captionId attribute. The value supplied as the ‘text’ attribute appears in the OEP.

Entering Resource String Values

Create one entry for each custom search type in the Navigator.Resources project to specify the label to identify the custom entity in tool tips and messages.

To enter resource string values:

1. In your development environment, ensure that you have installed the following programs on your computer:

   - The latest version of Microsoft Visual Studio 2012 with the latest updates available from Microsoft
   - Microsoft Silverlight 5.0
   - RadControls for Silverlight Q3 2013

2. In your Onyx installation package, go to Customization Support\Web Server\.

   To modify resource strings for a specific language, use the installation package for the corresponding language.

3. From the **Web Server** folder, copy the **Navigator.Resources** project to the desired folder on your development computer.
4. From the **Navigator.Resources** project, open the solution file **Navigator.Resources.sln** in Visual Studio 2012.
5. In Solution Explorer, open the **LocalResource.resx** file.
6. Create one entry for each custom search type and enter values in the following format:

   - Resource String Name = <label_customentityname>, where the entity name is the value that you entered in the entity_name field of the Navigator_entity_master table.
   - Value = <desired display value in the installation language>

   For example, for the custom search type ‘Customers’, you can enter the following: Resource String Name =

Label_Customer, and Value = Customers.

7. Set the configuration mode to Release. To do this, select **Build>ConfigurationManager option>Active Solution Configuration**
8. Build the solution.
9. In the **Navigator.Resources** project folder, navigate to **\Navigator.Resources\Bin\Release**, and copy the updated **Navigator.Resources.dll**.
10. Paste the Navigator.Resources.dll into the **ClientBin** folder within the OEP installation folder. The default location for the folder is C:\Program Files (x86)\onyx\EmployeePortal\QuickSearch\ClientBin.
11. Clear all cache and temporary Internet files on each client computer.

! **Important:** Be sure to back up the modified project. You will need it when you want to make further modifications and when you want to upgrade to a newer version of Onyx.

Modifying Entity View in Database

Modify the desired entity view to add a new field. You can modify a default view, or a custom view that you created for a new entity. For a list of the default views available, refer to Entity Views.

To modify the entity view:

1. In the Onyx database, identify the table columns to include in the view.

   Be sure to include those table columns in the view that are required to perform any operation for the entity in Onyx.

2. Expand **Views**.
3. Right-click the view that you want to modify, and select **Script View As >ALTER To >New Query Editor Window**.
4. Add the custom fields for the selected view at the end of the fields list in the SELECT statement, in the following format:

   [TableAlias].[field_name] AS [FieldAlias],

   For example, c.company_id AS primaryId, where the field_name company_id from the Company table is displayed as the primary ID.

5. If the custom field that you are adding is a reference field, then you must include one more line in the view, in the following format:

   [ReferenceTableAlias].[field_name] AS [FieldAlias]Sort

   This will enable the selected Sort By option to be saved when the query is saved.

6. Execute the modified view against the Onyx database.

Inserting Hyperlink Information in Persistence Database

When you create a custom entity, you can hyperlink certain fields in the Navigator Result Grid to open the corresponding Onyx page, or an external webpage. An entity can have several hyperlinked fields. The **primary_linked_field_name** and **secondary_linked_field_name** columns hold values that determine which page is opened when you click a link.

To create a hyperlinked field:

1. In the **navigator_entity_field_master** table:

   a. Select the row corresponding to the field that you want to create a hyperlink for.

   b. Update the **primary_linked_field_name** and **secondary_linked_field_name** columns for the selected row with the value that you entered created in the DB view. For more information, see Example Data for Custom Field Tables.

Inactivating a Field in Persistence Database

You can inactivate a field if it is no longer required. An inactive field is not available in Navigator.

To inactivate a field:

- In the **navigator_entity_field_master** table in the **Persistence** database, set the value for the **delete_status** field to 1.

Inserting Data in Persistence Database

Read a description and see example values for each table that needs to be modified.

To insert data in the Persistence database:

1. Using Microsoft SQL Server 2008, access the **Persistence** database, right-click the **ActionListProfile** table and select **Edit Top 200 Rows**.
2. Scroll to the bottom of the displayed result grid, and insert one row for each new action button that you intend to add to the Navigator Result Grid Action Menu.
3. Repeat steps 1 and 2 for the following tables:

   - ActionListProfileML table
   - Broker table
   - EndPoint table
   - ActionButton table
   - ActionButtonML table
   - ActionGroup table - enter a row in this table only if you are creating a new action group.
   - EntityGroupMapper table - enter a row in this table to assign a new action group to an existing or to a custom entity.

4. Create a UI resource for each custom entity.
5. Open the navigator_entity_master table, and enter the UI resource name in the GAMEntityResourceName column for the appropriate entity.

Creating New Switch Case

Create a new switch case in the JavaScript function to implement custom logic for the custom action button that you are creating.

To create a new switch case:

1. On the Onyx UI server, navigate to the **C:\Program Files (x86)\Onyx\EmployeePortal\QuickSearch** folder.
2. In an editor such as Notepad, open the **NavigatorSearchHost.asp** file.
3. Navigate to the JavaScript function **jsOpenGamAction**.
4. Add one switch case for each new action button that you created. For examples of a switch case, see the existing switch cases for the default action buttons in this file.

   The name that you enter for the switch case must be the same as the value you entered in the ActionName column of the ActionListProfile table.

5. Save your changes and close the **NavigatorSearchHost.asp** file.

Inactivating an Action Button

You can inactivate an action button if it is no longer required. An inactive action button is not available in Navigator Result Grid Action Menu.

To inactivate an action button:

- In the **ActionButton** table in the Persistence database, set the value for the **RecordStatus** field for the field to **0**.

Updating Tables in Persistence Database

Update the Persistence database with information for each field that you want to enable inline editing for. Read a description and see example values for each table that needs to be modified.

To update tables in the Persistence database:

1. In the **Persistence** database, right-click the LboObject table and select Edit Top 200 Rows.
2. Scroll to the bottom of the displayed result grid.
3. Insert one row for each custom entity object that you want to enable inline editing for in Navigator.
4. Note the auto-generated value in the LBOObjectId column that corresponds to each custom entity object that you added a row for.
5. Right-click the navigator_entity_master table and select Edit Top 200 Rows.
6. For each custom entity row enter the corresponding LboObjectId value, which you noted in step 4, in the LboObjectId column.
7. Right-click the LboPropertyMapper table and select Edit Top 200 Rows.
8. Scroll to the bottom of the displayed result grid.
9. Insert one row for each property of each Logical Business Object (LBO) that you added in the LboObject table.

UI Resource Format

When you create UI resource IDs for Navigator, we recommend that you follow the format: UI:OEP.<Entity_name.UI Element.Resource_Permission>, where:

- Entity_name is the name of the search type that the field is added to.
- UI Element is the UI resource name that you want to grant permissions for. This value is optional for some entity level UI resources.
- Resource_Permission is the permission for the resource.

Updating UI Resource in Persistence Database

After creating the UI resource IDs, you must update the appropriate tables in the Persistence database.

To do this, from the UI Resource ID, remove the text that specifies the permissions, and copy the remaining text to the ResourceName column in the appropriate table.

For example, if the new UI resource for a custom field is UI:OEP.SupportIncident.PriorityDesc.View, then enter 'UI:OEP.SupportIncident.PriorityDesc' in the ResourceName field in the navigator_entity_field_master table.

UI resource type	UI resource ID format	Resource name value to update in Persistence database	Table to update	Column to update
Search Type entity name	UI:OEP.<Resource Name>.<Resource_Permission>	UI:OEP.<Resource Name>	navigator_entity_master	EntityResourceName
Search criteria field or result grid column	UI:OEP.<Resource Name>.<Resource_Permission>	UI:OEP.<Resource Name>	navigator_entity_field_master	ResourceName
Result grid action menu	UI:OEP.<Resource Name>.<Resource_Permission>	UI:OEP.<Resource Name>	navigator_entity_master	GAMEntityResourceN
Result grid action button	UI:OEP.<Resource Name>	UI:OEP.<Resource Name>	ActionButton	ResourceName

Example Data for Custom Entity Tables

- The navigator_entity_master table stores all the entity IDs that you intend to use in Navigator.

Example data for the navigator_entity_master table

Field Name	Field Description	Sample Field Value
entity_id	Primary ID – Enter the next sequential number after the last used value in this field. For example, if the last used value for entity_id is 12, then the new value should be 12 + 1 = 13 To find the last used value, run the following query on the Persistence database: SELECT max(entity_id) FROM navigator_entity_master	13
site_id	The Site ID that you use for Onyx.	1
entity_name	The value for the entity. This should be an alphanumeric value that begins with a letter (an alphabetic character). Do not use special characters or spaces in this value. If creating a new entity, do not use an existing entity name, or a reserved name. For a list of names that cannot be used for custom entities, see Reserved Entity Names.	Customers
entity_view_name	The name of the view created for the entity.	customer_navigator_view
use_type	Enter 2 to indicate the type of operation. Additional options are reserved for future use.	2

Field Name	Field Description	Sample Field Value
page_size	The page size supported in the Result Grid. The default value is 20.	20
max_records	The maximum number of search records displayed in the Result Grid. The default value is 300, and the maximum value is 999.	300
SortOrder	Enter the sort order for the field, in the format <field_id>,<sort order>. Type the field_id for the selected field from the navigator_entity_field_master table. 0 = ascending sort order 1 = descending sort order	271, 0
IsActive	Indicate if the record is active. True = Active, False = Inactive.	True
GAMEntityResourceName	Enter the UI resource name for the GAM. Refer to Create a new UI resource .	UI:OEP.customer.gam
LboObjectId	The LboObjectId from the LboObject table that corresponds to the Navigator entity. This enables inline editing for the entity.	12
EntityResourceName	Enter the UI resource name for the Entity. Refer to Create a new UI resource .	UI:OEP.Navigator.customer.retrieve

- The navigator_entity_master_ml table stores the entity display name that corresponds to each language that you've set up in Onyx.

Example data for the navigator_entity_master_ml table

Field Name	Field Description	Sample Field Value
entity_id	Enter the same value that you entered in the entity_id column of the navigator_entity_master table.	14
site_id	The Site ID that you use for Onyx.	1

Field Name	Field Description	Sample Field Value
Language_code	Enter the language code based on your version of Onyx. Enter 'ENG' for English if you've installed the English version of Onyx. Enter 'JPN' for Japanese if you've installed the Japanese version of Onyx. Do not enter any other values for language code or unexpected results may occur.	ENG
entity_display_name	Enter the value that you want to use as the display name for the custom entity that you are adding.	Customers

Example Data for Custom Field Tables

- The navigator_entity_field_master table stores information for each field that is included in the entity view.

Example data for the navigator_entity_field_master table

Field Name	Field Description	Sample Field Value
field_id	Primary ID – Enter the next sequential number after the last used value in this field. For example, if the last used value for field_id is 617, then the new value should be 617 + 1 = 618 To find the last used value, run the following query on the Persistence database: SELECT max(field_id) FROM navigator_entity_field_master	618
site_id	The Site ID that you use for Onyx.	1
entity_id	Enter the entity ID that you are adding the field for. For a list of existing entity IDs, see Navigator Entities, or enter the entity ID for the custom entity that you created.	3
field_name	The value entered for the fieldalias in the Onyx database view for the field. For a particular entity, each field should contain a unique value in this column. There are some reserved field names, which cannot be used as field names for custom fields. For a list of reserved field names, see Reserved Field Names.	country

Field Name	Field Description	Sample Field Value
position	Enter the next sequential number after the last used value in this field. For example, if the last used value for position is 28, then the new value should be 28 + 1 = 29. To find the last used value, run the following query on the Persistence database: For Search Filters fields: SELECT max(position) FROM navigator_entity_field_master WHERE entity_id =<the value entered for entity_id field in this table> AND use_type = 0 For Result Grid fields: SELECT max(position) FROM navigator_entity_field_master WHERE entity_id =<the value entered for entity_id field in this table> AND use_type = 2	29
type	Enter the data type for the field. The value you should enter here depends on the value entered in the use type column, and it determines the values to enter in the control_type and mask_format columns. For a list of field types, refer to Data Type.	CHAR255
parent	If the field is a child field, enter the corresponding parent field_name - For example, if the field is state, enter country as the parent. Otherwise, enter NULL.	NULL

Field Name	Field Description	Sample Field Value
sequence_index	Enter the next sequential number after the last used value in this field. For example, if the last used value for sequence_index is 28, then the new value should be 28 + 1 = 29. To find the last used value, run the following query on the Persistence database: For Search Filters: SELECT max(sequence_index) FROM navigator_entity_field_master WHERE entity_id ==<the value entered for entity_id field in this table> AND use_type = 0 For Result Grid Fields: SELECT max(sequence_index) FROM navigator_entity_field_master WHERE entity_id ==<the value entered for entity_id field in this table> AND use_type = 2	29
control_type	Enter the control type for the field. The value you should enter here depends on the value entered in the type column. For a list of control types, refer to Control Type.	DropDown
mask_format	For Search Filter fields: use NULL. For Result Grid fields: Default value = NULL. To apply this value to Phone and Postal Code fields, ensure that Country is also included as a field for that entity. For Phone fields, enter Phone. For Postal Code, enter PostalCode. For all other fields, the value you should enter here depends on the Datatype value entered in the type column.	NULL
is_transaction	If the field is required to perform an operation on the entity in Onyx, enter TRUE. For example: Primary ID. For other fields, enter FALSE.	TRUE

Field Name	Field Description	Sample Field Value
use_type	For Search Filter fields, enter 0. For Result Grid fields, enter 2. The value you enter here determines the values you enter in the type, control_type, and mask_format columns. For the Site ID and Primary ID fields, enter 0. For all other fields that are required in the LBO, enter 2.	0
field_state	Enter whether the field should be in the Available, Selected, or Disabled list in the Navigator Search Criteria or Navigator Result Grid Administration window. You can also specify if a field should be in the Header or Detail section of the Search Result window, as well as if a field should not be visible within Navigator. For the values corresponding to each state, see Field State.	2
is_batch_update	Specify if the field is available during a batch_update. The batch update functionality is available only for the default Incident, Work Ticket, and Task entities. NULL = Default value 0 = No (not a batch update field) 1 = Yes	0
ResourceName	Enter the UI resource name. See Create a new UI resource .	UI:OEP.Navigator.SalesOpportunity.Country
cacheName	This field is required only when you select control_type as ‘DropDown’ or ‘Any Tree Picker’, otherwise enter NULL. See Cache Name.	incident.type

Field Name	Field Description	Sample Field Value
CacheParentId	This field is required only when the cacheName is shared between fields and if the value is determined based on the parent ID. For example: cacheName = incident.type CacheParentId: 1= Support 2= Service 3= Sales	1
delete_status	Indicates whether the field is available in Navigator. 0=Available 1=Not available	0
IsReadOnly	Indicates whether the field can be made available for inline editing. Set the value to 1 for fields that should never be edited by users. This makes the field non-editable even if UI resource permissions are granted by the administrator. 0=NotReadOnly 1=ReadOnly	0
is_editable	Reserved for future use	0
width	Reserved for future use	0
is_sorted	Reserved for future use	0
sort_order	Reserved for future use	NULL
linked_property	Use when adding a lookup field. Enter the field_name of the field that you want to use as the lookup field.	NULL
primary_linked_field_name	Use when adding a hyperlink to a column. Enter the field_name which has the value of object type enum.	Refer the field_name “ownerSecondaryId” for the primary_linked_field_name value.
secondary_linked_field_name	Use when adding a hyperlink to a column. Enter the field_name which has the value sub-category of the obect type.	Refer the field_name “ownerSecondaryId” for the secondary_linked_field_name value.
Batch_sequence_index	Use when selecting the order of the control to be displayed on the UI.	-
Is_exist	Use when joining the views between tables.	-

Field Name	Field Description	Sample Field Value
Is_required	Use when making a field mandatory in the search criteria.	-

- The navigator_entity_field_master_ml table stores the field display name that corresponds to each language that you have set up in Onyx.

Example data for the navigator_entity_field_master_ml table

Field Name	Field Description	Sample Field Value
field_id	Enter the same value that you entered in the field_id column of navigator_entity_field_master table.	618
Language_code	Enter the language code based on your version of Onyx. Refer to the Language table in the Onyx database. Do not enter any other values for language code or unexpected results may occur.	ENG
site_id	The Site ID that you use for Onyx.	1
display_name	Enter the value that you want as the Display Name for the field that you are adding.	Owner Country

Example Data for Custom Action Tables

- The ActionListProfile table stores the profile ID for the action, and associates this profile ID with the corresponding action in the legacy JavaScript code.

Example values for the ActionListProfile table

Field Name	Field Description	Sample Field Value
ProfileId	This field is automatically populated with the next sequential number for the table row.	12
SiteId	The Site ID that you use for Onyx.	1
ActionName	The name that identifies the custom action. Enter the same value that you enter for the new switch case to map the action button to the legacy code.	CloneCompany
IsSynchronous	Indicate whether the action is a synchronous call or an asynchronous call. At this time, only synchronous calls are supported. False =Synchronous, True = Asynchronous.	False
InsertBy	Enter the username that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

- The ActionListProfileMl table associates each profile ID in the ActionListProfile table with a display name. This name is used to identify the action in the Action Button Configuration UI, which will be developed at a future date.

Example values for the ActionListProfileMl table

Field Name	Field Description	Sample Field Value
ProfileId	The profile ID that you are entering a display name for. To find the profile ID for an action, run the following query on the Persistence database, where <Name of the custom action>is the value for the ActionName column in the ActionListProfile table. Select ProfileId from ActionListProfile where ActionName='<Name of the custom action>	12
SiteId	The Site ID that you use for Onyx.	1
Language_code	Enter the language code based on your version of Onyx. Refer to the Language table in the Onyx database. Do not enter any other values for language code or unexpected results may occur.	ENG
ActionDisplayName	Enter the text to display for and identify the action in the Action Button Configuration UI, which will be developed at a future date.	Clone company

- The Broker table associates each profile ID in the ActionListProfile table with a broker ID that initiates an action. At this time, it is possible to associate only one broker ID with each profile ID.

Example values for the Broker table

Field Name	Field Description	Sample Field Value
BrokerId	This field is automatically populated with the next sequential number for the table row.	23

Field Name	Field Description	Sample Field Value
ProfileId	The Profile id to associate the broker ID with. To find the profile ID for an action, run the following query on the Persistence database, where <Name of the custom action>is the value for the ActionName column. : Select profileId from ActionListProfile where ActionName='<Name of the custom action>'	12
SiteId	The Site ID that you use for Onyx.	1
Priority	The priority in which to run the broker. At this time, this value should always be 1.	1
InsertBy	Enter the username that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	?
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

- The EndPoint table associates each broker ID to an endpoint ID that determines the destination for the action. At this time, only LegacyCodeEndPoint which opens an existing Onyx page, is supported.

Example values for the EndPoint table

Field Name	Field Description	Sample Field Value
EndPointId	This field is automatically populated with the next sequential number for the table row.	23
SiteId	The Site ID that you use for Onyx.	1
BrokerId	The BrokerID to associate the endpoint with.	23
Priority	The priority in which to call the end point. At this time, this value should always be 1.	1
EndPoint	The target URI that must be invoked by the action button. At this time, this field is not used and is reserved for future use.	NULL
EndPointTypeId	The provider type of the endpoint which handles invocation of the endpoint. At this time, the only supported value is 4, which represents LegacyCodeEndpoint.	4
InsertBy	Enter the username that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

- The ActionButton table associates each profile ID in the ActionListProfile table with an ActionButton ID. In this table, you specify the entity and group that the action belongs to, and the icon, sequence number, and resource ID to use for the button.

Example values for the ActionButton table

Field Name	Field Description	Sample Field Value
ActionButtonId	This field is automatically populated with the next sequential number for the table row.	12
SiteId	The Site ID that you use for Onyx.	1
ProfileId	The ProfileId to associate the action button ID with. To find the profile ID for an action, run the following query on the Persistence database, where <Name of the custom action>is the value for the ActionName column. : Select profileId from ActionListProfile where ActionName='<Name of the custom action>'	71
EntityId	The entity ID to associate the action button with. To find the entity ID corresponding to the entity name that you are creating the action button for, see the navigator_entity_master table in the Persistence database.	1
GroupId	The Action Group ID in which to include the button. To find the action group ID, see the ActionGroup table in the Persistence database.	1
SequenceIndex	The sequence of the button within the selected action group.	2
Icon	The icon for the button in the Navigator Result Grid Action Menu. This icon will be mapped as relative to the folders present in employeeportal\quicksearch\clientbin folder. Ensure that the image format is Portable Network Graphics (png) and that the image size is 18*18.	Icon/AddContact.png

Field Name	Field Description	Sample Field Value
ResourceName	The UI resource to associate with the action button. To create a UI Resource, see create a new UI resource.	UI:OEP.Navigator.Company.CompanyCloneItem
InsertBy	Enter the user name that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

- The ActionButtonMl table associates each ActionButtonID in the ActionButton table with a tool tip that appears when a user points to the button.

Example values for the ActionButtonMl table

Field Name	Field Description	Sample Field Value
ActionButtonId	The action button ID to create the caption for. Enter the appropriate ActionButtonID value from the ActionButton table.	12
SiteId	The Site ID that you use for Onyx.	1
LanguageCode	Enter the language code based on your version of Onyx. Refer to the Language table in the Onyx database. Do not enter any other values for language code or unexpected results may occur.	ENG

Field Name	Field Description	Sample Field Value
Caption	The tool tip to display when a user points to the button on the Navigator Result Grid Action Menu.	Clone this company

- The ActionGroup table stores information for all the action groups that are created in Navigator. Enter a value here only if you are creating a new action group.

Example values for the ActionGroup table

Field Name	Field Description	Sample Field Value
GroupId	This field is automatically populated with the next sequential number for the table row.	3
SiteId	The Site ID that you use for Onyx.	1
GroupName	Enter a name for the action group.	ListAction
InsertBy	Enter the user name that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

- The EntityGroupMapper table maps action groups to each entity and stores information about the display sequence. Enter a value to assign a newly created action group to each entity, or to assign an existing action group to a custom entity.

Example values for the EntityGroupMapper table

Field Name	Field Description	Sample Field Value
EntityGroupMapperId	This field is automatically populated with the next sequential number for the table row.	25
SiteId	The Site ID that you use for Onyx.	
GroupId	The Action Group ID to include for the entity. To find the action group ID, see the ActionGroup table in the Persistence database.	
EntityId	The entity ID to associate the group with. To find the entity ID corresponding to the entity name that you are mapping the group to, see the navigator_entity_master table in the Persistence database.	
SequenceIndex	The sequence in which to display the group within the action menu.	
RowNumber	The row in the action menu in which to display the group.	
InsertBy	Enter the user name that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

Example Data for Inline Editing Tables

- The LboObject table stores the Logical Business Object (Lbo) names that inline editing is enabled for, and the method that is supported for each object. For each row that you add to this table, you must add at least one corresponding row in the LboPropertyMapper table.

Example values for the LboObject table

Field Name	Field Description	Sample Field Value
LboObjectID	This field is automatically populated with the next sequential number for the table row. Enter this value in the LboObjectId column of the navigator_entity_master table for the corresponding Navigator entity.	12
SiteId	The Site ID that you use for Onyx.	1
ObjectName	The value of the object name from Object Designer.	Company
MethodName	The method to use for the object. Currently, only the Update method is supported.	Update
InsertBy	Enter the username that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa

Field Name	Field Description	Sample Field Value
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate if the record is active. True = Active, False = Inactive.	True

- The LboPropertyMapper table associates each Logical Business Object (LBO) property with its corresponding field in the navigator_entity_field_master table.

Example values for the LboPropertyMapper table

Field Name	Field Description	Sample Field Value
LboPropertyId	This field is automatically populated with the next sequential number for the table row.	12
SiteId	The site ID that you use for Onyx.	1
FieldId	The value corresponding to the field in the Field id column of the navigator_entity_field_master table, that you plan to use as the lookup field.	618
LboProperty	The Lbo property in the OEAS corresponding to the Navigator field.	
LboObjectId	The LboObjectid from the LboObject table that corresponds to the Navigator entity that the field belongs to.	12

Field Name	Field Description	Sample Field Value
PropertyPath	The XPath that the property is located under in the Update Method XML. The path must end with / and must not contain the property. Currently, child objects are not supported for inline editing.	company/
InsertBy	Enter the username that inserted the record.	sa
InsertDate	Enter the date on which the record is inserted.	2010/05/19
UpdateBy	Enter the username that last updated the record.	sa
UpdateDate	Enter the date on which the record is last updated.	2010/05/19
RecordStatus	Indicate of the record is active. True=Active, False=Inactive.	True

About XML Files

Onyx uses metadata stored in XML files to control the information that is displayed on the Summary pages within Navigator. You can modify these XML files to add new elements, and to change attributes for existing elements. You can only add LBO properties to your Summary pages if those properties already exist or were previously created in your Onyx CRM system. For information on adding LBO properties to your Onyx CRM system, see the OnyxTechnical Guide.

The following tables list the XML files used to configure Summary pages, along with a description of what each file is used for. The XML files are located on the OEASserver, within your Onyx Gateway Serviceinstallation folder. The default file path is: C:\Program Files (x86)\Onyx\AppServer\Applications\Onyx\OnyxGatewayService\App_Data\NavigatorProfiles.

- Configuring Summary pages

Do not change the name of an XML file even if you have customized the name of the entity.

Files used to configure Summary pages

Default file path: C:\Program Files (x86)\Onyx\AppServer\Applications\Onyx\OnyxGatewayService\App_Data\NavigatorProfiles

File Name	Description
NavigatorCompanyDetails.xml	Maps the fields displayed on the Company Summary page to the linked LBO property.
NavigatorIndividualDetals.xml	Maps the fields displayed on the Individual Summary page to the linked LBO property.

File Name	Description
NavigatorIncidentDetails.xml	Maps the fields displayed on the Incident Summary page to the linked LBO property.

Understanding Context Variable Values

Context variable values define a context based on which records are filtered for a navigation menu list item. When a user taps a navigation menu item, these values are returned to OGS. Based on the value received, OGS sends the relevant data for the filter to Onyx Mobile.

The following context variable values are currently implemented in Onyx Mobile:

Context variable value	Description
$primaryId	Retrieves records that have the primary ID of the displayed record as the value of the property.
$Credential	Retrieves records based on the logged on user's Onyx session ID.
$appName	Retrieves records based on the OEAS application name.
$userId	Retrieves records that have the logged on user's ID as the value for the property.
$contentType	Retrieves records in the specified content format, for example JSON.
$siteId	Retrieves records that match the site ID specified in the app's configuration.
$lang	Retrieves records that match the language specified in the app's configuration.

Customizing Themes in Navigator

Note: By default, the theme used in the Navigator feature is Windows 8.

1. Open the csproject in visual studio 2012.
2. Modify the .xaml file(s) that you wish to customize in the Navigator. The following table contains the list of configurable .xaml files.

Note: All xml files in the Navigator theme will be originally available in your Onyx installation package. Go to Customization Support\Web Server\\Navigator.Theme folder with the name Navigator.Theme.csproj.

List of configurable XAML files

XAML to modify	Description
Brushes.xaml	The default colors used in the background for all controls used in the Navigator. The Login page, Home page navigator filters and Notification tab in the user preferences screen are present in this file. Any customizations to this file will reflect in all these screens.
CheckboxStyle.xaml	This file is used to change the style of the checkbox control used in the Login page, Home page navigator filters and Notification tab in the user preference screen.
CommonStyle.xaml	This file is used to change the style of Borders, ComboBoxes, DatePicker, Buttons, MaskedEdit, ScrollBar, and Images.
ListBoxStyle.xaml	This file is used to change the style list boxes control used in the Login page, Home page navigator filters and Notification tab in the user preference screen.
PopUpWindowsStyle.xaml	The Pop ups (batch update window panel/ UserPicker) styles available
RadDataPageStyle.xaml	This file is used to change the style of Paging control used in the Login page, Home page navigator filters and Notification tab in the user preference screen.
RadGridViewStyle.xaml	This file is used to change the style of GridView control used in Login page, Home page navigator filters and Notification tab in the user preference screen.
RadPanelBarStyle.xml	This file is used to change the style of Panel Bar control used in Login page, Home page navigator filters and Notification tab in the user preference screen.

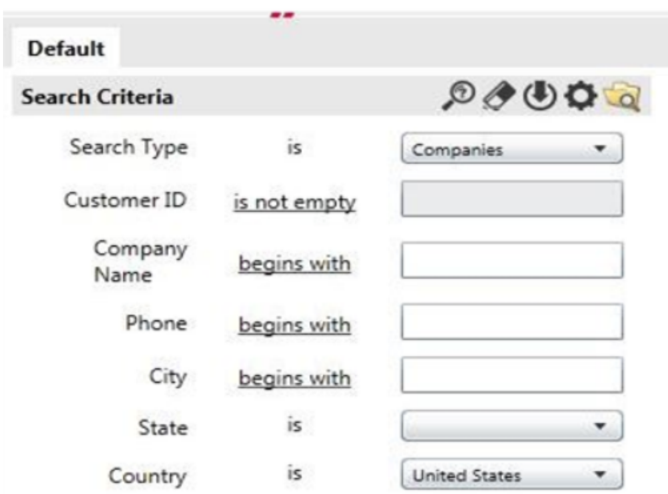
XAML to modify	Description
RadTabControlStyle.xaml	This file is used to change the style of Tab control used in Login page, Home page navigator filters and Notification tab in the user preference screen.
TextBlockStyle.xaml	This file is used to change the style of TextBlock control used in Login page, Home page navigator filters and Notification tab in the user preference screen.
TextBoxStyle.xaml	This file is used to change the style of Text Box control used inLogin page, Home page navigator filters and Notification tab in the user preference screen.

3. Once the changes are done to the .xaml files, set the configuration mode to Release. To do this, select **Build>ConfigurationManager option>Active Solution Configuration**
4. Build the solution.
5. In the **Navigator.Theme** project folder, navigate to **\Navigator.Theme\Bin\Release**, and copy the updated **Navigator.Theme.dll**.
6. Paste the **Navigator.Theme.dll** into the **ClientBin** folder within the OEP installation folder. The default location for the folder is C:\Program Files (x86)\onyx\EmployeePortal\QuickSearch\ClientBin.
7. Clear all cache and temporary Internet files on each client computer.

Note: By default, the project will be in Debug mode. This has to be changed to Release mode.

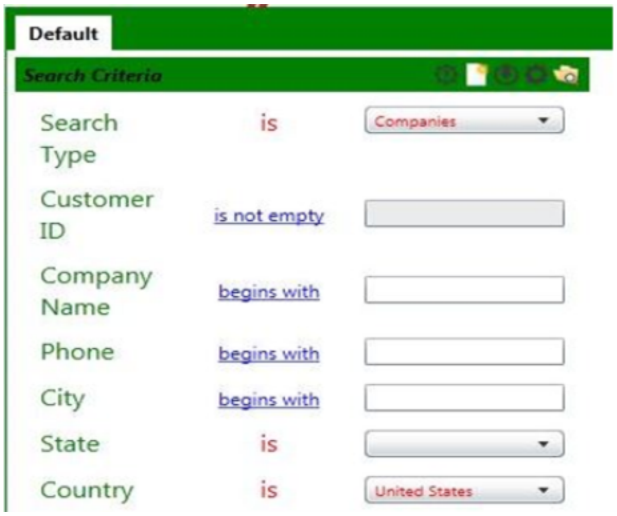
The following example shows how to customize the color scheme in the Navigator interface.

Before customization:



To change the color scheme of the interface:

1. Open Brushes.xaml.
2. Search for HeaderBrush<SolidColorBrush x:Key="HeaderBrush" Color="#E8E8E8"/>.
3. Set the color of your choose. Example: <SolidColorBrush x:Key="HeaderBrush" Color="Green"/>.
4. Compile the dll and replace the dll mention in above path.



For more details on customization you can visit the below link:

http://www.telerik.com/help/silverlight/styling-apperance-implicit-styles-overview.html

Navigator Theme Controls

The following matrix shows the list of controls used in the respective areas in Navigator.

For example, TextBlock control is used as SPCtrlLbl in **Search Criteria Panel**, **Search Criteria Field Selection** and **Administration Panel**. Similarly, the following table includes the list of controls used in specific areas:

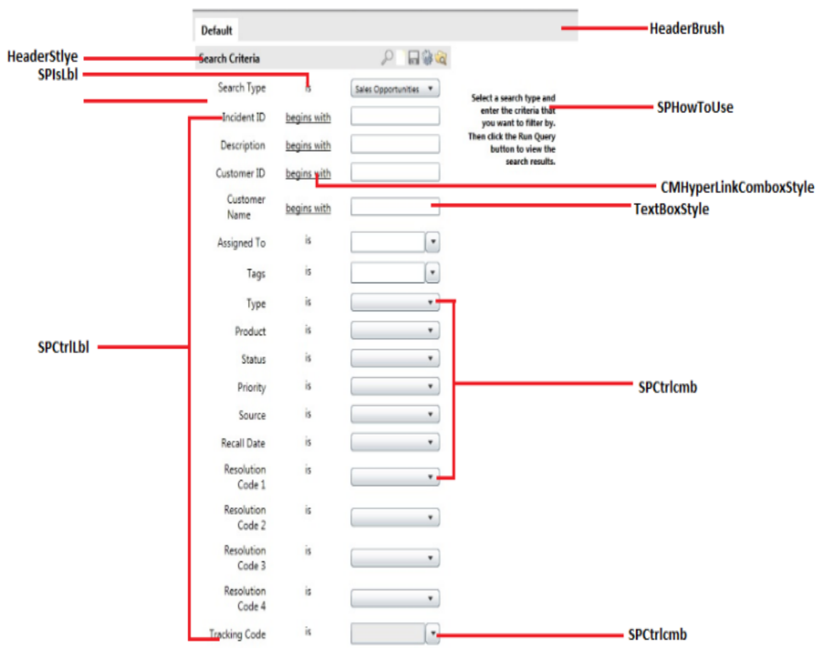
Controls	Search Panel/Config	Result Panel/Config	Summary Panel	Do More Panel	QueryExplorer	Al
TextBlock	SPCtrlLbl	SRCtrlLbl	CSCtrlLbl	DMRecordStyle	QueryLabelStyle	Hea
	SPIslLbl	SRColLbl	CSNormalText			Text
	SPColLbl	SRLoading				
		SRRecordsStyle				
		SRLabelStyle				
TextBox					QueryTextStyle	Text
Grid						
StackPanel						
Border		SRBorderStyle				Bor
ComboBox	SPCtrlCmb	SRCtrlCmb				
DatePicker	SPCtrlDP					
ListBox	SPListBoxStyle	SRListBoxStyle				
Rectangle						
Image						
RadioButton						
CheckBox					QueryCheckBoxStyle	

Controls	Search Panel/Config	Result Panel/Config	Summary Panel	Do More Panel	QueryExplorer	Al
MaskedEdit						
ScrollBar						
ScrollViewer						

Customizable Screens in Navigator

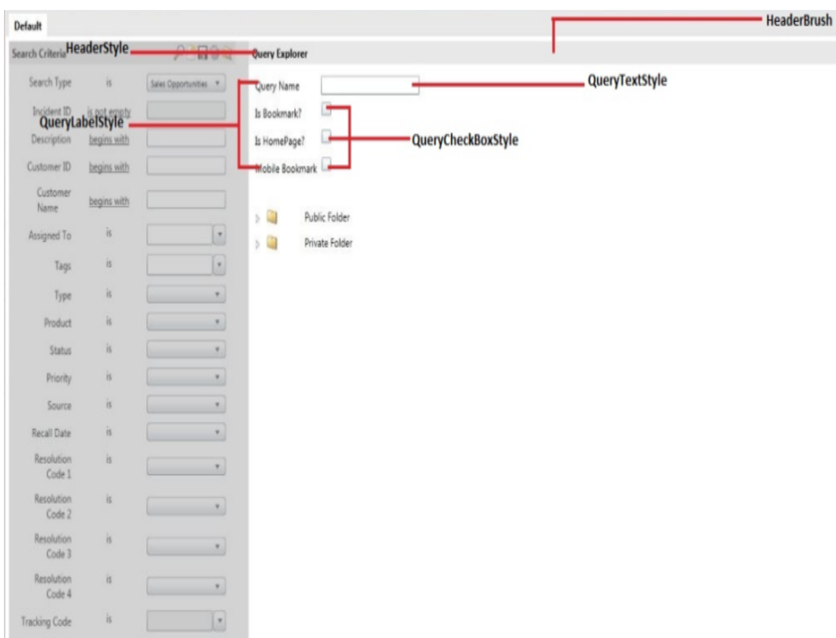
The following screens can be customized in the Navigator feature.

Search Panel

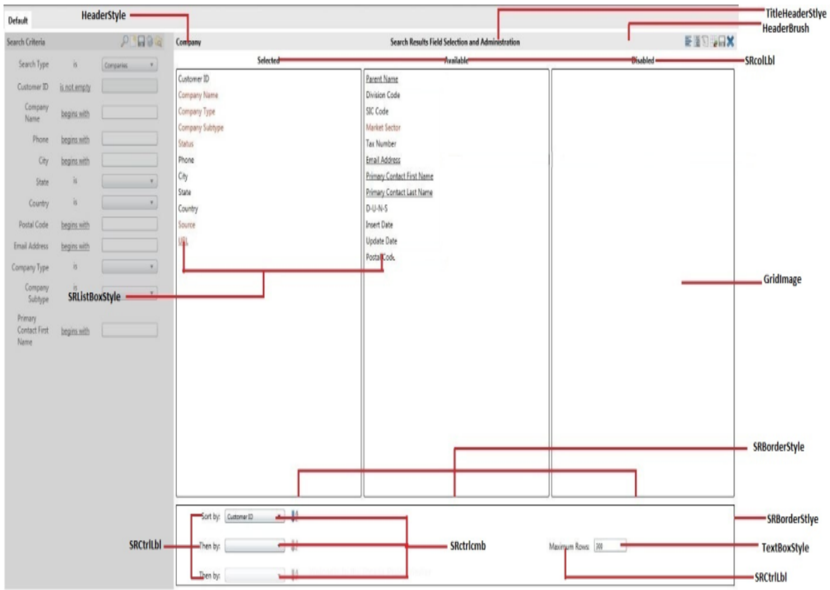


Search Criteria Administration Screen

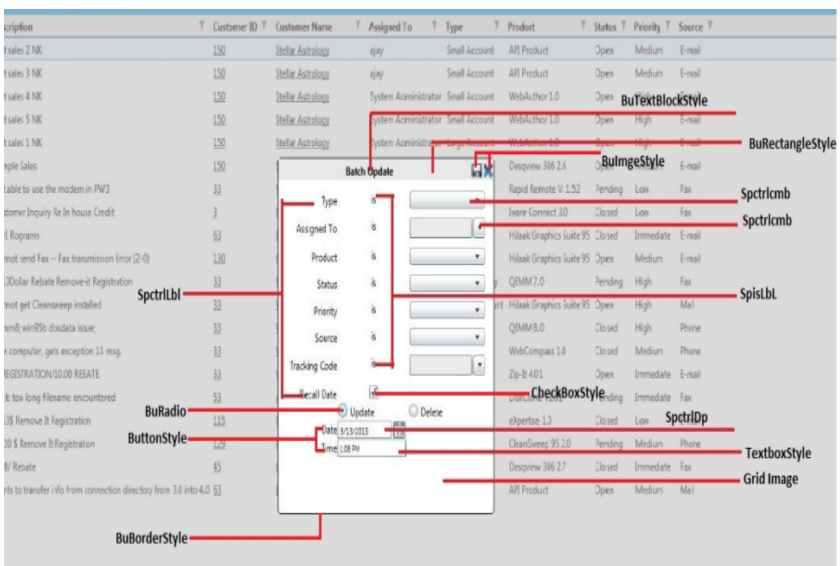
Query Explorer Screen



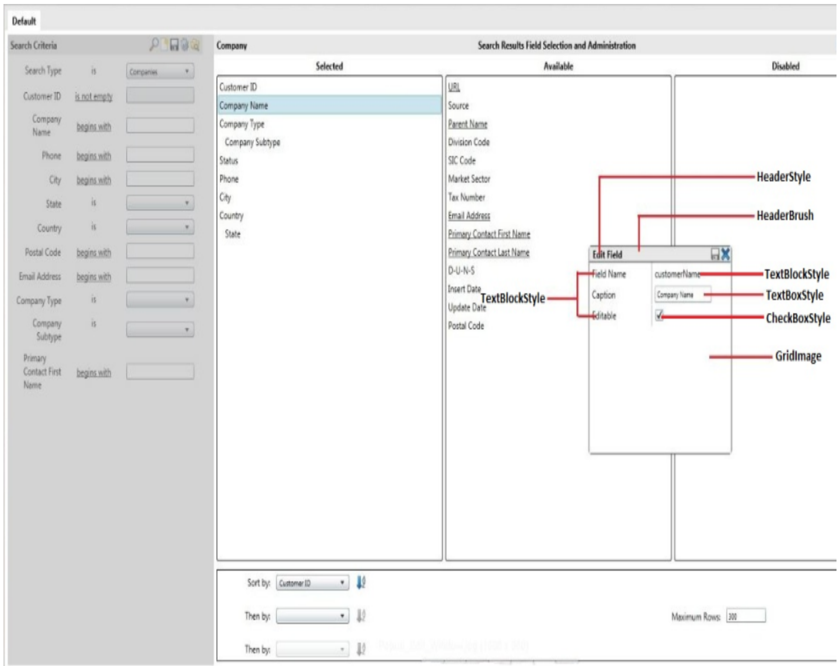
Search Result Administration Screen



Batch Update Screen



Edit Field Configuration Screen


HeaderStyle
HeaderBrush
TextBlockStyle
TextBoxStyle
CheckBoxStyle
TextBlockStyle
GridImage

Customizing Themes in Login Page

1. Open the csproject in visual studio 2012.
2. Modify the .xaml file(s) that you wish to customize in the Navigator. The following table contains the list of configurable .xaml files.

List of configurable XAML files

XAML to modify	Description
Brushes.xaml	The default colors used in the background for all controls used in the Navigator. The Login page, Home page navigator filters and Notification tab in the user preferences screen are present in this file. Any customizations to this file will reflect in all these screens.
LoginPageStyle.xaml	This file is used to change the style used in the Login page screens.

3. Once the changes are done to the .xaml files, set the configuration mode to Release. To do this, select **Build>ConfigurationManager option>Active Solution Configuration**
4. Build the solution.
5. In the **Navigator.Theme** project folder, navigate to **\Navigator.Theme\Bin\Release**, and copy the updated **Navigator.Theme.dll**.
6. Paste the **Navigator.Theme.dll** into the **ClientBin** folder within the OEP installation folder. The default location for the folder is C:\Program Files (x86)\onyx\EmployeePortal\Common\ClientBin.
7. Clear all cache and temporary Internet files on each client computer.

Note: By default, the project will be in Debug mode. This has to be changed to Release mode.

Login Page Theme Controls

The following matrix shows the list of controls used in the respective areas of the Login Screen.

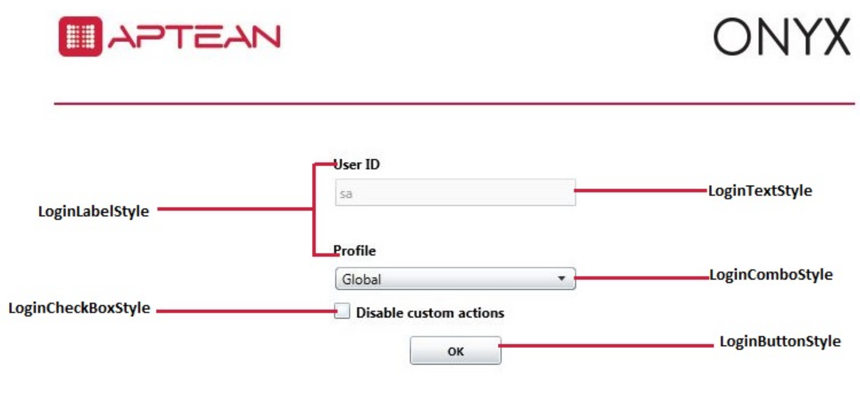
Controls	Login Screen	Login Profile Screen	Cache Allocation Screen	Error Dialog
TextBlock	ErrorLabelStyle		ErrorLabelStyle	HeaderStyle
	LoginLabelStyle		QuotaLabelStyle	ErrorMessageStyle
			HeaderStyle	
	CopyWriteLabelStyle	CopyWriteLabelStyle		
BusyIndicator	CacheLoadingStyle			
	CacheCountStyle			

Controls	Login Screen	Login Profile Screen	Cache Allocation Screen	Error Dialog
Border			LoginBorderStyle	LoginBorderStyle
				ErrorBorderStyle
Image	ComapanyImageStyle	ComapanyImageStyle		
	ProductImageStyle	ProductImageStyle		
	OnyxImageStyle	OnyxImageStyle		
CheckBox		LoginCheckBoxStyle		
Button	LoginButtonStyle	LoginButtonStyle	LoginButtonStyle	ErrorButtonStyle
ComboBox			LoginComboStyle	
TextBox	LoginTextStyle	LoginTextStyle		
PasswordBox	LoginPWDStyle			
Canvas				CanvasStyle

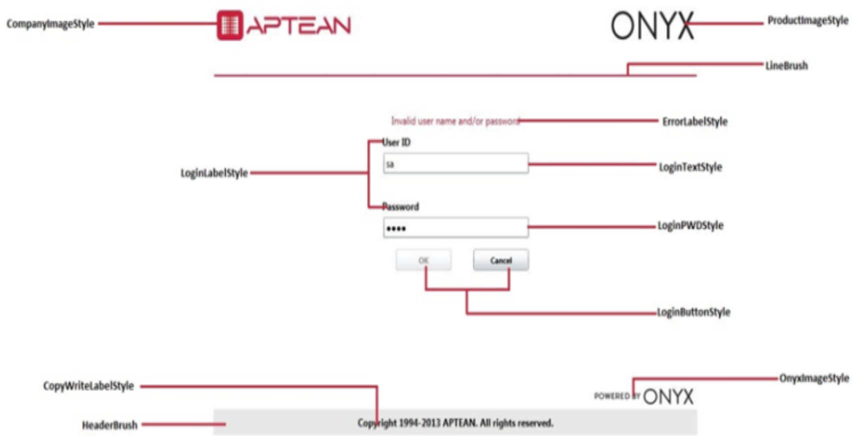
Customizable Screens in Login page

The following screens can be customized in the login page

Login_Front Screen



Login_Back Screen


CompanyImageStyle
APTEAN
ONYX
ProductImageStyle
LineBrush
Invalid user name and/or password
ErrorLabelStyle
User ID
LoginLabelStyle
sa
LoginTextStyle
Password
LoginPWDStyle
OK
Cancel
LoginButtonStyle
CopyWriteLabelStyle
POWERED BY ONYX
OnyxImageStyle
HeaderBrush
Copyright 1994-2013 APTEAN. All rights reserved.

Customizing Themes in Home Page

1. Open the csproject in visual studio 2012.
2. Modify the .xaml file(s) that you wish to customize in the homepage. The following table contains the list of configurable .xaml files.

List of configurable XAML files

XAML to modify	Description
Brushes.xaml	The default colors used in the background for all controls used in the Navigator. The Login page, Home page navigator filters and Notification tab in the user preferences screen are present in this file. Any customizations to this file will reflect in all these screens.
HomePageFilterPageStyle.xaml	This file is used to change the style used in the home page screens.

3. Once the changes are done to the .xaml files, set the configuration mode to Release. To do this, select **Build>ConfigurationManager option>Active Solution Configuration**
4. Build the solution.
5. In the **Navigator.Theme** project folder, navigate to **\Navigator.Theme\Bin\Release**, and copy the updated **Navigator.Theme.dll**.
6. Paste the **Navigator.Theme.dll** into the **ClientBin** folder within the OEP installation folder. The default location for the folder is C:\Program Files (x86)\onyx\EmployeePortal\HomePage\ClientBin.
7. Clear all cache and temporary Internet files on each client computer.

Note: By default, the project will be in Debug mode. This has to be changed to Release mode.

Home Page Theme Controls

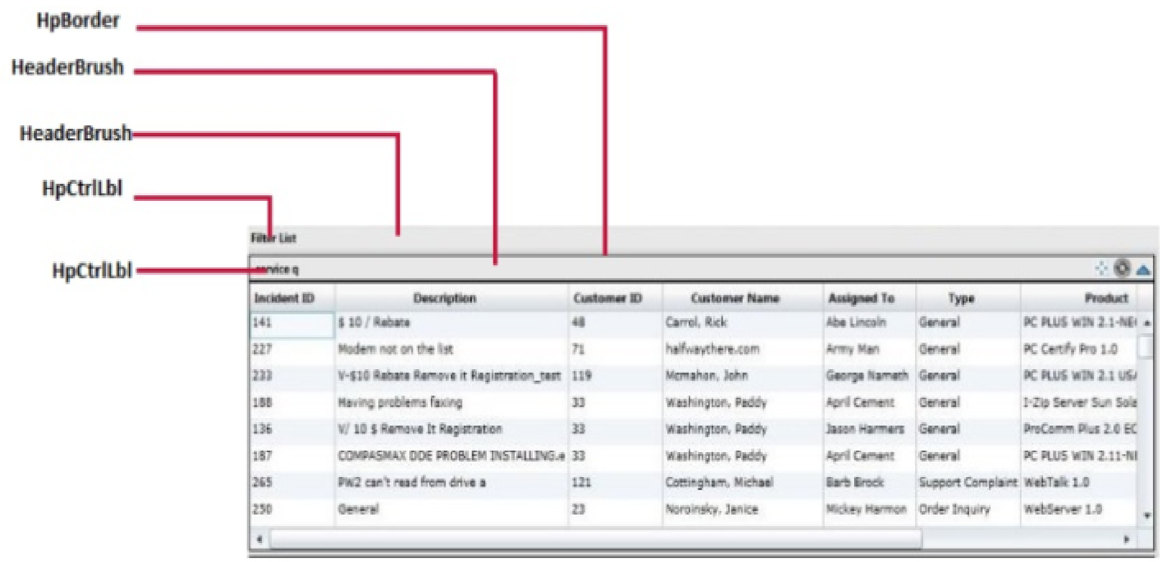
The following matrix shows the list of controls used in the respective areas of the homepage.

Controls	HomePage Result Screen	Home Page Popup Screen
TextBlock	HFCtrlLbl	HFCtrlLbl
		HFTreeLabelStyle
	TBDialog	
Border	HFBorderStyle	HFBorderStyle
Image		HFImageStyle
CheckBox		HFCheckBoxStyle
TreeView		HFTreeStyle
DataGridColumnHeader	dataGridColumnHeaderStyle	

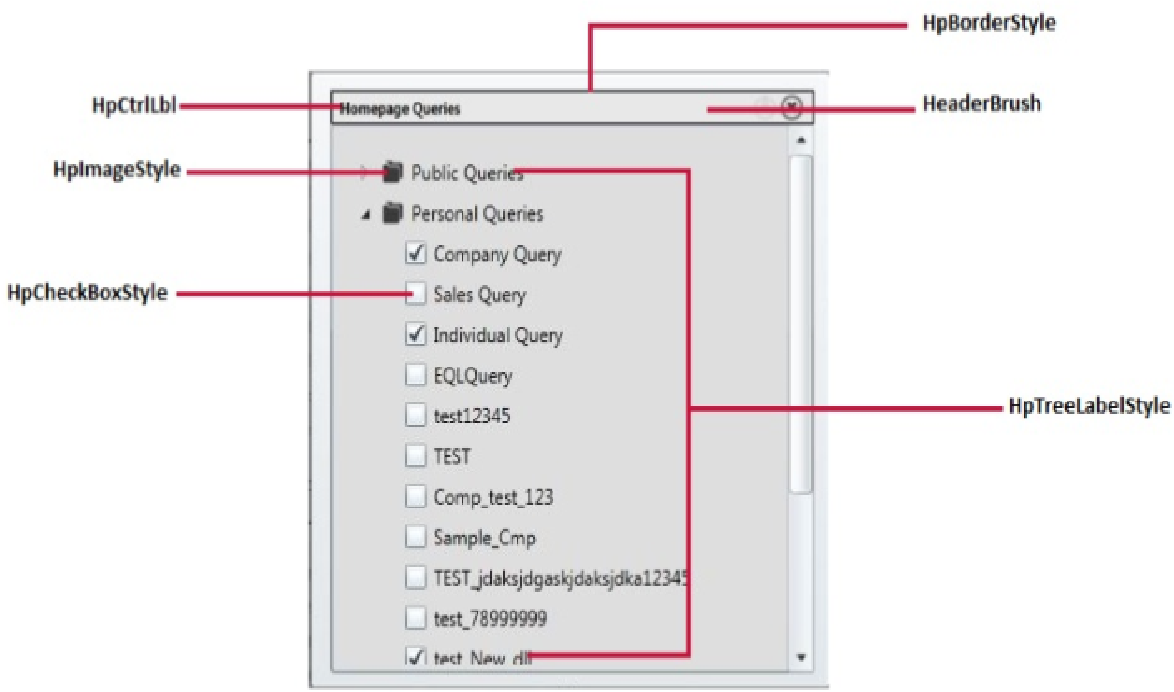
Customizable Screens in Home page

The following screens can be customized in the home page.

Home Page results Screen



Home Page tree Screen



Customizing Themes in Notification Page

1. Open the csproject in visual studio 2012.
2. Modify the .xaml file(s) that you wish to customize in the notification page. The following table contains the list of configurable .xaml files.

List of configurable XAML files

XAML to modify	Description
Brushes.xaml	The default colors used in the background for all controls used in the Navigator. The Login page, Home page navigator filters and Notification tab in the user preferences screen are present in this file. Any customizations to this file will reflect in all these screens.
NotificationPageStyle.xaml	This file is used to change the style used in the notification page screens.

3. Once the changes are done to the .xaml files, set the configuration mode to Release. To do this, select **Build>ConfigurationManager option>Active Solution Configuration**
4. Build the solution.
5. In the **Navigator.Theme** project folder, navigate to **\Navigator.Theme\Bin\Release**, and copy the updated **Navigator.Theme.dll**.
6. Paste the **Navigator.Theme.dll** into the **ClientBin** folder within the OEP installation folder. The default location for the folder is C:\Program Files (x86)\onyx\EmployeePortal\preferences\notificationSubcription.
7. Clear all cache and temporary Internet files on each client computer.

Note: By default, the project will be in Debug mode. This has to be changed to Release mode.

Notification Page Theme Controls

The following matrix shows the list of controls used in the respective areas of the Notification Screens.

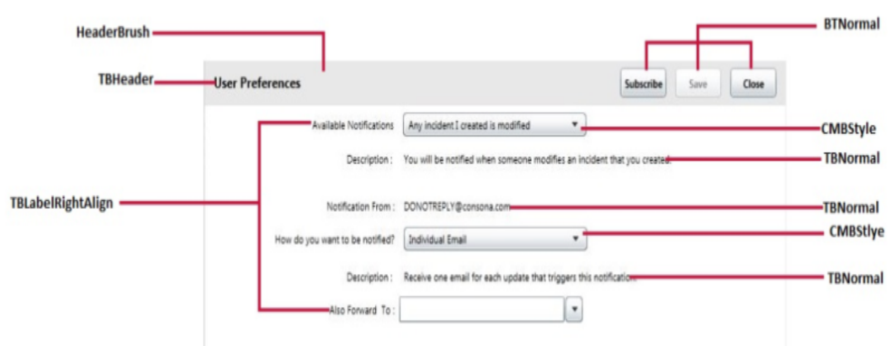
Controls	Notification Main Screen	Notification Add/Edit Screen	ErrorDialog
TextBlock	TBLabel	TBLabel	HeaderStyle
		TBLableRightAlign	ErrorMessageStyle
	TBHeader	TBHeader	
		TBNormal	
	TBDialog		
ScrollBar	ScrollBarStyle		

Controls	Notification Main Screen	Notification Add/Edit Screen	ErrorDialog
ScrollViewer	ScrollViewerStyle		
DataGridColumnHeader	dataGridColumnHeaderStyle		
Button	BTNormal	BTNormal	ErrorButtonStyle
ComboBox		CMBStyle	
TextBox		TBXNormal	
Border			NotificationBorderStyle
			ErrorBorderStyle
Canvas			CanvasStyle

Customizable Screens in Notification page

The following screens can be customized in the notification page

Notification Main Screen



Add Notification Screen