



OneVizion

Basic System Architecture 1 Introduction the Vizion Platform®

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Simply Smarter Information Management

Confidential and Proprietary

1. Introduction to the Vizion Platform

1. What is the Vizion Platform?
2. How to setup?

2. Design

1. Tracker Types
2. Tracker Tree
3. Applets
4. Tabs
5. Fields
6. Views and Filters
7. Row Editor

1. Introduction to OneVizion

What is OneVizion?



OneVizion is an application Platform as a Service

- Build Enterprise applications fast
- Operationalize data effectively
- Seamless integration with other applications
- Deliver to speed of Business
- Effective Program and Project Management
- High scalability
- Track application with Reports and Dashboards
- User audit at record and field level changes

CONQUER YOUR SILOS

Stranded information can become a thing of past

REDUCE MAINTENANCE COSTS

Allows your company to focus on Business and Innovations



BUILD SOLUTIONS, FAST

Deliver to the speed that Business demands

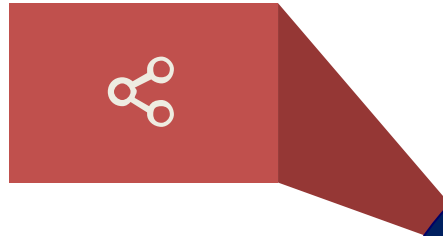
SEAMLESS INTEGRATION

APIs, Imports, Exports provide the ability to seamlessly push/pull from any other systems

Working with the Vizion Platform – How to Setup?

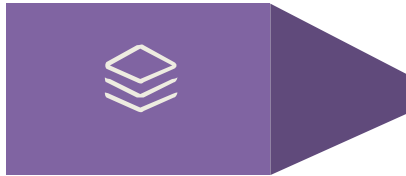
Design (Dev Center)

- Tracker Types
- Tracker Tree
- Config Fields
- Tabs
- Applets



Load (Info Center)

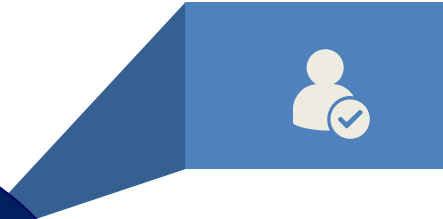
- Import
- DropGrid
- Manual entry



OneVizion Platform

Manage (Admin Center)

- User Access/Privileges
- SSO
- Audit
- Monitor



Apps (App Center)

- Portals
- Application Packages



Access (Info Center)

- Tabs
- Applets
- Grids
- Workflows
- Reports
- Dashboards
- Mobile App



Automation (Dev Center)

- Automations
- Rules, Packages
- API
- Workflows



Topic: Tracker Type and Tracker Record

What is a Tracker Type?

Tracker Types are primarily used for organizing Fields into logical groups representing a business process or object. Think of them as highly customizable containers that you can put Fields and other entities into and then use to control every aspect of interactions between those entities. Any Tracker Type can contain an unlimited number of Fields and can be related to other Tracker Types in a parent-child relationship via the Tracker Tree.

For more detailed information refer to the [Tracker Type Documentation](#)

What is a Tracker Record?

- Instance of the Tracker Type.
- Similar to an 'Object' or instance of a Class in programming language
- Ex. Jobs "X123", "X124", etc.
- Similar to rows in a spreadsheet.

Topic: Tracker Type Setup

Edit Tracker-types - General

<p>Tracker-type Name *</p> <input type="text" value="Case"/> <p>"Item ID" Label (#-18889) *</p> <input type="text" value="Case ID"/> <p>Prefix Label (#-18887) *</p> <input type="text" value="C:"/> <p>Alias Field</p> <input type="text" value=""/> ...	<p>Tracker Label (#-18886) *</p> <input type="text" value="Case"/> <p>"Class" Label (#-20729)</p> <input type="text" value="Case Class"/> <p>"My Items" Label (#-18888) *</p> <input type="text" value="My Cases"/> <p>Limit of Active WPs</p> <div style="border: 1px solid #ccc; padding: 2px;">No Limits</div> <p>PL/SQL ID Reference</p> <div style="border: 1px solid #ccc; padding: 2px;">Out Of Sync</div> <p><input type="checkbox"/> Can be a Template</p> <p><input type="checkbox"/> Is EFile Container?</p>
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Is Cloning Allowed?

Is OneVizion User?

Enable Chat

Field Name	Field Description
Tracker Type Name*	Contains the name of the Tracker Type used by the database. This name should be unique and descriptive, and it cannot contain spaces. Tracker Type names are limited to 30 characters.
Tracker Label*	Contains the name of the Tracker Type seen by the user. It is possible to use an already existing label or add a new one.
"Item ID" Label*	Determines the Field Label for the Tracker Key used on the General Info Tab of the Add and Edit Applets. It also shows as a column heading on the Tracker Browser Grid. It is possible to select from a list of Tracker ID labels or add a new one.
"Class" Label	Used to create a Tracker Class within a Tracker Type. For example, for a Tracker Type of "Candidate", it could have a Class of "Primary" or "Back-Up". It is possible to use an existing label or add a new label. This step is optional.
Prefix Label*	Used to create a unique prefix for the Tracker Type. The value entered in this field displays as a prefix next to the Field Label. This makes it possible to see with what Tracker Type the field is associated with. It should be short (1-4 characters), descriptive (S for Site or C for Candidate), capitalized (AREA), and end with a colon (:).
"My Items" Label*	Used to label a checkbox on the Filter Applet. This checkbox is used to filter items associated with a specific user. It is possible to select from a list of labels or create a new one.
Alias Field	Used to add additional information to be displayed beside the Tracker ID. For example, it could display a vendor name beside the Vendor ID number to make it easier to identify the vendor.
Limit of Active WPs	<p>Options Include:</p> <ul style="list-style-type: none"> No Limits: Add as many workplans without restriction to a Tracker Record / Tracker Type. Users will not be able to add tasks to tab and grids though and tasks would need to be viewed from task pages Single-Active WP of the same Template: Allows to have 2 workplans on a Tracker Record / Tracker Type of the same template as long as one of them is inactive. Users may add tasks to tabs and views. It can have multiple active workplans as long as they are from different templates. Single-Active WP: Same as Single-Active WP of the same Template except only one workplan. <div style="border: 1px solid #ffc107; padding: 5px; margin-top: 10px;"> <p> If "no limits" is chosen, then users cannot add tasks to forms or Tracker Browser Grid.</p> </div>

Topic: Tracker Type Setup

Edit Tracker-types - General

Tracker-type Name *	Tracker Label (#-18886) *
<input type="text" value="Case"/>	<input type="text" value="Case"/>
"Item ID" Label (#-18889) *	"Class" Label (#-20729)
<input type="text" value="Case ID"/>	<input type="text" value="Case Class"/>
Prefix Label (#-18887) *	"My Items" Label (#-18888) *
<input type="text" value="C:"/>	<input type="text" value="My Cases"/>
Alias Field	Limit of Active WPs
<input type="text" value=""/> ...	<input type="text" value="No Limits"/>
<input checked="" type="checkbox"/> Is Cloning Allowed?	PL/SQL ID Reference
<input type="checkbox"/> Is OneVizion User?	<input type="text" value="Out Of Sync"/>
<input checked="" type="checkbox"/> Enable Chat	<input type="checkbox"/> Can be a Template
	<input type="checkbox"/> Is EFile Container?

PL/SQL ID Reference	If "PL/SQL ID Reference" string is invalid or not generated yet then "Out Of Sync" will be shown. More details about "ID Package" and its object statuses can be found on the "Admin Object Reference" page.
Is Cloning Allowed?	Indicates whether the Tracker Records of this Tracker Type can be cloned. This allows many similar Tracker Records with only small differences to be created very quickly.
Can be a Template	Indicates whether this Tracker Type can be used as a template for copying another tracker record. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"><p>⚠ If "Can be a template" is checked The following applies: When creating a new Tracker Record, you can choose a template and it will copy the data exactly like cloning. The Tracker_Template security group prevents general users from creating or editing templates. Note: "Show Templates" and choosing an "Instruction Template" are added to the bottom of the filter for the Tracker Browser.</p></div>
Is OneVizion® User?	Indicates whether this Tracker Type is a User Tracker Type. If this checkbox is selected, users can add additional fields connected to the Tracker Type so user information can be tracked.
Is E-File Container?	Indicates whether the Tracker Type is designed to store E-Files. When this checkbox is selected, the Bulk File Upload Icon becomes available on the Tracker Browser page.
Enable Chat	Ability to enable/disable Tracker Chats for each Tracker Type. An error message will appear when the user tries to send a message when chats are disabled. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"><p>⚠ Users will need the Security Groups CHAT_MESSAGE and CHAT_SUBSCRIPTION.</p></div>

The user creating a **Tracker Type** will have full access to the **General Info** Tab for the Tracker Type they created.

If a user is restricted, however, it's also possible they will lack the privileges necessary to access the **Tracker Browser** and will therefore be unable to access the **General Info** tab.

ⓘ There is a limitation of 6000 Tracker Types per installation.

Topic: **Trackor Class**

- A Trackor Type is similar to Java Class.
- A Trackor Class is similar to Java Class derived from a base class with extra attributes.
- Example would be equipment.
 - Has common attributes of part number, quantity, status, etc.
 - If you have class of radio and shed, then you can have a tab for Radio with frequency and a tab for Shed with height, width, color etc.
 - The tabs, applets, child Trackors will only be visible and usable if associated to the Class.
- Pros:
 - Fewer Trackor Types
 - Less complicated Trackor Tree
 - Easier Rollup
 - Simplifies user experience in Trackor Browser
- Cons:
 - Additional configuration required.

For more detailed information refer to the [Trackor Classes Documentation](#)

Topic: Can be a template?

CF140501

Add Compliance Deliverables - COMP:General Info

Compliance Deliverables Template Is Template?

S:Cand ID S:Site Name
M:Market ID R:Region ID
PR:Project ID * PRG:Program ID

Compliance Deliverable Ordering Information

COMP:Regulatory ID COMP:Compliance Deliverable Type *
COMP:Deliverable Status COMP:Current Version
COMP:Vendor Name COMP:Vendor Work Order Line
COMP:Deliverable Created By COMP:Deliverable Created Date
COMP:Deliverable Released to Vendor COMP:Deliverable Released to Vendor Date

If “Can be a template” is checked

- When creating a new Trackor Record, you can choose a template and it will copy the data exactly like cloning.
- The Trackor_Template security group prevents general users from creating or editing templates.

Compliance Deliverables Template

Show Templates My Compliance

Note: “Show Templates” and choosing an “Instruction Template” are added to the bottom of the filter for the Trackor Browser.

Topic: Key Generation

The Key Generation Tab allows users to automate the generation of the Primary Key for a Trackor Record. If the user DOES NOT check the “Generate Key Automatically” box, they MUST enter a unique ID manually.

If the user DOES check the “Generate Key Automatically” box AND enters a number only in the Start At box (leaving the bottom section BLANK), the key will be generated automatically with the entered number as the starting key ID.

If the user DOES check the “Generate Key Automatically” box AND fills in anything in the bottom section (String Prefix 1/String Prefix 2/String Prefix 3 Static Text/Numeric Suffix), the key will be automatically generated based on the concatenation set up in the bottom section.

970204

Search

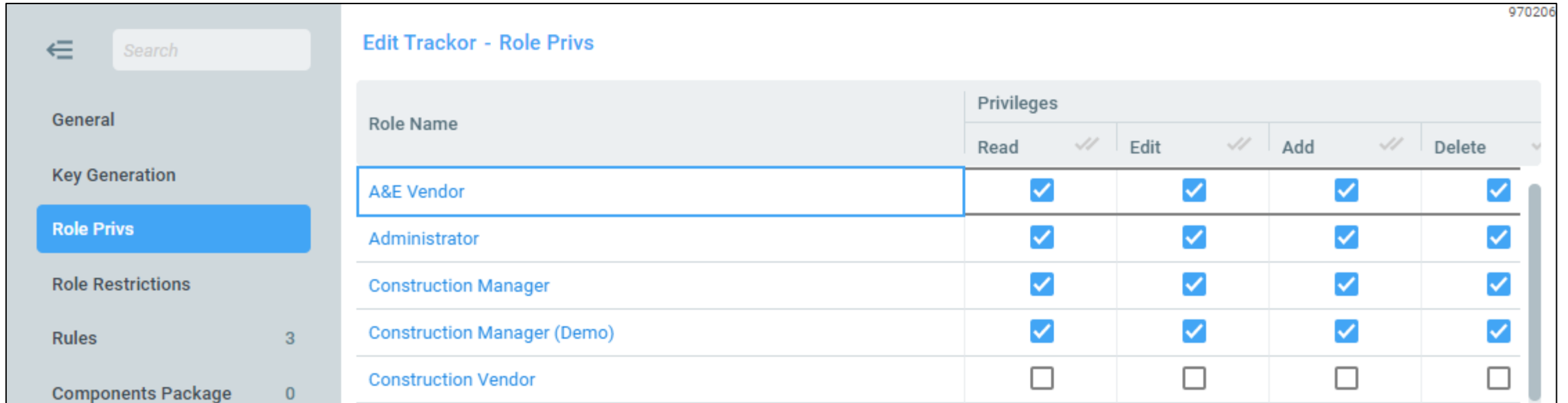
Edit Trackor - Key Generation

Generate Key automatically Start At

String Prefix #1	String Prefix #2	String Prefix #3	Numeric Suffix
Tracker Type <input type="text"/>	Tracker Type <input type="text"/>	Static Text <input type="text"/>	Number of Digits <input type="text" value="1"/>
Field Name <input type="text"/>	Field Name <input type="text"/>		Unique Across <input type="text"/>
Delimiter <input type="text"/>	Delimiter <input type="text"/>		

OK Cancel Apply

Topic: Role Privs



The screenshot shows the 'Edit Tracker - Role Privs' interface. On the left is a sidebar with navigation options: General, Key Generation, Role Privs (highlighted), Role Restrictions, Rules (3), and Components Package (0). The main area displays a table with columns for Role Name and Privileges (Read, Edit, Add, Delete). The 'A&E Vendor' role is selected, and its privileges are all checked. Other roles like Administrator, Construction Manager, and Construction Manager (Demo) also have all privileges checked, while Construction Vendor has none.

Role Name	Privileges			
	Read	Edit	Add	Delete
A&E Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Construction Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Construction Manager (Demo)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Construction Vendor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Role Privs Tab contains the privileges for each Security Role of the current Tracker Type. Click the appropriate checkbox in the columns to alter the permissions for a Role Name. Only change the privileges of the roles that would need to use the tab, therefore, do not change every role's privilege unless every role needs to use the tab.

Topic: Role Restrictions

Security Role	Restriction Mode
A&E Vendor	<input type="text"/>
Administrator	Union Intersection
Construction Manager	
Construction Manager (Demo)	
Construction Vendor	
Demo_Admin	

The Role Restrictions Tab displays the restrictions of various Security Roles. Only Tracker Types of the Child Tracker Type "User" can effectively use the Role Restrictions Tab. If a Security Role is restricted to a Tracker Type, users assigned to that Security Role can only see the Tracker Records belonging to that Tracker Type and its' inheritors all the way down the tree.

For example, if a Security Role is restricted to the Tracker Type "Company" and the Tracker Type "Users" is a child to the type "Company", any users assigned to the restricted Security Role can only see Tracker Records that also belong to that "Company" Tracker Type.

For more detailed information refer to the [Restricted Trackors Documentation](#)

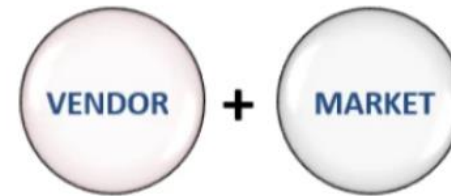
Topic: Role Restrictions

Vendor Contact	Vendor	Market
William Powell	Roland Power Service Company	Atlanta
Tony Roland	Roland Power Service Company	Los Angeles

Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class
AL13936-0000	Atlanta	Southeast Generator Service, Inc.	Generator
AL13936-0001	Atlanta	Coolray HVAC	HVAC
AL13936-0002	Atlanta	Roland Power Service Company	Generator
AL13936-0003	Atlanta	RightCab, Inc.	Cabinet
AL13936-0004	Atlanta	EIC Solutions	HVAC
AL13936-0005	Atlanta	Heating and Air Unlimited	HVAC
AZ15042-0004	Arizona	Roland Power Service Company	Generator
CA10018-0000	Atlanta	Coolray HVAC	HVAC
CA10018-0001	Atlanta	Roland Power Service Company	Generator
CA10036-0002	Los Angeles	Roland Power Service Company	Generator
CA11007-0001	Los Angeles	Roland Power Service Company	Generator
CA11007-0002	Los Angeles	Roland Power Service Company	Generator

Trackor Restrictions set on Maintenance and Instruction

- UNION – Vendor Contact User sees all records that are assigned to his Company OR in his Market



Topic: Role Restrictions

Vendor Contact	Vendor	Market
William Powell	Roland Power Service Company	Atlanta
Tony Roland	Roland Power Service Company	Los Angeles

Vendor Contact = William Powell

Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class
AL13936-0002	Atlanta	Roland Power Service Company	Generator
CA10018-0001	Atlanta	Roland Power Service Company	Generator

1..2 of 2

Vendor Contact = Tony Roland

Maint:Maintenance ID	M:Market	V:Vendor ID	Maint:Maintenance Class
CA10036-0002	Los Angeles	Roland Power Service Company	Generator
CA11007-0001	Los Angeles	Roland Power Service Company	Generator
CA11007-0002	Los Angeles	Roland Power Service Company	Generator

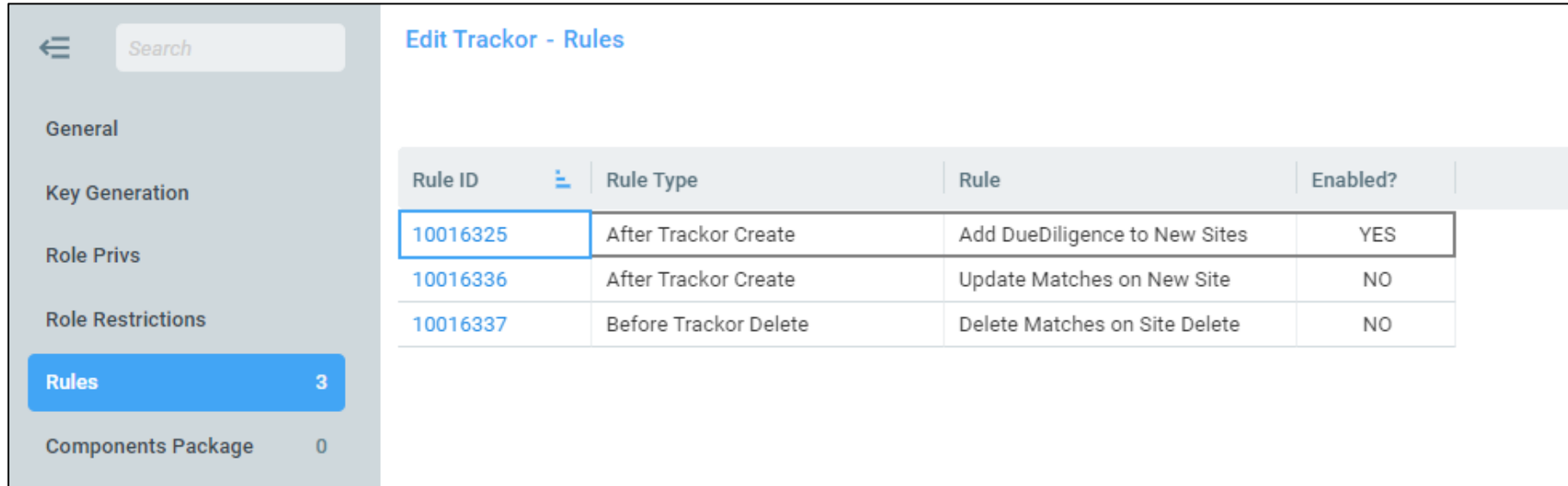
1..3 of 3

Tracker Restrictions set on Maintenance and Instruction

- INTERSECTION – Vendor Contact User sees all records that are assigned to his Company AND are in his Market



Topic: Rules

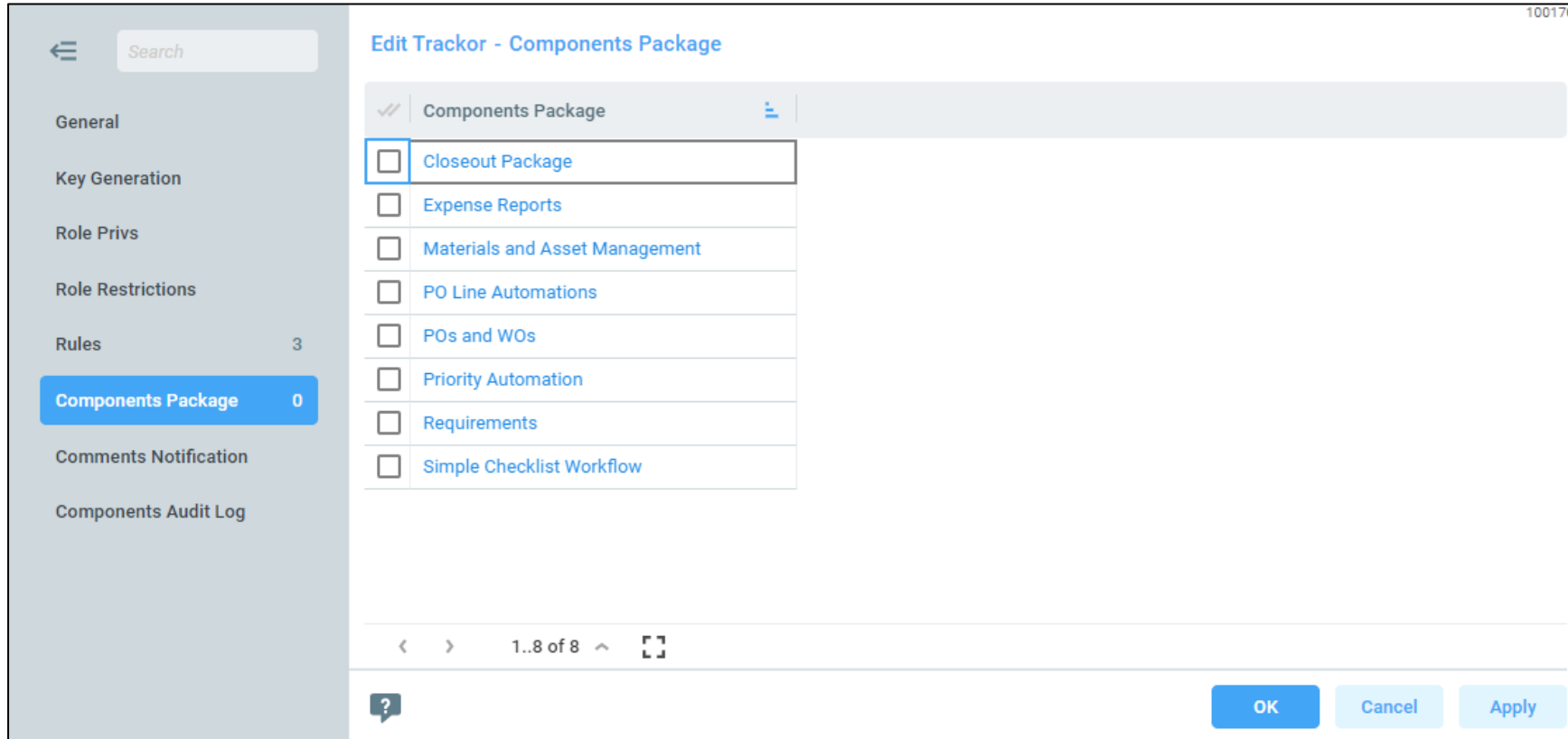


The screenshot shows the 'Edit Trackor - Rules' interface. On the left is a sidebar with navigation options: General, Key Generation, Role Privs, Role Restrictions, Rules (3), and Components Package (0). The 'Rules' option is selected. The main area displays a table with the following data:

Rule ID	Rule Type	Rule	Enabled?
10016325	After Trackor Create	Add DueDiligence to New Sites	YES
10016336	After Trackor Create	Update Matches on New Site	NO
10016337	Before Trackor Delete	Delete Matches on Site Delete	NO

The Rules Tab will contain the Rules assigned to the Trackor Type. Rules provide a mechanism to perform process automation on Trackors and Fields in the platform.

Topic: Components Packages Tab



A Tracker Type or Rule or DB package can be assigned to multiple Component Packages. Component Packages allow Platform Developers to group entities into logical groups based on the Application Package or module that the entity is associated with. For example, an Account will need to be part of the Case Management System and Professional Services Automation.

Topic: Chat Messages Notification Tab

Edit Tracker-types - Chat Messages Notification

Notification Template

You may include fields from the right side list box into Subject and Body of the message

Attributes: Event:Standard Event Attributes

Subject *

[TRACKOR_TYPE] [TRACKOR_KEY] commented by [AUTHOR_OF_CHANGE]

Message Body *

[MESSAGE]

[ATTACHMENTS]

[COMMENT_LINK]Comment[/COMMENT_LINK]

[ENTITY_LINK]Open [TRACKOR_KEY] [TRACKOR_TYPE]/[ENTITY_LINK]

Title: [Case.C_TITLE]

Status: [Case.C_STATUS]

Description: [Case.C_DESCRIPTION MEMO]

Html?

- ATTACHMENTS
- AUTHOR_OF_CHANGE
- COMMENT_LINK
- DATE
- ENTITY_LINK
- MESSAGE
- NOTIFICATION
- NOTIFICATION_TYPE
- PROGRAM_NAME
- TRACKOR_KEY
- TRACKOR_TYPE
- UNSUBSCRIBE

The Chat Messages Notification Tab will appear when the "Enable Chat" checkbox is checked. Chat Messages are Chat threads that can be added to each Tracker Record of the Tracker Type by Users in the system. Administrators can create Global "Chat Added" notifications for every Tracker Type where chats will be used, and then the users that subscribe to individual chats for this Tracker Type and have email notifications enabled in User Settings will receive email notifications.

Topic: Trackor Mail

Trackor Mail is a capability that allows specific Trackor Records to get updated when an email is received by the account configured in the Trackor Mail Setup Applet. This capability allows users to create new records or update existing records by sending an email to the 'Username' account.

The screenshot shows the Trackor Mail Setup interface. On the left, a table lists various Trackor Types. The 'Case' type is selected. The main area displays the 'General Info' tab for the 'Case' type, showing fields for IMAP Server, Path, Username, Password, and other settings. A red box highlights the 'Tracker Mail Setup' button in the top right corner of the interface.

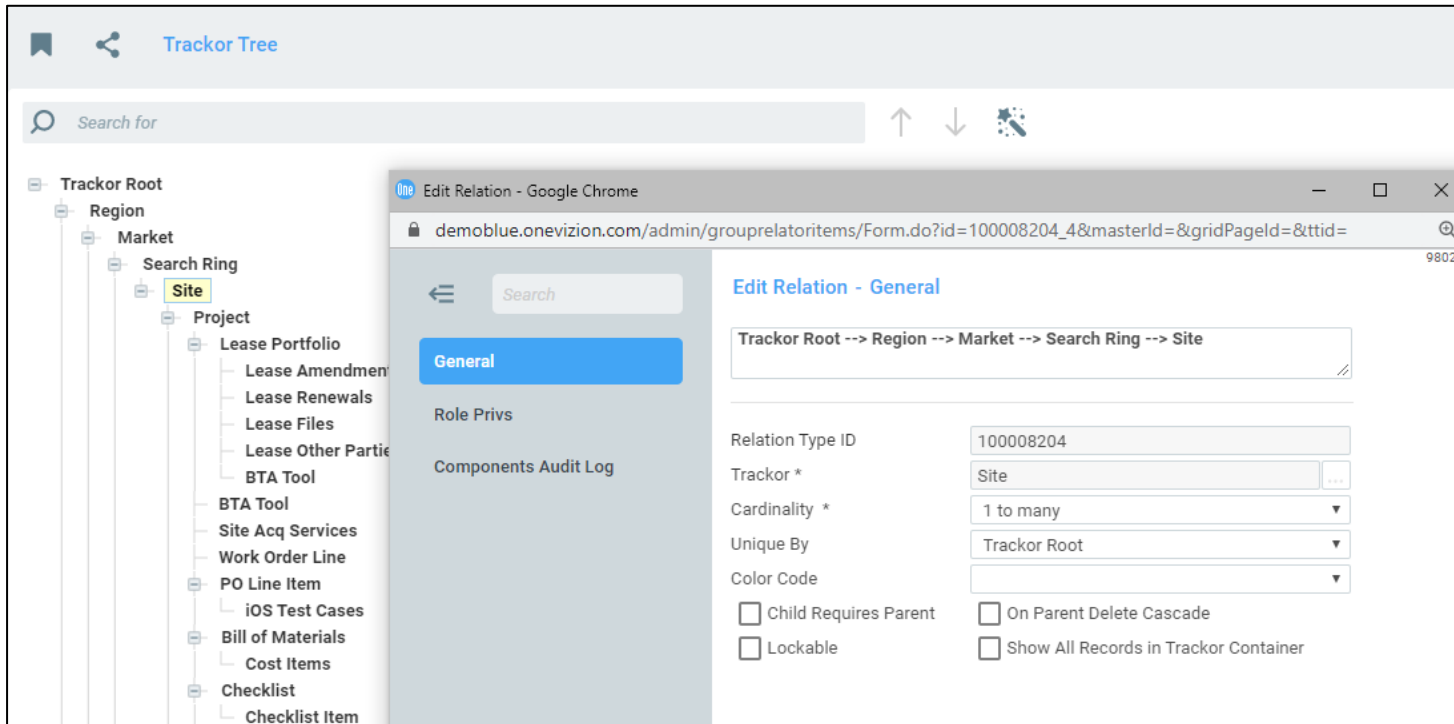
Tracker Item ID	Tracker-type Name
100093207	businessobjective
100091041	Business_Requirements
100091042	Business_Requirements_Instance
100091043	Business_Requirements_Item
100092989	CFComment
100091809	CLIENT_ADDRESSES
100091811	CLIENT_TRACKOR_MAIL
100093327	Campaign
100091565	Case
100093587	CaseAging
100094347	CaseCodeDiff
100091567	CaseComments
10009661	ClientAccess
10009581	Client_Documents
100093268	Conditions
100093012	Config
100093013	ConfigAttrib

The Mapping Tab is used to create the format of the email message. Here the Message Field and Field will be established.

The Tracker Search tab is used for custom SQL in order to return a specific Trackor Record. The System Administrator will set these according to specific needs and requirements.

For more detailed information refer to the [Trackor Mail documentation](#).

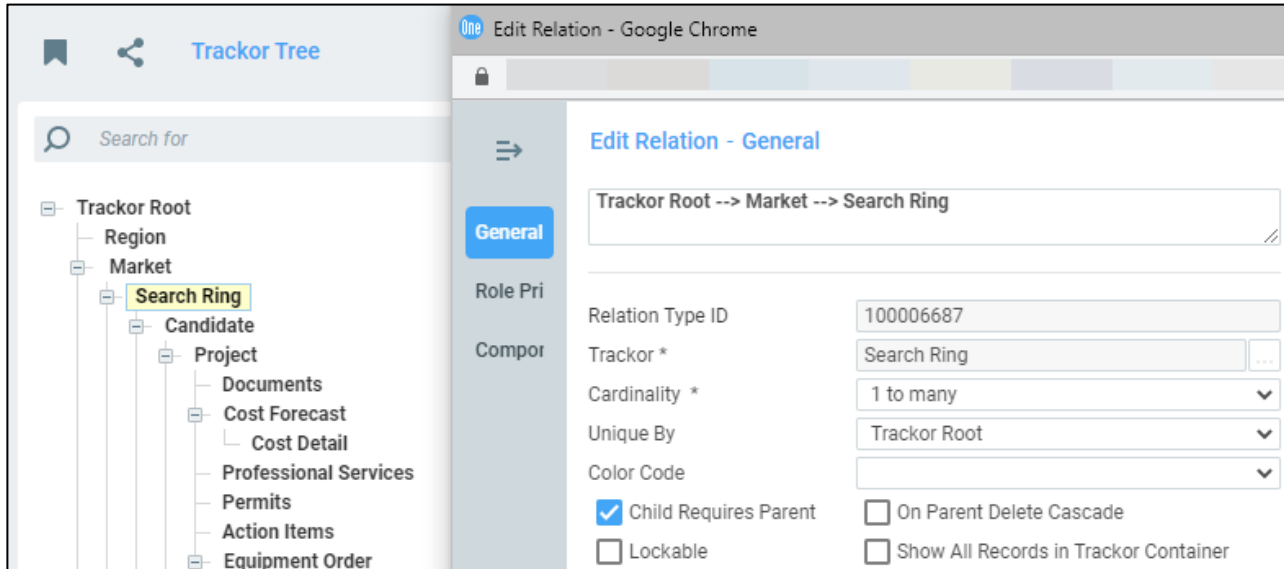
Topic: Tracker Tree



In order for Tracker Types to be both visible and usable, they need to exist in the Tracker Tree. The Tracker Tree shows all of the Tracker Types and their parent/child relationships. Add to the root if Tracker Type has no parent.

- **1 to Many**
 - Easy to add parent fields into view without affecting record count.
 - parent "Site"
 - Adding child fields into view will affect record count since there will be a row per child.
 - children "Doc1", "Doc2", etc.
- **Many to Many**
 - Adding parent or child fields into view will affect record count dramatically.
 - parent "Market"
 - child "User"

Topic: Tracker Tree



The Tracker Tree allows you to expand for grandchildren

- “Show All Records in Tracker Container” is checked. Ex. Document tab on Search Ring would include both children and grandchildren given the relationships below
 - Search Ring=>Documents
 - Search Ring=>Candidates=>Documents.

Warning: Make sure to not create a cycle or you will get unpredictable results like below.

A -> B -> C

A -> D -> C

Tip: Use a Tracker Selector when a relationship might pollute the Tracker Tree.

Fields



Topic: Fields

Add Field - General

Tracker Type *
Accounts

Field Label (#) *
[Text Box]

Color Code
[Text Box]

Field Width (px) *
180

PL/SQL ID Reference
[Text Box]

Description
[Text Area]

Comments
[Text Area]

Mandatory Two Columns Span Lockable Read Only
 Don't Clone Field Value Don't Clone Lock Status Support Barcode Show Expanded List

Purpose of different Data Types

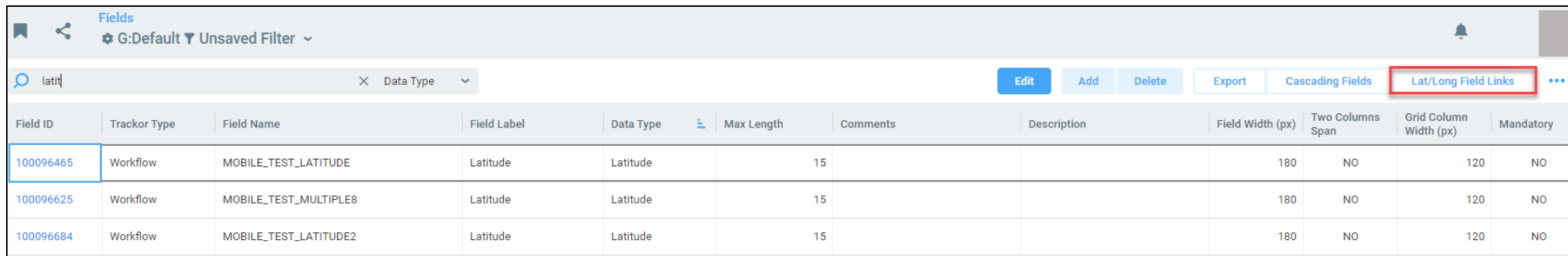
- Drop Downs have a V-Table with only a handful of entries.
- Selectors can have lots of V-Table entries with the ability to search.
- Tracker Selectors can have SQL but always point to a Tracker. So, they have great performance in grids.
- DB Selectors have SQL and can point to anything in the system. For performance reasons, use a Tracker Selector if the SQL points to a Tracker.
- If you chose a color code, the field will no longer be highlighted in the grid for “recently modified” as the color code takes precedence.

Note: Should you re-use an existing V-Table for a new drop-down field? Usually no, because if you add a new value to the V-Table, it will be available to all the other fields. Ex, with Pass/Fail you are asked to add “Pending”.

Topic: Fields

Latitude/Longitude fields must be linked together and can only be done from the Fields page.

- Otherwise the mapping and form control will not work correctly.
- It is easy to forget this step.



The screenshot shows the 'Fields' management interface. At the top, there is a search bar with 'latit' entered and a 'Data Type' dropdown. Below the search bar are buttons for 'Edit', 'Add', 'Delete', 'Export', 'Cascading Fields', and 'Lat/Long Field Links' (which is highlighted with a red box). Below these buttons is a table with the following columns: Field ID, Tracker Type, Field Name, Field Label, Data Type, Max Length, Comments, Description, Field Width (px), Two Columns Span, Grid Column Width (px), and Mandatory.

Field ID	Tracker Type	Field Name	Field Label	Data Type	Max Length	Comments	Description	Field Width (px)	Two Columns Span	Grid Column Width (px)	Mandatory
100096465	Workflow	MOBILE_TEST_LATITUDE	Latitude	Latitude	15			180	NO	120	NO
100096625	Workflow	MOBILE_TEST_MULTIPLE8	Latitude	Latitude	15			180	NO	120	NO
100096684	Workflow	MOBILE_TEST_LATITUDE2	Latitude	Latitude	15			180	NO	120	NO

Topic: E-File Fields

Edit Field - Image Settings

Resize

Resize Mode: Width

Image Width: 1600

Image Height:

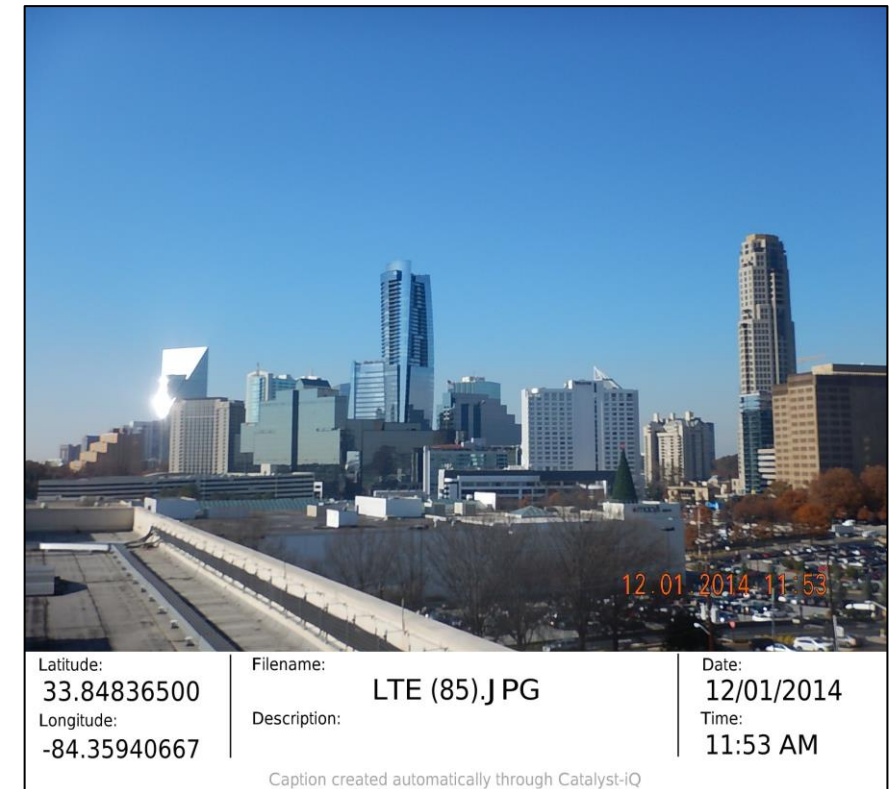
Other

Rotate Using EXIF Orientation:

Log E-File Changes:

Upload files directly to AWS S3:

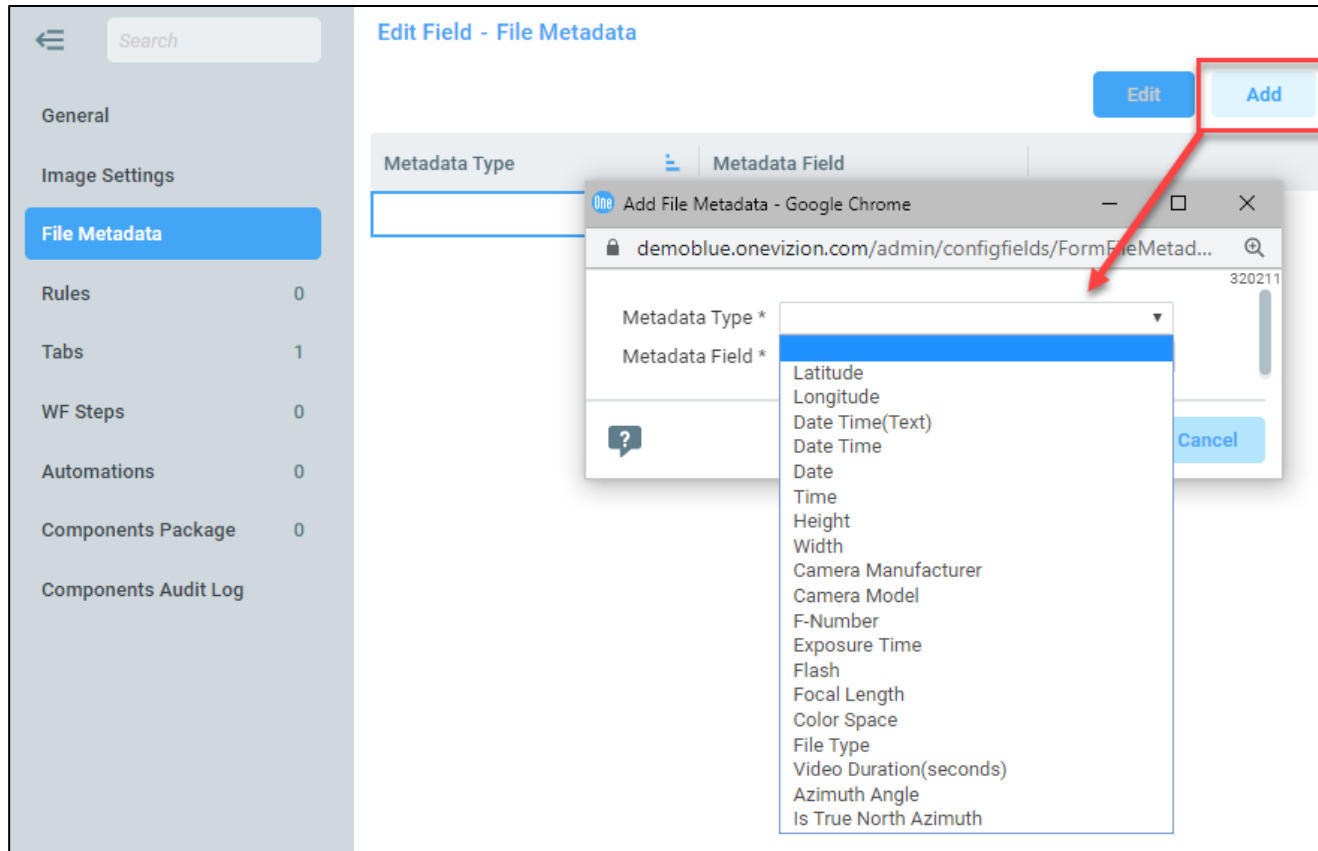
Autocaption Template:



Photos can be automatically resized as they are loaded.

Using the auto-caption template, a section can be added to the photo using values from other Configured Fields.

Topic: E-File Fields



Data about photos can be extracted from EXIF information and stored in separate fields for quality control and the auto-caption template.

The most used are:

- date time
- latitude
- longitude

Topic: E-File Fields

Edit Field - Image Settings

Resize

Resize Mode: Width

Image Width: 1600

Image Height:

Other

Rotate Using EXIF Orientation

Log BLOB changes

Upload files directly to AWS S3

Autocaption Template:

Large files up to 3GB can be loaded directly to S3.

Pros:

- Less space in database before it gets moved to S3.
- Less stress on webserver.

Cons:

- EXIF data will not be captured.

Recommendation – Only use for large files. Suggested > 300MB.

Topic: Fields to be used Selectively

Edit Field - General

Tracker Type *
BackHaul

Data Type *
Calculated

Field Label (#-28837) *
AZI_AZ (* True North)

Field Name *
AZI_AZ

Color Code

Field Width (px) *
180

Color Table

SQL Query

SQL Query - Google Chrome

demoblue.onevizion.com/admin/configfields/FormSql.do?DataType=25&mode=SQL

SQL templates

```
1 select
pkg_config_field_rpt.getAzimuth(pkg_config_field_rpt.getValNumNLByID(:PK,
100172866), pkg_config_field_rpt.getValNumNLByID(:PK,
100172865), 100173835, 100173832, 'AZ')
2 into :RETURN_STR
3 from dual
```

Example: select VALUE_NUMBER*100 into :RETURN_STR from CONFIG_VALUE_NUMBER where CONFIG_FIELD_ID=12345 and KEY_VALUE=:PK

OK Cancel

DB Selectors, DB Drop-down, Rollup and Calculated fields.

- All are expensive on the database because the SQL is handwritten or accesses too many rows.
- Can be ok in a grid of a hundred or so records but there is nothing stopping an export of a million records executing the SQL a million times.
- For small result sets, they are just fine and very useful.

Ex. This field allows you to show the roles assigned to a user in the User Tracker Browser page and tab.

Topic: Selector/Drop-down Fields

Edit Field - General

Tracker Type *
Visio Map

Data Type *
Drop-Down

Field Label (#-29759) *
% Avail in Conduit

Field Name *
SITE_AUD47

Color Code

Field Width (px) *

Table Name *
AVAILABLE

Color Table

Def Value SQL

Description

Comments

Example: select attrib_v_table_value_id, value from attrib_v_table_value where attrib_v_table_id = :table_id and upper(value)=upper('some text')

SQL variables: :program_id, :user_id, :table_id, :tracker_type_id, :parent_id, :parent_tracker_type_id. (:parent_id and :parent_tracker_type_id use 0 if omitted)

OK Cancel

- Use Drop Down for small V-Table.
- Use Selector for large V-Table.
- Both require Table Name
- All configured field have optional "def value SQL".
 - **Note:** This SQL is for the GUI only. API and import ignore this.

Topic: Tracker Selector Fields

Edit Field - General

Tracker Type *
US Cell

Field Label (#-146513) *
RFE

Color Code

Field Width (px) *
180

Table Name *
V_U_RFE3

Color Table

Def Value SQL

Data Type *
Selector

Field Name *
U_RFE

General

Rules 0

Tabs 1

WF Steps 0

Automations 0

Components Package 0

Components Audit Log

- Selector's Tracker Type is the related Tracker Type
- Short Name allows Drill Down Fields
- If Selector's Tracker Type is defined as "Is User", then User in My Things filter can be checked. It affects:
 - Tracker Restrictions
 - My Things in Filter

Topic: Multi-selector Fields

← Search

General

Rules 0

Tabs 1

WF Steps 0

Automations 0

Components Package 0

Components Audit Log

Edit Field - General

Tracker Type *
Site

Data Type *
MultiSelector

Field Label (#-40915) *
Antenna and Tower Installation Equip

Field Name *
S_ACCESS_ANT_INST_EQUIP

Color Code

Field Width (px) * 180

Lines Qty 2

Table Name * TOWER INSTALL EQUIPMENT ...

Color Table

Def Value SQL

Description
List the Conditions or Equipment Required for Antenna Delivery and Installation.

Comments

Mandatory Two Columns Span Lockable Read Only
 Don't Clone Field Value Don't Clone Lock Status Support Barcode

- Table Name is required
- Lines Qty = 1 will comma separate chosen items.
- Lines Qty > 1 will put chosen items on separate lines.

Topic: Cascading Fields

Edit Field - General

Tracker Type *
Case

Field Label (#-19653) *
Component

Color Code

Field Width (px) *

Table Name * ■
VQS_IT_COMPONENT

Color Table ■

PL/SQL ID Reference
Out Of Sync

Def Value SQL

Description

Comments

Mandatory
 Don't Clone Field Value

Validation Tables - Google Chrome

Search for Value ID

Value ID	Order Num	Value	Label	Color	Display?	Filterable?	In Use
100097226	1	Admin	Admin		YES	YES	YES
100097212	2	AG	AG		NO	YES	YES
1000910193	3	Android	Android		YES	YES	YES
100097872	4	API	API		YES	YES	YES
100097612	5	Audit	Audit		YES	YES	YES
100097214	6	BPDocs	BPDocs		YES	YES	YES
100097213	7	BPL	BPL		YES	YES	YES
1000913802	8	Chat	Chat		YES	YES	YES
1000910236	9	Clone	Clone		NO	YES	YES
1000911197	10	CodeQ	CodeQ		YES	YES	YES
1000910195	11	CompPack	CompPack		YES	YES	YES
100097222	12	Conf	Conf		YES	YES	YES
1000911115	13	CReq	CReq		NO	YES	NO
100099953	14	Dash	Dash		YES	YES	YES
100097892	15	DB	DB		YES	YES	YES
100099813	16	Depl	Depl		YES	YES	YES

Cascading Fields are where one drop down field restricts the choices of another drop down field.

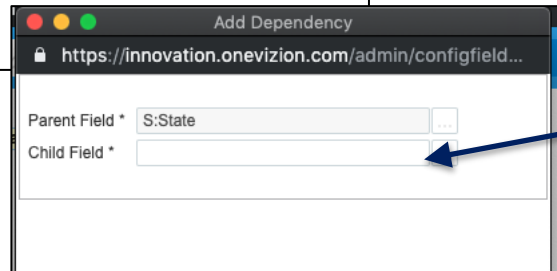
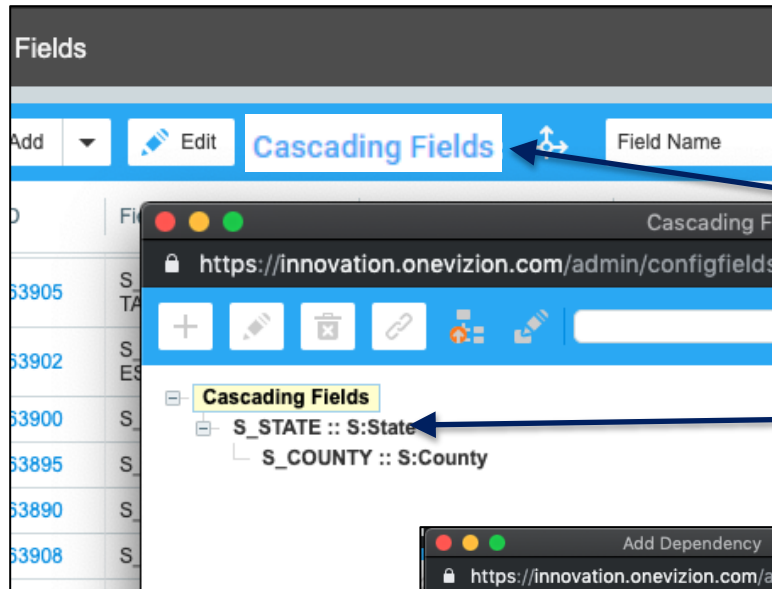
This example is for State and County.

- Create the State field and load the 50 states in.
- Create the County field and load the counties in.

Note: There is an import for loading V-Table values and is covered in another training deck.

Note: If 2 fields are configured as cascading fields and only one is in a grid or tab, that field will be read-only.

Topic: Cascading Fields (Dependent Fields)



Steps for Linking Fields

1. Click Cascading Fields Maps
2. Select S_STATE. Click the add button
3. Choose Child Field of S_COUNTY and click OK.

Note: The parent of S_STATE can have multiple children fields and the children fields can have children.

Note: In order to create **Dependent Fields**, you must first select the Data Type of Drop-Down and then set up a **V-Table** containing the properties (choices) for the Fields.

Topic: Cascading Field Linking Via CSV

Import Method

Import new data. Create new links only.
 Import all data. Remove existing links and create all from file.

Import non-existent VTable values/Trackor Classes

Choose File No file chosen Import CSV

Expected CSV Columns:
PARENT_FIELD, PARENT_VALUE, CHILD_FIELD, CHILD_VALUE
Use comma to separate values in CSV file

Search for

- VTable values
 - Fixed-Price
 - Milestone Completion
 - Other (Explain in T&Cs)
 - Upon Final Acceptance
 - Upon Project Start
 - No Charge
 - Other (Explain in T&Cs)
 - Other (Explain in Comments)
 - Other (Explain in T&Cs)
 - Recurring
 - Annually
 - Bi-Annually
 - Milestone Completion
 - Monthly
 - Other (Explain in T&Cs)
 - Quarterly
 - Time and Materials
 - Milestone Completion
 - Monthly

?

Close

If you have a large amount of values, you can import a CSV by clicking “Import Value Relations from CSV”. [Import Relations](#)

Here you have some options and the text explains them well. After importing you can see results below.

Tab Design



Topic: Tab Design

- A Tab is a collection of fields to support a Team.

Fields can be dragged from the list below and dropped in the form designer.

Form Designer.

Edit Tab - General

Fields | Task Dates | Drill-Down Fields | Markup

Tracker Type * Parts | Label #-25030 * | General Info | Name * BILL_OF_MATERIALS_OLD_GEN

Fields 2.4K | Search | Create Field

BH:EIRP (dBm) (Z)	NUMBER
C:Candidate Type	DROPDOWN
C:Circuit DIA (MBPS)	TEXT
C:Dragonwave Received	DATE
S:Latitude (DEC)	TEXT
C:(L3) SNMPc Managed	TEXT
C:Set Defaults?	DROPDOWN
C:Total MW Radio Modem RU (Required)	NUMBER

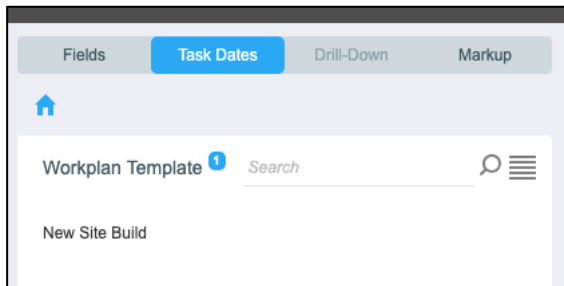
C:Cand ID *
BH:Link ID *
PT:ID *
PT:Part Job (DB) ...
PT:OV Part Number ...
PT:Manufacturer
PT:Part Status
PT:Part_Qty *
PT:Part Candidate ID ...
PT:Part Type
PT:Mfg Part Number
PT:Part Status Date
PT:Part Creation Date

Topic: Tab Design

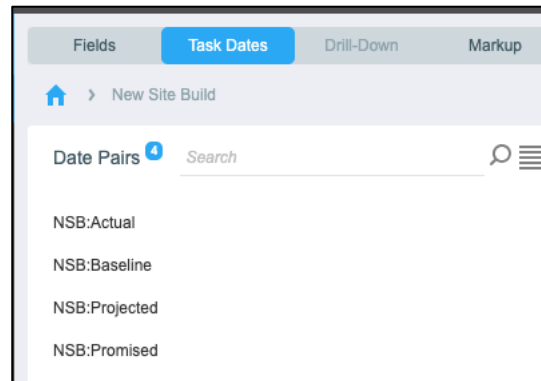
Tasks can be added to Tab also.

Note: The Task Dates Tab will only become visible when the Field is associated with a WorkPlan. Here users are able to choose the dates for Fields which are "Date" Data Type.

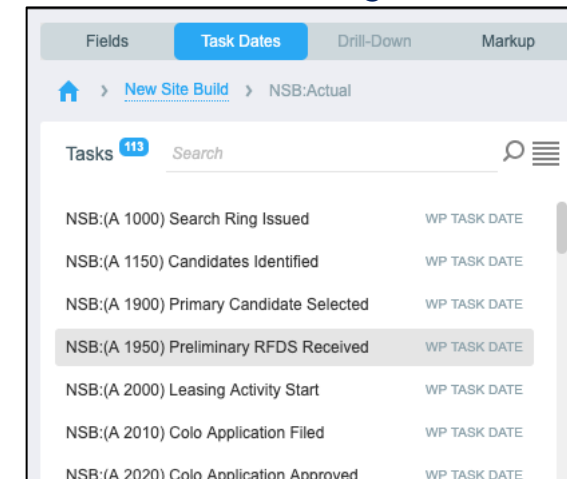
1. Choose Workplan Template



2. Choose Date Pair.



3. Choose Task and drag to Form Designer



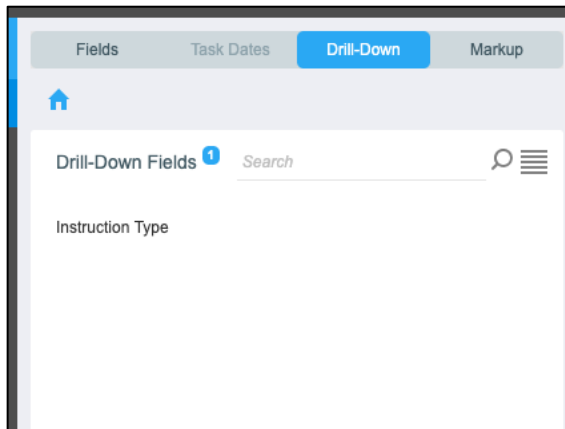
Topic: Tab Design

Training Objectives:

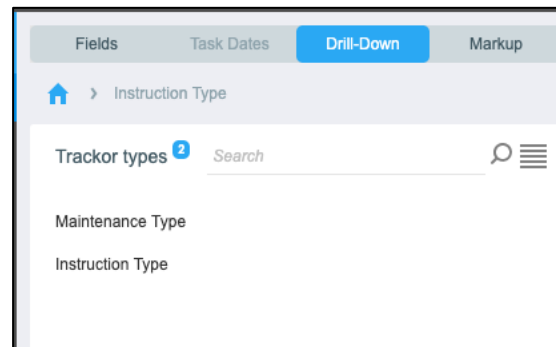
■ Drill Down Fields on a Tab

When a Tracker Selector is on a tab and has a Short Name, fields on tabs on the related Tracker Type can be added to the tab. They are called Drill Down Fields.

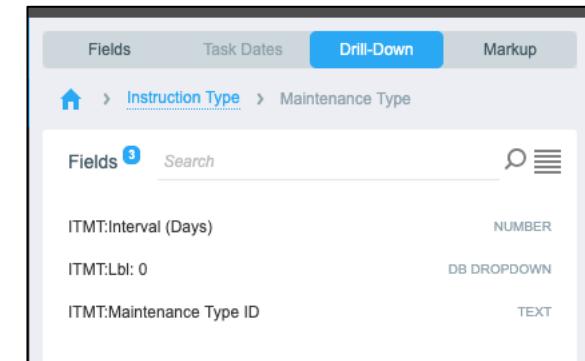
1. Choose Tracker Selector Field



2. Choose Tracker Type



3. Choose Field and drag to Form Designer



Note: The Form Designer will not display drill-down fields if Tracker Type is not assigned to Tracker Tree.

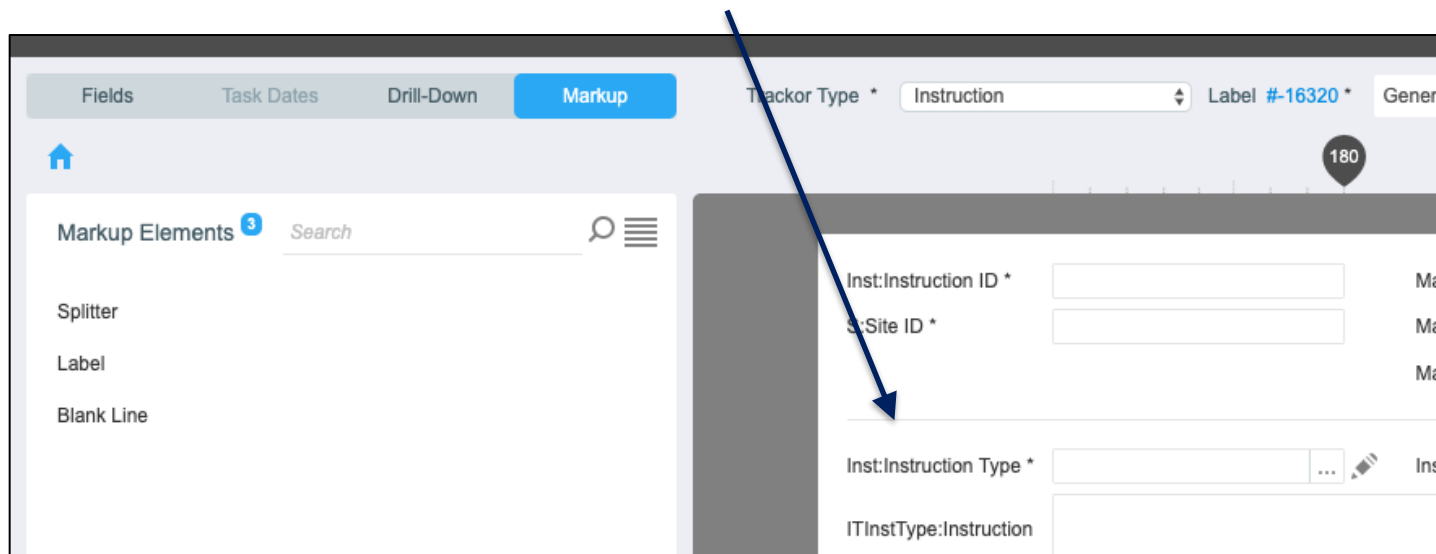
Topic: Tab Design

Training Objectives:

- Markup Fields on a Tab

Markup Elements include Splitters, Labels and Blank Lines. Splitters and Blank can be used to improve appearance of the tab. Labels can be used for instructions or naming sections.

Example of Splitter



Applets



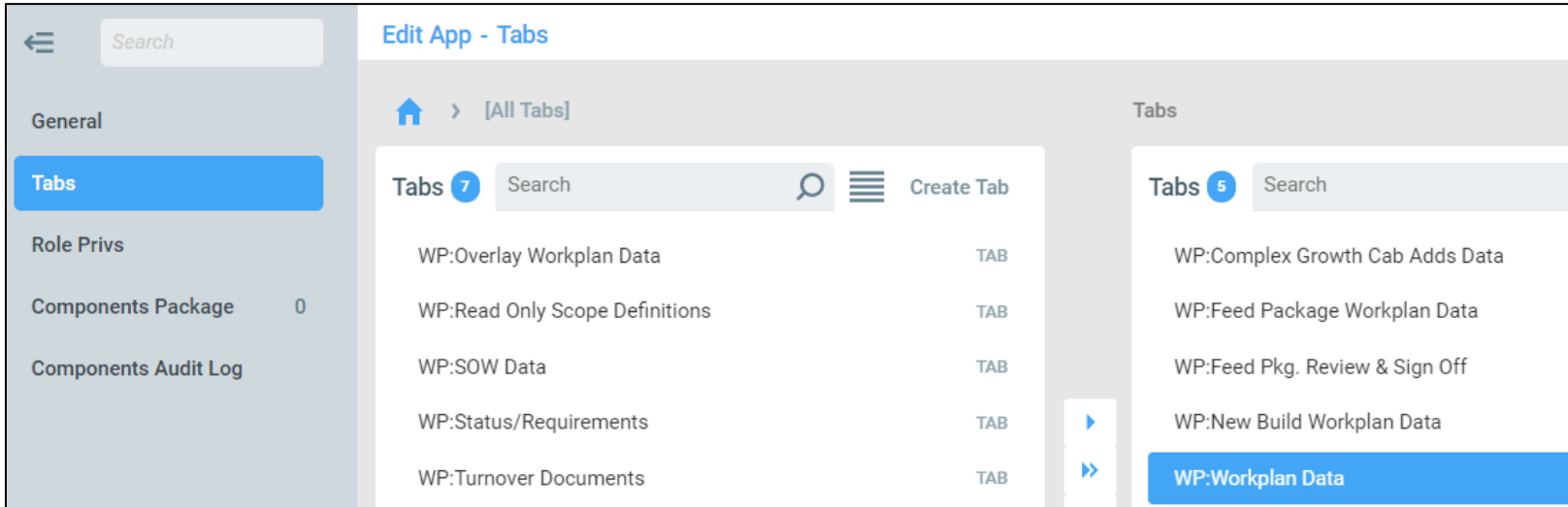
Topic: Applets

The screenshot shows the 'Edit App - General' configuration page in the OneVizion interface. On the left is a sidebar menu with options: General (selected), Tabs, Role Privs, Tracker Classes, OneVizion Pages, Components Package (0), and Components Audit Log. The main content area is titled 'Edit App - General' and contains the following fields:

- Applet Name:** Text input field containing 'Case'.
- Applet Label (#-18886) *:** Text input field containing 'Case'.
- Tracker Type *:** Dropdown menu with 'Case' selected.
- App Icon *:** A button labeled 'Assign' next to a blue icon representing a list or table.

- An applet is a collection of Tabs designed to collect data to accomplish a business purpose.
- An applet is automatically created when you create a Tracker Type and has a General Info tab.
- Can have more than one Applet to avoid having too many tabs on the main Applet and consolidate relevant Tabs to a team or department.

Topic: Applets



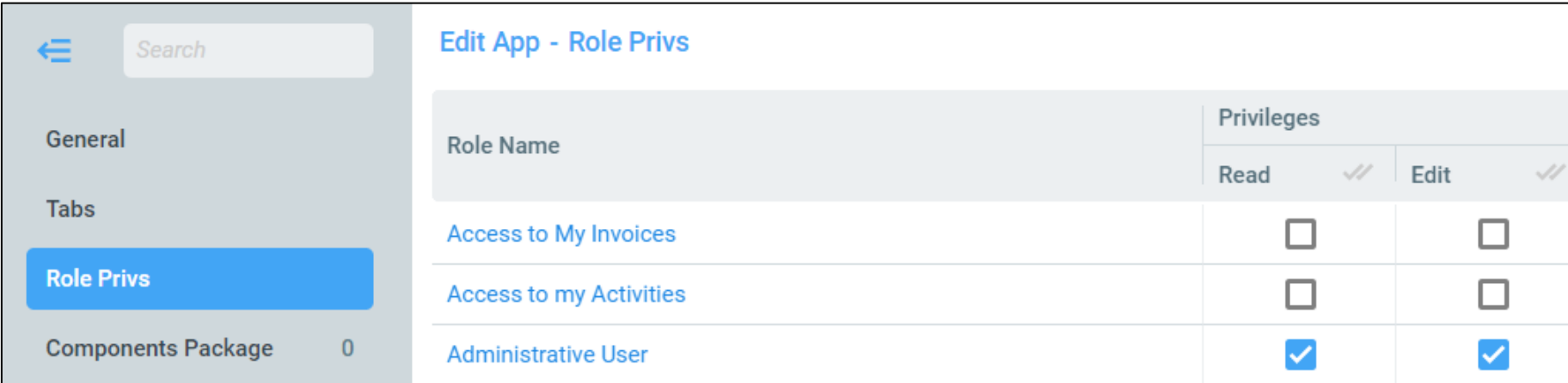
- Workplan tab allows adding and modifying workplans.
- Child Trackors can be added as a tab to have a filtered Tracker Browser. This is called a Tracker Container.
- Team or Department level Tabs can be added have all fields relevant to task organized together.

Note: When loading the form, if the sum of tabs from all trackor types is less than 1000, a list of all tabs will appear. If the number of tabs is more than 1000, then the list of tabs of the primary trackor type will appear.

Note: Applets are Published by default when created.

Topic: Applets/Role Privs

- The Role Privs tab contains the Security Privileges for each Security Role for the Tab.
- Permissions can be set here as well as on the Administer Role page.



The screenshot shows the 'Edit App - Role Privs' page. On the left is a sidebar with a search bar and navigation tabs: 'General', 'Tabs', 'Role Privs' (selected), and 'Components Package 0'. The main content area is titled 'Edit App - Role Privs' and contains a table with the following data:

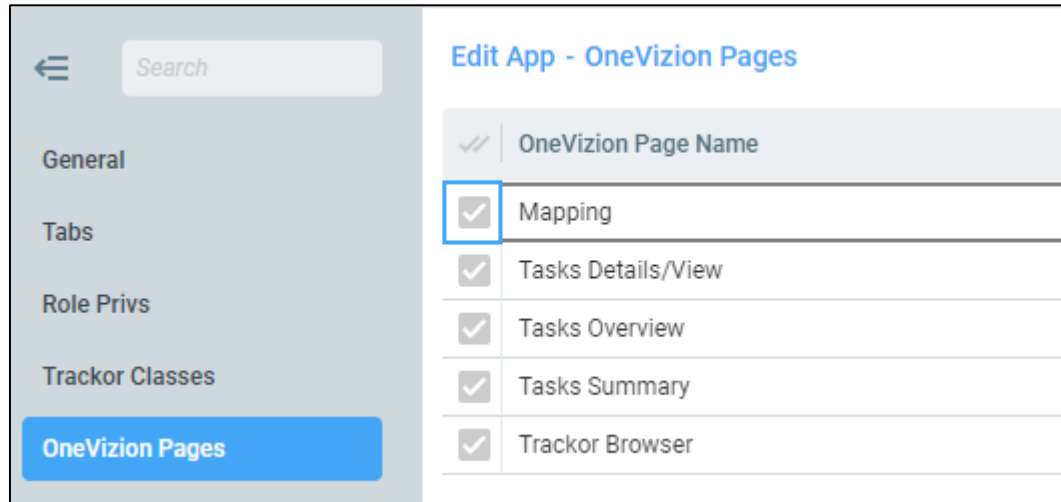
Role Name	Privileges	
	Read	Edit
Access to My Invoices	<input type="checkbox"/>	<input type="checkbox"/>
Access to my Activities	<input type="checkbox"/>	<input type="checkbox"/>
Administrative User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Topic: Applets/Tracker Classes

<input checked="" type="checkbox"/>	Class Name
<input checked="" type="checkbox"/>	B
<input checked="" type="checkbox"/>	QGP
<input checked="" type="checkbox"/>	S

- Tracker Classes can be set here as well as on the Class X-Ref page.

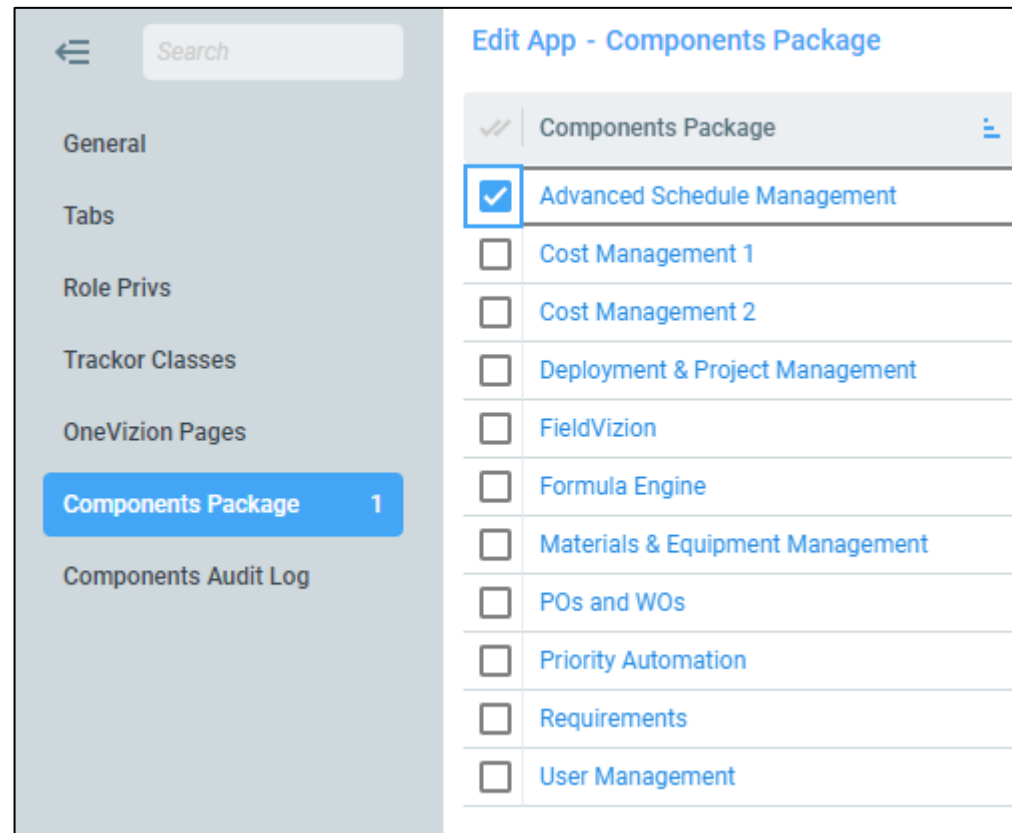
Topic: Applets/OneVizion Pages



- Controls which pages the applet will be shown.

Topic: Applets/Components Package

A tracker type or rule or DB package can be assigned to multiple Component Packages. For example, an Account will need to be part of the Case Management System and Professional Services Automation.



Views and Filters



Topic: Views and Filters

Configuring View in Tracker Browser

- Fields, Task Date and Drill Down fields can be added to the view columns on the right.
 - If tasks or drill down fields are not configured for this Tracker Type, the button disappears.
 - If Fields list grows to greater than 3000, then it will force the user to choose Tracker Type first.

The screenshot displays the configuration interface for a Tracker Browser view. It is divided into two main panels: 'Fields' on the left and 'Columns' on the right.

Fields Panel: This panel is titled 'Tracker types' and contains a search bar and a list of tracker types. The list includes: Action Items, Asset Leasing, Bill of Services, BOM, Candidate, CF Distribution, Change Order, Checklist, Checklist Group, Cost Forecast, Customer, Documents, Entity, Equipment Order, Fiber Line, Fiber Segment, Issue Report, Lease Tracker, Market, Permits, PO Line, Professional Services, and Program. A search icon is visible in the top right corner of the list.

Columns Panel: This panel is titled 'Columns' and shows a list of 63 columns. The first column, 'P:Project ID', is selected and highlighted in blue. Other columns include: P:Project Status, P:Project Phase, P:Next Incomplete Milestone, P:Days to Construction Start, P:Days to On-Air, P:Project Type, P:Schedule Status (baseline), P:AZP/NTP Gating Items, P:Ready to Build, P:Construction Gating Items, P:Project Manager, P:General Contractor, P:Approved Cost Forecast, P:Project Priority, CL:Customer Name, PGM:Program ID, and M:Market. Each column has a data type indicator on the right, such as [DROP-DOWN], [TEXT], [NUMBER], [MULTISELECTOR], [TRACKER SELECTOR], or [CHECKBOX].

Below the columns list, there are configuration options: 'Group By' (a dropdown menu), 'Sort By' (a dropdown menu with 'P:Project ID' selected), and a 'Compact' toggle switch. At the bottom right, there are buttons for 'Save G:Project Portal View as: Unsaved View', 'OK', and 'Cancel'.

Topic: Views and Filters

Configuring View in Tracker Browser

The screenshot shows the 'Columns' configuration window in Tracker Browser. At the top, it says 'Selected 13 of 30'. Below that is a search bar and two icons: a star with '2' and a refresh icon with '4'. The main list contains the following columns:

Column Name	Field Type
* S:Site ID	TEXT
* P:Program Name	TEXT
J:Job ID	TEXT
J:Job Class	DB DROPDOWN
J:Job Phase	DROPDOWN
J:Job Type	DROPDOWN
J:Job Latitude	LATITUDE

At the bottom, there is a sorting section with two dropdown menus:

- The first dropdown is set to 'J:Job ID' and has a sort icon (three horizontal lines) to its left.
- The second dropdown is labeled 'Select column for sorting'.

Annotations with arrows point to the following elements:

- 'Number of frozen columns (2)' points to the star icon with '2'.
- 'Highlight recently changed fields (4 days)' points to the refresh icon with '4'.
- 'Sort columns' points to the sort icon on the 'J:Job ID' dropdown.
- 'Sort ascending or descending' points to the dropdown menu for selecting the column to sort.

Topic: Views and Filters

Training Objectives:

- Using Row Editor Fields in Tracker Browser

Field	Operator	Value
J:Job Type	<=>	Back-up Generator; Carrier A...
J:Project Manager	=	
J:Job Start Date	<=Today	0 Days

Choose a field to filter by

Choose an operator

Choose value to filter by

- If a field is listed twice, it is "or" logic.
- All other fields are "and" logic.

Row Editor



Topic: Row Editor

Configuring Row Editor Fields in Tracker Browser

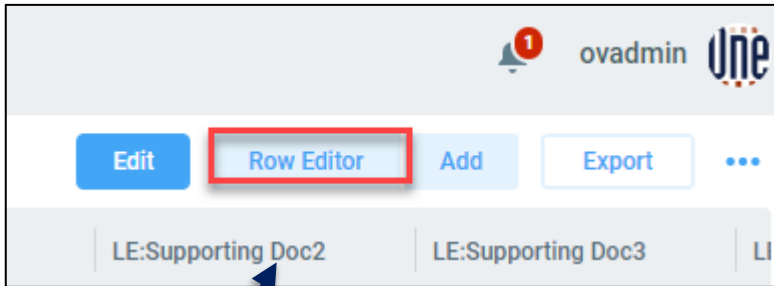
The screenshot displays the 'View Options' window for configuring row editor fields. The URL is <https://innovation.onevizion.com/viewopts/tb/Current/Form.do?id=1005716>. The interface has tabs for 'Fields', 'Task Dates', 'Markup', 'Columns', and 'Row Editor Fields'. A 'Reset Layout' button is visible in the top right. On the left, a 'Fields' list shows 129 fields, with 'Cl:Cost Item Class' selected as a 'DB DROPDOWN'. The main area shows a grid of fields for the row editor, including:

S:Site ID *	DB DROPDOWN	P:Program Name *	TEXT
J:Job ID *	TEXT	J:Job Class	TEXT
J:Job Phase	DB DROPDOWN	J:Job Type	TEXT
J:Job Latitude	TEXT	J:Job Longitude	TEXT
J:Job Start Date *	DATE	P:Program Manager	TEXT
J:Project Manager	TEXT	J:Site Acquisition Manager	TEXT
J:Construction Manager	TEXT		

- By default, the columns are the same in the column list and the row editor fields.
 - After selecting row editor fields, the user can add, remove, add splitters etc. effectively making his own tab from existing fields.
- This can be saved as a local or global view and shared.

Topic: Row Editor

Using Row Editor Fields in Tracker Browser



Click Row Editor

- The arrow button navigates the Tracker records. Shortcut keys are:
 - ctrl+s = Save
 - ctrl+left = Left Arrow
 - ctrl+right = Right Arrow

Grid Row Editor

LE:LE ID: 10002

LE:Learning & Enablement Class: General OneVizion Training

LE:Learning Aid Name: Fundamentals

LE:External Link: <https://onevizion.atlassian.n>

LE:Description

LE:Document: Fundamentals 20.17.1.pdf

LE:Last Updated: 10/02/2020

LE:Supporting Doc1

LE:Supporting Doc2

LE:Supporting Doc3

LE:Supporting Doc4