Navigation

ONESolution User Guide

11.11

SUNGARD® PUBLIC SECTOR

Connect the Community ★★★★★

ONESolution Navigation

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Non-Disclosure Statement

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Section 1.   Desktop Introduction and Overview

The **Desktop** act as a single entry point for the **ONE**Solution customers, and is the main access window for the **ONE**Solution application suites and is designed in a generic way and allows you to design the layouts to satisfy your specific requirements. You can customize the desktop to meet your specific prerequisites. The **Desktop** window is divided into three sections.

Top panel

The top panel displays the following:

- ONESolution Logo
- Search Field
- Help Icon *(Help is context-sensitive)*

Dashboard

The dashboard area displays the components depending upon the layout configuration and you can use the Desktop to create and manage the components.

The "*dockable*" feature allows you to reorganize the orientation of the dashboard components:

- You can select the panel and drag the panel to get the direction arrows.
- Drop the panel that needs to be arranged to the respective direction arrows.
- You can select the panel and drag and drop it to any direction to arrange them.
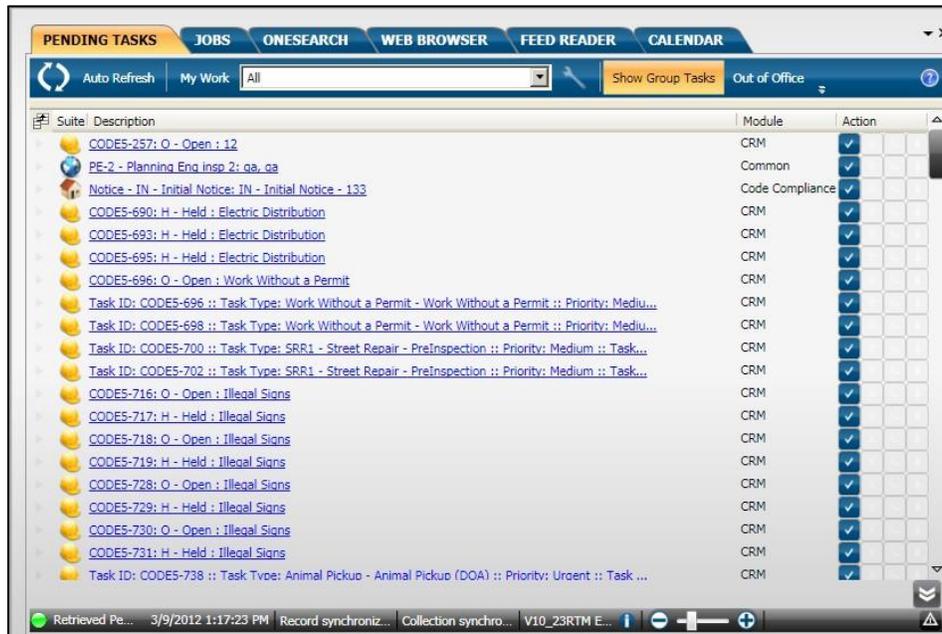
Bottom Panel

The bottom panel displays the global list of various suites available in the ONESolution product line.

You can click any suite icon to display the application specific *Entry Points* pop-up window.

You can view the various application specific entry points organized as folders and hyperlinks in this pop-up.

You also can view the options to manage the Desktop components and layouts in the bottom panel.

The **Desktop** icon on the bottom panel of the Desktop window allows you to create layouts, select the components, and configure global Desktop settings. Depending on the layout and the components selected, the dashboard displays the various elements available.

Default layouts and components will be set by the administrator and depending on the security privileges; you can design your own layout for the desktop.

You can click the *Desktop* icon to open the **Manage Desktop** window. The Manage Desktop window has three tabs:

- ✓ **Layouts** - Use this tab to define the menu to add the entry points and select the components.

- ✓ **Components** - Use this tab to define the common and configurable resources.

- ✓ **Settings** - Use this tab to define the user settings and configuration for the application suites.

Section 2.   Working with Desktop Layouts

You use the **Layouts** tab to design the dashboard using available components and custom folders and tabs. You can customize and design the layouts using the options available in the **Menu** and **Components** tab.

- Objectives:

At the completion of this lesson you should be able to create a Desktop layout

- Target Audience:

Information Services Supervisor

Information Services Administrator

- Prerequisites:

Working knowledge of Windows

Part 2.01 - Creating Custom Layouts

You can customize and design the layouts using the options available in the **Layout Menu** and **Layout Components** tabs. You use layouts to define what you want to see on the Desktop. You can create a layout to include different components and menus or tabs for entry points.

Your organization can configure different layouts for different type of users like permit clerks, cashiers, or plan reviewers. You use the **Layouts** tab to select the components and organize the entry points into tabs.

To create a custom layout, complete the following steps:

1. Click the *Desktop* icon to open the **Manage Desktop** window.

2. The **Manage Desktop** window displays.
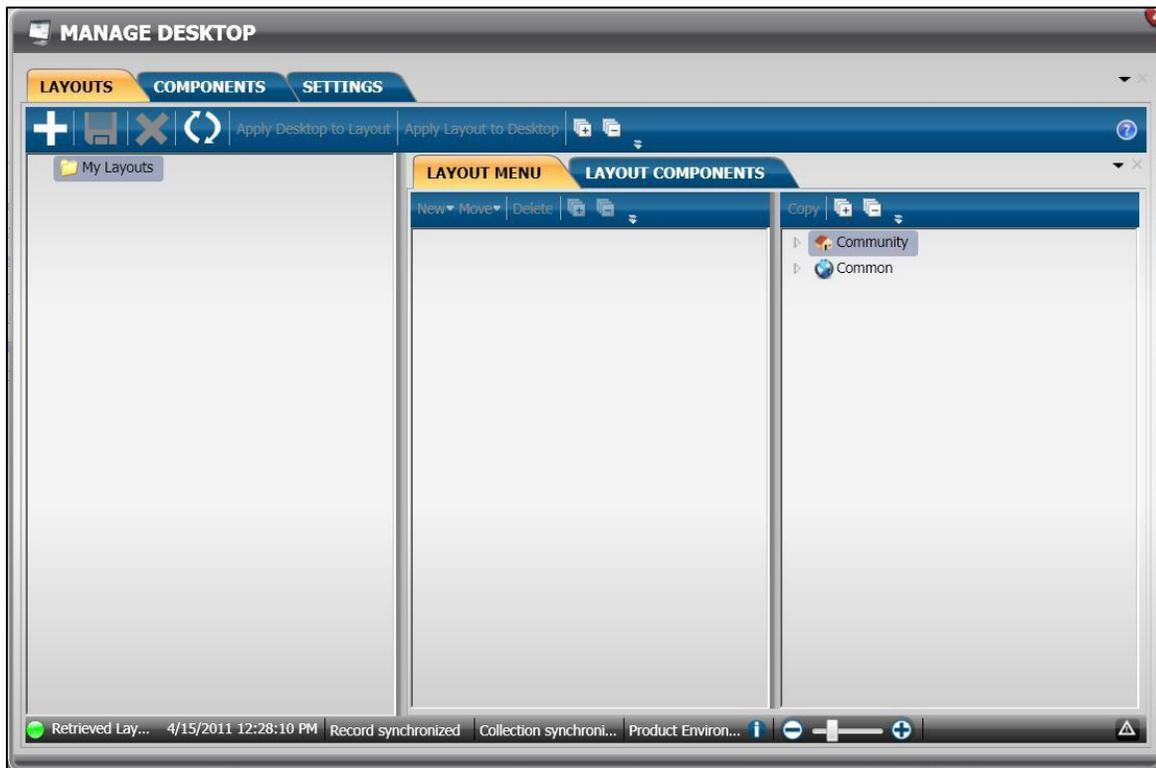
3. Click ![+] to create a new layout.

4. A new layout record displays under the **My Layouts** folder. *(Initially the layout name displays as "My Layout #'X' followed by the layout number.)*

5. A new tab record called **My Tab #1** is created under the **Layout Menu** tab. *(This tab will automatically include the first folder.)*
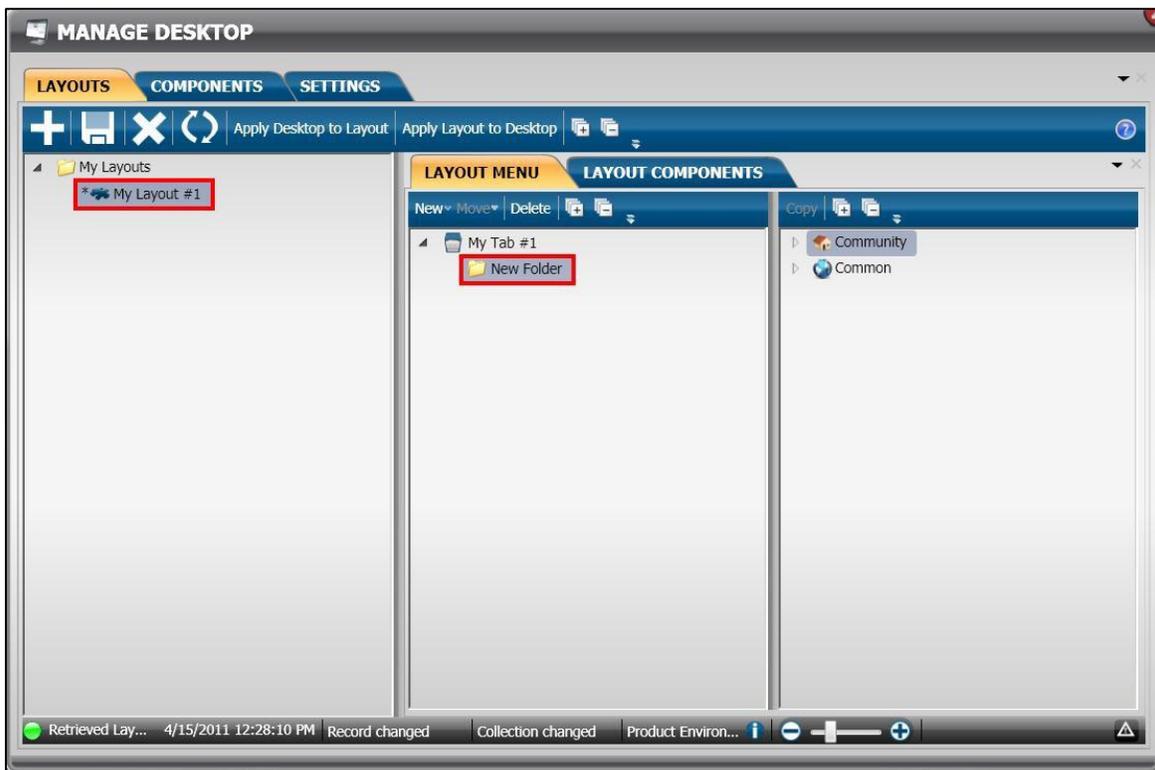

6. Right click on **My Layout #1** and select **Rename**. *(For this example the layout is named **Inspections**.)*

7. Click **Save** ![save].

Part 2.02 - Building the Layout Menu

In the **Layout Menu** tab, you will select the required entry point from the suite site map in the right panel. You can group the entry points under folders or sub-folders based on the application or the functionality.

1. Go to the **Layout Menu** tab.

2. Right click on **My Tab #1** and select **Rename**. *(For this example the tab is named Inspections.)*

3. Click **Save**.

4. Click **Apply Layout to Desktop** Apply Layout to Desktop.

5. Click **Close** to return to the desktop.

6. The **Desktop** now displays a new tab.
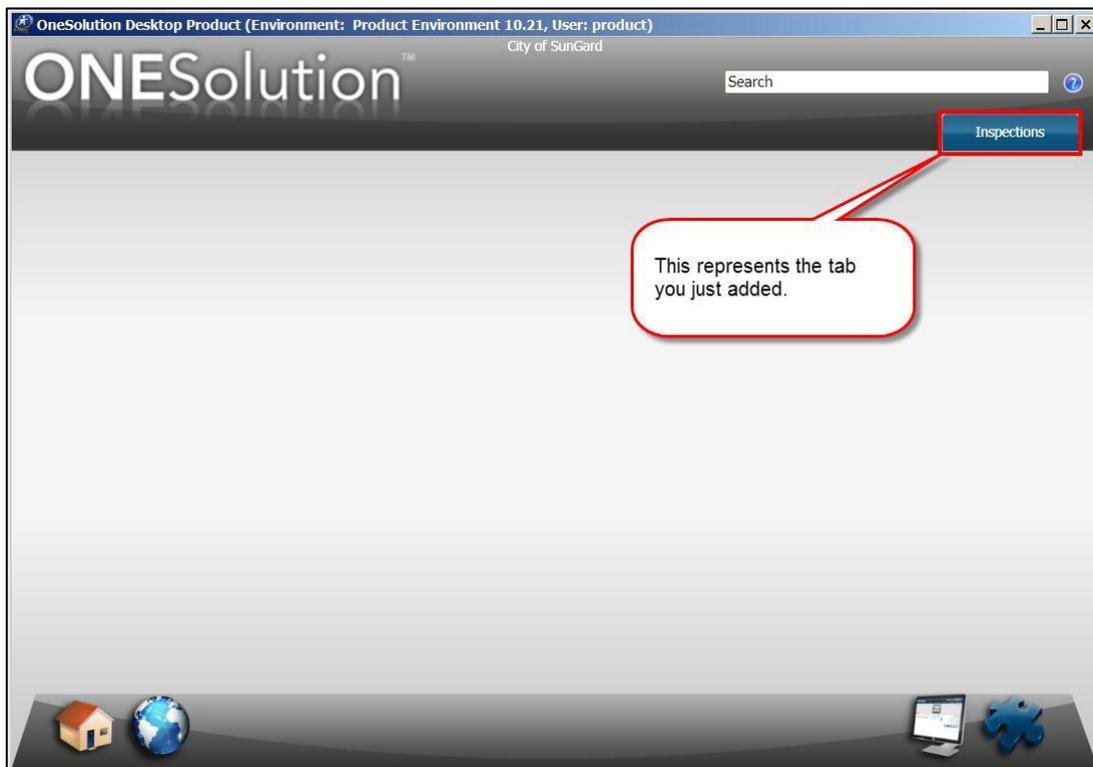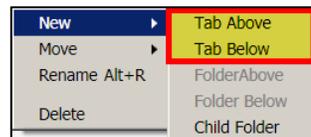
Part 2.03 - Adding Additional Tabs

You can add additional tabs or folders to organize your entry points. To add a new tab, click on an existing tab to enable the **Tab Above** and **Tab Below** options.
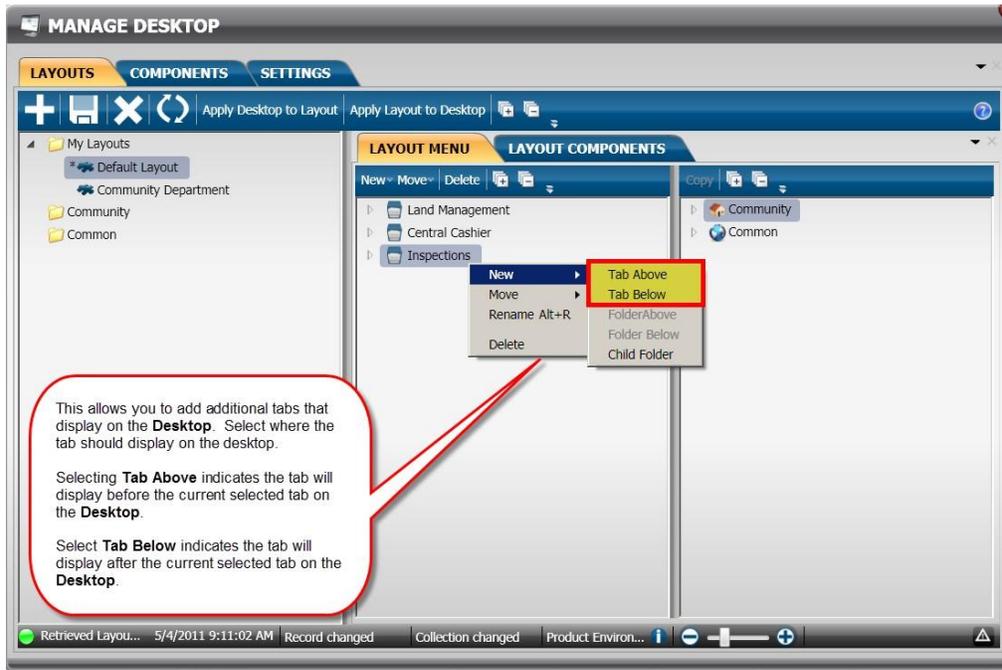

To add a new tab, complete the following:

1. Click the *Desktop* icon ![icon] to open the **Manage Desktop** window.

2. The **Manage Desktop** window displays.

3. Go to the **Layout Menu** tab.

4. Highlight the tab level to indicate where the next tab is to be placed.

5. Right click and select **New**.

6. Select **Tab Above** or **Tab Below** ![icon]. *(Selecting **Tab Below** places the tab last. For this example **Tab Above** was used.)*
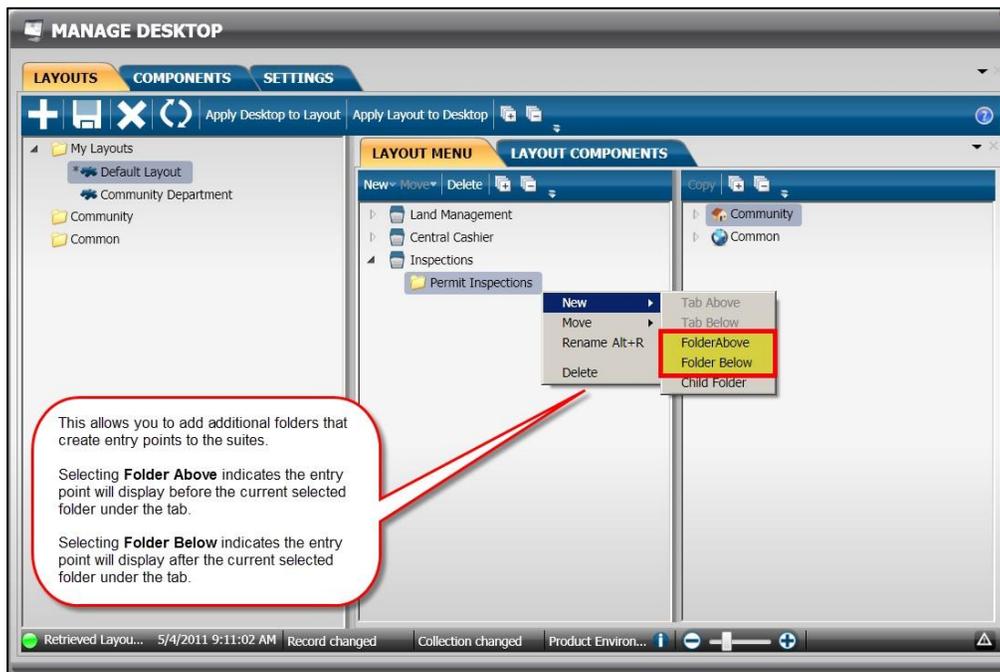
7.   Right click on **My Tab #1** and select **Rename**. *(For this example the tab is named Central Cashier.)*

8.   Click **Save** 💾 .

9.   Click **Close** ❌ to return to the desktop.

10.   The newly added tab is displayed on the desktop.
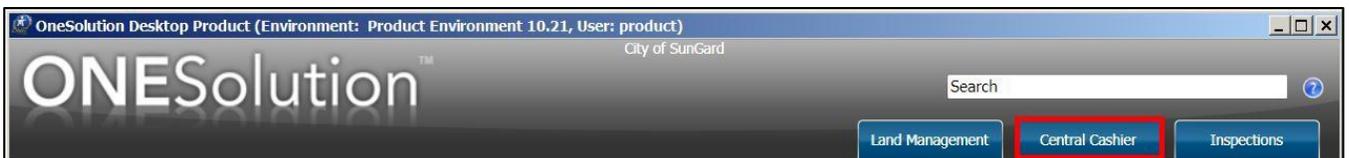
Part 2.04 - Adding Folders to a Tab

You can add additional tabs or folders to organize your entry points. To add a new folder, click on an existing folder to enable the **Folder Above** and **Folder Below** options. As each tab is added a folder is automatically added and should be renamed.

Folders can be added directly under the tab level or under other folders. To add a folder over or under another folder, make sure the folder is selected before clicking **New**.

Renaming the Folder

To rename the folder, complete the following:

1.   Right click on **New Folder 1** and select **Rename**. *(For this example the folder is renamed*

Permit Inspections. *As new folders are added it is sequentially numbered and should be renamed.)*

2. Click **Save** .

To add another folder, complete the following:

1. Click the *Desktop* icon to open the **Manage Desktop** window.

2. The **Manage Desktop** window displays.

3. Go to the **Layout Menu** tab.

4. Highlight the folder level to indicate where the next folder is to be placed.

5. Right click and select **New**.

6. Select **Folder Above** or **Folder Below** . *(Selecting **Folder Below** places the folder last. For this example **Folder Above** was used.)*

7. Right click on **New Folder 'X'** *('X' represents a sequential number.)* and select **Rename**. *(For this example the folder is named **Code Compliance Inspections**.)*

8. Click **Save** .

9. Click **Close** to return to the desktop.

10. Click the tab on the desktop to display the folder.

Part 2.05 - Adding Entry Points

After you have created your tabs and folders, you can now add the entry points. These entry points provide you access to the applications.

1.   Click the *Desktop* icon to open the **Manage Desktop** window.

2.   The **Manage Desktop** window displays.

3.   Go to the **Layout Menu** tab.

4.   On the right side of the panel the entry points are grouped by:

   - **Community** – this contains the entry points for the Building Permits, Code Compliance, Planning & Engineering and Business Account Management.

   - **Common** - this contains the entry points for Common Code Administration and Cash Receipts.

5. To copy entry points from a suite, double-click to expand **Community**. *(**Note:** You can copy all entry points per application, or individual entry points. You can also mix the suite entry points as needed to the tabs you are creating.)*
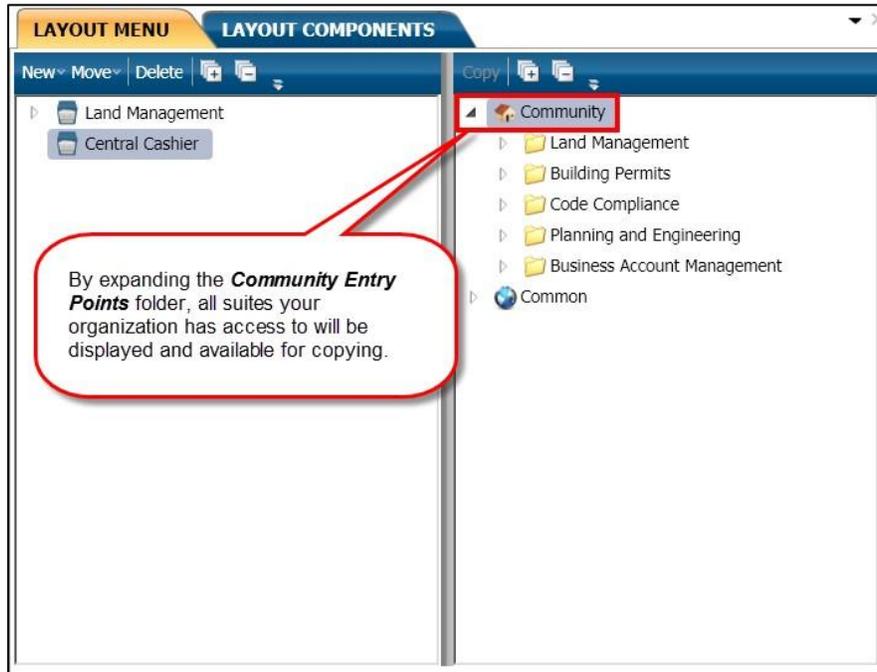

6. To copy entry points from the common components, double-click **Common** to access the entry points for common processes and common codes. *(**Note:** You can copy all entry points per application, or individual entry points. You can also mix the application entry points as needed to the tabs you are creating.)*
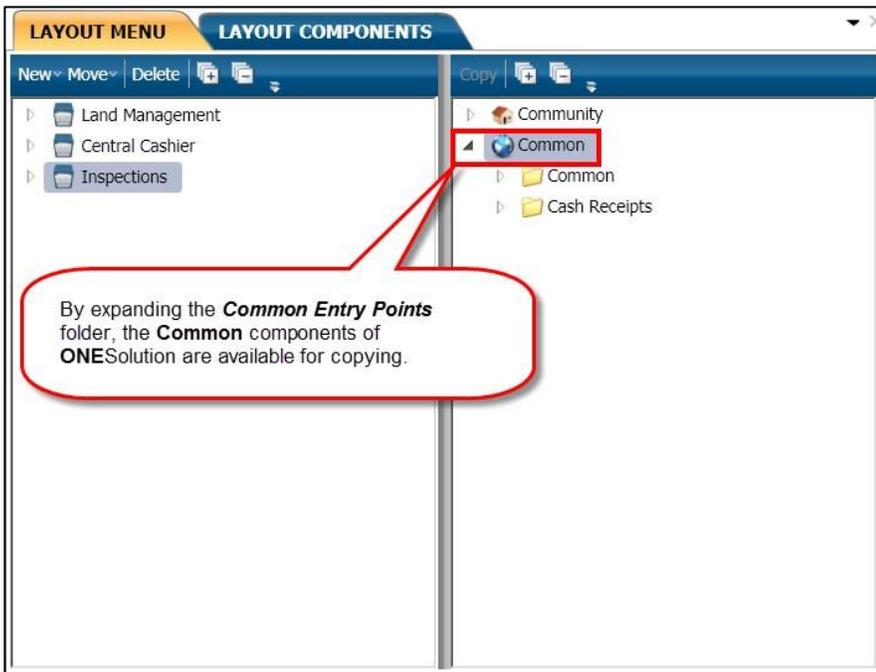
Locate and select the folder that the entry point is to be copied to.
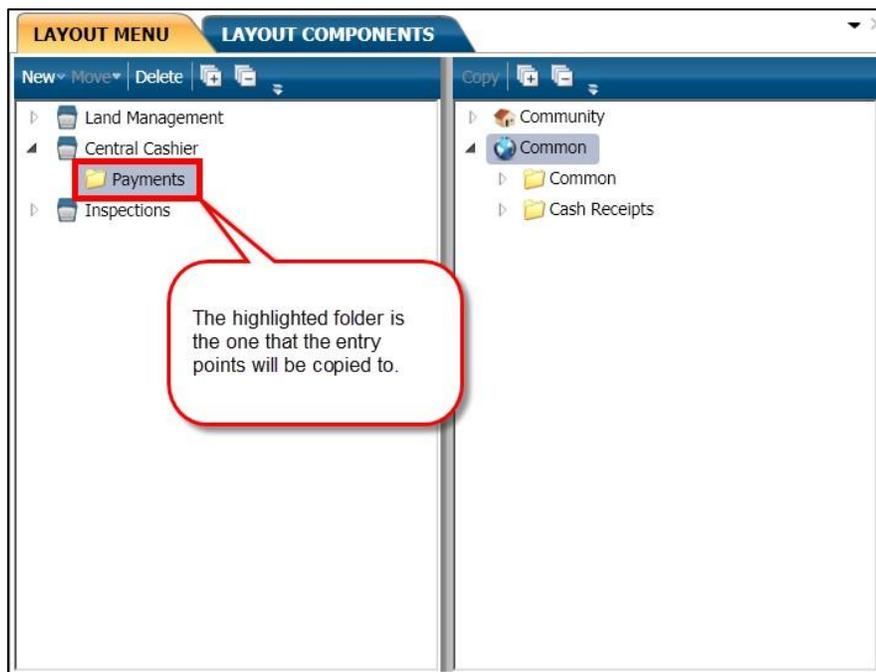
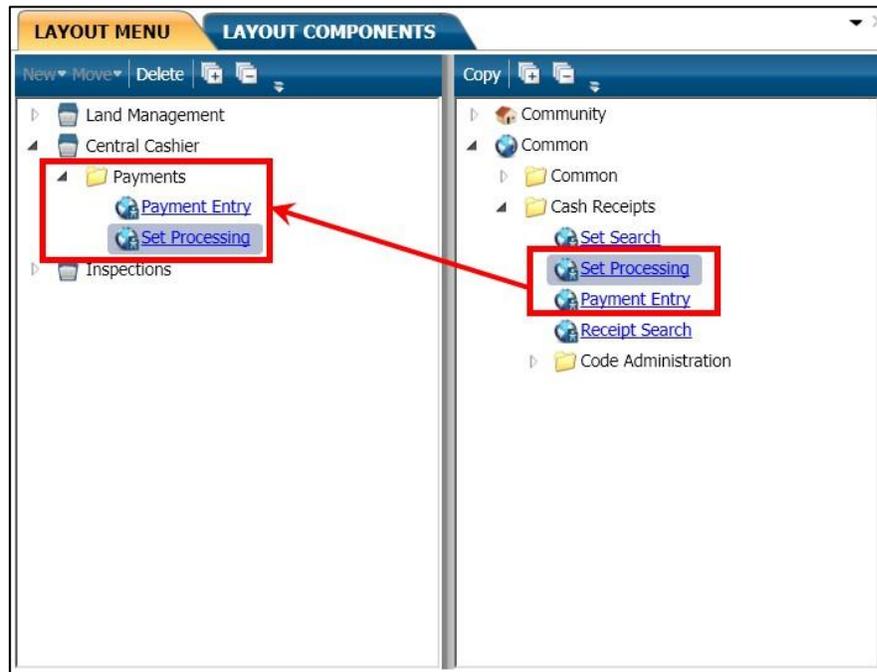7. To copy all entry points of an application, right click on the entry point and select **Copy**
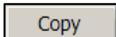
    Copy

. (You can also click with the left mouse button and drag the entry point to the folder.)
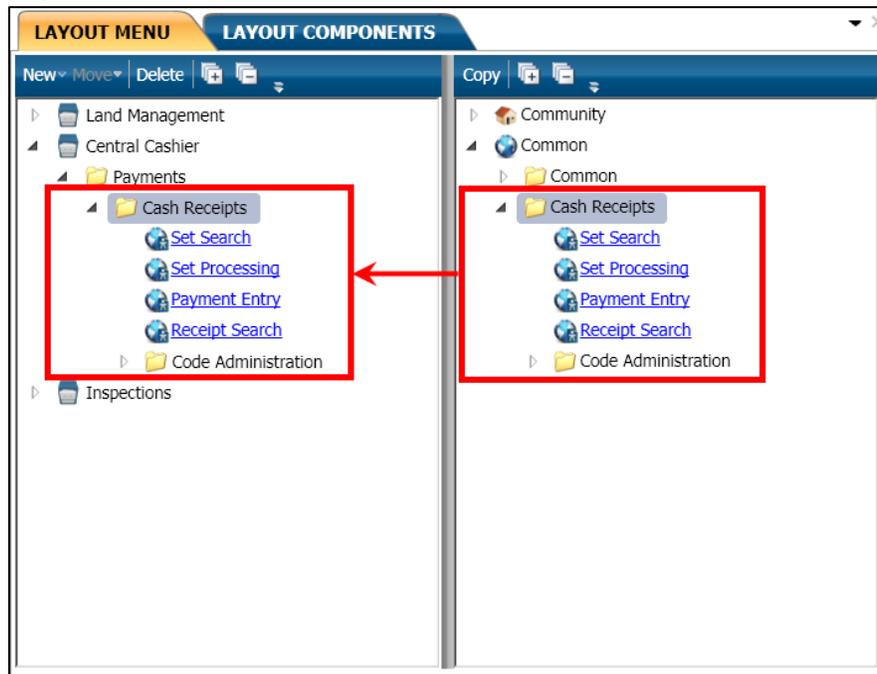
8. To copy an individual entry point, expand the entry point folder. *(For this example Cash Receipts was expanded.)*

9. Locate and select the folder that the entry point is to be copied to.

10. To copy an individual entry point, right click on the entry point and select **Copy**

    Copy
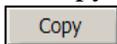
(You can also click with the left mouse button and drag the entry point to the folder.)

11.   Click **Save** .

12.   Click **Close** to return to the desktop.

13.   Click the tab where the entry points were copied to.

Part 2.06 - Adding Components to the Layout

You use the **Components** tab to define the configuration and values for the components. Application-specific components are available under the respective application folder. There are two types of components:

- **Default components** – Components that shipped with the software such as Open Windows, Pending Tasks, and Recent Items.

The table below describes the default components and their functionality:

| Component	Functionality
ONESearch	Displays the relevance fields for the data that displays for the search operation. To set the relevance for each field, enter a numeric value between 1 to 90 in the **Value** fields against each **Configuration Name** field. Relevance is indicated by a star against each search result. Each star highlight is assigned 18 points. The maximum number of stars that can display the relevance are five as the maximum value that can be entered is 90. A tool tip also displays an error message in the **Value** field.
Feed Reader	Displays the RSS feed for the URL set in the **RSS Feed URL.** To set a source URL for the RSS feed, enter a valid URL in the **RSS Feed URL** field. The URL can contain up to 4000 characters. To obtain the latest items from the RSS Feed URL, enter a time interval within the range 5-1440 minutes in the **Refresh Rate** field. This refreshes the URL at the specified time interval and displays the latest items in the feed reader window. To choose how long a feed item must be selected before it is automatically marked as read, enter a time within the range 1-60 seconds in the **Mark Read Duration** field.
Open Windows	Displays a list of application windows that are in "Open" status in your current session.
Recent Items	Displays the list of recently accessed entry points. You can use the "Maximum Items" configuration setting to define a customized number of recent items to display.

Pending Tasks	Displays a list of the pending tasks and their statuses.
Open Jobs	Displays the list of running jobs and their statuses. You can use the "Show Completed Interval (hrs)" configuration setting to define a customized amount of time to show for open jobs.
ONESearch	Displays the relevance fields for the data that displays for the search operation. To set the relevance for each field, enter a numeric value between 1 to 90 in the **Value** fields against each **Configuration Name** field. Relevance is indicated by a star against each search result. Each star highlight is assigned 18 points. The maximum number of stars that can display the relevance are five as the maximum value that can be entered is 90. A tool tip also displays an error message in the **Value** field.
Weather	Displays the weather details for the place configured by your agency.
Web Browser	Displays the specified URL as the **default** home page for the Web Browser **component**.

- **Named components** – Components that are user-defined and have different configuration settings. These user-configurable components display under the **My Components** folder and are visible only for that user. However, you can select the required component and click **Make Public** to make it available for all the Desktop users.

  For example, you can set up the configuration for "**Google Search**" or "**Reports Login**" for a "**Web Browser**" component.

To add the layout components to the desktop, complete the following:

1. Click the *Desktop* icon to open the **Manage Desktop** window.

2. The **Manage Desktop** window displays.

3. Highlight the layout you will be adding components to.

4. Click on the **Layout Components** tab .

5. Select or unselect the components you want for the desktop.
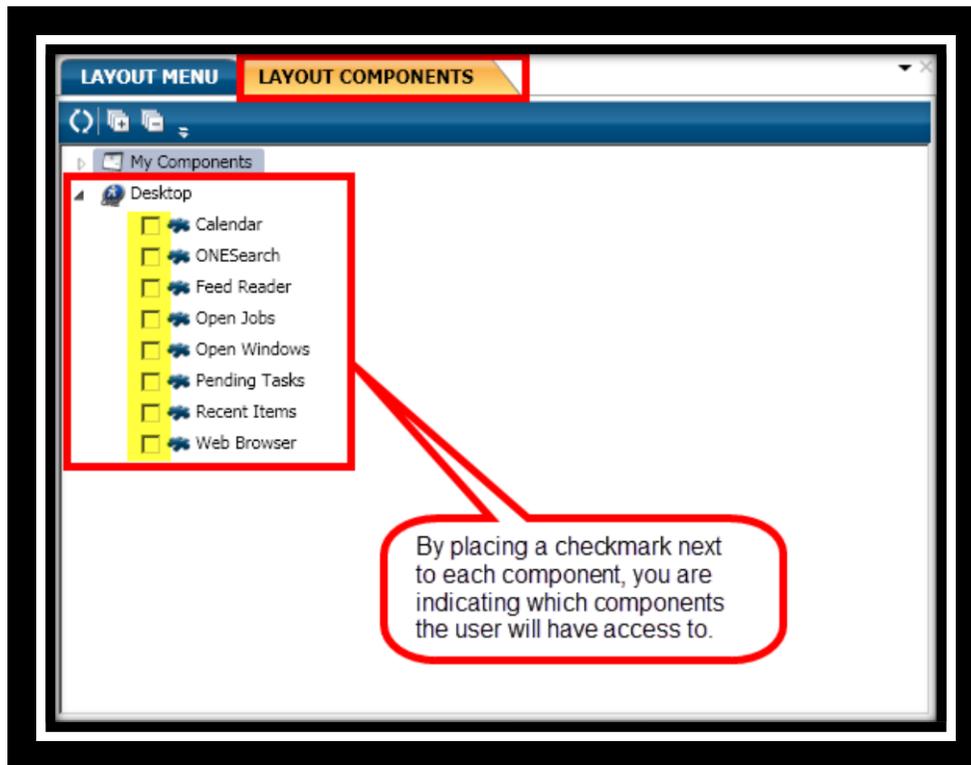
6. Click **Save** .

7. Click **Close** to return to the desktop.

8. The components now are displayed.

Before Adding Components
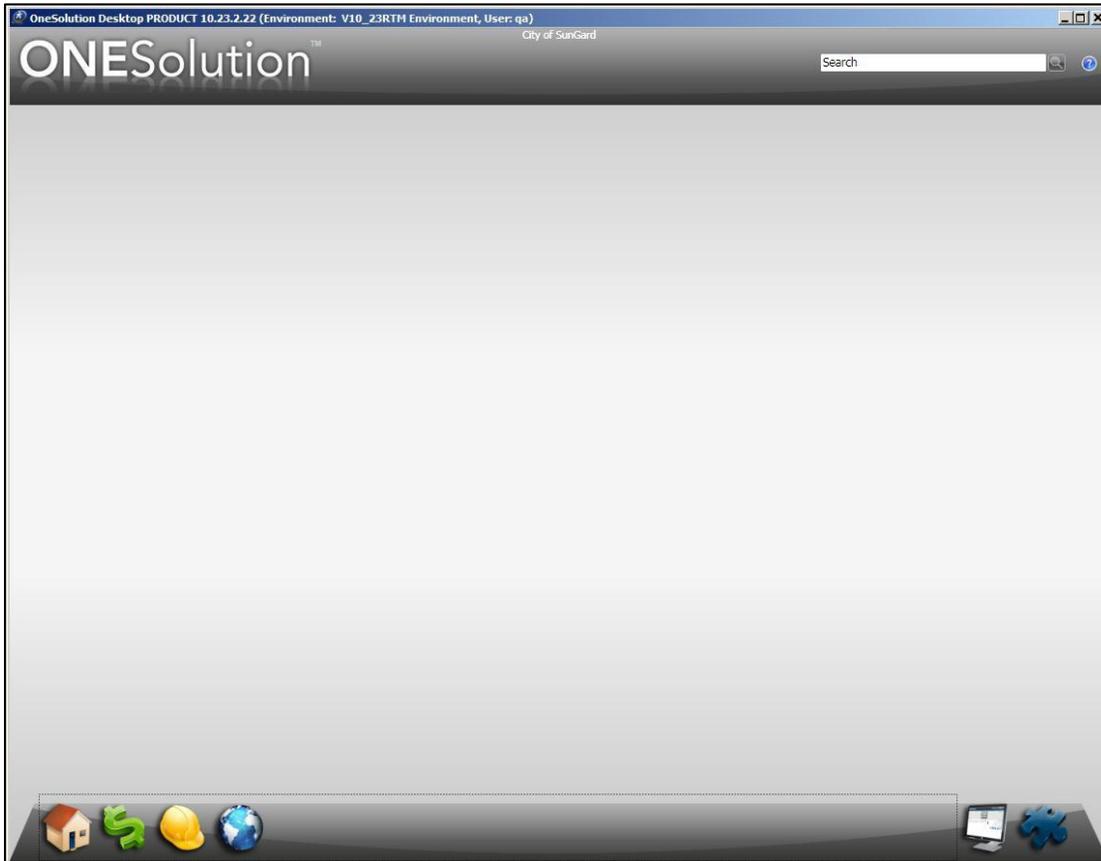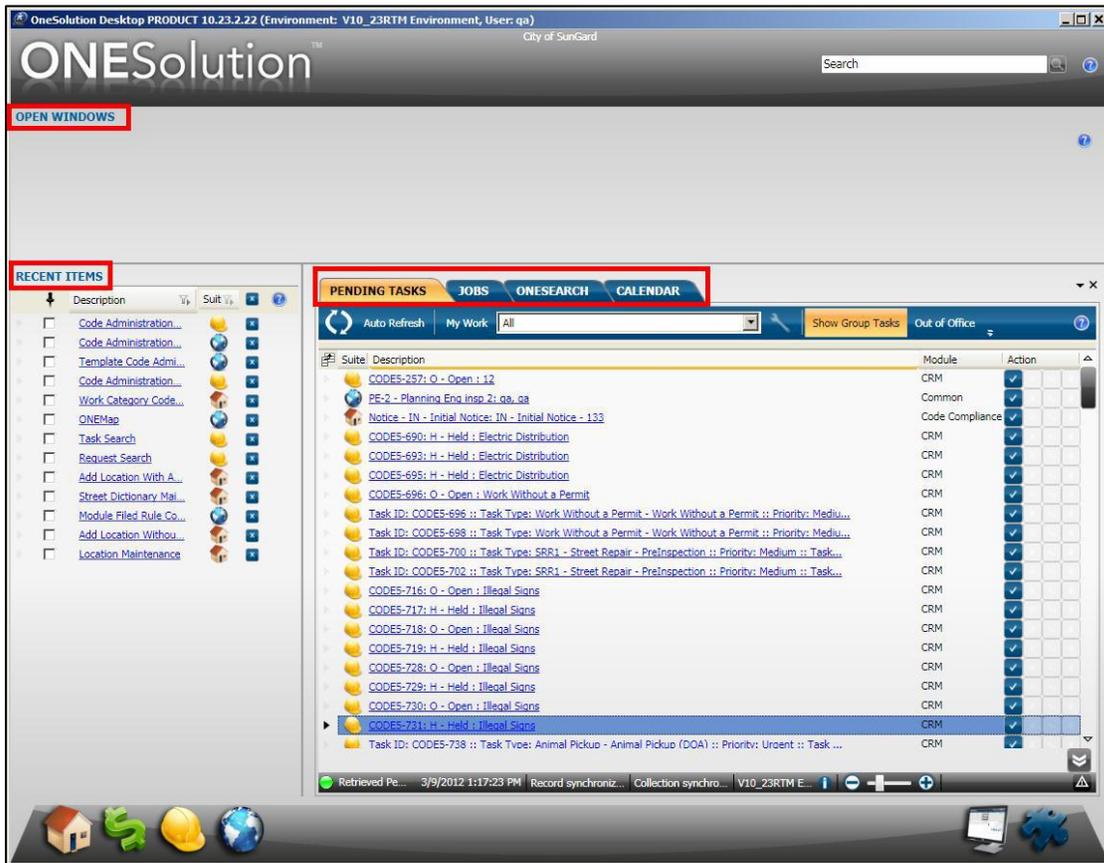
Part 2.07 - Defining Web Pages to Web Browser

You can define multiple web page links and assign them to layouts. To create a link for the **Web Browser**, complete the following:

1. Click the *Desktop* icon to open the **Manage Desktop** window.

2. The **Manage Desktop** window displays.

3. Highlight the layout you will be adding components to.

4. Click the **Components** tab .

5. Select **Web Browser**.

6. Right click select **New** .
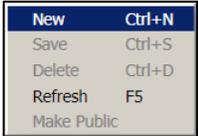
7. The new web browser link component is displayed below **My Components**.
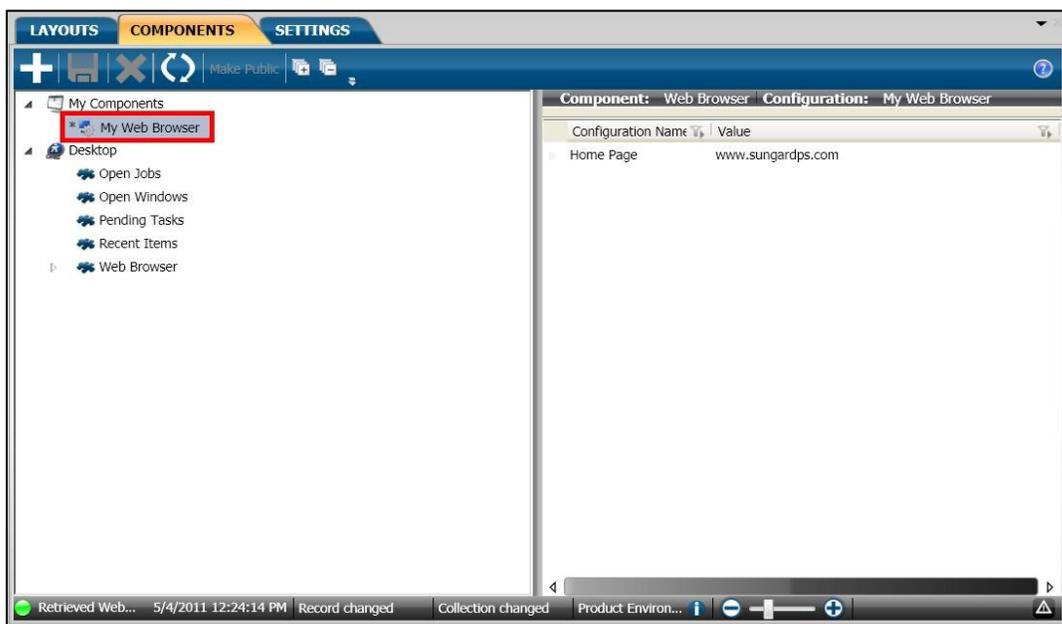
8. Double-click **My Web Browser** and indicate the name of the link. *(For this example the link is named **Google Maps**.)*

9. In the **Value** field, indicate an URL for the Web Browser component. *(This is located in the right panel.)*

10. Click **Save** [save icon].
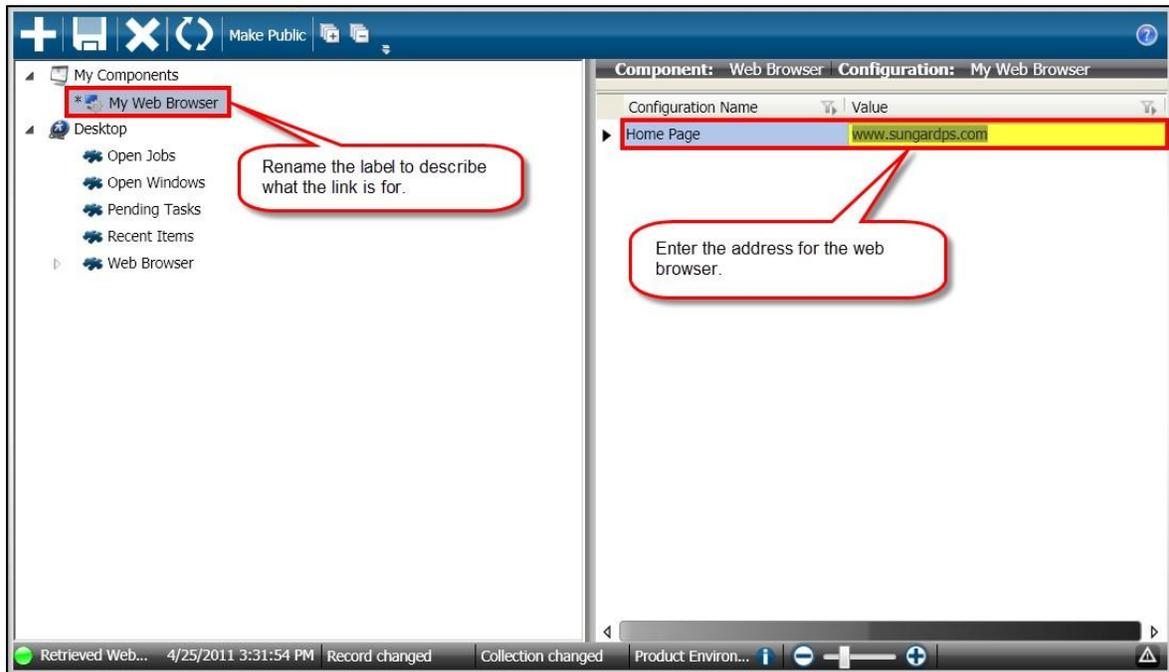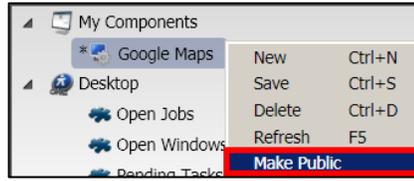
11.   Right click and select **Make Public** [image]. *(This places the link under the component **Web Browser**. You can then select which layout this web site should be available for.)*

When you make a web site **Public** it is placed under the component **Web Browser**.
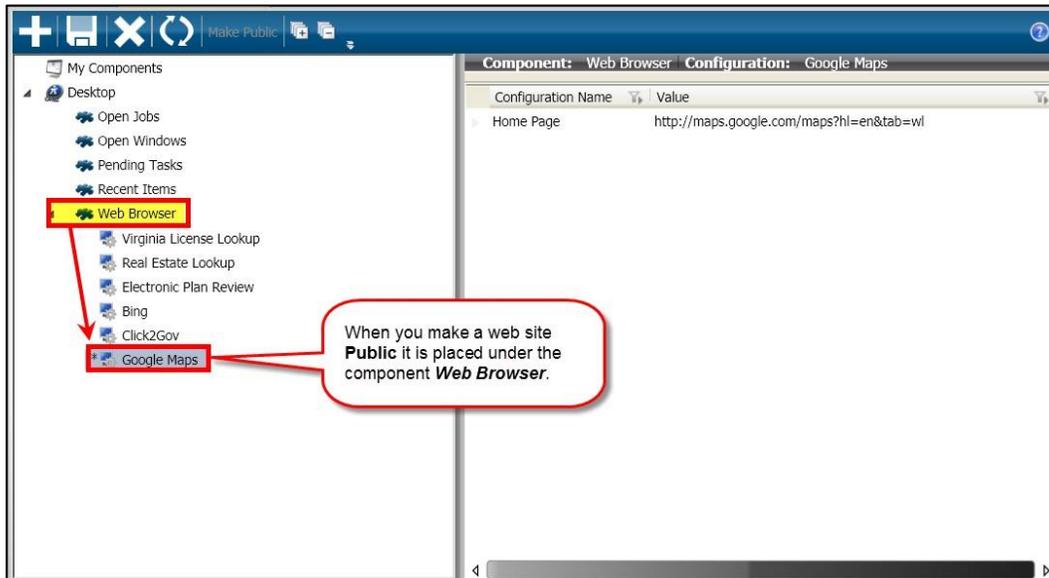
12.   Click **Save** [image].

Part 2.08 - Defining Global Settings for the Desktop

You can use the **Settings** tab to define the global configurations for the Desktop. You can view the default values for these system settings in the **Settings** tab. However, you can change these default values only if you have "**Execute**" and "**Update**" permissions set for your user role.

To define the URL for the **Web Browser**, complete the following:

1.   Click the *Desktop* icon to open the **Manage Desktop** window.

2.   The **Manage Desktop** window displays.

3.   Click the **Settings** tab .

4.   In the **Agency Name** field, indicate your organization's name. *(This appears at the top of the desktop.)*

5.   In the **Desktop help webserver root path:** field, indicate the location of the ONESolution help documentation.

6.   In the **Open Jobs Component Auto Refresh Rate** field, a default has been defined but can be adjusted to your needs. *(This defines how often the system will refresh your Open Jobs component on the desktop.)*

7.   In the **Pending Tasks Component Auto Refresh Rate** field, a default has been defined but can be adjusted to your needs. *(This defines how often the system will refresh your Pending Tasks component on the desktop.)*

8.   In the **Auto shutdown delay** field, a default has been defined but can be adjusted to your needs. *(This defines how long it will take to log off after the user has closed the application.)*

9. In the **User shutdown delay** field, a default has been defined but can be adjusted to your needs. *(This defines how long it will take to log off after the user from the desktop after they have closed the application.)*

10. Click **Save** 💾 .
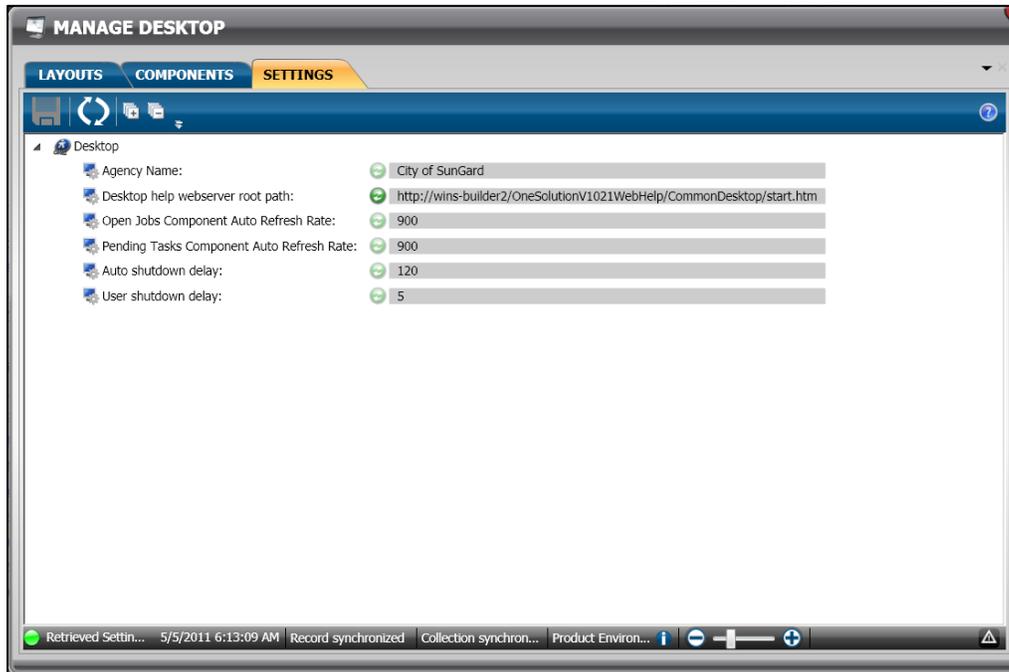
Part 2.09 - Moving a Tab

To move a tab, complete the following:

1. Click the *Desktop* icon to open the **Manage Desktop** window.

2. The **Manage Desktop** window displays.

3. Go to the **Layout Menu** tab.

4. Right click on the tab to be moved.

5. Click **Move**.

6. Select one of the following:

    -   **To Top** – this is enabled if the tab selected is not the first one
    -   **Up** – this is enabled if the tab selected is not the first one
    -   **Down** – this is enabled if the tab selected is not the last one
    -   **To Bottom** – this is enabled if the tab selected is not the last one

7. Click **Save** .

8. The tabs are now rearranged.

Before Move

After Move

Section 3.   Working with Desktop Components

Once you have configured and defined your layouts and have assigned them to the users, they can now rearrange the desktop to their liking.

- Objectives:

At the completion of this lesson you should be able to rearrange a Desktop layout

- Target Audience:

Information Services Supervisor

Information Services Administrator

- Prerequisites:

Working knowledge of Windows

Part 3.01 - Autohide Components on the Desktop

To **Autohide** *(this is also known as pinning)* components on the desktop, complete the following:

1. Click the **Autohide** icon 📌 next to the component you want to hide and pin. *(For this example the **Recent Items** is used.)*
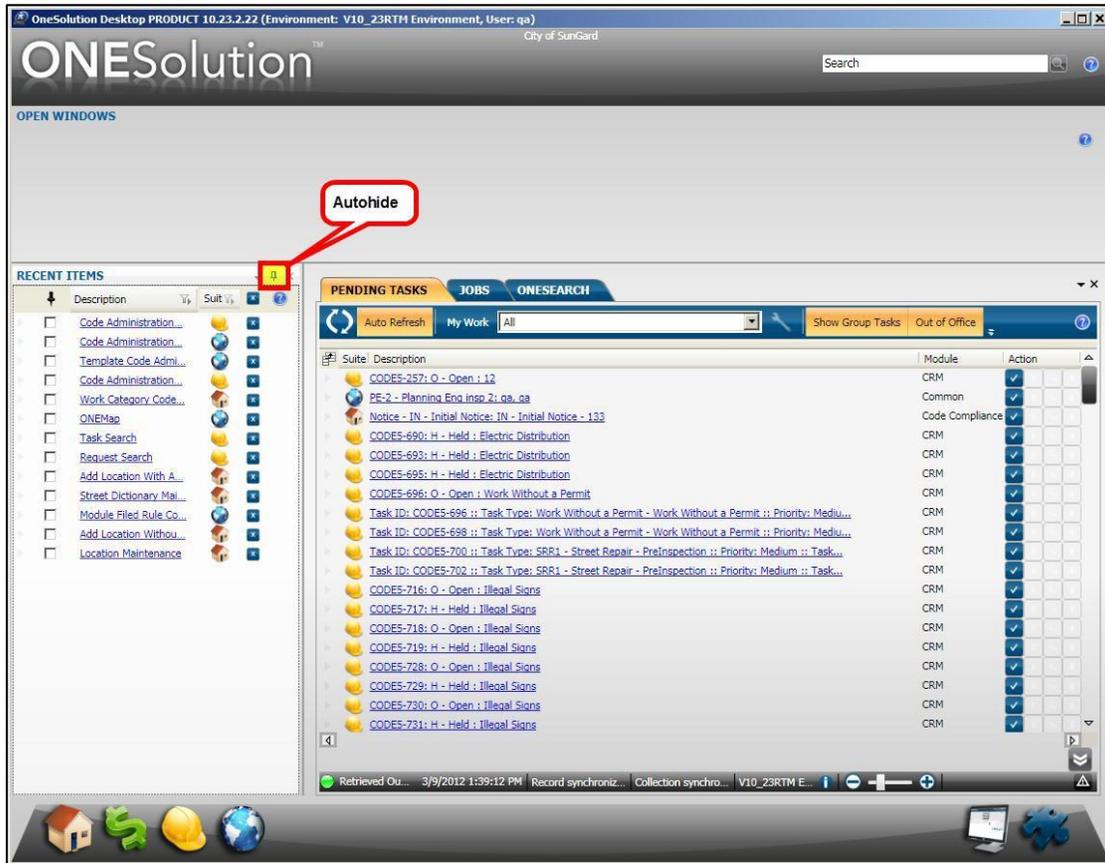
2. The component now is hidden on the desktop. When a component is hidden you are unable to float or dock the component.

3. To open any component that has been hidden, click on the tab RECENT ITEMS to display that component again.
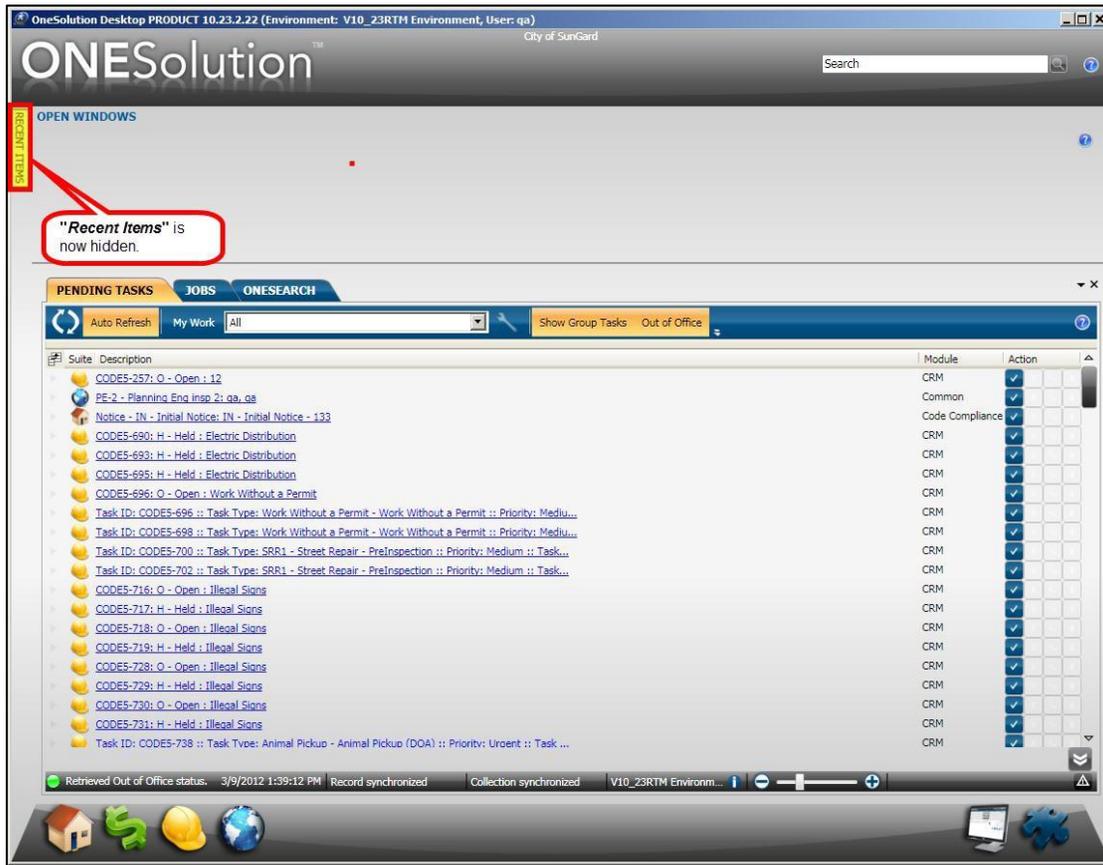
4.   Locate the **Autohide** icon next to the component to un-**Autohide** the component. It will now re-display on the desktop.
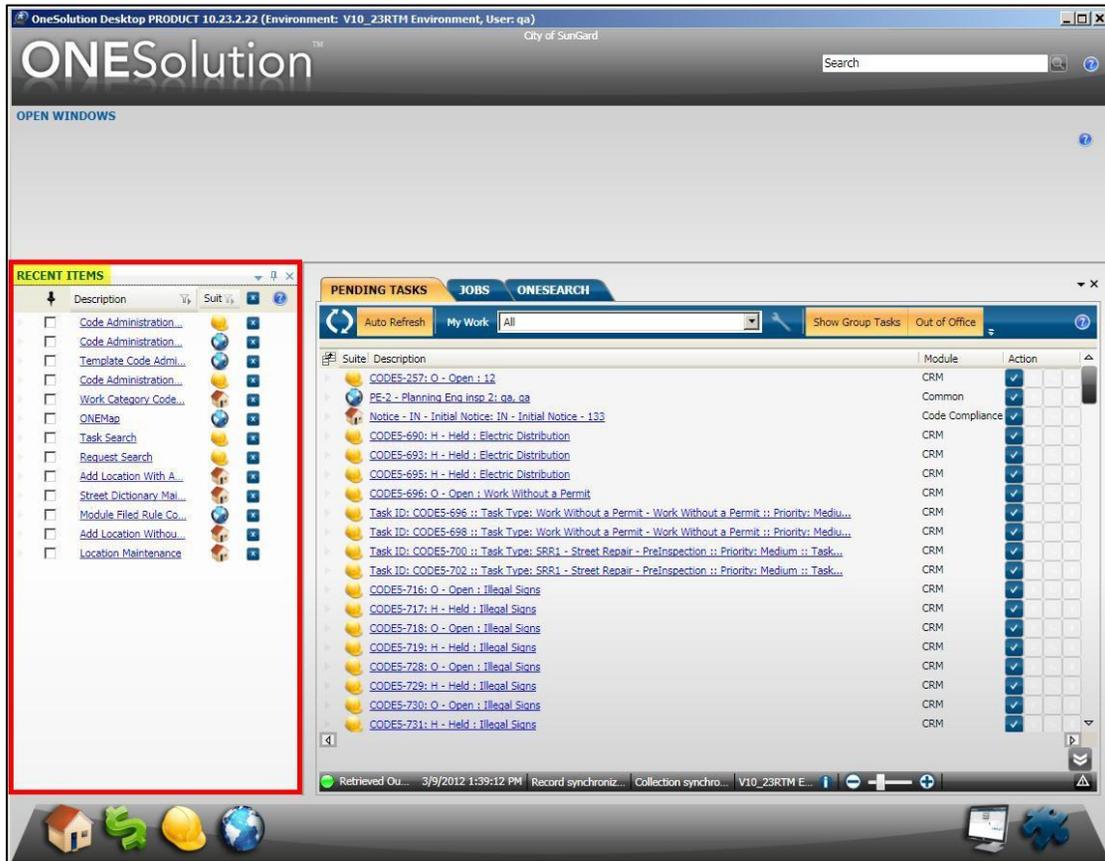
5.   Repeat the above steps to Autohide other components.

Part 3.02 - Working with Tabs

You can turn the desktop components into tabs if you do not wish to be displayed on the desktop as a component. You can also change the display order of the tabs, as well as placing them in a horizontal or vertical position on the desktop.

3.02.1 Adding a Tab

To change a component into a tab, complete the following:

1. Select the component to be set as a tab.

2. Locate the component to be worked with, right click and select **Tabbed Document**
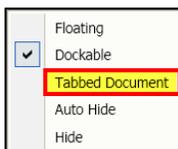
. *(For this example the **Recent Items** is used.)*
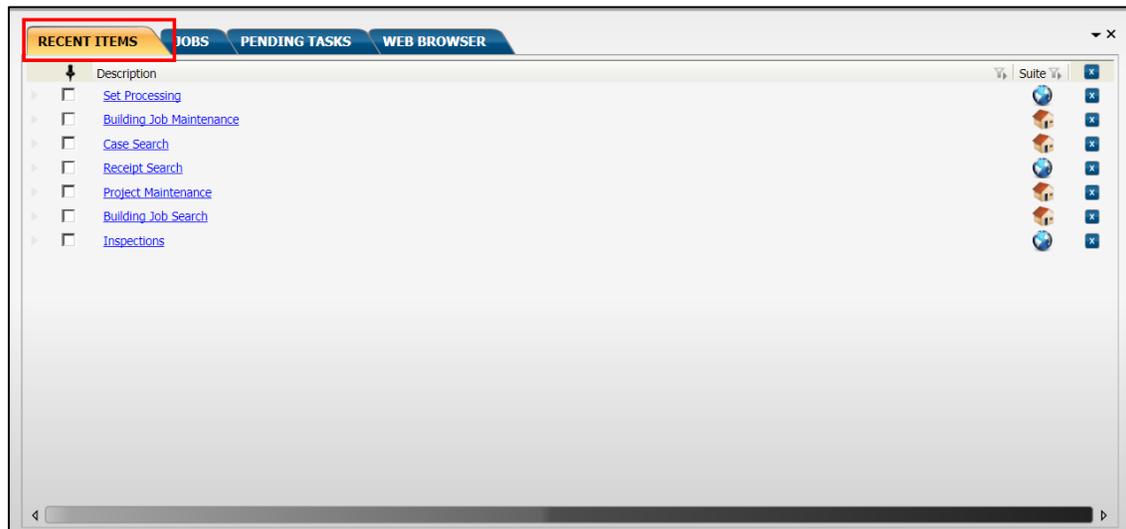
3. To un-tab a component, right click and select **Dockable**. *(For this example the **Recent Items** is used.)*

4. The component is now docked and no longer displayed as a tab.
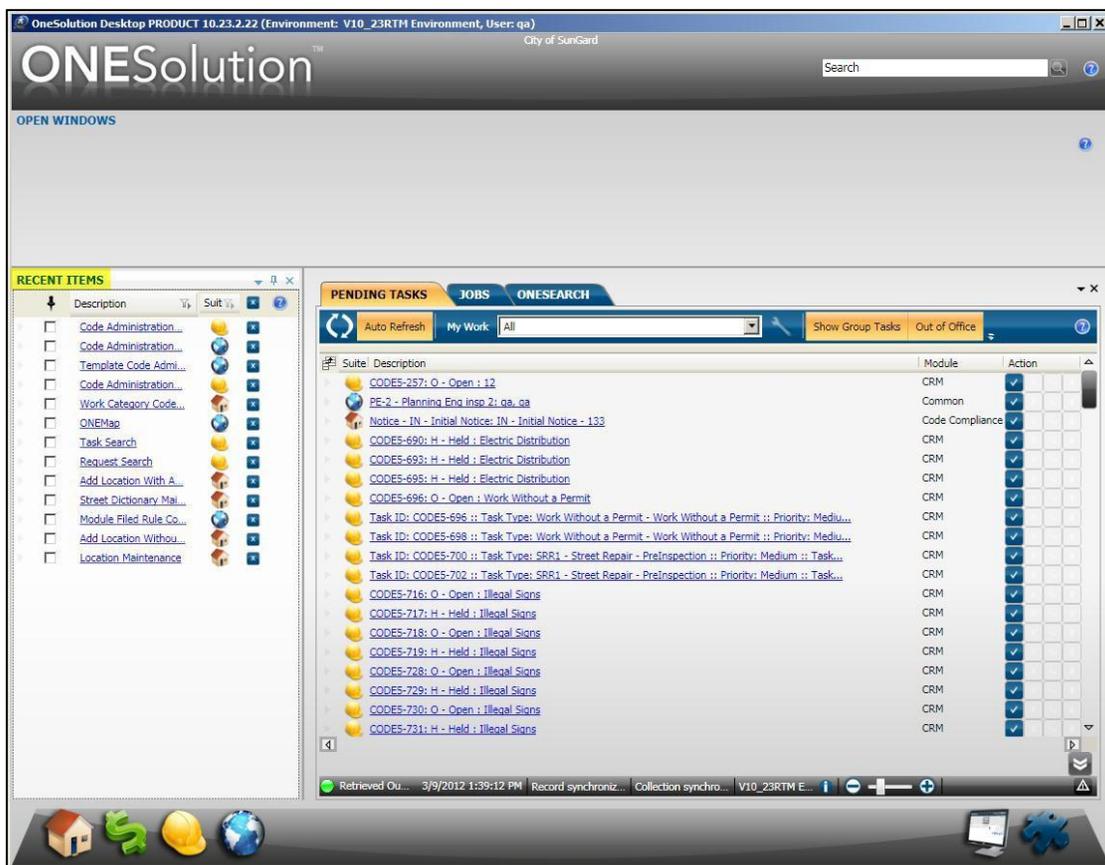
3.02.1 Changing the Tab Order

Each user can change the order in which the tabs display. To change the order that the tabs display, complete the following:

1.   To move a tab, click on the tab. *(For this example the **Jobs** tab is used.)*

2.   While continuing to click on the tab, drag the mouse either to the left or the right.

Before Moving
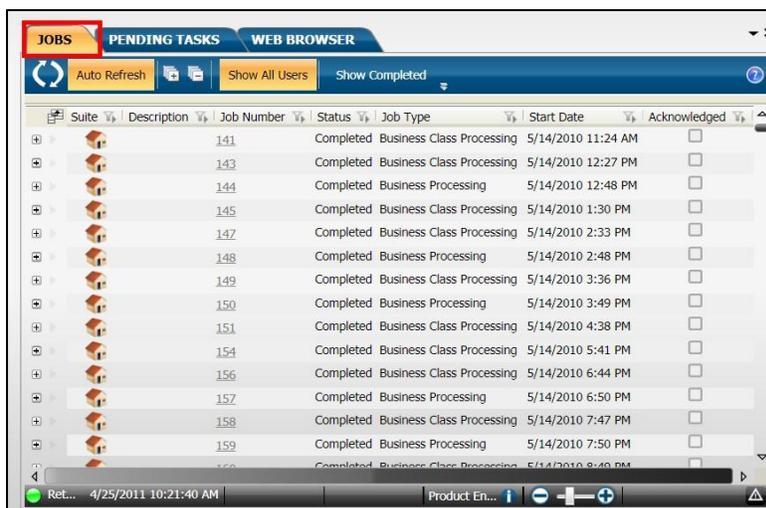
After Moving
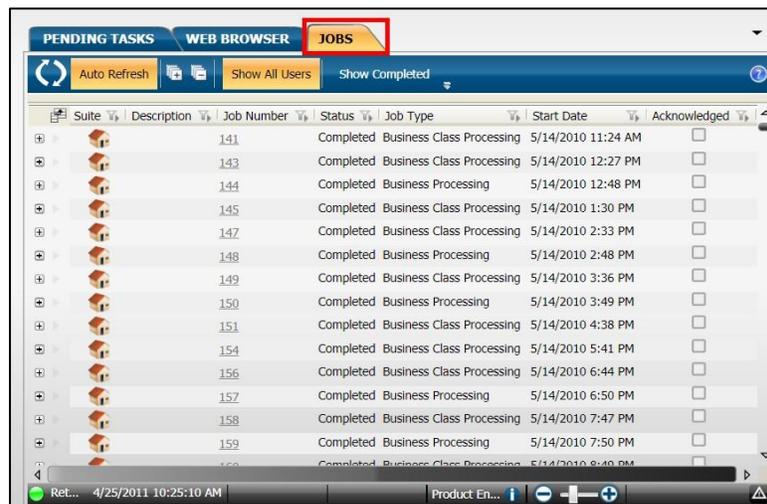
3. Continue rearranging the tabs until the desktop displays the way you want it.

3.02.3 Creating a Horizontal Tab Group

You may want to display your tabs in a horizontal fashion. To do this you will need to select a tab and change the display to horizontal.

To change a tabbed document to display horizontally, complete the following:

1. Right click on the tab label that will be the start of a new group.

2. Select **New Horizontal Tab Group**.
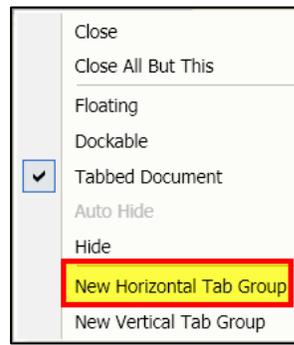
Before New Horizontal Group
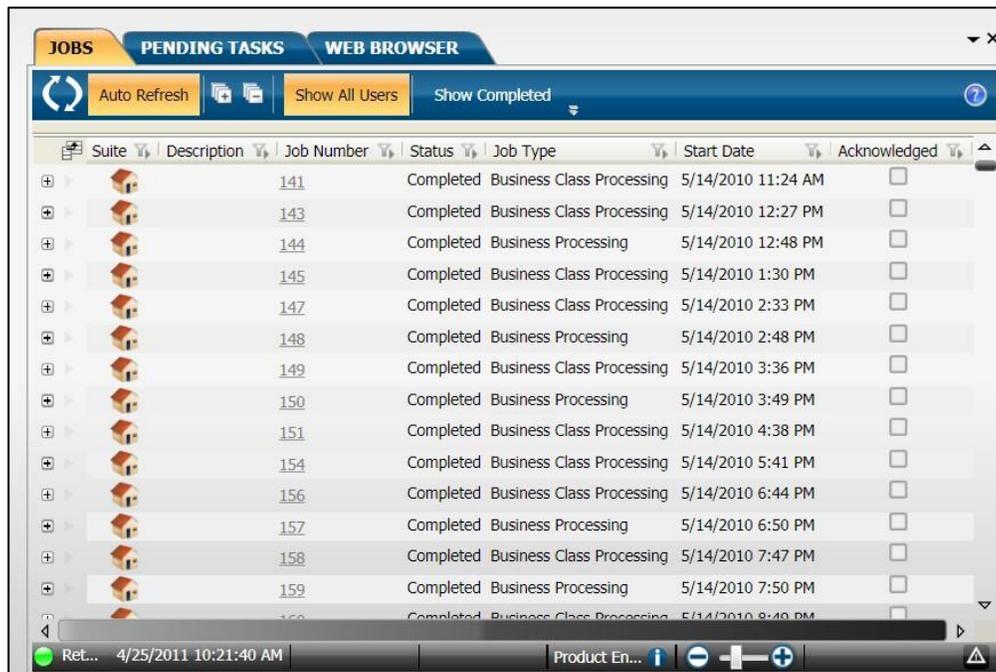
After New Horizontal Group
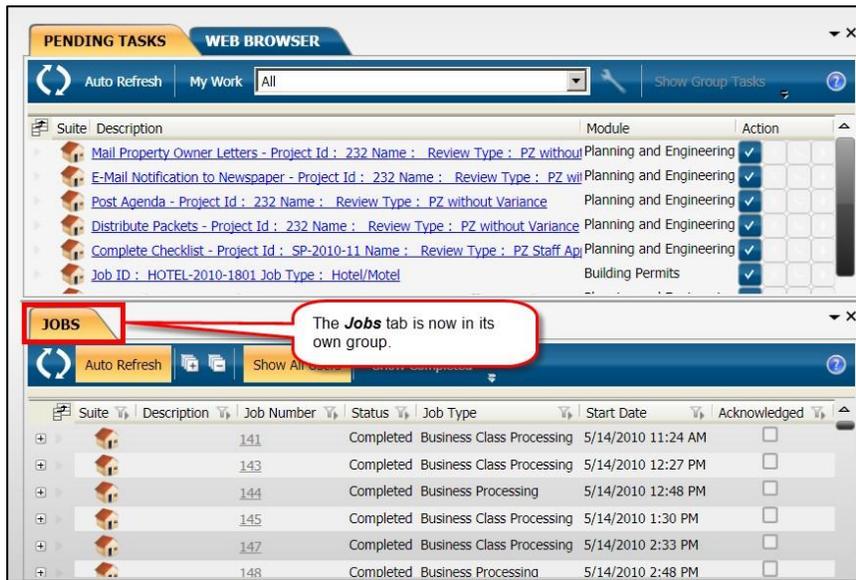
3.   To ungroup the component, right click on the tab label.

4.   Select **Move To Previous Tab Group**.
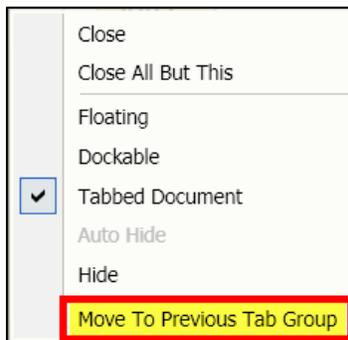
3.02.4 Creating a Vertical Tab Group

You may want to display your tabs in a vertical fashion.   To do this you will need to select a tab and change the display to vertical.

To create a new vertical tab group, complete the following:

1.   Right click on the tab label that will be the start of the new group.

2.   Select **New Vertical Tab Group**.
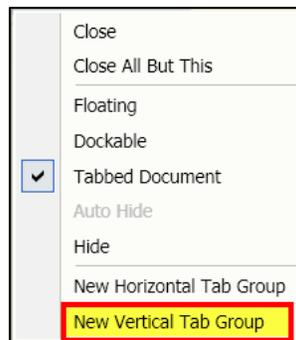
Before New Vertical Group
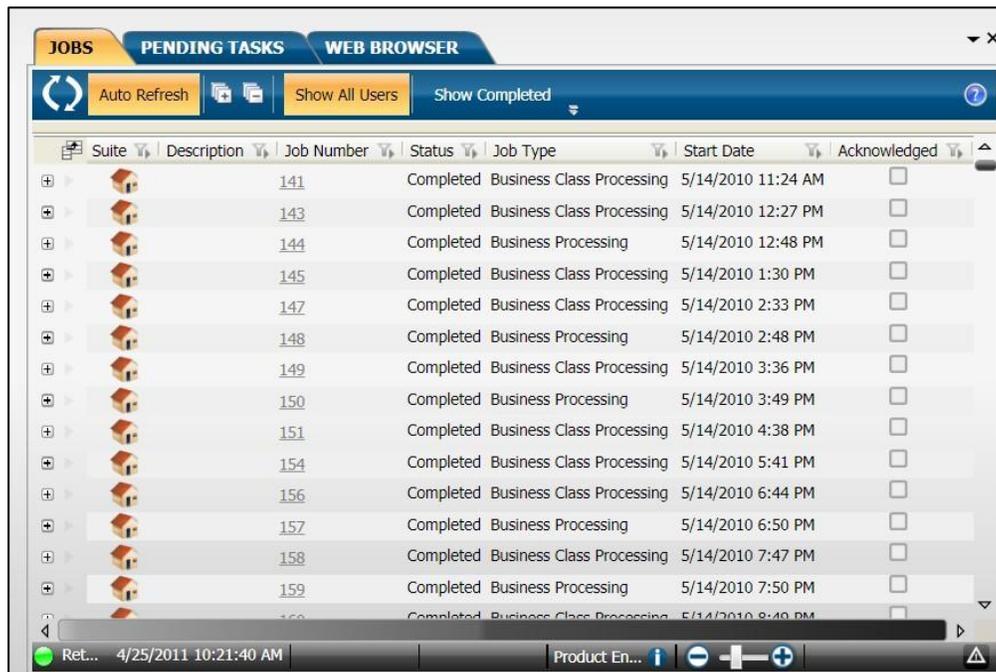
After New Vertical Group
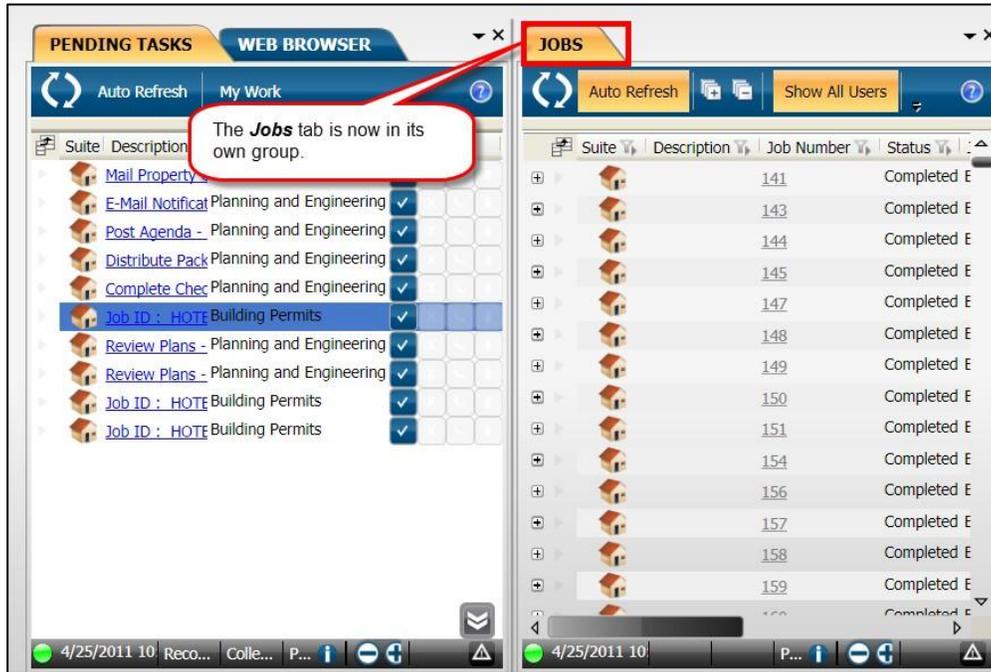
3.   To ungroup the component, right click on the tab label.

4.   Select **Move To Previous Tab Group**.
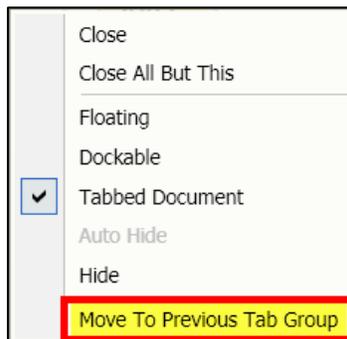
3.02.5 Adding an Existing Tab to an existing Group

To add a tab to an existing horizontal or vertical tab group, complete the following:

1. Right click on the tab label that will be moved to another group.

2. Select **Move To Next Tab Group**.
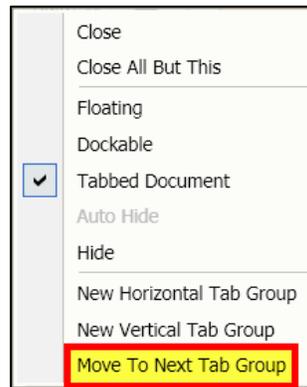
Before Move
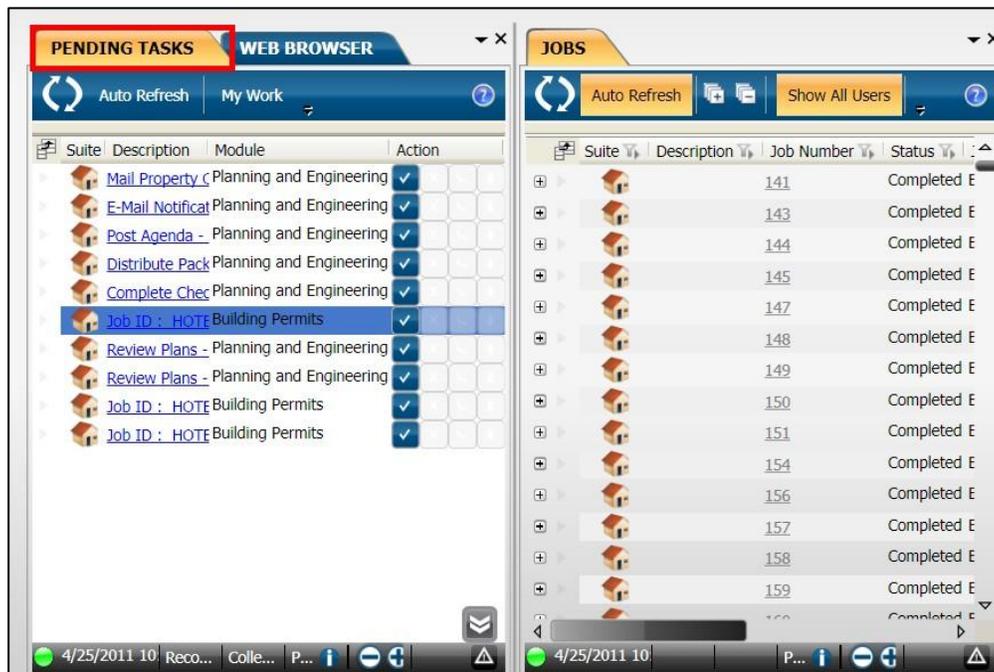
After Move
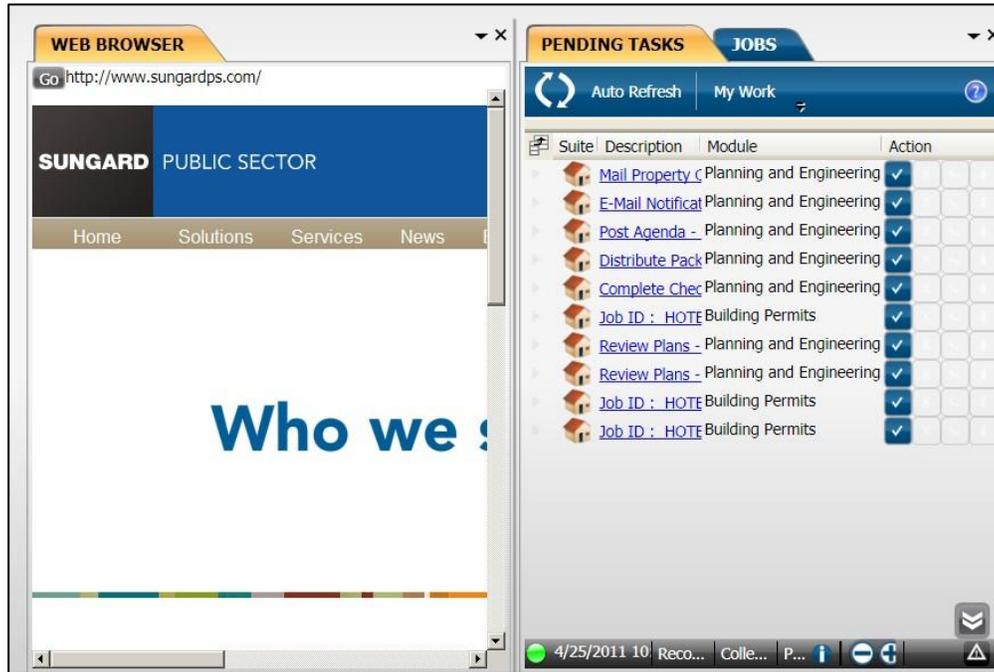
3.   To move the component back, right click on the component.

4.   Select **Move To Previous Tab Group**.
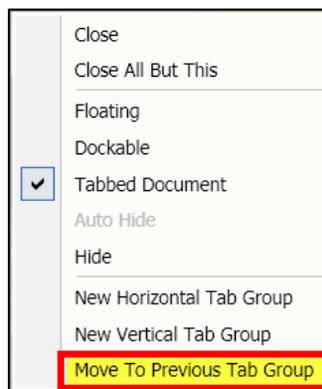
Part 3.03 - Using the Window Position Options

You can use the **Window Position** options to re-arrange the components on the Desktop window customize your layout design.

Click the down arrow in the component you want to move to display the **Window Options** drop-down list. A checkmark indicates the currently selected option.
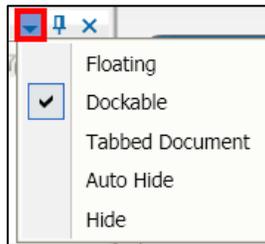
The available options are:

- **Floating** - Click to detach the component from the desktop and have it appear in a separate floating window.

- **Dockable** - Click to activate the "dockable" feature. Dockable means the component can be moved and set into a static position using the placement arrows. The component can then be moved again as needed.
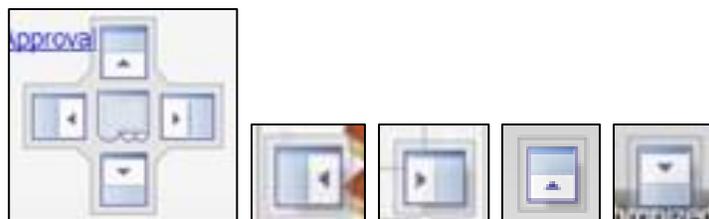
Desktop
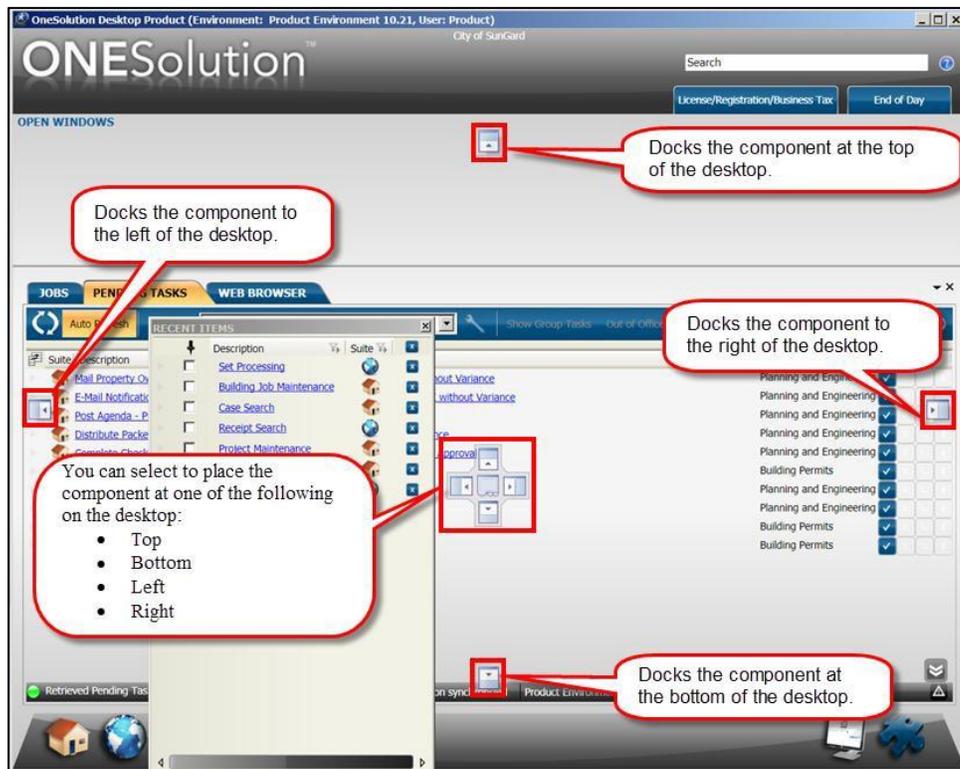
- **Tabbed Document** - Click to arrange the component as tabs on the Desktop window.

- **Autohide** - Click to stack the component as a tab on the left side of the window. You also can click [🔲] to toggle the **autohide** and display options.   This also is also referred to as pinning and unpinning.

- **Hide** - Click to hide the component.

- **Close** - You also can click [×] to close the component.

Part 3.04 - Clicking & Dragging Components

You can move components around the desktop. To move a component on the desktop, complete the following:

1.   Select the component to be moved.

2.   Click in the component header area with the left mouse button.
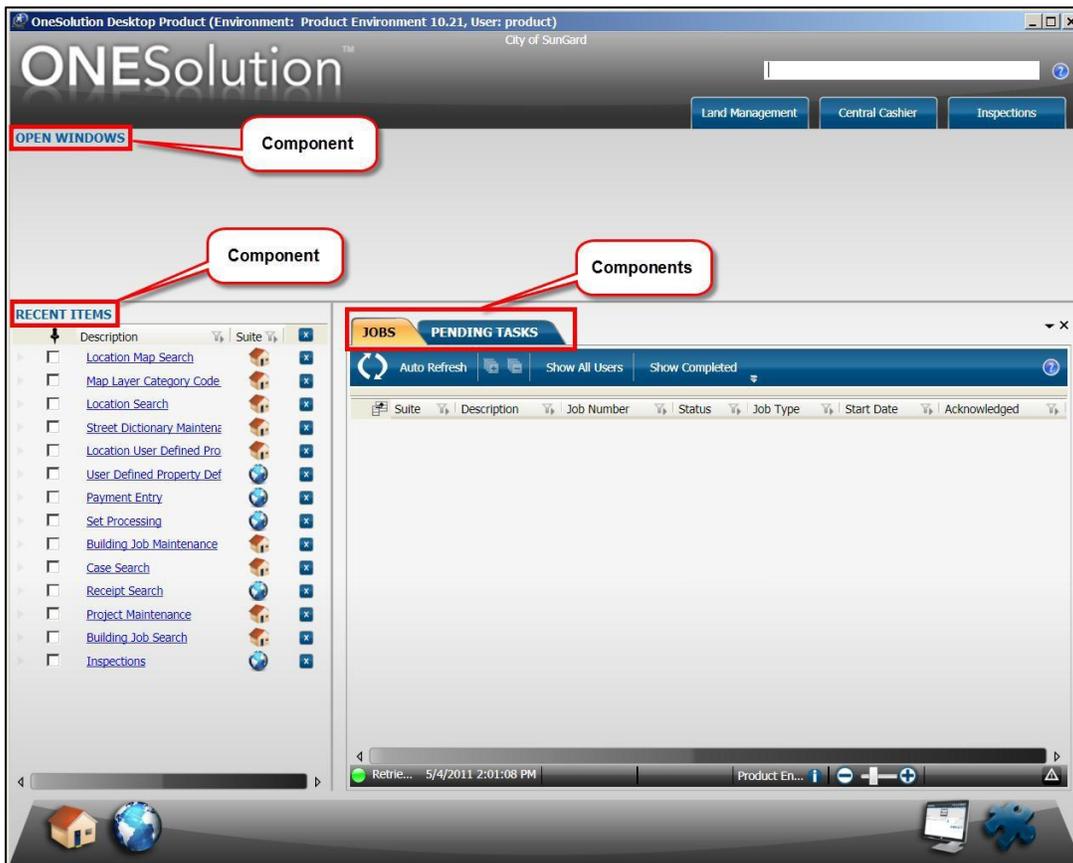
3.   Begin dragging the component and do not release the mouse button.

4.   The relocation arrows will display.

5.   Continue dragging with the left mouse button depressed and hover over one of the arrows.

6.   Release the mouse and the component is now relocated based on the arrow selected.

7.   The *Recent Items* component is used.

                Left Arrow

Right Arrow

Up Arrow

 Down Arrow

Part 3.05 - Changing the Desktop Layouts

If you have been given permission through the SPSOne security, it is possible to change which desktop Layout you view.

To change the desktop layout, complete the following:

1. Click the **Layout and Component Picker** icon [icon] on the lower right bottom panel.

2. The **Layouts** and **Components** panel displays.

3. The available layouts will be listed under the **Layouts** tab. Your individual layouts will be under the **My Layouts** option. Other layouts that may be available for use will be listed under **Community** or **Common**. Highlight the layout to display and click **Select**. *(For this example **Community Development** was selected.)*

Original Layout

New Layout
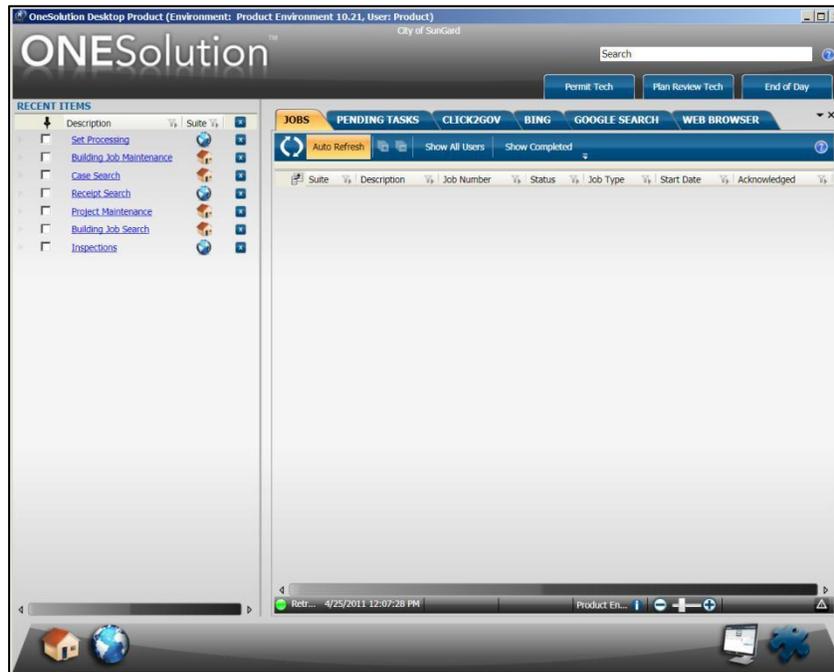
Part 3.06 - Changing the Desktop Components

Based on the permissions granted through the SPSOne security, it is possible to change which components are displayed on the desktop.

To change the desktop component, complete the following:

1. Click the **Layout and Component Picker** icon on the lower right bottom panel.

2. The **Layouts** and **Components** panel displays.
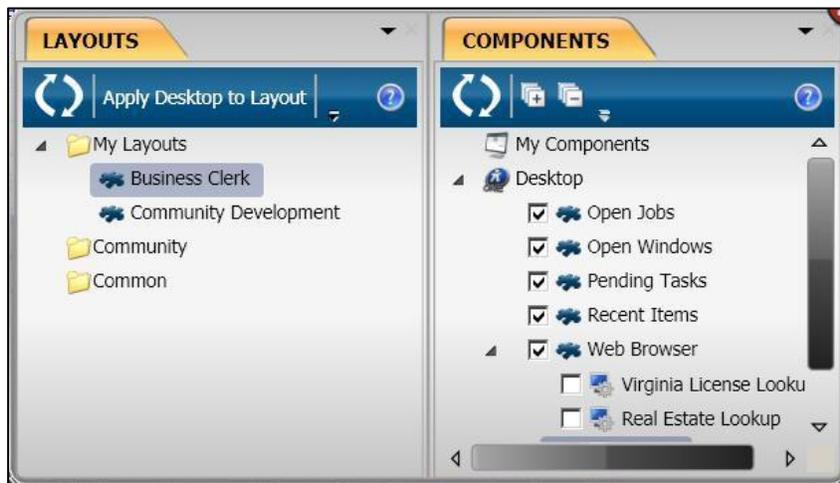
3. The available components will be listed under the **Components** tab on the right hand side of the screen.

4. Click the checkbox to select or unselect a component.

Original Components
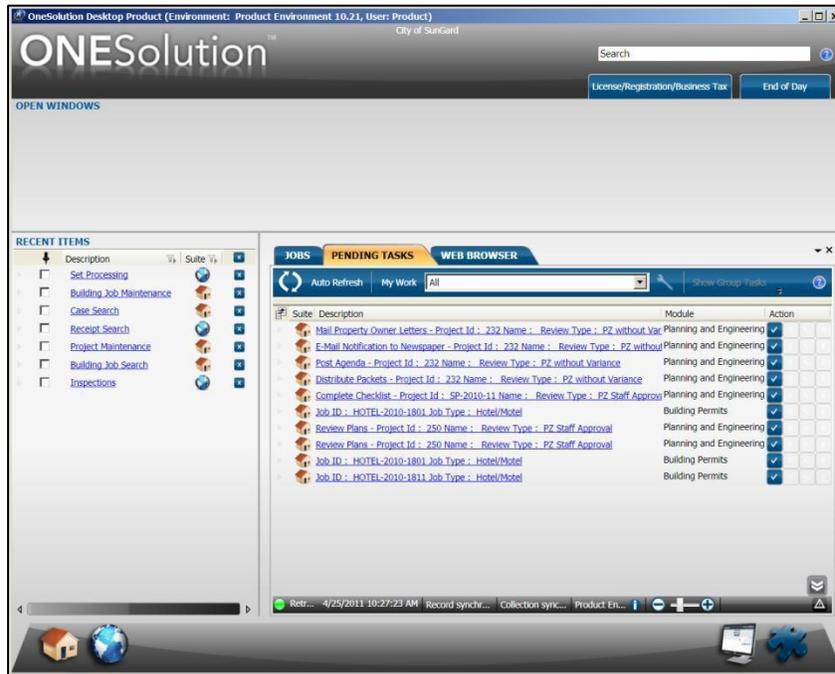
Selected and Unselected Components
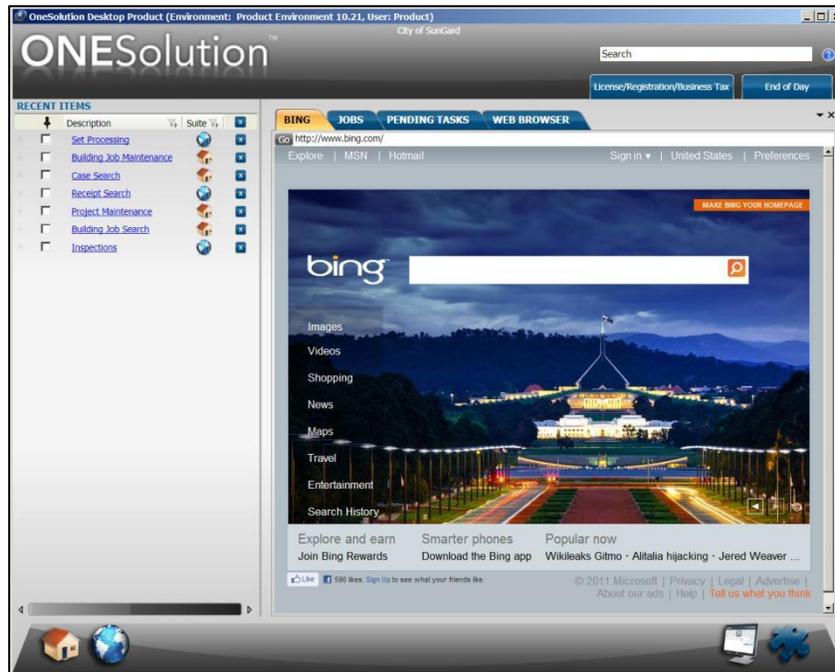
This page is intentionally left blank.

Section 4.   Working with ONESearch

Using the **ONESEARCH** component, you can search for the functional reports, entry points and data within various suites. You can choose one or more suites to search for the entry points and you also can separate the functional entry points from the reports by setting a filter.

This option searches for text as typed by you, filtering the results by suite and displaying results from the manifest and the suite data.

- Objectives:

At the completion of this lesson you should be able to utilize ONESearch

- Target Audience:

Information Services Supervisor

Information Services Administrator

- Prerequisites:

Working knowledge of Windows

Part 4.01 - ONESearch Overview

This option searches for text as typed by you, filtering the results by suite and displaying results from the manifest and the suite data.

You can filter the results by each suite. When you click the toggle buttons for various suites in the **Filter by Suite** section, will filter the search results by suite.

Clicking a particular suite toggle button includes that suite's results in the results. The toggle buttons are enabled only when the suite is connected to the desktop.

This is applicable to both **Entry Points and Reports** and **Results** sections.

The **Search** button is enabled only when you start typing the search text in the search field.

The right section of the **ONESEARCH** component has two options:

- **Result Panes** - In this pane, you can view the search results according to your requirement. You can view either the Entry Points results, or the Data results or the Data Grid for the data results or any combination these. Click **Result Panes** checkbox show or hide any of the panes.

- **Layouts** - This option gives you the provision to view the **ONESEARCH** component in different layouts. You can view the **ONESEARCH** component in default, entry points only, data only, data grid only, data and data grid only layouts. Click **Layouts** to view the options.

The results in "*Entry Points*" section can be filtered according to the entry points and reports, by

clicking the *Include Functional Entry Points* icon and the *Include Report Entry Points*

 icon.

Since it is a dockable pane, you can also drag and drop the Data Grid pane next to the Data pane when the **ONESEARCH** component is in default layout.

You can obtain two types of results in the **ONESEARCH** component:

- **Entry Point And Reports Results** - Displays all the entry points and reports matching the text that is typed in the search field. The results display as you type in the search field.

- **Data results** - Displays all the data matching the text that is typed in the search field.

  You have to click the **Search** button next to the search field to obtain data results.

The data results displays results related to the following:

- **Common PA** - common party, common address, common contractor, common party e-mails, common party phone, common party address.

- **Community** - location/parcel related party, building job related parties, building job contractors, case related parties, case assignments, business, business related party, business professional, project related parties, and project managers.

- **Work Management** - request related party.

Part 4.02 - Searching for Data Using ONESearch

Using the **ONESEARCH** component, you can search for data within various suites. You can choose one or more suites to search for data within those suites. You can search for common responsible related party or a manager associated with jobs, inspections, requests, and tasks.

On the click of **Search** next to the textbox, **ONESEARCH** searches for the text typed by you, filtering the results by suite and displaying results from the suite data in the **Results** section. If you have configured the results to display in a grid format, then a **Results Table** pane also displays.

1.   On the desktop, select the **ONESearch** tab .

2.   The **ONESearch** component displays.
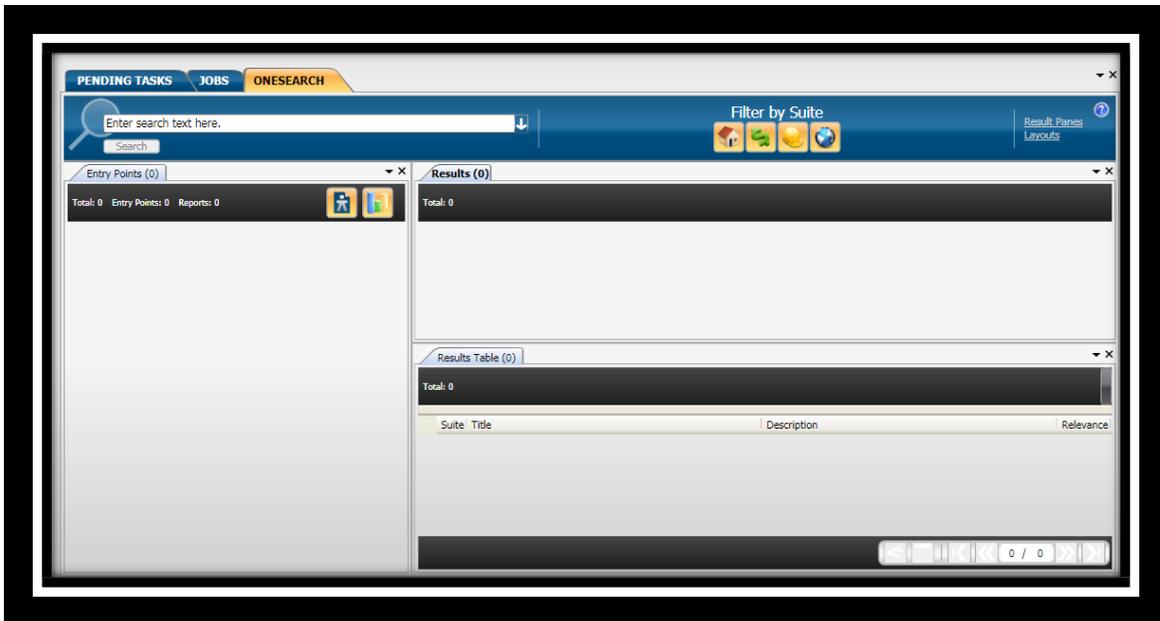
3.   In the **Filter by Suite** field, indicate which suites should be search.
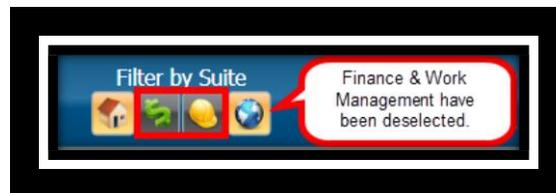
4. Enter the search criteria in the **Search** text box. *(As you enter text, the **Entry Points** panel will begin to display entry points that could possibly match your text.)*

Search Text Box

Entry Point Panel

5. Click **Search** [Search].

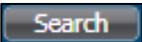6. A preview of the search results displays in both the **Results** and **Results Table** panels.

The results in the **Results** panel are displayed as a hyperlink. The subject is mainly the suite name along with the window name. Below the subject is the name of the related party and the common party details and also displays the icon of the suite it belongs to. You can click on any of the results and navigate to the respective windows.

The results in the **Results Table** panel are displays the same results as that of **Results** panel but in a grid format. The results display the suite, title, description, and the relevance of the data. The stars that display against each result is the relevance of the related party. The relevance is configured based on the importance the agency defines for its related party.

7. Click the hyperlink to access the entry point you were searching for.

Section 5.   Working with Calendars

Using the calendar component, you can view the calendar appointments of the current common party user. The calendar component displays the list of calendars associated with the common party user.

- Objectives:

At the completion of this lesson you should be able to utilize the Calendar component

- Target Audience:

Information Services Supervisor

Information Services Administrator

- Prerequisites:

Working knowledge of Windows

Part 5.01 - Working with the Calendar Component

A calendar has the following views:

- **Day view**- Displays the appointments calendar for the selected date in the left panel.

- **Week view** - Displays the appointments calendar for the selected week in the left panel. In the Week view, you can choose either **Show Work Week** or **Show Full Week**. If you select **Show Work Week**, the calendar displays the days that are selected as the work week - that is Monday through Friday.

- **Month View** - Displays the appointments calendar for the selected month in the left panel.

- **Timeline View** - Displays the appointments calendar horizontally with time slots arranged from left to right. By default, the day starts at 8:00 AM. However, you can use the scroll bar and select an earlier time. In the Timeline view, you can click **Show Day**, **Show Work Week**, or **Show Full Week** and view the time slots for a day, week, or month respectively.
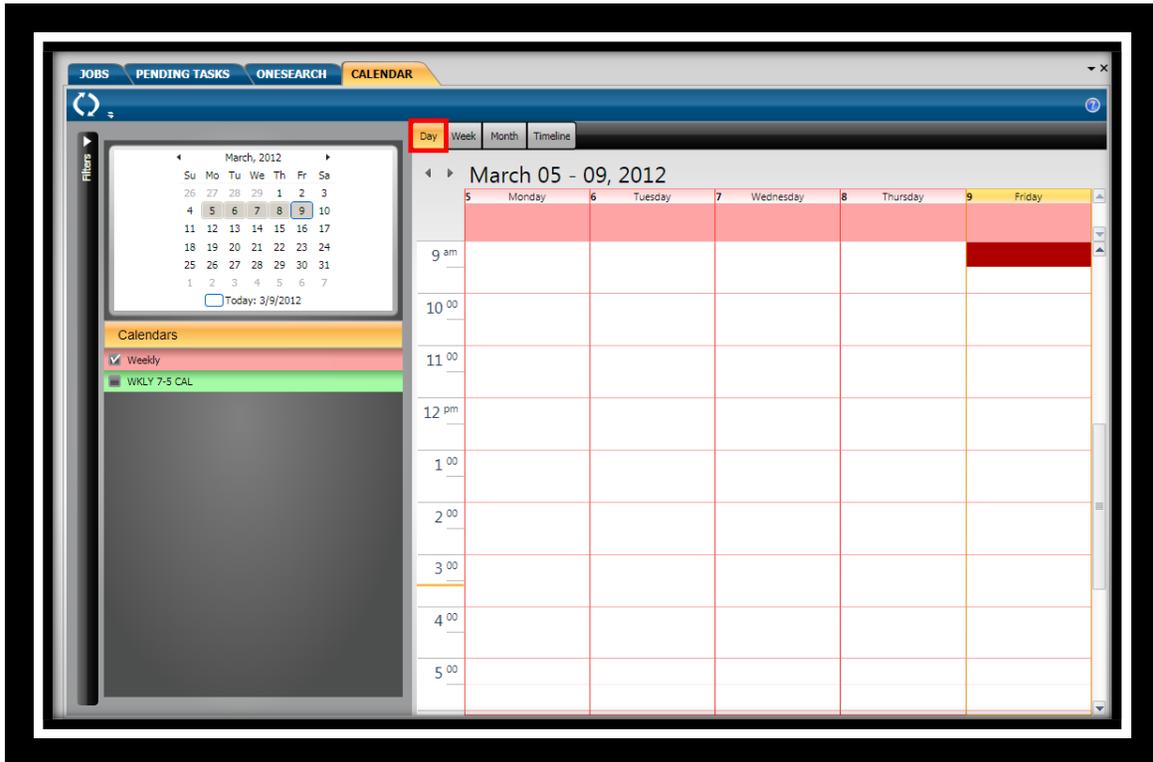
To display current calendar appointments complete the following:

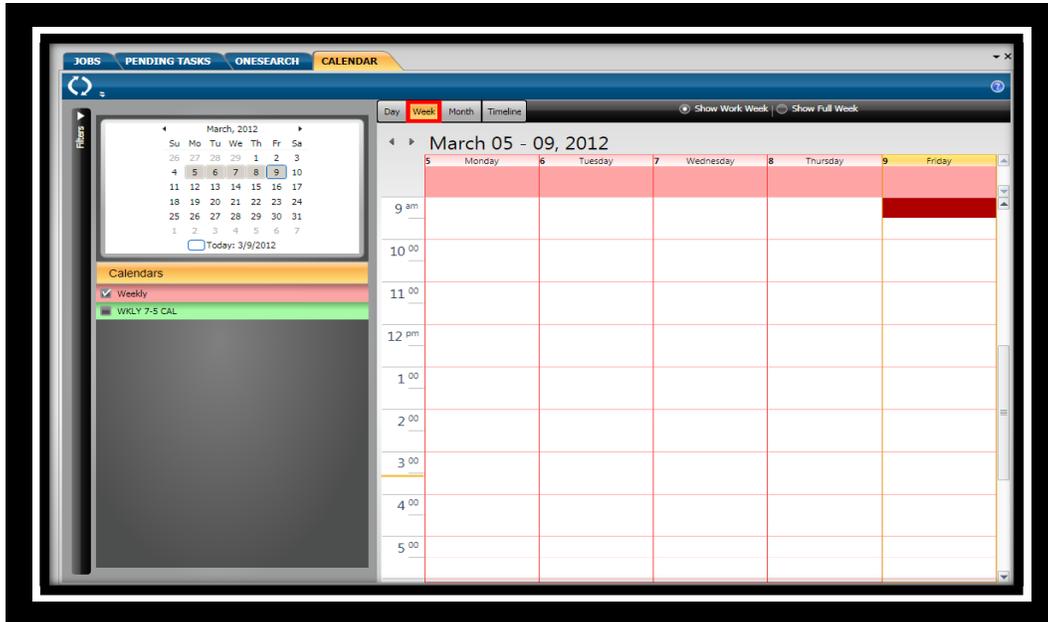1.   On the desktop, select the **Calendar** tab   .

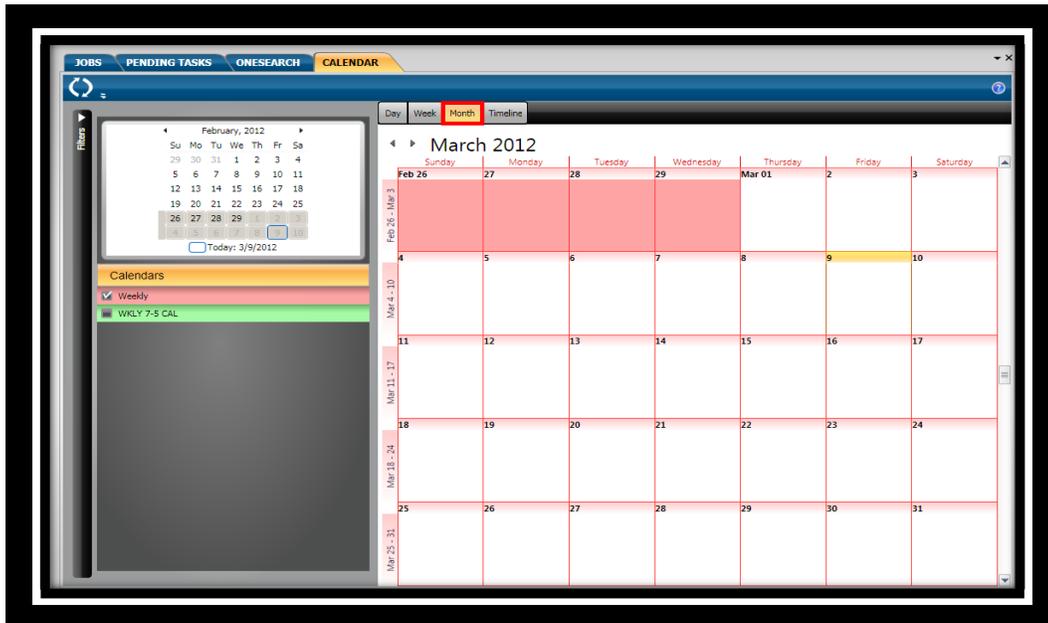2.   The **Calendar** component displays. *(The calendar can display by day, week, month or timeline.)*

Day View

Week View

Month View

Section 6.   Working with RSS Feeds

You can access the RSS feed using the feed reader window. The source URL for the feed is set in the **components** configuration settings for the feed reader.

- Objectives:

At the completion of this lesson you should be able to utilize RSS Feeds

- Target Audience:

Information Services Supervisor

Information Services Administrator

- Prerequisites:

Working knowledge of Windows

Part 6.01 - Viewing the RSS Feeds

You can access the RSS feed using the feed reader window. The source URL for the feed is set in the components configuration settings for the feed reader.

To display the RSS feeds complete the following:

1. On the desktop, select the **Feed Reader** tab .

2. The **Feed Reader** component displays.
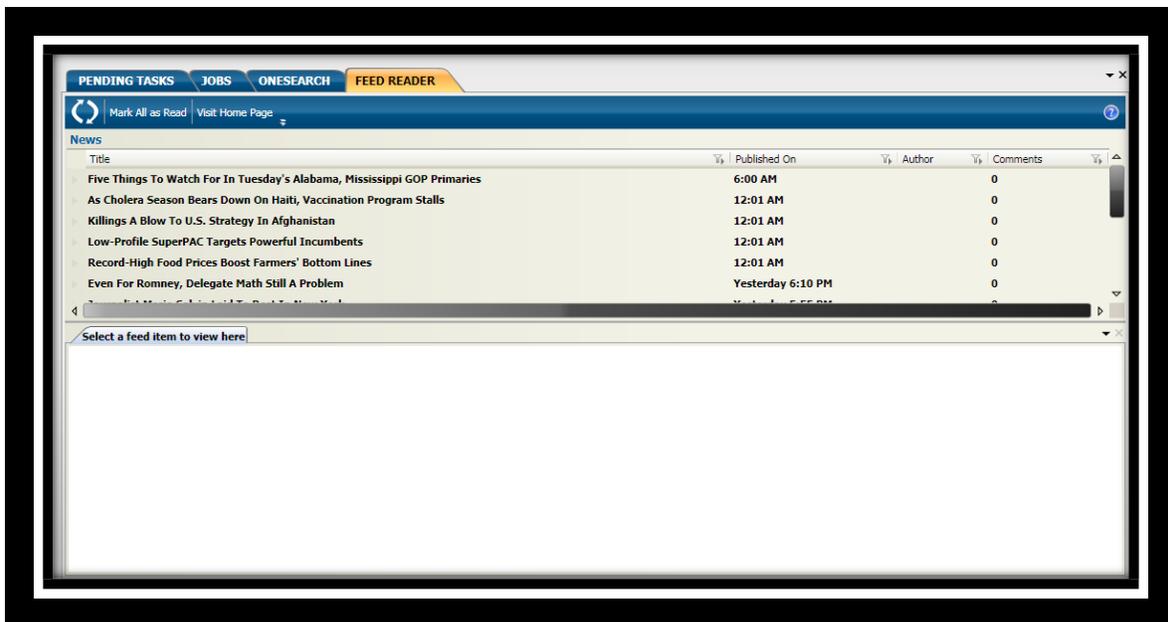
Click to select a news item to be displayed.