ONeSOURCE Client and Web Help

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Introduction

For Installation Help

This document covers topics related to using and searching content available in the ONeSOURCE Client. For help with installing and uninstalling the application for the installed version of the ONeSOURCE Client, refer to the ONeSOURCE Installation Guide for your product.

For help with installing, updating, or uninstalling datasets for the installed version of the ONeSOURCE Client, refer to the Configuration section, Configuration Page, for instructions.

Purpose and Scope

The purpose of this user guide is to describe the different types of content available in the ONeSOURCE Client and to help users search and use this content.

The ONeSOURCE Client comes in one of two versions: a desktop Client or a web-based Client. The desktop Client is installed on the user's machine and uses datasets that have to be installed prior to use. The web-based Client uses a URL that users access and the data is already included; no installation is necessary on the part of the user.

Both versions of the ONeSOURCE Client have their advantages. Once a dataset has been installed to the desktop it is self-sufficient and can be used in the field without an internet connection. Both the application and data are stored on the user's machine. Users of the installed Client need to periodically connect to the internet in order to apply updates to installed datasets. For users with a constant internet connection, the web-based Client is practically maintenance-free. Both the application and data are stored externally on a server and updated automatically to keep them up to date.

A key difference between the installed and web versions of the ONeSOURCE Client is that the web version includes a User Management section for Administrators, as well as management of announcements and feedbacks. The installed version of the Client does not include these.

The goal of both versions is to put all of the resources customers need to do their jobs in a single application that is easy to use and up to date.

Customer Configuration

This document covers all features that are part of the base configuation of the ONeSOURCE Client. Base features are available to ***all*** users. In addition to the base features, there are additional ones that can be configured for specific Client versions. As a result, there will be features described in this Help that some individual end users may not see in the version they are using. To add one of these additional features to their Client version, it needs to be configured, or activated, before the feature will display and can be used. All end users belonging to a specific organization will have access to the additional features that have been configured for it.

The terms ***customer configuration*** refer to the set of base and additional features that make up an organization's version of the ONeSOURCE Client. Throughout this document, the reader will notice references to the user's customer configuration when discussing features that must be activated by their organization in order for them to see them.

Accounts (Web Client only)

Registration

When registering a new account, users must create usernames and passwords on the Registration screen. If either does not conform to system requirements, an error message will be displayed with details of what a valid username or password must contain.

Usernames
If a user enters a character in the username field that is not valid, the following error message will display:

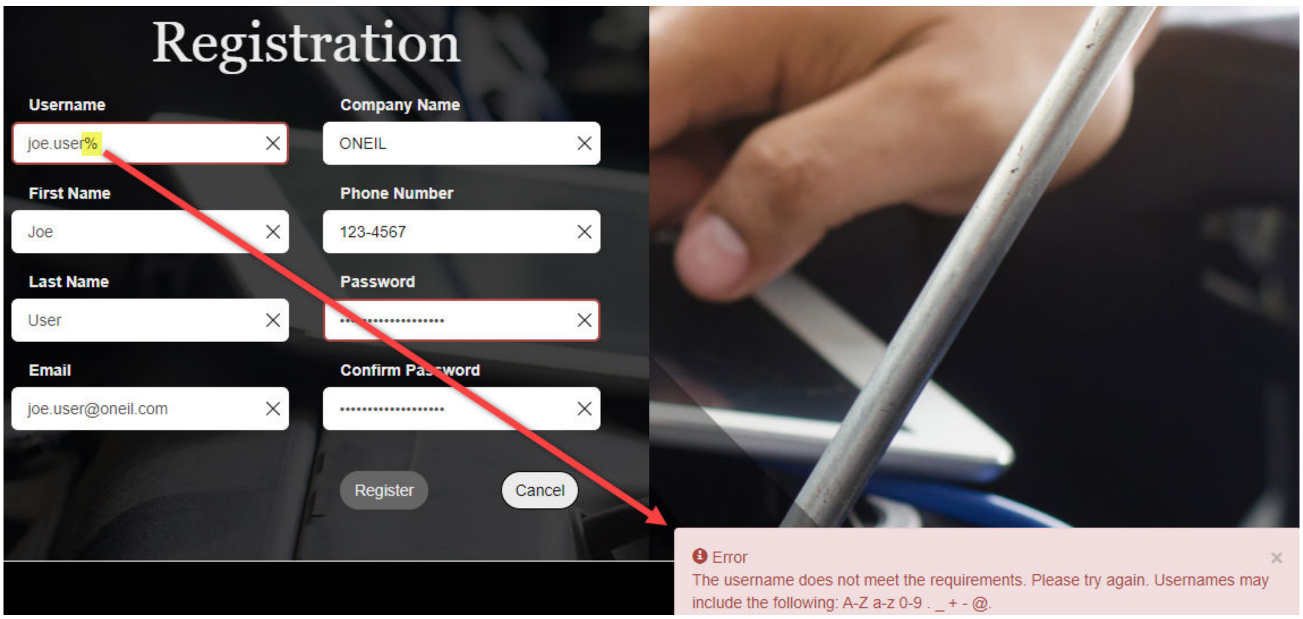


Figure 2-1. Registration Screen - Username

Passwords
If a user enters a character in the password window that is not valid, the following error message will display:

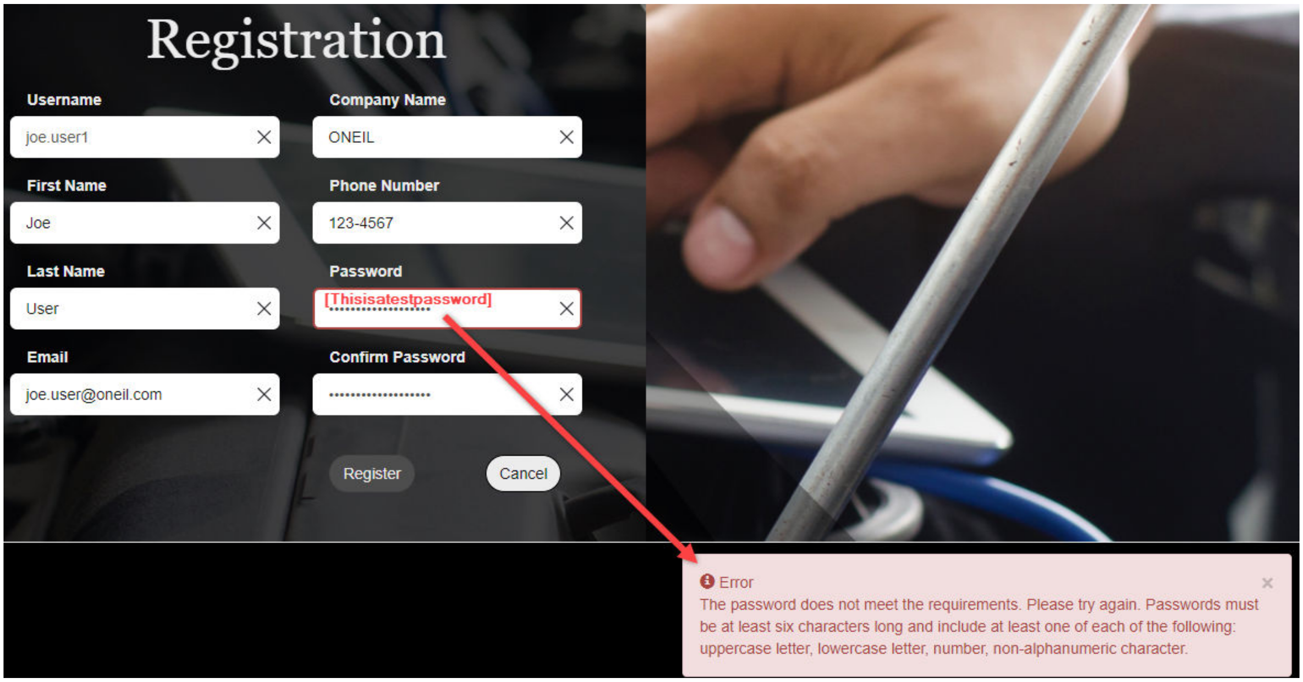


Figure 2-2. Registration Screen - Password

Automatic Logout

Users of the web version of the ONeSOURCE Client should be aware their accounts will be logged out after **30** minutes of inactivity. If this happens, users will be directed to the Login screen to log in once again. If users encounter any problems logging back in to their accounts, they should contact their Administrator for assistance.

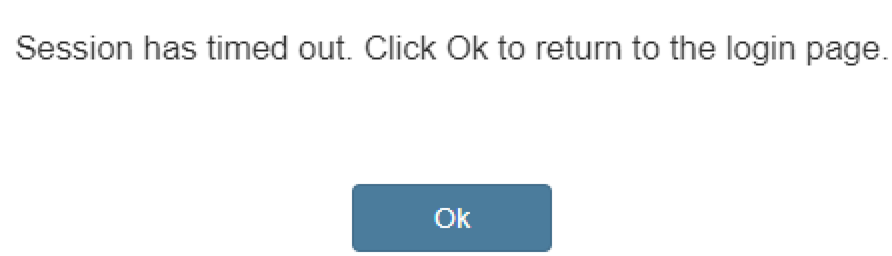


Figure 2-3. Session Timeout Message

NOTE: The timeout limit of 30 minutes can be altered to suit an organization's needs.

Home Page - Key Features

Introduction

The home page of the ONeSOURCE Client can be divided into four areas: a ribbon across the top with tabs to assist the user, the main search window, one or more browse sections (depends on the customer's configuration), and a section for previously viewed content:

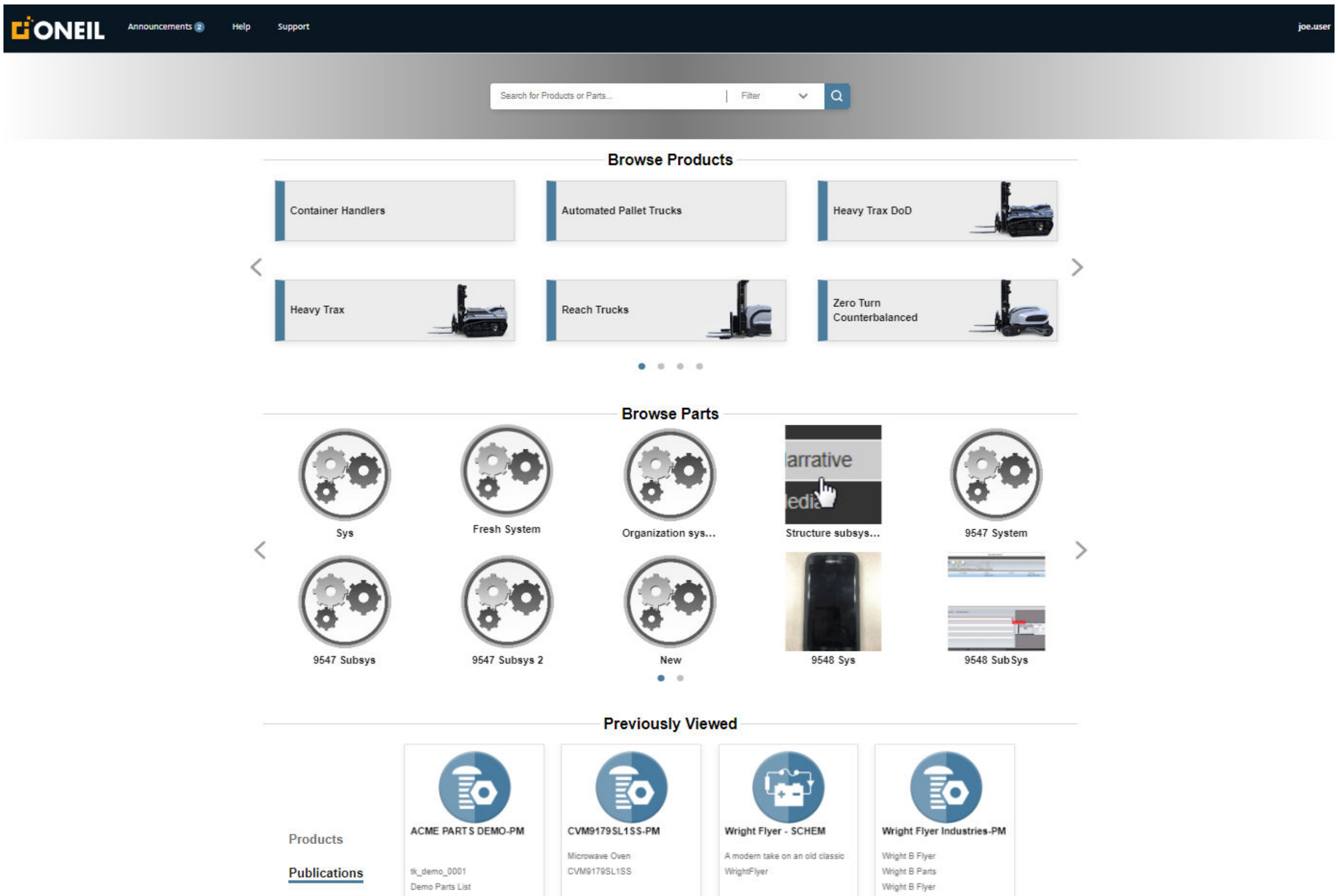


Figure 3-1. Client Home Page

It is from the home page of the Client that users select the information they are looking for be it a publication, a parts list, or an individual part. The main search window is a powerful tool to find new content, content that was previously searched, or content suggested by the system based on a user's search. If users are not looking for anything in particular and just want to browse content included in the ONeSOURCE Client, they can select items from the browse sections displayed on the home page just by clicking on them. If users would like to view content they've viewed before, they can select the items from the section showing previously viewed content.

Client Ribbon

The Client ribbon appears across the top of the ONeSOURCE Client with tabs to assist users while they are using the application:

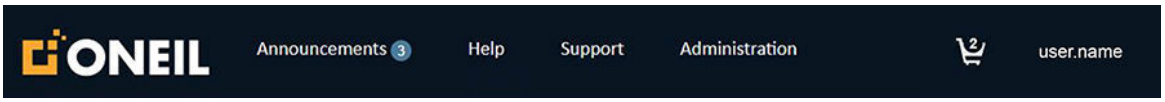


Figure 3-2. Client Ribbon

Table 3-1.

Feature	Function
Company Logo	Serves as home button to return user to home page when another button is not available.
Announcements	Contains announcements posted by customer administrator
Help	Opens the ONeSOURCE Client help document in a separate window
Support	Opens the Feedback page
Shopping Cart	Contains items added by the user to one or more pick lists
Username	Used to open the user profile or log out of the Client

Main Search Window

The main search window displays below the Client ribbon in the center of the page:

Figure 3-3. Main Search Window

Depending on customer configuration, users may see helper text in the search window (e.g., "Search for Products or Parts...") as well as a drop-down list of available filters to set prior to running the search. After entering a search without selecting a previously searched term or a system-generated search suggestion, click on the magnifying glass icon or press the Enter key to run the search.

See Entering a Search for more details.

Browse Content

Depending on customer configuration, users may see one or more sections to browse from. In the screenshot, users can browse products or parts. The items shown are provided by the system based on the content available in the Client.

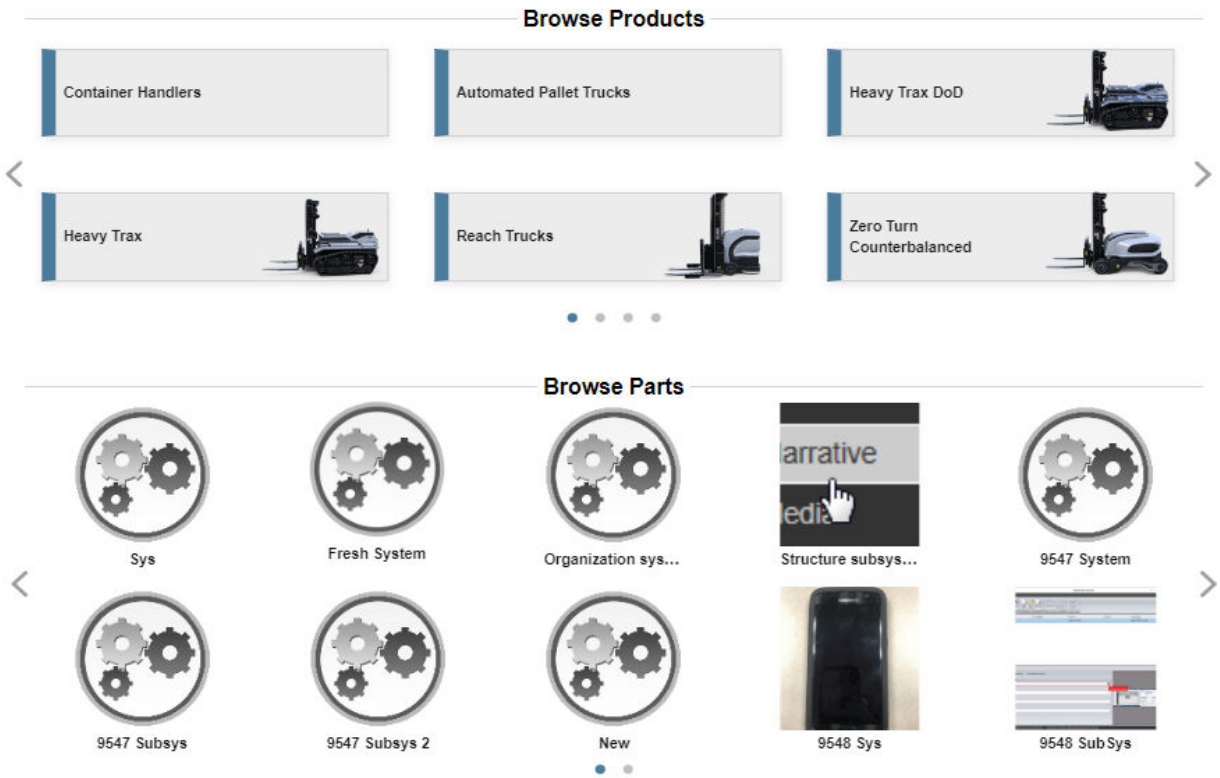


Figure 3-4. Browsing Content

See Browsing Products for more details.

Previously Viewed Content

Content the user has previously viewed will be listed here. Previously viewed content is divided into product and publication categories, which can be selected by the user. Navigation buttons allow users to scroll through the list if there are more items than can be displayed on one page.

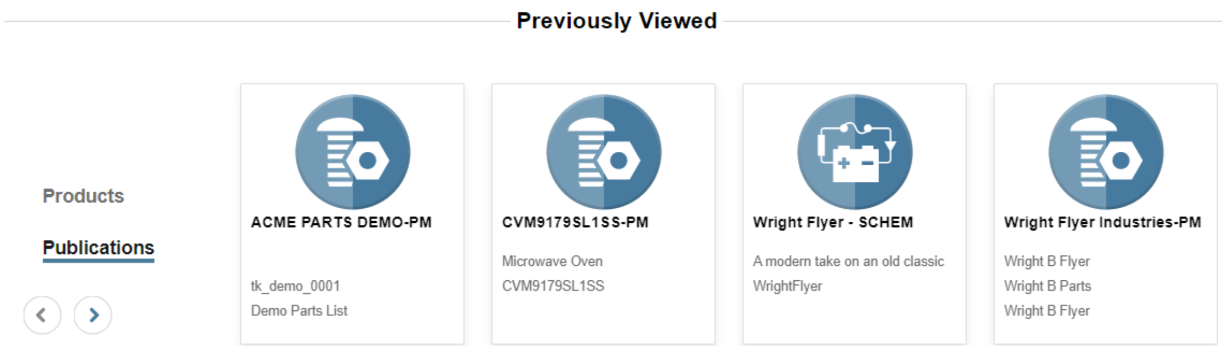


Figure 3-5. Previously Viewed Content

Main Search

Entering a Search

Searches performed in the application, including searches entered in the main search window, are "starts with" searches as opposed to "contains" searches, meaning the system will look for the search string at the beginning of the content and not in the middle of the content.

The main search window appears at the top of the landing page of the application.

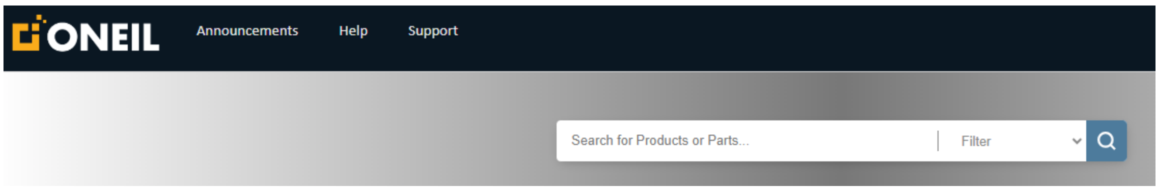


Figure 4-1. Main Search Window

To enter a new search

1. Place the cursor in the search window and click the left mouse button. The list of previously entered searches will display.

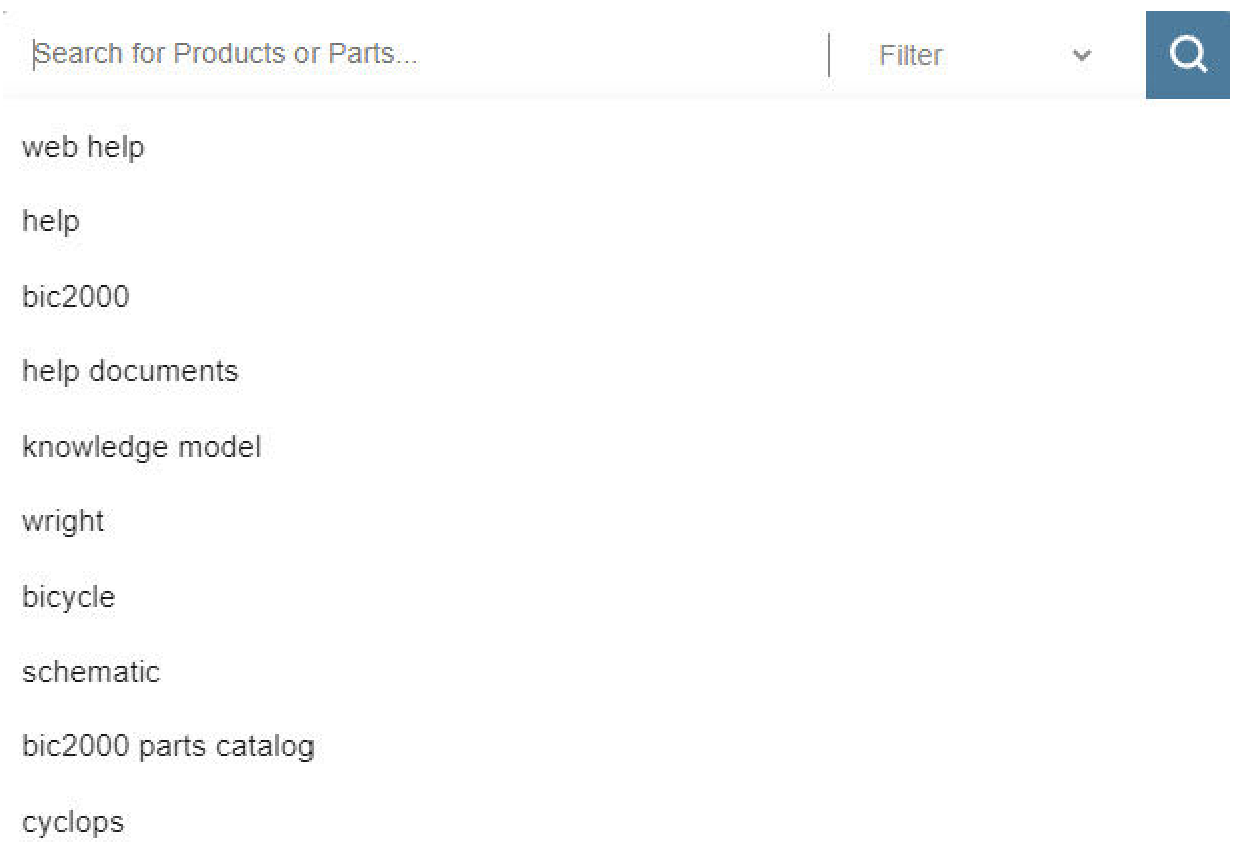


Figure 4-2. List of Previous Searches

2. The list of previous searches will disappear once you start typing.

3. After entering three characters, search suggestions will display based on the text you entered.

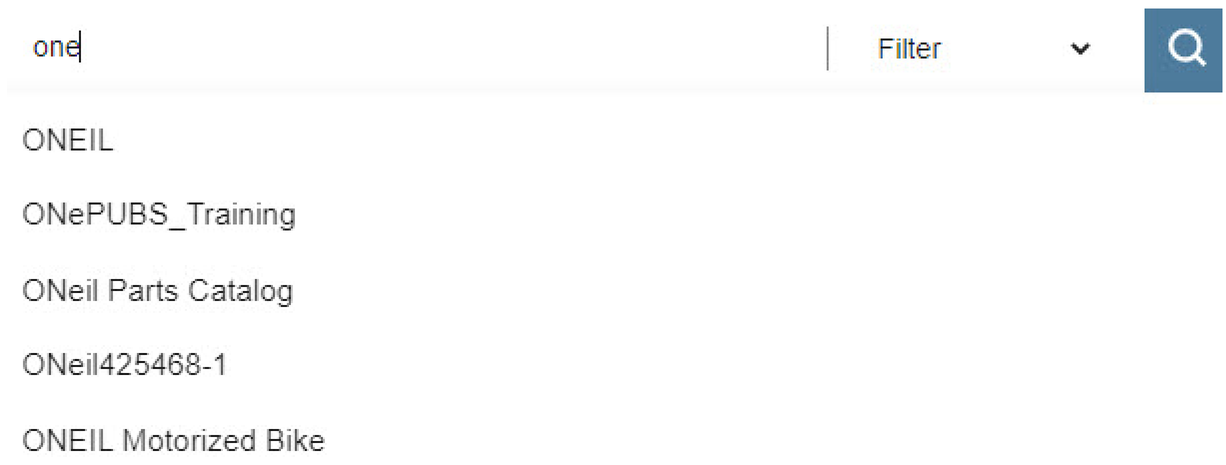


Figure 4-3. Search Suggestions

4. Depending on the customer's configuration, users must enter a minimum of one to three characters before a search can be executed. If a user tries to run a search containing less than the minimum number of characters and presses the Enter key, a message will display telling them to enter the minimum number of characters. Likewise, they will also see the message if they attempt to click on the magnifying glass icon.

Figure 4-4. Tooltip to Enter More Search Characters

NOTE: The minimum number of characters that needs to be entered prior to executing a search may vary depending on your configuration.

5. If no previous search or search suggestion is selected, the system will execute a search on the text entered when the user presses Enter or the maginifying glass icon.

Figure 4-5. Entering a Search

6. Search results are displayed for the text entered.

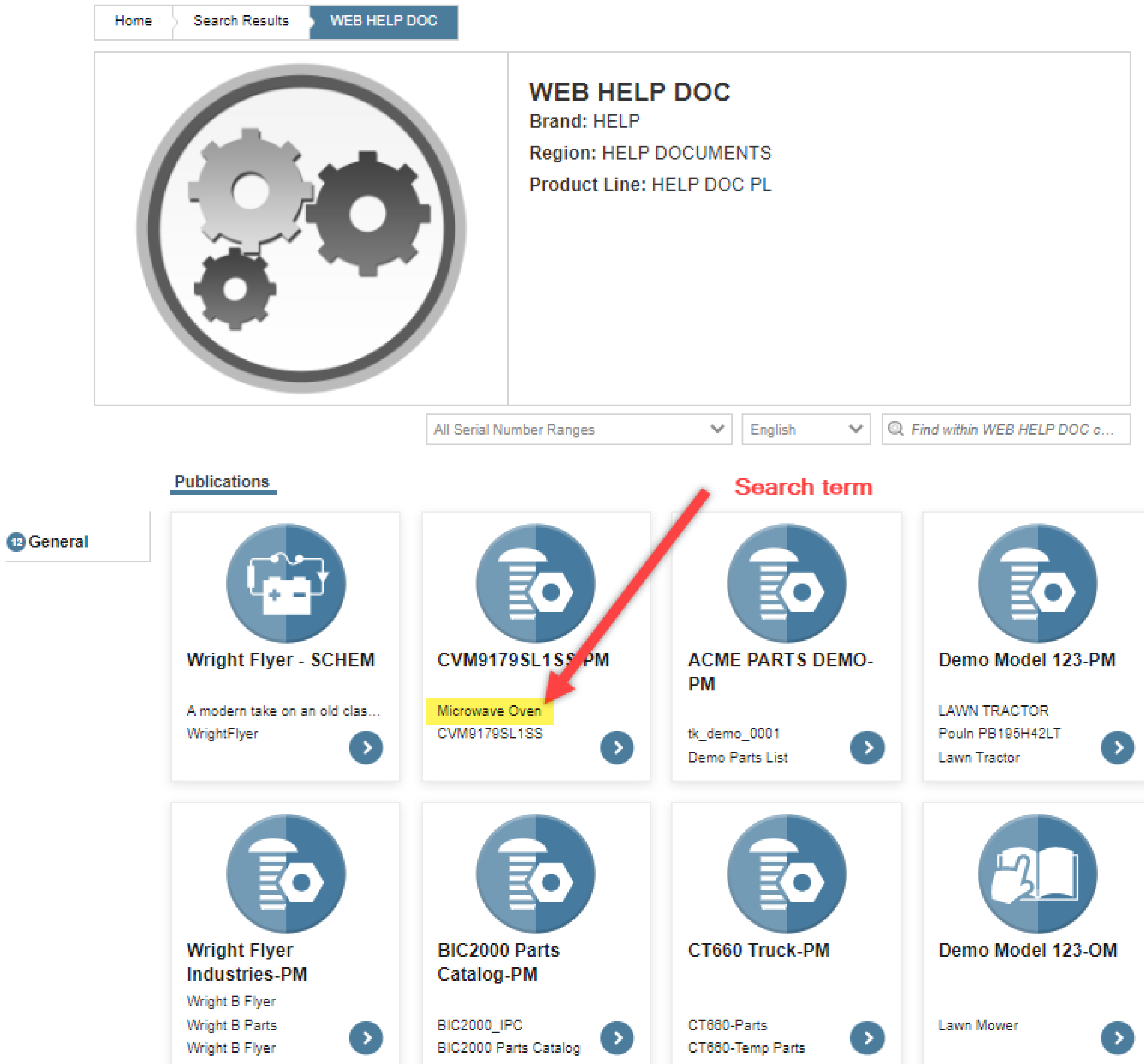


Figure 4-6. Search Results

NOTE: If the search term(s) are found in the data, the system will highlight it in the results.

Selecting a Previous Search

Users can retrieve searches they have run previously:

1. Place the cursor in the search window on the main screen and click the left mouse button:

Figure 4-7. Main Search Window

2. A list of previously entered searches will display, up to a maximum of 10 searches:

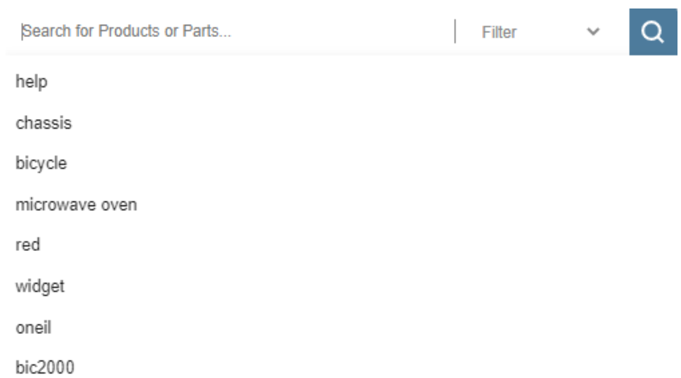


Figure 4-8. Previous Searches

3. If you find the search you want to run again, select it by clicking on the left mouse button:

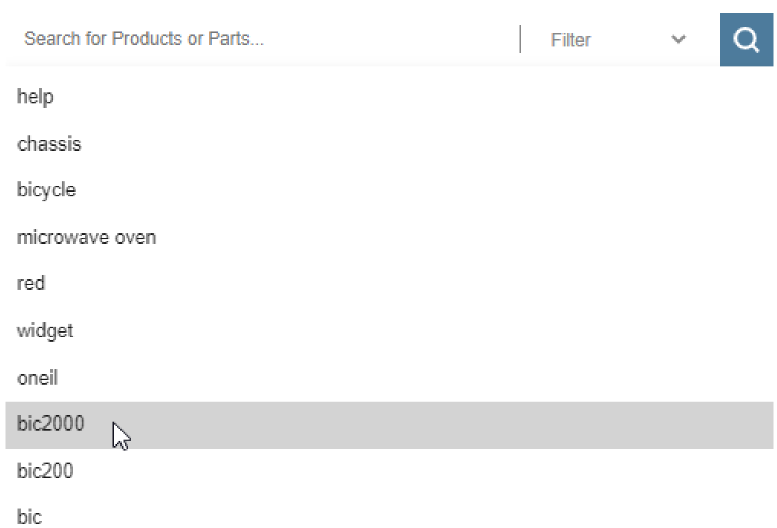


Figure 4-9. Select a Previous Search

4. The system will run the search again.

Selecting a Search Suggestion

Users can choose search suggestions provided by the system:

1. Place the cursor in the search window and click the left mouse button:

Figure 4-10. Main Search Window

2. A list of previously entered searches will display:

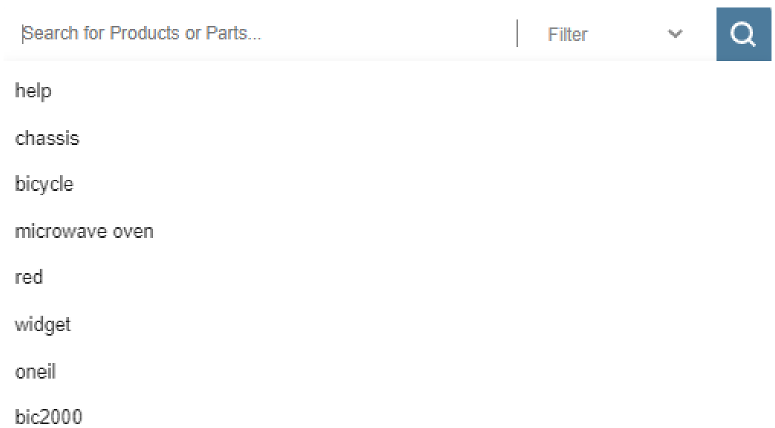


Figure 4-11. Previous Searches

3. Start entering your new search. The list of previous searches will disappear.
4. After entering 3 characters of the new search, up to 10 suggestions will display based on the characters entered:

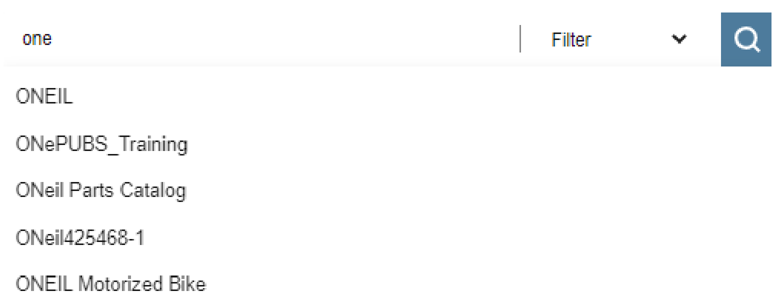


Figure 4-12. Search Suggestions

5. Select one of the suggestions from the list to have the system retrieve results.

NOTE:

a. The suggestions displayed are based on content that exists in the ONeSOURCE Client.

b. If a search filter is used, search suggestions will be limited to the filter selected (i.e., just to parts if the parts filter is selected).

Selecting a Search Filter Before Running a Search

Users may use one of the available search filters to narrow their search results:

1. The list of available filters can be displayed by clicking on the drop-down list.

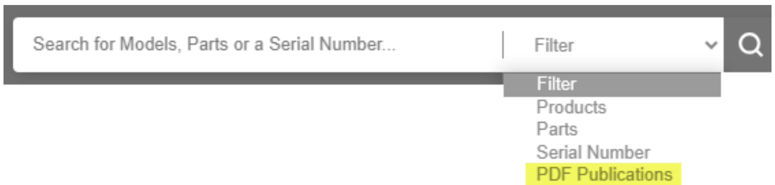


Figure 4-13. Filters Drop-Down

NOTE:

a. When the word "Filter" is displayed, it means no filter is applied. This is the default setting.

b. Some customer configurations may include "PDF Publications" in the list of search filters. This filter is for searching PDFs without product-level applicability.

2. Select one of the filters available per your customer configuration.

Figure 4-14. Search Filter Selected

NOTE: With the parts filter selected above, the system will only search for parts that match the search entered.

3. Enter a search, select a previous search, or select a suggested search and press **Enter** or click on the magnifying glass icon to run the search.

Using the Serial Number Search Filter

To Filter Your Search by a Serial Number

1. Enter a serial number in the main search window and select the serial number filter from the drop-down list:

Figure 4-15. Main Search Window with Serial Number Filter Selected

2. Press **Enter** or click the maginifying glass icon to execute the search:

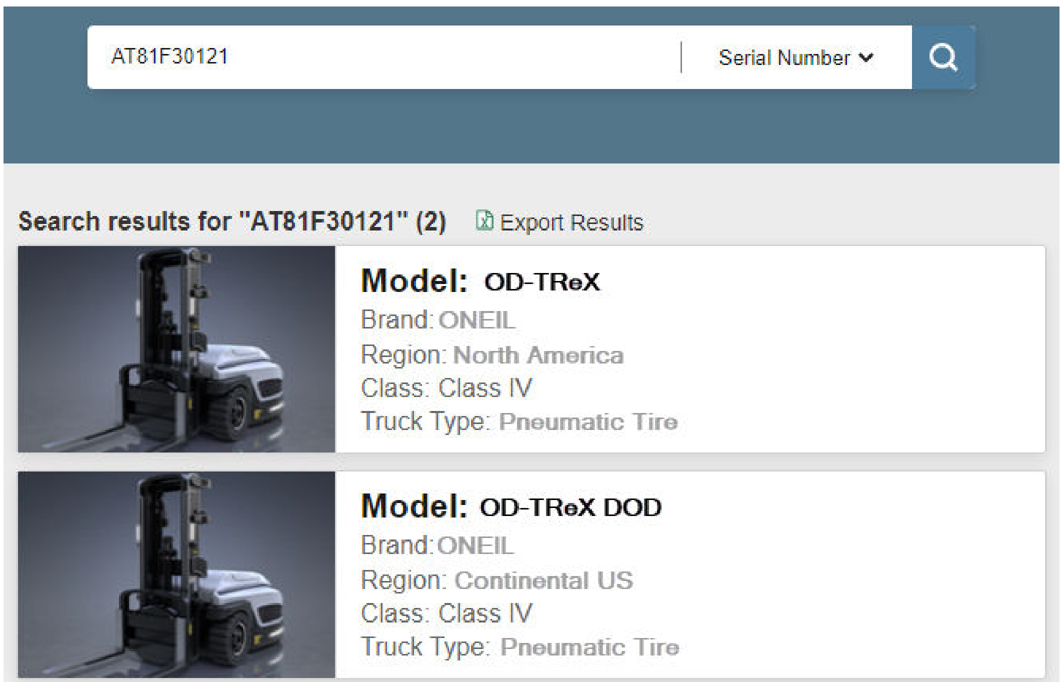


Figure 4-16. Serial Number Search Results

3. Open a search result:

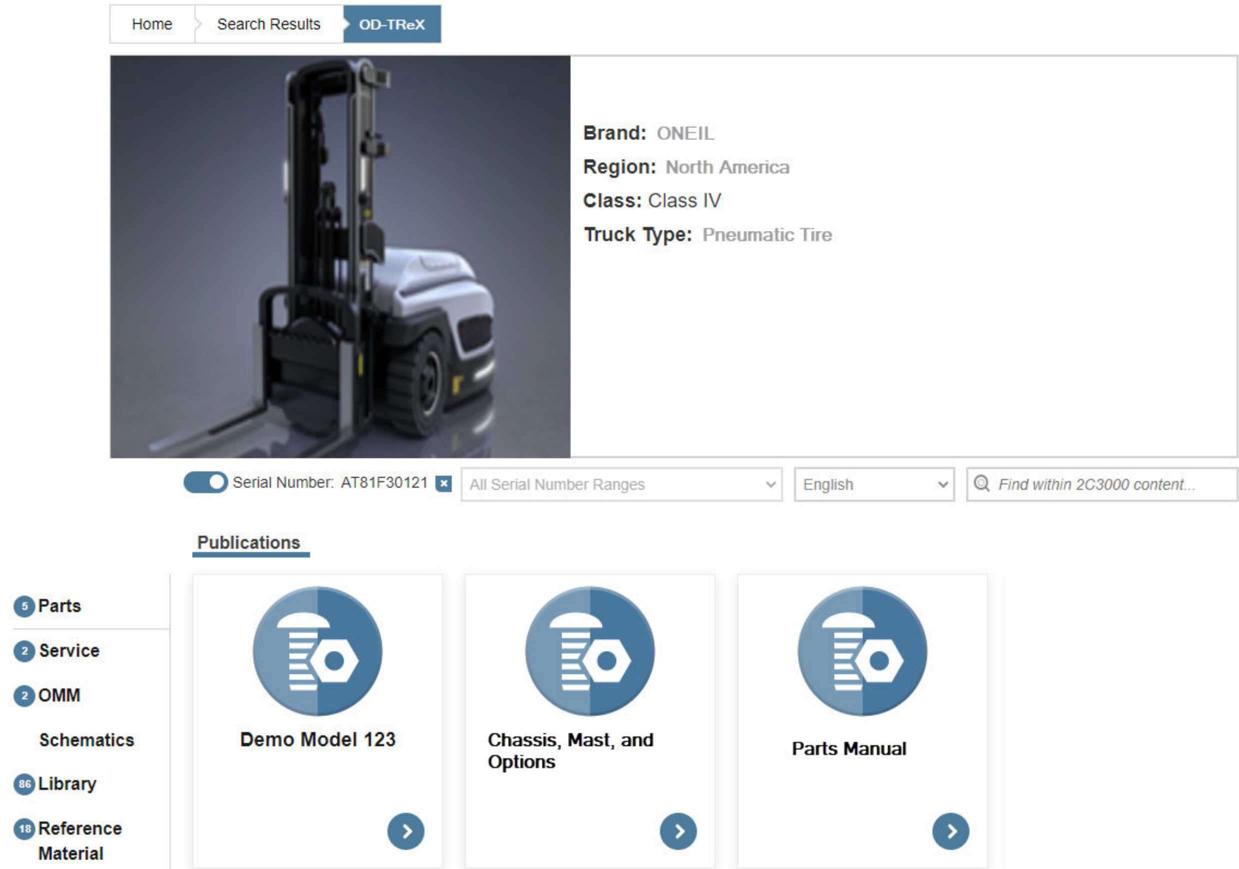


Figure 4-17. Product Details Screen

NOTE:

a. The serial number toggle button is turned on by default. Toggle it off to display more results.

b. By turning the serial number toggle off, you will see all of the content for the selected item (in this example, the OD-TReX). You can confirm this by looking at the numbers displayed in the content filter badges on the left change accordingly.

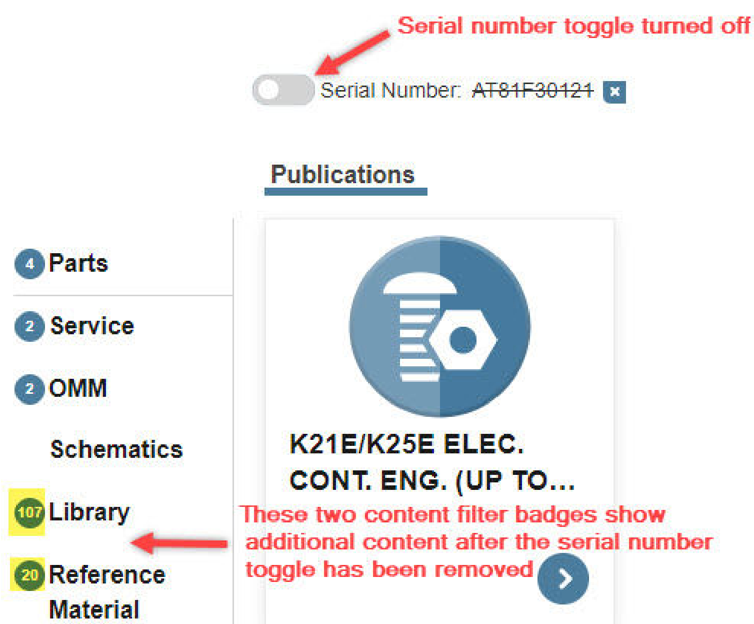


Figure 4-18. With Serial Number Toggle Off

NOTE: Compare the number of results in this screenshot to the results for Library and Reference Material categories in the previous screenshot.

4. After searching a serial number-specific product, the product card for that product, displaying the serial number previously entered, will appear in the Previously Viewed section of the home page.

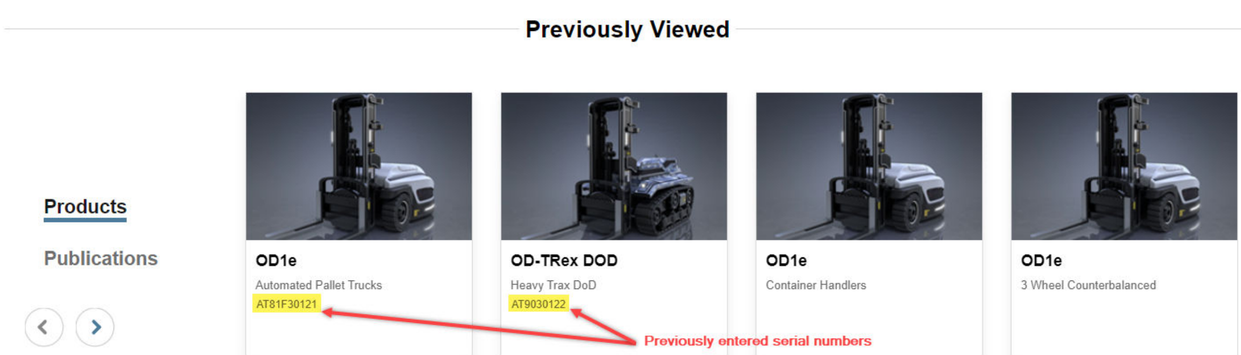


Figure 4-19. Prevoiusly Viewed Content

Search Results Limit

The application will display up to 1,000 results following a search in the main search window. If more than 1,000 results are returned, the following message will display to users:

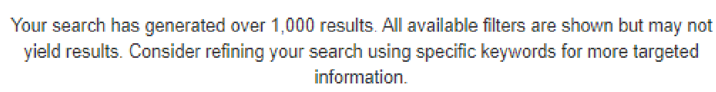


Figure 4-20. Too Many Search Results Message

If the search is run with a single filter applied, such as "Products", and more than 1,000 results are returned, the message above will display on the same screen as the results.

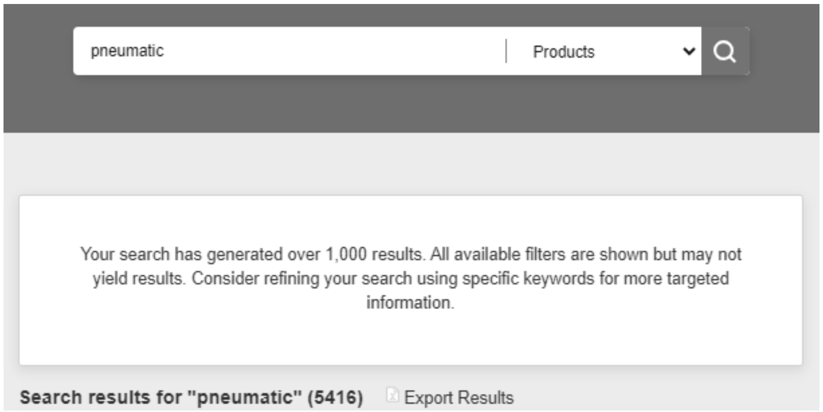


Figure 4-21. Search Run With Filter

NOTE:

1. The "Products" filter has been applied prior to running the search on the term "pneumatic".
2. If the "Export Results" is clicked, and the total number of results is greater than 1,000, only the first 1,000 results will be exported.

If the search is run without filters and more than 1,000 results are returned in a category such as Products, Parts, Publications, etc., the message will display when the user clicks on the "See All" link above the category.

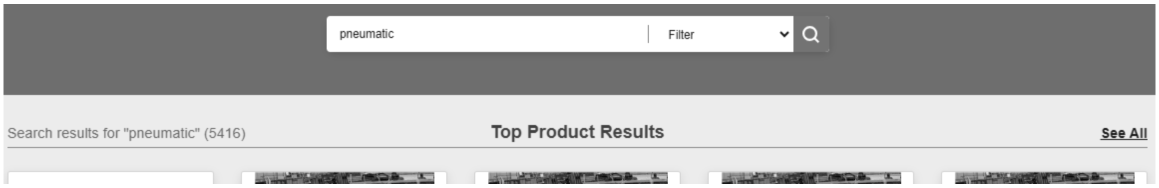


Figure 4-22. Search Run Without Filters

NOTE: Users can click "See All" to view search results for the category (e.g., "Products"). If there are more than 1,000 results, the message and the first 1,000 results will display.

If they are configured to have them, users can apply filters to the results and refine the search to narrow it down to 1,000 results or less.

If the customer's configuration does not include the use of search filters to refine their search, users will need to revise their intitial search if they want to narrow their results down to fewer than 1,000.

'Find Within' Search

'Find Within' Searching

The 'Find within' search window, like filters, allows users to narrow down search results to find the content they are looking for quickly and easily. 'Find within' searches are run *after* a search has been run in the main search window. 'Find within' searches, like searches performed in the main search window on the ONeSOURCE Client home page, are "starts with" searches as opposed to "contains" searches, meaning the system will look for the search string at the beginning of the content and not in the middle of the content.

The 'Find within' search window appears in multiple places throughout the ONeSOURCE Client:

- Product and Parts Details Page

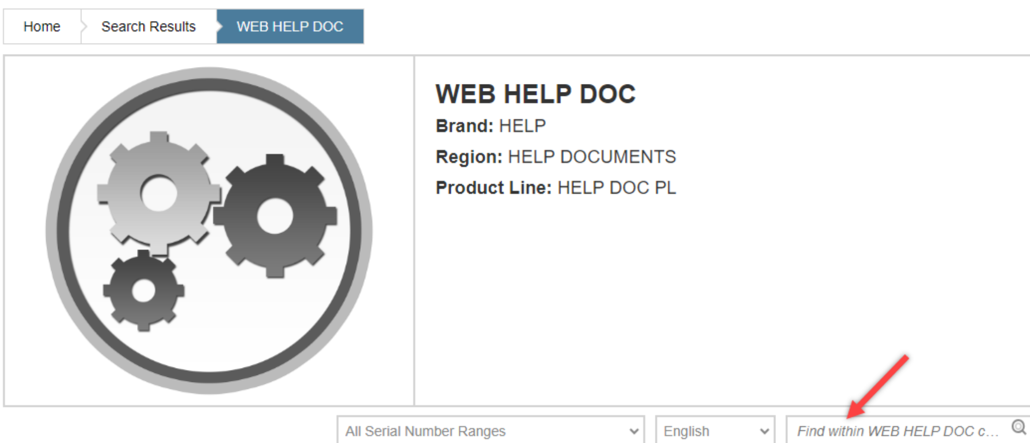


Figure 5-1. Product Details Page Shown

- Viewer for (Parts, Service, Schematic, Knowledge Model, and Diagnostic Troubleshooting publications)

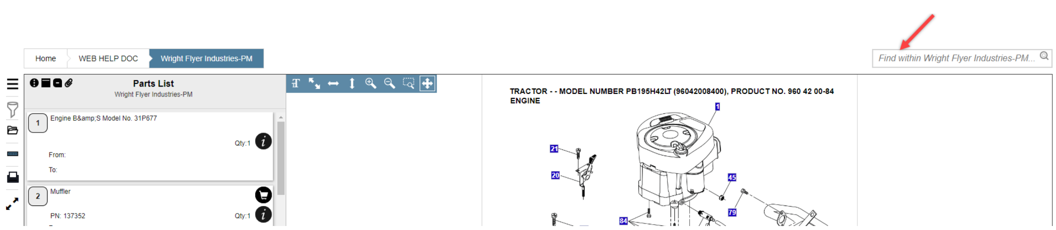


Figure 5-2. Parts List Viewer Shown

- TOC Overlay

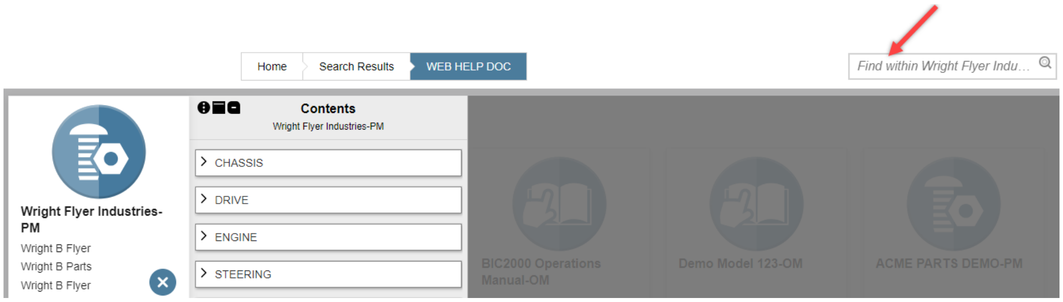


Figure 5-3. TOC Overlay

As with the main search window, users must enter at least three characters in the "Find within" search window in order to perform a search.

The "Find within" helper text will appear in the search window but the text after "Find within" will change depending on the source that is associated to the "Find within" window. When the user presses the Enter key after typing in a search in the "Find within" search window, the helper text will disappear.

The "Find within" search window is good for narrowing down a set of search results if the user is looking for a specific search term. If you want to narrow down search results according to various criteria defined by your customer configuration, use the available filters that display on the search results page.

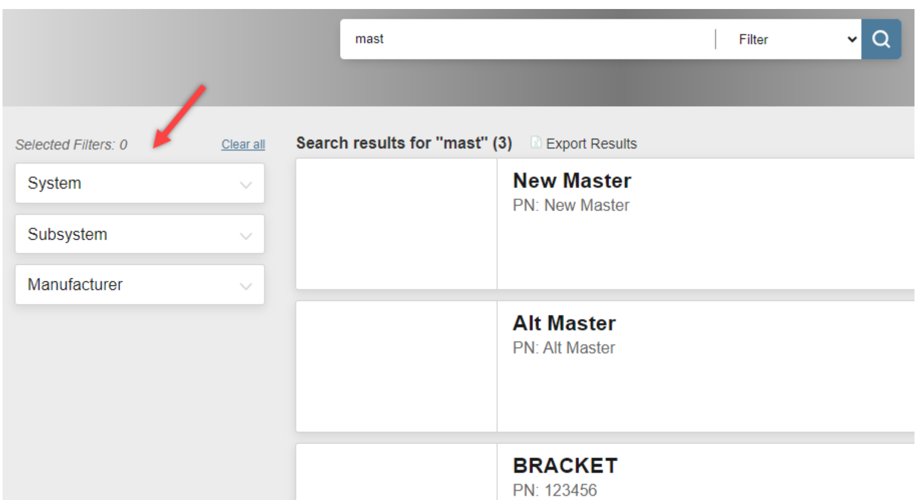


Figure 5-4. Search Results Page

Refer to Filtering Search Results for more details.

Browsing Content

Browsing Products

Depending on the user's configuration, a Browse Products section may display on the ONeSOURCE Client home screen below the main search window.

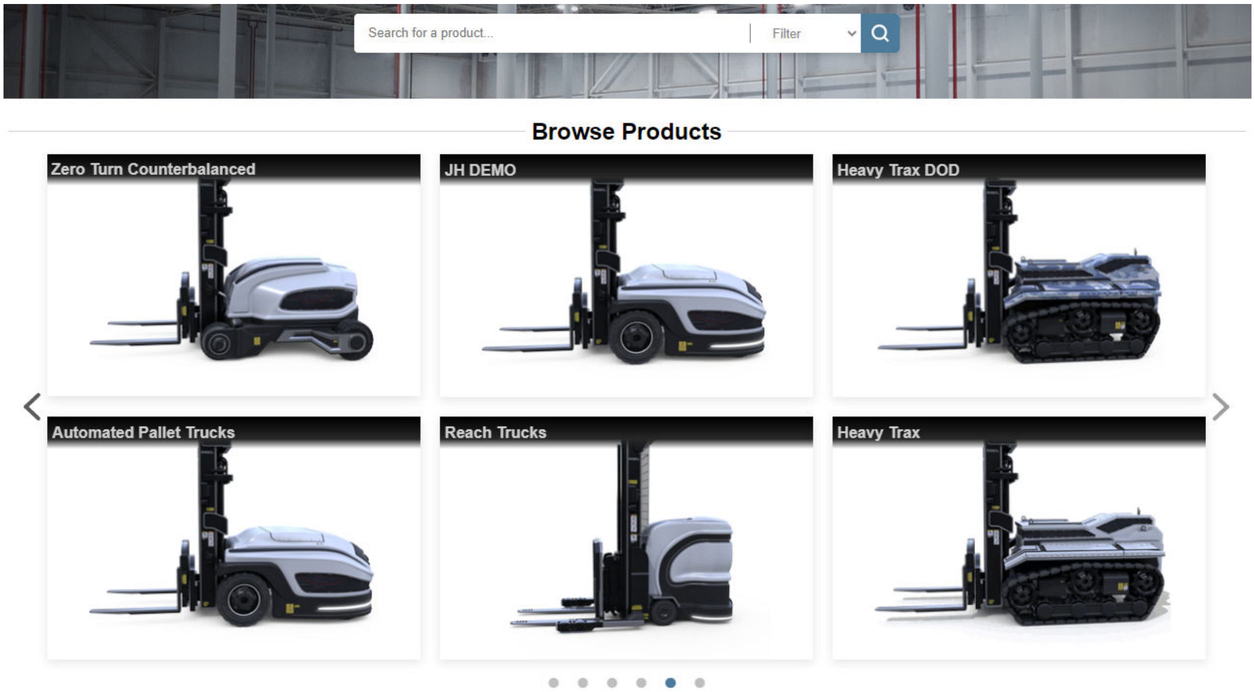


Figure 6-1. Browse Products

Up to six products can be displayed at a time on the home screen. If there are more than six, navigation arrows display on either side of the Browse Products section so users can scroll through the carousel of the complete list of sources. In addition, dots below the two rows of products indicate how many browse product screens there are. The dot for the active screen is filled in. An empty dot indicates a screen is available but not currently shown.

To select a source from Browse Products, click on it with the left mouse button to open the Product Details screen.

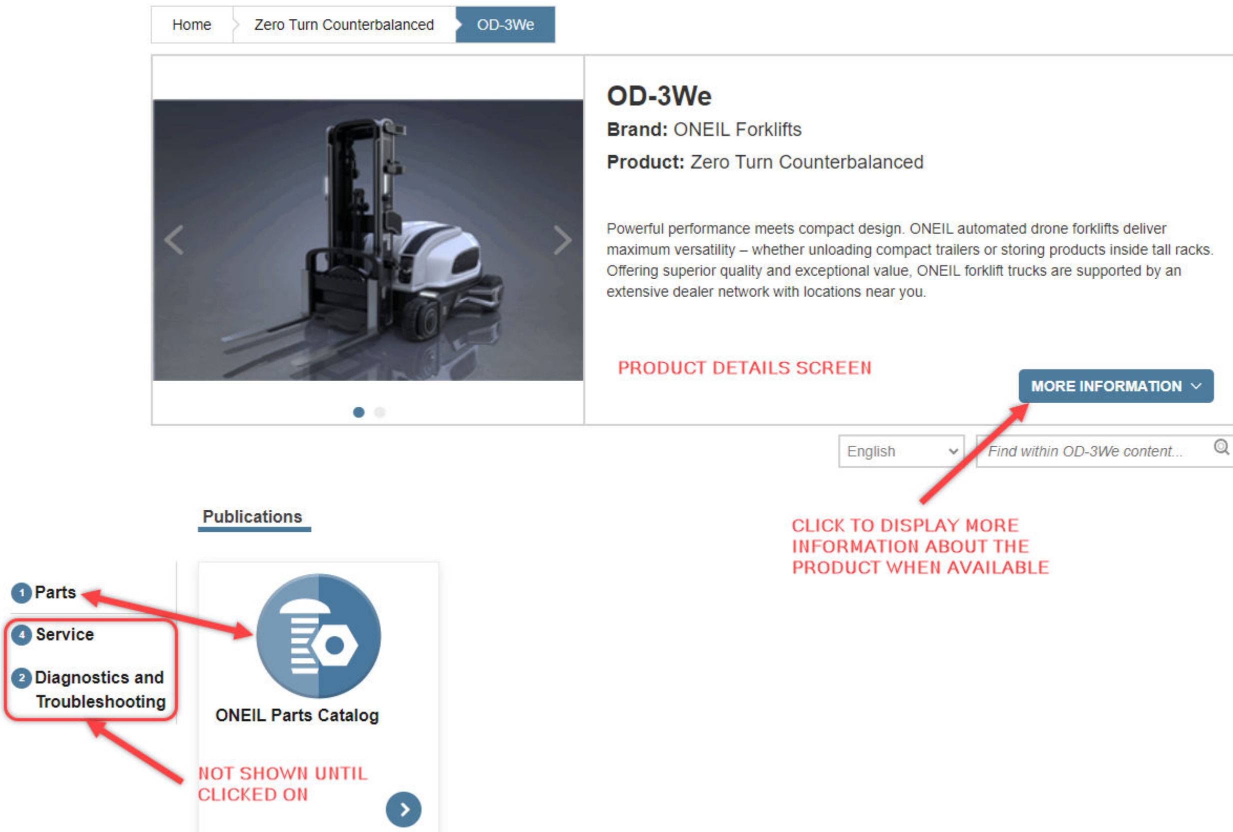


Figure 6-2. Product Details Screen

1. Expand the "More Information" dropdown, when one is available, to display additional information about the product.

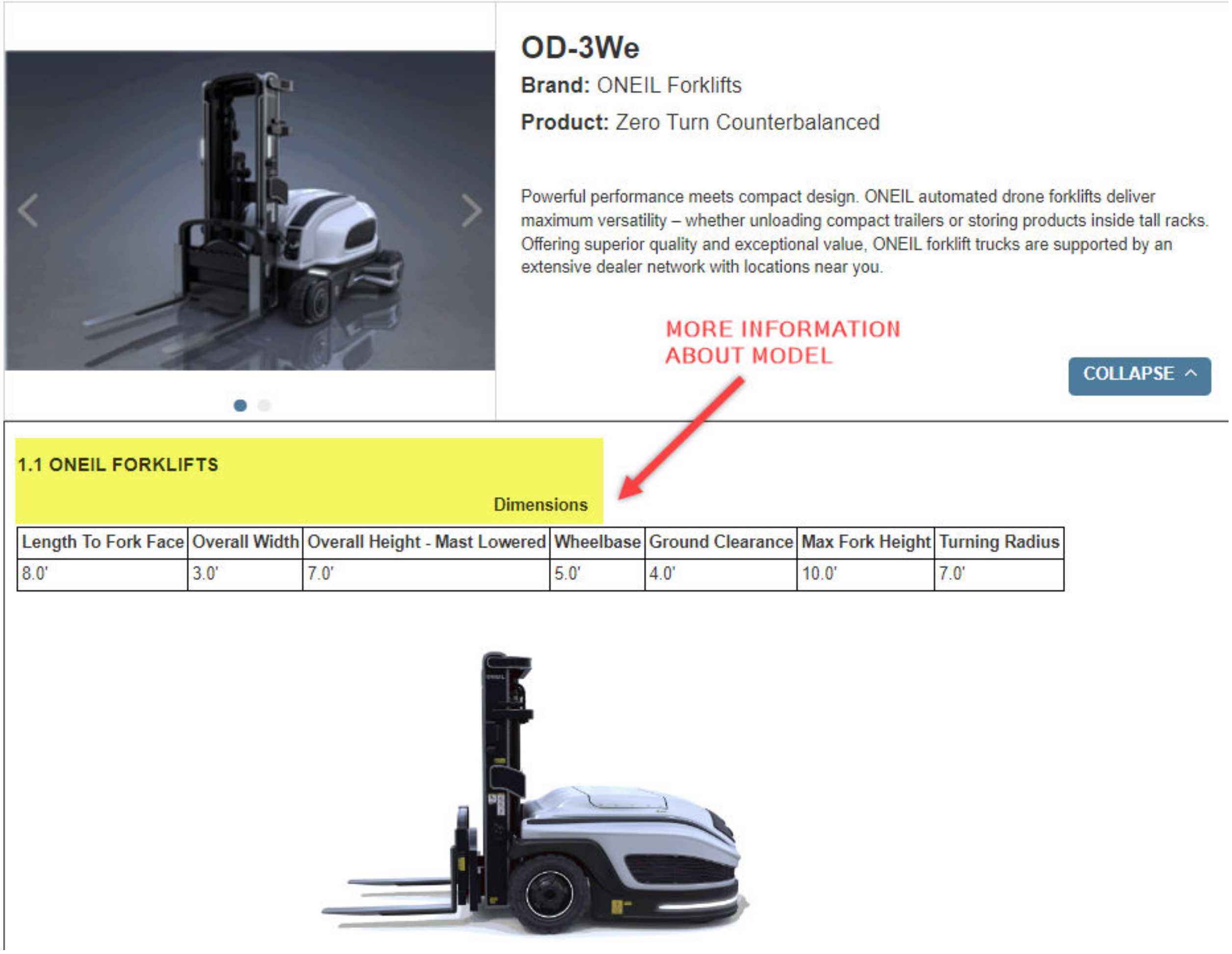


Figure 6-3. More Information Displayed

2. Click the Home link in the breadcrumb or the back button to return to the home screen.

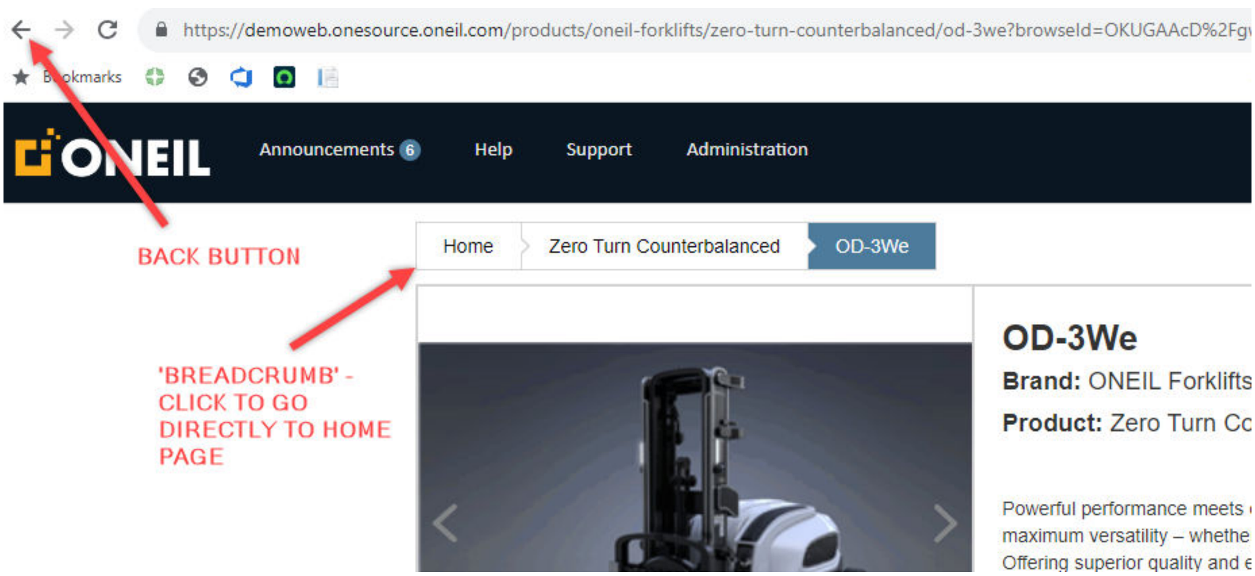


Figure 6-4. Home Page Links

NOTE: Clicking the customer logo in the upper left corner of the browser may also return the user to the home screen.

Browsing Parts

Depending on the user's configuration, a Browse Parts section may display on the ONeSOURCE Client home page below the main search window and Browse Products section.

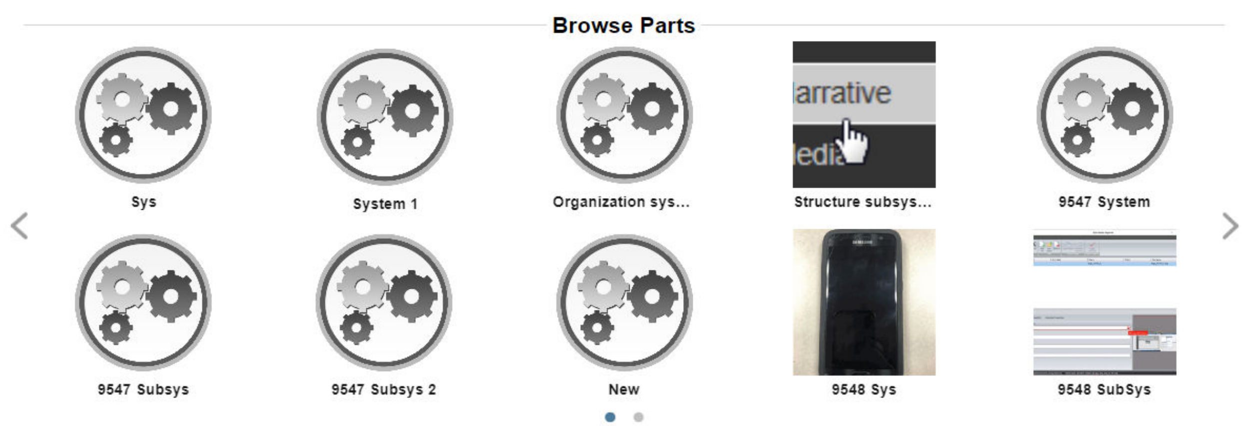


Figure 6-5. Browse Parts

Up to 10 parts sources can be displayed at a time on the home page. If there are more than 10, navigation arrows display on either side of the Browse Parts section so users can scroll through the carousel of the complete list of sources. In addition, dots below the two rows of parts indicate how many browse parts screens there are. The dot for active screen is filled in. An empty dot indicates a screen is available but not currently shown.

To select a source from Browse Parts, simply click on it with the left-mouse button to open the Parts Details screen.

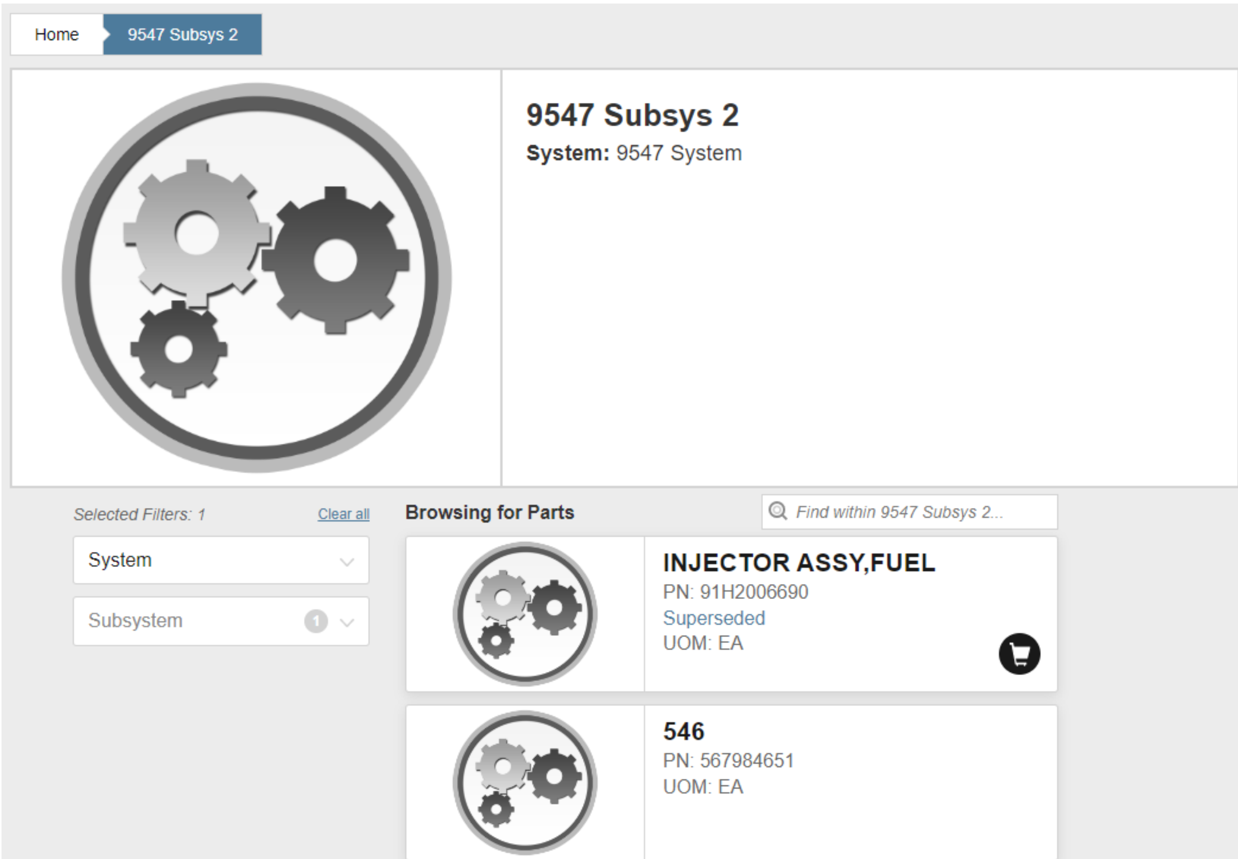


Figure 6-6. Parts Details Screen

Previously Viewed Content

After browsing content in the ONeSOURCE Client, a list of previously viewed products and publications will be displayed at the bottom of the home page.

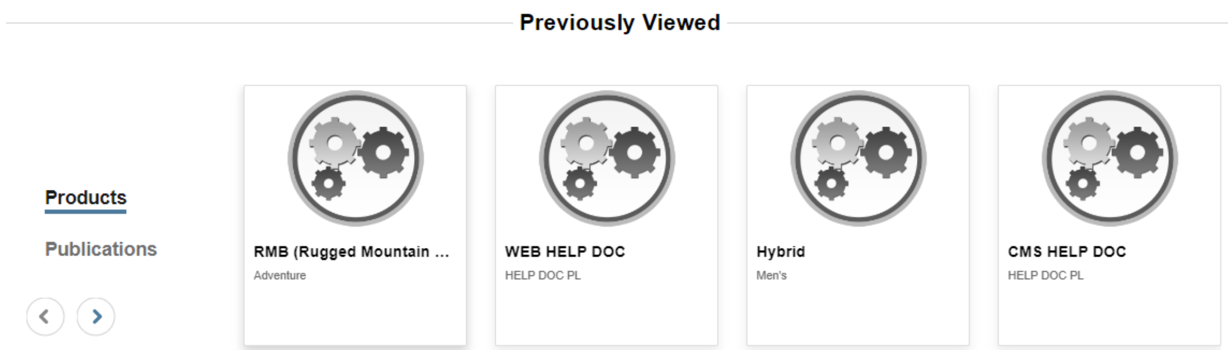


Figure 6-7. Previously Viewed Content

Previously Viewed Products

This is the default view users see when looking at the **Previously Viewed** content section. When there are more products that can fit on one screen, users can use navigation buttons to scroll to other previously viewed products. Clicking on a product image will open its product details page.

Previously Viewed Serial Numbers

After entering a serial number in the main search window and selecting an associated model, the serial number will be added to the Product card displayed in the list of previously viewed products in the **Previously Viewed** section.

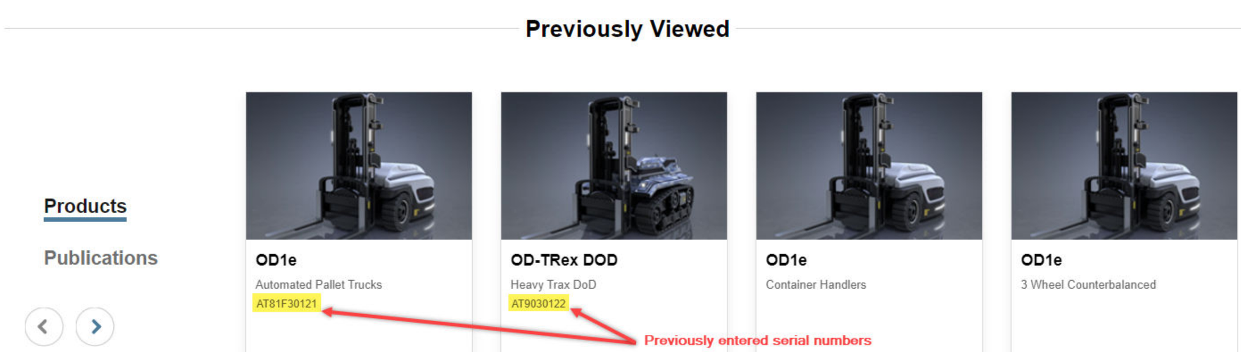


Figure 6-8. Previously Viewed Serial Number Products

When users click on a Product card with a serial number displayed, they will be taken to the Product Details screen with content filtered based on that serial number.

Previously Viewed Publications

To view previously viewed publications, click Publications and the list will switch from a list of products to a list of publications.

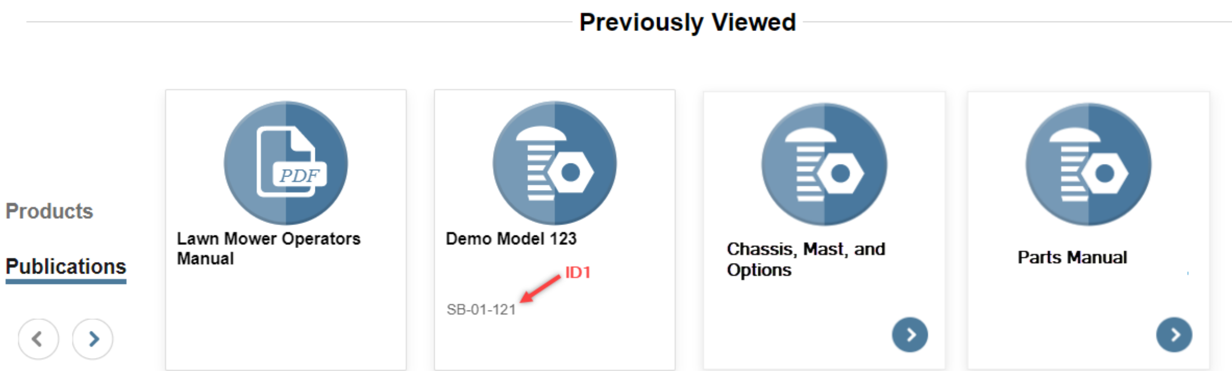


Figure 6-9. Previously Viewed Publications

Clicking on a specific publication image will open its publication details page.

NOTE: In the screenshot above, publication titles are shown in bold. In addition to the publication's title (Title 1), fields for a secondary title (Title 2), ID1, and ID2 will display on the publication cards shown in the screenshot if they are populated. One of the publication cards above shows a value for ID1. ID1 and ID2 can be used, for example, to identify media content associated to a publication. Depending on the customer configuration, all four fields can be authored in the ONeSOURCE Content Management System (CMS).

NOTE: After viewing a module and returning to the Product details page, the family content that was previously selected will be selected by default.

Content Families

Narrative Publications

Unlike Parts lists that mostly display line items and graphics, Narrative Publications can display narrative text (paragraphs), tables, lists, links, and both embedded and stand-alone graphics. Operating and service manuals fall into the narrative publication category.

The contents of narrative publications, the sections and subsections, display as cards or tiles on the left of the viewer, while images corresponding to the sections display on the right. Users can open the contents of the section/subsection by clicking either the card or its image.

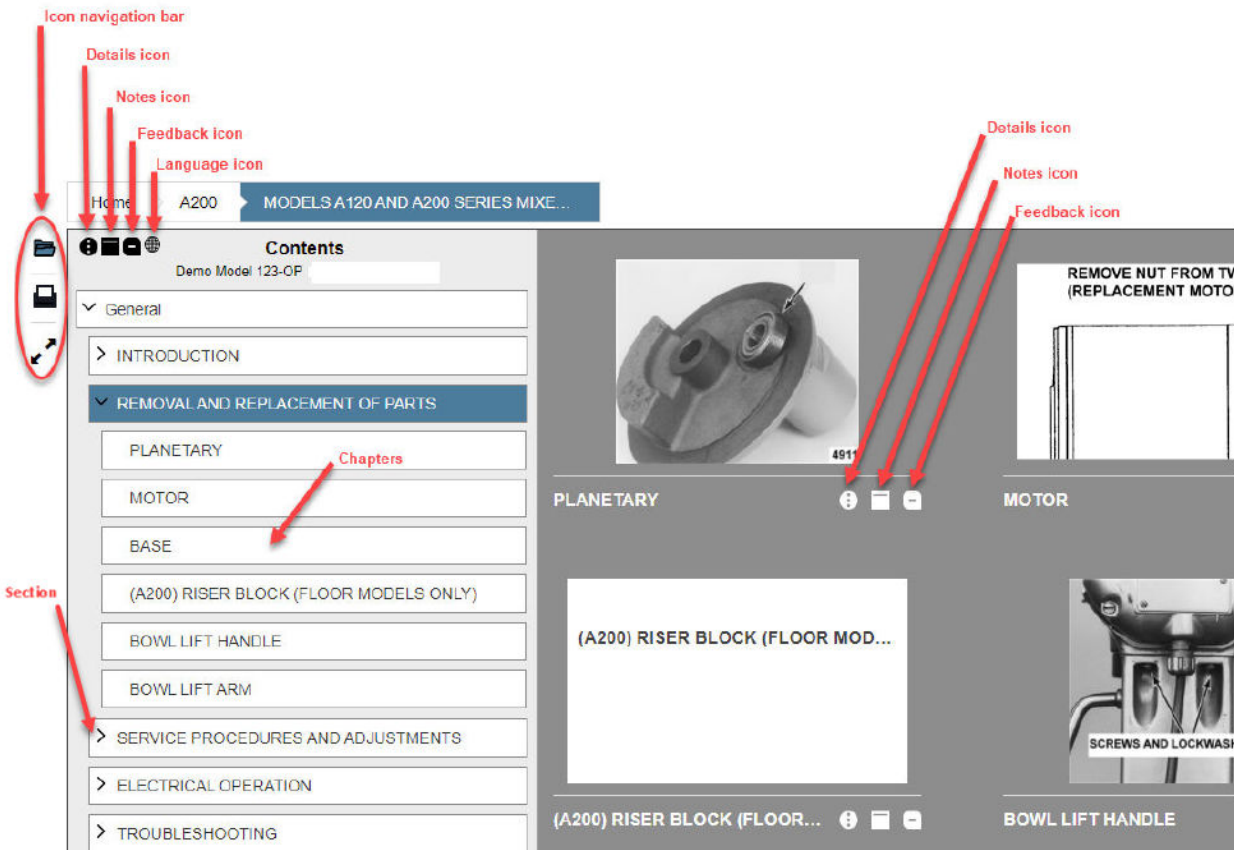
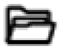
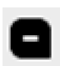


Figure 7-1. Operating and Service Publication Viewer

NOTE: Users can expand and collapse the list of contents by clicking on the arrows to the left of the cards.

Table 7-1. Legend to Icons

Icon	Function
	Hides or displays the table of contents
	Print
	Enter full screen mode
	Exit full screen mode
	Display details - displays additional details about the item in a pop-up window
	Add note - Adding a new note in the pop-up window will change the note icon green
	Send feedback - opens a pop-up window to enter and submit a feedback on the item
	Select language - opens a pop-up window of translations

Parts Publications

1. Individual parts lists display as a list of tiles on the left of the viewer, with corresponding parts images on the right. All of the cards or tiles in the contents are part of the same Parts publication.

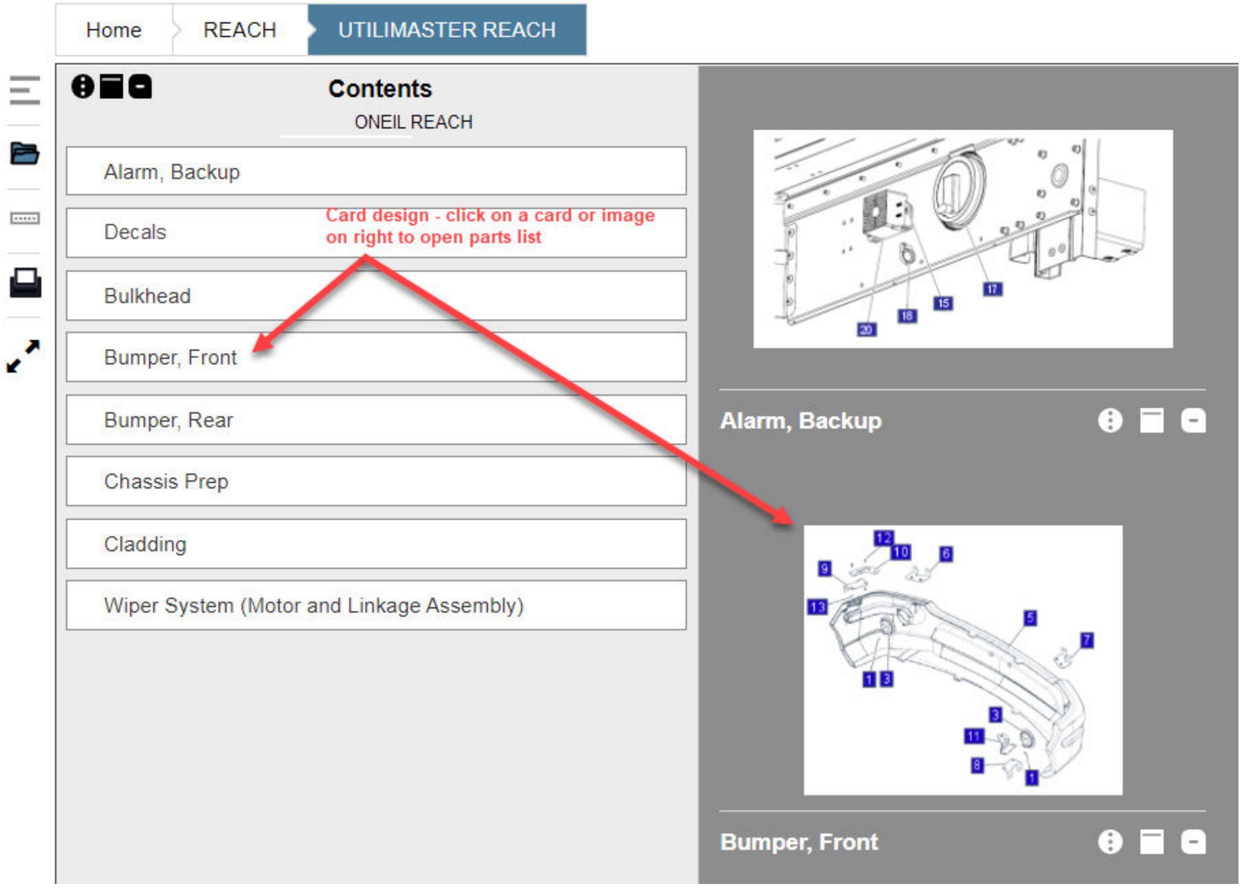


Figure 7-2. Parts Publication Viewer

2. Users can use the icon bar to the left of the contents list to perform different actions. There are additional icons across the top for viewing details, adding notes, or sending feedback. There are also icons inside each line item to view part-specific details and to add the part to the pick list.

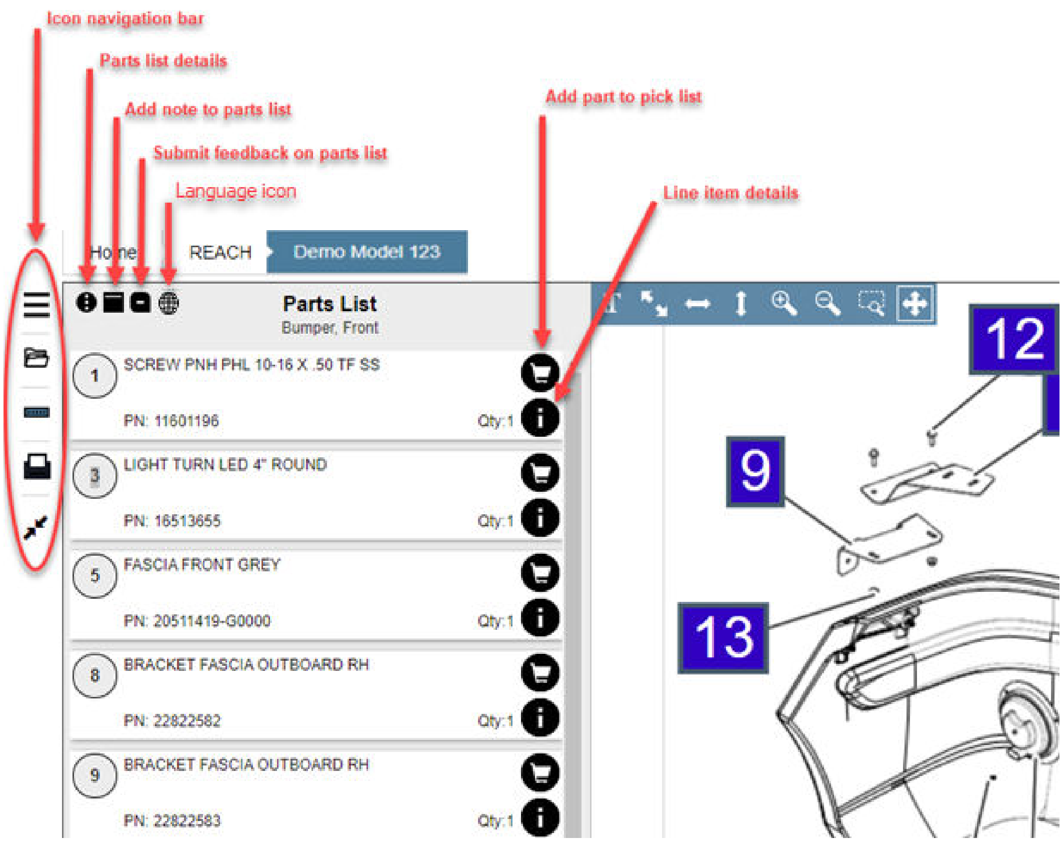
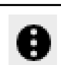
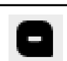
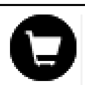
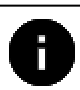


Figure 7-3. Parts Viewer Icons

Table 7-2. Legend to Icons

Icon	Function
	Hides or displays the line items for the selected parts list
	Hides or displays the table of contents (line items)
	Hides or displays the toolbar (shown in blue at the top of the part image)
	Print
	Enter full screen mode
	Exit full screen mode
	Display parts list details
	Add note - Adding a new note in the pop-up window will change the note icon green
	Send feedback - opens a pop-up window to enter and submit a feedback on the item
	Adds the line item/part to the selected pick list
	Display the parts line item flyout
	Select Language - Opens a pop-up window of available translations

See the section Using Parts Line Item Flyouts and other sections under Parts Publications for more details.

Knowledge Model and Diagnostic Troubleshooting Publications

Knowledge Models and Diagnostic Troubleshooting publications belong to a content type that provides interactive solutions designed to assist users during troubleshooting. Knowledge Models start with observed symptoms and direct the user through a series of steps to resolve the issue. Diagnostic Troubleshooting publications use diagnostic troubleshooting codes (DTC) to investigate causes and arrive at solutions.

The user interface in the ONeSOURCE Client for both are very similar. Below is an example of a Knowledge Model publication.

To view and interact with knowledge models

1. Select a Knowledge Model source.

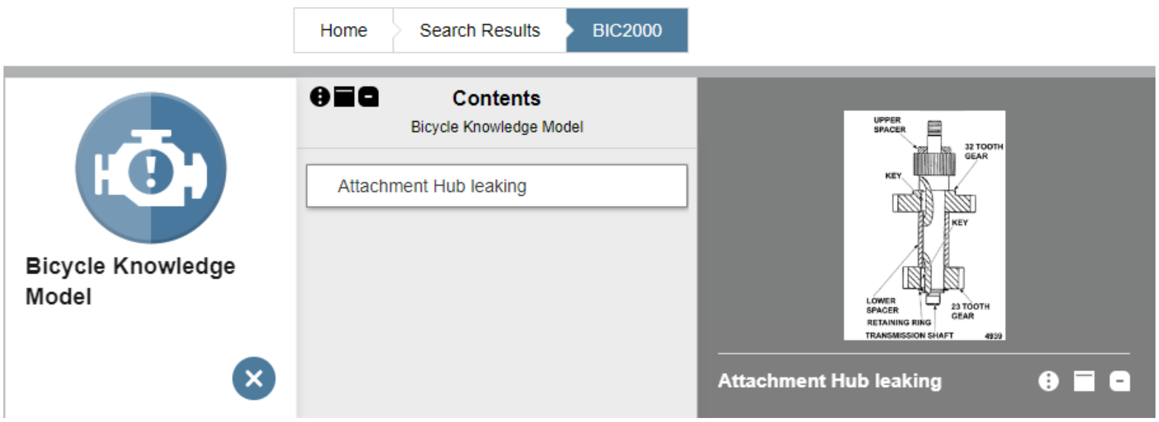


Figure 7-4. Knowledge Model Viewer

2. Click on a symptom (e.g., Attachment Hub leaking) from the list of symptoms on the left, or click the image corresponding to the symptom on the right.

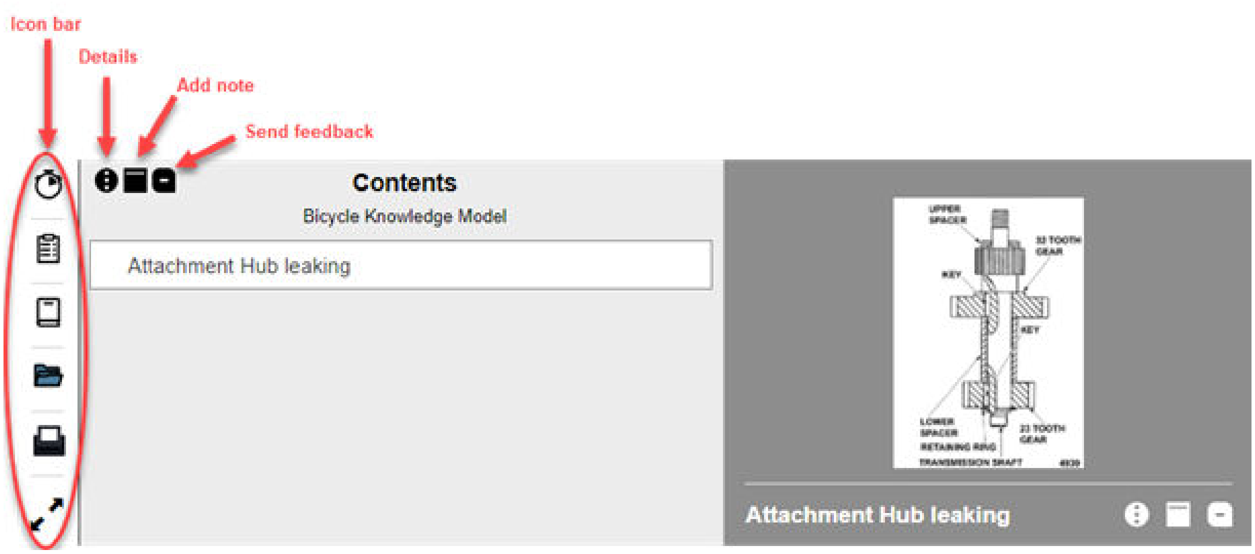
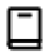


Figure 7-5. Knowledge Model Viewer Icons

3. Use the various icons on the left when going through the Knowledge Model.

Table 7-3. Legend to Icons

Icon	Function
	Displays individual Knowledge Model sessions
	Displays causes
	Displays the log
	Hides or displays the table of contents
	Print
	Enter full screen mode
	Exit full screen mode
	Display details
	Add note - adding a new note in the pop-up window will change the note icon green
	Send feedback - opens a pop-up window to enter and submit a feedback on the item

4. Refer to Knowledge Model and Diagnostic Troubleshooting Publications for more details on performing the troubleshooting steps.

Interactive Schematics

An interactive schematic is a diagram designed to assist users when troubleshooting.

To view and interact with diagrams

1. Schematics contents display as a list of cards or tiles on the left of the viewer with corresponding schematics on the right.

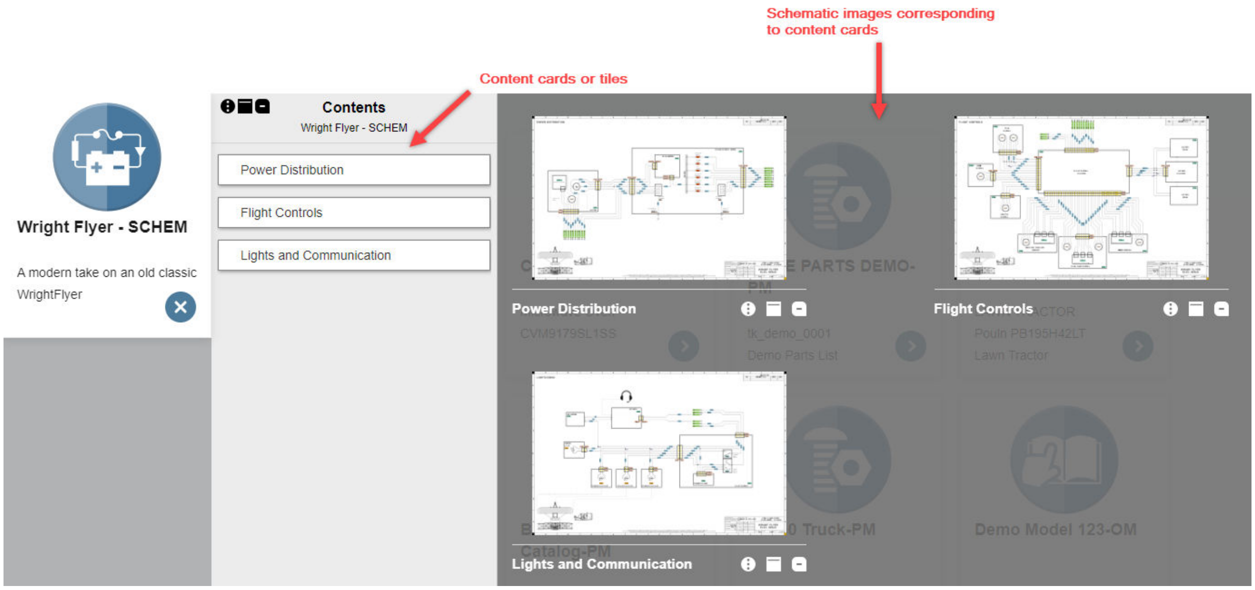


Figure 7-6. Schematics Viewer

2. Use the icon bar to the left of the contents list to perform different actions. There are additional icons for viewing details, adding notes, or sending feedback.

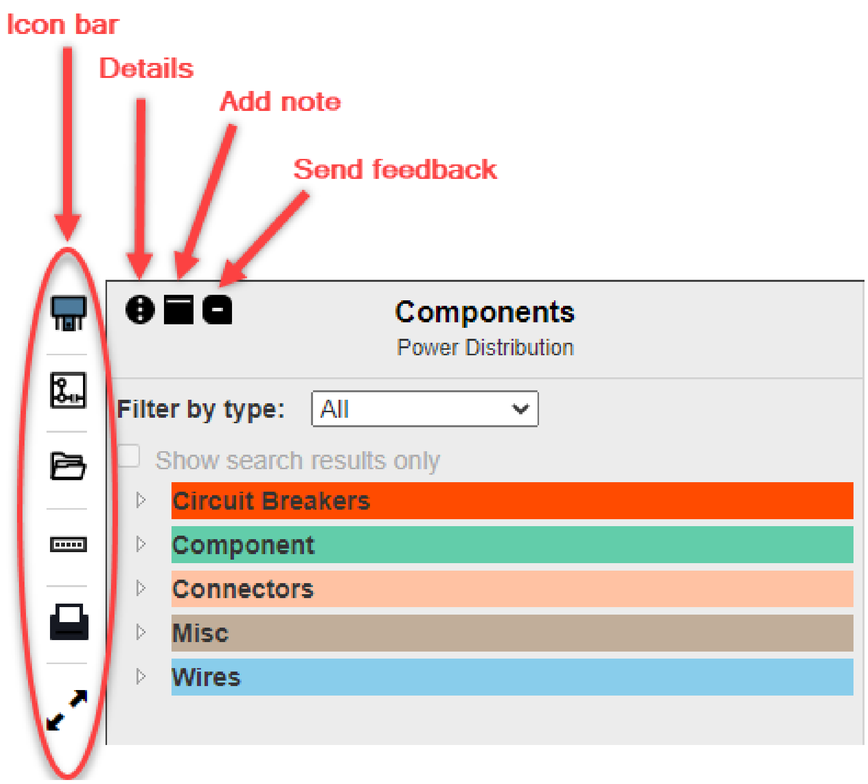
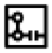


Figure 7-7. Schematics Viewer Icons

Table 7-4. Legend to Icons

Icon	Function
	Hides or displays components
	Hides or displays circuits
	Hides or displays the table of contents
	Hides or displays the toolbar
	Print
	Enter full screen mode
	Exit full screen mode
	Display details
	Add note - adding a new note in the pop-up window will change the note icon green
	Send feedback - opens a pop-up window to enter and submit a feedback on the item

3. Refer to How to View Interactive Schematics for more details.

Content Families and Sub-Types

When a product is selected, users will see the Product Details page, with the content grouped by content families, and then by sub-types within each content family. This makes it easier for users to find the source they're looking for, as they can select the sub-type with the content they want to search.

A user's customer configuration determines which content families and sub-types they will see. Below are examples of a product that has publications in multiple content families. The first content family listed is Parts and, as shown by the counter in the bubble to the left of the word Parts in the screenshots below, there is one associated parts publication.

There are up to nine different content families in the ONeSOURCE Client:

1. Training Publications
2. Operator & Maintenance Publications
3. Knowledge Model Publications
4. Service Manuals
5. Parts Publications

6. General Publications
7. Newsletters
8. Diagram/Schematic Publications
9. Videos (MP4s with maximum file size of 300MB)

NOTE: Depending on the customer configuration, users may have access to some or all of the content families listed above.

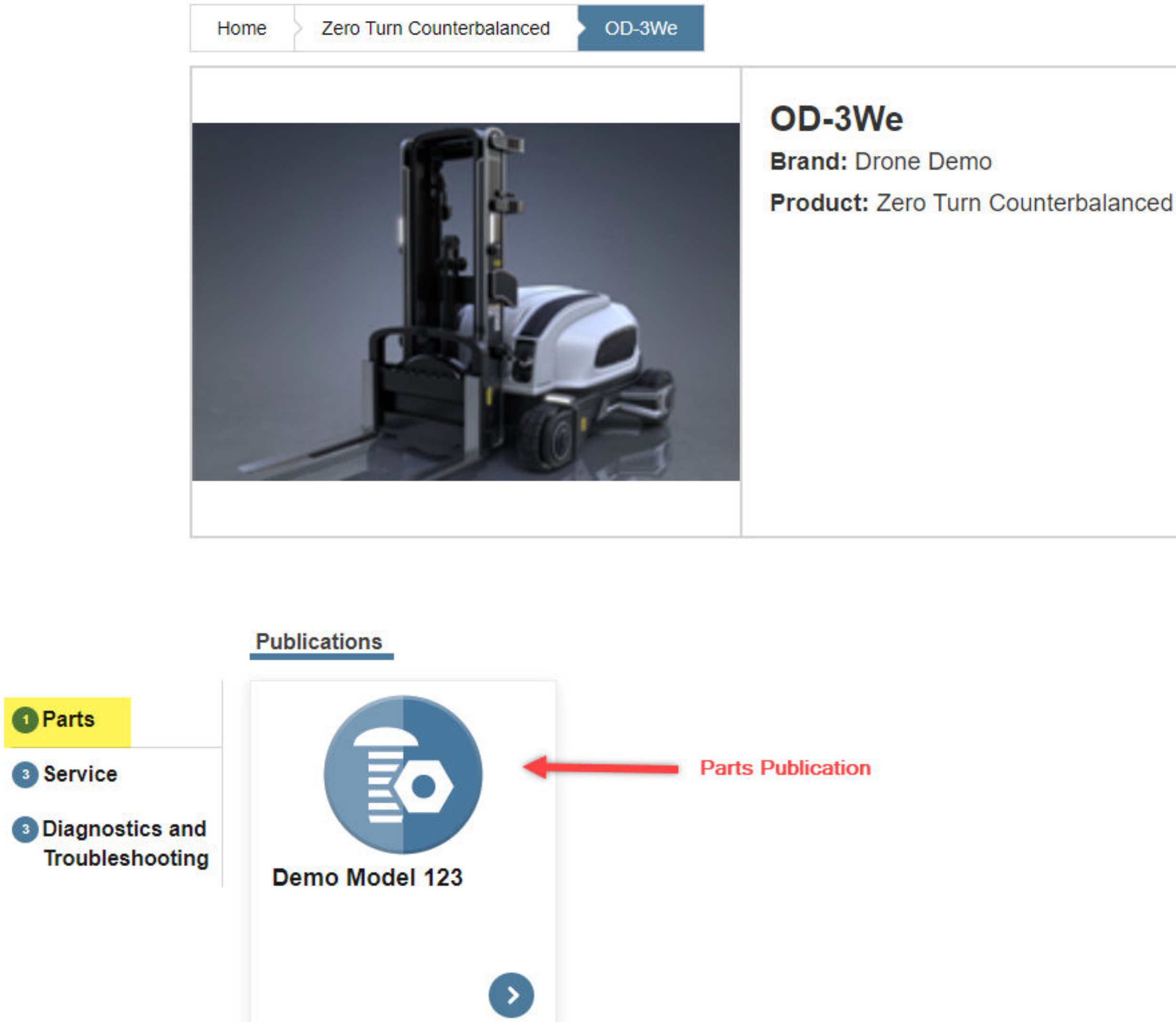


Figure 7-8. Product Details Page - Associated Parts Publications

Next, if we click on Service, we will see there are three associated publications.

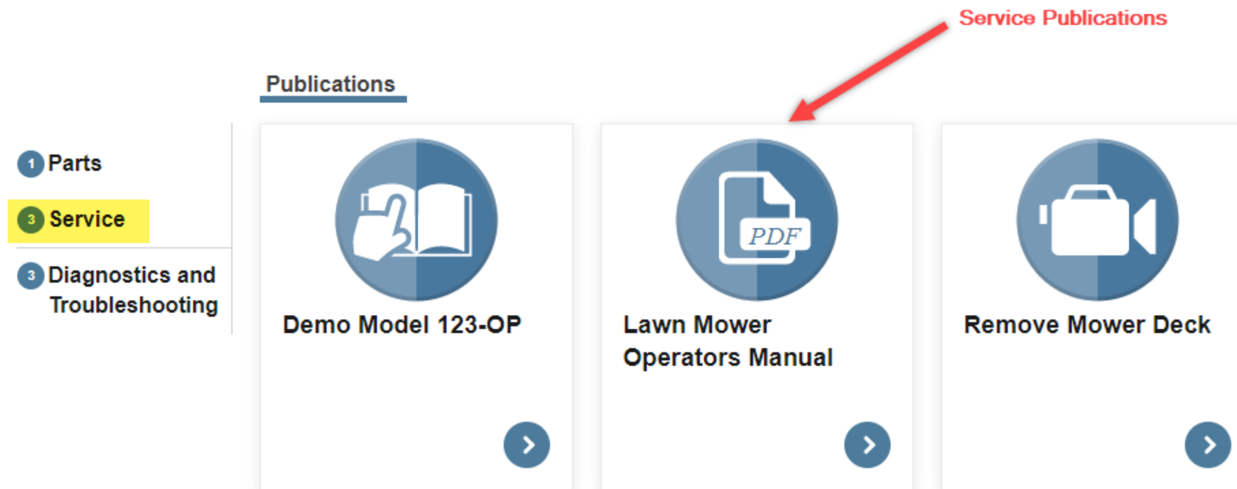


Figure 7-9. Product Details Page - Associated Service Publications

Lastly, if we click on Diagnostics and Troubleshooting, that are also three associated publications.

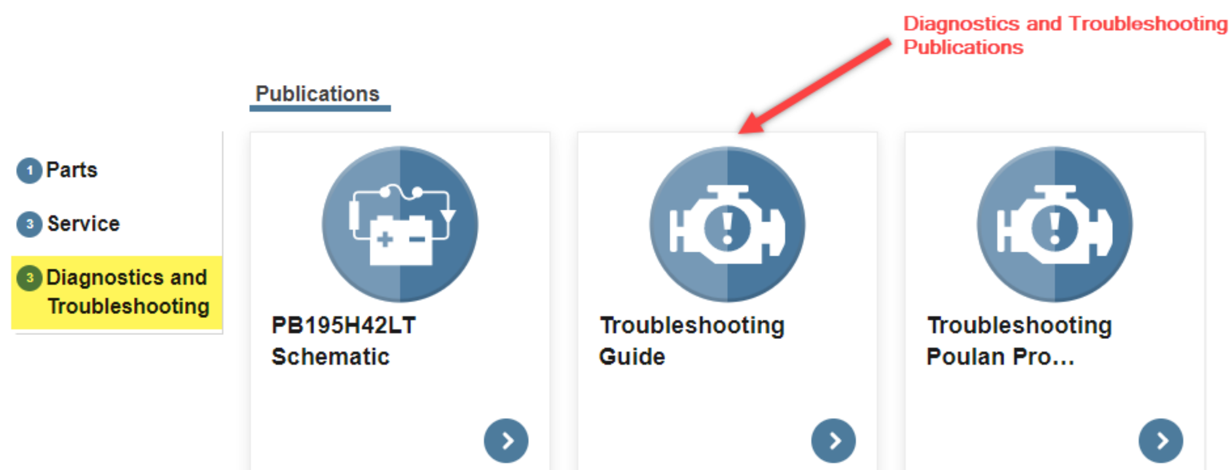


Figure 7-10. Product Details Page - Associated Troubleshooting Publications

Narrative Publications

Operating and Service Publications Viewer

More than other content types, operating and service publications use a variety of markup such as text, tables, lists, hypertext links, videos, and both embedded and stand-alone graphics. The user interface in the ONeSOURCE Client, however, looks very similar to the other content types.

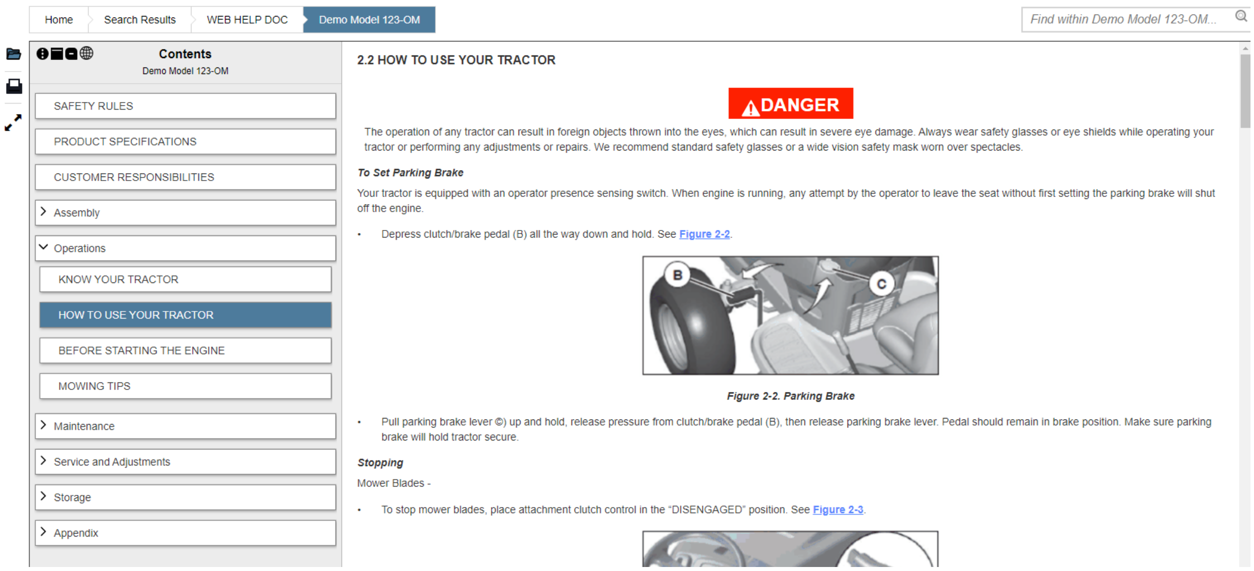


Figure 8-1. Operating Manual Viewer

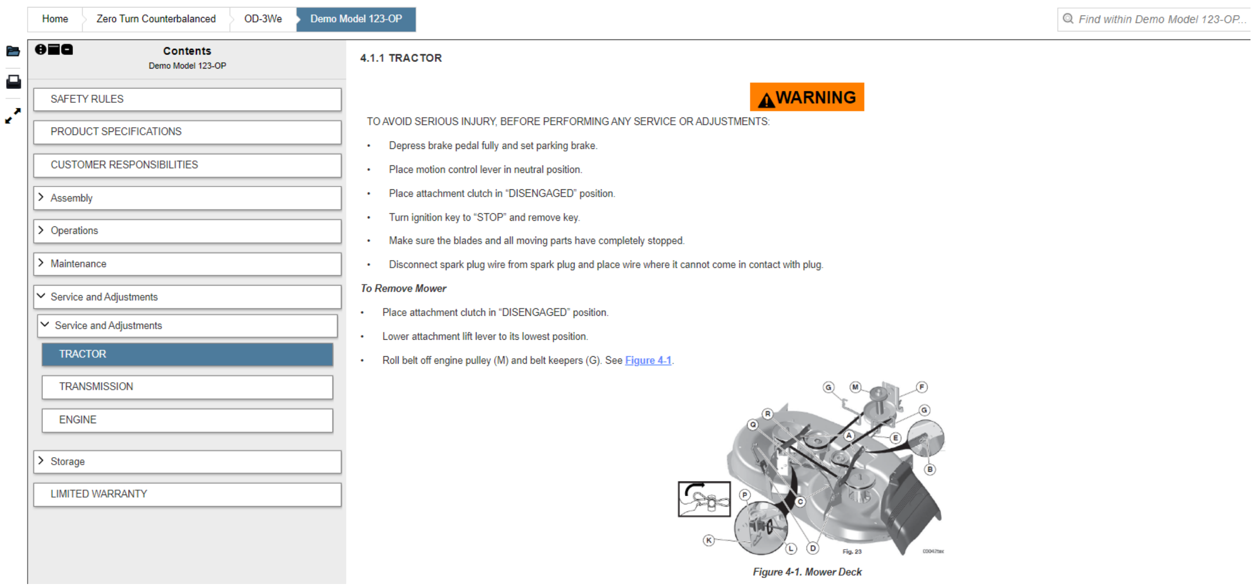


Figure 8-2. Service Manual Viewer

When an Operator or Service manual has been translated into languages other than English, the Select Language icon will display at the top of the list of contents.

1. Click the Language icon at the top of the list of Contents.

Figure 8-3. Language Icon

2. A pop-up window showing available languages for the content will open.

Figure 8-4. Available Translations Pop-Up

3. Select a language by clicking on it.

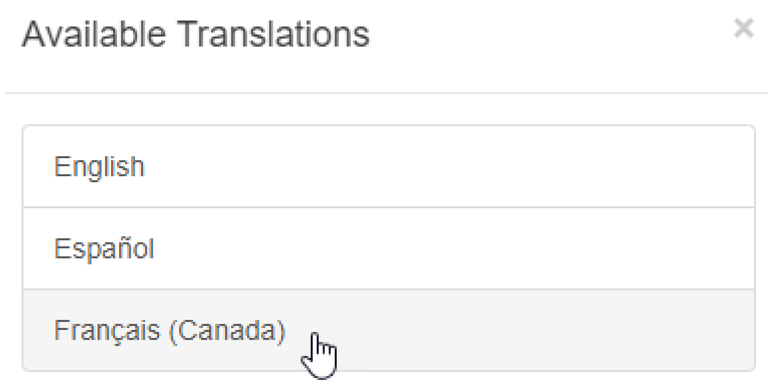
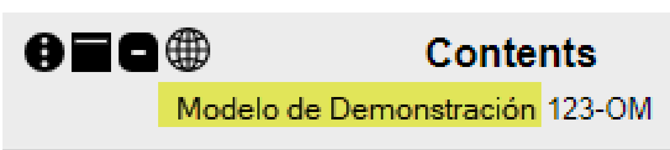


Figure 8-5. Select a Language

NOTE: Both the content and user interface will display in the selected language.



Printing Narrative Content

When printing content for a narrative publication, users will be prompted to print the currently selected module or the whole narrative publication. Narrative publications are publications that contain text (paragraphs), figures, lists, tables, etc. They are distinct from Parts publications. Service and Operating manuals are examples of narrative publications.

To Print Narrative Content

1. Select a narrative publication.
2. Click the Print icon from the left pane of the Narrative Publication viewer.

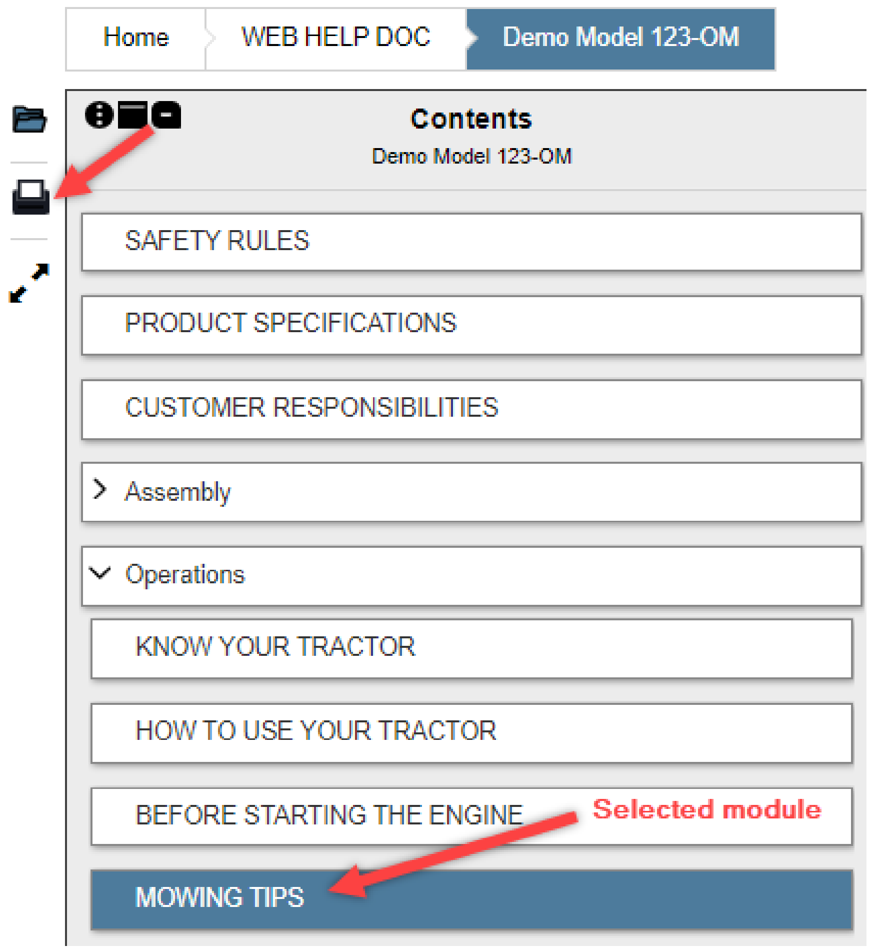


Figure 8-6. Print Icon

3. A Print Narrative Content pop-up window will open.

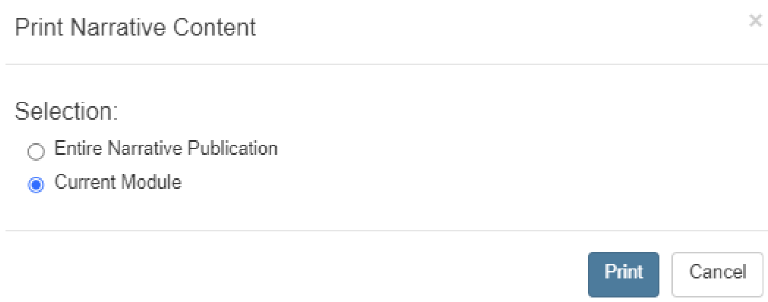


Figure 8-7. Print Narrative Content Pop-Up

4. Check the appropriate radio button for the desired print job. Selecting the current module will only print the module displayed in the viewer (e.g., "Mowing Tips" in the example above).
5. Click the Print button.
6. A print dialogue window will open to review printer properties and change selections.
7. Click the Print button to print the selection.

Parts Viewer

Parts Viewer

The Parts viewer displays parts lists interactively allowing users to select either line items or hotspots to quickly locate about information about the part.

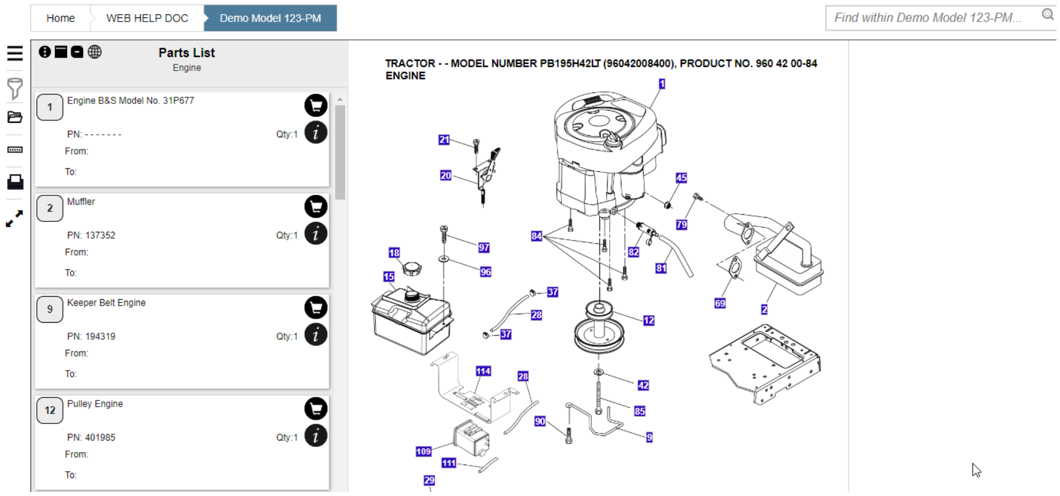


Figure 9-1. Sample Parts List

When a Parts manual has been translated into languages other than English, the Select Language icon will display at the top of the list of contents next to the Send Feedback icon.

1. Click the Language icon at the top of the list of Contents.

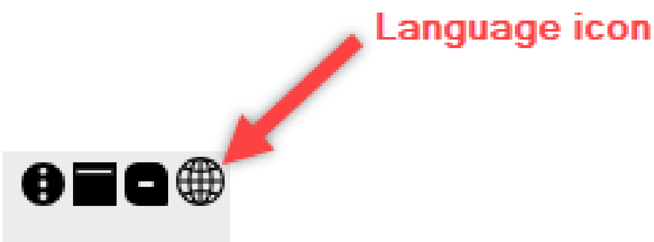


Figure 9-2. Language Icon

2. A pop-up window showing available languages for the content will open.

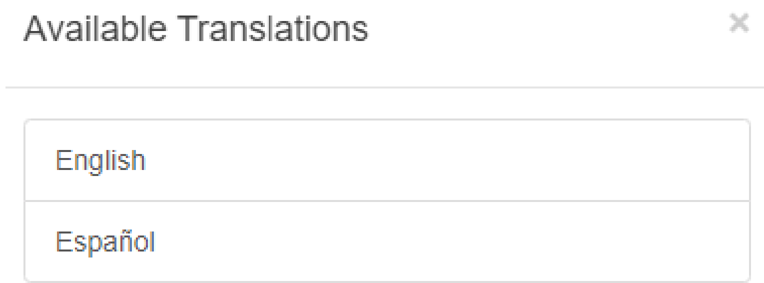


Figure 9-3. Available Translations Pop-Up

3. Select a language by clicking on it.

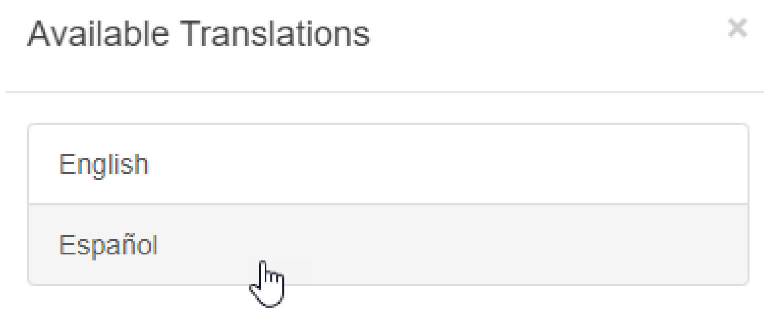
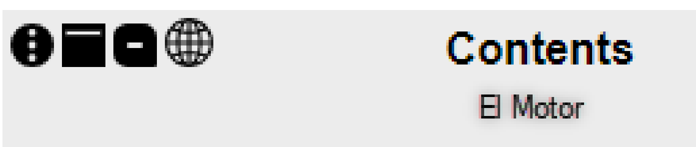


Figure 9-4. Select a Language

NOTE: Both the content and portions of the user interface will display in the selected language.



Line Items

Line items are the items that comprise a parts list. They usually correspond to hot spots in the parts illustration, although this may not always be the case. Clicking on a line item will highlight the corresponding hot spot in the parts illustration, when a matching hot spot exists. Clicking on the information icon associated to the line item will open the line item flyout box.

1. Open a parts list.

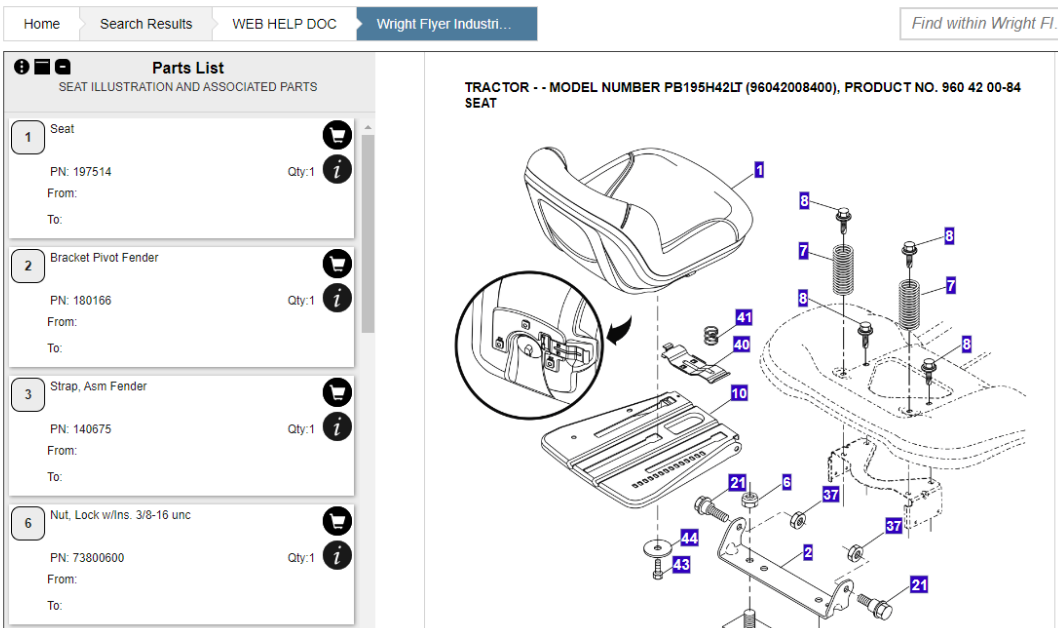


Figure 9-5. Sample Parts List

NOTE: Parts line items should display on the left of the viewer and the parts illustration should display on the right.

2. Click a line item in the parts list.

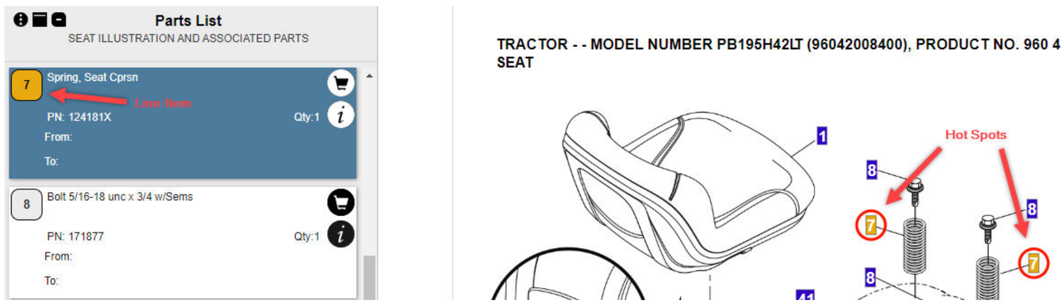


Figure 9-6. Sample Line Item

NOTE: The line item and corresponding hot spot(s), when one exists, will be highlighted. Clicking on a line item associated to more than one hot spot (e.g., when there is more than one hot spot with the same label/number) will highlight all of the hot spots in the parts illustration.

NOTE: The From and To in the above example are configurable and can be turned on or off based on what the customer wants to see in the line item.

3. Refer to Using Parts Line Item Flyouts for details on using line item flyouts.

Using Parts Line Item Flyouts

1. Individual line items in a parts list display an info icon that, when clicked, opens a flyout displaying additional information for the selected part. Users can view details, enter a note, send feedback, and view an image of the part, if available.

Figure 9-7. Information Icon

2. Details about the part are displayed by default.

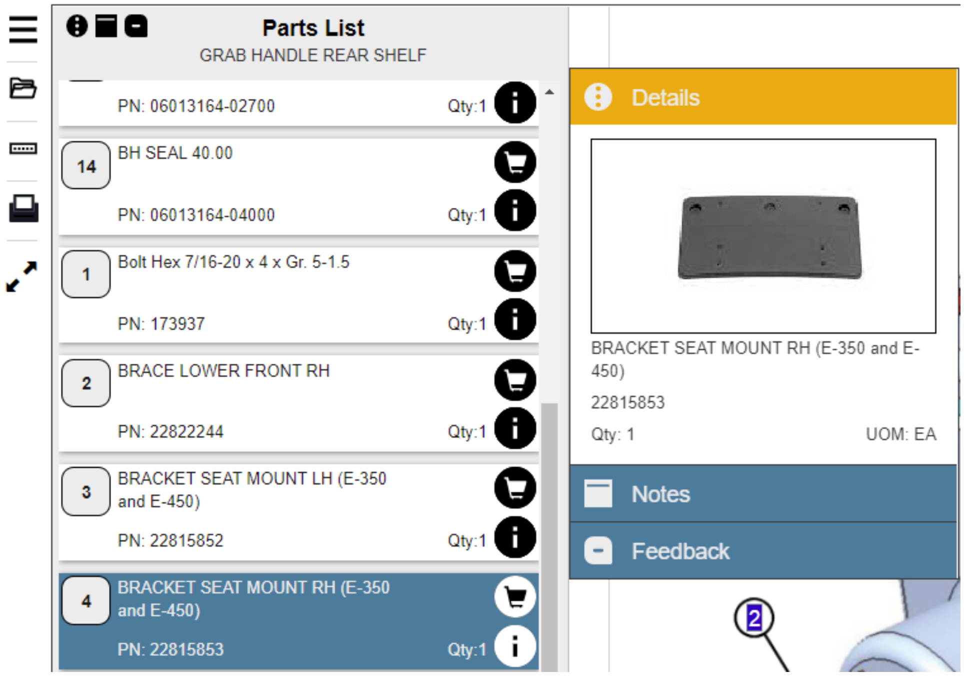


Figure 9-8. Parts Line Item Flyout

If the customer's ONeSOURCE Client application is so configured and the information is available, a line item can display extended applicabilities. In this example, Fuel Type information is displayed.

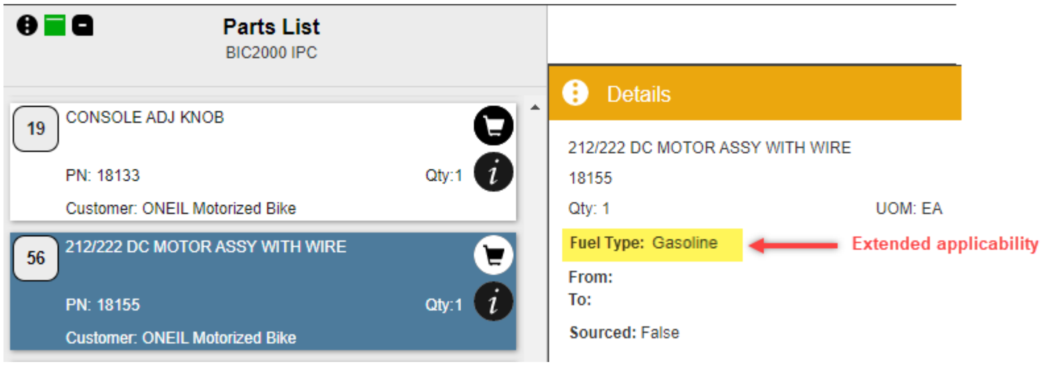


Figure 9-9. Extended Applicability

NOTE: The extended applicability displayed is specific to the customer's configuration.

Additionally, a line item can display an effective date or a serial number range for the selected part.

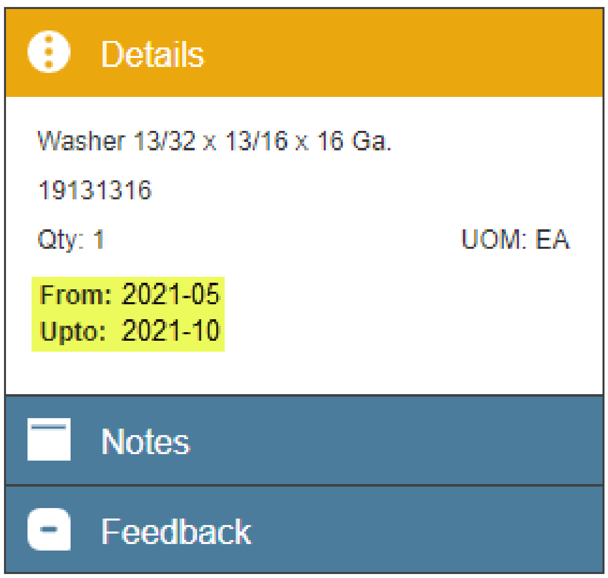


Figure 9-10. Parts Line Item - Details

NOTE: The example above shows the part's effective from and to dates.

Viewing Parts Images in Line Item Flyout

When an image of the part is available, it will display in the Details portion of the Line Item Flyout. When more than one image is available, users can scroll through the images by using the navigation arrows displayed over the images or by clicking on the bubbles that display below the images.

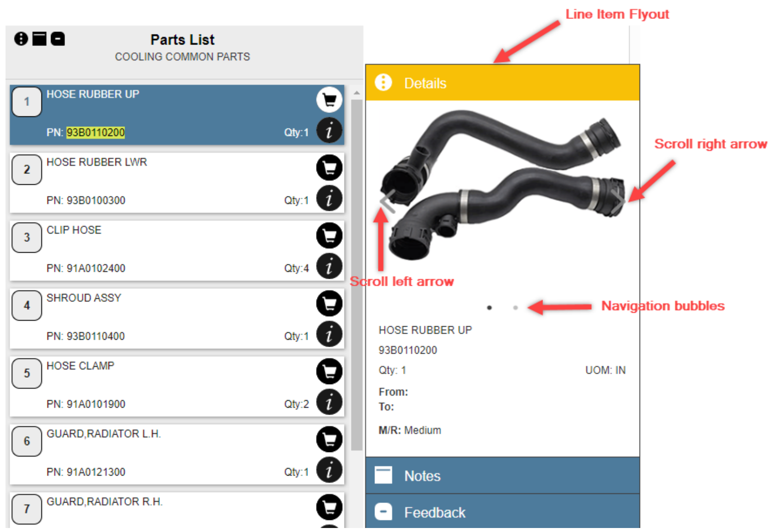


Figure 9-11. Line Item Flyout - Parts Image 1 of 2

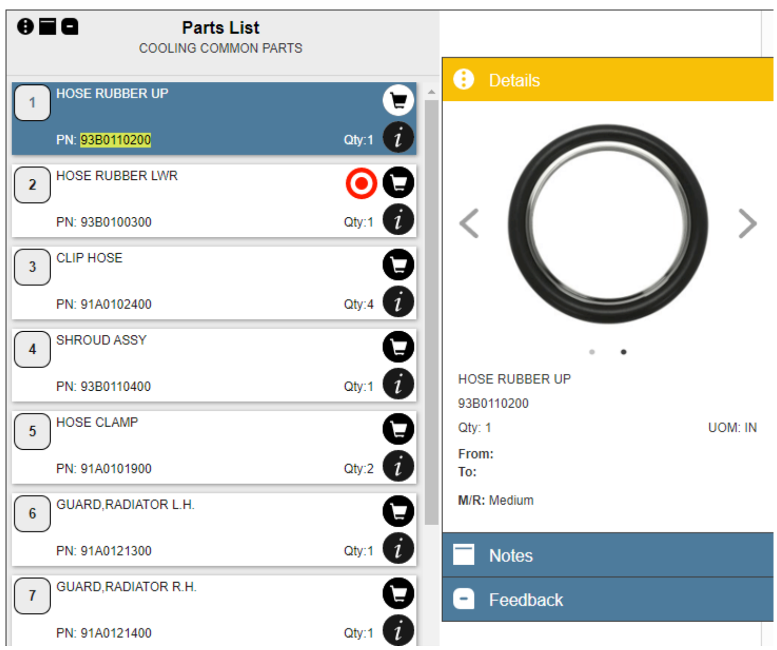


Figure 9-12. Line Item Flyout - Parts Image 2 of 2

To view an enlarged image of the part, click on the image in the Line Item Flyout. Use the navigation arrows or bubbles to scroll to other images, if present. Click on a portion of the screen away from the image to close the enlarged image view.

Figure 9-13. Enlarged Parts Image

3. Content authors may add a note to the line item (master part) in the Content Management System (CMS) which will show up in the Details section of the Line Item Flyout.

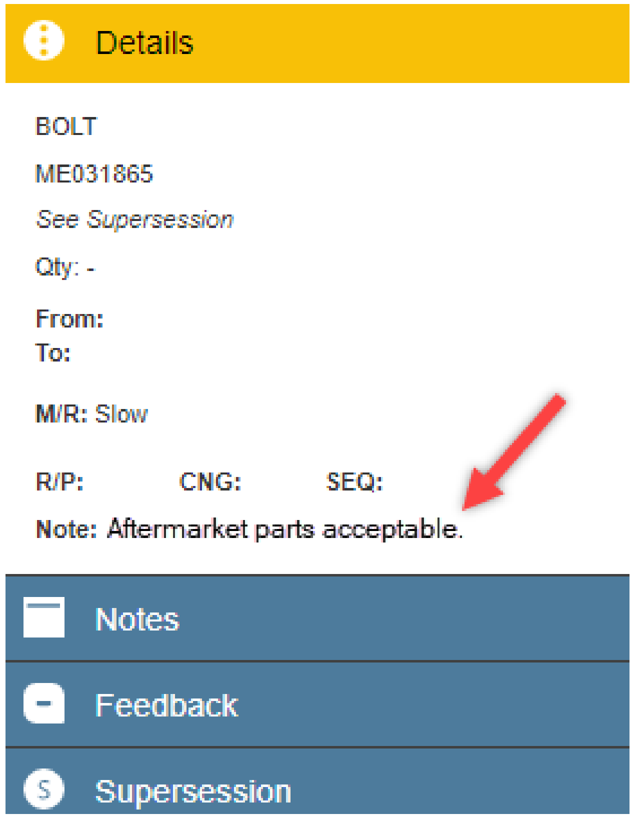


Figure 9-14. Note Added to Details in Line Item Flyout

NOTE: If the note is lengthy, an ellipsis will follow the note text that is visible. Users can read the full text of the note by hovering the mouse over the text.

4. Clicking on the other options in the Line Item Flyout (Notes or Feedback) will collapse the Details section and open the selected section. From here, users can view an existing note or add a new note or feedback.

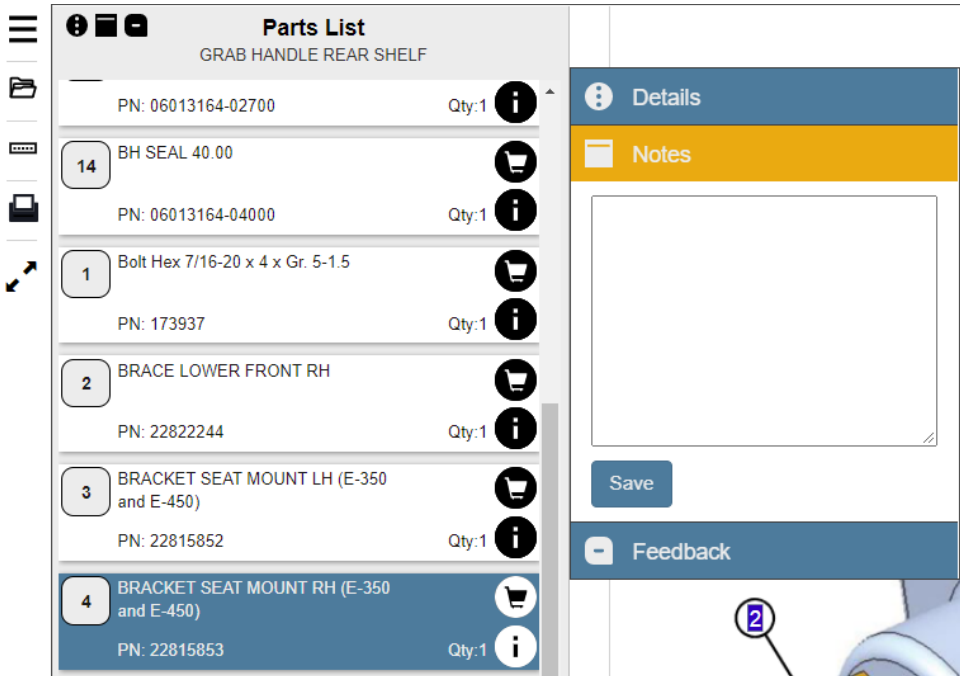


Figure 9-15. Parts Line Item - Notes

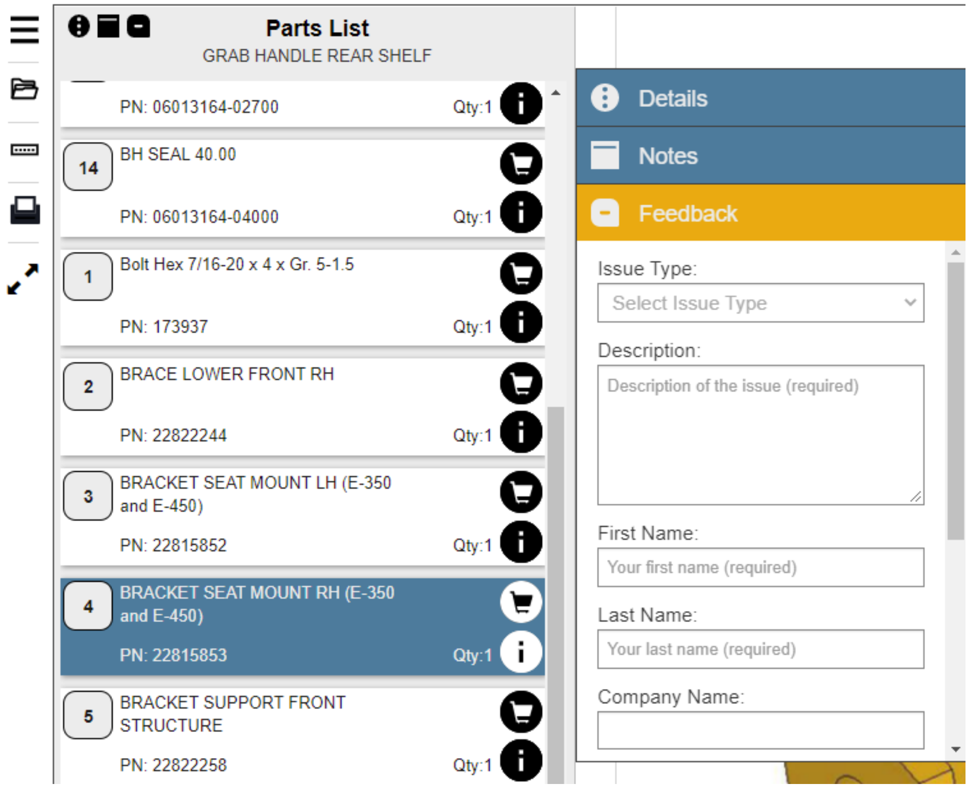


Figure 9-16. Parts Line Item - Feedback

Link to Part Details Page from Line Item Description

When parts search is enabled, line item descriptions are linked and will take users to the Part Details page for the specific part. The Part Details page typically provides more information about the part than what is available in the parts list.

1. Select a parts publication.
2. Click on a contents card or graphic.

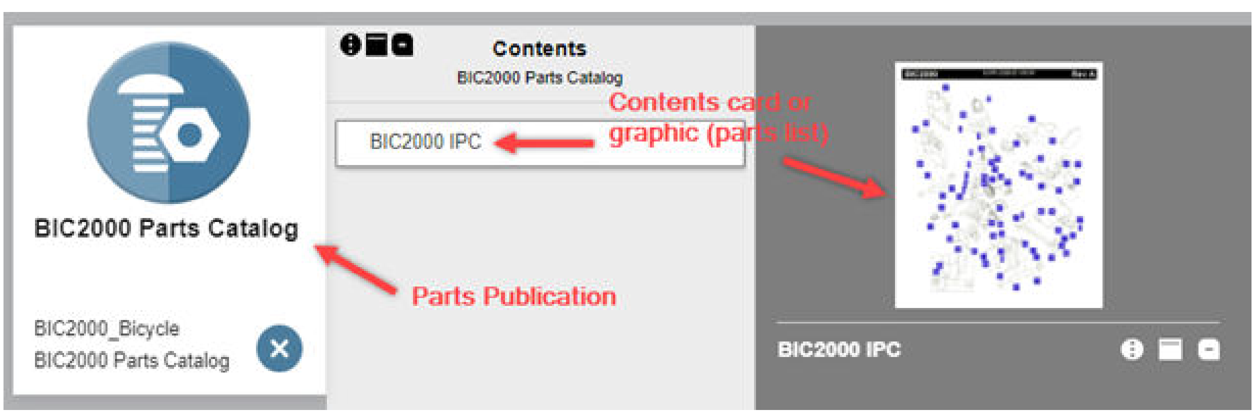


Figure 9-17. Parts Publication

3. The parts list will open displaying the line items and parts illustration.

4. If parts search is enabled for the customer configuration, line item descriptions will display a link when the user moves the mouse over it.

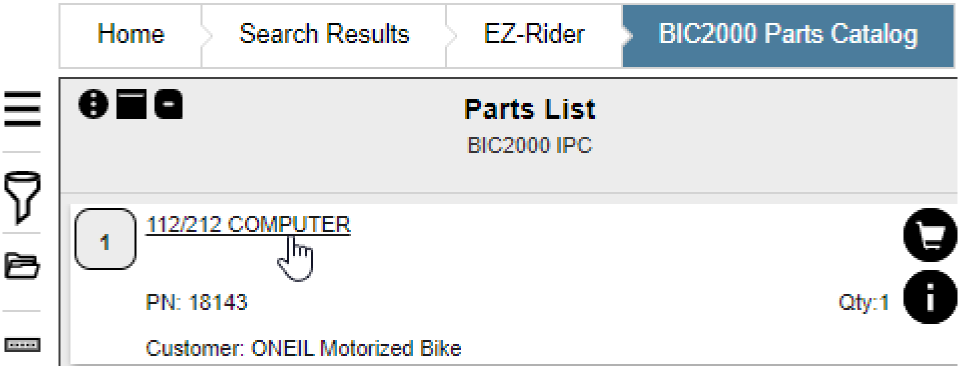


Figure 9-18. Linked Line Items

5. Click on the link in the line item description to go to the Part Details page.

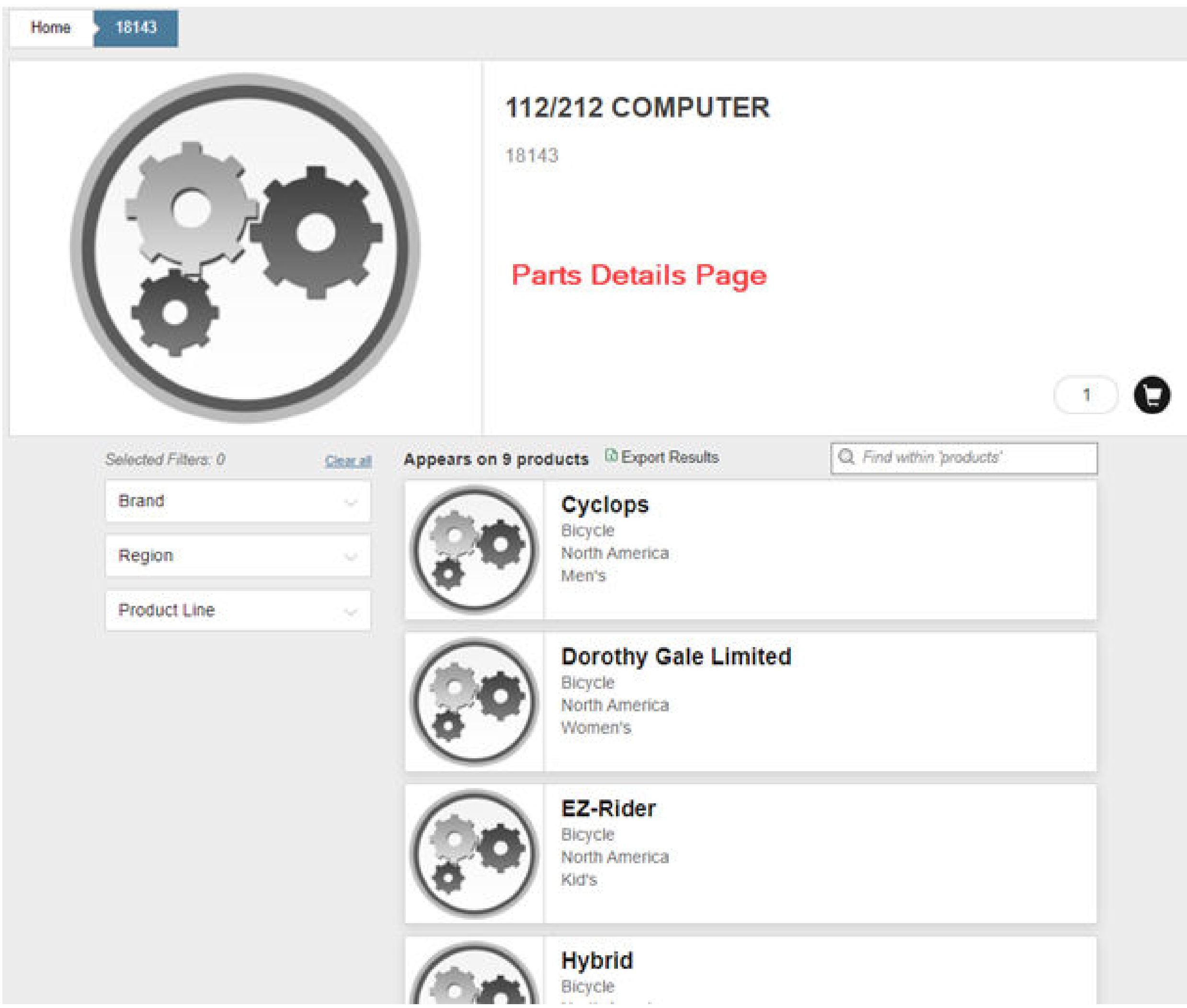


Figure 9-19. Parts Details Page

6. Click the back button in the browser to return to the parts list.

Attachment Icons

Depending on your customer configuration, it is possible to have attachments for master parts that users can open for supplemental information about the specific master part.

When an attachment is present, an icon will display beside the cart icon. The design of this icon may vary for different customer configurations.

Below is an example of a master part with an attached PDF bulletin.

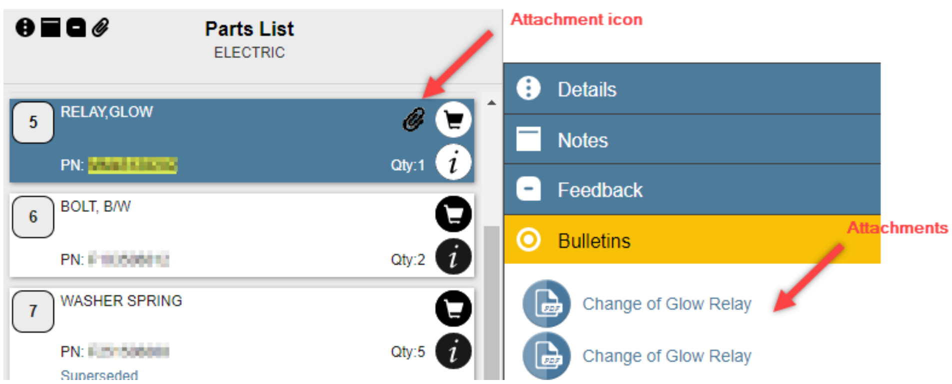


Figure 9-20. Master Part Attachment

In addition to icons for individual attachments, there will also be a paper clip icon to display a list of all attachments associated to a parts list. It displays to the right of the feedback icon at the top of the parts list.

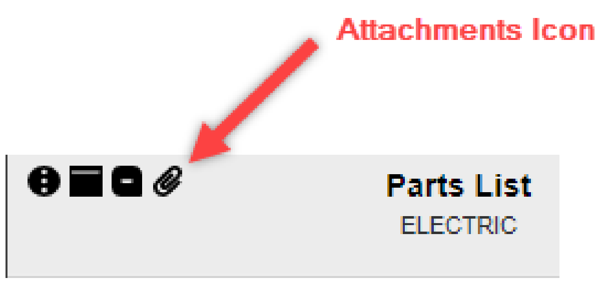


Figure 9-21. Attachments Icon

Click on this icon to display the full list of associated attachments sorted by line item.

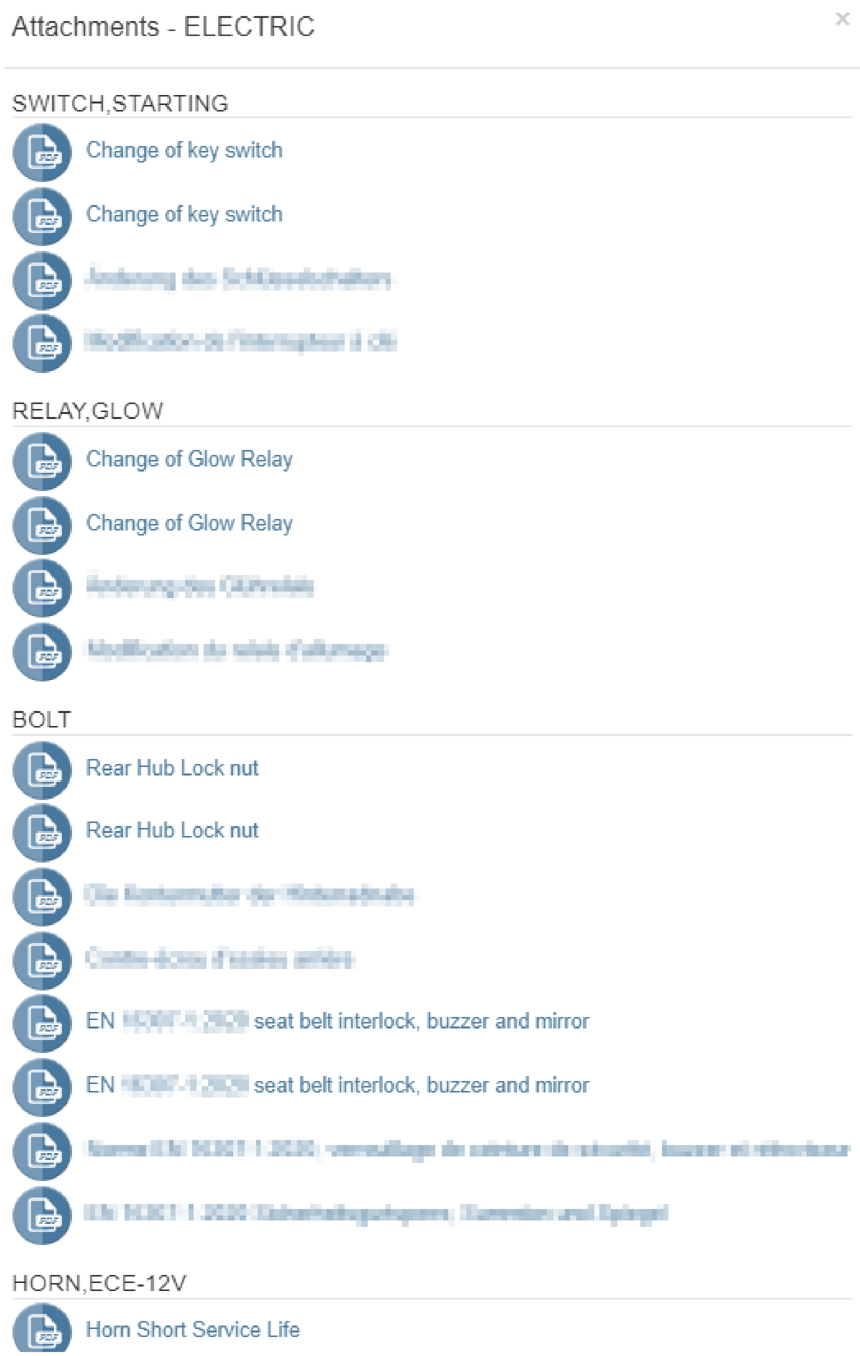


Figure 9-22. List of All Attachments

Hotspots

Hotspots, also referred to as callouts, are labels assigned to items in a parts illustration. Clicking on a hotspot will highlight the corresponding line item number in the parts list. Also, when the parts line items are hidden, clicking on a hotspot will display the hotspot flyout box.

1. Open a parts list.

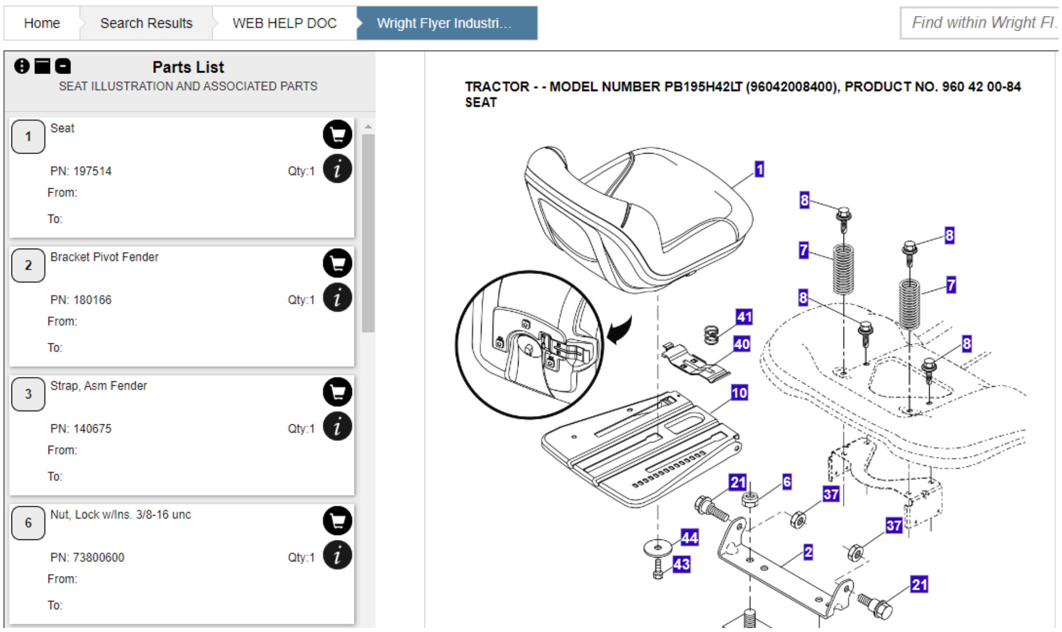


Figure 9-23. Sample Parts List

NOTE: Parts line items should display on the left of the viewer and the parts illustration should display on the right.

2. Click on a hotspot displayed in the parts illustration.

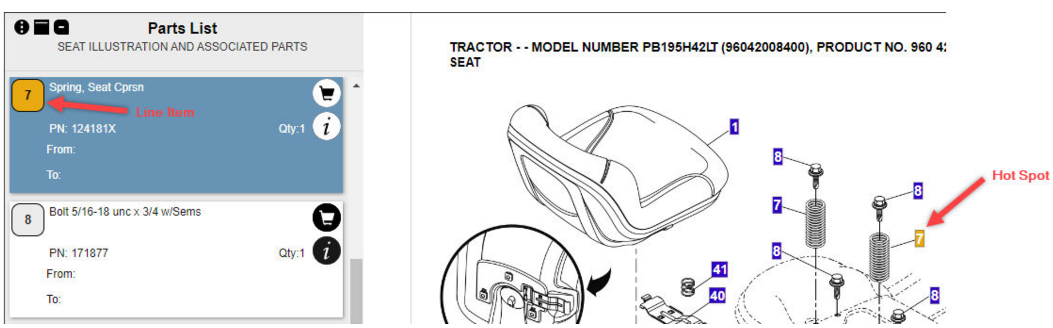


Figure 9-24. Sample Hot Spot

NOTE: The hot spot and corresponding line item will be highlighted.

3. Clicking a hotspot that is associated to more than one line item (e.g., when there are two line items with the same label/number) will highlight all of the associated line items in the parts list.

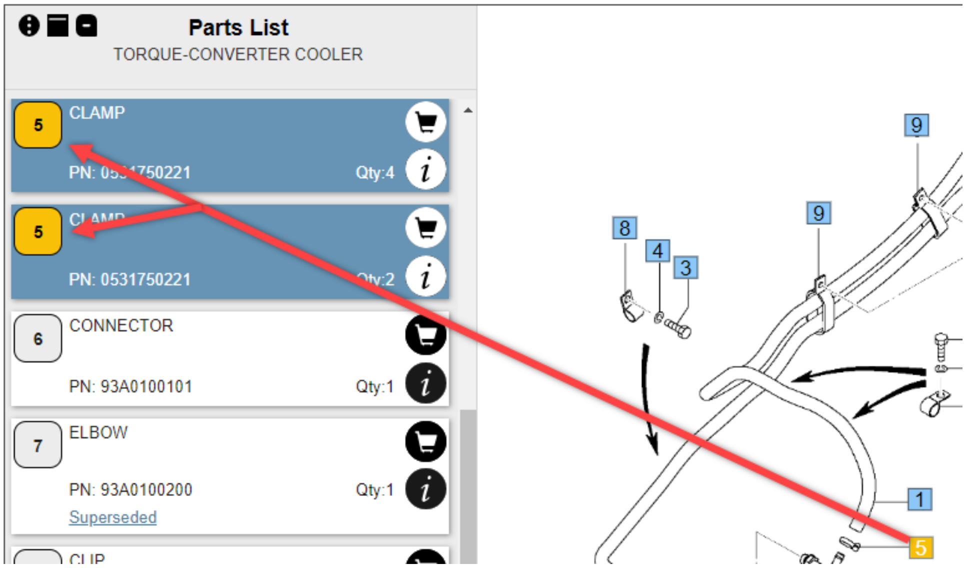


Figure 9-25. Hotspot Associated to Multiple Line Items

4. Refer to Using Hotspot Flyouts for details on using hot spot flyouts.

Using Hotspot Flyouts

Users can view part meta data, shopping cart icon, and an image of the part (if available) when selecting an interactive hotspot on a parts diagram when the list of line items is collapsed.

To view hotspot flyouts:

1. Open a parts list.
2. Collapse the line items by clicking the parts list icon.

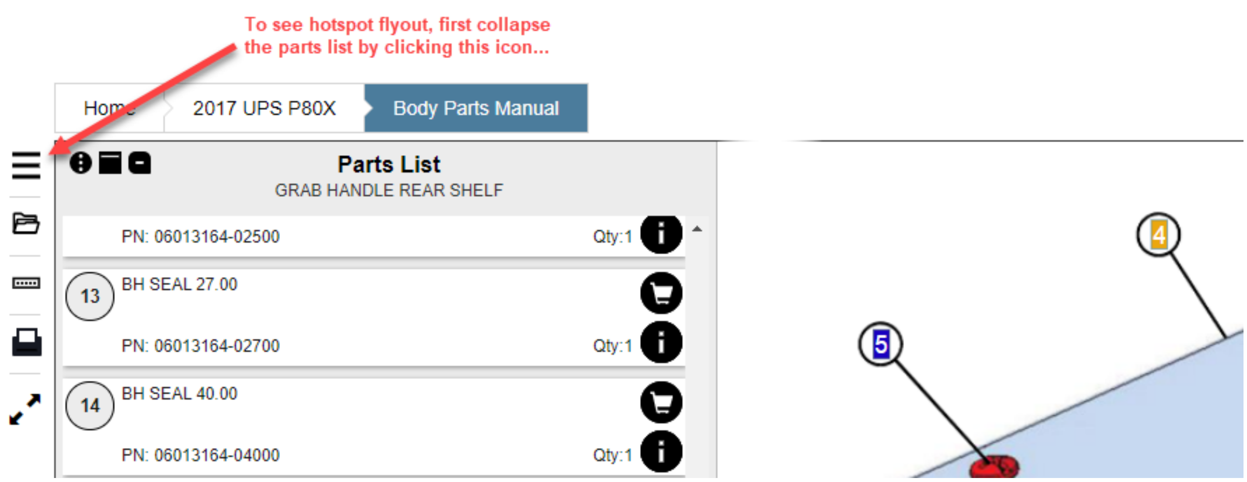


Figure 9-26. Parts List Icon

3. Click on a hotspot to display the flyout.

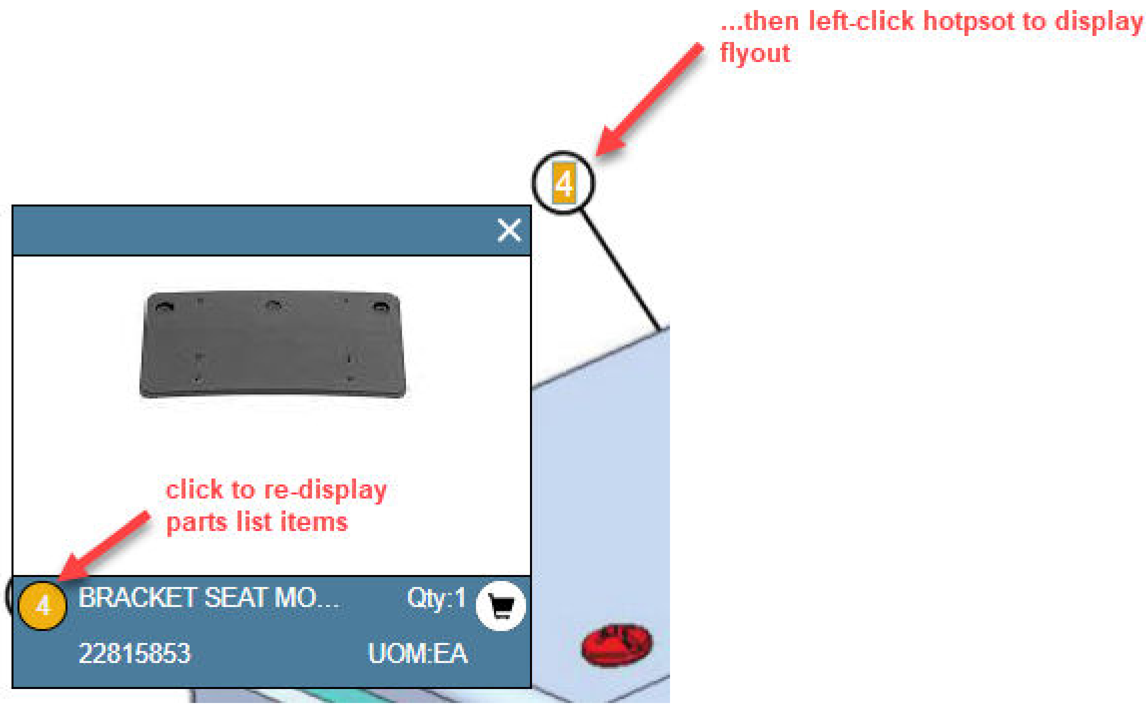


Figure 9-27. Hotspot Flyout

4. When an image of the part is available, it will display in the Hot Spot Flyout. When more than one image is available, users can scroll through the images by using the navigation arrows displayed over the images, or by clicking on the bubbles that display below the images.

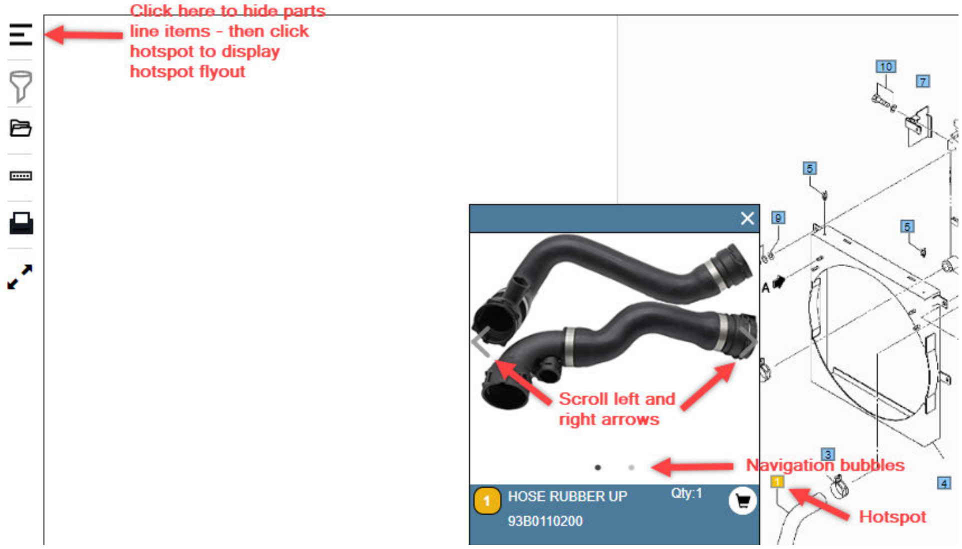


Figure 9-28. Hotspot Image 1 of 2

5. To display the parts list items, click the parts list icon or the line item hotspot displayed in the flyout.

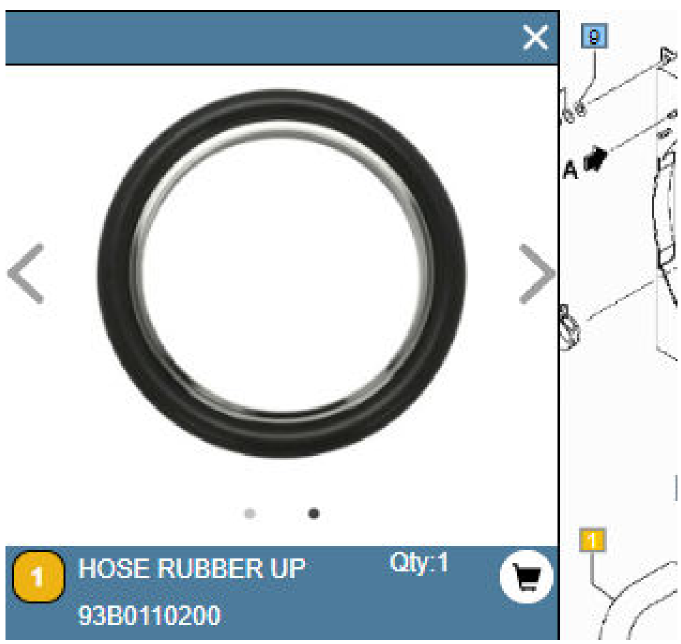


Figure 9-29. Hotspot Image 2 of 2

6. To view an enlarged image of the part, click on the image in the hotspot flyout. Use the navigation arrows or bubbles to scroll to other images, if present. Click on a portion of the screen away from the image to close the enlarged image view.

Figure 9-30. Enlarged Parts Image

Viewing Front Matter

When there is front matter associated with a parts publication, users will be able to view it in the Parts Viewer along with the parts list(s). Front matter is content, usually in narrative format (paragraphs of text, tables, lists, figures, etc.), that is related to the parts list(s) that follow.

1. *To View Parts List Front Matter*
   Select a parts list publication that has front matter. The TOC overlay will display. Click on a section in the TOC to open the parts list in the Parts Viewer.

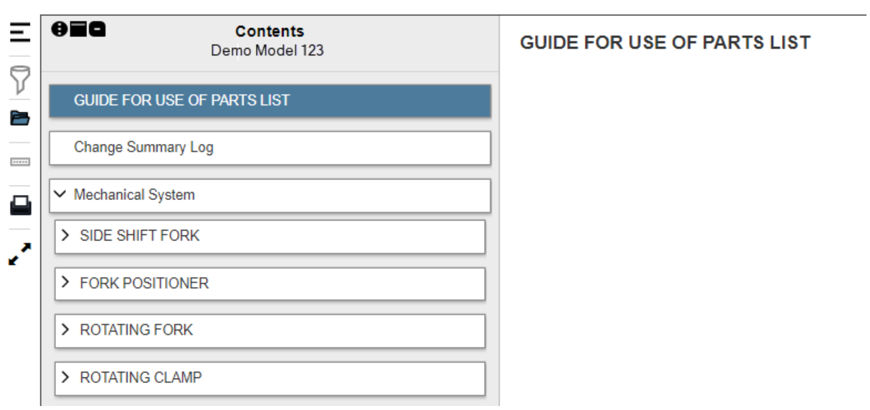


Figure 9-31. Parts Viewer

NOTE: The Guide and Change Summary Log is front matter associated to the parts publication.

2. The parts lists start with the Mechanical System section.
3. Click on the Contents icon (shown highlighted in blue above) to toggle the TOC on or off.

Viewing Nested Parts Lists

A nested parts lists, or sub-assemblies, can appear within the main parts list. These nested lists, in turn, can also have parts lists nested within them.

1. The presence of a nested parts list is indicated by a plus sign on the line item.

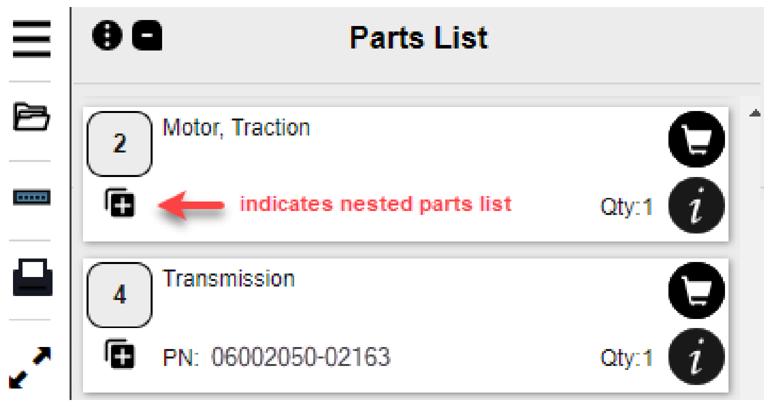


Figure 9-32. Nested Parts List Indicator

2. Click the plus sign to expand the nested parts list.

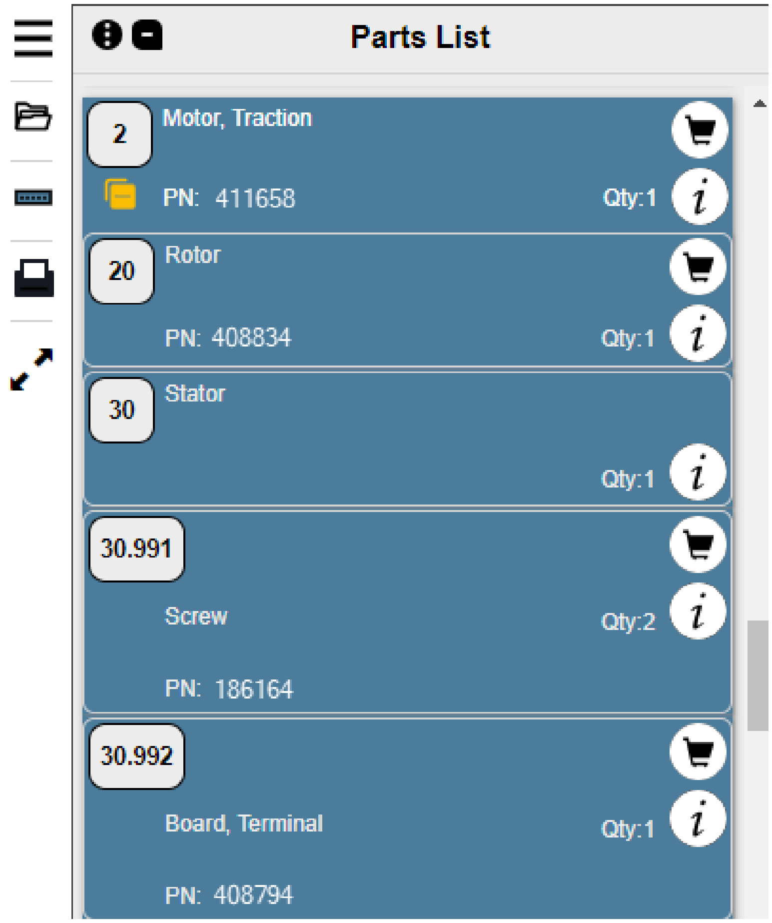


Figure 9-33. Expanded Nested Parts List

NOTE: The parent and children line items of the nested parts list are highlighted as shown when the nested parts list is expanded. The highlight color is configurable and will vary by customer.

3. When expanded, the plus sign changes to a horizontal dash.
4. To collapse a nested parts list, click the horizontal dash.
5. When collapsed, the horizontal dash changes back to a plus sign.

Levels of Nesting

1. Here is an example of a parts list that contains a nested parts list within a nested parts list.

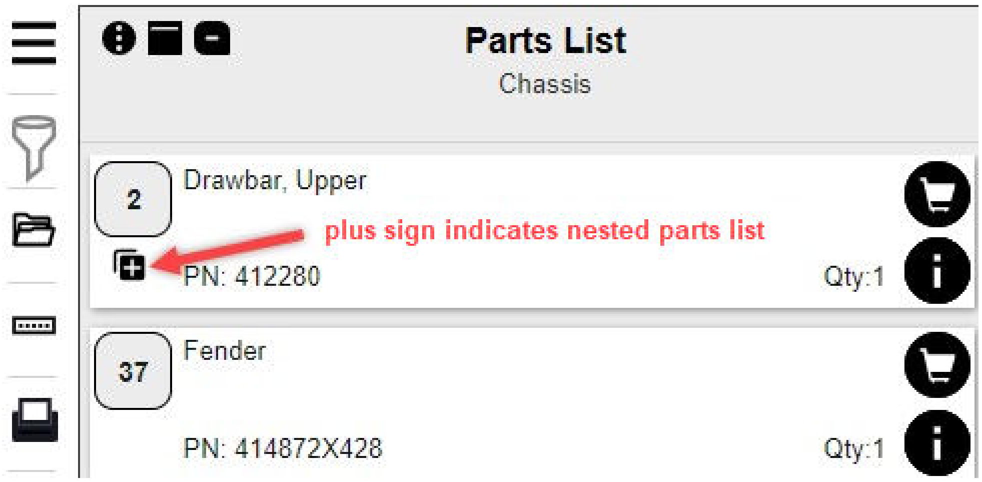


Figure 9-34. First Nested Parts List Plus Sign

2. Click on the plus sign to expand the nested parts list.

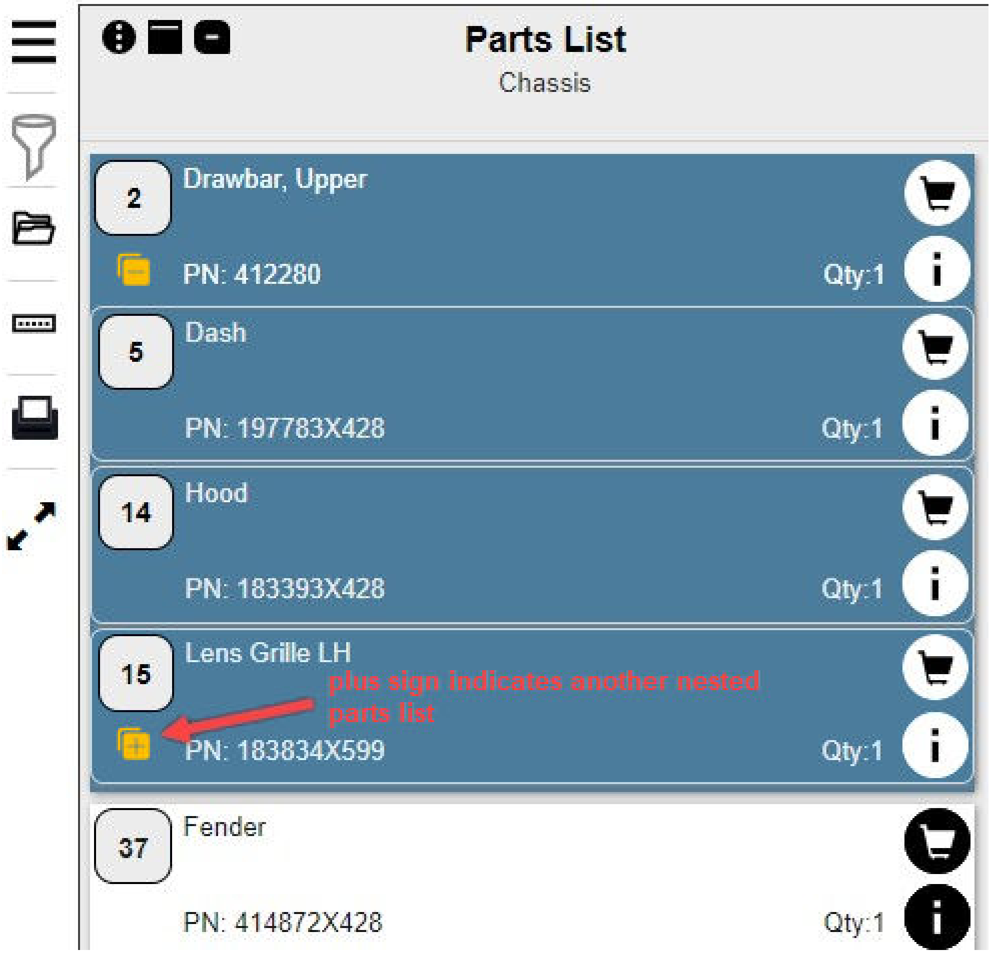


Figure 9-35. Second Nested Parts List Plus Sign

3. Click on the plus sign to expand the nested parts list.

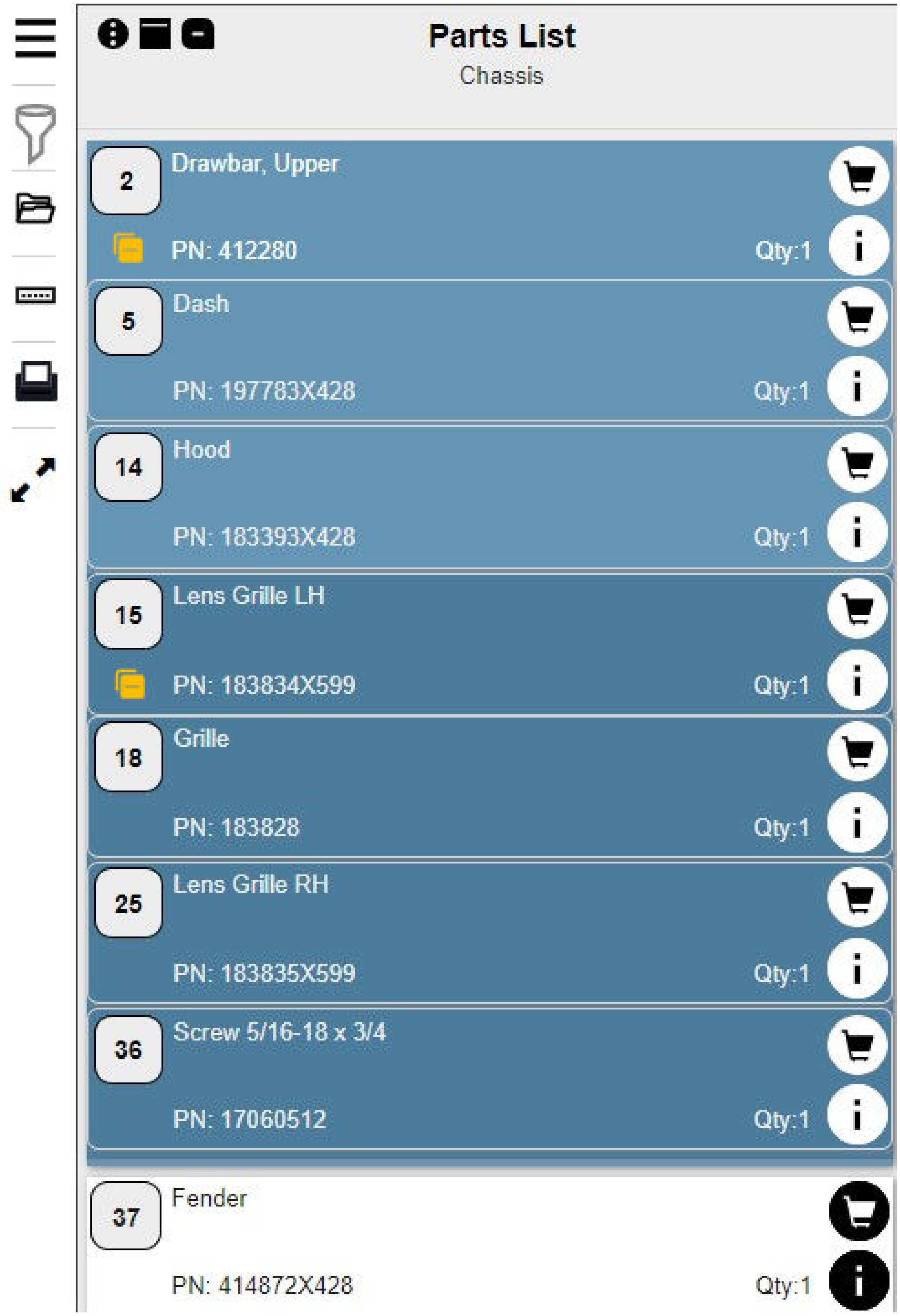


Figure 9-36. Second Nested Parts List Expanded

NOTE:

a. The highlighting of the parent line item and children line items from the previous nested parts list is lighter than it was originally, and the highlighting of the parent line item and children line items of the currently expanded nested part list is darker.

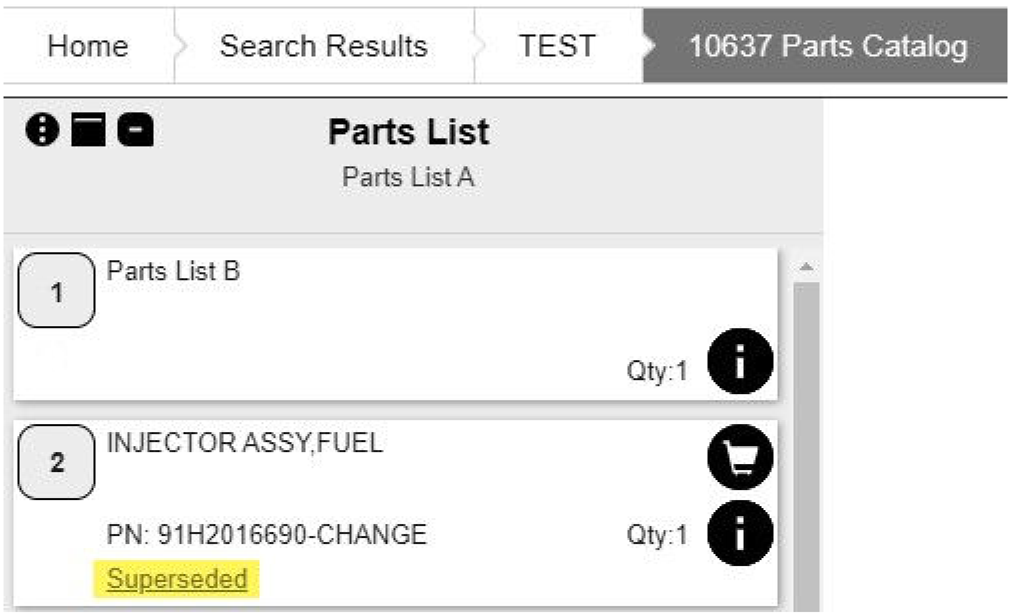
b. Subsequent levels of nested parts lists will follow the same pattern, with the last opened level of nested line items showing the darker highlighting and previous levels having the lighter highlighting.

c. The color used for highlighting the different levels of nested parts list items is set by the customer's configuration.

Viewing Supersession Information

Superseded parts are easy to overlook in a parts list. If the superseded part number is known, the Find within.... search feature can be helpful in making them easier to find.

1. Select and open a parts publication.



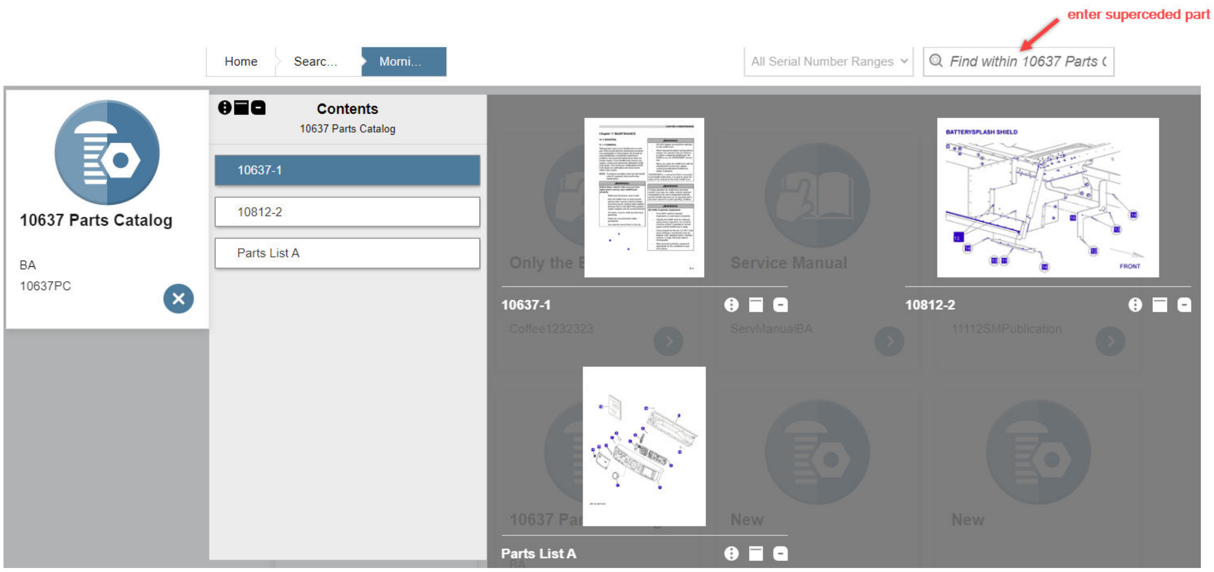


Figure 9-37. Parts Publication

2. Enter a part number that has been superseded into the **Find within** search window and press **Enter**.

Figure 9-38. Superseded Part Number

3. The parts lists that contain the superseded part number will be highlighted.

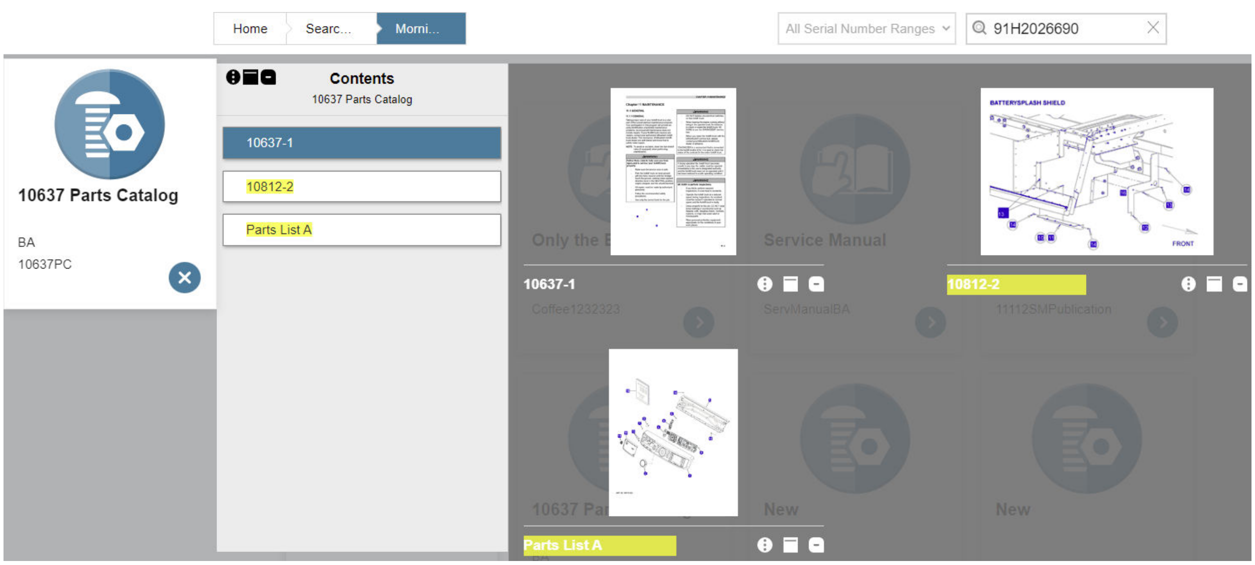


Figure 9-39. Parts Lists That Contain Superseded Part(s)

4. Select one of the highlighted parts lists.

5. The parts list will open and the line item with the superseded part will be highlighted.

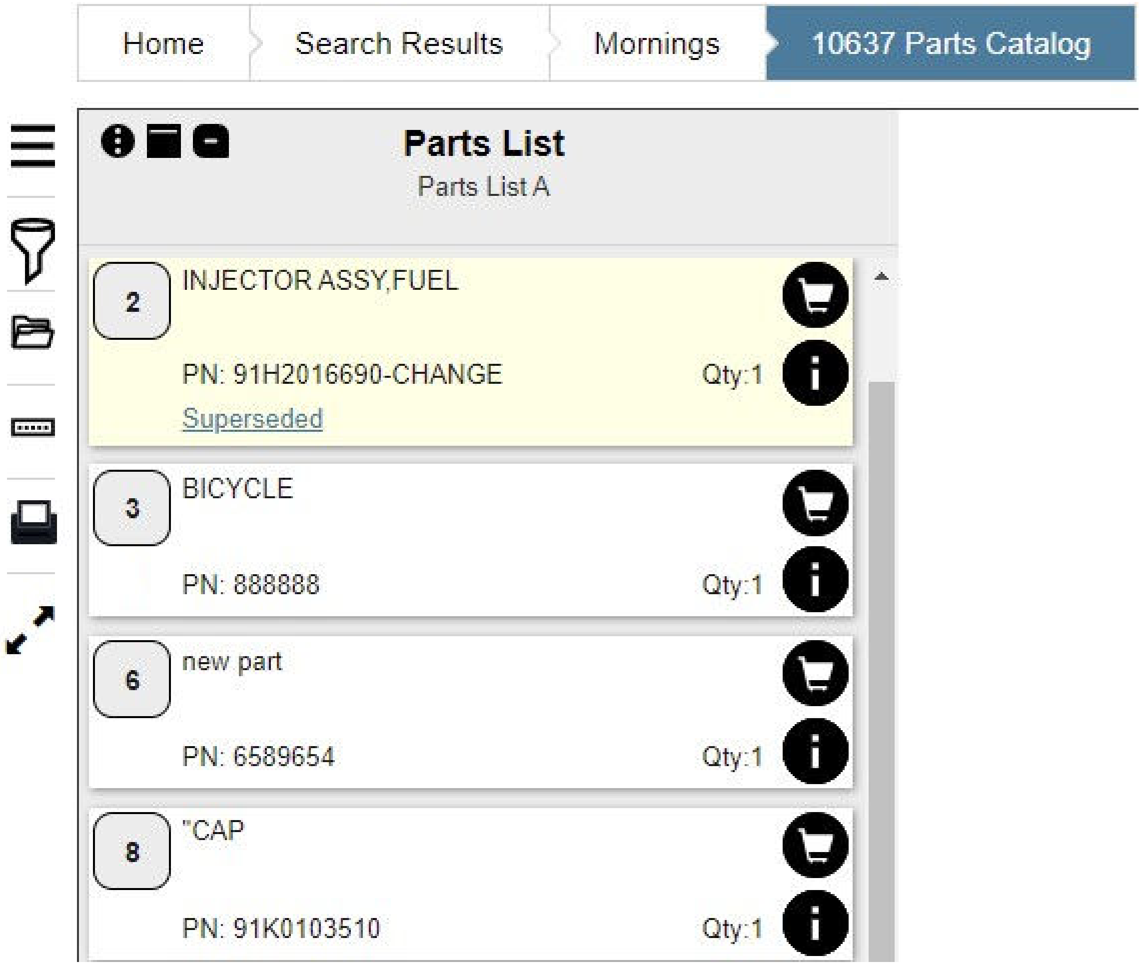


Figure 9-40. Parts List with Superseded Part Highlighted

6. Click the **Superseded** link to display the Parts List flyout.

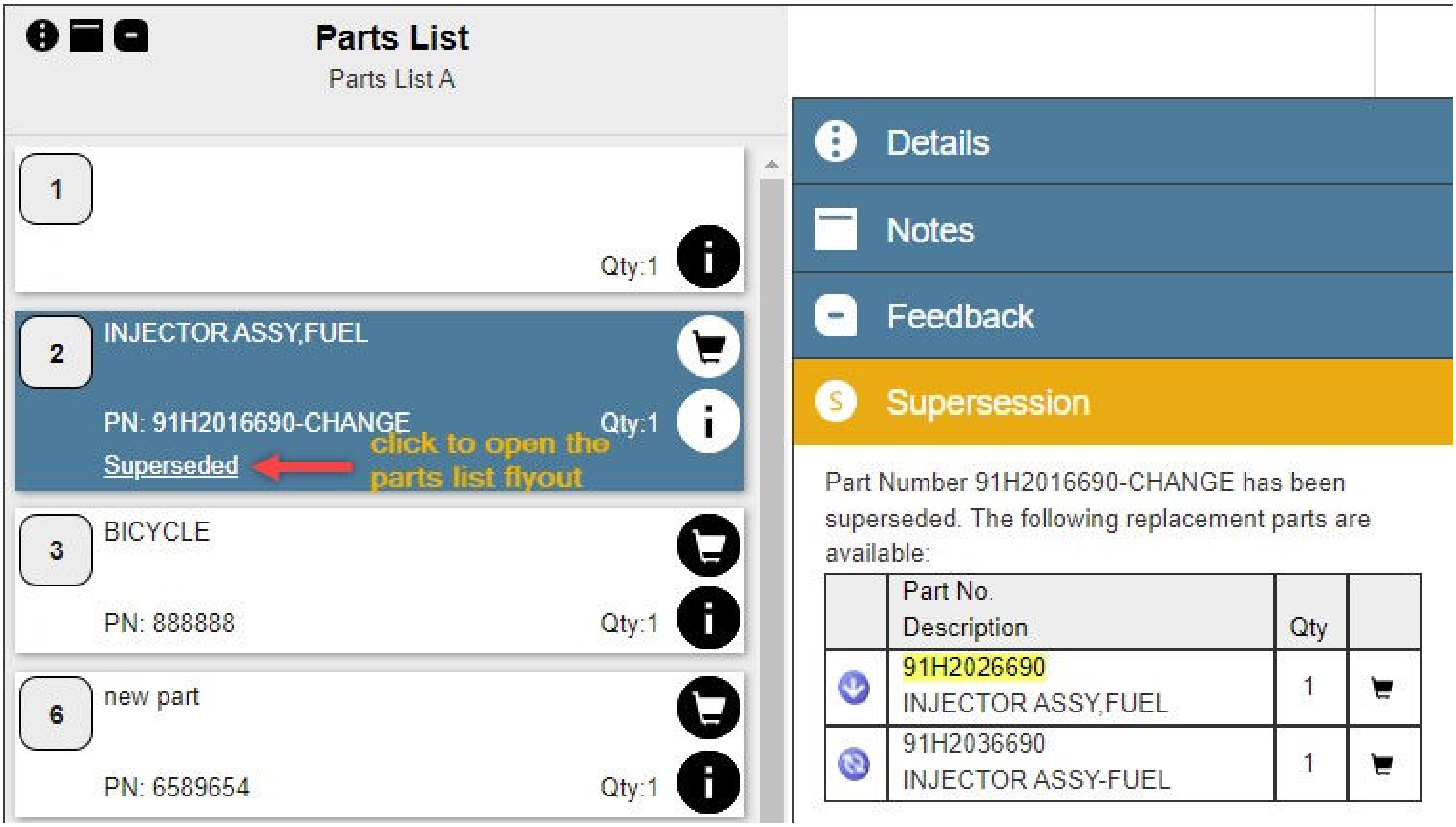


Figure 9-41. Parts List Flyout Showing Supersession Details

NOTE:

a. The part number of the superseded part, the part that was entered in the **Find within** search window, is also highlighted in the flyout.

b. You can also select the parts list first and use the **Find within** search window on that screen as well.

7. The supersession history displays below the Feedback section of the flyout.
8. To add a replacement part, click on the shopping cart displayed on the row.
9. Symbols in the first column of the supersession table indicate the following.

Table 9-1.

Icon	Meaning
	Single (Ahead)
	Single (Interchangeable)
	Multiple (Ahead)

Table 9-1. (Continued)

Icon	Meaning
	Many to One (Interchangeable)

Master Parts - Management Rank

"Management rank" refers to customer demand for the specified part (high, medium, or low). This knowledge is helpful in managing parts stocking and inventory.

Figure 9-42. Part Showing Management Rank

The values for management rank may vary for different regions or customers, but the basic concept is as described above.

Filtering Line Items by Product-Level Applicability

Users can filter line items in a parts list they are viewing to display only the line items they want to see based on the selected product applicabliity. You must have this feature turned on per your customer configuration.

To filter line items:

1. Select a parts publication.
2. Click on a contents card or graphic.

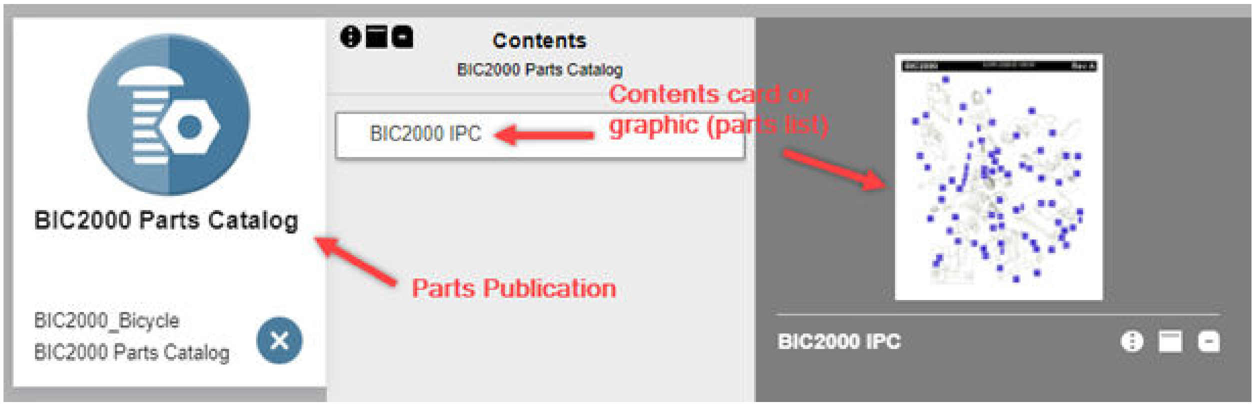


Figure 9-43. Select Parts Publication

3. The parts list will open displaying the line items and parts illustration.
4. Product level applicability, if present, will display at the bottom of the line item.

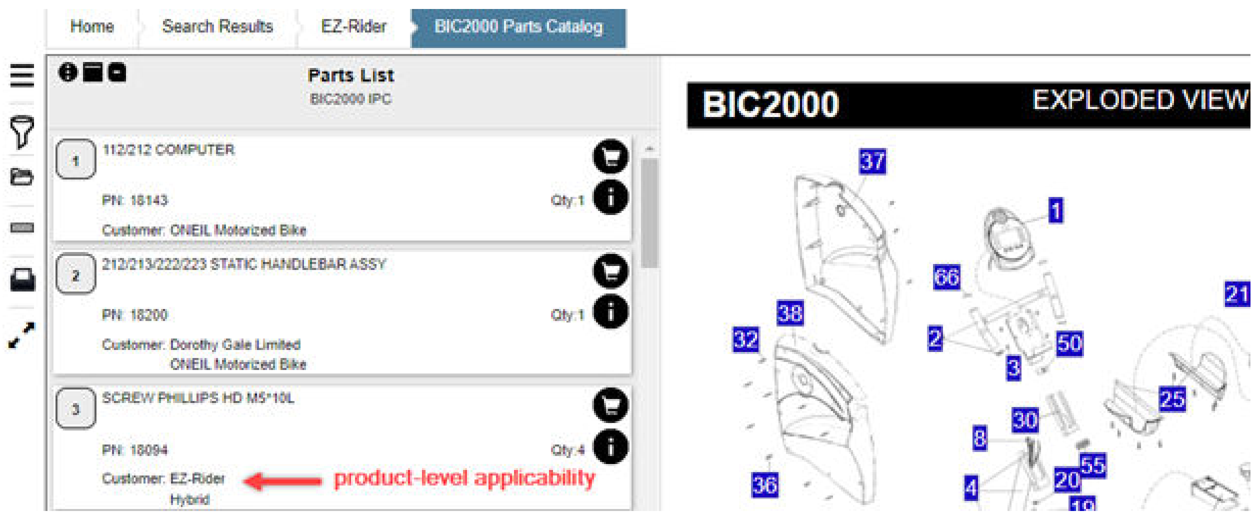


Figure 9-44. Line Item Showing Product Applicability

NOTE: A line item may have more than one product level applicability. The descriptor used to show the product level applicability is configurable for each customer (e.g., Customer, Model, etc.)

5. To filter line items by product level applicability, click on the Filters icon (looks like a funnel) to the left of the parts list.

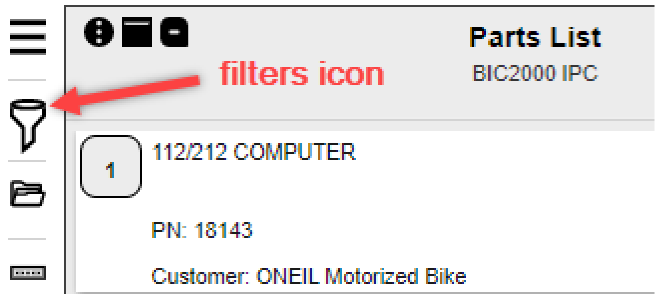


Figure 9-45. Filters Icon

6. Click on the desired filter from the list of available filters to display the choices.

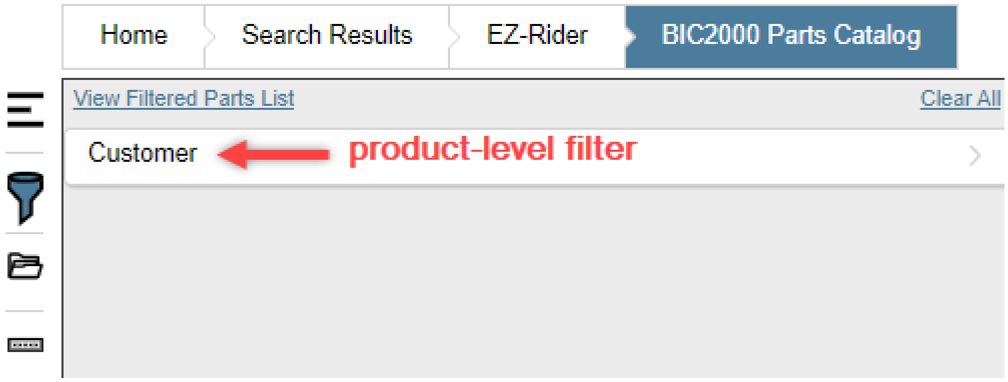


Figure 9-46. List of Product Filters

7. Select one or more of the filters using the checkboxes.

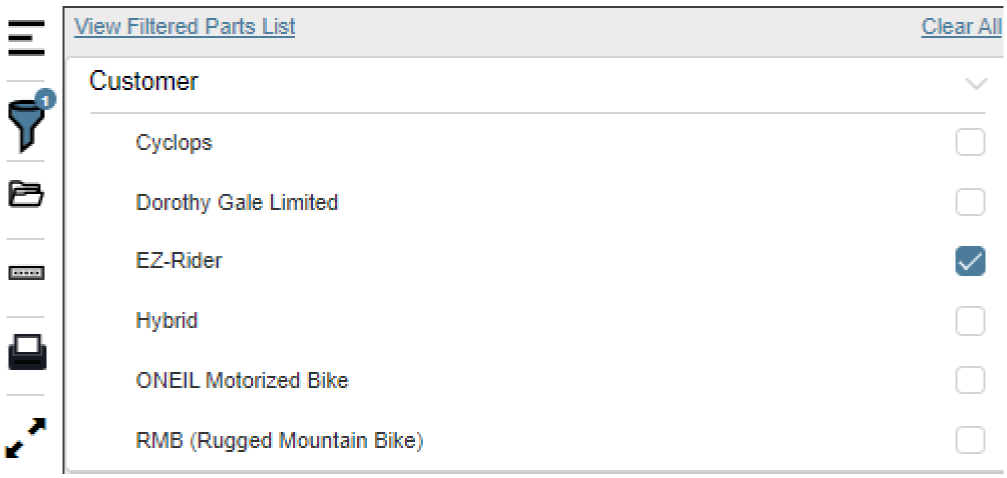


Figure 9-47. List of Products under Customer Filter

8. Click on View Filtered Parts List to apply the filters to the parts list.

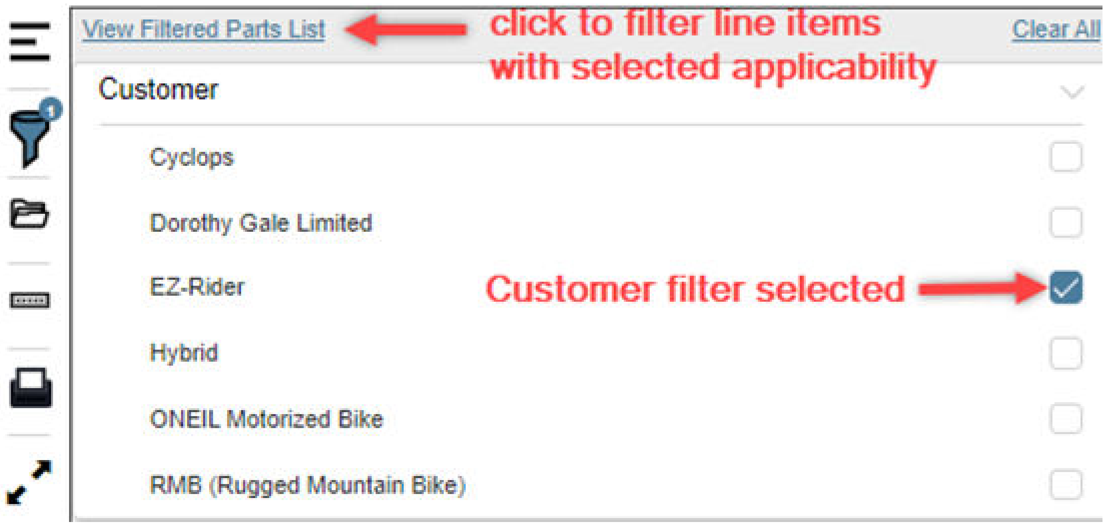


Figure 9-48. View Filtered Parts List Link

9. The parts list will be displayed with the line items that match the selected filter(s).

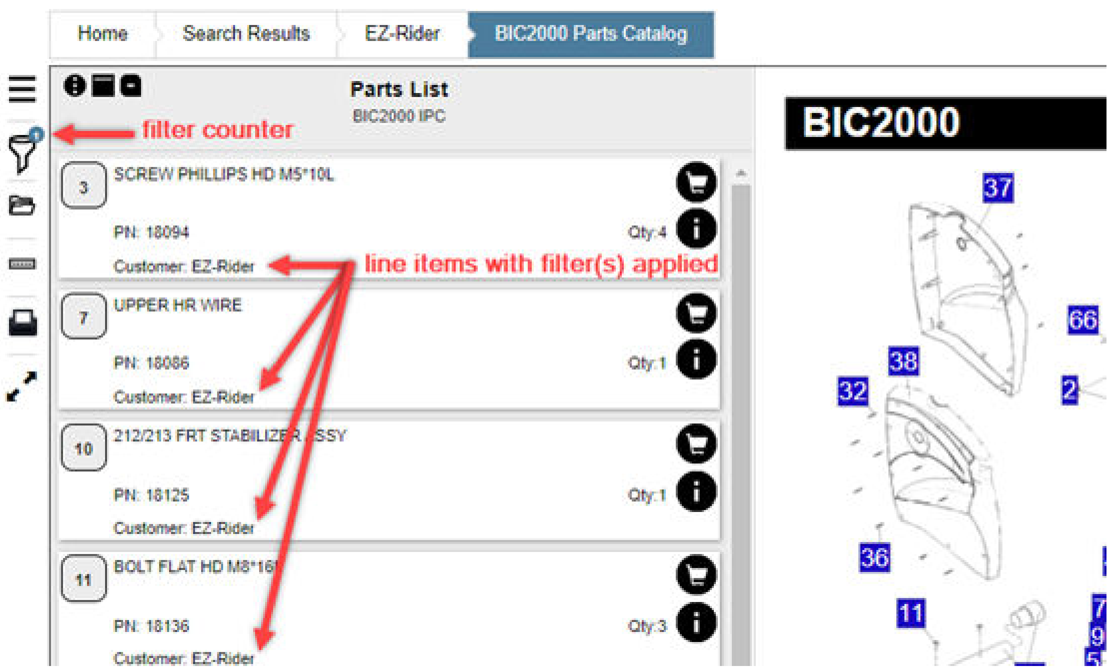


Figure 9-49. Filtered Parts List and Filter Icon Counter

NOTE: The parts list now only displays the line items that have the selected applicability. The counter on the Filters icon indicates the parts list has been filtered and that one product applicability filter has been applied.

10. To clear or remove a filter, click on the Filters icon to deselect the box for that applicability. To clear all filters, click on the Filters icon and then on Clear All.

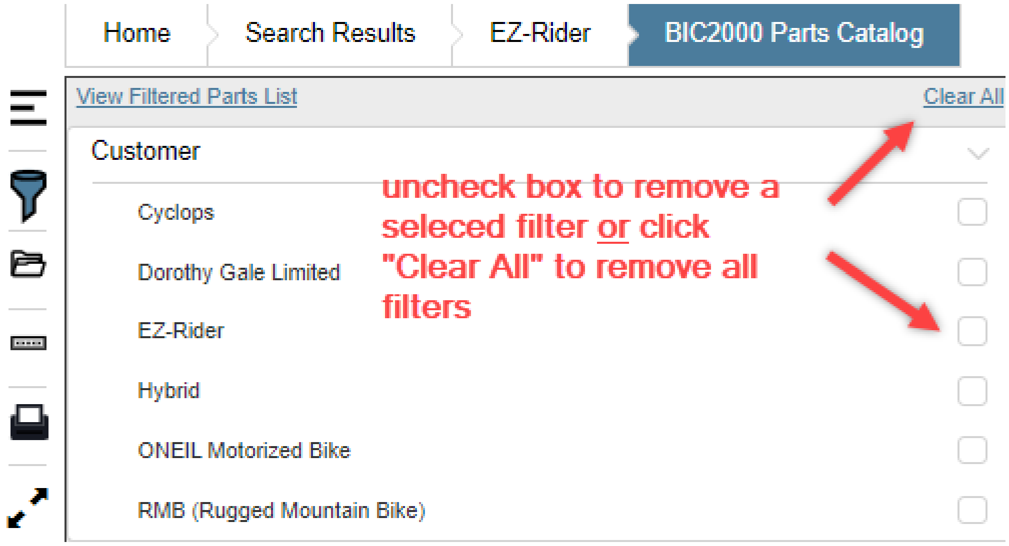


Figure 9-50. Clearing Filters

11. To display the parts list, click View Filtered Parts List or click on the Parts List icon above the Filters icon.

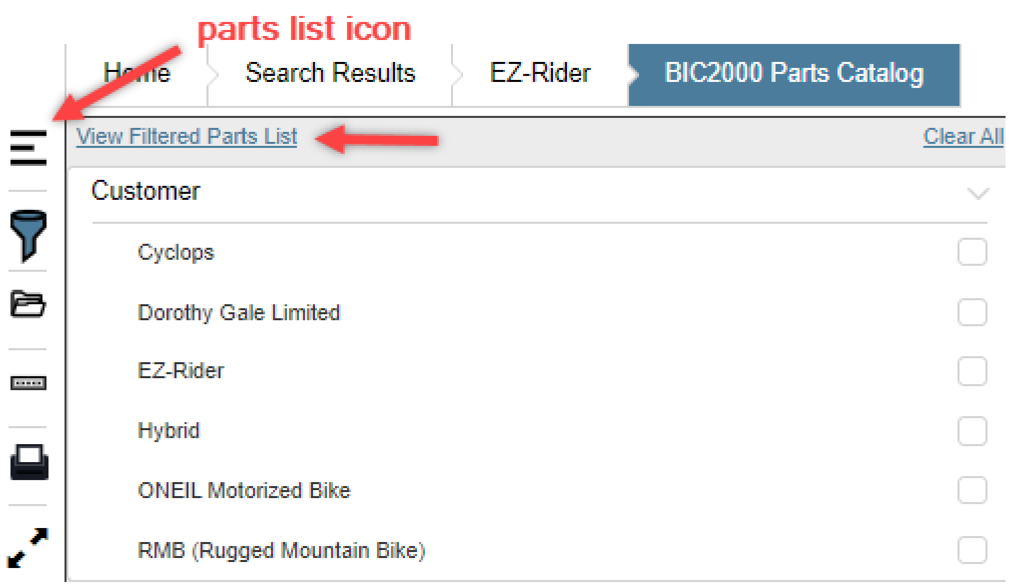


Figure 9-51. Return to Parts List

Filtering Line Items by Model

When a user's configuration includes parts serial numbers and Bill of Materials (BOM) data is available, and the user has entered a valide serial number in the main search window, they can filter the parts list by choosing a line item applicability. In turn, the hotspots for the line items that have been removed due to the line item applicability they selected will be grayed out.

This is similar to how things work when turning the serial number toggle on or off, if one is available.

The following example illustrates the behavior.

1. User has entered a valid serial number or model search in the main search window and BOM data is available for the serial number.
2. User opens a part list associated to a specific model and sees the parts list displayed for the selected model. Also, the Filters icon shows one model has been selected. In this example, there are several models associated to the parts list, not all of which include every line item.

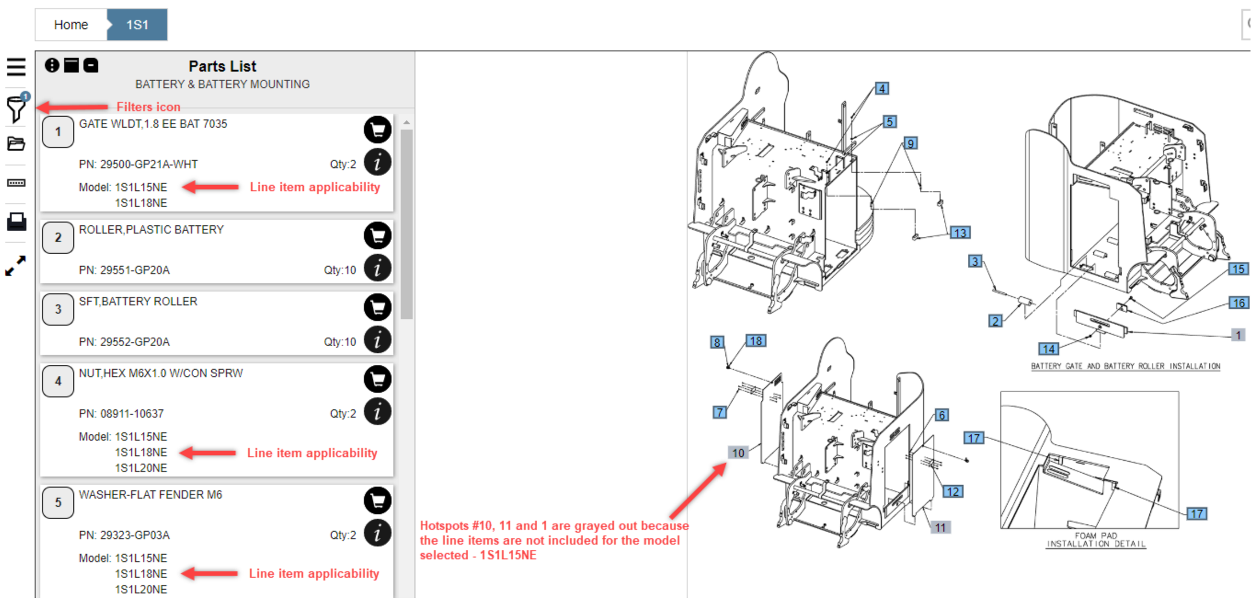


Figure 9-52. Parts List for Selected Model

NOTE:

a. Several of the line items display line item applicability. If the line item applies to specific models, these models are listed.

b. Multiple models can be associated to a line item.

c. Multiple model filters can be selected using the Filters icon for one parts list.

d. Line items that are not included for the selected model will be filtered out of the parts list and the corresponding hotspot(s) in the parts illustration will be grayed out.

3. To select a different model filter, click on the Filters icon, uncheck the box for any currently selected models and check the box for the desired model(s).

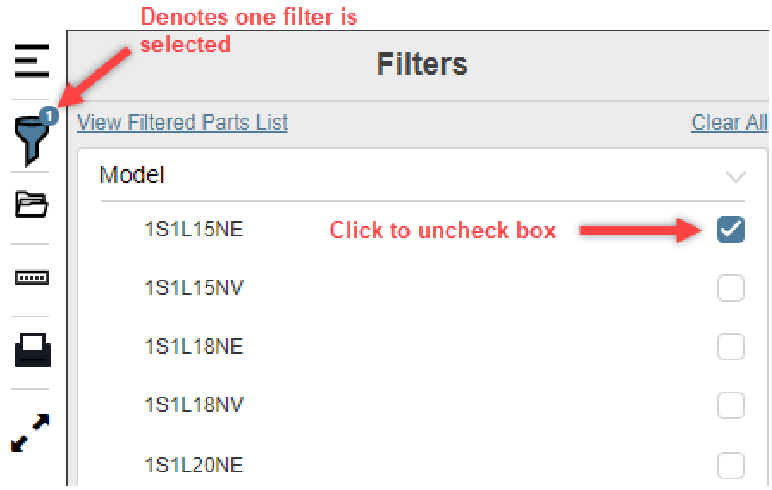


Figure 9-53. Currently Selected Model

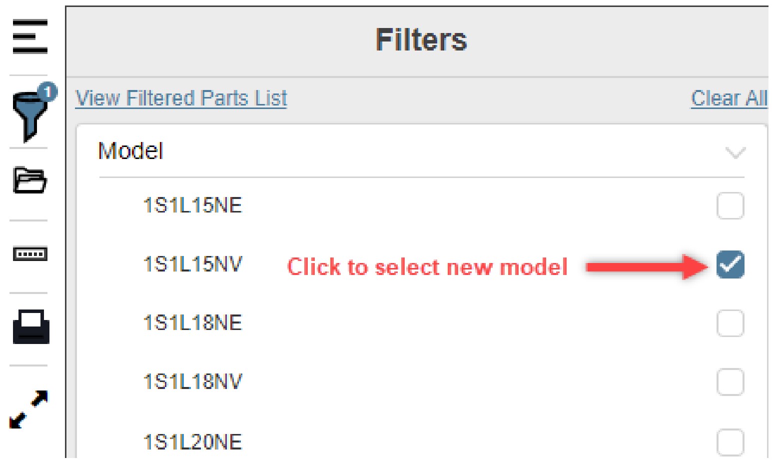


Figure 9-54. Newly Selected Model

NOTE: When models are selected, a counter will display by the Filters icon and show how many filters have been selected. To remove all filters, click on the Clear All link.

4. Click the link labeled View Filtered Parts List to display the parts list with the new applicability (model).

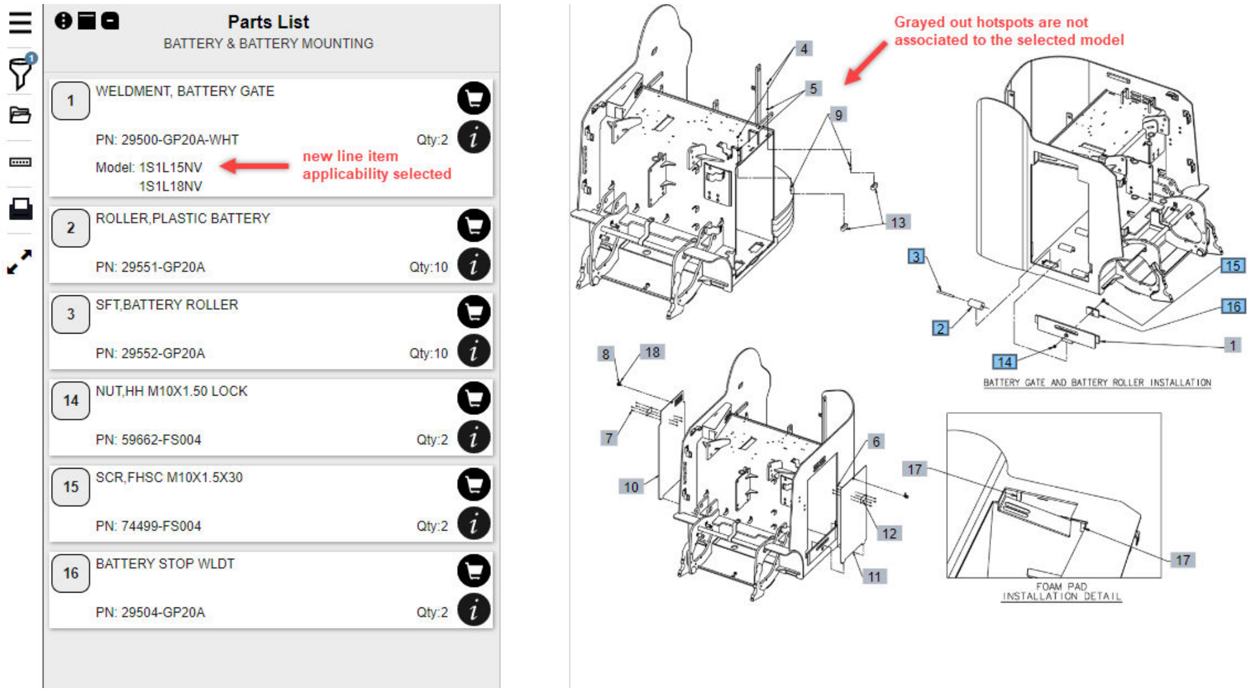


Figure 9-55. Parts List with Different Model Selected

5. Click the View Filtered Part List link to return to the parts list. The parts list will display the line items associated to the currently selected model or models.
6. Multiple models can also be selected at the same time.

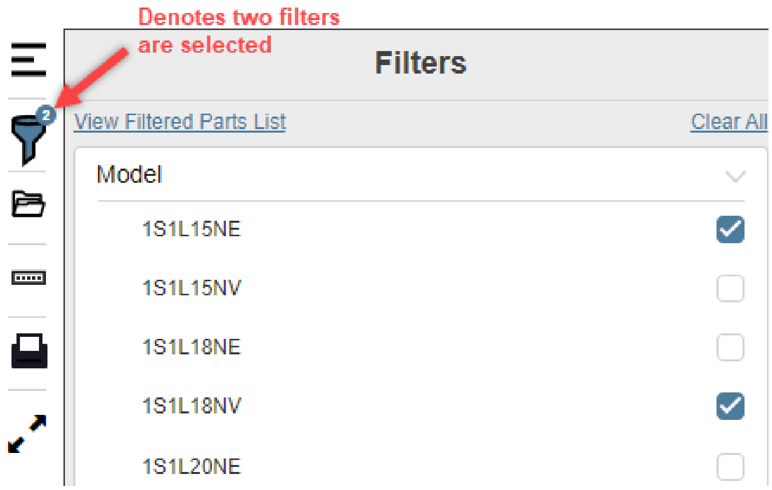


Figure 9-56. Multiple Models Selected

Filtering Line Items by Serial Number Applicability

Users can filter line items displayed in a parts list to those based on the serial number they have selected. They must have this feature turned on per their customer configuration.

To filter line items by serial number:

1. Enter a serial number in the main search window and select the serial number filter from the drop-down list.

Figure 9-57. Enter a Serial Number

2. Press Enter or click the magnifying glass icon to execute the search.
3. Select a search result and parts publication.

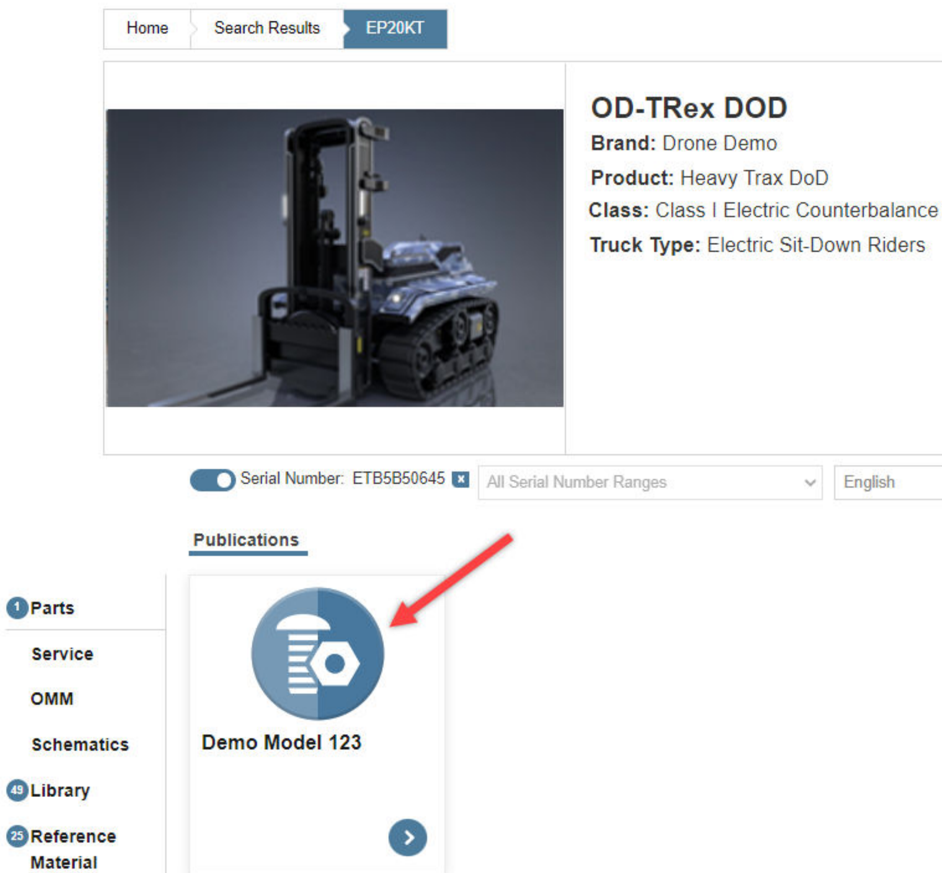


Figure 9-58. Select a Parts Publication

4. Select a parts list.
5. The parts list will open displaying the line items and parts illustration.

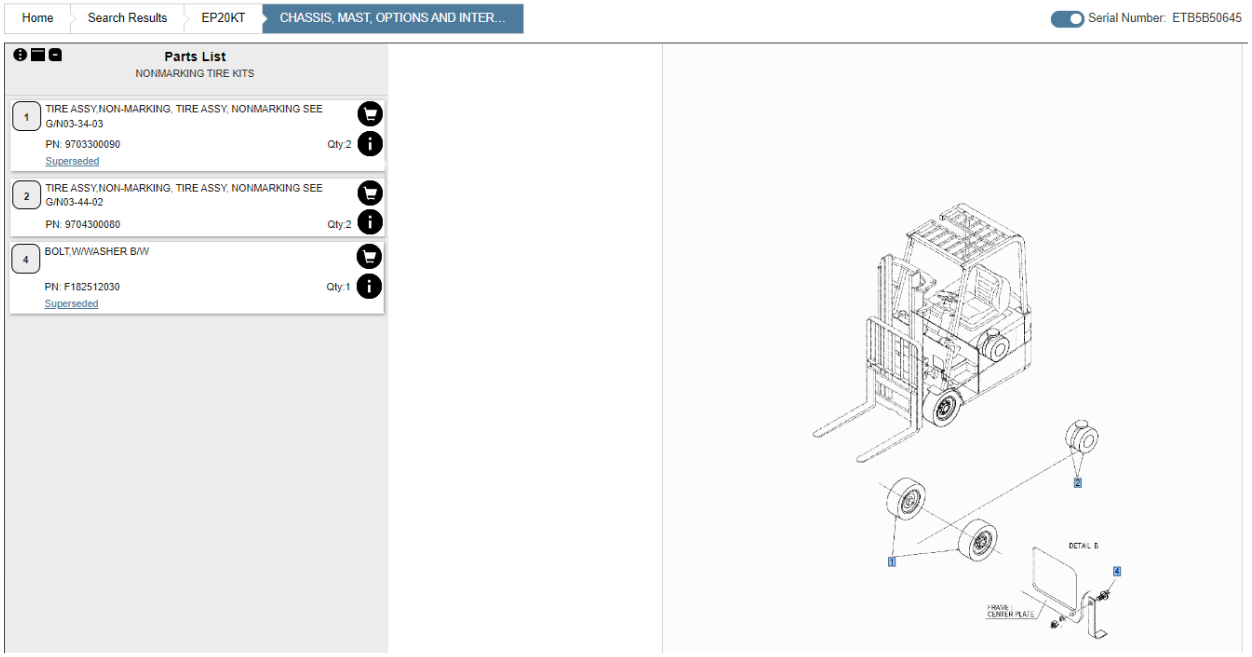


Figure 9-59. Parts List and Parts Illustration

NOTE: The serial number toggle button is turned on by default and line items associated with the serial number are displayed.

6. By turning the serial number toggle off, all line items in the parts list are displayed whether or not they are associated to the serial number.

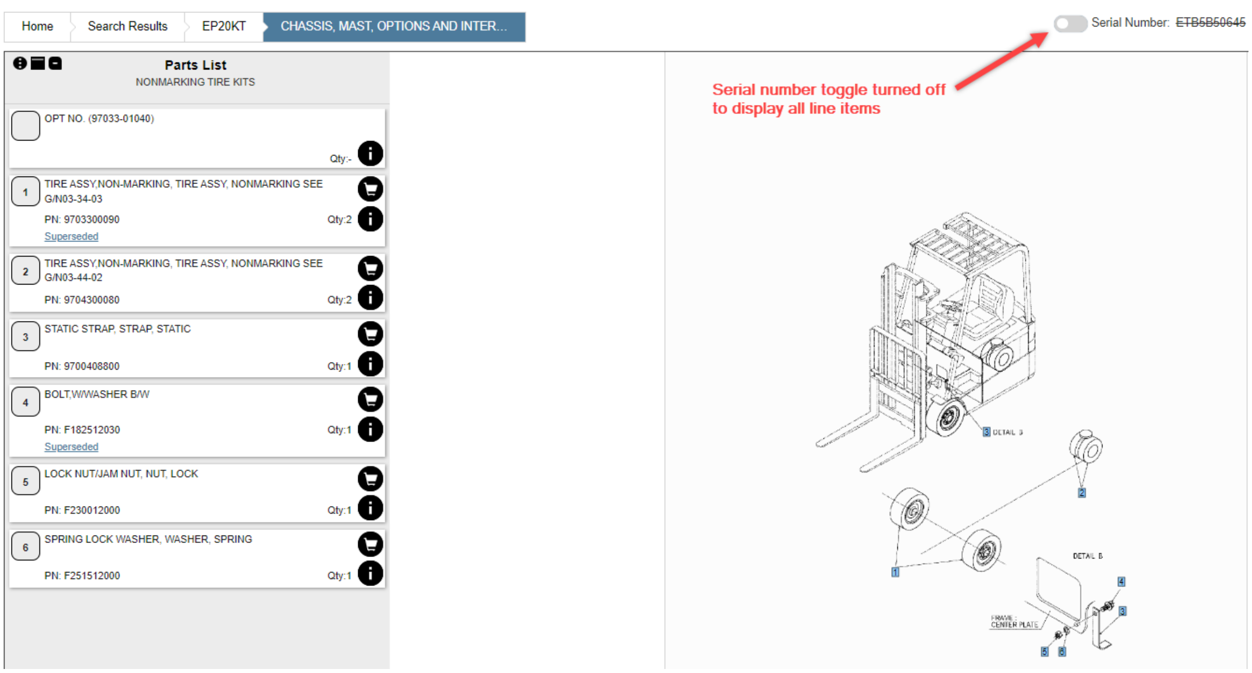


Figure 9-60. Serial Number Toggle Off

7. When the serial number toggle is turned on and no line items in the parts list are associated to the selected serial number, the following pop-up message will momentarily display at the bottom of the screen.

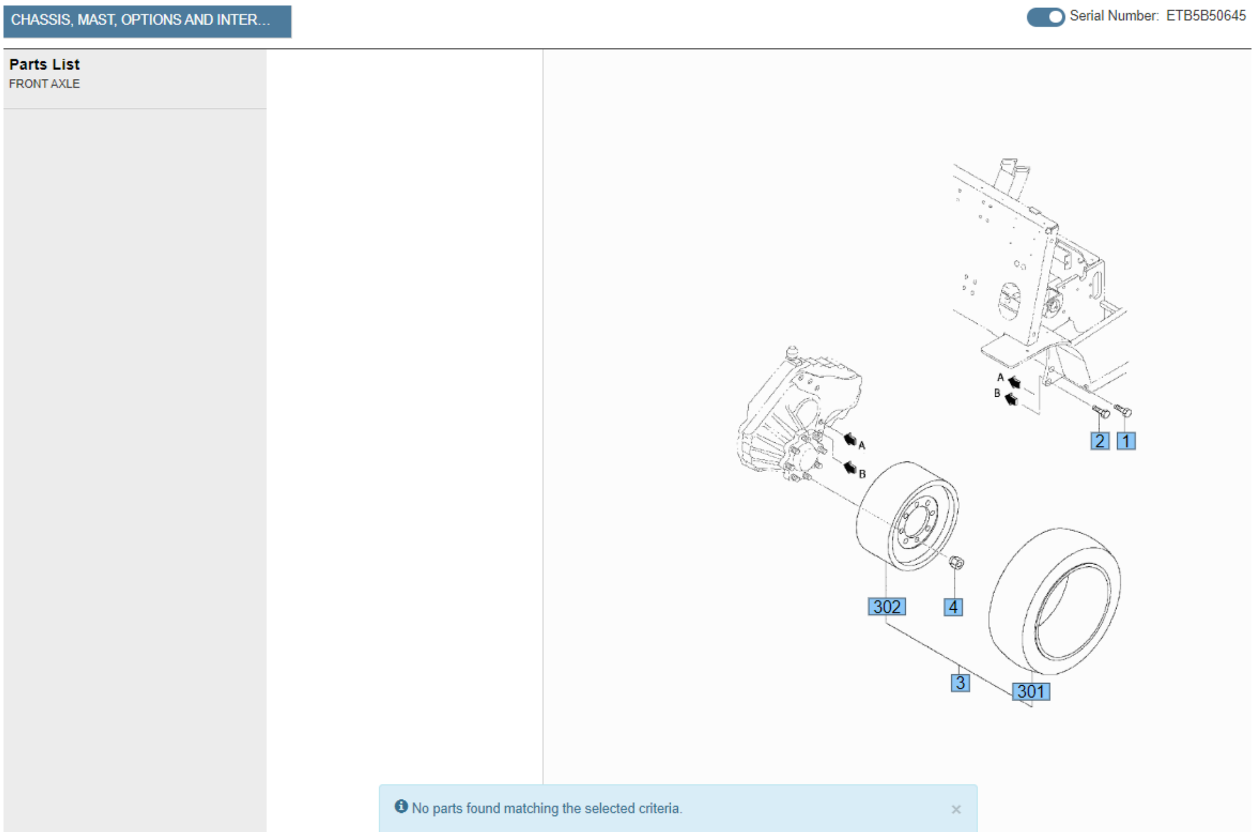


Figure 9-61. Serial Number Toggle On

Filtering Line Items by Serial Number

When the user's customer configuration includes parts serial numbers and there are BOMs associated to the serial numbers, the system grays out the hotspot in the parts illustration when the serial number toggle button has been turned on and the line item has been filtered out. When the serial number toggle button is turned off, the line item will be displayed and the hotspot will not be grayed out.

The following example illustrates the behavior.

1. User has entered a valid serial number in the main search window and BOM data is available for the serial number.
2. User opens a part list associated to the serial number.
3. User will see that with the serial number toggle button turned on, some line items will be filtered out in the parts list and the accompanying hotspots will be grayed out in the parts illustration.

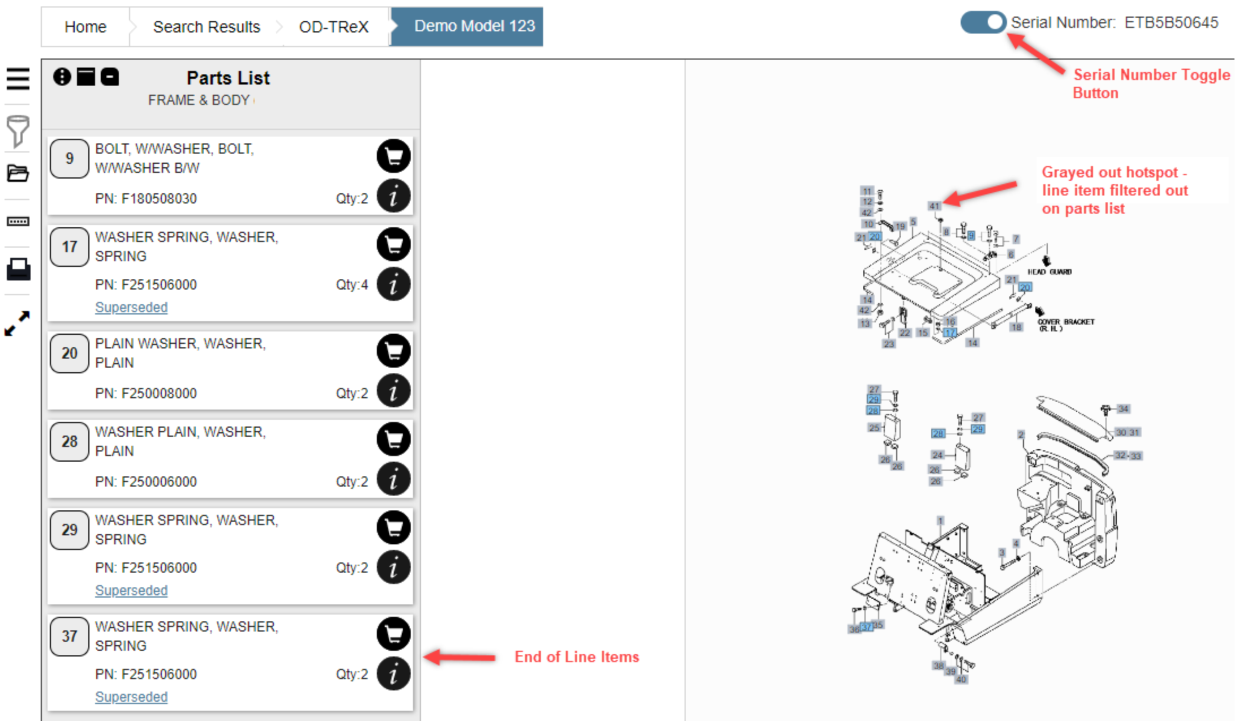


Figure 9-62. Serial Number Toggle On - Line Items Filtered Out

4. When the serial number toggle button is turned off, line items that had been previously filtered out will display and the accompanying hotspots will not be grayed out.

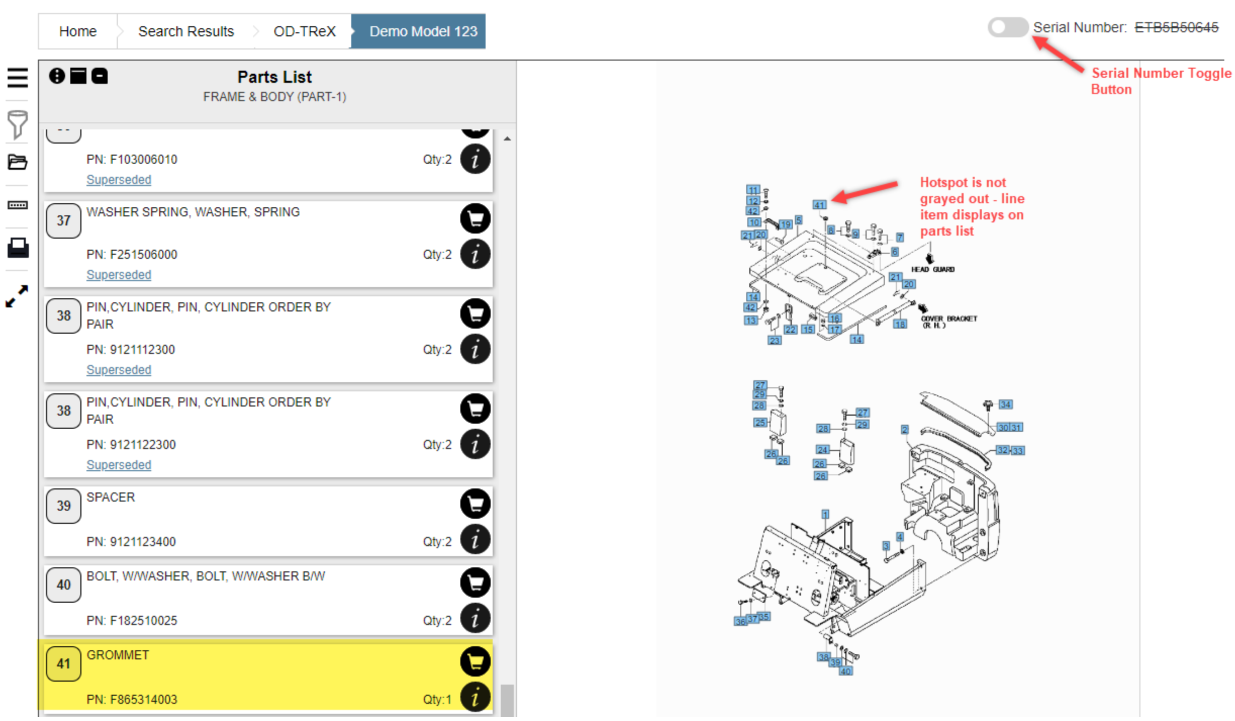


Figure 9-63. Serial Number Toggle - Line Items Not Filtered Out

Serial Number Toggle Behavior

Generally, when the Serial Number toggle is off, all line items in a parts list are displayed (as they are not associated to a specific serial number). When the toggle is turned on, some of the line items are not displayed (as some line items are only associated to a specific serial number).

There is another scenario where a serial number can be searched that is not associated to a BOM, but is within a serial number range. In this situation, the Serial Number toggle will display in the off position, disabled and not clickable. If the user hovers over or attempts to click on the toggle, they will see a tooltip that says "No serial specific content is available".

1. User searches on a serial number that is not associated to a BOM but is within a serial number range and associated to content.
2. When the user views the product details page, they will see the serial number toggle is on, and content is filtered by the serial number.

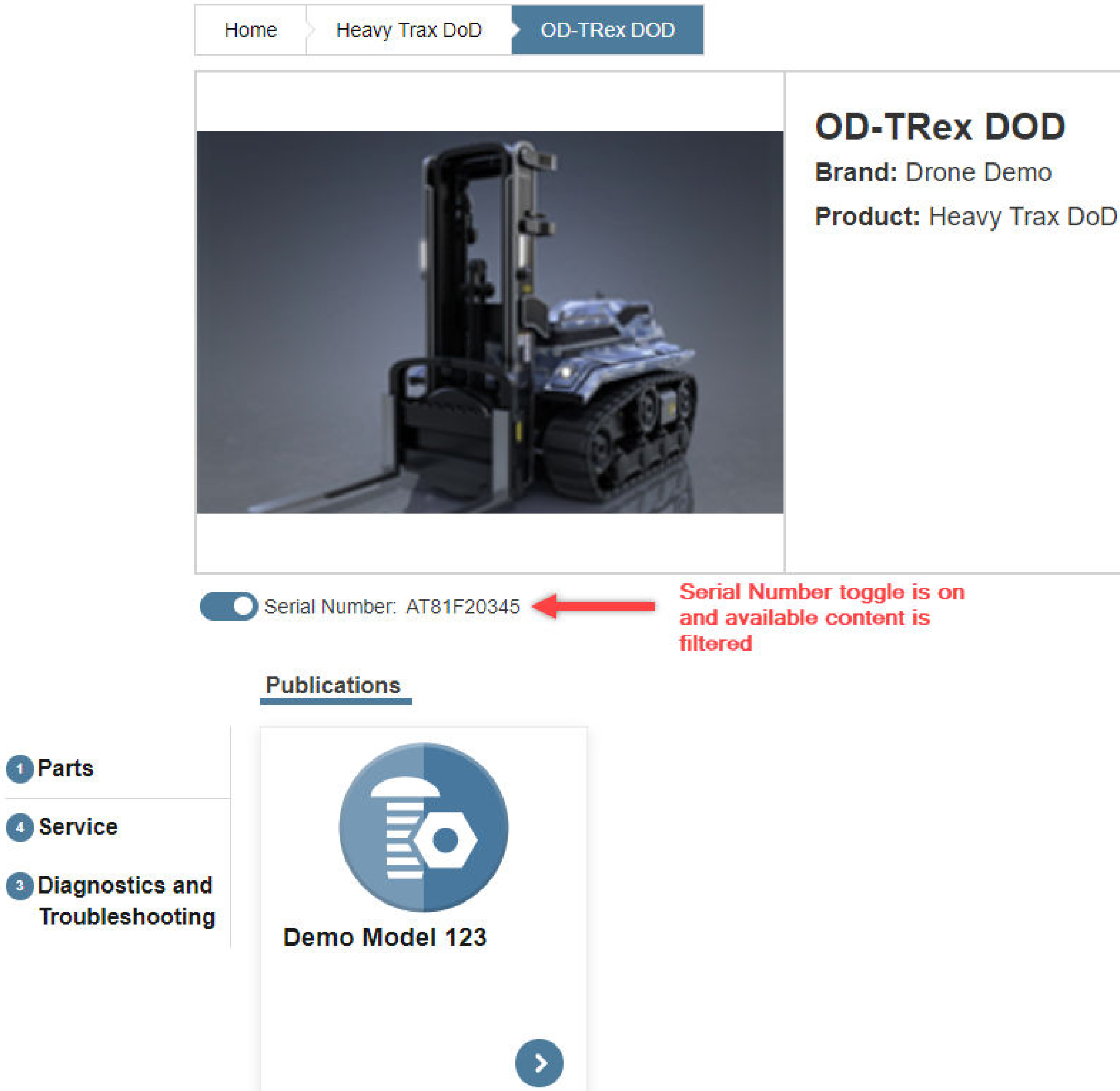


Figure 9-64. Product Details Page - Serial Number Toggle On

a. Turning the serial number toggle off displays all content (e.g., additional sources show up on the Product Details page).

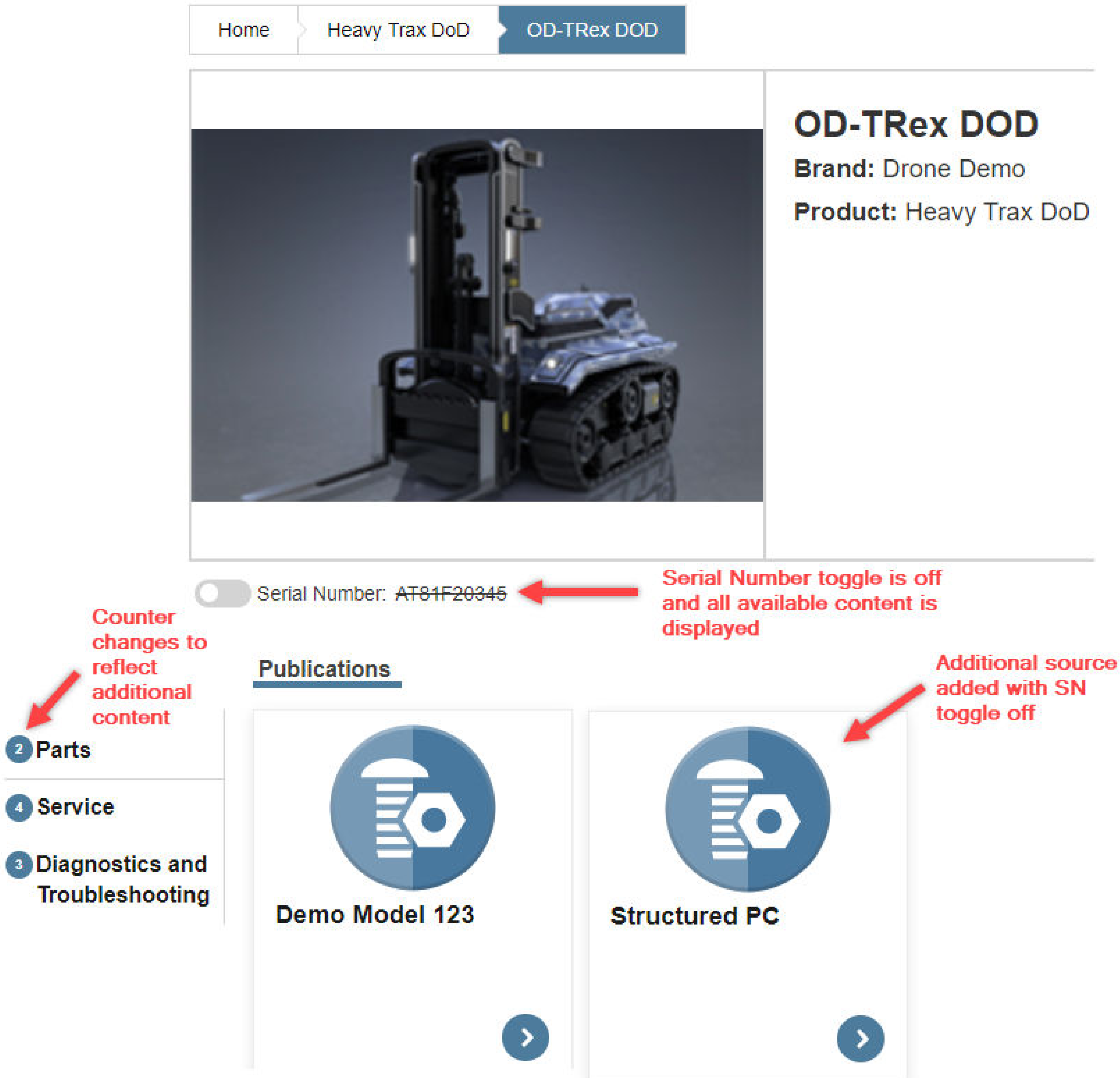


Figure 9-65. Product Details Page - Serial Number Toggle Off

3. With the Serial Number toggle on, select a parts publication from the Product Details page.

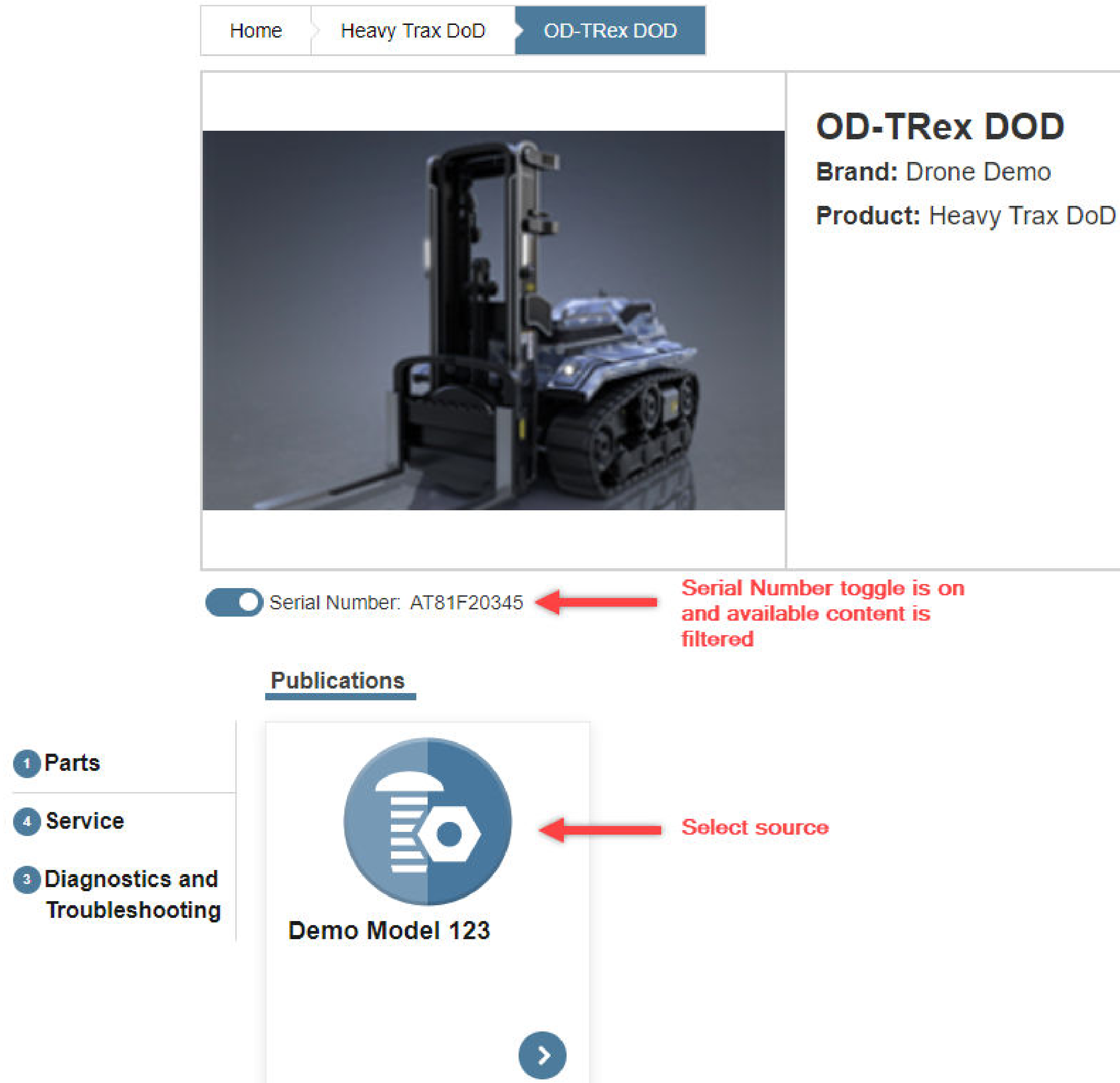


Figure 9-66. Product Details Page - Serial Number Toggle On

4. When the part list opens, the serial number toggle will be off even though at the Product Details page it was on, and a message will display at the bottom of the screen that says no serial specific content is available.

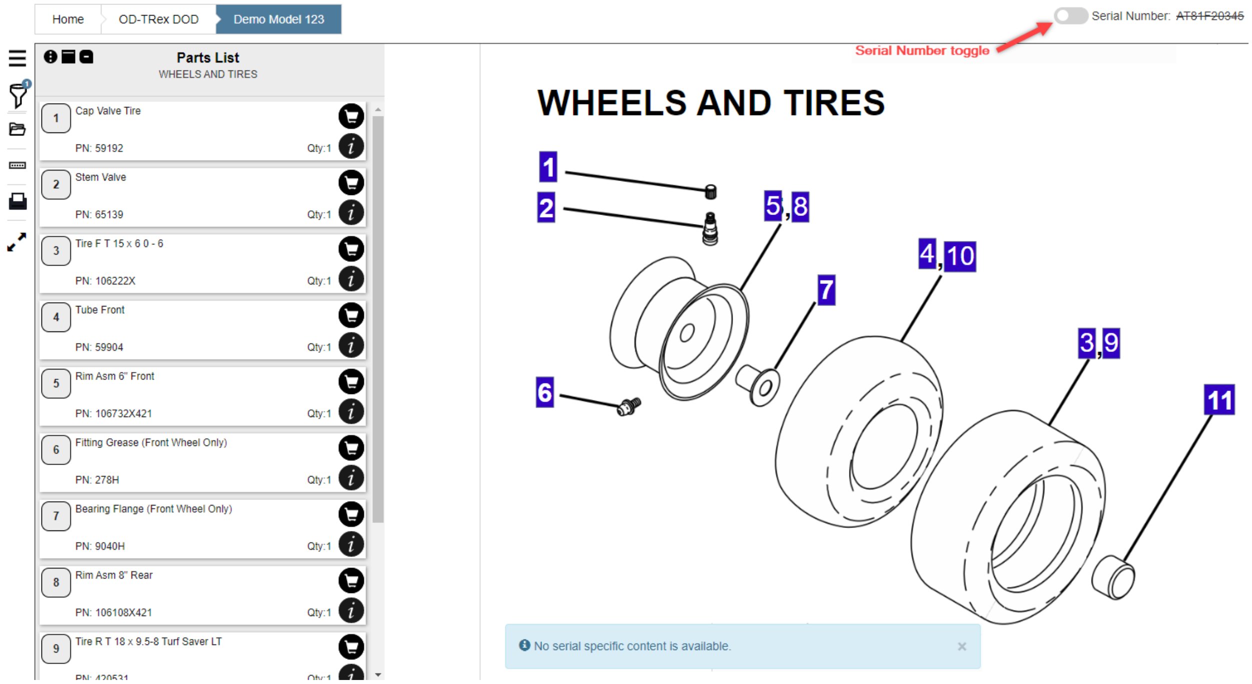
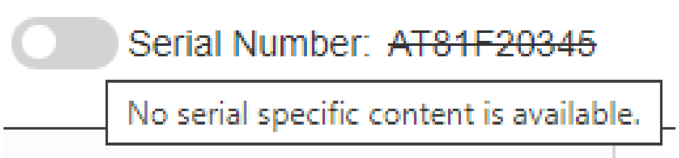


Figure 9-67. Serial Number Search With No Serial-Specific Content Available

NOTE: The message will close after a few seconds, but if the user hovers over the serial number toggle, the same message will display as a tooltip.



5. None of the line items are hidden because there is no BOM to filter anything.

Filters Icon Indicators

Filters Icon

Depending on availability of this feature to customers or line item applicability, the Filters icon may not be active or may be grayed out.

Active with no applicability applied

Figure 9-68. Filters Icon - No Applicability Applied

Status: Line item filtering is available but no product-level applicability has been applied.

Active with applicability applied:
Icon:

Figure 9-69. Filters Icon - Applicability Applied

Status: Line item filtering is available and one or more line items in the parts list have had product-level applicability applied.

Inactive (grayed out)
Icon:

Figure 9-70. Filters Icon - Inactive

Status: Line item filtering is available but none of the line items in the parts list have product-level applicability that matches any of the filters.

Icon does not display at all

Figure 9-71. Filters Icon Not Available

Status: Line item filtering is not available under the current customer configuration; if it were available, the Filters icon would display between the parts list and contents icons (indicated by red pointer above).

Printing Parts Content

When printing content for a parts publication, users will be prompted to print the currently selected parts list or the whole parts publication. They will also be prompted to print both the parts list(s) and parts illustration(s), or just the parts list(s) or just the parts illustration(s).

To Print Parts Content

1. Select a parts publication.
2. Click the Print icon from the left pane of the Parts Viewer.

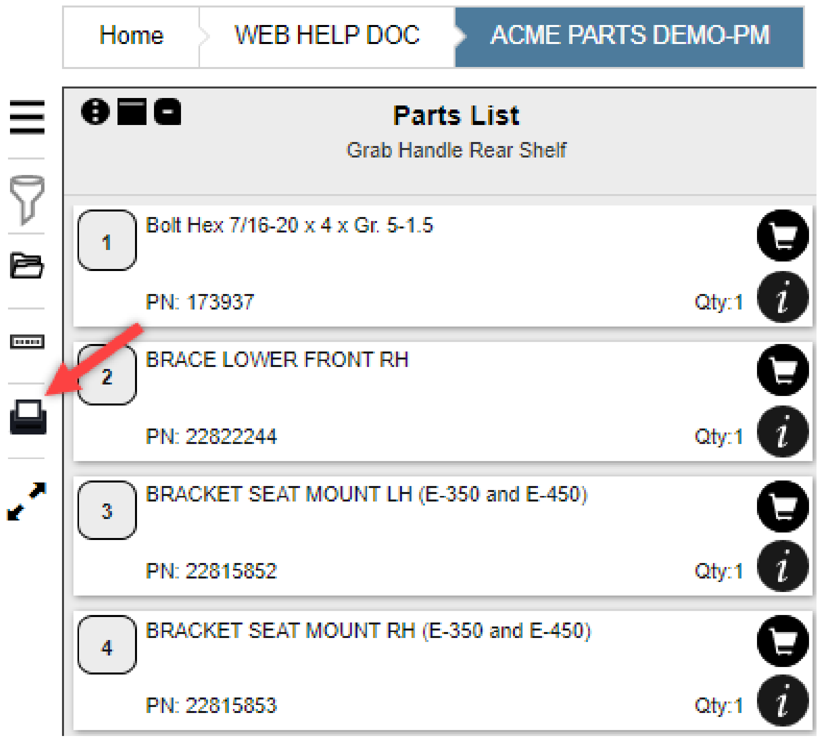


Figure 9-72. Print Icon

3. A Print Parts Content pop-up window will open.

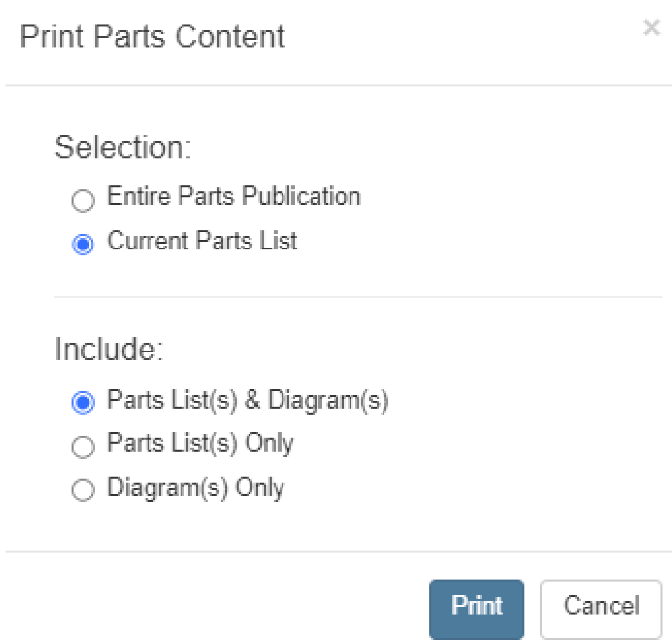


Figure 9-73. Print Parts Content Pop-Up

4. Check the appropriate print options for the desired print job.
5. Click the Print button.
6. A print dialogue window will open to review printer properties and change selections.
7. Click the Print button to print the selections.

Parts Search

Filtering Search Results

Users can apply filters to Parts search results to narrow down the list of parts and quickly find the desired content.

After running a search, the search results page will display.

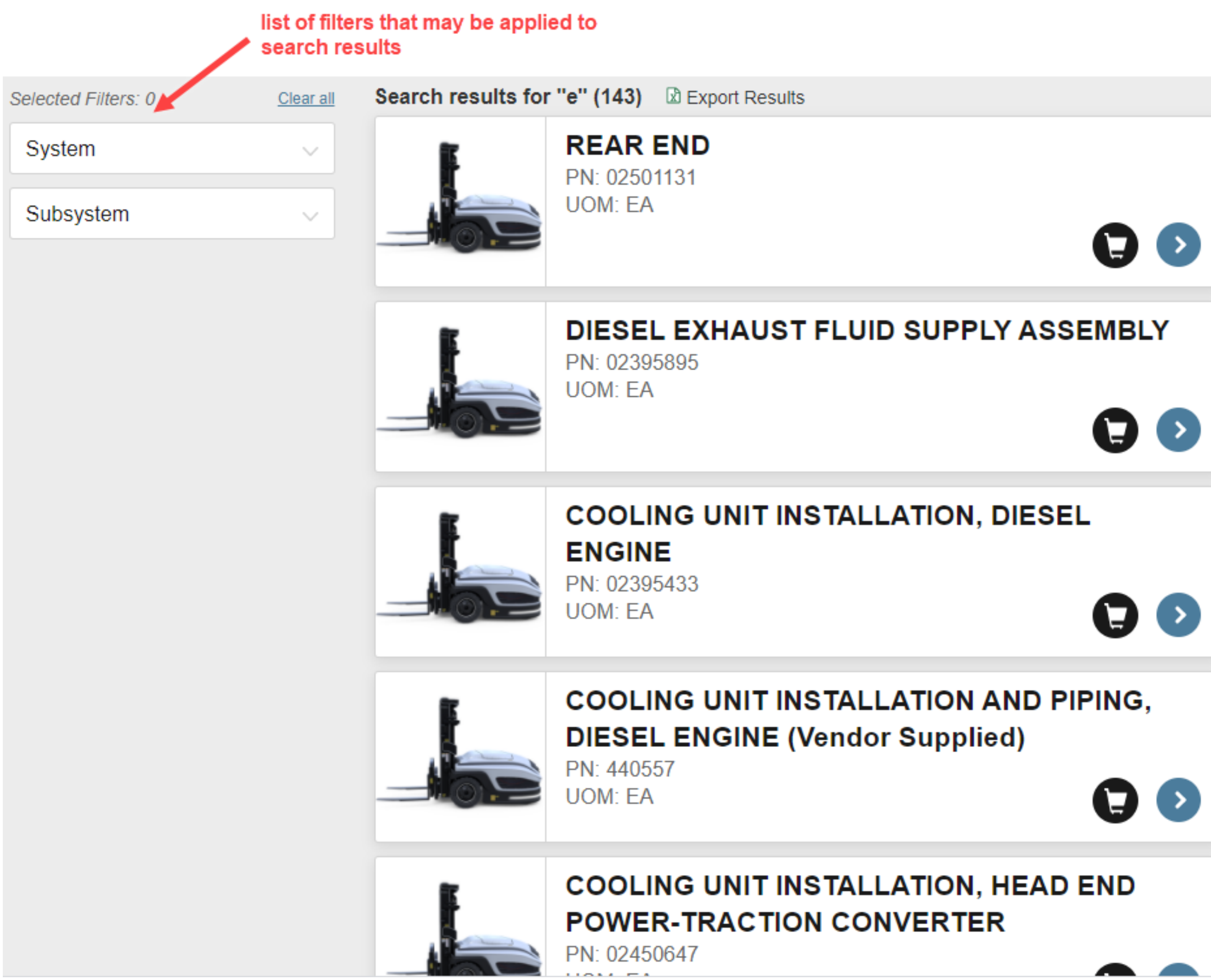


Figure 9-74. Parts Search Results

1. In the example above, there are filters for System and Subsystem. Click on a filter to expand the tile and display the available choices.

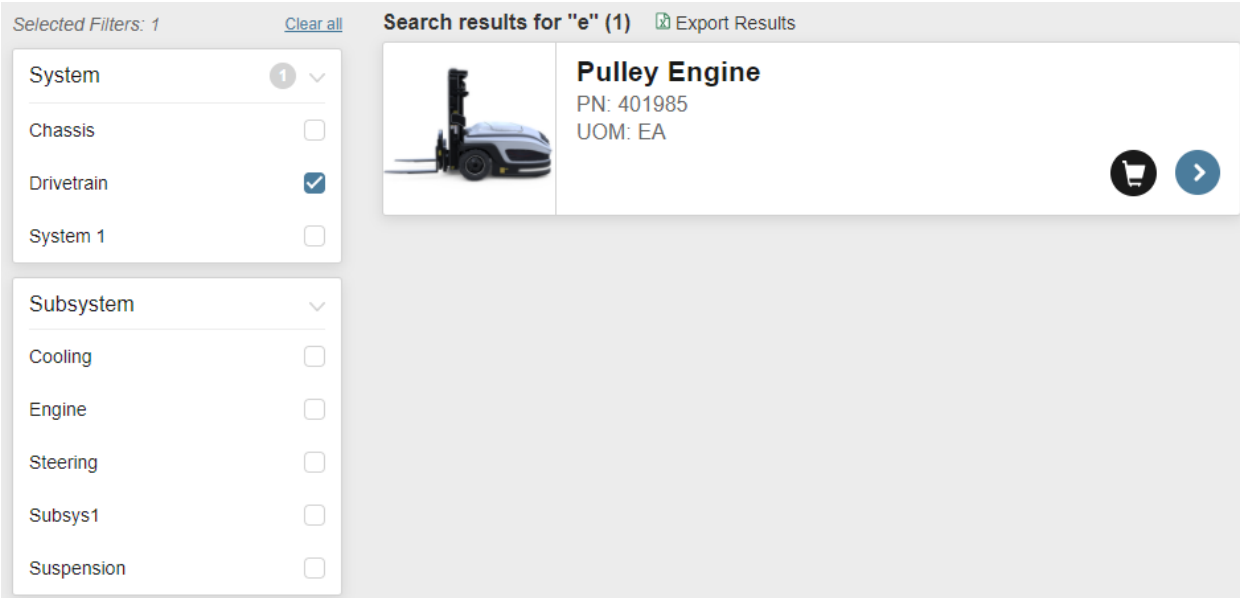


Figure 9-75. Parts Filters

NOTE:

a. As filters are selected (by checking the box to the right of the filter name), the search results will automatically change and display only the results that apply to the selected filter(s).

b. The number of choices (checkboxes) for a given filter will vary by source and can get quite lengthy, depending on the parts search that was performed.

c. If a filter or filters are selected and no results match the filters, a pop-up message will display that says "No results found. Try removing filters to see more results."

2. To return to the original search results, uncheck the filters that are selected.
3. Filtered results can be exported to the user's local machine via the Export Results link. Refer to Exporting Search Results for more details.

Exporting Search Results

Users can export parts, product or parts details Where Used search results to a .csv file that can be saved to their computer. This allows them to access the results later outside of the ONeSOURCE Client.

NOTE: When the total number of results returned by the search is 1,000 or fewer, the exported file will contain all of the items within the file. When there are more than 1,000 results, the exported file will contain the first 1,000 items only.

To export search results:

1. From the search results page, click on the displayed link labeled Export Results.

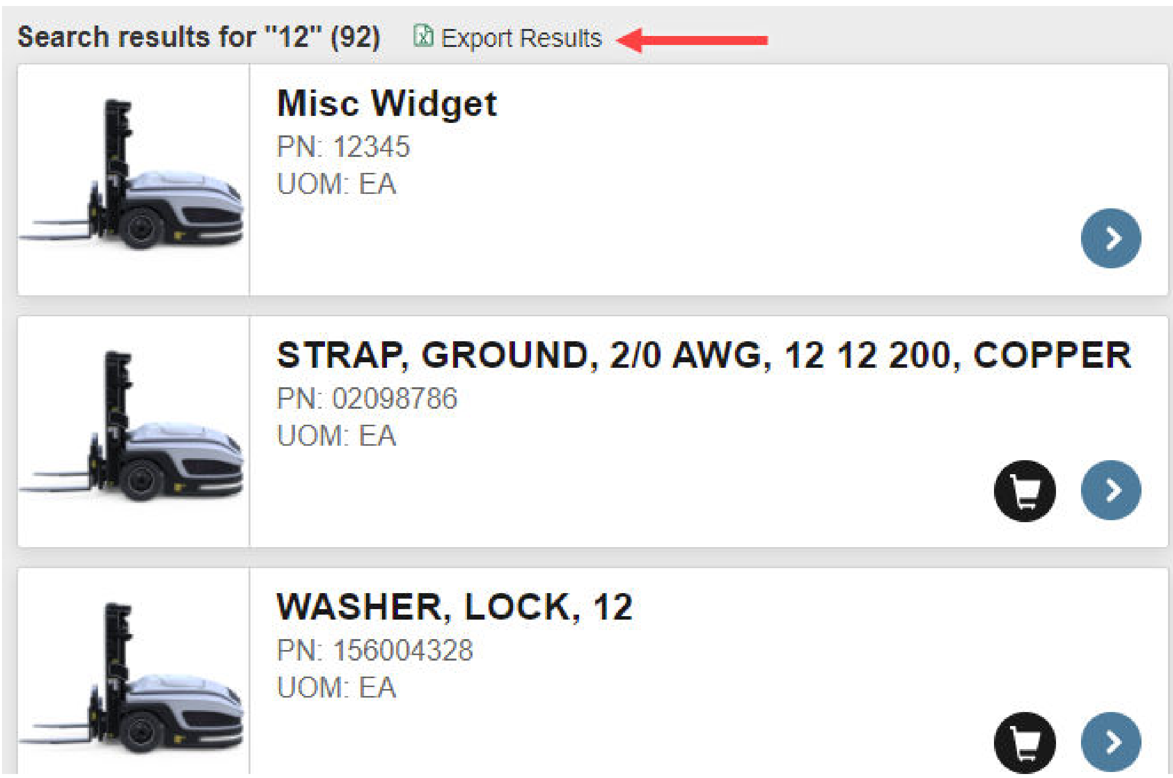


Figure 9-76. Parts Search Results

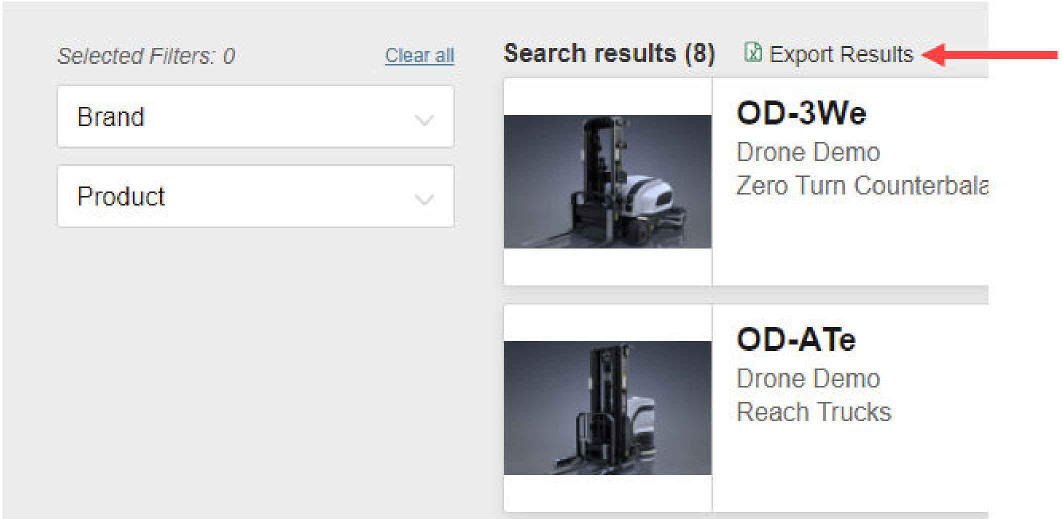


Figure 9-77. Products Search Results

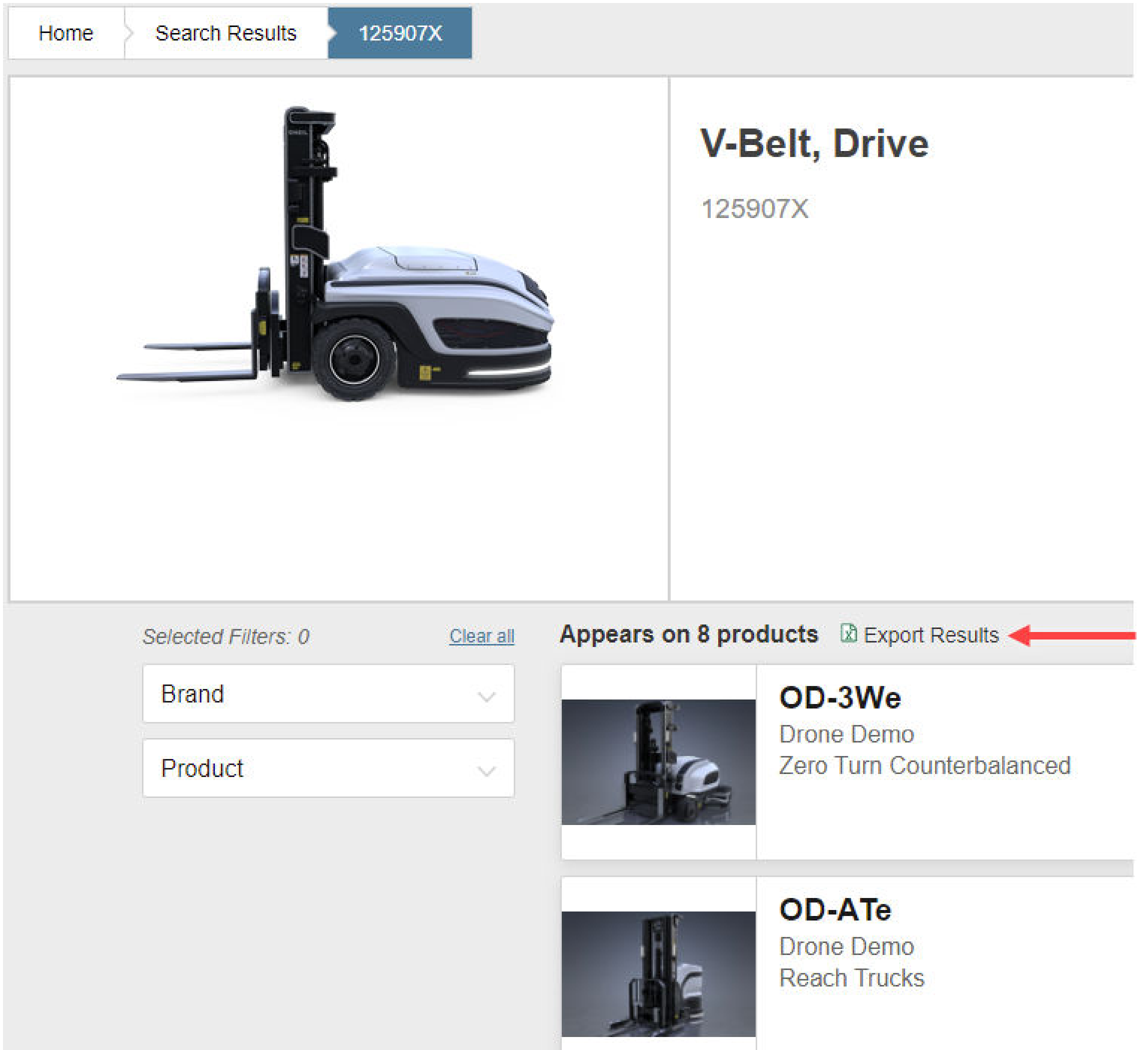


Figure 9-78. Parts Details Where Used Results

2. A .csv file will be downloaded to the user's machine.

3. Users can access the file by clicking on the file displayed at the bottom of the browser, or by going to the Downloads folder on their machine.

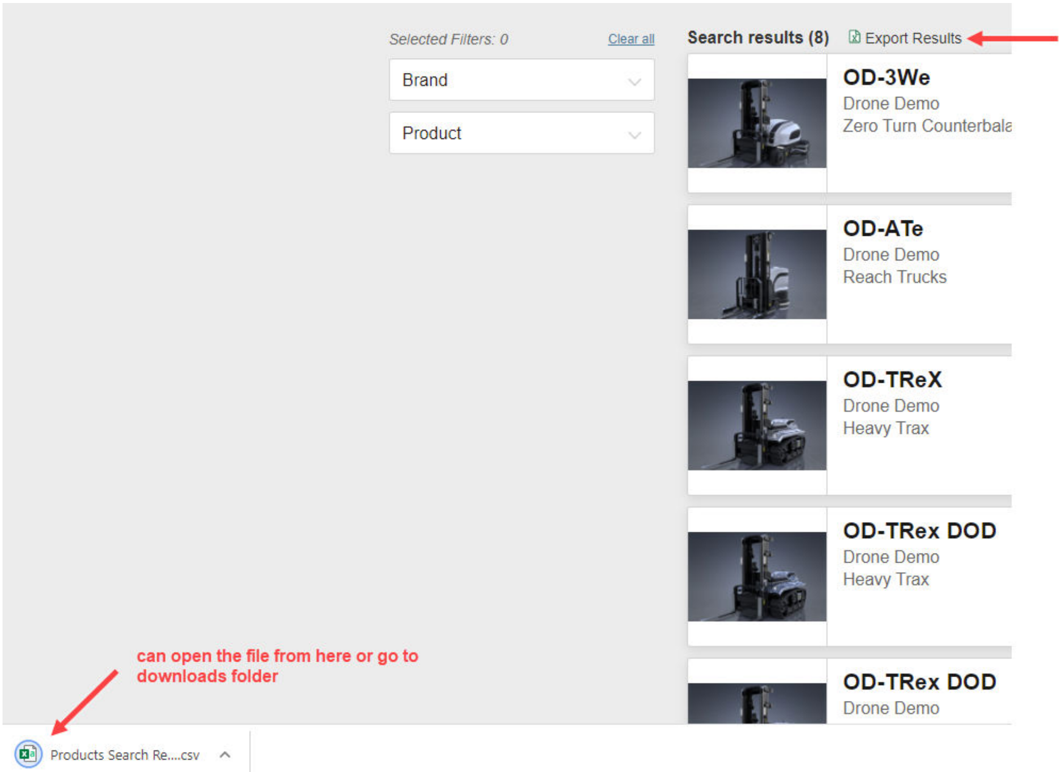


Figure 9-79. Opening Exported Search Results

4. Double click the file to open it.
5. The following default fields will be output: Name, Description, Type, Brand, and Product.

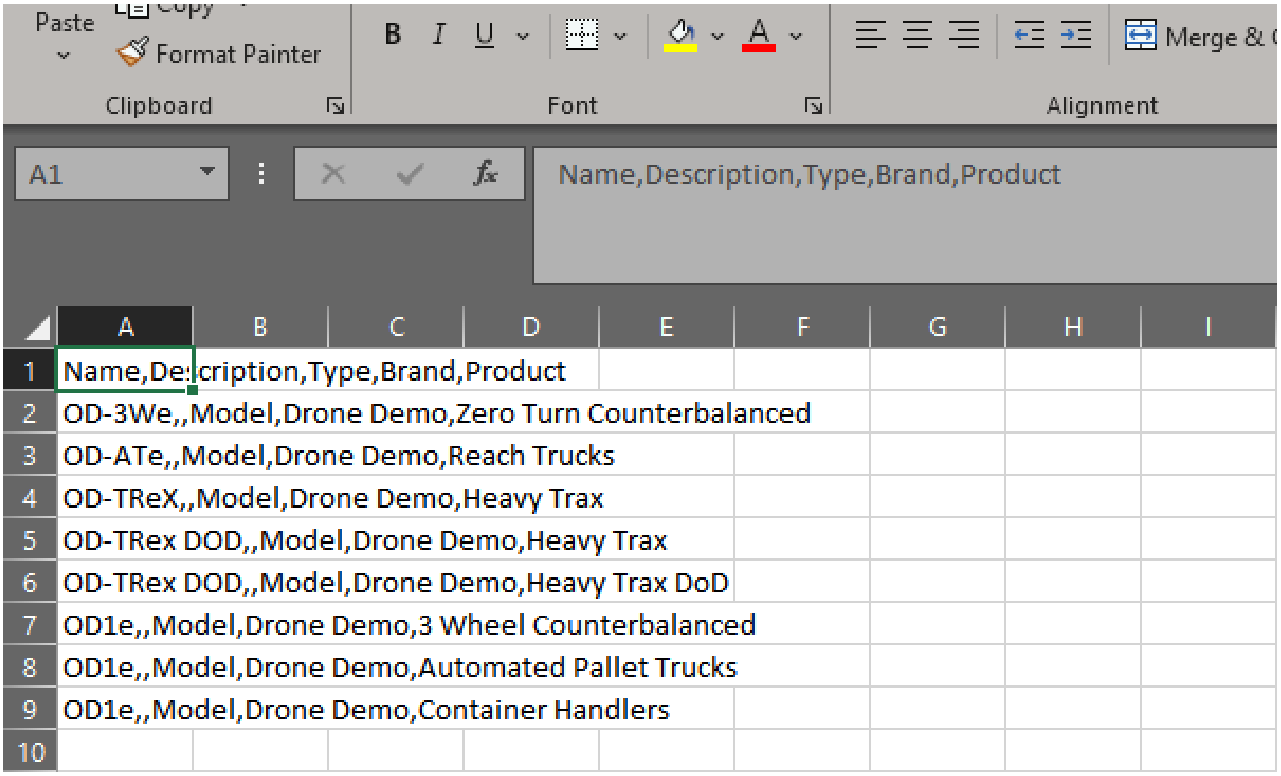


Figure 9-80. .CSV File in Excel

6. To save the .csv file, select Save or Save as to save the file in the desired location.

Pick Lists

Introduction to Pick Lists

For customers configured with access to the shopping cart and pick lists, adding a part to the Shopping Cart adds the part to the pick list that is active. All customers so configured have access to at least one pick list ("Pick List 1" by deftault), however, they can create additional pick lists if needed. Creating multiple pick lists allows users to group parts into separate lists depending on business needs. They can be used to group parts for a specific brand or model, or to create a list for commonly ordered parts. Toggling between pick lists is easy allowing users to work on more than one pick list per session.

Users have access to the shopping cart in the following locations in the ONeSOURCE Client:

- Parts Line Item cards

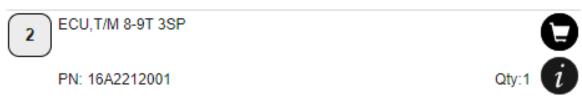


Figure 9-81. Parts Line Item

- Hotspot Flyouts

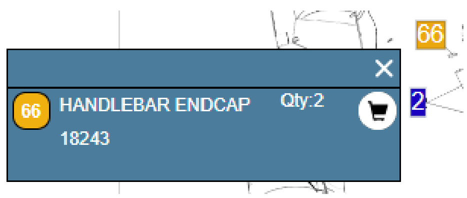


Figure 9-82. Hotspot Flyout

- Supersession section of Line Item Flyout

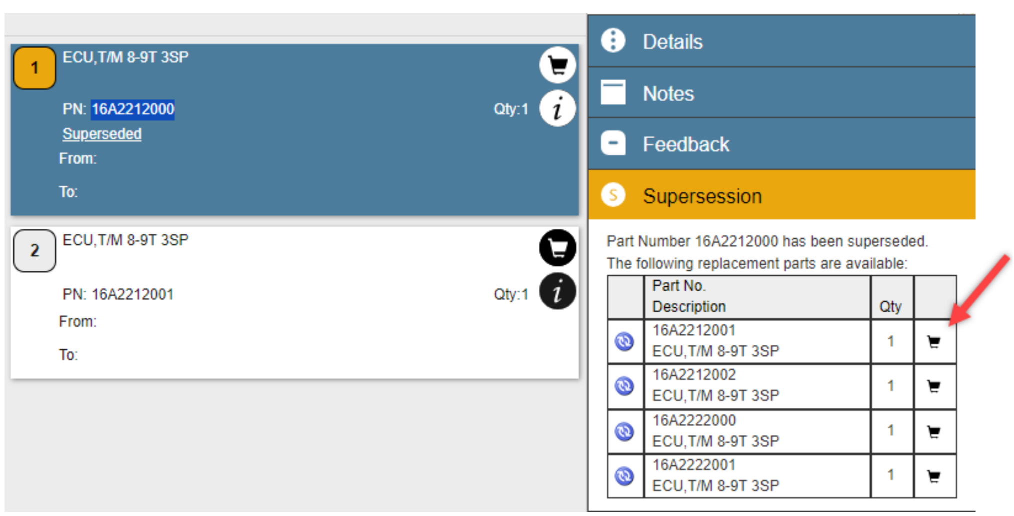
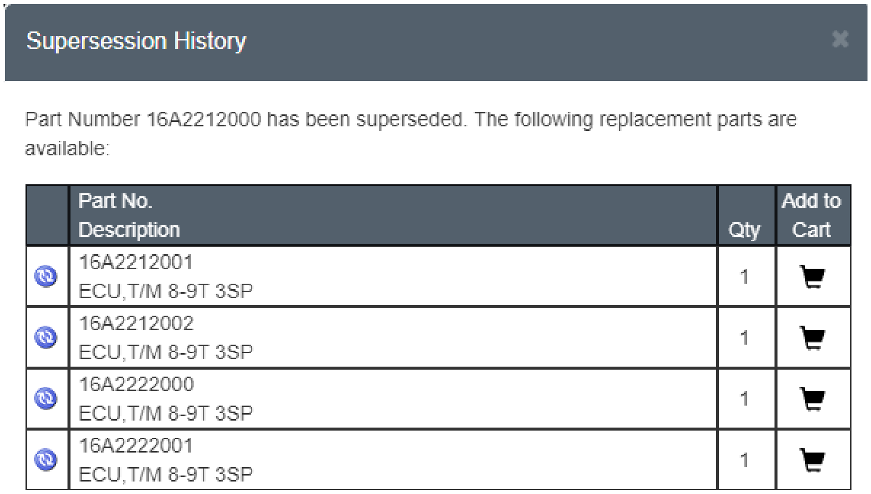


Figure 9-83. Supersession Section

- Supersession Overlays



Supersession History

Part Number 16A2212000 has been superseded. The following replacement parts are available:

	Part No. Description	Qty	Add to Cart
	16A2212001 ECU,T/M 8-9T 3SP	1	
	16A2212002 ECU,T/M 8-9T 3SP	1	
	16A2222000 ECU,T/M 8-9T 3SP	1	
	16A2222001 ECU,T/M 8-9T 3SP	1	

Figure 9-84. Supersession History Overlay

- Parts Details Page

Figure 9-85. Parts Details Page

- Parts cards on search results page

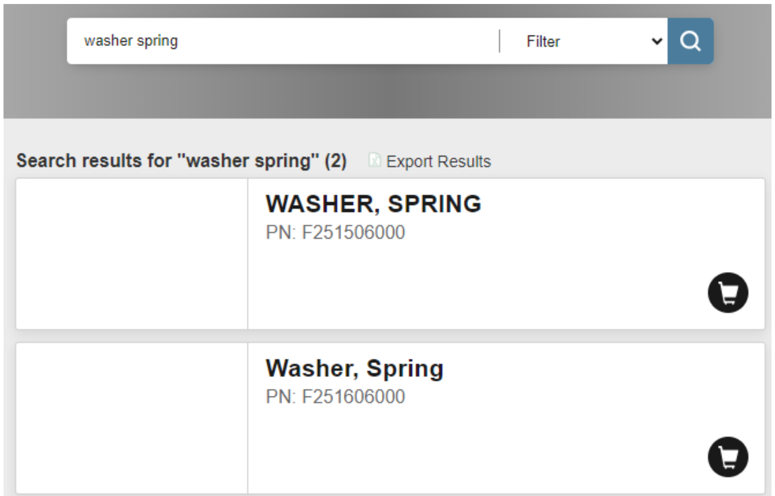


Figure 9-86. Parts Cards - Search Results

- Browse Parts module on the landing/home page

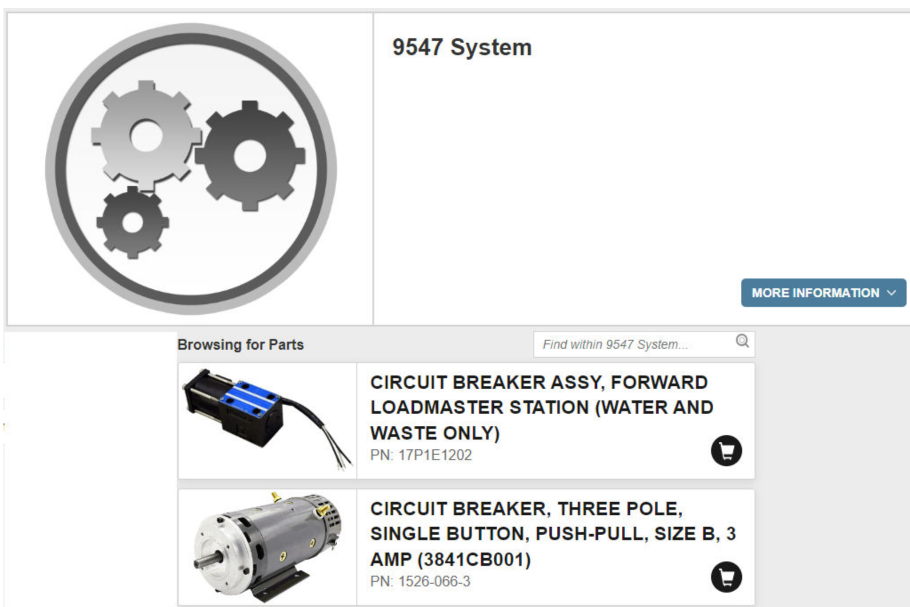


Figure 9-87. Parts Cards - Browse Parts

Pick lists can be viewed via a quick view or a full view via the pick list page. From the full page view, supersession history can be viewed for parts on the pick list that have been superseded and the pick list can be saved as (e.g., copied) a new pick list, e-mailed, or exported.

Pick List Quick View

1. To open a quick view of the pick list, click on the shopping cart icon.

Figure 9-88. Shopping Cart Icon

NOTE: The number shown in the shopping cart represents the number of items (e.g., parts) in the active pick list.

2. The quick view of the active pick list will display.

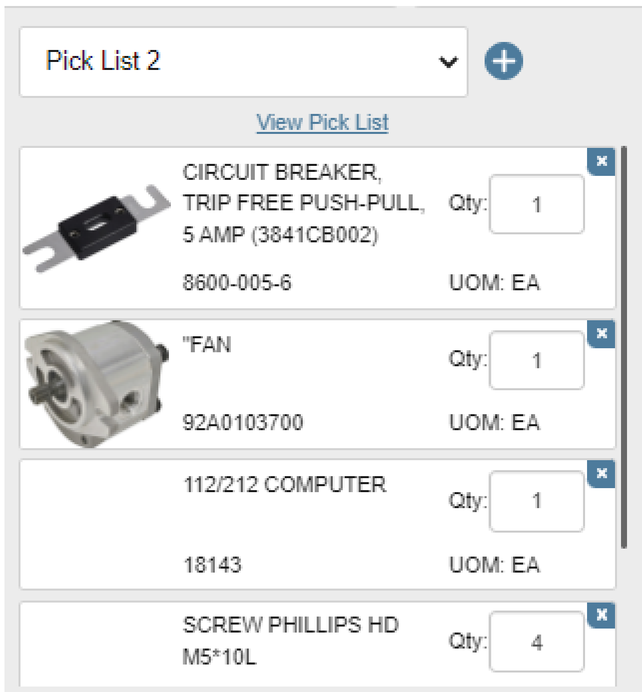


Figure 9-89. Pick List Quick View

NOTE: If there is more than one pick list, a drop-down menu is provided for the user to select the desired list.

3. Parts information is displayed, including images if they are available, for each part that has been added. Parts cannot be added to the pick list from the quick view, but parts can be removed and quantities can be changed.

Pick List Page

4. To open the full pick list page, click on the View Pick List link on the Pick List quick view screen (see above).

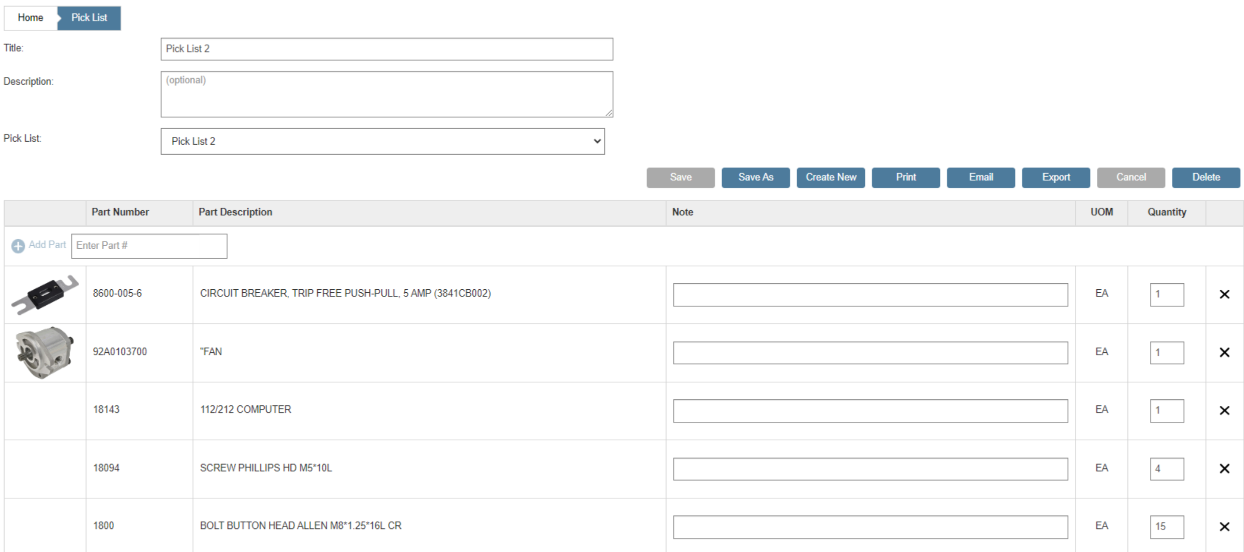


Figure 9-90. Pick List Page

5. Users can do a variety of actions with the selected pick list through a series of buttons that display above the pick list.
6. Pick lists can be created and edited using a desktop PC or portable devices like phones or laptops.

Creating a Pick List

Pick List 1 is the default pick list name created by the system and is initially empty. Users may edit this default name as well as create new pick lists and then switch among them during a session.

To Create a Pick List:

1. Click on the cart icon in the upper right of the screen.

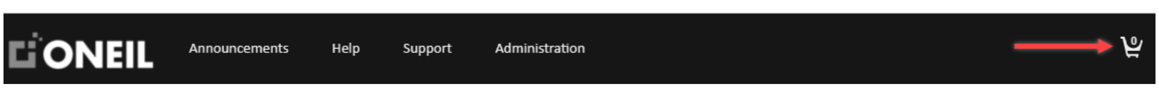


Figure 9-91. Cart Icon

2. If there are no items in the cart, an empty pick list will display.

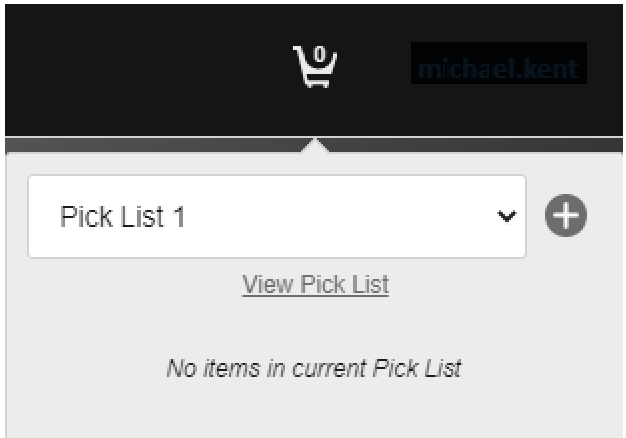


Figure 9-92. Pick List is Empty

NOTE: This display is called the pick list quick view. It shows the default pick list, Pick List 1, that is created by the system.

3. If you already have a pick list that contains items but wish to start a new pick list, click on the plus **+** icon on the right of the pick list drop-down.

Figure 9-93. Click to Create a New Pick List

4. The **Create a New Pick List** pop-up window displays:

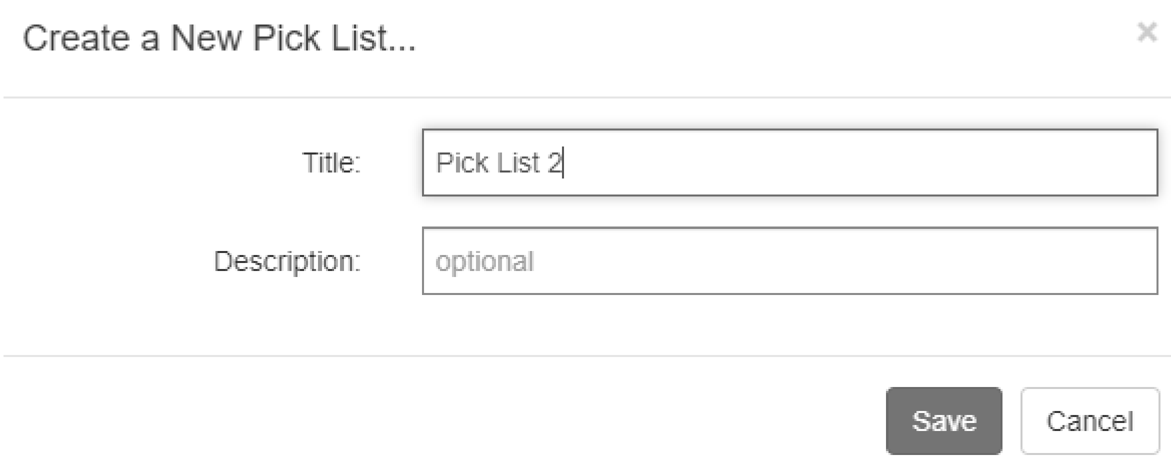


Figure 9-94. Create New Pick List Window

5. Users can enter their own title for the pick list or they can keep the title the system has provided. An optional description can also be entered.
6. Click the **Save** button to save the information and close the pop-up window.
7. The newly created pick list becomes the active pick list until the user switches to a different pick list.
8. To switch to a different pick list, click on the shopping cart icon again to bring up the pick list quick view:

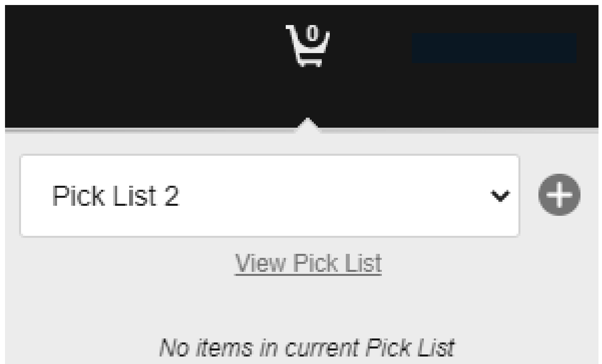


Figure 9-95. Quick List View

9. Click on the down arrow to open the drop-down list and select the desired pick list:

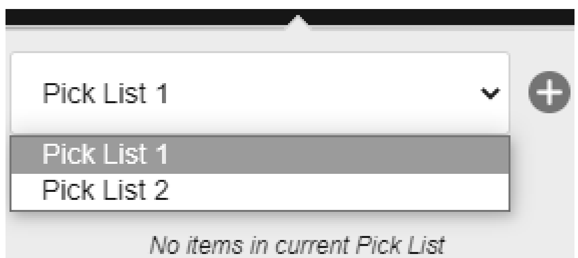


Figure 9-96. Select Desired Pick List

10. The desired pick list now becomes the active pick list and the quick view window will close.

Adding Parts to a Pick List

Remember that while there can be multiple pick lists, only one of them is active at a given time. Users choose the pick list they wish to be active by selecting it from the drop-down list after clicking on the shopping cart icon. Users should be aware that all parts added to the shopping cart icon will be added to the active pick list until they choose another pick list to become the active one.

Add a Part to a Pick List:

1. Open a Parts Publication. Refer to Parts Publications for more details.
2. The system displays the parts corresponding to the selected parts list.

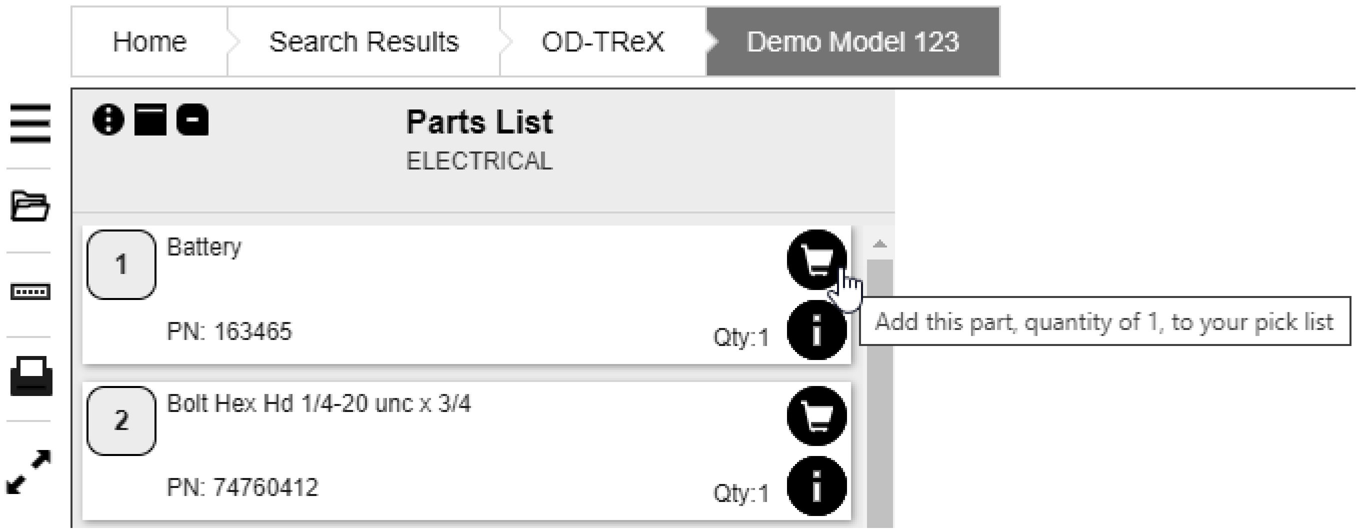


Figure 9-97. Parts List Line Items

3. Click the shopping cart icon to the right of the part to add it to the pick list. A confirmation pop-up will display briefly after each part is added.
4. The counter inside the shopping cart icon at the top of the browser will display the total number of parts that have been added to the pick list and will increment by one each time a new part is added.

Figure 9-98. Shopping Cart Icon

5. Repeat the process to add more parts to the pick list.

Add a Part to a Pick List from the Pick List Page

1. Select the desired pick list by clicking on the shopping cart icon at the top of the browser. Use the drop-down list to select the desired pick list if more than one pick list exists.
2. Click on the View Pick List on the pick list quick view.

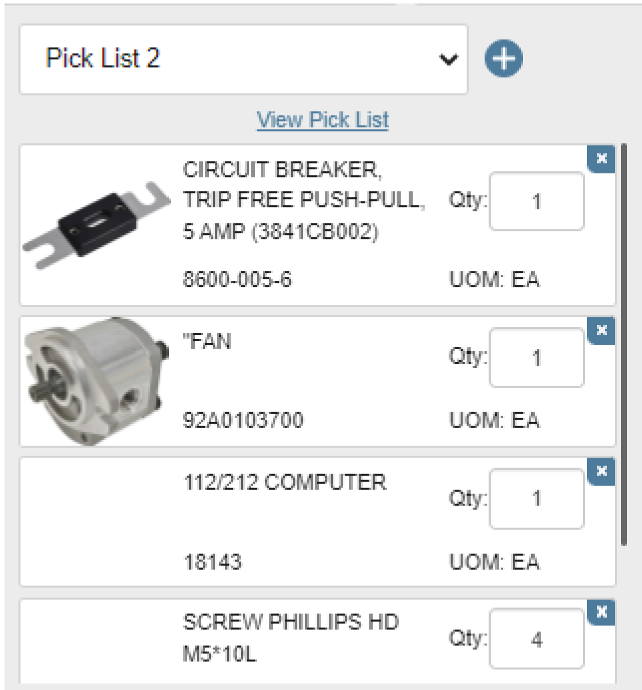


Figure 9-99. Pick List Quick View

3. The Pick List page opens.

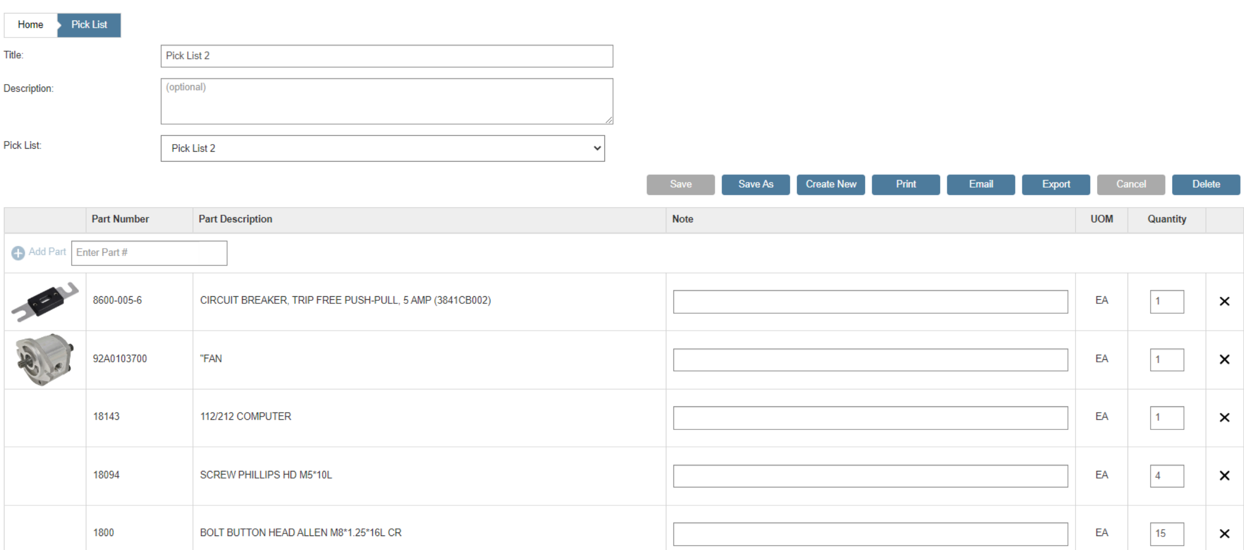


Figure 9-100. Pick List Page

4. There are two ways to add parts to a pick list from the Pick List page:
   a. Clicking on a part description for a part that is already on the pick list.
   b. Entering the master part number in the **Enter Part #** window and then clicking the **+ Add Part** button.

Adding a Part to a Pick List by Clicking on Part Description

1. Click on the part description (it will be linked if the part is a master part).
2. The Part Details page will display.
3. Select the desired source.
4. Open the parts lis.
5. Follow the steps to add a part to a pick list from a parts list.

Adding a Part by Entering a Part Number

1. Enter the part number in the **Enter Part #** window.

NOTE: The part entered must be a master part for it to be found by the system. After entering the master part, the **+ Add Part** button should become active.

2. Click the **+ Add Part** button.
3. The part is added to the pick list.

Removing Parts from a Pick List

NOTE: Once a part is removed from a Pick List, it cannot be undone. Users must either add the part number to the list again, or find the part on a parts list and add it back to the selected pick list.

To Remove a Part from the Pick List Quick View

1. Click on the shopping cart icon at the top right of the browser and select the desired pick list.

Figure 9-101. Select Desired Pick List

2. Click on the x that appears to the right of the part:

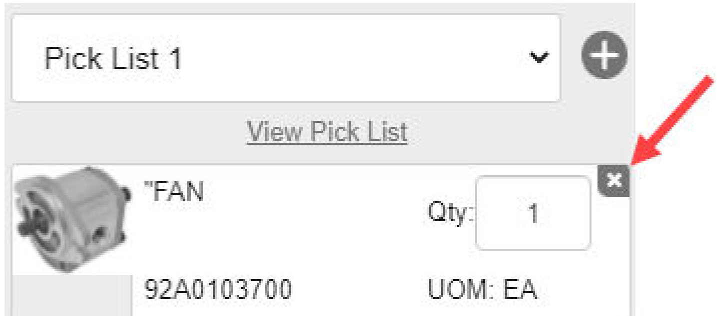


Figure 9-102. Remove Item from Pick List

3. A confirmation pop-up will appear. Click Yes to confirm the removal.
4. The part is removed from the pick list.

To Remove a Part from the Pick List Page

1. Click on the shopping cart icon at the top right of the browser and select the desired pick list:

Figure 9-103. Select Desired Pick List

2. Click on View Pick List to open the Pick List Page.

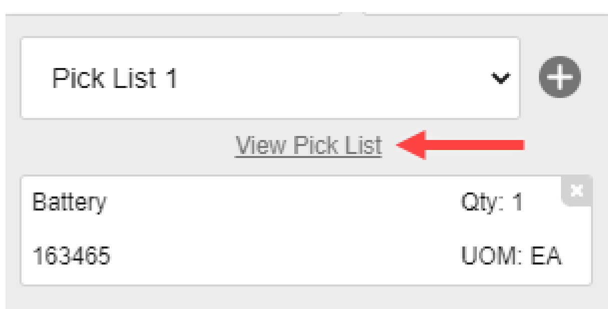


Figure 9-104. Open Pick List Page

3. Click on the x that appears to the right of the quantity box.

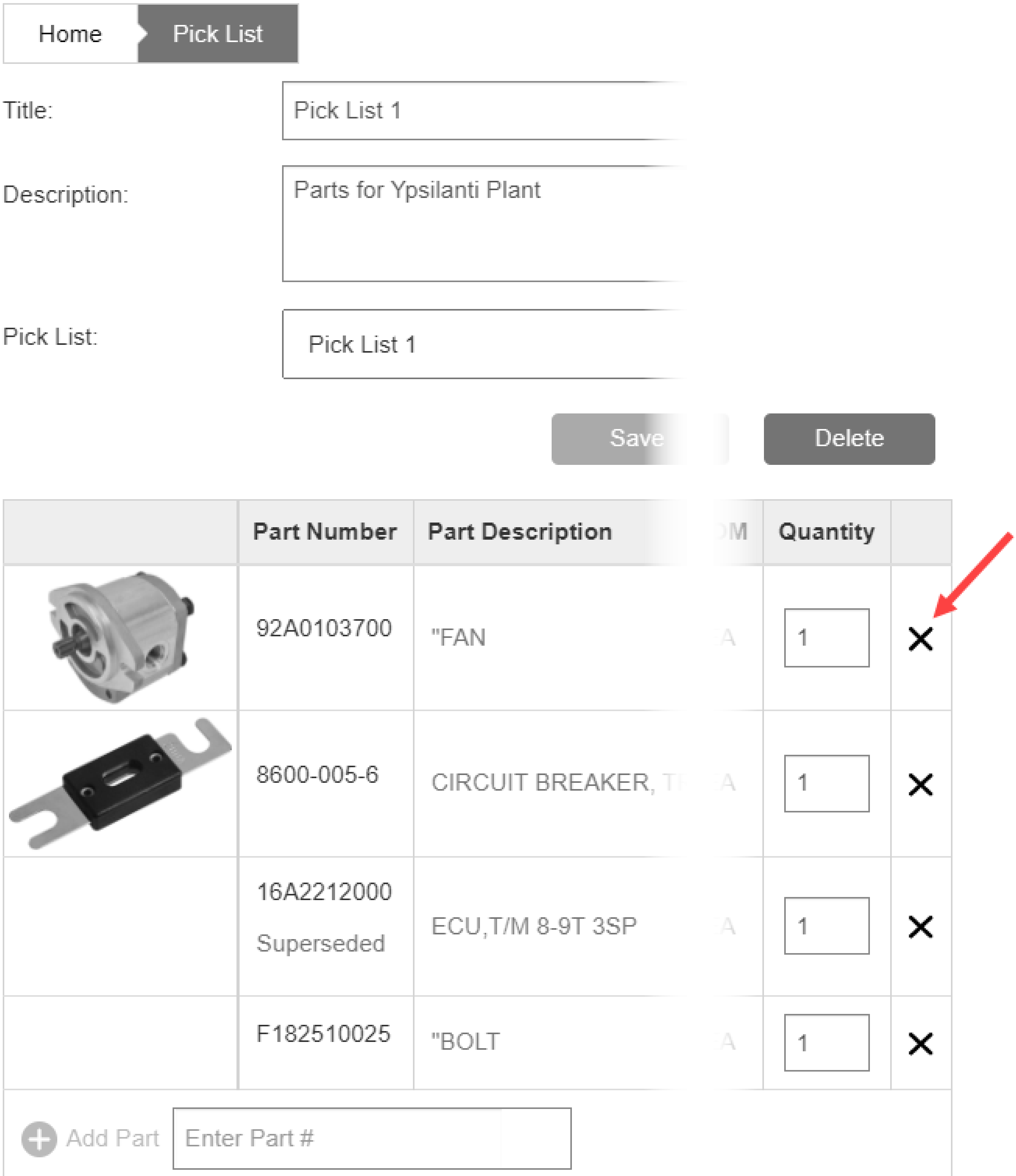


Figure 9-105. Remove Item from Pick List

4. There is no confirmation pop-up to confirm the removal. The part is removed immediately; however, a warning appears to let you know that the change to the pick list has not been saved.

Figure 9-106. Warning

5. Click the Save button to save your changes.
6. Any changes made to the pick list, including the part removal, are saved.
7. To undo a part removal prior to clicking the Save button, click on another part of the ONeSOURCE Client such as the Home tab, the shopping cart in the upper right of the browser, or the View Pick List link. A pop-up message will appear asking you if you want to leave the page. Click the Leave button to exist the pick list page and discard your changes.

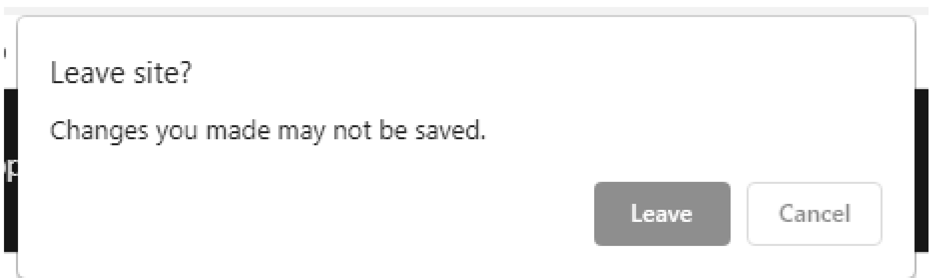


Figure 9-107. Confirmation Message

8. To undo a part removal after clicking the Save button, you'll need to add the part number to the pick list again, if known, using the + Add Part button on the pick list page or go to the desired parts list and add it to the pick list.

Figure 9-108. + Add Part Number Window

Using the "Save As" Function

To Print a Pick List

NOTE: Pick lists can only be printed from the pick list page.

1. Click on the shopping cart icon in the upper right of the browser. The pick list quick view will open.

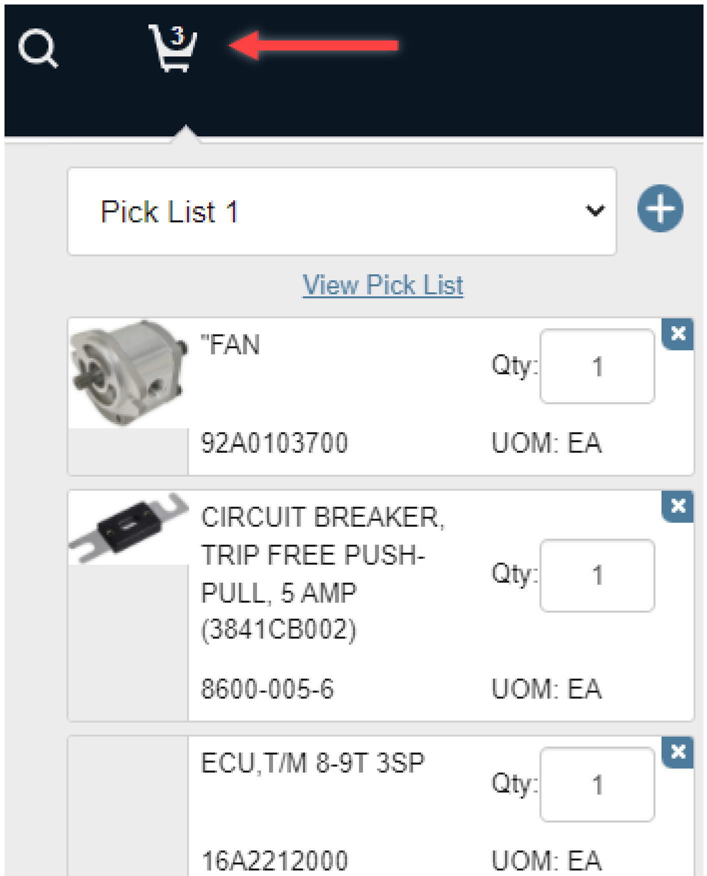


Figure 9-109. Pick List Quick View

2. Select the desired pick list, using the drop-down list if needed.
3. Click on View Pick List to open the pick list page.

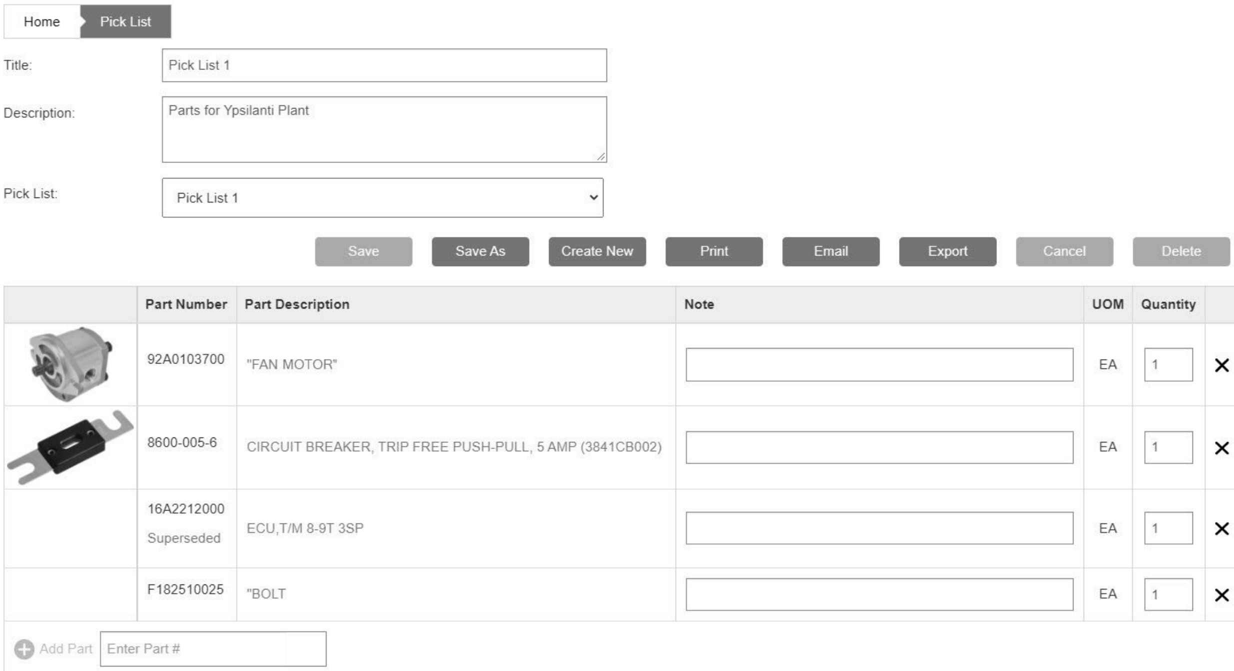


Figure 9-110. Pick List Page

4. Click on the **Print** button on the pick list page.

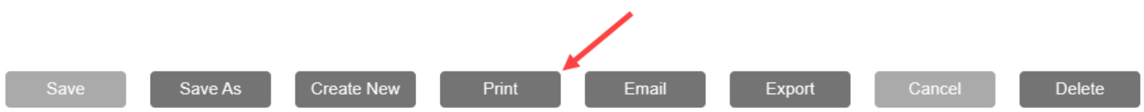


Figure 9-111. Pick List Page

5. A print preview window will open.
6. Check the print settings and then click the **Print** button.

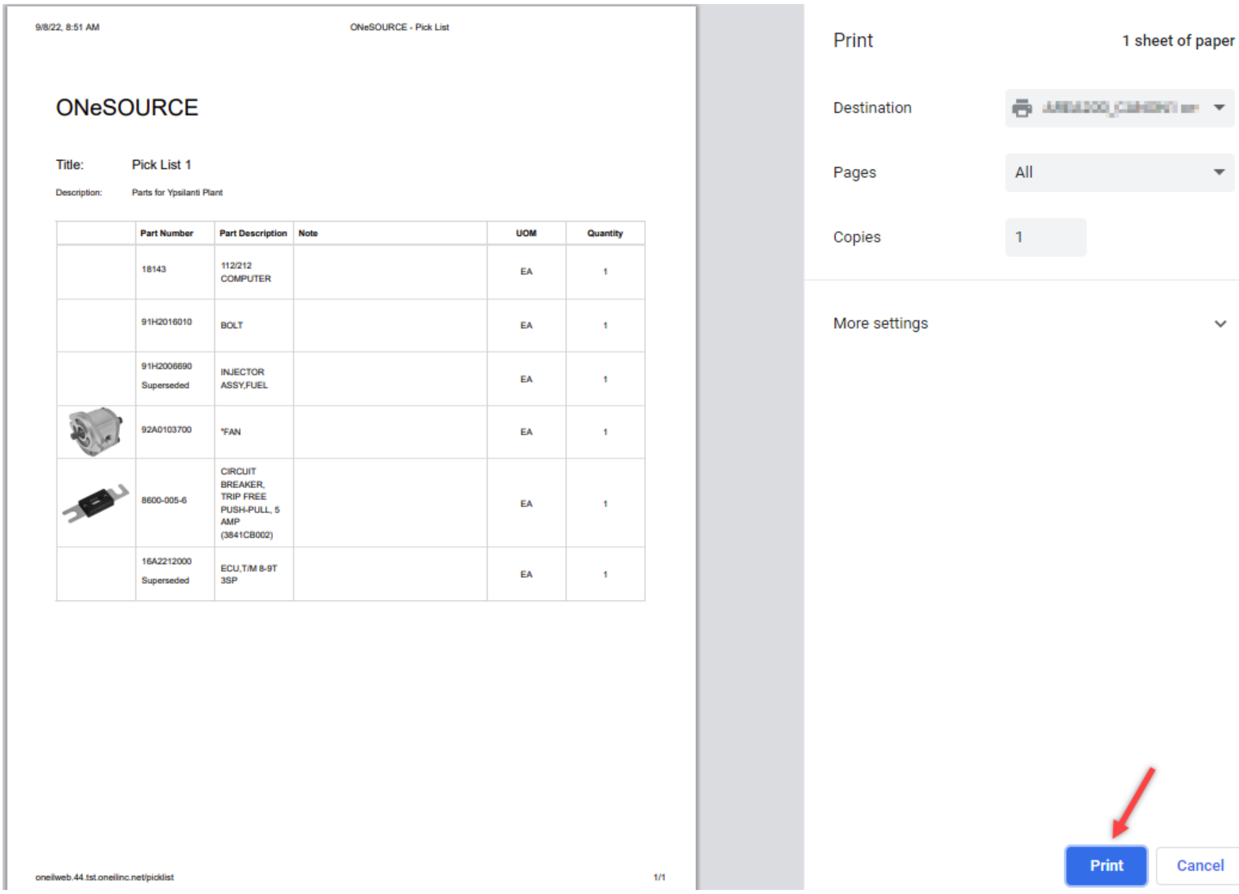


Figure 9-112. Print Preview Page

NOTE: Printing on portable devices is not currently supported.

Printing a Pick List

To Print a Pick List

NOTE: Pick lists can only be printed from the pick list page.

1. Click on the shopping cart icon in the upper right of the browser. The pick list quick view will open.

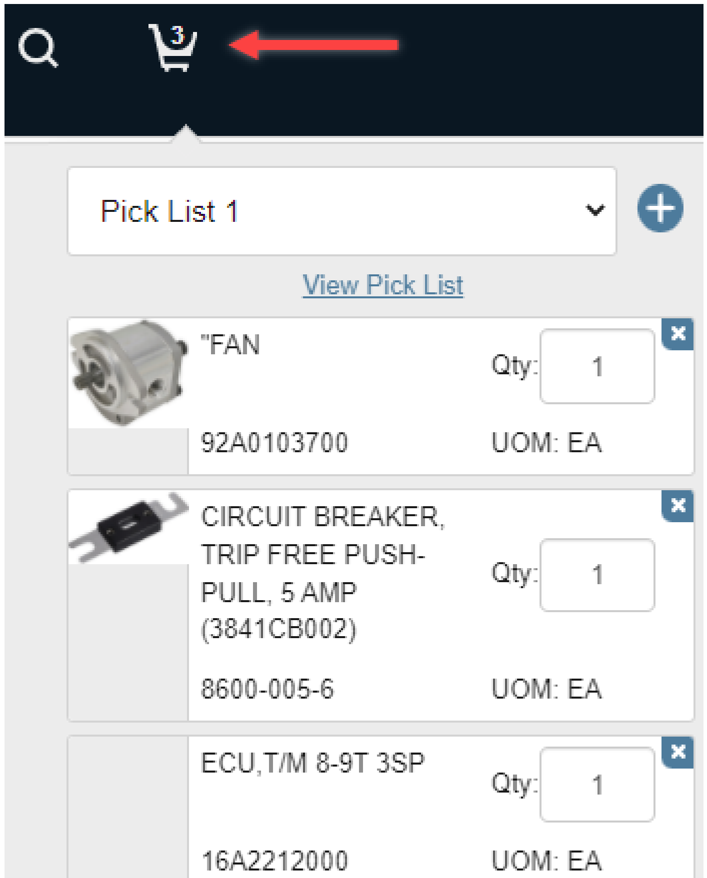


Figure 9-113. Pick List Quick View

2. Select the desired pick list, using the drop-down list if needed.
3. Click on View Pick List to open the pick list page.

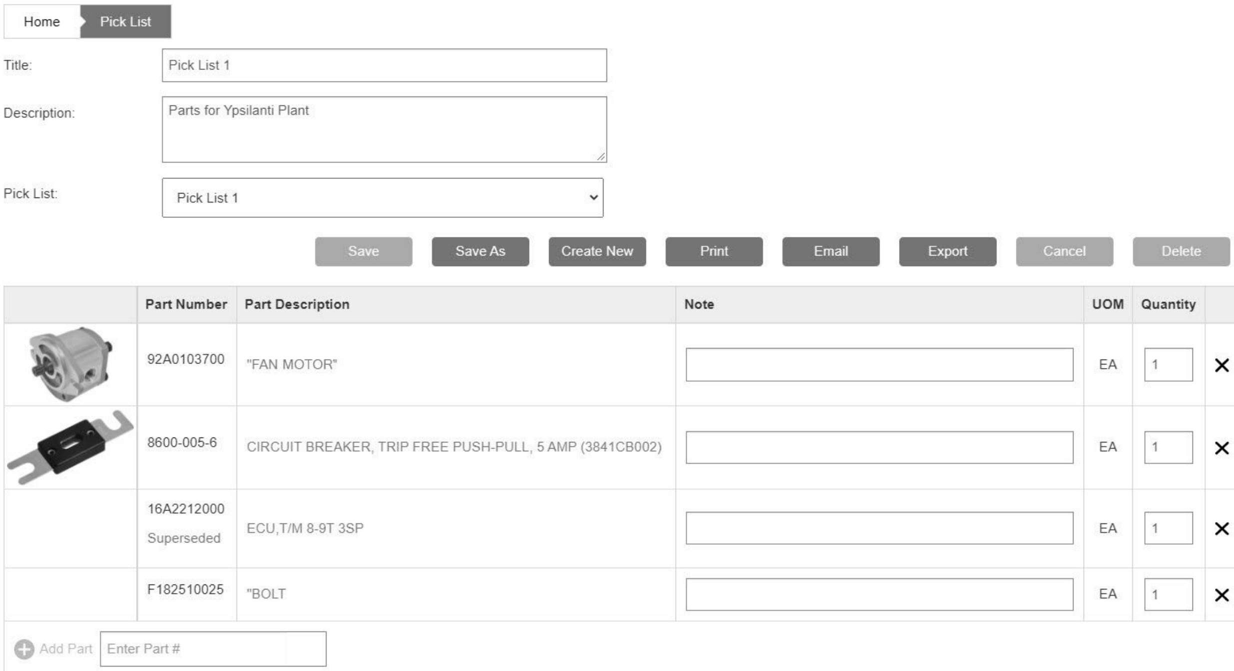


Figure 9-114. Pick List Page

4. Click on the **Print** button on the pick list page.

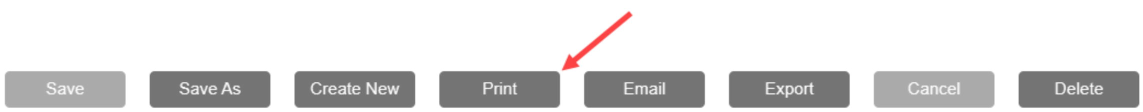


Figure 9-115. Pick List Page

5. A print preview window will open.
6. Check the print settings and then click the **Print** button.

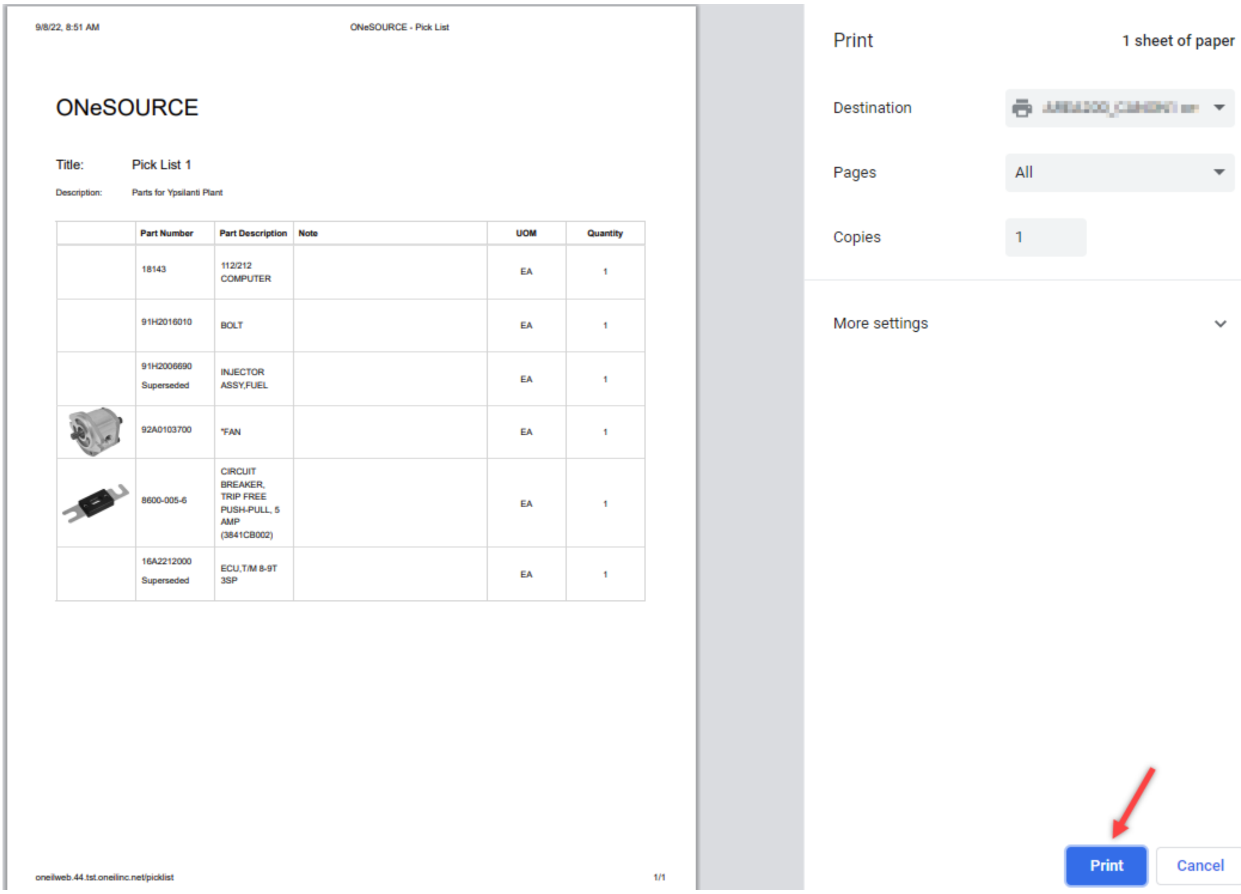


Figure 9-116. Print Preview Page

NOTE: Printing on portable devices is not currently supported.

E-mailing a Pick List

To E-mail a Pick List

Users can e-mail a pick list to themselves or others from the pick list page. The pick list will appear in the body of the e-mail and also as a .csv file attachment.

1. Click on the shopping cart icon at the upper right of the browser.

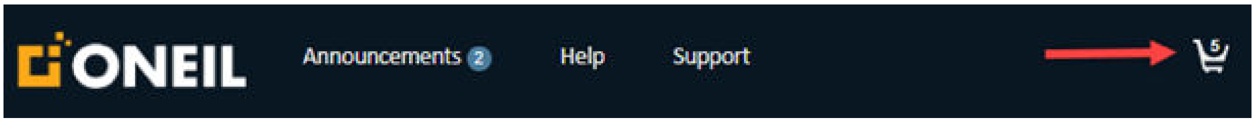


Figure 9-117. Shopping Cart Icon

2. Select the desired pick list using the drop down list.

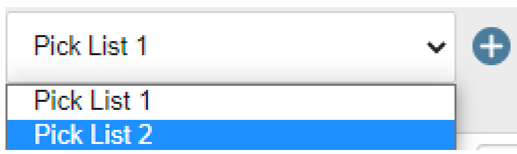


Figure 9-118. Select Pick List

3. Click on View Pick List to open the pick list page.

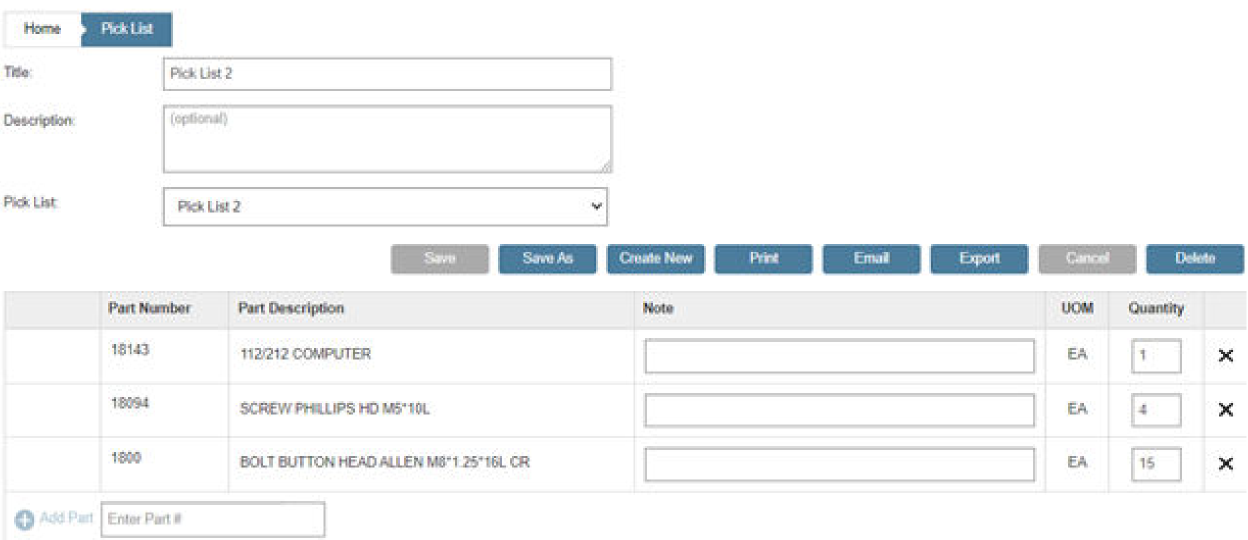


Figure 9-119. Pick List Page

4. Click on the **E-mail** button on the pick list page.

Figure 9-120. E-Mail Button

5. The Send Pick List window will open.

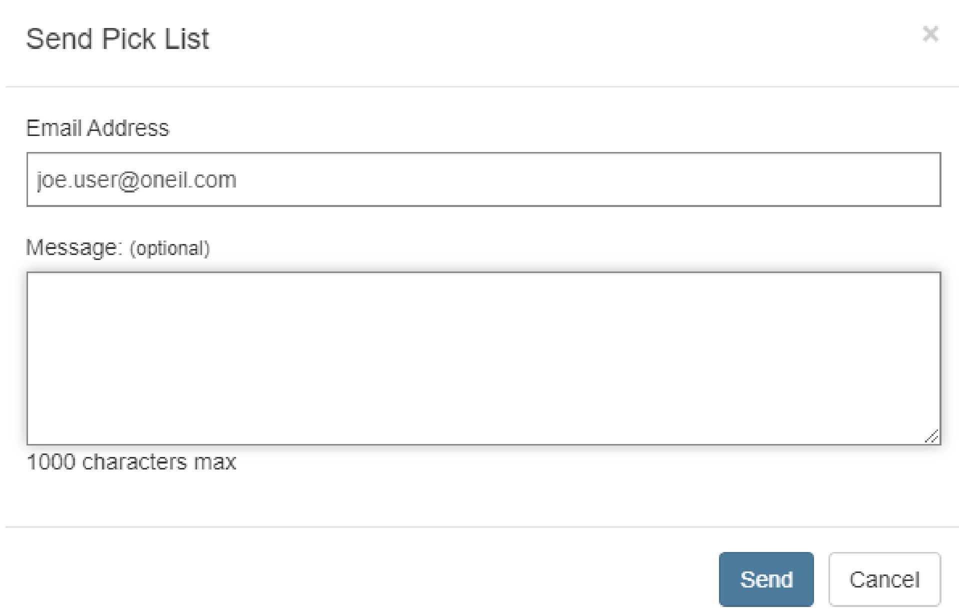


Figure 9-121. Send Pick List Window

6. Enter a valid e-mail address and optional message.

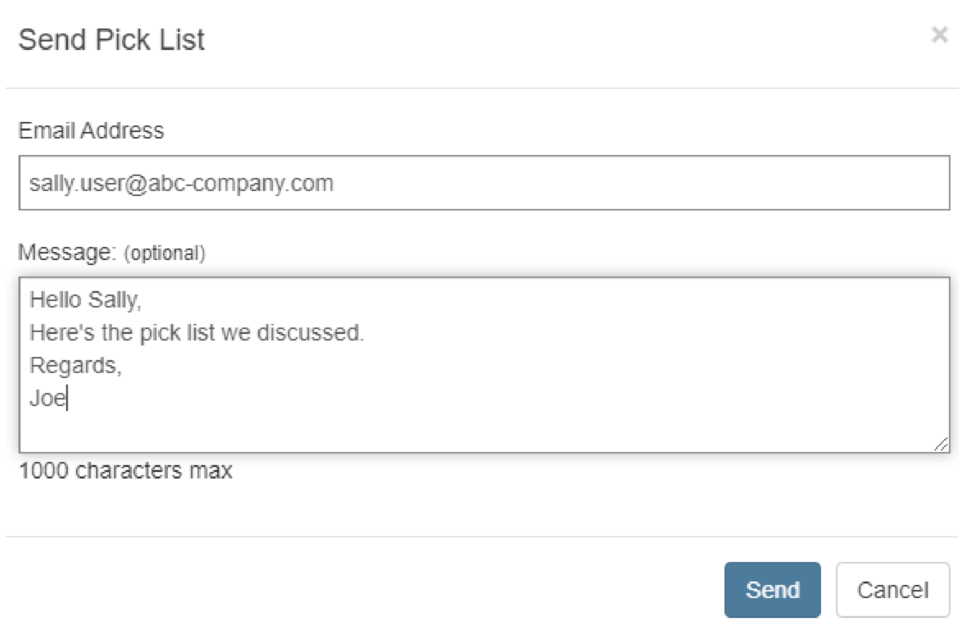


Figure 9-122. Enter E-Mail and Optional Message

NOTE:

a. Only one e-mail address can be entered.

b. Be careful not to hit the Enter key instead of the Send button while in the middle of composing your message as doing so will send the pick list to the e-mail recipient immediately.

7. Click on the **Send** button when ready.
8. A confirmation pop-up message will display on the screen and an e-mail with the pick list file attached will be sent to the e-mail address entered.

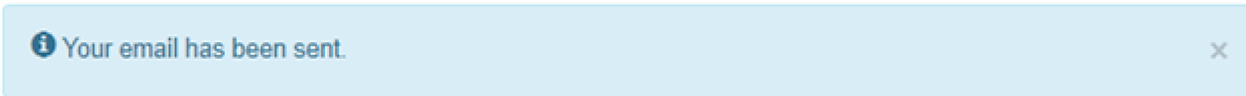


Figure 9-123. Confirmation Message

9. The attached pick list will contain the line items without images.

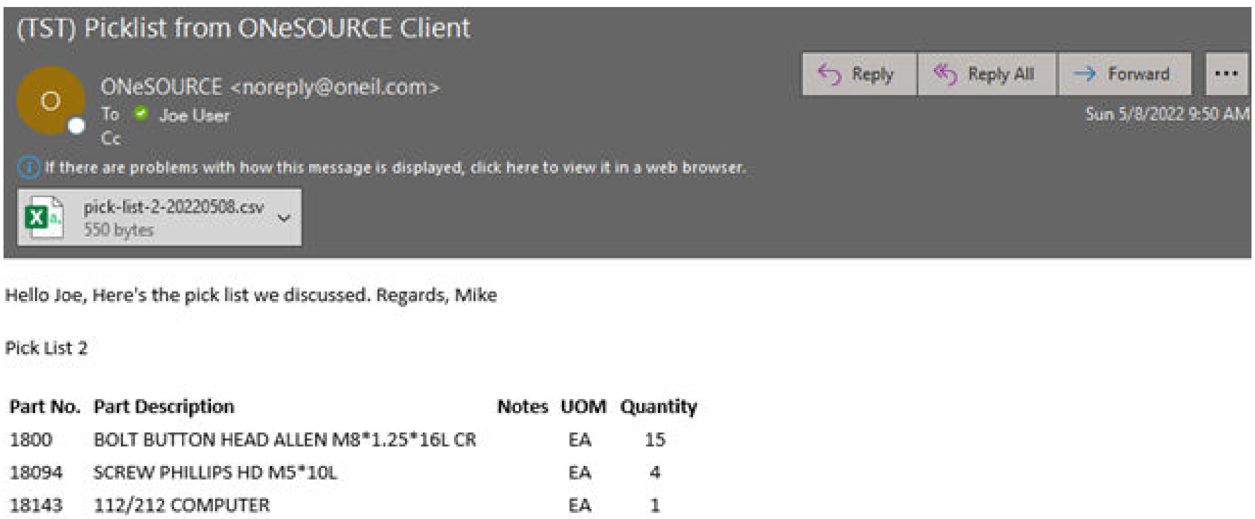


Figure 9-124. Pick List E-Mail

Exporting a Pick List

To Export a Pick List

NOTE: Pick lists may be exported to Microsoft Excel only.

1. Go to the desired Pick List page.

2. Click on the **Export** button on the pick list page.

Figure 9-125. Export Button

3. The download will begin immediately and display in the bottom left corner of the browser.

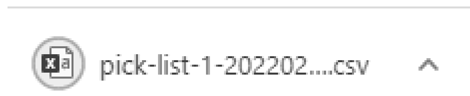


Figure 9-126. Downloaded File

4. Use the up arrow to the right of the exported pick list to reveal display options.

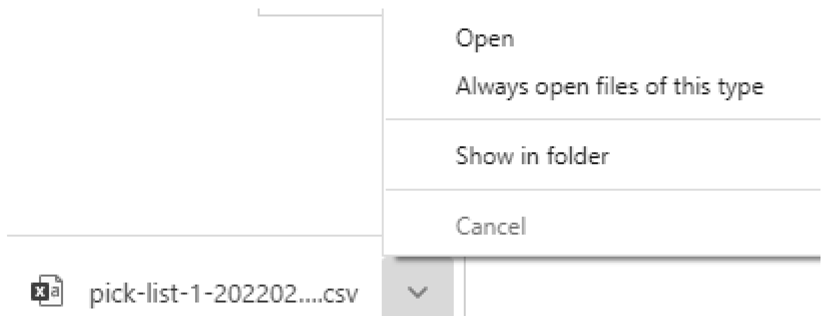


Figure 9-127. Display Options

5. Exported pick lists may also be found in the Downloads folder of the user's local machine.

6. Here is what an exported version of the pick list above looks like in an Excel spreadsheet.

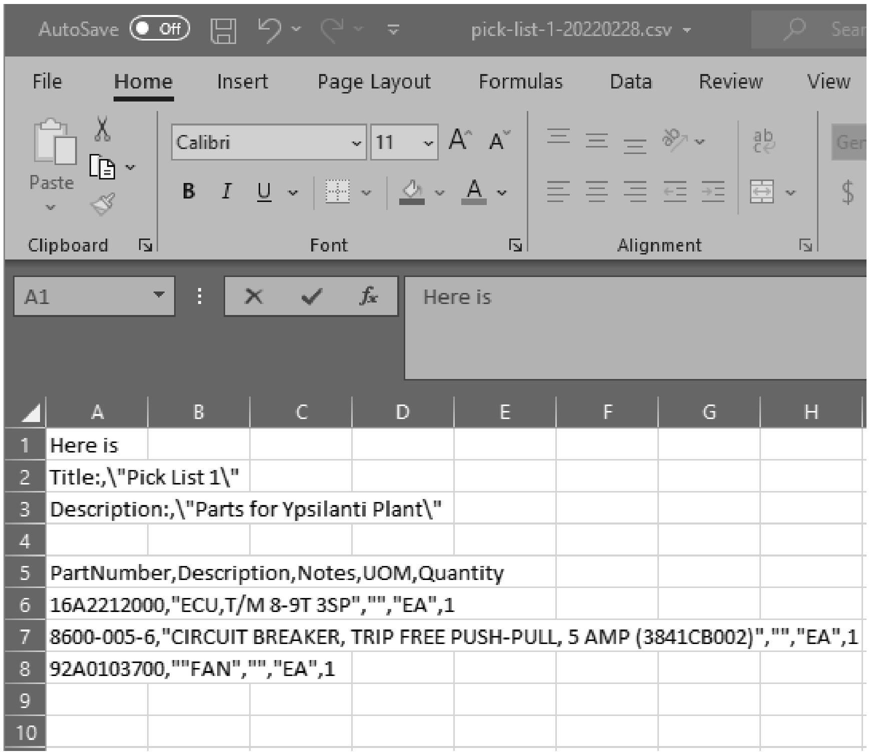


Figure 9-128. Pick List Output

Deleting a Pick List

NOTE:

a. Once a pick list has been deleted, it cannot be recovered. Users can only delete a pick list when more than one pick list is available. The system keeps one of the remaining pick lists as the default.

b. Pick lists can only be deleted from the pick list page.

1. Click on the shopping cart icon in the upper right of the browser. The pick list quick view will open.

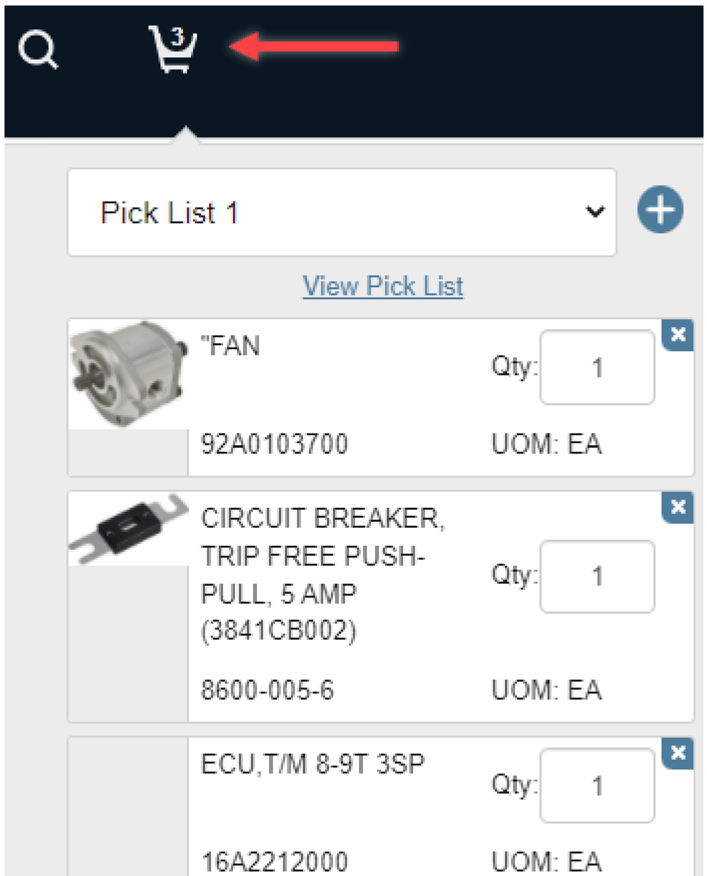


Figure 9-129. Pick List Quick View

2. Select the desired pick list, using the drop-down list if needed.

3. Click on View Pick List to open the pick list page.

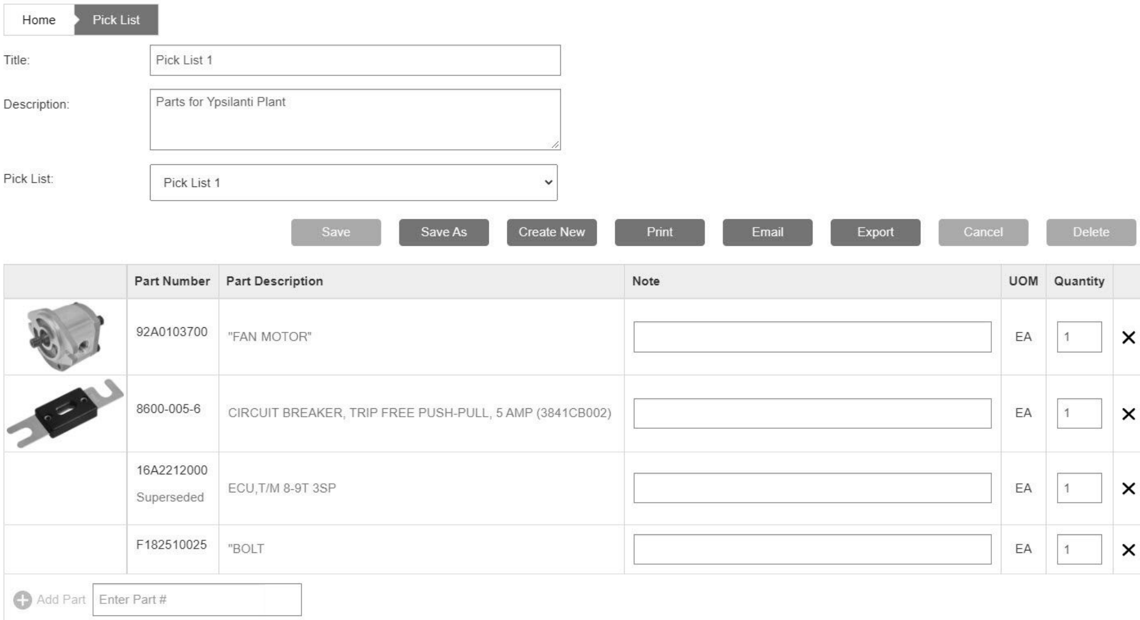


Figure 9-130. Pick List Page

4. Click on the **Delete** button on the pick list page:

Figure 9-131. Delete Button

5. A pop-up window will open.

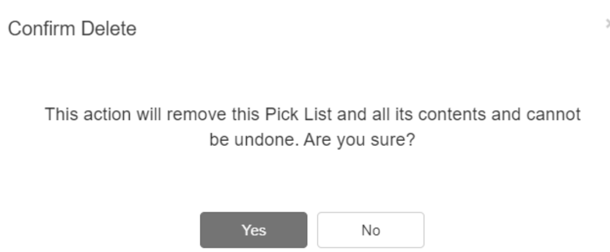


Figure 9-132. Delete Pop-Up Window

6. Click Yes to delete the pick list. When it has been deleted, the next available pick list page will display in its place.

Knowledge Models & Diagnostic Troubleshooting Publications

How to Use a Knowledge Model

Knowledge Model sources appear with the following content type thumbnail image.

Figure 10-1. Knowledge Model Thumbnail Image

Knowledge Model publications will appear under Diagnostic and Troubleshooting sources as shown below.

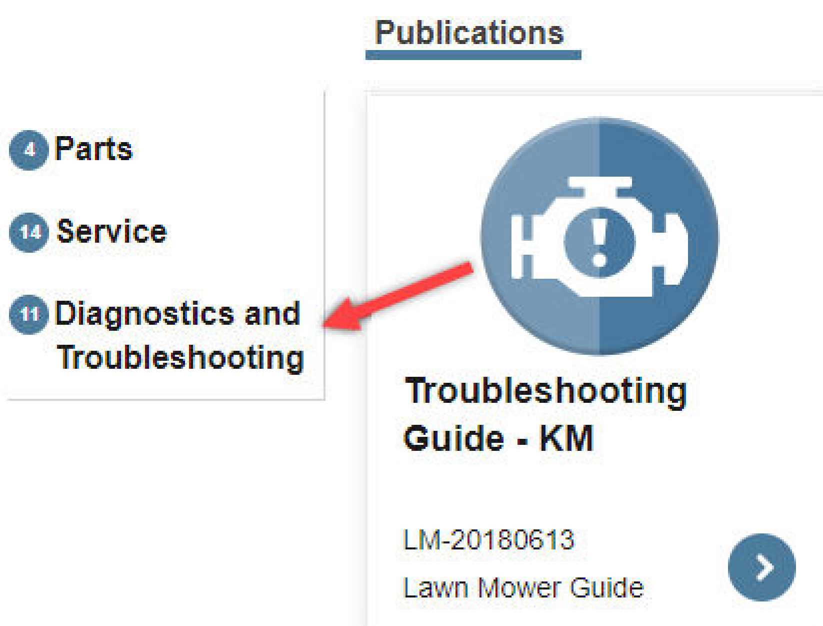


Figure 10-2. Diagnostic and Troubleshooting Sources

1. Select the desired Knowledge Model publication.

2. The Knowledge Model opens and the troubleshooting process begins.

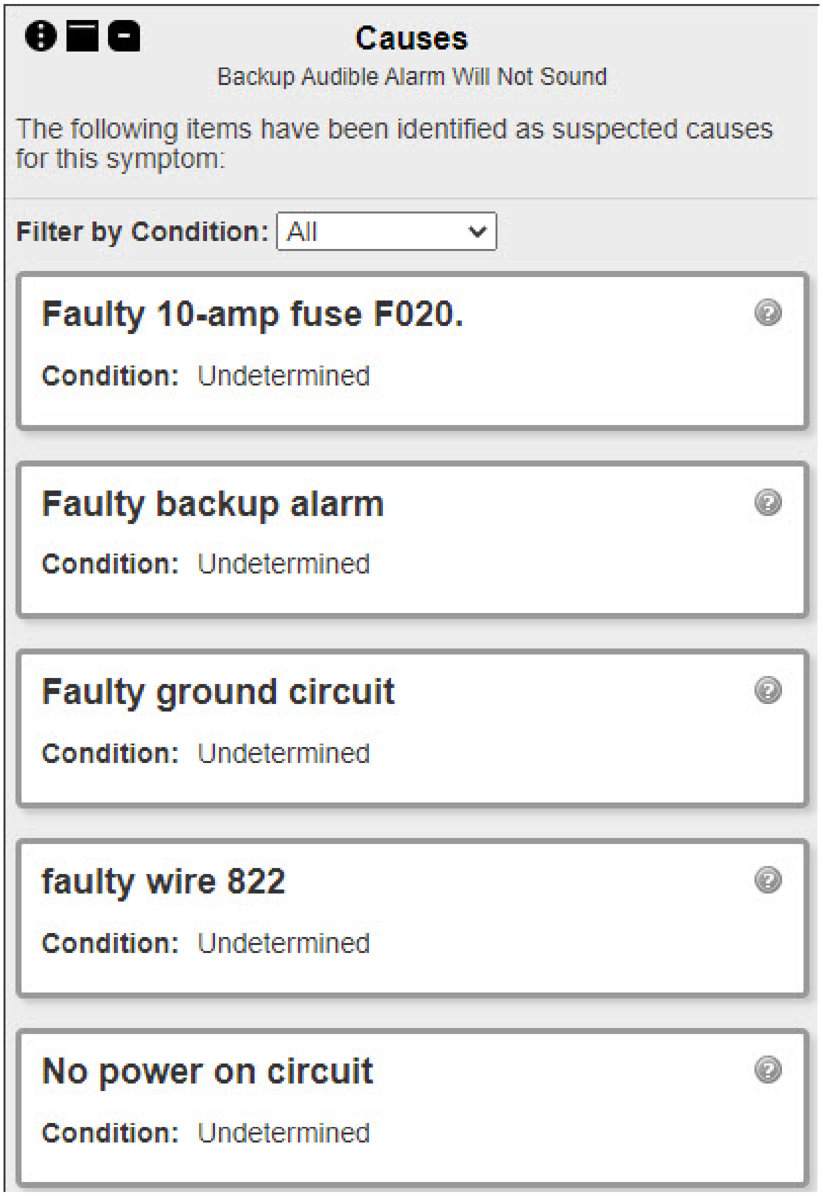


Figure 10-3. Knowledge Model Session

NOTE: Prior to starting the Knowledge Model session, all conditions for the causes are shown as Undetermined. Once you start going through the Knowledge Model steps, these conditions will change to Believed Bad or Believed Good, based on the answer the user provided.

3. Use the Find within search field at the top right of the page to search for data within the Knowledge Model.

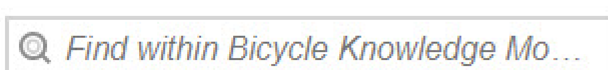


Figure 10-4. Find Within

4. Perform each test when prompted and select your result.

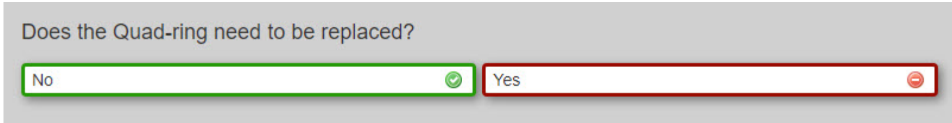


Figure 10-5. Sample Test Question

5. Click on the **Back** button at the bottom right of the page to return to a prior step. Click on the **End** button to end your Knowledge Model session.

Figure 10-6. Back and End Buttons

6. As you progress through the Knowledge Model, the condition status will update for each suspected cause in the list based on your responses.

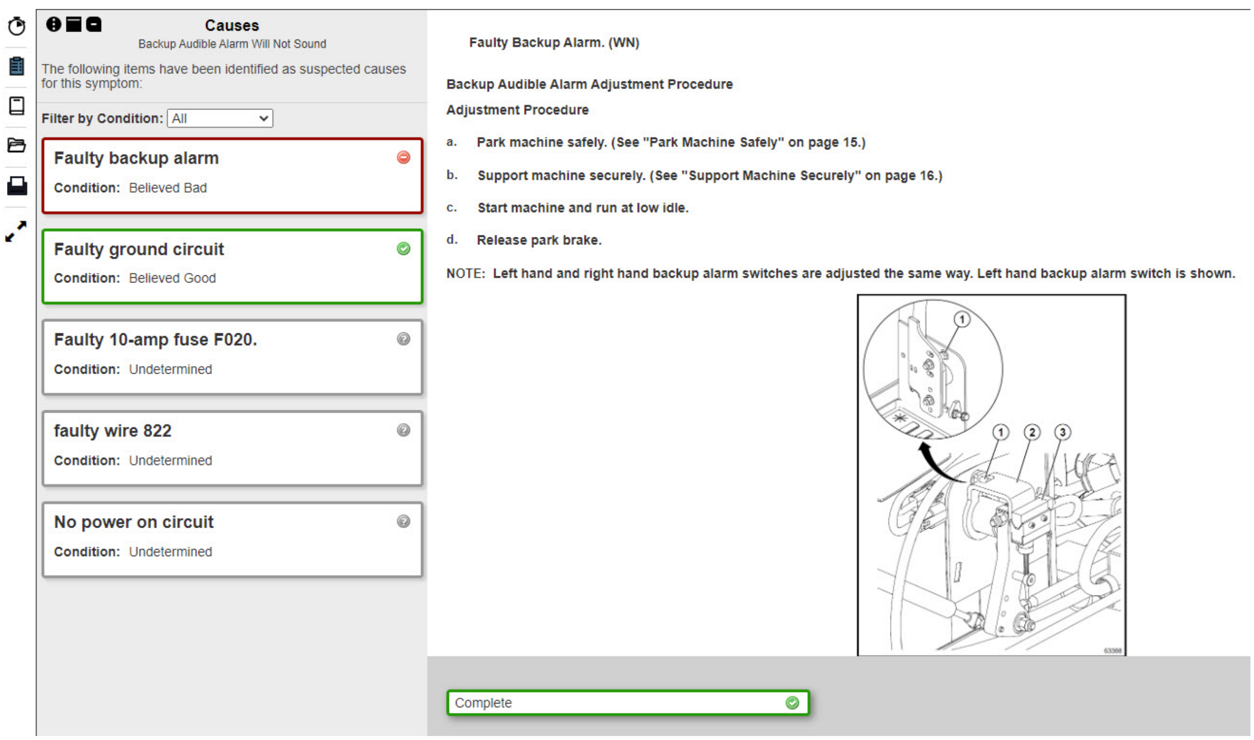


Figure 10-7. Updated Condition Status

7. Use the **Filter by Condition** drop-down menu to filter the list of suspected causes.

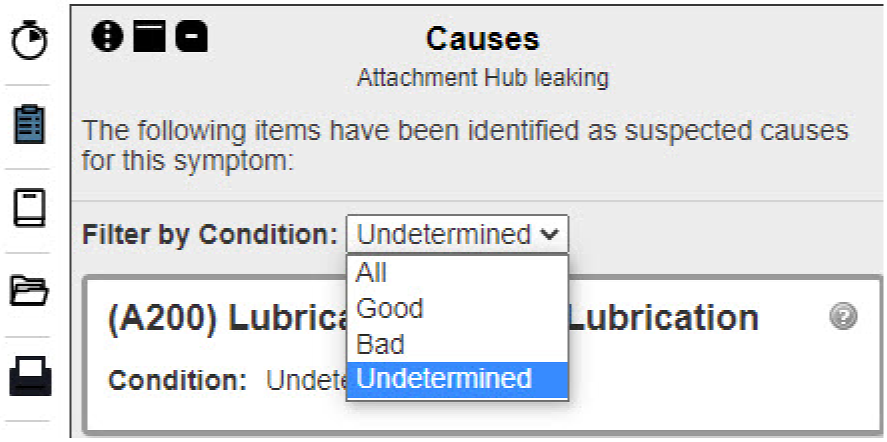


Figure 10-8. Filter by Condition Drop-Down

8. Once a cause has been identified, perform the action requested and click on the **Complete** button.

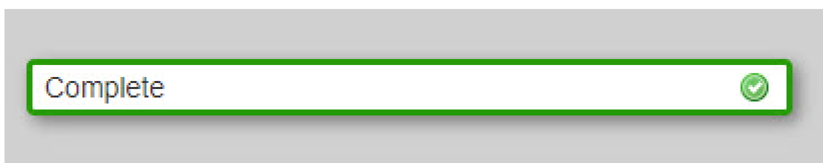


Figure 10-9. Complete Button

9. When there are no more tests/questions to answer, and the issue has been resolved, a confirmation pop-up message will be displayed.

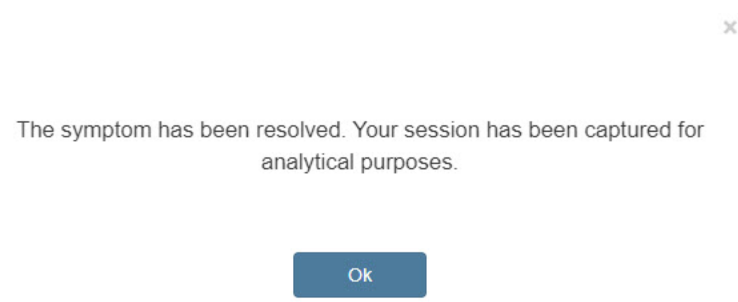


Figure 10-10. Confirmation Pop-Up Message

How to Use a Diagnostic Troubleshooting Publication

Diagnostic Troubleshooting sources appear with the following content type thumbnail image.

Figure 10-11. Diagnostic Troubleshooting Thumbnail Image

They will appear under Diagnostic and Troubleshooting sources as shown below.

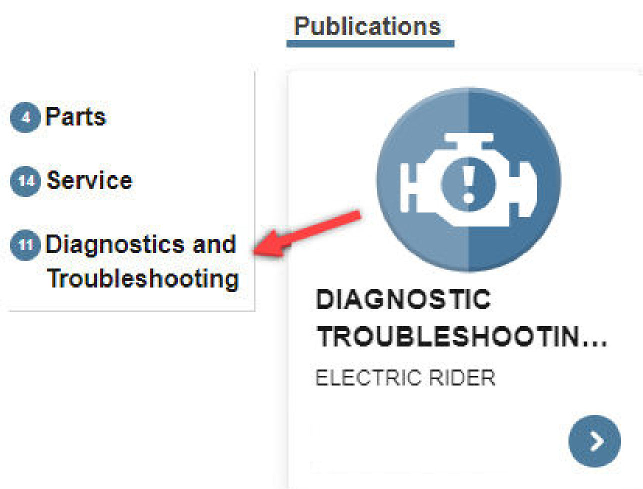


Figure 10-12. Diagnostic and Troubleshooting Sources

1. Select the Diagnostic Troubleshooting publication.
2. Select one of the diagnostic troubleshooting codes.

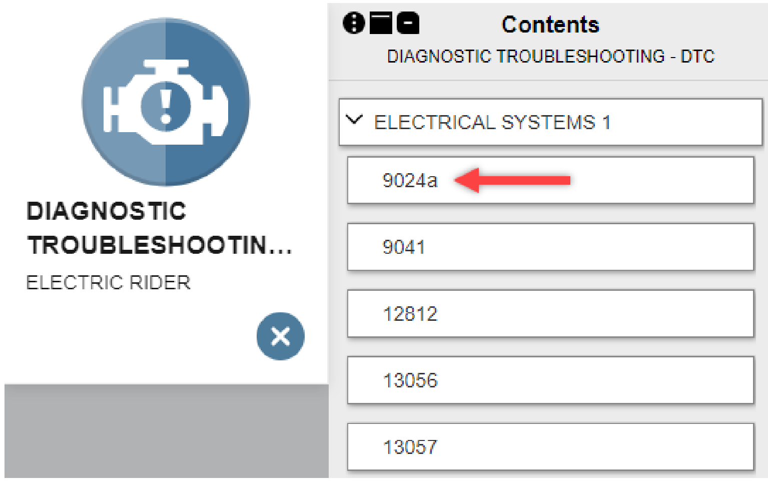


Figure 10-13. Diagnostic Troubleshooting Codes

3. The viewer displays a list of possible causes and starts the session.

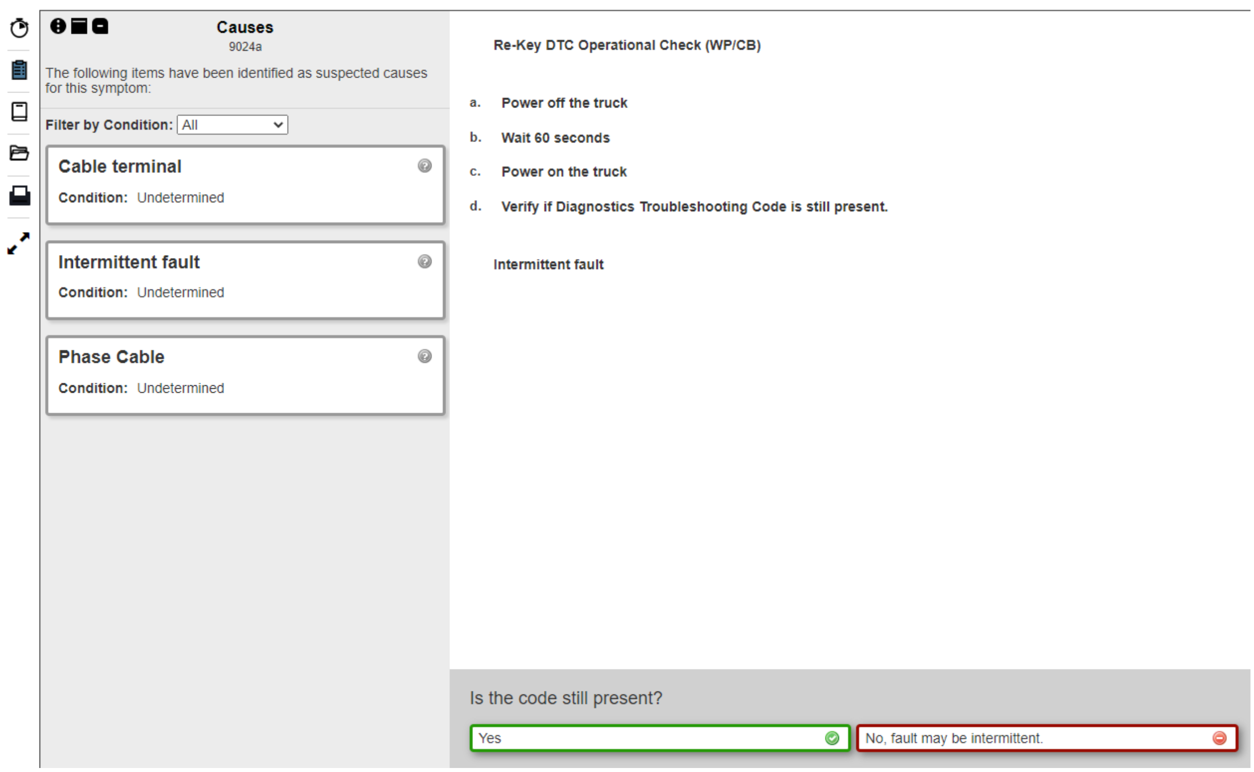


Figure 10-14. Possible Causes

NOTE: Prior to starting the diagnostic troubleshooting session, all of the conditions for the causes are shown as Undetermined. Once you start going through the diagnostic troubleshooting steps, these conditions will change to Believed Bad or Believed Good, based on the answers the user provides.

4. Use the Find within search field at the top right of the page to search for data within the Diagnostic Troubleshooting source.

Figure 10-15. Find Within

5. Perform each test when prompted and select a response.

Figure 10-16. Select a Response

6. Click on the **Back** button at the bottom right of the page to return to the prior step. Click on the **End** button to end the troubleshooting session.

Figure 10-17. Back and End Buttons

7. As you progress through the session, the condition status will update for each suspected cause in the list based on your results.

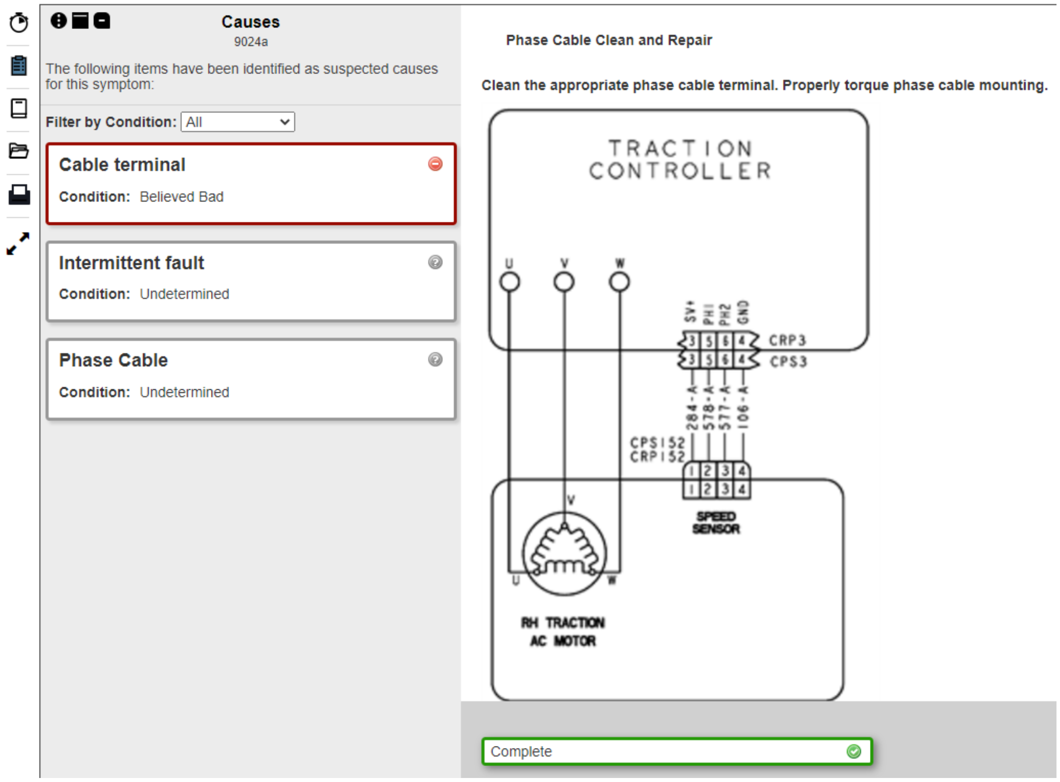


Figure 10-18. Updated Condition Status

8. Use the **Filter by Condition** drop-down menu to filter the list of suspected causes.

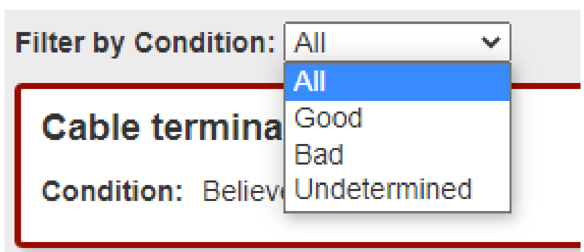


Figure 10-19. Filter by Condition Drop-Down Menu

9. Once a cause has been identified, perform the action requested and click on the **Complete** button.

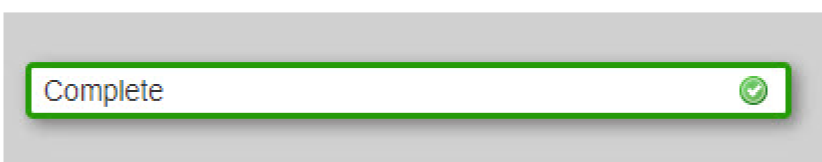


Figure 10-20. Complete Button

10. When there are no more tests to perform/questions to answer, and the issue has been resolved, a confirmation pop-up message will display.

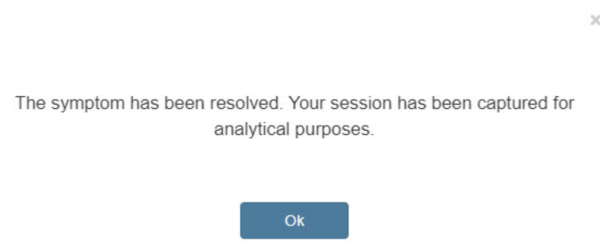


Figure 10-21. Confirmation Pop-Up Message

Saving a Session to Resume Later

Users can suspend a session and resume it later.

To End and Save a Session

1. Open and run a knowledge model or diagnostic troubleshooting session. Refer to How to Use a Knowledge Model or How to Use a Diagnostic Troubleshooting Publication for assistance in starting a session.
2. Click on the **End** button.

Figure 10-22. End Button

3. A confirmation pop-up message displays.

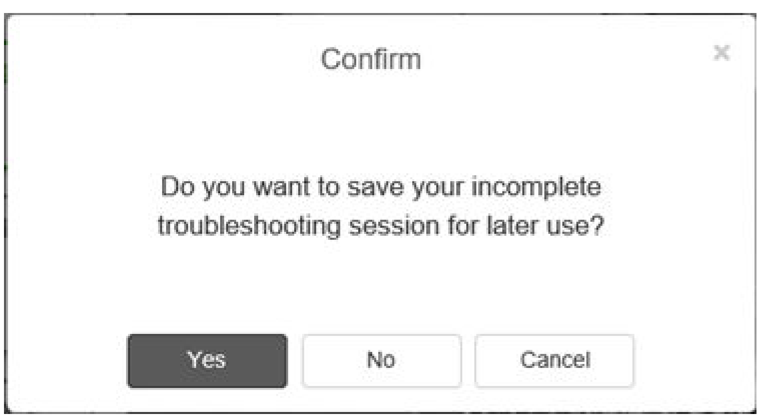


Figure 10-23. Confirmation Message

4. Click on the **Yes** button.
5. Enter an optional description for your knowledge model session and click on the **Save** button.

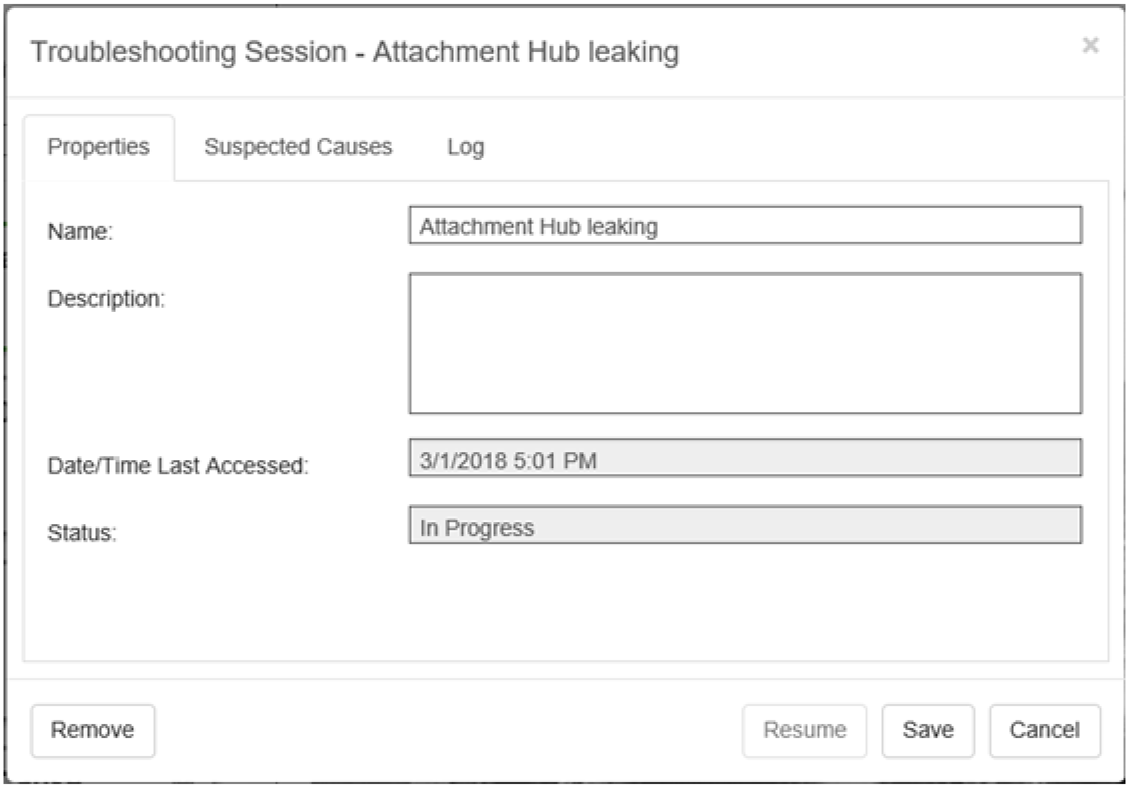


Figure 10-24. Enter an Optional Description

6. The session will be saved to the log and can be resumed at a later time.

Resuming a Saved Session

If a session has been saved before it could be completed, it can be resumed by performing the following steps:

1. Open the knowledge model or diagnostic troubleshooting source.

Figure 10-25. Select Source

2. Select the symptom you worked on previously.

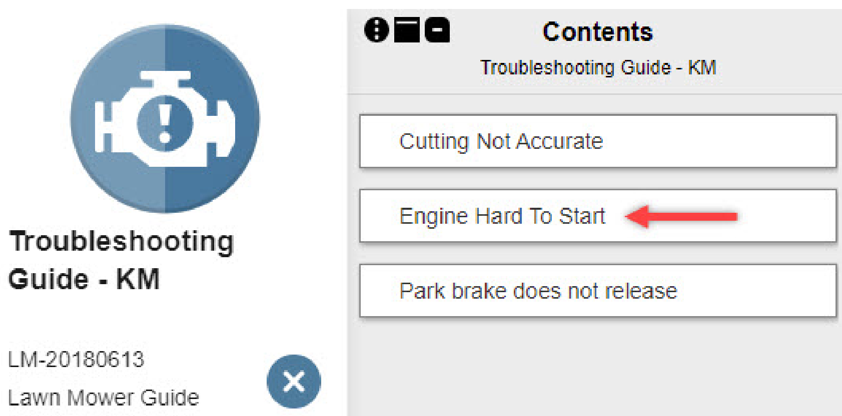


Figure 10-26. Select Symptom

3. Click on the Sessions icon.

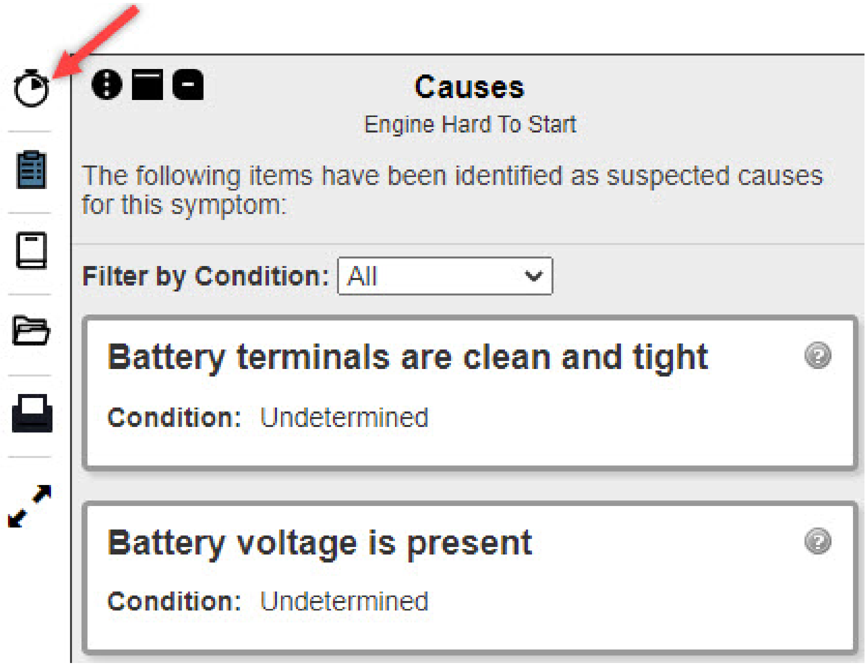


Figure 10-27. Select Sessions Icon

4. A list of sessions will display.

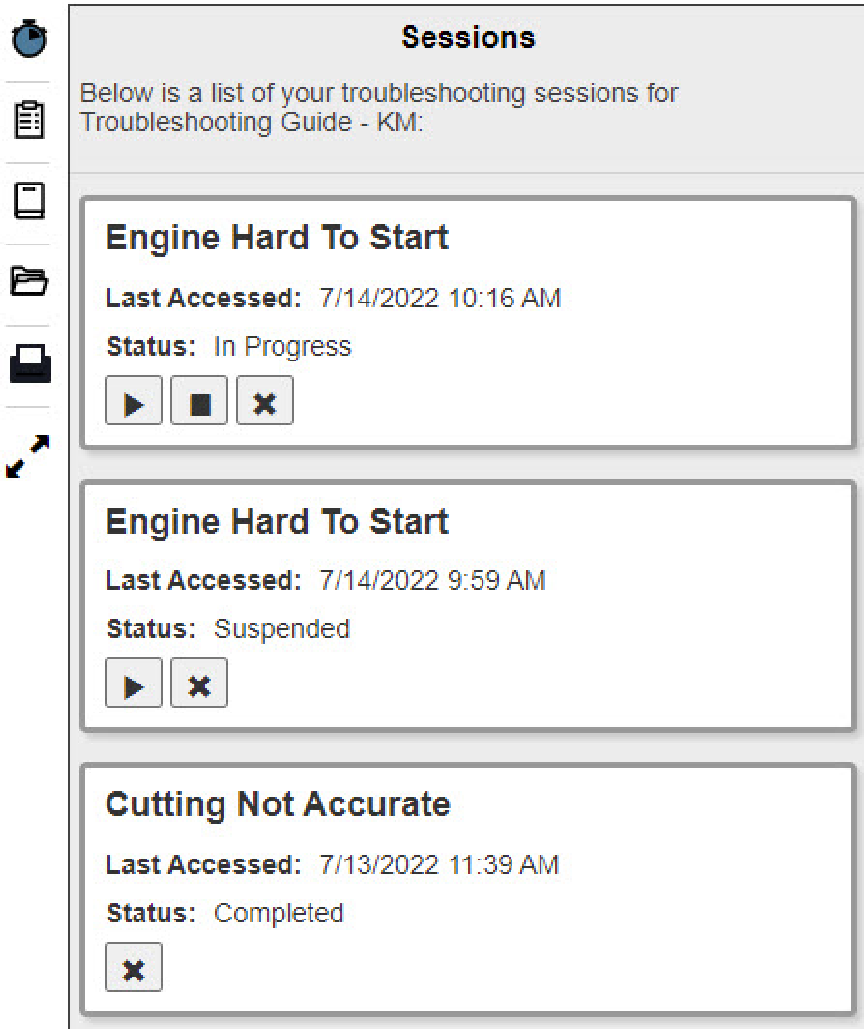


Figure 10-28. List of Previous Sessions

5. Find the session you would like to resume.

6. Click on the Play button (right arrow).

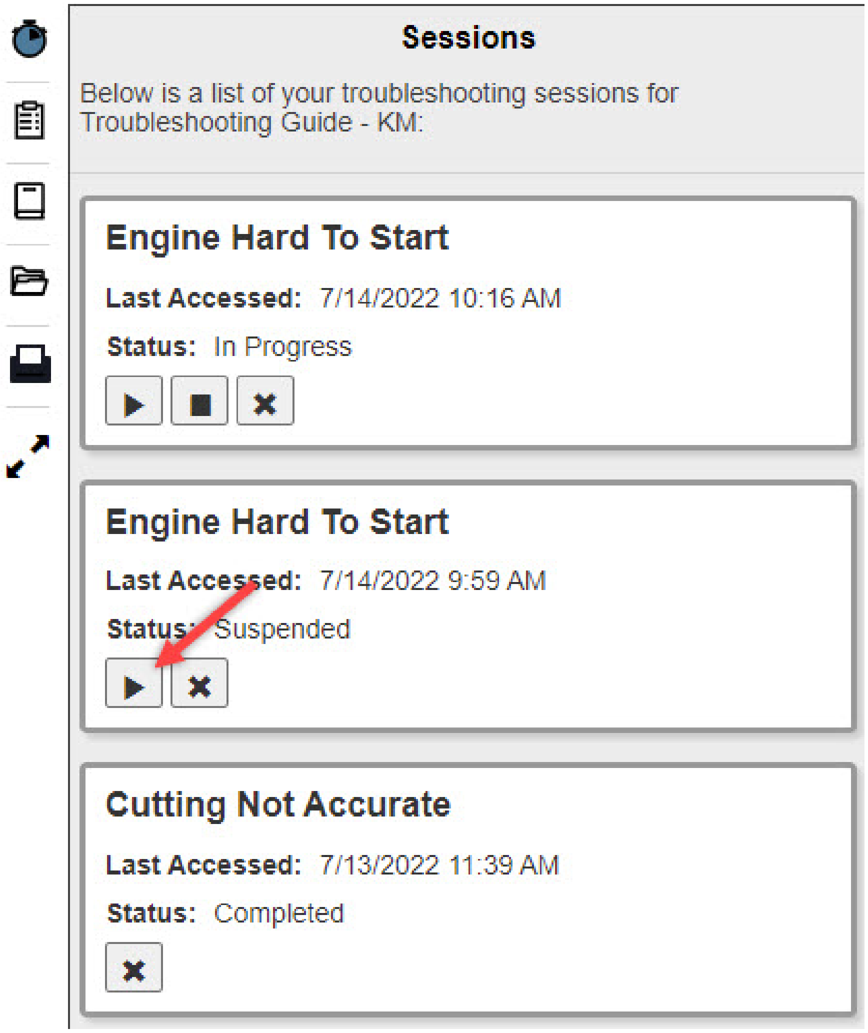


Figure 10-29. Click the Play Button to Resume Session

NOTE: To end the session, click on the Stop button (square); to remove the session, click on the X button.

7. The troubleshooting session will resume where you left off.

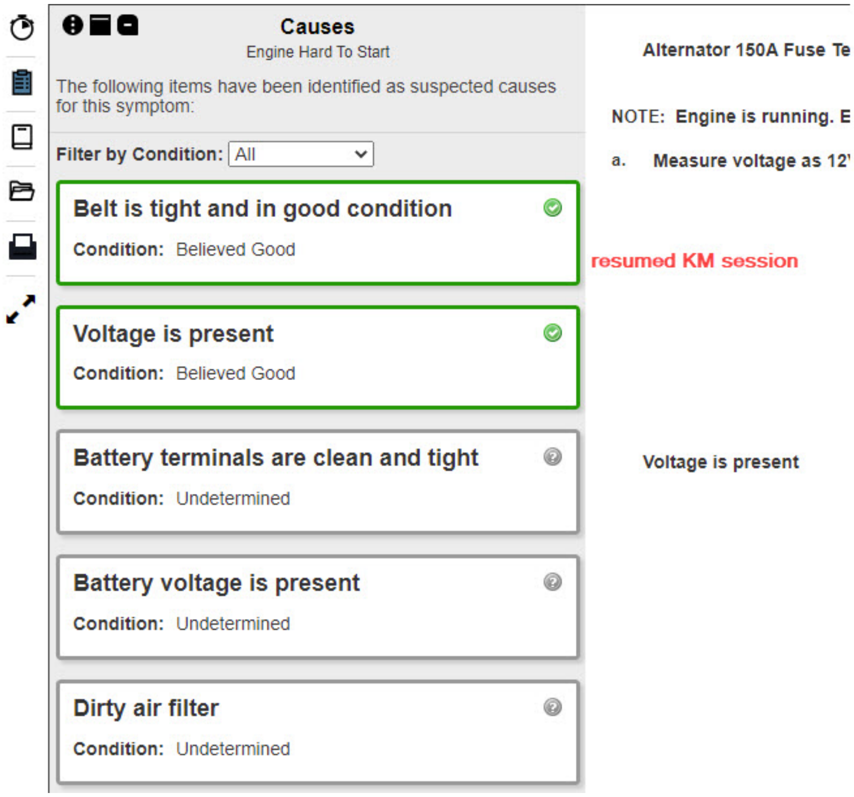


Figure 10-30. Session is Resumed

8. Alternately, you can open the session details by clicking inside the session card or box for the desired session.

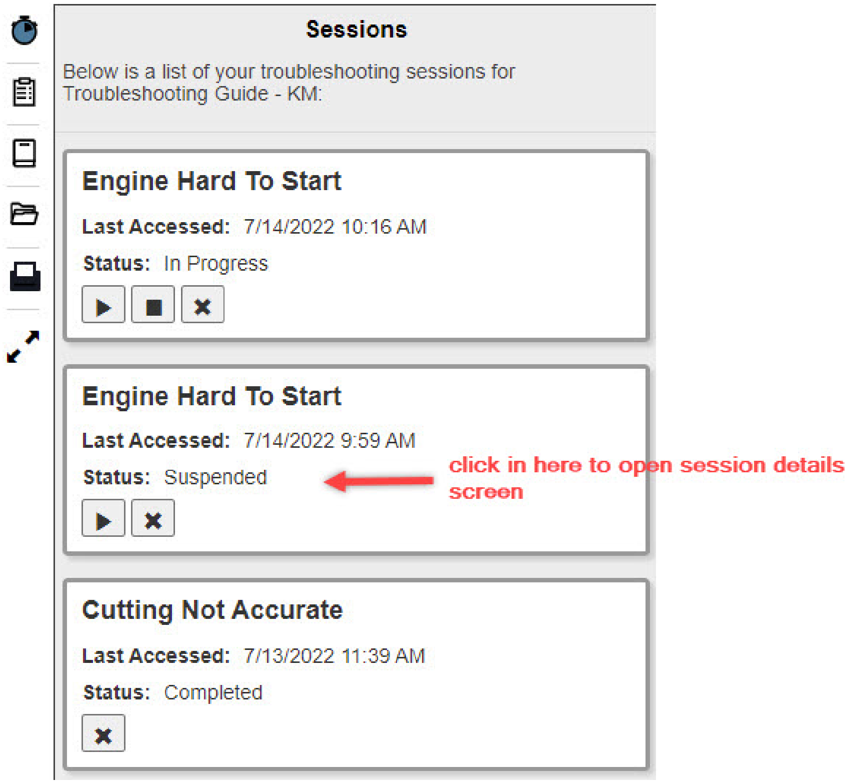


Figure 10-31. List of Previous Sessions

9. The session details window will open.

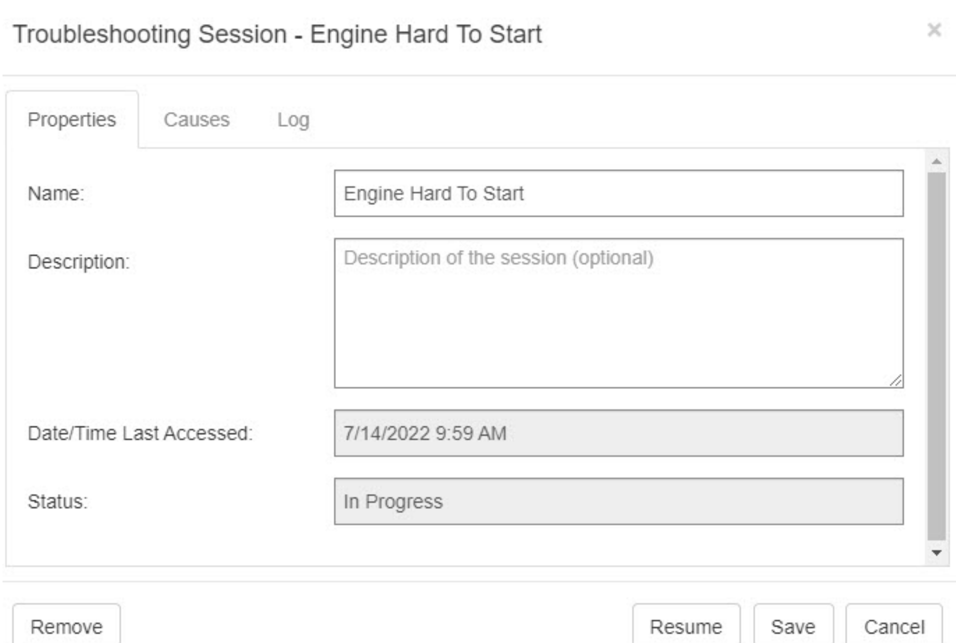


Figure 10-32. Session Details

NOTE: To remove the session, click on the **Remove** button.

10. Click on the **Resume** button to continue the troubleshooting session.

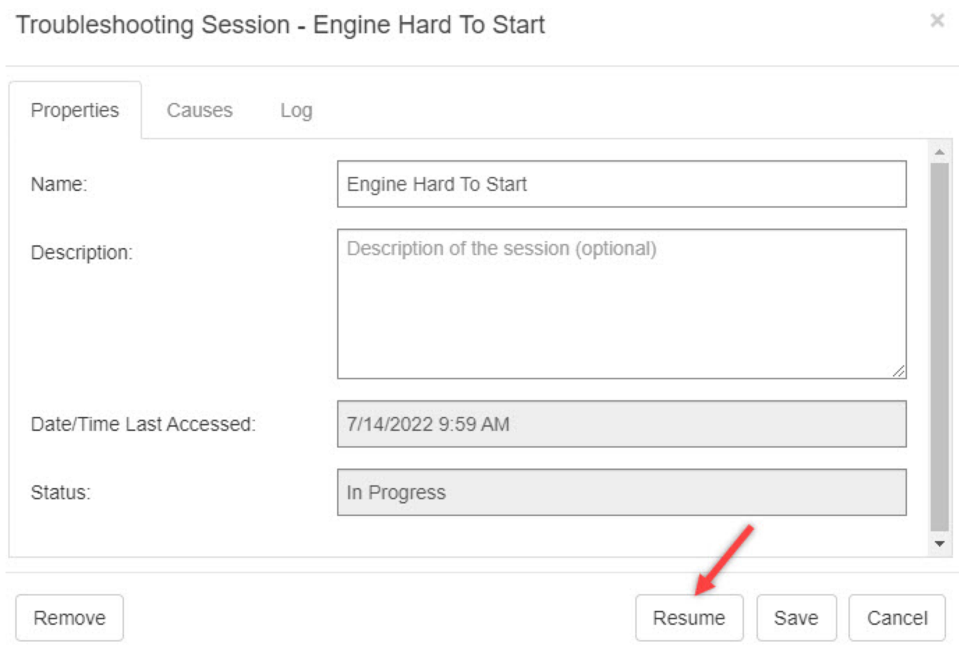


Figure 10-33. Resume Button

Viewing Session History

The ONeSOURCE Client keeps a record of a user's individual troubleshooting sessions. These can be accessed via the sessions icon where users can review the details of a session such as the name of the knowledge model or DTC, the date and time of the session, the suspected causes for the symptom, and a list of the actions performed during the session.

To look at a session's history

1. Open a previously run knowledge model source by clicking on a symptom or DTC.

Figure 10-34. Select a Knowledge Model

2. Click on the sessions icon from the icon bar on the left side of page.

Figure 10-35. Sessions Icon

3. A list of past sessions will display in the left pane.

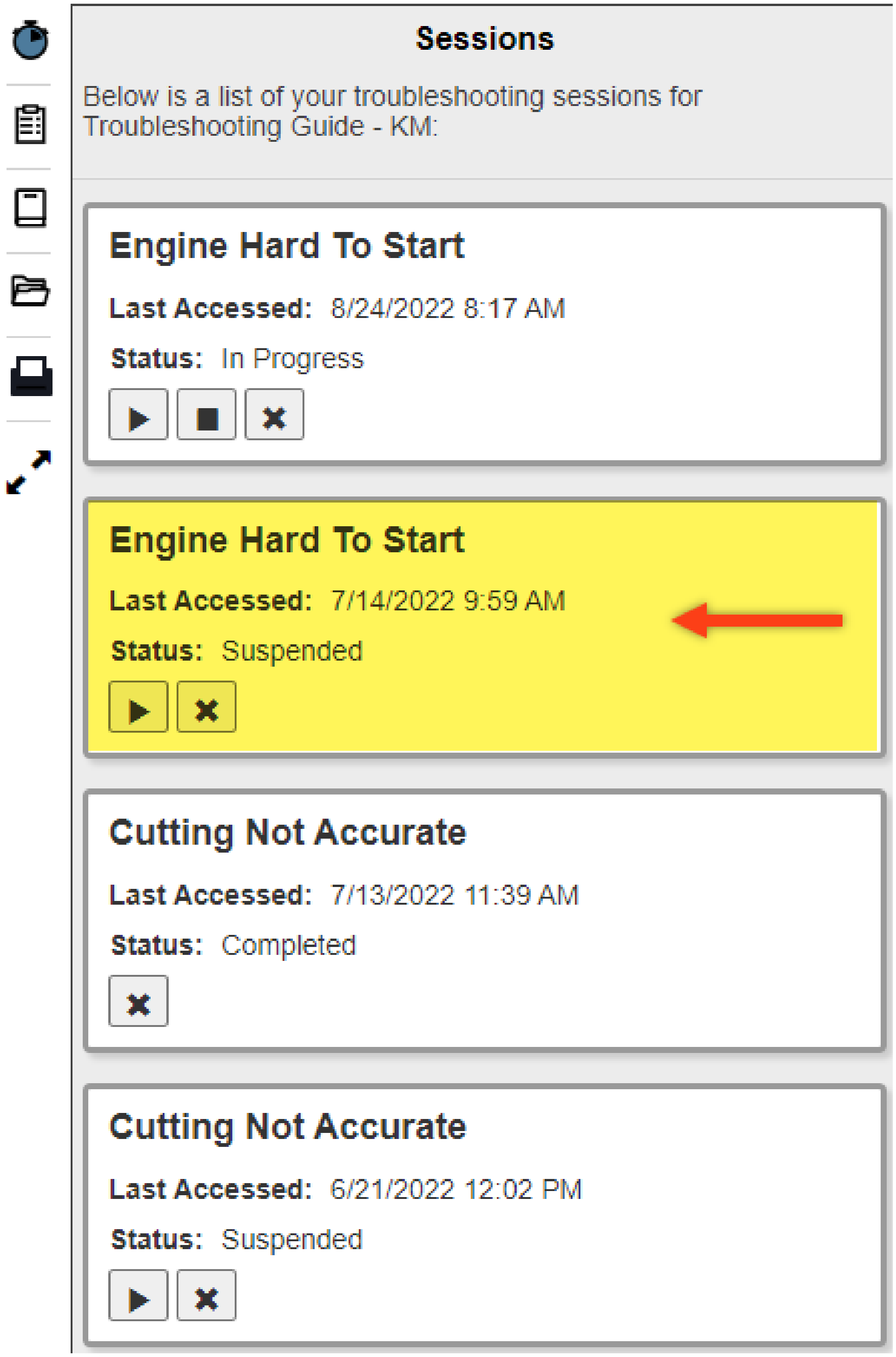


Figure 10-36. List of Previous Sessions

4. Select the desired session by clicking in the session card or box.

5. A pop-up window will open displaying three tabs: Properties, Causes, and Log.

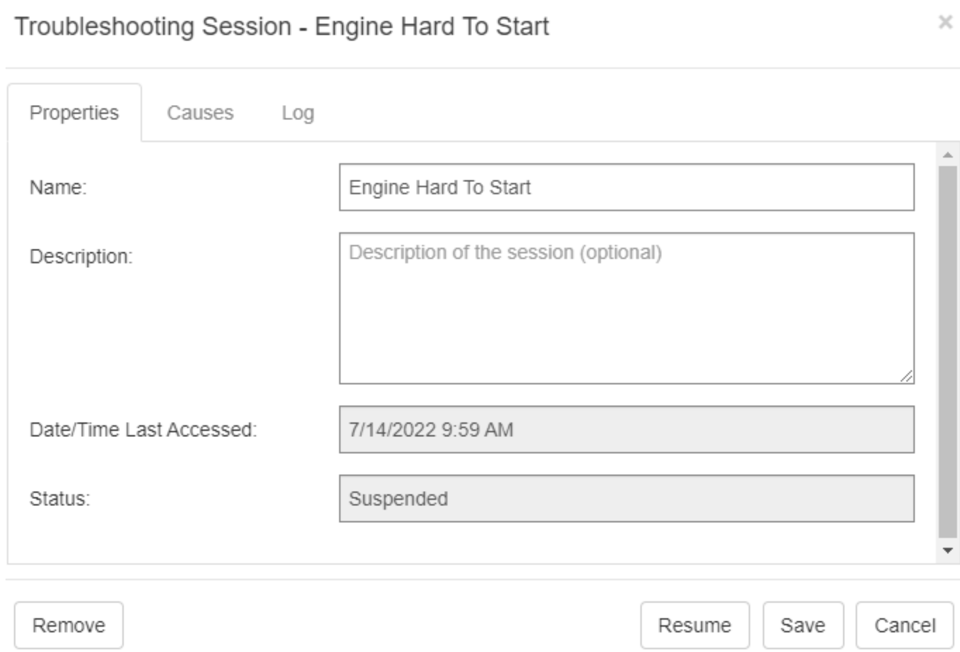


Figure 10-37. Properties Tab

6. Users can edit two fields on the Properties tab: Name and Description. Edit as needed and click the **Save** button to save any changes.

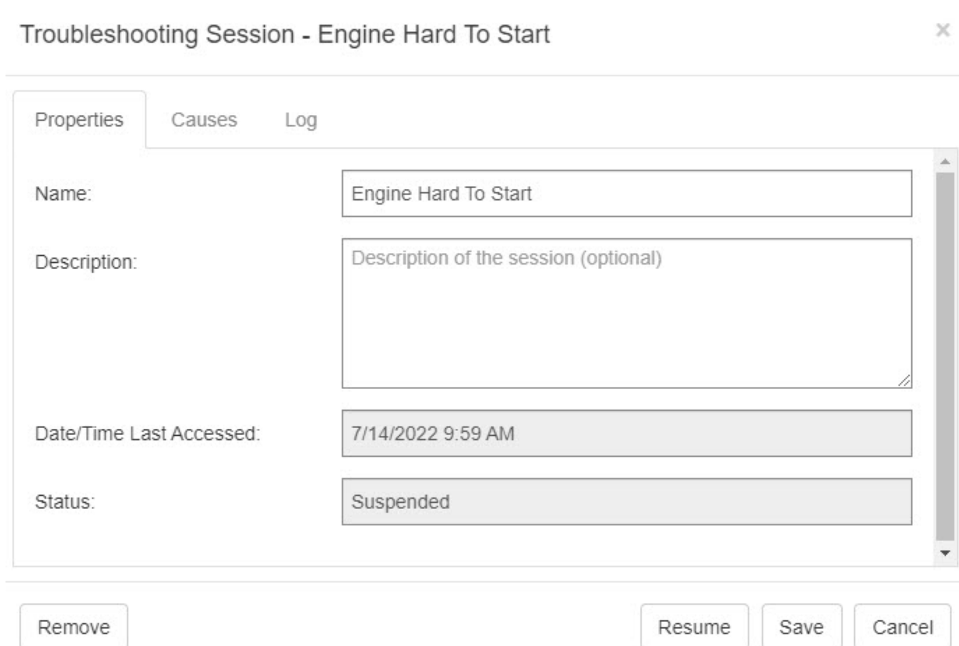


Figure 10-38. Properties Tab (Continued)

7. The Causes tab lists the suspected causes. A scroll bar is provided if there are more causes than can fit within the window.

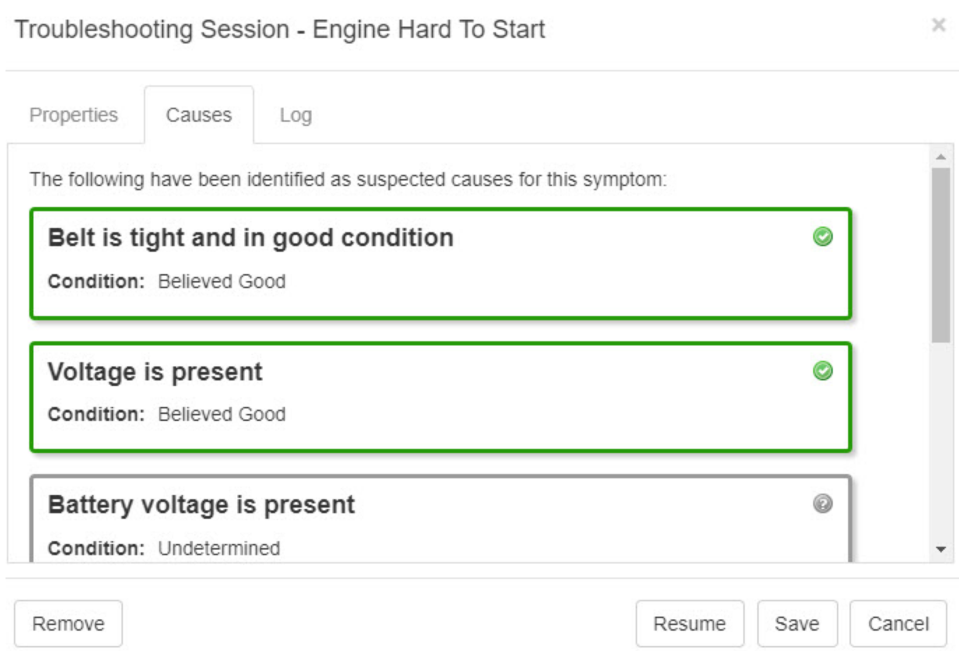


Figure 10-39. Causes Tab

8. The Log tab lists the actions taken during the sesson. A scroll bar is provided if there are more actions than can fit within the window.

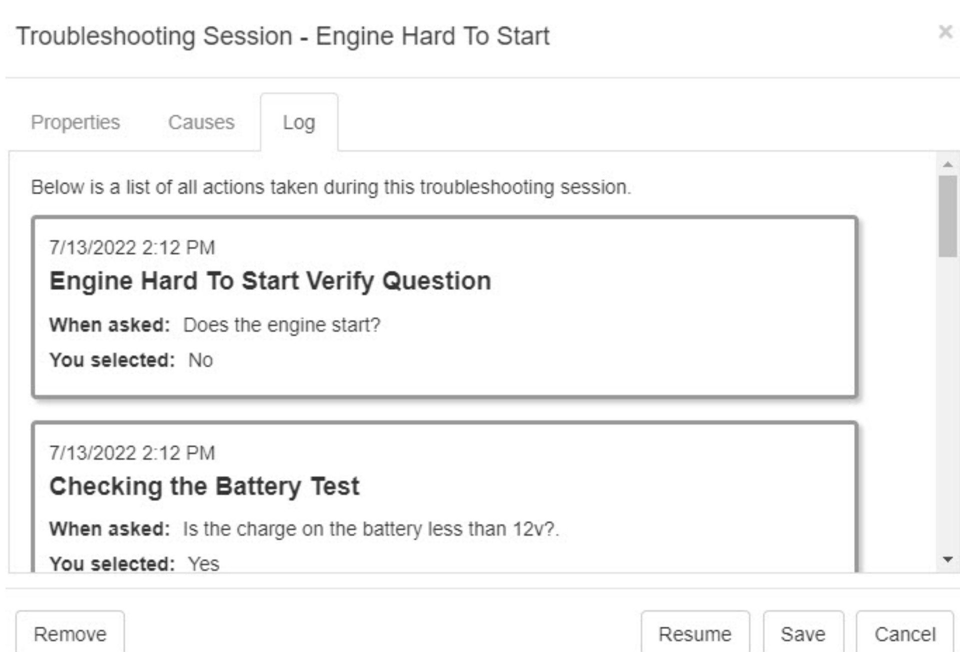


Figure 10-40. Log Tab

Reordering of Process Flows Based on Past Responses

When a user runs through a symptom a few times and a specific process flow is the solution, the next time the user starts a session for the same symptom, the system will reorder the process flows so that the solution arrived at in the previous session is presented first. To represent this visually, if the Knowledge Model is initially structured like this:

- Symptom 1
  - **Process Flow 1**
    - Step A
    - Step B
    - Step C
  - **Process Flow 2**
    - Step D
    - Step E
  - **Process Flow 3**
    - Step F
    - Step G

When the user runs through Symptom 1 a few times and the solution is reached at Process Flow 3, the next time they start a session on this symptom (Symptom 1), it will reorder the process flows so that Process Flow 3 will be first, followed by Process Flows 1 and 2, like this:

- Symptom 1
  - **Process Flow 3**
    - Step F
    - Step G
  - **Process Flow 1**
    - Step A
    - Step B
    - Step C
  - **Process Flow 2**
    - Step D
    - Step E

Users need to be aware that this can happen when using knowledge models. The number of times a user has to provide the same answers to the questions before the system reorders the process flows varies by symptom, but it is usually after three to four sessions. The intent of the reordering is to save users time while troubleshooting by looking at previous sessions and presenting what has been the most likely solution first.

By doing this, however, the other process flows originally at the beginning are no longer displayed when the user starts another session on the same symptom. This reordering will be permanent and the only way to view the original process flows is to select another product that contains the same Knowledge Model, or, if the user is running the installed Client, to uninstall and reinstall the ONeSOURCE Client as well as the affected dataset.

Schematics Viewer

How to View Interactive Schematics

To help users navigate within a schematic, a toolbar is available that contains several icons to perform different actions.

When the ONeSOURCE Client is displaying a schematic, the toolbar will display in the list of icons on the left. Display of the toolbar can be toggled on and off by clicking on it.

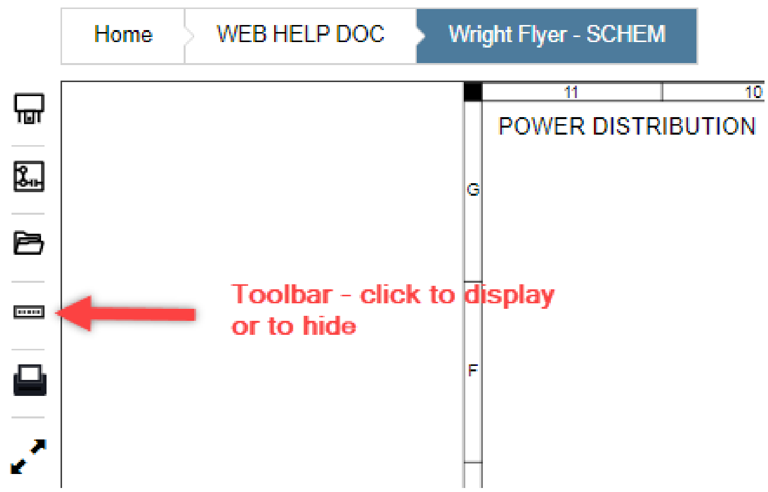


Figure 11-1. Schematics Toolbar is Off

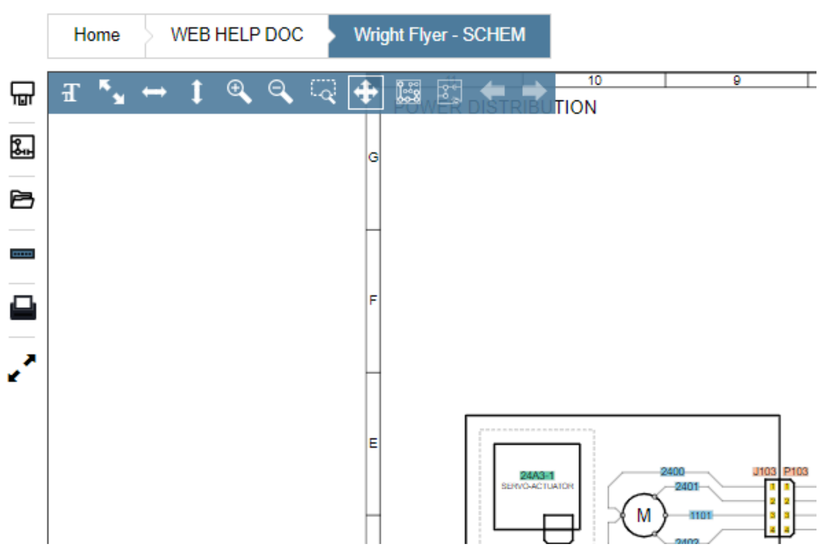
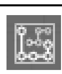
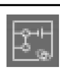


Figure 11-2. Schematics Toolbar Toggle is On

When toolbar is on, it will display at the top left of the schematic.

Figure 11-3. Schematic Toolbar

Table 11-1. Legend to Icons

Icon	Function
	Toggle between small and larger toolbar icons
	Best fit (also shift + b)
	Fit width (also shift + w)
	Fit height (also shift + h)
	Zoom in (also scroll mouse wheel up)
	Zoom out (also scroll mouse wheel down)
	Zoom selection (also ctrl + left mouse button and drag)
	Pan (also shift + left mouse button)
	Select circuits
	Show/hide unselected circuits
	Go to previous diagram
	Go to next diagram

NOTE:

a. Toolbar buttons may vary depending on customer configuration.

b. When the schematic is fully zoomed, users can scroll left/right or up/down by using the shift key and moving the mouse wheel.

Viewing Circuits

Users can view circuit information for the schematic they are viewing by clicking on the circuit's icon.

To Display Circuit Information

1. Select a schematic publication.

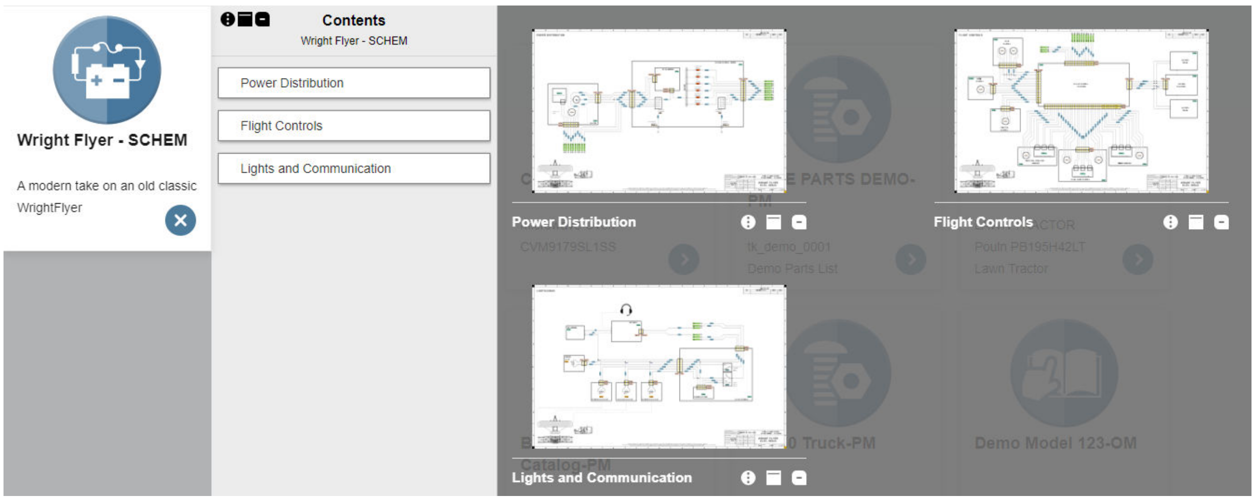


Figure 11-4. Schematic Publication

2. Select a schematic by clicking on the card in the contents list or the corresponding diagram.
3. Click on the circuits icon to open the circuits pane.

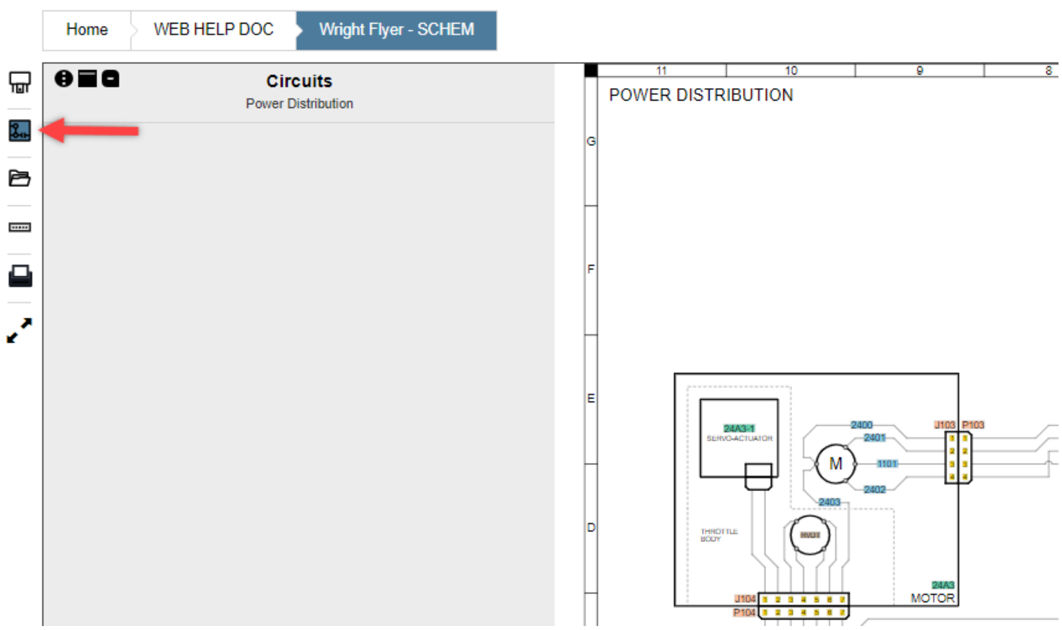


Figure 11-5. Circuits Pane

NOTE: The Circuits pane is initially blank until a circuit is selected in the schematic.

4. Select a circuit to highlight it (circuit will change color). The circuit is added to the circuits pane.

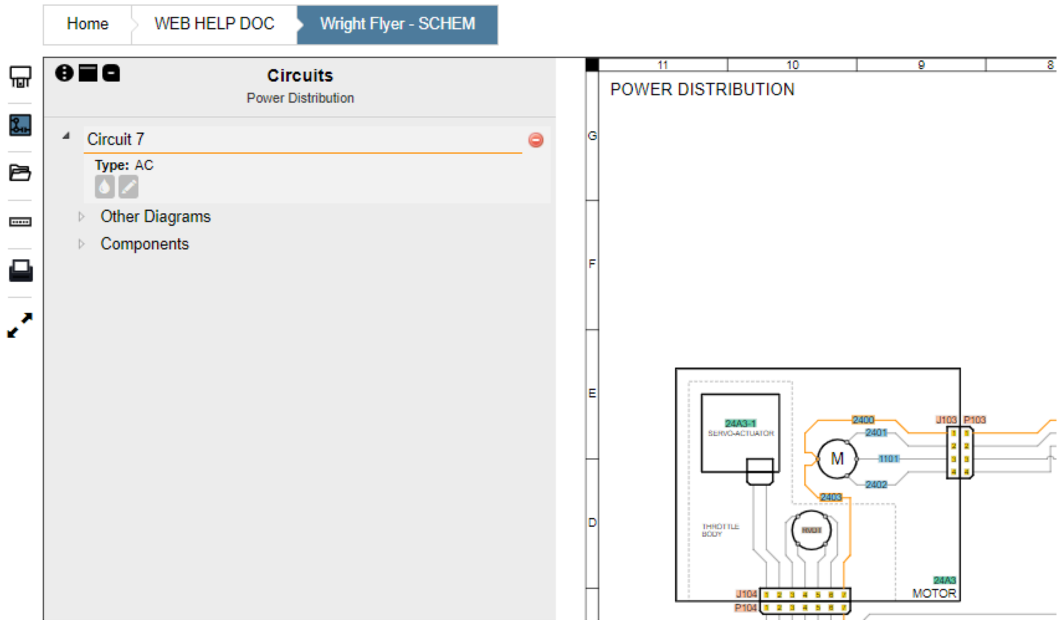


Figure 11-6. Circuits Pane After Selecting a Circuit

5. Select another circuit. The circuit will be added to the Circuits pane.

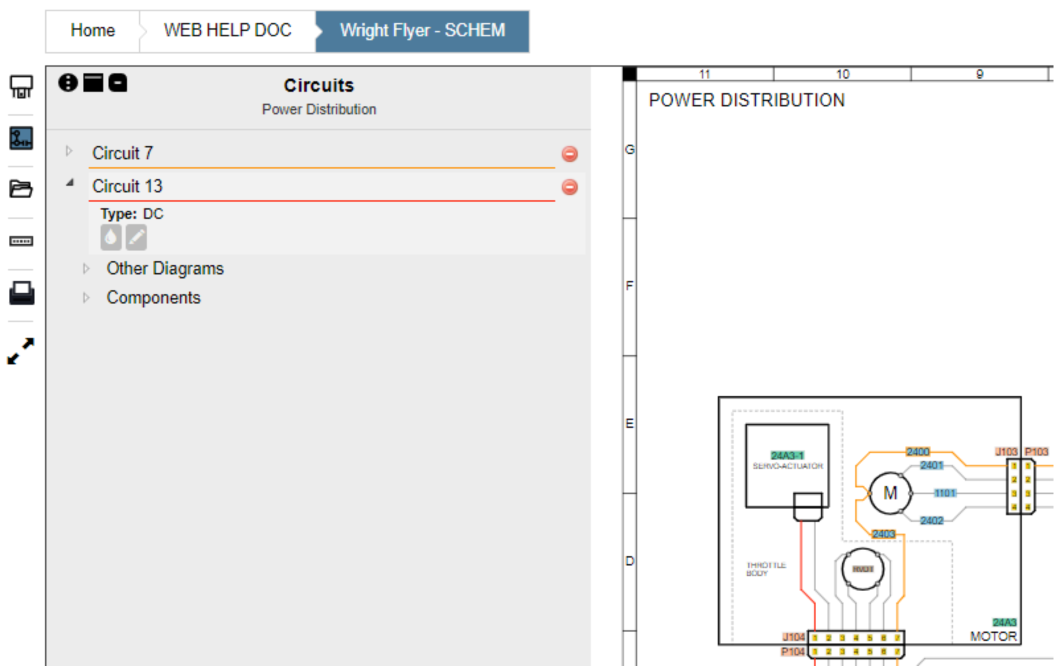


Figure 11-7. Circuits Pane (Continued)

6. To change the color of the selected circuit, click on the paint icon.

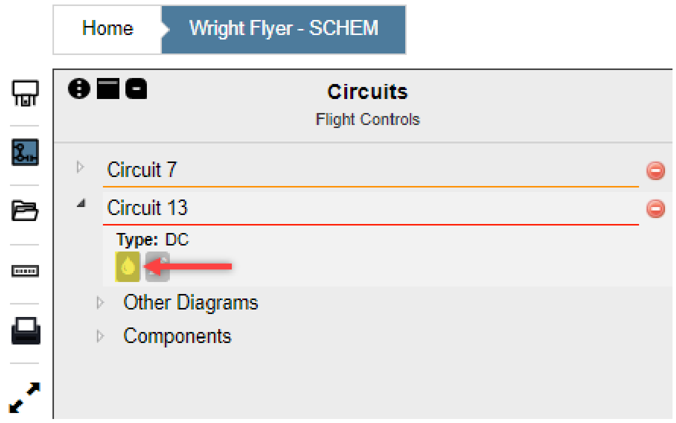


Figure 11-8. Paint Icon

7. Select a color from the Change Circuit Color palette.

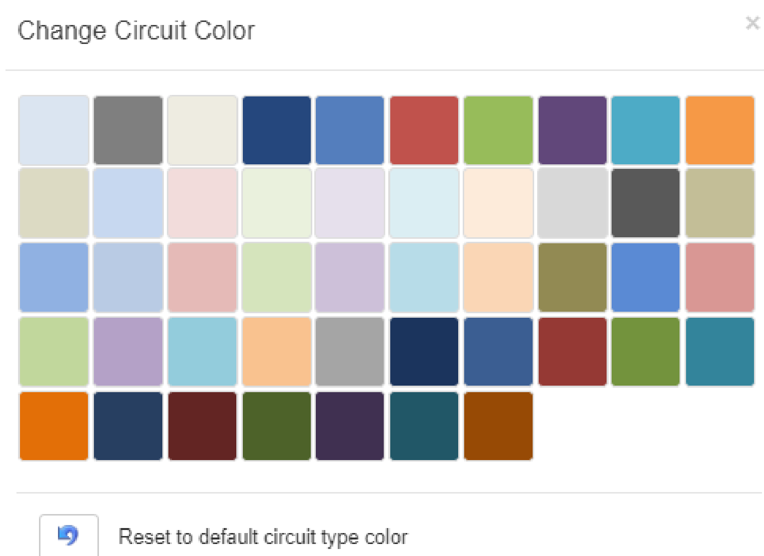


Figure 11-9. Change Circuit Color

8. The circuit color is changed.

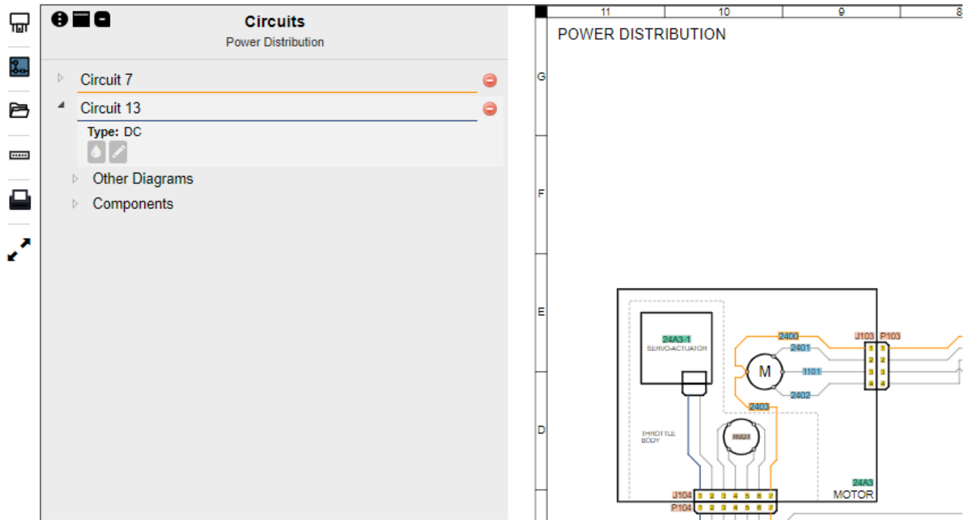


Figure 11-10. Circuit Color Change

9. To rename a circuit, click on the pencil icon.

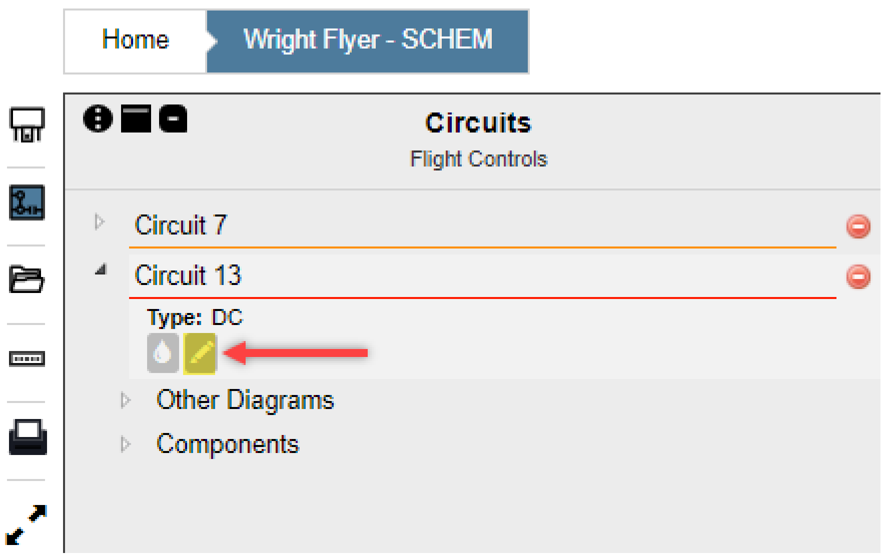


Figure 11-11. Pencil Icon

10. Enter the new circuit name and click the **Save** button.

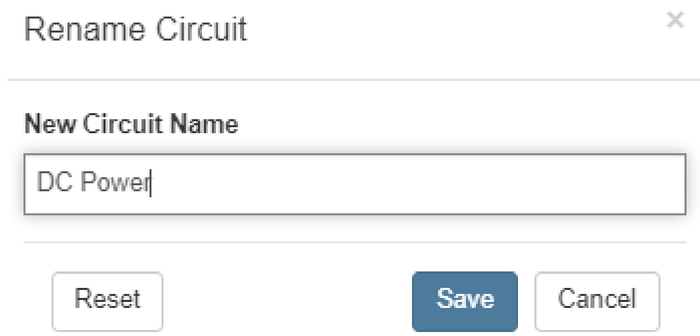


Figure 11-12. Rename Circuit

11. The circuit name is changed.

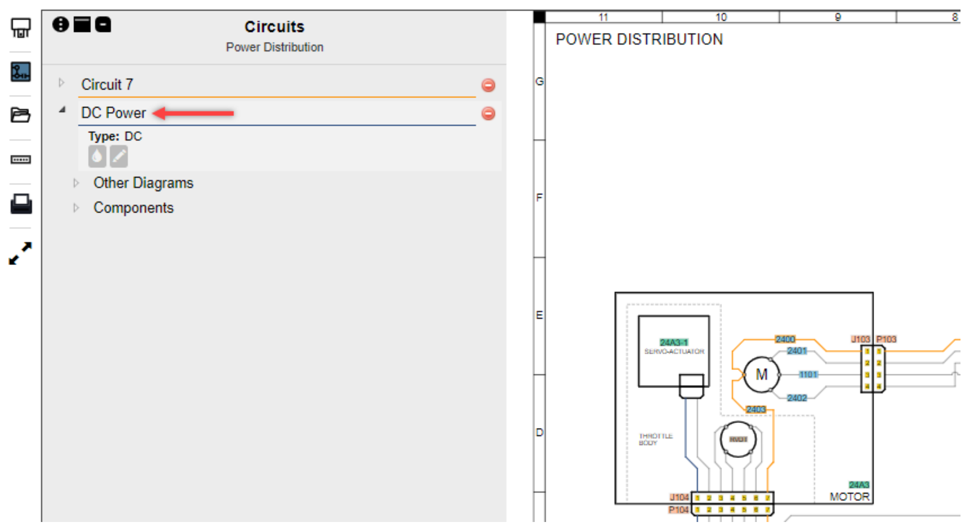


Figure 11-13. Circuit is Renamed

12. Click the arrows next to Other Diagrams and Components to expand their contents.

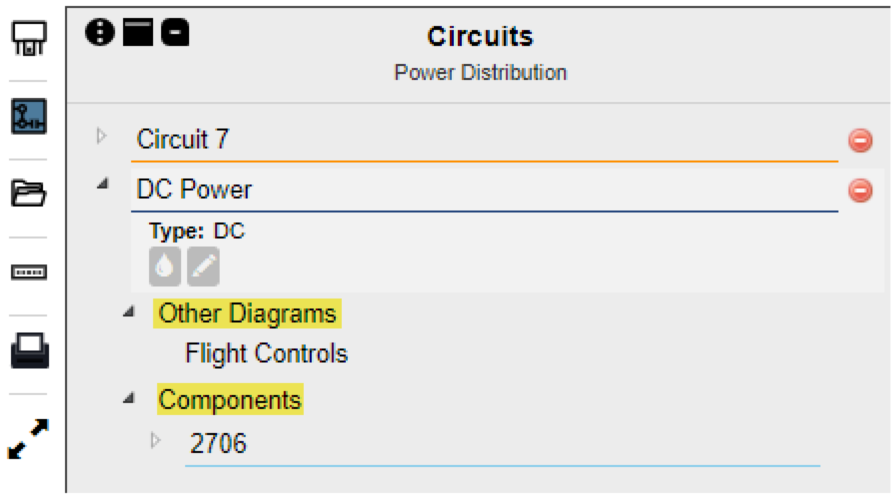


Figure 11-14. Other Diagrams and Components

13. Like the schematic's toolbar, the circuits pane can be toggled on or off by clicking on the circuits icon on the left. Toggling the circuits pane off may be desirable when viewing the schematic on a portable device where screen space is limited. The system will remember the setting to hide or display the circuits pane until the user clicks the circuits icon again to change it.

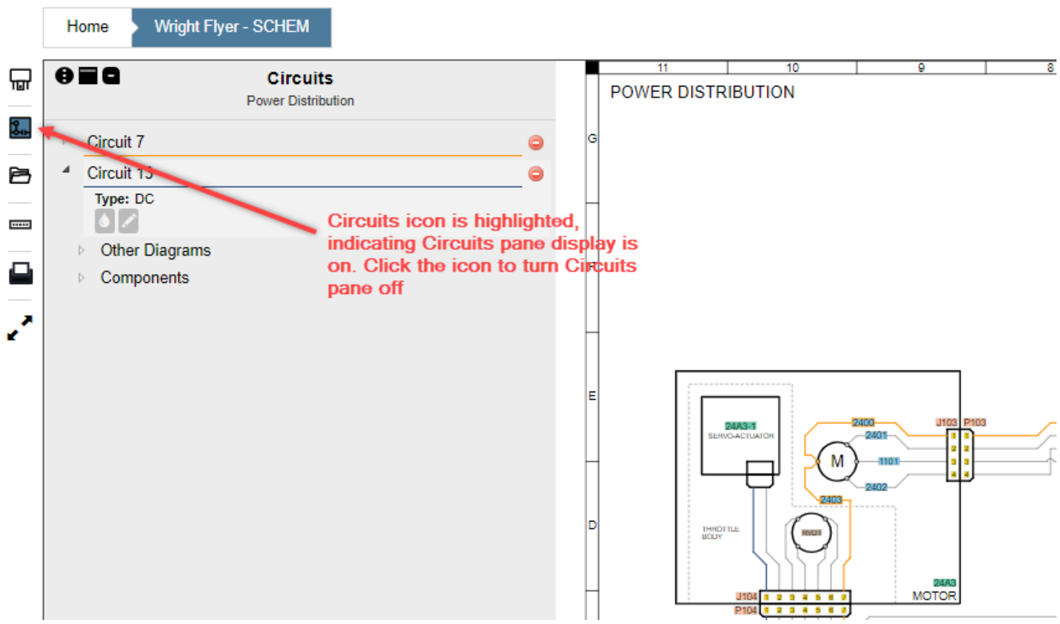


Figure 11-15. Circuits Pane - On

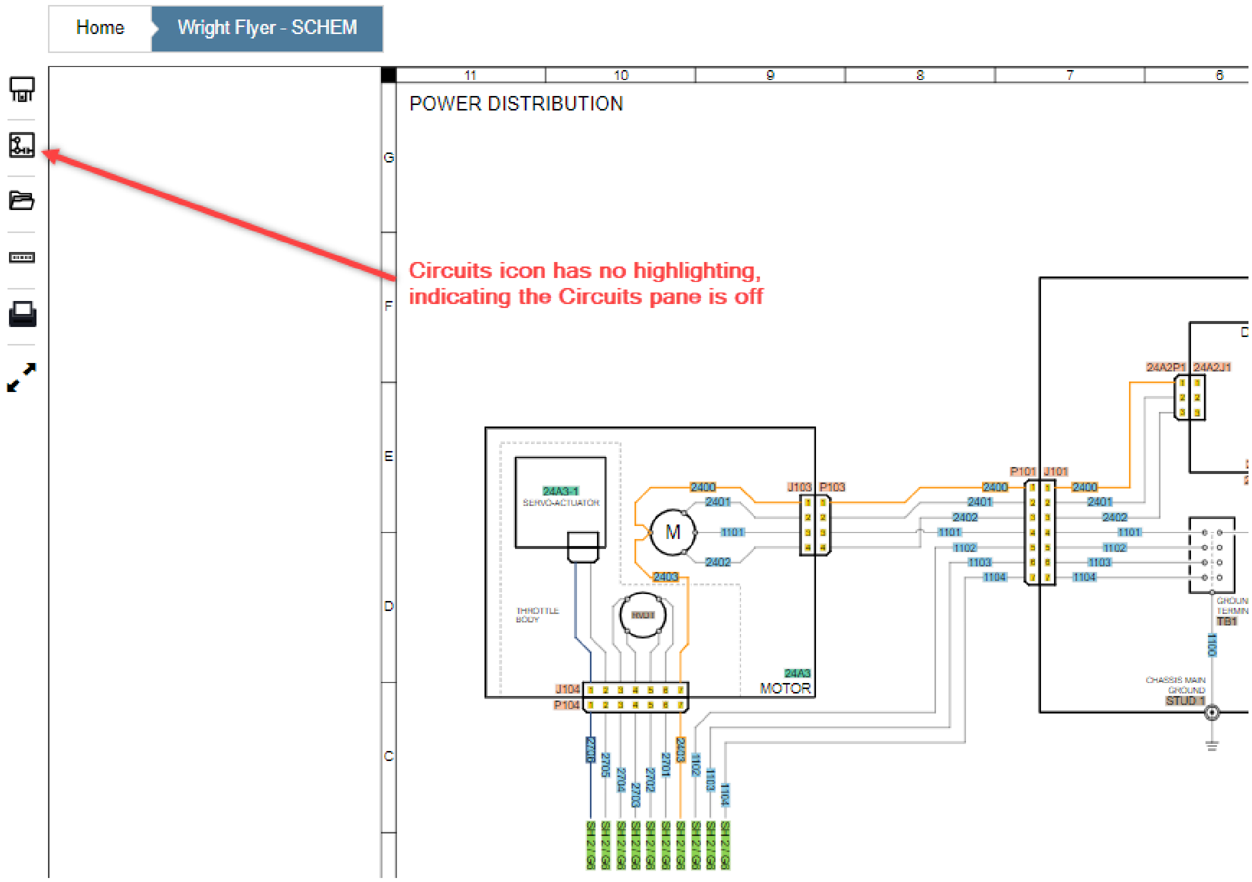


Figure 11-16. Circuits Pane - Off

Viewing Components

Users can view components for the schematic they are viewing by clicking on the components icon.

To Display Components

1. Select a schematic publication.

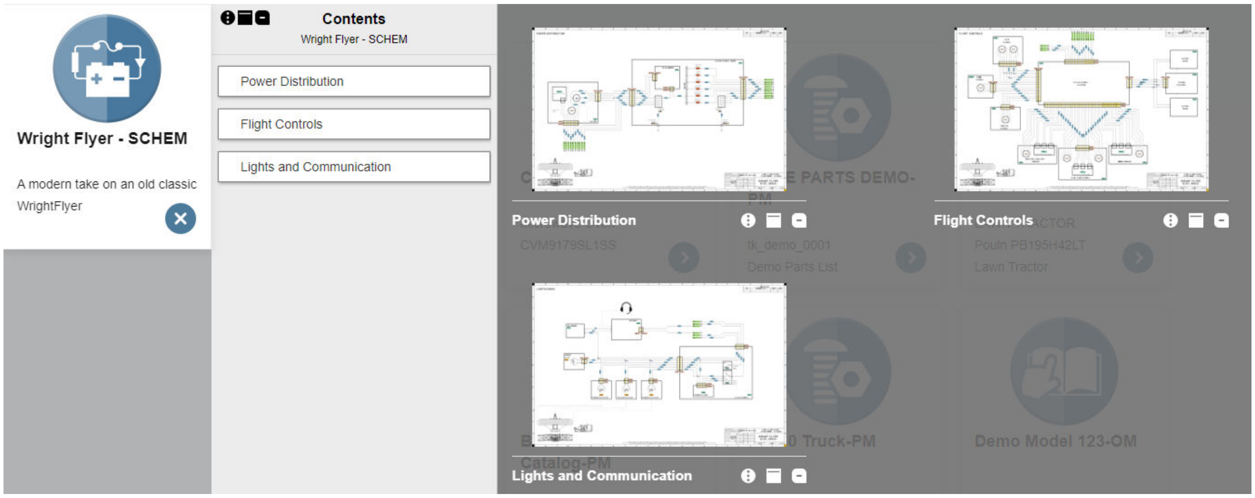


Figure 11-17. Select Schematic Publication

2. Select a schematic by clicking on the card in the contents list or the corresponding diagram.
3. Click on the components icon to open the components pane.

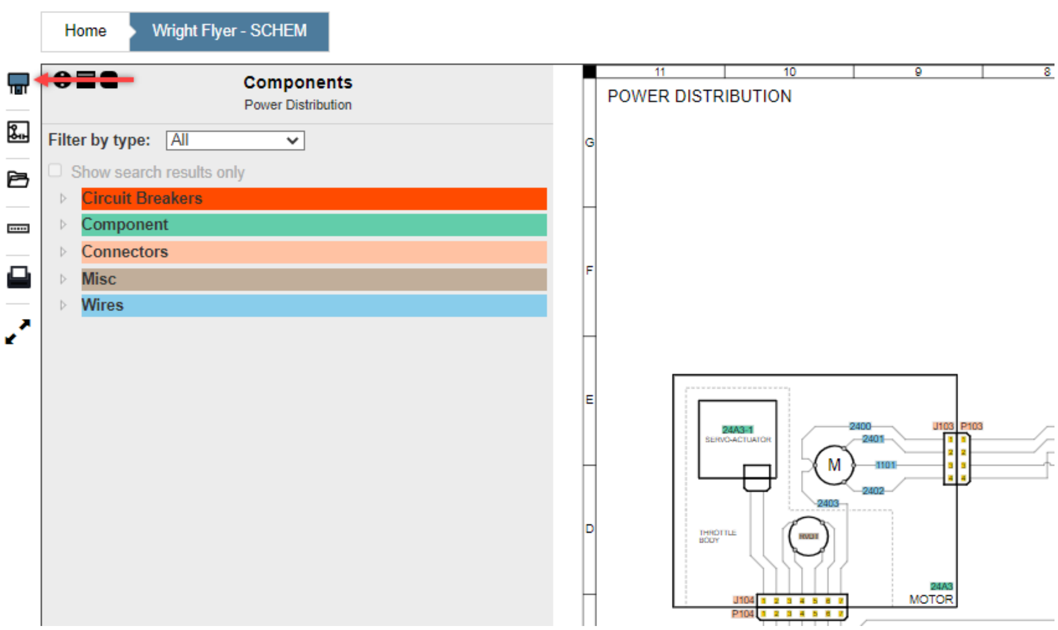


Figure 11-18. Components Icon

4. Expand an entry in the **Components** tree by clicking on a component type (e.g., Circuit Breakers, Component, Connectors, etc.).

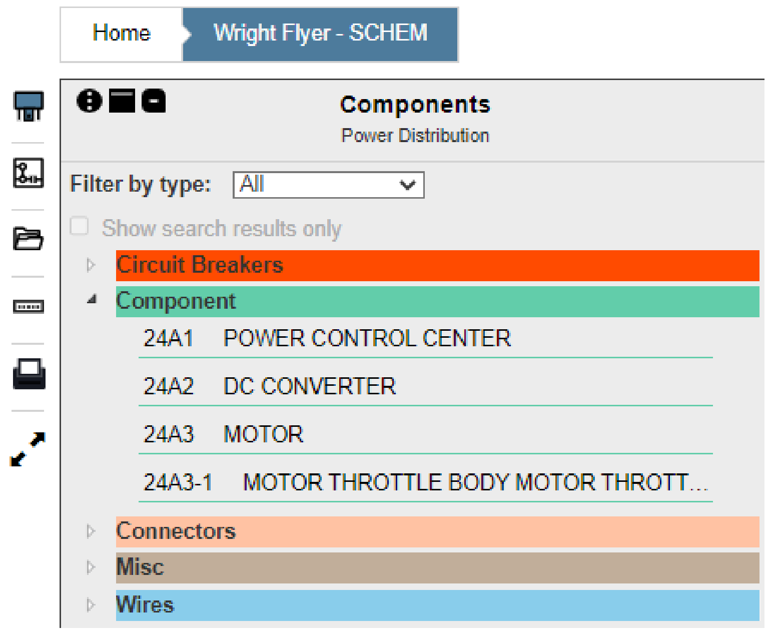


Figure 11-19. Components Tree

5. You may also use the **Filter by type** drop-down menu to filter the list of components.

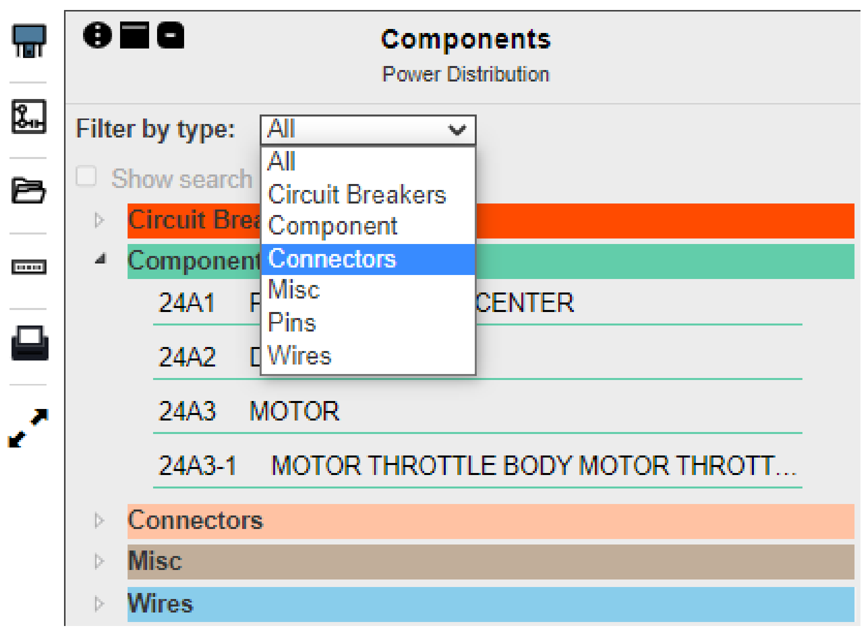


Figure 11-20. Filter by Type Drop-Down

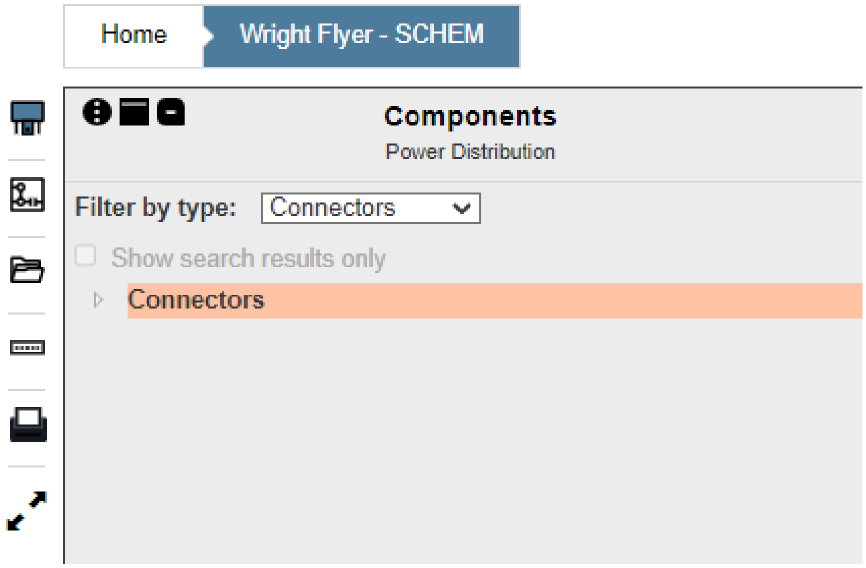


Figure 11-21. Filter Selected

6. Click on a component to locate it on the schematic. A red ring will display momentarily around the component so it can be readily identified on the schematic.

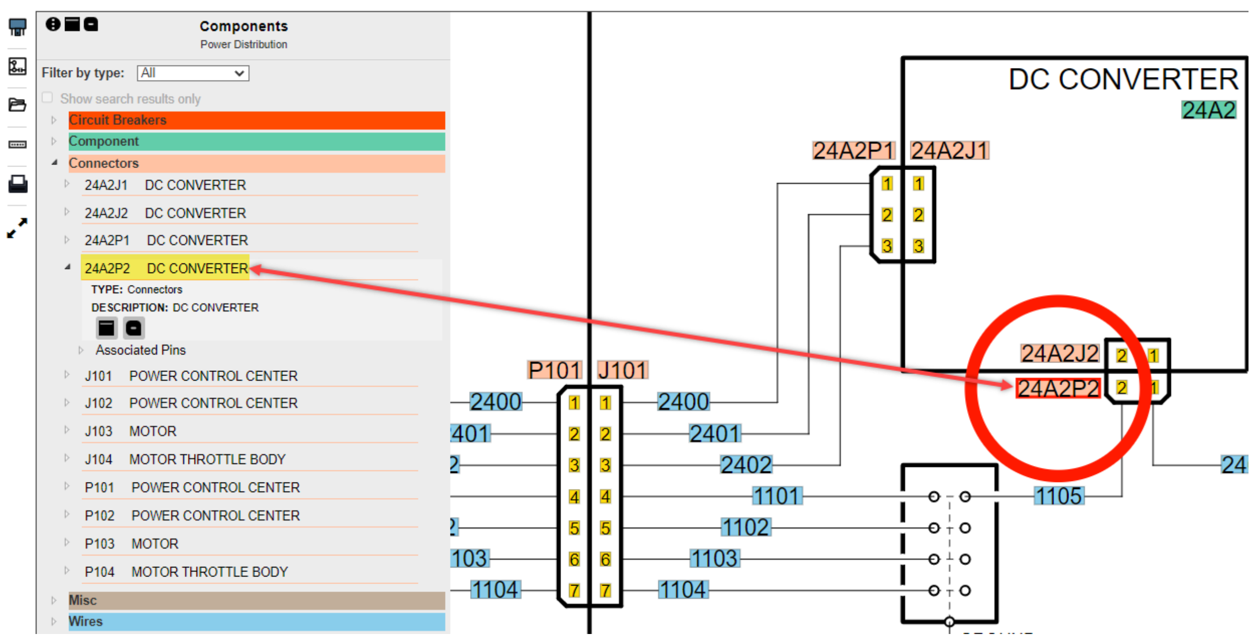


Figure 11-22. Select a Component

7. For most all of the component types, there are icons for adding notes or sending feedback.

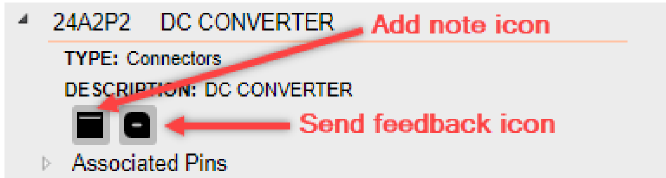


Figure 11-23. Notes and Feedback Icons

8. Like the schematics toolbar, the Components pane can be toggled on or off by clicking the Components icon on the left. Toggling the Components pane off may be desirable when viewing a schematic on a portable device where screen space is limited. The system will remember the setting to hide or display the Components pane until the user clicks the Components icon again to change it.

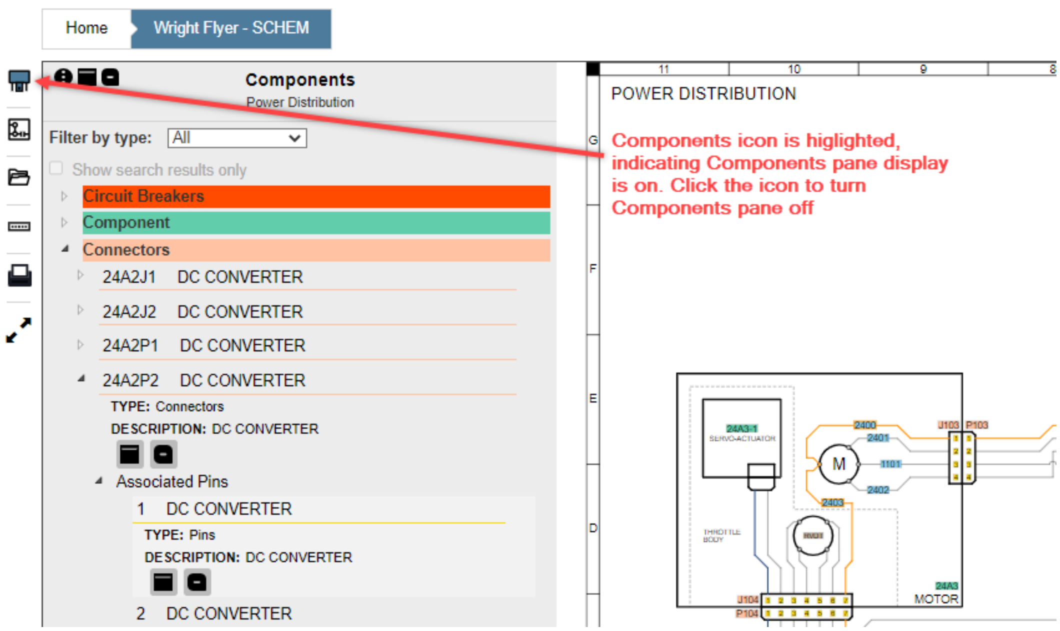


Figure 11-24. Components Pane Toggle - On

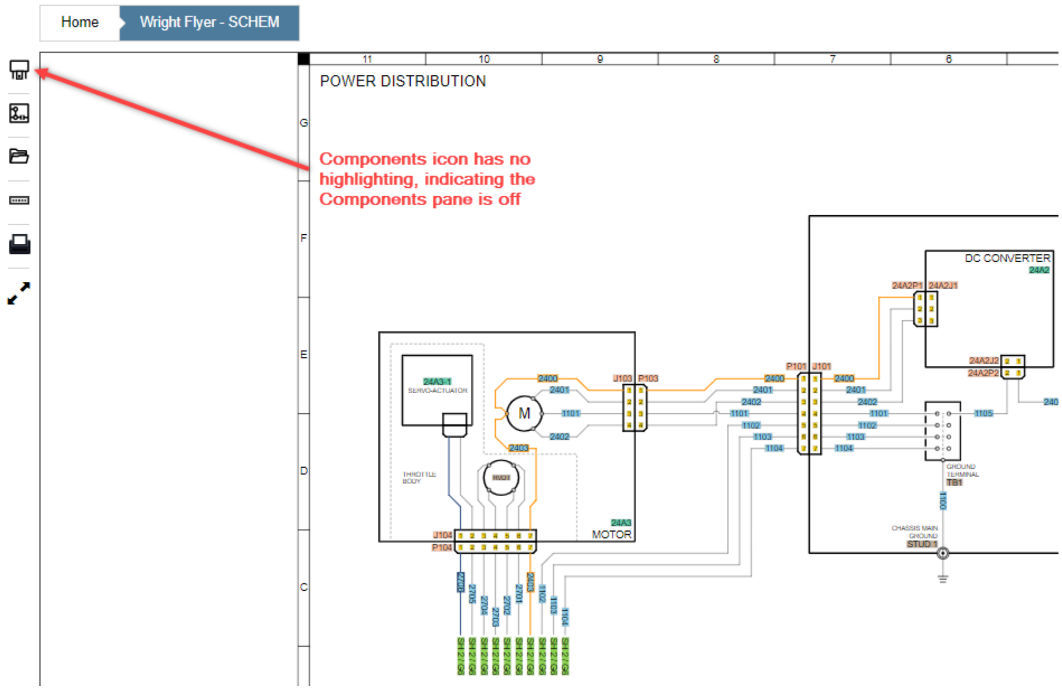


Figure 11-25. Components Toggle - Off

Commonly Used Icons

Commonly Used Icons

There are several icons that appear in several places throughout the ONeSOURCE Client and across all content types:

Table 12-1.

	Contents
	Details
	Feedback
	Note

These icons help users access the content they want to see, and perform tasks like adding notes or submitting feedback.

Contents Icon

The Contents icon appears on the left pane and is available for all content types.

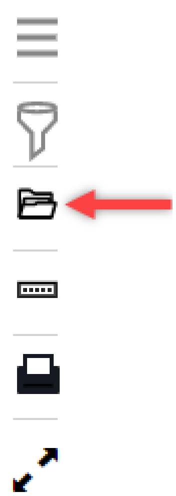


Figure 12-1. Contents Icon

Using the sample parts list below, the initial view is the parts list and parts illustration (the Contents icon is not filled in):

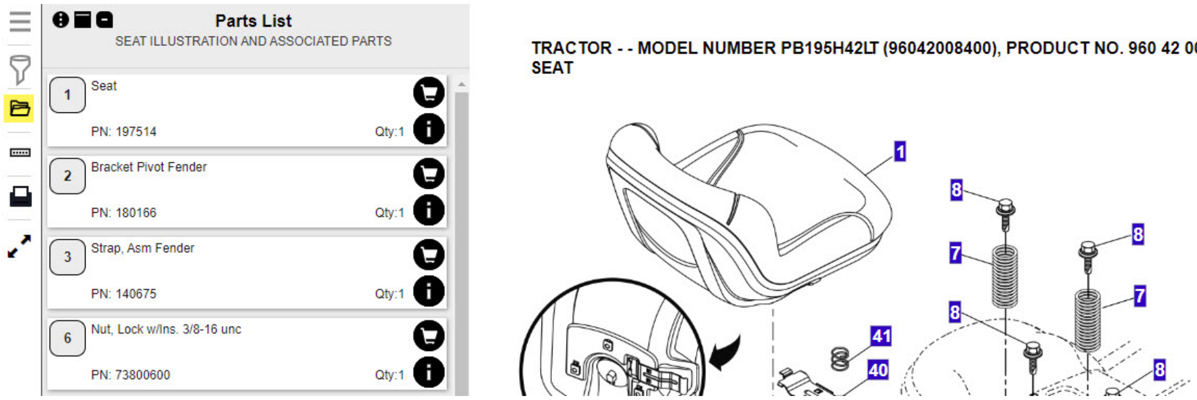


Figure 12-2. Contents Icon (Inactive) - Full Parts List Displayed

1. Clicking on the Contents icon displays the contents of the parts publication (the Contents icon is filled in):

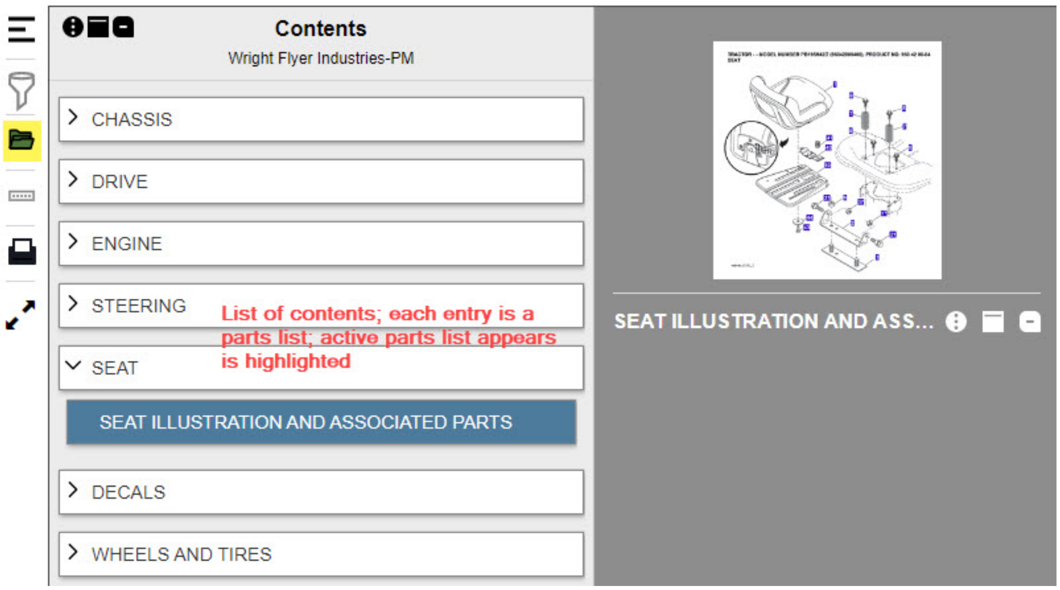


Figure 12-3. Contents Icon (Active) - List of Publication Contents Displayed

2. Click on the Contents icon again. The list of contents is now hidden, showing only the thumbnail image of the parts diagram:

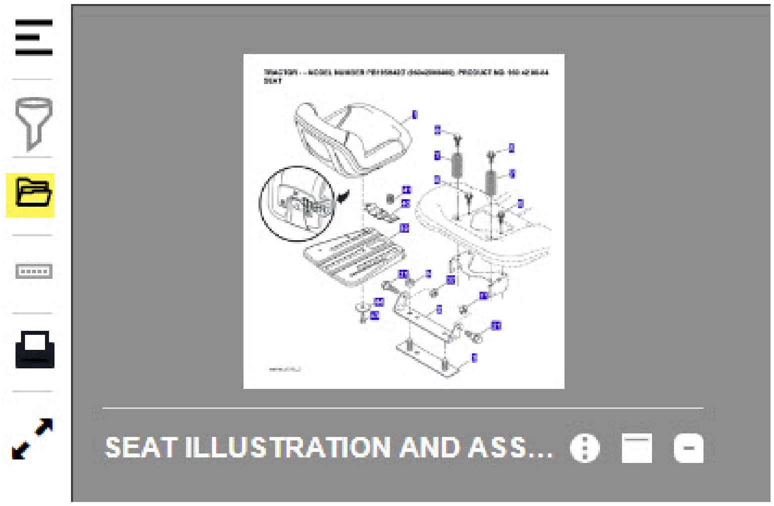


Figure 12-4. Contents Icon (Inactive) - Parts Illustration Displayed Only

3. Click on the Contents icon. The list of contents is displayed.

Details Icon

The Details icon, like the Notes and Feedback icons, appears in several places throughout the Client and across all content types. The details that are displayed vary depending on the location of the details icon within the Client.

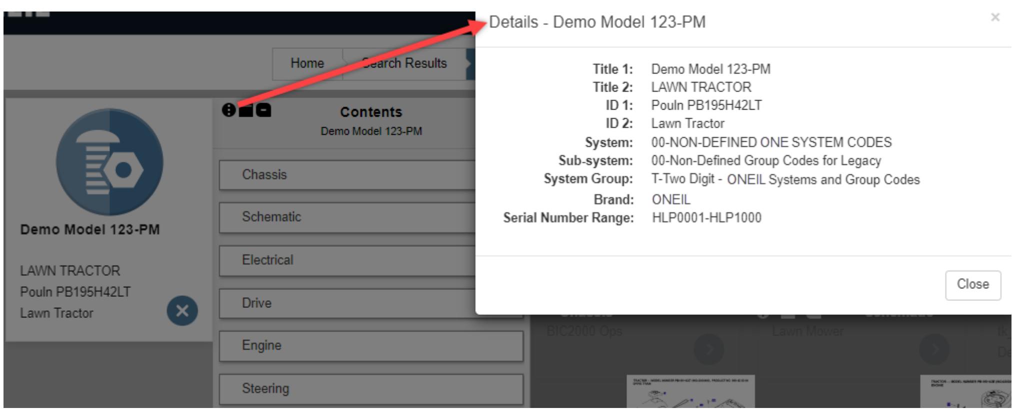


Figure 12-5. Table of Contents Overlay - Parts Manual Level

NOTE: If you have extended applicability assigned for the parts list (as part of your customer configuration), then it will show up in the Details pop-up. In the screenshot above, System and Sub-system are extended applicabilities. The specific details shown will vary based on the customer.

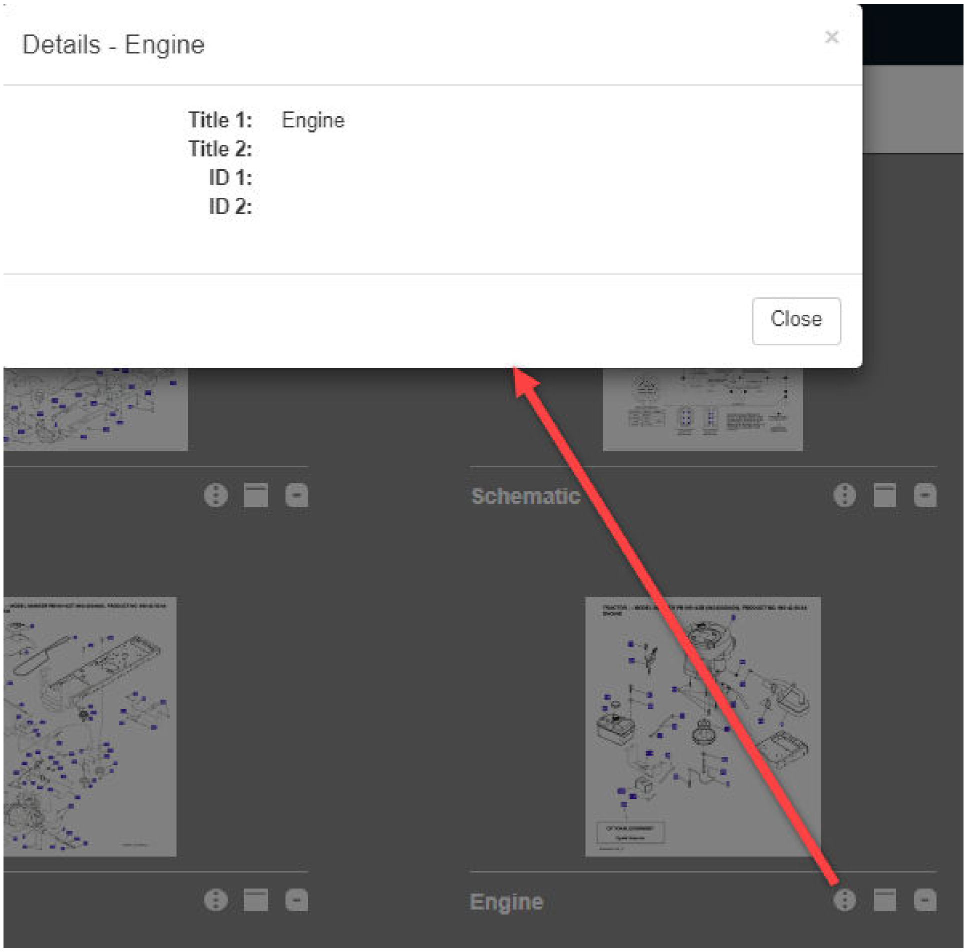


Figure 12-6. Individual Parts List Thumbnail Images

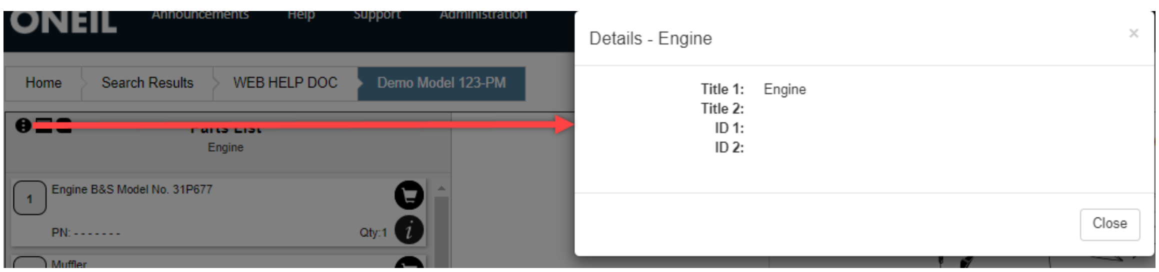


Figure 12-7. Individual Parts Lists

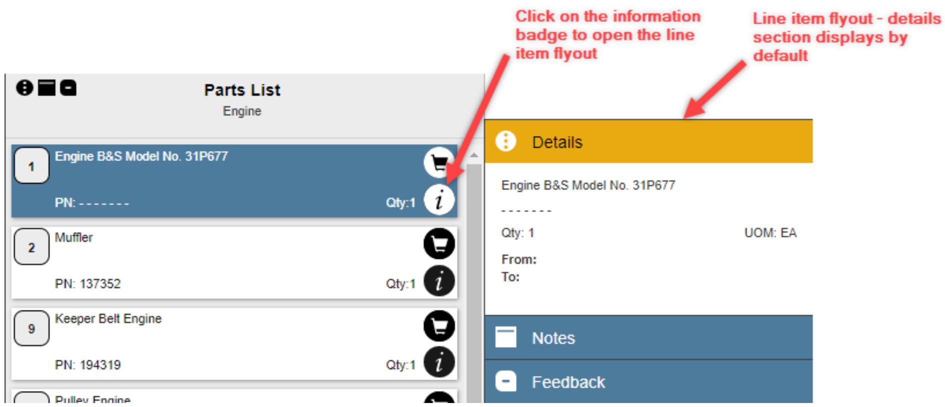


Figure 12-8. Line Item Flyouts

Notes Icon

The Notes icon, like the Details and Feedback icons, appears in several places throughout the Client and across all content types.

1. TOC Overlay

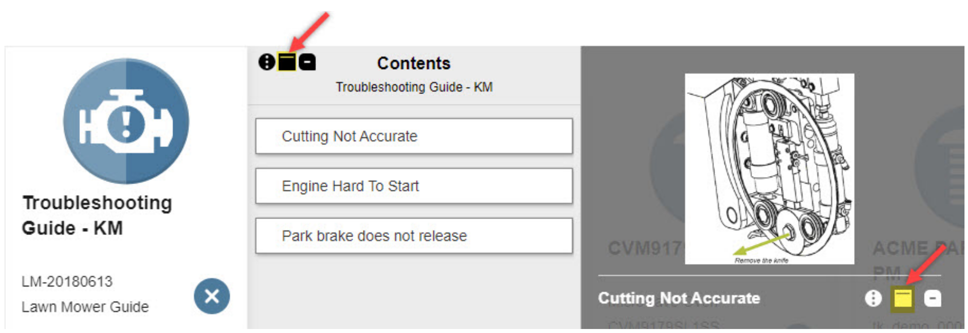


Figure 12-9. TOC Overlay

2. Contents Pane

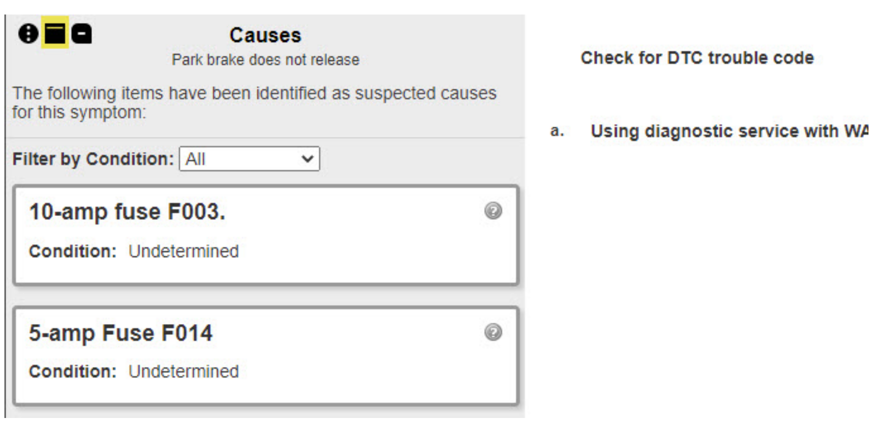


Figure 12-10. Contents Pane

3. Flyout for Each Line Item

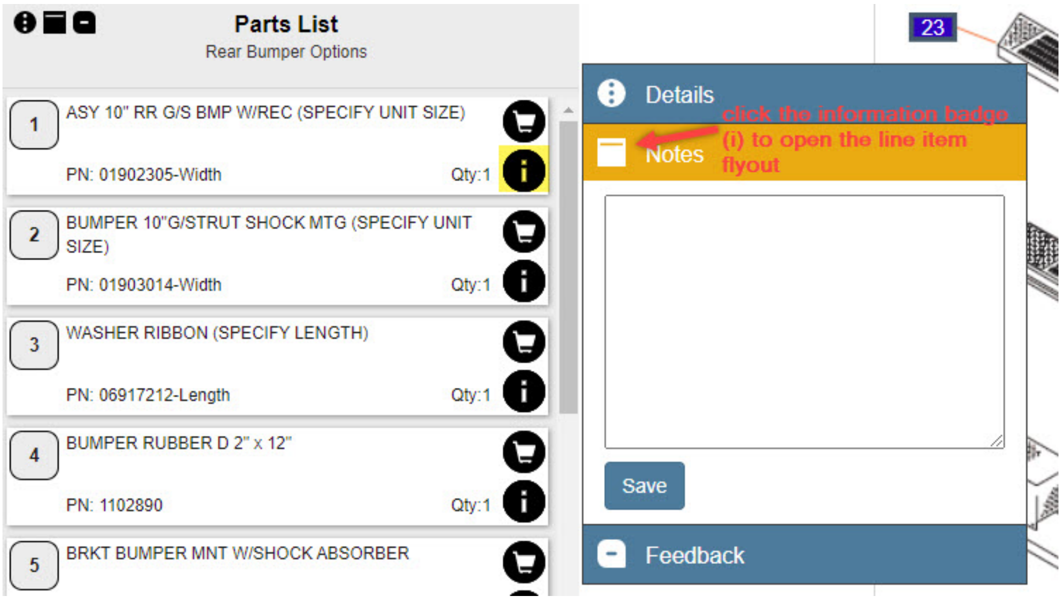


Figure 12-11. Flyout for Each Line Item

To Add a Note

1. Click on the note icon for the desired item of content.
2. A blank pop-up window will open.

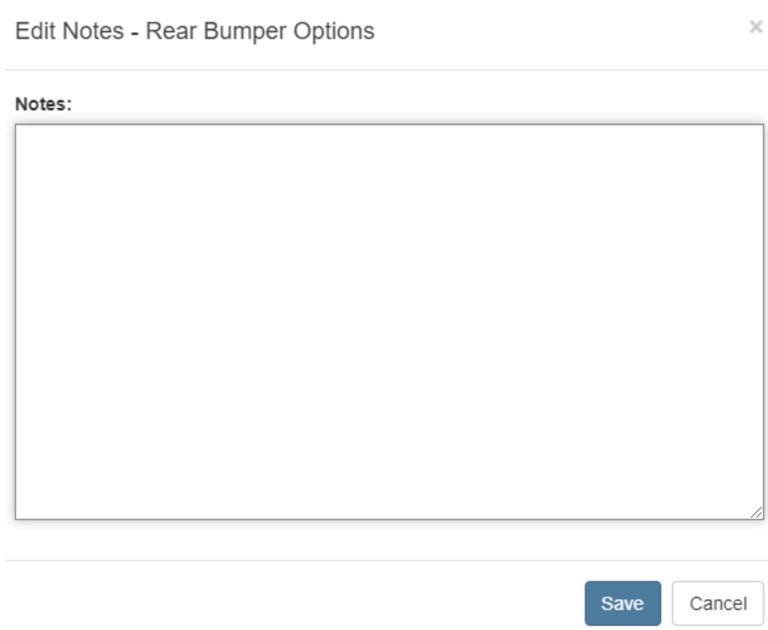


Figure 12-12. Notes Window

3. Enter the note. You can resize the notes window according to preference by dragging the mouse on the lower right corner of the window.

Figure 12-13. Resizing the Window (optional)

4. Click on the **Save** button when finished.
5. The Notes window will close and the Notes icon will change to green to indicate a note is available.

Figure 12-14. Active Note Indicator

NOTE: The tooltip text will change from Add Note to View Note when the user hovers the mouse over the Note icon.

Feedback Icon

The Feedback icon, like the Details and Notes icons, appears in several places throughout the Client and across all content types.

1. On the TOC Overlay

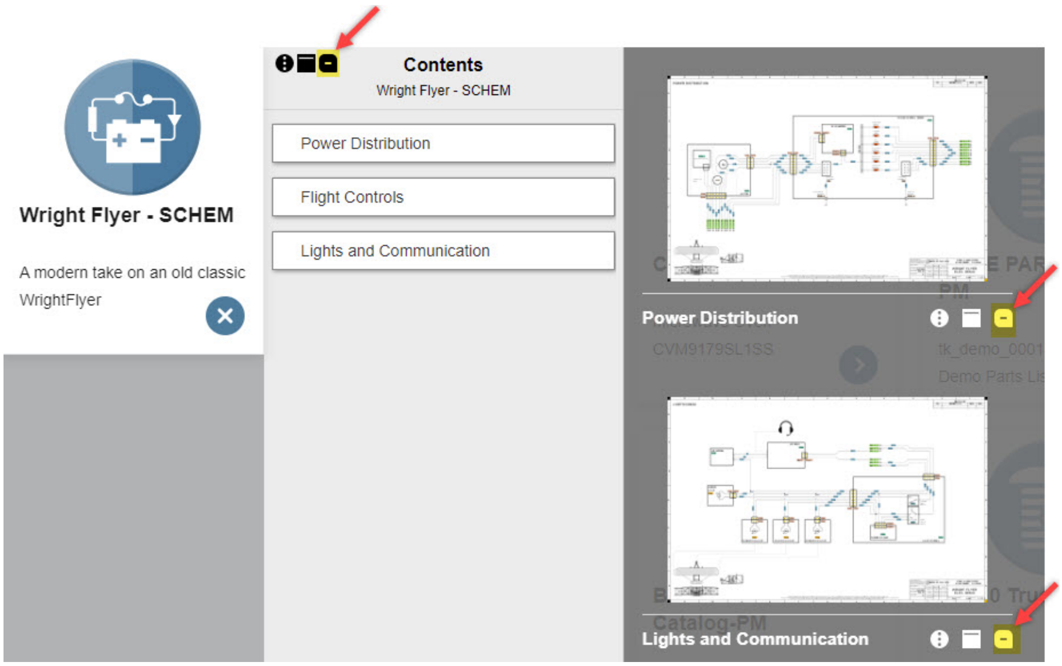


Figure 12-15. TOC Overlay

NOTE: In the screenshot above, there are feedback icons at the publication level (Wright Flyer - SCHEM) shown in the list of contents, as well as at the chapter or section level (individual schematic sheets like Power Distribution, Lights and Communication, etc.).

2. On the Components Pane for Schematic Publications

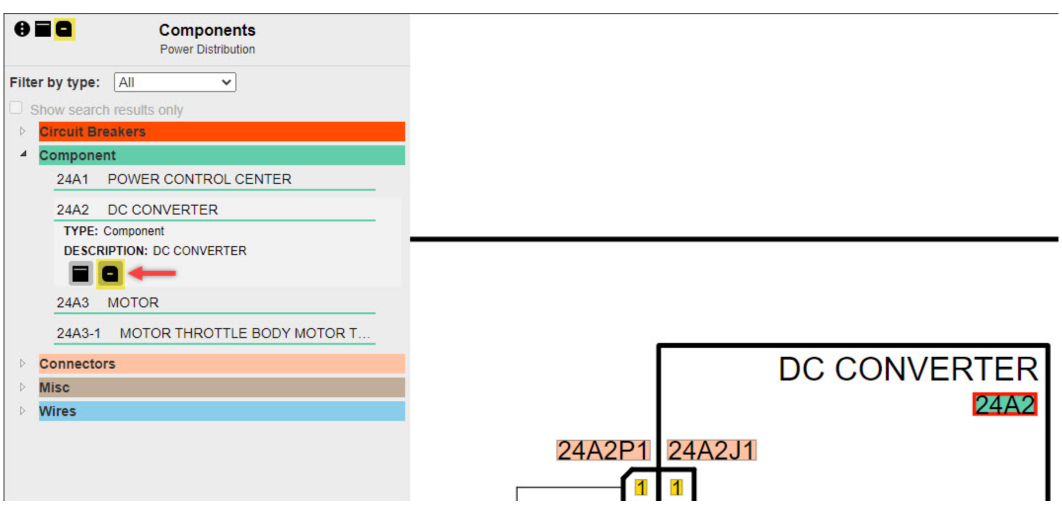


Figure 12-16. Components Pane

NOTE: In the screenshot above, there are feedback icons at the Schematic sheet level (Power Distribution) and at the component level (e.g., DC Converter).

3. On Line Item Flyouts for Parts Lists

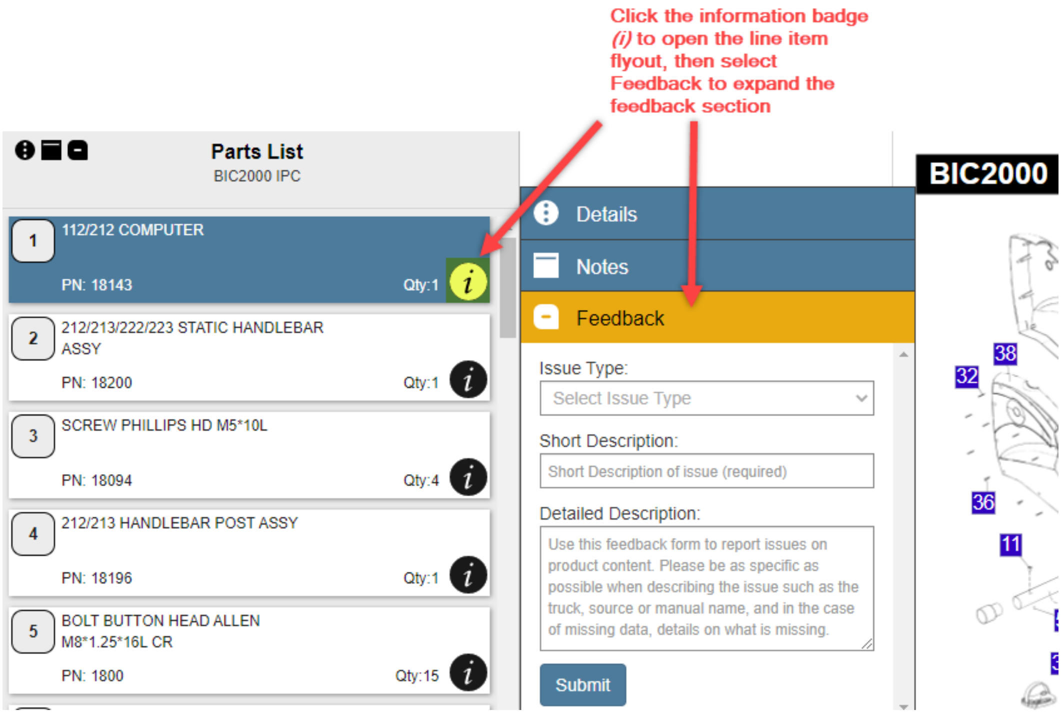


Figure 12-17. Line Item Flyout

NOTE: In the screenshot above, there are feedback icons at the parts list level (BIC2000 IPC) as well as the line item level (by clicking the information badge).

Users should use the feedback icon closest to the item in the viewer they want to submit feedback on. For example, if there is an issue with a specific line item in a parts list, use the feedback icon for that line item instead of the feedback icon applicable to the whole parts list.

To Submit a Feedback

1. Click on a feedback icon. In this example, an issue was found with a specific line item in a parts list.

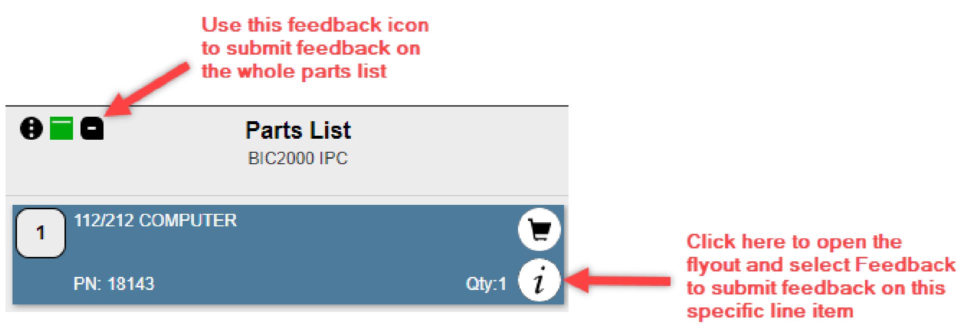


Figure 12-18. Parts List Feedback Icons

2. Click on the information icon for the line item to open the flyout and select the Feedback tab.

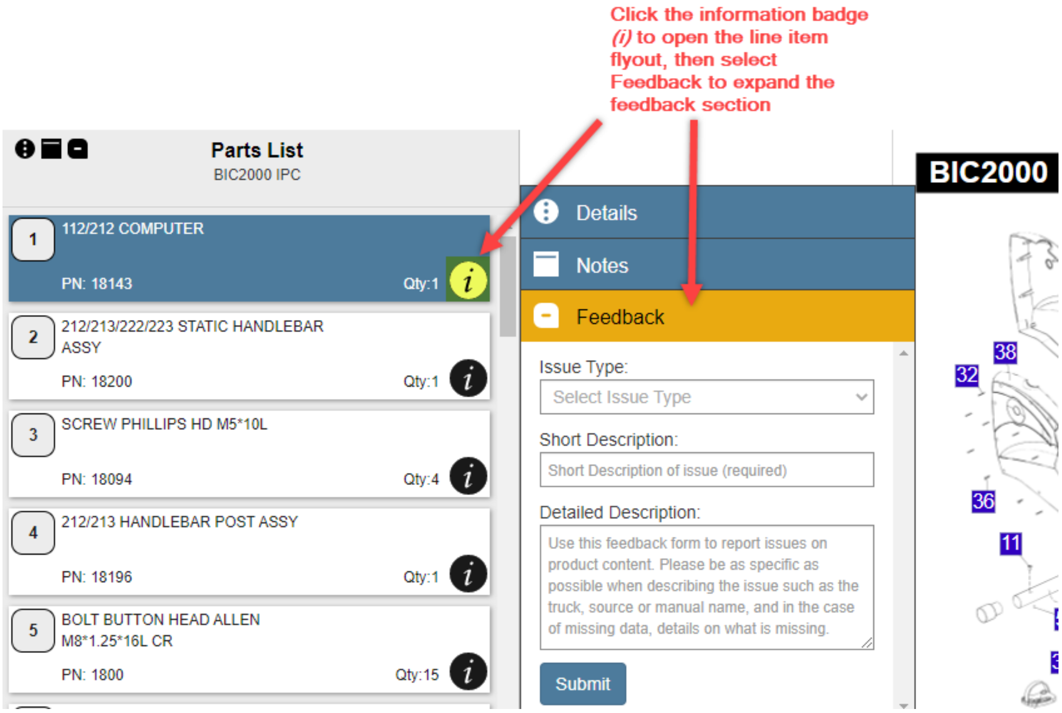


Figure 12-19. Line Item Flyout - Feedback Tab

3. Select an issue type from the drop-down list.

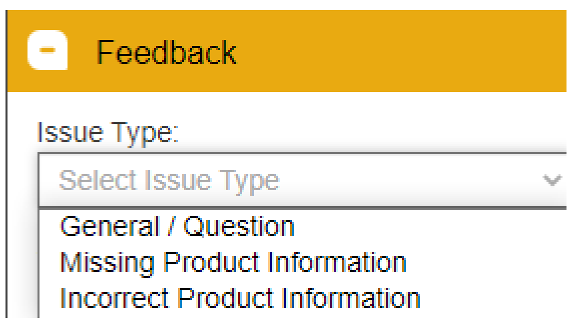


Figure 12-20. Feedback - Issue Type Drop-Down

4. Enter a brief description (required).

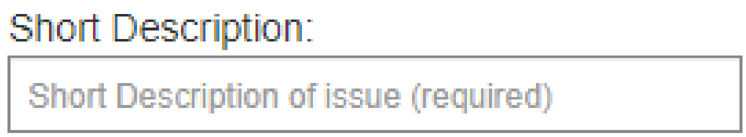


Figure 12-21. Short Description Window

5. Add a detailed description.

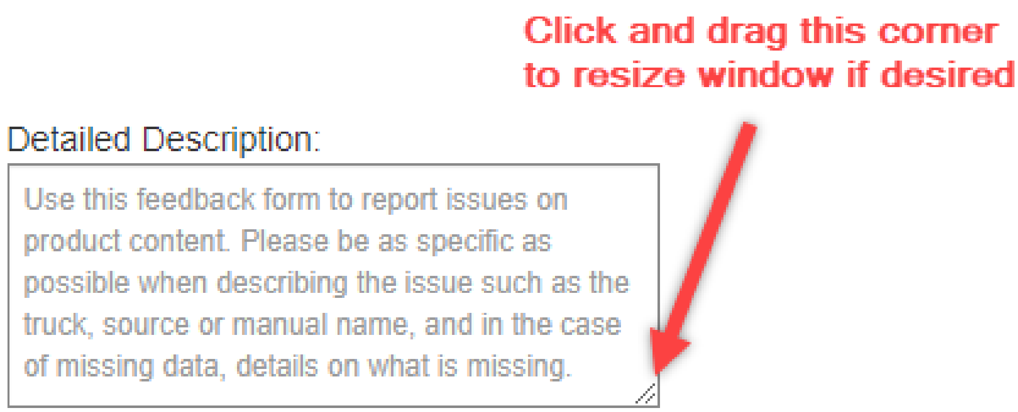


Figure 12-22. Feedback - Detailed Description Window

6. Click on the **Submit** button to send the feedback to the support team.
7. Click on the information badge again to close the line item flyout.

Announcements and Alerts

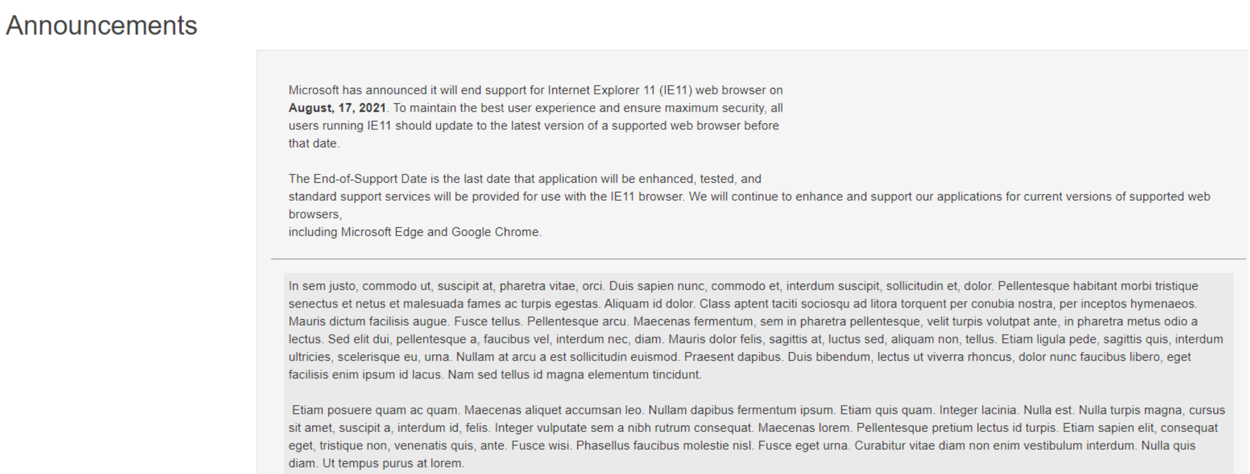
Announcements

Announcements are stored under the **Announcements** tab on the ribbon across the top of the Client. Unread announcements are indicated by a badge or bubble that appears beside the announcements tab.

Figure 13-1. Announcements Tab

NOTE: The number of unread announcements will be displayed inside the badge or bubble.

1. Click on the Announcements tab to display all announcements.



Announcements

Microsoft has announced it will end support for Internet Explorer 11 (IE11) web browser on **August, 17, 2021**. To maintain the best user experience and ensure maximum security, all users running IE11 should update to the latest version of a supported web browser before that date.

The End-of-Support Date is the last date that application will be enhanced, tested, and standard support services will be provided for use with the IE11 browser. We will continue to enhance and support our applications for current versions of supported web browsers, including Microsoft Edge and Google Chrome.

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Etiam posuere quam ac quam. Maecenas aliquet accumsan leo. Nullam dapibus fermentum ipsum. Etiam quis quam. Integer lacinia. Nulla est. Nulla turpis magna, cursus sit amet, suscipit a, interdum id, felis. Integer vulputate sem a nibh rutrum consequat. Maecenas lorem. Pellentesque pretium lectus id turpis. Etiam sapien elit, consequat eget, tristique non, venenatis quis, ante. Fusce wisi. Phasellus faucibus molestie nisl. Fusce eget urna. Curabitur vitae diam non enim vestibulum interdum. Nulla quis diam. Ut tempus purus at lorem.

Figure 13-2. Displayed Announcements

2. Once the announcements are opened, the badge beside the Announcements tab will disappear.

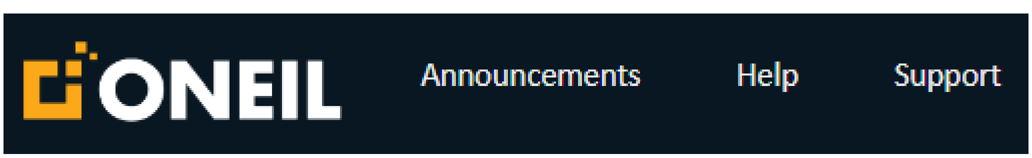


Figure 13-3. Announcements Tab

3. If the announcement requires an acknowledgement, the announcement will display as soon as the user logs onto the Client. They will then need to click on the **Acknowledge** button before doing anything else.

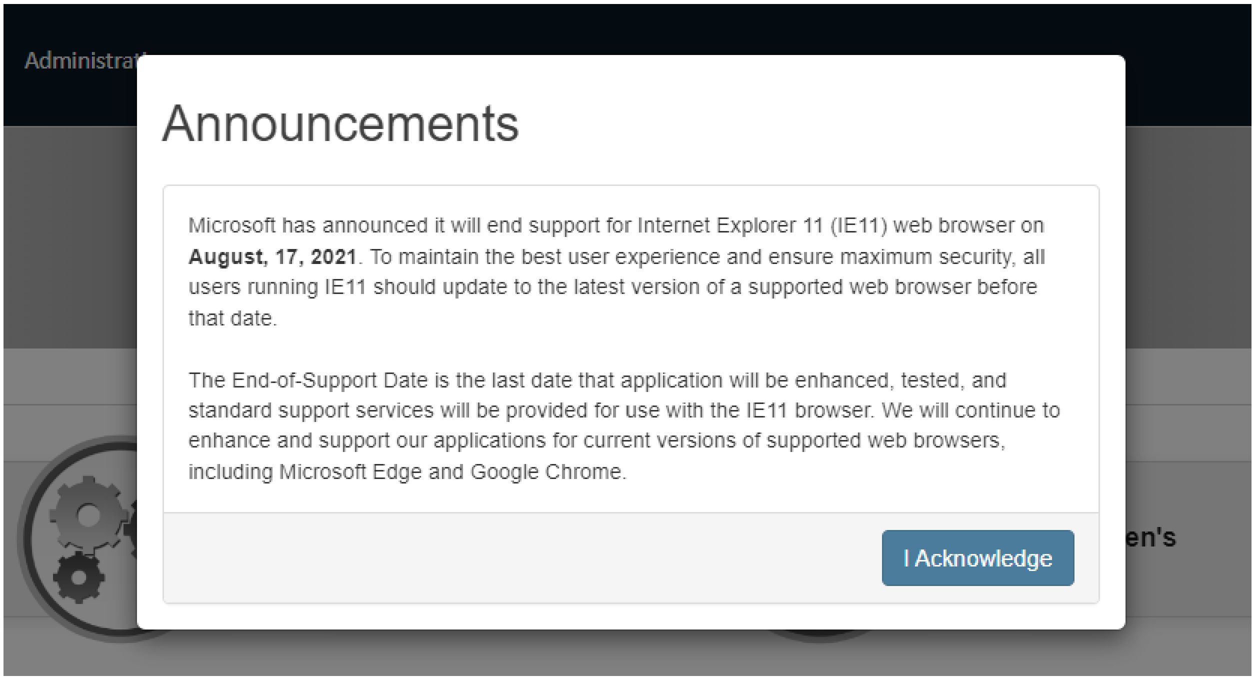


Figure 13-4. Acknowledge Button

4. Once the announcement is acknowledged, it will disappear but will still be accessible on the Announcements tab.

Announcement Management

Administrators should refer to Managing Announcements for managing announcements.

Alerts

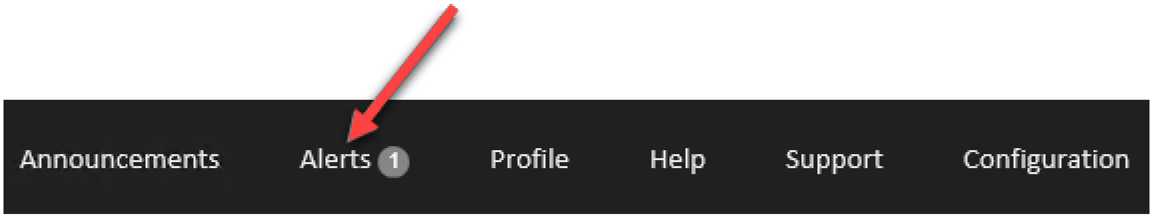


Figure 13-5. Alerts Tab

The Alerts tab was designed for users of the installed version of the ONeSOURCE Client to alert them to updates for their installed datasets. Users of the web version of the Client will not see the Alerts tab.

When there is a counter inside the Alerts badge or bubble, that means there are alerts available. To read the alerts, hover the mouse over the word Alerts. The alert should display in a pop-up window.

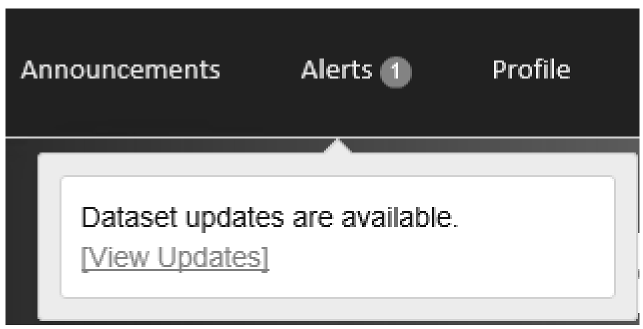


Figure 13-6. Alerts

Click on the **View Updates** link to go to the Configuration page and apply the updates.

User Profile

User Profile - Introduction

Users of the installed Client will see the Profile tab on the ribbon across the top.

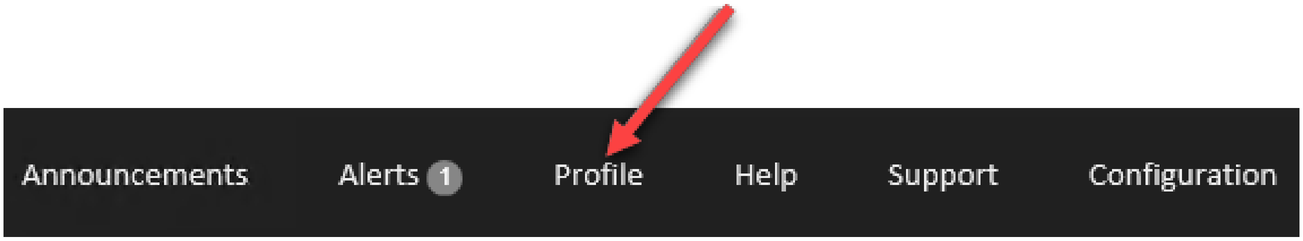


Figure 14-1. User Profile - Installed Client

Users can select the language of the User Interface (UI) from here.

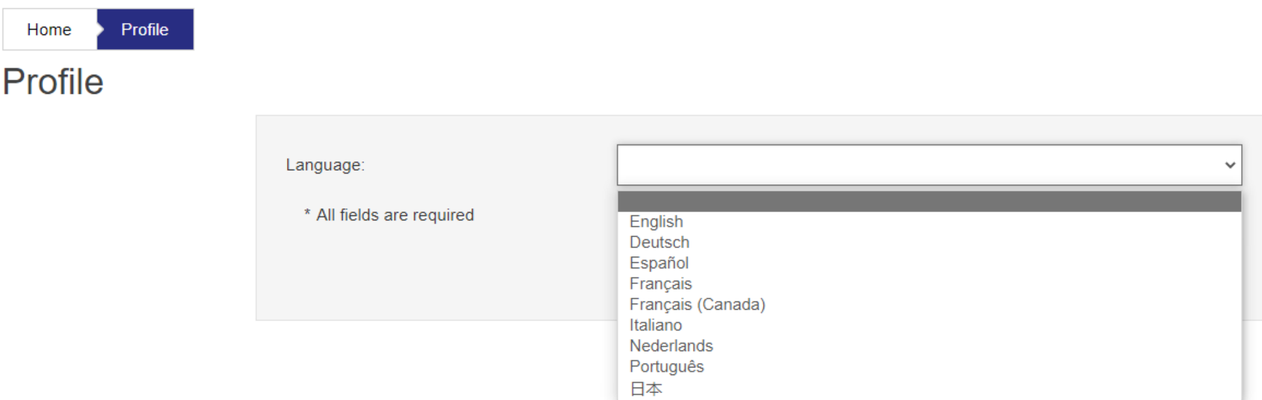


Figure 14-2. Select Language

NOTE: The list of languages displayed in the Language drop-down list is determined by user configuration. The list shown above lists all of the languages currently available.

Users of the web-based Client can find their profile by hovering the mouse over their username on the far right of the ribbon at the top of the page and clicking on the **Profile** button.

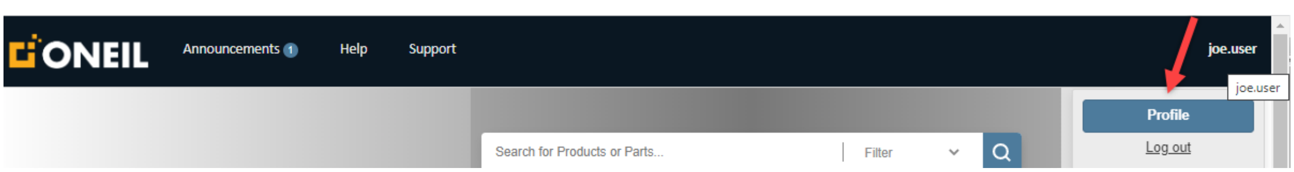


Figure 14-3. User Profile - Web-Based Client

The Profile on the web-based Client has several fields the user may edit.

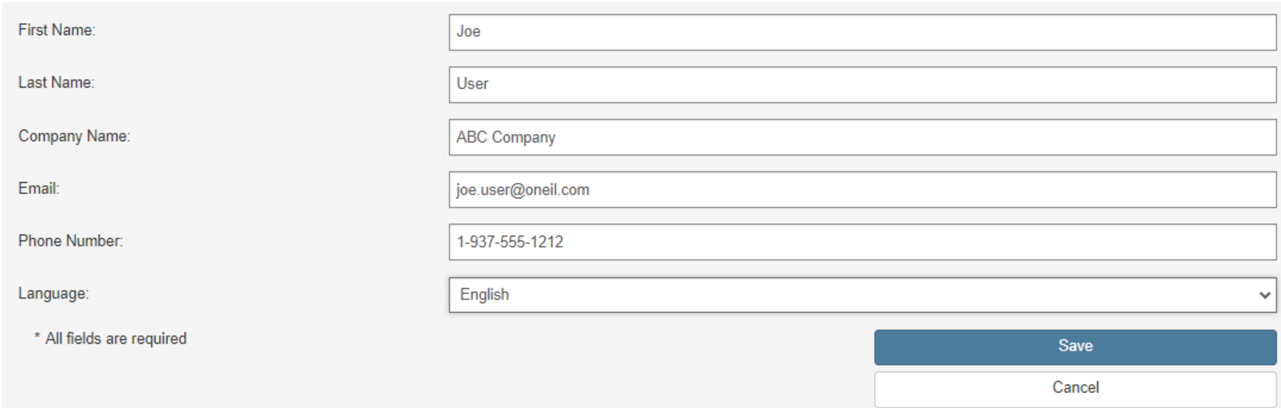


Figure 14-4. Profile Screen

Managing Your Profile

To Edit Profile Information:

1. Click on the **Profile** button in the drop-down under the user name.

Figure 14-5. Profile Button

2. The Profile page displays.

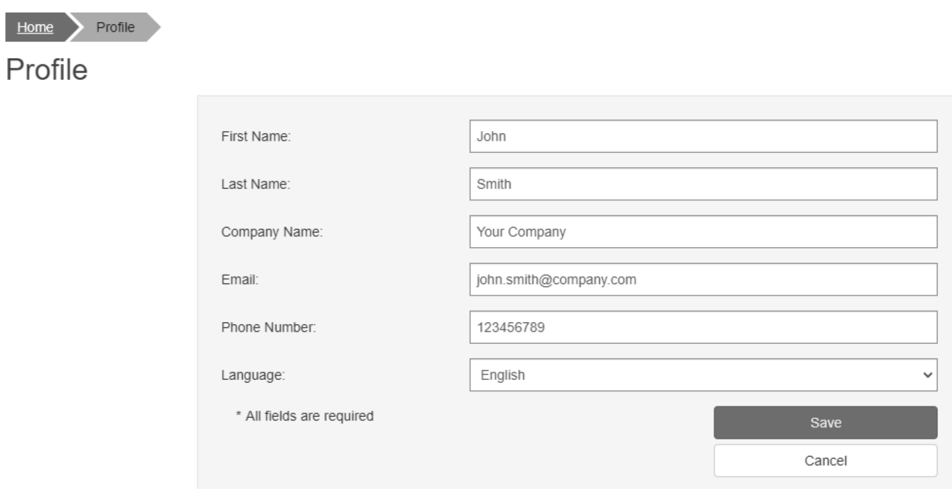


Figure 14-6. Profile Screen

3. Edit any fields as needed.

NOTE: Please note that all fields are required. If any field is not filled, the system will not save any changes to the profile.

4. Click the **Save** button to save your edits.

Help

Help

Click on the Help tab on the ribbon that displays across the top of the ONeSOURCE Client to open a PDF of the Help document. Based on the language the user selected in the user's Profile, the Help document should display in the language they selected.

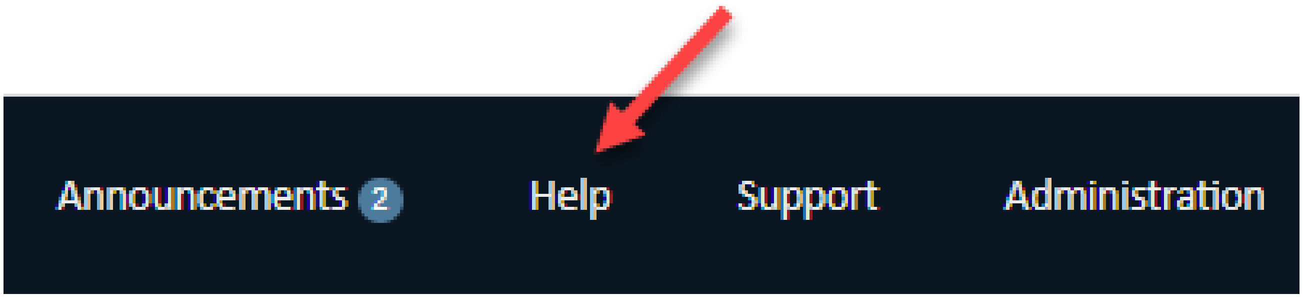
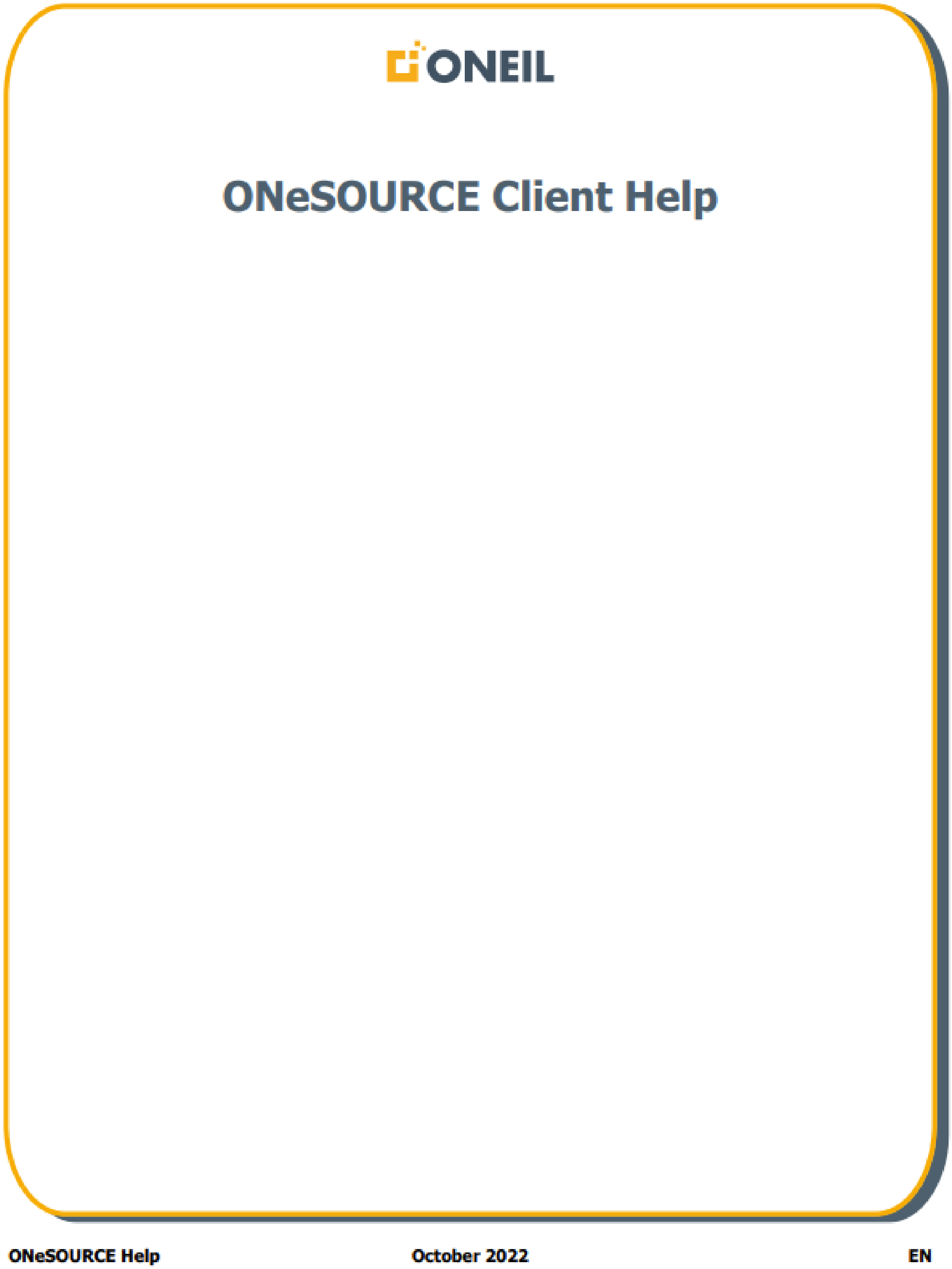


Figure 15-1. Help Tab



ONeSOURCE Client Help

ONeSOURCE Help October 2022 EN

Figure 15-2. Help Document PDF

Table of Contents

Figure 15-3. Help Document TOC (Excerpt)

Refer to User Profile - Introduction for more details on setting the default language.

Support Page (Feedback)

Support Page

The Support tab that appears at the top of the ONeSOURCE Client is another avenue for users to submit feedback to the support team.

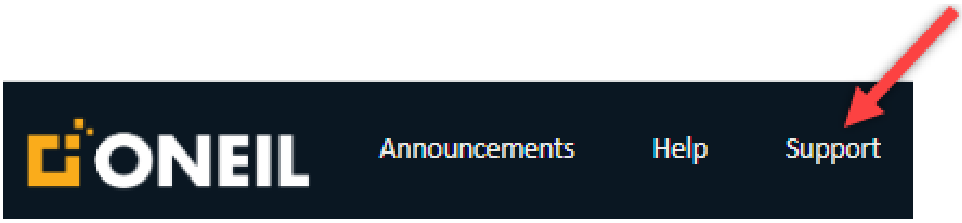


Figure 16-1. Support Page Link

While the other feedback icons are appropriate for sending feedback on specific items of content at the publication or lower level, users can use the Support tab to submit feedback on the ONeSOURCE Client in general, or on installation or update issues for users of the installed version of the Client.

See the section Feedback Icon for details on other feedback options throughout the Client.

Sending Feedback

The Support tab displays the Send Feedback page as well as a support e-mail address to contact for assistance.

To Submit Feedback

1. Click on the Support tab in the ribbon across the top of the ONeSOURCE Client screen.

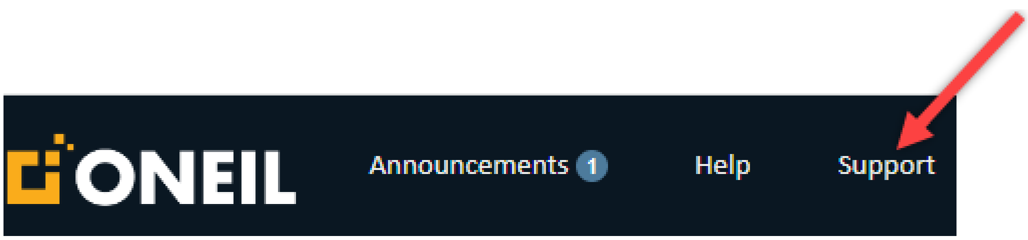


Figure 16-2. Support Page Link

2. The Send Feedback page will open.

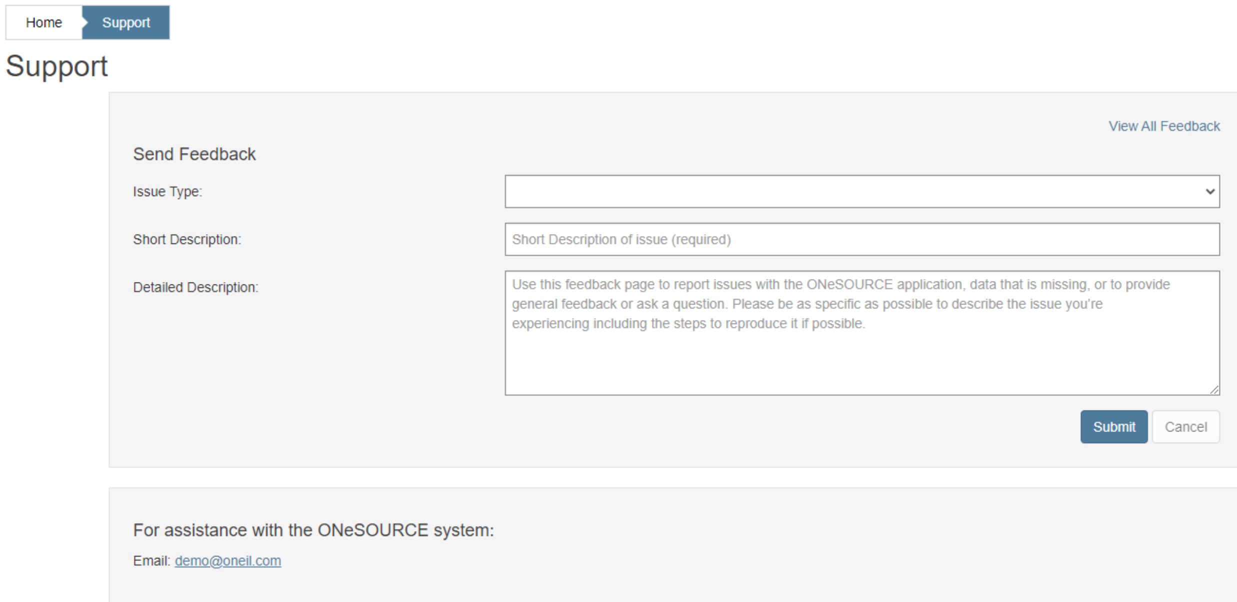


Figure 16-3. Support Page

NOTE: The View All Feedback link on the Send Feedback page allows users to view feedbacks they have submitted in the past. Refer to Viewing Feedback History for more information.

3. Select an issue type from the drop-down list.

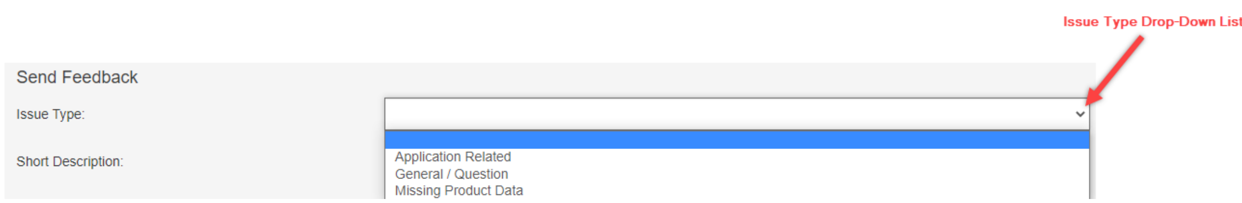


Figure 16-4. Issue Type Drop-Down List

4. Add a brief description of the issue (required).
5. Enter details in the Detailed Description text box. The text area can be resized by clicking and dragging on the bottom right corner of the text box.

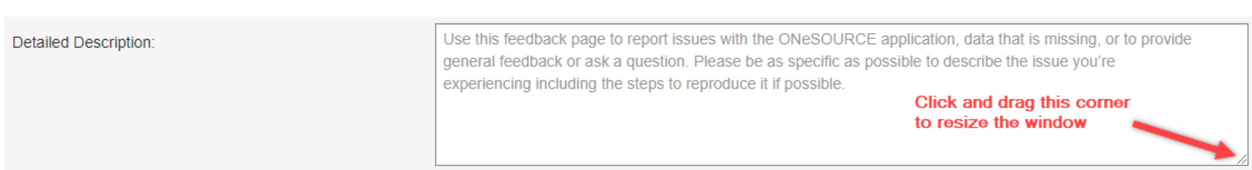


Figure 16-5. Detailed Description

6. Click the **Submit** button to send the issue to the support team.

NOTE: Some customer configurations may also include an applicability field on the Send Feedback form that can be used by Administrators to sort and view feedbacks on this applicability. As an example, a customer's ONeSOURCE Client instance could be configured to include a region applicability. The field would display above the Issue Type field.

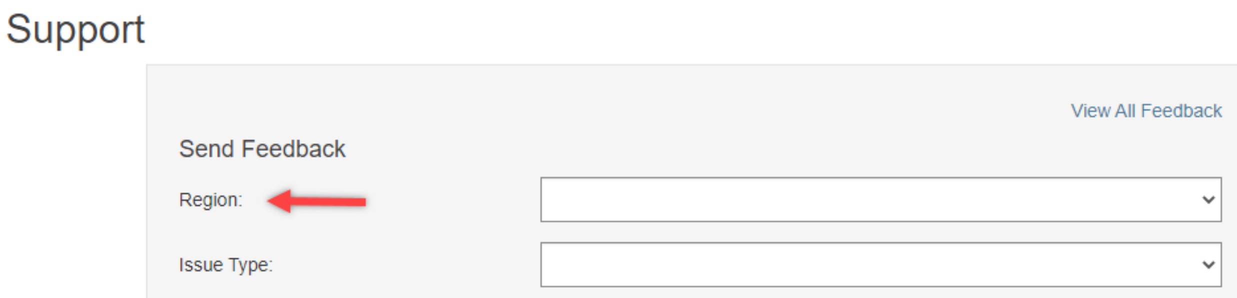


Figure 16-6. Additional Applicability Field - Configurable

To Send an E-mail to the Support Team

1. Click on the e-mail address provided at the bottom of the Support page.

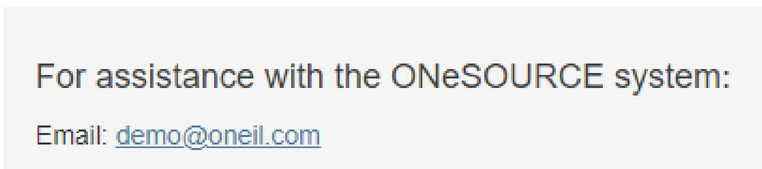


Figure 16-7. Support E-Mail Address

NOTE: E-mail address in the screenshot shown as an example.

2. A blank e-mail should open addressed to the support e-mail address.

NOTE: If a new e-mail does not open, copy the support e-mail address and open your mail application manually to create the e-mail.

Viewing Feedback History

Users of the web version of the ONeSOURCE Client can view feedbacks they previously submitted via a link on the Support page. This link is not present in the installed version of the Client.

1. To open the Support page, click on the Support tab displayed at the top of the ONeSOURCE Client.

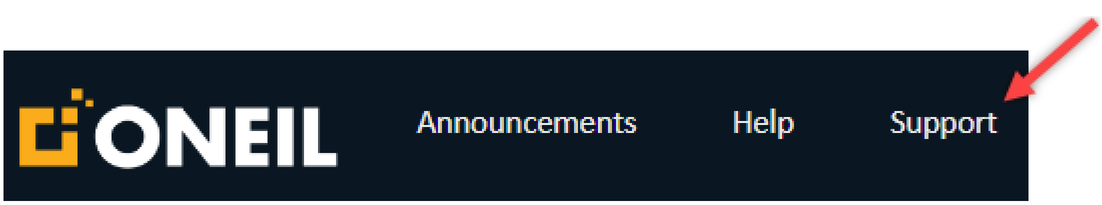


Figure 16-8. Support Page

2. The Support page will open.
3. Click the **View All Feedback** link from the top of the feedback section.

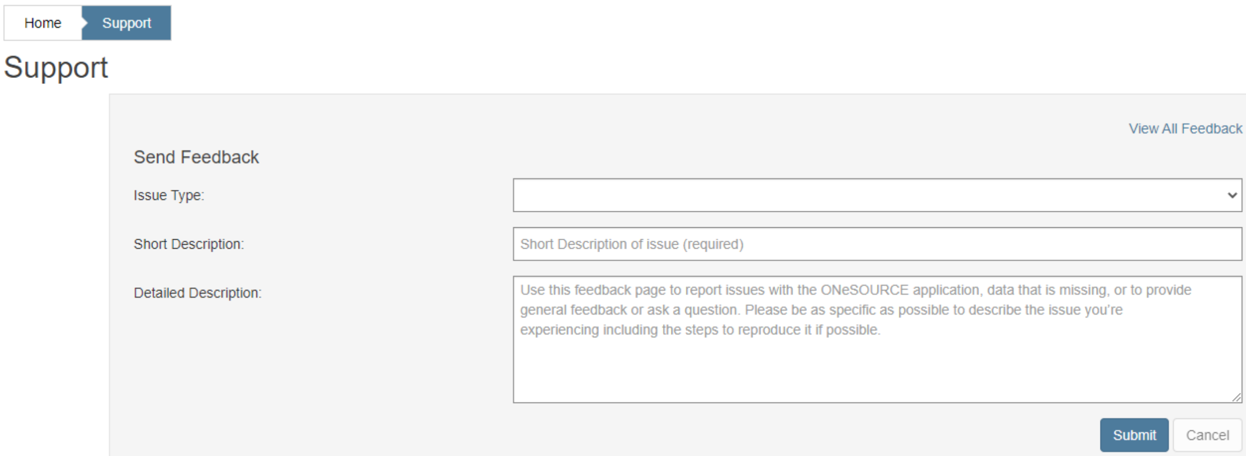


Figure 16-9. View All Feedback Link

4. The Feedback page will open.

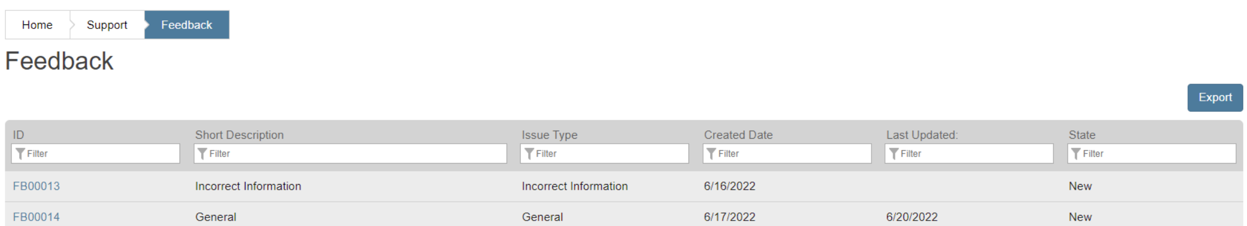


Figure 16-10. Feedback Page

NOTE: Displayed feedback is feedback the user has submitted up to this point. If it is difficult to find a specific feedback, users can enter keywords in the various filter windows to reduce the number of feedback records appearing in the list.

5. From the Feedback page, users can open old feedback entries by clicking on the feedback ID.

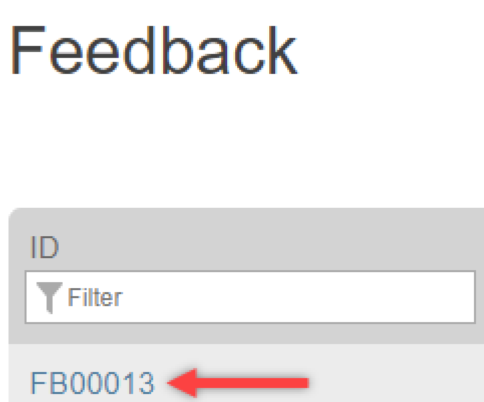


Figure 16-11. Feedback Entry ID

6. The Manage Feedback page will open.

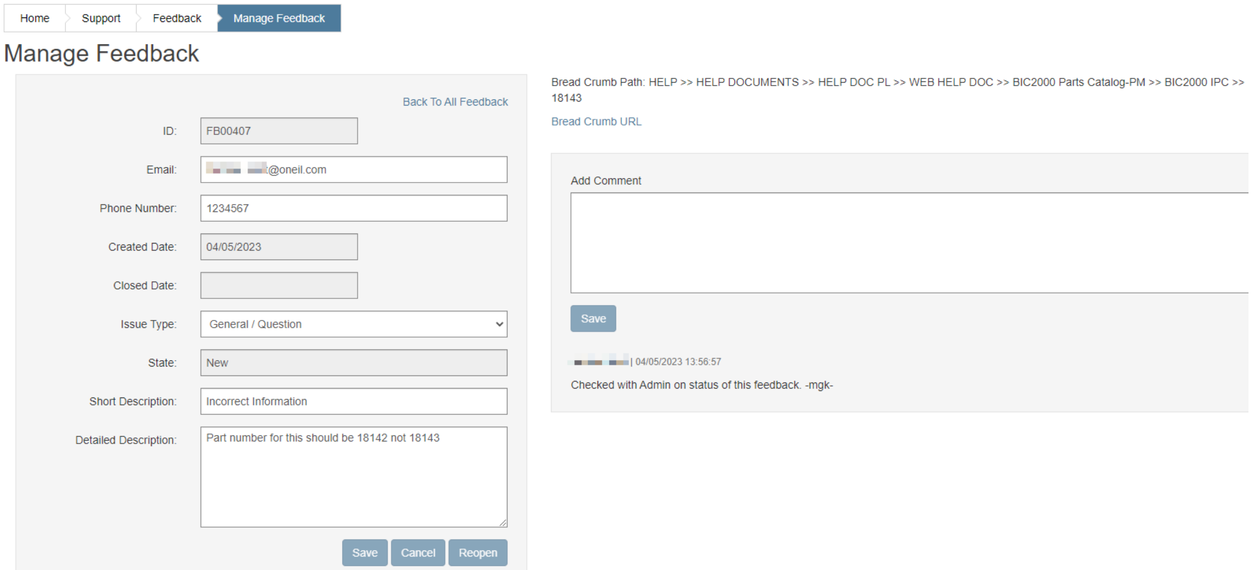


Figure 16-12. Manage Feedback Page

7. If no changes are needed, users can click on the **Back to All Feedback** link or the browser back button to return the Feedback page.
8. Users can make changes to non-shaded fields and add new comments if desired, and then save their changes by clicking on the **Save** button.
9. By clicking on the **Bread Crumb URL** link, a new browser window will open and take users directly to the source data where the feedback was initiated.

Editing Feedback - User

Users can go back and edit feedback entries they have submitted (only included in the web version of the ONeSOURCE Client).

1. To edit a previously submitted feedback, click the **Support** tab at the top of the ONeSOURCE Client.

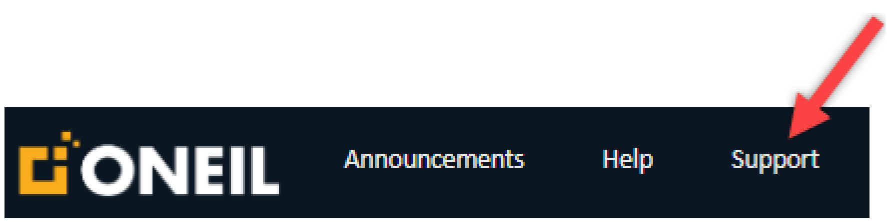


Figure 16-13. Support Page Link

2. Click the **View All Feedback** link on the Support page.

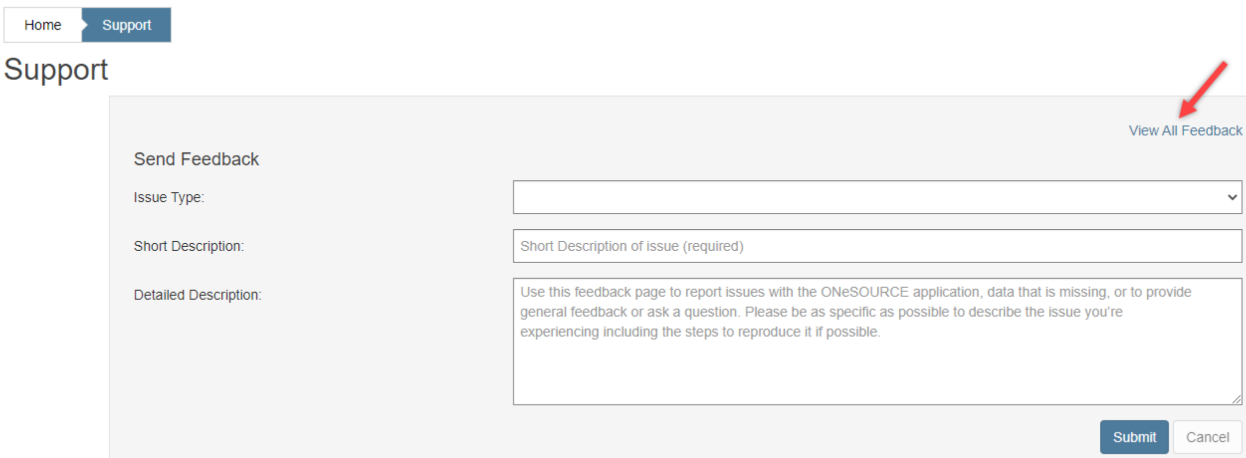


Figure 16-14. View All Feedback Link

3. Click the ID of the desired feedback entry.

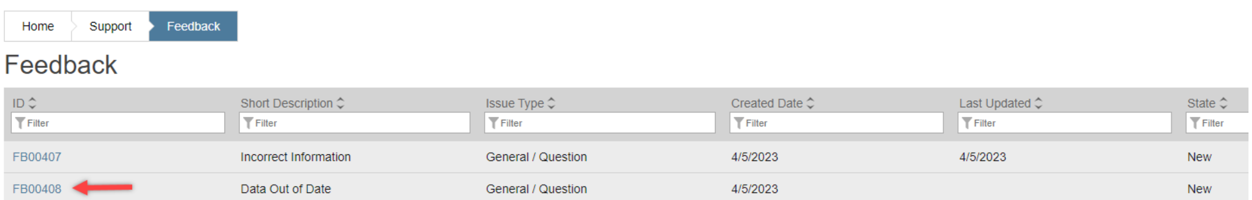


Figure 16-15. Feedback Entry ID

4. The **Manage Feedback** page will open.

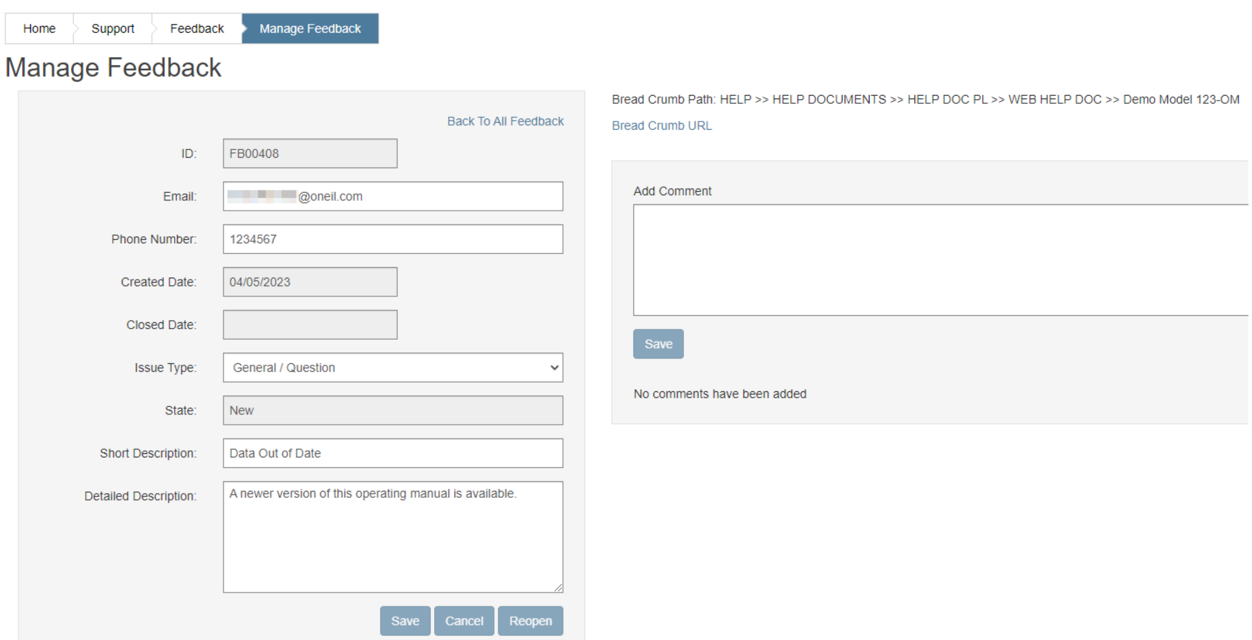


Figure 16-16. Manage Feedback Page

NOTE: The **Save**, **Cancel**, and **Reopen** buttons are inactive until the user has made edits to the feedback or it has been closed.

5. When the user clicks the **Save** button, the user's edits are saved and they are returned to the list of feedback entries.
6. When the user clicks the **Cancel** button after making a change to the feedback, the following pop-up window will display.

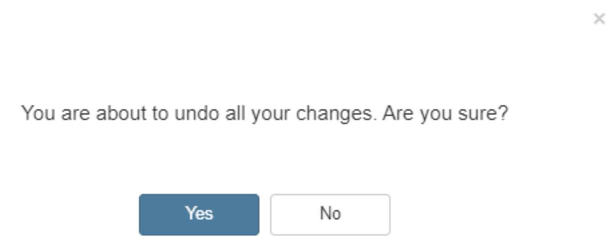


Figure 16-17. Pop-Up Message

7. By clicking the **Yes** button, the user's changes will not be saved and the user will be returned to the Feedback page with the list of all feedback entries.
8. By clicking the **No** button, the pop-up window will close and keep the user on the Manage Feedback page.
9. If the feedback has been closed (indicated by Closed in the State field and by all fields being inactive), users may click the **Reopen** button to change the status from Closed to Active in order to make new edits.
10. When a feedback is updated by the user, the system will send an e-mail to both the user and the Administrator with the following information:
    - Feedback ID number
    - Company (user's company name)
    - State (set by the Administrator)
    - Issue Type
    - Short Description
    - Detailed Description
    - Application Version
    - Dataset Version
    - Username
    - Breadcrumb (if one exists)
    - Comment By (name of person who left a comment)
    - Comment
    - Summary of change made
    - A link to the Manage Feedback page for the specific feedback

11. Following is a sample e-mail received by the user after editing a feedback.

(TST) Feedback from ONeSOURCE ONA Client

ONeSOURCE <noreply@oneil.com>

To OneSourceSupport;

Reply | Reply All | Forward

Wed 10/30/2024 10:36 AM

The feedback issue 392 has been updated. Please review the feedback summary below.

====================================
Issue Summary
====================================

Feedback ID:	392
Feedback From:	
Company:	O'Neil
State:	Active
Assigned To:	
Issue Type:	Incorrect Information
Short Description:	Part is for LH not RH
Detailed Description:	Brace shown in the parts diagram is actually for the LH, not the RH.

Changes:

Assigned To: changed from not assigned

Although this e-mail and any attachments are believed to be free of any virus or other defect which might affect any computer system, it is the responsibility of the recipient to check that it is virus-free and the sender accepts no responsibility or liability for any loss, injury, damage, cost or expense arising in any way from receipt or use thereof by the recipient.

The information contained in this electronic mail message is confidential information and intended only for the use of the individual or entity named above, and may be privileged. If the reader of this message is not the intended recipient, you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this transmission in error, please contact the sender immediately, delete this material from your computer and destroy all related paper media. Please note that the documents transmitted are not intended to be binding until a hard copy has been manually signed by all parties.

Thank you.

© 2024

Figure 16-18. Sample User Feedback E-Mail

Configuration Page (Installed Client Only)

Configuration Page

The Configuration page is where users of the installed Client can uninstall and install datasets, and apply updates to them and the ONeSOURCE Client application. From this page, users can also set datasets to be updated automatically.

Updating Datasets

Since content for sources is updated regularly, it is necessary to periodically update installed datasets in order to bring them up to date with the latest content. The ONeSOURCE Client provides ways for users to update installed datasets, within the application, either automatically or manually on demand.

Updating Datasets Automatically

To apply updates automatically, place a check mark in the Automatically Update box beneath each installed dataset, which is located on the Configuration page of the Client. The Client will then check once a day for new content and update the dataset if new content is found.

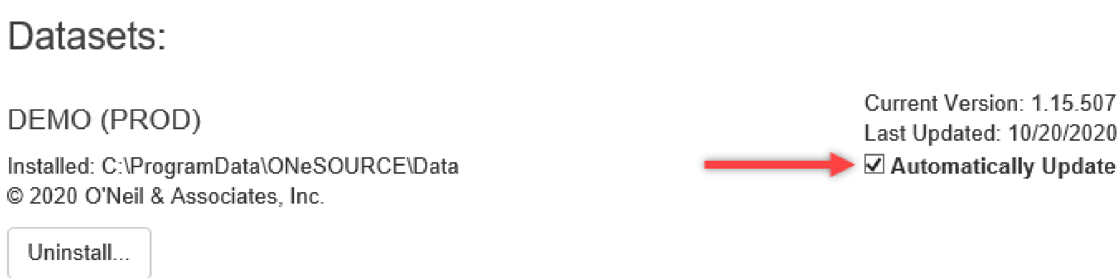


Figure 17-1. Configuration Page

Updating Datasets Manually

Updates can also be applied manually. Even if the box is not checked to apply updates automatically, the tool checks for updates in the background and sends alerts if updates are available. There are a few ways the application notifies users of dataset updates:

a. ***Receiving Alerts***

   The Alerts tab displays on most screens of the application. When an alert is present, a bubble displays next to the Alerts tab with a number indicating the number of alerts present. By hovering the mouse over this tab, a pop-up window will display the alert.

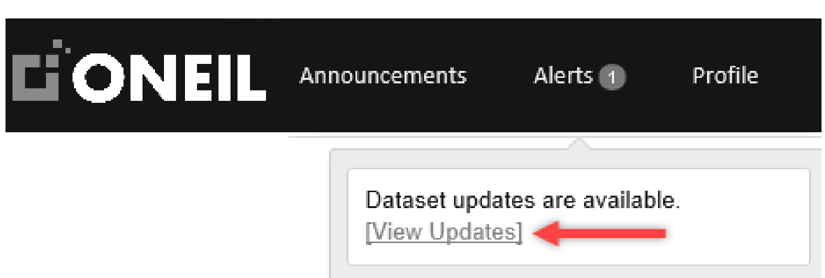


Figure 17-2. Alerts

Clicking on the View Updates link takes users to the Configuration page where they can apply the updates.

b. ***Checking the Configuration page***
When an update is available, a notification appears next to the dataset on the Configuration page.

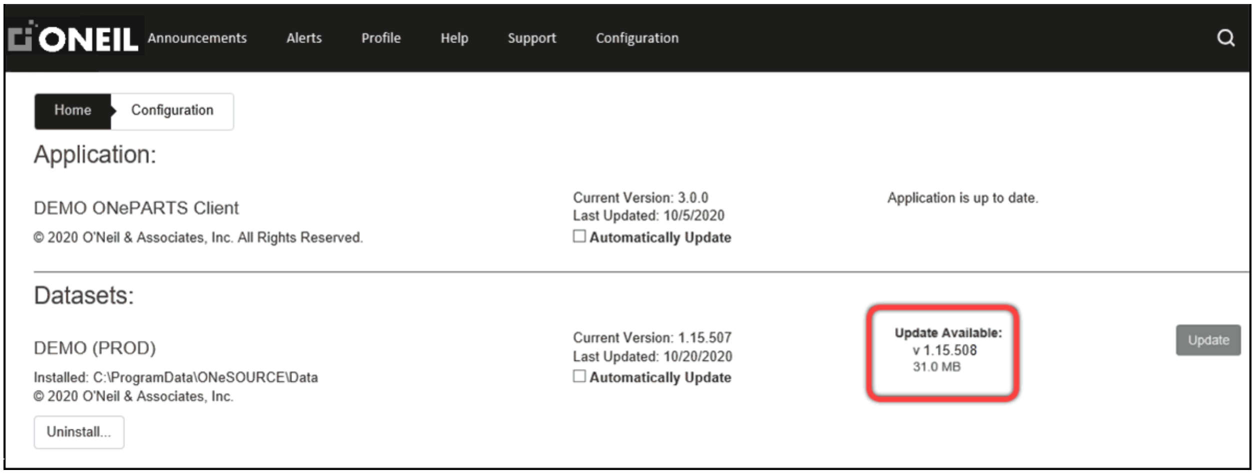


Figure 17-3. Configuration Page

Clicking on the **Update** button applies the update.

Checking for Updates
Clicking on this button checks for updates to both the application and installed datasets.

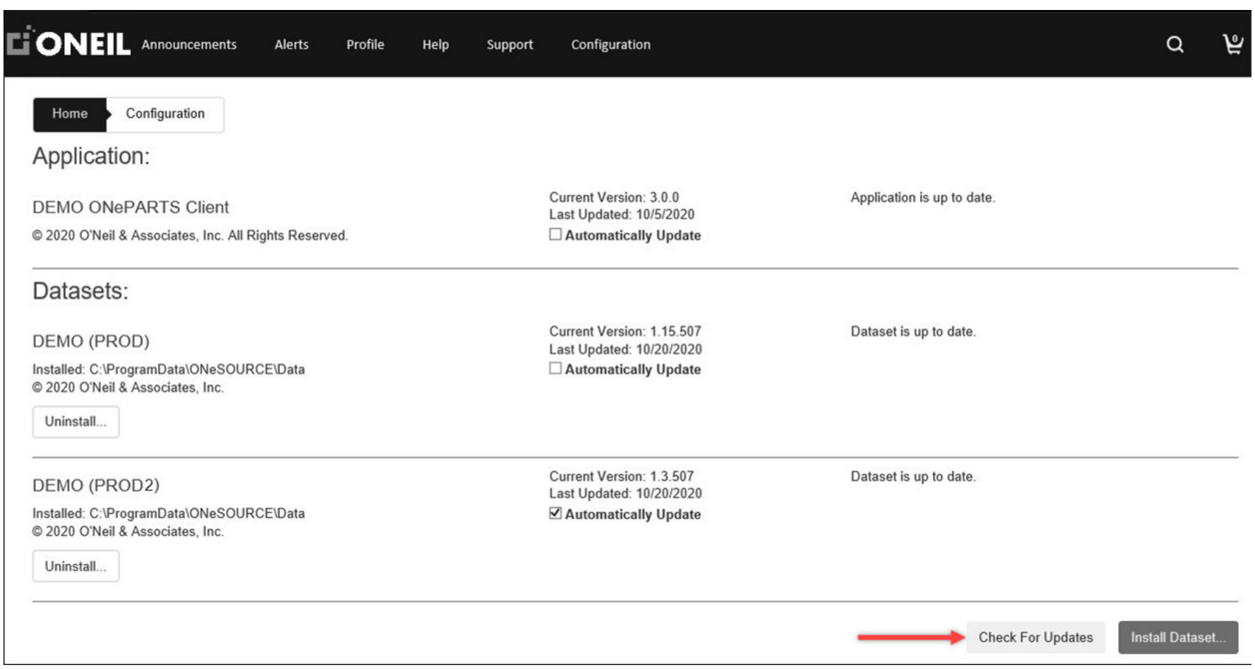


Figure 17-4. Check for Updates

If updates are available, the following pop-up message displays.

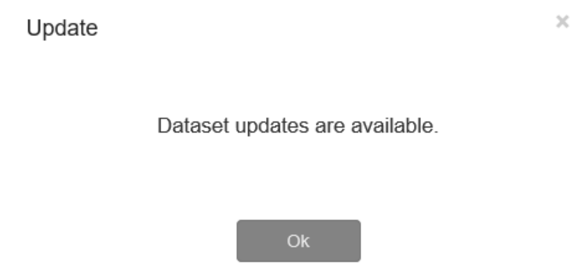


Figure 17-5. Pop-Up Message

The status displayed next to the dataset will change from **Dataset is up to date** to **Update Available**. Clicking the **Update** button will apply the update.

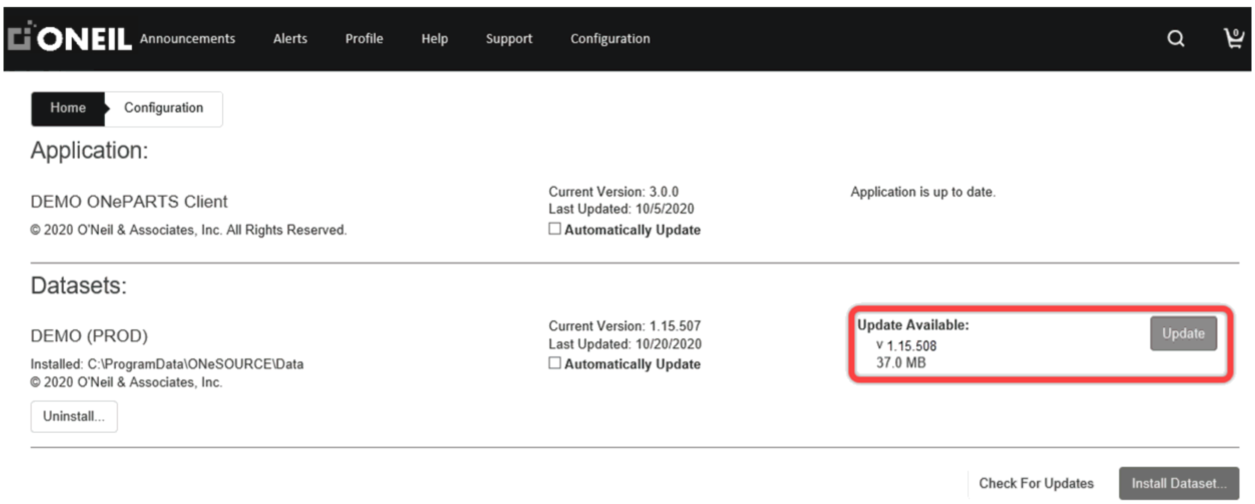


Figure 17-6. Update Button

The system may also prompt the user to Restart the ONeSOURCE Client following an update. When it does, click on the Restart button to do the restart. After it's complete, the dataset will show that the dataset is up to date.

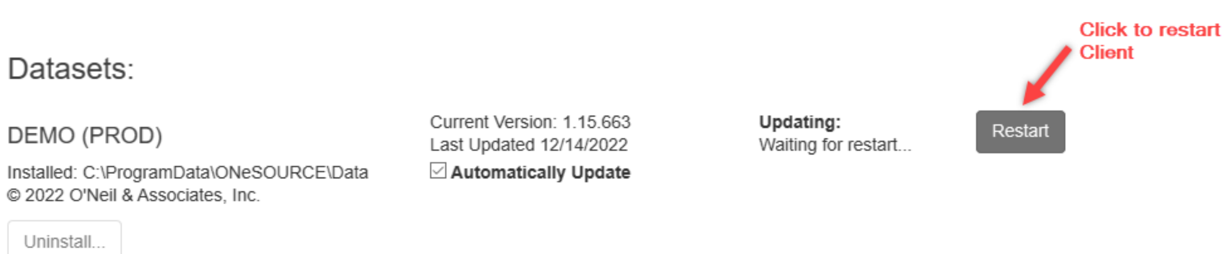


Figure 17-7. Restart Button

If no updates are available, this pop-up message will display instead.

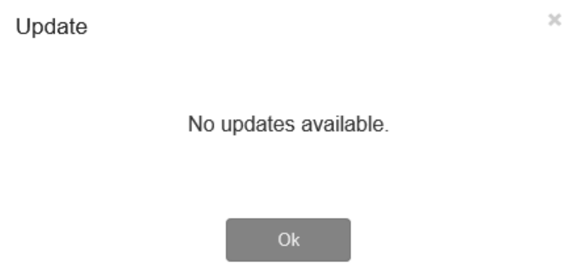


Figure 17-8. Pop-Up Message

Installing Datasets

Users of the installed Client must install datasets in order to use the application. This is usually done at the same time the application is installed on the user's desktop. Use the following instructions to install another dataset or to uninstall a currently installed dataset and install it again.

1. Download the dataset to the user's local machine to a location you can easily remember. Recommended locations are the Downloads folder or the desktop.

NOTE: Depending on the user's configuration, the user may need to click on a link to download the dataset or download it from a third-party application.

2. Open the ONeSOURCE Client and go to the Configuration page.
3. Click on the Install Dataset button.
4. Click on the Browse button and navigate to the location of the dataset you downloaded in step 1.
5. Once the dataset is located, click the Select button.

NOTE: If you do not see the dataset listed, make sure the dataset you downloaded has an extension of .ona. Some customers may download the dataset as a zipped file and may need to unzip the file first to get to the .ona file.

6. The application will start installing the dataset provided there is enough space on the user's machine. When installation is complete, the progress bar should show 100% and the Continue button should be active.

NOTE: Some customers may need to enter a product key prior to installing the dataset. If so, the user will be prompted to enter it.

7. Click on the Continue button.
8. The application should take the user to the Client home page.
9. Refer to instructions for updating datasets. There is a good possibility incremental updates have been made to the dataset since it was posted for download.
10. There is no bulk installation utility to install multiple datasets, so if you need to install more than one dataset, repeat the dataset installation process described above.
11. Refer to Uninstalling Datasets for instructions on uninstalling datasets.

Uninstalling Datasets

To uninstall a dataset, follow these steps.

1. Go to the Configuration page.
2. Click on the Uninstall button next to the dataset you want to uninstall.
3. Click the Yes button in the confirmation pop-up message that appears.
4. The application will uninstall the dataset and refresh the list of installed items on the Configuration page.

NOTE: If you uninstall all datasets, you will get a message that the application cannot be used until at least one dataset is installed.

Troubleshooting Client Issues

Troubleshooting Client Issues

This section includes tips for resolving common issues users encounter while using the ONeSOURCE Client. For issues with content such as missing or incorrect data, users should use the feedback icons located throughout the Client screens as well as the Support tab across the top of the browser.

Clearing Browser Cache

To fix display issues or to see changes made to the content following a specific fix, clearing the cache of the selected browser can often resolve things without having to submit a feedback to the support team.

Following are instructions for clearing cache for three different browsers: Google Chrome, Microsoft Edge, and Internet Explorer

Google Chrome

1. Click on the three dots in the upper right of the browser and select **Settings**.

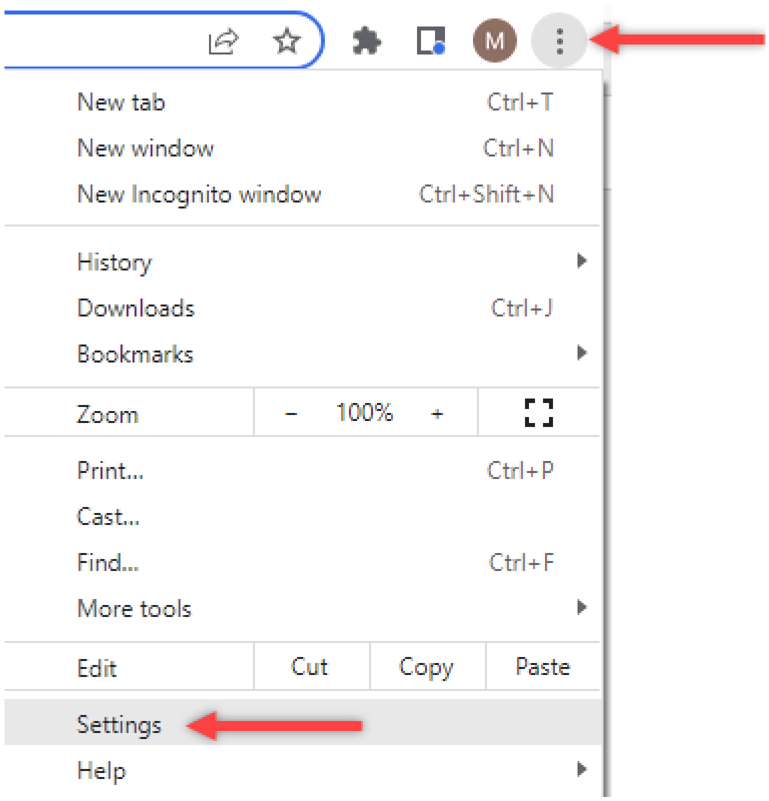


Figure 18-1. Settings

2. From the settings page, click on **Clear browsing data**.

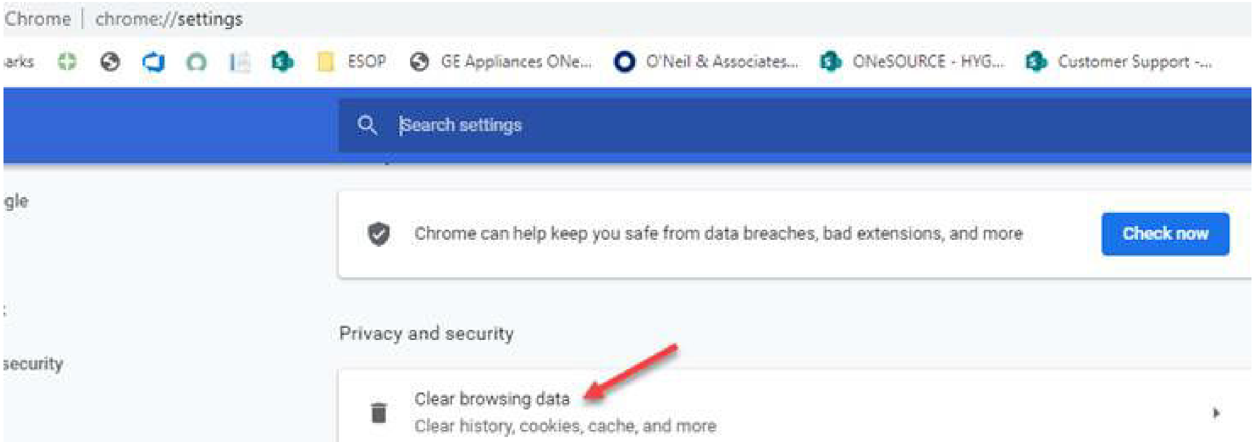


Figure 18-2. Clear Browsing Data

3. A pop-up window will open where you can check what items you want to clear. After checking the desired boxes, click **Clear data**.

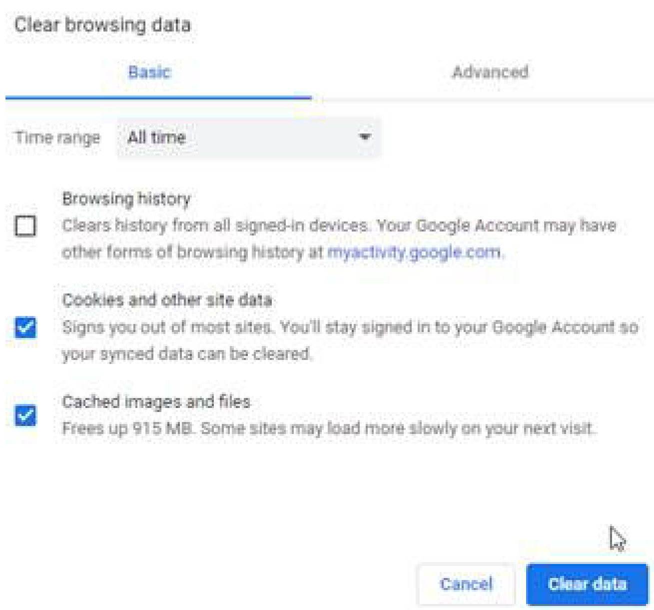


Figure 18-3. Clear Data

Microsoft Edge

1. Click on the three dots in the upper right of the browser and select **Settings**.

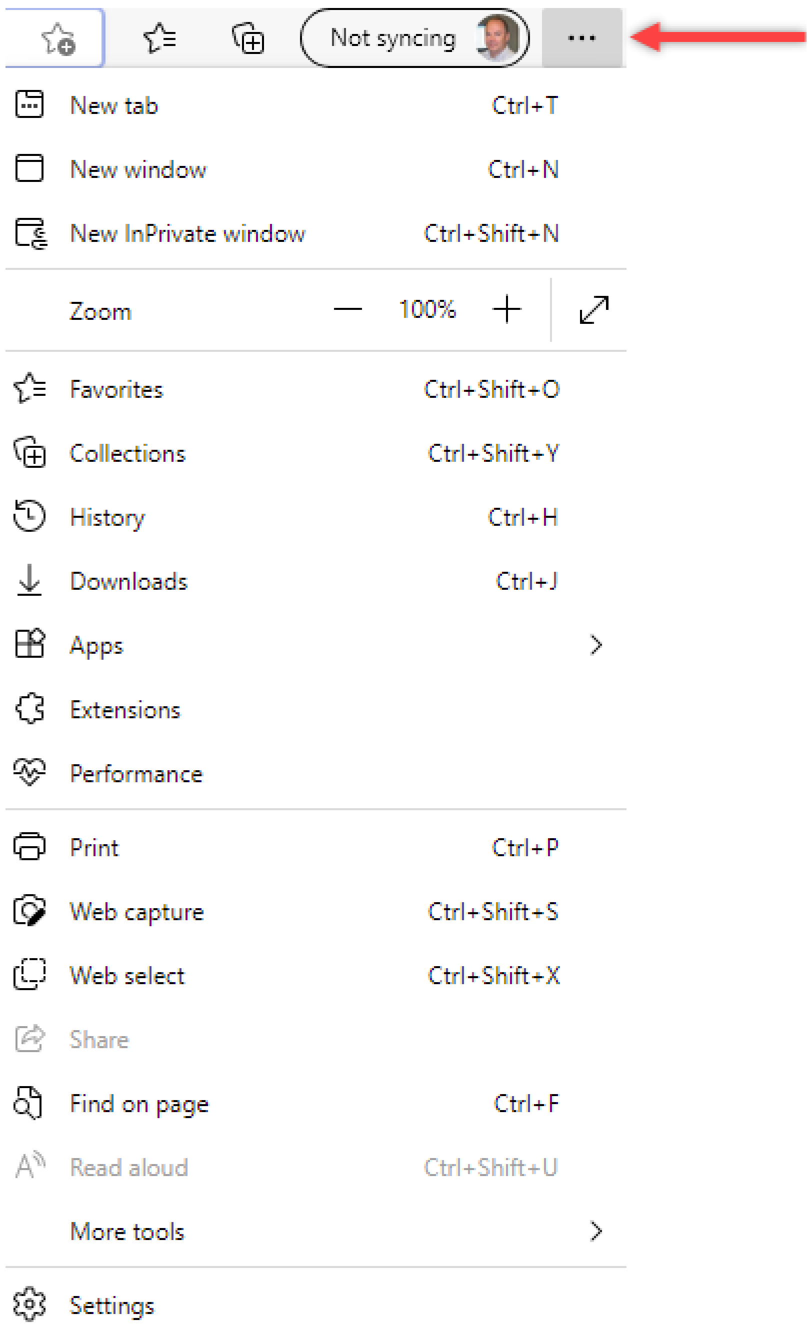


Figure 18-4. Settings

2. From the settings page, select **Privacy, search, and services**.

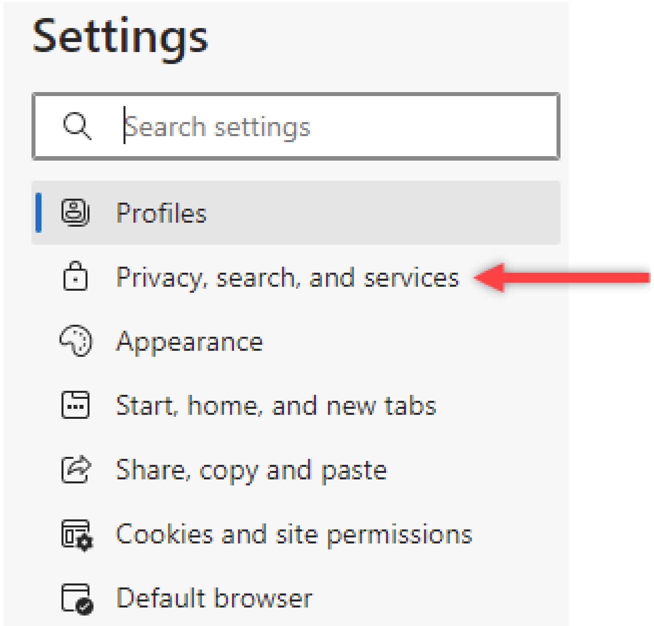


Figure 18-5. Privacy, Search, and Services

3. In the Clear browsing data section of the screen, click on **Choose what to clear**.

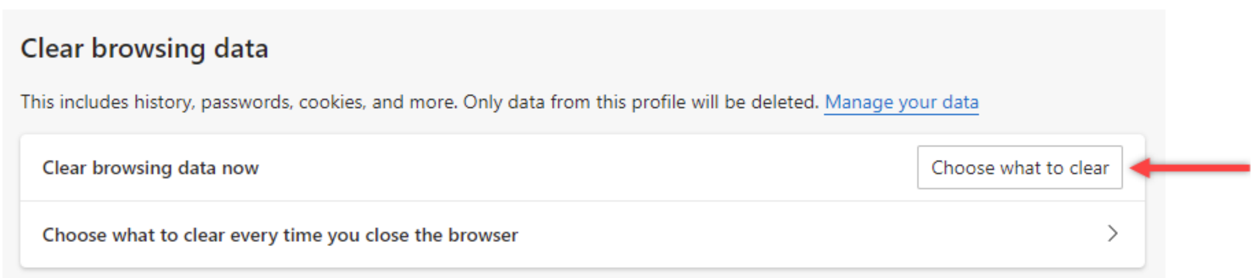


Figure 18-6. Select What to Clear

4. Check the desired boxes and then click **Clear now**.

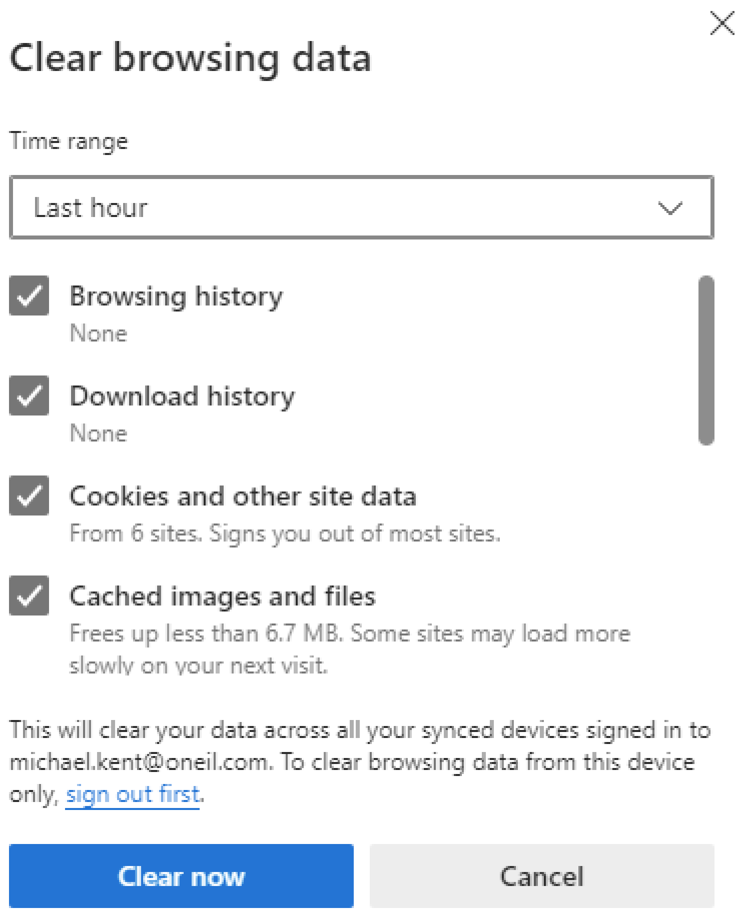


Figure 18-7. Clear Now Button

Microsoft Internet Explorer

NOTE: Microsoft stopped supporting Internet Explorer on August 17, 2021. Users are encouraged to switch to Google Chrome or Microsoft Edge if they are currently using Internet Explorer.

1. Click the icon that looks like a gear in the upper right of the browser.

Figure 18-8. Gear Icon

2. Select **Internet options**.

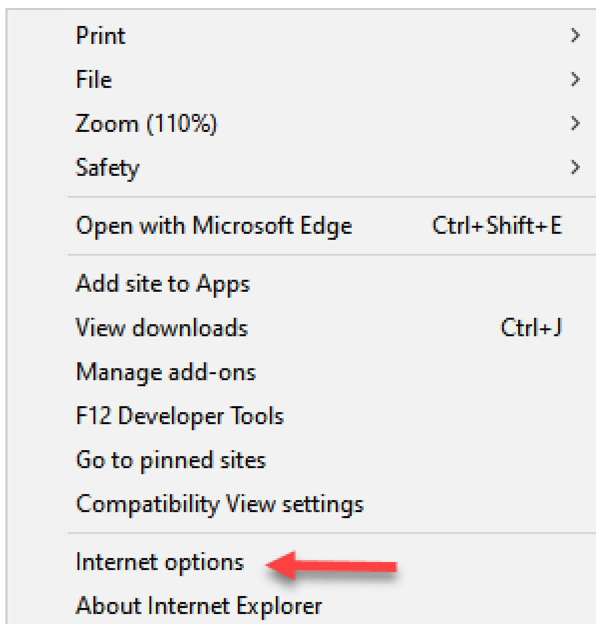


Figure 18-9. Internet Options

3. Under Browsing history, click the **Delete** button.

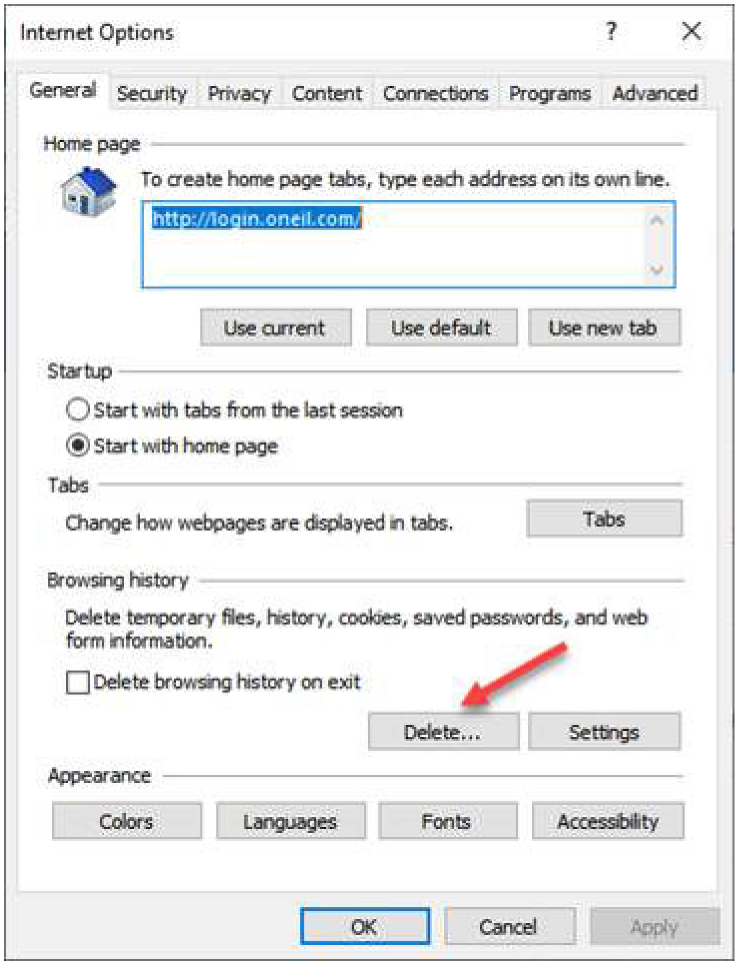


Figure 18-10. Delete Browsing History

4. Check the boxes of the items you want to delete and then click the **Delete** button.

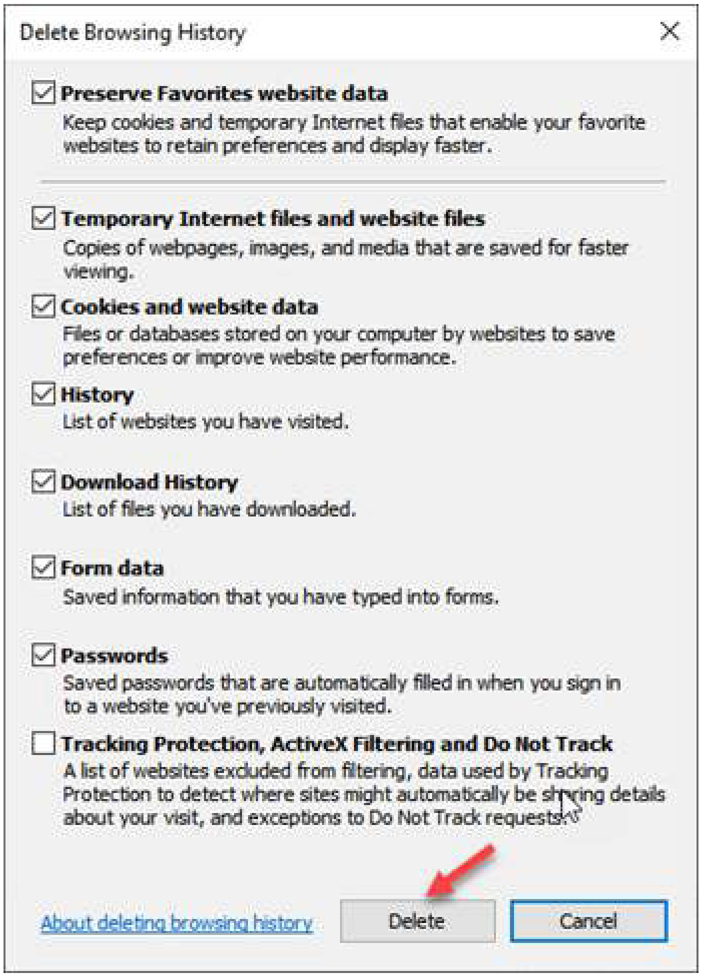


Figure 18-11. Select What to Delete

Sending Client Logs

Logs are created automatically by the application and stored in a folder on the local machine each time a session of the ONeSOURCE Client is initiated. The logs can be very useful to the support team in determining the cause of an issue when other means have not been successful. For issues that cannot be resolved quickly, ONEIL support will ask users to send the log files.

1. From the user's machine, navigate to the logs folder by right-clicking on the ONeSOURCE Client desktop icon and select "Open file location".

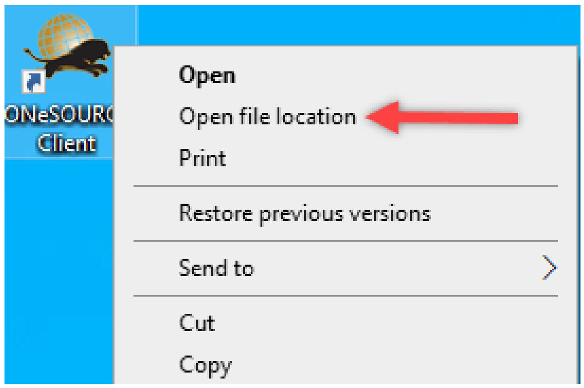


Figure 18-12. Open File Location

2. Open on the logs folder.

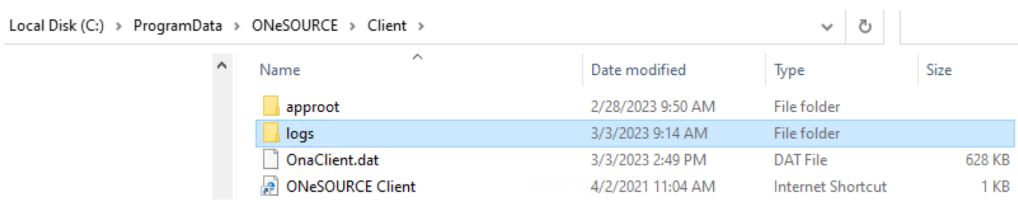


Figure 18-13. Select Logs Folder

3. The list of log files will display.

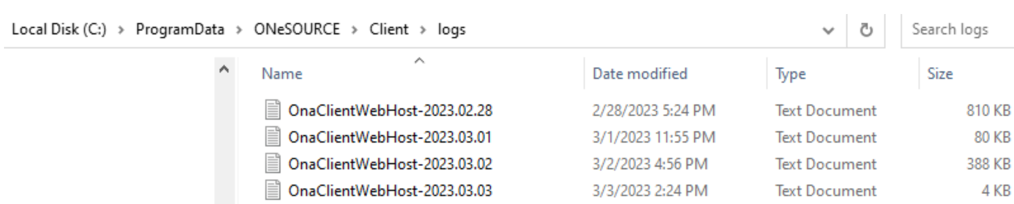


Figure 18-14. List of Log Files

4. At a minimum, copy the log file for the date the issue occurred. Sending a copy of a log file when the application was working properly is good for comparison purposes.
5. Paste the log file(s) into a new e-mail as attachments.

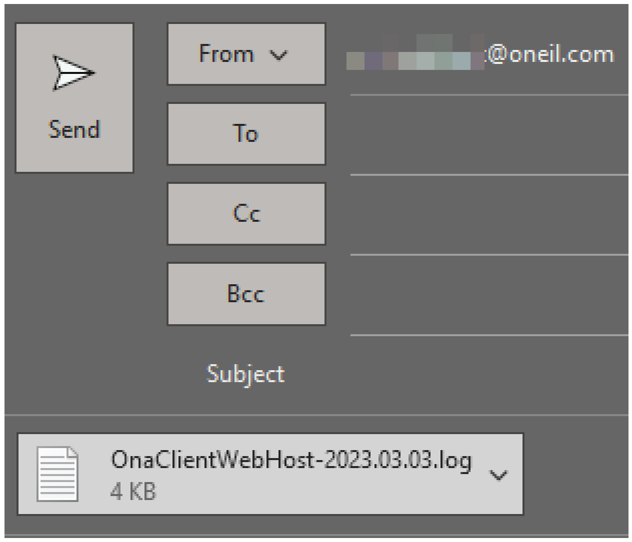


Figure 18-15. Blank E-Mail

6. Send the e-mail to the address of the ONEIL support team.

Alternate Method for Accessing the Log Files

7. Open a File Explorer window by right-clicking on the File Explorer icon in the task bar selecting File Explorer.

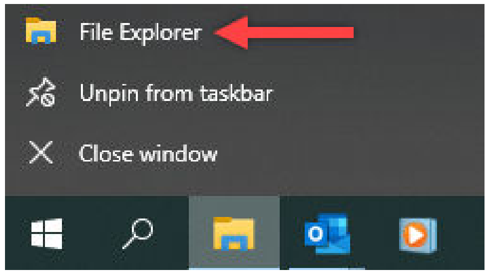


Figure 18-16. File Explorer

8. When the File Explorer window opens, paste the following path to the logs in the search window: C:\ProgramData\ONeSOURCE\Client.

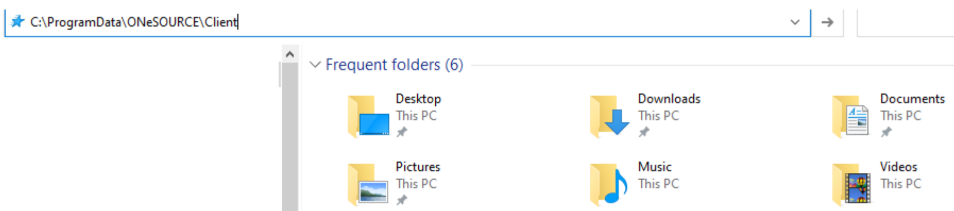


Figure 18-17. File Explorer Window

NOTE: The ProgramData folder is typically a hidden folder and cannot be accessed directly by clicking on the C: drive. The path must be pasted in as shown in the above screenshot.

9. Press Enter and double-click the logs folder to display the logs.
10. Follow steps 4 and 5 under Sending Client Logs to copy the log files and send them to ONEIL Support.

Administration - Announcements

Managing Announcements

Managing announcements is done under the Administration section in the web version of the ONeSOURCE Client. Here the administrator can create, edit, and remove announcements, assign a display priority, require an acknowledgement, and specify start and expiration dates.

Refer to Viewing Announcements under the **Announcements and Alerts** section for more information.

Creating an Announcement

To create a new announcement:

1. Click the Adminstration tab.

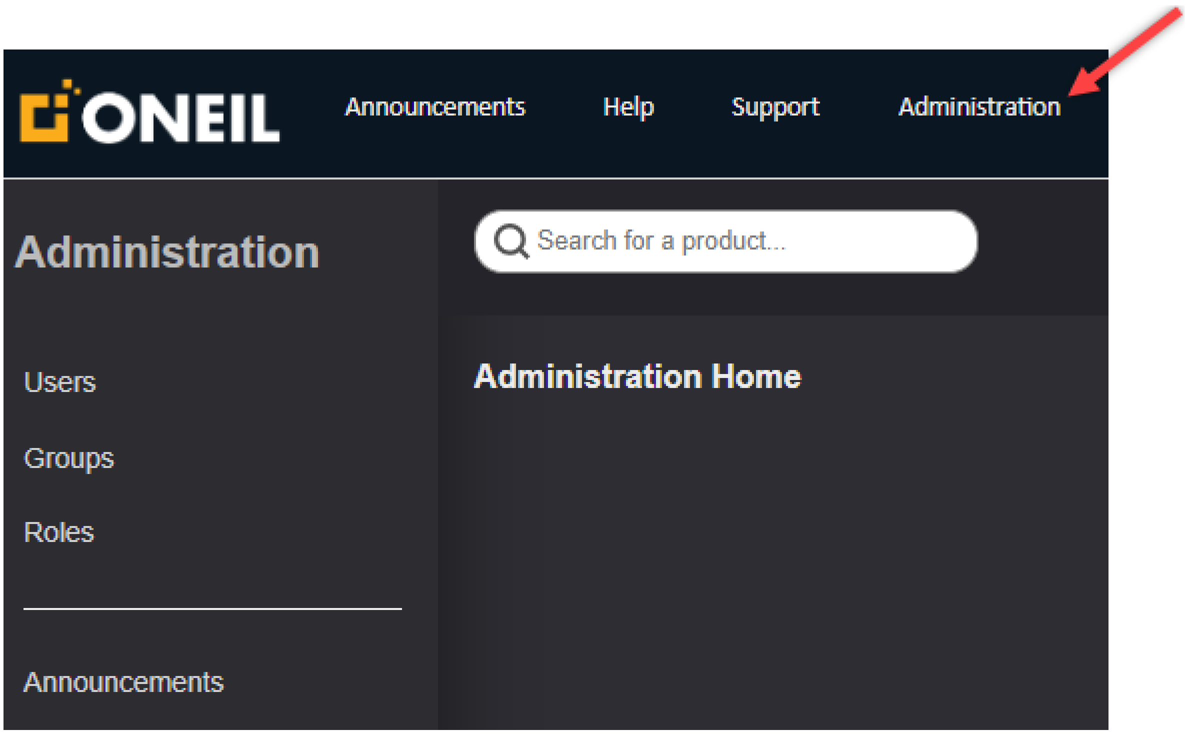


Figure 19-1. Administration Tab

2. Click Announcements on the left.

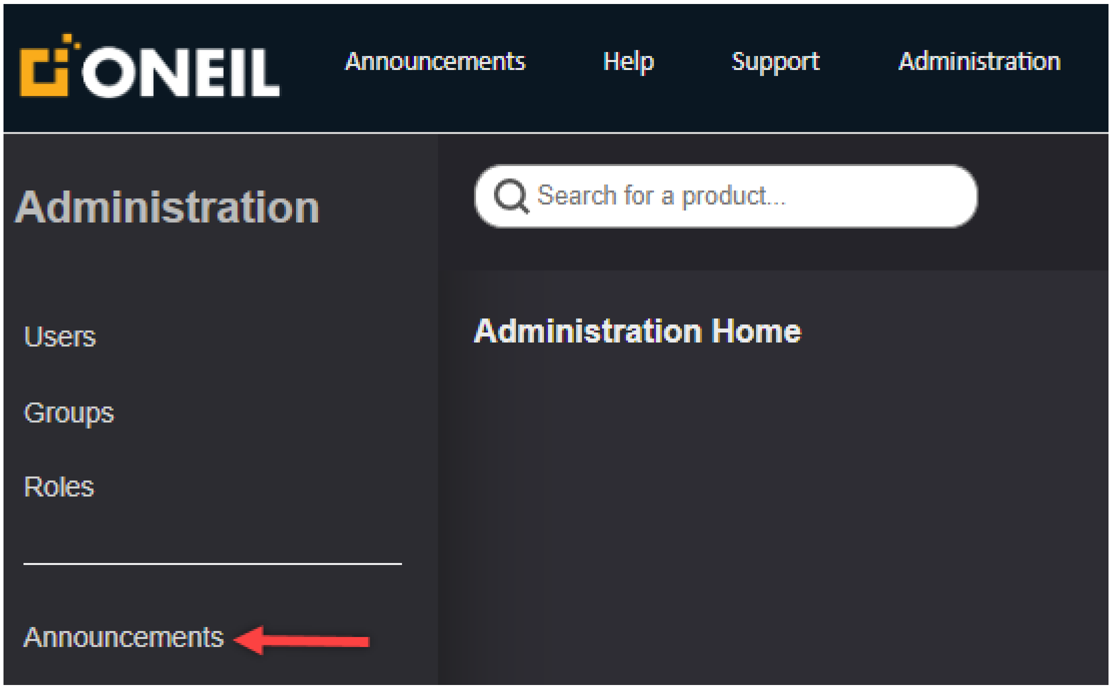


Figure 19-2. Announcements

3. The Announcements page will open.

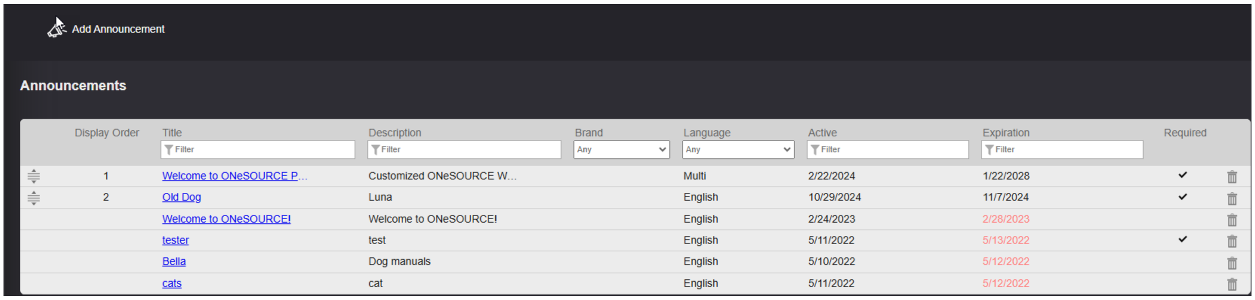


Figure 19-3. Announcements Page

4. Select the Add Announcement button.
5. The Add/Edit Announcements page will open.

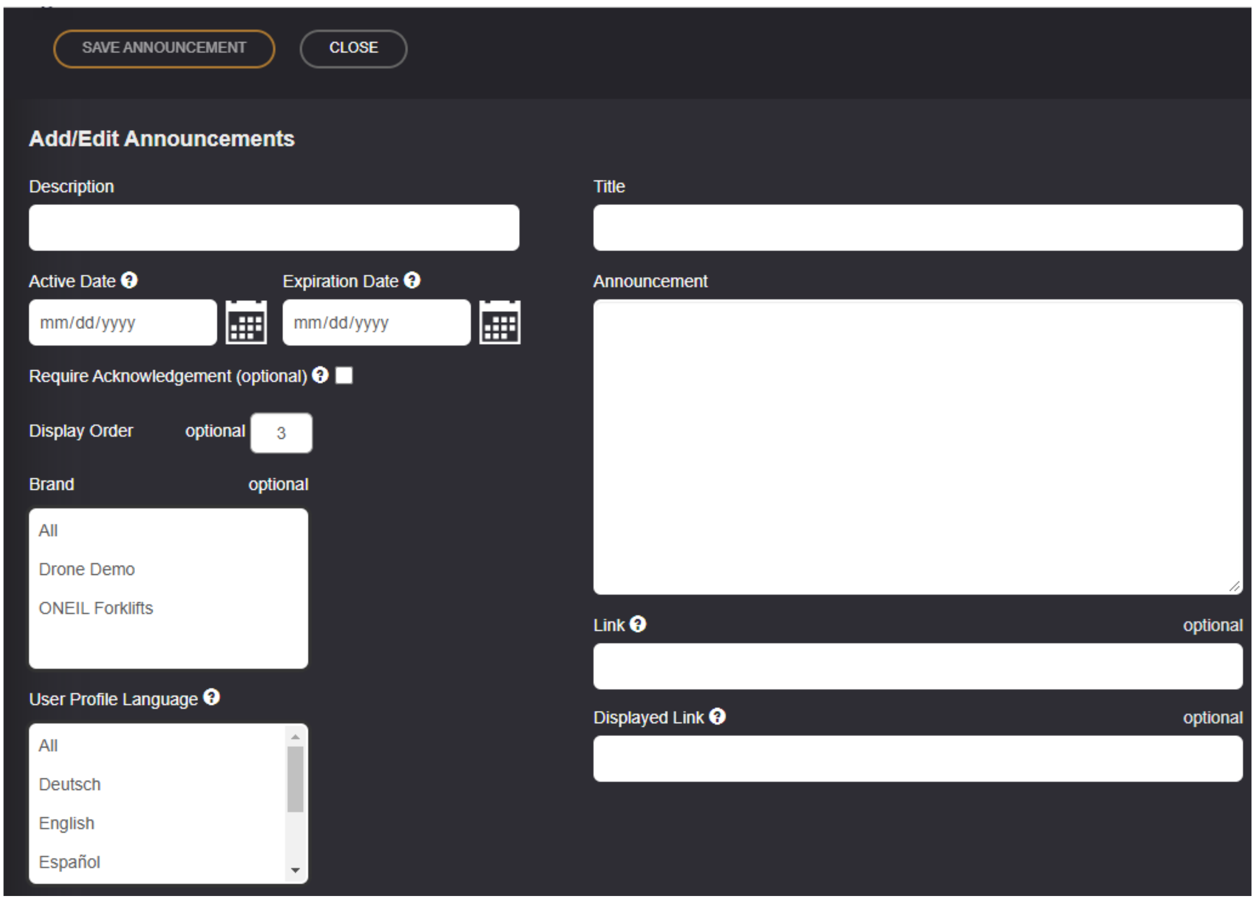


Figure 19-4. Add/Edit Announcements Page

6. Enter a description in the Description field (optional).
7. Enter a title for the announcement (optional).

8. Enter dates to turn the announcement on and off in the Active Date and Expiration Date fields respectively. The active date is the date on which the announcement will display to users. The expiration date is the date the announcement will no longer be displayed. Refer to Setting Start and Expiration Dates for Announcements for more details.
9. Check the box beside Require Acknowledgement if you want the announcement to display as soon as users open the Client. If this box is checked, users will have to acknowledge the announcement before they can close it.
   Following is an example of how an announcement will appear to users that require an acknowledgement.

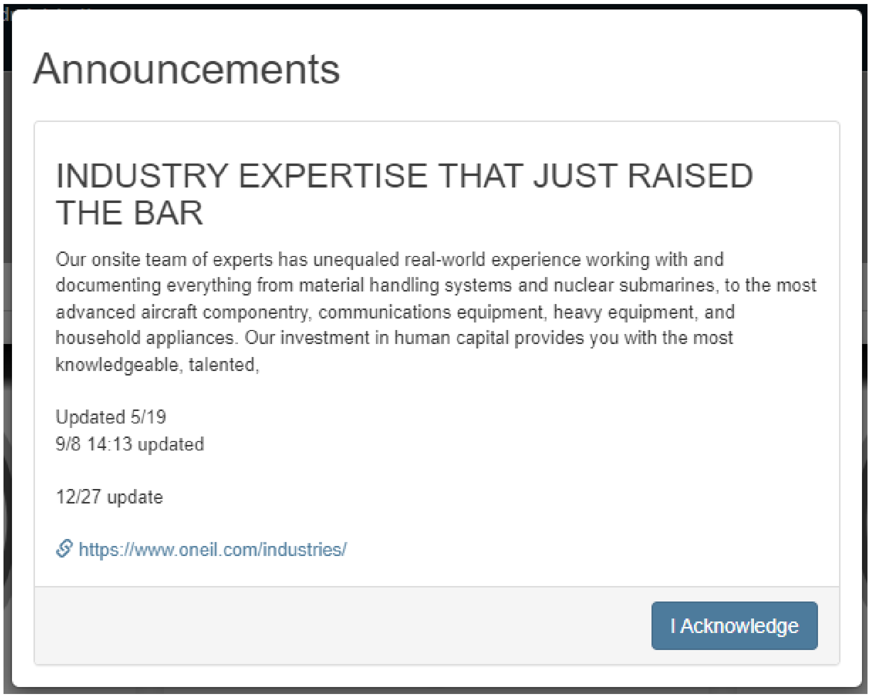


Figure 19-5. Acknowledge Announcement

NOTE: Users must click the I Acknowledge button to close the announcement, but it will still be available under the Announcements tab in the Client.

10. Select a brand using the drop-down list (optional).

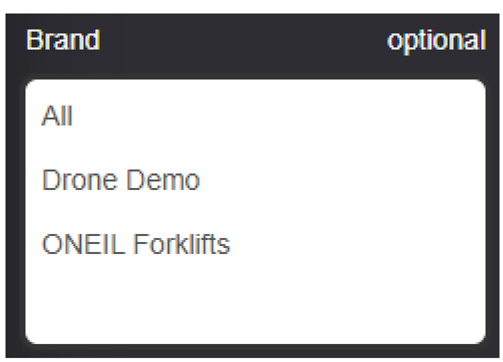


Figure 19-6. Select Brand

11. Choose a region from the list (optional).

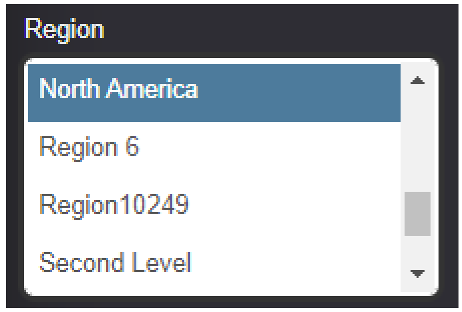


Figure 19-7. Select Region

12. Select the display language for the announcement using the drop-down list (the default is English).

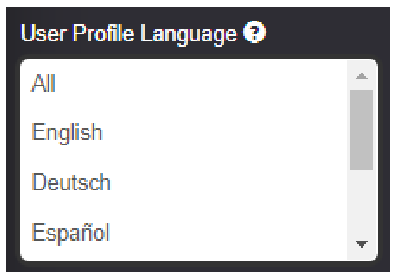


Figure 19-8. Select Language

NOTE:

a. Users will view the announcement in the language it was authored in during its creation. The announcement is not translated from its original language, even if multiple languages are selected here.

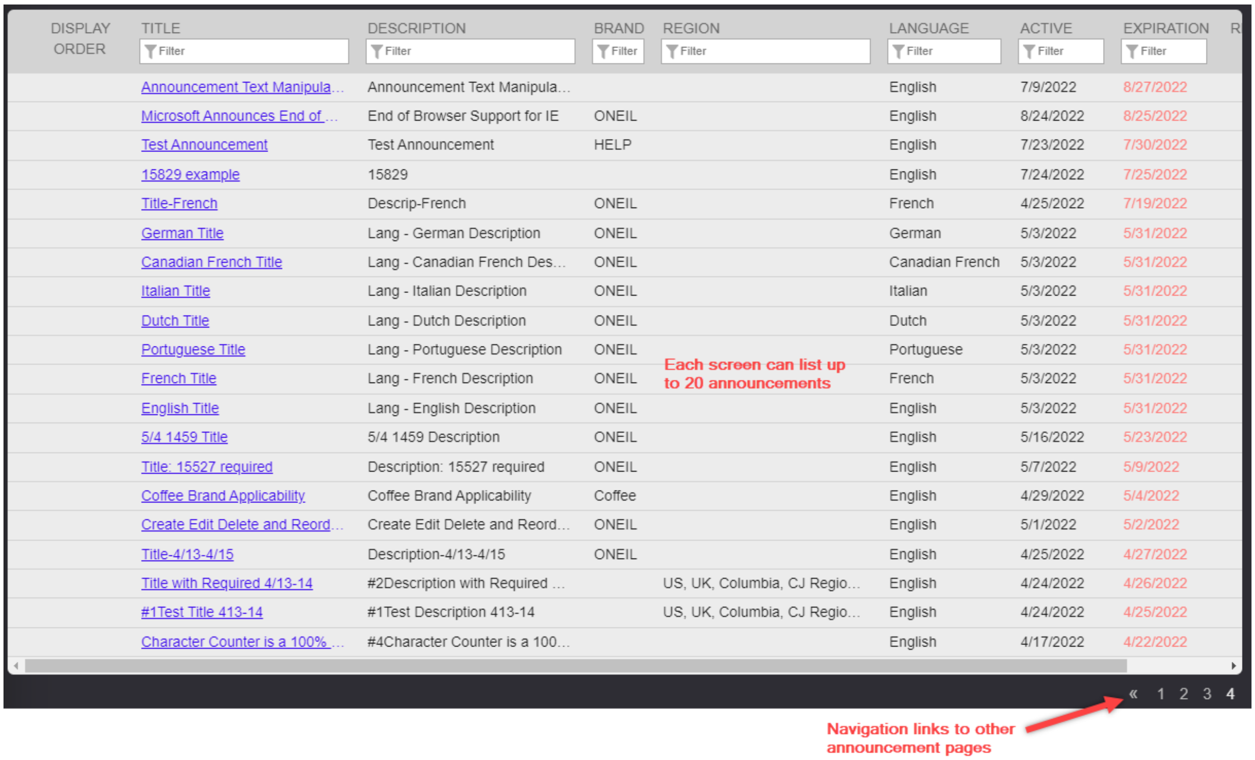
b. To select more than one language but not all languages, use the Control key+Left mouse button to select each language.

c. To select all languages, click All.

d. You can create an announcement for just one day by selecting the same date for Active Date and Expiration Date.

13. Enter the text for the announcement in the Announcement text box. You can expand the size of the text box while typing by clicking on the lower right corner of the text box. Note that the announcement text window accepts common HTML tags to allow for bolding, underlining, increasing font size, etc.
14. Enter a URL in the Link field (optional).
15. Enter the text you would like the link to display to users viewing the announcement in the Displayed Link field (optional).
16. Click on the Save button when finished to save and release the announcement.
17. Refer to Viewing Announcements under the **Announcements and Alerts** section for instructions on viewing the announcement.

18. The newly created announcement will appear at the bottom of the list where it can be edited later if needed.
19. A maximum of 20 announcements can be displayed on screen at a time. If there are more than 20 announcements total, users can go to other screens using the number links at the bottom.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION
	Announcement Text Manipula...	Announcement Text Manipula...			English	7/9/2022	8/27/2022
	Microsoft Announces End of ...	End of Browser Support for IE	ONEIL		English	8/24/2022	8/25/2022
	Test Announcement	Test Announcement	HELP		English	7/23/2022	7/30/2022
	15829 example	15829			English	7/24/2022	7/25/2022
	Title-French	Descrip-French	ONEIL		French	4/25/2022	7/19/2022
	German Title	Lang - German Description	ONEIL		German	5/3/2022	5/31/2022
	Canadian French Title	Lang - Canadian French Des...	ONEIL		Canadian French	5/3/2022	5/31/2022
	Italian Title	Lang - Italian Description	ONEIL		Italian	5/3/2022	5/31/2022
	Dutch Title	Lang - Dutch Description	ONEIL		Dutch	5/3/2022	5/31/2022
	Portuguese Title	Lang - Portuguese Description	ONEIL		Portuguese	5/3/2022	5/31/2022
	French Title	Lang - French Description	ONEIL		French	5/3/2022	5/31/2022
	English Title	Lang - English Description	ONEIL		English	5/3/2022	5/31/2022
	5/4 1459 Title	5/4 1459 Description	ONEIL		English	5/16/2022	5/23/2022
	Title: 15527 required	Description: 15527 required	ONEIL		English	5/7/2022	5/9/2022
	Coffee Brand Applicability	Coffee Brand Applicability	Coffee		English	4/29/2022	5/4/2022
	Create Edit Delete and Reord...	Create Edit Delete and Reord...	ONEIL		English	5/1/2022	5/2/2022
	Title-4/13-4/15	Description-4/13-4/15	ONEIL		English	4/25/2022	4/27/2022
	Title with Required 4/13-14	#2Description with Required ...		US, UK, Columbia, CJ Regio...	English	4/24/2022	4/26/2022
	#1Test Title 413-14	#1Test Description 413-14		US, UK, Columbia, CJ Regio...	English	4/24/2022	4/25/2022
	Character Counter is a 100% ...	#4Character Counter is a 100...			English	4/17/2022	4/22/2022

Figure 19-9. List of Announcements

NOTE:

Date format will be updated based on users profile language setting.

Editing an Announcement

To edit an existing announcement.

1. Click on the Administration tab.

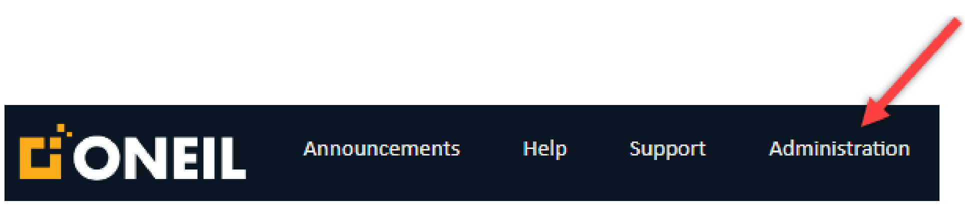


Figure 19-10. Administration Tab

2. Click on Announcements on the left.

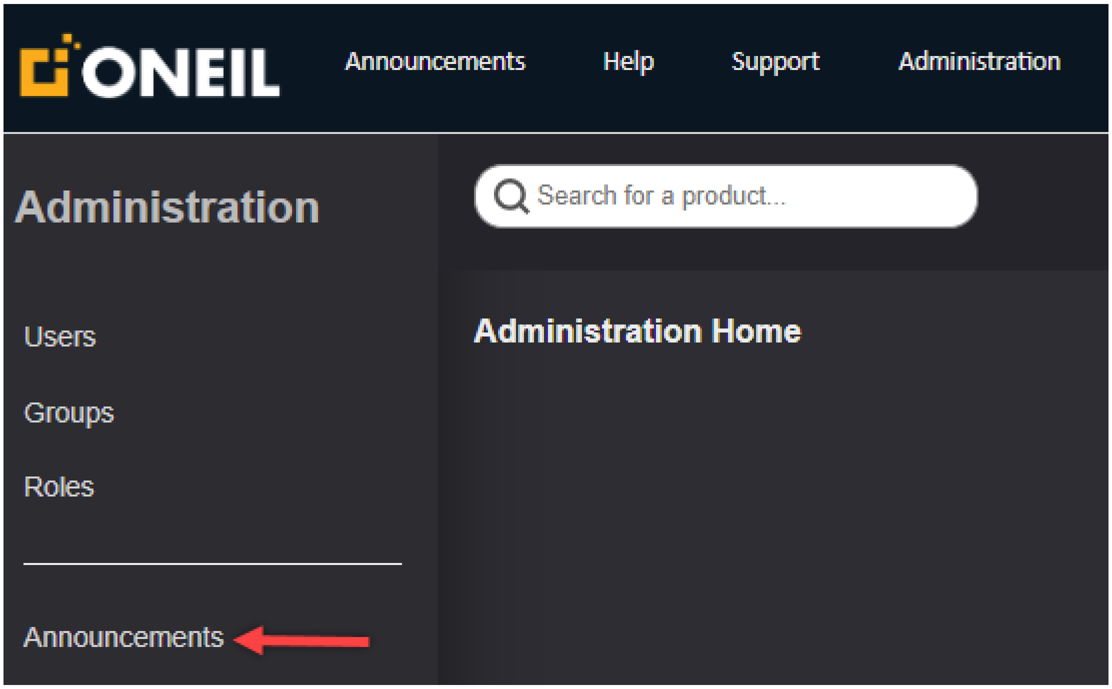
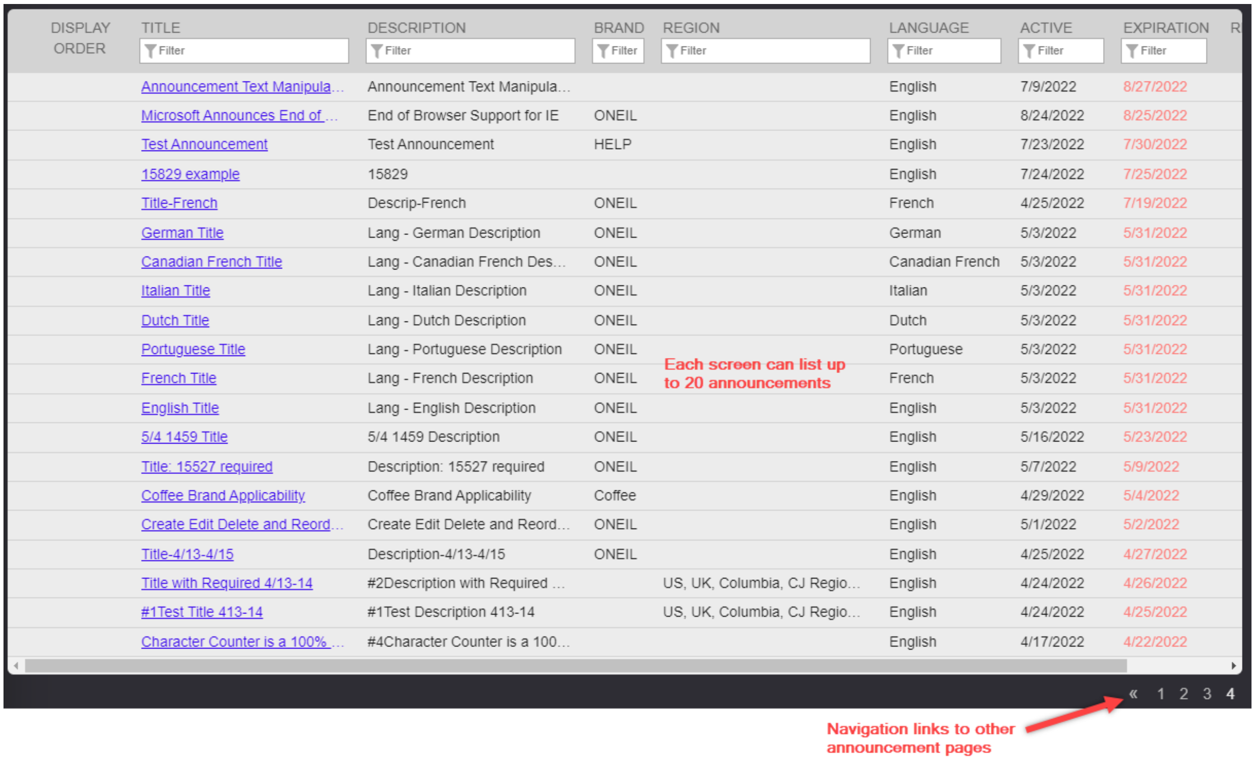


Figure 19-11. Announcements

3. Existing announcements will be listed on Announcements page. Locate the announcement you wish to edit. You may need to navigate to another screen if there are more than a total of 20 announcements, the number that can be listed on one screen. Click on the announcement's title to open it in the editor.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION
	Announcement Text Manipula…	Announcement Text Manipula…			English	7/9/2022	8/27/2022
	Microsoft Announces End of …	End of Browser Support for IE	ONEIL		English	8/24/2022	8/25/2022
	Test Announcement	Test Announcement	HELP		English	7/23/2022	7/30/2022
	15829 example	15829			English	7/24/2022	7/25/2022
	Title-French	Descrip-French	ONEIL		French	4/25/2022	7/19/2022
	German Title	Lang - German Description	ONEIL		German	5/3/2022	5/31/2022
	Canadian French Title	Lang - Canadian French Des…	ONEIL		Canadian French	5/3/2022	5/31/2022
	Italian Title	Lang - Italian Description	ONEIL		Italian	5/3/2022	5/31/2022
	Dutch Title	Lang - Dutch Description	ONEIL		Dutch	5/3/2022	5/31/2022
	Portuguese Title	Lang - Portuguese Description	ONEIL		Portuguese	5/3/2022	5/31/2022
	French Title	Lang - French Description	ONEIL		French	5/3/2022	5/31/2022
	English Title	Lang - English Description	ONEIL		English	5/3/2022	5/31/2022
	5/4 1459 Title	5/4 1459 Description	ONEIL		English	5/16/2022	5/23/2022
	Title: 15527 required	Description: 15527 required	ONEIL		English	5/7/2022	5/9/2022
	Coffee Brand Applicability	Coffee Brand Applicability	Coffee		English	4/29/2022	5/4/2022
	Create Edit Delete and Reord…	Create Edit Delete and Reord…	ONEIL		English	5/1/2022	5/2/2022
	Title-4/13-4/15	Description-4/13-4/15	ONEIL		English	4/25/2022	4/27/2022
	Title with Required 4/13-14	#2Description with Required …		US, UK, Columbia, CJ Regio…	English	4/24/2022	4/26/2022
	#1Test Title 413-14	#1Test Description 413-14		US, UK, Columbia, CJ Regio…	English	4/24/2022	4/25/2022
	Character Counter is a 100% …	#4Character Counter is a 100…			English	4/17/2022	4/22/2022

Figure 19-12. List of Announcements

4. Edit the announcement fields as needed, then click the Save Announcement button.

Figure 19-13. Save Announcement Button

5. Refer to Viewing Announcements for instructions on viewing your edits.

Deleting an Announcement

To Delete an Announcement

1. Click on the Administration tab.

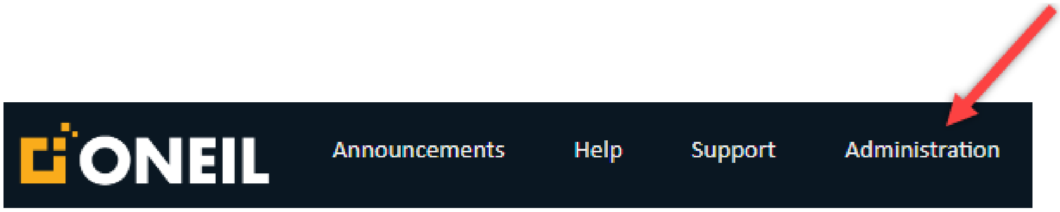


Figure 19-14. Administration Tab

2. Click on Announcements on the left.

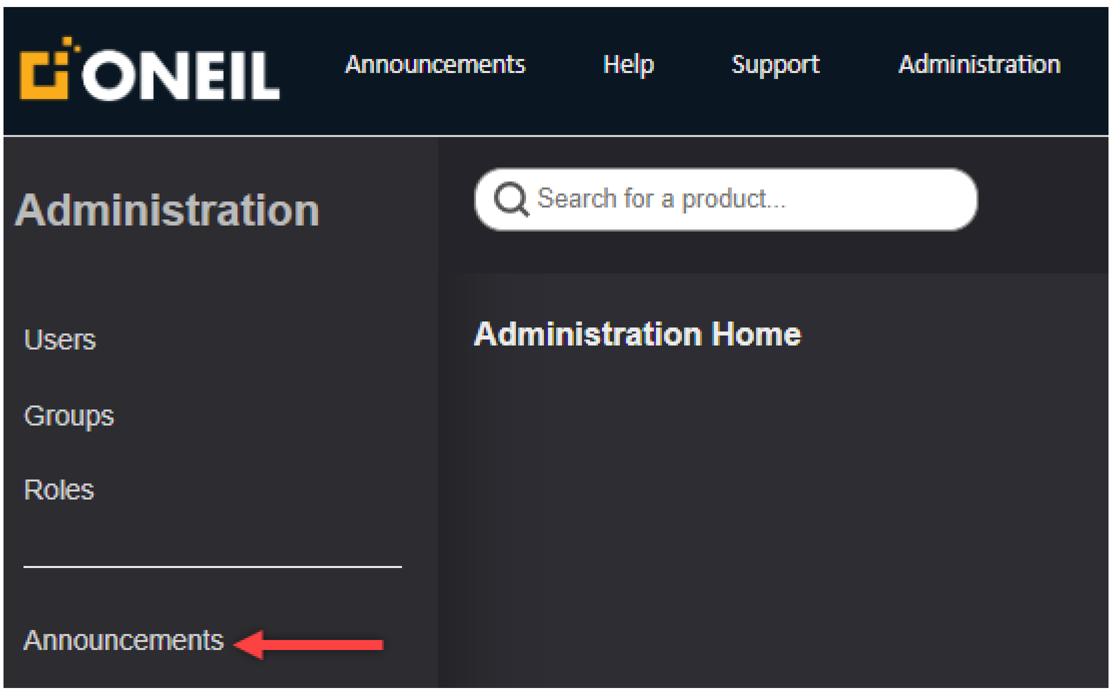
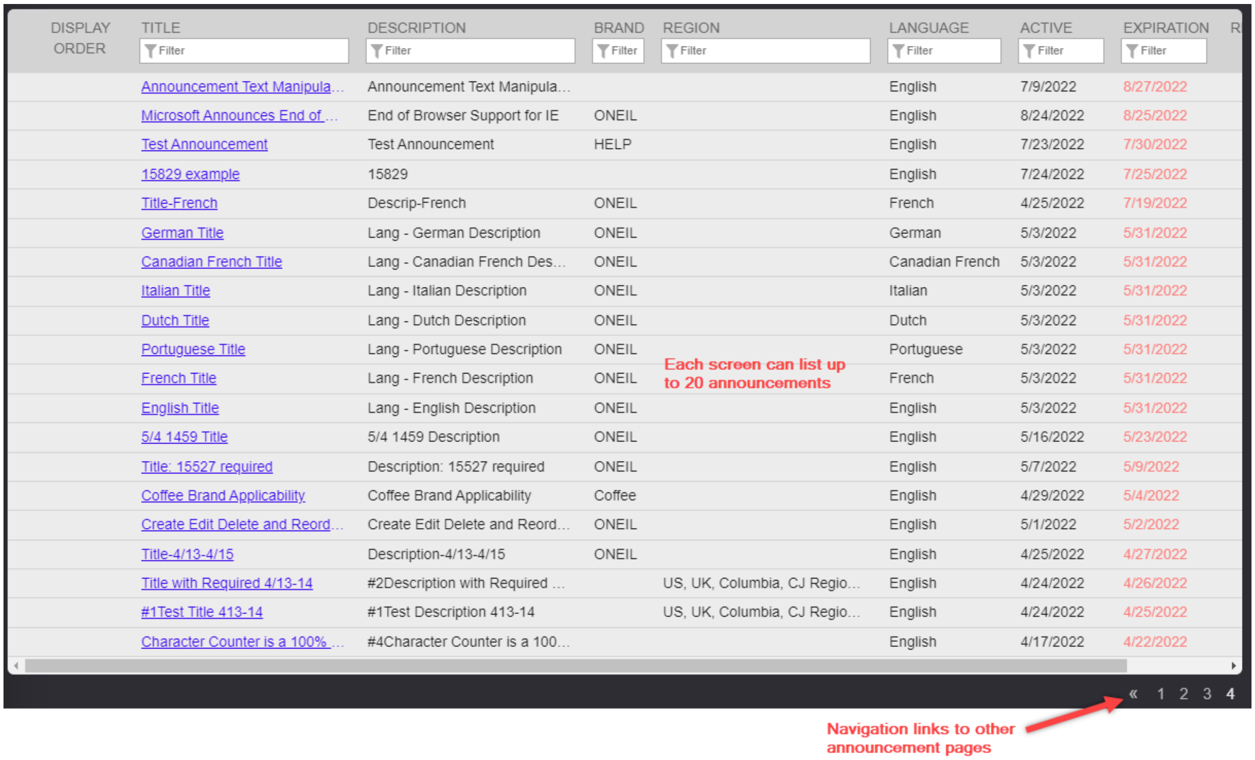


Figure 19-15. Announcements

3. The Announcements page will open.
4. The list of existing announcements will be displayed. Locate the announcement you wish to delete. You may need to navigate to another page if there are more than 20 announcements.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION
	Announcement Text Manipula...	Announcement Text Manipula...			English	7/9/2022	8/27/2022
	Microsoft Announces End of ...	End of Browser Support for IE	ONEIL		English	8/24/2022	8/25/2022
	Test Announcement	Test Announcement	HELP		English	7/23/2022	7/30/2022
	15829 example	15829			English	7/24/2022	7/25/2022
	Title-French	Descrip-French	ONEIL		French	4/25/2022	7/19/2022
	German Title	Lang - German Description	ONEIL		German	5/3/2022	5/31/2022
	Canadian French Title	Lang - Canadian French Des...	ONEIL		Canadian French	5/3/2022	5/31/2022
	Italian Title	Lang - Italian Description	ONEIL		Italian	5/3/2022	5/31/2022
	Dutch Title	Lang - Dutch Description	ONEIL		Dutch	5/3/2022	5/31/2022
	Portuguese Title	Lang - Portuguese Description	ONEIL		Portuguese	5/3/2022	5/31/2022
	French Title	Lang - French Description	ONEIL		French	5/3/2022	5/31/2022
	English Title	Lang - English Description	ONEIL		English	5/3/2022	5/31/2022
	5/4 1459 Title	5/4 1459 Description	ONEIL		English	5/16/2022	5/23/2022
	Title: 15527 required	Description: 15527 required	ONEIL		English	5/7/2022	5/9/2022
	Coffee Brand Applicability	Coffee Brand Applicability	Coffee		English	4/29/2022	5/4/2022
	Create Edit Delete and Reord...	Create Edit Delete and Reord...	ONEIL		English	5/1/2022	5/2/2022
	Title-4/13-4/15	Description-4/13-4/15	ONEIL		English	4/25/2022	4/27/2022
	Title with Required 4/13-14	#2Description with Required ...		US, UK, Columbia, CJ Regio...	English	4/24/2022	4/26/2022
	#1Test Title 413-14	#1Test Description 413-14		US, UK, Columbia, CJ Regio...	English	4/24/2022	4/25/2022
	Character Counter is a 100% ...	#4Character Counter is a 100...			English	4/17/2022	4/22/2022

Figure 19-16. List of Announcements

5. To delete the announcement, click the trash can icon at the far right of the announcement's row.

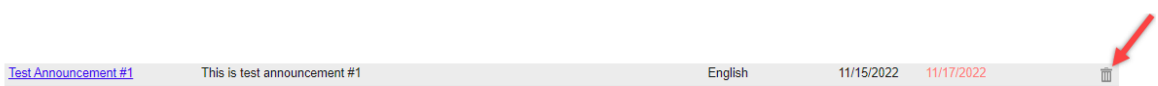


Figure 19-17. Deleting an Announcement

6. If you already have the announcement open in the Add/Edit Announcements page, you can also click the **Remove** button to delete it.

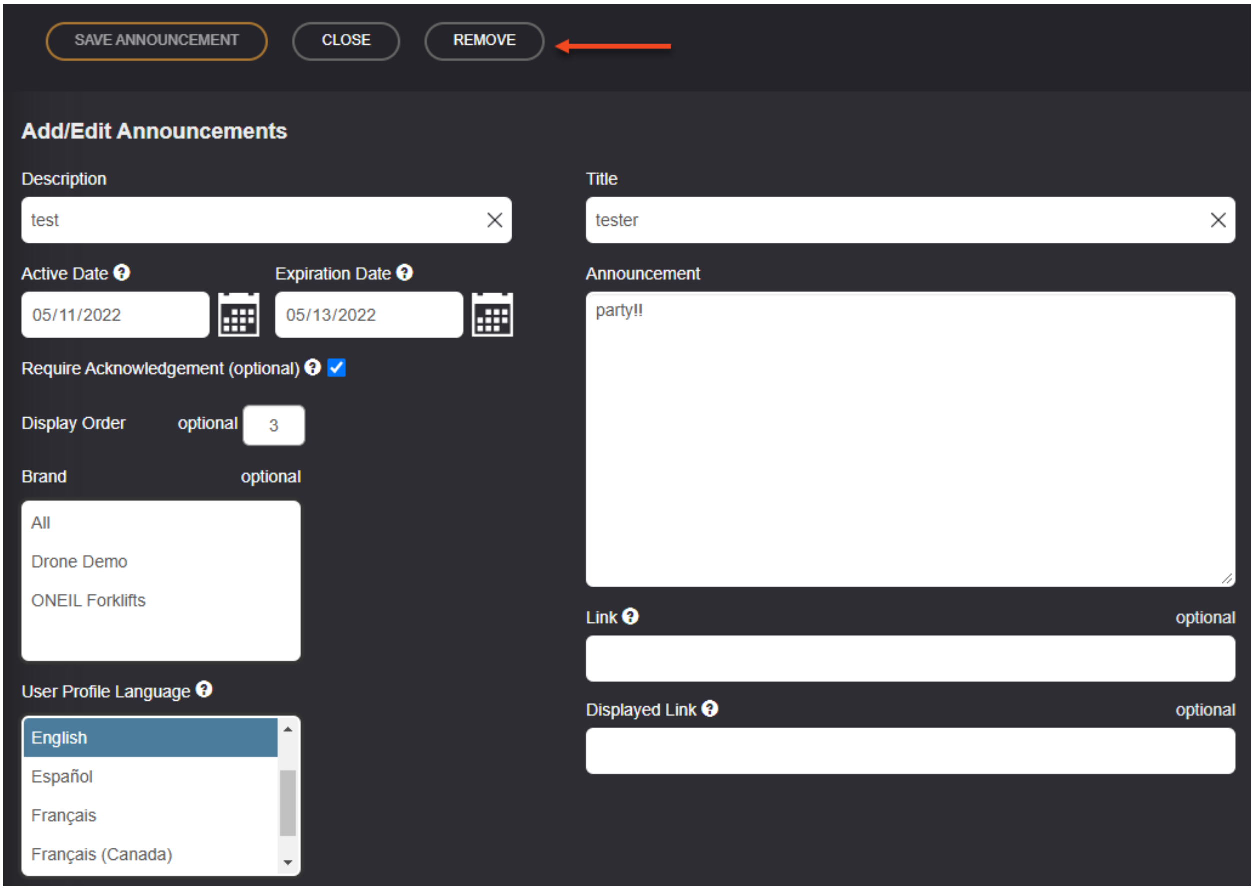


Figure 19-18. Using the Remove Button to Delete an Announcement

7. After clicking the trash can icon or the Remove button, a confirmation pop-up message will display.

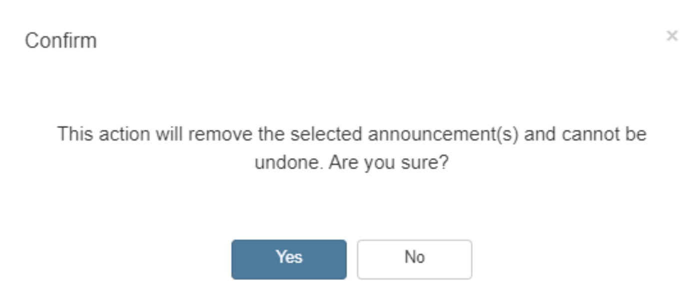


Figure 19-19. Confirmation Pop-Up Message

8. Click the **Yes** button to confirm the deletion.

NOTE: As shown in the pop-up message, once the announcement is deleted it cannot be undone.

Assigning Priority to an Announcement

Announcements are given a display order to dictate the order in which they will display in the ONeSOURCE Client when acknowledgement is required. If an acknowledgement is not required, the announcements will display in the order in which they were created.

To assign priority to an announcement:

1. Click on the Administration tab.

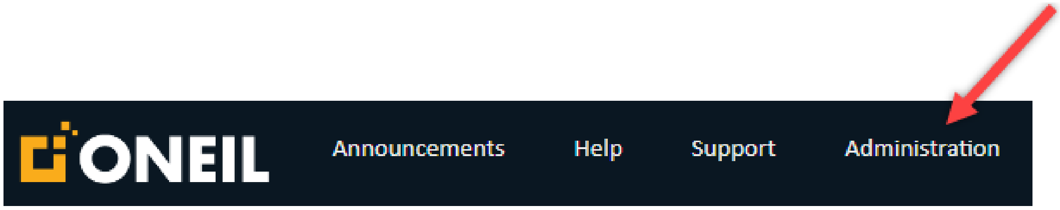


Figure 19-20. Administration Tab

2. Click on Announcements on the left.

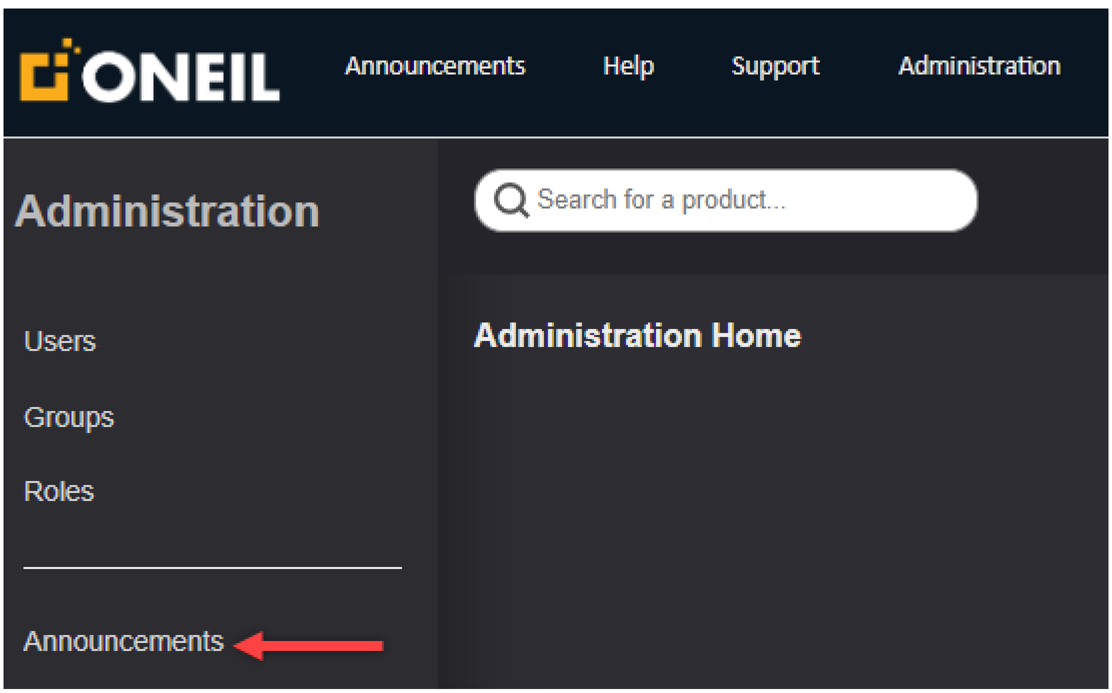
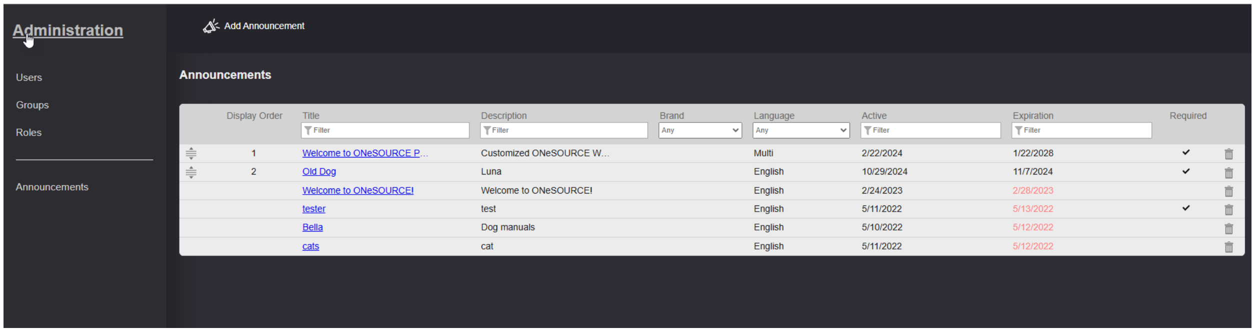


Figure 19-21. Announcements

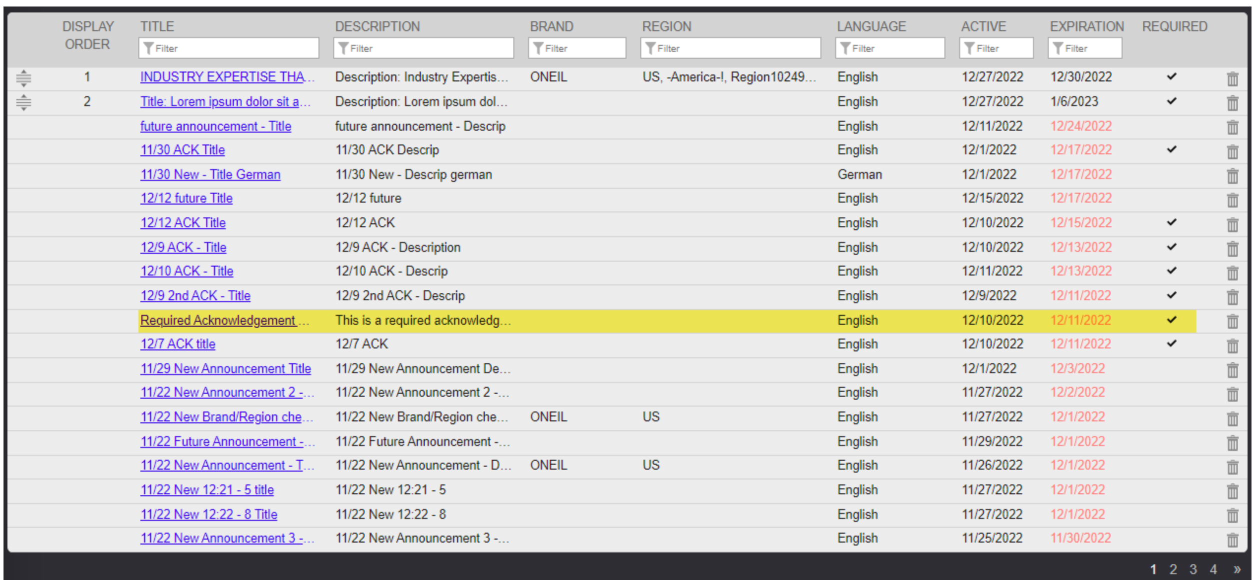
3. The Announcements page will open.



	Display Order	Title	Description	Brand	Language	Active	Expiration	Required	
	1	Welcome to ONeSOURCE P...	Customized ONeSOURCE W...		Multi	2/22/2024	1/22/2028	✓	
	2	Old Dog	Luna		English	10/29/2024	11/7/2024	✓	
		Welcome to ONeSOURCE!	Welcome to ONeSOURCE!		English	2/24/2023	2/28/2023		
		tester	test		English	5/11/2022	5/13/2022	✓	
		Bella	Dog manuals		English	5/10/2022	5/12/2022		
		cats	cat		English	5/11/2022	5/12/2022		

Figure 19-22. Announcements Page

4. To assign a display order to an existing announcement, select it from the list of announcements on the announcements page.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION	REQUIRED
1	INDUSTRY EXPERTISE THA...	Description: Industry Expertis...	ONEIL	US, -America-I, Region10249...	English	12/27/2022	12/30/2022	✓
2	Title: Lorem ipsum dolor sit a...	Description: Lorem ipsum dol...			English	12/27/2022	1/6/2023	✓
	future announcement - Title	future announcement - Descrip			English	12/11/2022	12/24/2022	
	11/30 ACK Title	11/30 ACK Descrip			English	12/1/2022	12/17/2022	✓
	11/30 New - Title German	11/30 New - Descrip german			German	12/1/2022	12/17/2022	
	12/12 future Title	12/12 future			English	12/15/2022	12/17/2022	
	12/12 ACK Title	12/12 ACK			English	12/10/2022	12/15/2022	✓
	12/9 ACK - Title	12/9 ACK - Description			English	12/10/2022	12/13/2022	✓
	12/10 ACK - Title	12/10 ACK - Descrip			English	12/11/2022	12/13/2022	✓
	12/9 2nd ACK - Title	12/9 2nd ACK - Descrip			English	12/9/2022	12/11/2022	✓
	Required Acknowledgement ...	This is a required acknowledg...			English	12/10/2022	12/11/2022	✓
	12/7 ACK title	12/7 ACK			English	12/10/2022	12/11/2022	✓
	11/29 New Announcement Title	11/29 New Announcement De...			English	12/1/2022	12/3/2022	
	11/22 New Announcement 2 -...	11/22 New Announcement 2 -...			English	11/27/2022	12/2/2022	
	11/22 New Brand/Region che...	11/22 New Brand/Region che...	ONEIL	US	English	11/27/2022	12/1/2022	
	11/22 Future Announcement -...	11/22 Future Announcement -...			English	11/29/2022	12/1/2022	
	11/22 New Announcement - T...	11/22 New Announcement - D...	ONEIL	US	English	11/26/2022	12/1/2022	
	11/22 New 12:21 - 5 title	11/22 New 12:21 - 5			English	11/27/2022	12/1/2022	
	11/22 New 12:22 - 8 Title	11/22 New 12:22 - 8			English	11/27/2022	12/1/2022	
	11/22 New Announcement 3 -...	11/22 New Announcement 3 -...			English	11/25/2022	11/30/2022	

Figure 19-23. List of Announcements

NOTE:

a. As a test, select the announcement highlighted above and assign it a display order of 3.

b. Expiration dates for announcements that have already expired will be shown in red.

5. Open the desired announcement.

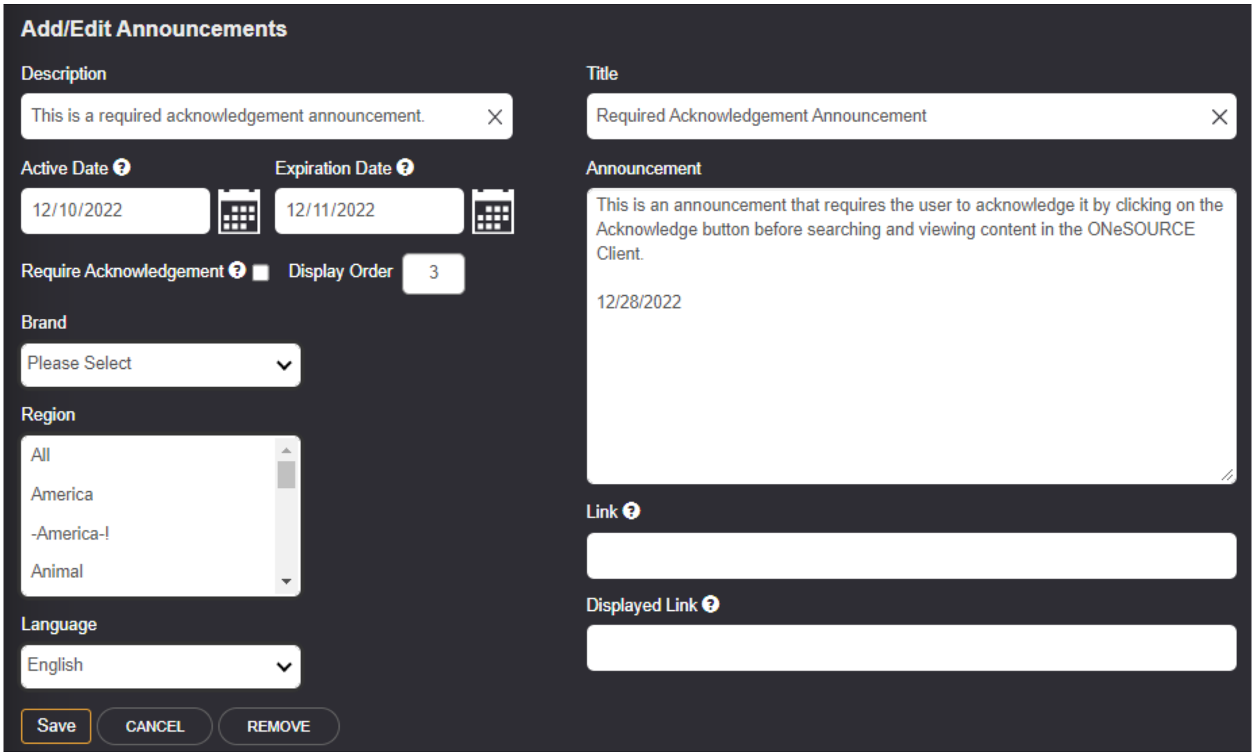


Figure 19-24. Announcement Without an Active Display Order

6. Change an active date to one that is either the current date or in the future, and change the expiration date to one that is in the future.

NOTE: Users can enter the dates directly in the windows for Active Date and Expiration Date, or click on the calendar icon beside each date and select the dates that way.

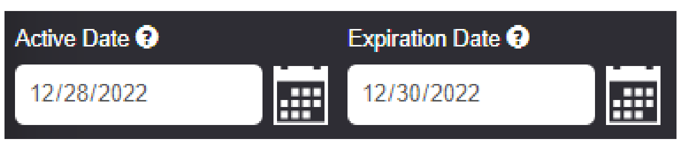


Figure 19-25. Active and Expiration Dates Changed

7. Check the box beside Require Acknowledgement and enter the desired display order.

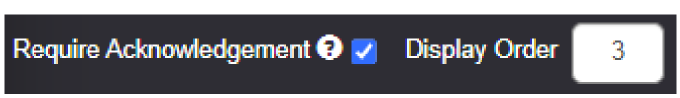
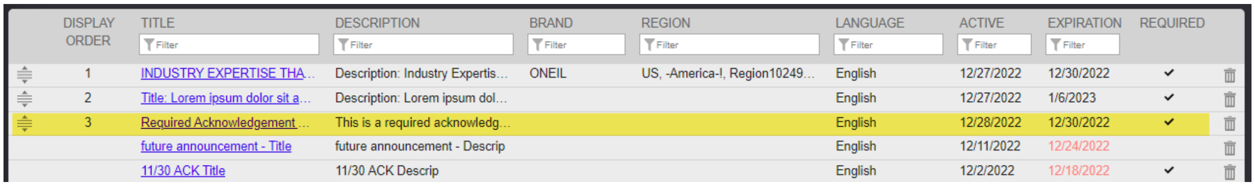


Figure 19-26. Require Acknowledgement and Display Order

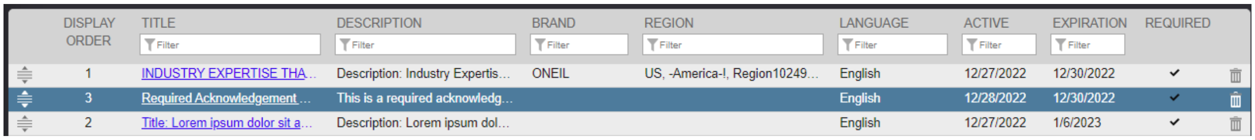
8. Click the Save button to save your changes.
9. The announcement should now show up in the list in the display order you designated.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION	REQUIRED
1	INDUSTRY EXPERTISE THA...	Description: Industry Expertis...	ONEIL	US, -America-!, Region10249...	English	12/27/2022	12/30/2022	✔
2	Title: Lorem ipsum dolor sit a...	Description: Lorem ipsum dol...			English	12/27/2022	1/6/2023	✔
3	Required Acknowledgement ...	This is a required acknowledg...			English	12/28/2022	12/30/2022	✔
	future announcement - Title	future announcement - Descrip			English	12/11/2022	12/24/2022	
	11/30 ACK Title	11/30 ACK Descrip			English	12/2/2022	12/18/2022	✔

Figure 19-27. Announcement With an Active Display Order

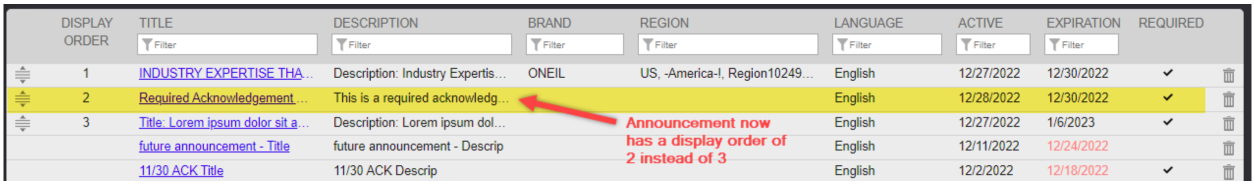
10. To change an active announcement's display order (position in the list), hover the mouse over the up/down arrow icon beside it on the left, wait until the hand icon appears, and then click and drag it up or down to the desired position.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION	REQUIRED
1	INDUSTRY EXPERTISE THA...	Description: Industry Expertis...	ONEIL	US, -America-!, Region10249...	English	12/27/2022	12/30/2022	✔
3	Required Acknowledgement ...	This is a required acknowledg...			English	12/28/2022	12/30/2022	✔
2	Title: Lorem ipsum dolor sit a...	Description: Lorem ipsum dol...			English	12/27/2022	1/6/2023	✔

Figure 19-28. Changing an Announcement's Display Order

11. The system will refresh the page and the numbers in the Display Order column will change automatically.



DISPLAY ORDER	TITLE	DESCRIPTION	BRAND	REGION	LANGUAGE	ACTIVE	EXPIRATION	REQUIRED
1	INDUSTRY EXPERTISE THA...	Description: Industry Expertis...	ONEIL	US, -America-!, Region10249...	English	12/27/2022	12/30/2022	✔
2	Required Acknowledgement ...	This is a required acknowledg...			English	12/28/2022	12/30/2022	✔
3	Title: Lorem ipsum dolor sit a...	Description: Lorem ipsum dol...			English	12/27/2022	1/6/2023	✔
	future announcement - Title	future announcement - Descrip			English	12/11/2022	12/24/2022	
	11/30 ACK Title	11/30 ACK Descrip			English	12/2/2022	12/18/2022	✔

Figure 19-29. Display Order Changed

NOTE: Only announcements with valid dates (dates that have not already expired) can have a display order. No matter where an announcement with a display order is moved within the list of announcements on the page, the system will group all active announcements with a display order together in the order you have specified.

12. When multiple announcements have been set to require users to acknowledge them, they will display on the Client home page per the display order that has been set.

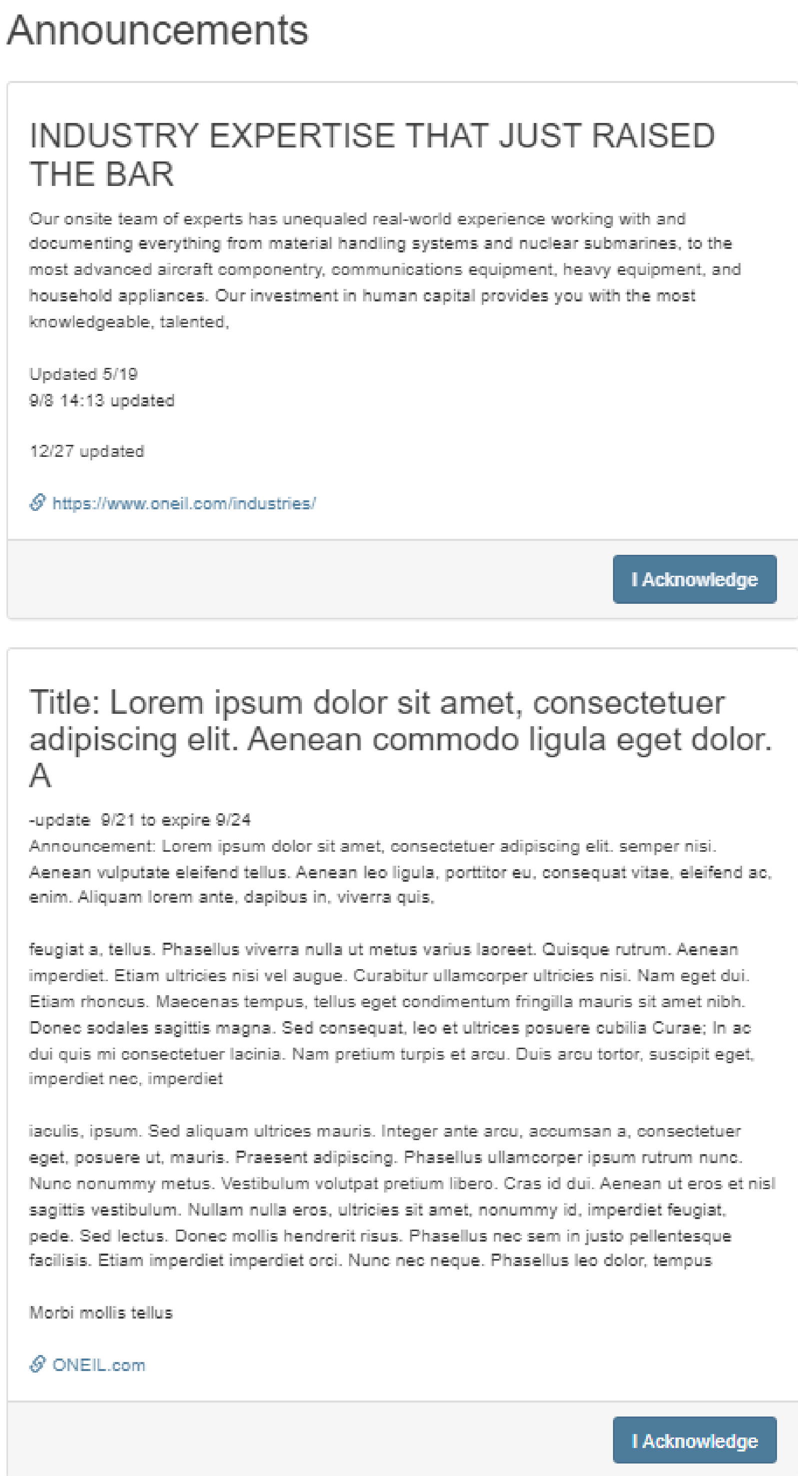


Figure 19-30. Multiple Announcements Requiring Acknowledgement

Setting Start and Expiration Dates for Announcements

Start and end dates can be set for an announcement when it is initially created. They can also be set or reset for existing announcements to display them again. Setting an announcement's start and end date is also covered under the instructions Creating an Announcement, but since there is more than one way to set these dates, the task is covered in more detail here.

Set a Start (Active) and End (Expiration) Date for an Announcement

1. Navigate to the Add/Edit Announcements page, under Announcements, in Administration.

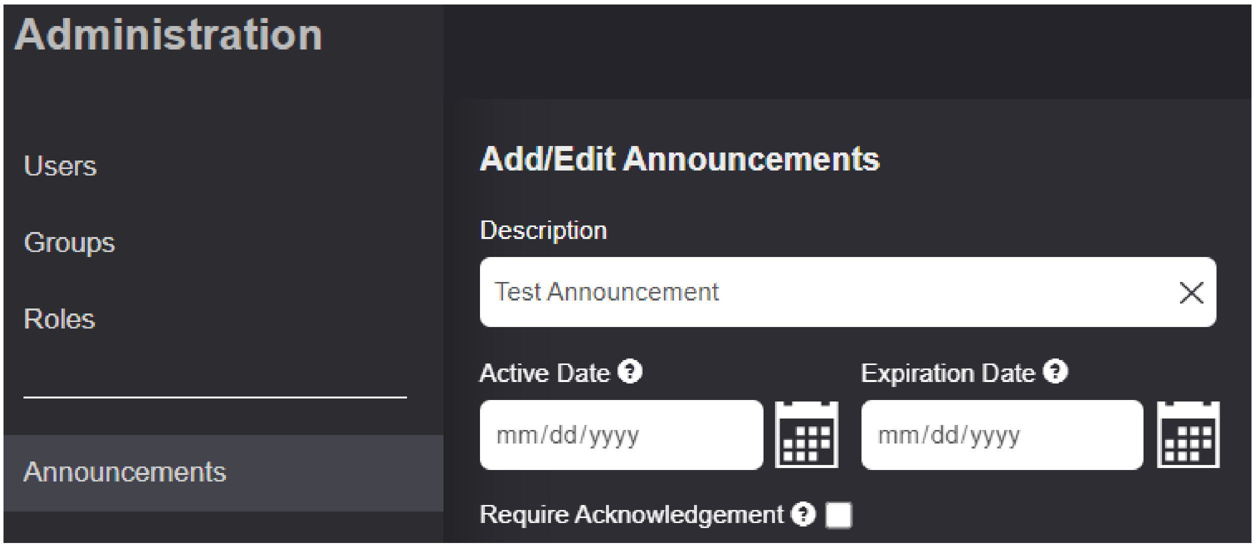


Figure 19-31. Add/Edit Announcements Page

2. Create a new announcement or select an existing announcement, if one exists, from the list in the bottom half of the Add/Edit Announcements page.
3. Enter a date for the announcement to display in the Active Date window.

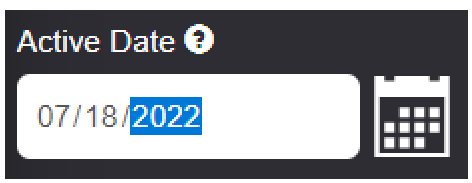


Figure 19-32. Active (Effective) Date

NOTE: You do not need to enter slashes in the date.

4. Alternatively, you can enter the date by clicking on the calendar icon beside the Active Date window.

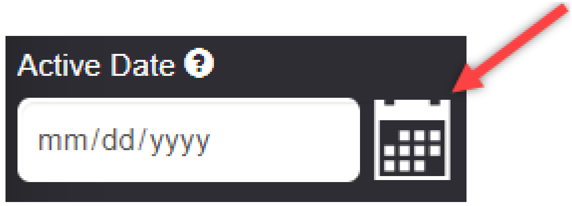


Figure 19-33. Calendar Icon

5. This will open a calendar pop-up window.

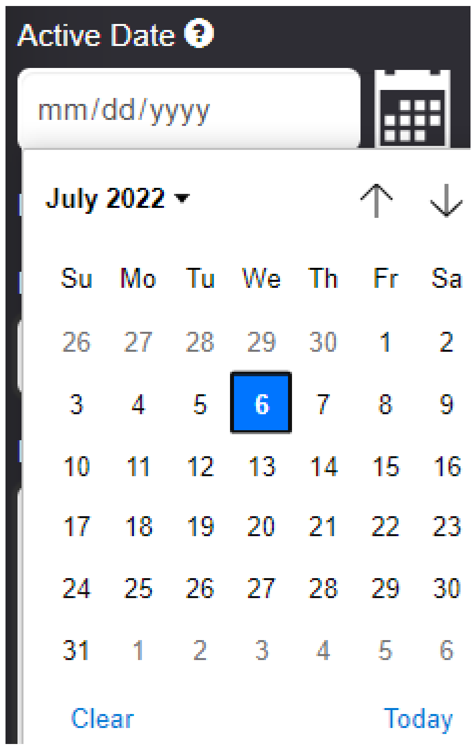


Figure 19-34. Calendar Pop-Up Window

a. To enter today's date, click on the Today link in the lower right of the pop-up window.
b. To enter a date within the current month but not today's date, select the desired date on the calendar.
c. To display the next month, click on the down arrow in the upper right of the pop-up window. Each press of the down arrow will advance the calendar to the next month.
d. To display a date that is farther in the future, you can click on the month and year drop down to display the following pop-up window.

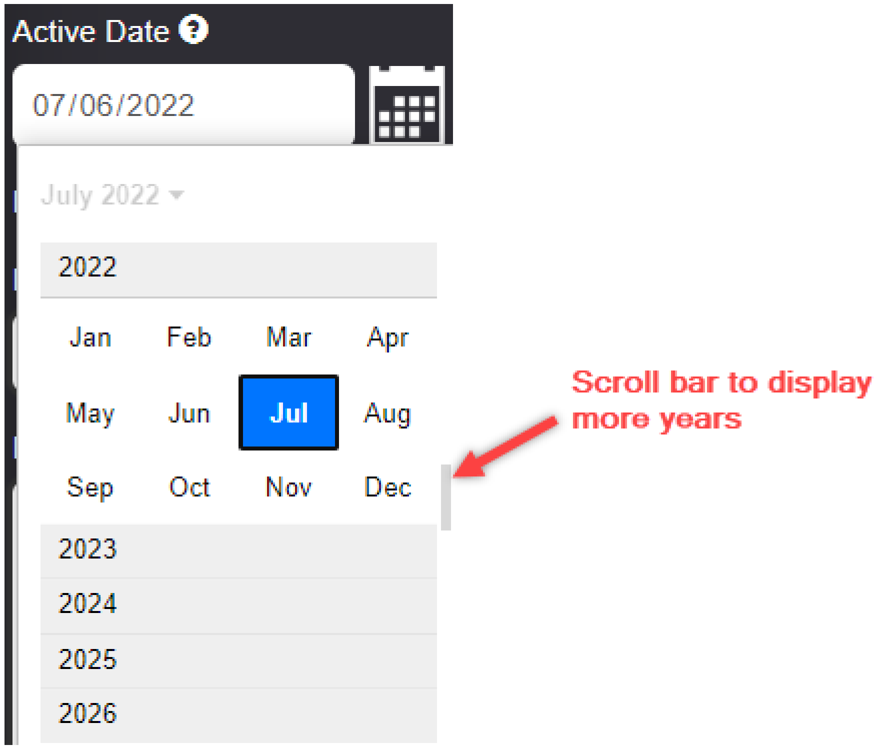


Figure 19-35. Month/Year Drop-Down List

  e. Click on the month displayed in the pop-up window, or click on a different year and then click on a month.
  f. Use the scroll bar to select another year, if necessary.
  g. To clear a previously entered date, click on the Clear link in the lower left of the pop-up window.

6. Repeat this process to specify an expiration date.

NOTE: Note that by checking the box next to Require Acknowledgement, the announcement will be displayed to the user as soon as they log into the ONeSOURCE Client. If this box is not checked, the announcement will be displayed under the Announcements tab only.

Requiring Announcements to be Acknowledged

To require users to acknowledge an announcement, the expiration date must not be expired and the require acknowledgement box must be checked.

To require users to acknowledge an announcement:

1. Click the Require Acknowledgement box on the Add/Edit Announcements page while creating or editing an announcement.

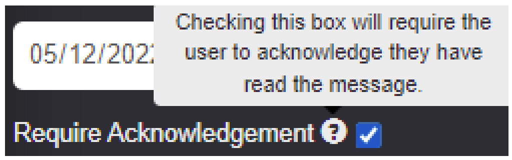


Figure 19-36. Require Acknowledgement Check Box

2. Ensure the announcement's expiration date is in the future (not yet expired). Refer to Setting Start and Expiration Dates for Announcements for instructions on setting the active and expiration dates.
3. Click the Save button to save changes and release the announcement. It may take some time for the announcement to show up on the ONeSOURCE Client home page.
4. When the announcement displays on the home page of the Client, verify it displays properly. A pop-up window should display with a button to acknowledge the announcement.

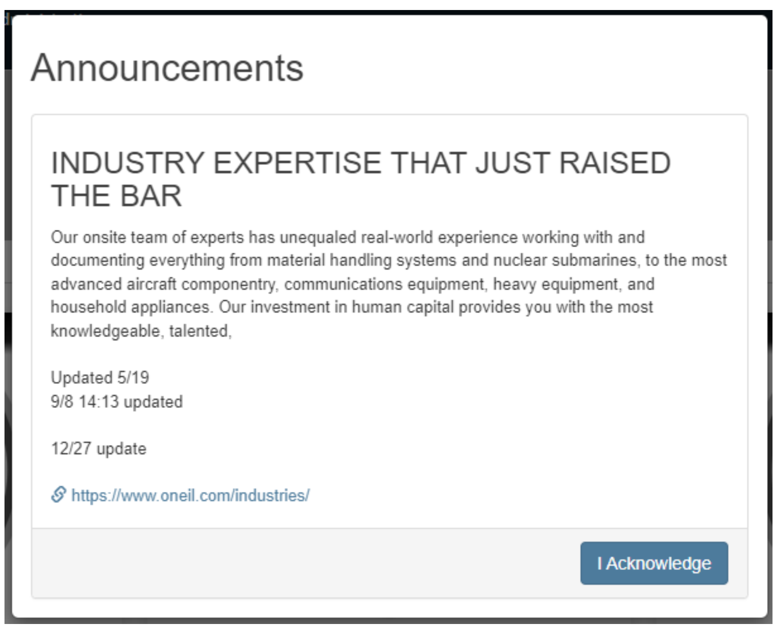


Figure 19-37. Acknowledging an Announcement

5. Click on the **I Acknowledge** button to close the announcement pop-up window.
6. The announcement will still be available on the Announcements page within the ONeSOURCE Client.
   a. Click on the Announcements tab.

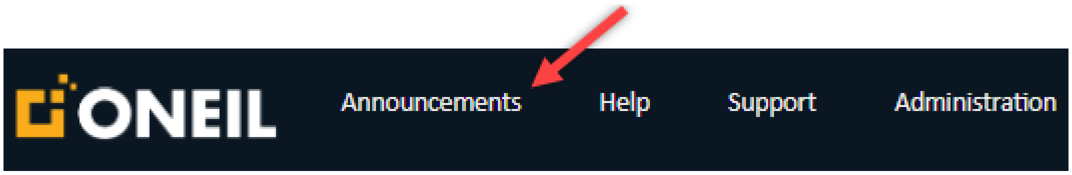


Figure 19-38. Announcements Tab

   b. Announcements that have not expired will display.

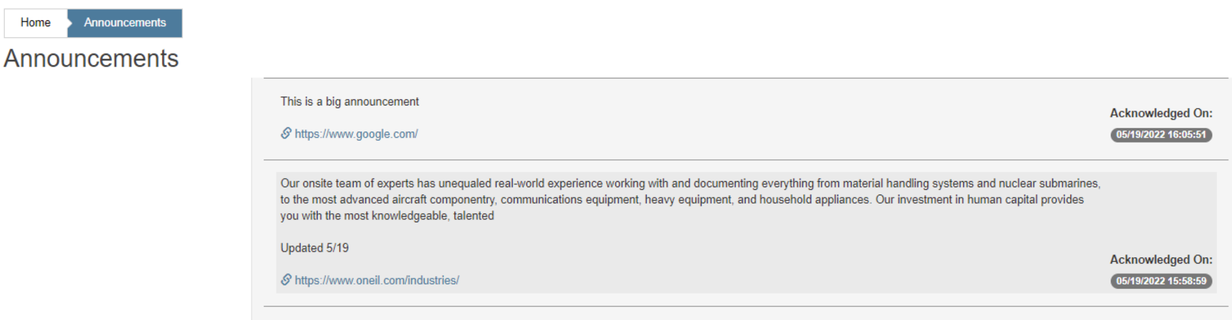


Figure 19-39. Announcements Displayed in Client

To Reset an Announcement for Acknowledgement

Once an announcement has been acknowledged by the user, it will not have to be acknowledged again unless an Administrator resets it.

1. Select the announcement to be reset.

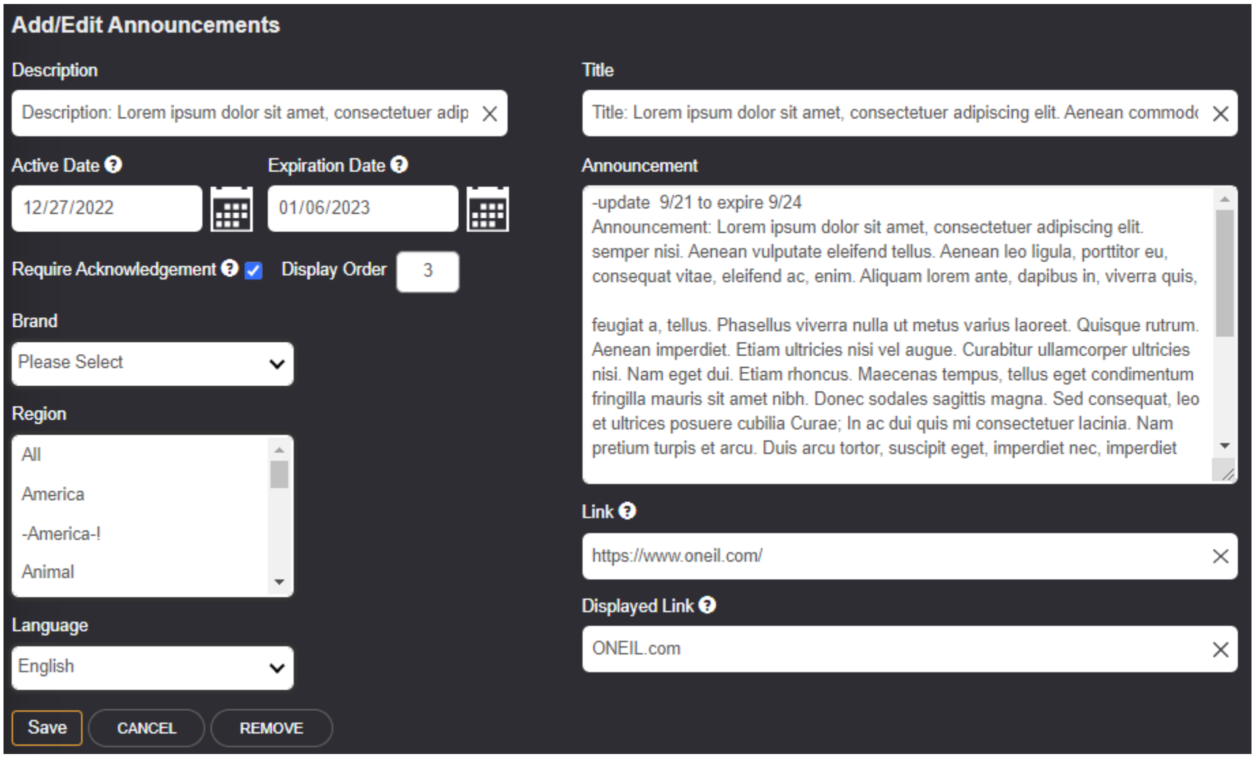


Figure 19-40. Selected Announcement

2. Uncheck the box next to Require Acknowledgement.

Figure 19-41. Require Acknowledgement Checkbox

3. Recheck the Require Acknowledgement box.

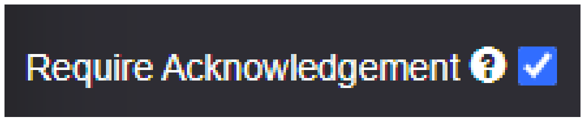


Figure 19-42. Require Acknowledgement Checkbox

4. Ensure the date in the Expiration Date window has not expired.
5. Save the announcement.

Figure 19-43. Save Announcement Button

6. Log out of the ONeSOURCE Client and then log back in.
7. The announcement you reset for acknowledgement should display when users log back in.

Viewing Announcements

This section is for creating and editing announcements in the ONeSOURCE Client by Administrators. Refer to Announcements for more information on viewing announcements after they have been created.

Administration - Feedbacks

Managing Feedbacks

Feedback management is done on the Administration tab in web version of the ONeSOURCE Client. It is from here the administrator can view all feedback that has been submitted for their organization, as well as update the status, assign to specific individuals, and add comments. Refer to Sending Feedback for instructions on submitting and viewing feedbacks under one's own user account.

Viewing All Feedback Entries

From the **Administration** tab, Administrators can view all feedback submited by individuals in their organization.

To View All Feedback Entries

1. Click the **Administration** tab.

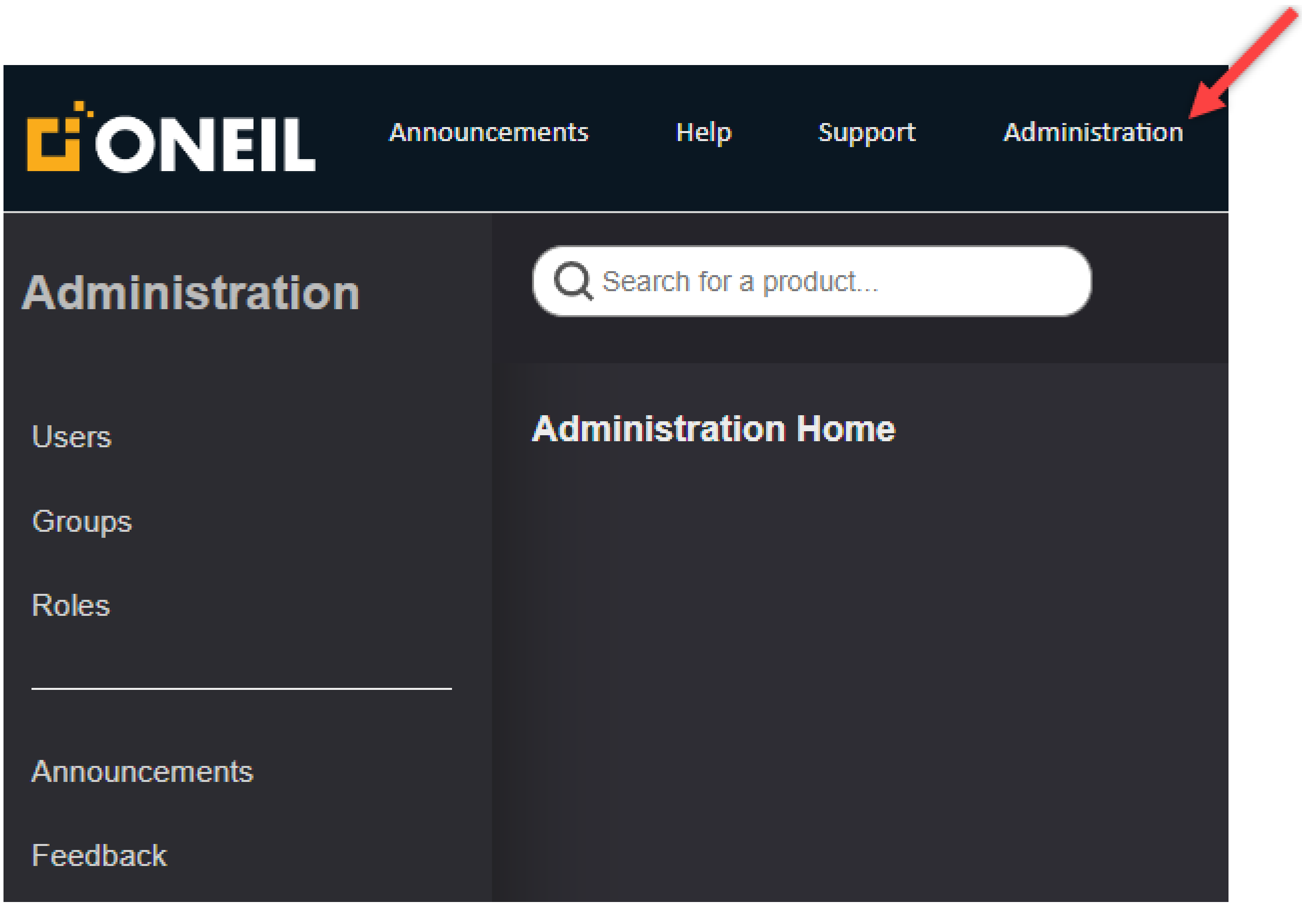


Figure 20-1. Administration Tab

2. Click Feedback on the left.

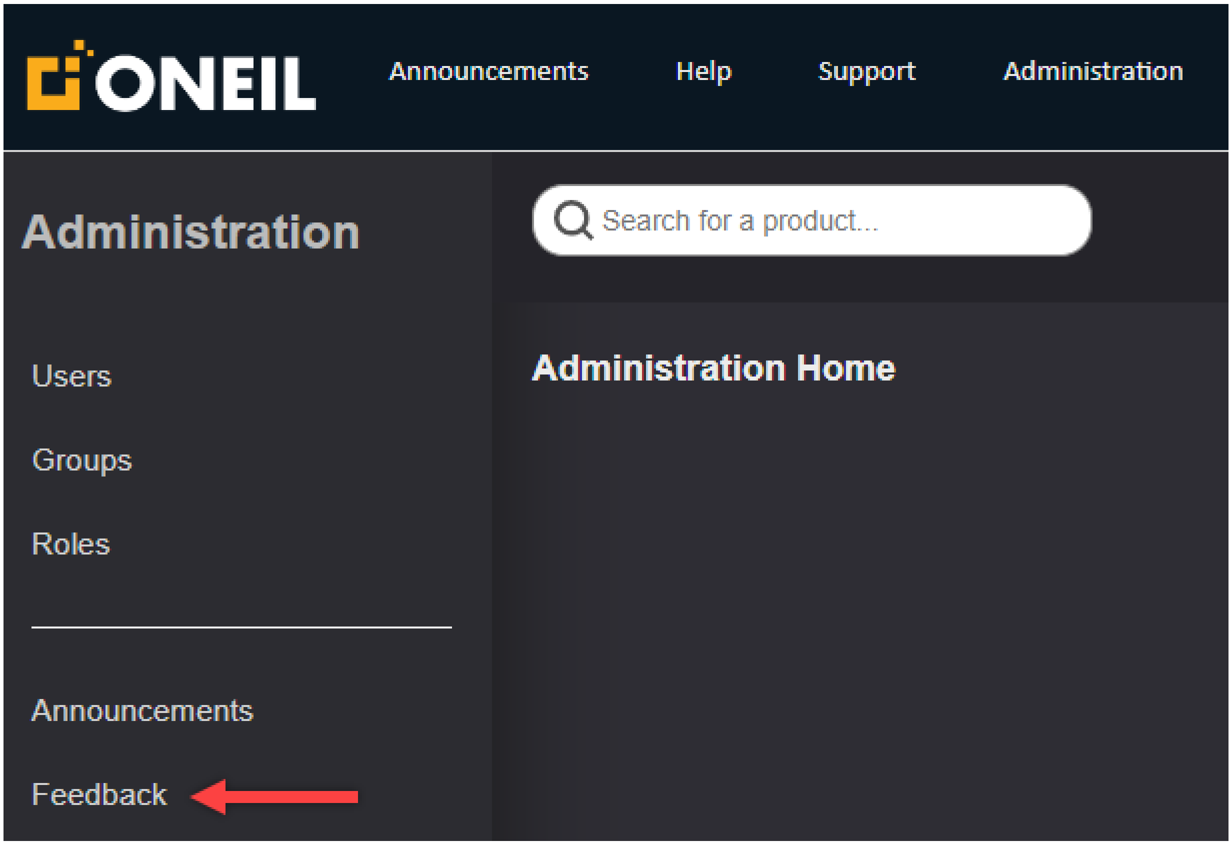


Figure 20-2. Feedback

3. The list of feedback entries will display.

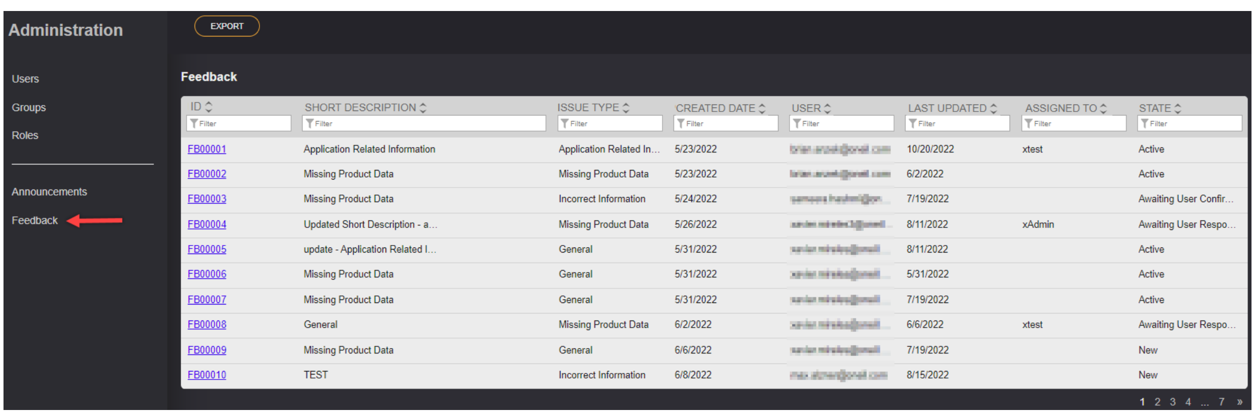


Figure 20-3. List of Feedback Entries

NOTE:

a. A maximum of 10 feedback entries can be displayed per screen. If there are more than 10 feedback entries total, navigation links will display so users can navigate to the other feedback screens.

b. Use the various filters as needed to find specific feedback entries.

c. Date format will be updated based on users profile language setting.

d. Click the up/down arrows in specific column headers to toggle the list in ascending or descending order.

e. Some ONeSOURCE Client configurations may include an additional applicability field on the Feedback screen. The field can help Administrators filter feedbacks based on this additional applicability. The applicability will display between the ID and Short Description on the Feedback screen.

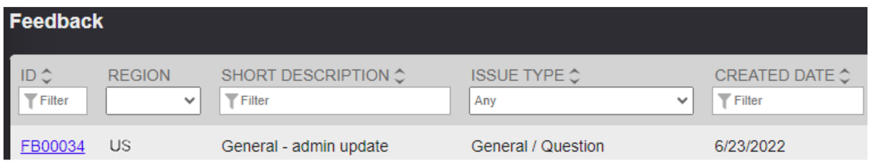


Figure 20-4. Feedback Screen Showing an Additional Applicability - Region

Editing Feedbacks - Administrator

Administrators can also open individual feedbacks to view specific details, add comments, and assign them to individuals within their organization.

To Manage Feedback Details

1. Click on the **Administration** tab.

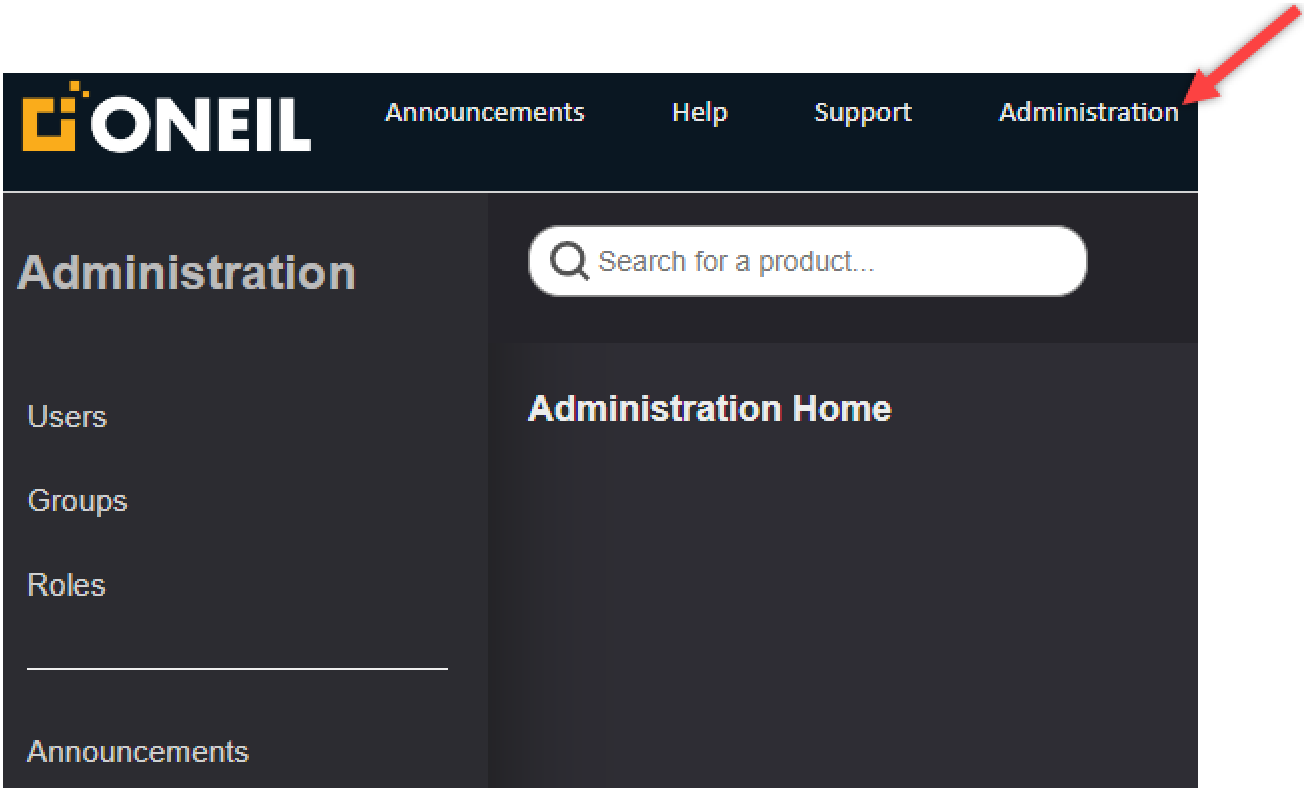


Figure 20-5. Administration Tab

2. Click on Feedback on the left.

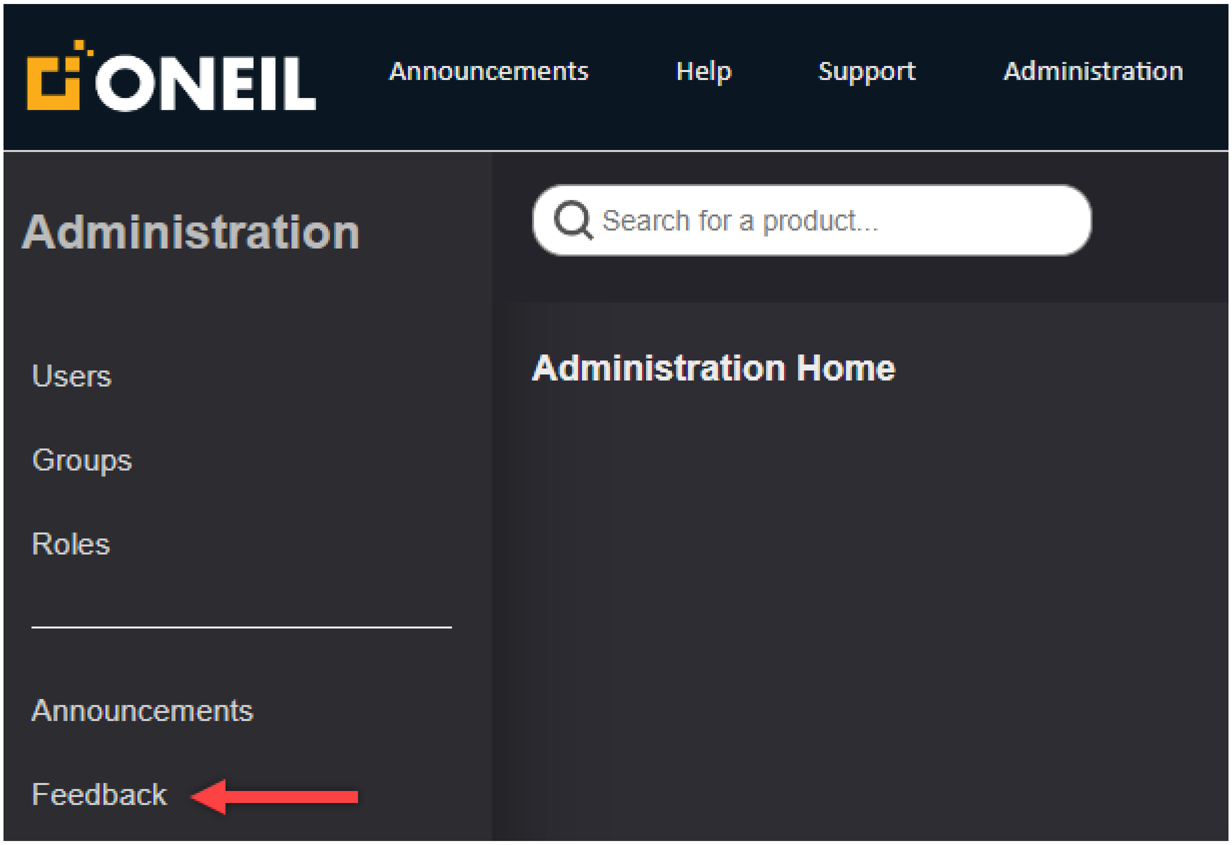


Figure 20-6. Feedback

3. The list of feedback entries will display.

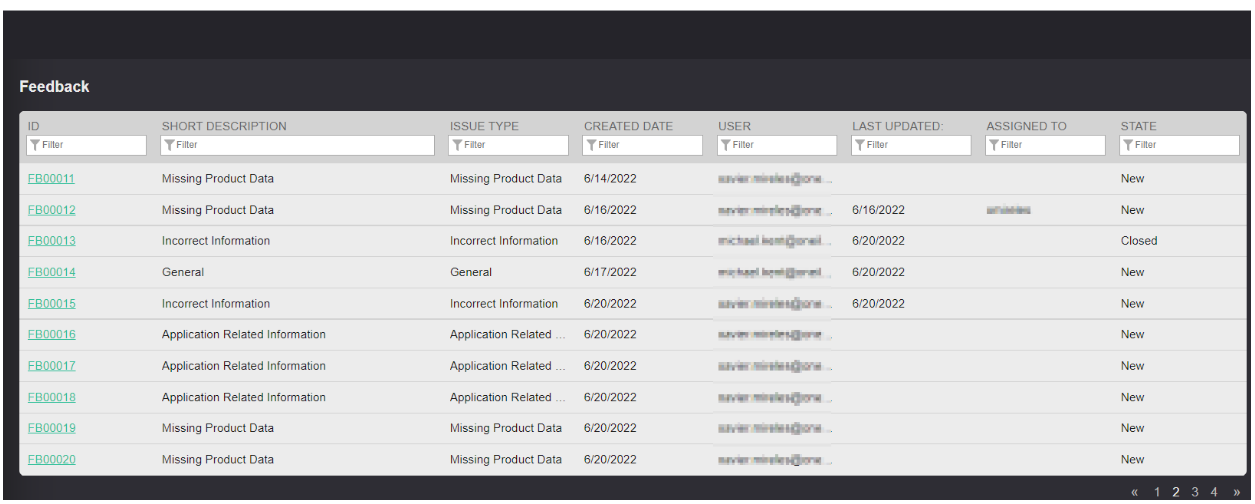


Figure 20-7. List of Feedback Entries

4. Click on the ID of the feedback entry you wish to open.

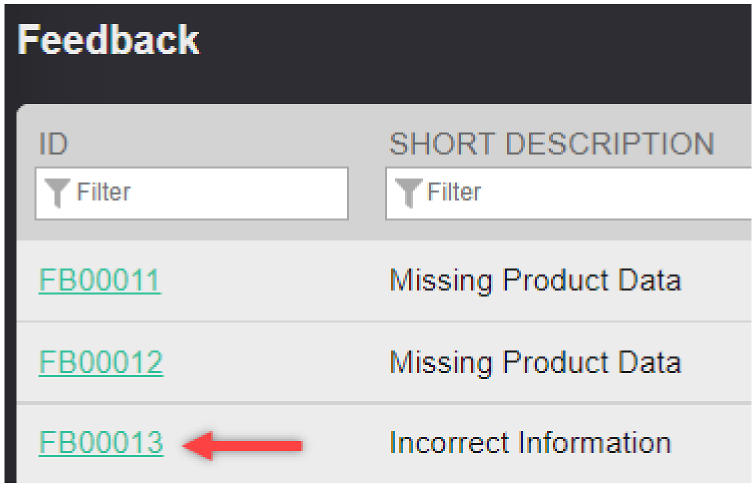


Figure 20-8. Feedback Entry

5. The Manage Feedback page will open displaying the details of the selected feedback.

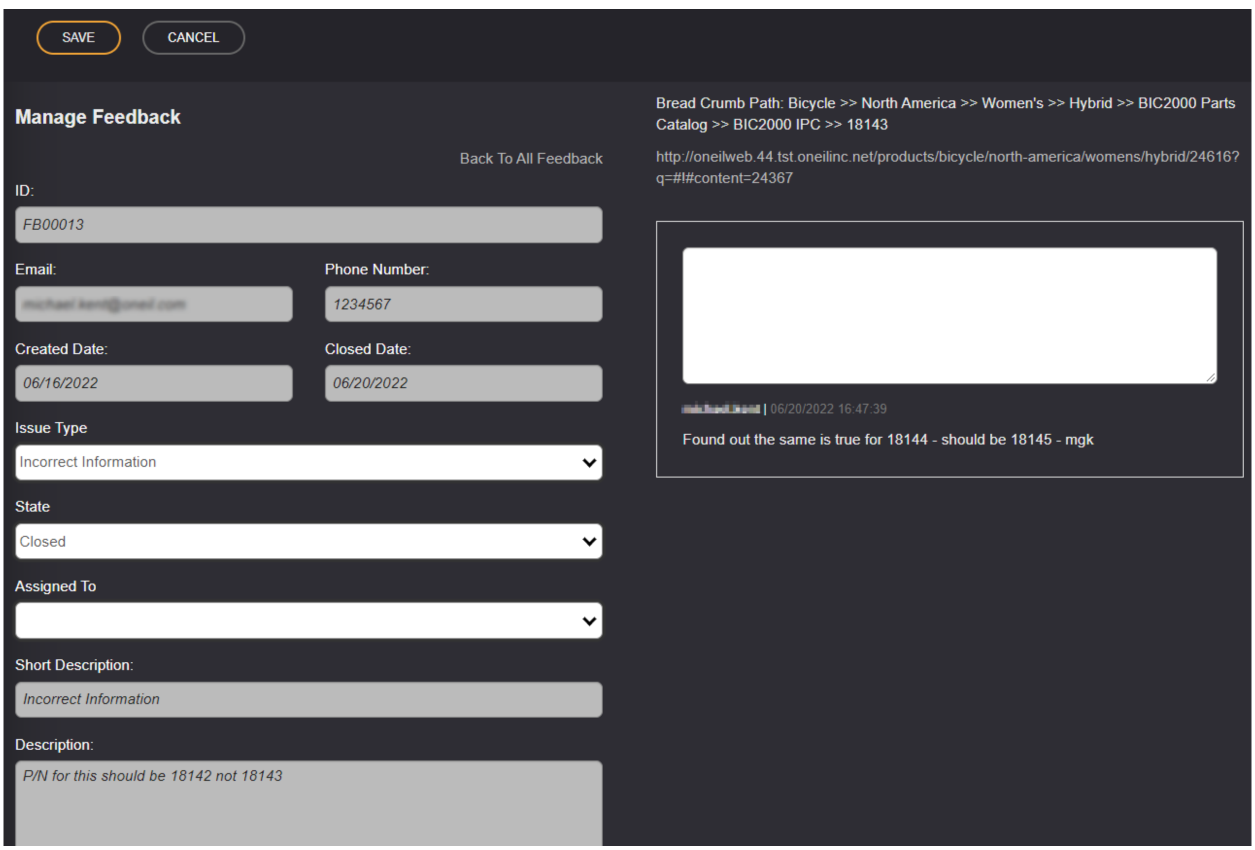


Figure 20-9. Manage Feedback Page

6. Provided the Administrator has edit/write permissions, the following fields can be changed or added:
   - Issue Type
   - Issue State
   - Assigned To
   - Short Description (see Note)
   - Description (see Note)
   - Comments

NOTE: Depending on the Administrator's customer configuration, these fields may also be available to edit.

7. For the **Issue Type**, **Issue State**, and **Assigned To** fields, use the drop-down lists to choose a value.
8. To add comments, enter them in the window and then click the **Save** button beneath the comments box.

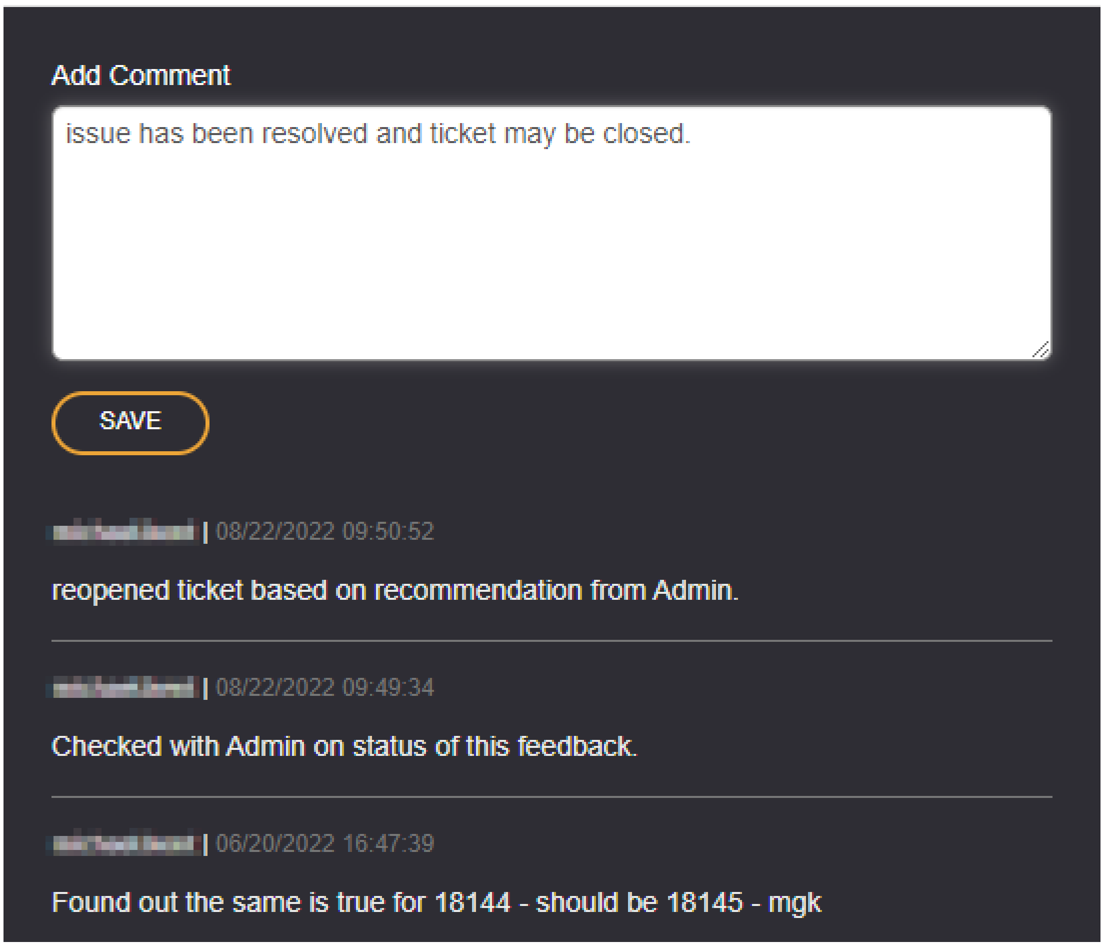


Figure 20-10. Add Comment Window

9. You can also click on the **Save** button at the top of the Manage Feedback page to save comments.

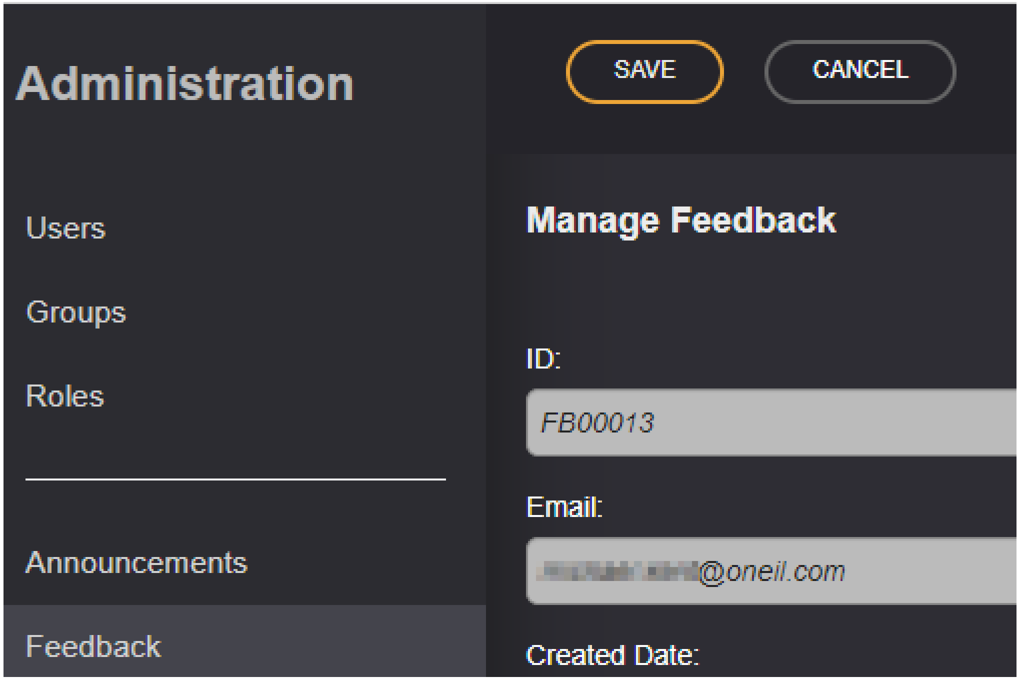


Figure 20-11. Save Button

Previously entered comments will display beneath the box and list who entered them as well as date and time stamps for each one as shown in the above screenshot.

10. When a feedback is updated by the Administrator, the system will send an e-mail to both the user and the Administrator with the following information:
   - Feedback ID number
   - Name of the user who submitted the feedback
   - Name of the administrator in parentheses
   - Name of the user's company
   - State of the feedback
   - User who the feedback is assigned to
   - Issue Type
   - Short Description
   - Detailed Description
   - Comment By (the username of the Administrator)
   - Comment
   - Changes (summary of the change/edit made)
   - Breadcrumb
   - A link to the Manage Feedback page for the specific feedback
11. Click the **Back to All Feedback** link to return to page one of the feedbacks.
12. Click the **Cancel** button to return to the feedback page you were on.

13. Following is a sample e-mail received by the user after it was edited by an administrator.

From: ONeSOURCE <noreply@oneil.com>
Sent: Tuesday, February 14, 2023 4:26 PM
To: OneSourceSupport <OneSourceSupport@oneil.com>
Cc: [illegible]
Subject: (TST) Feedback Update from ONeSOURCE ONA Client

Feedback ID:	FB00007
Feedback From:	Joe User ([username of Administrator])
Company:	ONEIL
State:	Awaiting User Confirmation
Assigned To:	Alice
Issue Type:	General
Short Description:	Missing Product Data
Detailed Description:	Admin level feedback as user 220531_1612
New Comment:	
Comment By:	[username of Administrator]
Comment:	changed state to awaiting user confirmation.
Changes:	
State:	changed from Awaiting User Response

Figure 20-12. Sample User Feedback E-Mail with Administrator Changes

Exporting All Feedback Entries

Adminstrators can also export all submitted feedbacks to a file so they can manipulate the data.

To Export All Feedback

1. Click the **Administration** tab.

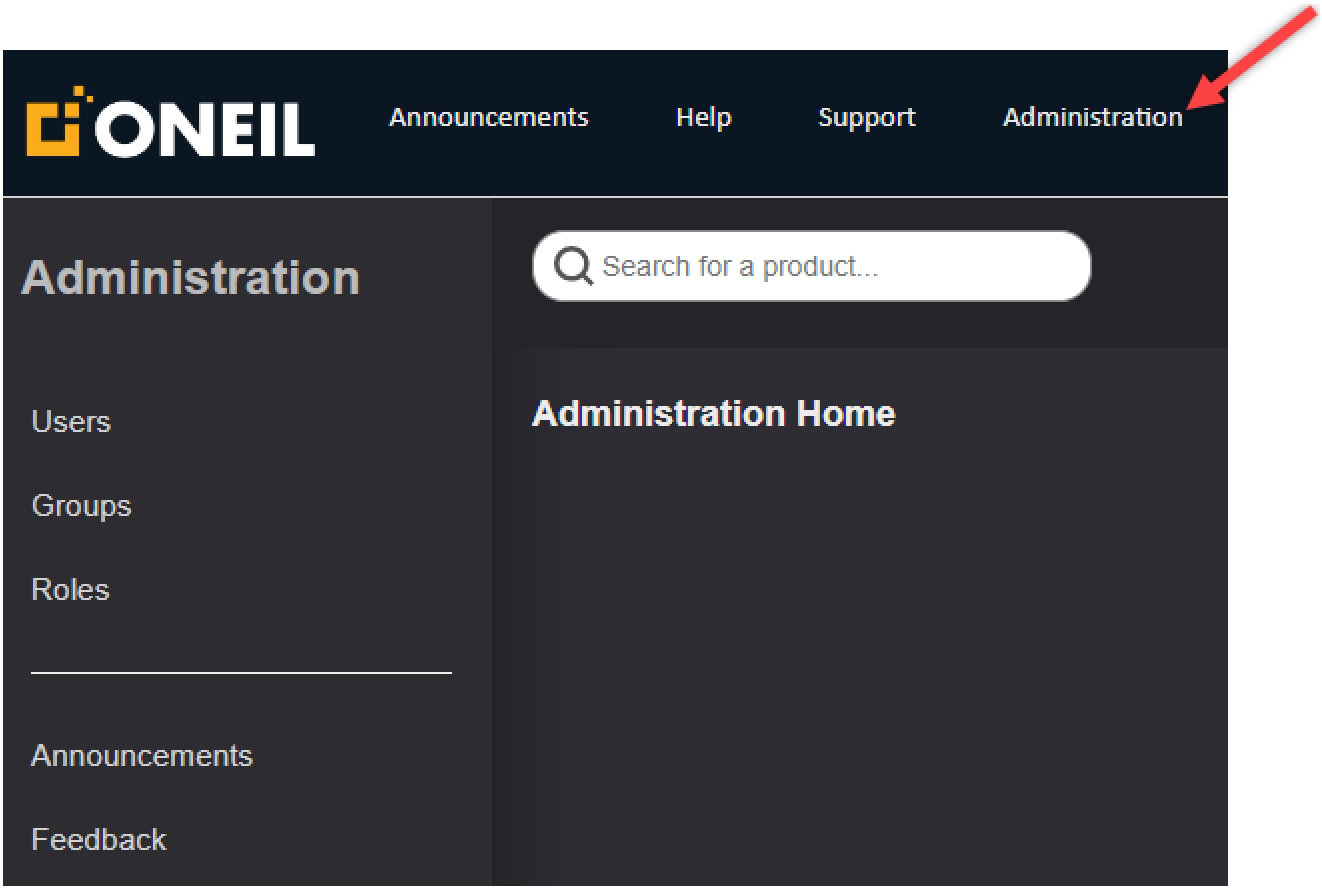


Figure 20-13. Administration Tab

2. Click **Feedback** on the left.

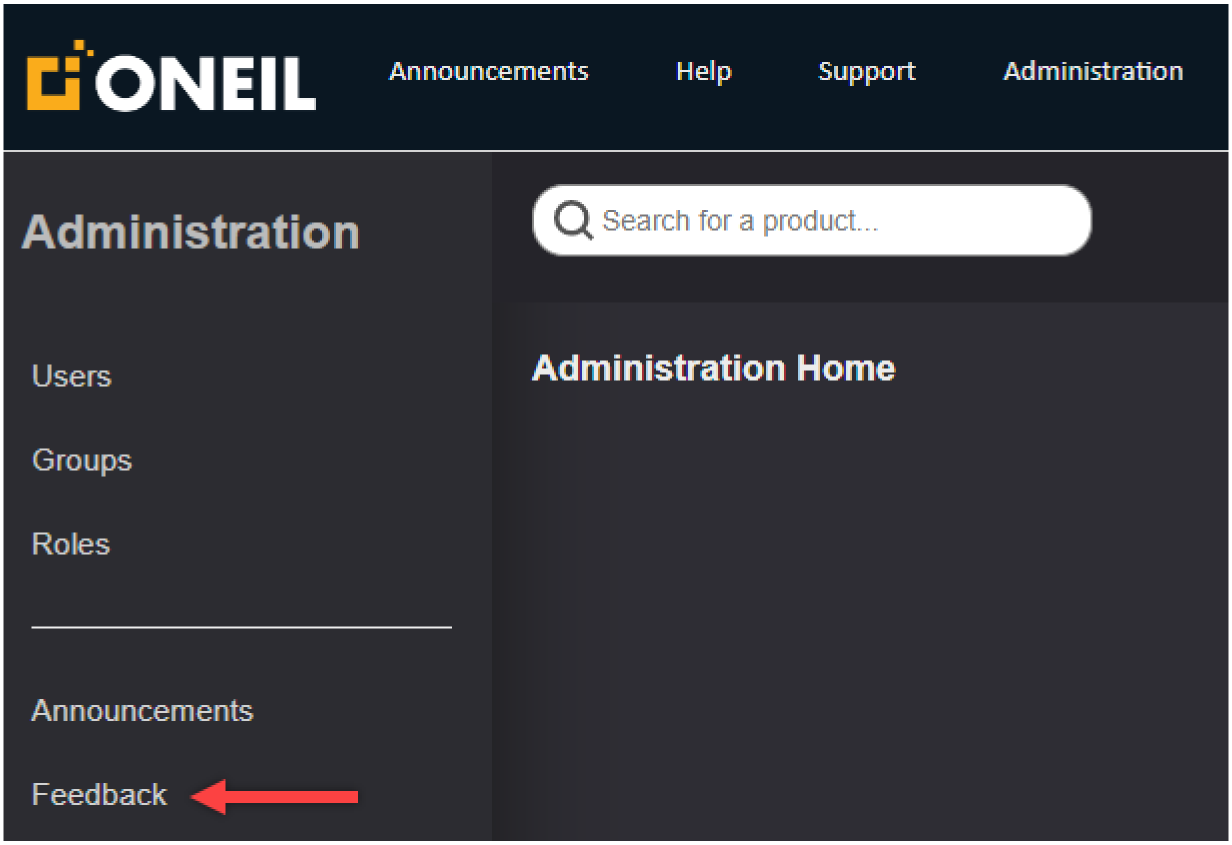
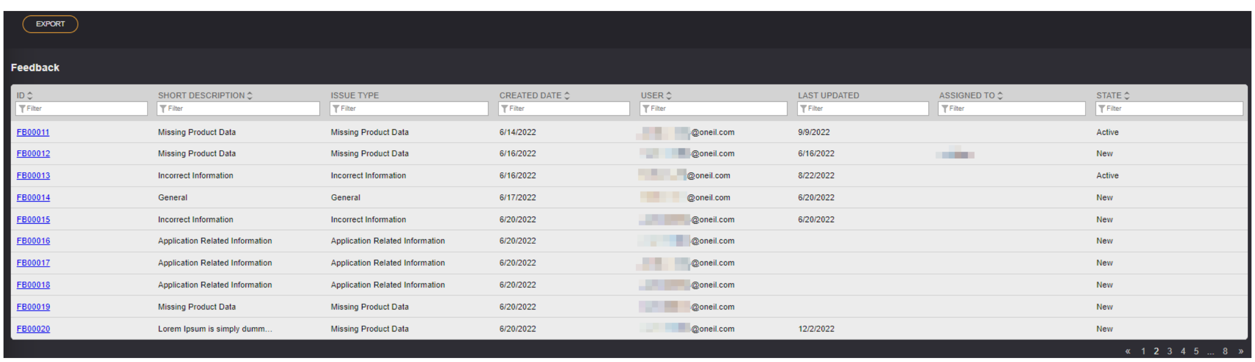


Figure 20-14. Feedback

3. The list of feedback entries will display.



EXPORT

Feedback

ID	SHORT DESCRIPTION	ISSUE TYPE	CREATED DATE	USER	LAST UPDATED	ASSIGNED TO	STATE
FB00011	Missing Product Data	Missing Product Data	6/14/2022	@oneil.com	9/9/2022		Active
FB00012	Missing Product Data	Missing Product Data	6/16/2022	@oneil.com	6/16/2022		New
FB00013	Incorrect Information	Incorrect Information	6/16/2022	@oneil.com	8/22/2022		Active
FB00014	General	General	6/17/2022	@oneil.com	6/20/2022		New
FB00015	Incorrect Information	Incorrect Information	6/20/2022	@oneil.com	6/20/2022		New
FB00016	Application Related Information	Application Related Information	6/20/2022	@oneil.com			New
FB00017	Application Related Information	Application Related Information	6/20/2022	@oneil.com			New
FB00018	Application Related Information	Application Related Information	6/20/2022	@oneil.com			New
FB00019	Missing Product Data	Missing Product Data	6/20/2022	@oneil.com			New
FB00020	Lorem Ipsum is simply dumm...	Missing Product Data	6/20/2022	@oneil.com	12/2/2022		New

« 1 2 3 4 5 ... 8 »

Figure 20-15. List of Feedback Entries

4. Click the Export button to download the feedback entries to a .csv spreadsheet.

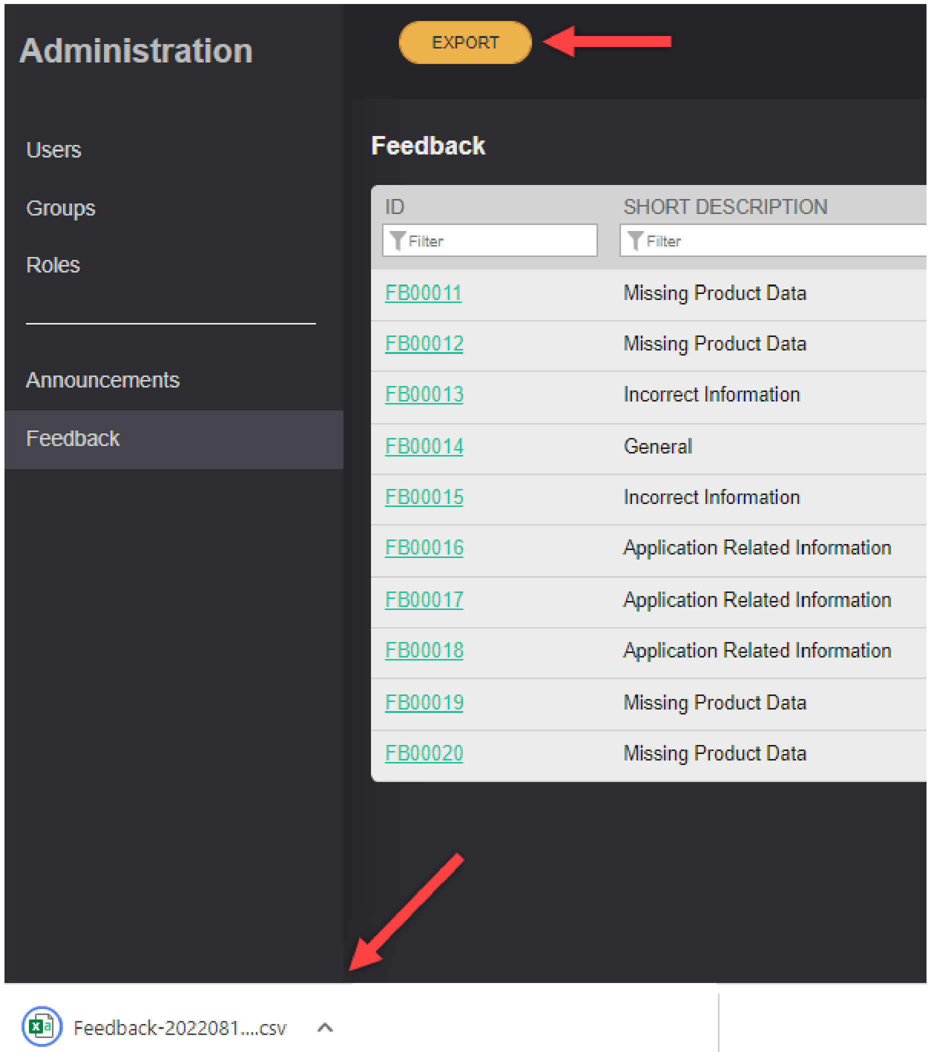


Figure 20-16. Export Button

NOTE: The .csv file should also appear in the user's Downloads folder.

5. The .csv file will have the following column headers:
   - ID
   - Short Description
   - Issue Type
   - Created Date
   - User
   - Last Updated
   - Assigned To
   - State
   - Username
   - First Name
   - Last Name

- Detailed Description
- Breadcrumb

6. Each field in the output will be comma-delimited.

Administration - User Management

User Management - Introduction

User management allows administrators to manage users within the system. Through user management, administrators can create users and user groups, assign roles, and grant permissions to control access to specific content. User management tools are located under the Administration tab in the web version of the ONeSOURCE Client only. The User Management tools are not available in the installed version of the Client.

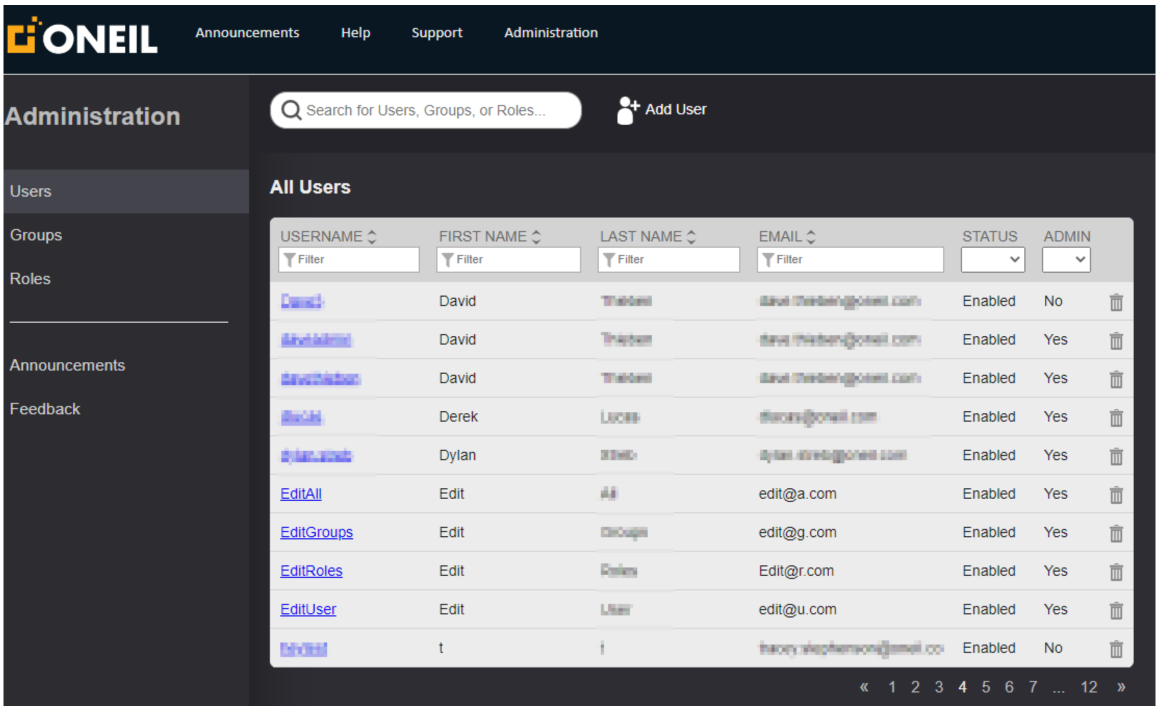


Figure 21-1. User Management Screen

What is a User?

A user represents a person in the system. Within the context of user management, a user is a container for roles, which control the activities and content the person may perform or access.

Roles are assigned by the Administrator but will also include roles that are inherited from the parent group.

Users are currently allowed to be a member of one group only.

What is a Group?

A group can contain another group (as a child group's parent), roles and applicabilities, and individual users.

Groups are either parent or child groups. Parent groups may only contain one child group, and child groups may only have one parent group. In addition to child and parent groups, there are guest and default groups.

A guest group is automatically created by the system if guest access has been enabled. A default group is automatically assigned to new users who are not assigned to any other group. There is only one of each of these groups per customer.

Users contained in groups may be granted or restricted access to areas of the system at one time, instead of having to go to each individual user record to do so.

What is a Role?

A role is a container for permissions and content subtypes. On the Add/Edit Role page, all available permissions and content subtypes are listed with checkoxes for the administrator to add or remove access. Enabling the permssion or content subtype means the role can perform the activity tied to the permission and also access content tied to the assigned subtype.

What is an Applicability?

An applicability is a piece of metadata that describes the content. Applicabilities are authored in the ONePUBS Content Management System (CMS) and released so they're available for selection in the ONeSOURCE Client under User Management. Applicabilities are tied to **Groups** only. Assigning an applicability to a group means the group can only access content that has the same applicability.

The current applicability types are:

1. Brand
2. Class
3. Customer
4. Industry
5. Location
6. Manufacturer
7. Product Category
8. Product Group
9. Product Line
10. Region
11. Serial Number Range
12. System
13. Subsystem

Once an applicability has been released from the CMS, it can be selected using the Add Applicability flyout on the Add/Edit Group screen.

Figure 21-2. Applicability Flyout - Closed

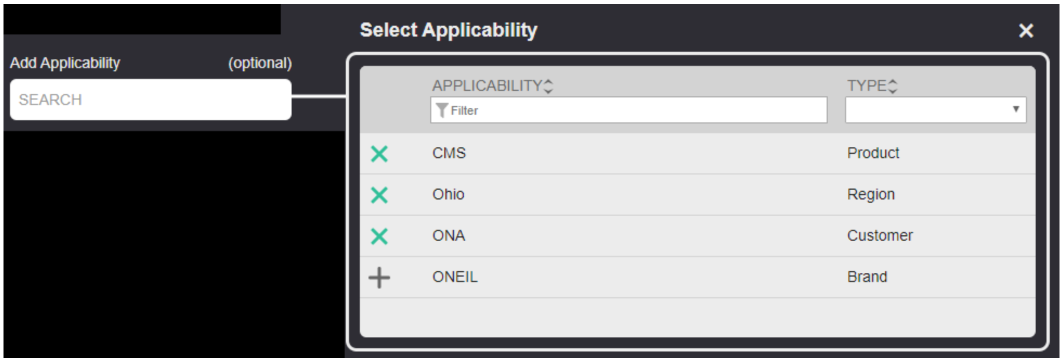


Figure 21-3. Applicability Flyout - Open

As with roles, applicabilities can be assigned by an administrator or inherited from the parent group.

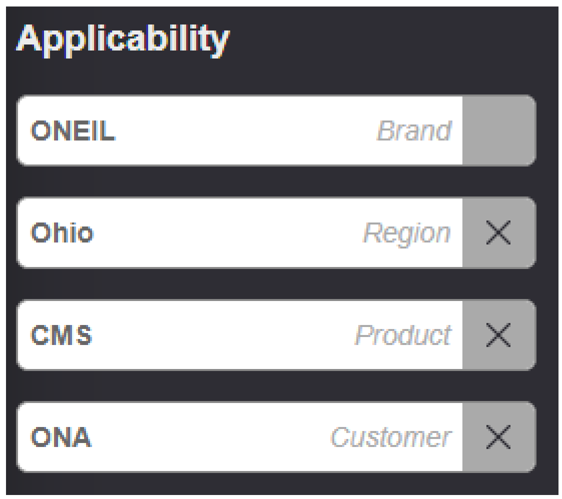


Figure 21-4. Sample Applicabilities Added to a Group

NOTE:

a. The applicability type will be listed to the right of the applicability value (e.g., Brand, Region, Product, Customer, etc.).

b. Applicabilities assigned by an administrator will also have an X beside them to show that they can be removed.

c. Applicabilities that do not have an X are inherited from the parent group and can only be removed from the parent group.

Refer to Adding/Editing Groups for instructions on how to add or edit groups.

What is a Permission?

A permission is the smallest unit of control in the system. Permissions are used to control functionality that is not applicability- or content-specific.

There are three types of permissions: content access permissions, general permissions, and administration permissions. Content access permissions are *granted* to all users initially until they are constrained later by assigned roles. Most general permissions are granted while all administrative permissions are *denied* to all users until they are allowed later by an Administrator. All three permissions are read-only and only tied to **Roles**.

Content Access Permissions

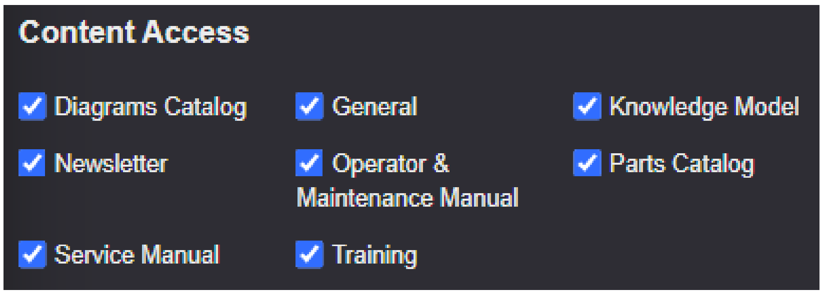


Figure 21-5. Content Access

Since users initially are granted access to all content types, all of the check boxes are checked until they are constrained later by the roles assigned.

General Permissions

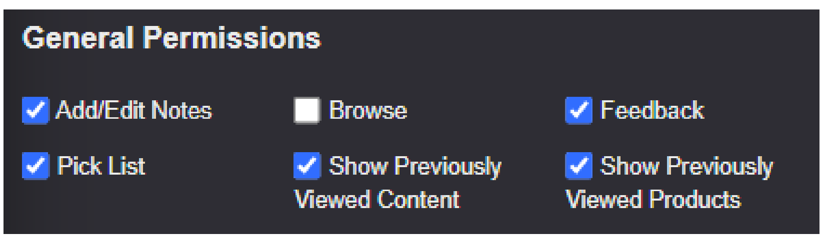


Figure 21-6. General Permissions

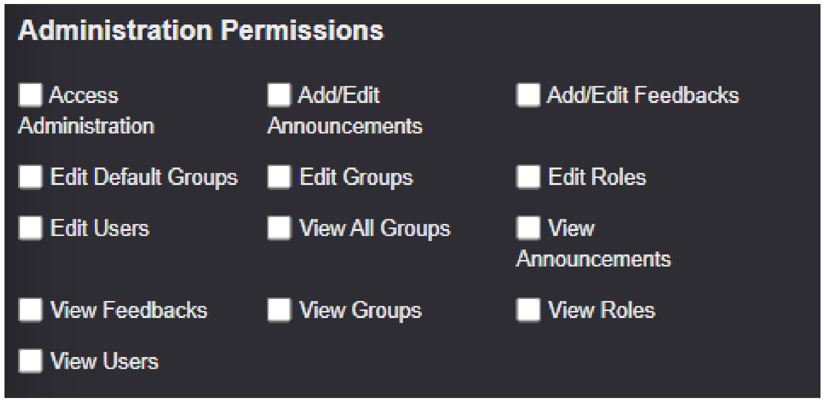


Figure 21-7. Administrative Permissions

For general and administrative permissions, five general permissions and zero administrative permissions have been granted.

Effective Permissions

Effective permissions refer to the combination of permissions tied to roles assigned to both individual users and groups. This means a user can have permissions as a result of roles assigned to them by an Administrator, roles assigned to the group the user belongs to, and roles assigned to the parent group of a child group.

This can be best understood by looking at the permissions tied to a sample user, a child group, and its parent group.

Since permissions are ultimately tied to roles, let us look at the roles assigned to a sample user.

1. The user belongs to the ABC Group, and has three roles assigned.

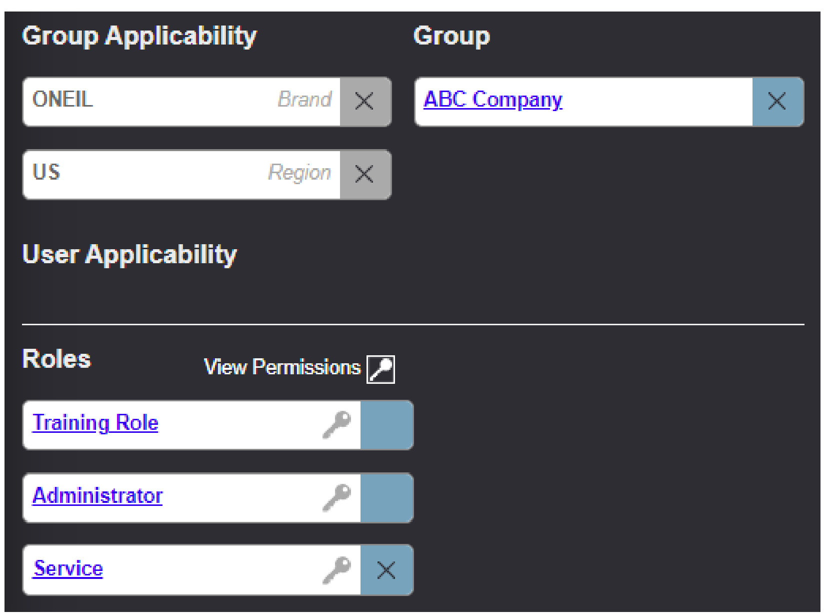


Figure 21-8. Sample User Record - Groups and Roles

NOTE: The role with an X next to it indicates it was assigned by an Administrator. The roles that do not have an X beside them indicate they were inherited, either because they belong to the group assigned to the user, or because they belong to the parent group of the assigned group.

2. To view all assigned permissions, click on the View Permissions and key icon to the right of the Roles section.

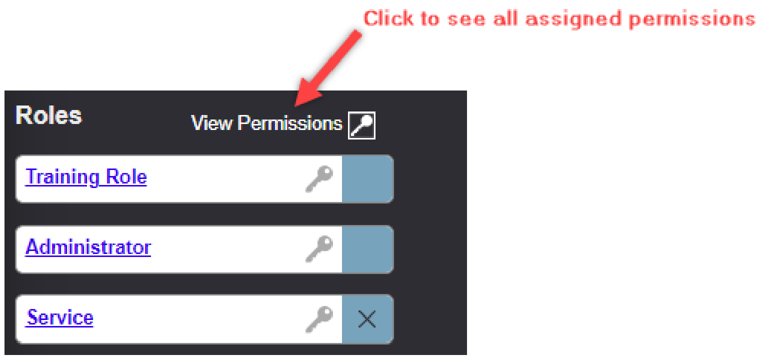


Figure 21-9. View Permissions Icon

3. The complete list of Content Access, Administration, and General permissions will display in the upper right of the browser.

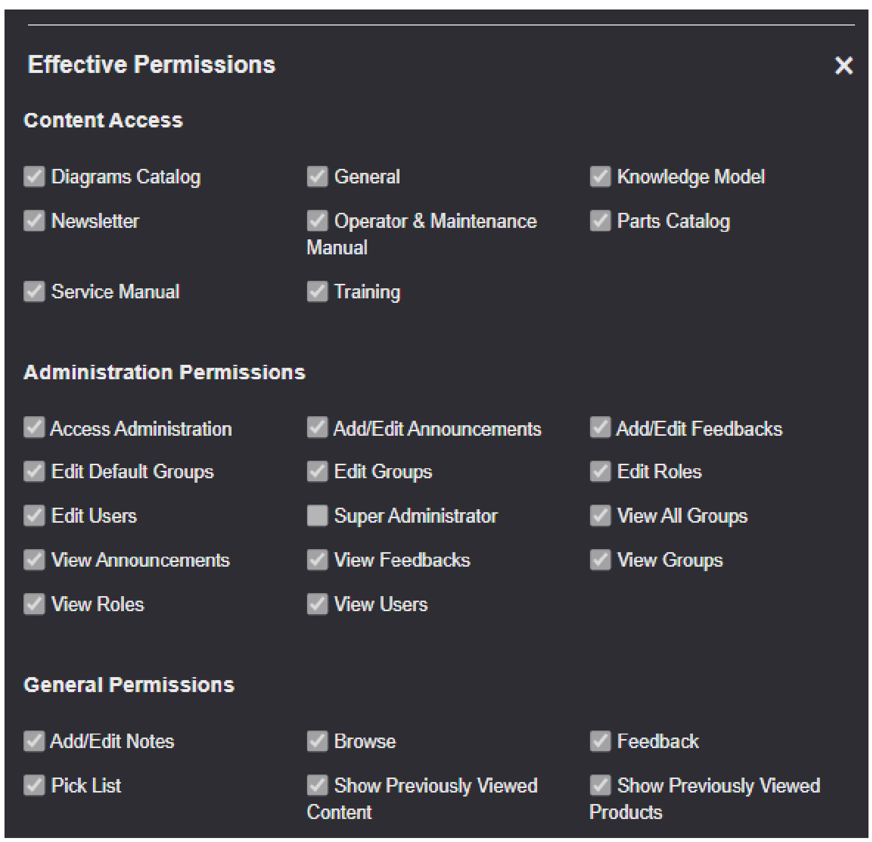


Figure 21-10. View All Permissions

4. To view the permissions assigned to an individual role, click on the square, highlighted area to the right of the role, or click on the role name. Clicking on the square to the right of the role will display the permissions in the same Add/Edit User screen.

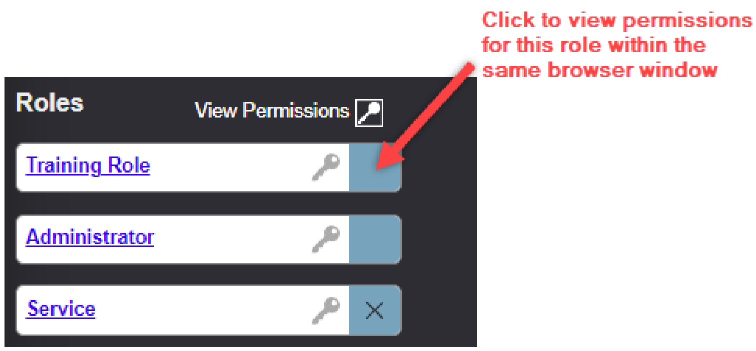


Figure 21-11. Click on End of Row

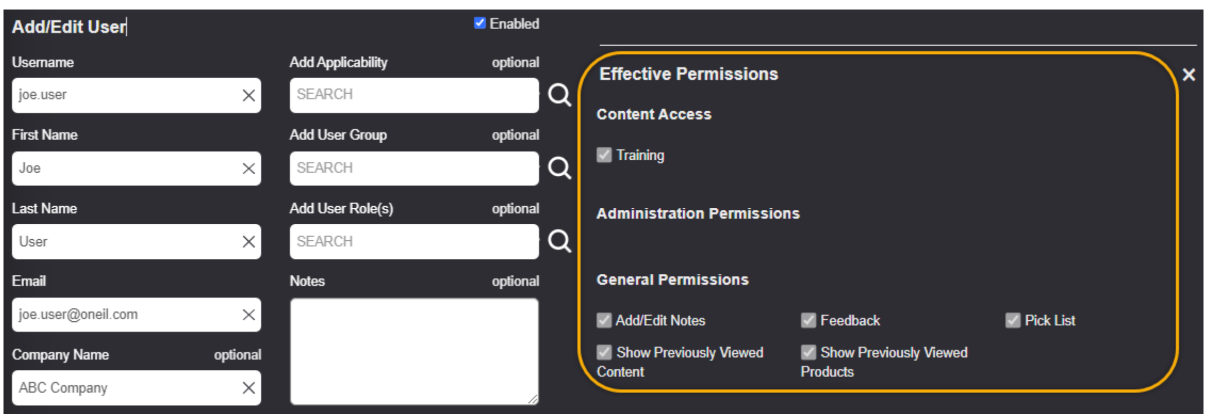


Figure 21-12. Role Permissions

5. Clicking on the role name will open the Add/Edit Role screen in a new browser window to display the permissions.

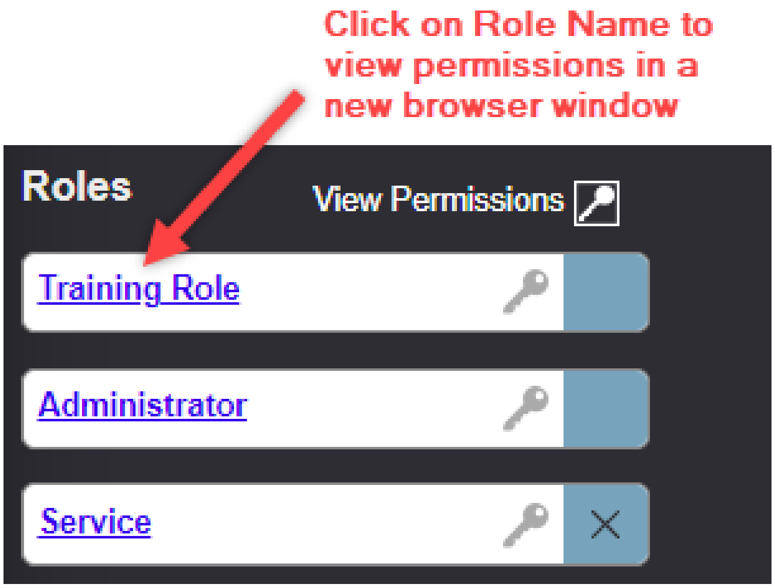


Figure 21-13. Click on Role Name

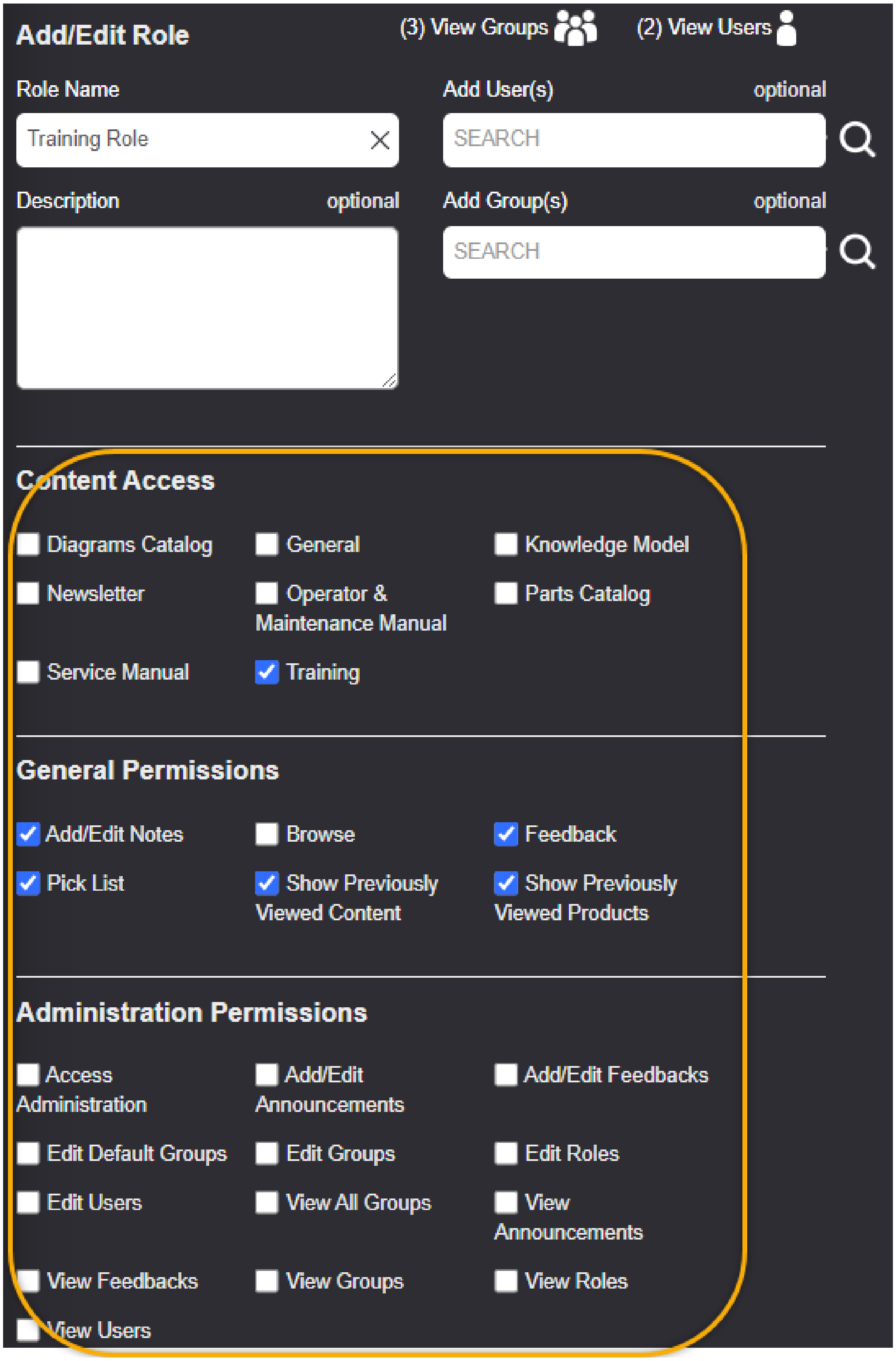


Figure 21-14. Role Permissions

6. The Training Role role is an example of one that has been inherited. Although inherited roles (and their permissions) cannot be removed from a user record directly, they can be removed by removing the group assigned to the user record.

7. Conversely, the Service Role is an example of one that was assigned by the Administrator because it has an X in the square area to the right of the role name. The role and its permissions can be removed from the user record by clicking on the X.

Content Families

Content families refer to the types of content available for viewing and searching in the ONeSOURCE Client. They are also called content permissions because, when granted to a role assigned to a user, they permit the user access to that content. As with feature permissions, content permissions are tied to roles. Since all content permissions are allowed initially, denying access to specifc content families must be done at the role level by unchecking the box for the content family to be excluded.

There are eight different content families/permissions under User Management:

1. Diagrams Catalog
2. General
3. Knowledge Model
4. Newsletter
5. Operator & Maintenance Manual
6. Parts Catalog
7. Service Manual
8. Training

Content families/permissions are selected from the Add/Edit Role screen.

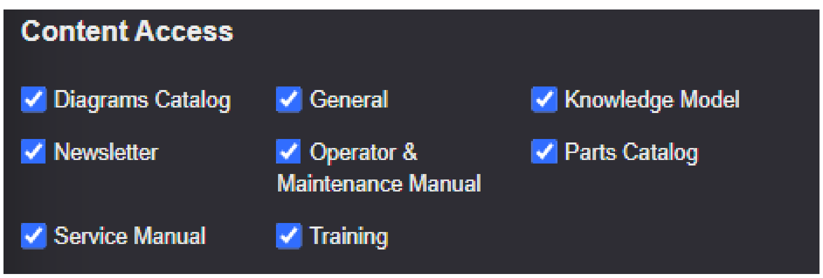


Figure 21-15. Content Family Permissions

NOTE:

a. Content access can be added or removed for a specific role by checking or unchecking the box beside the content family.
b. Refer to Adding/Editing Roles for more information on adding/editing roles.

Content families/permissions can also be viewed on the Add/Edit User screen along with other effective permissions.

Inherited Applicability

User or Group Effective Applicability is based upon the applicability type values that have already been selected. This is achieved either by direct selection or by inherited selection. Direct selection is done by the Administrator actively selecting an applicability and assigning it to a user or group. Inherited selection refers to a user or group receiving or "inheriting" the same applicabilities that are assigned to a group. This is accomplished by the Administrator assigning the group to a user or child group account but not making any explicit changes to the applicabilities that come with them. In this case, the user inherits the applicabilities of the assigned group.

The following screenshots illustrate how inherited applicability works for a User.

Here is the user record for Joe User of ABC Company.

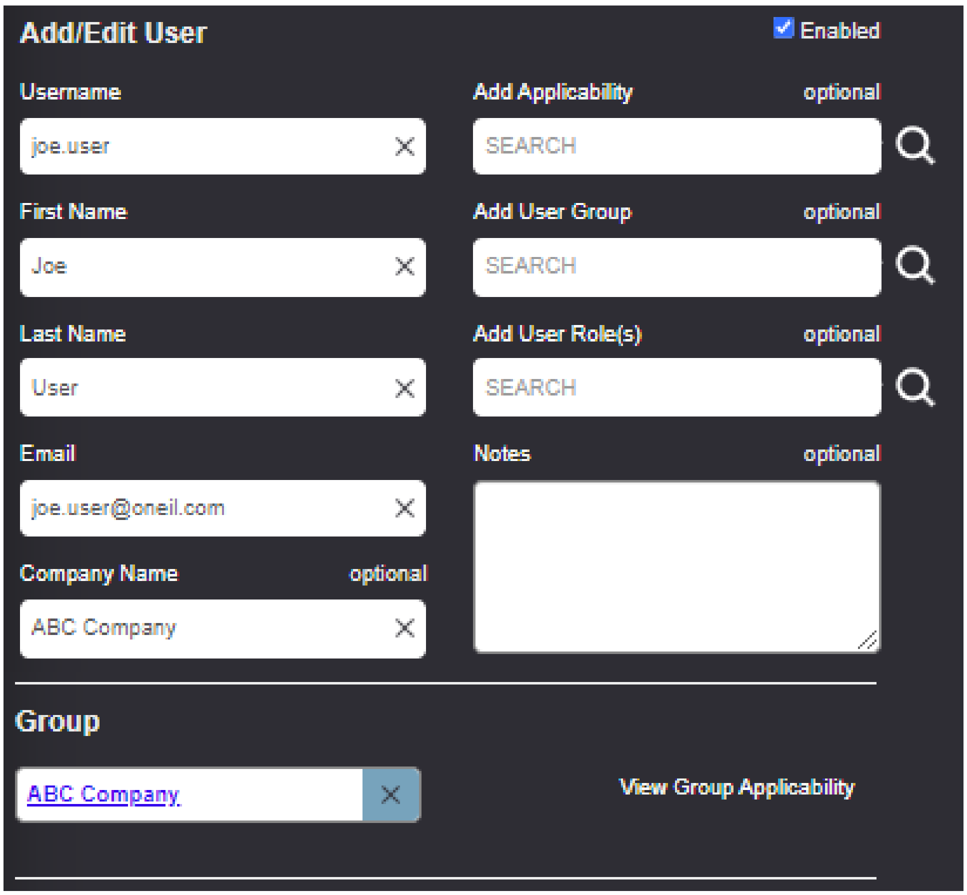


Figure 21-16. Sample User Record

NOTE: Some of the fields have been omitted in this example in order to save space.

This user is assigned to the ABC Company group. By clicking on the "View Group Applicability" link, all of the assigned group's applicabilities are displayed to the right of the user information.

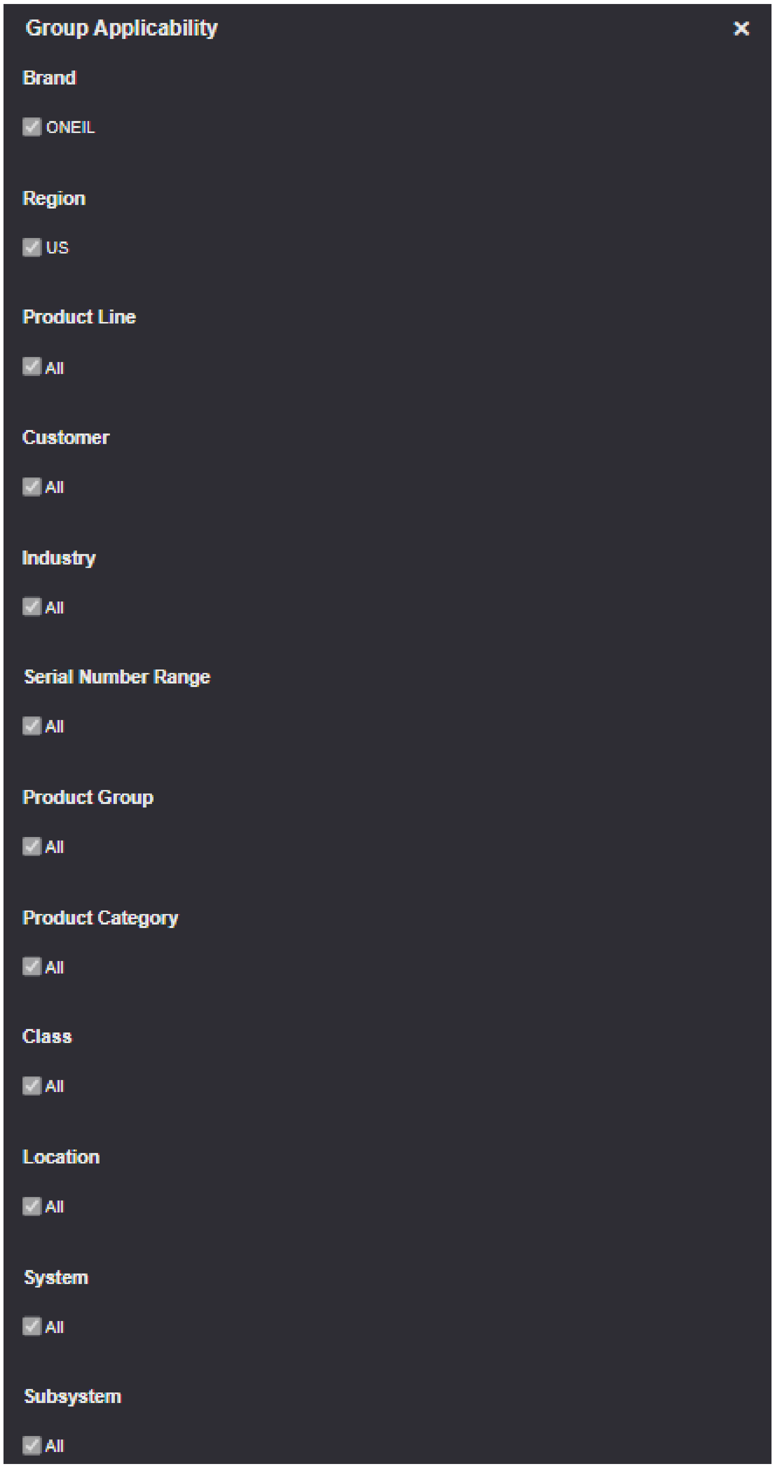


Figure 21-17. Sample Group Applicabilities

NOTE: The list of group applicabilities can be closed by clicking the "x" at the top right of the list or by clicking anywhere on the screen that is off of list.

Immediately following the section of the user's account is the User Effective Applicability section. This section includes both explicit selections (those chosen by the Administrator) and inherited selections (those passively chosen by the Administrator by assigning a group but not making any explicit selections).

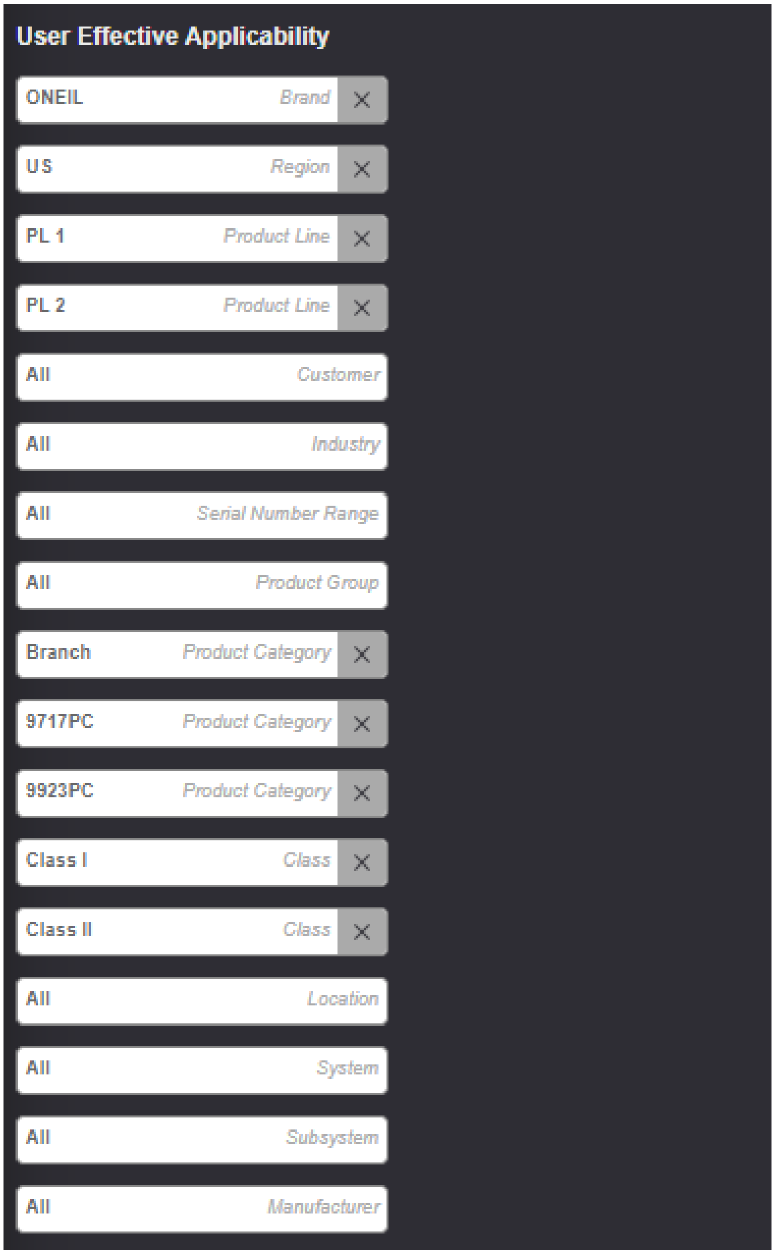


Figure 21-18. Sample User Effective Applicability

By comparing the sample group applicabilities to the sample user effective applicabilities, one notices some similarities and some differences. The group has access to all product lines, whereas the user has access to the PL1 and PL2 product lines only. The user also has access to some of the applicabilities for Product Category and Class but not all of the ones assigned to the group. Conversely, the "All" value shown in the other applicability fields means the Administrator has not explicitly selected specific applicabilities for the user, so the user inherits all of these applicabilities from the assigned group.

Group Records

Inherited applicability in child group records works the same way it does for user records. In user records, the applicabilities in the assigned group will be inherited unless the Administrator performs an action to limit which applicabilities are assigned. In child group records, applicabilities in the parent group, if one exists, will be inherited unless the Administrator performs an action to limit which applicabilities are assigned.

Here is a sample Group record.

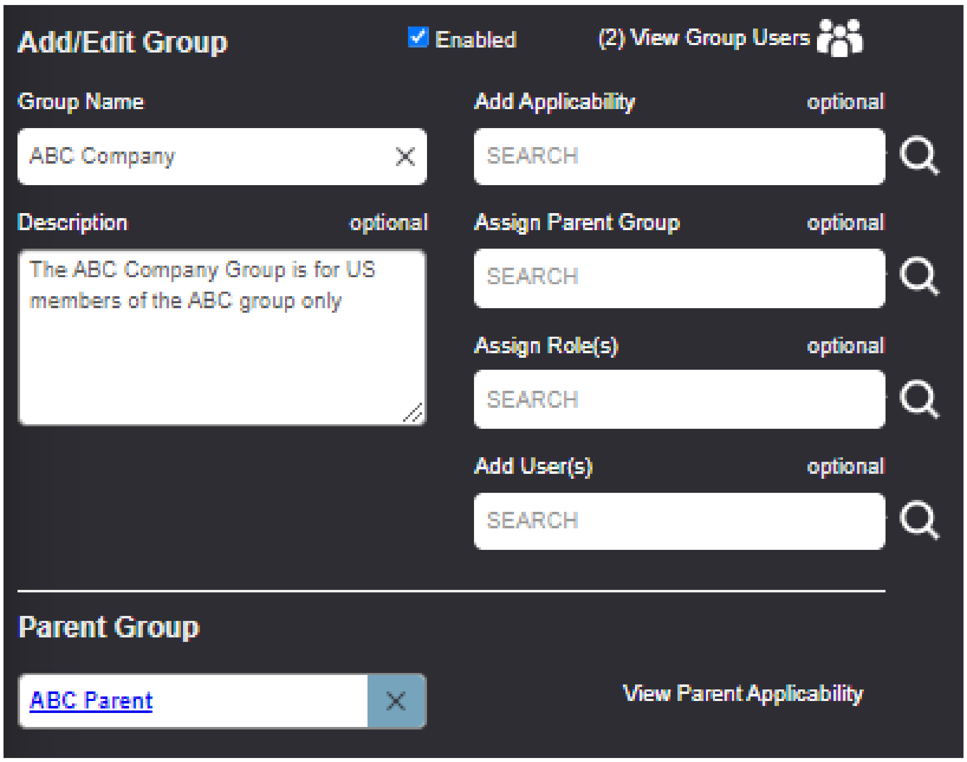


Figure 21-19. Sample Group Record

NOTE: Some of the fields have been omitted in this example in order to save space.

This group is assigned to the ABC Parent group. By clicking the "View Parent Applicability" link, all the assigned parent group's applicabilities are displayed to the right of the user information.

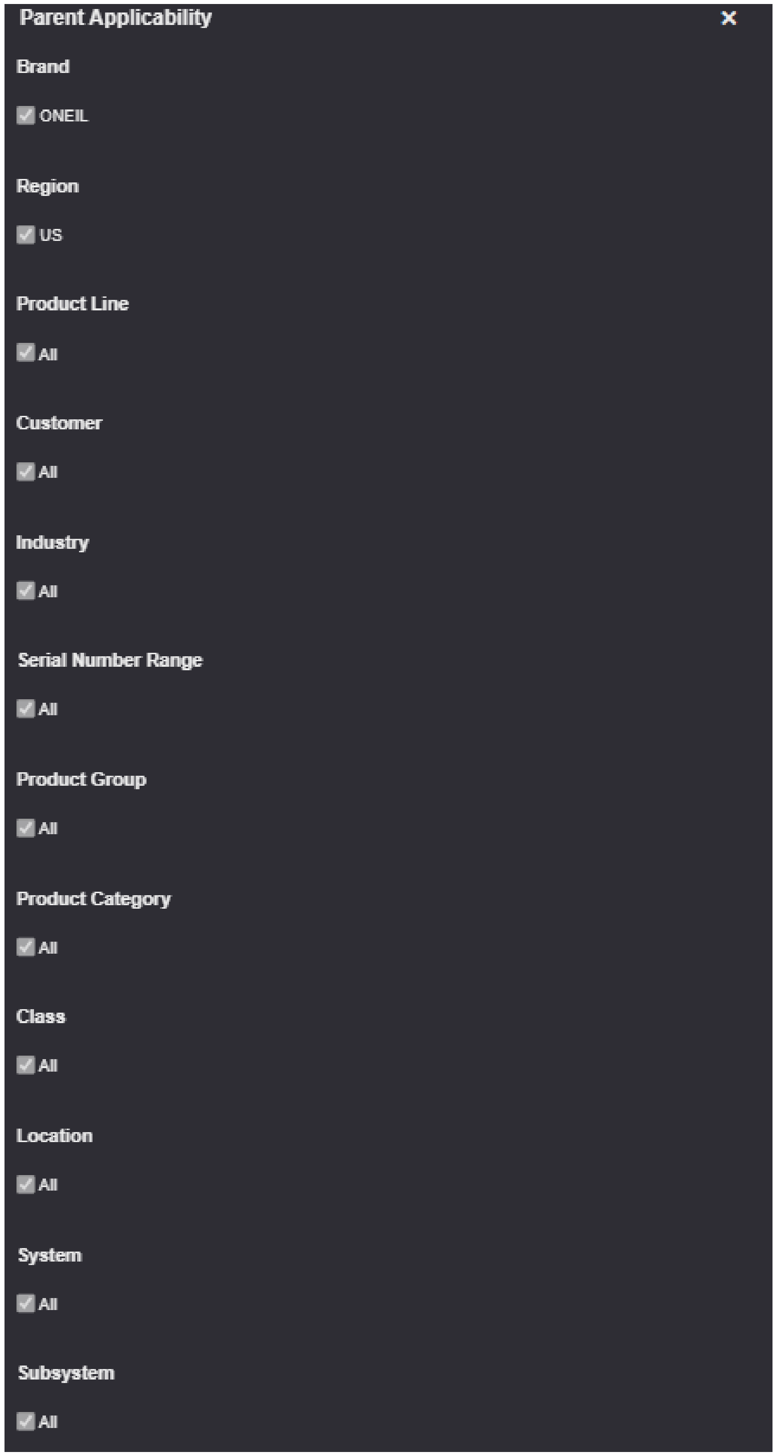


Figure 21-20. Sample Parent Group Applicabilities

NOTE: The list of parent group applicabilities can be closed by clicking on the "x" at the top right of the list or by clicking anywhere on the screen that is off of list.

Immediately following the section of the Parent Group section of the child group account is the Group Effective Applicability section. This section includes both explicit selections (those chosen by the

Administrator) and inherited selections (those passively chosen by the Administrator by assigning a group but not making any explicit selections).

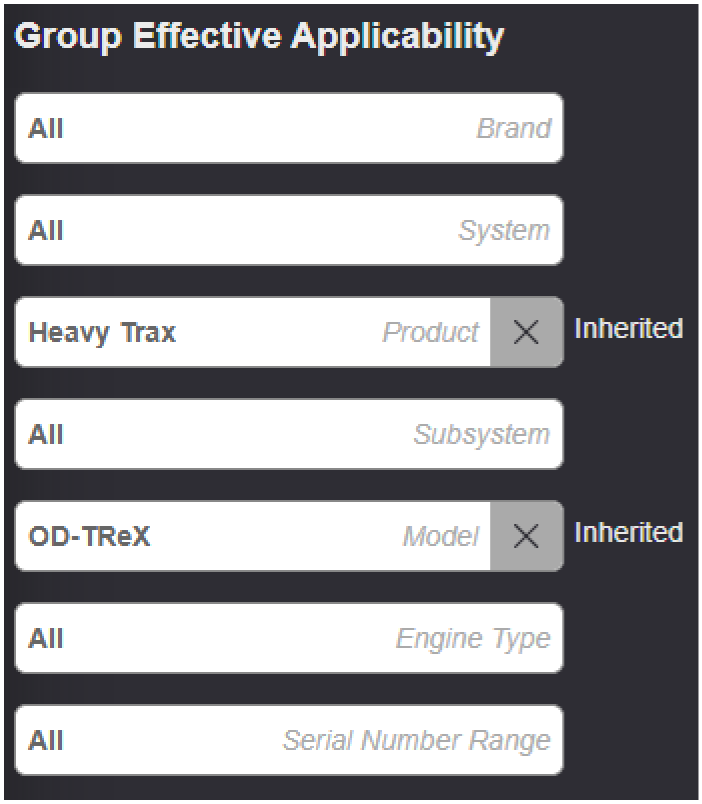


Figure 21-21. Group Effective Applicability

By comparing the applicabilities assigned to the child group and the parent group in this example, one can see they are the same. That is, the child group has inherited all of the applicabilities in the parent group. This is designated by the text "All" in each of the child group applicabilities.

By having the applicabilities displayed in this way for user and child group records, Administrators can see which applicabilities are selected versus those that are inherited.

Users

Adding/Editing Users

1. Click the Administration tab.

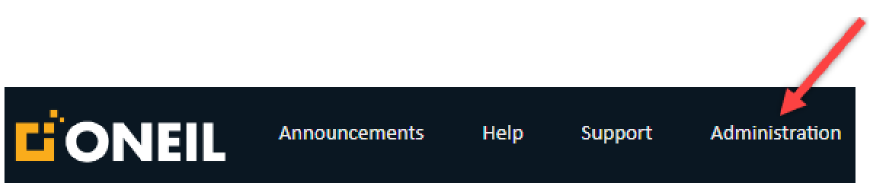


Figure 21-22. Administration Tab

2. Select Users.

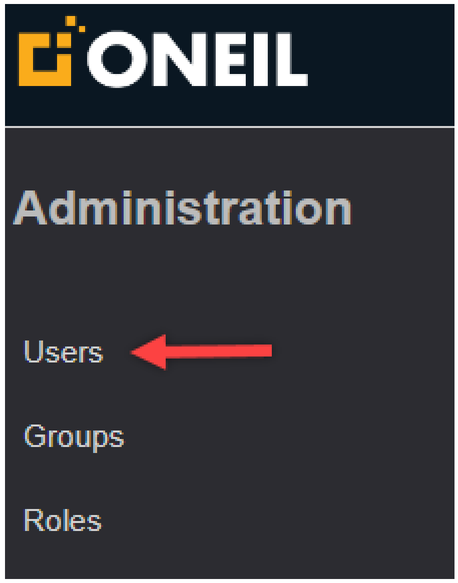


Figure 21-23. Users Option

3. Click Add User.

Figure 21-24. Add User Icon

Add User Information

Below is the list of Add/Edit User fields.

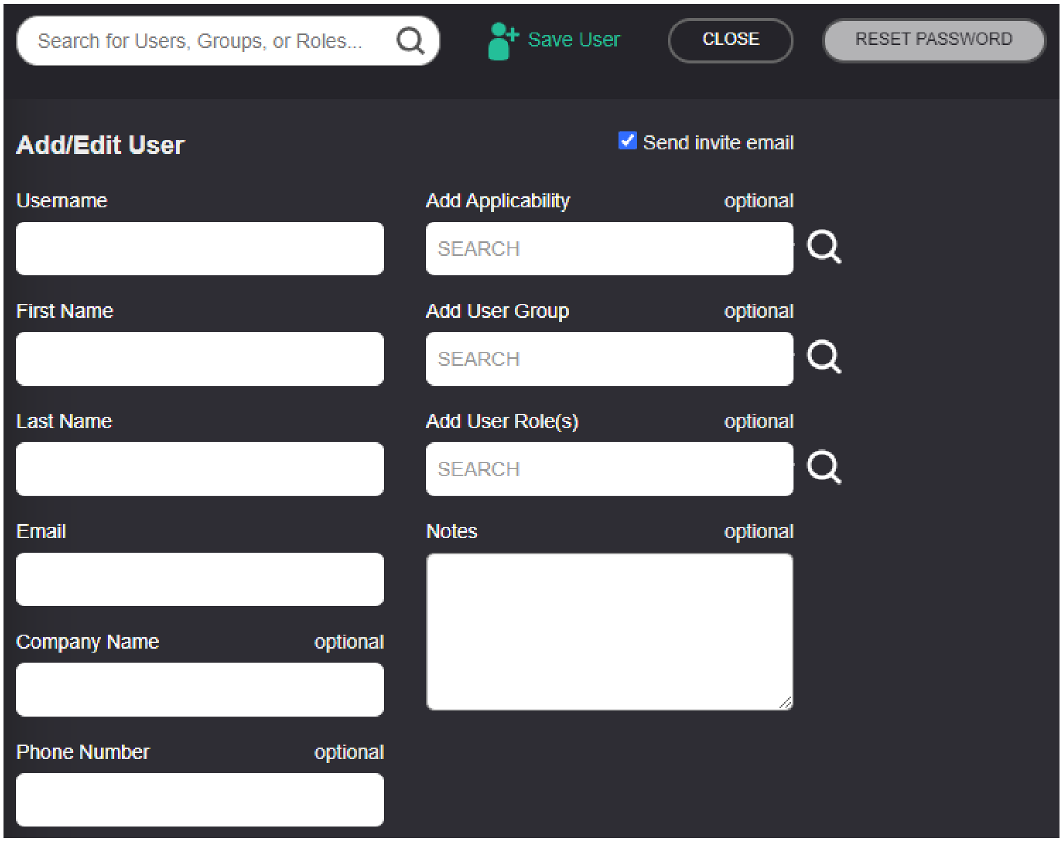


Figure 21-25. Add/Edit User Screen

4. Enter a Username/Login ID (required).

   Usernames may contain: any letter (upper or lowercase), any digit, or any of the following characters (hyphen [-], period [.], underscore [_], at symbol [@], or plus sign [+]).

   Maximum length for usernames is 50 characters.

   Usernames for a specific content provider (an ONEIL external customer) must be unique.

5. Enter information for the remaining required fields.

- First Name - 1-30 characters
- Last Name - 1-30 characters
- Email - must contain the at symbol (@), at least one character, a period, and at least two characters; maximum length is 50 characters

6. Enter information for Company Name (1-50 characters) and Phone Number (can include hyphens, parentheses, or numbers only - maximum length is 30 characters). These are both optional fields.
7. When viewing a record for an existing user, if the Enabled box is checked it means the user is active. To disable a user, uncheck this box.

Figure 21-26. Enabled Check Box

Completed Fields

Below is a sample user record showing these fields:

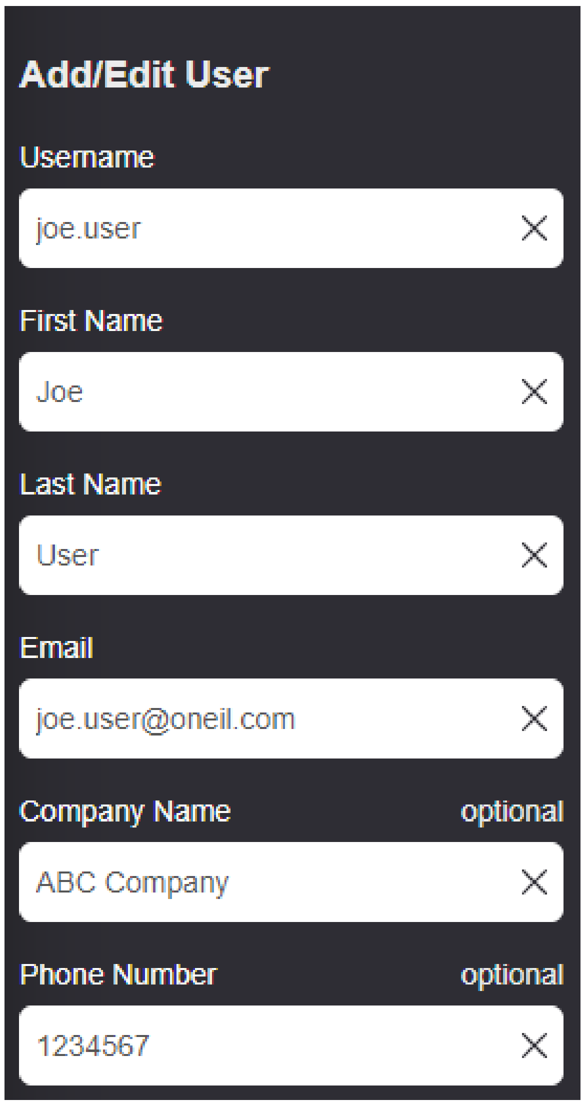


Figure 21-27. Sample User Record

8. Add Applicability (optional):

a. If a user is assigned to a group, they will inherit all the applicabilities of the group.

b. Click the magnifying glass icon to open the flyout window and display the list of applicabilities.

NOTE: If the user is not assigned to a group, all applicabilities will display. If the user is assigned to a group, only the applicabilities assigned to the group will display.

c. To restrict the user to only some applicabilities assigned to the group, click the plus sign next to the applicability.

The screenshots below illustrates how this works.

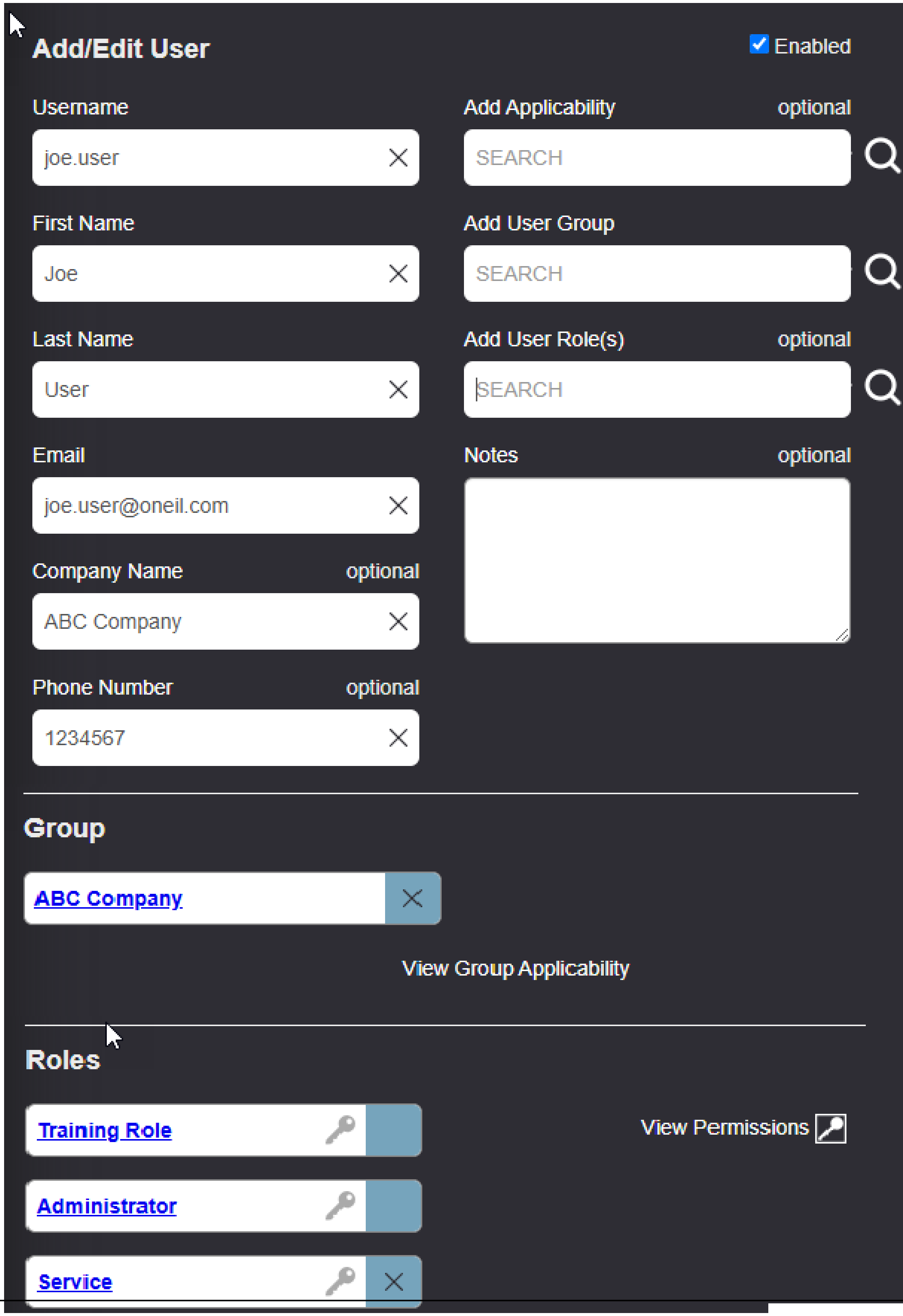


Figure 21-28. Add/Edit User Screen

In this example, the user has been assigned to the ABC Company group.

9. To restrict the user to only the ONEIL brand applicability, click the magnifying glass to the right of the Add Applicability search window.

Figure 21-29. Add Applicability

10. The Applicability window opens. Find the ONEIL brand applicability by typing "ONEIL" in the filter search window or selecting "Brand" from the drop-down menu below Type.

Figure 21-30. Find Applicability

11. Click the plus sign next to the applicability. The plus sign will change to an X to show it has been added to the user record.

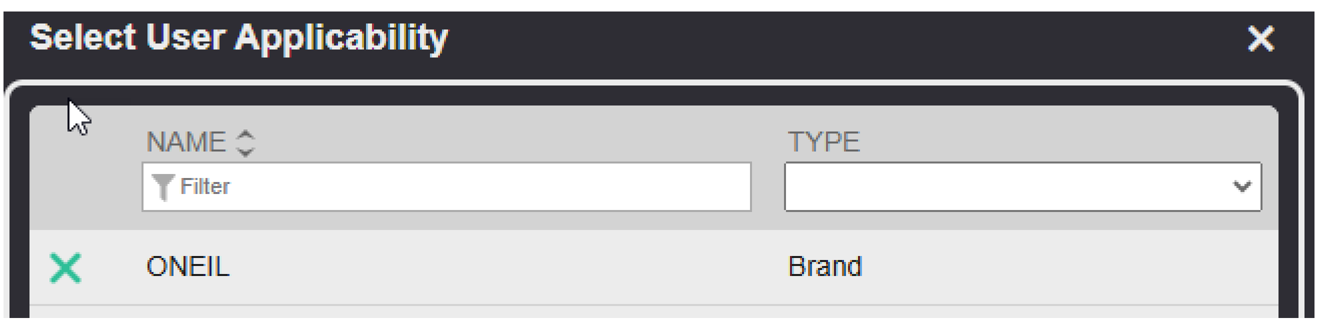


Figure 21-31. Select Applicability

12. The applicability will now display under the User Applicability section of the User record.

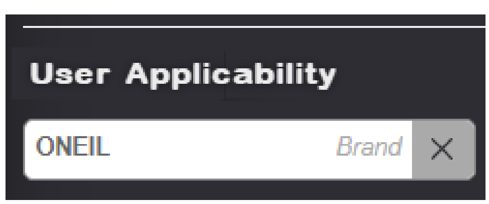


Figure 21-32. User Applicability

13. The ONEIL brand applicability now shows up under the User Applicability section of the Add/Edit User screen.

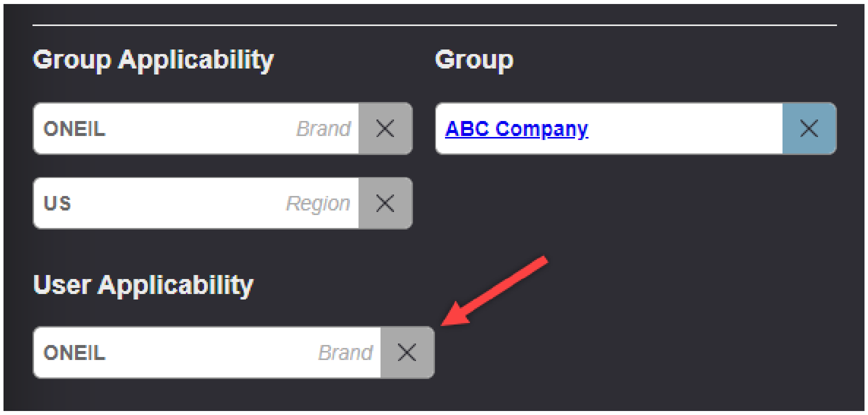


Figure 21-33. User Applicability Added

14. Add User Group (required):

a. A user can only be a member of one group.

b. A group can be a child (as part of another group) or a parent (contains another group).

c. If the group is a child group, it can only belong to one parent group.

d. If the group name is known, enter it in the search window and press Enter.

Figure 21-34. Add User Group Field

15. Alternatively, click on the magnifying glass icon to open the flyout window and display the list of available groups.

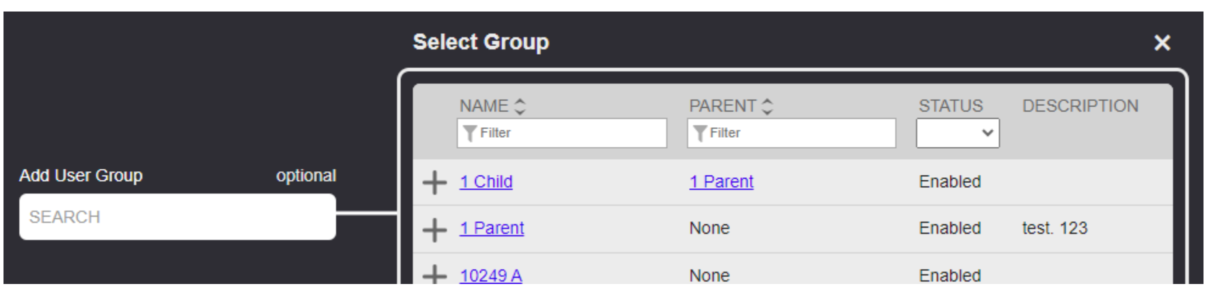


Figure 21-35. Select Group Flyout

a. Locate the group by going through the list of groups or by entering the name of the group in the name filter window. To add the user to a group, click the **+** sign next to the group. After clicking the **+** sign, it will change to an **X**.

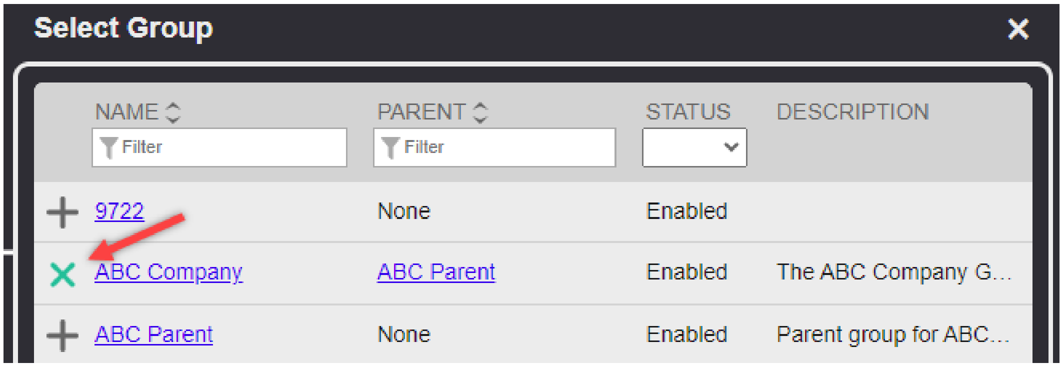


Figure 21-36. Group After Selected

b. When the flyout window is closed either by clicking the **x** in the upper right corner of the **Select Group** window or by clicking on a blank area of the screen, the group will display under the **Group** header at the bottom of the **Add/Edit User** screen.

Figure 21-37. Assigned Groups

NOTE: The assigned group displays as a clickable link that, when clicked, will open the group record in a new browser tab for the Administrator to review the group without having to leave the user record they are working in.

Add User Roles (optional)

16. If the name of the role is known, enter it in the search window and press Enter.

Figure 21-38. Add Roles Field

A user must have at least one role assigned. Roles may be assigned to users by an Administrator or may be inherited from the assigned parent group.

17. Alternatively, click the magnifying glass icon to open the flyout window and display the list of available roles.

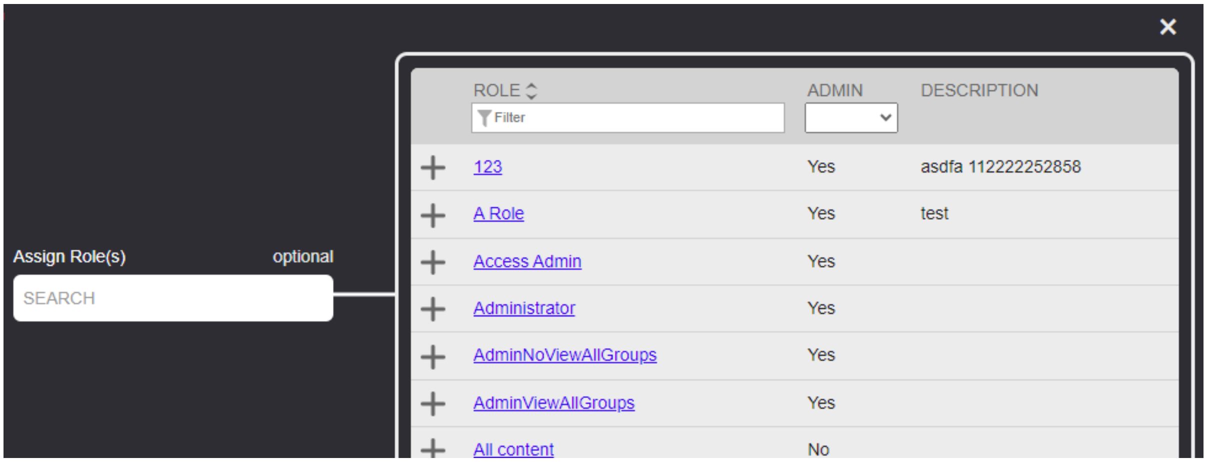


Figure 21-39. Roles Flyout

18. Locate the role by going through the list of roles or by entering the name of the role in the Role Filter window.
19. To assign a role to a user, click the + sign next to the role. After clicking the + sign, it will change to an X.

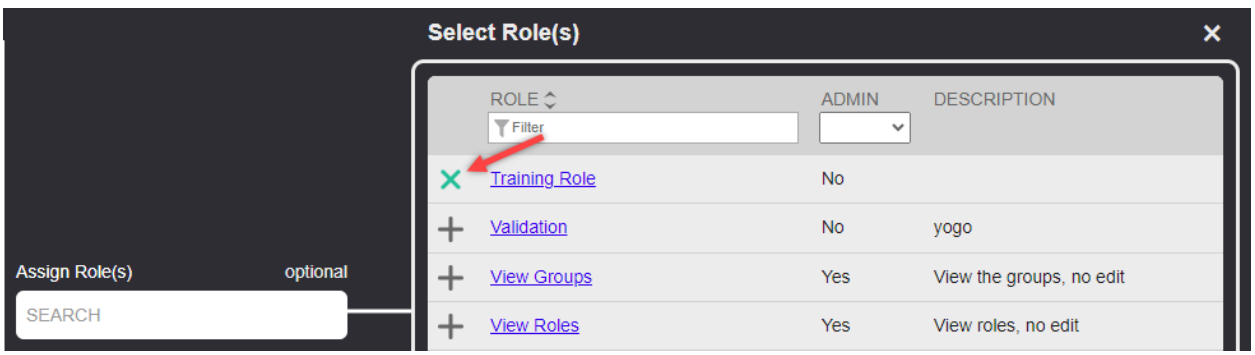


Figure 21-40. Roles After Selection

20. When the flyout window is closed either by clicking the x in the upper right corner of the Select Role(s) window or by clicking on a blank area of the screen, the role will display under the Roles header at the bottom of the Add/Edit User screen.

Figure 21-41. Assigned Roles

NOTE: The assigned role displays as a clickable link that, when clicked, will open the role record in a new browser tab for the Administrator to review the role without having to leave the user record they are working in.

21. To view the permissions associated with a specific role, click the link for that role. The role will open in a new browser tab and will display the permissions associated to it.
22. To view permissions associated to all assigned roles, if more than one role exists, click the View Permissions icon to display a combined list of permissions.

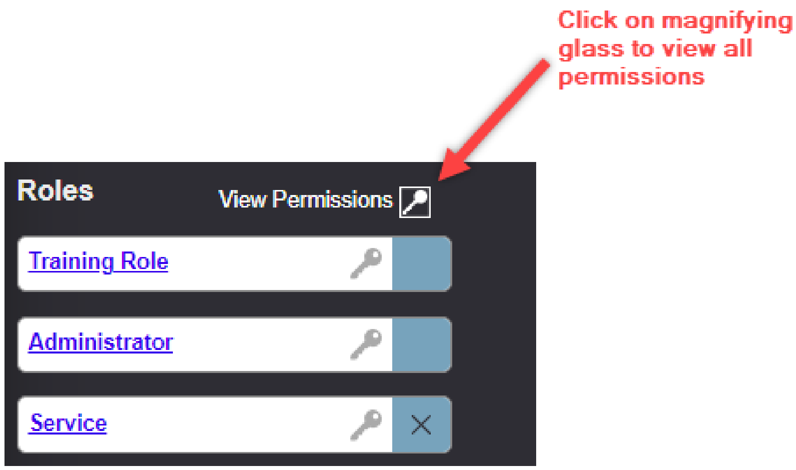


Figure 21-42. View Permissions Icon

A list of permissions will display at the top of the **Add/Edit User** screen.

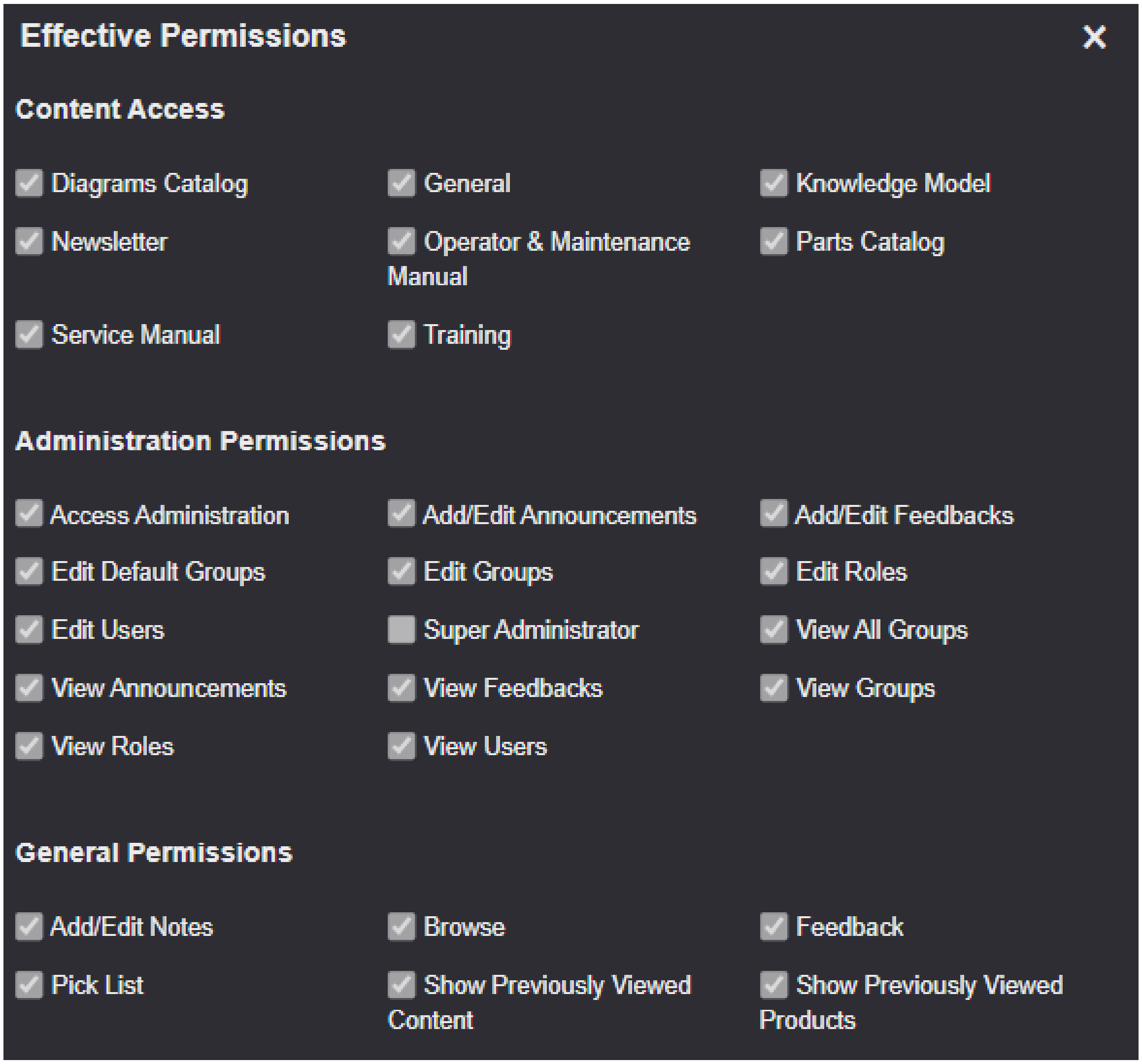


Figure 21-43. View All Permissions

23. Enter text in the Notes field (optional).

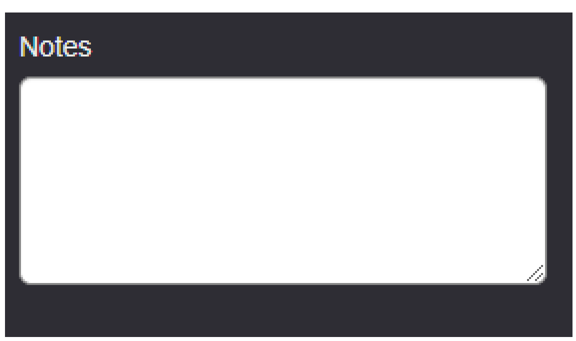


Figure 21-44. Notes Field

NOTE: The Notes field is intended for internal use between administrators. Notes will not appear in the ONeSOURCE Client. If you want to expand the size of the Notes text box, click and drag the bottom right corner to the desired size.

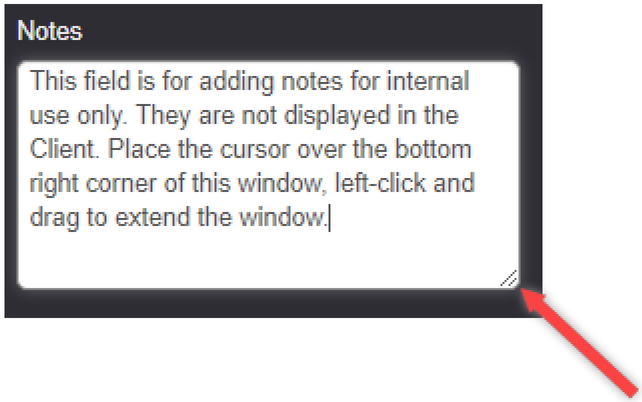


Figure 21-45. Resizing the Notes Field

Saving User Information and Exiting

24. Click the **Save User** icon to save additions/edits. It is recommended to save work often as the session will time out after 30 minutes.

Figure 21-46. Save User Icon

25. Click the **Close** button to exit the **Add/Edit User** screen.

Figure 21-47. Close Button

Managing All Users

A list of all users is displayed when the Users option is selected under Administration.

1. Click on the **Administration** tab.

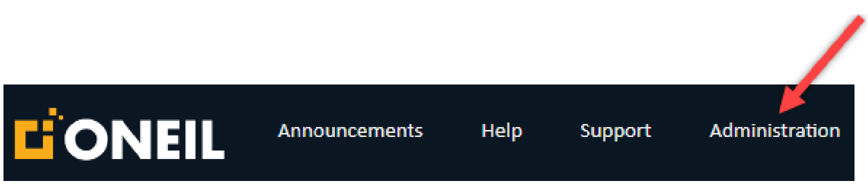


Figure 21-48. Administration Tab

2. Select **Users**.

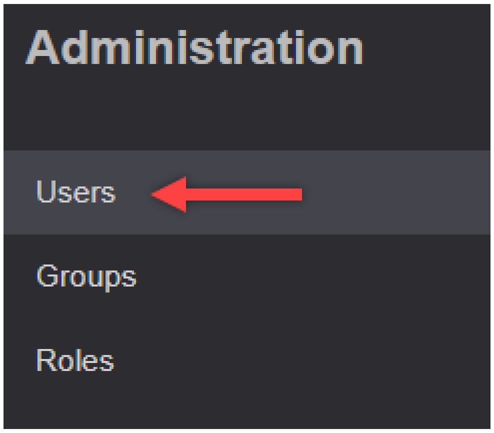


Figure 21-49. Users Tab

The list of all users is displayed.

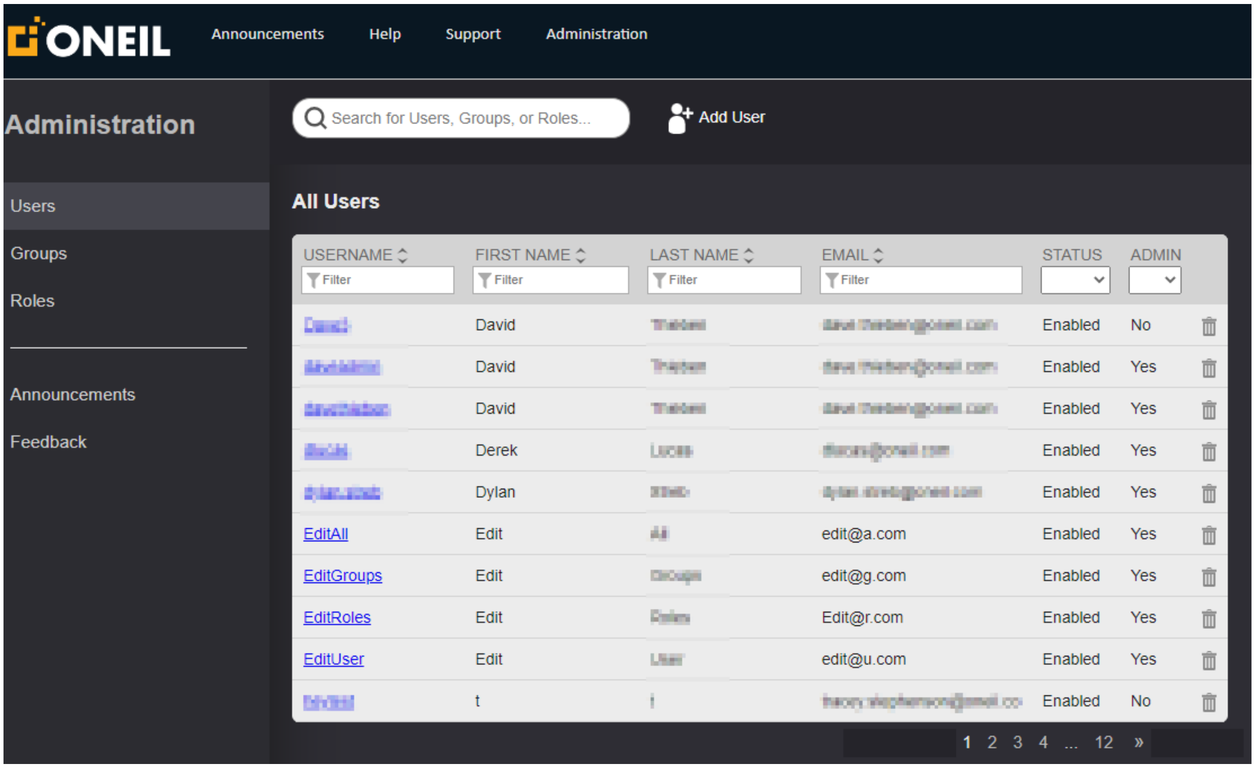


Figure 21-50. List of Users

NOTE:

a. Each page lists 10 user names. If there are more than 10 user names, use the page numbers or arrows displayed at the bottom of each page to go to other pages.

b. If text in the All Users list is longer than the width of its column, the entry will appear truncated followed by an ellipsis. To view the full text, hover the mouse over the entry.

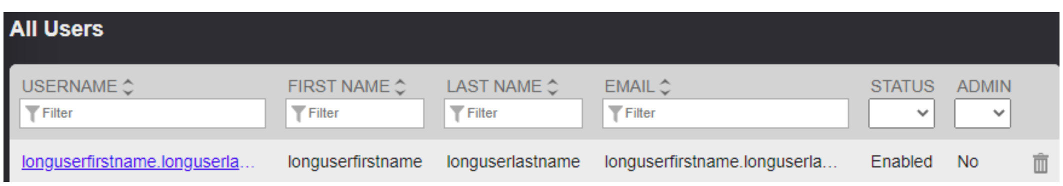


Figure 21-51. Example of Long User Name

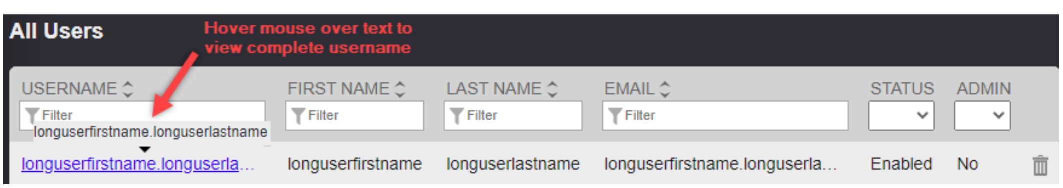


Figure 21-52. Example of Long User Name (Continued)

3. To sort the list of users in ascending or descending order, click anywhere in the column header for USERNAME, FIRST NAME, LAST NAME, or E-MAIL ADDRESS.

Figure 21-53. Column Headers

NOTE:

a. The default display order is *ascending by USERNAME*.

b. Each click on a column header changes the sort order between ascending or descending for that column.

4. To filter the users list, type the search criteria in any of the four filter fields. The search performed is a "starts with" search as opposed to a "contains" search, meaning the system will look for the search string at the beginning of the content and not in the middle of the content.

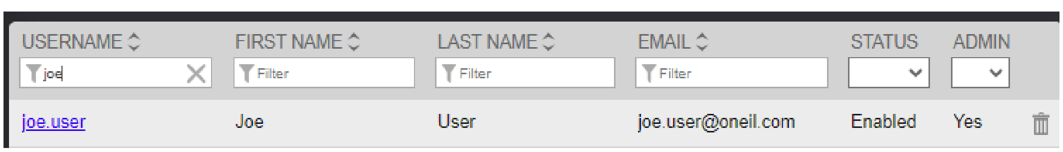


Figure 21-54. User Filters

NOTE:

a. The name "joe" has been entered in the USERNAME field to filter the list of users to content that matches.

b. Clear text entered in a field by clicking on the X in the field.

5. To filter results by account status or by administrative status, use the drop-down boxes to select the desired value.

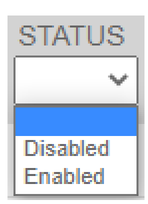


Figure 21-55. Status Drop-Down List

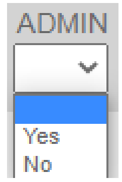


Figure 21-56. Admin Drop-Down List

6. To view a specific user record from the list of all users, click on a username to open the add/edit user page.

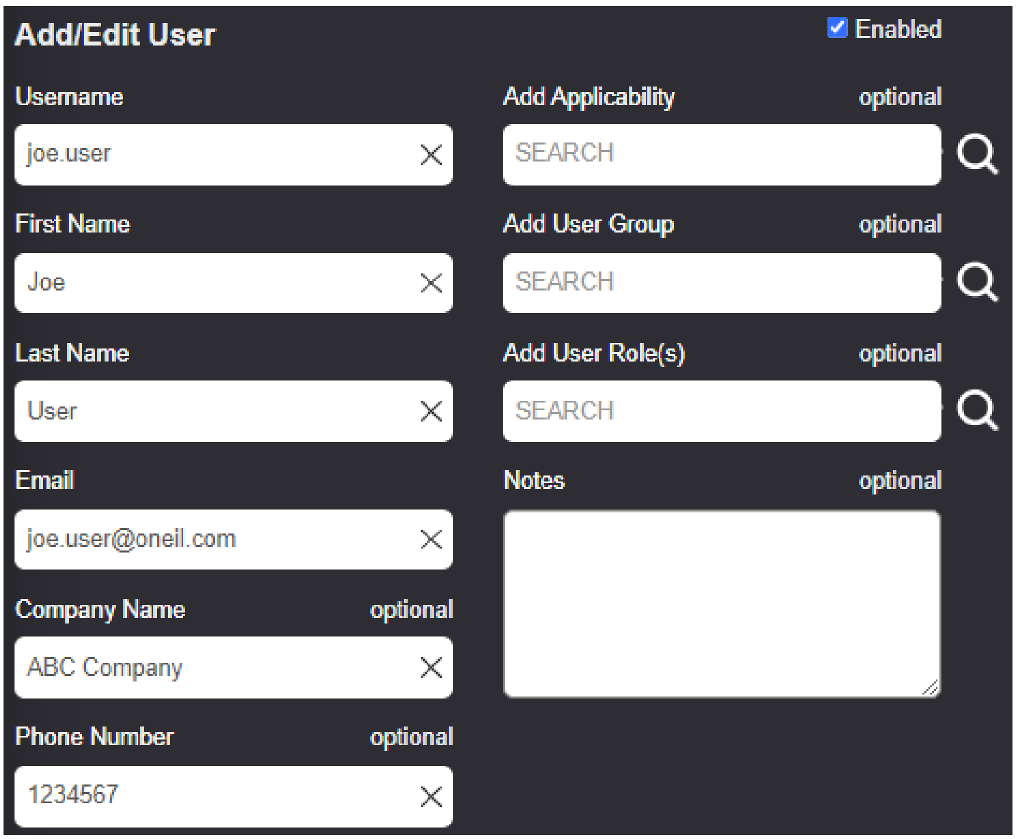


Figure 21-57. Add/Edit User Page

NOTE: Administrators cannot edit their own user records, although Super Administrators can.

7. Click the Close button to return to the list of all users.
8. To delete/remove a user from the all users list, click on the trash can icon on the right.
9. A pop-up message will display. Click Yes to confirm the deletion.

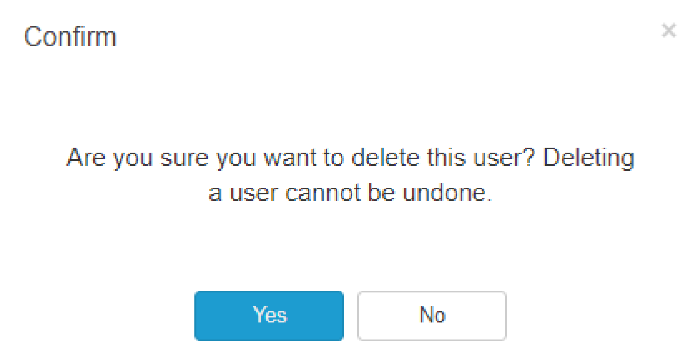


Figure 21-58. Confirm Delete Pop-Up Message

Groups

Adding/Editing Groups

1. Click on the Administration tab.

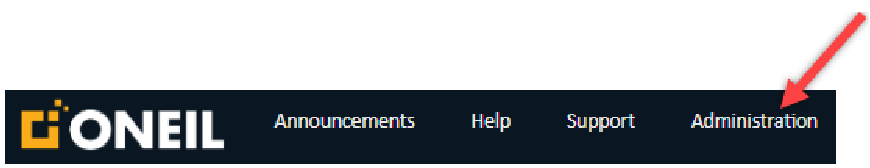


Figure 21-59. Administration Tab

2. Select Groups.

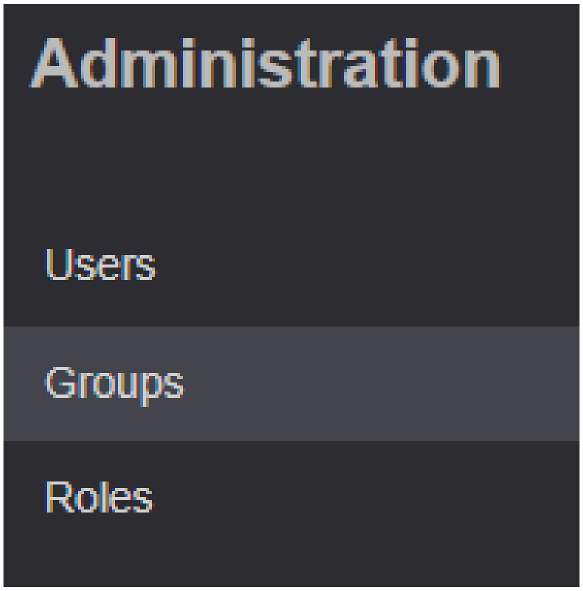


Figure 21-60. Group Option

3. Click on Add Group.

Figure 21-61. Add Group Icon

4. The Add/Edit Group page displays.

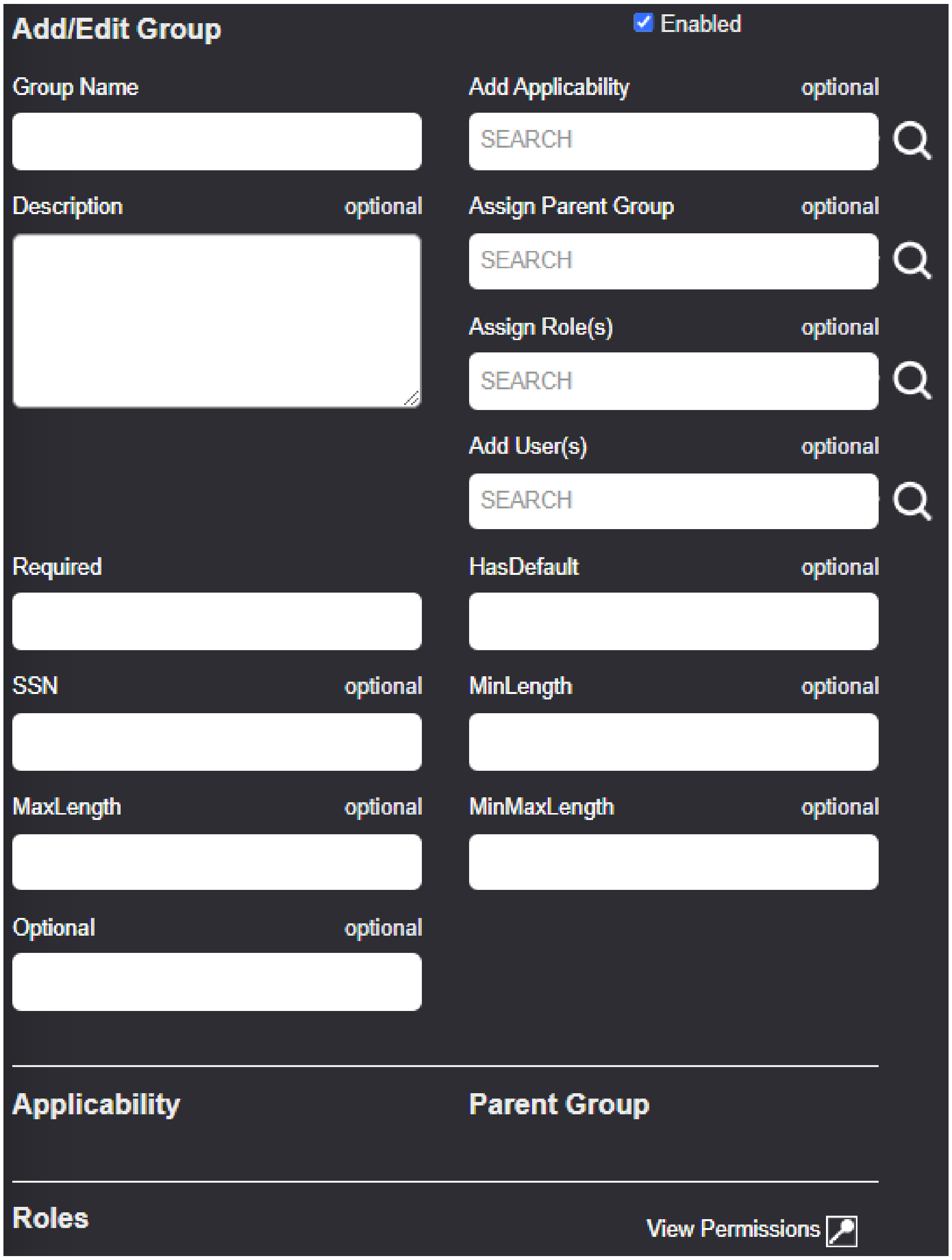


Figure 21-62. Add/Edit Group Screen

5. Enter a name for the group in the Group Name field (required).

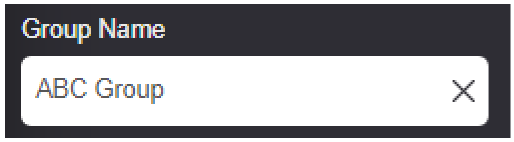


Figure 21-63. Group Name

NOTE:

a. Maximum length for group names is 50 characters.
b. Group names must be unique for each customer.

6. Enter a description for the group in the Description field (optional).

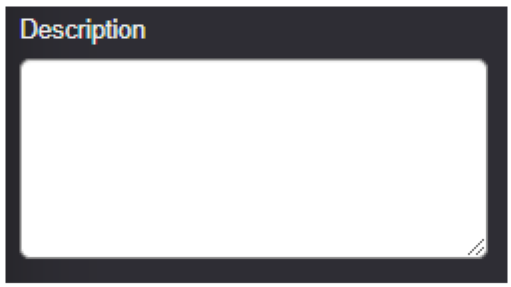


Figure 21-64. Description Field

The Description field is similar to the Notes field on the Add/Edit Users screen. The Description text box can be expanded by clicking and dragging the right corner of the text box. It can be used to describe the users that comprise the group, their activities, etc.

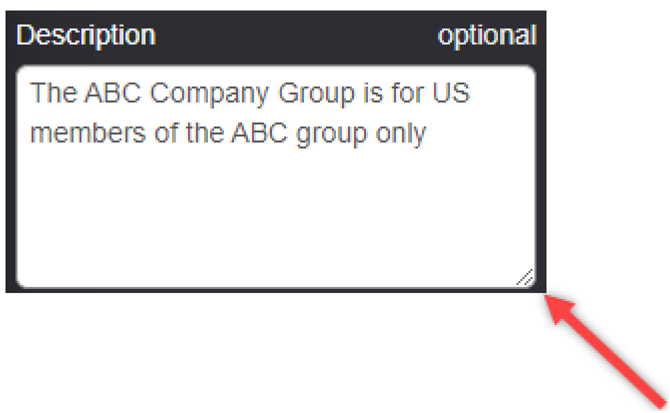
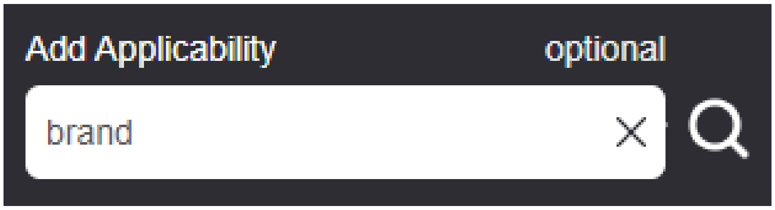


Figure 21-65. Resizing the Description Field

Assign an applicability.

7. A group within user management can have more than one applicability. There are multiple ways of assigning applicability to a group:
   a. Enter the name or type of the desired applicability in the Add Applicability field, if known, and press Enter (or click the Magnifying Glass Icon).



NOTE: The text "brand" has been entered in the Add Applicability window.

Figure 21-66. Add Applicability

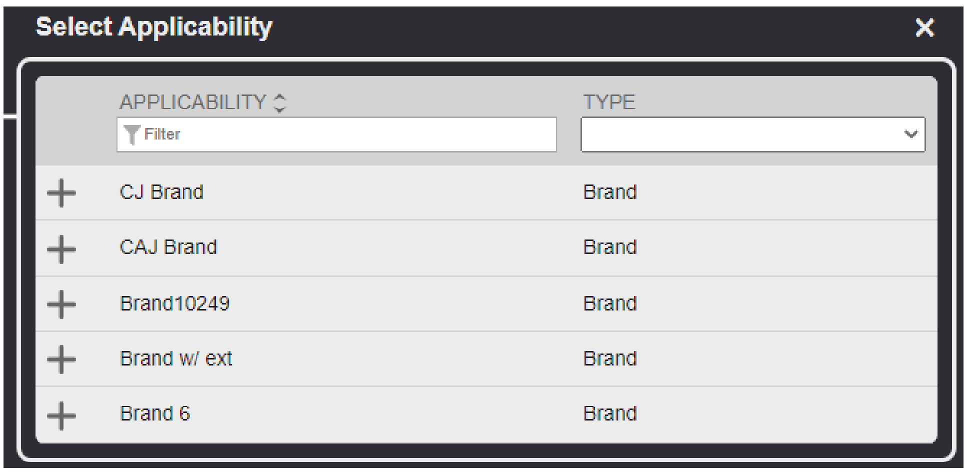


Figure 21-67. Filtered Applicability

b. Alternatively, leave the Add Applicability window blank and click on the magnifying glass icon to open the list of available applicabilities.

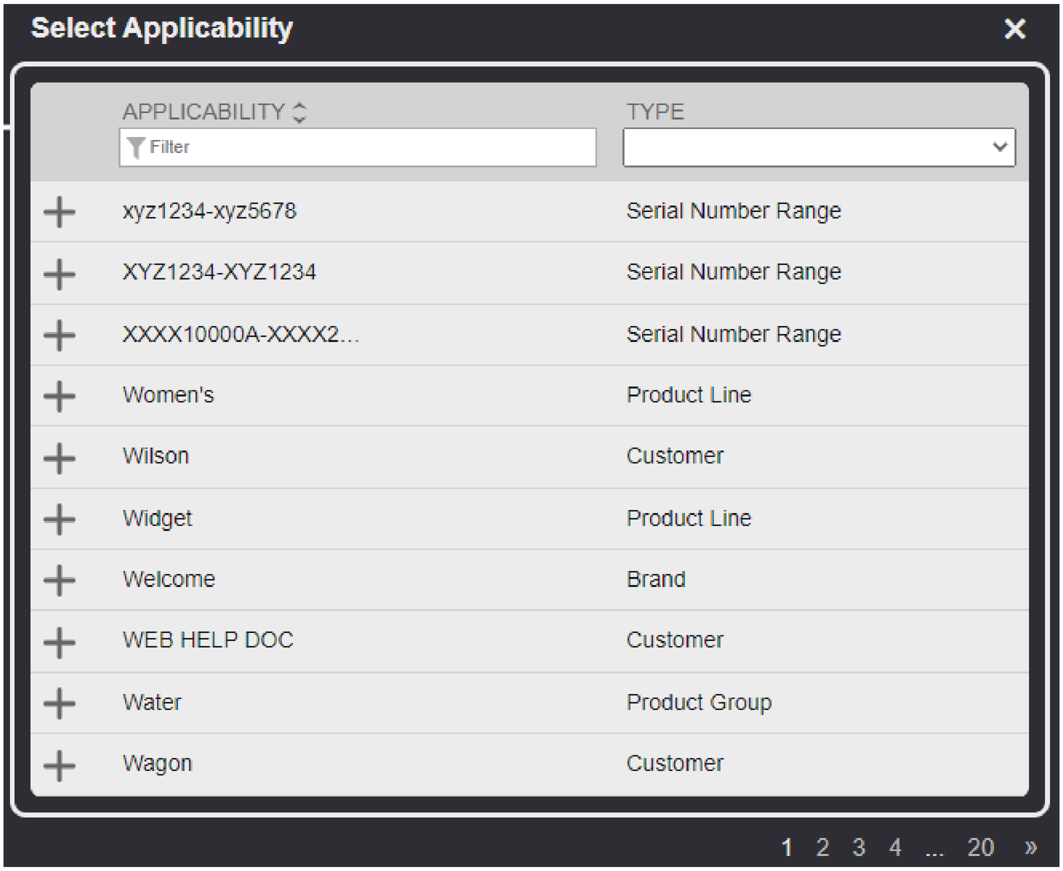


Figure 21-68. All Applicabilities

NOTE:

a. Each applicability page can display up to 10 items. If there are more than 10 items total, use the page numbers or arrows displayed below each page to navigate to other pages.

b. Use the up or down arrows beside the APPLICABILITY header to display the items in the list in ascending or descending alphabetical order.

c. Yet another option for selecting the desired applicability is to use the TYPE drop-down list to filter the list of available choices.

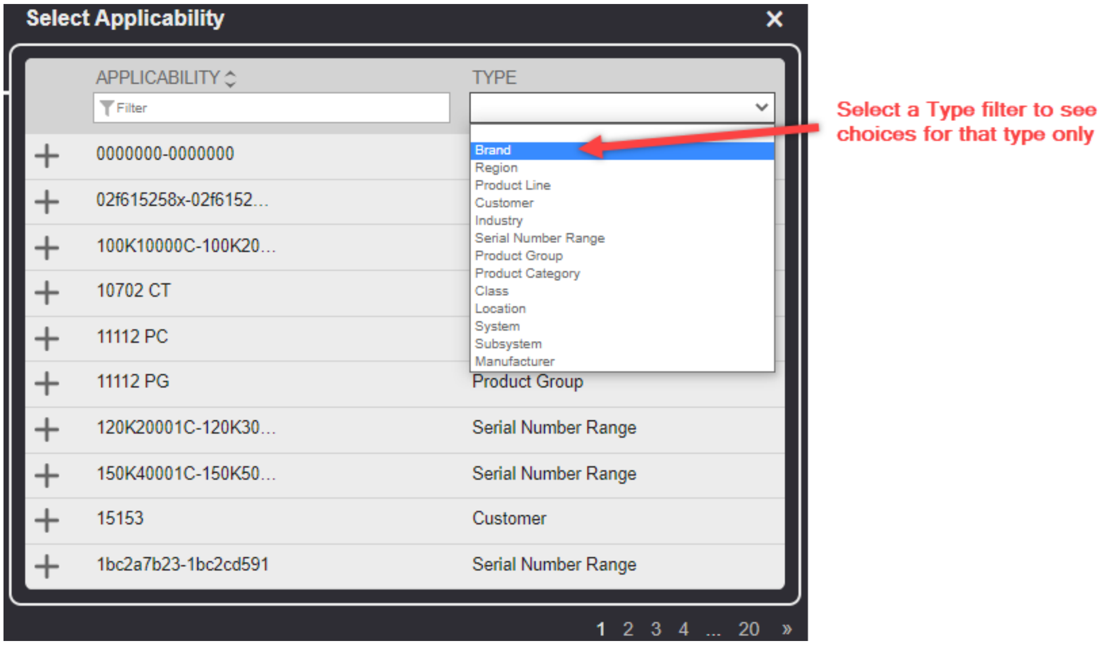


Figure 21-69. Type Drop-Down List

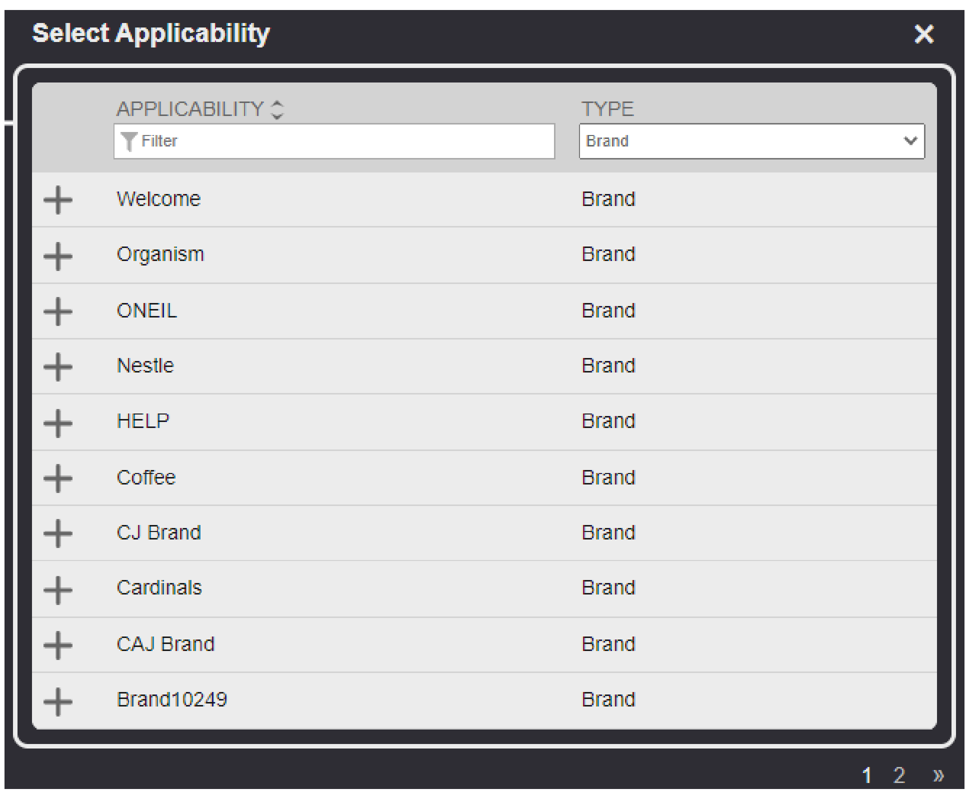


Figure 21-70. Filtered Applicabilities by Brand

d. Click on the plus sign beside an applicability to add it. More than one applicability can be seleced.

e. After clicking on a plus sign, it will change to an X.

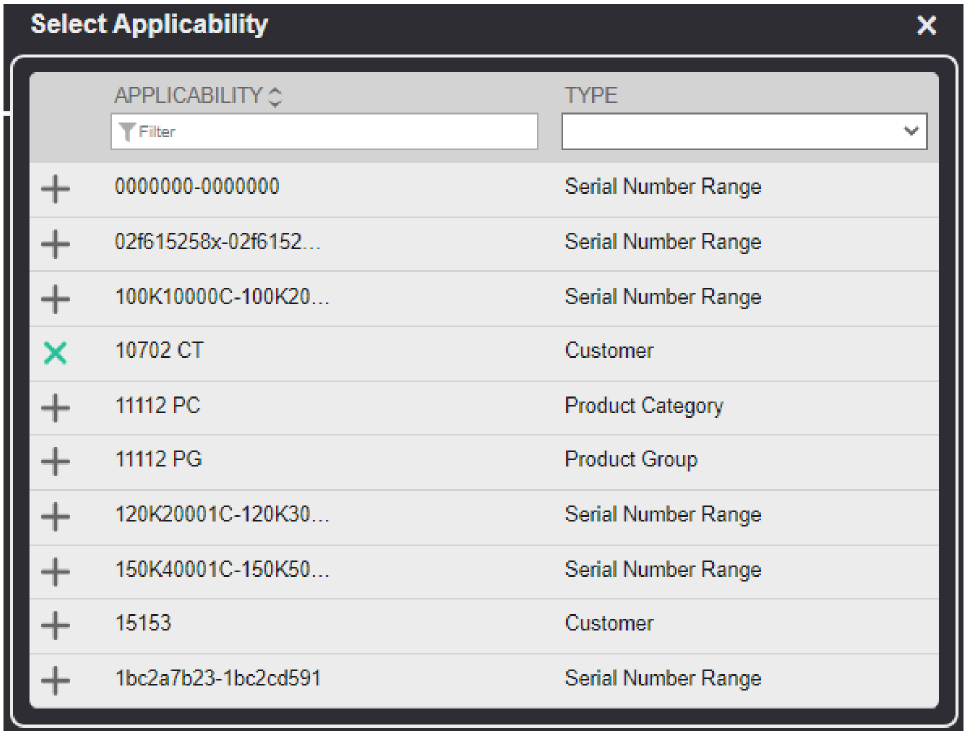


Figure 21-71. Selected Applicability

8. After selecting applicabilites and closing the Select Applicability window (by clicking the x in the upper right corner of the window or by clicking a blank area of the screen), the selected applicabilities will display under Applicability at the bottom of the Add/Edit Group page.

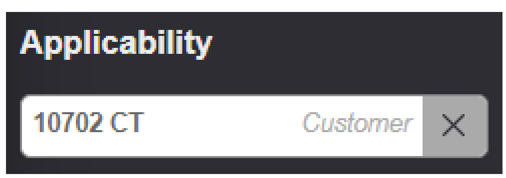


Figure 21-72. Applicability

Assign a parent group.

9. A child group can only belong to one parent group, and a parent group can only have one child group.
   a. If the name of the parent group is known, enter it in the search window and press Enter or click the Magnifying Glass icon.

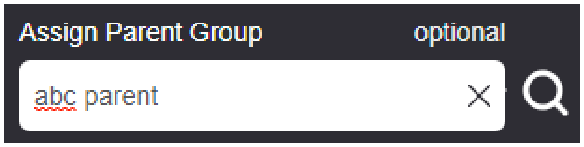


Figure 21-73. Assign Parent Group

NOTE: The text "abc parent" has been entered.

The Select Group window will open and show all groups, both child and parent, that satisfy the search term.

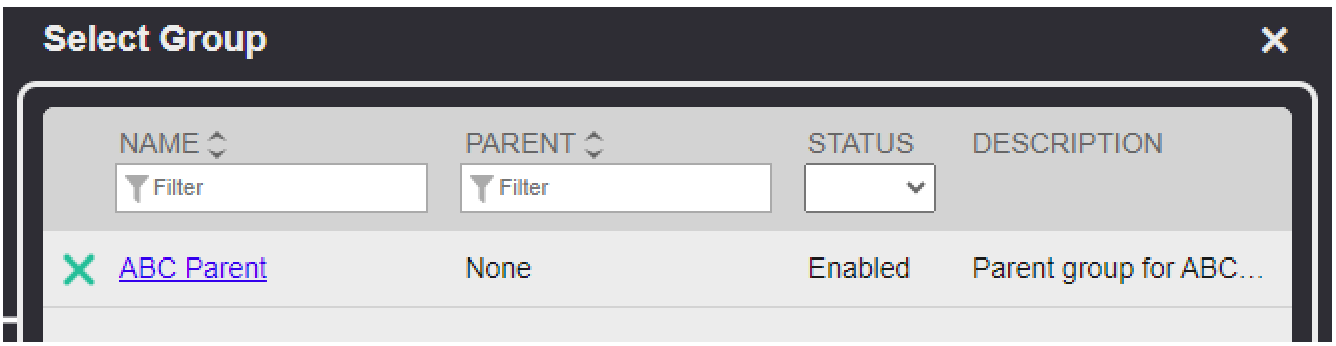


Figure 21-74. Select Group

b. Alternatively, click the Magnifying Glass icon without entering any text in the Assign Parent Group field to open the flyout window to display all available groups.

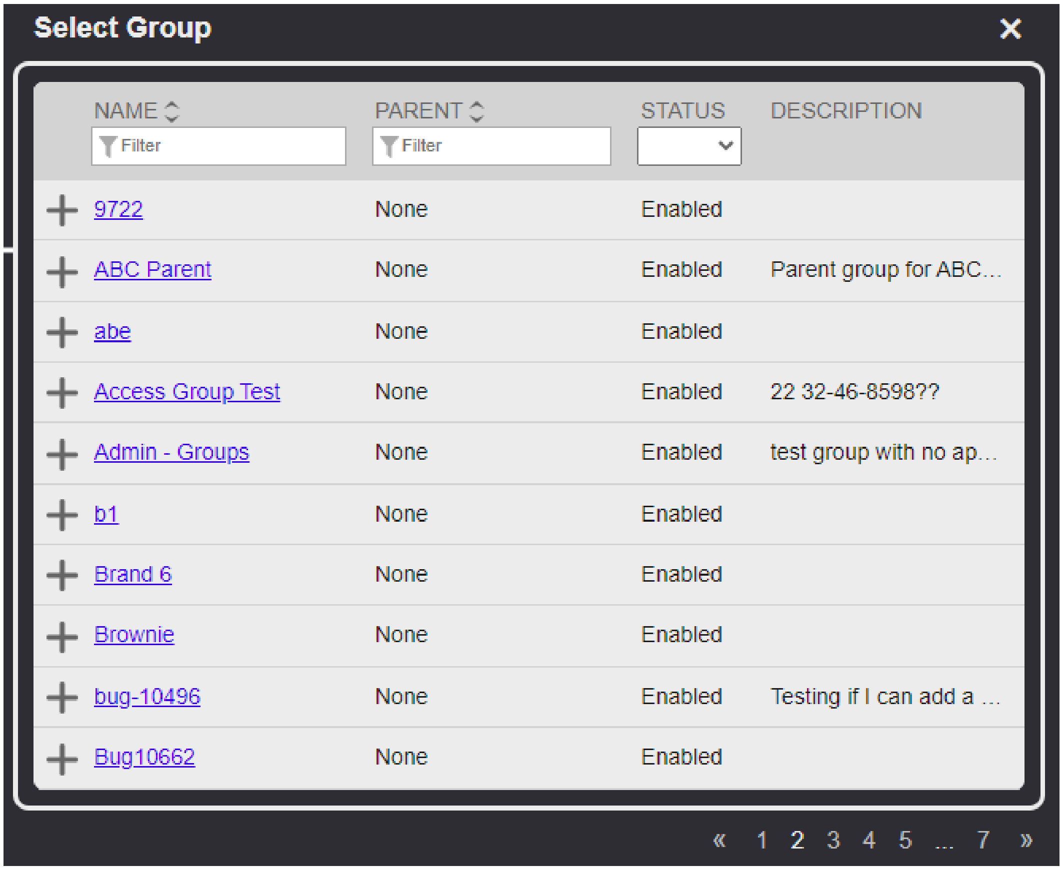


Figure 21-75. All Groups

10. To add a parent group, click on the + sign beside it.

11. After clicking on the + sign, it will change to an x.

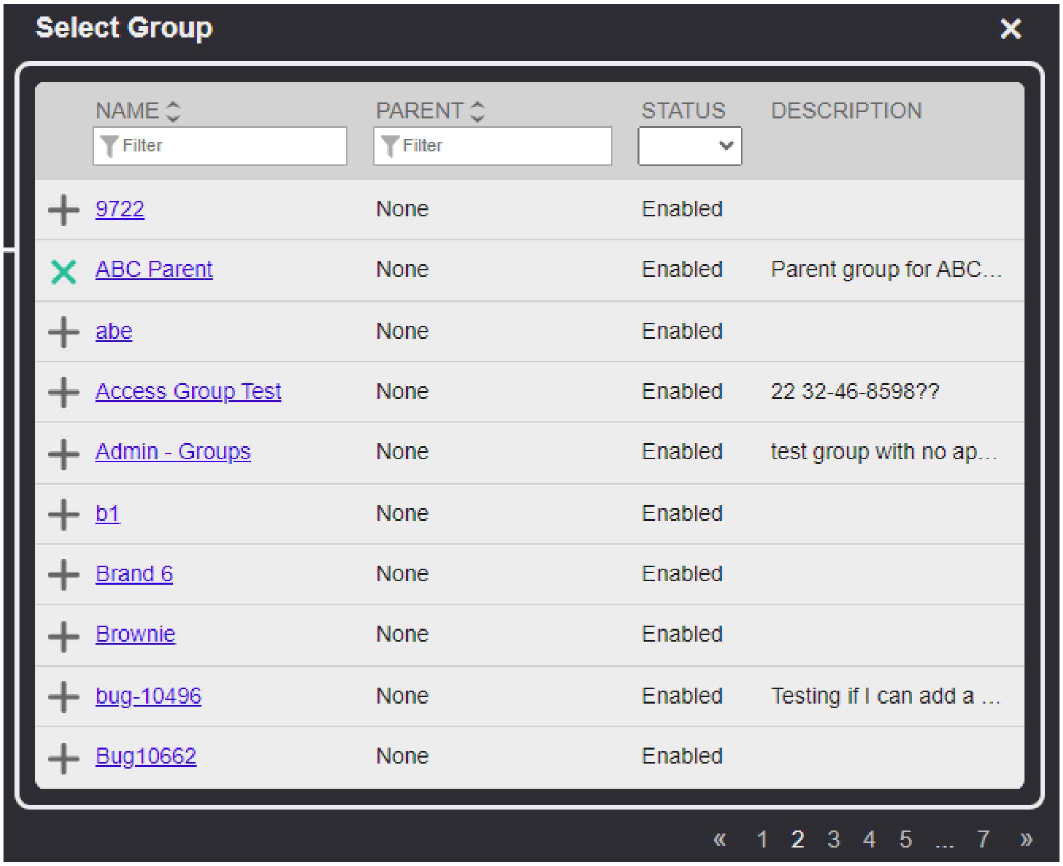


Figure 21-76. Parent Group Selected

12. After selecting the parent group and closing the Select Group window (by clicking the x in the upper right corner of the window or by clicking a blank area of the screen), the group will display under Parent Group at the bottom of the Add/Edit Group page.

Figure 21-77. Parent Group

NOTE: The parent group displays as a clickable link that, when clicked, will open the group record in a new browser tab for the Administrator to review the parent group without having to leave the group record they are working in.

13. The Enabled checkbox at the top of the Add/Edit Group screen should already be checked by default. This is what makes the group account active in the system. To disable a group, uncheck this box.

Figure 21-78. Enabled Checkbox

14. Assign a role or roles to the group (optional).
    a. If the name of the role is known, enter it in the search window and press enter or click on the magnifying glass icon.

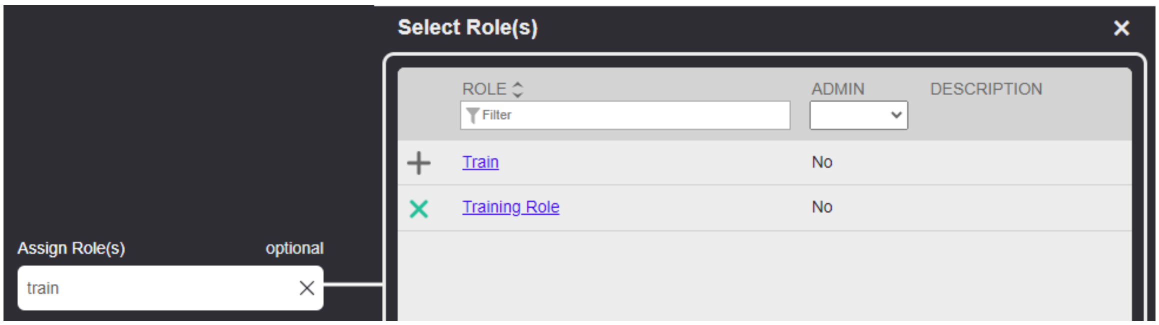


Figure 21-79. Assign Role Window

    b. Alternatively, you can leave the Assign Role window blank and press enter or click on the magnifying glass icon to open the flyout and display all roles.

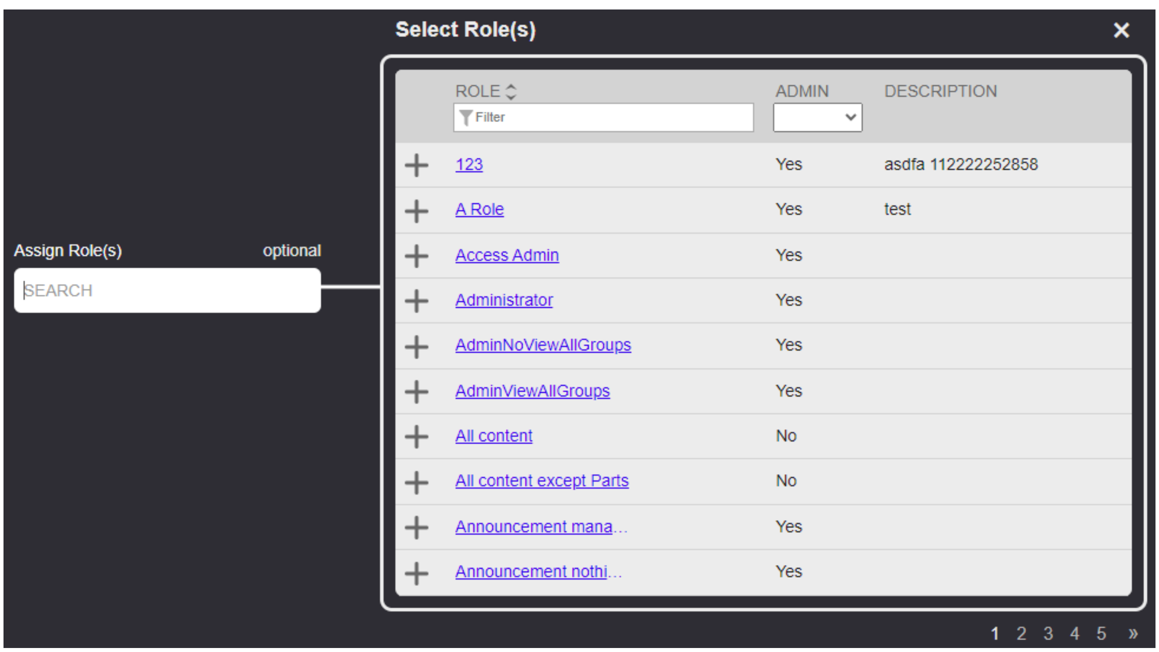


Figure 21-80. All Roles

NOTE:

If there are more than ten roles, use the screen numbers on the bottom right of the Roles window to scroll through the list.

Enter text in the search box for Role to filter the list based on the text entered.

15. Click on the plus sign beside the role to add it.
16. After a role is selected, the plus sign will change to an X.

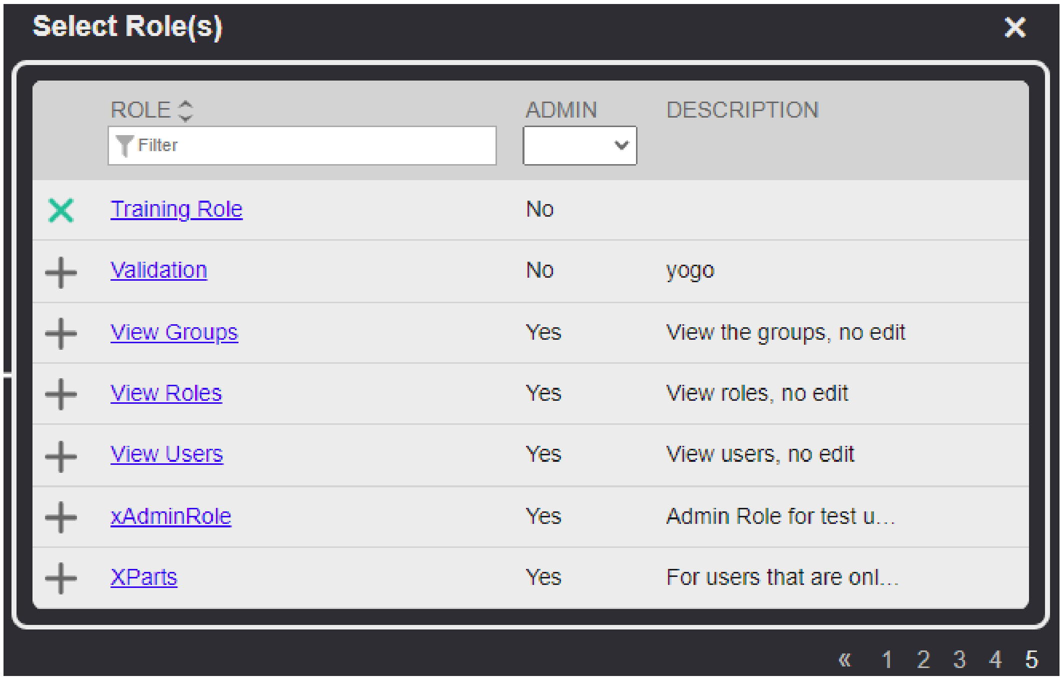


Figure 21-81. Selecting Roles

a. After selecting the role, close the Select Role window by clicking on the x in the upper right corner or clicking a blank area of the screen. The role you selected will display at the bottom of the Add Role page under the Roles header.

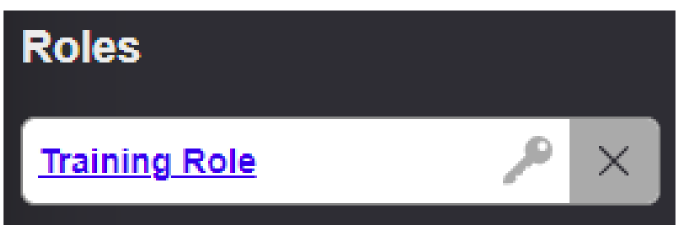


Figure 21-82. Selected Roles

NOTE: The selected roles display as clickable link(s) that, when clicked, will open each role record in a new browser tab for the Administrator to review the roles without having to leave the group record they are working in.

17. Add users to the group (optional). A group can have multiple users assigned to it.
    a. If the name of the user is known, enter it in the search window and press enter or click on the Magnifying Glass icon.

Figure 21-83. Add User(s)

    b. Alternatively, click on the Magnifying Glass icon to open the flyout to display all users.

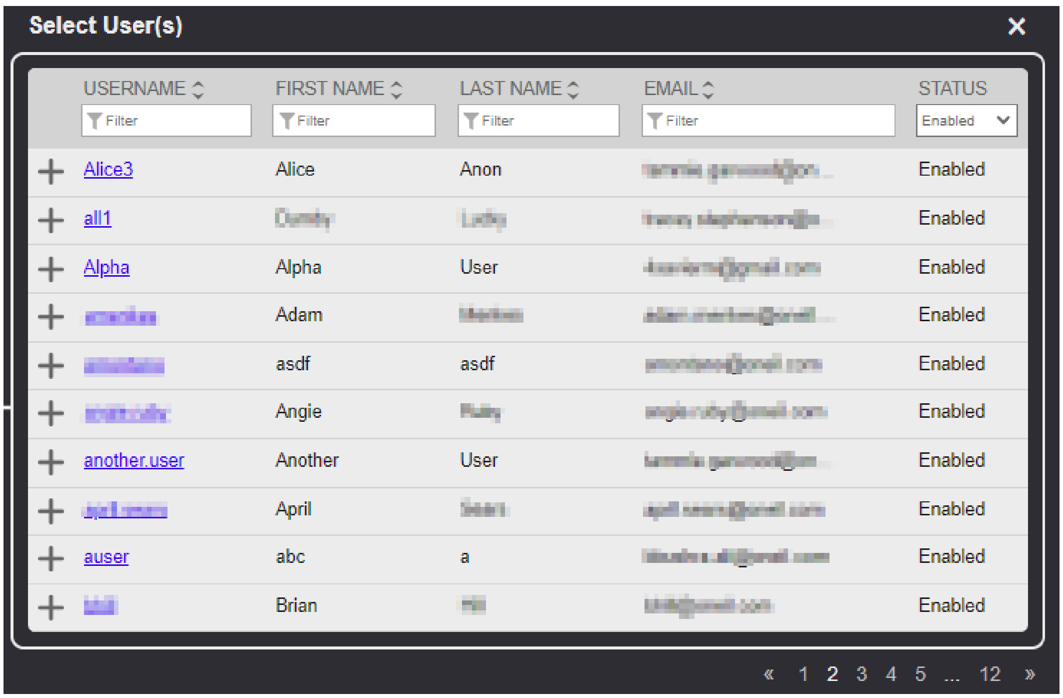


Figure 21-84. Display All Users

    c. To add a user, click on the plus sign beside the user's name.

18. After a user is selected, the plus sign will change to an x.

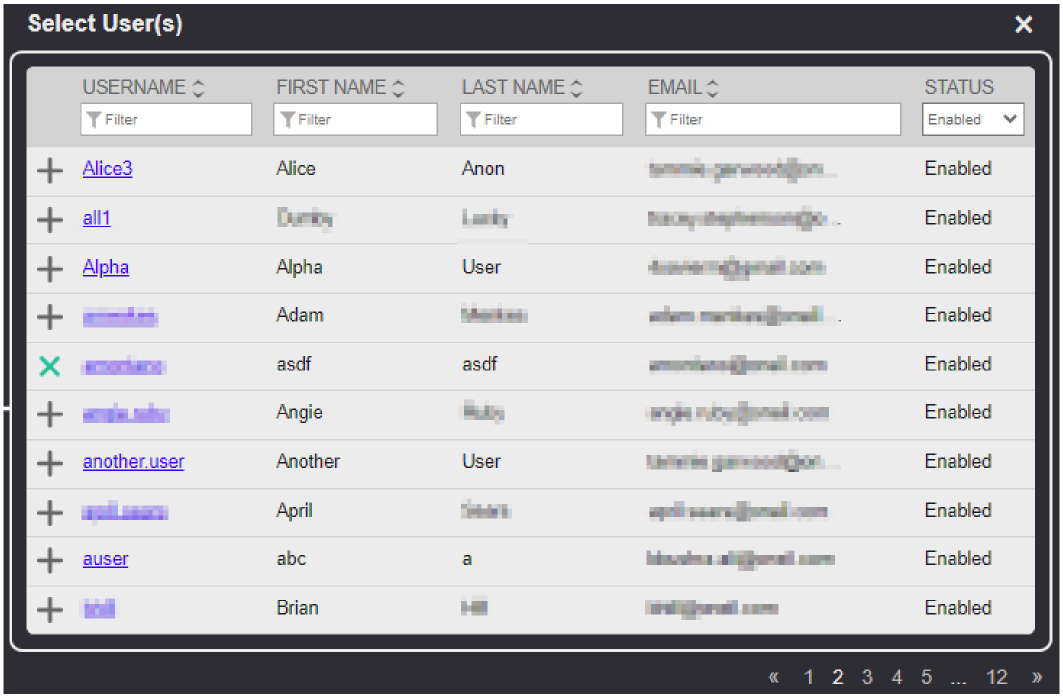


Figure 21-85. Selected User

19. After selecting users, close the Select User window by clicking on the x in the upper right corner or clicking a blank area of the screen.
20. The number of users added to the group will display as a counter beside the View Group Users icon.

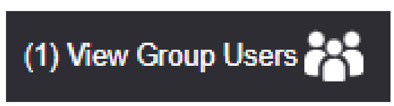


Figure 21-86. View Group Users Counter

21. Click on the View Group Users icon to view the list of users assigned to the group.

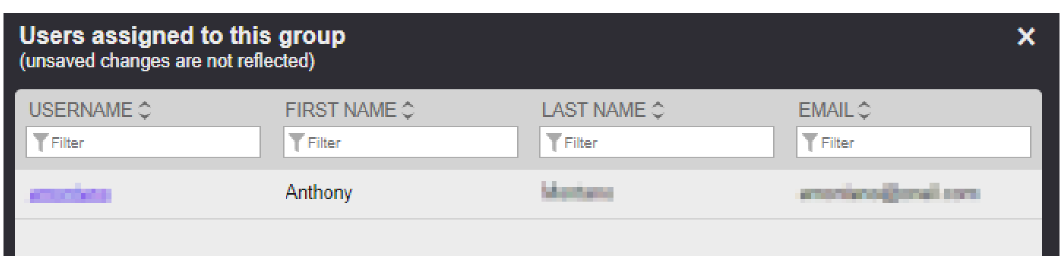


Figure 21-87. Assigned Group Users

22. After adding all group information, click on the Save Group icon to save edits. It is recommended to save often while adding group information as it will be lost if the session times out after approximately 30 minutes of inactivity.

Figure 21-88. Save Group

23. Click on the Close button beside the Save Group icon to exit the Add/Edit Group page.

Viewing Permissions

1. To view permissions associated with assigned and inherited roles, click View Permissions icon at the bottom or the Add/Edit Group page in the Roles section.

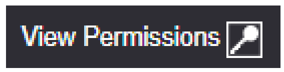


Figure 21-89. View Permissions

2. The list of effective permissions wiill display on the upper right of the Add/Edit Group page.

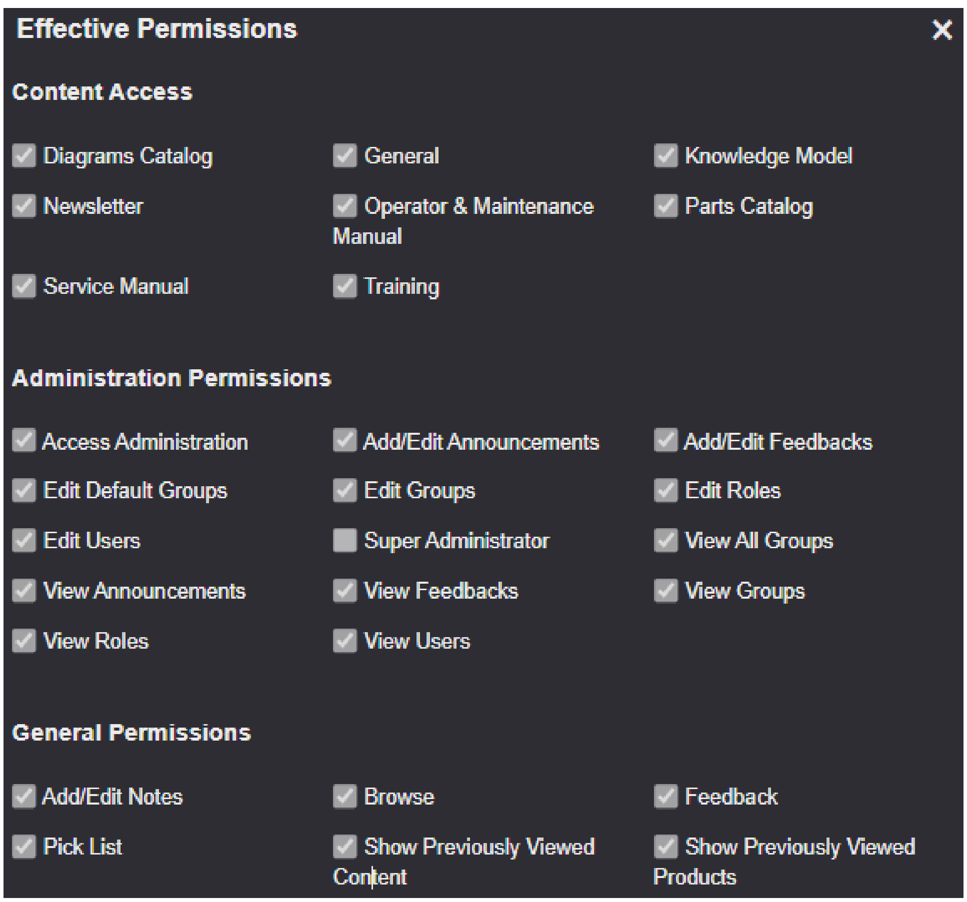


Figure 21-90. Effective Permissions

View Group Applicability

All applicabilities assigned to the Group are listed under Group Effective Applicability towards the bottom of the Add/Edit Group screen. This section appears after Parent Group information and before Role information.

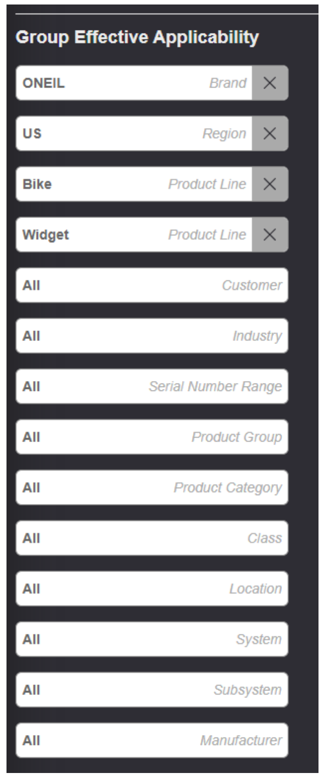


Figure 21-91. Group Effective Applicability

Please note applicability categories and their values will vary by customer. The ones shown in the screenshot above are just for illustration purposes.

Some things to keep in mind when working with applicabilities at the group level:

- A group does not have to have a parent group assigned.
- If one is assigned, a group can only have one parent.
- If no applicabilities are assigned to a group by an Administrator, and the group in question has a parent, the group will inherit the applicabilities assigned to the parent group.
- If a group record originally inherited applicability from its parent group for a given category, and then later the group record was manually changed to have less applicability, the group will lose the other applicabilities belonging to the category.
- A group cannot have ***more*** applicability in a given category than its parent group, if one exists.
- A user assigned to a group cannot have more applicability in a given category than their assigned group, if one exists.

If a group record is modified to have less applicability than any of its assigned users, the system will generate the following error:

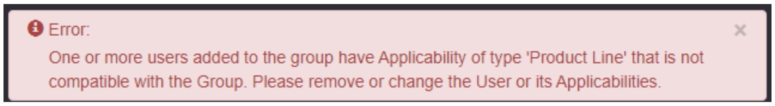


Figure 21-92. Error When a User Has More Applicability than the Group

View Parent Group Applicability

To view applicability assigned to a group's parent group while inside the child group record, click on View Parent Applicability which appears in the Parent Group section.

Figure 21-93. View Parent Applicability

A read-only list of all applicabilities assigned to the parent group will display to the right of the child group information.

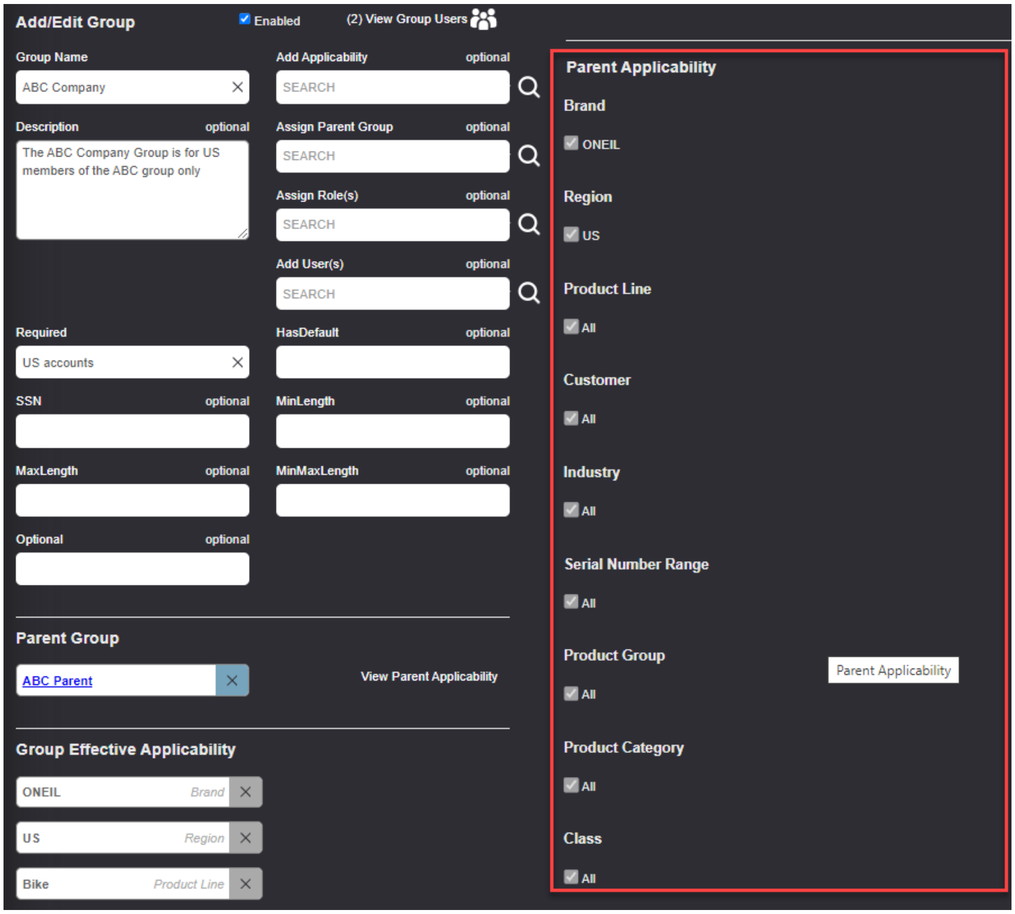


Figure 21-94. Parent Applicability

Please note applicability categories and their values will vary by customer. The ones shown in the screenshot above are just for illustration purposes.

Some things to keep in mind when working with applicabilities at the parent group level:

- A parent group can have multiple child groups, but a child group can only have one assigned parent group.
- A parent group will either have more applicabilities in a given category than its child groups, or it will have the same applicabilities. It cannot have fewer applicabilities than its children.

  For example, Product Line applicability has been set to All for the parent group in the above screenshot while for the group record it has been set to Bike. This is allowed. The reverse would not be allowed as the group record would have more Product Line applicability than its parent group.
- If no applicability is manually assigned to a group, it will inherit the applicabilities of its parent group, if one has been assigned.
- Parent applicability can also be viewed by clicking on the name of the parent group shown in the screenshot. Doing so will open the parent group record in a new browser window.
- To change applicability assigned to the parent group, it needs to be done to the parent group record.

Edit Default Group

A default group is assigned to a user automatically when a group is not assigned to them by an Administrator. The default group does not include any Administrators or Super Administrators.

Adminstrators can edit the default group from the Groups option under Adminstration. To edit the settings for the default group:

1. Click on the Administration tab.

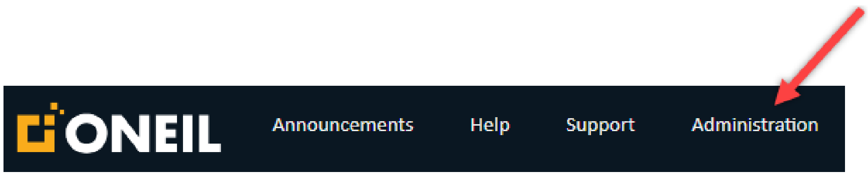


Figure 21-95. Administration Tab

2. Click on Groups.

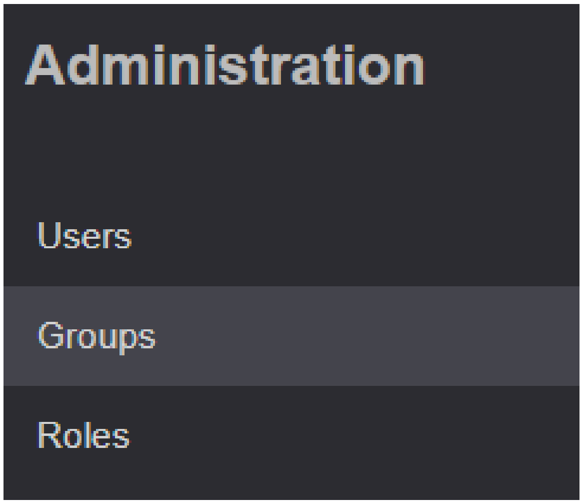


Figure 21-96. Group Tab

3. The All Groups page displays.

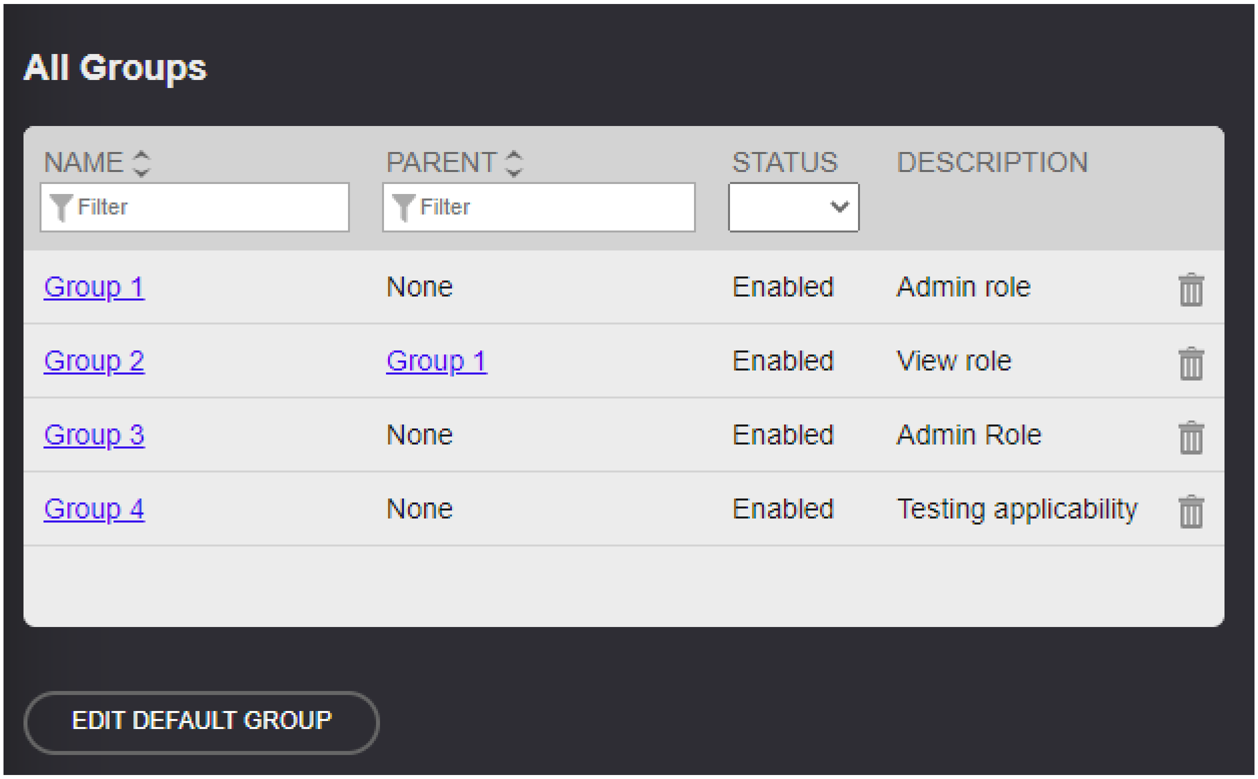


Figure 21-97. All Groups

4. Click on the Edit Default Group button at the bottom of the page.

Figure 21-98. Edit Default Group Button

5. The current settings for the default group will display.

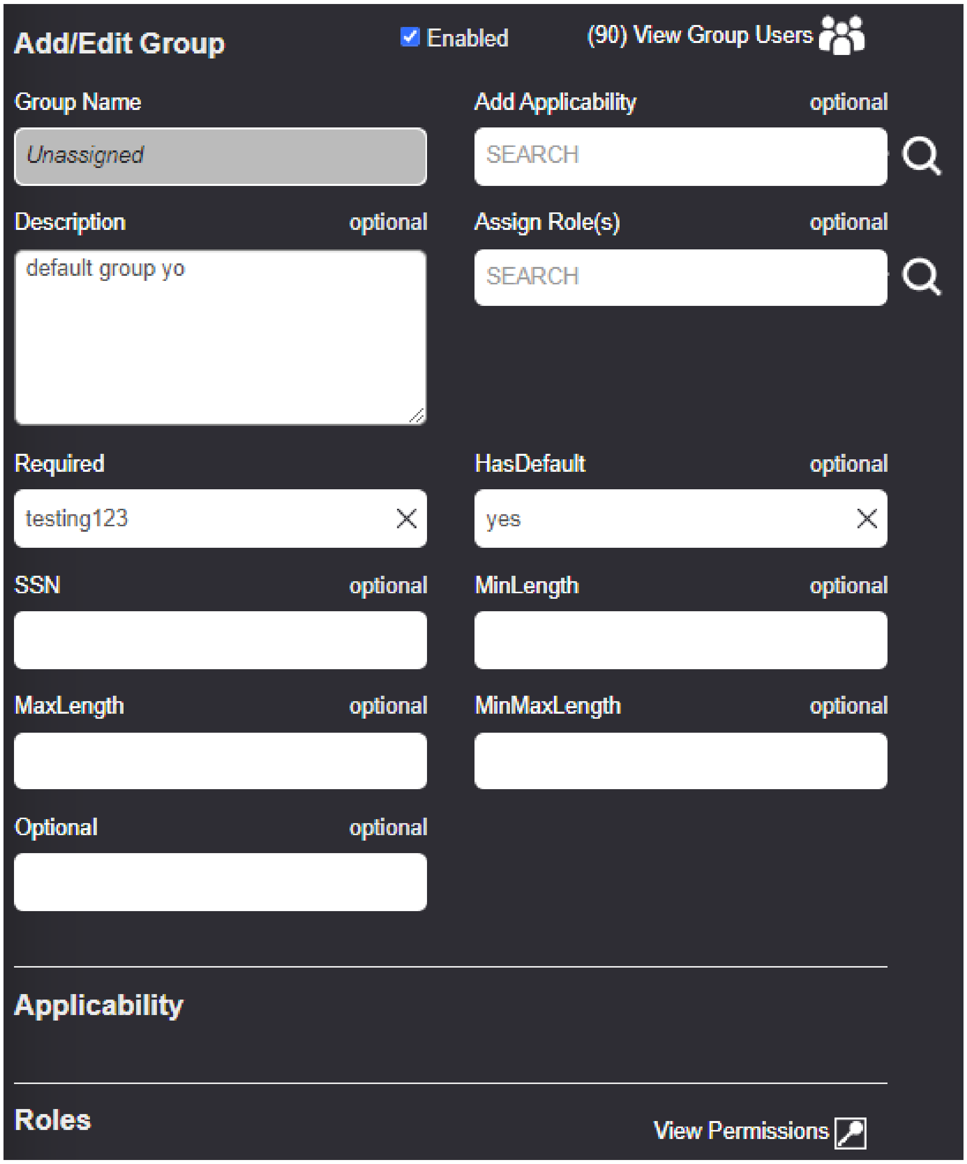


Figure 21-99. Default Group Settings

NOTE: With the exception of Group Name and the list of users displayed after clicking on the View Group Users icon, which are read-only and cannot be edited, all other fields can be edited.

6. Refer to Adding/Editing Groups for instructions for editing group records, including adding applicabilities and roles.

7. Click the Save Group icon at the top of the Add/Edit Group page to save changes.

Figure 21-100. Save Group

8. Click the Close button beside the Save Group icon to return to the All Groups page.

Edit Guest Group

The Guest group is for users who do not log into the ONeSOURCE Client but click on the Continue as Guest option (if this option is available to the customer). If the customer configuration supports guest access, it is set up by an Admininstrator with limited functionality. Administrator or Super Administrator roles cannot be added to the Guest group.

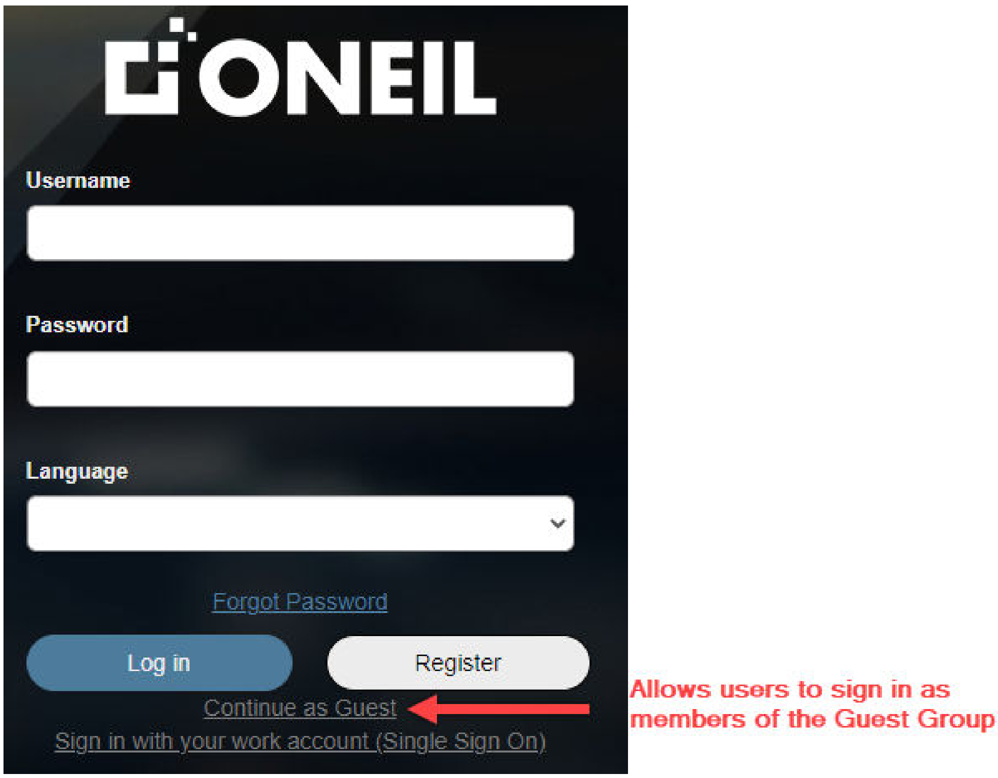


Figure 21-101. Guest Group Sign-In

To edit the settings of the guest group:

1. Click on the Administration tab.

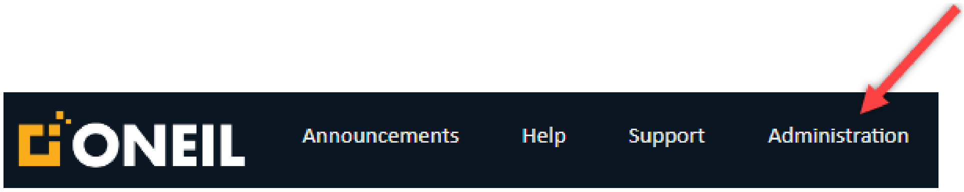


Figure 21-102. Administration Tab

2. Click on Groups.

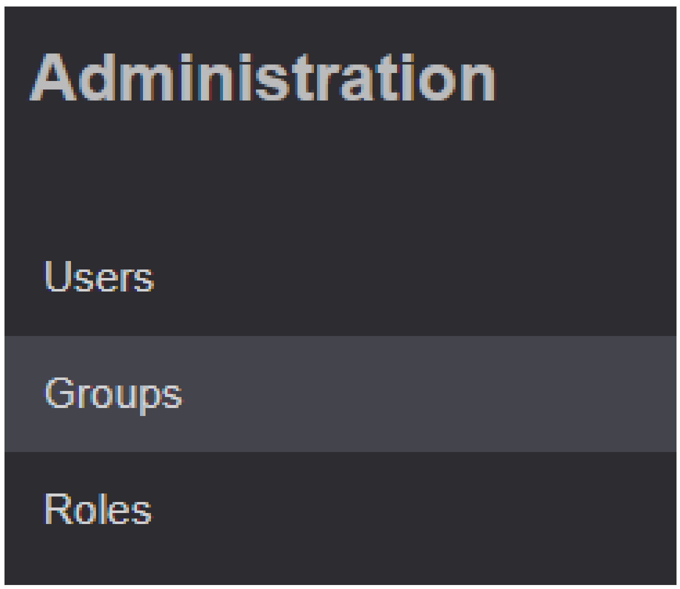


Figure 21-103. Groups Tab

3. The All Groups page displays.

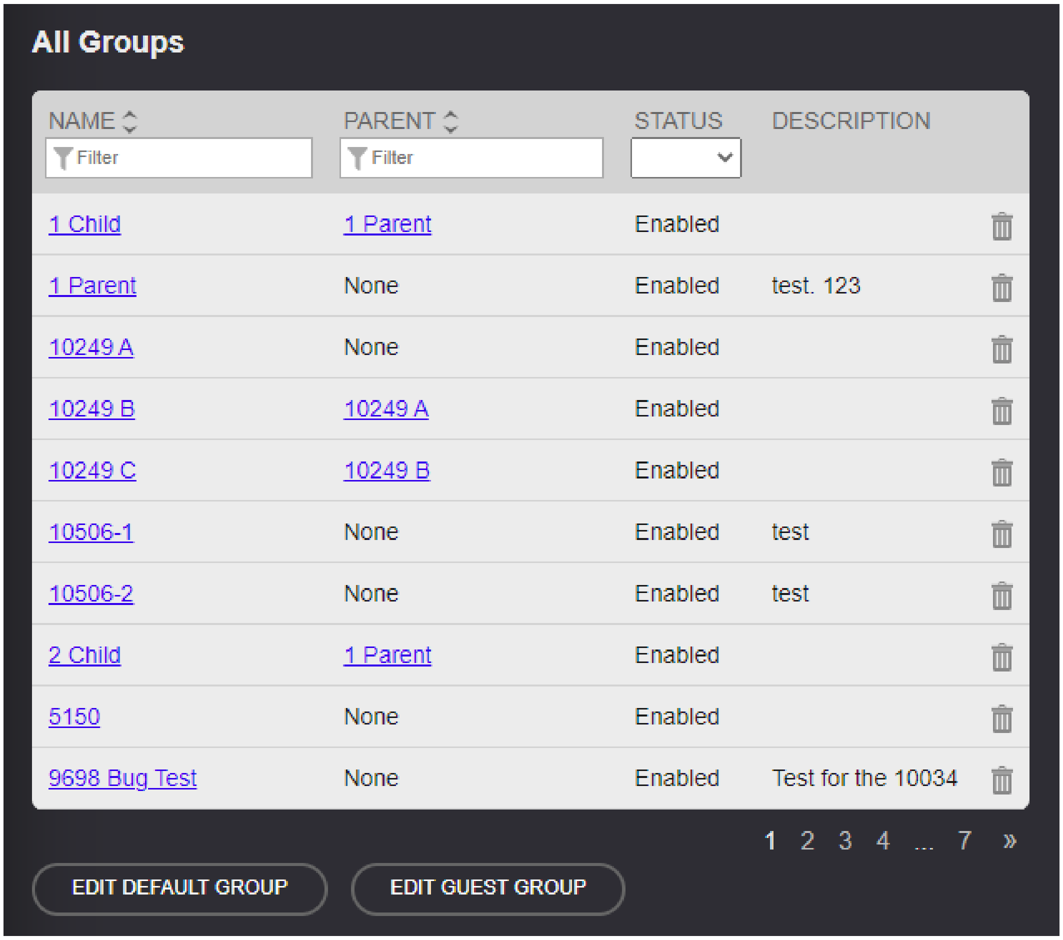


Figure 21-104. All Groups Page

4. Click on the Edit Guest Group button at the bottom of the page.

Figure 21-105. Edit Guest Group Button

5. The current settings for the default group will display.

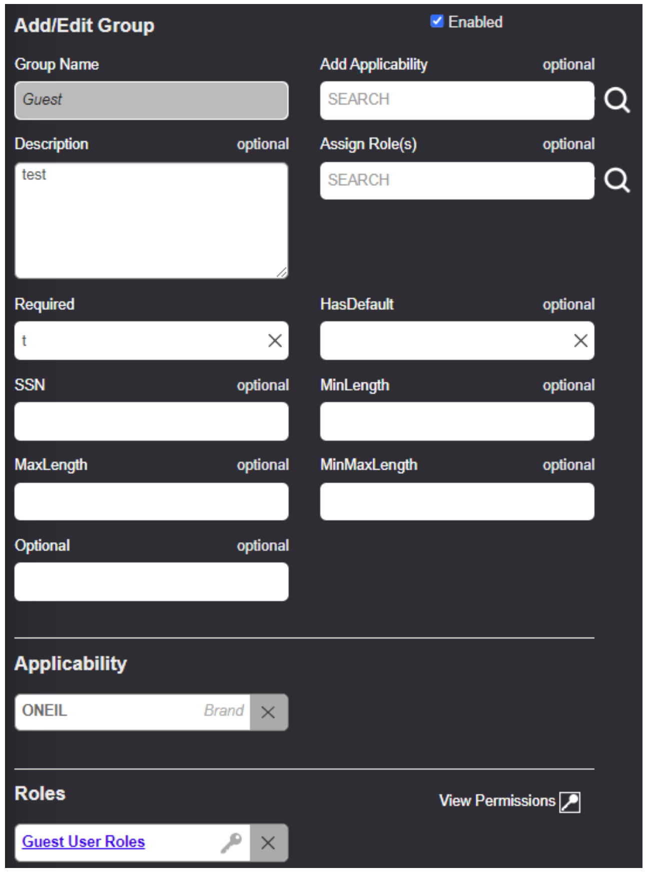


Figure 21-106. Guest Group Settings

NOTE:

a. With the exception of Group Name, which is read-only and cannot be edited, all other fields can be edited.

b. You cannot view users assigned to the Guest group. This is because they do not actually have accounts in the system. Guest user accounts are given usernames that are generated by the system.

6. Refer to Adding/Editing Groups for instructions for editing group records, including adding applicabilities and roles.

7. Click the Save Group icon at the top of the Add/Edit Group page to save changes.

Figure 21-107. Save Group

8. Click the Close button beside the Save Group icon to return to the All Groups page.

Manage All Groups

The list of all groups is displayed when the Groups option is selected under Administration.

1. Click on the **Administration** tab.

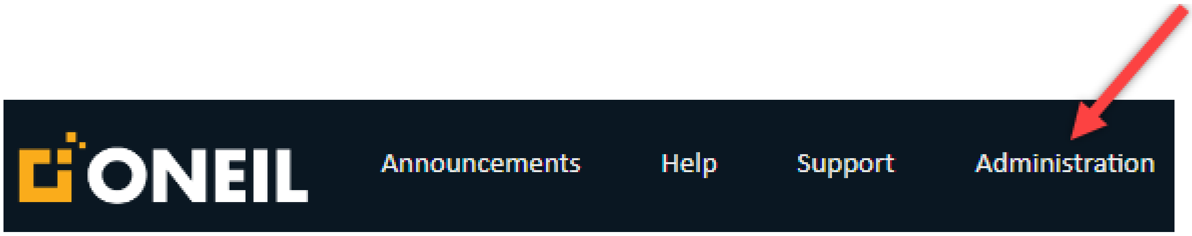


Figure 21-108. Administration Tab

2. Select **Groups**.

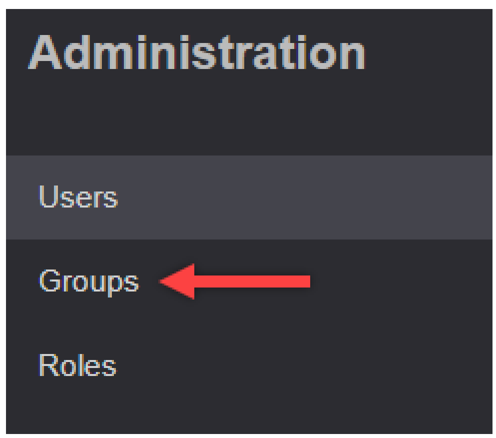


Figure 21-109. Groups Tab

3. The list of all groups is displayed.

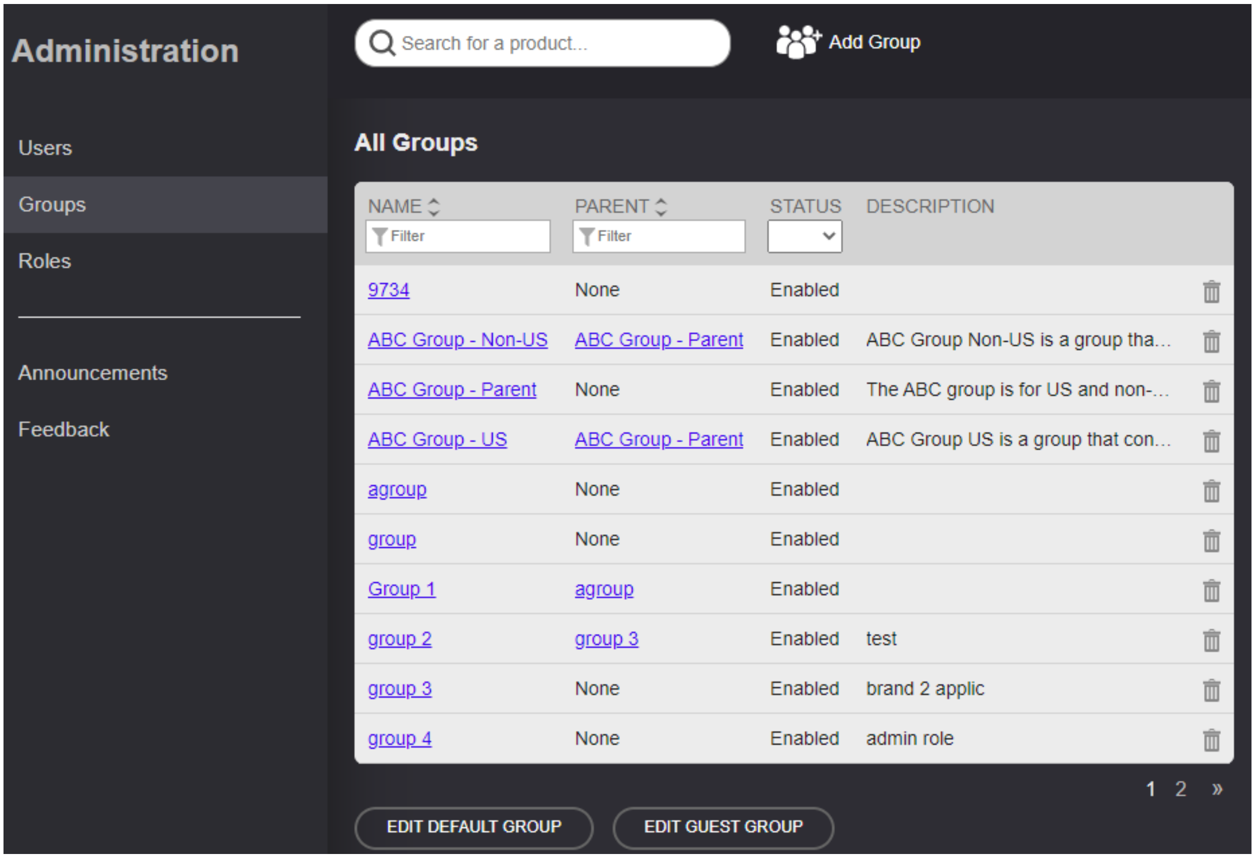


Figure 21-110. List of Groups

NOTE:

a. Each page lists 10 groups. If there are more than 10 groups, use the page numbers or arrows displayed at the bottom of each page to go to other pages.

b. If text in the All Groups list is longer than the width of its column, the entry will appear truncated followed by an ellipsis. To view the full text, hover the mouse over the entry.

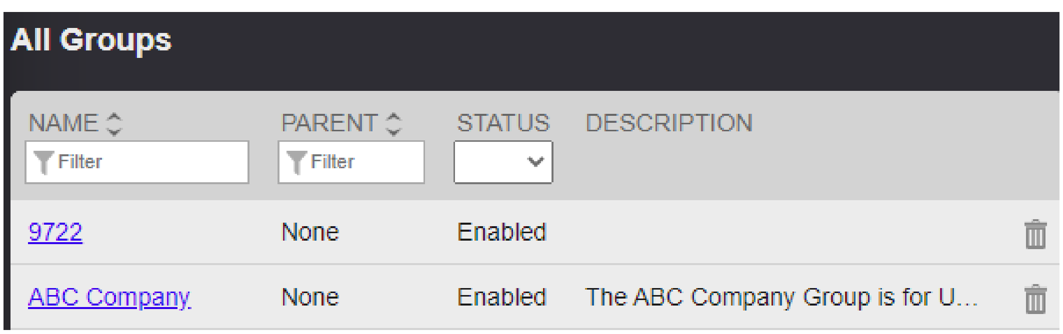


Figure 21-111. Example of Long Description

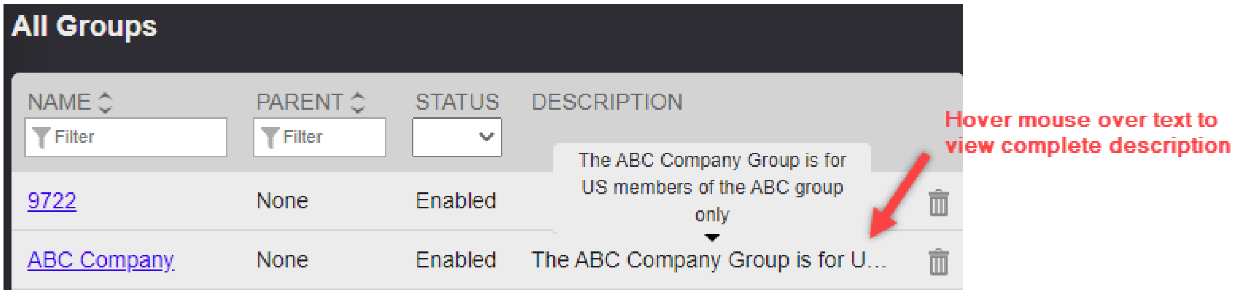


Figure 21-112. Example of Long Description (Continued)

4. To sort the list of groups, click anywhere in the column header for NAME or PARENT.

Figure 21-113. Column Headers

NOTE:

a. The default display is *ascending by NAME*.

b. Each click on a column header changes the sort order between ascending or descending for that column.

5. To filter the list of groups, type the search criteria in either the NAME or PARENT filters. The search performed is a "starts with" search as opposed to a "contains" search, meaning the system will look for the search string at the beginning of the content and not in the middle of the content.

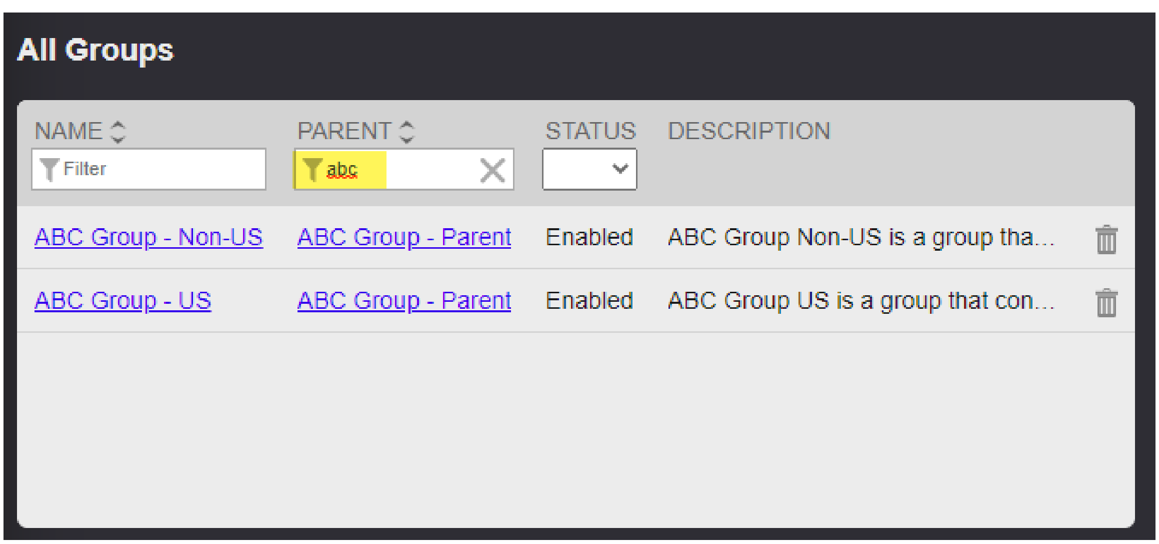


Figure 21-114. Filtered List

NOTE:

a. The text "abc" has been entered in the PARENT field to filter content that matches.

b. Clear text entered in a filter field by clicking on the X in that field.

6. To filter results by a group's status, use the drop-down box and select the desired status.

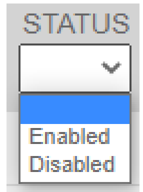


Figure 21-115. Status Drop-Down List

7. To view a specific group record from the list of all groups, click on its name.

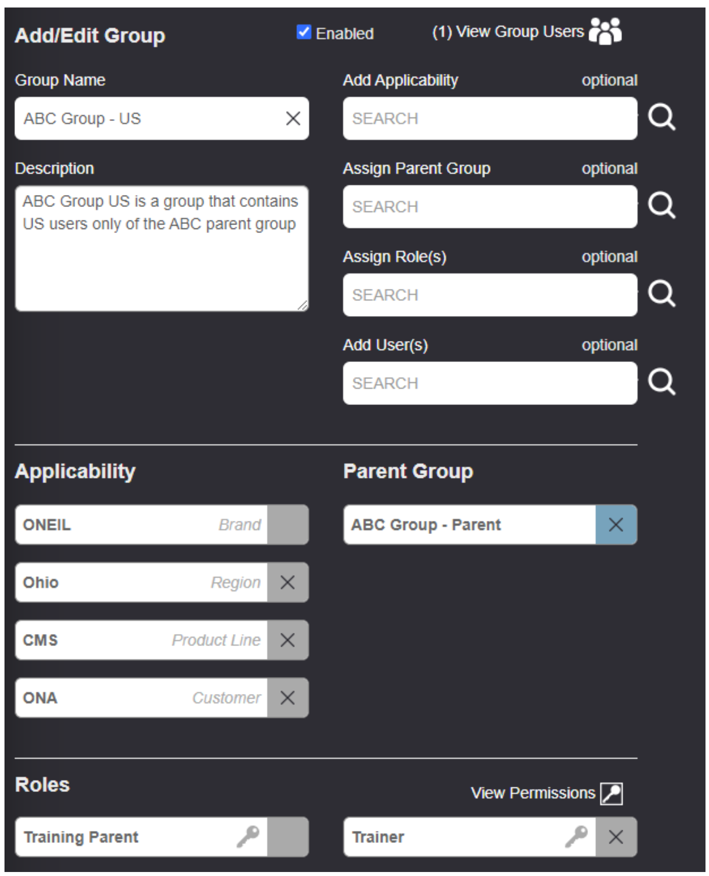


Figure 21-116. Add/Edit Group Page

8. To view the users in the group, click on the View Group Users icon.

Figure 21-117. View Group Users Icon

NOTE: A counter displays next to the icon that shows the number of users in the group.

9. A pop-up window opens displaying the users included in the group.

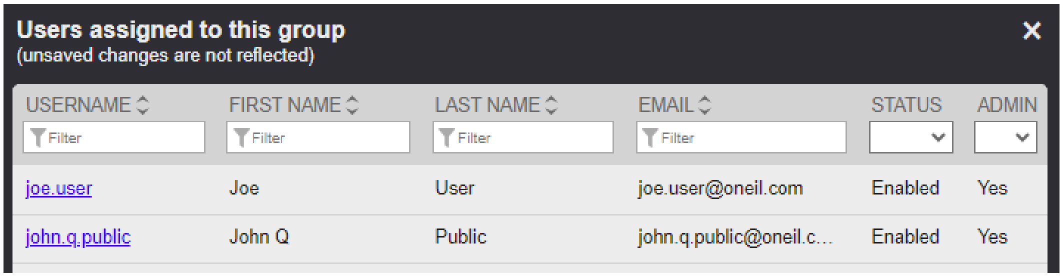


Figure 21-118. Assigned Users Window

10. To delete/remove a group from the list of all groups, you must first remove its users. If all the users in the group have already been disabled, you can delete the group.
11. If you try to delete a group with enabled users the following error message will display.

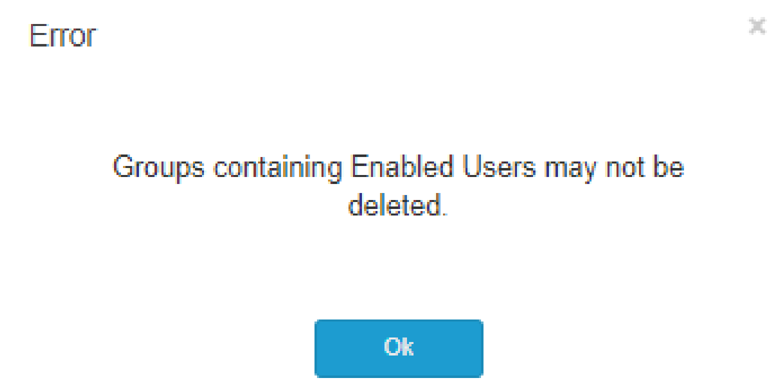


Figure 21-119. Error Pop-Up Message

12. Once all of users in the group have been removed, click on the trash can icon on the right of the group record to delete it.

13. A pop-up message will display. Click the Yes button to confirm deletion.

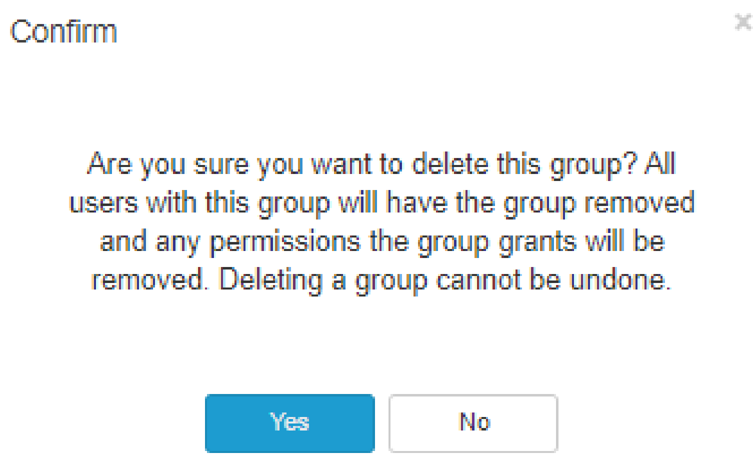


Figure 21-120. Confirm Delete Pop-Up Message

Edit Default and Guest Groups

The Default group is assigned to users automatically, when a group is not assigned to them by an Adminstrator. The default group does not contain any users who are Administrators or Super Administrators.

The Guest group is for users who do not log into the ONeSOURCE Client but sign in as guests, if this option exists. If the customer group supports group access, it is set up by an Admininstrator with limited functionality. Administrator or Super Administrator roles cannot be added to the Guest group.

Refer to Edit Default Group and Edit Guest Group for instructions on editing these groups.

Roles

Adding/Editing Roles

1. Click on the **Administration** tab.

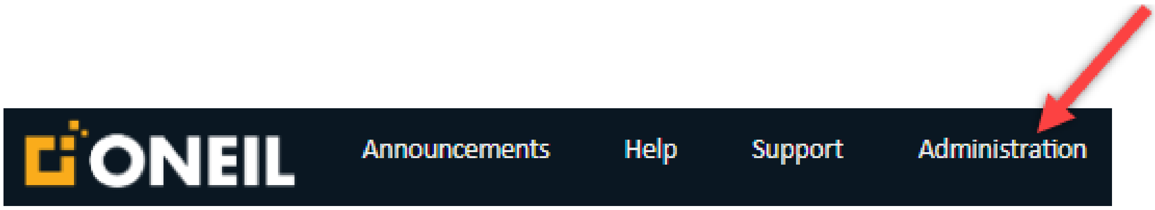


Figure 21-121. Administration Tab

2. Select **Roles**.

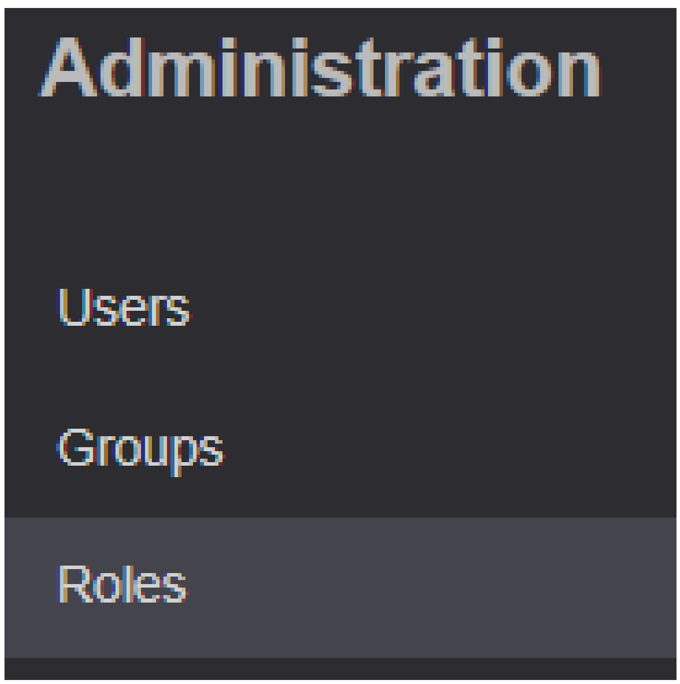


Figure 21-122. Roles

3. Click on the Add Role icon.

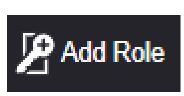


Figure 21-123. Add Role

4. The **Add/Edit Role** page opens.

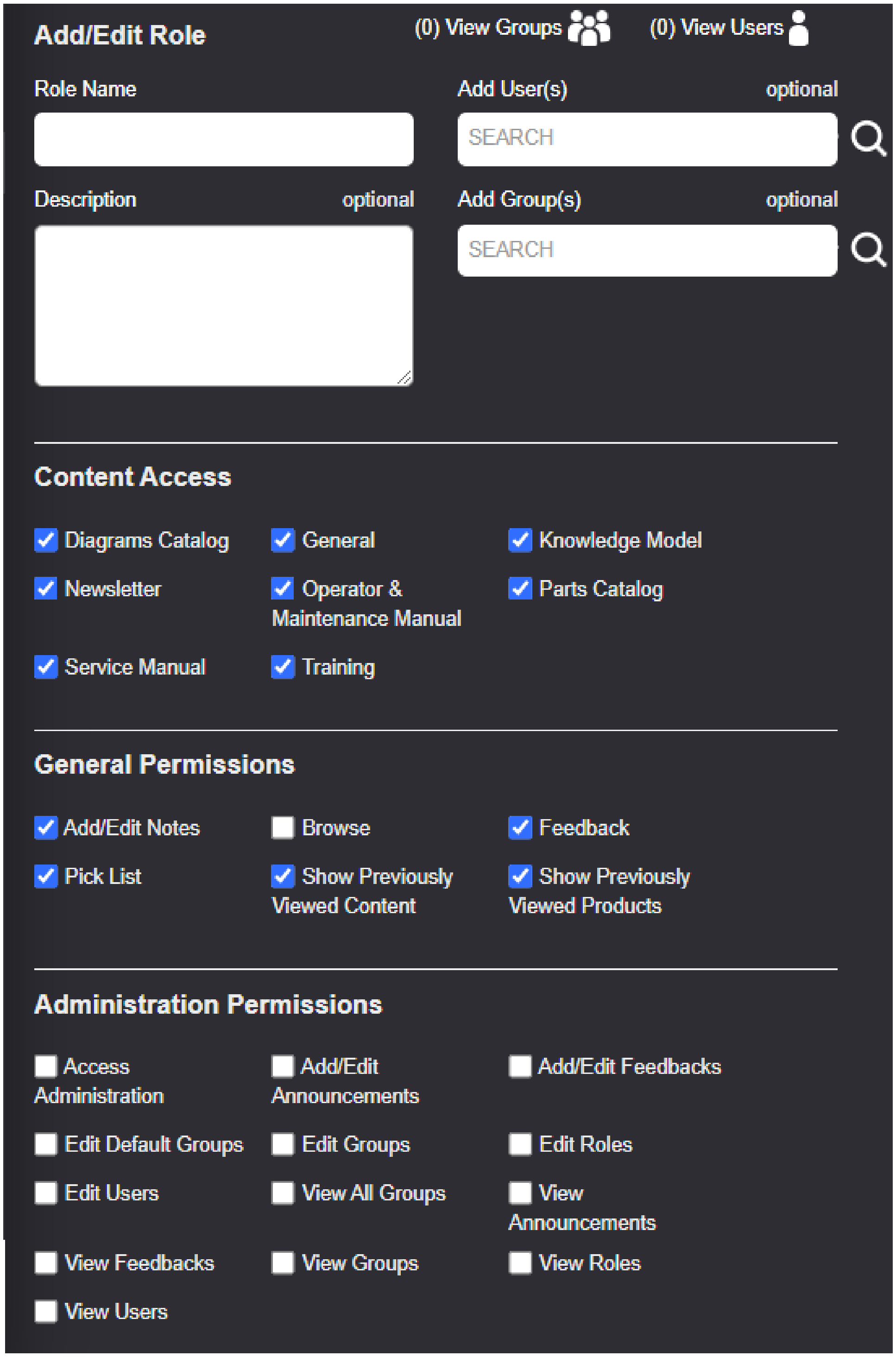


Figure 21-124. Add/Edit Role Page

5. Enter a name for the role (required).

Figure 21-125. Role Name

NOTE: Role names must be unique across the system. Before entering a name for a role that may already exist, use the search window on the Add/Edit Role page to see a record exists for that name.

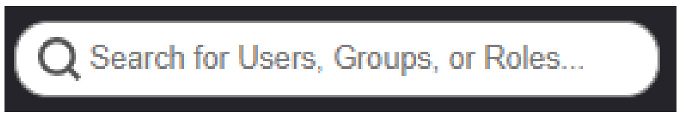


Figure 21-126. Search Window

6. Add a description of the role in the Description field (optional).

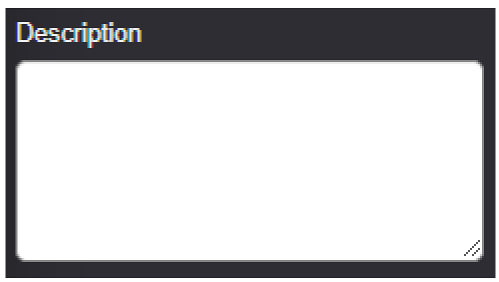


Figure 21-127. Description

The Description field is similar to the Notes field on the **Add/Edit Users** screen. The Description text box can be expanded by clicking and dragging the bottom right corner.

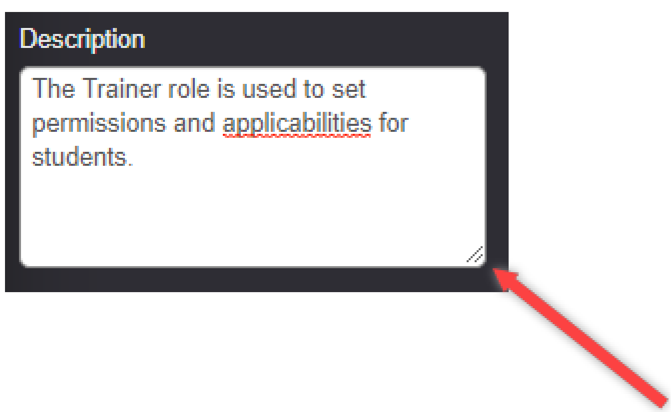


Figure 21-128. Expand Description Box

7. Add users (optional).

Figure 21-129. Add User(s)

a. If the name of the user is known, enter it in the search window and press enter or click on the Magnifying Glass icon.
b. Alternatively, leave the Add User(s) window blank and click on the Magnifying Glass icon to open the flyout to display all users.

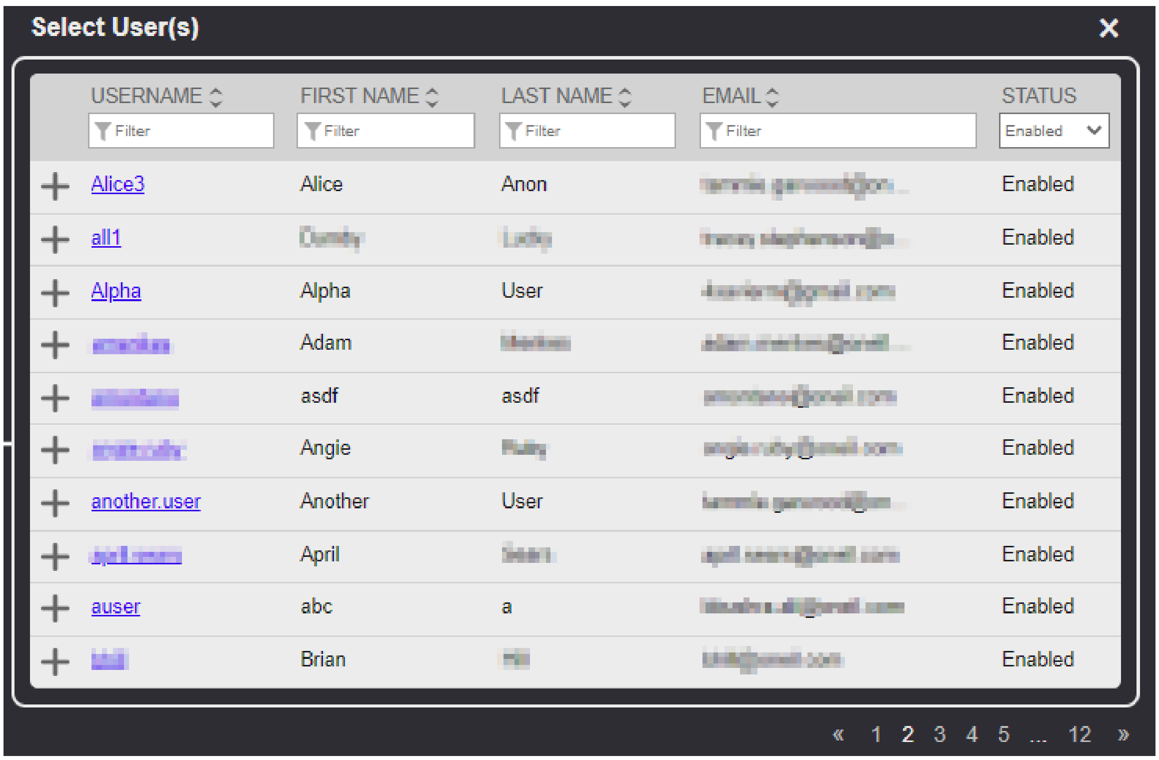


Figure 21-130. All Users

8. To add a user, click on the plus sign beside the username.
9. After clicking the plus sign, it will turn to an X.

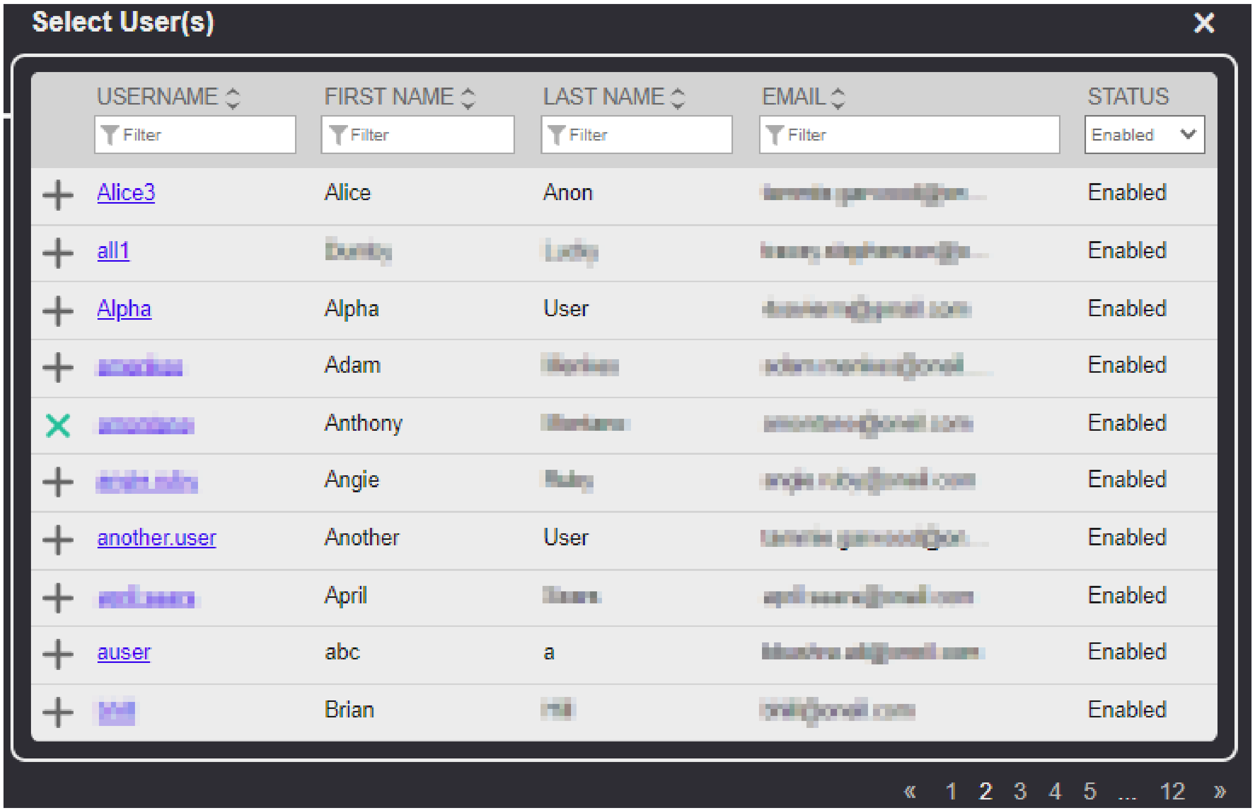


Figure 21-131. Select Users

10. When finished adding users, close the flyout window either by clicking the **x** in the upper right corner of the Select User(s) window, or by clicking a blank area of the screen.
11. Add group(s) (optional).
    a. If the name of the group is known, enter it in the search window and press enter.

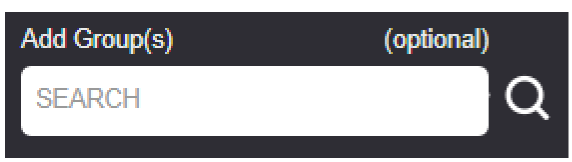


Figure 21-132. Add Group(s)

    b. Alternatively, click on the magnifying glass icon to open the flyout and display all groups.

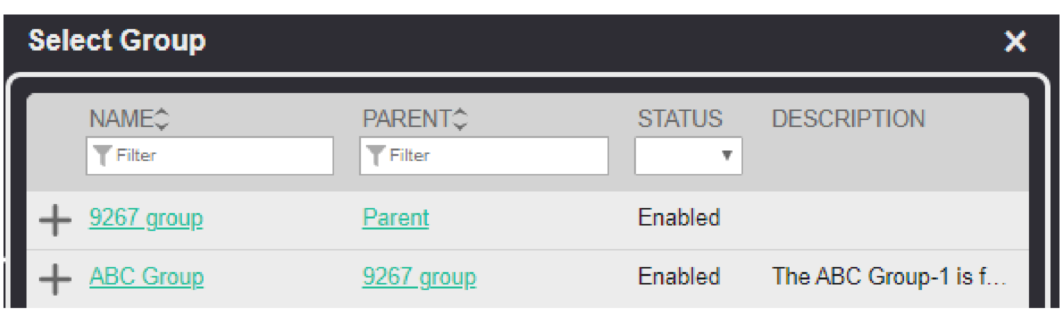


Figure 21-133. Select Group

c. To add a group, click on the plus sign beside the group name. Clicking on the plus sign will change it to an X.

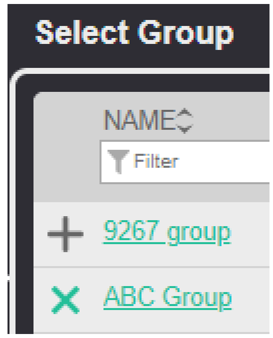


Figure 21-134. Select Group

d. Close the flyout window either by clicking the x in the upper right corner of the Select Group window, or by clicking blank area of the screen.

NOTE: Before a role is assigned to a group or user, the counter displayed beside each category is zero.

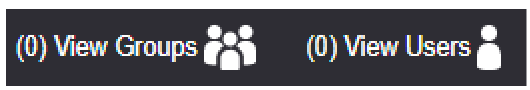


Figure 21-135. View Groups and View Users Counters

e. Click the Save Role icon to save your work. The counters will be updated to show how many groups and/or users have been added.

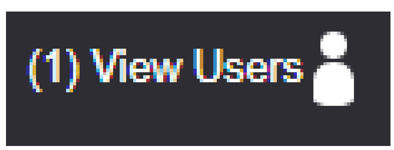


Figure 21-136. View Users Counter

12. Edit Content Access.

    The Content Access section lists the content a role can access. If a box is checked, it means access is granted. To remove access, uncheck the box next to the content type.

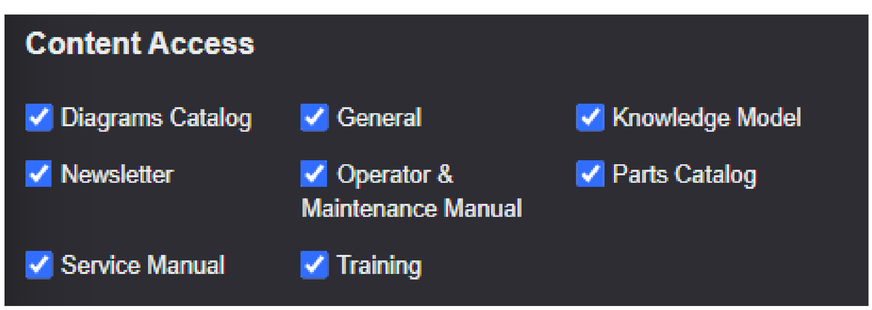


Figure 21-137. Content Access

13. Edit Permissions.

    The General and Administration Permissions sections list the permissions granted to a role. If a box is checked, it means the permission is granted. To remove access, uncheck the box next to the permission. When an Administrator creates a new role, the five General permissions checked below are already granted because they are inherited from the default group.

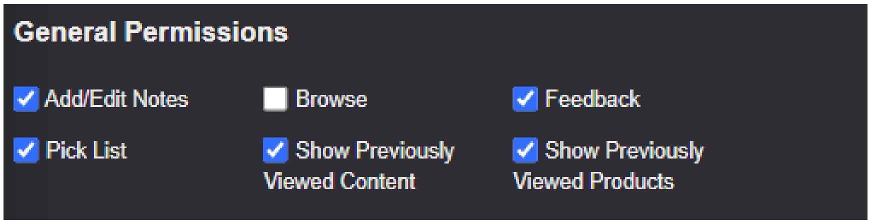


Figure 21-138. General Permissions

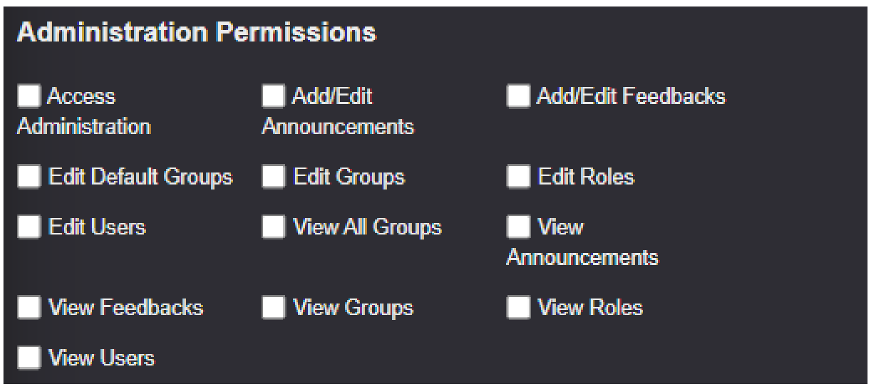


Figure 21-139. Administration Permissions

14. When all information has been entered for the role, click on the Save Role icon to save your changes. It is recommended to save often while adding information as session times out after approximately 30 minutes of inactivity.

Figure 21-140. Save Role

15. Click on the Close button to exit the Add/Edit Role screen.

Figure 21-141. Close Button

Managing All Roles

The list of all roles is displayed when the Roles option is selected under Administration.

1. Click on the **Administration** tab.

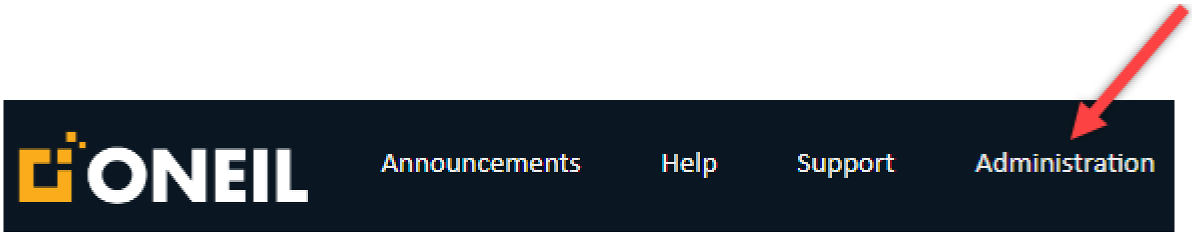


Figure 21-142. Administration Tab

2. Select **Roles**.

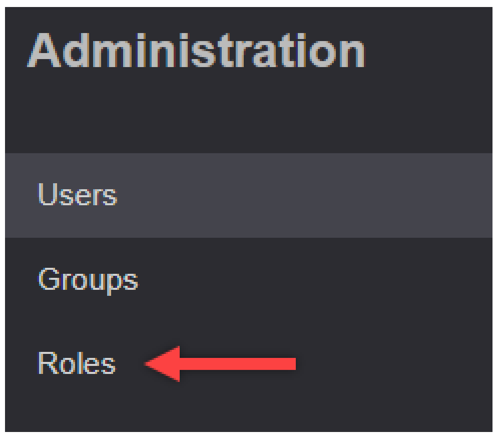
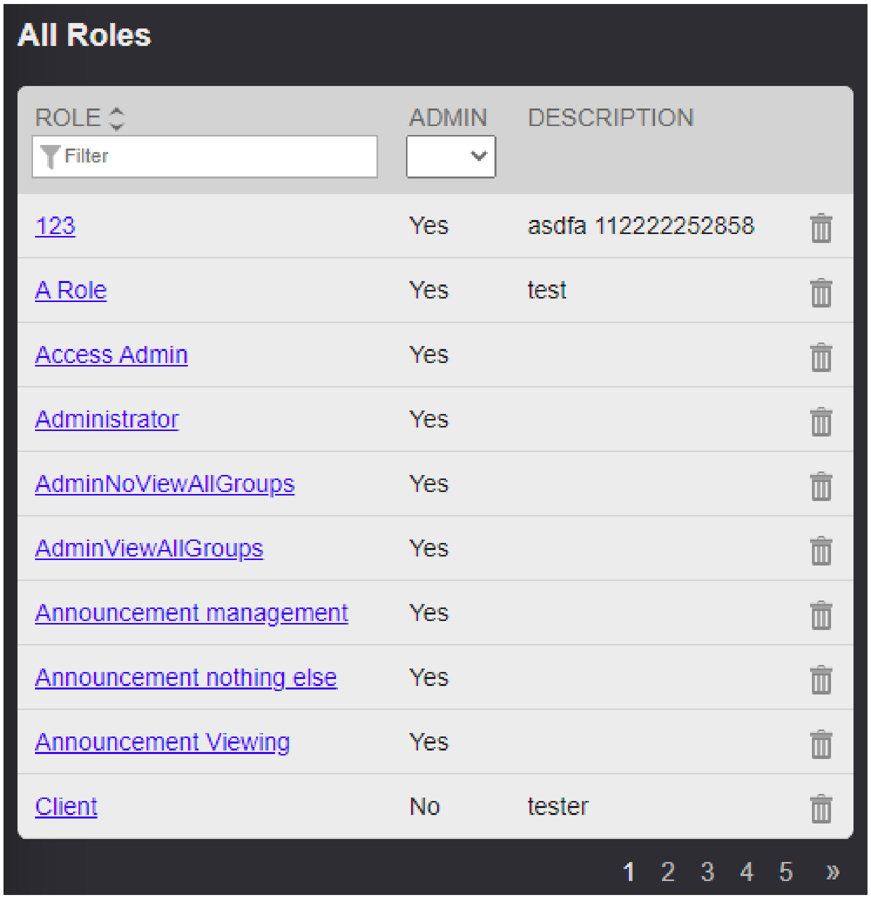


Figure 21-143. Roles Tab

3. The list of all roles is displayed.


All Roles

ROLE	ADMIN	DESCRIPTION
123	Yes	asdfa 112222252858
A Role	Yes	test
Access Admin	Yes	
Administrator	Yes	
AdminNoViewAllGroups	Yes	
AdminViewAllGroups	Yes	
Announcement management	Yes	
Announcement nothing else	Yes	
Announcement Viewing	Yes	
Client	No	tester

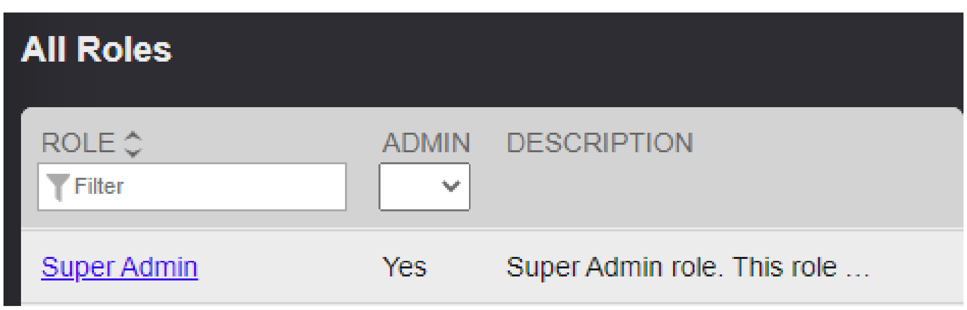
1 2 3 4 5 »

Figure 21-144. List of Roles

NOTE:

a. Each page lists 10 roles. If there are more than 10 roles, use the page numbers or arrows displayed at the bottom of each page to go to other pages.

b. If text in the All Roles list is longer than the width of its column, the entry will appear truncated followed by an ellipsis. To view the full text, hover the mouse over the entry.


All Roles

ROLE	ADMIN	DESCRIPTION
Super Admin	Yes	Super Admin role. This role …

Figure 21-145. Example of Long Description

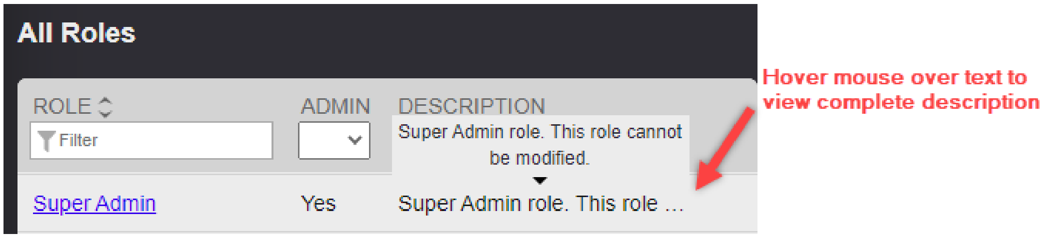


Figure 21-146. Example of Long Description (Continued)

4. To sort the list of roles, click anywhere in the column header for **ROLE**.

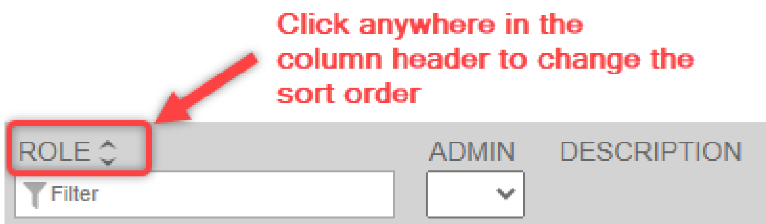


Figure 21-147. Column Header

NOTE: The default display order is *ascending by ROLE*.

5. To filter the list of roles, enter text in the ROLE field. The search performed is a "starts with" search as opposed to a "contains" search, meaning the system will look for the search string at the beginning of the content and not in the middle of the content.

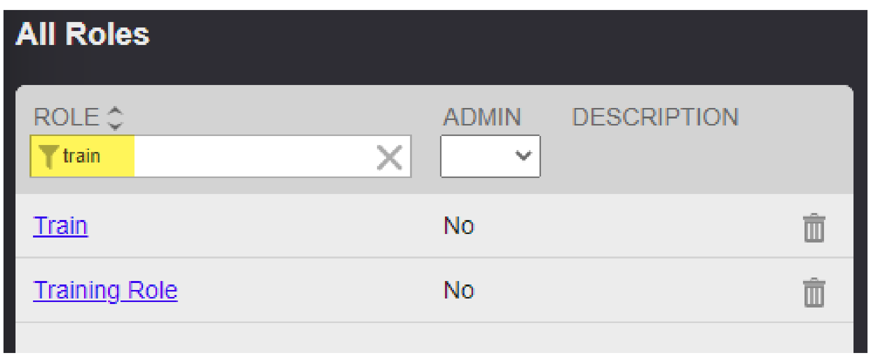


Figure 21-148. Filtered List

NOTE:

a. The text "train" has been entered in the ROLE field to filter content that matches.

b. Clear text entered in a filter field by clicking on the x.

6. To filter results by ADMIN status, select a value from the drop-down list.

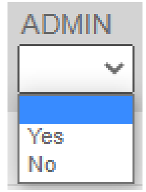


Figure 21-149. ADMIN Drop-Down List

7. To view a specific role from the **All Roles** list, click on the role name.

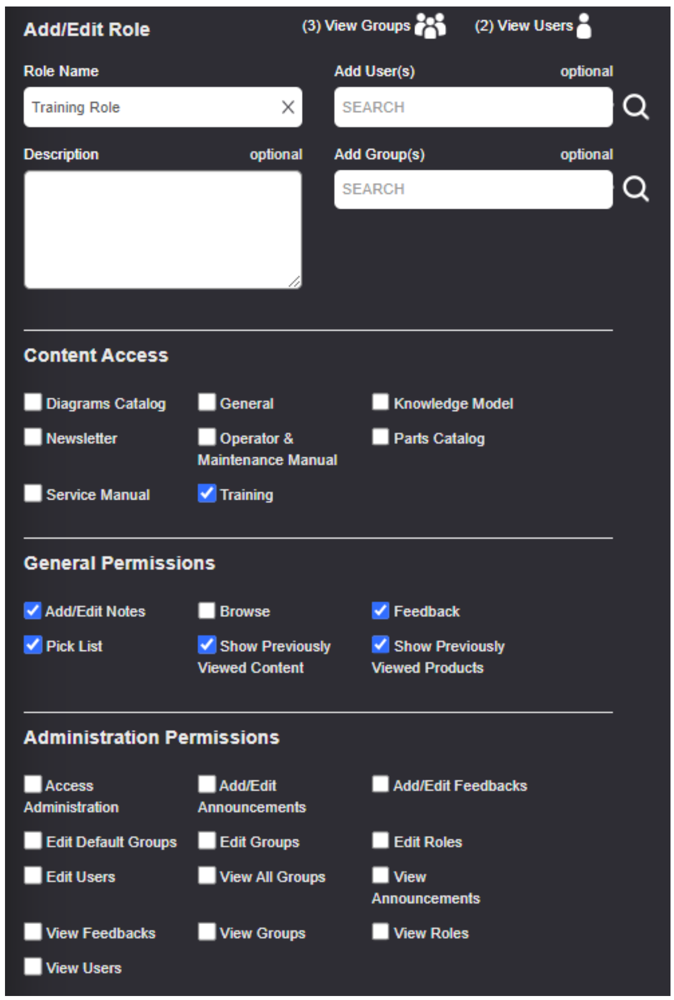


Figure 21-150. Add/Edit Role Page

8. Click the **Close** button to return to the list of all roles.

9. To delete/remove a role from the list of all roles, click on the trash can icon to the right of the role.
   a. A pop-up message will display. Click Yes to confirm deletion.

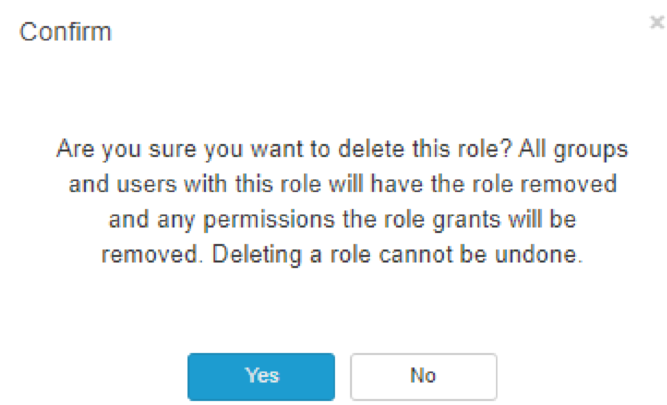


Figure 21-151. Confirm Delete Pop-Up

User Management Search Field

The search window in the user management system is an effective tool for searching across users, groups, and roles. It is available on the Administration home page, the All Users, All Groups, and All Roles pages, and on all Add/Edit pages for users, groups, and roles.

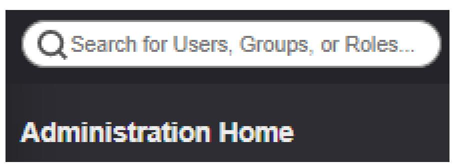


Figure 21-152. User Management Search Field

The User Management search bar works the same way as the search bar on the main page of the ONeSOURCE Client. When the user places the cursor in the search bar, they are first presented with a list of previously entered searches (if any), then a list of suggested searches based on the first few characters entered, and finally, if the user does not select a previously entered search or one of the suggested searches, the system will execute the search that they type in. In addition, the searches performed are "starts with" searches as opposed to "contains" searches, meaning the system will look for the search string at the beginning of the content and not in the middle of the content.

For more information on how to enter a search, refer to Entering a Search and the rest of the Main Search Window section of this document.

1. Search results will be displayed in up to three distinct categories: Users, Groups, and Roles.

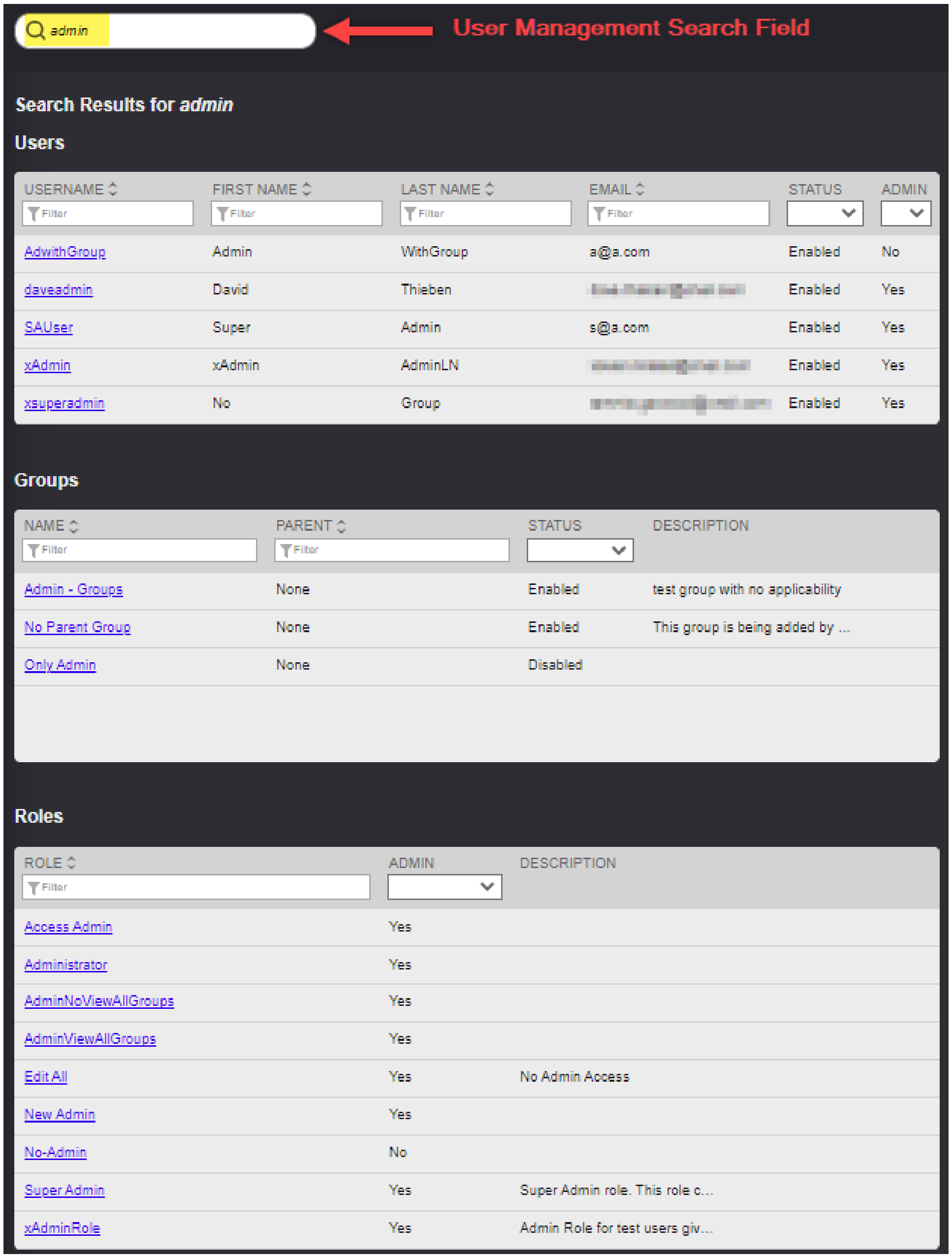


Figure 21-153. User Management Search Results List

2. From these categories, the Administrator can view details for any user, group, or role records in the search results. If they have been granted edit permissions, they can edit the information in the records as well.
3. To view or edit information for a specific user, group, or role, click on the username, group name, or role to open its **Add/Edit** page.

Appendix A - Mobile Device Screenshots

Mobile Device Screenshots

Following are screenshots for ONeSOURCE Client screens on devices like tablets and mobile phones. Only screenshots that differ significantly from those on a desktop computer are included. If there is no major difference in appearance between desktop and mobile screens, the desktop view is shown throughout the document.

Mobile - Client Ribbon

For mobile devices, there is no ribbon going across the top of the screen as there is for desktop PCs. Instead, mobile users expand and collapse a navigation menu in the upper left of the screen to select other options.

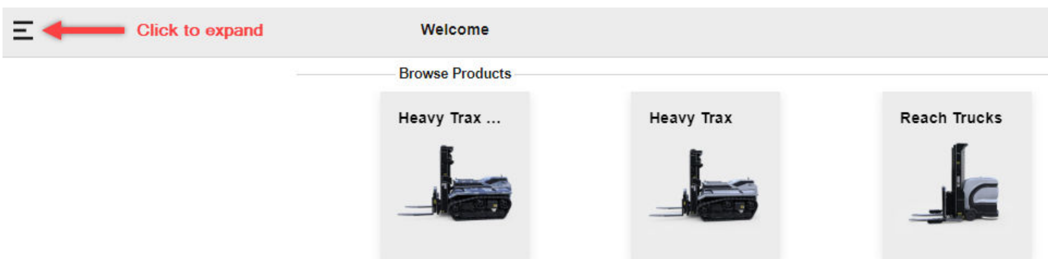


Figure 22-1. Mobile Navigation Menu - Collapsed

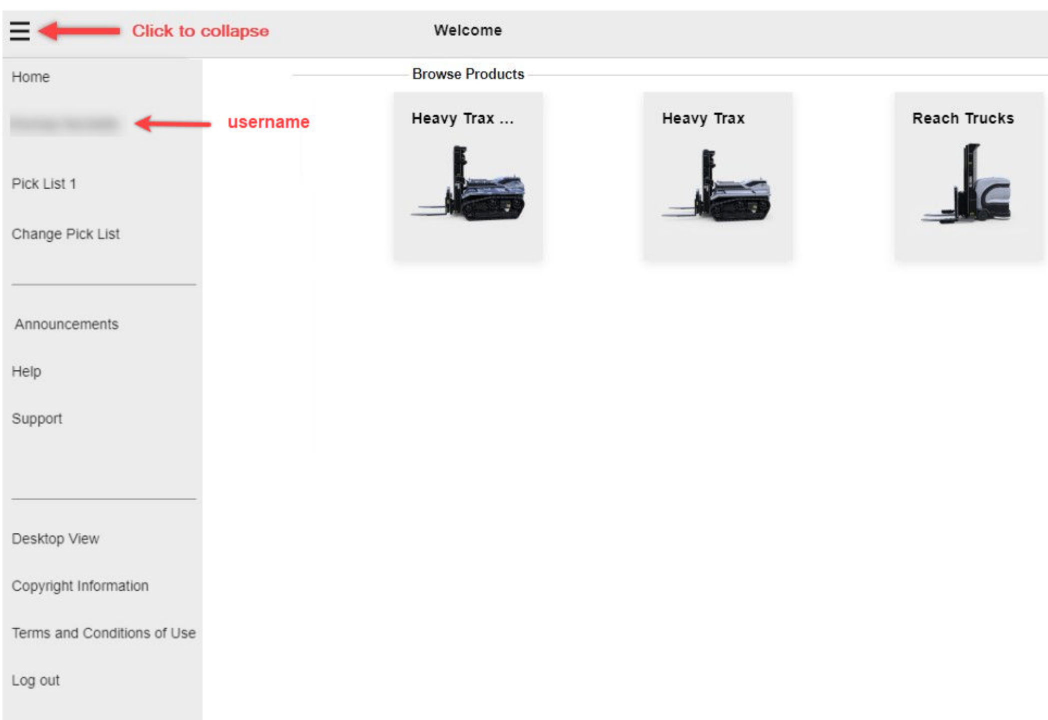


Figure 22-2. Mobile Navigation Menu - Expanded

Mobile - Previously Viewed Products and Publications

On mobile devices, there are navigation dots instead of arrows to scroll through the list of sources, and the options to display Products or Publications appears across the top of the list of sources instead of to the side.

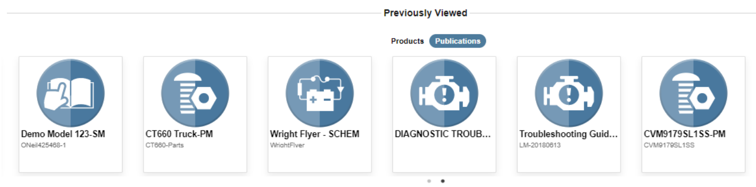


Figure 22-3. Previously Viewed Publications

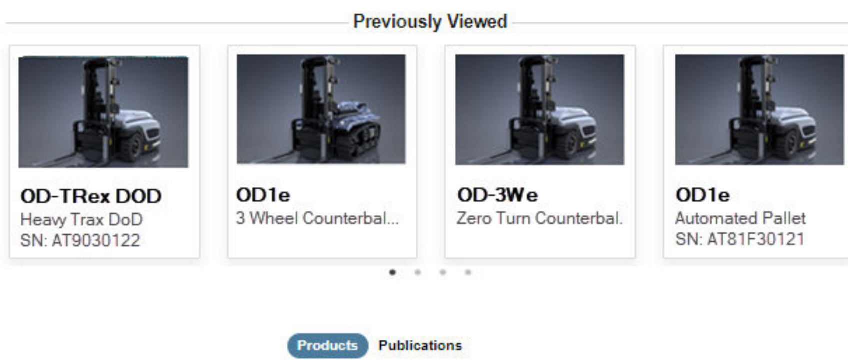


Figure 22-4. Previously Viewed Products

Mobile - Main Search Window

The main search window for mobile devices is expanded or collapsed by clicking on the magnifying glass icon in the upper right of the screen. The list of search filters is expanded by clicking on the arrow beside the Filter drop-down box.

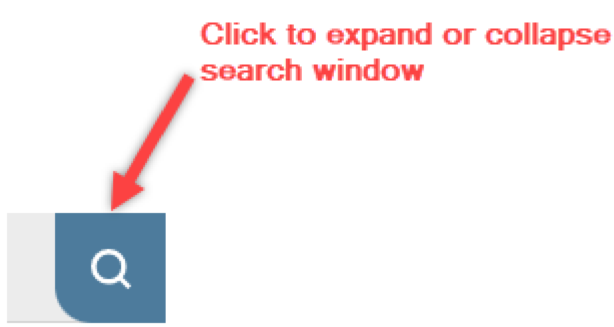


Figure 22-5. Main Search Window - Collapsed

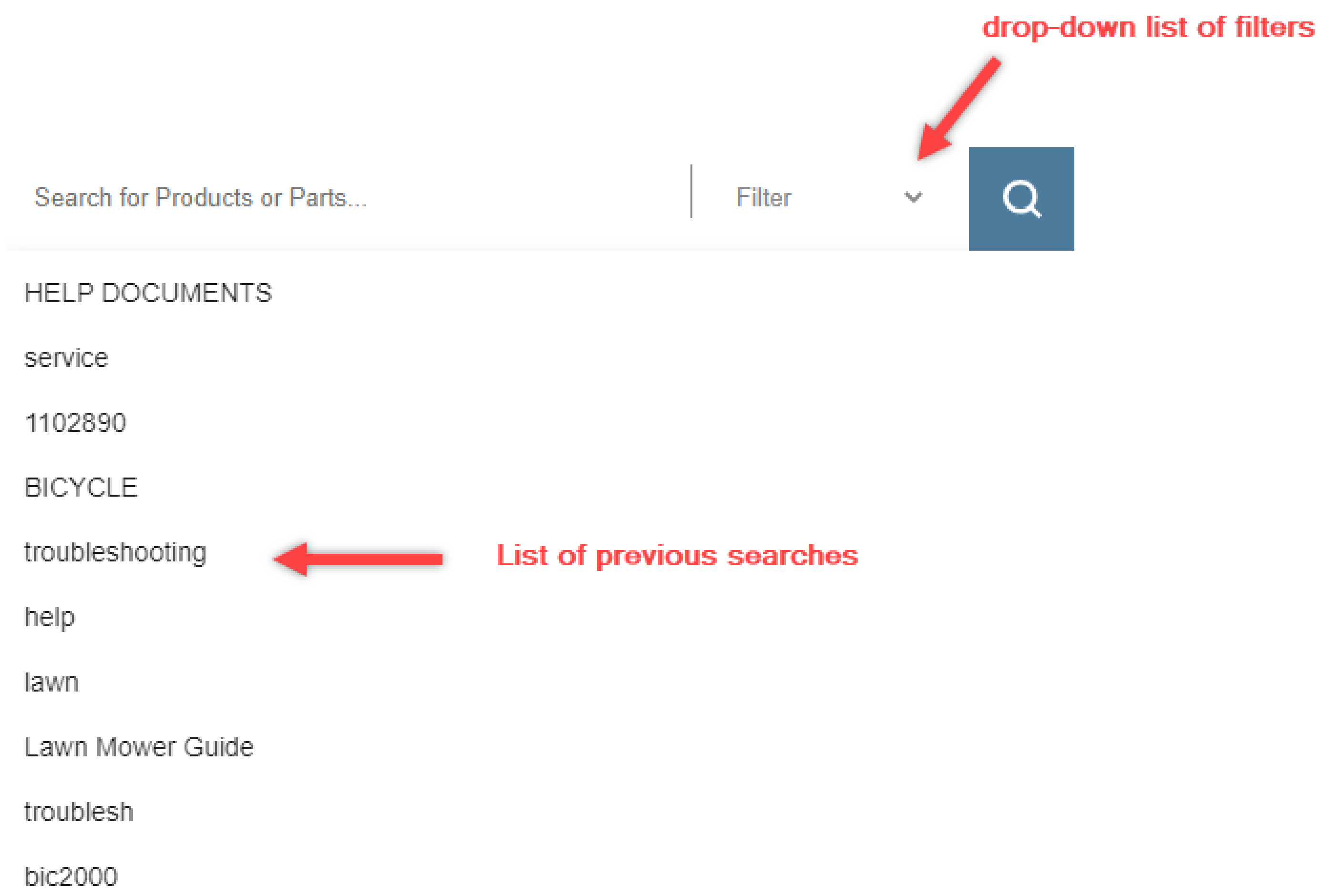


Figure 22-6. Main Search Window - Expanded

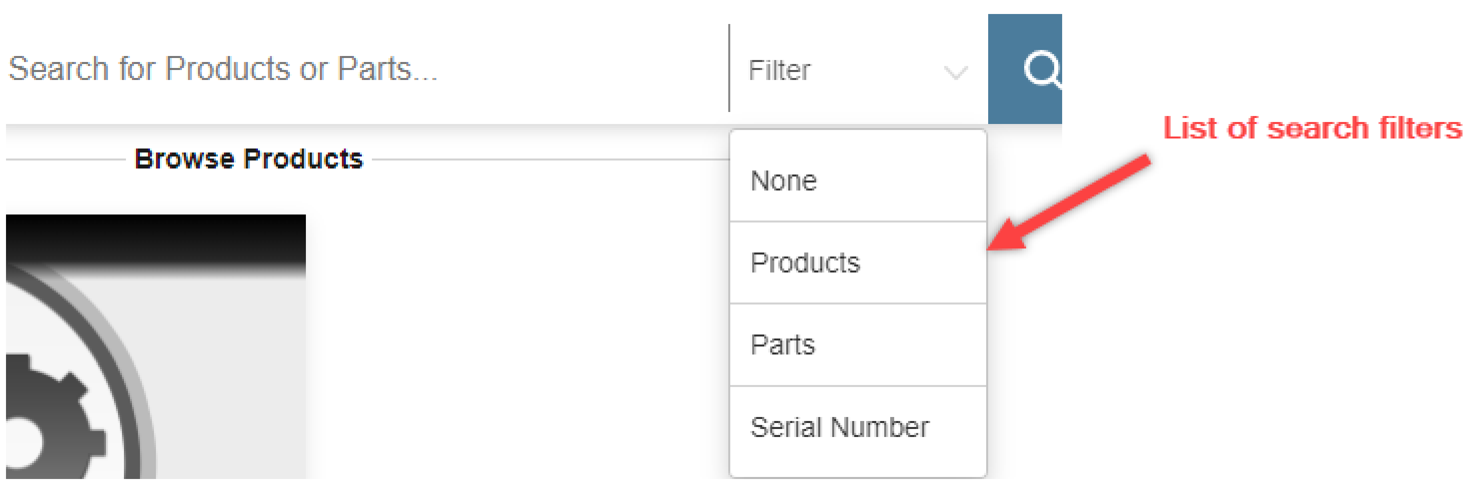


Figure 22-7. Search Filters - Expanded

Mobile - Product Details Screen

Following a search and clicking on a product, the Product Details page displays.

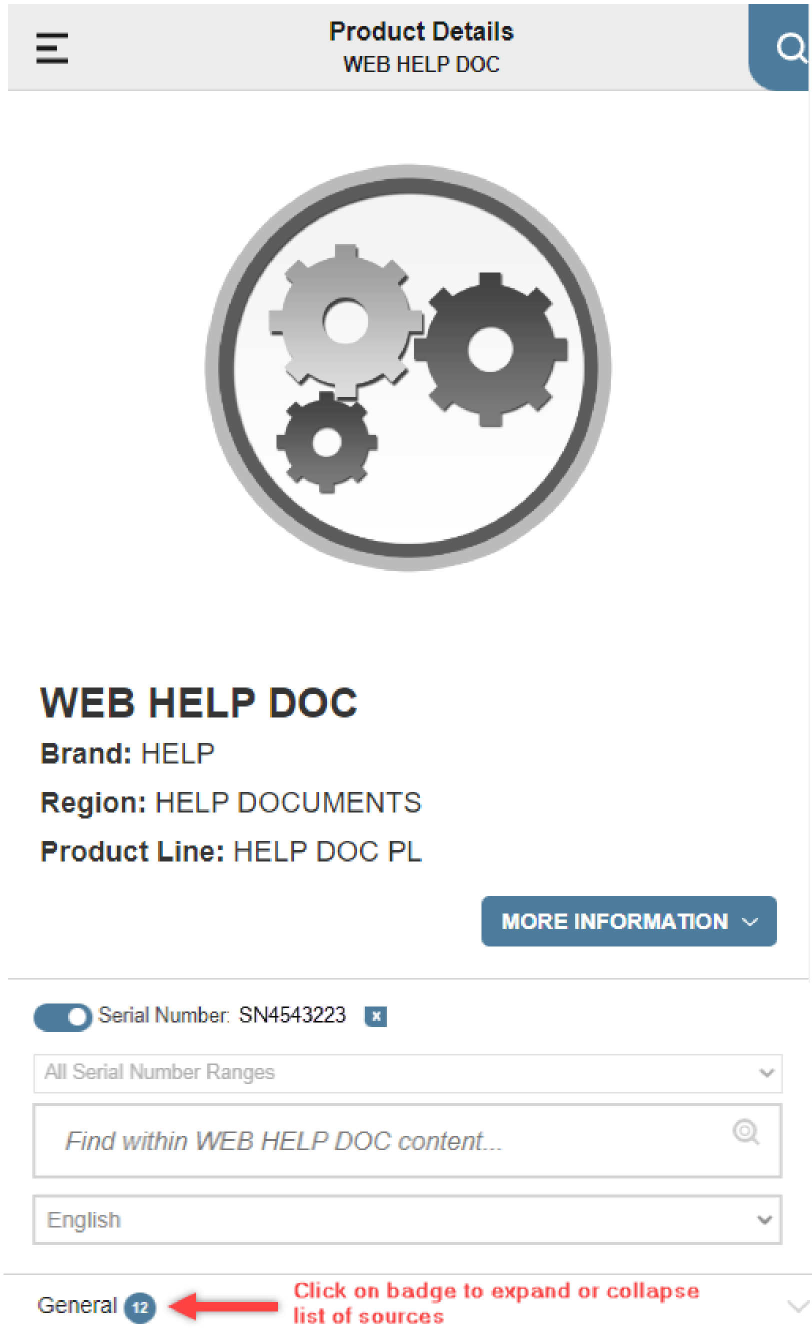


Figure 22-8. Product Details Screen

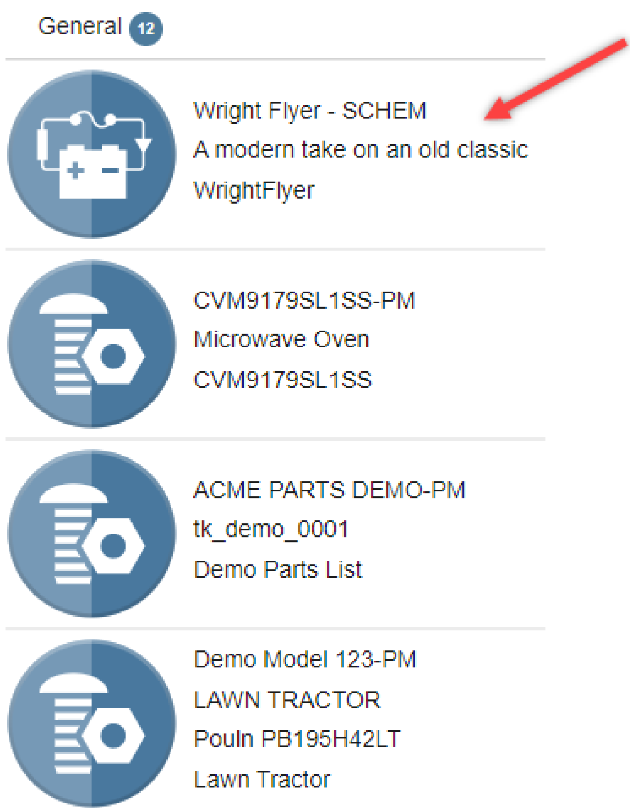


Figure 22-9. Expanded list of Sources

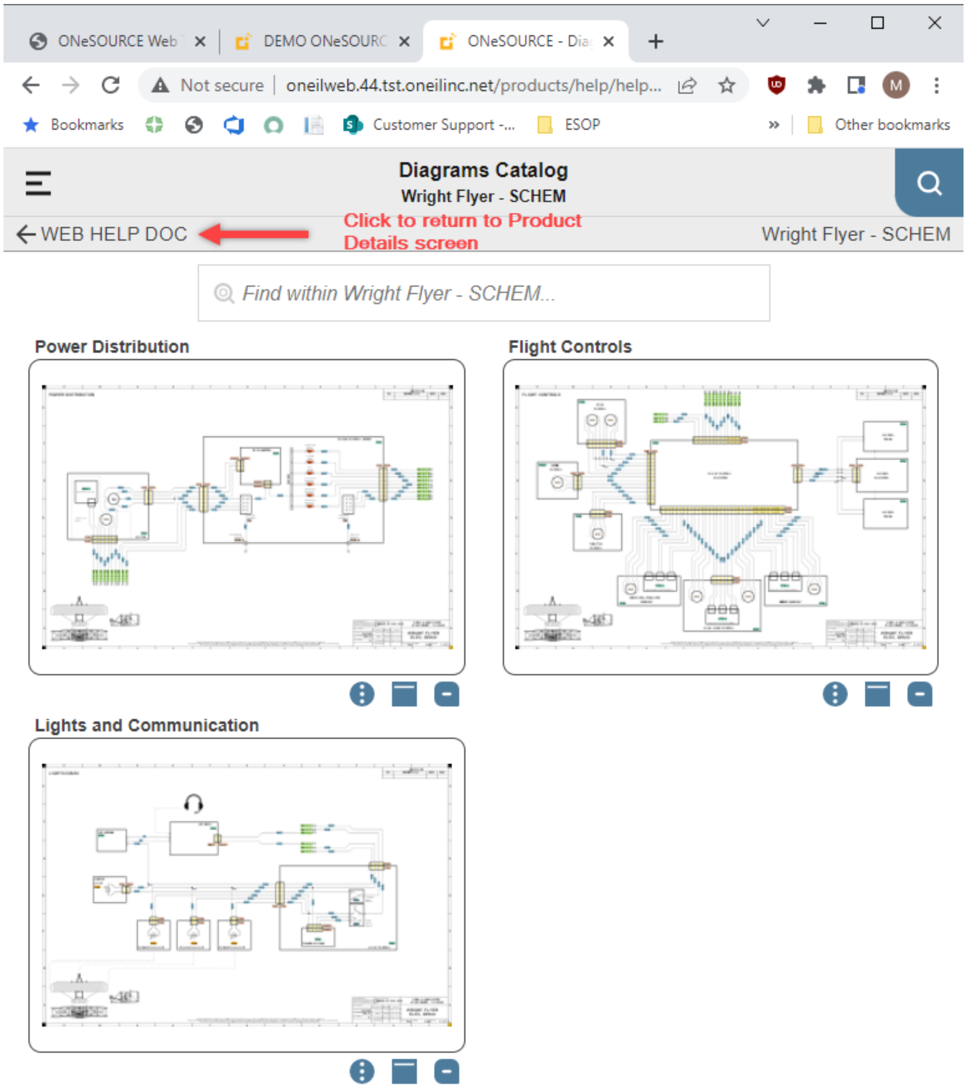


Figure 22-10. Selected Source

Mobile - Operating and Service Publications

After selecting the source, users will see the list of contents.

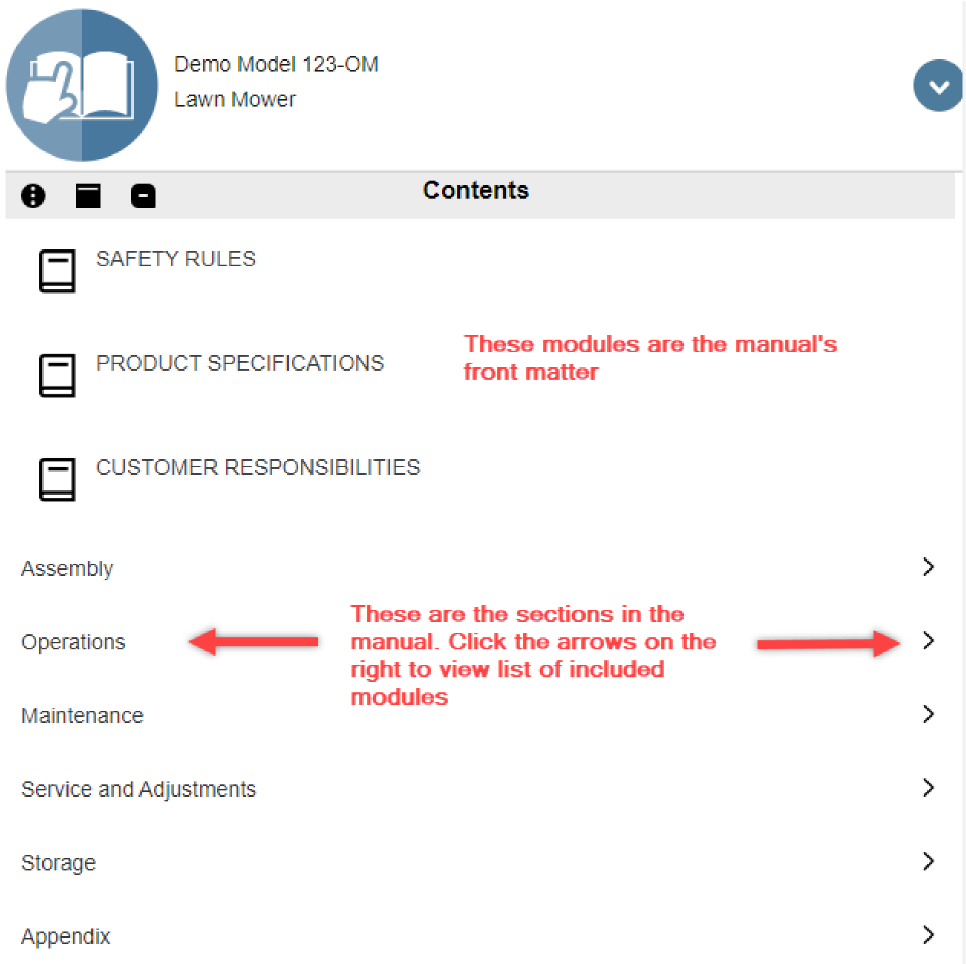


Figure 22-11. Source contents

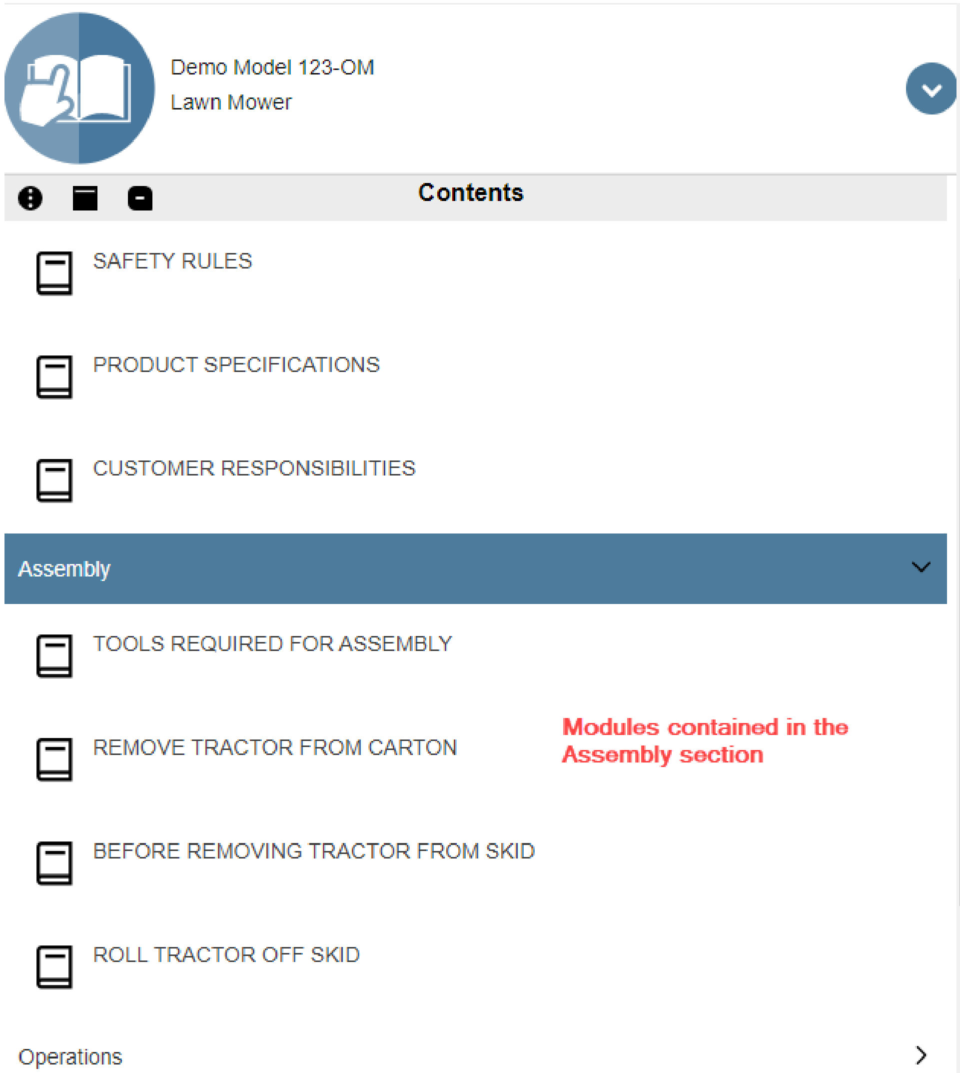


Figure 22-12. Section Contents

Mobile - Parts List Screens

After selecting the source, users will see the parts illustrations.

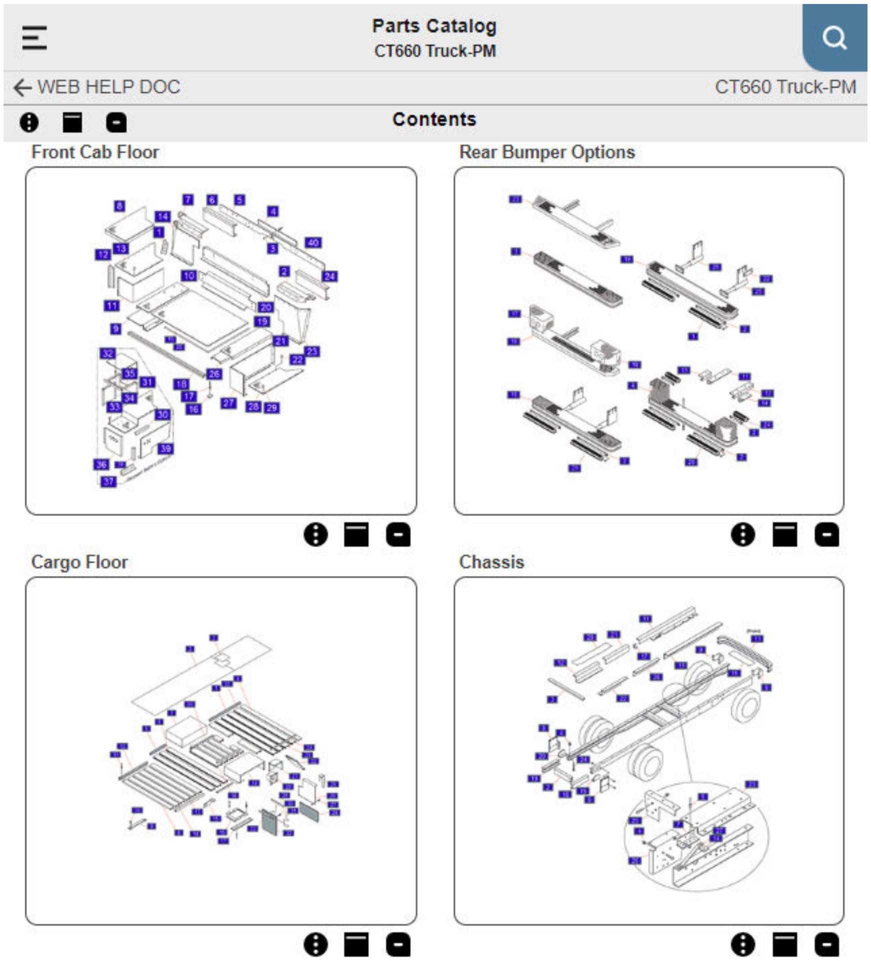


Figure 22-13. Parts Illustrations

1. Click on an illustration to open the parts list.

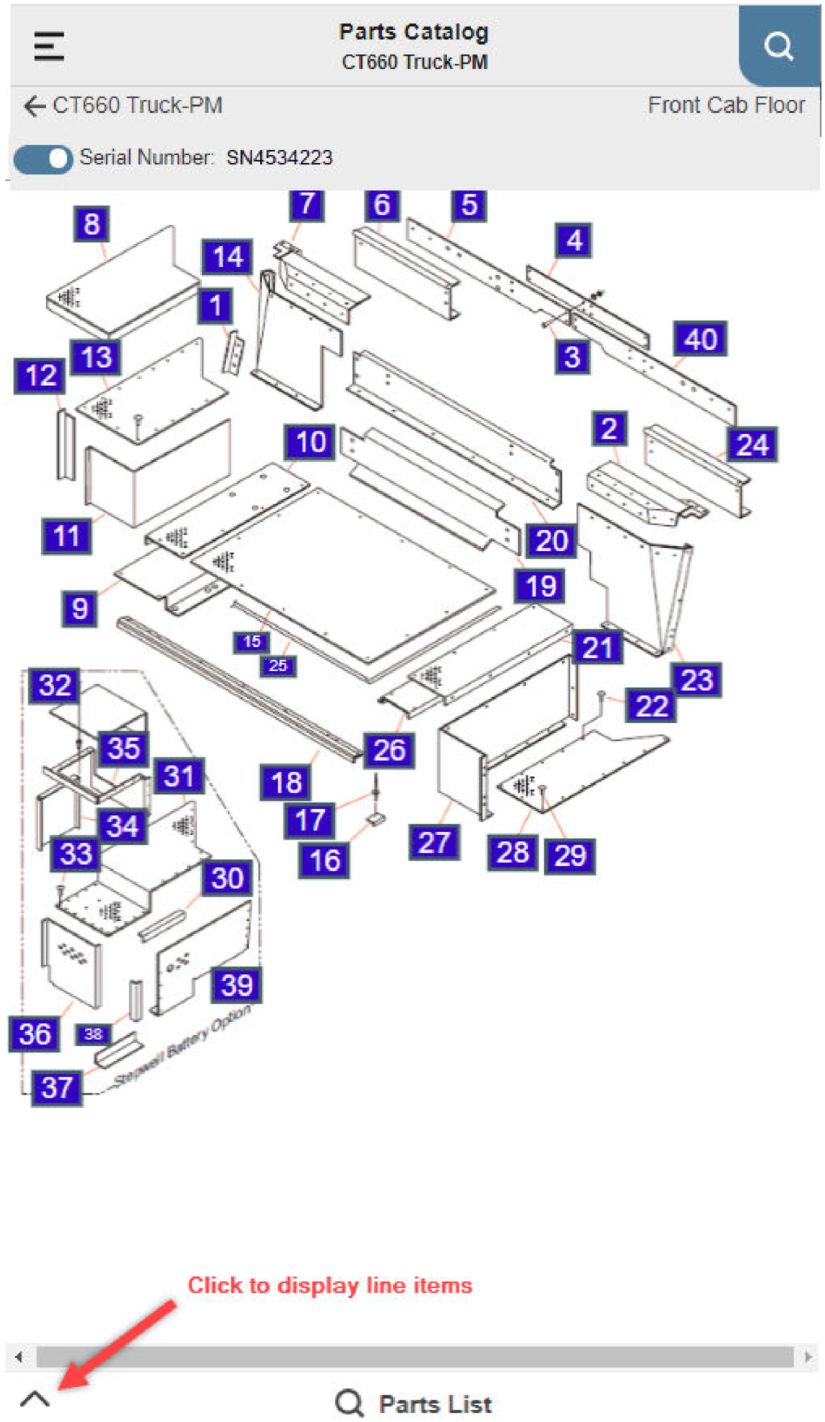


Figure 22-14. Parts Illustration

2. Click on the up arrow or anywhere on that row to open the parts list line items.

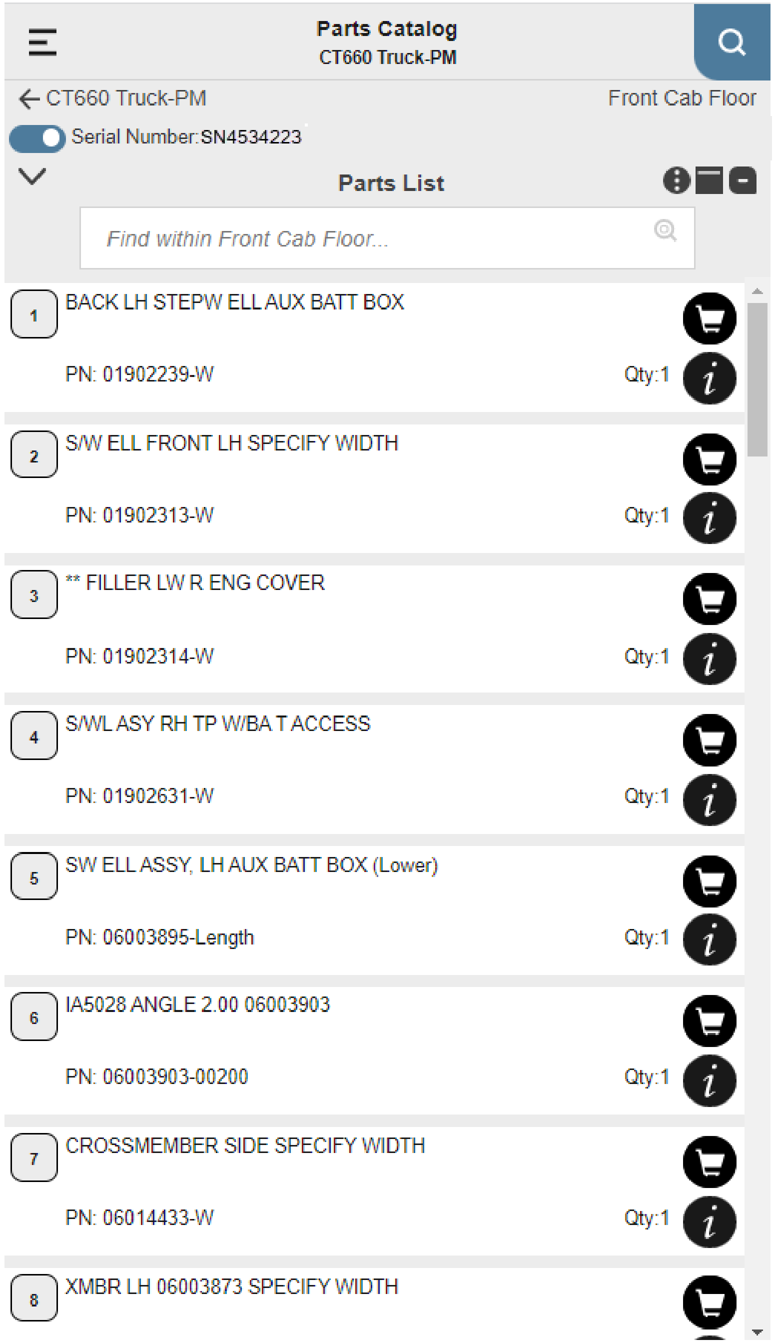


Figure 22-15. Parts List Line Items

3. Click on a line item to display the corresponding hotspot in the parts illustration.

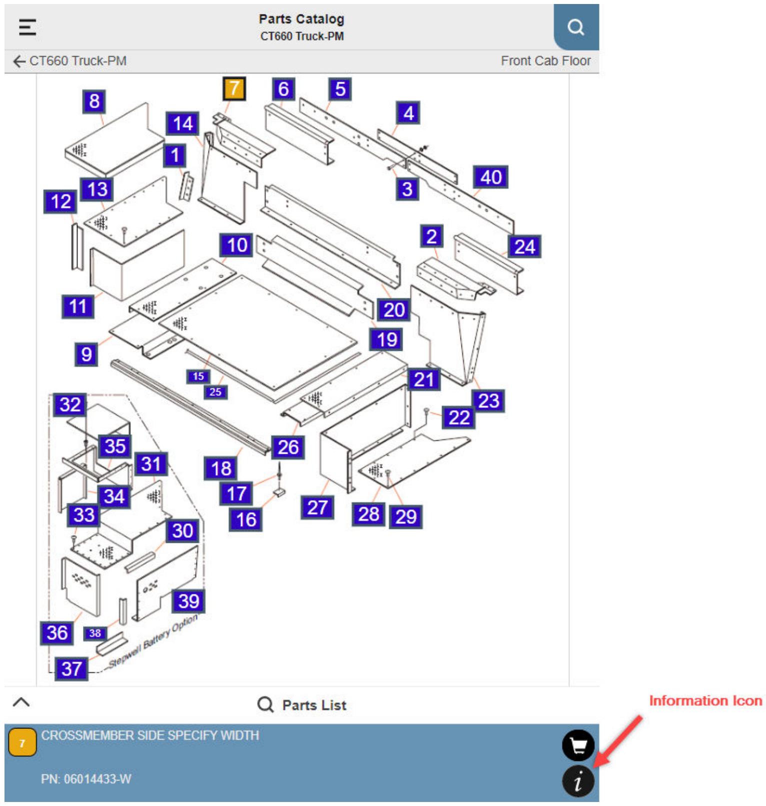


Figure 22-16. Selected Line Item and Corresponding Hotspot

4. Click on the information icon for the line item to display details about the selected part, as well as the notes and feedback icons.

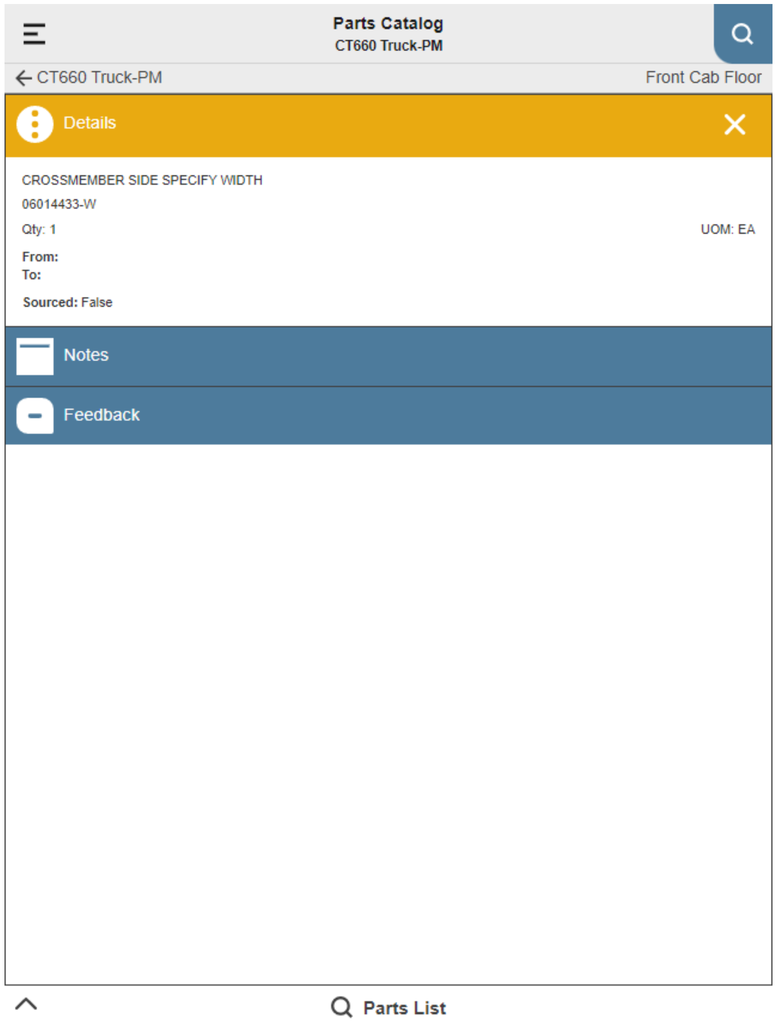


Figure 22-17. Line Item Details

Supersession History
When supersession information is available for a specific part, it will display below the Feedback section:

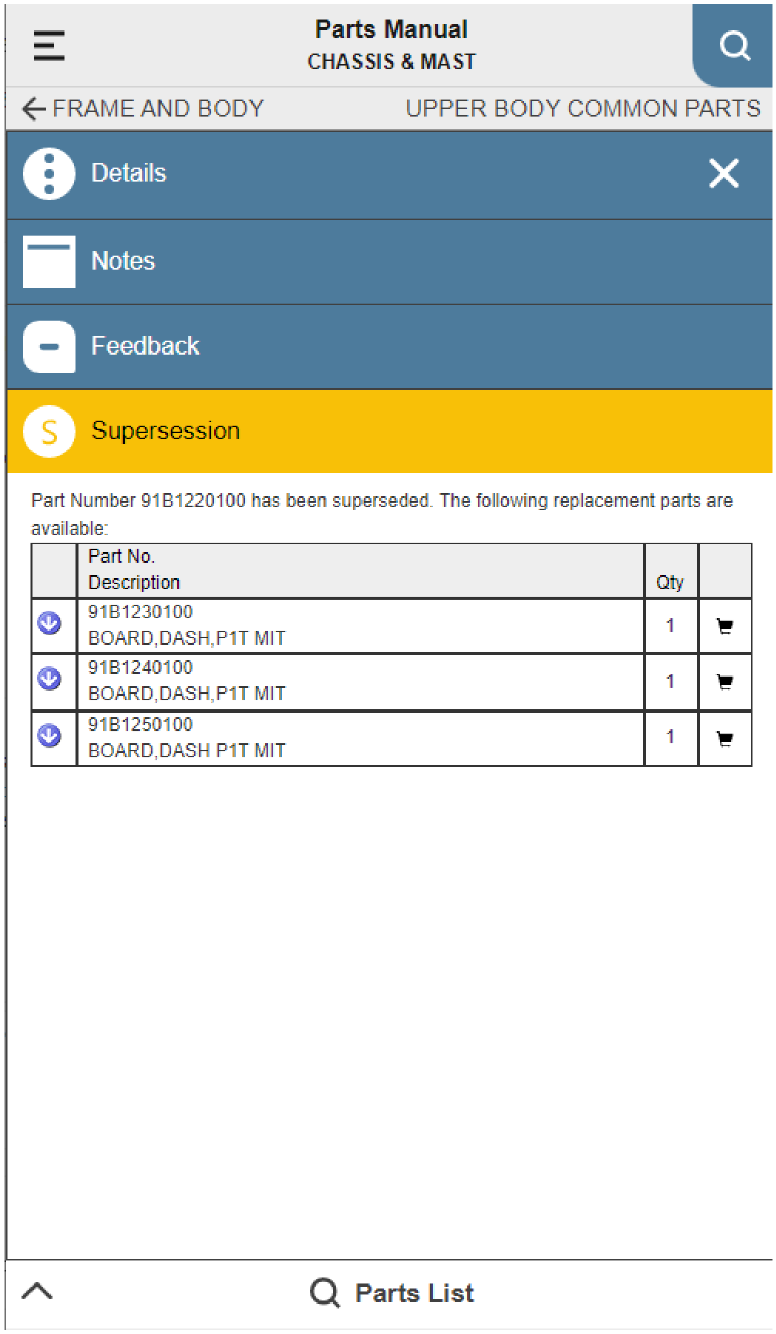


Figure 22-18. Supersession Information

Mobile - Parts List - Cart Icon

Mobile device users can add items in a parts list to the selected picklist by clicking on the cart icon for the desired line item.

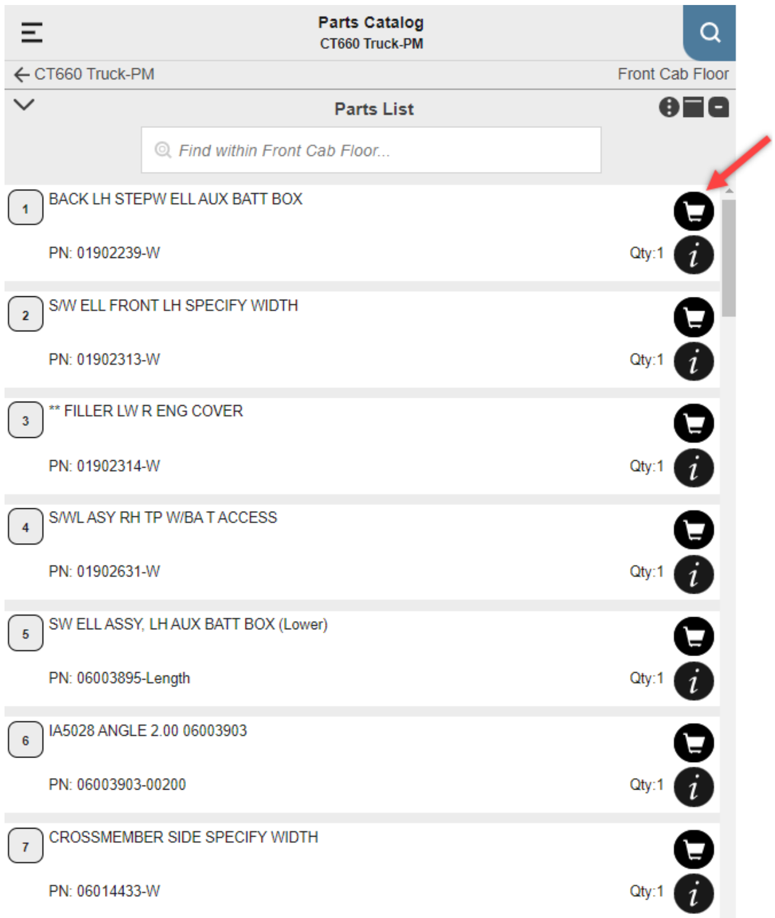


Figure 22-19. Mobile - Parts List Cart Icon

Mobile - Knowledge Model and Diagnostic Troubleshooting Manuals

After selecting a source, users will see the list of symptoms/Diagnostic Troubleshooting Codes.

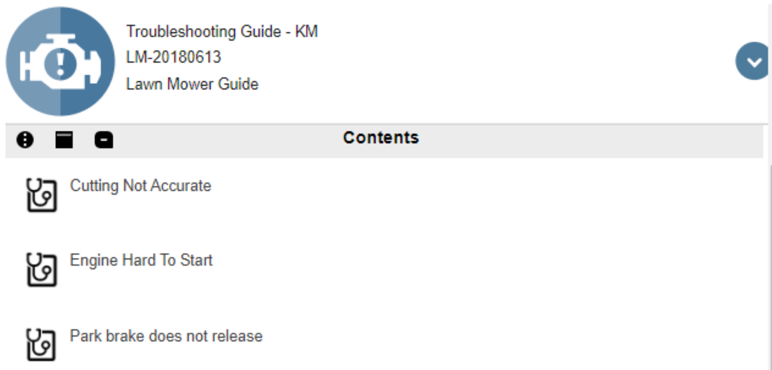


Figure 22-20. Knowledge Model Symptoms

1. Click a symptom to open a session.

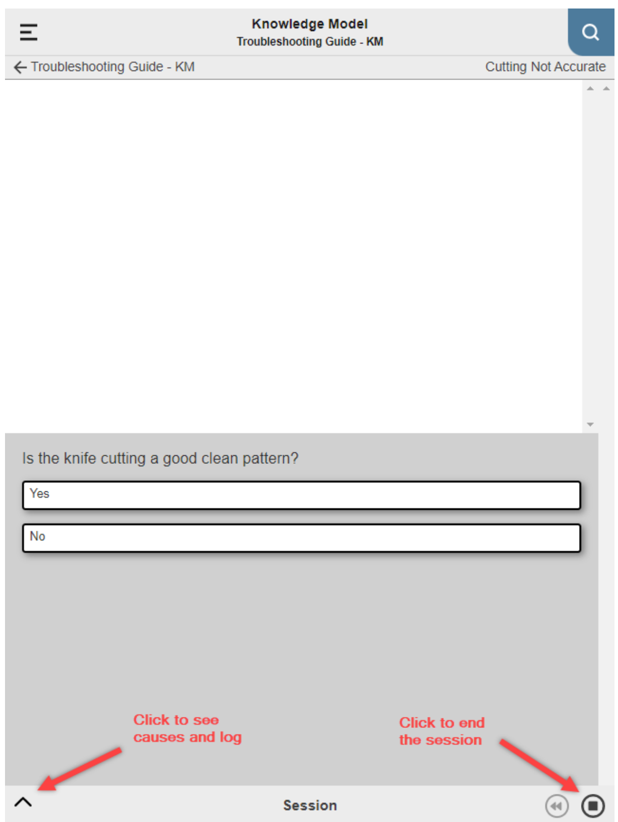


Figure 22-21. Knowledge Model Session

Mobile - Schematics Manuals

After selecting a source, users will see the schematic diagrams.

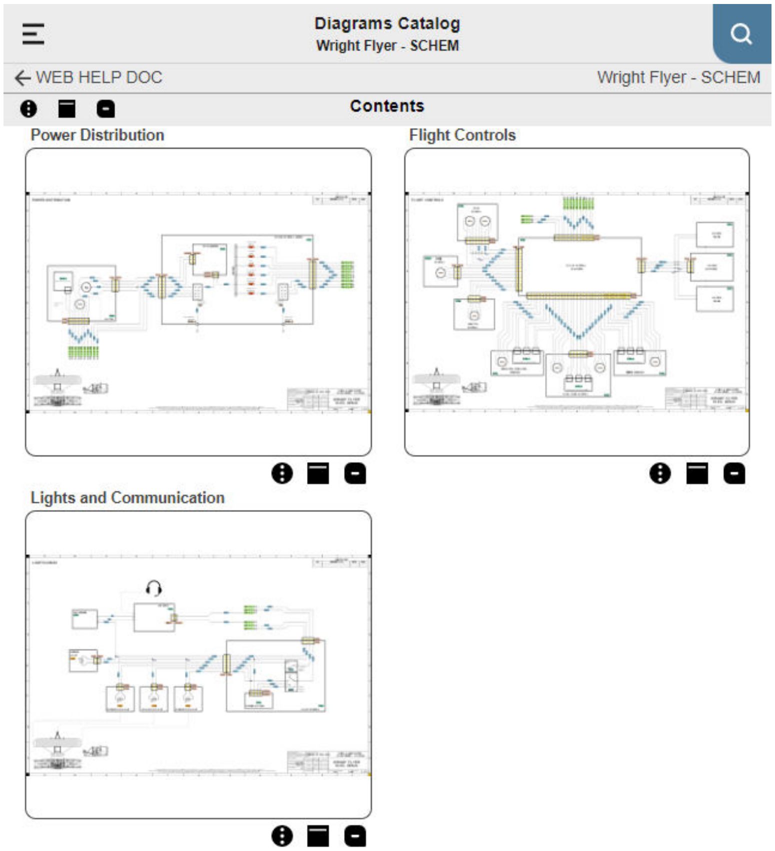


Figure 22-22. Schematic Diagrams

1. Click on a schematic to open it in the viewer.

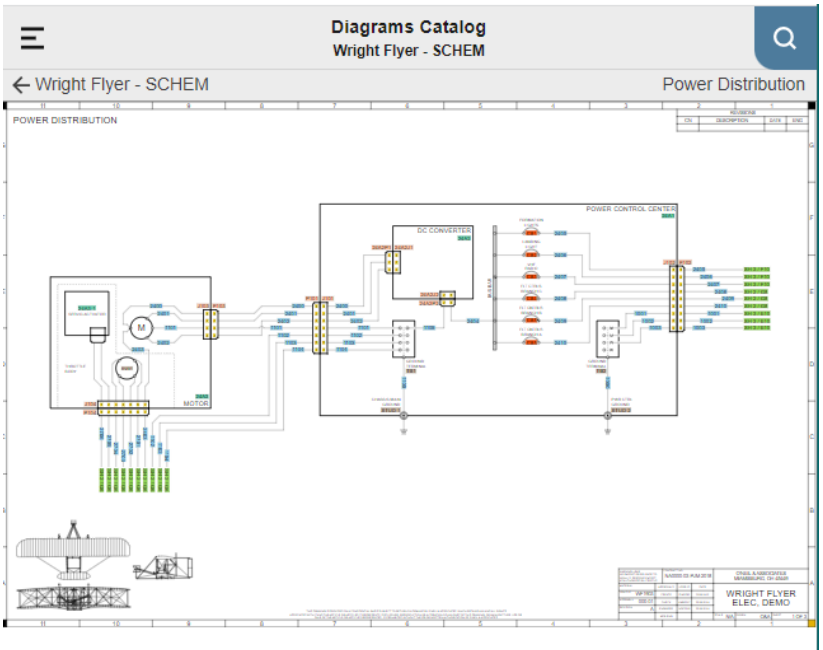


Figure 22-23. Schematic in Viewer

2. Users can click on circuits and components, and use the mouse wheel to zoom in or out.

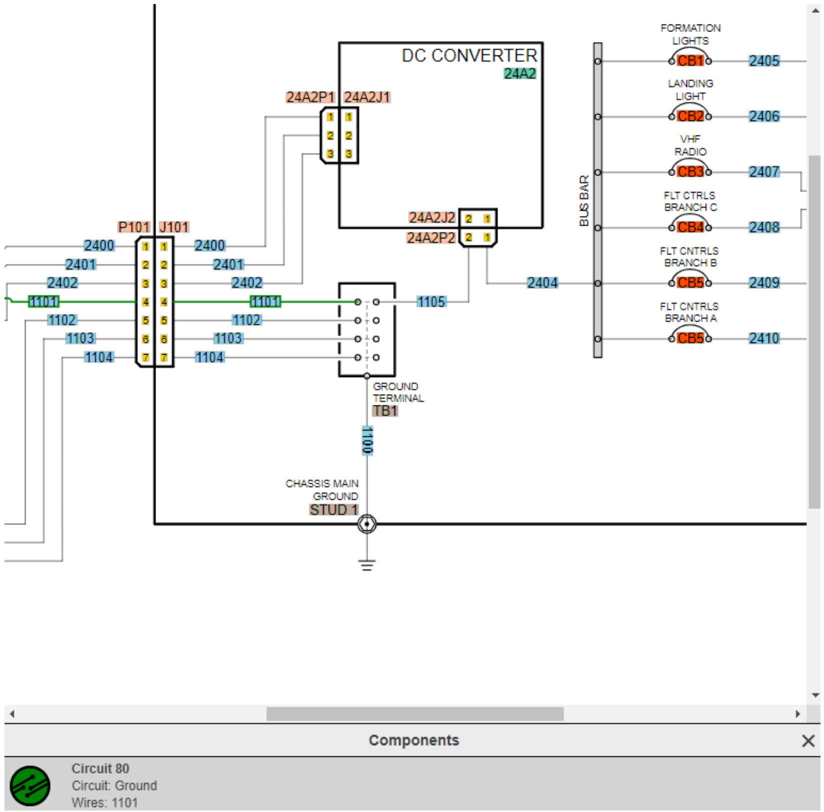


Figure 22-24. Schematic Zoomed In with Circuit Selected

Mobile - Pick Lists

The following are steps for selecting an existing pick list from a mobile device or creating a new pick list.

1. Click on the mobile device navigation menu in the top left of the screen.

Figure 22-25. Mobile Navigation Menu

2. The menu will show options for pick lists.

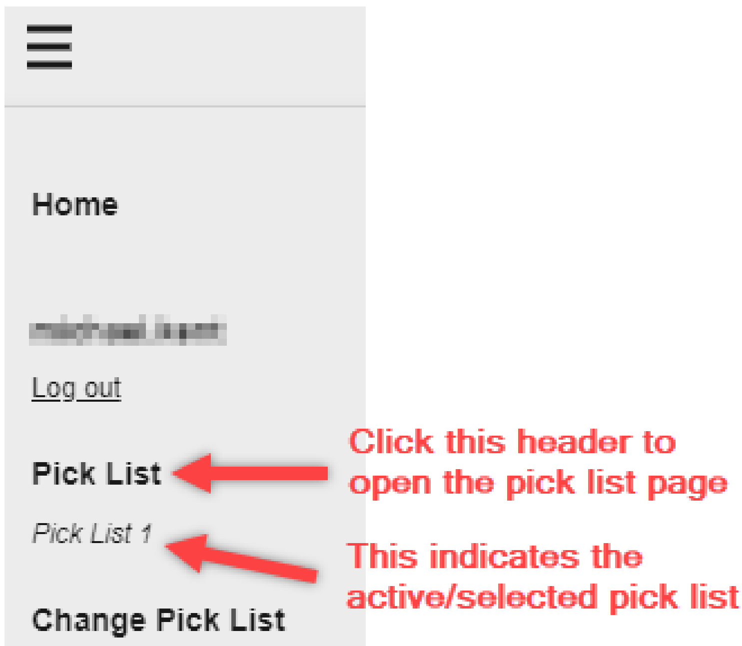


Figure 22-26. Pick List Options

3. Click on the Pick List option to open the selected Pick List.

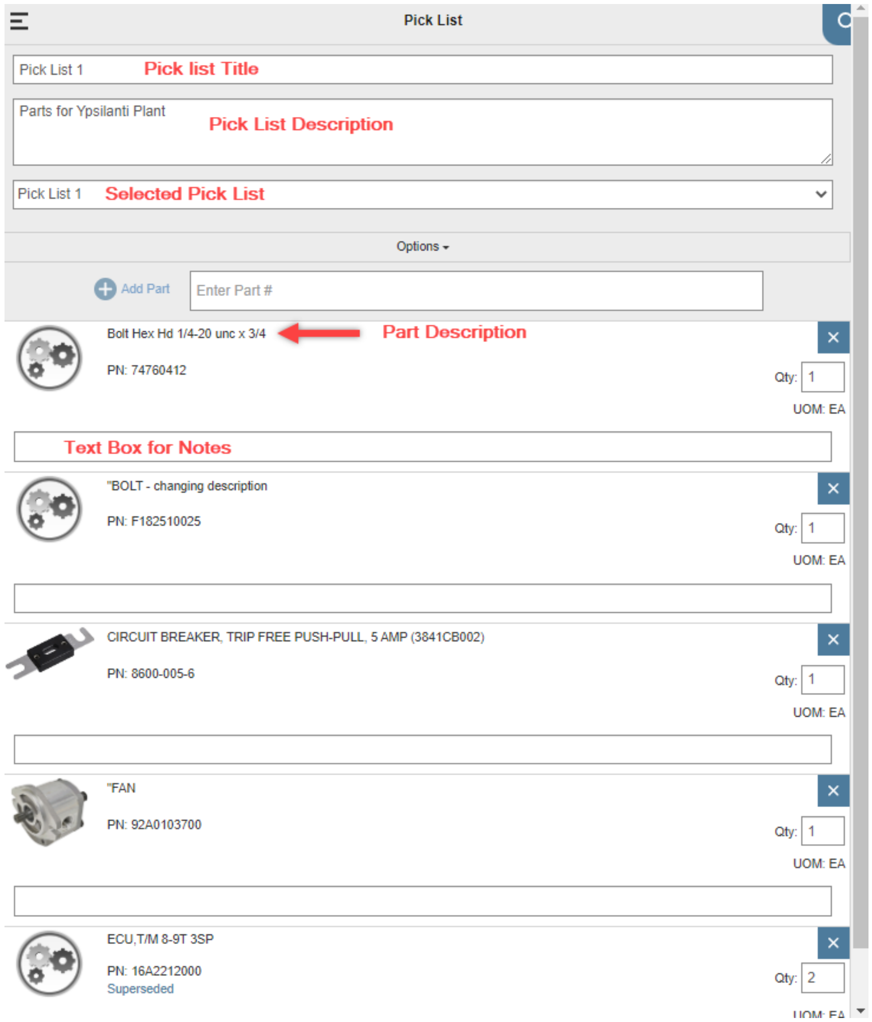


Figure 22-27. Sample Pick List - Mobile

4. To create a new pick list or change the selected pick list, click on the Change Pick List option.

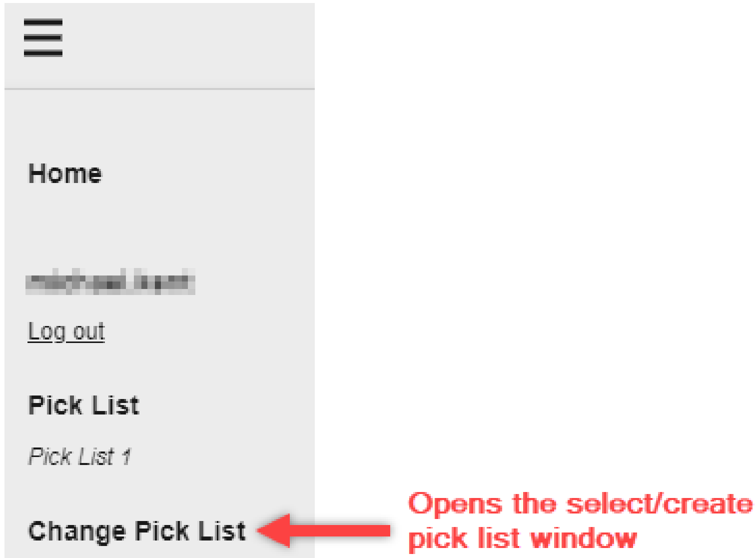


Figure 22-28. Create New Pick List

5. The Select Pick List window will open.

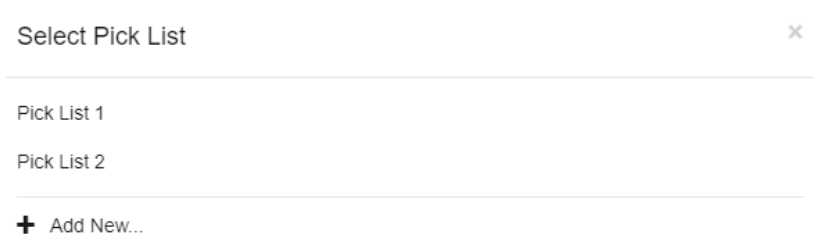


Figure 22-29. Select Pick List Window

6. Select the new pick list or click on **+ Add New** to create a new one.
7. Users can also change the selected Pick List from within an open Pick List by using the drop-down list and selecting the desired list.

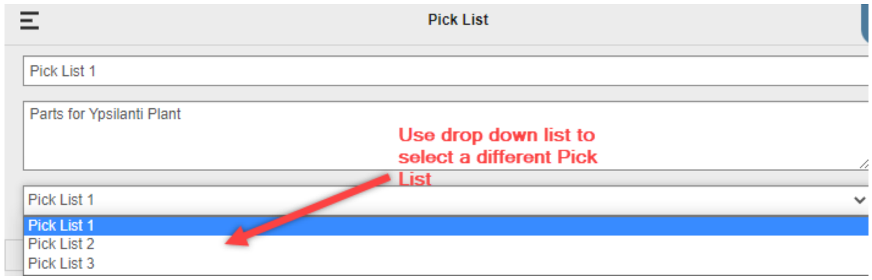


Figure 22-30. Select Pick List Drop-Down List